

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 <u>"How to start using the service (or trial)</u>", which has been sent to you.)

salesforce
Username Password
Log In
Remember me Forgot Your Password? Use Custom Domain
Not a customer? Try for Free

- 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".



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

ł	Install MotionBoard for Salesforce By WingArc1st Inc.	
	Installation Complete!	
		Done

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

Installed Packages										Hel	o for this	s Page 🕜	
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.								n More about	Sale	force a	ppex	change	
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. Thi 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.							our users. This ly.				g		
Depending on the links next to an in	stalled package, y	you can take	different actions	s from this page.						Visit AppExchange »		nge »	
To remove a package, click Uninsta	all. To manage yo	our package li	icenses, click M	anage Licenses.									
Installed Packages	Installed Packages												
Action Packag	je Name Put	blisher V	ersion Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects
Uninstall Configure 📩 Motion	Board for Wir prce Inc.	ngArc1st 1	.21	MB4S	Active	Unlimited	0	Does not Expire	2017/06/30 21:34		1	1	1

6. 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 "<u>How to start using the service (or trial)</u>".

- 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	https://sfdc.variocloud.jp/motionboard/oauth2/salesforce/embedded
Environment	production V
My Domain	
Community Domain	
	Save

7. Click Save.

MotionBoard Settings	
URL	https://sfdc.variocloud.jp/motionboard/oauth2/salesforce/embedded
Environment	production V
My Domain	
Community Domain	
	Save



8. Click **OK**.

Message f	rom webpage		×
?	Are you sure?		
	ОК	Cancel	

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

Success: Saved Successfully	
MotionBoard Settings	
URL	Intps://sfdc.variocloud.jp/motionboard/oauth2/salesforce/embedd
Environment	production V
My Domain	
Community Domain	
	Save

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

salesforce	arch		Loc1 +	Setup	Help & Training	MotionBoard for Salesforce
Home MotionBoard + Create New	Success: Sund Succession MotionBoard Settings	My Profile My Settings Developer Console Switch to Lightning Exp Logout	erience			
Loc1 Recycle Bin	URL [https://bdc.vanocloud.gpimotorboard/c Environment production V My Domain Community Domain	auth2/salesforce/embedded]				
	Save					

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.

sales	sforce
Username	
Password	
Lo	g In
Remember me	
Forgot Your Password?	Use Custom Domain
Not a customer?	Try for Free



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

salesforce	Search	Loct	r v Setup Help & Training Sales v
Home Chatter Profile C	Coups Files Leads Accounts Contacts Opportunities Reports Loc1 Modery 2017/07/03 Modery 2017/07/07/03 Modery 2017/07/03	Dashboards Products Forecasts +	Service Marketing Saliesforce Chatter Community App Launcher
Recent Items	4- Hide Feed © Post 🗿 File 🖉 New Event More +	Recommendations	Content Site.com MotionBoard for Salesforce
Custom Links	Share an update, @mention someone Q. Sort By Latest Posts ~	Share Get The Salesforce 1 App Take Salesforce with you everywhere! Download the new Salesforce 1 Multiple App.	Checkout AppExchange Developer Community Success Community
Messages and Alerts	Loct changed Email from salesforce-Imo@wingarc.com to tateuchi.a@wingarc.com.	Google Play.	

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.

salesforce	h Search		Loc1 - Setup	Help & Training	MotionBoard for Salesforce
Home MotionBoard +					
Home Y S	Cart Navigator				tateuchia 🏦 Manarement + Help +
	This is a list of	all the boards Please select a Board to view.			
All My Boards My Boards (Al Users) W Boards (Al Users) W Boards (2020) My Boa	time Dut Duplay 💽 New 💽 Create a List				
		Create a new boa	ard.		

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 <u>Salesforce profile</u>

* 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 <u>Salesforce profile</u>
 - Connect from Salesforce to MotionBoard Cloud for Salesforce. Click **MotionBoard for Salesforce** from the Force.com application menu in the upper right.

salesforce	Search Search	Loct 👻 Setup	Help & Training Sales
Home Chatter Profile Gr Create New	Loc1 Monday 2017/07/03	Dashboards Products Forecasts +	Service Marketing Salesforce Chatter Community App Launcher
Recent Items	🐥 Hide Feed	Recommendations	Content Site com MotionBoard for Salesforce
Custom Links	Share an update, @mention someone Q Sort By Latest Posts ~	Share Get The Salesforce 1 App Take Salesforce with you everywhere! Download the new Salesforce! Mobile App	Checkout AppExchange Developer Community Success Community
messages and Alerts	Loc1 changed Email from salesforce-Imo@wingarc.com to tateuchi.a@wingarc.com.	from the Apple App Store and Google Play. Skin >	



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

solesforce	Loc1 +	Setup	Help & Training	MotionBoard for Salesforce
Home MotionBoard +				
Hone Start Naveshar				tateushia 🕂 Manarement + Help +
This is a list of all the boards Please select a Board to view.				
Al Dote Dote Diploy Create a new boa	rd.			

