



Cloud Shared Office

**Web Report** for salesforce

## **Simple Setup Guide**



Cloud Shared Office

|      |                                                                                     |    |
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## 1 In the Beginning

In CSO WebReport for Salesforce, anyone can easily create various Salesforce reports with your familiar Excel.

Configure data-mapping, multi-overlay that uses multiple sheets, and automatic output all without programming.

This guide will take you through the setting up of registering created overlay to the output of reports.

A guide for designing reports are to be released separately.

This guide does not include the setup of Salesforce.

## 2 Initial Settings

When importing CSO WebReport for Salesforce, it is necessary to configure the following settings first.

- ☐ User page layout settings
  - ✓ Allow CSO Settings to be displayed on the Manage Users page in Salesforce.
- ☐ Prepare for report output
  - ✓ Configure output objects.
  - ✓ Place the Create Report button.
- ☐ Report information settings
  - ✓ Register your created overlay to CSO WebReport for Salesforce.
  - ✓ Data-mapping to configure the output order of sheets and to automatically insert the information registered in Salesforce.
- ☐ Enable Salesforce users
  - ✓ From the Manage Users page in Salesforce, enable CSO WebReport for Salesforce.
  - ✓ Batch enable CSO WebReport for Salesforce for multiple users.

## CSO WebReport for salesforce Simple Setup Guide

### 2.1 User page layout settings

To allow CSO Settings to be displayed on the Manage Users page in Salesforce, go to Settings (in Salesforce) >> Manage Users >> Profiles.

Then select System Administrator.

The screenshot shows the Salesforce 'User Profiles' page. The left sidebar contains the 'Administration Setup' menu, with 'Profiles' highlighted. The main content area shows a table of user profiles. The 'System Administrator' profile is highlighted with a red box.

| Action               | Name                                             | User License                     | Custom                              |
|----------------------|--------------------------------------------------|----------------------------------|-------------------------------------|
| <a href="#">Edit</a> | <a href="#">Chatter External User</a>            | Chatter External                 | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Chatter Free User</a>                | Chatter Free                     | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Chatter Moderator User</a>           | Chatter Free                     | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Chatter Only User</a>                | Chatter Only                     | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Content Only User</a>                | Content Only                     | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Contract Manager</a>                 | Salesforce                       | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Customer Community Login User</a>    | Customer Community Login         | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Customer Community User</a>          | Customer Community               | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Customer Portal Manager</a>          | Customer Portal Manager          | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Customer Portal Manager Custom</a>   | Customer Portal Manager Custom   | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Customer Portal Manager Standard</a> | Customer Portal Manager Standard | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Customer Portal User</a>             | Customer Portal User             | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Force.com - One App User</a>         | Force.com - One App              | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Gold Partner User</a>                | Gold Partner                     | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">High Volume Customer Portal User</a> | High Volume Customer Portal      | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Knowledge Only User</a>              | Knowledge Only                   | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Marketing User</a>                   | Salesforce                       | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Partner Community Login User</a>     | Partner Community Login          | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Partner Community User</a>           | Partner Community                | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Read Only</a>                        | Salesforce                       | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Siteforce Only User</a>              | Siteforce Only                   | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Solution Manager</a>                 | Salesforce                       | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Standard Platform User</a>           | Salesforce Platform              | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Standard User</a>                    | Salesforce                       | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">System Administrator</a>             | Salesforce                       | <input type="checkbox"/>            |
| <a href="#">Edit</a> | <a href="#">Test OneApp</a>                      | Force.com - One App              | <input checked="" type="checkbox"/> |
| <a href="#">Edit</a> | <a href="#">Work.com Only User</a>               | Work.com Only                    | <input type="checkbox"/>            |

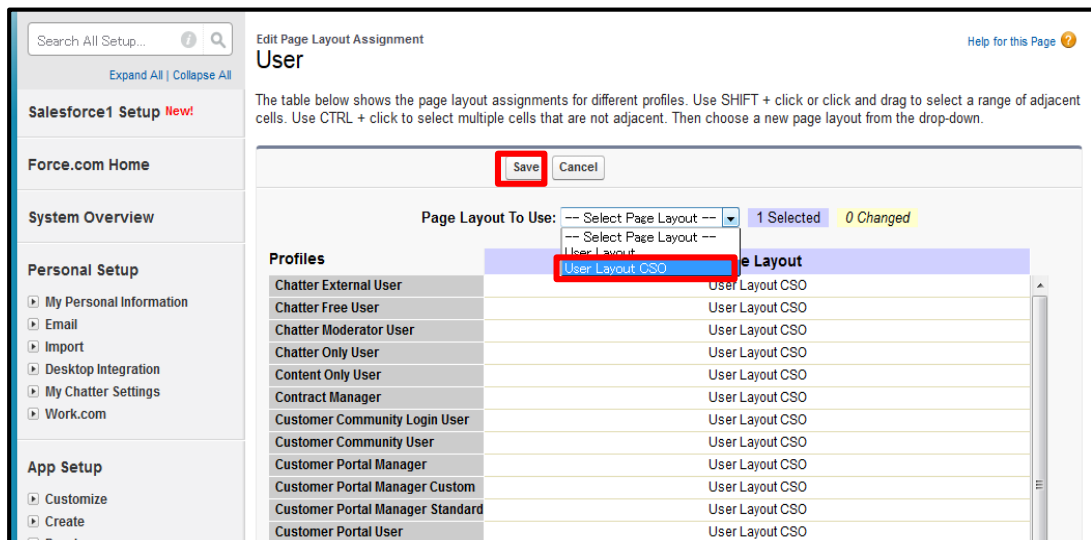
From the System Administrator's profile page, click User's "View Assignment".

