

Dashboard Manager v1.7

[Introduction](#)

[Release Notes](#)

[Installation](#)

[Prerequisites](#)

[Supported Releases](#)

[Supported Databases](#)

[Supported Browsers](#)

[Supported Languages](#)

[Installing the Module Package](#)

[Upgrading to the latest Dashboard Manager](#)

[Uninstallation](#)

[Uninstalling the Package through Module Loader](#)

[Manually Uninstalling the Files and Database Tables](#)

[Files to Remove](#)

[Files to Modify](#)

[Folders to Remove](#)

[Tables to Remove](#)

[Using the Dashboard Manager](#)

[Dashboard Manager](#)

[Creating a Template](#)

[Pushing Templates to Users](#)

[Association Types](#)

[One Time Default](#)

[Forced Tabs](#)

[Locked Dashboards](#)

[Editing a Template](#)

[Dashboard Backups](#)

[Creating a Backup](#)

[Manually Creating a Backup](#)

[Automatic Backups When Associating Templates to Users](#)

[Editing a Backup](#)

[Restoring a User Backup](#)

[Restoring Default Admin Backups](#)

[FAQ](#)

[Legacy Documentation](#)

[Contributors](#)

[Links](#)

Introduction

This is the help document for the Dashboard Manager package version 1.6.

Dashboard Manager allows Sugar Administrators to create and distribute dashboard elements to other users as well as set the level of customization allowed to users in modifying their resulting dashboards. The tool also provides a method to backup and restore user dashboards.

Release Notes

- 1.7
 - Added support for 6.7.x
 - Initial dashboard load bug fixes (Thanks to **Cédric Mourizard** from SYNOLIA)
- 1.6
 - Added support for 6.6.x
 - Added support for French (Thanks to **Cédric Mourizard** from SYNOLIA)
 - JavaScript bug fixes
 - Wireless layout updates
- 1.5
 - Removed support for 6.4.x
 - Removed jQuery 1.7.2 to avoid conflicts in 6.5.x

Installation

Prerequisites

Supported Releases

To install Dashboard Manager, you will first need to verify that you are on a supported release of SugarCRM.

This tool is currently supported in the following releases of SugarCRM.

6.7.x

- Professional
- Corporate
- Enterprise
- Ultimate

6.6.x

- Professional
- Corporate
- Enterprise
- Ultimate

6.5.x

- Community
- Professional
- Corporate
- Enterprise
- Ultimate

6.4.x

- Support for 6.4.x has been discontinued due to jQuery library conflicts.

* Also, please note that once you upgrade SugarCRM to 6.7.x, the tool will disable itself at which point you will need to upgrade to the latest plugin release.

Supported Databases

This plugin is currently supported for:

- MySQL
- MSSQL
- Oracle
- DB2

Supported Browsers

This plugin is currently supported for:

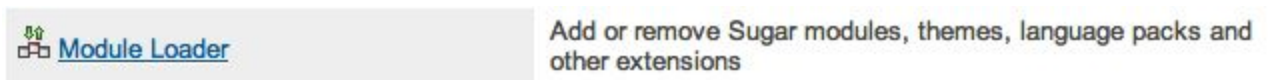
- Google Chrome 21+
- Mozilla Firefox 14+
- Internet Explorer 9+

Supported Languages

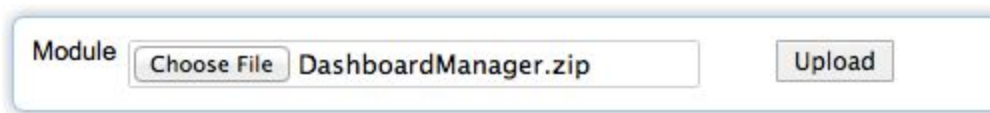
- English
- French

Installing the Module Package

1. Download the latest Dashboard Manager package from <http://www.sugarforge.org/projects/dashboardmanage/>.
2. Login to your SugarCRM instance with an administrator account.
3. Navigate to Administration.
4. Click to access Module Loader.