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

		n Management 🗸 Help 🗸
		🐻 Stored Data Management 🔹 🕨
		🙅 Group Information
	🏫 General	🕨 🕸 System Settings 💦 🔸
💄 User	👗 User	🔸 🞯 MotionBoard Agent Download
🐼 Group	🟺 Connection/Authentication	. •
🔑 Role	🤨 Security	Þ
T Start Page	lacktricition 😓 Notification	•
🤳 Named User	🛅 Data	•
	🚯 Information	•



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

System Settings							
🏠 General 🗸 📕 User 🗸 👙	Connection/Authentication 🗸	🖲 Security 🗸	🔈 Notification 🗸	盾 Data 🗸	🚯 Information 🗸		
Group 🕼						Import	Export
Domain local Filter Group ID	Group ID Users	Bulk Dele	te Selected Users	Domain local Q Filter List of U	ser IDs	4	
	- Role	elected Roles) Filter				
	Role Name		List of Role Na Admin Board Admin Data Download Essential User Guest User Mobile User Standard User				
🕤 N	lew		Add 📔 Save				



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

System Settings	_			💷 =× =
🛕 General 🗸 📕 🕹 Conn	ection/Authentication v	🖲 Security 🗸 🛛 👃 Notification 🗸	🚡 Data 🗸 🚯 Inform	nation v
Group 🕼				Import Export
Domain doc.com Q Filter Chatter Free User Chatter Moderator User Chatter Moly User Company Communities User Company Communities User	Group ID Standard Us Users User ID user01 user02	Ser Bulk Delete Selected Users Domain doc.com doc.com	Domain local Filter List of User IDs user 01 user 02	
Customer Community Login User Customer Community Plus Login Use Customer Community Plus User Customer Community User	user03 user04 user05 user06	doc.com doc.com doc.com	user03 user04 user05 user06	
High Volume Customer Portal User Marketing User Partner Community Login User Partner Community User Read Only	Role	elected Roles Q Filter	ames 🔺	
Solution Manager Standard Platform User Standard User System Administrator Work.com Only User		Data Download Essential User Guest User Mobile User Standard User		
S New	Ľ	Add 📔 Save	:	

6. 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".

<u>* The online manual can be viewed from **Help - Online Manual** at the top right of the MotionBoard screen.</u>



System Settings		_	_	_	_		X
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Group 🕼					:	import Exp	port
Domain doc.com Q Filter Chatter Free User Chatter Moderator User Chatter Moderator User Chatter Only User Company Communities User Company Communities User Company Communities User	Group ID Standard Us Users User ID user01 user02	ser Bulk Delet Dor doc.c.	e Selected Users nain om	Domain local C Filter List of U user01 user02	ser IDs		
Customer Community Login User Customer Community Plus Login Use Customer Community Plus User Customer Community User	user03 user04 user05 user06	doc.o doc.o doc.o doc.o	om I om	user03 user04 user05 user06			
High Volume Customer Portal User Marketing User Partner Community Login User Partner Community User Read Only Solution Manager Standard Platform User Standard User System Administrator Work.com Only User	Role Bulk Delete Se Role Name Board Admin	elected Roles	Eilter List of Role Na Board Admin Data Download Essential User Guest User Mobile User Standard User View User	omes 🔺			
New			Add 🔡 🔡 Save				

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

System Settings				💷 — ———————————————————————————————————
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Group 🕼				Import Export
Domain doc.com Q Filter Group ID	Group ID Standard Us Users	ser	Domain local v	
Chatter Free User		Bulk Delete Selected Use	rs Q Filter	
Chatter Moderator User Chatter Only User	User ID user01	▲ Domain doc.com	List of User IDs	
Company Communities User Contract Manager	user02 user03	doc.com doc.com	user02 user03	
Customer Community Login User Customer Community Plus Login Use	user04 user05	doc.com doc.com	user04 user05	
Customer Community Plus User Customer Community User	user06	doc.com	user06	
High Volume Customer Portal User Marketing User	Bulk Delete Se	elected Roles Q Filter		
Partner Community Login User	Role Name Board Admin	List of Rol Board Admin	e Names 🔺	
Read Only Solution Manager		Data Download		
Standard Platform User		Guest User	=	
Standard User System Administrator		Mobile User Standard User		
Work.com Uniy User		View User	Save	



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

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

salesforce	Search Search	Loct +	Setup Help & Training Sales •
Home Chatter Profile G	roups Files Leads Accounts Contacts Opportunities Report	s Dashboards Products Forecasts +	Service Marketing Salesforce Chatter Community Aco Laurcher
Recent Items	Hide Feed Post I File (2) New Event More +	Recommendations	Content Site.com MotionBoard for Salesforce
Custom Links Messages and Alerts	Share an update, @mention someone Q Sort By Latest Posts ~	Share Cet The Salesforce 1 App Take Salesforce with you everywherel Dominad the new Salesforce 1 Mobie App	Checkout AppExchange Developer Community Success Community
	Loc1 changed Email from salesforce-Imo@wingarc.com to tateuchi.a@wingarc.com.	Google Play.	