The screenshot shows the Salesforce 'User Layout CSO' page. The left sidebar contains the 'Administration Setup' menu, with 'Profiles' highlighted. The main content area shows a table of user layouts. The 'User Layout CSO' layout is highlighted with a red box.

| Layout Name           | View Assignment                              |
|-----------------------|----------------------------------------------|
| Badge Received        | <a href="#">Badge Received Layout 192</a>    |
| Campaign              | <a href="#">Campaign Layout</a>              |
| Campaign Member       | <a href="#">Campaign Member Page Layout</a>  |
| Case                  | <a href="#">Case Layout</a>                  |
| Case Close            | <a href="#">Close Case Layout</a>            |
| Coaching              | <a href="#">Coaching Layout</a>              |
| Contact               | <a href="#">Contact Layout</a>               |
| Contract              | <a href="#">Contract Layout</a>              |
| Event                 | <a href="#">Event Layout</a>                 |
| Feedback              | <a href="#">Feedback Layout</a>              |
| Feedback Question     | <a href="#">Feedback Question Layout</a>     |
| Feedback Question Set | <a href="#">Feedback Question Set Layout</a> |
| Feedback Request      | <a href="#">Feedback Request Layout</a>      |
| Goal                  | <a href="#">Goal Layout</a>                  |
| Opportunity Product   | <a href="#">Opportunity Product Layout</a>   |
| Order                 | <a href="#">Order Layout</a>                 |
| Order Product         | <a href="#">Order Product Layout</a>         |
| Performance Cycle     | <a href="#">Performance Cycle Layout</a>     |
| Price Book            | <a href="#">Price Book Layout</a>            |
| Price Book Entry      | <a href="#">Price Book Entry Layout</a>      |
| Product               | <a href="#">Product Layout</a>               |
| Reward                | <a href="#">Reward Layout 192</a>            |
| Reward Fund           | <a href="#">Reward Fund Layout</a>           |
| Reward Fund Type      | <a href="#">Reward Fund Type Layout</a>      |
| Solution              | <a href="#">Solution Layout</a>              |
| Task                  | <a href="#">Task Layout</a>                  |
| Thanks                | <a href="#">Thanks Layout</a>                |
| User                  | <a href="#">User Layout CSO</a>              |

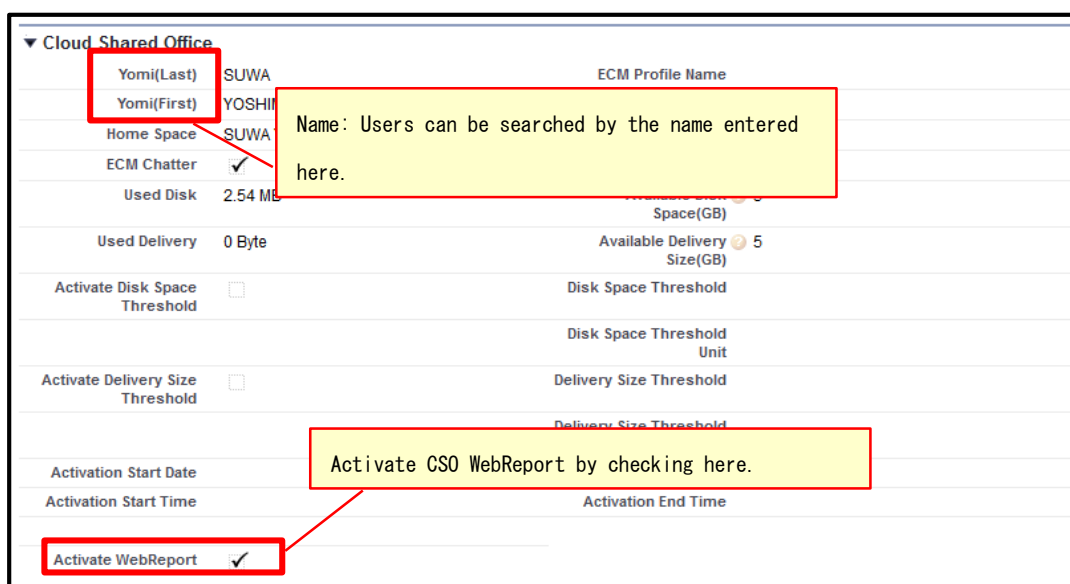
Click the "Edit Assignment" button, select "User Layout CSO" from the drop-down list beside "Page Layout to Use", then click the "Save" button.

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On your own User Detail page in Salesforce, a section of “Cloud Shared Office” should have now been added to your user detail. Click the “Edit” button to edit necessary items.

To enable WebReport, please be sure to check the box beside “Activate WebReport”. (This is further explained in chapter 2.7.)

