
wUserUtils User Guide

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wUserUtils User Guide

Overview

wUserUtils is a paid add-on for Sugar that enables admins to effortlessly manage Sugar user and team settings. Copy dashboards, filters, and locale settings, making new-user setup quick and easy. wUserUtils also enables admins to troubleshoot user issues and broadcast global messages in Sugar. This guide covers how administrators can engage with the extension after it has been installed by an administrator. For more information on installing the plug-in, please refer to the [W-Systems Product Installation Guide](#).

Note: This guide pertains to the latest release of wUserUtils. If you are not using the latest version of wUserUtils, then you may not have access to some of the features listed on this page. Please refer to the [W-Systems Supported Platforms](#) page for more information on the latest package versions.

Features

- [Clone User Settings](#): wUserUtils can significantly reduce the time it takes to set up new Sugar users by allowing you to clone filters, dashlets, email settings, and much more from existing users. Note that cloning will overwrite existing user settings.
- [Copy Dashboards](#): You recently built out a new dashboard and need to share it with your team. wUserUtils allows you to select specific dashboards from any Sugar module and send it to any team or user, without overwriting their existing settings.
- [Share Filters](#): If your team uses the same List View filters, you won't need to ask employees to manually build them out—wUserUtils can easily copy a user's filters and share them with others.
- [Remove Filters or Dashboards](#): One of your employees has transferred to another team or your current dashboards have become deprecated. wUserUtils enables you to easily remove dashboards or filters from users and teams.
- [Mass Update Locale Settings](#): wUserUtils enables you to mass update locale settings, such as date and time, currency, and more. It also allows you to copy these settings to users or teams based on your employee locations.
- [Impersonate Users](#): If you want to check the updates made through wUserUtils, the LoginAs functionality enables you to view how specific users see Sugar while logged in. This functionality is also useful for troubleshooting user-reported issues.

- [Maintenance Mode](#): wUserUtils allows your admins to prevent regular Sugar users from logging in. This functionality can be used while performing upgrades, troubleshooting issues, or running resource-heavy processes.
- [Broadcast Messages and Alerts](#): With wUserUtils, you can set up and schedule global messages, informing your Sugar users of any planned admin activities, such as maintenance or upgrades. This message will also get displayed on the login screen.

wUserUtils Functionality

After [installing the wUserUtils package to Sugar](#), a new section will be available on the Administration page for wUserUtils.

wUserUtils

Miscellaneous User Utility Tools

User Preference Management and Cloning	Save time by cloning and managing user preferences, dashboards, filters. Control 'Login As' access and System Maintenance Mode	Broadcast Message	Configure a globally visible message header
Restrict Login Hours	Specify the hours when users can log in.		

This section contains the following settings:

- [User Preference Management and Cloning](#): Clone and manage your users' preferences, dashboards, and filters; control "Login As" access and System Maintenance Mode.
- [Broadcast Message](#): Compose a message to be displayed as a banner in Sugar to targeted users active in the system (e.g., maintenance window alerts).
- [Restrict Login Hours](#): Set up the time intervals between which regular users have access to Sugar, usually used to restrict access during maintenance periods.

wUserUtils also provides the following functions that surface directly in the application:

- [Copy Dashboards](#): Adds a "Copy Dashboard" option to the dashboard Actions menu that will push copies of the dashboard out to users, teams, or roles.
- [Copy Filters](#): Adds a "Copy Filter" option to the list view filter's Actions menu that will push copies of the filter out to users, teams, or roles.

- [Notifications](#): wUserUtils leverages the Notifications module in Sugar to serve as an Audit Log of wUserUtils changes performed by Admin users.
- [Scheduled Job](#): Optionally, you can queue user updates to occur in batches, which will prevent potential performance issues for large changes.

User Preference Management and Cloning

Navigate to the wUserUtils panel on the Admin page and click on "User Preference Management and Cloning".

