

MotionBoard Cloud for Salesforce Startup Manual for Administrators

Version 4.3
May 1st, 2017

Introduction

Thank you for signing up for the "MotionBoard Cloud for Salesforce" of WingArc1st Co., Ltd. In this startup manual, we will explain the initial setup procedures required for using the service. Please read it before use.

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About the Startup Manual

This manual describes the steps to use the Cloud BI dashboard "MotionBoard Cloud for Salesforce", which allows you to use data in a variety of business scenarios based on the data accumulated in Salesforce.

In addition, you can regulate the connection of Salesforce with MotionBoard by each user. This manual also describes the steps to set up the MotionBoard Cloud for Salesforce operation permission and how to use data storage.

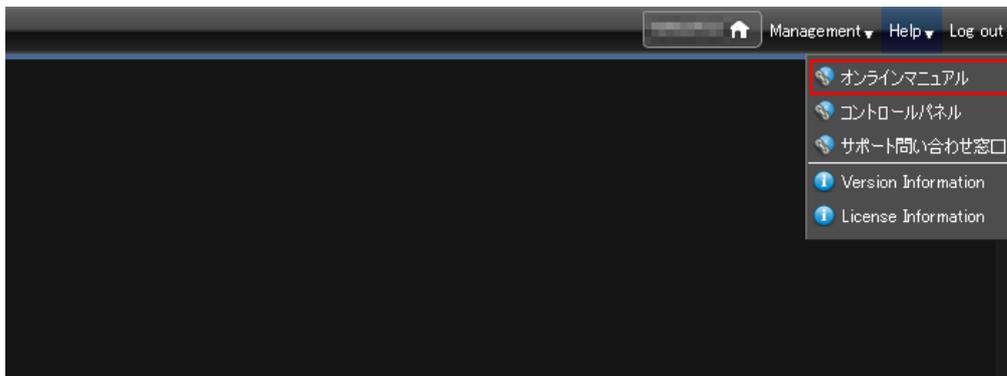
About MotionBoard Cloud for Salesforce Manual

MotionBoard Cloud for Salesforce has online manuals available.

- How to access

Click the **Help - Online Manual** in the upper right corner of the MotionBoard Cloud for Salesforce screen.

* For the convenience of session management, you cannot view manuals in different browsers. Also, if MotionBoard Cloud for Salesforce is not running, you will not be able to view the manual.



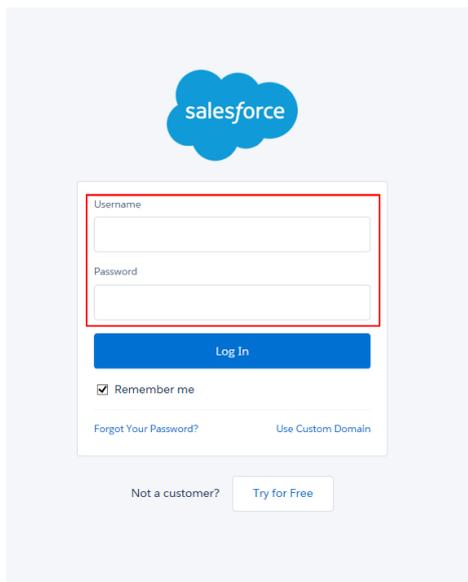
Chapter 1 How to Use the MotionBoard Cloud for Salesforce as an Administrator

1. Install MotionBoard for Salesforce

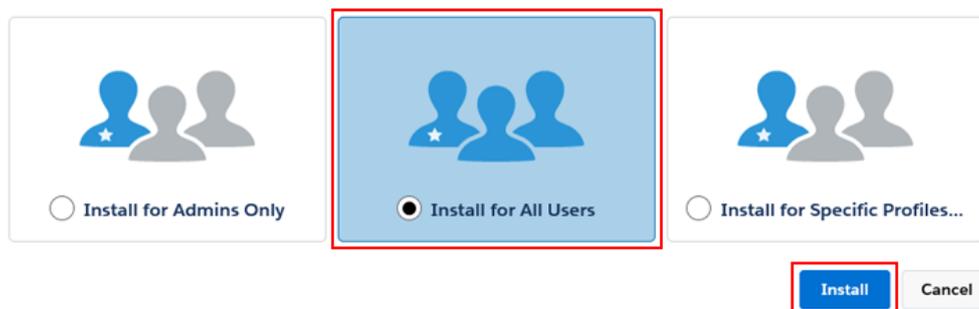
Install the MotionBoard for Salesforce in Salesforce environment.

1. Access the package installation URL via web browser and log in to Salesforce.

(The URL for the package installation is the installation URL of the MotionBoard for Salesforce installation information (1) in the Guidance material "How to start using the service (or trial)", which has been sent to you.)



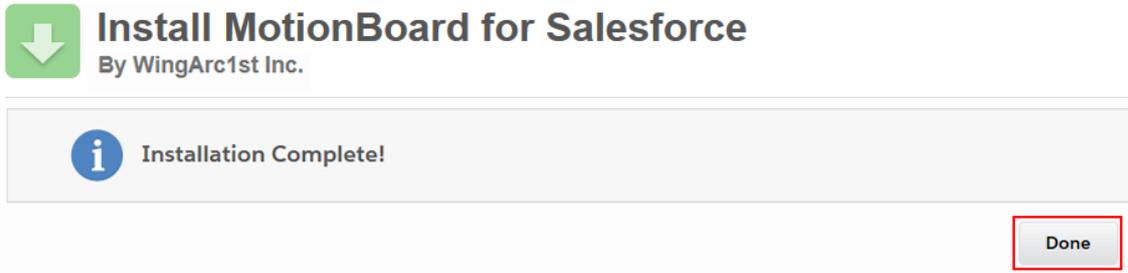
2. Enter the password in the package installation screen.
(The password is the package installation password for the MotionBoard for Salesforce installation Information (2) in Guidance material "How to start using the service (or trial)", which has been sent to you.)
3. Change the installation target to **Install for All users** and click **Install**.



*** Note**

In some Salesforce environments, when you perform an installation, an email is sent to the system administrator. If an email is sent, see "Reference: How to change the MotionBoard for Salesforce settings URL".

- When **Installation Complete!** message is displayed, click **Done**.

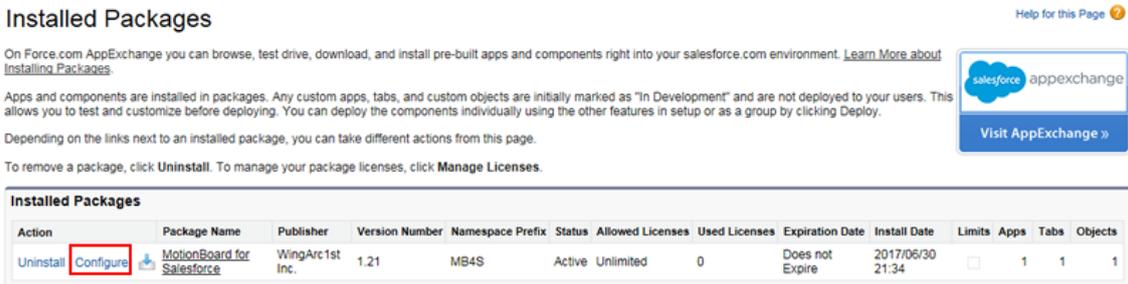


Install MotionBoard for Salesforce
By WingArc1st Inc.

Installation Complete!

Done

- On the **Installed Packages** screen, click **Configure** in **MotionBoard for Salesforce**.



Installed Packages

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

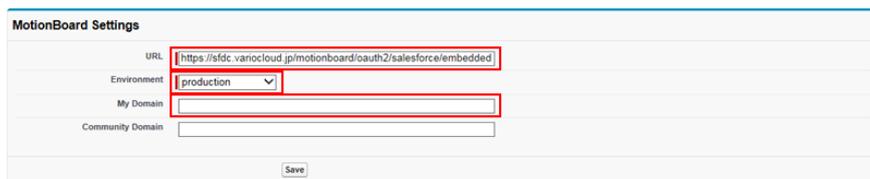
Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects
Uninstall Configure	MotionBoard for Salesforce	WingArc1st Inc.	1.21	MB4S	Active	Unlimited	0	Does not Expire	2017/06/30 21:34		1	1	1

- Set various items from the MotionBoard setting screen.
 - In **URL**, enter the MotionBoard URL for the MotionBoard for Salesforce installation Information (3) in the Guidance material "[How to start using the service \(or trial\)](#)".
 - In the **Environment**, select production for the production environment. Select sandbox for a sandbox environment
 - If you use **My Domain** in Salesforce, enter the domain name you are using for your domain name.

The domain name can be identified by **Setup - Domain Management - My Domain**.
If you are not using **My Domain**, please do not enter anything.



MotionBoard Settings

URL:

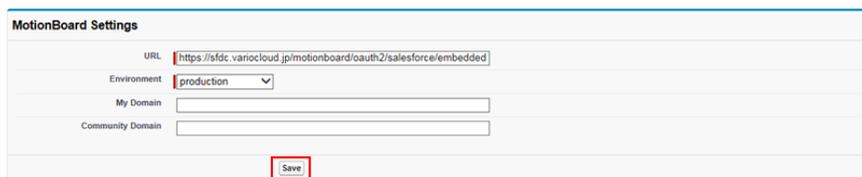
Environment:

My Domain:

Community Domain:

Save

- Click **Save**.



MotionBoard Settings

URL:

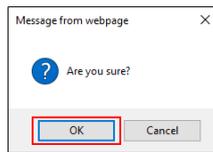
Environment:

My Domain:

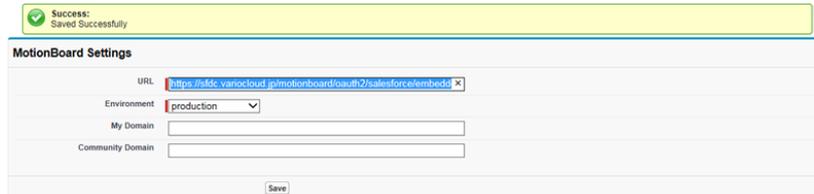
Community Domain:

Save

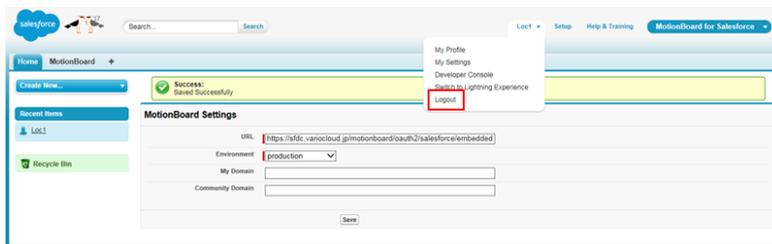
8. Click **OK**.



9. **Success: Saved Successfully.** is displayed and installation is completed.



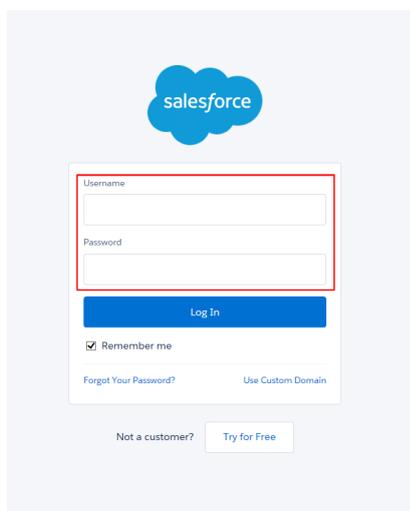
10. Click **Logout** from the **User Menu** in the top right.



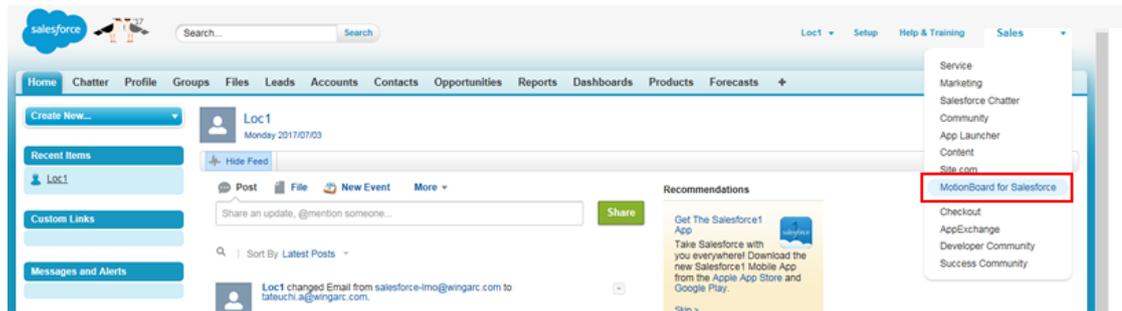
2. Login Confirmation to MotionBoard Cloud for Salesforce

* If you don't see the MotionBoard Cloud for Salesforce screen, see " Confirmation Method When You Cannot Connect to the MotionBoard Cloud for Salesforce " on Page 40.

1. Log in to Salesforce as an administrator user for MotionBoard Cloud for Salesforce.



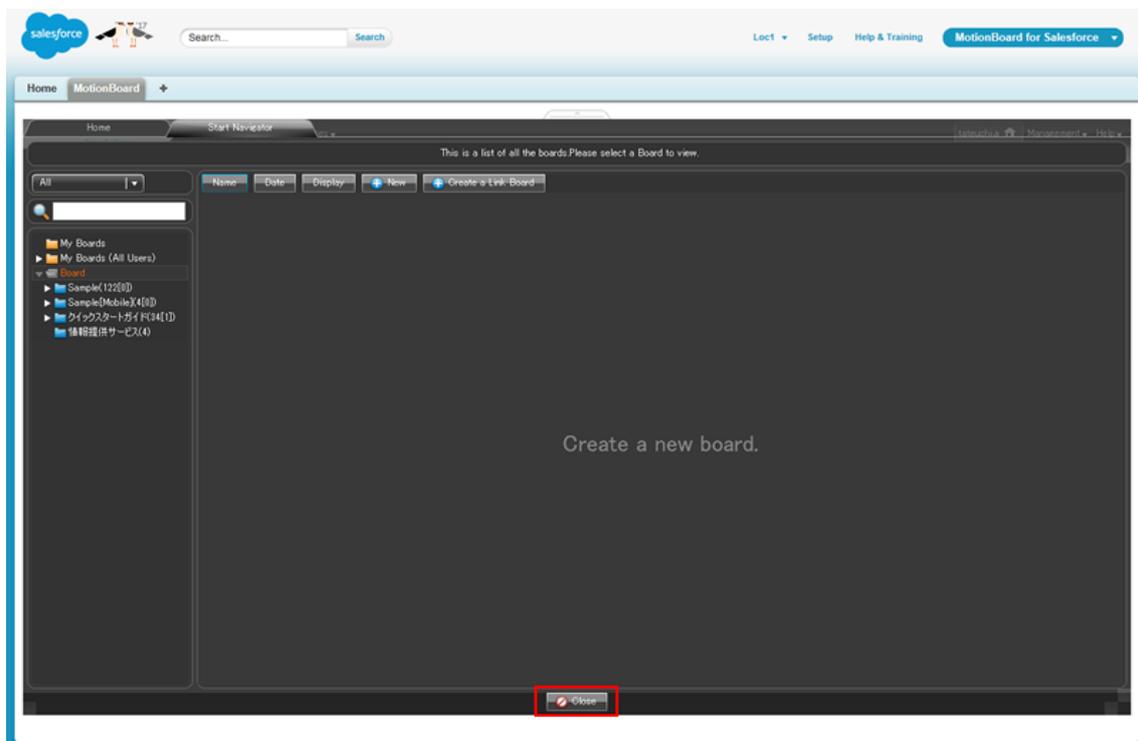
2. After you log in to Salesforce, click **MotionBoard for Salesforce** from the Force.com application menu in the top right.



3. When the pop-up appears, click the **Allow** button.

* If you don't see a popup, check the "(5) Pop-up Blocker settings" on page 27.

4. When you log in to MotionBoard for Salesforce, the start navigation screen appears. Click the **Close** button to close the start navigation screen.



5. The installation of MotionBoard Cloud for Salesforce is now complete.

Chapter 2 How to Add Users

1. How to Add Users to MotionBoard Cloud for Salesforce

We will be adding new users for MotionBoard Cloud for Salesforce.

For settings to add users, see Online manual "Administrator's Guide (MotionBoard Cloud) - MBC-Chapter 1. Setting Before Use - MBC-1-4 Specifying Available Users."

* [The online manual can be viewed from Help - Online Manual at the top right of the MotionBoard screen.](#)

2. Granting the Operation Permission for MotionBoard to users

Set the operation permission for the user added in Chapter 2.

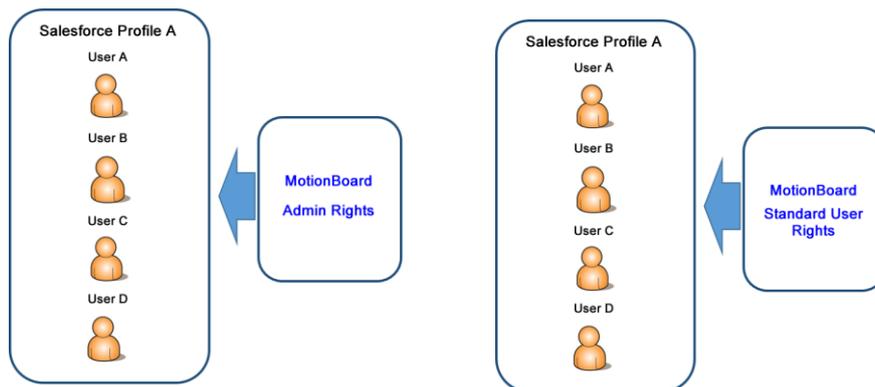
There are two different ways to set up the operation permission in MotionBoard.

*** Notes**

(1) If the Salesforce profile of the specified user you added in Chapter 2 is not "System Administrator", you must set one of the following two operation permission settings:

- ① If you want to set up one operation permission for all users who belong to the Salesforce profile

* Please see page 9 for how to set up.



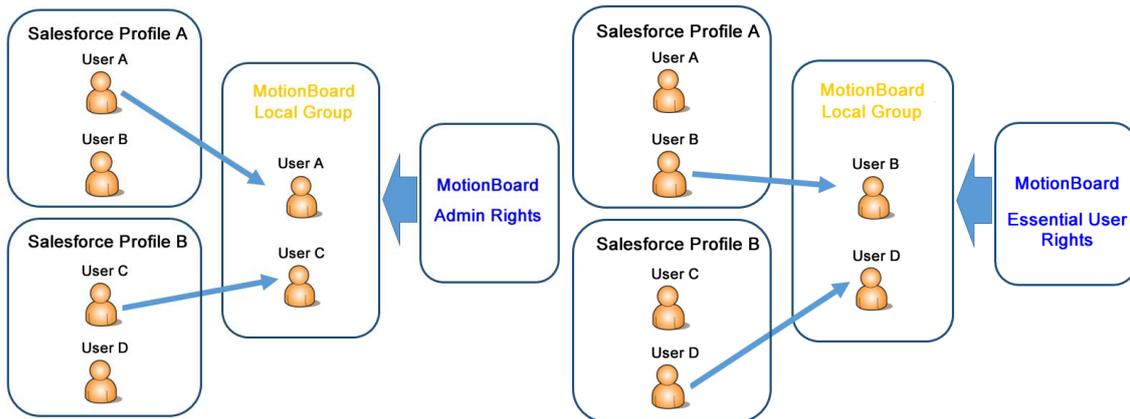
② If you want to set up a separate operation permission for users who belong to a single Salesforce profile

If you want to set up a separate operation permission for users who belong to a single Salesforce profile, create a local group in MotionBoard, assign users to local groups for each operation permission, and grant administrative rights for each local group.

* Perform this setting if the following is true.

- You have signed up for both standard and essential users.
- If you are setting more than multiple permits, such as "Board administrator" and "General user," for users who belong to a single Salesforce profile.

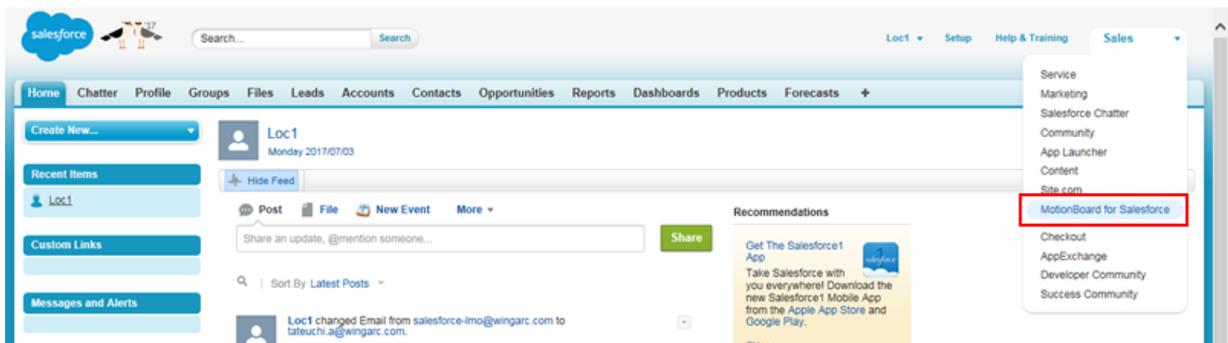
* Please see page 14 for how to set up.