5. Upload the Dashboard Manager package.



6. Click 'Install' for the Dashboard Manager.

Name	Install
DashboardManager	<input type="button" value="Install"/>

7. If you agree to the License Agreement, select 'Accept' and click 'Commit'.

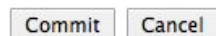
Ready To Install



Please read the following License Agreement:

PLEASE READ THIS MASTER SUBSCRIPTION AGREEMENT CAREFULLY BEFORE ACCEPTING. THE TERMS AND CONDITIONS OF THIS MASTER SUBSCRIPTION AGREEMENT, ANY ADDITIONAL TERMS AND ANY ORDER FORMS ENTERED INTO BY YOU AND SUGARCRM ARE COLLECTIVELY REFERRED TO AS THE "AGREEMENT." UNLESS OTHERWISE DEFINED HEREIN,

☐ Accept ☒ Deny



Upgrading to the latest Dashboard Manager

When upgrading to the latest Dashboard Manager, there are several important steps to follow.

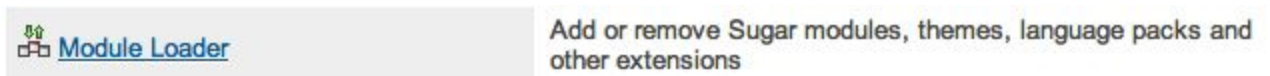
1. Make a backup of your SugarCRM filesystem.
2. Make a backup of your SugarCRM database.
3. Follow the [uninstallation](#) steps and make sure to select '**Do Not Remove Tables**' when prompted by the module loader uninstall wizard to remove database tables.
4. Follow the [installation](#) steps to install the latest package.

Uninstallation

If you should decide to upgrade or remove the Dashboard Manager tool, you can follow these approaches

Uninstalling the Package through Module Loader

1. Login to your SugarCRM instance with an administrator account.
2. Navigate to Administration.
3. Click to access Module Loader.



4. Find the 'Dashboard Manager' entry in the list of installed extensions and click 'Uninstall'.

Module Loader

The following extensions are installed on this system:

Name	Action	Enable/Disable	Type
Dashboard Manager	Uninstall	Disable	module

5. If you are planning to install an updated package, you will want to select '**Do Not Remove Tables**'. Please note that this is very important. Doing this will leave all relationship, template and backup records intact in the database for when you install the updated package.

Ready To Uninstall

☐ Remove Tables ☒ Do Not Remove Tables

If you are not planning to continue using Dashboard Manager in the future, you will want to select '**Remove Tables**'.

Ready To Uninstall

☒ Remove Tables ☐ Do Not Remove Tables

Manually Uninstalling the Files and Database Tables

If you should come across an error when uninstalling the Dashboard Manager tool, you can make the following adjustments to your codebase to remove it.

Files to Remove

- custom/modules/Home/index.php
- custom/Extension/modules/Administration/Ext/Administration/DashboardManager.php
- custom/Extension/modules/Administration/Ext/Language/en_us.DashboardManager.php
- custom/Extension/modules/Home/Ext/Language/en_us.DashboardManager.php
- custom/Extension/application/Ext/Include/DashboardManager.php
- custom/Extension/application/Ext/Language/en_us.DashboardManager.php
- custom/Extension/application/Ext/TableDictionary/dash_dashboardbackups_dash_dashboardmanager.php
- custom/Extension/application/Ext/TableDictionary/dash_dashboardmanager_users.php
- custom/Extension/application/Ext/TableDictionary/dash_dashboardmanager_users_1.php
- custom/Extension/application/Ext/TableDictionary/dash_dashboardmanager_users_2.php

These files should also be removed so they can be rebuilt by the extensions framework.