The User Preference Management and Cloning settings section provides several configuration options:

- [Source and Destination teams, users, or roles](#): In this section, users can set up the following:
 - **Source user**: here, admins can set up the user from which they want to copy the settings (filters, dashboards, dashlets) or delete records (filters, dashboards - options from the **Filters** and **Dashboards** tabs).
 - **Destination Teams** and/or **Destination Users** and/or **Destination Roles**: here the user will select the team(s) and/or user(s) and/or role(s) to which he wants to copy the settings (filters, dashboards, dashlets) or delete records (filters, dashboards - action from Delete tab).
- [General Tab](#): The General tab offers the possibility to add multiple

preferences at a time to the destination team(s)/user(s)/role(s).

- [Dashboards Tab](#): Here the user can add dashboards from the source user to the destination team(s)/user(s)/role(s), or they can delete dashboards from the source user.
- [Filters Tab](#): the admin can add filters from the source user to the destination team(s)/user(s)/role(s) or to delete filters from the source user.
- [Delete Tab](#): the admin can delete dashboards or filters from the destination team(s)/user(s)/role(s).
- [wColumns Tab](#): This option is only available for wColumnsSet users. wColumnSet is an additional add-on package from W-Systems. This tab allows the Admin user to select the wColumn configuration that they want to add to the Destination teams and/or users and/or roles.
- [Locale Settings Tab](#): Locale Settings can be copied from the source user to the destination team(s)/user(s)/role(s)
- [LoginAs Authorization Tab](#): Here can be selected from Users/Teams/Roles regular users that should have access to the LoginAs functionality.
- [Maintenance Mode Tab](#): The Maintenance Mode tab allows the administrator to activate or deactivate the maintenance mode of the system.
- [User Convert Tab](#): The User Convert Tab allows admin users to convert User Groups into Individual Users or Individual Users into Group Users.
- [Field Name Placement Tab](#): Apply the Field Name Placement setting to one or more User(s), Team(s), or Role(s).

Source and Destination Users

In this section, users can set up the following preferences:



Clone User Preferences

Full Name Search Clear [Advanced Search](#)

Run without Scheduled Job

Source User	Mihaela Bulacu	Destination Teams	East West	Destination Users	(Undefined First Name) (Undefined Last Name) Administrator (Undefined First Name) Sugar Customer Chris Olliver Jim Brennan Max Jensen Mihaela Bulacu Sally Bronsen Sarah Smith MILL/Martin	Destination Roles	Select roles
-------------	----------------	-------------------	-----------	-------------------	--	-------------------	--------------

- **Source User**: the user from which the user wants to copy the settings (filters, dashboards, dashlets) or delete records (filters, dashboards - options from Filters and Dashboards tabs).
- **Destination Teams**: here the Admin user will select the team(s) to which he wants to copy the settings (filters, dashboards, dashlets) or delete

records (filters, dashboards – actions from Delete tab).

- **Destination Users:** here the Admin user will select the user(s) to which he wants to copy the settings (filters, dashboards, dashlets) or delete records (filters, dashboards – action from Delete tab).
- **Destination Roles:** here the Admin user will select the role(s) to which he wants to copy the settings (filters, dashboards, dashlets) or delete records (filters, dashboards – action from Delete tab).

Notes:

- If only **Destination Teams** are selected, then the settings will be added to all users that belong to the selected team(s).
- If only **Destination Users** are selected, then the settings will only be added to the selected user(s).
- If only **Destination Roles** will be selected then, the settings will be added to all users that belong to the selected role(s).
- If **all three options are selected**, then the settings will be added to all users that belong to the selected team(s) and selected user(s) and selected role(s).

In case the Admin user forgets to set a **destination team/user/role** they will be notified:

The screenshot shows a CRM interface with a top navigation bar containing 'Accounts', 'Contacts', 'Opportunities', 'Leads', 'Calendar', and 'Notifications'. Below the navigation bar is a 'Notifications (20 of 21+)' section. It includes a search bar with 'Filter' and 'Create' buttons, and a table of notifications. The table has columns for 'Severity', 'Subject', 'Related to', 'Status', and an eye icon. One notification is highlighted in blue and has a red box around its subject: 'You have to select at least one destination user/team.' The notification is from 'DocuSign Info' and is marked as 'Unread'.

