

GEMINID
SYSTEMS INC
DATA EXPLORER

2017 User Guide

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1. Introduction

Geminid Systems, Inc Data Explorer (Data Explorer) is a powerful tool which allows users to quickly view all of their Salesforce data in 1 simple page. Data Explorer allows users to create custom lists for private or public use. The custom listings give great flexibility and easy access to key Salesforce data which is otherwise difficult to access. Data Explorer allows for much data to be quickly exported via the Export Data feature. This feature allows for easy export in only a few clicks.

The user guide below contains more details on how all the feature of Data Explorer can be leveraged by your business.

2. User Setup

After installation, only System Administrators have access to the Data Explorer Application. To grant access to additional users, assign the Data Explorer permission set any users who will use the application.

To assign the Permission Set, go to Setup > Manage Users > Permission Sets. Select “Data Explorer Permissions” > Manage Assignments. Once on the Manage Assignments page, users can be added or removed from the permission set.

Once the permission set is assigned, the user has full access to all the associated components in Data Explorer, and will see Data Explorer in their application select dropdown.

3. Authentication

Geminid Systems, Inc Data Explorer allows user to export data from Salesforce in a few clicks. To get started, user must authenticate Salesforce account in the Data Explorer.

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Report Issue | Help ?

Authenticate Salesforce

View Requests

☐	Name	API Name	Count	Memory ▾
☐	Badges	WorkBadgeDefinition	12	24KB
☐	Access	WorkAccess	12	24KB

From the 'Authenticate Salesforce' option, user can link Salesforce account with the Data Explorer and select 'Allow' to grant Data Explorer the access to Salesforce account for data export.

4. List Functionality

Geminid Systems, Inc Data Explorer allows users to view all of their Salesforce data in a comprehensive way. The list view in Data Explorer is modeled after the built-in Salesforce views, making it familiar with existing salesforce users.

4.1. List View

When a view is selected, the list of records shown is updated to reflect the selection. The default views will show all the records for each object that are visible to the current user. For example, when “Select All” is selected, the user will see a list containing all the Attachments that are visible to that user

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Report Issue | Help ?

Authenticate Salesforce

View Requests

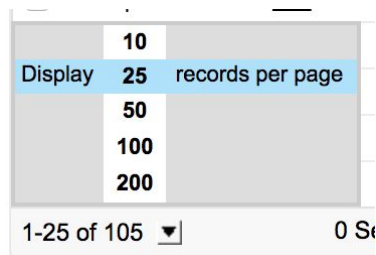
☐	Name	API Name	Count	Memory ▾
☐	Badges	WorkBadgeDefinition	12	24KB
☐	Access	WorkAccess	12	24KB
☐	Opportunities	Opportunity	8	16KB
☐	Contacts	Contact	7	14KB
☐	Leads	Lead	4	8KB
☐	Accounts	Account	3	6KB
☐	Cases	Case	3	6KB
☐	Contracts	Contract	1	2KB
☐	Orders	Order		
☐	Documents	Document		
☐	Campaigns	Campaign		0B

4.2. Pagination Controls

The user can navigate between pages using the pagination controls. The “First” button loads the first page in the list. The “Previous” button loads the previous page. The “Next” button loads the next page. The “Last” button loads the last page in the list. The buttons may be disabled if no page exists in that direction.

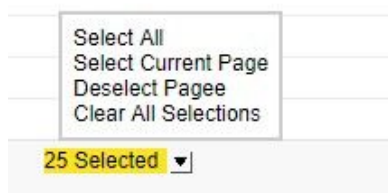


By default, 25 records are shown per page. Just like standard Salesforce lists, the user can change the number of records per page by selecting the dropdown menu in the bottom-left of the table. The user may select 10, 25, 50, 100, or 200 records per page.



4.3. Selection Controls

Data Explorer allows the user to select pages from the list. The selected tables can be attached to an outgoing email message (See section 5). The selection summary is displayed at the bottom of the list. This summary shows the number of tables currently selected across all pages. The selection controls allow the user to clear all selected rows via the “Clear Selection” link. Additionally, the selection controls allows for the selection/deselection of the current page using the “Select Page” and “Deselect Page” links.



5. Export Settings

Once the user is done with selecting the tables for exporting, the user can further modify the table export according to own preference of timing, frequency and location.

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DATA EXPLORER

Go Back

Schedule Export

Export Now

Export Settings

Email Notification Recipients 

abc@geminidsystems.com,xyz@geminidsystems.com

Google Drive 

☒

Google Folder 

Folder_name

Dropbox 

Authenticate

5.1. Email Notification Recipients

Data Explorer sends notification of data export to all who need to be informed. The user can feed Email addresses (minimum 1) of all those who should receive intimation. To enter multiple email IDs, separate them with semicolon and the Data Explorer does the rest.

GEMINID SYSTEMS INC DATA EXPLORER

[Go Back](#)[Schedule Export](#)[Export Now](#)

Export Settings

Email Notification
Recipients 

abc@geminidsystems.com,xyz@geminidsystems.com

5.2. Export Location

User can set the preferred location for export in a single click by choosing:

- Google Drive
- Dropbox

and authenticating the same with their Google Drive/ Dropbox credentials by clicking on the 'Authenticate' option.