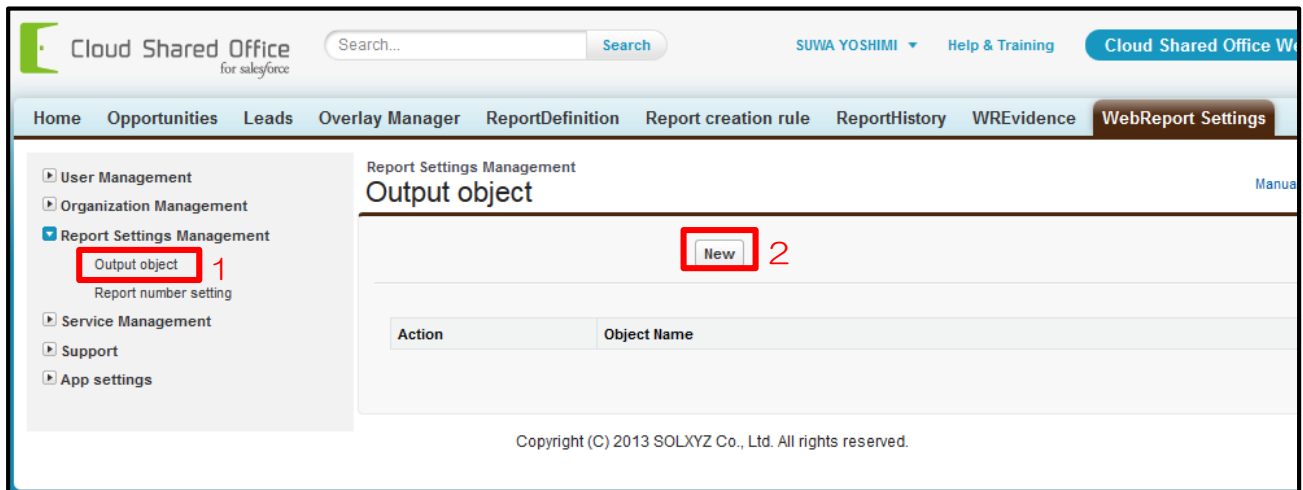


## 2.2 Output Object Settings

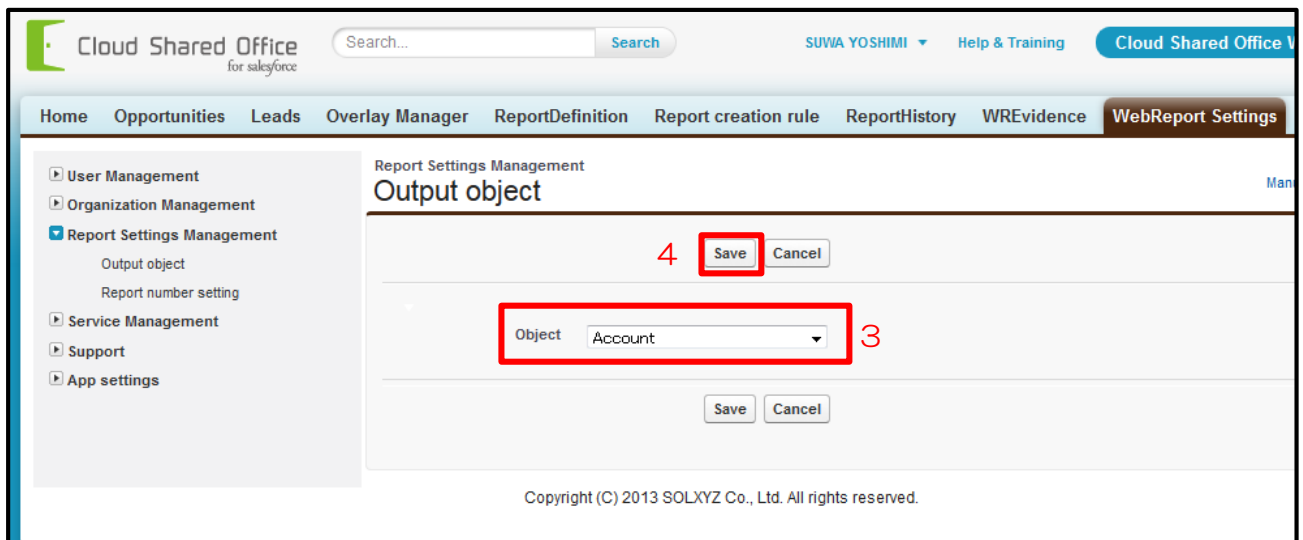
Configure output objects.

Go to WebReport setting >> Report Settings Management >> Output Object, click the “New” button.

## CSO WebReport for salesforce Simple Setup Guide



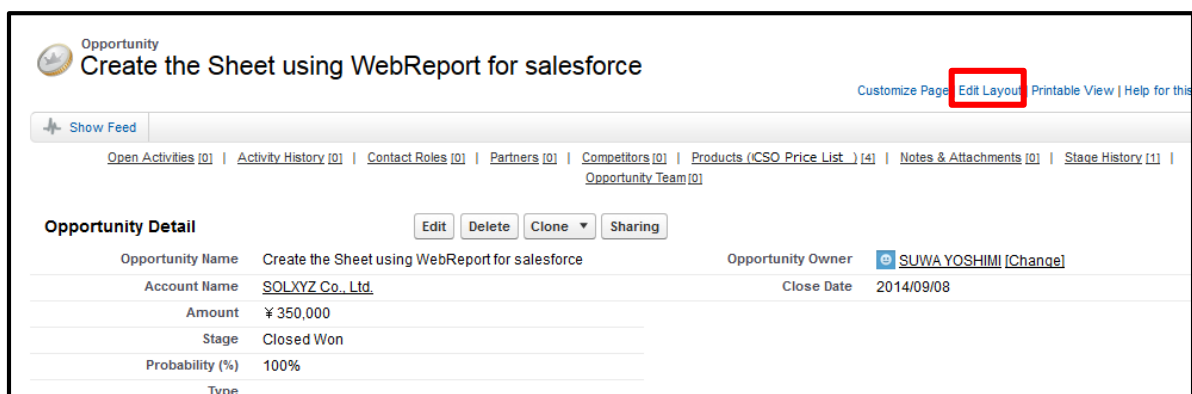
Select the object you wish to output and click the “Save” button.