When setting a destination, Administrators can set up filters from the **Users** module to filter and sort selections in the **Destination** users selection window. The **Destination Users** area will only show users that meet filter criteria chosen in the filter/search section:

Clone User Preferences

Full Name Search Clear [Advanced Search](#)

Run without Scheduled Job

Source User	(Undefined First Name) Admir	Destination Teams	East West	Destination Users	Mihaela Bulacu
-------------	------------------------------	-------------------	--------------	-------------------	----------------

The **Destination Users** can be selected from the filtered list.

General Tab

- [Clone Dashlets](#)
- [Clone Favorite Reports](#)
- [Clone Sugar Email Client](#)
- [Clone Scheduled Reporting](#)
- [Reset Initial Password](#)
- [Clone Notify on Assignment](#)
- [Clone Reminder Options](#)
- [Clone Default Teams](#)
- [Clone Navigation Bar Module Selection](#)
- [Clone Filters](#)

Clone Dashlets

The Clone Dashlets action can be found in the General tab of the User Preference Management and Cloning settings.

This option will create duplicate dashlets for the **Destination User**, similar to those available for the **Source User**.

General Dashboards Filters Delete Locale Settings LoginAs

Clone Dashlets

Select the modules you want to clone the dashlets on

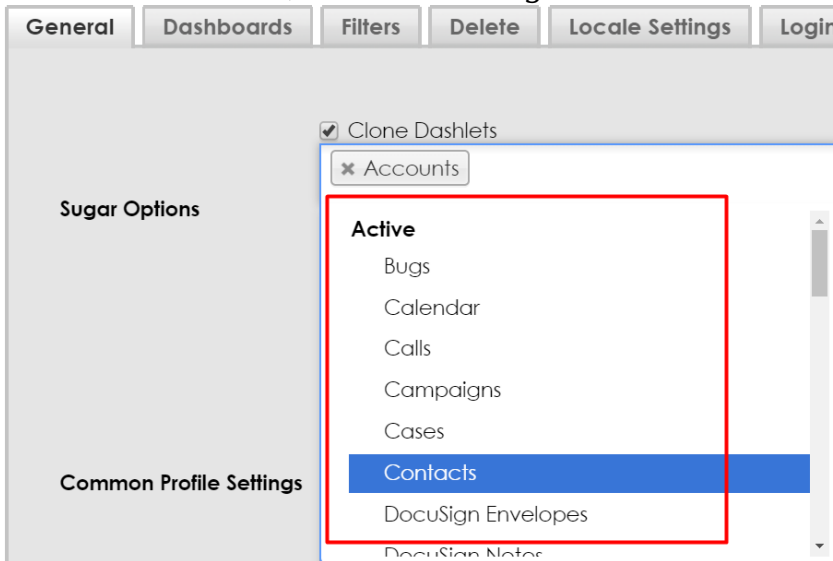
Sugar Options

Clone Favorite Reports

Clone Sugar Email Client

Clone Scheduled Reporting

To clone dashlets, select the target module on which you want to add the dashlets.




Once the **Clone** button is pressed, all available dashboards with all their dashlets (including the dashlet' s filter for **List View** dashlets) will be added to the destination team(s)/user(s)/role(s) on the selected module(s).

If you don't pick any target module, then all dashboards from all modules, including **Home** page, will be added to the destination user(s)/team(s)/role(s).




The **Destination User** should see on the **Home dashboard**, on the module **List View** and **Record View** (if custom dashboards exist) the same dashboards that the **Source User** has configured for their views.





When the cloning operation is complete, a message will be displayed on **Clone User Preference** view and also a **Notification** message will appear in the right corner near the **User Menu** and in the **Notifications Module**:

done.....


 Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Notifications

Notifications (20 of 21+)

Filter ▾ **Create** Search by subject...   