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





 Stored Data Management Group Information System Settings User User Ometion/Authentication Scurity Named User Information Information 			n Managemen	t 🕌 Help 🗸
Image: Construction of the con			🚯 Stored Data Manag	gement ▶
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LuserOtionBoard Agent DownloadGroupConnection/AuthenticationP RoleSecurityStart PageNotificationNamed UserDataInformationInformation		🏠 General	🕨 🛱 System Settings	×
Image: Group Image: Role Image: Start Page Image: Named User Image: Role Image:	💄 User	💄 User	🕨 🞯 MotionBoard Agen	t Download
P Role Security Start Page Notification Named User Data Information Notification	🙅 Group	🟺 Connection/Authentication	۶.	
Image Start Page Image Named User Image Data Image Da	🔎 Role	🤨 Security	5	
Named User The Data *	🗔 Start Page	🚴 Notification	•	
Information	👃 Named User	🖻 Data	•	
		 Information 	۶.	
			-	

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.

System Settings		x
🏠 General 🗸 🕹 User 🗸	🟺 Connection/Authentication 🖌 🛛 Security 🗸 🔈 Notification 🖌 📲 Data 🖌 🕕 Information 🗸	
Group 🕼	Import Export	
Domain local 💌 Q. Filter	Group ID Board_Admin_Group	
Group ID group01	▲ Domain local ▼	
eroup02 eroup03	User ID Domain List of User IDs	
group05	user02 user03	
grouped	user 05 user 06	
	Role	
	Role Name Admin Board Admin	
	Data Download Essential User	
	Guest User Mobile User Standard User	
	New Add 📔 Save	



- 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.

System Settings							1 X
🔒 General 🗸 🕹 User 🗸	🟺 Connection/Authentication 🗸	🖲 Security 🗸	🔈 Notification 🗸	🛅 Data 🗸	🕕 Information 🗸		
Group 🕼						Import	Export
Domain local 🔹	Group ID Board_Adm	in_Group]				
Q Filter	Users						
Croup ID	4			Domain doc.c	om 🛛 🔻		
group01		📓 Bulk Dele	te Selected Users	Q Filter			
group02	User ID	D	omain	🔍 List of U	ser IDs ▲		
group03				loc 1admin			
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group05				user01	-		
group06				user02		-	
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			Essential User	=			
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			Mobile User	-			
			Standard User	×			
6	New		, Add 📔 Save				



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

System Settings				💷 ——
🏠 General 🗸 🕹 User 🗸	🟺 Connection/Authentication 🗸	🖲 Security 🗸 🛛 👃 Notification	🗸 🖷 Data 🗸 🕕 Info	rmation v
Group 👉				Import Export
Domain local Group ID eroup01 eroup02 eroup03 eroup04 eroup05 eroup06	Group ID Board_Adr	nin_Group	Domain doc.com v Filter CList of User IDs loc1admin tateuchi.a user01 user02 user03	
	Role Role Name	Selected Roles Q Filter Admin Board Admin Data Download Essential User Guest User Mobile User Standard User	Names	

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."

<u>* The online manual can be viewed from **Help - Online Manual** at the top right of the MotionBoard screen.</u>



System Settings			_	_	-		
🏠 General 🗸 🕹 User 🗸	🟺 Connection/Authentication 🗸	🖲 Security 🗸	🔈 Notification 🗸	🛅 Data 🗸	🚯 Information 🗸		_
Group 👉						Import	Export
Domain local	Group ID Board_Adm	in_Group	te Selected Users Iomain Inc.com	Domain doc.c Filter List of U loc ladmin tateuchi.a user01 user02 user03 user04	ser IDs		
	Role	elected Roles	Filter List of Role Na Admin Board Admin Data Download Essential User Guest User Mobile User Standard User Add	ames			