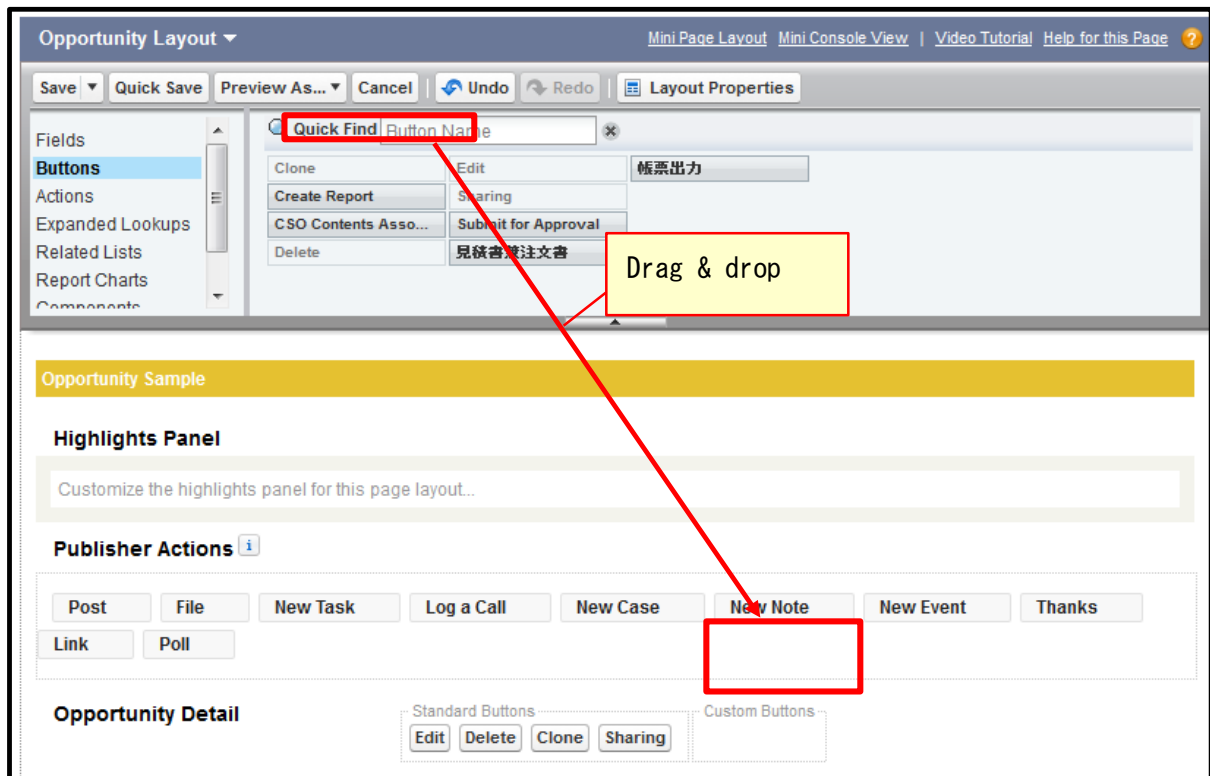
### 2.3 Place the Create Report Button

Place the “Create Report” button in the created Output Objects.

Open the target object, click on “Edit Layout”.



Drag and drop the “Create Report” button to the “Custom Buttons” area.

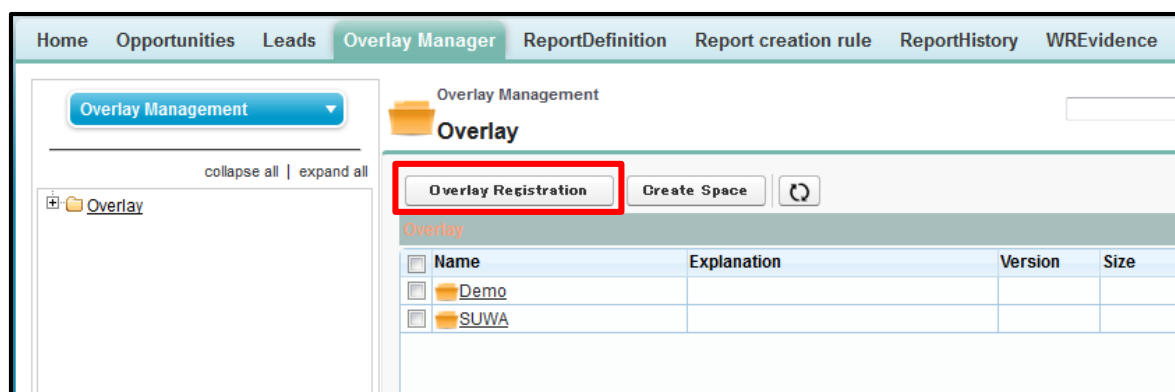


After placing the “Create Report” button, click the “Save” button to save.

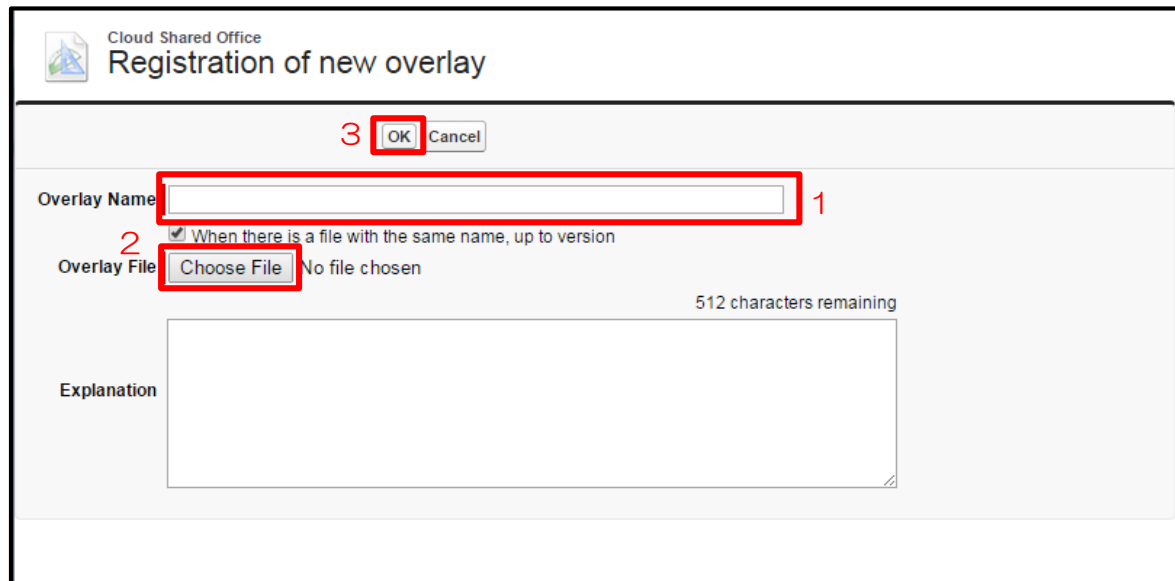
## 2.4 Register Overlay

After creating an overlay, register it to your CSO WebReport for Salesforce.

Click on the “Overlay Manager” tab, and click the “Overlay Registration” button.



After entering an “Overlay Name”, click the “Choose File” button to select a created overlay, then click the “OK” button to register.