<input type="checkbox"/>	Severity	Subject	Related to	Status	
<input type="checkbox"/>	wUserUtils Info	Cloning user dashl...		Unread	
<input type="checkbox"/>	wUserUtils Info	Cloning user dashlets... OK		Unread	
<input type="checkbox"/>	wUserUtils Info	You have to select ...		Unread	

Admin users can add more refined dashboards by using the **Add Dashboards** cloning option, available in the **Dashboards** tab.

General **Dashboards** Filters Delete Locale Settings

Select dashboards

Append Text

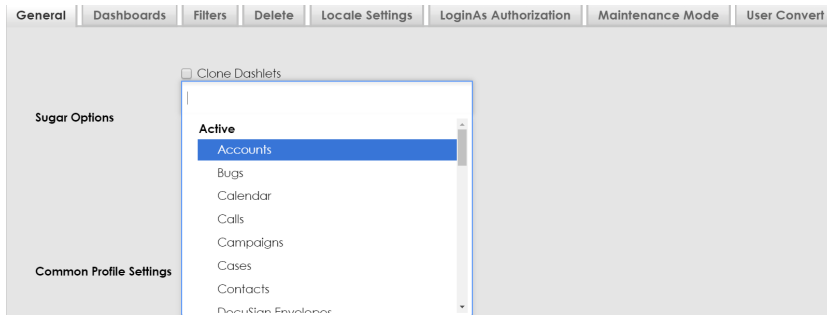
Prepend Text

Clone Dashlets vs. Add Dashboards

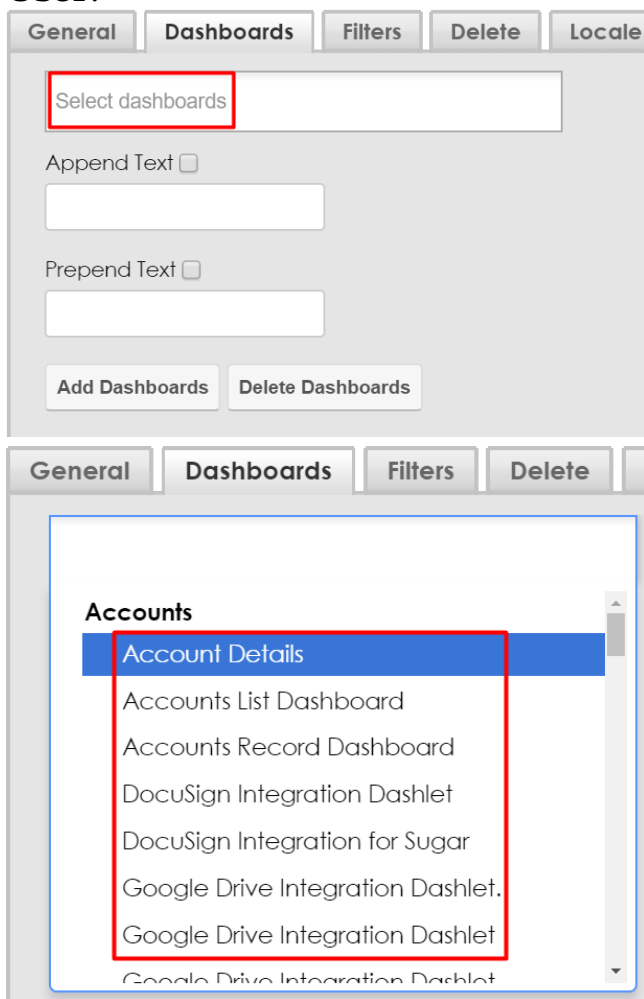
There are a couple differences between the two options that will be explained below.

- Clone Dashlets:** this option allows Admin users to only select the module, and the wUserUtils package will automatically add all the custom dashboards available for the Source User, to the Destination User, for the selected module(s).

Note: Using the **General** tab to clone dashlets will overwrite all the user's existing dashboards for a specified module. This is the best option Admin users have when they want to set up new Sugar users.



