

QUICK START GUIDE

MARQUIS IQ + MFA SETUP

ACTIVATE

Tableau Account

SETUP

Multi-Factor Authentication (MFA)

SCHEDULE

Intro Session

Welcome to Marquis IQ

Getting you setup is as easy as 1-2-3.

ACTIVATE

your Marquis IQ license

1

CLICK Join Now

Marquis IQ uses Tableau Online as its dashboarding technology, you will need to Accept the Tableau invitation to join Marquis IQ.

2

ENTER USER INFORMATION

Enter your Name & Password. This will be the Password you'll use each time you sign in to Marquis IQ.

3

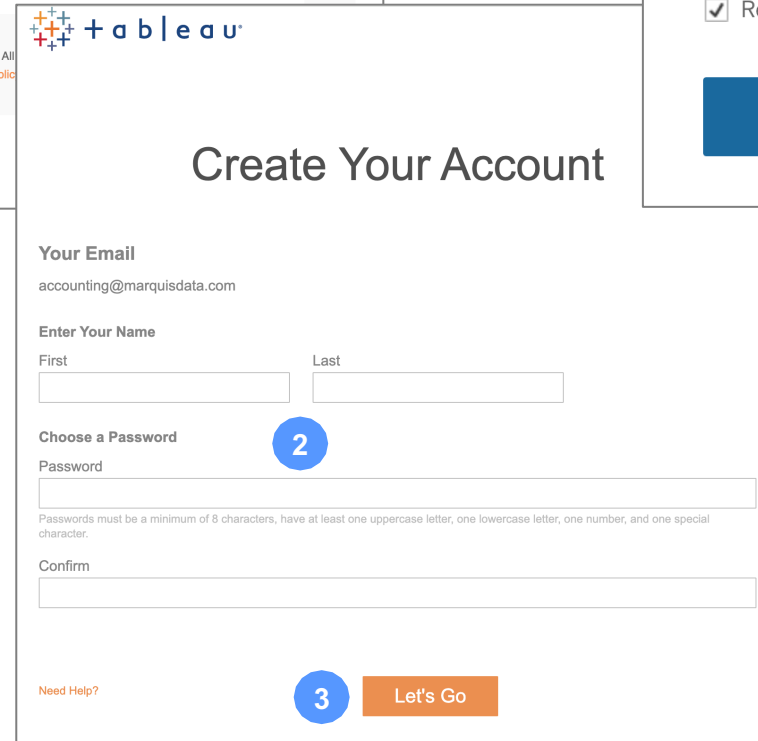
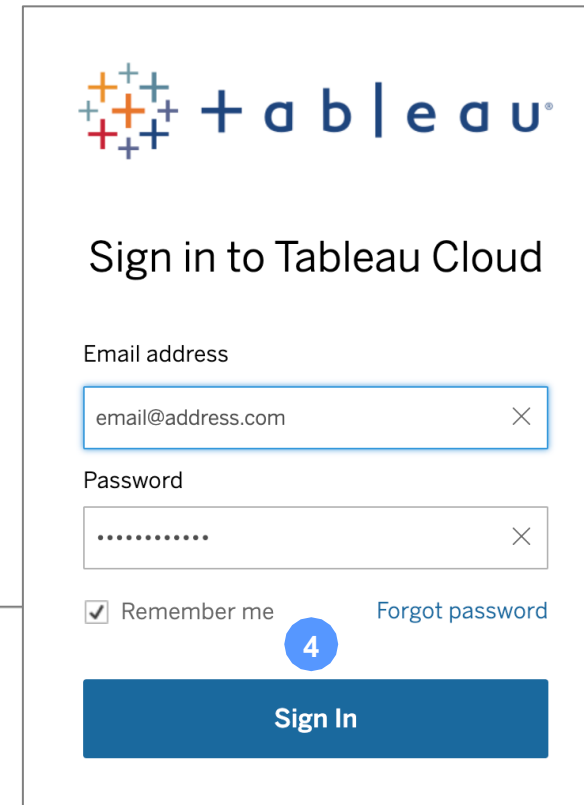
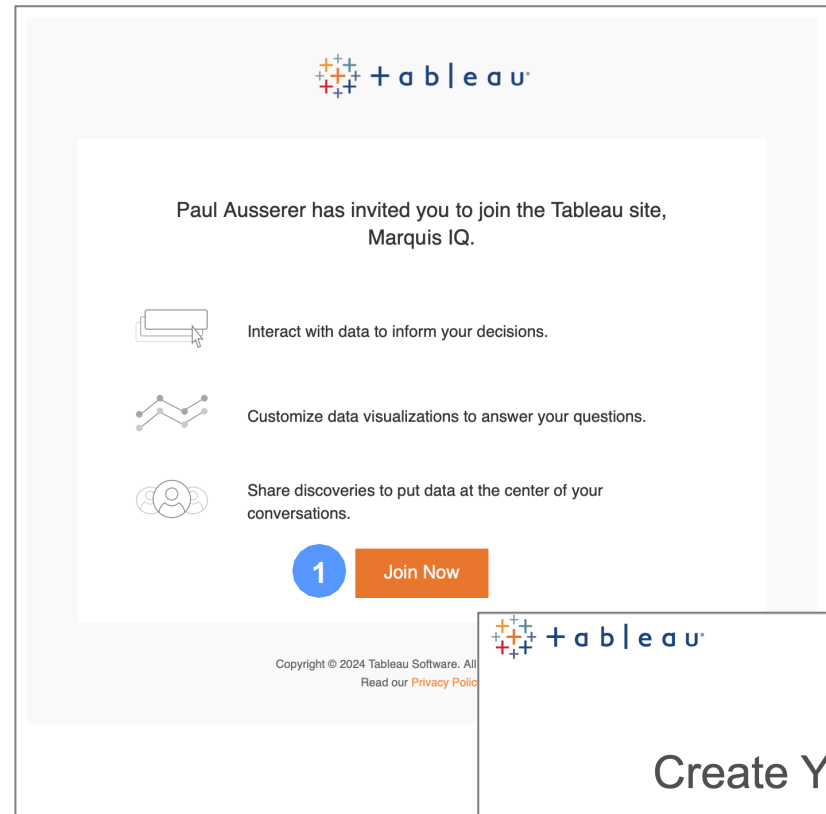
CLICK Let's Go