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

System Settings	_		_	
🟫 General 🗸 🕹 User 🗸 💛 Cor	nection/Authentication ,	🖲 Security 🗸 🛛 💩 Notifi	cation 🗸 🖷 Data 🗸 🧃	Information v
Group 🕼				Import Export
Domain local C Filter Group ID eroup01 eroup02 eroup03 eroup04 eroup05 C	Group ID Board_Admin Users User ID loc ladmin	n_Group Bulk Delete Selected Domain doc.com	Domain doc.com Users Q. Filter Ioc ladmin tateuchia user 01 user 01	IDs
	RoleBulk Delete Se Role Name Board Admin	lected Roles Q Filter Admin Board Admi Data Downl	Role Names	
C New		Essential U Guest User Mobile User Standard U:	ser ser	



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



Creating Essential User Group

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

System Settings			_	_	l.	
🔒 General 🗸 🕹 User 🗸	🟺 Connection/Authentication 🗸	🖲 Security 🗸 🛛 👃 Notification 🗸	💼 Data 🗸	🚯 Information 🗸		
Group 🕼				I	mport	Export
Domain local C Filter Group ID Board_Admin_Group group01 group02	Group ID Essential_L Users	Jser_Group Bulk Delete Selected Users Domain	Domain loca Q Filter List of U user01	Iser IDs		
eroup03 eroup04 eroup05 eroup06			user02 user03 user04 user05	=		
	Role Bulk Delete Se	elected Roles	user 06			
	Role Name	List of Role N Admin Board Admin Data Download Essential User Guest User Machine User	ames 🔺			
	New	Standard User	•			

2. 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.

System Settings	
🔒 General 🗸 🛛 💄 User 🗸	👙 Connection/Authentication 🗸 🛛 🤨 Security 🗸 🔥 Notification 🖌 📲 Data 🖌 🕕 Information 🗸
Group 🕼	Import Export
Domain local 🛛 🗸	Group ID Essential_User_Group
Group ID Board_Admin_Group	▲ Domair local ▼ ■ Bulk Delete Selected Users Q Filter
group01 group02	User ID Domain List of User IDs
group04	user02
eroup05	user04
group06	user 05
	Role
	Bulk Delete Selected Roles Q Filter
	Role Name
	Admin
	Board Admin
	Eccential User
	Guest User
	Mobile User
	Standard User
	New Add Save



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

System Settings				💷 💌
🔒 General 🗸 🕹 User 🗸	🟺 Connection/Authentication 🗸	🖲 Security 🗸 🛛 👃 Notificati	on 🗸 🖷 Data 🗸 🕕 Inform	nation v
Group 👉				Import Export
Domain local	Group ID Essential_U	ser_Group	Domain doc.com V	
group01		Buik Delete Selected Use	ers Q Filter	
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eroup05			user02	-
group06			user03	
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		Data Download		
		Essential User	Ξ	
		Guest User		
		Mobile User	_	
		Standard User		
	New	🔒 Add 📔	Save	

4. 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".

<u>* The online manual can be viewed from **Help - Online Manual** at the top right of the MotionBoard screen.</u>



System Settings			_	_		
🏠 General 🗸 🕹 User 🗸	🟺 Connection/Authentication 🗸	🖲 Security 🗸	🔈 Notification 🗸	🛅 Data 🗸	🚯 Information 🗸	
Group 🕼					In	iport Export
Domain local	Group ID Essential_U Users Users ID loc 1admin	iser_Group	te Selected Users omain c.com	Domain doc.cl Q Filter List of Us loc ladmin tateuchi.a user01 user02 user03 user04	om V	
	Role Mame Essential User	elected Roles	List of Role N. Admin Board Admin Data Download Essential User Guest User Mobile User Standard User	ames 🔺		

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

System Settings				💷 =
🏠 General 🗸 🕹 User 🗸	븧 Connection/Authentication 🗸	🖲 Security 🗸 🛛 👃 Notification 🕯	🗸 🖷 Data 🗸 🕕 Informa	ition v
Group 👉				Import Export
Domain local	Group ID Essential_U	ser_Group	Domain doc.com 🔻	
group01	User ID	Domain	List of User IDs	A
eroup02	loc 1admin	doc.com	loc ladmin tateuchi.a	
group04			user01	
eroup05 eroup06			user02 user03	
			user04	
	Role Mame Essential User	Hected Roles Q Filter Admin Board Admin Data Download Essential User Guest User Mobile User Standard User	Names 🔺	
•	New	🕞 Add 📔 Sa	ve	



6. 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.

1. Log in to Salesforce.

Username	
Password]
Log In	
Remember me	
Forgot Your Password? Use Custom Domai	n
Not a customer? Try for Free	

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

salesforce 2 Search. Search	Loc1 👻 Set	tup Help & Training Sales •
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Lot1 Post If File IN New Event More + Custom Links Share an update, @mention someone Messages and Alerts Sort By Latest Posts * Loc1 charged Email from salesbore-imo@wingarc.com to islevchi.a@wingarc.com.	Share Cet The Salesforce VII Take Salesforce VII Take Salesforce VII Topic everywhere! Download the new Salesforce! Noile App tom the Apple App Store and Coople Hay. Skin >	Sile com MotonBoard for Salesforce Checkout AppExchange Developer Community Success Community



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 iii 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 vaiocloud.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:

 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>

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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.