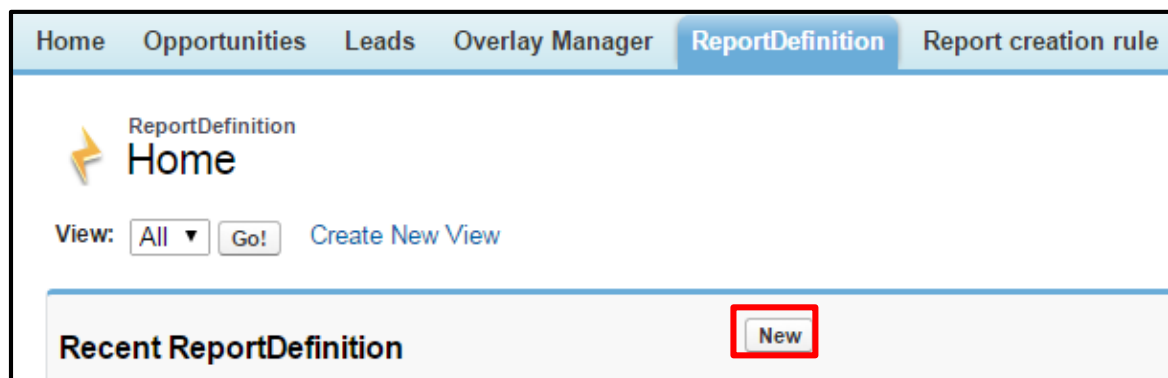


The image shows a dialog box titled "Registration of new overlay" from "Cloud Shared Office". It contains the following elements:

- Buttons: "OK" and "Cancel" at the top right, with a red box around the "OK" button and a red number "3" next to it.
- Overlay Name: A text input field with a red box around it and a red number "1" to its right.
- Overlay File: A section with a checked checkbox "When there is a file with the same name, up to version", a "Choose File" button (with a red box around it and a red number "2" next to it), and the text "No file chosen".
- Explanation: A large text area at the bottom, with "512 characters remaining" indicated at the top right.

## 2.5 Register Report Definitions

Click "ReportDefinition" on the tab, and click the "New" button.



The image shows the "ReportDefinition" page in the application. It features a navigation bar with tabs: "Home", "Opportunities", "Leads", "Overlay Manager", "ReportDefinition" (selected), and "Report creation rule". The main content area is titled "ReportDefinition Home" and includes a "View:" section with a dropdown menu set to "All", a "Go!" button, and a "Create New View" link. At the bottom, there is a "Recent ReportDefinition" section with a "New" button highlighted by a red box.

- ① Under "Basic Settings", enter the definition name, select a registered overlay, select an output object, and select the target users.



The screenshot shows the 'New Report Definition' dialog box with several annotations:

- Basic Settings:** A red box highlights the 'Basic Settings' tab.
- Name:** A red box highlights the 'Name' input field, with a callout box saying 'Enter the definition'.
- Explanation:** A red box highlights the 'Explanation' text area, with a callout box saying 'Click the "Search" button and select a registered overlay.'
- Overlay:** A red box highlights the 'Overlay' input field and the 'Search' button.
- Object:** A red box highlights the 'Object' list, which contains 'Account'. A red box highlights the 'Add' button, with a callout box saying 'Select object and click the "Add" button to move the object.'
- Authority:** A red box highlights the 'Authority' section, which contains a 'USER' dropdown and a 'Search' button.
- Users can be selected:** A red box highlights the list of users that can be selected, which contains 'User:AllUser'.
- Selected users:** A red box highlights the 'Add' button, with a callout box saying 'Select target users and click the "Add" button to move the users to the "Selected users" section.'

- ② Under “Sheet output order”, you can configure the output order of sheets, whether to allow copying, and whether to allow repetition.

Edit Report Definition

## Quotation

Save Cancel

Basic Settings **Sheet output order** Mapping PDF Security

Selectable sheet

\*Sheet1

>>

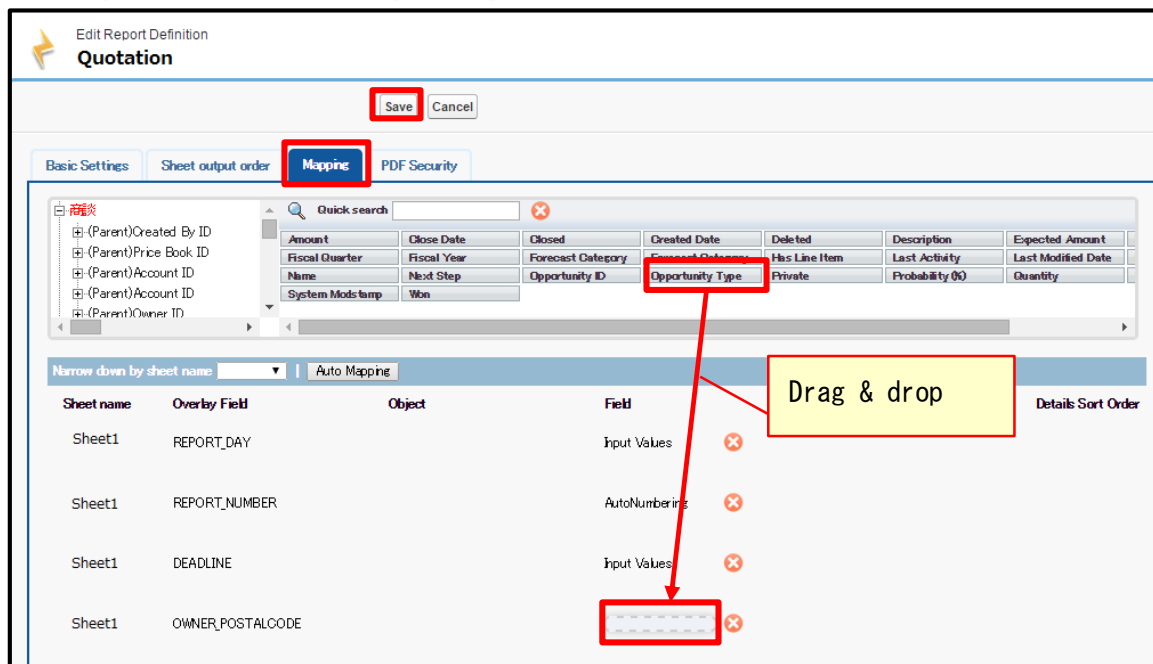
Selected sheet

| Repetition               | Copy                     | Sheet name | Margin sheet |
|--------------------------|--------------------------|------------|--------------|
| Copy                     | Copy                     |            |              |
| Repeat                   | Repeat                   |            |              |
| Sheet2                   | Sheet2                   |            |              |
| Terminate the repetition | Terminate the repetition |            |              |
| Terminate the copy       | Terminate the copy       |            |              |
| Repetition               | Copy                     | Sheet name | Margin sheet |

Repetition and copy settings

- ③ Under “Mapping”, drag & drop the Salesforce’s items that you wish to insert.

