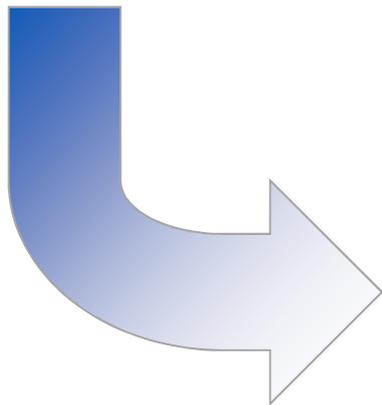


Faye Business Systems Group

FayeBSG - SugarCRM Dashboard Manager
v1.1



Information in this document is subject to change without notice.

Copyright © 2015, Faye Business Systems Group, Inc.
All rights reserved.

Trademarks

Dashboard Manager is a trademark of FayeBSG Inc.

Sugar is a trademark of SugarCRM, Inc.

All other company and product names may be trademarks of the respective companies with which they are associated.

This documentation and the software described herein, is prepared and published under license. SugarCRM, Inc. has not tested or verified either the software or any representation in this documentation regarding the software. SugarCRM, Inc. does not make any warranty with respect to either this documentation or the software described herein, and specifically disclaims any warranty, express or implied, with respect hereto, including the warranties of fitness for a particular purpose and merchantability.

Compatibilities

This software is currently compatible with:

Sugar v7.x – v7.6.1.0

Contact Us

Email: info@fayebsg.com
Web: www.fayebsg.com
Voice: 818-280-4820
Fax: 818-280-4821
Snail: 5950 Canoga Avenue, Suite 615
Woodland Hills, CA 91367

Table of Contents

Overview.....	4
Installation.....	5
Using the Dashboard Manager.....	14
Creating a New Dashboard.....	16
Copying an Existing Dashboard.....	19
Deploying Dashboards.....	19
Technical Notes.....	22

Overview

Sugar is the fastest growing CRM software package in the world. The FayeBSG Dashboard Manager is software that allows Sugar users to easily manage and deploy dashboards.

The **FayeBSG SugarCRM Dashboard Manager** gives users the ability to share their custom dashboards with other users. It also gives admin users the ability to create custom dashboards and deploy those dashboards to individual users, to a group of users in a team, or to group of users in a role.

Key Benefits

- Any user can copy their dashboard to the Dashboard Manager
- Create and/or edit Dashboards in the Dashboard Manager
- Deploy Dashboards to Users or groups of Users by Teams or Roles

Installation

Procedures – Installation

***Note: All examples and procedures shown were performed in Sugar v7.6*

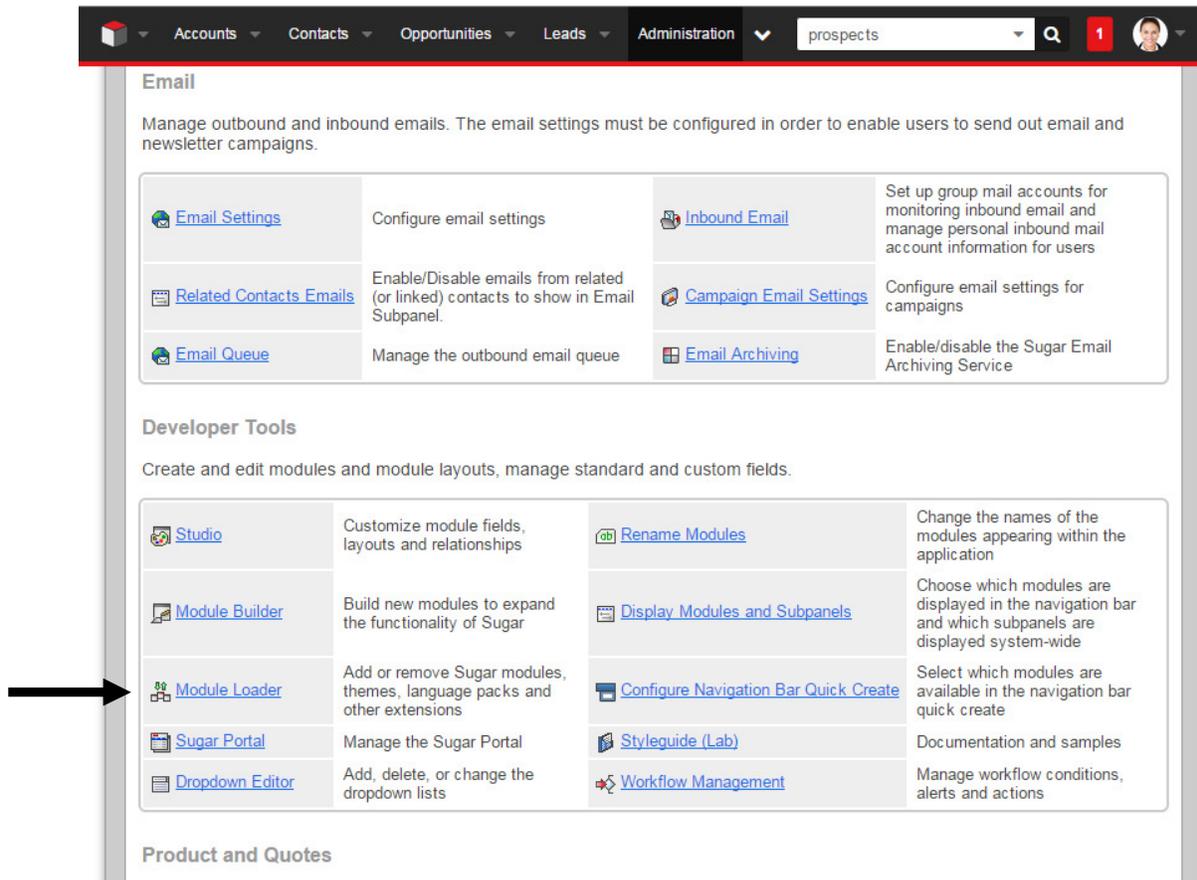
This application synchronizes data between Sugar and JIRA. The installation requires two steps:

- A. Installation of the FayeBSG SugarCRM Dashboard Manager module within Sugar**
- B. Configuration of module**

You will need the following file from FBSG to complete the installation:

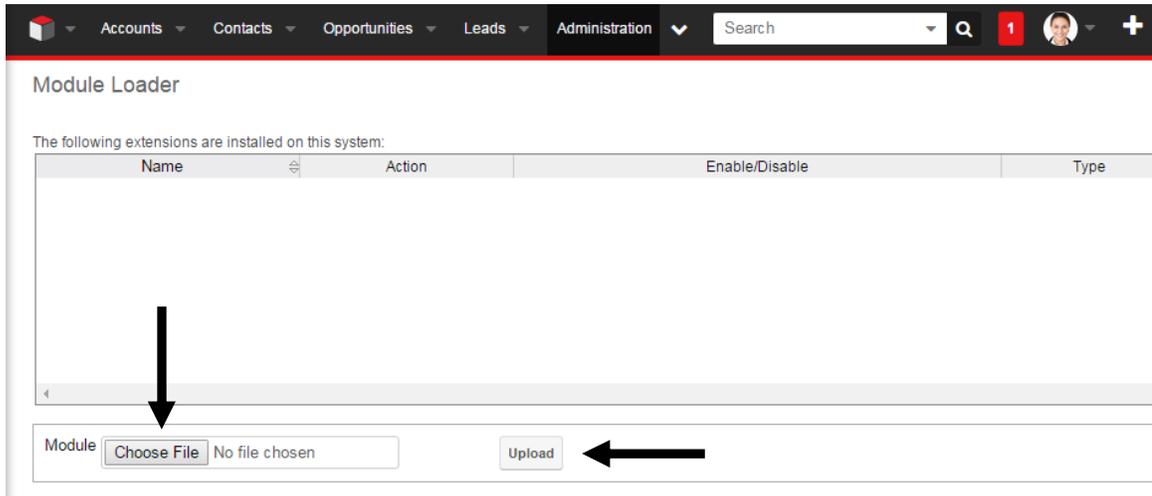
FBSGSugar-FBSG_Dashboard_Manager<version>.zip

1. Log in to your Sugar instance using an account with Administrative privileges.
2. Go to the Administration page within Sugar (Click “Admin” in the upper right corner).
3. Click “Module Loader”