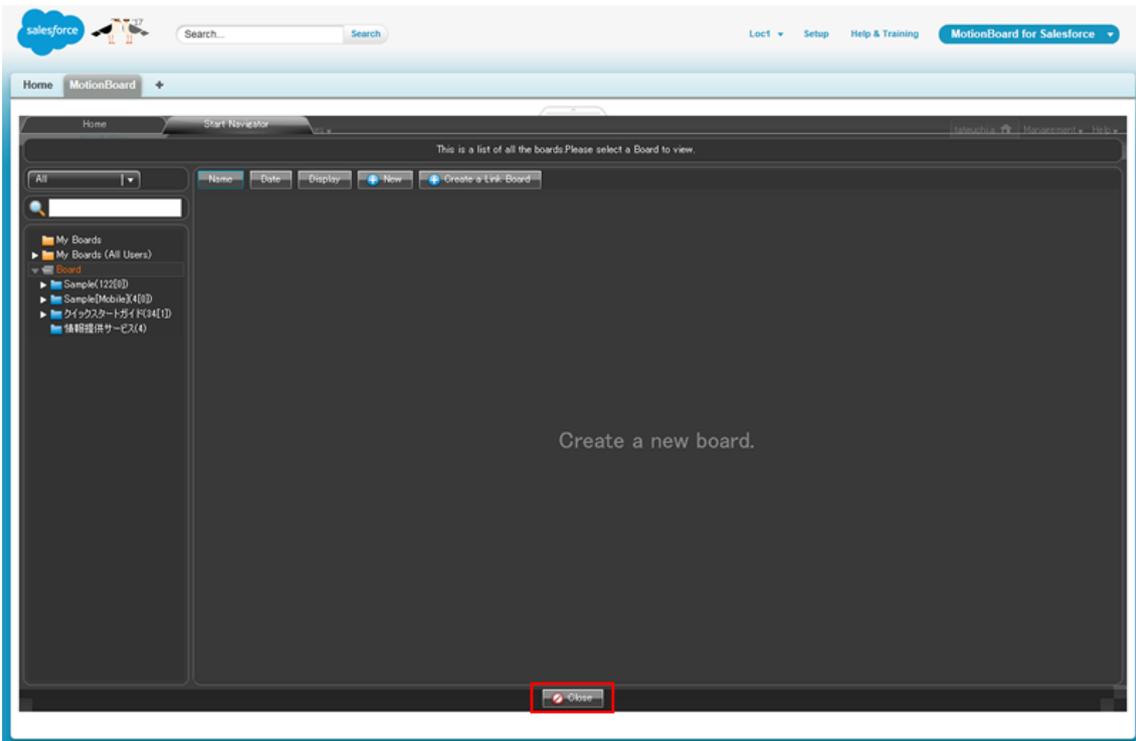
① If you want to set up one operation permission for all users who belong to the Salesforce profile

1. Connect from Salesforce to MotionBoard Cloud for Salesforce.

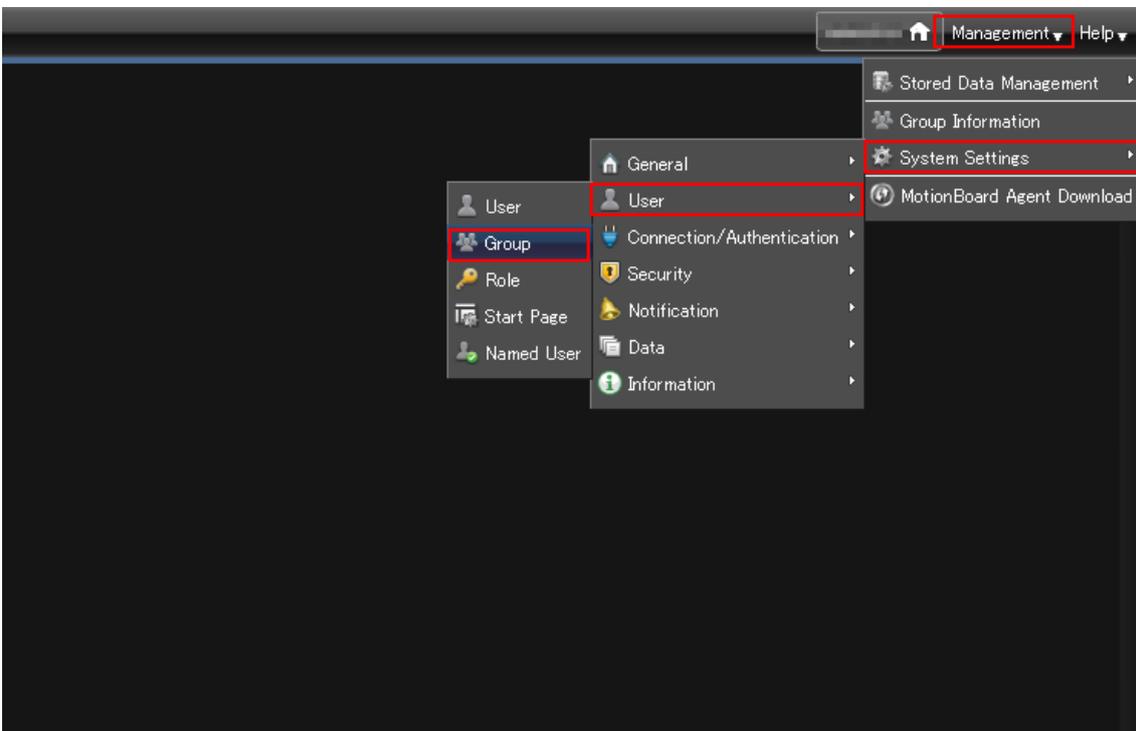
Click **MotionBoard for Salesforce** from the Force.com application menu in the upper right.



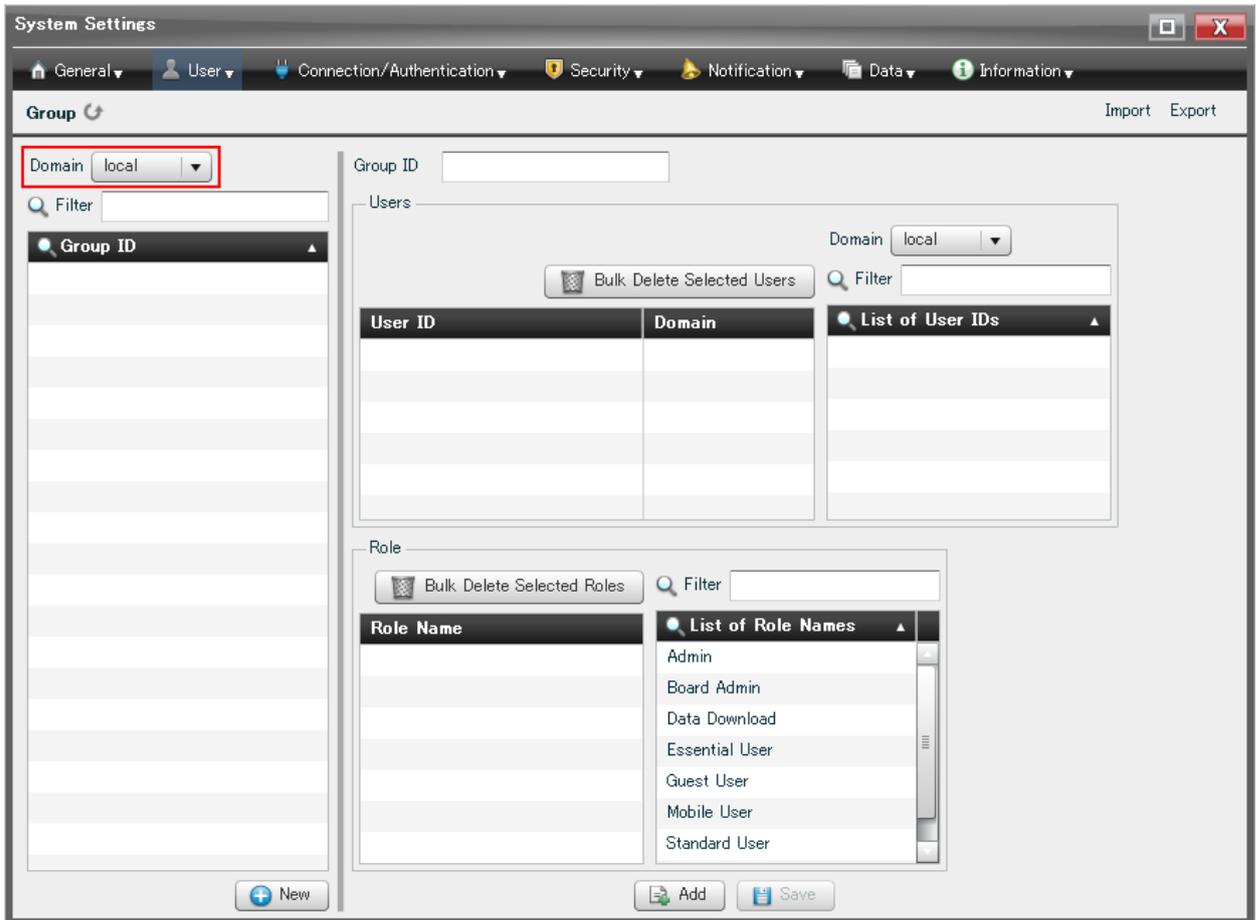
2. Click **Close** when you are prompted to start Navi MotionBoard Cloud for Salesforce.



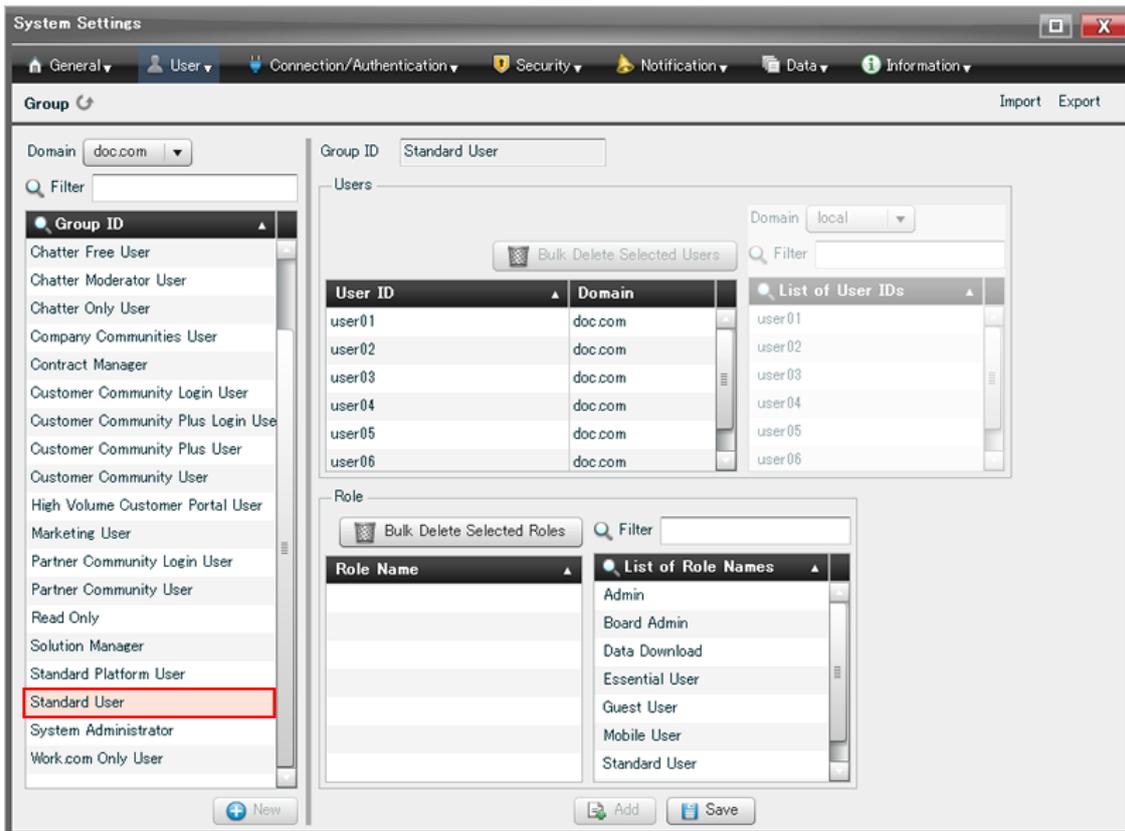
3. From **Management** in the top right, click **System Settings - User - Group**.



4. From the **Domain** combo box at the top left of the screen, select the domain you are using in Salesforce.



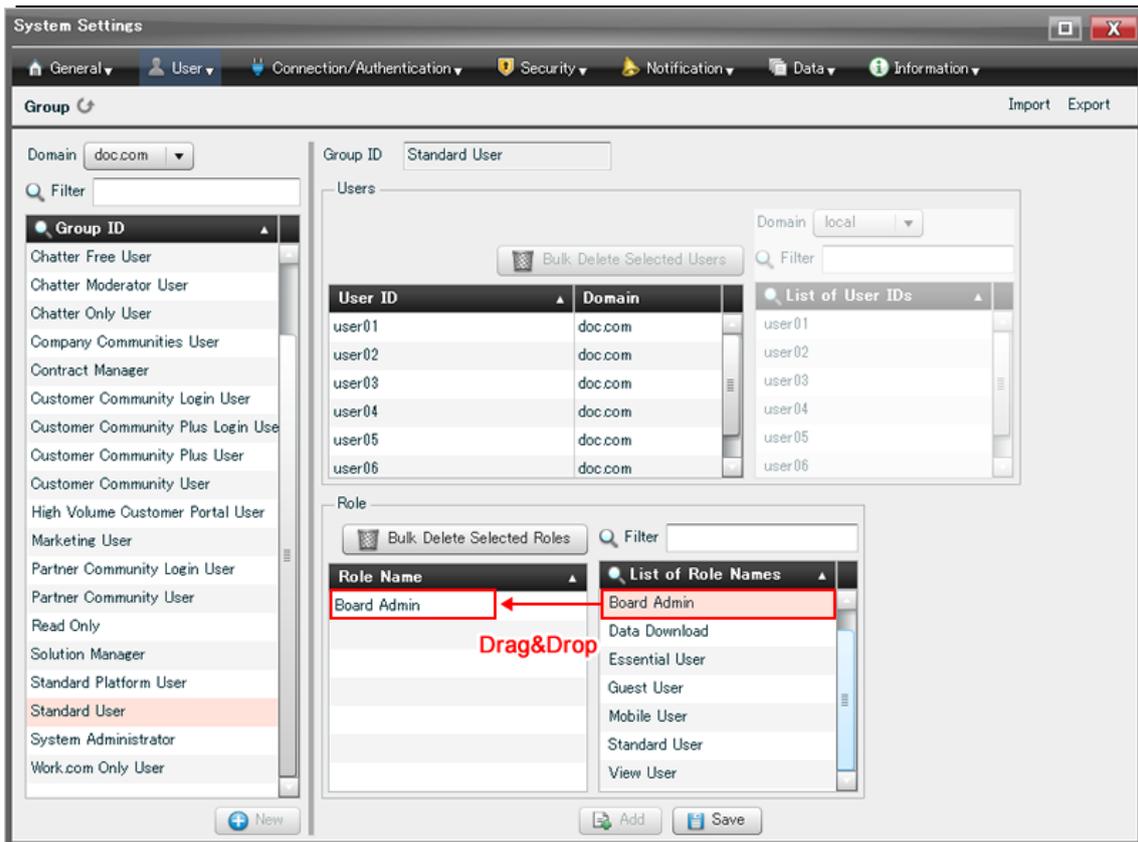
- From the **Group ID**, click the profile for which you want to set permissions.



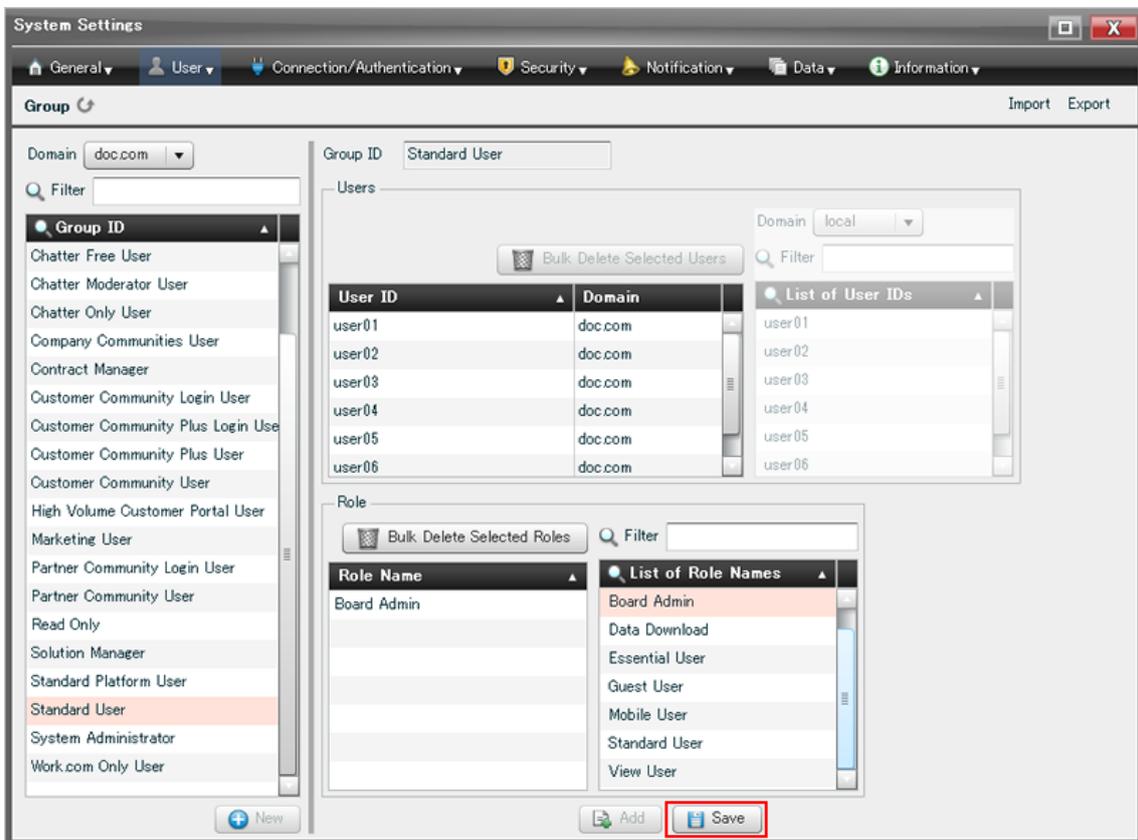
- From the **Role** at the bottom of the screen, drag and drop the role of the permission you want to set for the group.

For information about role types and permissions, see the online manual "Administrator's Guide (MotionBoard Cloud) - MBC-Chapter 1. Setting Before Use - MBC-1-6 Granting Roles (Permissions) to Groups".

* The online manual can be viewed from [Help - Online Manual](#) at the top right of the MotionBoard screen.



7. Click the **Save** button at the bottom of the screen.



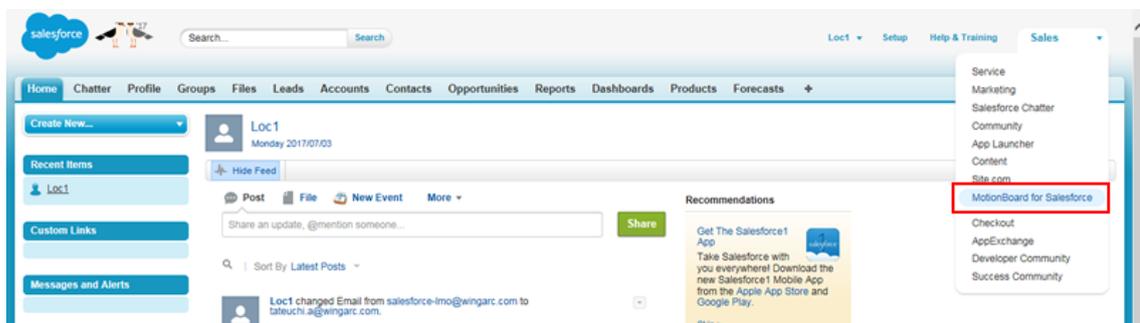
The operation permission setting is now complete for users who belong to the Salesforce profile.