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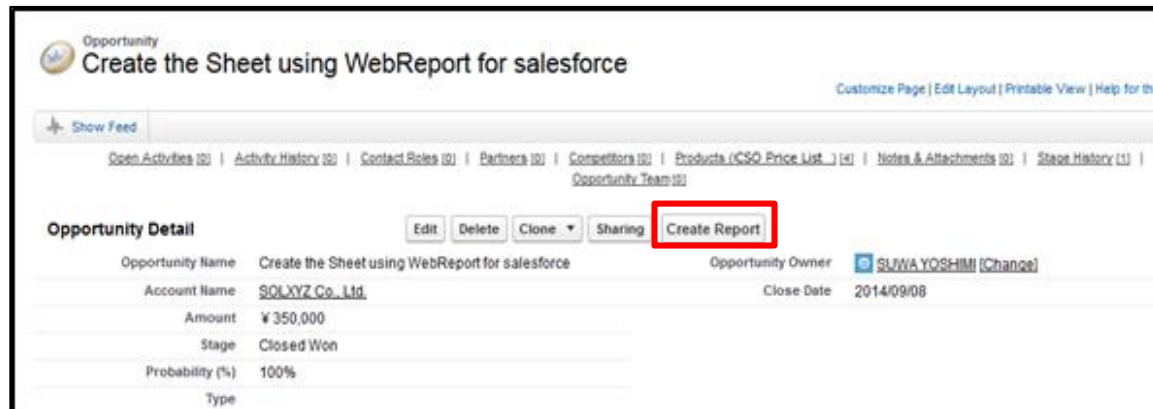


After configuring the report definition, click the “Save” button to register.

### 2.6 Report Creation

After registering overlays and report definitions, now let's try to create a report.

Go to your targeted object, select your targeted record, and click the “Create Report” button.



Select a report definition and a save directory, then click the “Save” button to create.

Opportunity  
New products for 2014

Click the "Save" button to create your reports

Save

Items whose value is already set by the report output rule.

Report Definition  
Quotation and order form\_sobxyz

Report Name  
Quotation and Orderform\_2015-10-04-07-29-50

File format  
PDF  
EXCEL -- 1 page 1 sheet

Save Space  
ECM Space  
Add on the CSO Related list when exporting.  
Document Folders  
Notes & Attachments  
Activity Plan

User Input  
The date of issue

Cloud Shared Office

Estimate date: 9/20/14  
Estimate number: E-00000007  
Expiration date: 9/30/14

Quotation

Select a created Report Definition

Address  
〒10000  
NYNew York111 Sobxyzway 99th street Sobxyz Bld. 7F

Client name  
ISHIBE semiconductor. Co, Ltd

SOLXYZ Co., Ltd  
〒108-0014  
Tokuei Bldg, 9F, 5-33-7, shiba, Minato-ku, Tokyo, Japan  
TEL: +81-3-6722-5011  
FAX: +81-3-6722-5021  
Person in charge: Naoki Motosato

We would like to estimate as follows.  
Contract period: 10/01/14 ~ 09/30/15  
Destination bank: MIZUHO BANK,LTD. SHINBASHI CHUOU BRANCH  
Account number: 051-1179149  
Account Holder: SOLXYZ Co., Ltd.

Payment method: Lump-sum payment/Transfer in cash  
Payment terms: Cut off: End of a month/Payment: End of the next month

Total order amount: ￥ 2,280,000

| Item code    | Item name                                  | Item price | Item count | Months | Amount    |
|--------------|--------------------------------------------|------------|------------|--------|-----------|
| GECSMF-100G  | ECM for Salesforce 100GB                   | ¥ 50,000   | 1          | 12     | ¥ 600,000 |
| GPDFVM       | ECM PDF Watermark option                   | ¥ 40,000   | 1          | 12     | ¥ 480,000 |
| GOUTFILE     | WebReport File Publication options         | ¥ 50,000   | 1          | 12     | ¥ 600,000 |
| GWRSF-P-Mini | WebReport for Salesforce Professional Mini | ¥ 50,000   | 1          | 12     | ¥ 600,000 |

## 2.7 Enable WebReport for Users ~How to enable WebReport for each individual~

Enable WebReport for users using CSO WebReport for Salesforce. In this section, steps for enabling WebReport for each individual are introduced.

Go to Salesforce Settings >> Manage Users >> Users, select a specific user to go to the corresponding User Detail page, check the box beside "Activate WebReport" in Cloud Shared Office items, and click the "Save" button.

▼ Cloud Shared Office

|                                  |                                     |                              |                                     |
|----------------------------------|-------------------------------------|------------------------------|-------------------------------------|
| Yomi(Last)                       | SUWA                                | ECM Profile Name             |                                     |
| Yomi(First)                      | YOSHIMI                             | ECM Active                   | <input checked="" type="checkbox"/> |
| Home Space                       | SUWA YOSHIMI                        | Lock                         | <input type="checkbox"/>            |
| ECM Chatter                      | <input checked="" type="checkbox"/> |                              |                                     |
| Used Disk                        | 2.54 MB                             | Available Disk               | 5 Space(GB)                         |
| Used Delivery                    | 0 Byte                              | Available Delivery           | 5 Size(GB)                          |
| Activate Disk Space Threshold    | <input type="checkbox"/>            | Disk Space Threshold         |                                     |
|                                  |                                     | Disk Space Threshold Unit    |                                     |
| Activate Delivery Size Threshold | <input type="checkbox"/>            | Delivery Size Threshold      |                                     |
|                                  |                                     | Delivery Size Threshold Unit |                                     |
| Activation Start Date            |                                     | Activation End Date          |                                     |
| Activation Start Time            |                                     | Activation End Time          |                                     |
| Activate WebReport               | <input checked="" type="checkbox"/> |                              |                                     |