GEMINID SYSTEMS INC DATA EXPLORER

[Go Back](#)[Schedule Export](#)[Export Now](#)

Export Settings

Email Notification
Recipients 

abc@geminidsystems.com,xyz@geminidsystems.com

Google Drive 



Google Folder 

Folder_name

Dropbox 

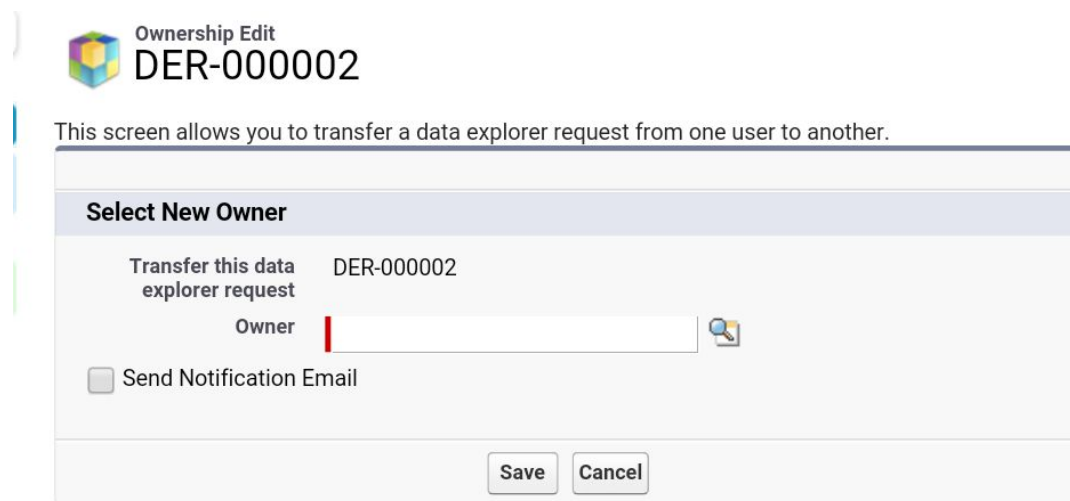
[Authenticate](#)

User can then mark 'check' Google Drive, Dropbox or both for selecting the respective export location and provide a folder name in the 'Google Folder' or 'Dropbox Folder' section. The Data

Explorer will create a folder by same name if it does not exist already and export the data within seconds.

5.2.1. Changing the Owner

User can change the user account by choosing the 'Change Owner' option from the right end of the Export Settings.



The image shows a dialog box titled "Ownership Edit" with a sub-header "DER-000002". Below the title, a message states: "This screen allows you to transfer a data explorer request from one user to another." The main section is titled "Select New Owner" and contains the following elements:

- A label "Transfer this data explorer request" followed by the text "DER-000002".
- A label "Owner" followed by a text input field and a magnifying glass icon.
- A checkbox labeled "Send Notification Email".
- At the bottom, there are two buttons: "Save" and "Cancel".

By putting in different user ID and saving it from 'Save' button, the user can proceed to export data to another account's Google Drive or Dropbox.

5.3. Go Back Button

User can go back and revise the table selections which are required to be exported.



The image shows a header section for "GEMINID SYSTEMS INC DATA EXPLORER". Below the header, there is a row of three buttons: "Go Back", "Schedule Export", and "Export Now".

5.4. Schedule Export Button

One can easily schedule the table export as per own convenience from the 'Schedule Export' button.

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DATA EXPLORER

Go Back Save

Starts On [7/17/2017 12:32 AM]
Repeats
Repeat Time
Never Ends ☐
Ends On [7/17/2017 12:32 AM]

From 'Starts On', user can schedule the start date from which the data export should happen.From 'Repeats' the user can select the frequency of data export i.e. Daily, Weekdays, Odd Weekdays,Even Weekdays, Weekends, Monthly. From 'Repeat Time' user can select the exact time at which the data shall be exported. From the 'Never Ends' option, user can opt for never ending export as per set schedule or can choose an end date for the data export from the 'Ends On' option.

5.5. Export Now Button

One can export all tables immediately as well by clicking on the 'Export Now' button. The Data Explorer asks for confirmation, showing all the important details such as tables, recipient's email address, location of export, size and status and exports the same within moments to the desired location.

Scheduled Export [\[1\]](#)

Data Explorer Request Detail

Save Cancel

Name

DER-000008

Owner

Status

Submitted

Selected Tables

Opportunity,Case

Dropbox

☐

Google Drive

☒

Dropbox Folder

Google Drive Folder

Export

Estimated Size

114 KB

Email Addresses

Google Drive Account

Dropbox Account

Created By

Last Modified By

7/17/2017 12:34 AM

Save Cancel

Scheduled Export

Scheduled Export Help [?](#)

Action	Active	Name	Repeats	Repeat time	Starts on	Ends on
Edit Del	☐	A-0000004	Daily	9:00	7/17/2017 12:34 AM	

6. Email Notification

Once the user exports desired number of tables, the Data Explorer pops an email notification confirming the export of the data.