Click the Let's Go button to create your account.

4

CLICK Sign In

Enter your Email address and newly created Password to sign in.



SETUP

Multi-Factor Authentication (MFA)

5 CHOOSE MFA Method

You can choose which MFA provider you'd like. If your company has an existing MFA provider, you should probably use that option (One-Time Password Generator).

If not, we recommend that you use the Salesforce Authenticator method.

The screenshot shows the 'Register a Verification Method' dialog in Tableau. At the top is the Tableau logo. Below it is the title 'Register a Verification Method'. The main content area contains the instruction 'Select a verification method to register.' followed by four selectable options, each with an icon and a description:

- Salesforce Authenticator**: Connect your account to Salesforce Authenticator. (An orange arrow points to this option.)
- Security Key**: Connect a security key to your account.
- Built-In Authenticator**: Connect a built-in authenticator to your account.
- One-Time Password Generator**: Connect an authenticator app that generates verification codes. (An orange arrow points to this option.)

At the bottom of the dialog is a 'Cancel' button.

Marquis Recommended MFA Method
If your company does NOT mandate a specific MFA provider, then select this option to use the Salesforce Authenticator.

You only need to setup 1 Verification Method, NOT BOTH. Chose which is best for you.

Company MFA Method
If your company requires a specific MFA provider, select this option. For example, DUO, Microsoft Authenticator, OKTA.