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

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Quick Find / Search 🕜 🔍 Expand All Collapse All	Profile Help for this Page 😔 System Administrator 4 Back to List: Users
	Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile. Looin IP Rances (0) Enabled Access (1) Enabled Visualforce Pace Access (2) Enabled External Data Source Access (2) Enabled Named Credential Access (2) Enabled Service Presence Status Access (3) Enabled Custom Permissions (3)
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No login IP ranges specified. Users from an	ny IP address are allowed to	log in.	
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- 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.





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No login IP ranges specified. Users from a Enabled Apex Class Access Apex Class Name	Edit	g in. AppExchange Package Name	Enabled Apex Class Access He

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.

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‰ → <i>¶</i>	Save Cancel	
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Migration Assistant Switch to the modern, intelligent Salesforce. Get Started	Start IP Address 0.0.0	End IP Address 255 255 255
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Force.com Home		

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.

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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.



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Get Started		
alestered Quick Start	Save Canc	et

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.

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

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

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

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	Manage Communities		Use Team	Reassignment Wizards		
	Manage Custom Permissions			View All Data		
	Manage Custom Report Types			View All Users		
	Manage Dashboards in Public Folders		View and	Edit Converted Leads		
	Manage Data Categories		View Dashb	oards in Public Folders		
	Manage Data Integrations		View I	Data Categories		
	Manage Dynamic Dashboards		Vie	w Health Check		
	Manage Email Client Configurations			View Help Link	1	
	Manage Encryption Keys		View R	eports in Public Folders		
	Manage Health Check			View Setup and Configuration		
	Manage Internal Users		Wee	kly Data Export		
	General User Permission	15				
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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.

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

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- 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

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	Profile Edit Save Cancel	
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	Visualforce Page Name	AppExchange Package Name
	MB4S.MotionBoardSettingStartView	MotionBoard for Salesforce
	MB4S.MotionBoardSettingView	MotionBoard for Salesforce
	MB4S.MotionBoardView	MotionBoard for Salesforce
	Enabled External Data Source Access	Enabled External Data Source Access Help 🤶
	No External Data Sources enabled	

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**.

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

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Adoption Manager	Edit Clone	Standard Platform User	Salesforce Platform		
Mass Email Users	Edit Clone	Standard User	Salesforce		
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Permission Sets	Edit Del	Test N	Salesforce	1	
Profiles	Edit Clone	Work.com Only User	Work.com Only		
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3. Click **Edit** for the target profile. (Modifies the profile of "Test N" in this case.)

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WUEUES CONTRACTOR	Public Groups Queues	1-23 of 23 💌 0 Selected 💌	44 4 Previous Next H M		Page 1 of

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

salesforce	Search Sear	ch	Loc1 👻 Setup Help	& Training	MotionBoard for Salesforce
Home MotionBoard +					
Quick Find / Search 🕐 Q	Profile Edit Test N				Help for this Page 🕢
३३ → १	Set the permissions and page layou	uts for this profile.			
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Outbound Messages Time-Based Workflow	Access Chatter For SharePoint		Manage IP Addresses		
Automated Process Actions	Access Community Management		Manage Knowledge Article Import/Export		
API Usage Notifications	Access Libraries	V	Manage Letterheads		
Mass Emails	Add People to Direct		Manage Lightning Sync		
Email Snapshots Jobs	Allow Inclusion of Code Snippets from UI		Manage Login Access Policies		
Logs	API Enabled	V	Manage Macros Users Can't Undo		
neckout	Api Only User		Manage Mobile Configurations		
IIEVROM.	Assign Permission Sets		Manage Package		
Checkout			Licenses		

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

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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.

Home MotionBoard +	_			
Quick Find / Search Ø Q Expand All Collapse All	Passwor Set the passwo	d Policies d restrictions and login lockout policies for all users.		Help for this Page 🥑
$33 \rightarrow 7$	Password P	olicies		= Required Information
Lightning Experience Migration Assistant Switch to the modern, intelligent Salesforce.	User passwords expire in Enforce password bistory	90 days V 3 passwords remembered V		
Get Started	Minimum password length	8		
Salesforce1 Quick Start	Password complexity requirement	Must mix alpha and numeric characters	~	
Force.com Home	Password question requirement	Cannot contain password V		
Administer	Maximum invalid login attempts	10 🗸		
Manage Users Manage Apps	Lockout effective period	15 minutes V		
Manage Territories Company Profile Security Controls	Obscure secret answer for password resets			
Health Check Sharing Settings Field Accessibility	Require a minimum 1 day password			
Password Policies Session Settings Login Flows	Allow use of setPassword () API for self-resets	N		