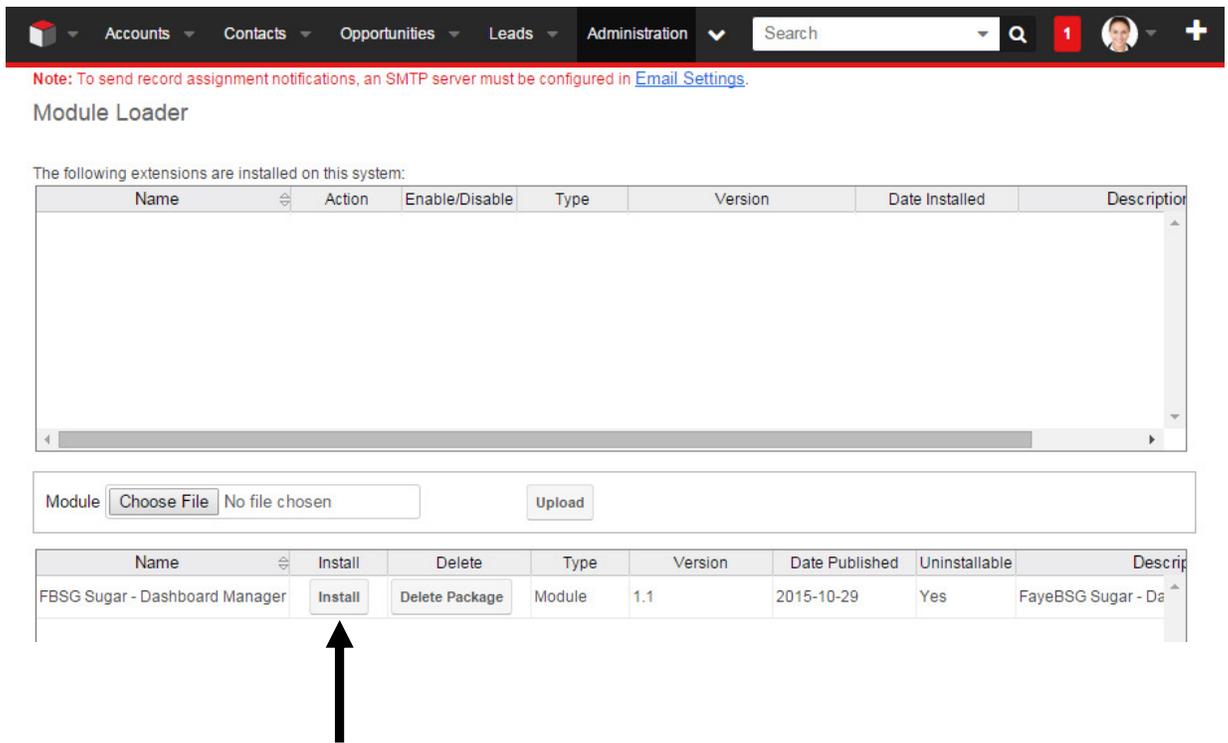


Procedures – Installation

- Click “Choose File” and locate the *FBSGSugar-FBSG_Dashboard_Manager<version>.zip* file. Press “Open” and then click the “Upload” button.

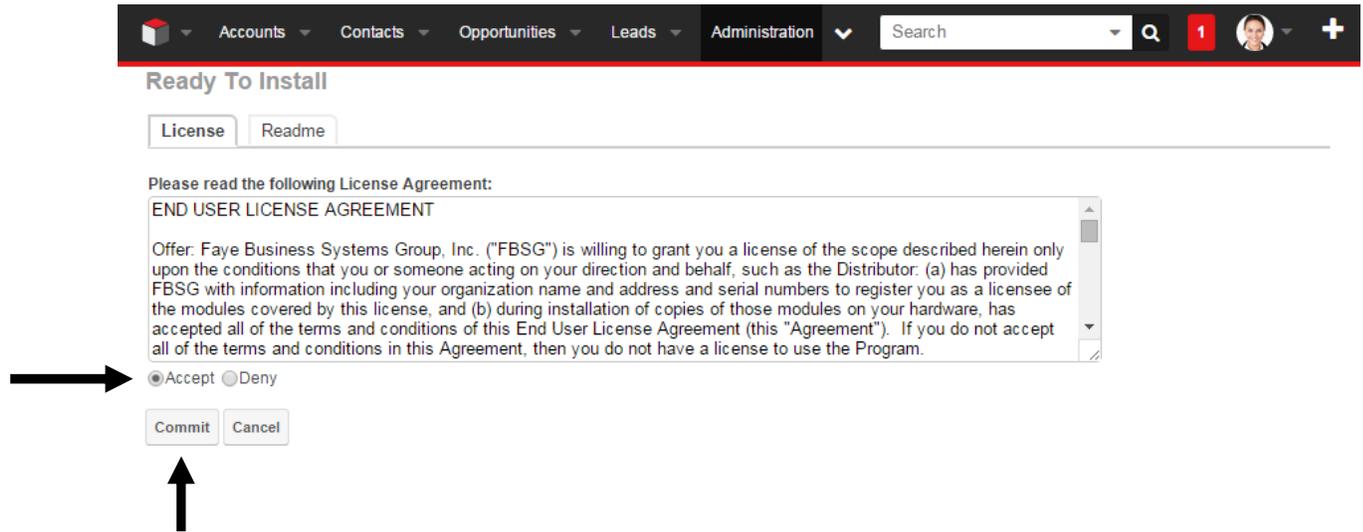


- Click “Install” on the “FBSG Sugar – Dashboard Manager” to proceed.



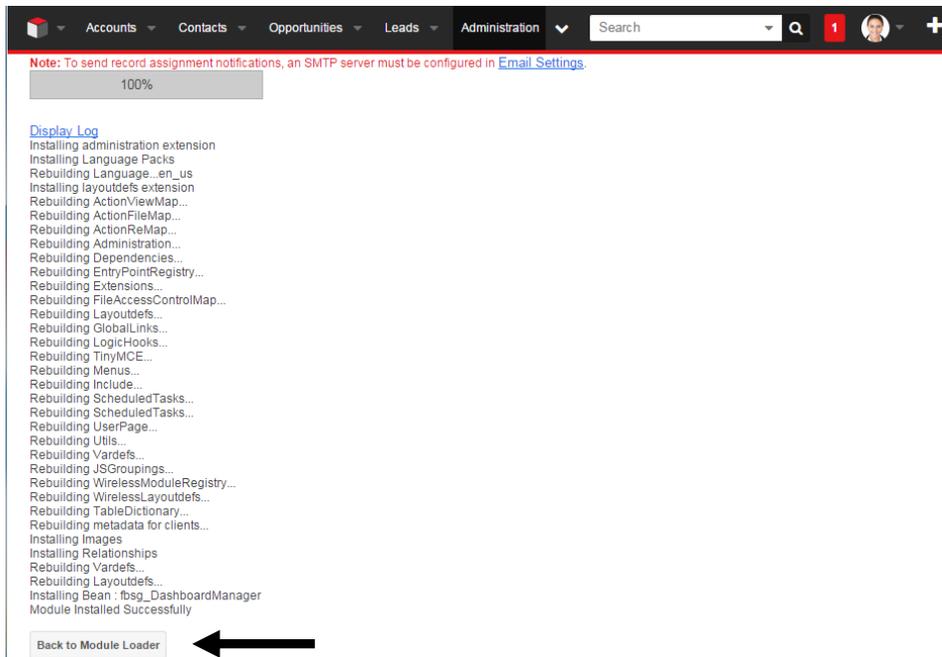
Procedures – Installation (continued)

- Click the “Accept” radio button to accept the license agreement, and click “Commit” to begin the installation.



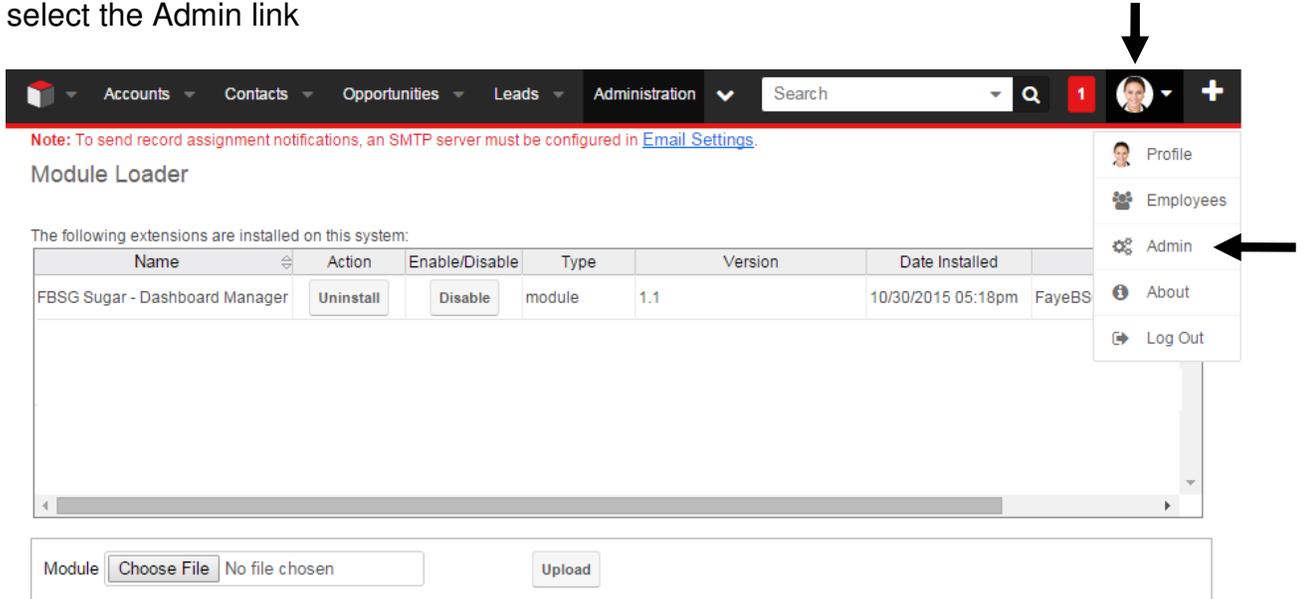
****Note:** This process may take a few minutes to complete

- The module will load the main components of the FayeBSG Dashboard Manager
- Then click “Back to Module Loader” to return to the Module Loader page