SALESFORCE MFA

Setup Instructions

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DOWNLOAD App

Open your phone's App Store and search for **Salesforce Authenticator**. Download and install the application.

7

CLICK Add an Account

Click the Blue Button to create a new MFA Account.

8

COPY Two-Word Phrase

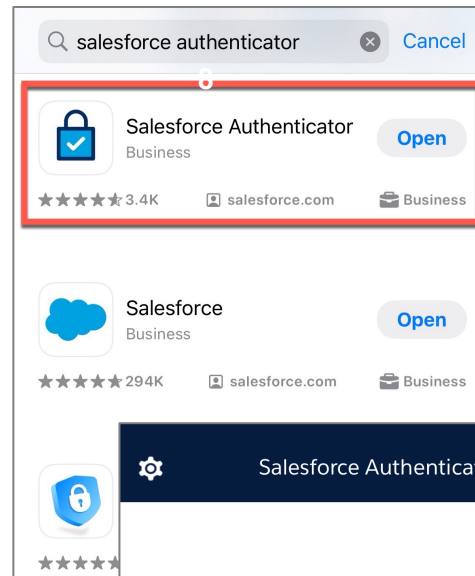
Use the Two-Word Phrase displayed here in your web browser

9

ENTER Two-Word Phrase

From your computer web browser, enter the Two-Word Phrase displayed on your phone.

PHONE



Your two-word phrase will be different than this screen capture.

8

historic drama

Copy to Clipboard

Enter this phrase on the app connection page in your account. Then confirm the connection on your phone.

WEB BROWSER



Connect Salesforce Authenticator

Use Salesforce Authenticator to verify your identity and sensitive transactions. Authenticator is a free app that runs on iOS or Android mobile devices.

1. Download Salesforce Authenticator from the [App Store](#) or [Google Play](#) and install it on your mobile device.
2. Open the app and tap Add an Account
3. The app shows you a unique two-word phrase. Enter the phrase.

Two-Word Phrase

historic drama

9

Cancel

Connect

MICROSOFT MFA

Setup Instructions

6

DOWNLOAD App

Open your phone's App Store and search for **Microsoft Authenticator**. Download and install the application.

7

CLICK [+] button

Click the + button to Add a new Account.

8

CLICK Work or school account

To support corporate Microsoft security, use the Work or school account option.

9

CLIK Scan QR Code

Use your phone's scanner to connect the MFA account. Scan the barcode displayed on the Web Browser when prompted.