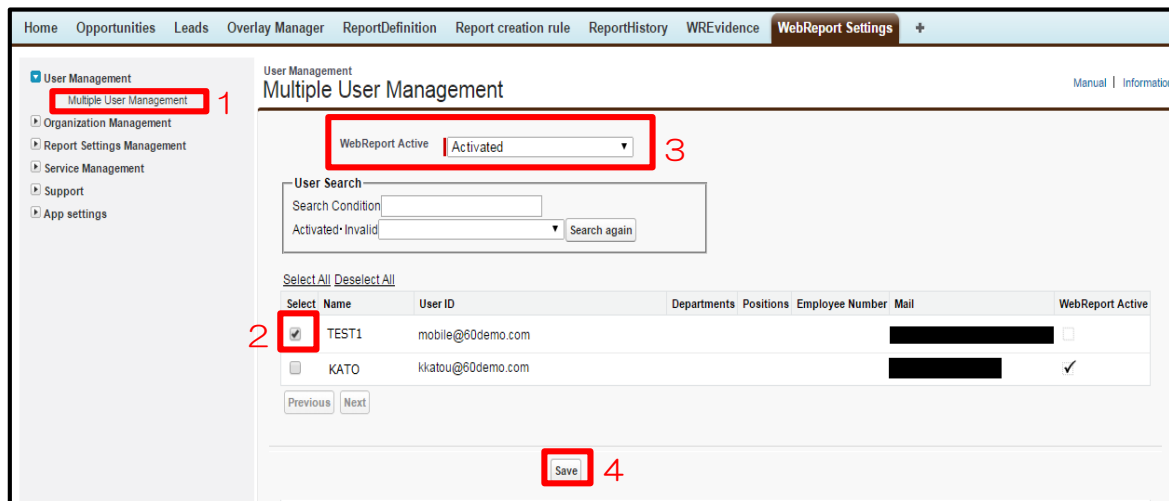
## 2.8 Enable WebReport for Users ~How to batch enable WebReport for multiple users~

Enable WebReport for users using CSO WebReport for Salesforce. In this section, steps for batch

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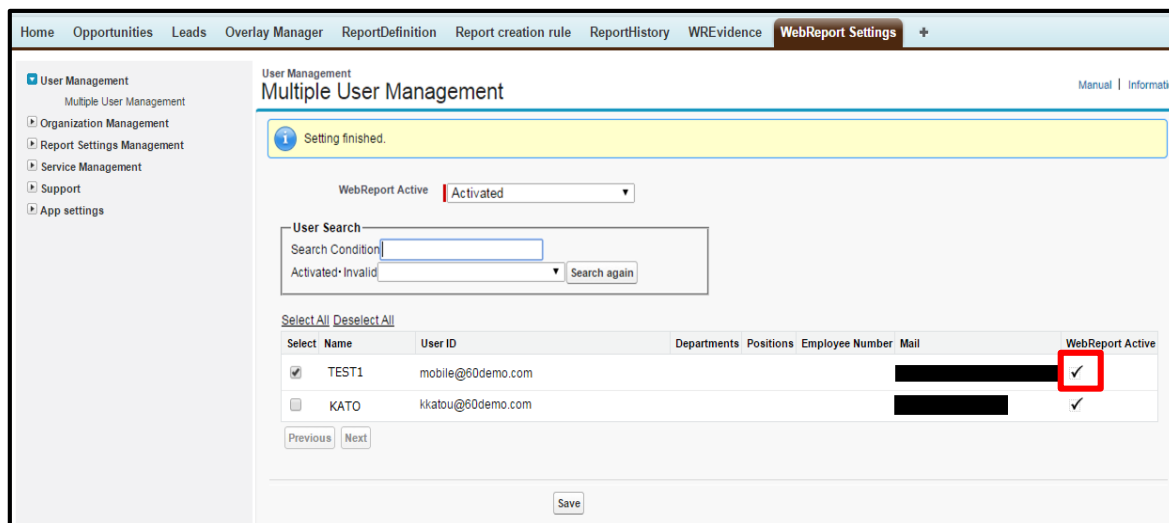
enabling WebReport for multiple users are introduced.

Go to WebReport Settings >> User Management >> Multiple User Management, check the users that you wish to enable WebReport for, then select “Activated” from the drop-down list beside “WebReport Active”, and click the “Save” button.



| Select                              | Name  | User ID           | Departments | Positions | Employee Number | Mail | WebReport Active                    |
|-------------------------------------|-------|-------------------|-------------|-----------|-----------------|------|-------------------------------------|
| <input checked="" type="checkbox"/> | TEST1 | mobile@60demo.com |             |           |                 |      | <input type="checkbox"/>            |
| <input type="checkbox"/>            | KATO  | kkatou@60demo.com |             |           |                 |      | <input checked="" type="checkbox"/> |

Confirm that WebReport has been activated by checking if the boxes under “WebReport Active” is checked.



| Select                              | Name  | User ID           | Departments | Positions | Employee Number | Mail | WebReport Active                    |
|-------------------------------------|-------|-------------------|-------------|-----------|-----------------|------|-------------------------------------|
| <input checked="" type="checkbox"/> | TEST1 | mobile@60demo.com |             |           |                 |      | <input checked="" type="checkbox"/> |
| <input type="checkbox"/>            | KATO  | kkatou@60demo.com |             |           |                 |      | <input checked="" type="checkbox"/> |

## 2.9 Usage Notification

By setting a threshold to your organization’s output page number, notification e-mails can be sent to administrators when the threshold is reached.

Go to WebReport Settings >> Organization Management >> Usage Notification, and click the “Edit” button.

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Home Opportunities Leads Overlay Manager ReportDefinition Report creation rule ReportHistory WREvidence WebReport Settings

User Management  
Organization Management  
Usage notification  
Organization Information  
Report Settings Management  
Service Management  
Support  
App settings

Organization Management  
Usage notification

Edit

Enable

Created By SUWA YOSHIMI Date Created 2014/10/23 18:09:07  
Modified By system Date Modified 2014/11/05 12:21:36

Check the box beside “Enable”.

Click the “Add” button to add users for notification.

Home Opportunities Leads Overlay Manager ReportDefinition Report creation rule ReportHistory WREvidence WebReport Settings +

User Management  
Organization Management  
Usage notification  
Organization Information  
Report Settings Management  
Service Management  
Support  
App settings

Organization Management  
Usage notification

Save Cancel

Enable

Created By SUWA YOSHIMI Date Created 2014/10/23 18:09:07  
Modified By system Date Modified 2014/11/05 12:21:36

Contract course name Number of contracts Maximum number of pages  
DEMO 1 100000

Notification

| Name | User ID | Email | Threshold value (page) |
|------|---------|-------|------------------------|
|------|---------|-------|------------------------|

Manual | Info

Page 0 of 10

Enter a Threshold (page number), select the user to notify and click the “Select” button.