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

Home MotionBoard +		
Quick Find / Search ② Q. Expand All Collapse All	Password Policies Set the password restrictions and login lockout policies for all users.	Help for this Page 🥹
\$\$ > ¥	Password Policies	= Required Information
Lightning Experience Migration Assistant	User passwords expire in	
Switch to the modern, intelligent Salesforce.	Enforce password 3 passwords remembered V history	
Get Started	Minimum password length	
alesforce1 Quick Start	Password complexity Must mix alpha and numeric characters requirement	
orce.com Home	Password question requirement	
dminister	Maximum invalid login attempts	
Manage Users Manage Apps	Lockout effective period	
Manage Territories	Obscure	

4. Click the **Save** button.

Network Access	
Activations	Forgot Password / Locked Account Assistance
Session Management Login Access Policies Certificate and Key Management Single Sign-On Settings Auth. Providers	Message Help link Forgot password preview If you still can't log in, try the following: Contact your company's administrator for assistance. Locked account preview To re-enable your account, try the following: Contact your company's administrator for assistance.
Identity Provider	API Only User Settings
View Setup Audit Trail Expire All Passwords	Alternative Home Page
Remote Site Settings CSP Trusted Sites Named Credentials	Save

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."

<u>* The online manual can be viewed from **Help - Online Manual** at the top right of the MotionBoard screen.</u>

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



New storce profiles as	groups [7]
Domain ID	•
External Connection	salesforce V
	New 🖉 Cancel

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

System Settings		en causaces 💷 🛛 🗮
💧 General 🗸 💄 User 🗸 🛛 煤 Con	nection/Authentication 🗸 🔍 Security 🗸 🔈 Notification 🖡 🖷 Data 🗸 🚯 Information 🖡	
Authentication 🕼		Import Export
Authentication Name Type Local Local salesforce Salesforce	Basic Information External Authentication Name salesforce External Authentication Type Salesforce	
	— Option Settings Use Salesforce profiles as groups ☑ Use Salesforce roles as groups ☑ Domain Settings	• New
	Domain ID Connection External Connection Use	Delete
	salesforce	13
	watcs watcs salesforce 🗹	1

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." <u>* The online manual can be viewed from **Help - Online Manual** at the top right of the MotionBoard screen.</u>

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?
 Places log in as the SEDC 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 "<u>2. Salesforce Login IP Address Restriction Settings</u>" 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.
- 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." <u>* Online manuals can be viewed from **Help - Online Manual** at the top right of the <u>MotionBoard screen.</u></u>

- 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.



2. Creating Data Storage

1. From the **Edit Board** screen, click **Management** - **Shared Item Management** at the top right of the screen.

* The Data Storage Management menu is displayed in "Board editing mode".

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Board Management	🍯 Save	😒 Exit	🌟 Item Wizard	🖺 Item Clipboard) 🕋 🐝 🖿 1	1	R 🤖			-	

Select the CSV/Excel tab in the Shared Items Management screen, click the Upload button, select the appropriate CSV file, and then upload the file to file storage.
 *As an example, we are uploading the following "Sample Monthly Sales Analysis.csv".

Shared Items Management						
Excel Report V PowerPoint R Chart V Spreadsheet V Ima	Report re V Text V Link V Shared Folder	V Signboard/Comment V Menu	V Data Source	CSV/Excel	mage Map $\sqrt{ ext{GEC}}$	
Keyword					🔍 Search 🛛	💫 Upload 🔒
<pre></pre>	Name		Size	Date Modified	Last Update User	Descripti on
	Filter:					



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.

MotionBoard	Sta	art Navigator	🖌 Labely Searc	h y View y Operatey	Page 🗸 Preferenc	es¥	Test 🗸	0 PV tate	uchia 🏦 Managementy Hel	••
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									👫 Group Information	
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									🛒 Mobile View	
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Board Management	🗑 Save	🔕 Exit	🌟 Item Wizard	隋 Item Clipboard		🕑 🕋 🥩 🖿	• II	P 🗖 🖛) 🛃 🚍 🔚 🟹	

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

Data Storage Management		_	_		6 🗆 💌
Detail Aggregate Results Replication FromT	o Comparison				
Q Filter					
🔍 Data Storage Name	*	History Count	Snapshot Total Number of Records	Difference Comparison Total Number of Records	
Overall Snapshot Total Number of Records : 0	Overall Difference Comparison Total Number Records : 0	r of Ov	verall Number of Reco	rds : 0	🕒 New
	Olose				

- 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.