10

REFRESH One-Time Password

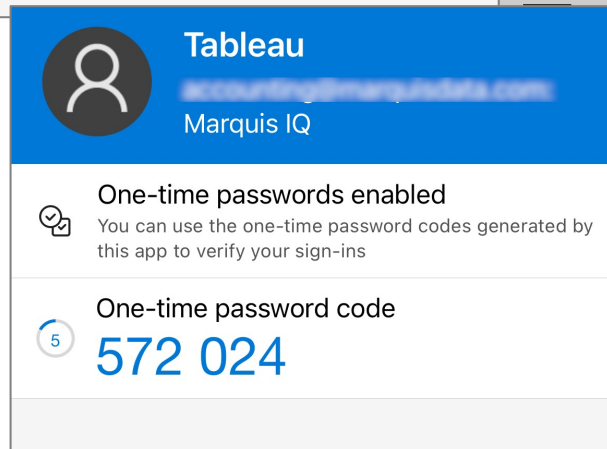
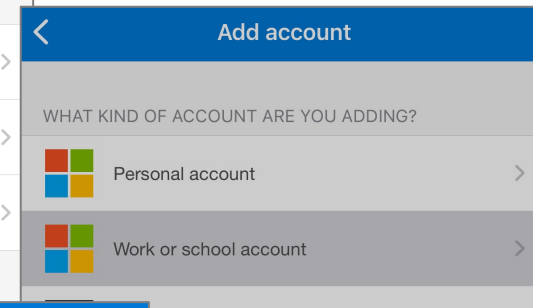
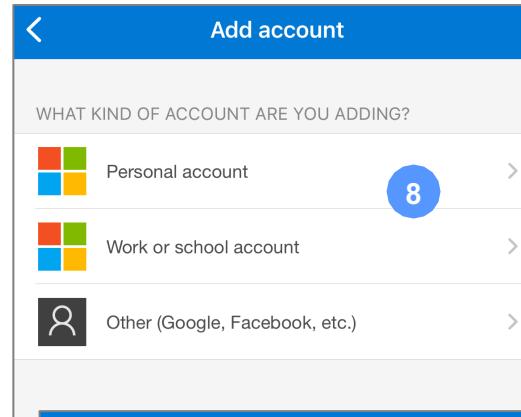
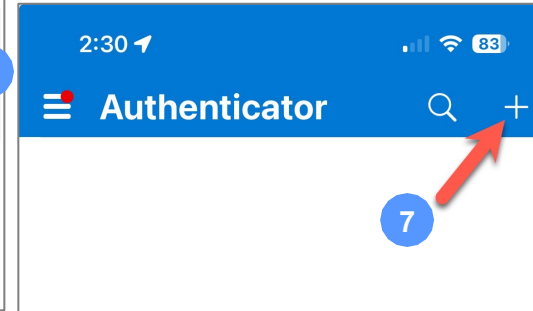
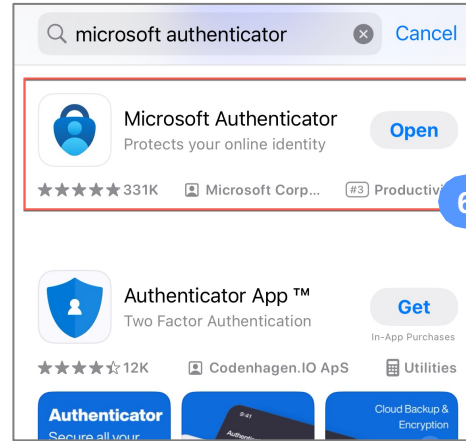
Every few seconds the One-Time password code will change as indicated by the timer to the left of the code.

11

ENTER One-time password

Enter the 6-digit number displayed on your phone into the Verification Code box within your browser.

PHONE



WEB BROWSER

Connect an Authenticator App

Connect an authenticator app that generates verification codes. You can use the codes when we need to verify your identity.

1. Download and install an authenticator app on your mobile device.
2. Use the app to scan this QR code.
3. Enter the code generated by the app.



Verification Code

Verifier Name

[I Can't Scan the QR Code](#)

11

SCHEDULE

Intro Session

SCHEDULE Time

You will receive an email inviting you to an introductory call where we'll talk through any connectivity issues you might be having, give you a quick tutorial of the Marquis IQ interface, and walk through the core reports & dashboards you have access to.

Click the link in the email to find an open time!

Invitation: Demo of Marquis IQ



✓ Paul Ausserer <Paul.Ausserer@marquisdata.com>

Today at 8:48 AM

To: ✓ Paul Ausserer

Hi Paul,
I'm happy to see that you joined the **Marquis IQ** platform!

To make the most of your experience, I recommend that we hold a quick introductory call. During this call, I'll guide you through the platform, introduce its features, and offer valuable tips to help you maximize the potential of your data.

Please book a convenient time for you here: <https://calendly.com/marquisdata-paul/marquisiq-demo>

A quick tour of **Marquis IQ** has consistently proven to be the most effective way to guarantee a fantastic user experience. Let's get started!

Best,
Paul Ausserer
Customer Success Manager

Let me know if you'd like to [opt out](#) of all future messages from Marquis Data.

WE'RE HERE TO HELP

OUR TEAM IS READY TO ANSWER YOUR QUESTIONS

CALL

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EMAIL

tableau.support@marquisdata.com

WEBSITE

www.marquisdata.com