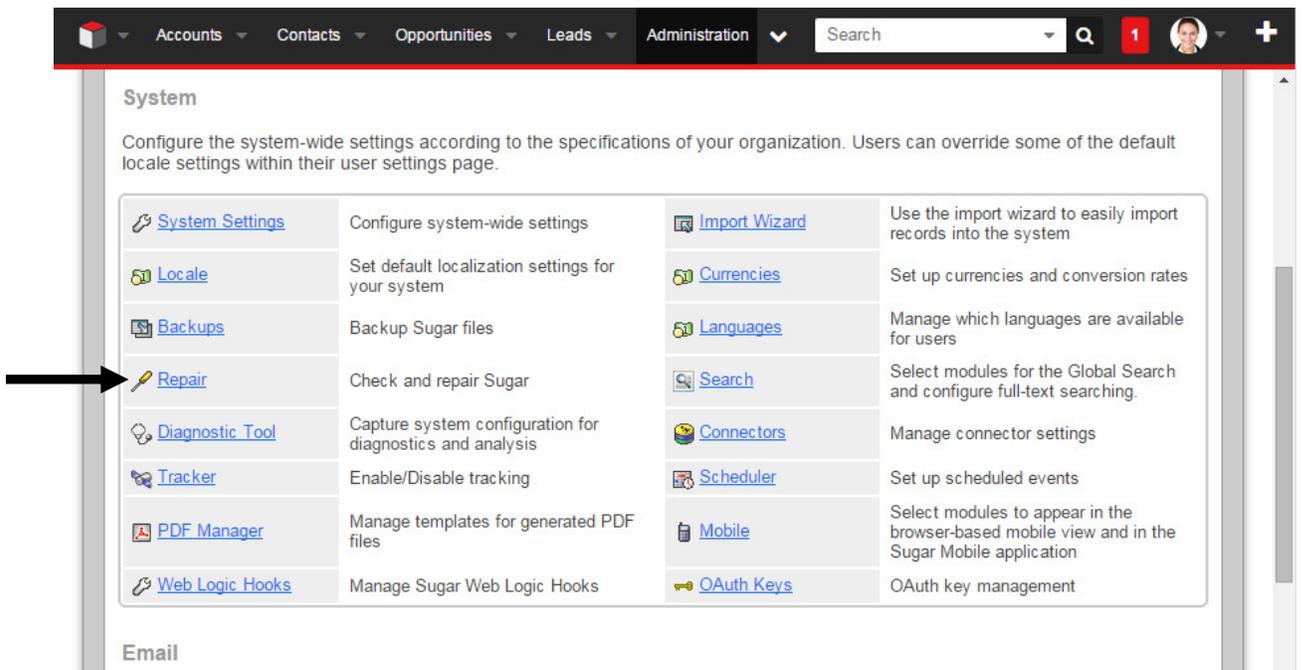


Procedures – Installation (continued)

- From the Module Loader page click on the Admin Icon in the upper right corner and select the Admin link

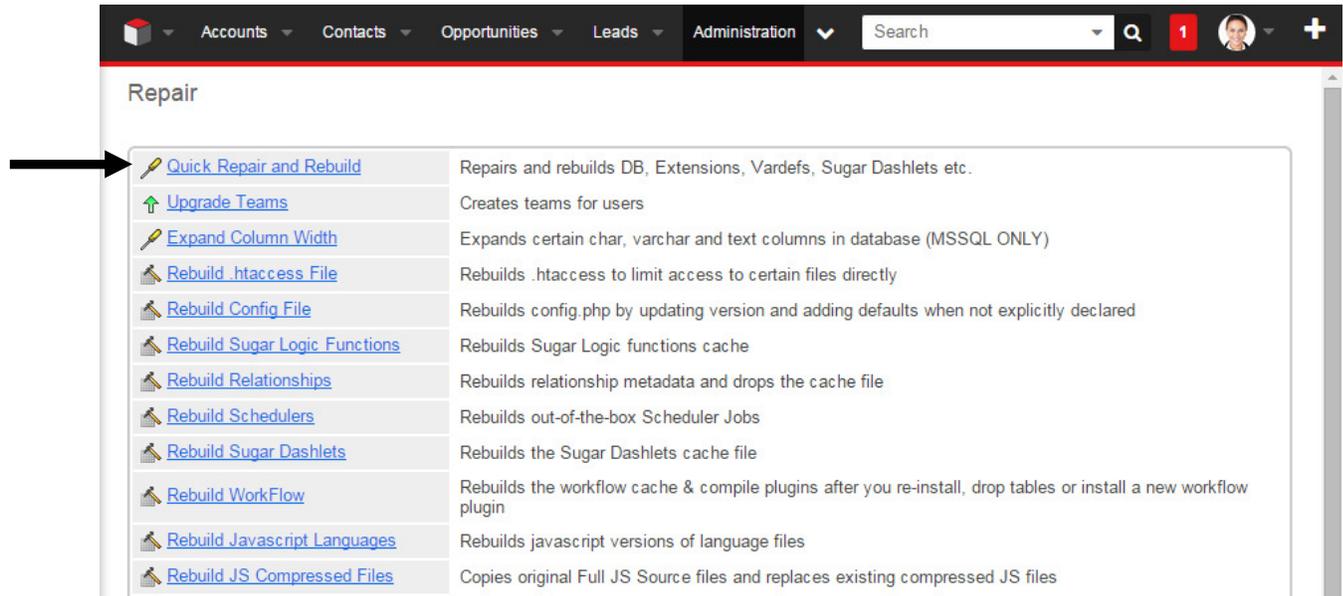


- Under the System tools locate and click “Repair”



Procedures – Installation (continued)

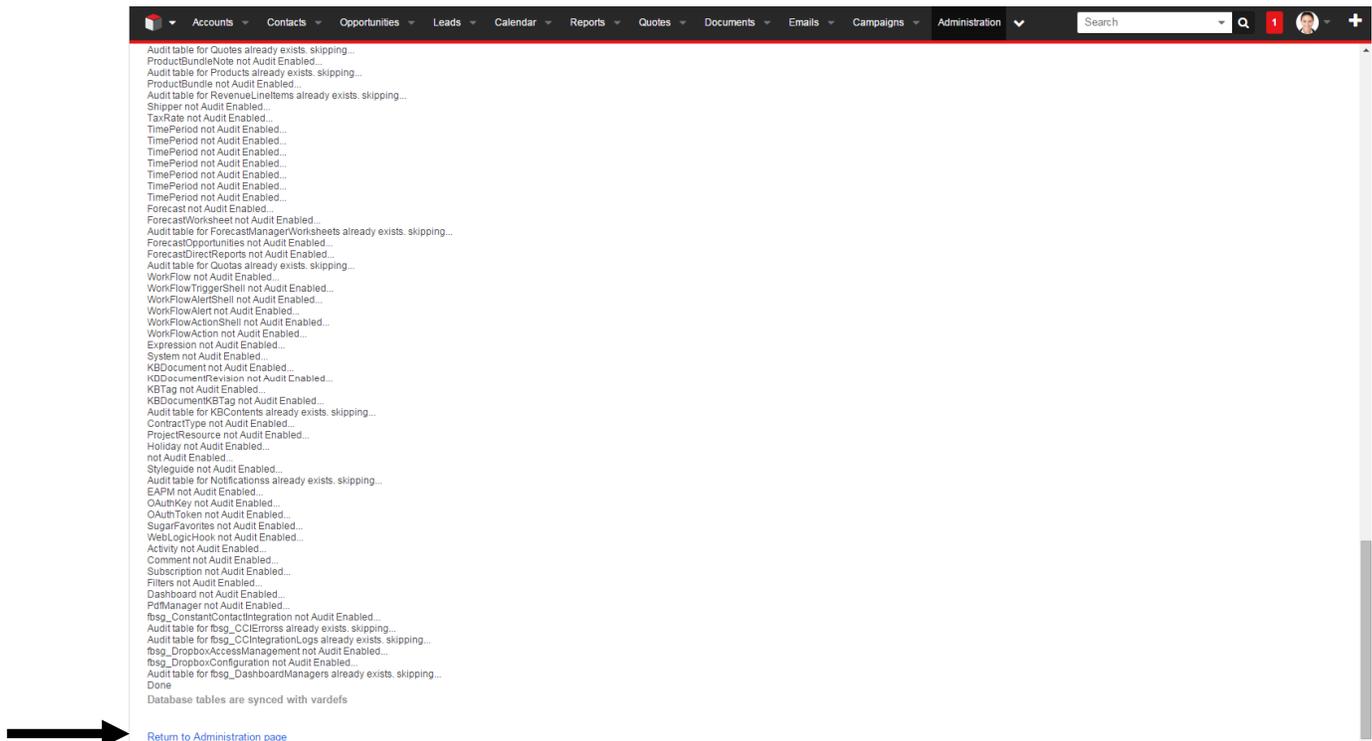
11. Then select *“Quick Repair and Rebuild”*



The screenshot shows the SugarCRM Administration interface. The 'Administration' menu is open, and the 'Repair' section is visible. A list of repair options is displayed, with 'Quick Repair and Rebuild' highlighted by a black arrow. The options include:

- [Quick Repair and Rebuild](#): Repairs and rebuilds DB, Extensions, Vardefs, Sugar Dashlets etc.
- [Upgrade Teams](#): Creates teams for users
- [Expand Column Width](#): Expands certain char, varchar and text columns in database (MSSQL ONLY)
- [Rebuild .htaccess File](#): Rebuilds .htaccess to limit access to certain files directly
- [Rebuild Config File](#): Rebuilds config.php by updating version and adding defaults when not explicitly declared
- [Rebuild Sugar Logic Functions](#): Rebuilds Sugar Logic functions cache
- [Rebuild Relationships](#): Rebuilds relationship metadata and drops the cache file
- [Rebuild Schedulers](#): Rebuilds out-of-the-box Scheduler Jobs
- [Rebuild Sugar Dashlets](#): Rebuilds the Sugar Dashlets cache file
- [Rebuild WorkFlow](#): Rebuilds the workflow cache & compile plugins after you re-install, drop tables or install a new workflow plugin
- [Rebuild Javascript Languages](#): Rebuilds javascript versions of language files
- [Rebuild JS Compressed Files](#): Copies original Full JS Source files and replaces existing compressed JS files

12. After the Repair and Rebuild is complete scroll to the bottom of the page and click on the *“Return to Administration Page”* link



The screenshot shows the SugarCRM Administration interface after the repair process is complete. The page displays a list of audit messages, including:

- Audit table for Quotes already exists, skipping...
- ProductBundleNote not Audit Enabled...
- Audit table for Products already exists, skipping...
- ProductBundle not Audit Enabled...
- Audit table for RevenueLineItems already exists, skipping...
- Shipper not Audit Enabled...
- TaxRate not Audit Enabled...
- TimePeriod not Audit Enabled...
- Forecast not Audit Enabled...
- ForecastWorksheet not Audit Enabled...
- Audit table for ForecastManagerWorksheets already exists, skipping...
- ForecastOpportunities not Audit Enabled...
- ForecastDirectReports not Audit Enabled...
- Audit table for Quotas already exists, skipping...
- WorkFlow not Audit Enabled...
- WorkFlowTriggerShell not Audit Enabled...
- WorkFlowAlertShell not Audit Enabled...
- WorkFlowAlert not Audit Enabled...
- WorkFlowActionShell not Audit Enabled...
- WorkFlowAction not Audit Enabled...
- Expression not Audit Enabled...
- System not Audit Enabled...
- KBDocument not Audit Enabled...
- KBDocumentRevision not Audit Enabled...
- KBTag not Audit Enabled...
- KBDocumentKBTag not Audit Enabled...
- Audit table for KBContents already exists, skipping...
- ContractType not Audit Enabled...
- ProjectResource not Audit Enabled...
- Holiday not Audit Enabled...
- not Audit Enabled...
- Styleguide not Audit Enabled...
- Audit table for Notificationss already exists, skipping...
- EAPM not Audit Enabled...
- OAuthToken not Audit Enabled...
- SugarFavorites not Audit Enabled...
- WebLogicHook not Audit Enabled...
- Activity not Audit Enabled...
- Comment not Audit Enabled...
- Subscription not Audit Enabled...
- Filters not Audit Enabled...
- Dashboard not Audit Enabled...
- PdfManager not Audit Enabled...
- fbsg_ConstantContactIntegration not Audit Enabled...
- Audit table for fbsg_CCIErrors already exists, skipping...
- Audit table for fbsg_CCIntegrationLogs already exists, skipping...
- fbsg_DropboxAccessManagement not Audit Enabled...
- fbsg_DropboxConfiguration not Audit Enabled...
- Audit table for fbsg_DashboardManagers already exists, skipping...
- Done
- Database tables are synced with vardefs

A black arrow points to the [Return to Administration page](#) link at the bottom of the page.

Procedures – Installation (continued)

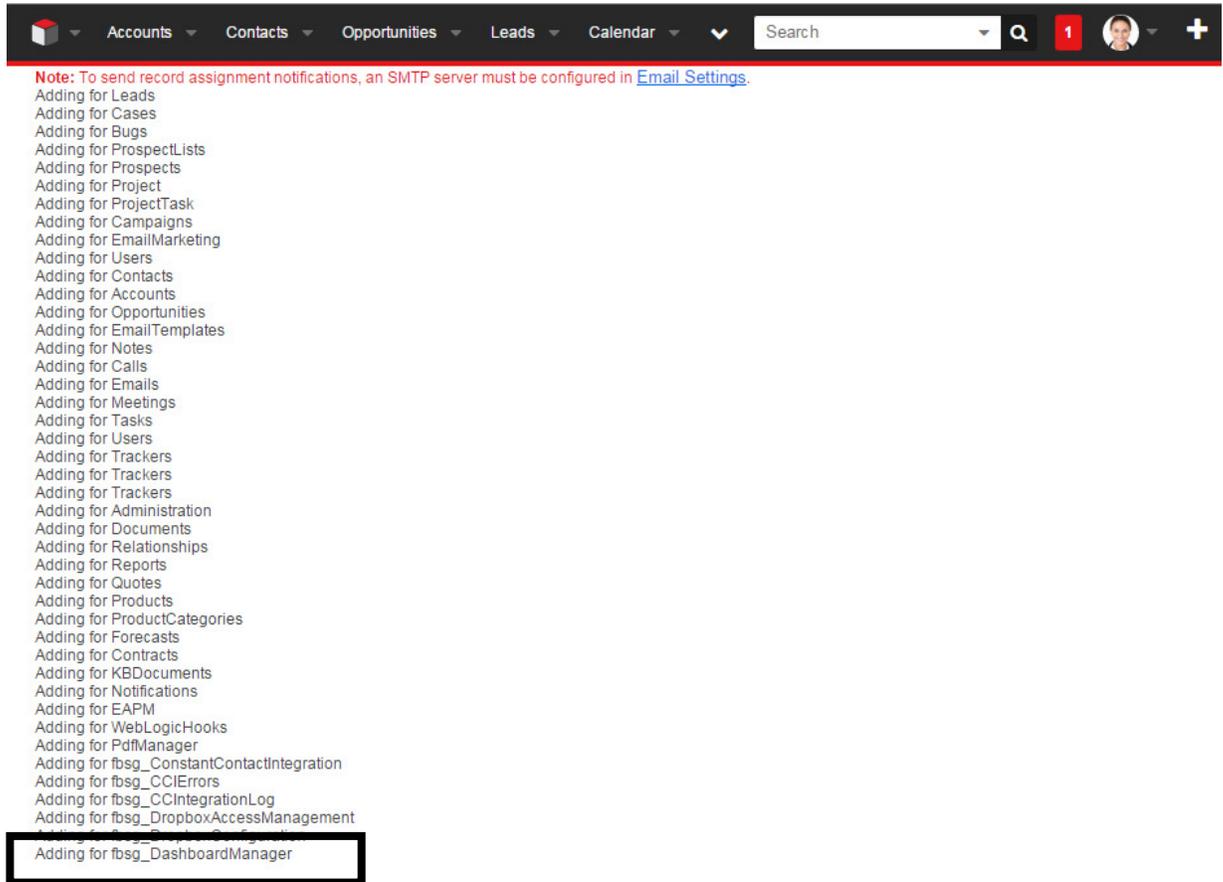
13. After clicking on the Return to Administration Page link go again to the System tools locate and select “Repair” and then locate and click on “Repair Roles”

The screenshot shows the SugarCRM Administration interface. The top navigation bar includes 'Accounts', 'Contacts', 'Opportunities', 'Leads', and 'Administration'. A search bar and a notification icon are also present. The main content area is titled 'Repair' and contains a list of repair tasks. A black arrow points to the 'Repair Roles' option in the list.