- custom/application/Ext/Include/modules.ext.php
- custom/application/Ext/TableDictionary/tabledictionary.ext.php

Files to Modify

- custom/modules/Users/logic_hooks.php

Remove the following line:

- `$hook_array['after_relationship_add'][] = Array(1, 'Force Relationship Policy', 'modules/dash_DashboardManager/logic_hooks/DashboardManager_User_Hooks.php', 'DashboardManager_User_Hooks', 'forceRelationshipPolicy');`

Folders to Remove

- custom/Extension/modules/dash_DashboardBackups/
- custom/Extension/modules/dash_DashboardManager/
- custom/modules/dash_DashboardBackups/
- custom/modules/dash_DashboardManager/
- modules/dash_DashboardBackups/
- modules/dash_DashboardManager/

Tables to Remove

**If you are upgrading, you should leave these tables as they are*

- dash_dashboardbackups
- dash_dashboardbackups_audit
- dash_dashboardbackups_dash_dashboardmanager_c
- dash_dashboardmanager
- dash_dashboardmanager_audit
- dash_dashboardmanager_users_1_c
- dash_dashboardmanager_users_2_c
- dash_dashboardmanager_users_c

Once these files, folders and tables have been removed, navigate to Admin > Repair and run a 'Quick Repair and Rebuild'.

Using the Dashboard Manager

The Dashboard Manager tool contains two modules: 'Dashboard Manager' and 'Dashboard Backups'. Once installed, a System Administrator will navigate to the 'Dashboard Management' panel under the administrative section in SugarCRM to use this tool.

Dashboard Management



Dashboard Manager

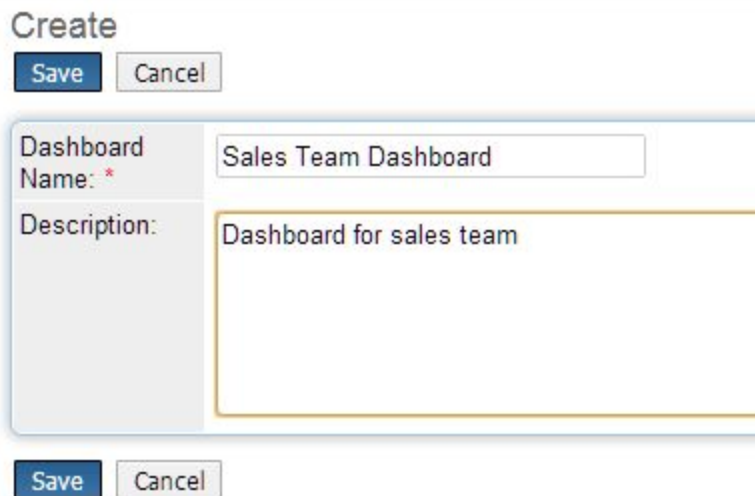
The Dashboard Manager module contains the templates you create and push out to your users.

Creating a Template

From the Admin screen, navigate to the 'Dashboard Management' panel and choose 'Dashboard Manager.' If any templates have already been created in your instance, you will see them listed here in ListView and can use the Basic and Advanced Search as you would in any other module.

Choose 'Create Template' from the Dashboard Manager shortcuts menu. If this is the first time you (as a user) have created a template, you will be prompted to back up your existing dashboard. This is because the tool will be using your dashboard to display template previews as you build your templates. Agree to create a backup of your dashboard and continue. After creating the backup, the Dashboard Manager will direct you back to the module index page, where you will again choose 'Create Template' from the shortcuts menu.

From the template's EditView, specify a unique Dashboard Name and include a Description for your template that will remind you what type of users should use this Dashboard.



The screenshot shows a 'Create' form with a title bar 'Create' and two buttons: 'Save' and 'Cancel'. Below the title bar, there are two input fields. The first field is labeled 'Dashboard Name: *' and contains the text 'Sales Team Dashboard'. The second field is labeled 'Description:' and contains the text 'Dashboard for sales team'. At the bottom of the form, there are two buttons: 'Save' and 'Cancel'.