Select Data Source	_	-	_	-	_	💷 💌
DSI 1		4	1 /12185	▶ ▶	<u>~</u>	
Connect to text	00	YEAR	MONTH	AREA	STORE	PRODUCT_MAIN_CATEGORY
Q	1	2009	1	Kanto	Nerima Store	Hobby, Household Goods
	2	2009	1	Kanto	Nerima Store	Health and Beauty
Sample	3	2009	8	Kanto	Roppongi Store	Sports Outdoor
🕨 📄 inside	- 4	2008	3	Kanto	Ichihara Store	Clothes
Sample Monthly Sales Analysiscsv	mport Settin	es(DS1)				orts Outdoor
(2)	Character Cod	le		Shift JIS	Iv]	alth and Beauty
	Separator			Comma S	enarated -	miture
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	Item Quotation	` /		Double Q	uotation 🔻	alth and Beauty
	With Header			*		othes
	Date Format			YYYY/MM	/DD	oby, Household Goods
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	Rows to Read	to Determin	e Data Type	1,000	•	bby, Household Goods
						miture
						alth and Beauty
			О К	🖉 Cance		orts Outdoor
		2003	10	Nanio	OUSAKI STORE	nobby, Household Goods
text/Sample Monthly Sales Analysis.csv	18	2009	10	Kanto	Oosaki Store	Hobby Household Goods
Import Settings		ОК	🖉 Cancel]		🗌 High-Capacity Data 🕐 🗹 Preview

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

Data Storage Advanced	Settings(Detail)							X
Data Storage Name :	Sample_Monthly_Sales_Analysis							
Reference Path :	text/Sample Monthly Sales Analysis.csv							
Settings :	Select Table Filter Condition							
Executing User :	local							
Maximum History Count :	10 - Maximum Number of Records at Once : Unlimited O Number of Records 1000							
Auto Create Item :	Date-Time Year Month Day Hour Milliseconds							
Difference Comparison :	Use Advanced Settings Comparison Target Generation Number :							
Schedule								
Period of Execution : S	tart Date 2017/07/31 📰 End Date 📰 🥒 Clear End Date	•	\$ 201	7.		7		
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		16	17	18	19	20	21	22
		23	24	25	26	27	28	29
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16:15	2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18	19	20	21	22	2 1	23	24
	Δ.							_
	OK Cancel							

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



•	Successfully saved Data Storage.		
	ОК		

- 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.

Data Storage Management		_	_			G		X
Detail Aggregate Results Replication FromTo	o Comparison							
Q Filter								
🔍 Data Storage Name		History Count	Snapshot Total Number of Records	Difference Comparison Total Number of Records				
Sample_Monthly_Sales_Analysis		0	0	None	٥	6	R.	0
Overall Snapshot Total Number of Records : 0	Overall Difference Comparison Total Number Records : 0	rof Ov	erall Number of Reco	rds : 0			🔁 Ne	914
	Olose							

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

•	Task executed.	A	History Count	Snapshot Total Number of Records
Changes will no	t be reflected in the list unt	il executi	on is complete	э.
-		K		
		IK I		



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

Data Storage Management		_		-		G		X
Detail Aggregate Results Replication FromTo	Comparison							
Q Filter								
🔍 Data Storage Name		History Count	Snapshot Total Number of Records	Difference Comparison Total Number of Records				
Sample_Monthly_Sales_Analysis			0	None	٥	G		0
Overall Snapshot Total Number of Records : 0	Overall Difference Comparison Total Number Records : 0	rof O	verall Number of Recor	ds : O			•	lew
	Olose							

3. Creating a Chart

 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.

MotionBoard for salesforce	New Chart Menterine - Labely Boards - View - Operate - Poper- Preferences -		nn management v Help v
Page 1 🕤	👷 Please Enter a Name. Chart		
	👷 Select Data Source or Dataset to Use. 👔		
	Private Data Source	S New	
	Filter Select	Edit	
	👷 Select a Chart to Use.		
	Initial Chart O Create from Template		
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	Items to Display : Tab (Show Only When Window Maximized) Elegend Chart Menu (Show Only During Editing)	
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	OK Orander		
Board Management	📱 Save 🔉 Exit 🌸 Item Wizard 👔 Item Clipboard 🔢 👫 🎹 💷 🕐 🕋 💒 🚞	🔟 🍣 🏞 📛 📼 🤞	L 🖃 🔳 🐻

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



② Select the data storage name that you created.