User Search

Select notification email recipients.

Username Search

Threshold value (page) 1000

| Name            | User ID              | Email |
|-----------------|----------------------|-------|
| Motosato Naoki  | admin@csodf14.com    |       |
| Brown David     | david@csodf14.com    |       |
| Ishibe Jiro     | jiro@csodf14.com     |       |
| Smith John      | john@csodf14.com     |       |
| Williams Linda  | linda@csodf14.com    |       |
| Jenkins Maria   | maria@csodf14.com    |       |
| Taylor Patricia | patricia@csodf14.com |       |
| Naoki Hanako    | hanako@csodf14.com   |       |

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Select Cancel

Click the “Save” button to register.

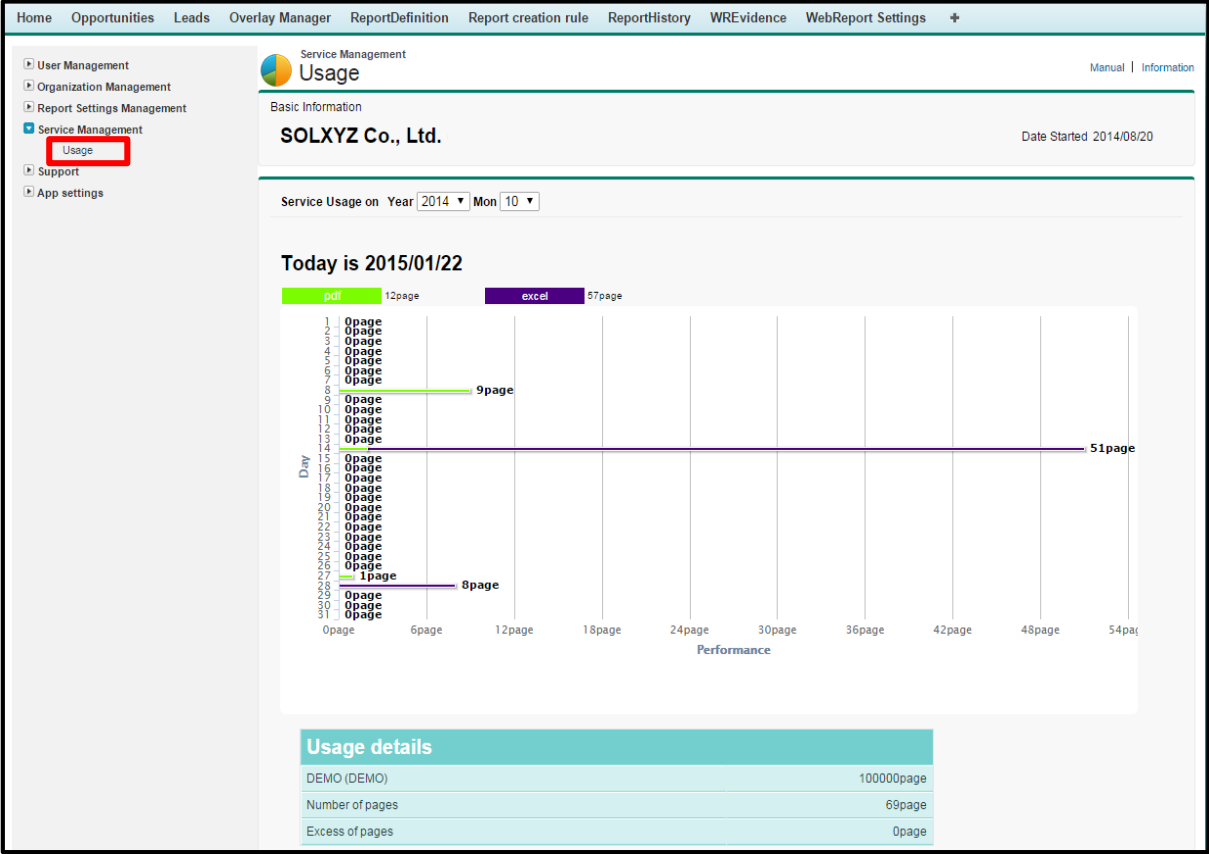
The screenshot shows the 'Usage notification' configuration page in the CSO WebReport for Salesforce. The left sidebar contains a navigation menu with options like User Management, Organization Management, Report Settings Management, Service Management, Support, and App settings. The main content area is titled 'Usage notification' and includes a 'Save' button (highlighted with a red box) and a 'Cancel' button. Below these buttons, there is a section for enabling notifications with a checkbox labeled 'Enable' which is checked. This section also displays metadata: Created By (SUWA YOSHIMI), Modified By (system), Date Created (2014/10/23 18:09:07), and Date Modified (2014/11/05 12:21:36). A table lists contract course names with columns for 'Contract course name', 'Number of contracts', and 'Maximum number of pages'. The table contains one entry: 'DEMO' with 1 contract and a maximum of 100,000 pages. Below this, there is a 'Notification' section with a table listing users. The table has columns for 'Name', 'User ID', 'Email', and 'Threshold value (page)'. It contains one entry: 'SUWA YOSHIMI' with User ID 'yosuwaga@60demo.com' and a threshold of 100 pages. At the bottom, there is a pagination bar showing 'Page 1 of 1' and a 'View 1 - 1 of 1 Showing 1' status.

## 2.10 Check Usage Status

You may check your monthly used page number in CSO WebReport for Salesforce. Administrators may also check the contracted page number and whether this number has been exceeded.

Go to WebReport Settings >> Service Management >> Usage

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3 In the End

Up to this point is the basic setup for enterprises to use CSO WebReport for Salesforce. For detailed instructions on creating overlay, a report design guide will be released soon.

## CSO WebReport for salesforce Simple Setup Guide

### Revision History

| Revision Date | Version | Contents of Revision | Reason for Revision                                                                              | Reviser |
|---------------|---------|----------------------|--------------------------------------------------------------------------------------------------|---------|
| 2015/10/5     | 1.0     | Newly created        | Newly created<br>Created the Simple Setup Guide for Cloud Shared Office WebReport for Salesforce | Suwa    |