② If you want to set up a different operation permission for users who belong to the same Salesforce profile

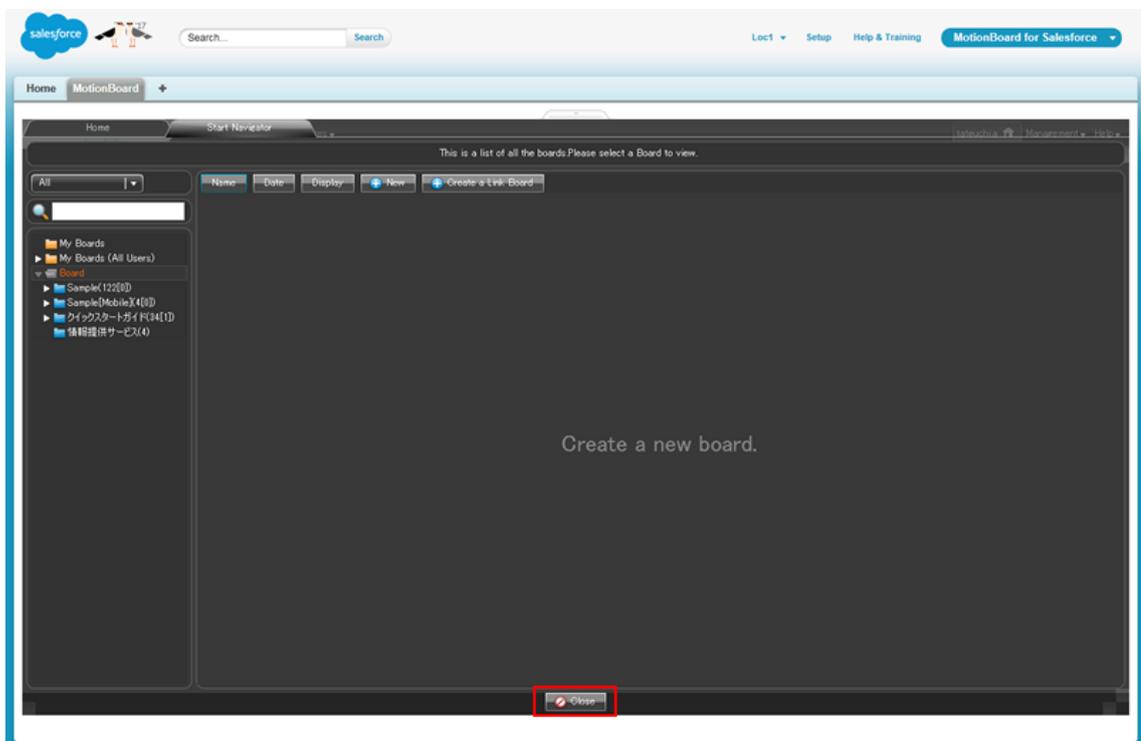
As an example, let's create a group of board administrators and essential users.

Creating board administrator groups

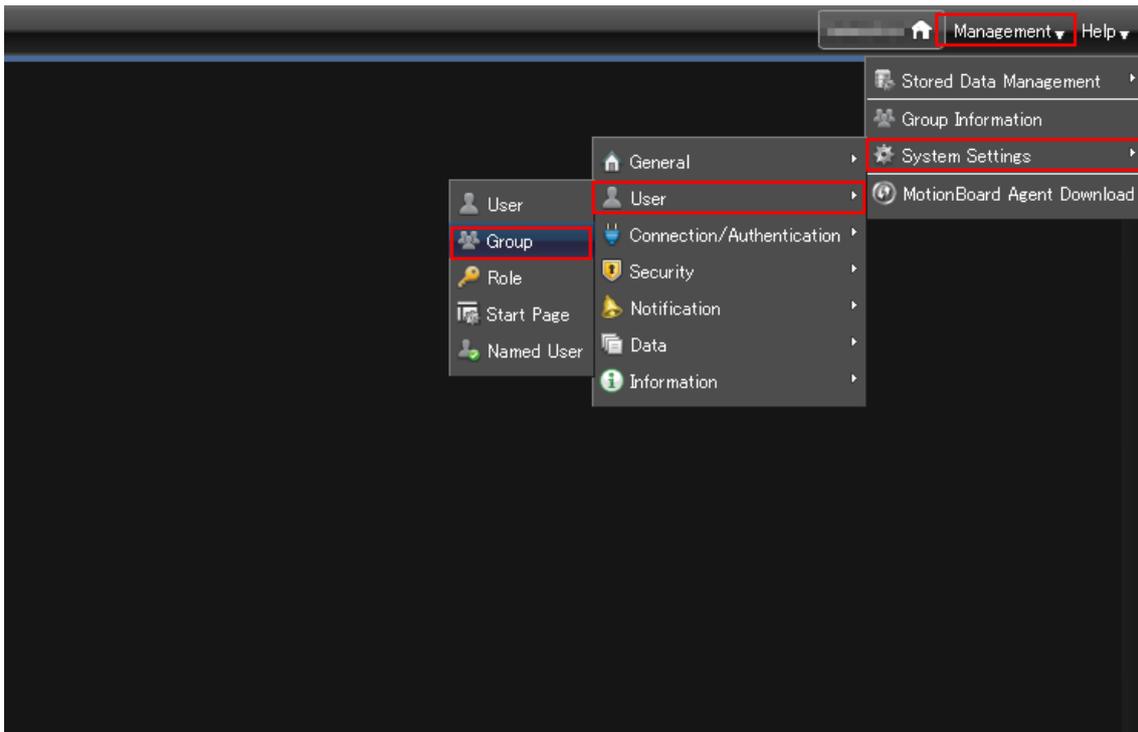
1. Connect from Salesforce to MotionBoard Cloud for Salesforce.
Click **MotionBoard for Salesforce** from the Force.com application menu in the upper right.



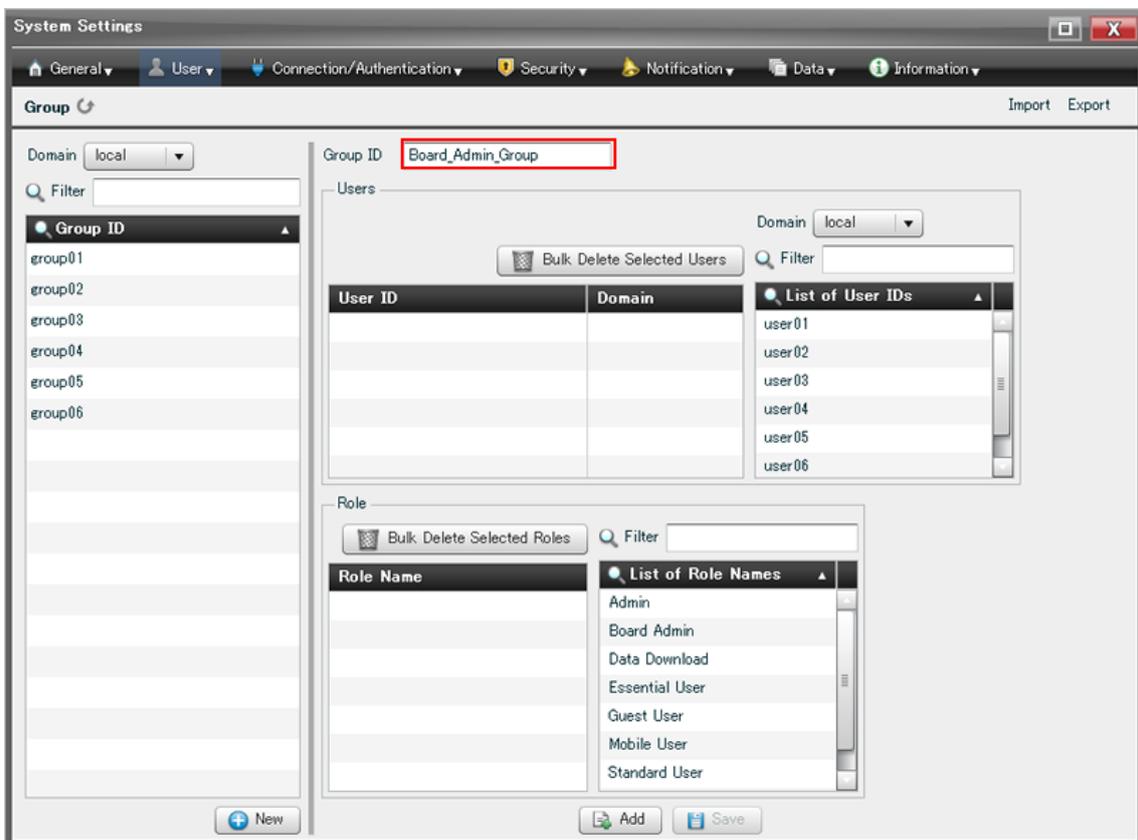
2. When the start navigation screen of MotionBoard Cloud for Salesforce appears, click the **Close** button.



3. Click **Management - System Settings - User - Group** from the upper-right corner.

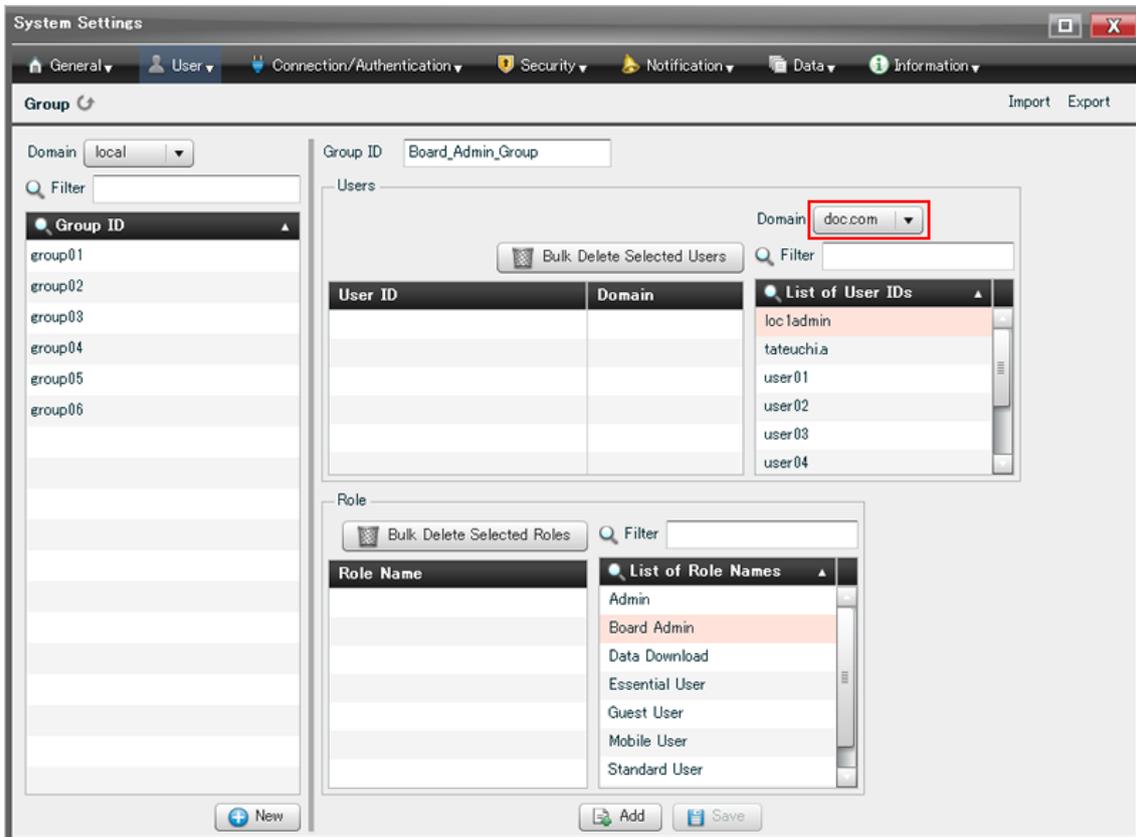


4. Type the group name for the board administrator group in **Group ID** at the top of the screen.

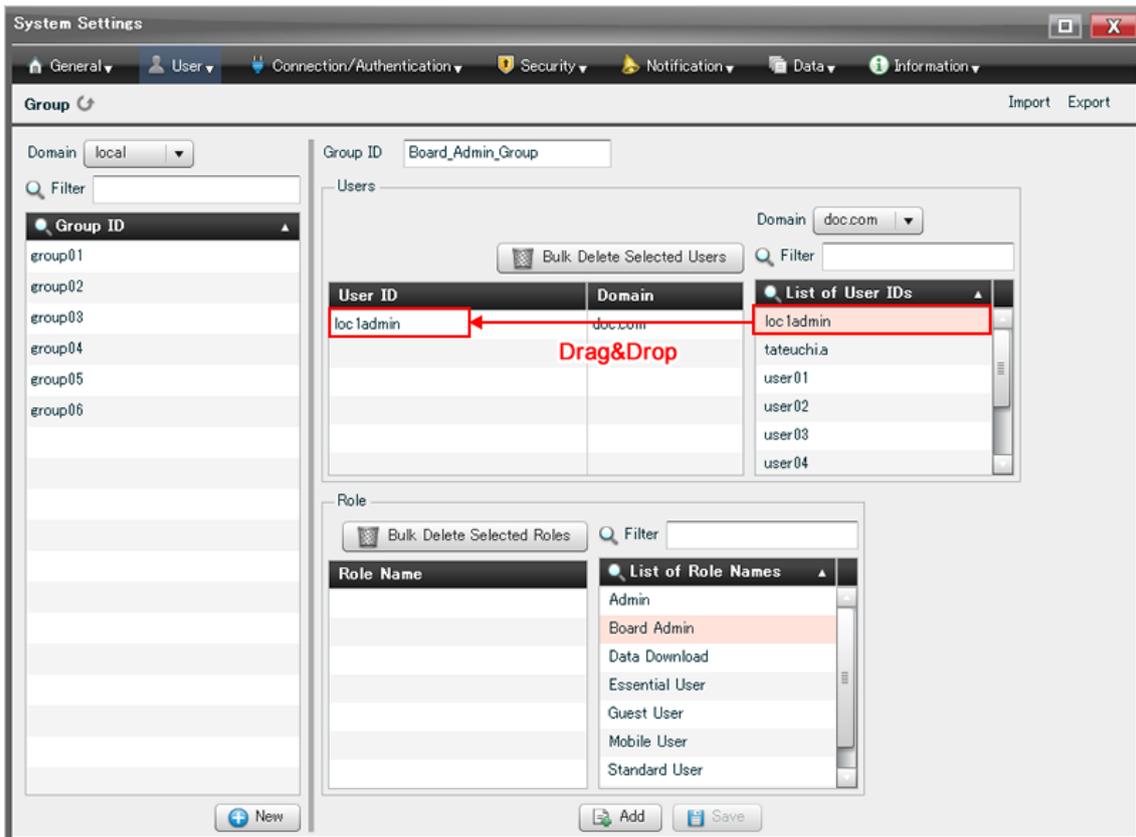


5. From **Domain** combo box, select the domain that the user in the group is using in Salesforce.

* If you do not see the domain of your user account in Salesforce, set the "How to Add MotionBoard Cloud for Salesforce Domain" section on page 38.



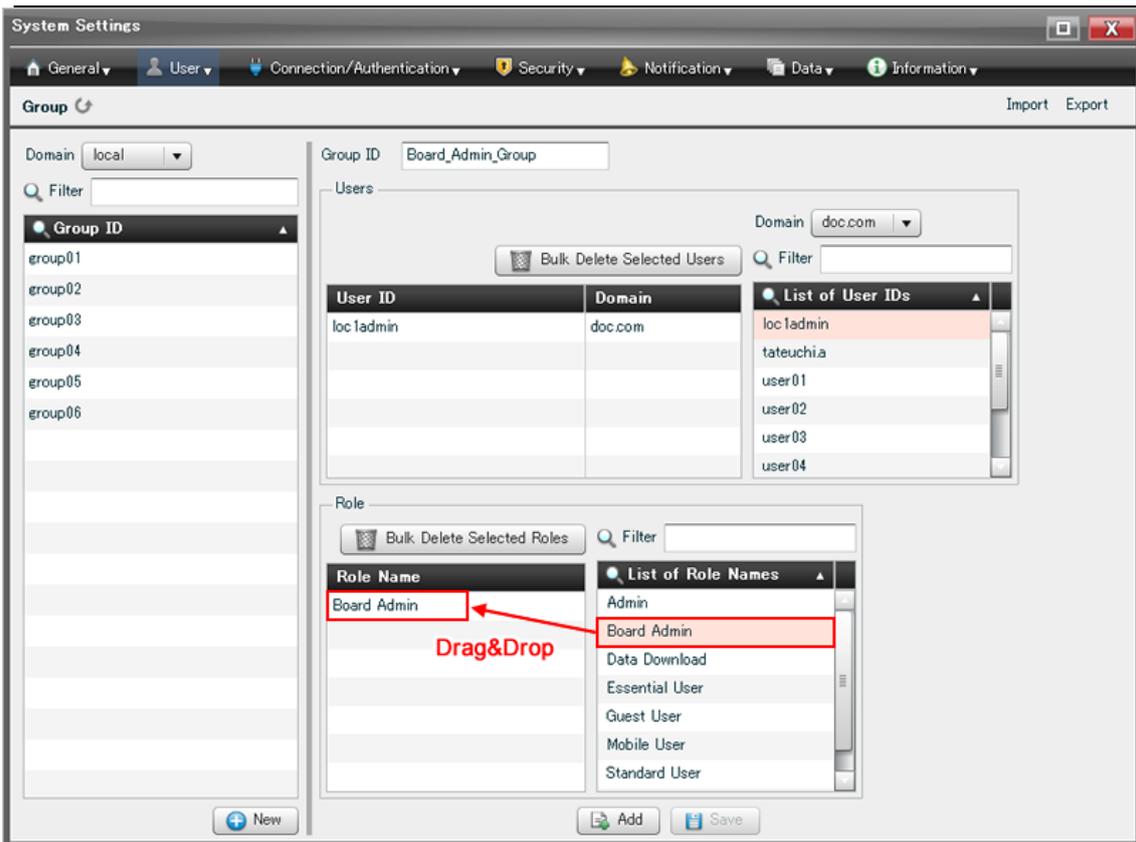
6. Drag and drop the user you want to set as a group from the **List of User IDs**.



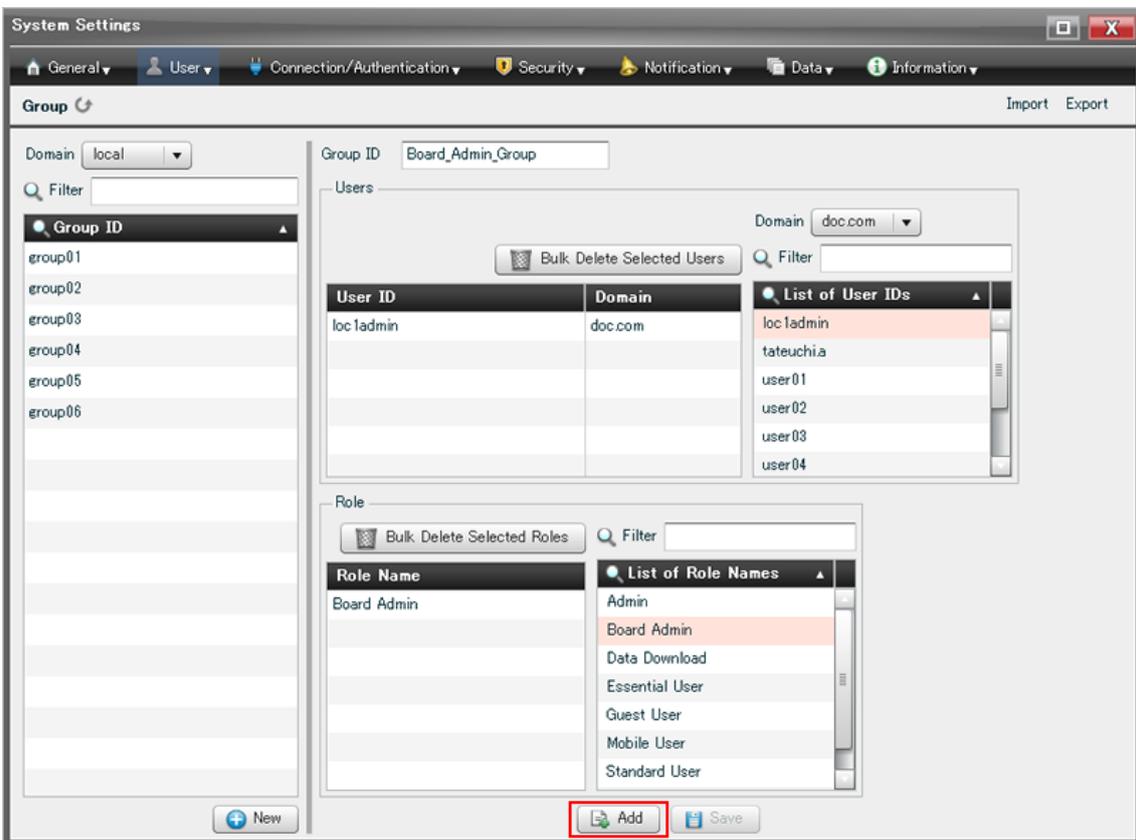
7. Drag and Drop **Board Admin** from the Role Name list in the role settings item at the bottom of the screen.

For information about role types and permissions, see the online manual "Administrator's Guide (MotionBoard Cloud) - MBC-Chapter 1. Setting Before Use - MBC-1-6 Granting Roles (Permissions) to Groups."

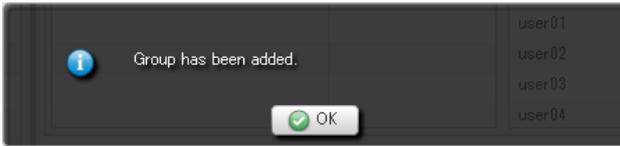
* The online manual can be viewed from [Help - Online Manual](#) at the top right of the MotionBoard screen.