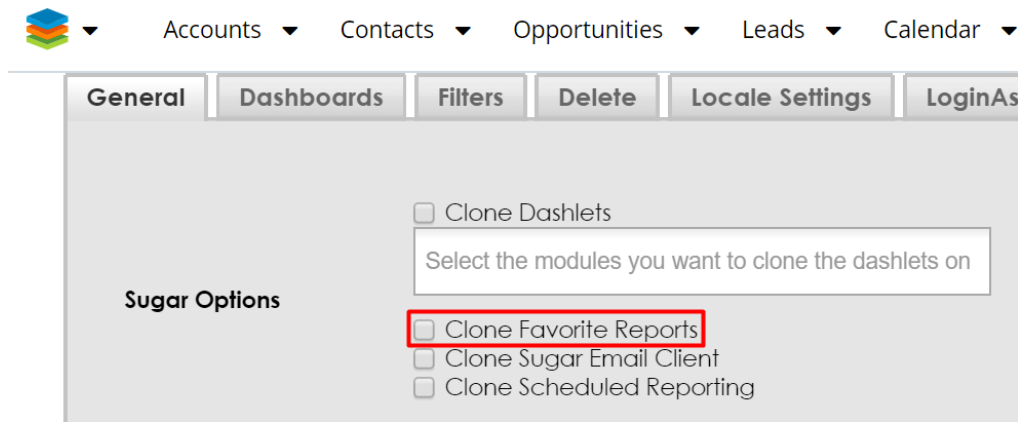
- **Add Dashboards:** this option allows Admin users to choose which dashboard available for each module will be cloned for the **Destination User**.



Note: Using the **Dashboard tab** to add dashlets will append dashboards to the user's existing dashboards. If a user already has the dashboard which is being copied, then that specific dashboard will get **overwritten/updated** (not all dashboards). This is useful to apply new dashboards for users, or update modified dashboards to users.

Clone Favorite Reports

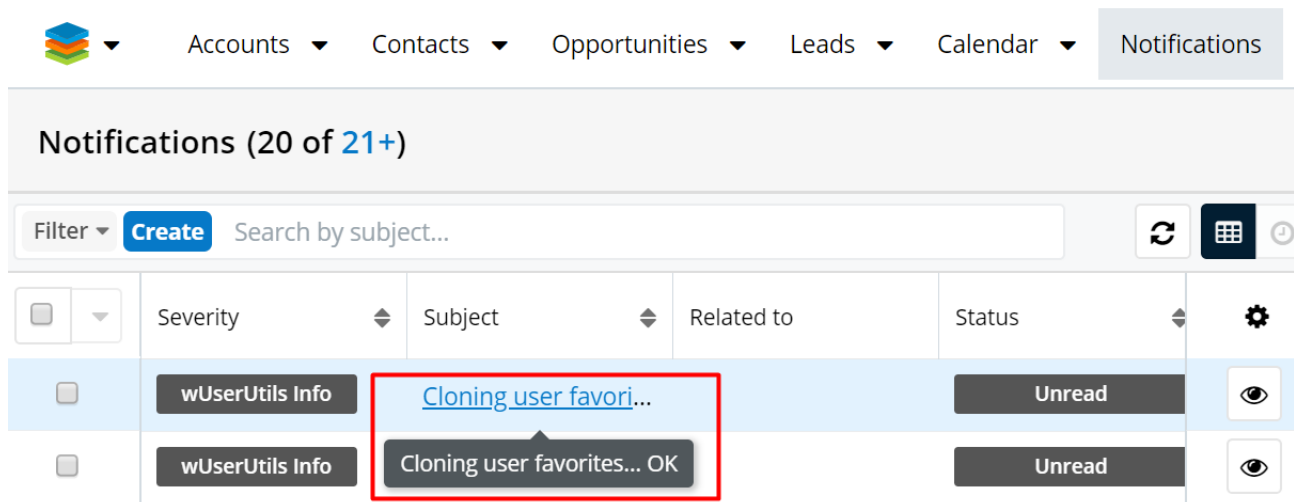
The **Clone Favorite Reports** option can be found on the **Clone User Preference** view on the **General** tab.



This option allows Admin users to add reports from the Source User to a **Destination Team(s)/User(s)/Role(s)**. It will also set them as favorites.

When the cloning operation is complete, a message will be displayed on **Clone User Preference** view and also in the **Notifications** module.

done.....