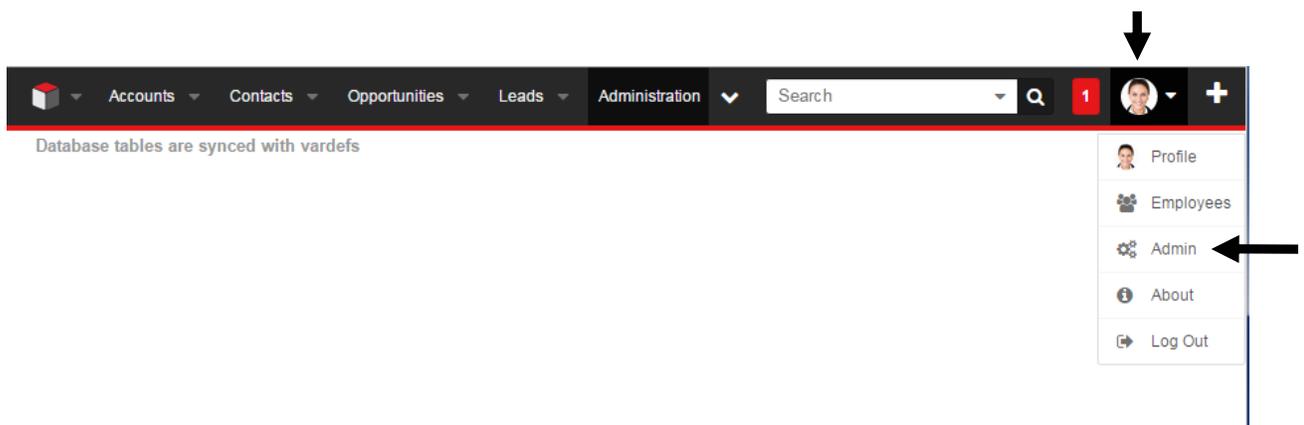
Tool Name	Description
Quick Repair and Rebuild	Repairs and rebuilds DB, Extensions, Vardefs, Sugar Dashlets etc.
Upgrade Teams	Creates teams for users
Expand Column Width	Expands certain char, varchar and text columns in database (MSSQL ONLY)
Rebuild .htaccess File	Rebuilds .htaccess to limit access to certain files directly
Rebuild Config File	Rebuilds config.php by updating version and adding defaults when not explicitly declared
Rebuild Sugar Logic Functions	Rebuilds Sugar Logic functions cache
Rebuild Relationships	Rebuilds relationship metadata and drops the cache file
Rebuild Schedulers	Rebuilds out-of-the-box Scheduler Jobs
Rebuild Sugar Dashlets	Rebuilds the Sugar Dashlets cache file
Rebuild WorkFlow	Rebuilds the workflow cache & compile plugins after you re-install, drop tables or install a new workflow plugin
Rebuild Javascript Languages	Rebuilds javascript versions of language files
Rebuild JS Compressed Files	Copies original Full JS Source files and replaces existing compressed JS files
Rebuild Sidecar Files	Copies original Sidecar Full JS Source files and replaces existing compressed JS files
Rebuild JS Grouping Files	Re-concatenates and overwrites existing group files with latest versions of group files
Rebuild Minified JS Files	Copies original Full JS Source Files and minifies them, then replaces existing compressed files
Repair JS Files	Compresses Existing JS files - includes any changes made, but does not overwrite original JS Source files
Repair Non-Lowercase Fields	Repair mixed-case custom table(s) and metadata file(s) to fix issues where code expects lowercase field names
Repair Teams	Rebuilds private team memberships based on user reporting hierarchy
Repair Roles	Repairs Roles by adding all new modules that support Access Controls, and by adding any new Access Controls to existing modules
Repair Oracle VARCHAR2 Columns	Changes the semantics of VARCHAR2 columns from byte to char, necessary for UTF-8, MBCS support
Rebuild fulltext indices	Triggers a rebuild of fulltext indices. Oracle 9i owners should run this frequently.
Repair Inbound Email Accounts	Repairs Inbound Email accounts and encrypts account passwords

Procedures – Installation (continued)

14. Repair Roles does not provide a progress bar of any kind, but it is safe to assume that when the modules most recently installed appear on the screen at the bottom of the list that the Repair Roles has completed.



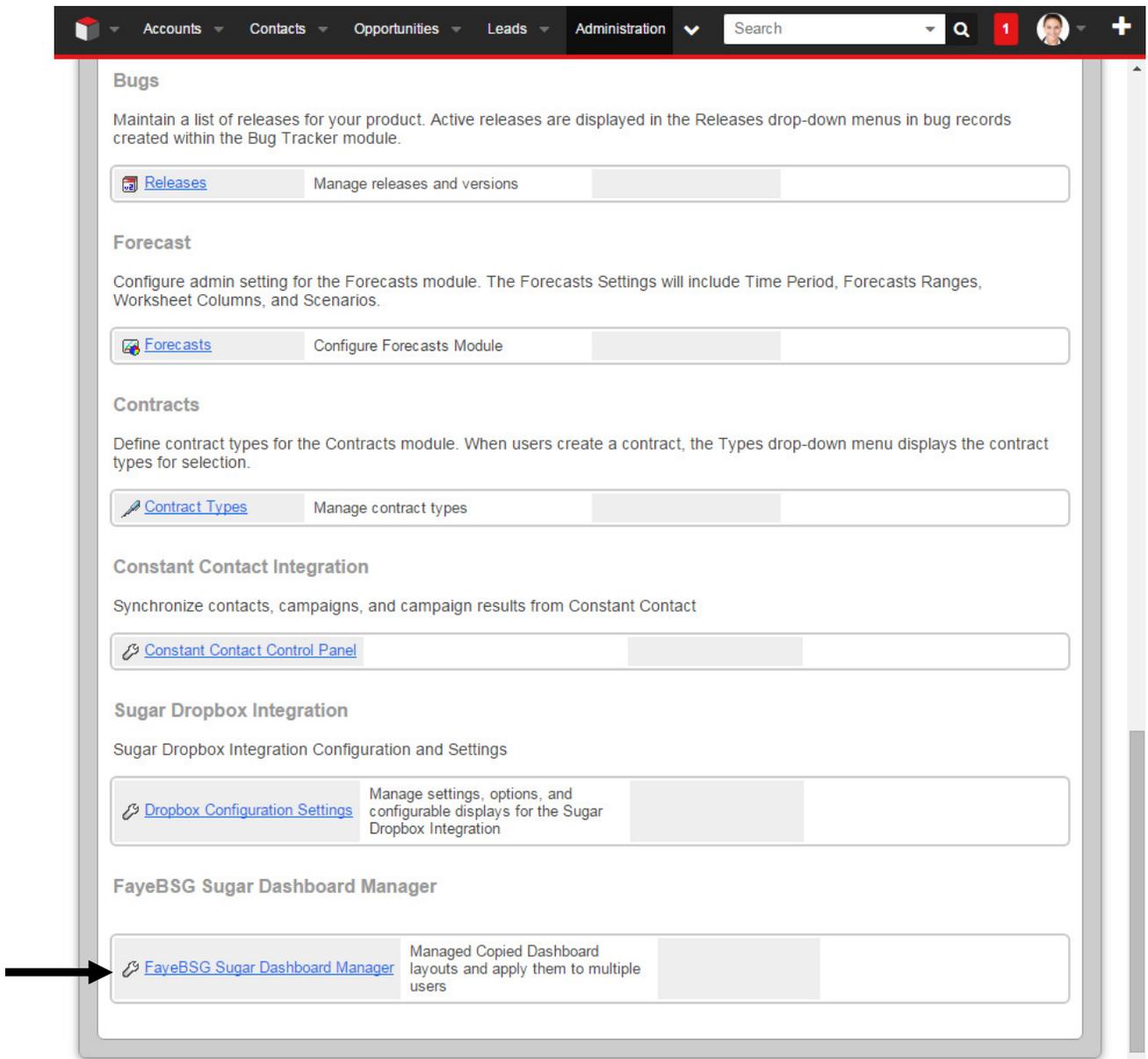
15. After Repair Roles has finished click on the Admin icon and select the Admin link



Procedures – Installation (continued)

16. Once in the Admin page scroll to the bottom where you will see the “FayeBSG Sugar Dashboard Manager”

*** Note: You may have to log out and log back in after you “execute” in order for the “Constant Contact Control Panel” to appear in the Admin screen (see below screen shot).*

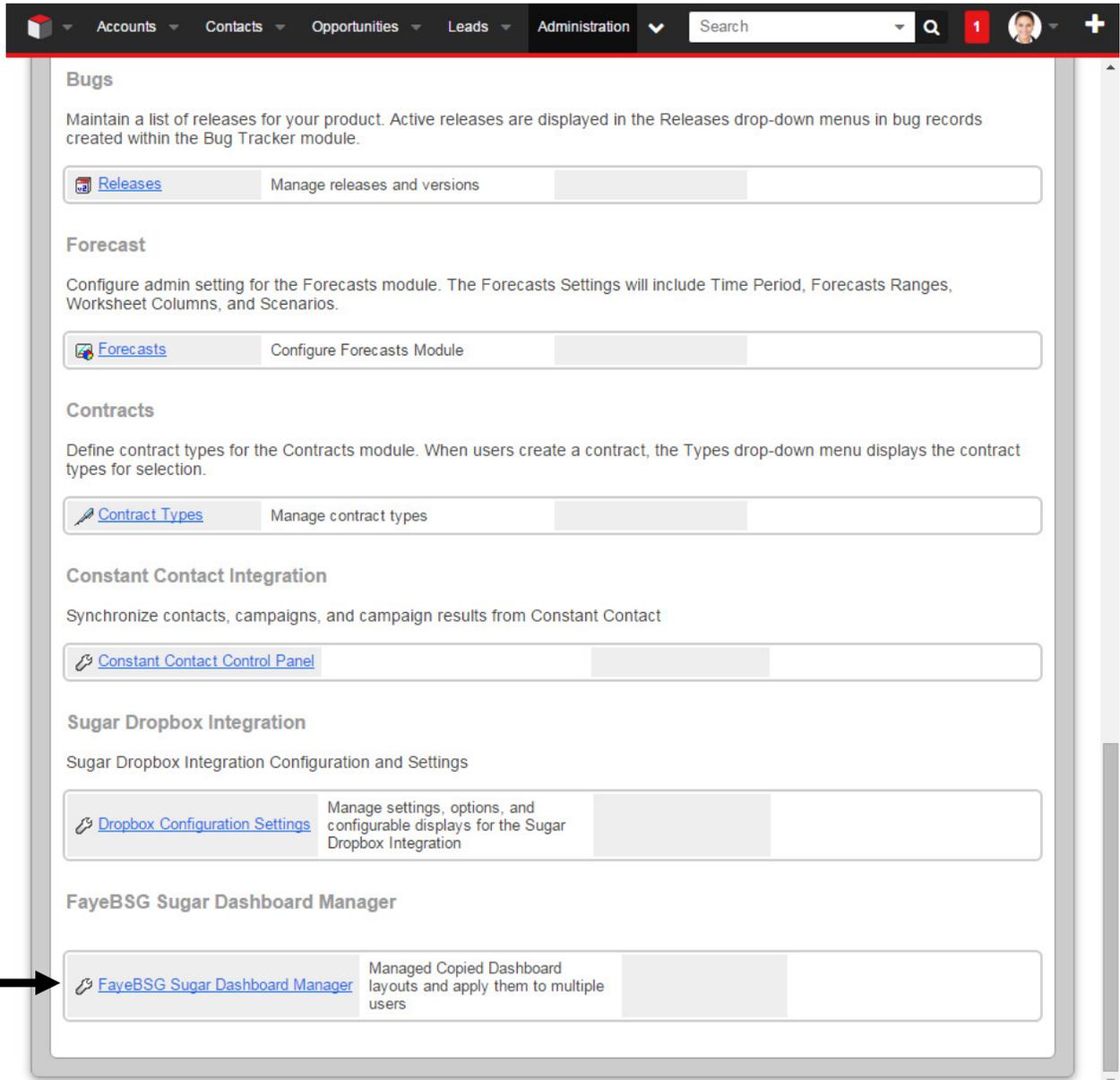


Using the Dashboard Manager

Using the Dashboard Manager

****Note:** You may have to log out and log back in after you “execute” in order for the “Constant Contact control panel” to appear in the admin screen (see below screen shot).