8. When you are finished setting up the role, click the **Add** button.

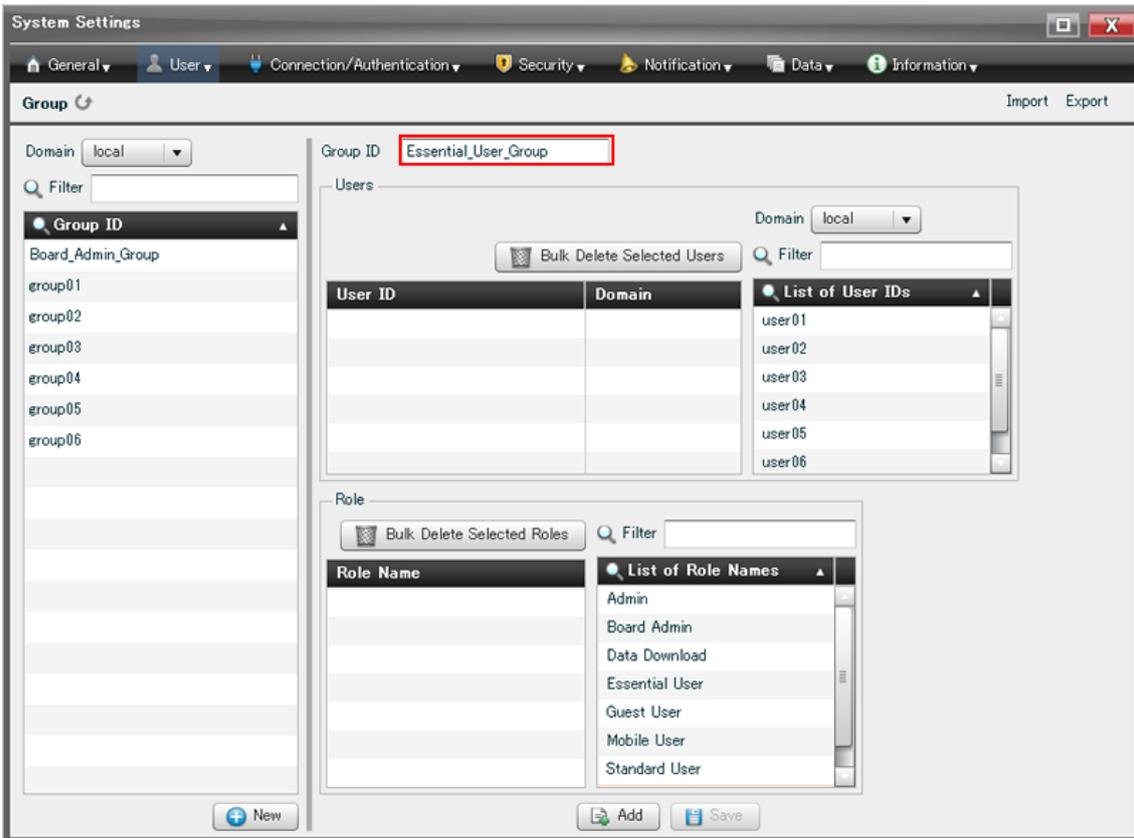


- Click the **OK** button in the dialog box.



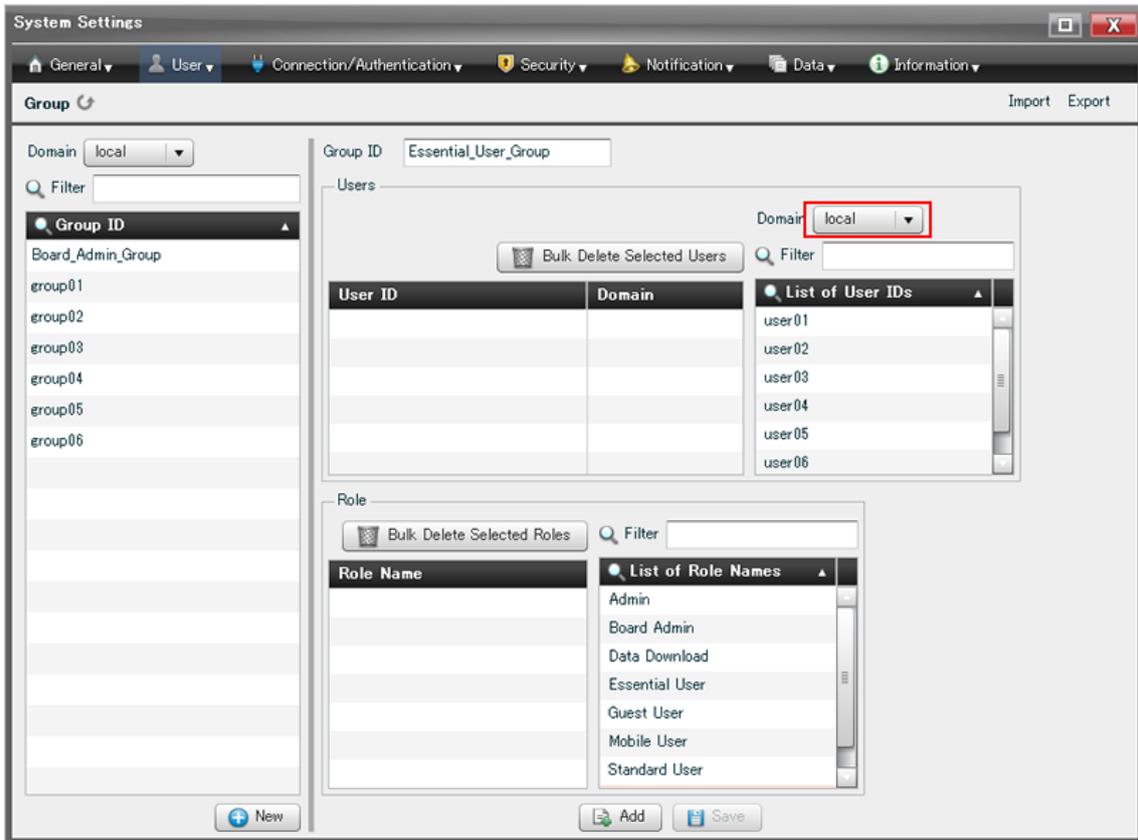
Creating Essential User Group

- Type the group name for the essential user group in the **Group ID** at the top of the screen.

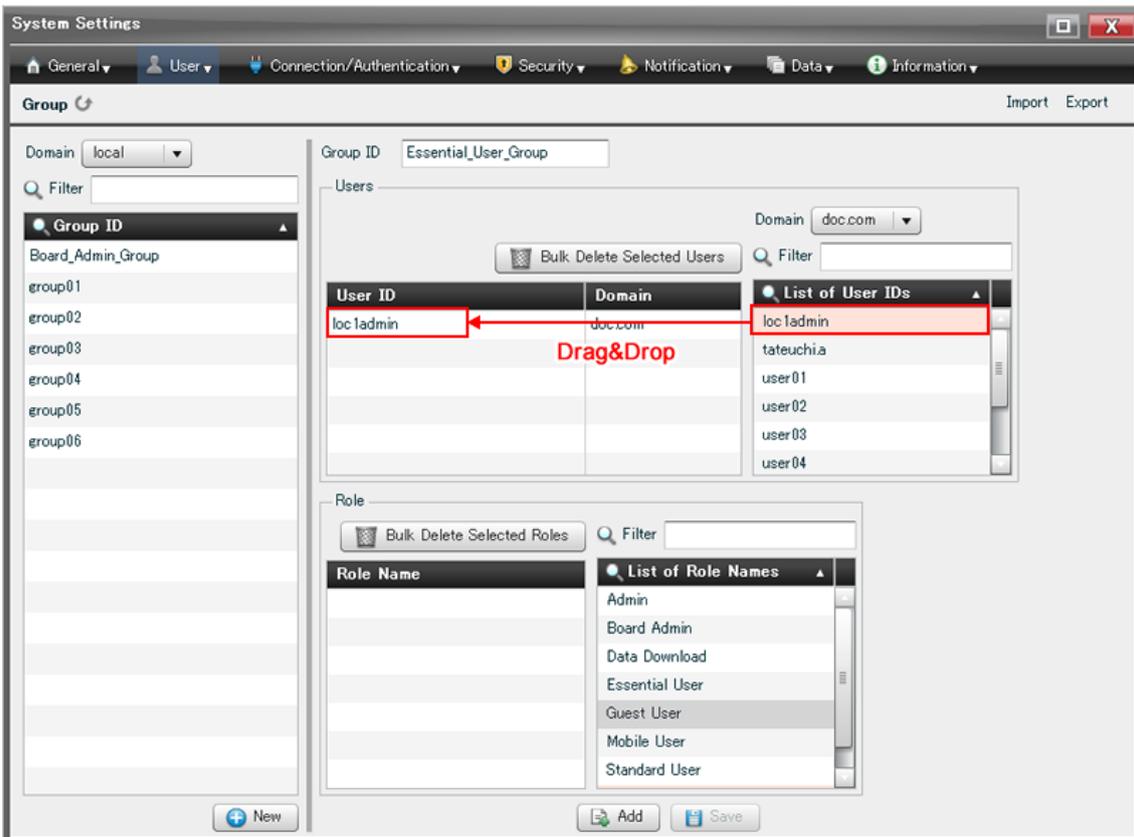


- From the **Domain** combo box for the user who belongs to the group, select the domain that you are using in Salesforce.

*** If you do not see the domain of your user account in Salesforce, see the "How to Add MotionBoard Cloud for Salesforce Domain" section on page 38.**



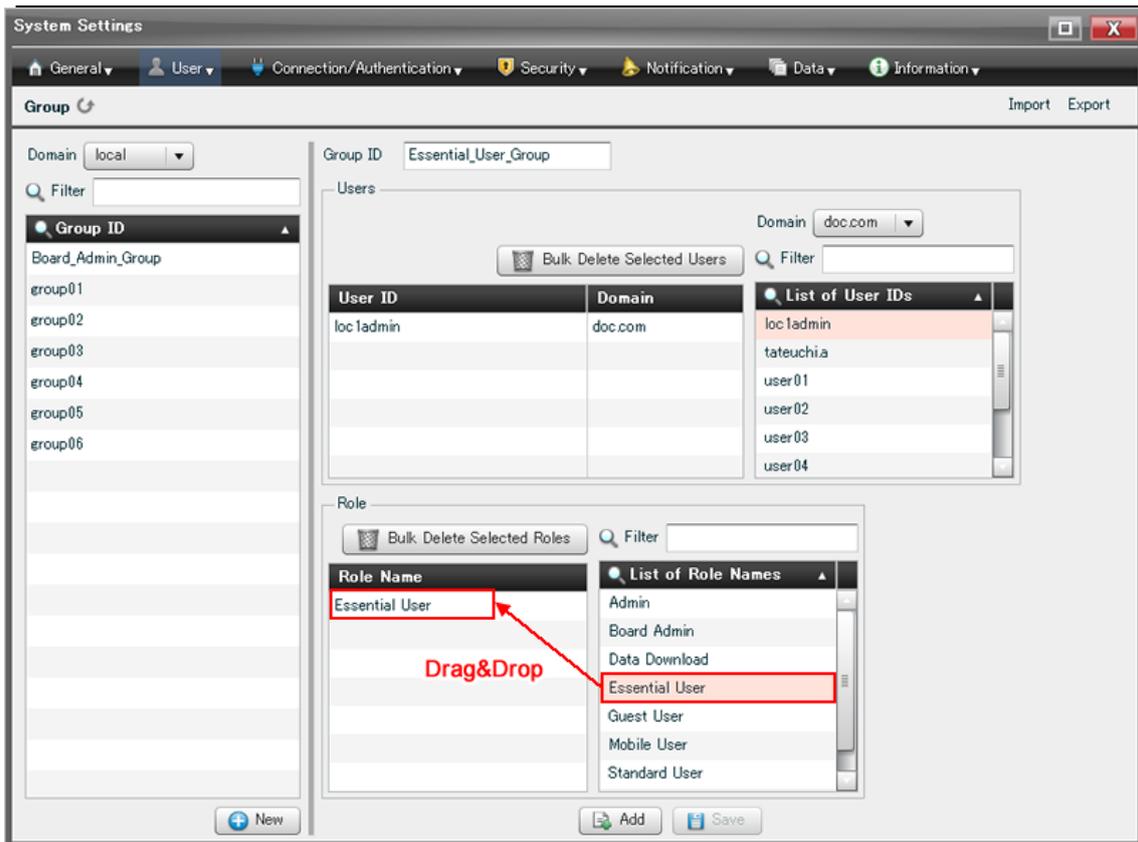
- From the **List of User IDs**, drag and drop the user you want to set for the group.



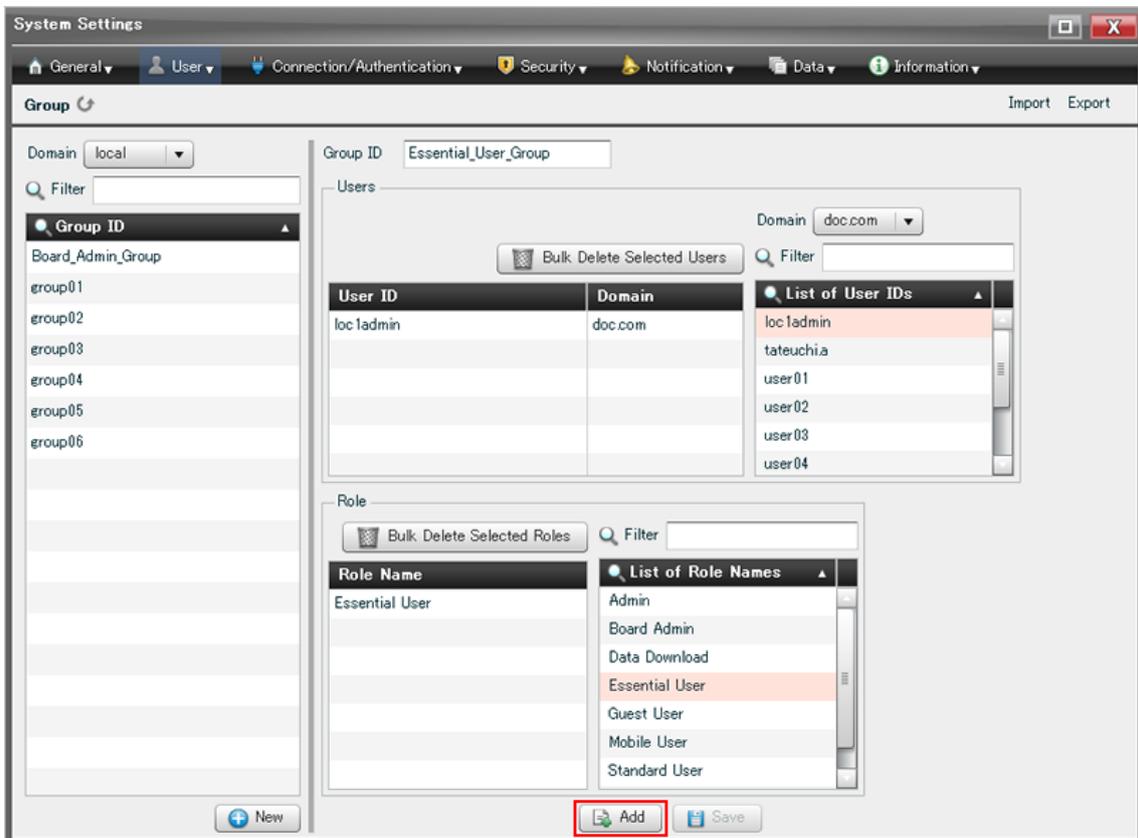
- Drag and drop **Essential User** from the Role Name list in the role settings item at the bottom of the screen.

For information about role types and permissions, see the online manual "Administrator's Guide (MotionBoard Cloud) - MBC-Chapter 1. Setting Before Use - MBC-1-6 Granting Roles (Permissions) to Groups".

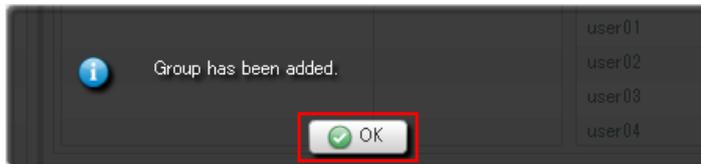
* The online manual can be viewed from [Help - Online Manual](#) at the top right of the [MotionBoard screen](#).



5. When you are finished setting up the role, click the **Add** button.



- Click the **OK** button in the dialog box.

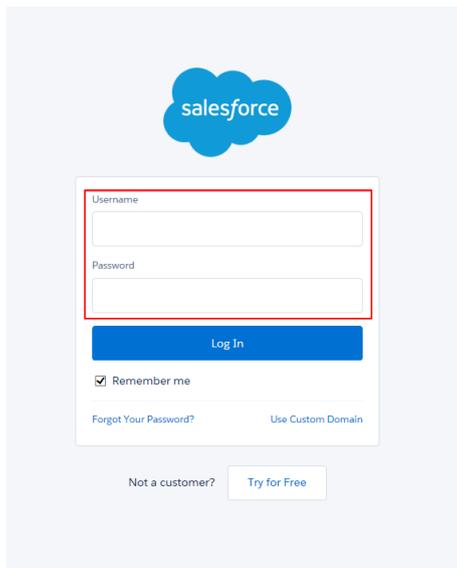


3. Login Confirmation to MotionBoard Cloud for Salesforce

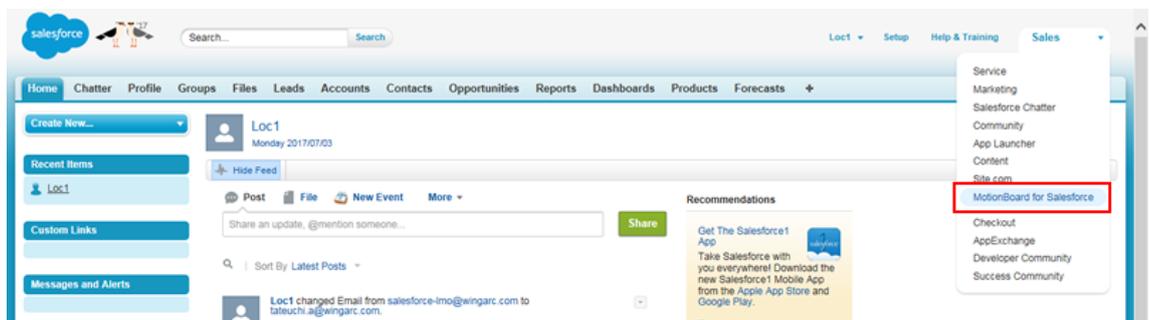
Make sure that the user registered as a designated user can log in to MotionBoard Cloud for Salesforce.

*** If you set the "Login IP Ranges" in the profile of the user who registered the account, after referring to "2. Salesforce Login IP Address Restriction Settings" in "Reference," set the profile to allow connections from MotionBoard Cloud for Salesforce.**

- Log in to Salesforce.



- From the Force.com application menu at the top right, select **MotionBoard for Salesforce**.



3. If the MotionBoard Cloud for Salesforce screen is displayed, permissions are successfully granted to the user.

Reference

1. Notes on Using MotionBoard Cloud for Salesforce

(1) Please log in and execute all the tasks described in this manual from the **Salesforce system account that you have registered at the time of application** unless specified otherwise.

(2) Browsers supported by MotionBoard Cloud for Salesforce
MotionBoard Cloud for Salesforce supports the following browser.

*** Supports browsers supported by Salesforce.**

Please use the following supported browsers.

[Supported browsers]

- Microsoft Edge *1
- Internet Explorer 7.0, 8.0, 9.0, 10.0 (32-bit)
- Mozilla Firefox 6 or later (32-bit)
- Google Chrome Ver20 or later *2

*1- If you are using WINDOWS10 build 1607 or later, it can be used in Ver. 5.6.00.001 or later.

*2- Two or more versions older than the current version are not supported because manufacturer support has been terminated.

(3) Install Adobe Flash Player

Adobe Flash Player 10.2 or later is required to use MotionBoard Cloud for Salesforce.

The Flash Player you need depends on the browser you use. Please check the following and install Flash Player in advance.

© Flash Player required to use the MotionBoard Cloud for Salesforce

- Internet Explorer: Adobe Flash Player ** ActiveX
 - Non-IE browser: Adobe Flash Player ** Plugin
- ** indicates Version number.

- Flash Player required to display moving PDF files (offline chart).

- Adobe Flash Player ** Plugin
- ** indicates Version number.

* Please install Flash Player software from the URL below.

http://get.adobe.com/jp/flashplayer/?no_redirect

(4) Cookie settings

MotionBoard Cloud for Salesforce uses cookies. Enable your Cookie settings in your browser.

◆ Microsoft Edge

1. Click on the toolbar  to display the window and click "Settings" at the bottom of the window.

2. Click "Show advanced Settings" in "Settings".

3. Select "Do not block cookies" from the pull-down of the "cookie" item in the "Advanced" setting.

4. Click the  on the toolbar to close the window.

◆ Internet Explorer

-
1. From the Tools menu, select Internet Options.
 2. Click the "Privacy" tab.
 3. Press the "Sites" button.
 4. Enter "*.variocloud.jp" in the address of the Web site and click the "Allow" button.
 5. Press "OK" to close the Internet Options screen and restart IE.

◆ Firefox

1. From the "Tools" menu, select "Options".
2. Select the Privacy panel.
3. If you want to enable "Remember history" in Firefox, click the "Cancel" to close the options screen.
(When "Remember history" is not set.
4. Set "Custom settings for history" in Firefox.
5. Check "Cookies from the site to store."
6. Click the "OK" button and close the Options window.

◆ Google Chrome

1. Click the "Google Chrome settings" icon  on the toolbar.
2. Select "settings".
3. Click "Show advanced Settings" at the bottom of the page.
4. Select the "Content settings" in the "Privacy" section.
5. Turn on "Allow data setting to local."

(5) Pop-up Blocker settings

To connect with the MotionBoard Cloud for Salesforce, remove the pop-up blocker in your browser.

◆ Microsoft Edge

* Microsoft Edge does not have settings to cancel pop-up Blocker settings individually. When pop-up is actually blocked, you will be prompted whether or not to allow pop-up from this particular site, select allow.

