



Report Launch for Salesforce.com Post Install Steps

Local Folder Setting if blanks - show all report you have access to and if specified, show reports under that

1. Open the Static Resources page and open the reportlaunchsettings resource.
2. Click View file to initiate a download.
3. Open the Data Import Wizard page and click Launch Wizard!
4. In the wizard section Choose data, under “What kind of data are you importing”, select the Custom objects tab and select Settings.
5. The next step, under “What do you want to do”, select Add new records, and leave the default settings.
6. The next step, under “Where is your data located”, select the CSV button and click Choose File to reveal an open dialog.
7. In the open dialog, navigate to where the reportlaunchsettings resource was saved, select the file named reportlaunchsf_reportlaunchsettings, and click Open.
8. The wizard can now proceed after clicking Next.
9. In the wizard section Edit mapping, confirm that each CSV Header has a corresponding Mapped Salesforce Object and then click Next.
10. In the wizard section Start Import, click Start Import to proceed.
11. The next step is to edit the Default settings by clicking the Settings tab, and View all.
12. Click Edit and modify the following fields:
 - a. Copy the protocol + fqdn + / of the org into the Local Server text field and replacing its existing value. (E.g. <https://foo.my.salesforce.com/>)
 - b. Repeat step a for the New Button URL text field, but only append to the left of the existing value.
 - c. Copy the Flex Monster license of the org into the Pivot Table License Key text field.
 - d. Click Save.
13. The final step is to add a Remote Site Settings for the org by clicking New Remote Site.
14. Give it a descriptive Remote Site Name, and copy the protocol + fqdn of the org into the Remote Site URL text field.
15. Make sure Active is checked before clicking Save.

A sample CSV file can be found in the static resources labelled “reportlaunchsettings”. This can be used when running the Data Import Wizard to populate the Report Launch Settings object for the current user. Alternatively, the CSV file can be manually created based on the following specifications:

Setting Detail

Save Cancel

LaunchWorks Setting Name	Default	New Button URL	https://reportlaunch2-dev-ed.my.salesforce.com/...
External Server	https://trial.launchworks.com/	Local Server	https://reportlaunch2-dev-ed.my.salesforce.com
Authentication Type	Federation ID	Local Report Folder	
AppName		License Key	2W3A-2H11- 1-0R1C-0R07-1K1U-0012-301F-1W2D-
External Report Folder			

Save Cancel

Row 1: (column names)	Row 2: (column values)	Notes
Name	Default	Must be "Default".
AppName	launch	Used for BI Platform
Authentication Type	Federation ID	Used for BI Platform
External Report Folder	Sample	Used for BI Platform
External Server	https://trial.launchworks.com/	Used for license server Must end with a /
Local Report Folder		Blank shows all reports
Local Server	https://host.salesforce.com	Deployed org fqdn
New Button URL	reportbuilder/reportType.apexp	Can be fqdn or relative path
License Key	***	Needs a key access

* Items with highlight denote required fields.

*** Org admin needs to request domain specific key from Flex Monster customer support