Select Data Source						💷 🎞
		⊲ ⊲	1 /12185	▶ ▶	<u>^</u>	
Connect to DataStorage 🛛 🗸 🔂 📀		YEAR	MONTH	AREA	STORE	PRODUCT_MAIN_CATEGORY
Q	1	2009	1	Kanto	Nerima Store	Hobby, Household Goods
DataStorage	2	2009	1	Kanto	Nerima Store	Health and Beauty
Opportunity_Data	3	2009	8	Kanto	Roppongi Store	Sports Outdoor
Opportunity Data LOG	4	2008	3	Kanto	Ichihara Store	Clothes
Sample_Monthly_Sales_Analysis	5	2009	10	Kansai	Izumi Store	Sports Outdoor
Sample_Monthly_balles	6	2009	10	Kyushuu	Fukuoka Store	Health and Beauty
Sample_Nationwide_Sales_LOG	7	2009	8	Kansai	Honchou Store	Furniture
	8	2009	8	Kansai	Honchou Store	Furniture
	9	2008	1	Kanto	Ikebukuro Store	Health and Beauty
	10	2009	1	Kanto	Oosaki Store	Clothes
	-11	2008	4	Kanto	Atsugi Store	Hobby, Household Goods
	12	2009	10	Kansai	Umeda Store	Hobby, Household Goods
	13	2009	10	Kansai	Umeda Store	Hobby, Household Goods
	14	2009	5	Kansai	Shinoosaka Store	Furniture
	15	2009	10	Kanto	Oosaki Store	Health and Beauty
	16	2009	10	Kanto	Oosaki Store	Sports Outdoor
	17	2009	10	Kanto	Oosaki Store	Hobby, Household Goods
	18	2009	10	Kanto	Oosaki Store	Hohhy Household Goods
Select DataStorage/DataStorage/Sample_Monthly_Sales_Analysix		🔊 ОК 📄	🖉 Cancel)		Preview

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

Data Source Editor	iony Operatoy	Pacey Preferencesy	_	_	_	-	16	a Deard 1 G		x
Data Source Name New data source2							Maximum	Number of D	ata to Use fo	r Preview
📄 Select Data Source 💦		Q S	earch 🧕 🧕	Alert	Drill Action	Analysis		Settings⊽		.000 -
Data Source DS1 V			.					🕜 R	ecommended	Charts
DataStorage/DataStorage/Sample_Monthly_Sa	Chart	Spreadsheet	Gantt							
9		Column Item	A AREA							
Them List	Row Item		4							Þ
Q YEAR	9 MONTH		_							_
Q MONTH			AREA	Chubu	Hokkaido	Kansai	Kanto	Kyushuu Sal ES	Tohoku	Grand
A AREA			1	196.850	26,440	527,810	794,970	165,640	0	1,71
A STORE			2	178,060	188,030	546,590	763,320	127,410	0	1,80
A PRODUCT_MAIN_CATEGORY			3	230.330	18.660	332.420	560.610	171,920	51,900	1,36
A PRODUCT_SUB_CATEGORY			4	32,140	29,180	623,050	956,670	296,950	0	1,93
A PRODUCT_NAME			5	281,190	47,410	241,700	860,380	79,970	24,310	1,53
A CUSTOMER_GENDER			6	113,120	122,330	402,320	359,580	61,330	0	1,05
9 CUSTOMER_AGE			7	169,430	101,030	302.620	841,020	305,210	28,530	1,74
9 SALES			8	139,650	0	668,230	866,850	282,180	0	1,95
9 QUANTITY			9	77,040	48,190	596,860	1,397,030	331,200	0	2,45
9 DISCOUNT_AMOUNT			10	141,440	0	636,990	1,316,200	400,760	105,310	2,60
9 CARD_POINT			11	192,570	71,950	266,240	980,050	77,650	24,630	1,61
			12	118,720	106,350	611,370	670,610	303,870	0	1,81
			Grand Total	1,870,540	759,570	5,756,200	10,367,290	2,604,090	234,680	21,59
		Summary Item	9 SALES							
G Create Additional Item			4							Þ
Advanced Settings Bulk Edit of Items				📀 ОК	🛛 🖉 Ca	ncel				



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

New Chart ILS Won	X
👷 Please Enter a Name. Chart	
👷 Select Data Source or Dataset to Use. 🕜	
Private Data Source O Shared Data Source O Created Dataset	🕒 New
T DataSource	
Filter Select Private/DataSource	Edit
👷 Select a Chart to Use.	
Initial Chart O Create from Template	
	<u>-</u>
Items to Display : 🗹 Tab (🗹 Show Only When Window Maximized) 🛛 🗹 Legend 🖉 Chart Menu (🗹 Show Only During Editing)	
Dynamic Change Menu DChart Title	
OK Cancel	

4. Time-series Analysis

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





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

<Inquiry Procedure>

Please see following page about how to send an inquiry.

https://support.wingarc.spacetimeresearch.com/hc/en-us/articles/115003344983-How-tosubmit-a-request

Please find customer support guide for our support policy at <u>https://spacetimeresearch.com/sla/wingarccloud</u>.