◆ Internet Explorer

1. Select the "Internet Options" from the "Tools" menu.
2. Click the "Privacy" tab.
3. Make sure that "enable pop-up Blocker" is not checked.
4. If there is no check, click Cancel to close the Internet Options screen.
(If checked)
5. If there is a check, click the "Settings" button on the right.
6. Enter *.variocloud.jp in the address of Web site to allow, click the 'Add' button.
7. Check "show notification bar when pop-up is blocked," if there is no check.
8. Press "Close", or "OK" to close the Internet Options screen and restart IE.

◆ Firefox

1. Select "Options" from the "Tools" menu.
2. Select the "Contents" panel.
3. If "Block Pop-Up "Windows" is not checked, click "Cancel" to close the options screen.

(If there is a check in the above 3)

4. Check "Block Pop-Up "Windows".

-
5. Enter *.variocloud.jp in the "Website Address " and click "Allow".
 6. Click "Close," or "OK" and close the Options window.

◆ Google Chrome

1. Click the "Google Chrome Settings" icon  on the toolbar.
2. Click "Settings".
3. Click "Show Advanced Settings."
4. In the "Privacy" section, click the "Content Settings".
5. In "Pop-Up" section, click "Manage Exceptions".
6. Type variocloud.jp in the "Host Name Pattern." Make sure that "Action" is set to allow, then click "Finish".

(6) Register as a trusted site

To connect to MotionBoard Cloud for Salesforce, you must register it as a trusted site in your browser.

◆ Microsoft Edge

- * Microsoft Edge does not have a trusted site registration feature.
- Please respond to the pop-up each time.

◆ Internet Explorer

1. Select the "Internet Options" from the "Tools" menu.
2. Click the "Security" tab.
3. Click the "Trusted sites" and click the "Sites" button.
4. Type "https://*.variocloud.jp" in "Add this web site to the zone" and click the "Add" button.
5. Make sure that your input is registered in the Web site.
6. Click "Close" and "OK" to close the Internet Options screen and restart IE.

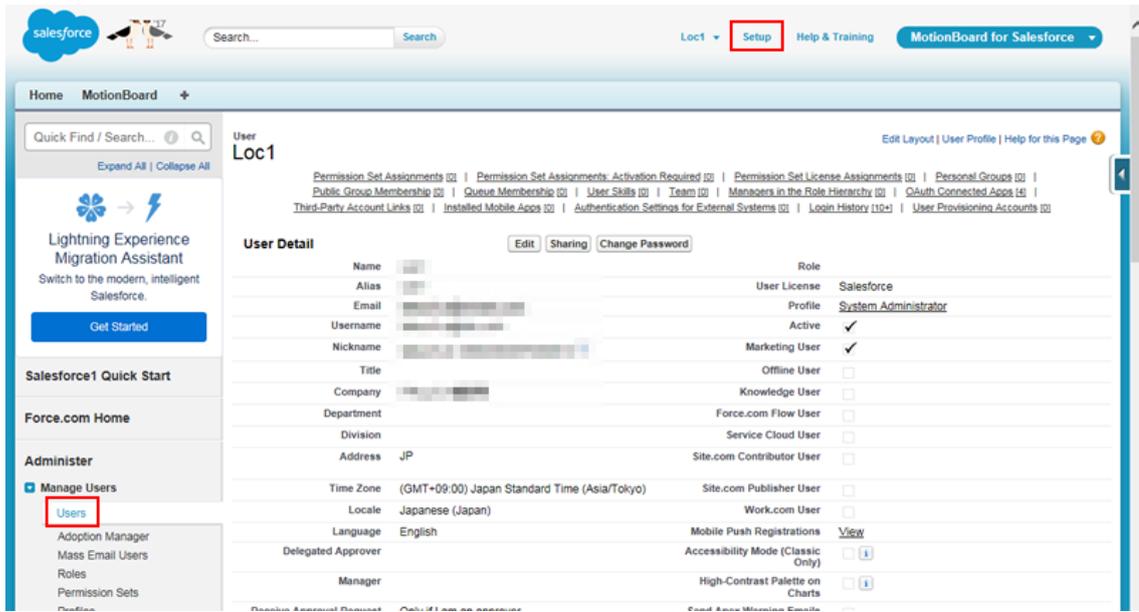
◆ Firefox

1. Select "Options" from the "Tools" menu.
2. Select the "Security" pane.
3. Click the "Allowed sites" button.
4. Enter *.variocloud.jp in the "Website Address " and click "Allow".
5. Click "Close" and "OK" and close the Options window.

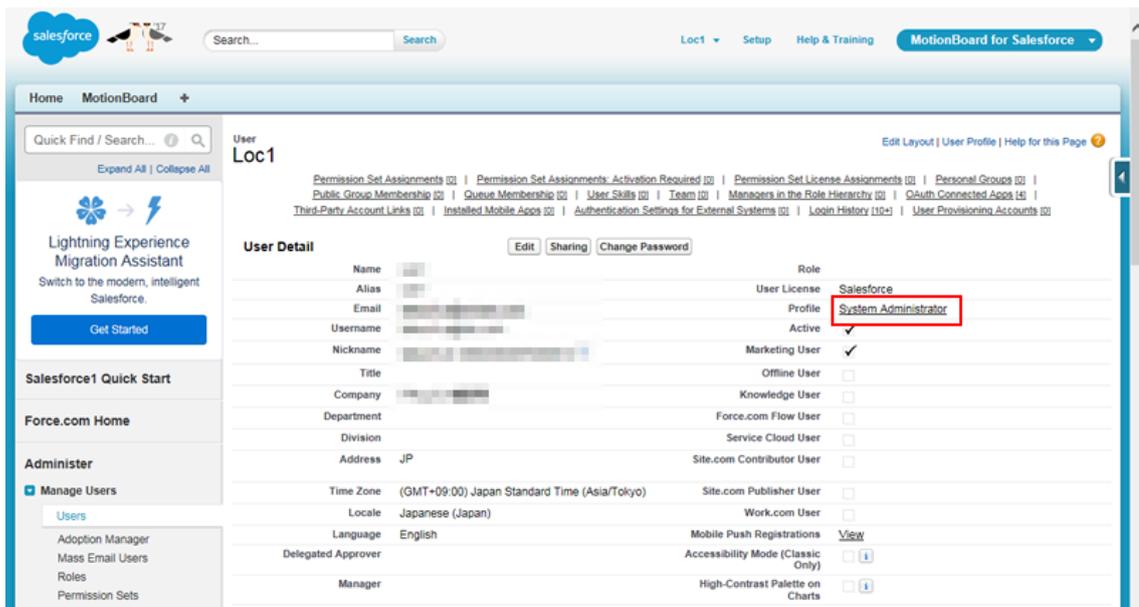
2. Salesforce Login IP Address Restriction Settings

Set the following to the Salesforce profile in which all users using MotionBoard Cloud for Salesforce are registered:

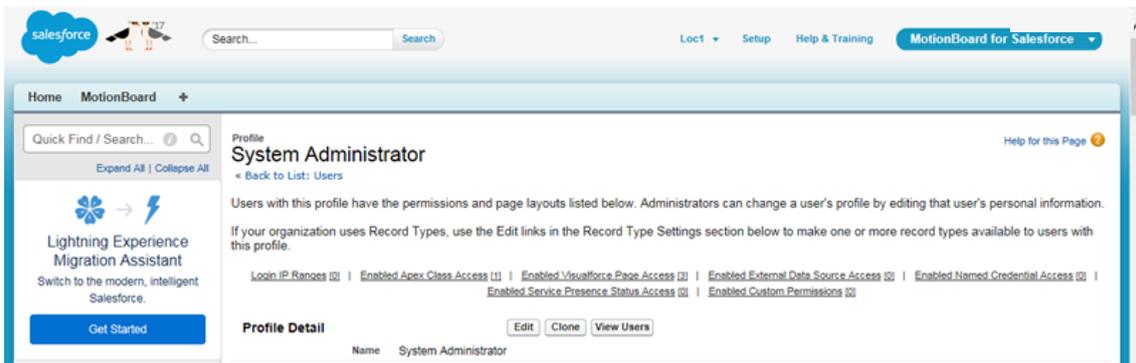
1. Log in to Salesforce as a system administrator, and then click **Setup** in the upper right of the initial Salesforce screen to display the following information:
Manage Users – Users - <user_name>



2. Click the **System Administrator** profile.
This section describes how to set the profile name "System Administrator" as an example. The steps 2 to 4 are required for all Salesforce profiles that use MotionBoard Cloud for Salesforce.



3. Check the **Login IP Ranges** at the bottom of the System Administrator field screen.



}

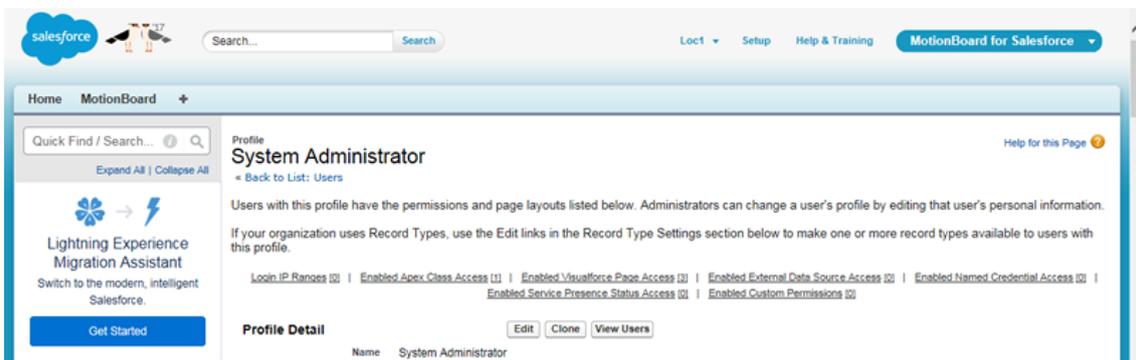


4. Check the **Login IP Ranges**.

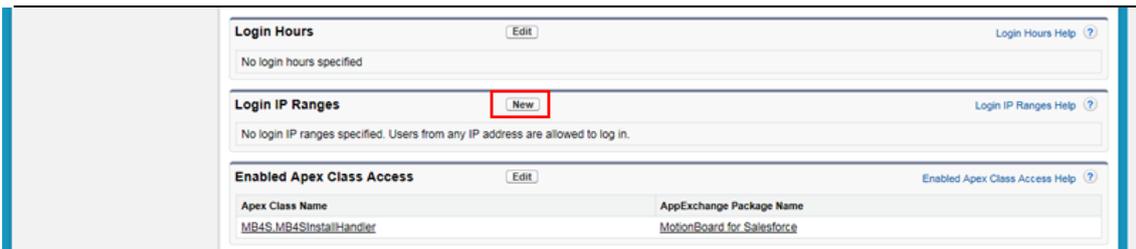
- ① If **nothing is set** to **Login IP Ranges**, perform the set up explained in step 4-1.
- ② If **"IP address you are using"** is set to **Login IP Ranges**, perform the set up explained in step 4-2.

4-1. If nothing is set to **Login IP Ranges**

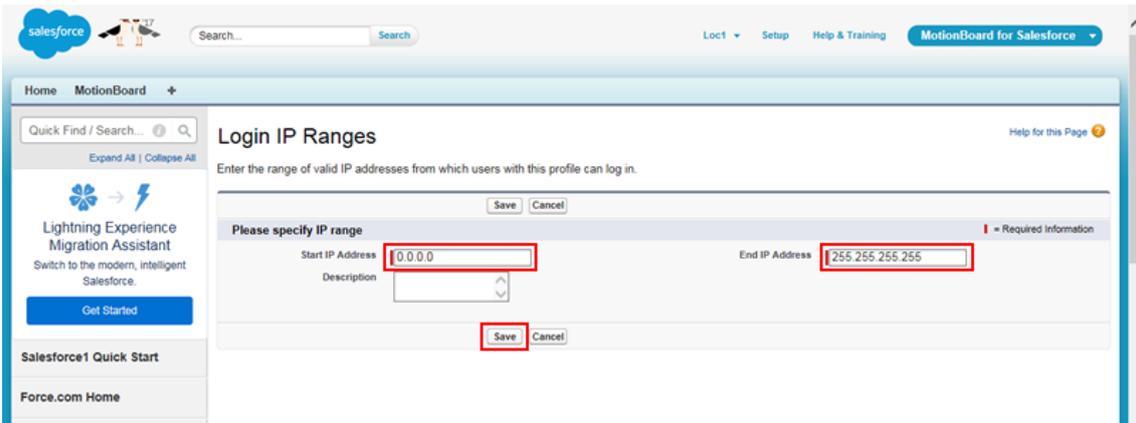
1. Click the **New** button in the **Login IP Ranges** at the bottom of the System Administrator field screen.



}

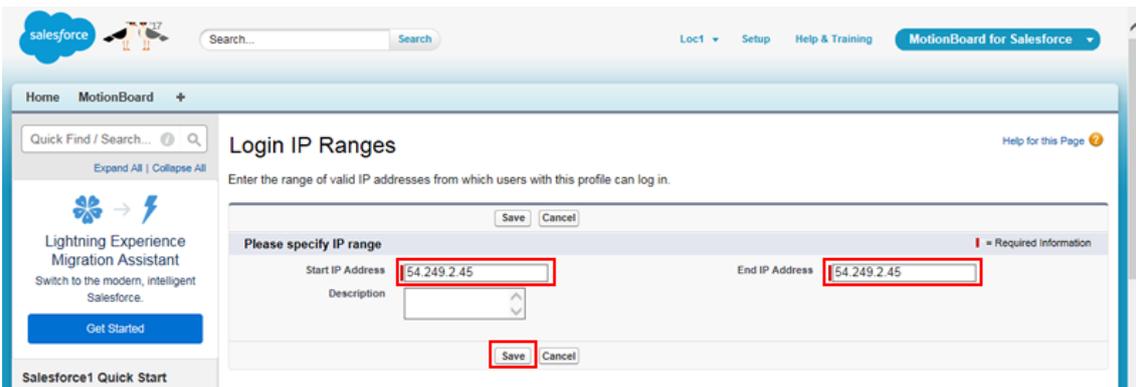


2. In the IP address range setting, enter '0.0.0.0' to the start IP address, and '255.255.255.255' to the end IP address, and then click the **Save** button.

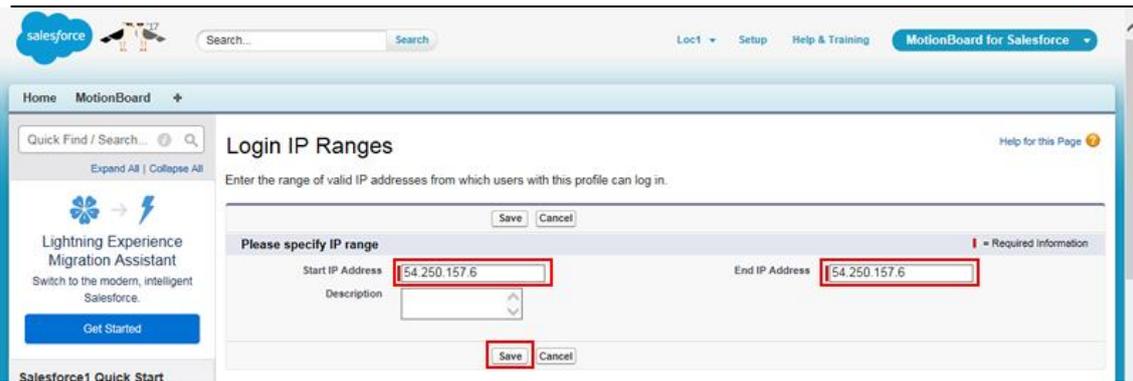


4-2. If the **Login IP Ranges** is set to the IP address you are using.

1. In the IP address range, type '54.249.2.45' for both the start IP address and the end IP address, and then click the **Save** button.



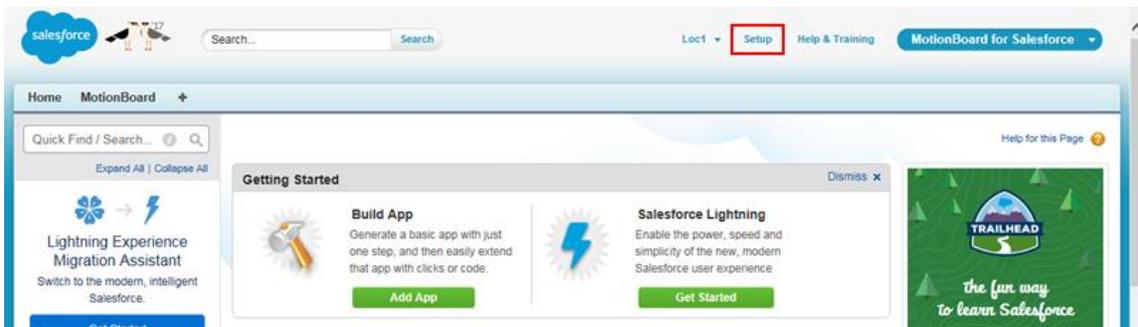
2. Open the Settings screen again, type '54.250.157.6' for both the start IP address and the end IP address in the IP address range, and then click the **Save** button.



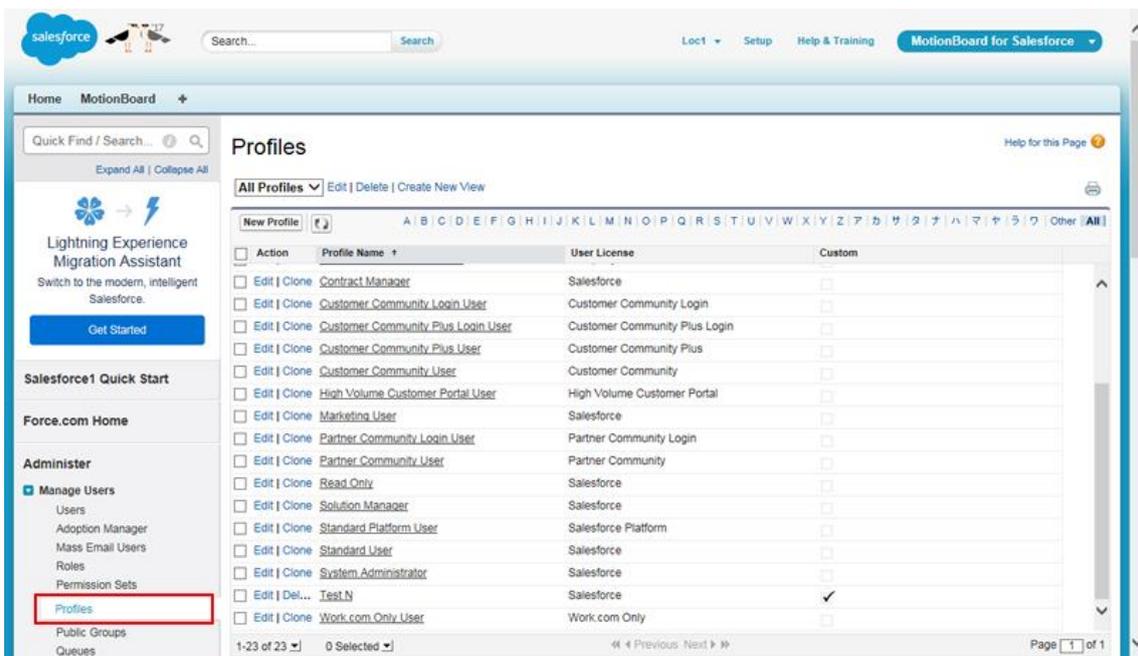
3. See Salesforce Settings and Definitions.

If you are registering a user with a profile other than the standard profile provided by Salesforce (custom profile), you must enable the "Reference settings and Definitions" setting in your profile settings.

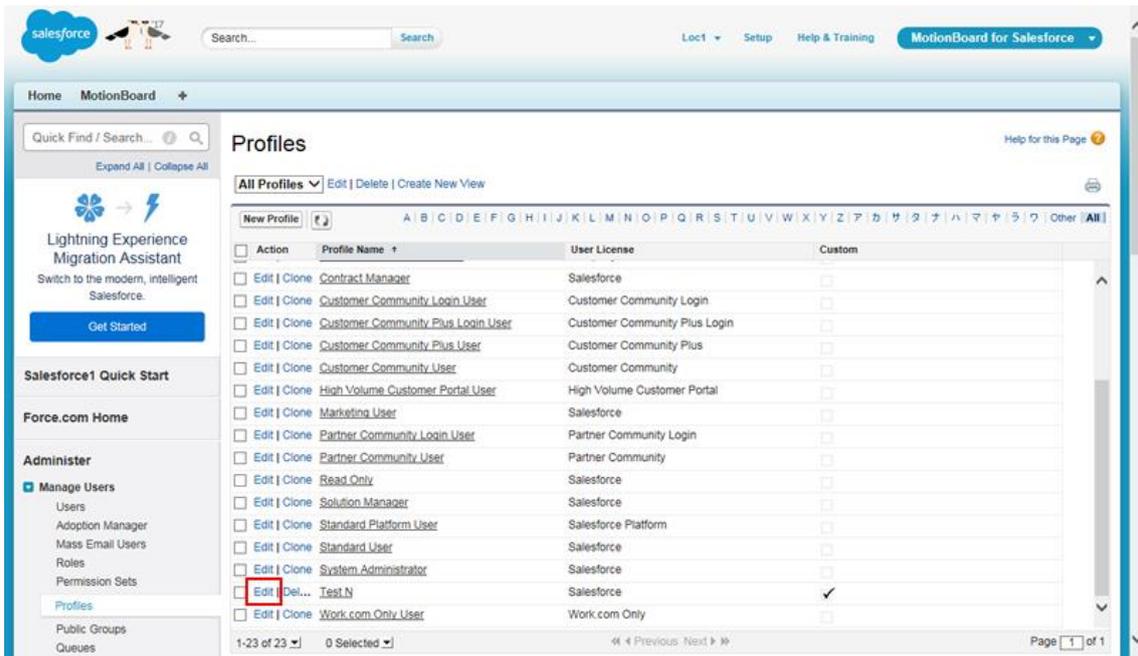
1. Click **Setup**.