Scroll below the Save button (**do not save**) and manipulate the dashboard template as you would when configuring a standard home screen. Take the following items into consideration when creating your template:

- **IMPORTANT:** While actively creating a template, **do not** navigate to your home page in another browser window or tab. Because your dashboard powers the Dashboard Manager, you may compromise the design of the template you are actively editing.
- Dashlet filters that you choose will be pushed to users but will be editable for all Association Types (association types explained further in document).


- Custom labels on Dashlets will be pushed to users but will be editable for all Association Types.
- Custom labels on Pages will be pushed to users but will be editable for all Association Types except the 'Locked Dashboards' type.

Once you are satisfied with the design of the template, click 'Save'.


*Please note that your personal dashboard will be overridden by creating or editing a template in Dashboard Manager. Refer to the 'Restoring Default Admin Backups' section of this article to learn how to create and restore backups easily for your affected admin account.

Pushing Templates to Users


After you have created a template, you can push it to users from the subpanels in the DetailView of the template. To push a dashboard template to a user, you must first choose one of three levels of security (One Time Default, Forced Tabs, or Locked Dashboards). These levels are represented as subpanels on the EditView form. Use the 'Select' button on that subpanel to choose the user(s) to push the template to.

Users: One Time Default


<div>Select ▼</div>		
Name ⇅	User Name ⇅	Email ⇅
No Data		

Users: Forced Tabs


<div>Select ▼</div>		
Name ⇅	User Name ⇅	Email ⇅
No Data		

Users: Locked Dashboards


<div>Select ▼</div>		
Name ⇅	User Name ⇅	Email ⇅
No Data		

Association Types

When relating users to templates, you can choose from 3 behaviors.

One Time Default

Dashboard is defaulted once for the selected users. This will remove any existing non-template pages and dashlets. Once defaulted, the user is then removed from this association and is free to manipulate the dashboard.

Restricted User Actions:

- None

Allowed User Actions:

- All

Forced Tabs

The dashboard template is forced to be the first tabs in users existing dashboard. Existing pages and dashlets are retained. Users cannot manipulate a forced page or dashlet. Otherwise the user is free to manipulate other pages and dashlets in the dashboard. Configurations to the template such as dashlet arrangement, adding/removing pages and page naming will be forced out to users on a permanent basis. Dashlet options such as naming, filters and columns will only be forced out to users initially.

Restricted User Actions:

- Adding/Removing Forced Pages
- Renaming Forced Pages
- Adding/Removing Forced Dashlets
- Rearranging Dashlets on Forced Pages

Allowed User Actions:

- Configuring Options/Filters/Naming of Forced Dashlets
- All Actions on Non-Forced Pages and Dashlets

Locked Dashboards

Dashboard is locked for selected users and most dashboard actions will be prevented. This will remove any existing non-template pages and dashlets. Configurations to the template such as dashlet arrangement, adding/removing pages and page naming will be forced out to users on a permanent basis. Dashlet options such as naming, filters and columns will only be forced out to users initially.

Restricted User Actions:

- Adding/Removing Pages
- Renaming Pages
- Adding/Removing Dashlets
- Rearranging Dashlets

Allowed User Actions:

- Configuring Options/Filters/Naming of Dashlets

Editing a Template

If you'd like to push a dashboard update to a template's associated users, you can edit the template at any time. Keep in mind this only applies to Forced Tabs and Locked Dashboards association types.

Prior to editing a template, use the Creating a Backup instructions below to back up your current dashboard and set the new backup as the default. Editing a template will override your personal dashboard.

To edit a template:

1. Navigate to the DetailView of the Dashboard template record.
2. Click 'Edit'.
3. Manipulate the dashboard template as you would a standard home screen.
4. Click 'Save'.

After saving, the associated users will see the changes the next time they reload their home pages. Any filters/options/naming they had configured for dashlets on pushed pages will remain intact as long as those dashlets weren't changed or removed by the administrator.