1. Navigate to the “Admin” screen, scroll to the bottom, and click on the “FayeBSG Sugar Dashboard Manager” link

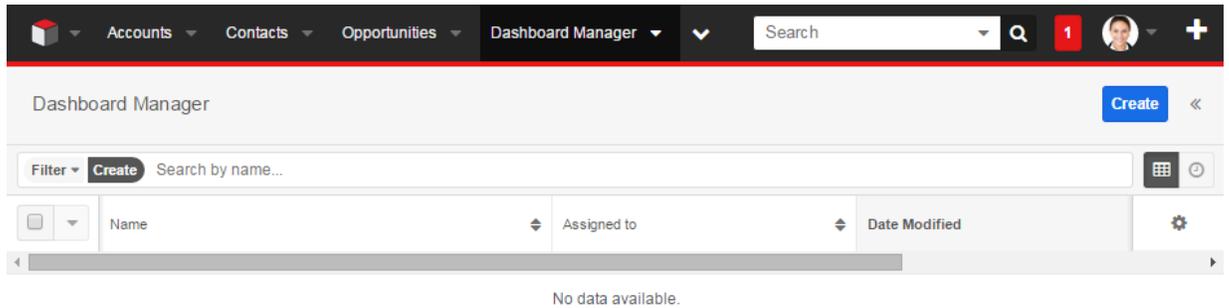


The screenshot shows the SugarCRM Administration interface. The top navigation bar includes tabs for Accounts, Contacts, Opportunities, Leads, and Administration. A search bar and a notification bell are also present. The main content area is divided into several sections:

- Bugs:** Maintain a list of releases for your product. Active releases are displayed in the Releases drop-down menus in bug records created within the Bug Tracker module. A link for [Releases](#) is provided to manage releases and versions.
- Forecast:** Configure admin setting for the Forecasts module. The Forecasts Settings will include Time Period, Forecasts Ranges, Worksheet Columns, and Scenarios. A link for [Forecasts](#) is provided to configure the Forecasts Module.
- Contracts:** Define contract types for the Contracts module. When users create a contract, the Types drop-down menu displays the contract types for selection. A link for [Contract Types](#) is provided to manage contract types.
- Constant Contact Integration:** Synchronize contacts, campaigns, and campaign results from Constant Contact. A link for [Constant Contact Control Panel](#) is provided.
- Sugar Dropbox Integration:** Sugar Dropbox Integration Configuration and Settings. A link for [Dropbox Configuration Settings](#) is provided to manage settings, options, and configurable displays for the Sugar Dropbox Integration.
- FayeBSG Sugar Dashboard Manager:** Managed Copied Dashboard layouts and apply them to multiple users. A link for [FayeBSG Sugar Dashboard Manager](#) is provided, and a black arrow points to this link.

Using the Dashboard Manager (continued)

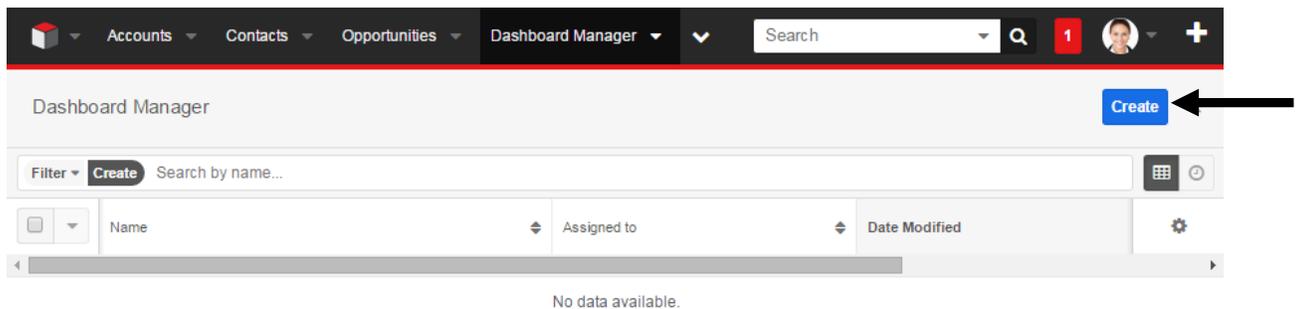
2. When you first log in to the Dashboard Manager there will be no data available



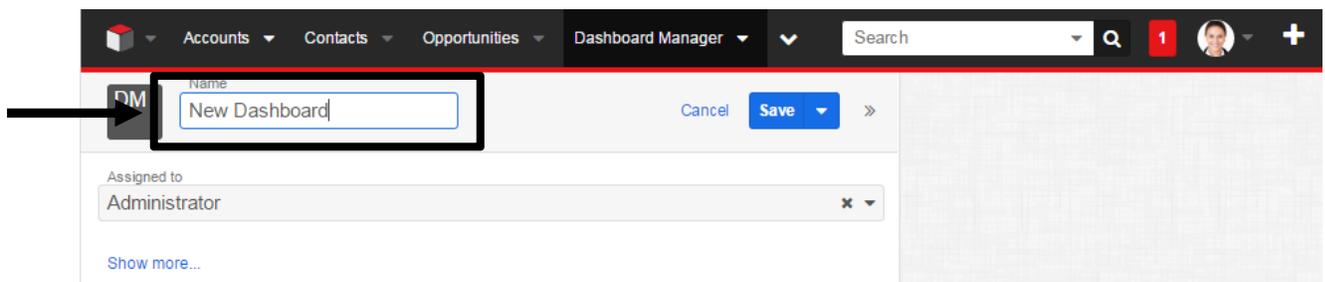
3. There are two ways to add a Sugar Dashboard to the Dashboard Manager.
- Create a new Dashboard within the Dashboard Manager
 - Copy an existing Dashboard from the Home page to the Dashboard Manager, please refer to [page 19](#) for this option