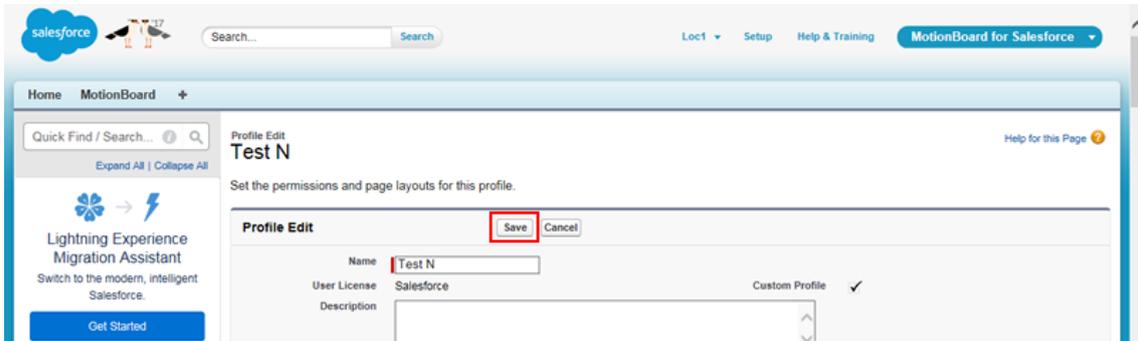
2. Click **Profiles** under **Manage Users**.



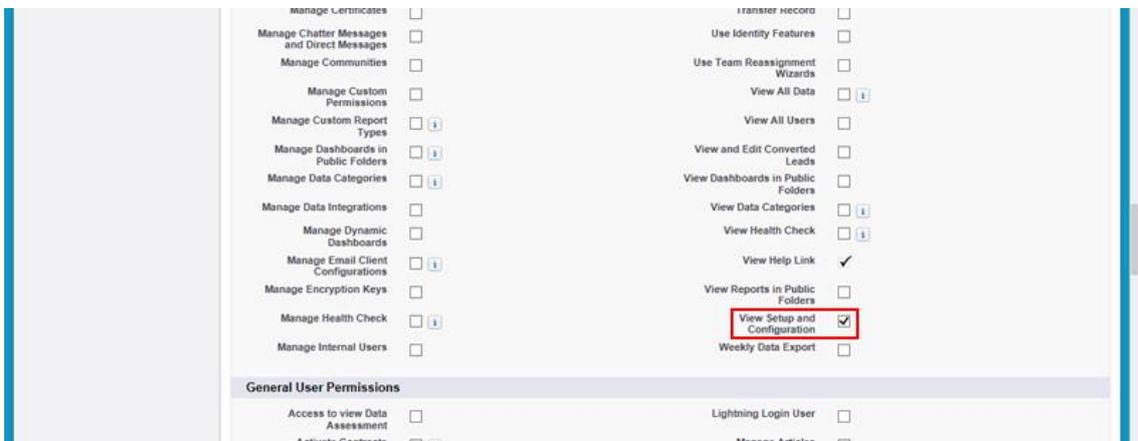
3. Click **Edit** for the target profile. (Modifies the profile of "Test N" in this case.)



4. In the **Administrative Permissions** section, select **View Setup and Configuration** checkbox and click the **Save** button.



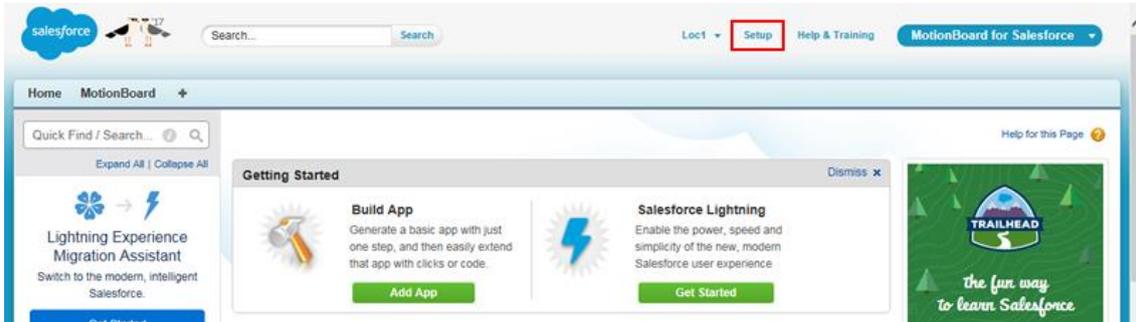
}



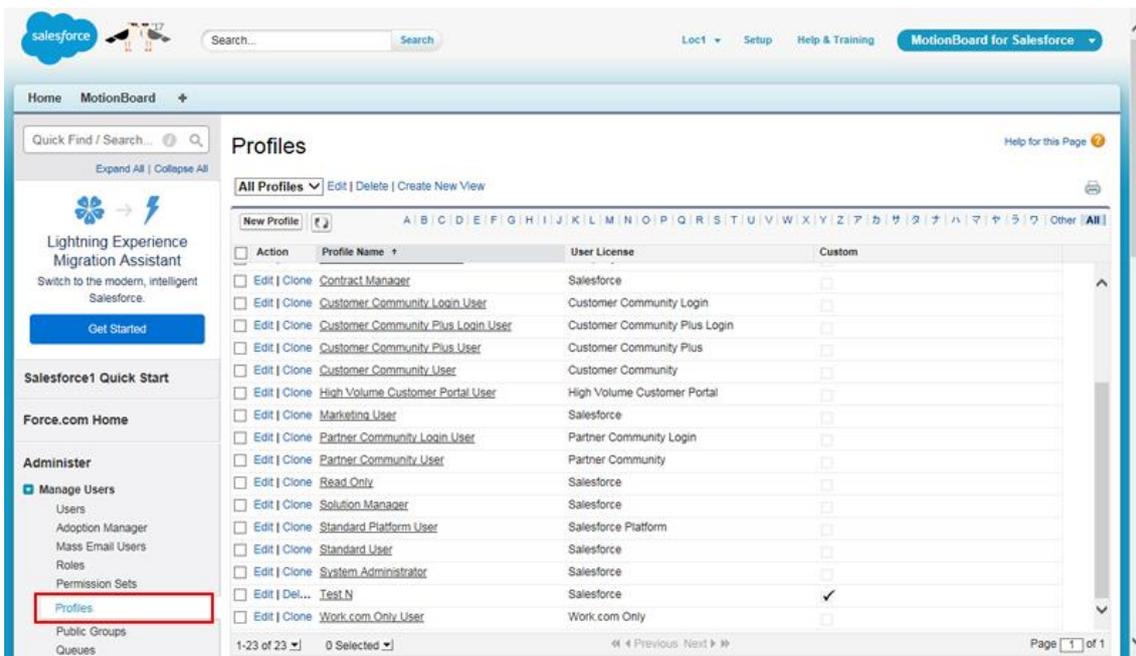
4. Enabling Salesforce Visualforce

If you want to register a user who has a profile other than the standard profile provided by Salesforce (a custom profile), you must set the MotionBoard Cloud for Salesforce page name in the profile settings "Valid Visualforce page".

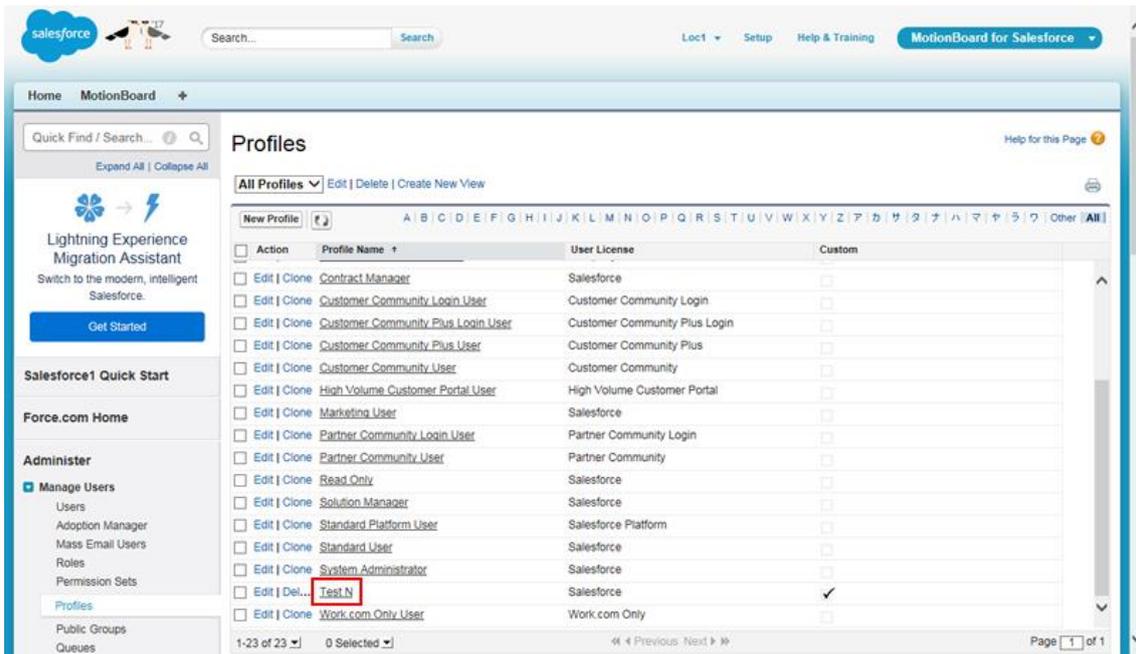
1. Click **Setup**.



2. Click **Profiles** under **Manage Users**.

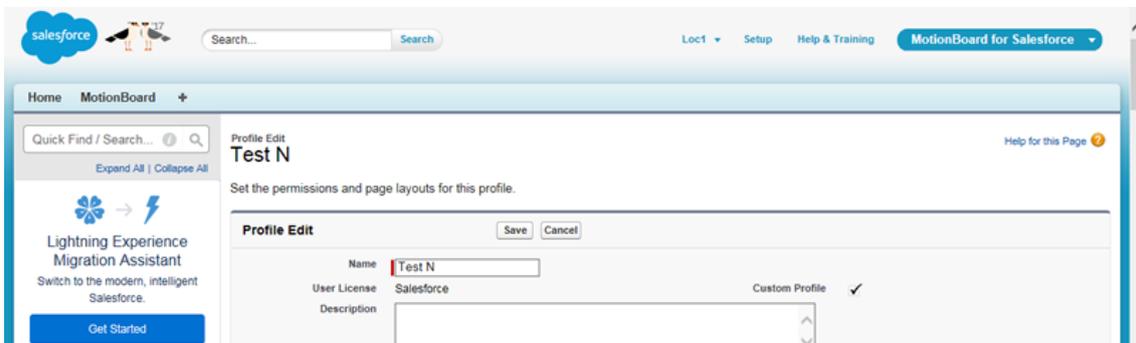


3. Click the target profile. (Modifies the profile of "Test N" in this case.)



4. If the following three page names are not set in the **Enabled Visualforce Page Access** section, click the **Edit** button to set them.

- MB4S.MotionBoardSettingStartView
- MB4S.MotionBoardSettingView
- MB4S.MotionBoardView



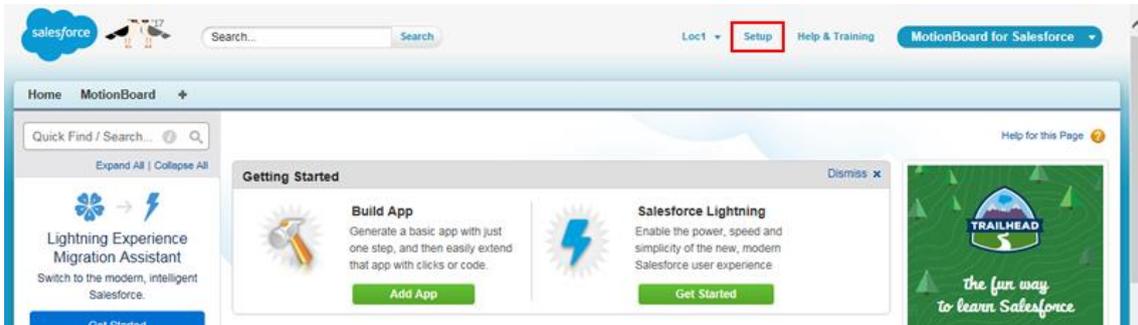
5



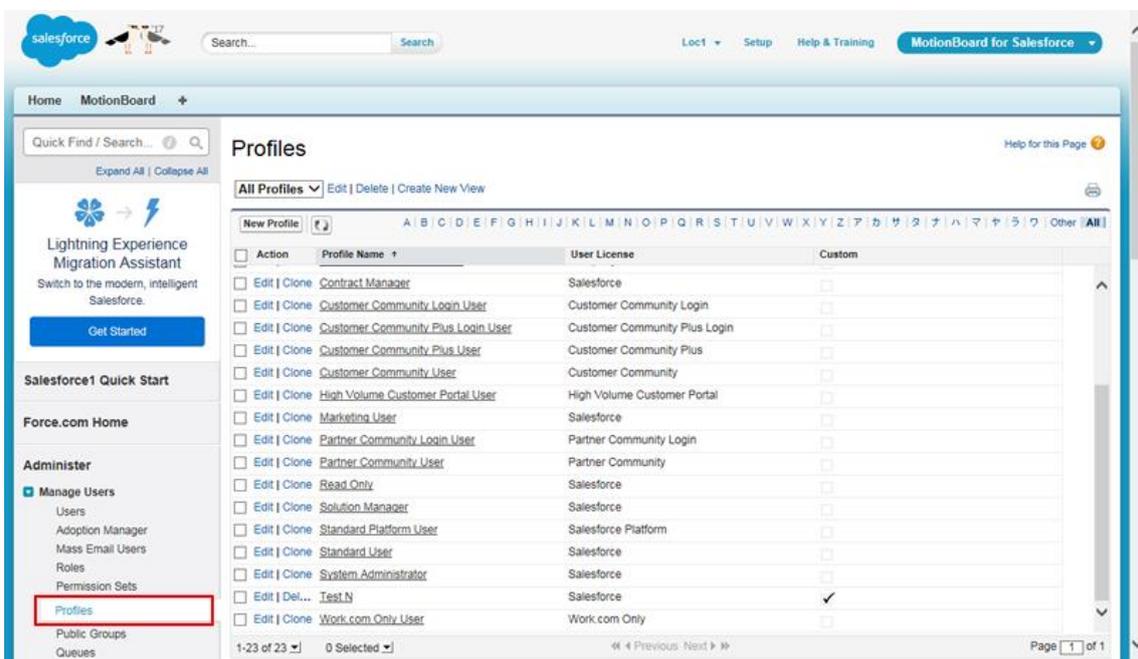
5. Enabling the Salesforce API

If you want to register a user who has a profile other than the standard profile that Salesforce provides (a custom profile), the **API Enabled** setting in the profile settings must be enabled.

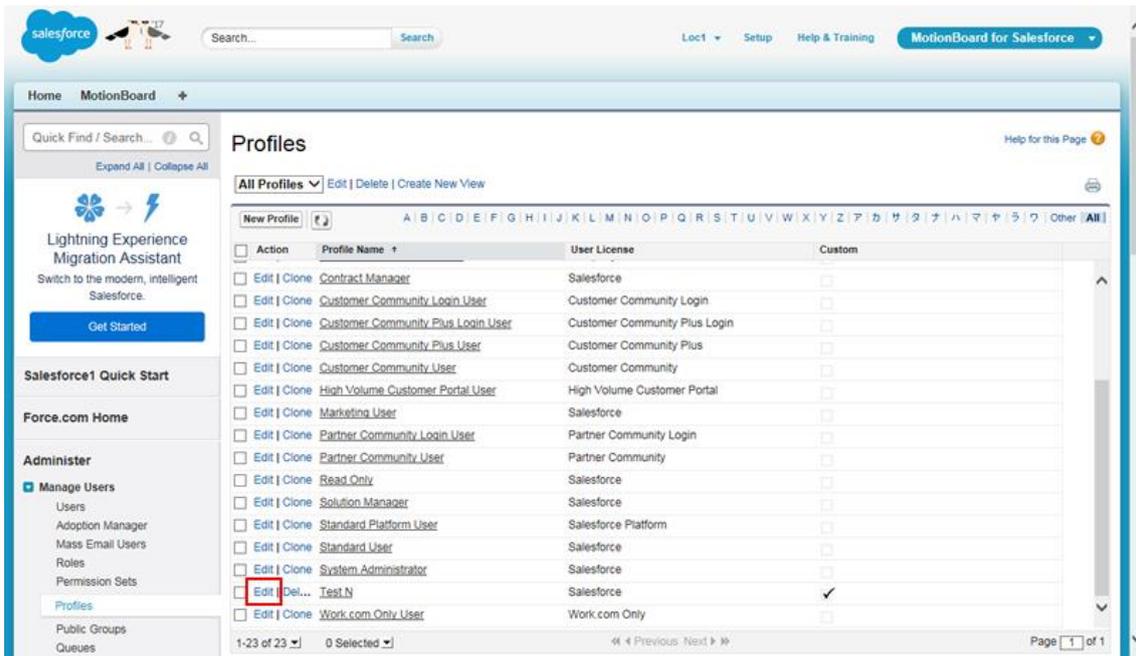
1. Click **Setup**.



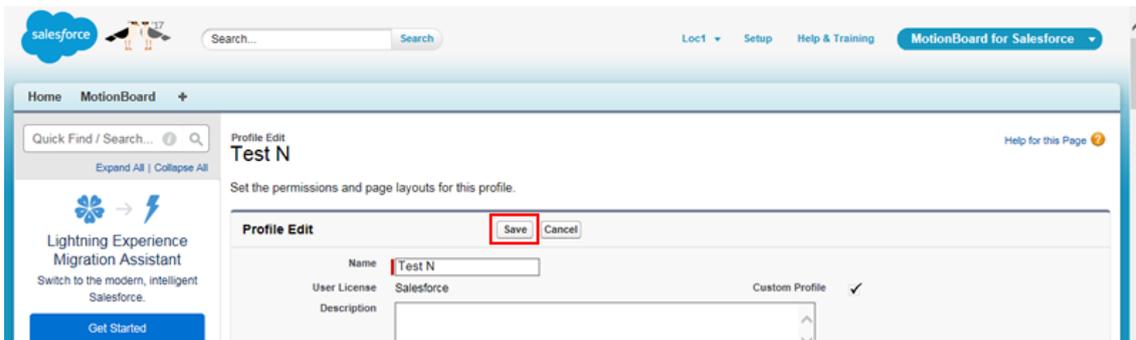
2. Click **Profiles** under **Manage Users**.



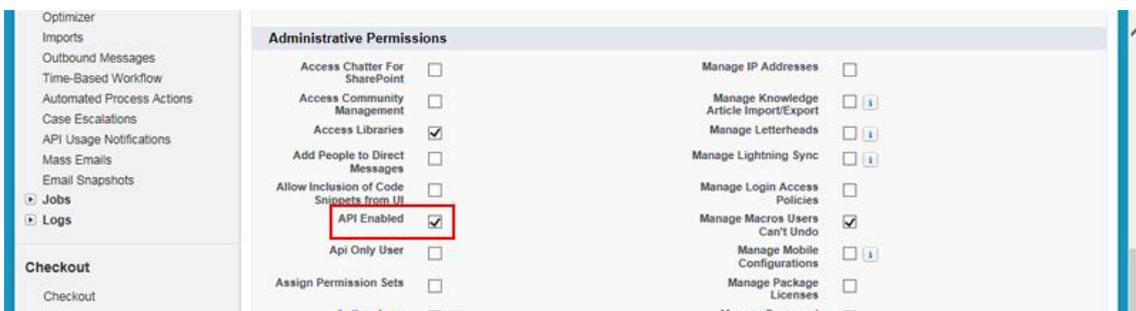
3. Click **Edit** for the target profile. (Modifies the profile of "Test N" in this case.)



4. Select **API Enabled** checkbox in the **Administrative Permissions** section and click the **Save** button.



5



6. Change Salesforce Password Policy

The next step is to change the password policy.

*** Note**

If you are doing a task setting, such as delivering mail or putting data into data storage, you

will not be able to run those tasks when the Salesforce password for the user who runs the task expires.

If you cannot change your password policy due to your internal rules, please change your password before the expiration date.