*Please note that your personal dashboard will be overridden by creating or editing a template in Dashboard Manager. Refer to the 'Restoring Default Admin Backups' section of this article to learn how to create and restore backups easily for your affected admin account.

Dashboard Backups

The Dashboard Backup module contains the backups generated when users are pushed dashboard templates. You can also manually create backups for users.

Creating a Backup

There are two ways that backups can be created: Automatically when a new template is associated to a user or Manually.

Manually Creating a Backup

To manually create a backup:

1. Navigate to Administration.
2. Navigate to 'Dashboard Backups'.
3. Click 'Create Backup'.
4. Select the user you would like to backup the homepage for.
*If you are creating a backup for yourself and would like for it to be your default backup, check the 'default' checkbox.
5. Click 'Save'.

Automatic Backups When Associating Templates to Users

When you first associate a user to a template, the user's existing homepage will automatically be backed up in case of an issue. These backups will be related to the user and shown in the subpanel 'Associated User Backups' on a template's DetailView.

Editing a Backup

It is currently not possible to edit an existing backup. The best approach would be to restore the backup to the user, edit it as desired and create a new backup.

Restoring a User Backup

If you should come across an issue and need to restore a user's homepage, you can navigate to the Dashboard Backups module and do the following:

1. Navigate to the DetailView of the backup record you would like to restore.
2. Click 'Restore Users Dashboard'.
3. Confirm that you would like to restore the dashboard in the popup window.

This will restore the dashboard to the user. Please note that this does not allow you to restore a user's backup to another user. To push dashboards to users, you'll need to create a template then associated the template to the desired users.

Restoring Default Admin Backups

Since the administrator's personal dashboard is replaced by whatever template you

are editing in the Dashboard Manager, it is important to always create a backup of your dashboards prior to editing any templates. On your Sugar home page's upper left-hand side, there is a link that makes restoring your personal dashboard easy. Clicking the link will restore your "default" backup. So, whenever creating a backup for yourself for this purpose, be sure to mark it as default so that the correct backup can be recognized and restored.

FAQ

Q) What happens if I force two different saved dashboards to one user?

A) This isn't possible. Any time you associate a user to a new dashboard template, they are unassociated from any other templates.

Q) What happens if I push a dashboard template to 20 users. A month later I edit that dashboard and add an additional tab.

A) For users in a Locked or Forced association with the template, a backup will be made of their current dashboard and the changes will be merged on their next visit to their homepage.

Q) What happens if I push a dashboard to 20 users. A month later I want to add an additional tab to only 10 of those users' home screens. Do I create a second saved dashboard with only that tab to push to the 10 users? Or do I clone the original template, add a tab to the clone, remove the original template from only the 10 users and push out the new to them?

A) In order to preserve the users' existing modifications to the original template, you'll need to complete the following steps:

1. Duplicate the existing template.
2. Add new pages or dashlets as desired.
3. Do not remove or replace pages or dashlets unless you want those elements to be removed from the users' dashboards along with any modifications they may have made.
4. Associate the 10 users to this new duplicated template.

By duplicating the dashboard and then moving users to it, their dashlet settings will remain intact. This will result in a new template with all users attached to it while the old template still exists, but has no associated users.

Q) If I remove a user from a template, does the layout stay or does it disappear for the user?

A) The homepage layout stays and becomes editable to the user.

Legacy Documentation

[Dashboard Manager v1.0](#)

[Dashboard Manager v1.5](#)

[Dashboard Manager v1.6](#)

Contributors

Cédric Mourizard (from SYNOLIA): French Language Pack

Chris Raffle (from SugarCRM): Documentation

Ellen True (from SugarCRM): Documentation

Jerry Clark (from SugarCRM): Development, Documentation

Jill Shaheen: Beta Testing, Documentation

Manuel Sevilla (from Plus Consulting): Documentation

Links

[Github: Dashboard Manager Source](#)

[SugarForge: Dashboard Manager Project](#)