Creating a New Dashboard

4. To create a new Dashboard within the Dashboard Manager click on the “Create” button

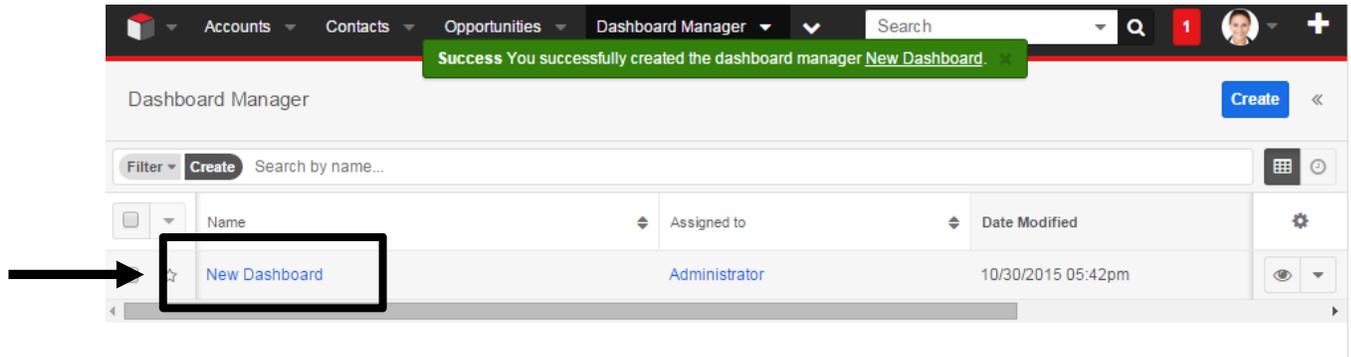


5. A drawer will appear where you can enter a name for the new Dashboard

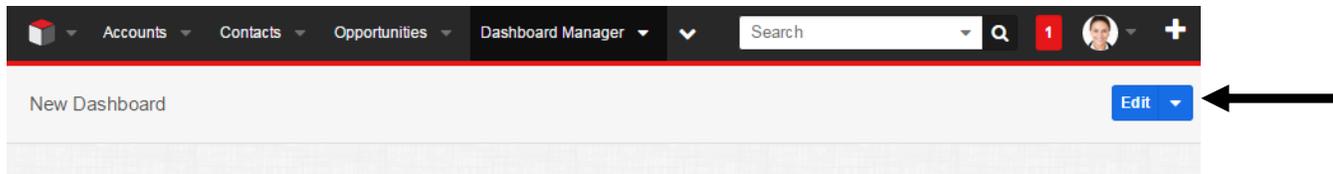


Using the Dashboard Manager – Creating a New Dashboard

6. This will create a new blank Dashboard. Click on the name of the Dashboard to edit it.

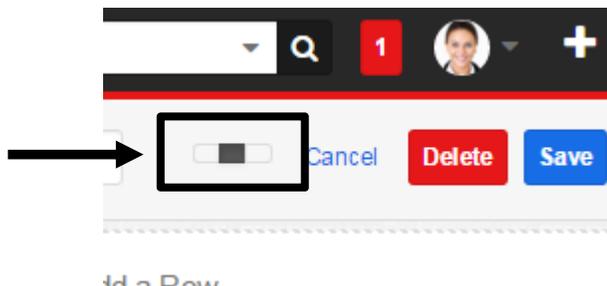


7. From within the edit view click on the "Edit" button to begin editing the Dashboard



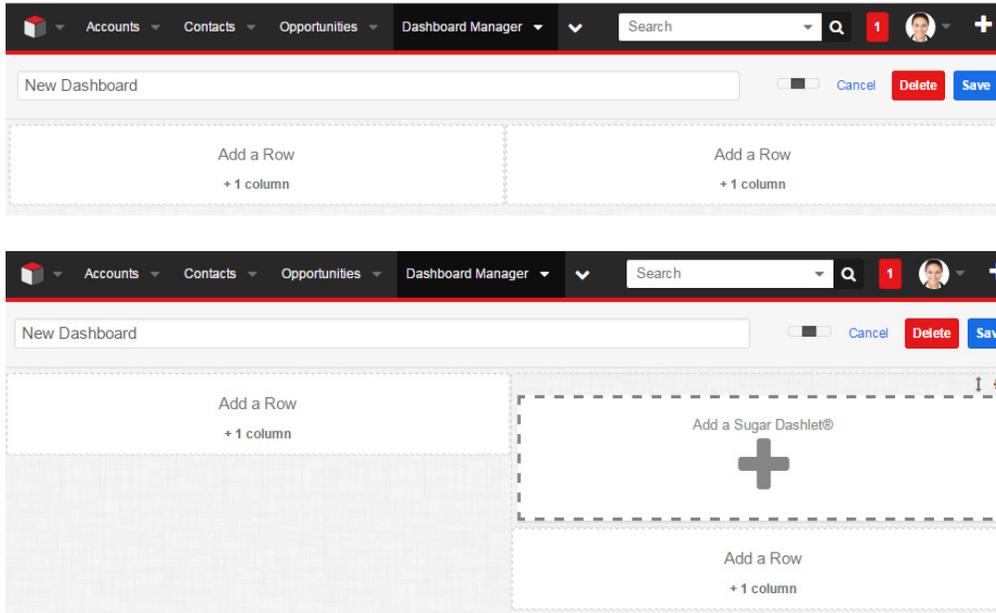
8. From the edit view you can choose between a 1, 2, or 3 column Dashboard layout by using the column toggle highlighted below

***Note: The default setting is a two column layout*

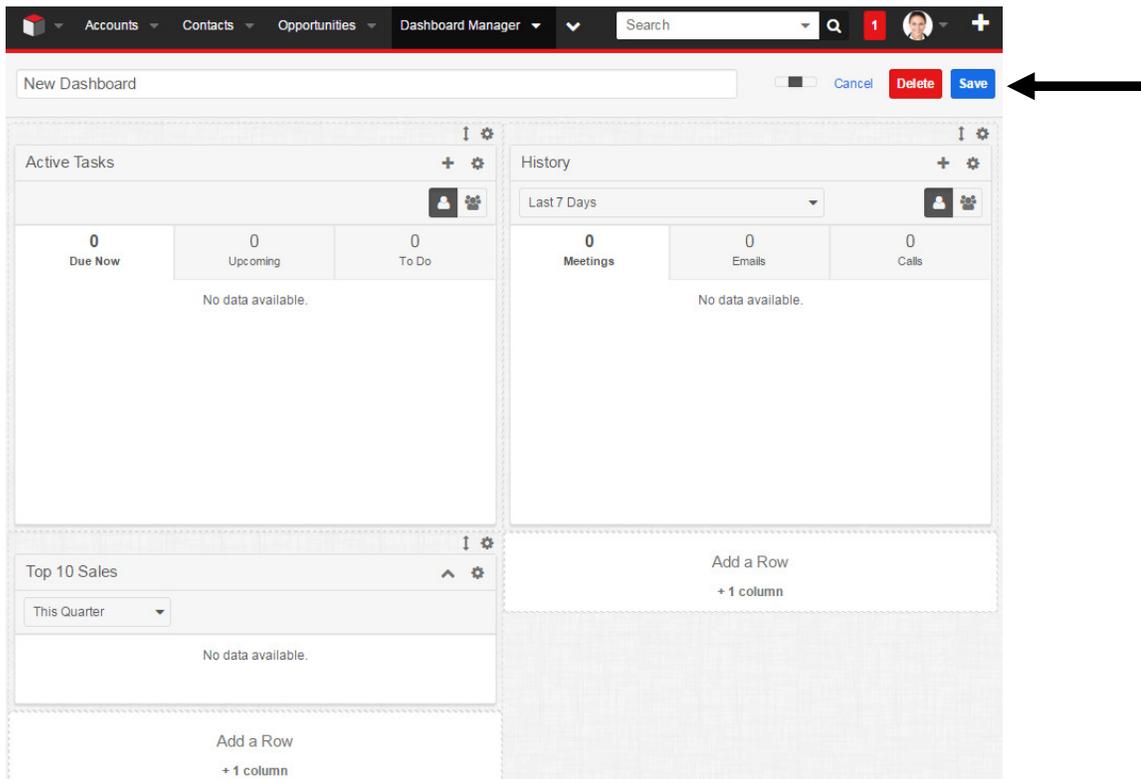


Using the Dashboard Manager – Creating a New Dashboard (continued)

9. After selecting you can begin to add rows and dashlets.



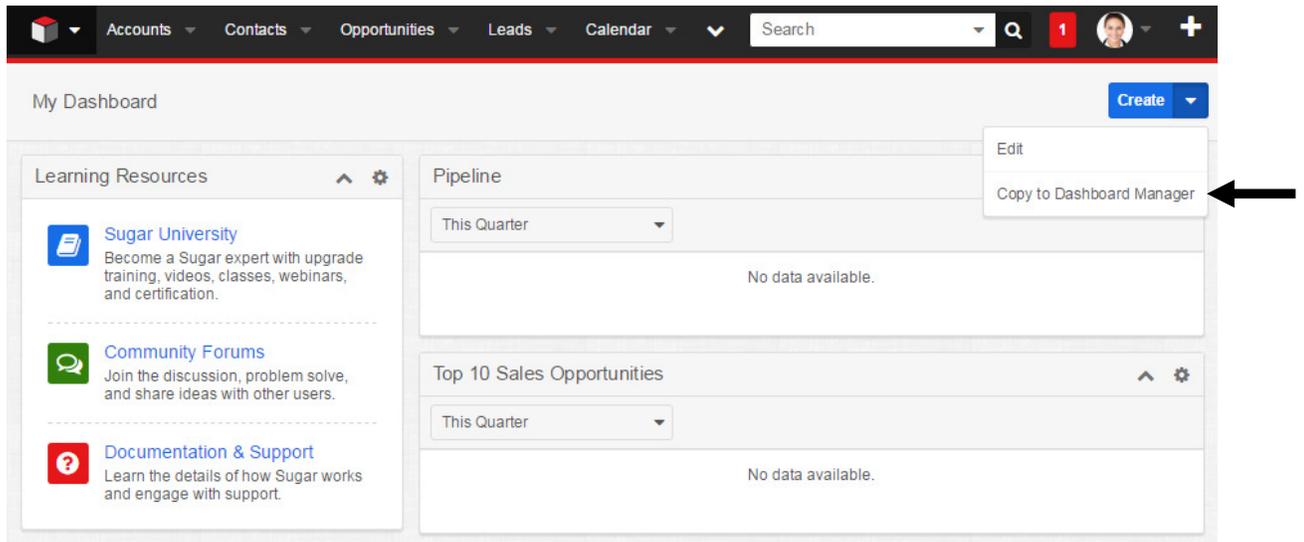
10. When you are finished designing the layout click on the “Save” button



Using the Dashboard Manager (continued)