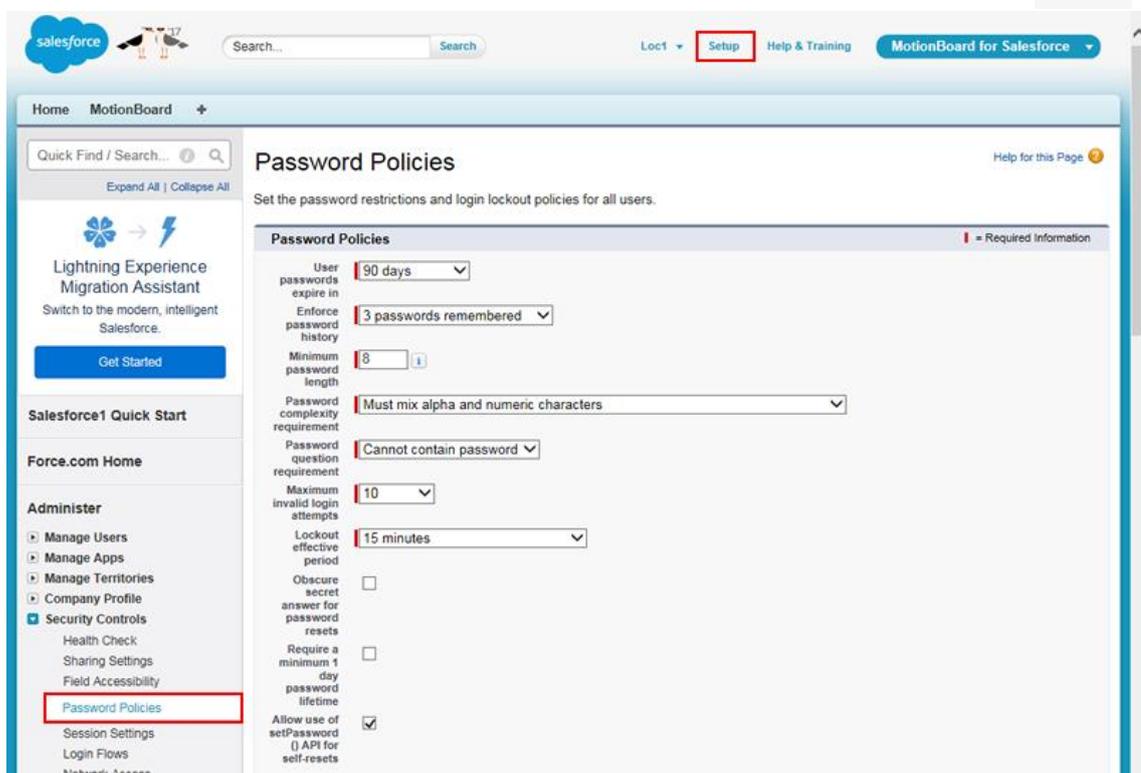
If you want to change the password for the user who is running the task, select **Management -System Settings - Connection/Authentication -External Connection**, from the top right of the board screen, select **salesforce** and change the password of the right screen **Delegated User**.

<Reference>

◆ Administrator's Guide (MotionBoard Cloud)

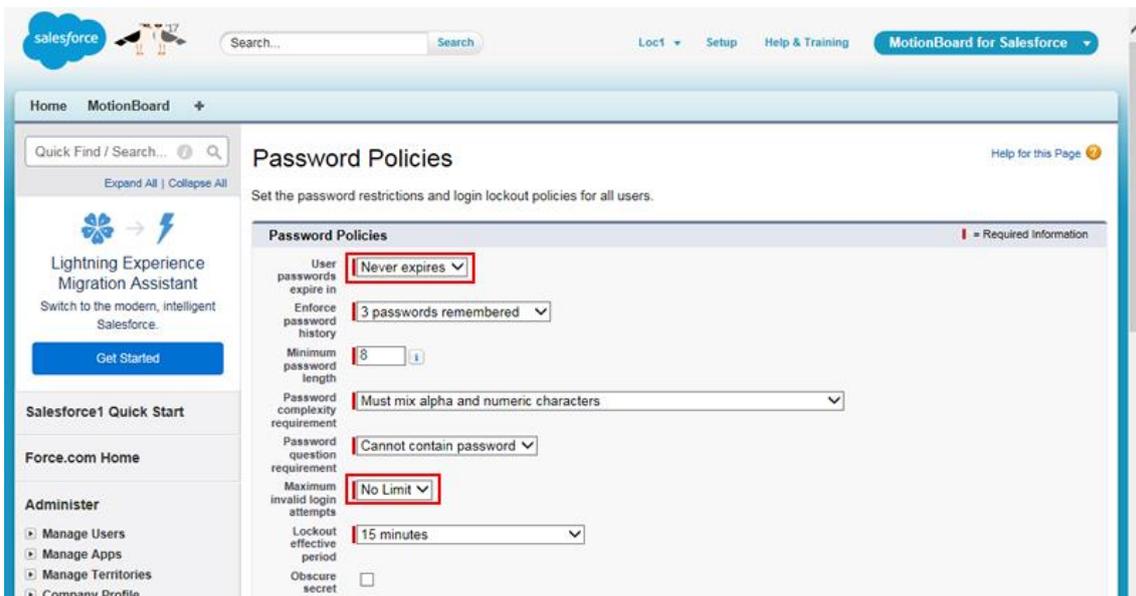
"MBC-Chapter 2. Reference - MBC-2-2 Setting Delegated User"

1. Log in as the system administrator to Salesforce.
2. Click **Setup** and select **Administer - Security Controls - Password Policies** from the toolbar on the left side of the screen.



The screenshot displays the Salesforce 'Password Policies' configuration page. At the top, the 'Setup' button in the navigation bar is highlighted with a red box. The left sidebar shows the 'Administer' menu with 'Security Controls' expanded, and 'Password Policies' highlighted with a red box. The main content area is titled 'Password Policies' and includes a sub-header 'Set the password restrictions and login lockout policies for all users.' Below this, there are several configuration options: 'User passwords expire in' (90 days), 'Enforce password history' (3 passwords remembered), 'Minimum password length' (8), 'Password complexity requirement' (Must mix alpha and numeric characters), 'Password question requirement' (Cannot contain password), 'Maximum invalid login attempts' (10), and 'Lockout effective period' (15 minutes). There are also checkboxes for 'Obscure secret answer for password resets', 'Require a minimum 1 day password lifetime', and 'Allow use of setPassword() API for self-resets'.

3. Change the **User passwords expire in** to **Never expires**.
Change the **Maximum invalid login attempts** to **No Limit**.



4. Click the **Save** button.



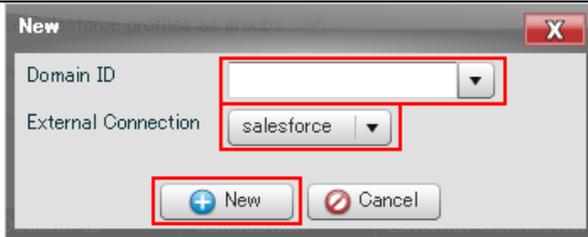
7. How to Add MotionBoard Cloud for Salesforce Domain

If the domain of the user account used in Salesforce is different from the domain of the Administrator user account, set the following:

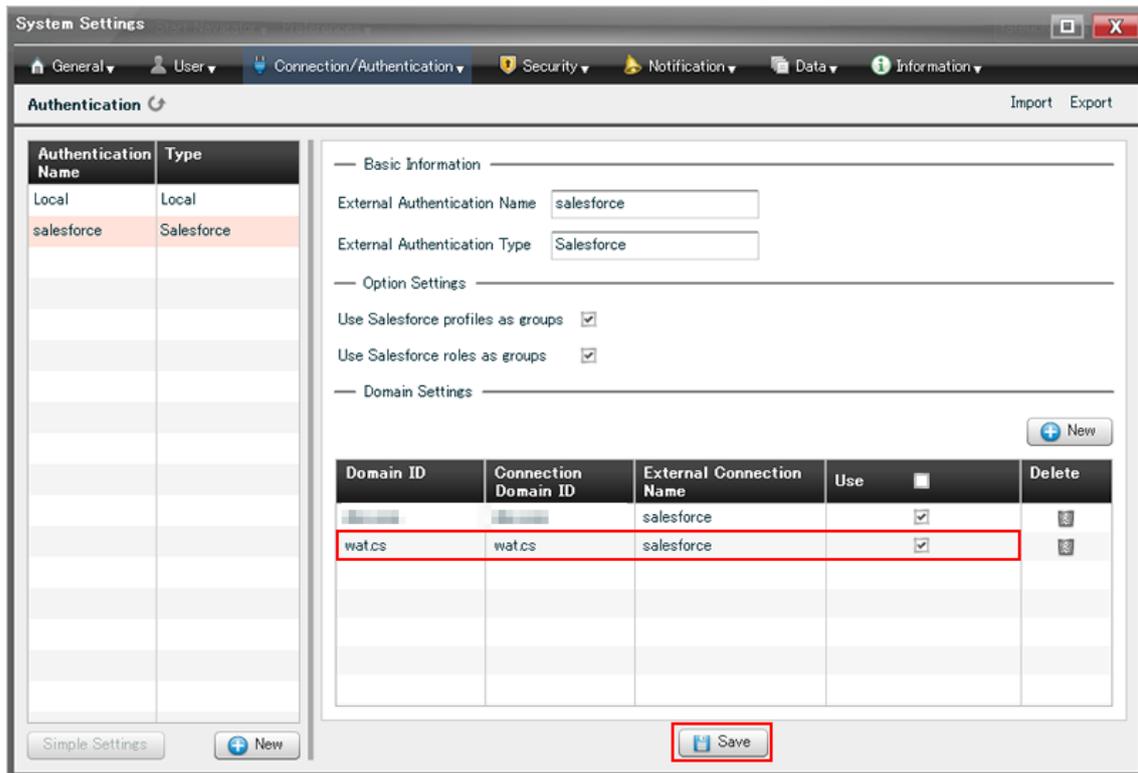
For information about how to add a MotionBoard Cloud for Salesforce Domain, see "Administrator's Guide (MotionBoard Cloud) - MBC-Chapter 1. Setting Before Use - MBC-1-2 Setting Domain for SFDC Authentication."

* [The online manual can be viewed from **Help - Online Manual** at the top right of the MotionBoard screen.](#)

4. Enter the domain you want to add to the **Domain ID**, and select **salesforce** as the **External Connection**, and then click **New** button.
* The domain is the second part (after @) of the Salesforce login ID.
Example) login ID: variocloud@wat.cs



5. Click the **Save** button, and then verify that the domain registered in the domain settings screen is displayed.



8. Set IP Address Restrictions

You can restrict the login IP address in the MotionBoard Cloud for Salesforce. The settings are as follows:

For information about setting IP address restrictions, see the online documentation "MotionBoard Cloud for Salesforce"- "MotionBoard Management"- "Chapter 2 MotionBoard System Settings"- "2-4-2" IP address restriction" screen."

* The online manual can be viewed from [Help - Online Manual](#) at the top right of the [MotionBoard](#) screen.

9. Confirmation Method When You Cannot Connect to the MotionBoard Cloud for Salesforce

If you are unable to connect to MotionBoard Cloud for Salesforce, please check the following items:

-
- A) Are you logged in to Salesforce with the same account as the system administrator registered at the time of application?
 - Please log in as the SFDC system administrator registered at the time of application.
 - B) Did you set the login IP address restrictions?
 - Please check the "[2. Salesforce Login IP Address Restriction Settings](#)" in "Reference" of this manual.
 - C) Are you logged into the correct SFDC organization?
 - The SFDC organization ID in a Sandbox environment is different from the production environment. Please check your organization information.
 - D) Is the correct type of Flash Player installed?
 - Please check the "1. Notes on Using MotionBoard Cloud for Salesforce - (3)" in "Reference" of this manual.
 - E) Is the cookie setting enabled?
 - Please check the "1. Notes on Using MotionBoard Cloud for Salesforce - (4)" in "Reference" of this manual.
 - F) Are pop-up blockers allowed?
 - Please check the "1. Notes on Using MotionBoard Cloud for Salesforce - (5)" in "Reference" of this manual.
 - G) Have you registered to trusted sites?
 - Please check the "1. Notes on Using MotionBoard Cloud for Salesforce - (6)" in "Reference" of this manual.
 - H) Is the MotionBoard Cloud for Salesforce package configured correctly?
Please check the step 6 in "1. Install MotionBoard for Salesforce" in Chapter 1 of this manual.
If you are not using My Domain, please do not enter anything in the Company Domain field.
 - I) If your Salesforce profile is a custom profile, is **View Setup and Configuration** checkbox in your profile settings selected?
 - Please check "3. See Salesforce Settings and Definitions" is in this manual.
 - J) Is a valid Visualforce page configured to use MotionBoard?
 - Please check "4. Enabling Salesforce Visualforce" in this manual.

If you do not see the MotionBoard Cloud for Salesforce screen after checking all these items in this documentation, please contact us via the support site.

Chapter 3 How to Use Data Storage

This chapter describes the steps for creating data storage to take advantage of the data storage capabilities of the cloud BI dashboard "MotionBoard Cloud for Salesforce" based on CSV data.

This section describes "Delegated User Settings" and "How to Create Data Storage" to take advantage of the data storage capabilities.

1. Delegated User Settings

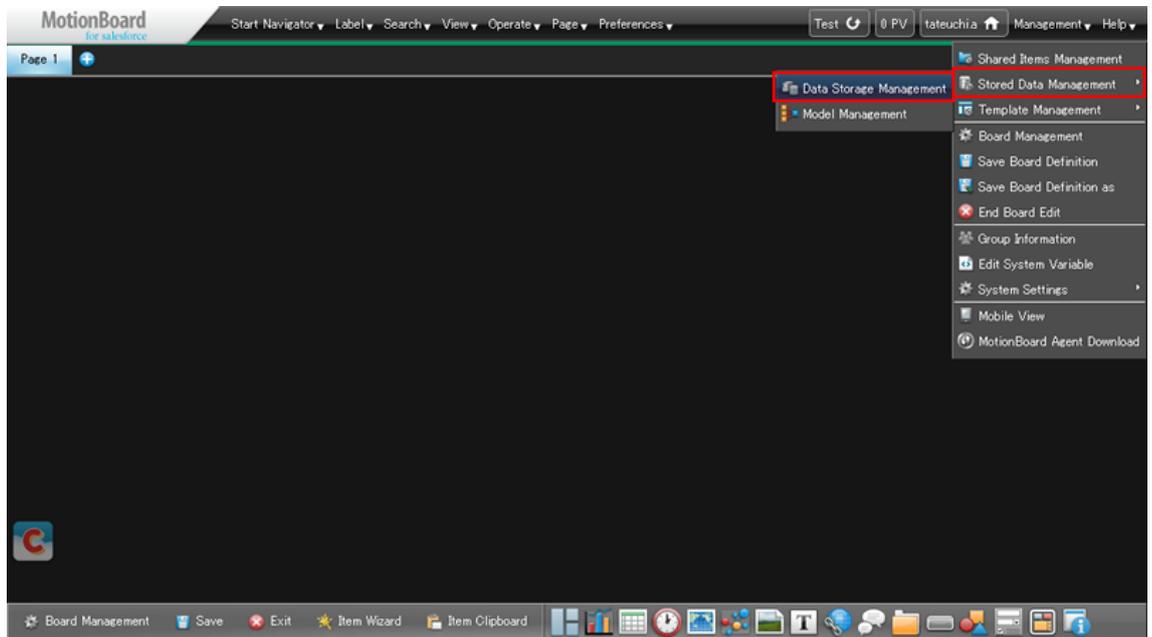
Register users who want to retrieve data from Salesforce as a delegated user, or to perform a snapshot of data storage.

For information about setting up delegated users, refer to the online manual "Administrator's Guide (MotionBoard Cloud) - MBC-Chapter 2. Reference - MBC-2-2 Setting Delegated User."

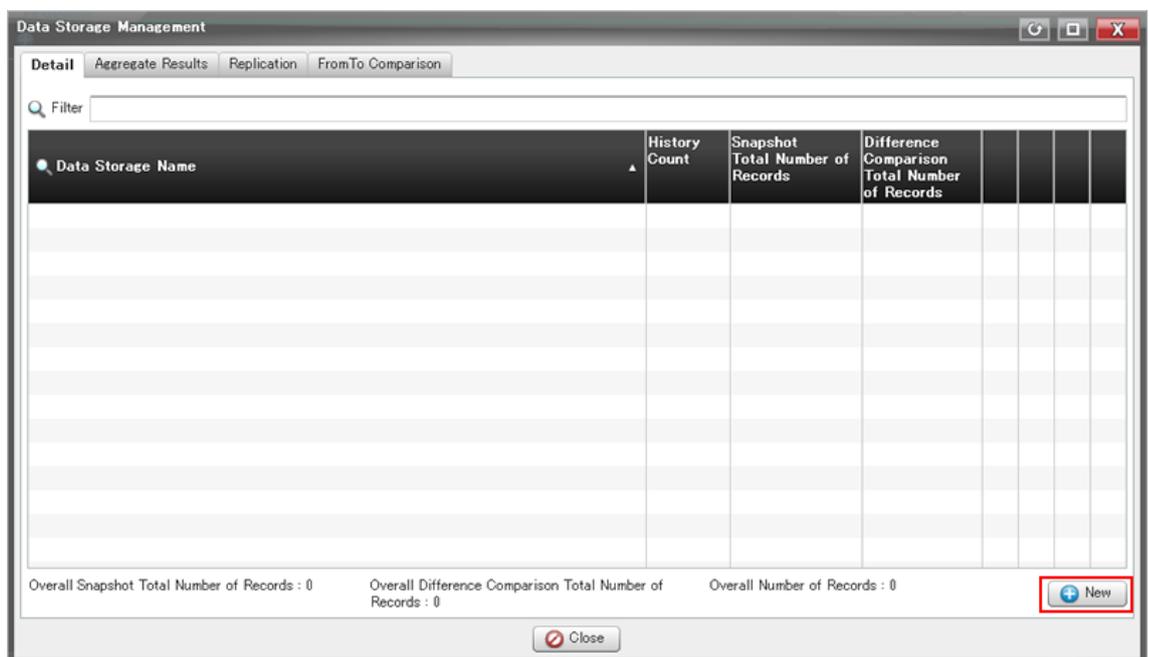
* [Online manuals can be viewed from Help - Online Manual at the top right of the MotionBoard screen.](#)

- **Delegated user who performs functions**
Set **Use delegated users for non-Salesforce user access** to ON, and then select the executing user in the **Delegated User**.
- **Delegated user who performs function to obtain Salesforce reports**
Set **Use delegated user to obtain reports when the user does not have "Modify All Data" permission.** to ON, and then select the executing user in the **Report Import User**.
- **Delegated user to delegate login**
Set **Use delegated user to log in when the user does not have "View Setup and Configuration" permission.** to ON and select executing user in the **Login User**.

3. Store the data that you uploaded to **Shared Items Management - CSV** in data storage in step 1 and 2. (Example: "Sample Monthly Sales Analysis.csv")
Click **Management** on the top right of the board screen and select **Stored Data Management - Data Storage Management**.



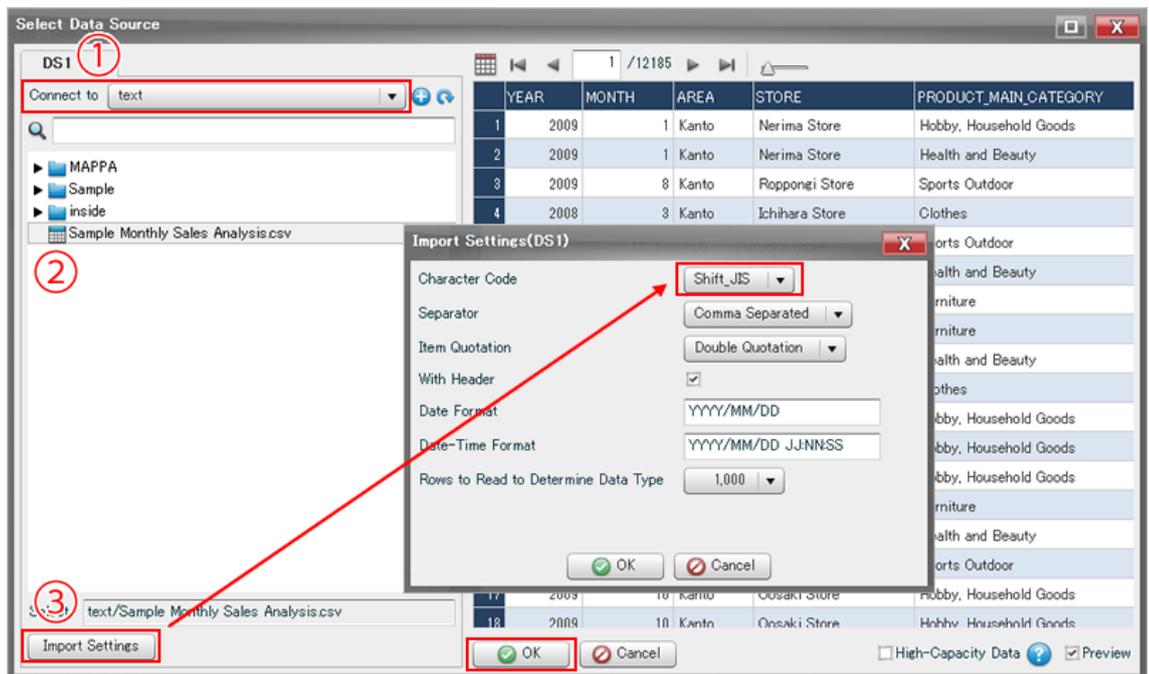
4. Click the **New** button on the **Detail** tab in the **Data Storage Management** screen.



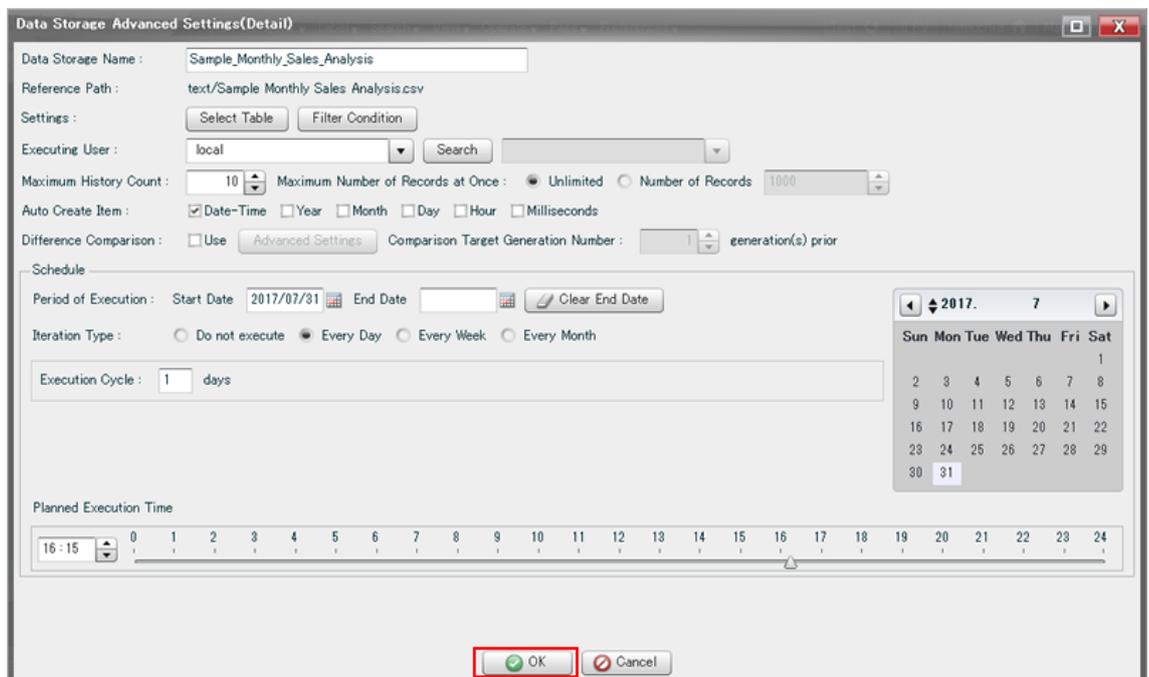
5. Set the table list screen as follows and click the **OK** button.
 - ① Select **text** as connection destination.
* Please select **salesforce** to use Salesforce data.
 - ② Select the corresponding CSV file.
(In this example, select the "Sample Monthly Sales Analysis.csv" that you just

uploaded in step 2.)

- ③ If characters are garbled or an error occurs, change the character code from the **Import Settings** button.



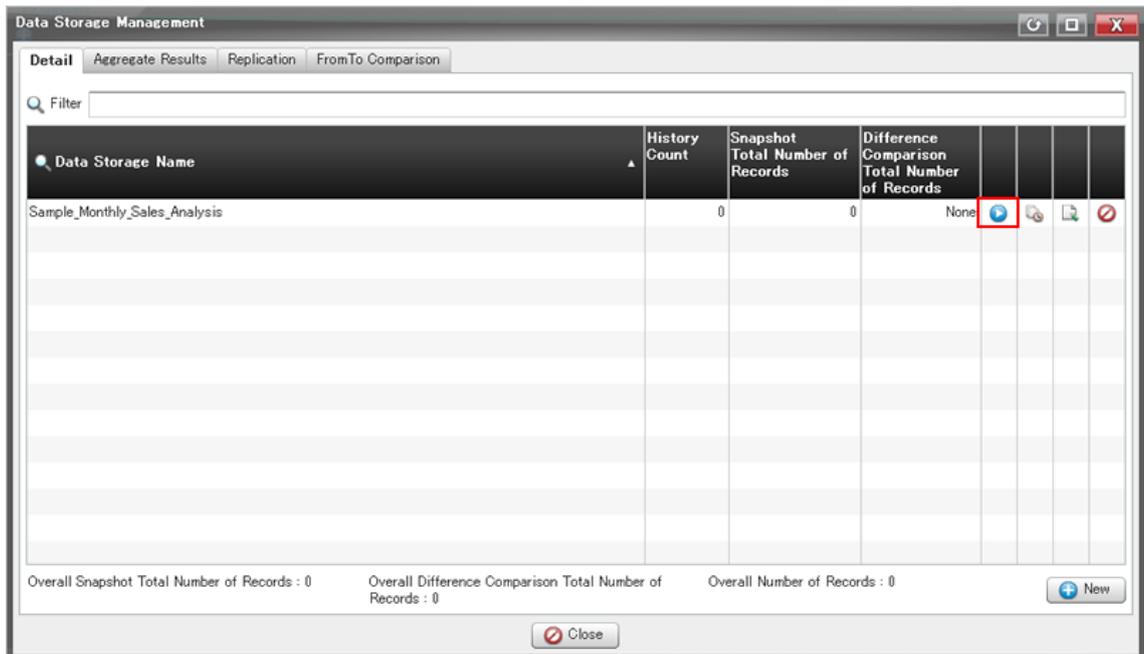
- 6. Click the **OK** button to set the schedule for storing data from the CSV file to data storage.



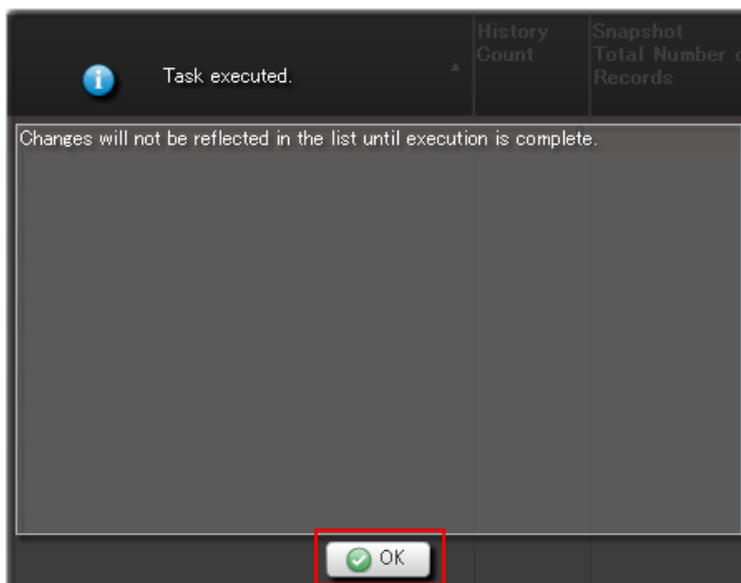
- 7. Click the **OK** button in the dialog.



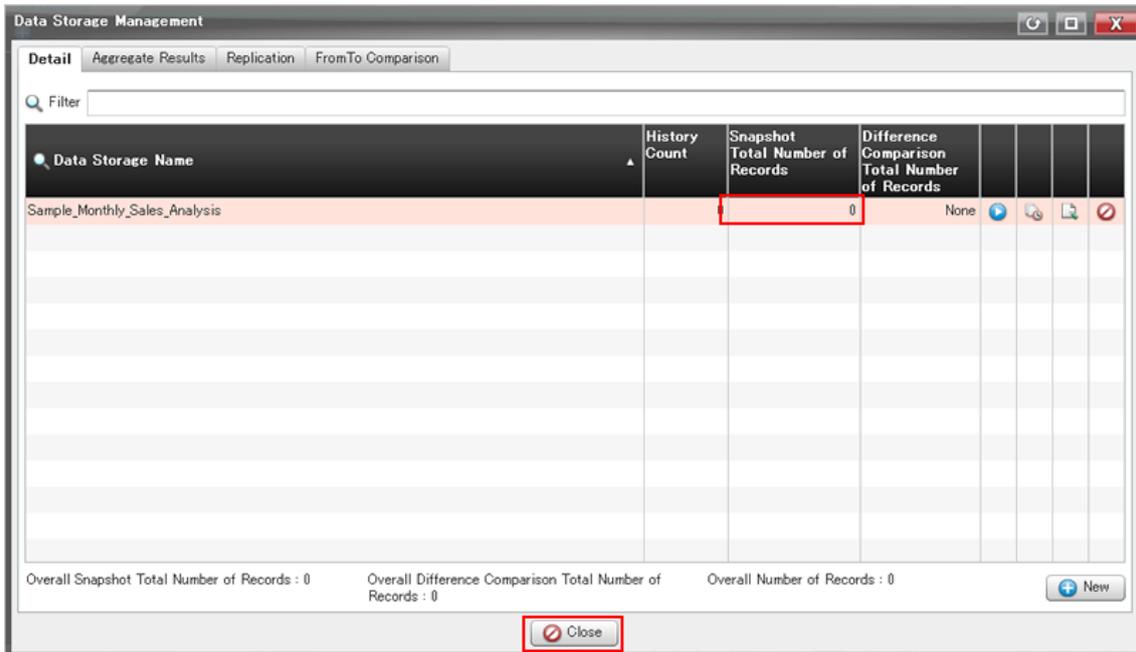
8. Click the **OK** button in the **Data Storage Advanced Settings** screen.
9. Click the  icon on the screen to run immediately before the schedule run set in the above step 6.



10. Click the **OK** button in the dialog.

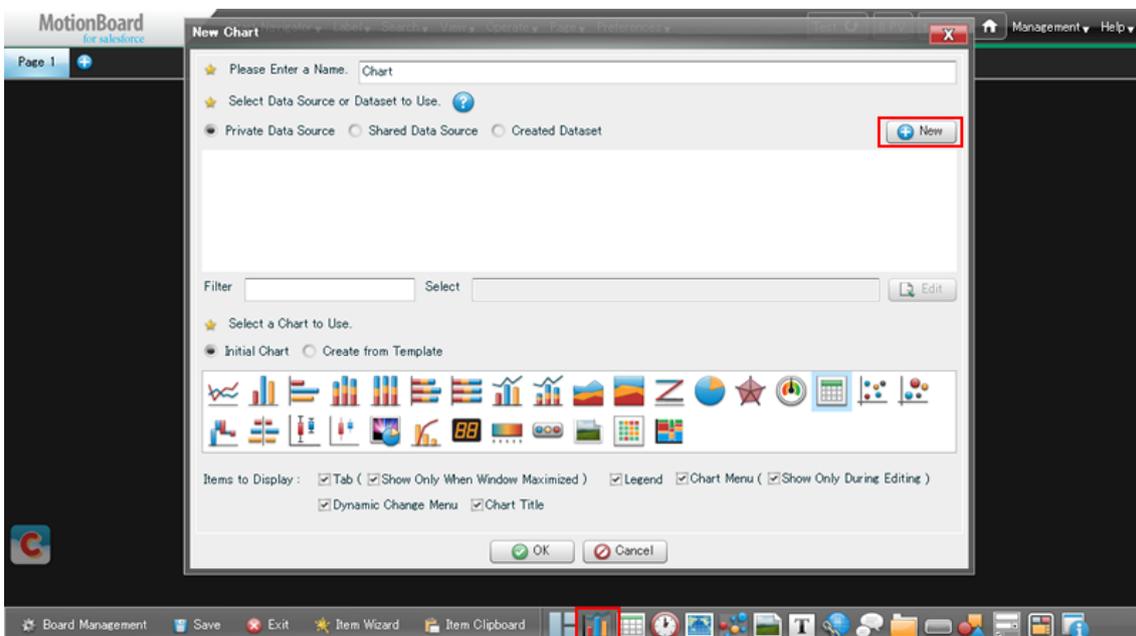


11. If storing data is successful, the number of total records will be reflected. After confirming, click the **Close** button.



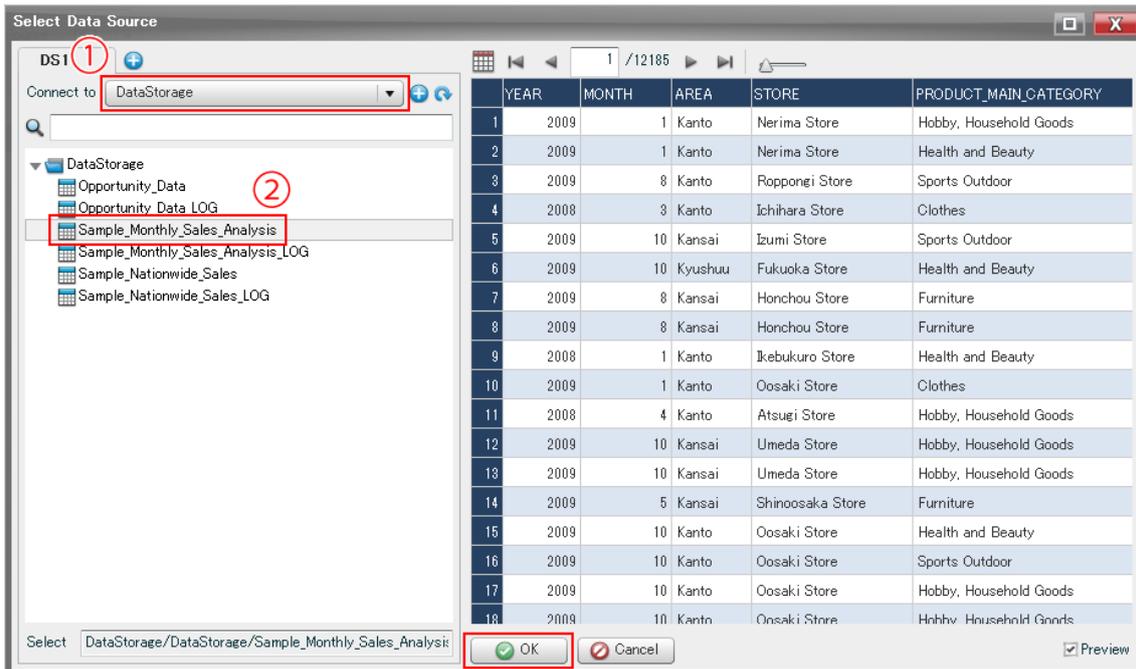
3. Creating a Chart

1. How to create a chart using data stored in "Data storage."
Click the chart icon on the bottom side of the board screen and place the chart on the board by drawing a rectangle. Click the **New** button in the new chart creation screen.

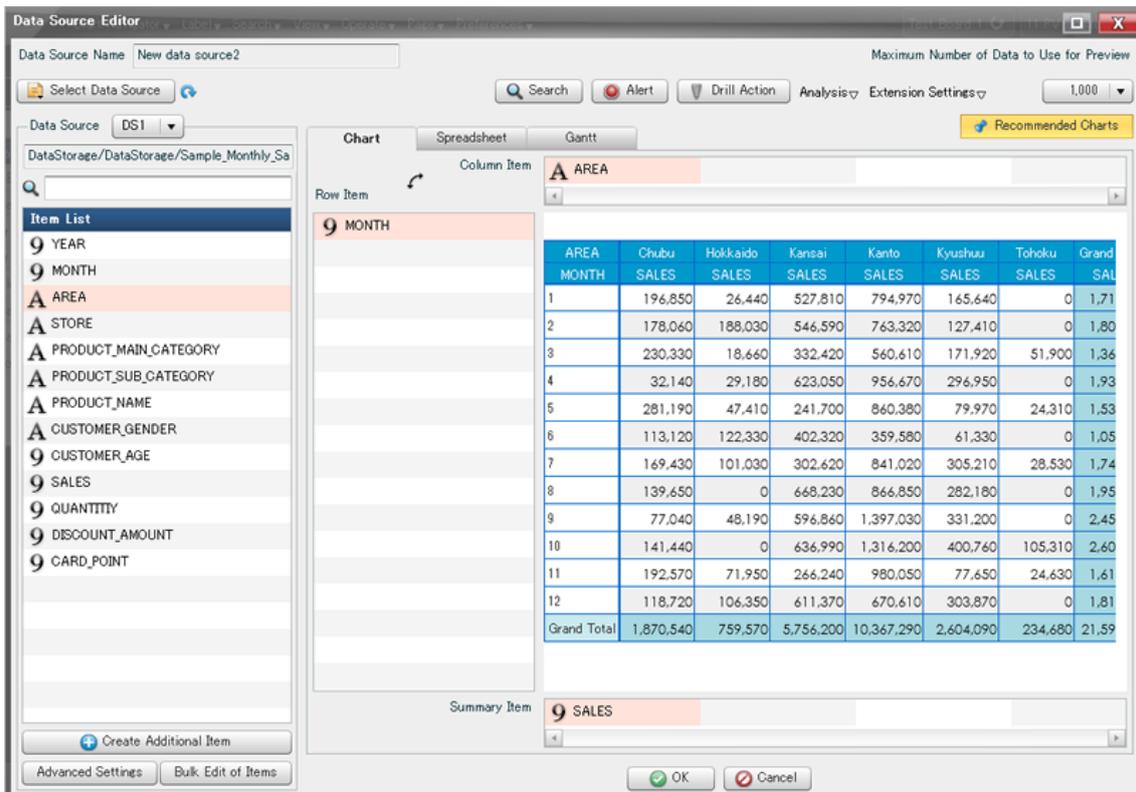


2. Set the data Source Selection screen as follows and click the **OK** button.
 - ① Select **Connect to: DataStorage**.

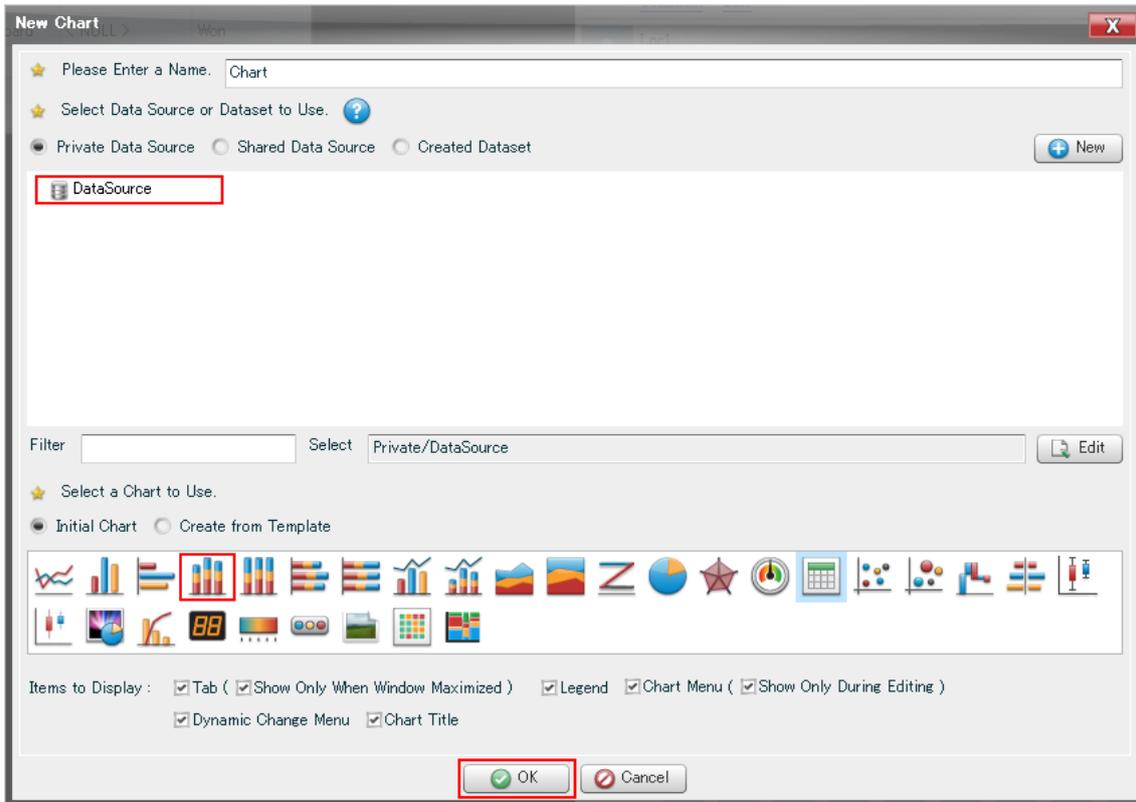
② Select the data storage name that you created.



3. In the Data Source Editor screen, set the items in rows, columns, and Summary fields, and then click the **OK** button.

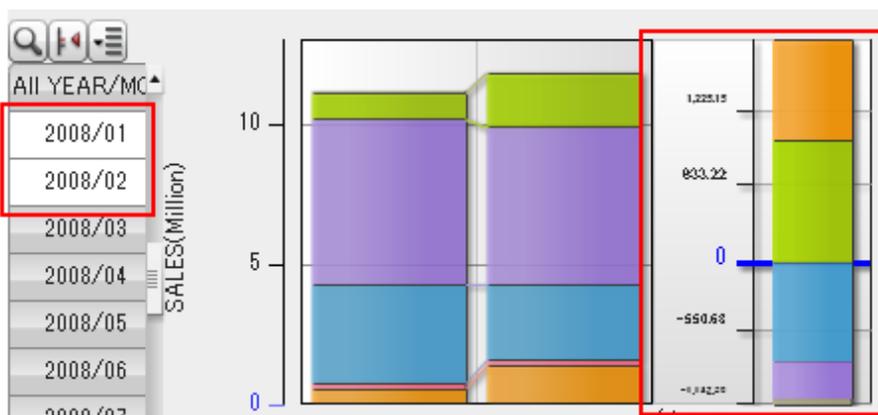


- Select the data source that you created, select the "Stacked Column" and click the **OK** button.



4. Time-series Analysis

- You can see the difference by switching the chart to a stacked column, and then selecting the two line items in the tab.



Difference

- If you have any questions about how to use the MotionBoard Cloud, please visit our support site at <https://spacetime-research.com/support/>.

<Inquiry Procedure>

Please see following page about how to send an inquiry.

<https://support.wingarc.spacetime-research.com/hc/en-us/articles/115003344983-How-to-submit-a-request>

Please find customer support guide for our support policy at <https://spacetime-research.com/sla/wingarccloud>.