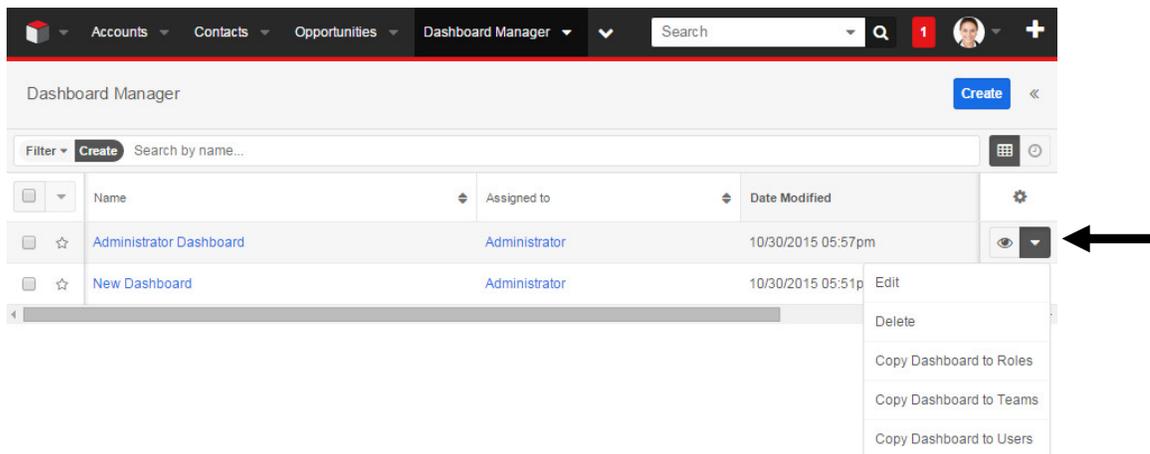
Copying an Existing Dashboard

11. To copy an existing Dashboard go the Home page and display the desired Dashboard
12. From the Home page click on the Action Menu of the “Create” button and select “Copy to Dashboard Manager”



Deploying Dashboards

13. There are two methods of deploying Dashboards, from the list view or the record view
14. To deploy Dashboards from the list view click on the Action menu dropdown of the Dashboard you want to deploy from the Dashboard Manager page

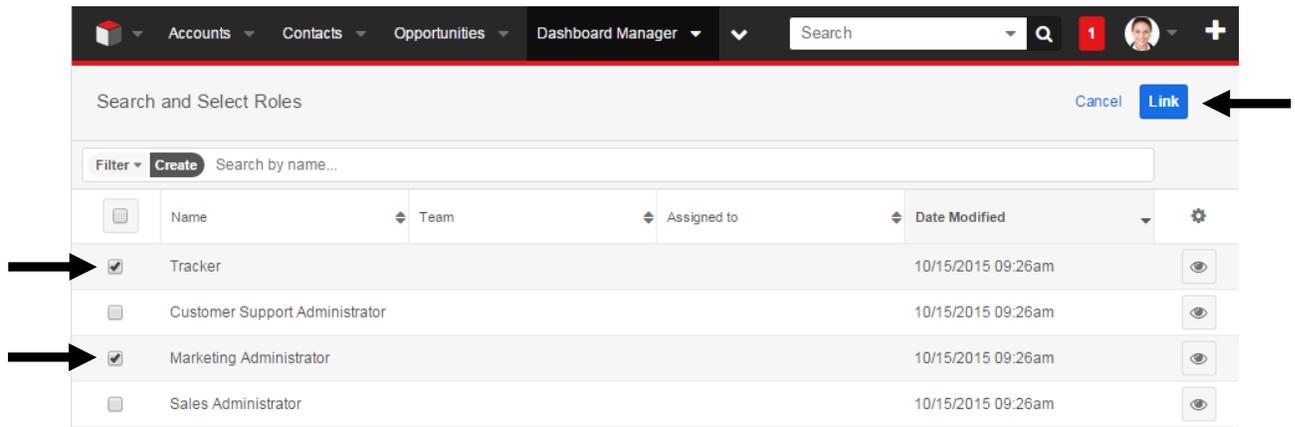


Using the Dashboard Manager – Deploying Dashboards (continued)

15. There are three options to choose from

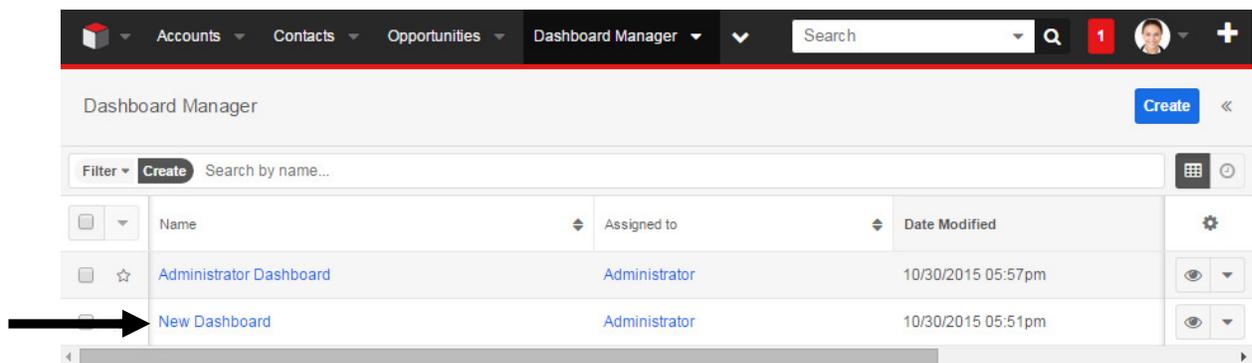
- Copy Dashboard to Roles
- Copy Dashboard to Teams
- Copy Dashboard to Users

16. You can choose to add the Dashboard to multiple users or groups (Teams or Roles) by selecting multiple checkboxes



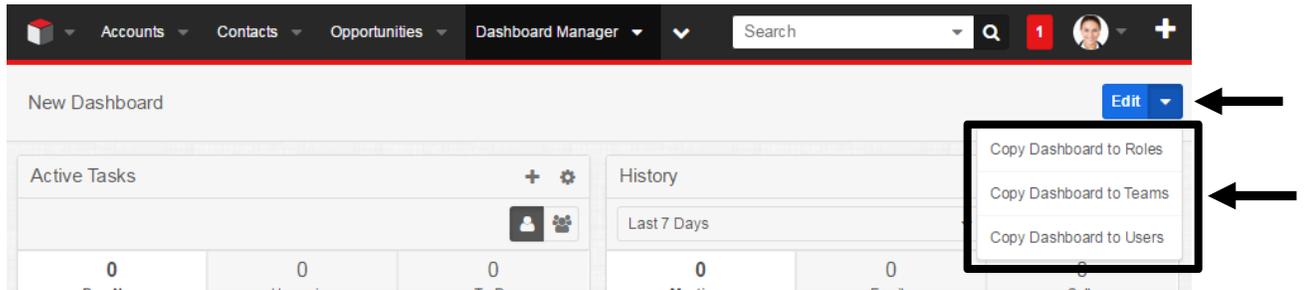
17. After selecting the users or groups click the link button to Add the Dashboard

18. To add a Dashboard from the record view click on the name of the Dashboard that you want to deploy



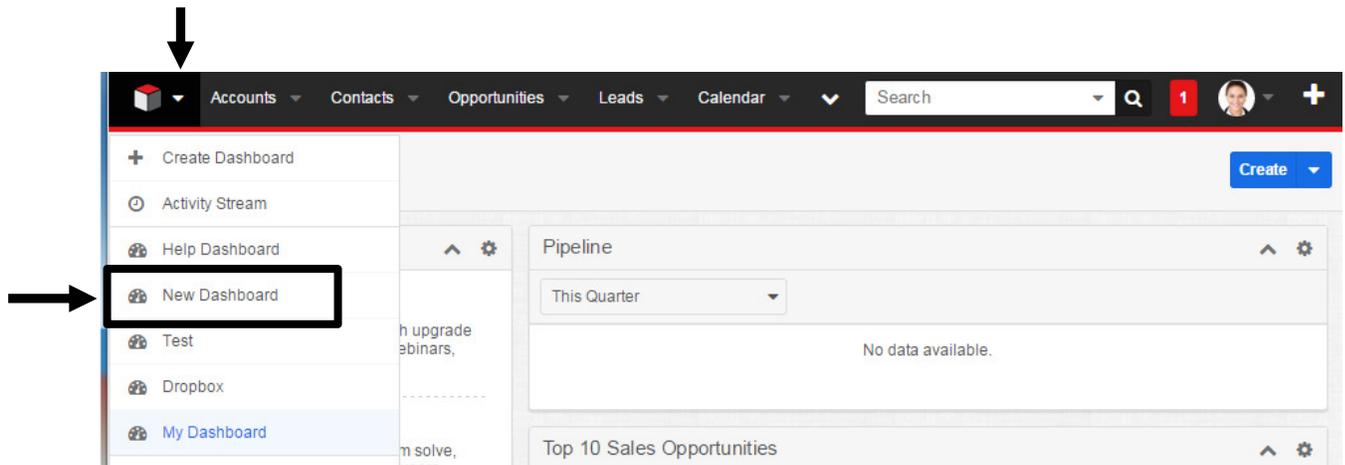
Using the Dashboard Manager – Deploying Dashboards (continued)

19. Then click on the Action menu of the “Edit” button and select one of the three options



20. Then [follow steps 16 and 17](#) to add the Dashboard

21. To confirm that a Dashboard has been added click on the Action Menu of the “Dashboard/Home” button and you will see all the Dashboards associated with the active user



****Note:** The active Dashboard is displayed with blue text

****Note:** Only Users with Admin privileges may deploy Dashboards to users or groups, BUT all users can copy their Dashboards to the Dashboard Manager

Technical Notes

Technical Notes

System requirements:

cURL and SimpleXMLElement enabled on web server
Sugar v7.x – v7.6.1.0 Professional, Enterprise, or Ultimate Edition