A notification message will appear in the right corner, near the **User Menu**:

Sender	Message	Time
wUserUtils Info	Cloning user favorites... OK	a few seconds ago
wUserUtils Info	Cloning user favorites... OK	a minute ago
wUserUtils Info	Cloning user dashlets... OK	37 minutes ago
wUserUtils Info	Nothing was selected.	an hour ago
wUserUtils Info	You have to select at least ...	an hour ago

The **Destination User** should see on the **Reports module** the favorite reports that the **Source User** has:

Reports [v] [i] Search

- + Create Report
- ≡ View Reports
- ▮ Manage Advanced Reports
- ≡ Report Schedules
- ★ Tasks due This Week
- ★ Tasks Completed by Users by Wee...
- ★ Open Tasks

Accounts | Contacts | Opportunities | Leads | Calendar | Reports [v] [i]

Reports (20 of 21+) [Create]

Filter [Create] Search by name...

<input type="checkbox"/>	Name	Module	Report Type	User	Accessed On	[i]
<input type="checkbox"/>	★ Tasks due This ...	Tasks	Rows and Colu...	Administrator		[i] [v]
<input type="checkbox"/>	★ Tasks Complet...	Tasks	Matrix	Administrator		[i] [v]
<input type="checkbox"/>	★ Open Tasks	Tasks	Rows and Colu...	Administrator		[i] [v]
<input type="checkbox"/>	★ Number of Op...	Tasks	Matrix	Administrator		[i] [v]
<input type="checkbox"/>	★ My Open Tasks...	Tasks	Matrix	Administrator		[i] [v]
<input type="checkbox"/>	☆ Top Grossing P...	Revenue Line I...	Summation	Administrator		[i] [v]

Clone Sugar Email Client

This option allows Admin users to clone the **Email Client** from the **User Profile** to

one or more **Users**, or to **Teams** or **Roles**.

The screenshot shows the 'Users' settings page in SugarCRM. Under the 'Sugar Options' section, the checkbox for 'Clone Sugar Email Client' is checked and highlighted with a red box. Below this, the 'Email Settings' section shows the 'Email Client' dropdown menu set to 'Sugar Email Client', also highlighted with a red box.

When the cloning operation is complete, a message will be displayed on **Clone User Preference** view and also in the **Notifications** module.

done.....

The screenshot shows the 'Notifications' module in SugarCRM. A notification is highlighted with a red box, showing the subject 'Cloning Sugar Email Client selection...' and a status of 'Unread'. A tooltip is visible over the notification, displaying 'Cloning Sugar Email Client selection...' and 'OK'.

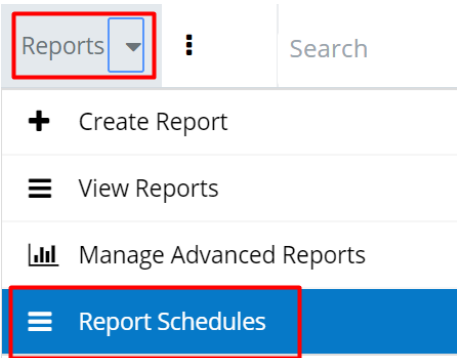
A notification message will appear in the right corner near the **User Menu**:

The screenshot shows the 'User Menu' in SugarCRM. A notification is highlighted with a red box, showing the subject 'Cloning Sugar Email Client...' and a timestamp of '3 minutes ago'. A tooltip is visible over the notification, displaying 'Cloning Sugar Email Client selection...' and 'OK'.

Clone Scheduled Reporting

Reports need to be scheduled for each user account in order for Sugar to process the reports for delivery.

A report can be scheduled from the **Reports** module, in the **Schedule Report** column.



The Admin user can pick a report which is not scheduled for delivery, meaning that the **Schedule Report** column shows "*—none—*".

When the user clicks on the "*—none—*" link, the **Schedule Report** window opens. Here the user can select the **Start Date and Time**, **Time Interval**, **Check the Active** checkbox and then press "**Update Schedule**":

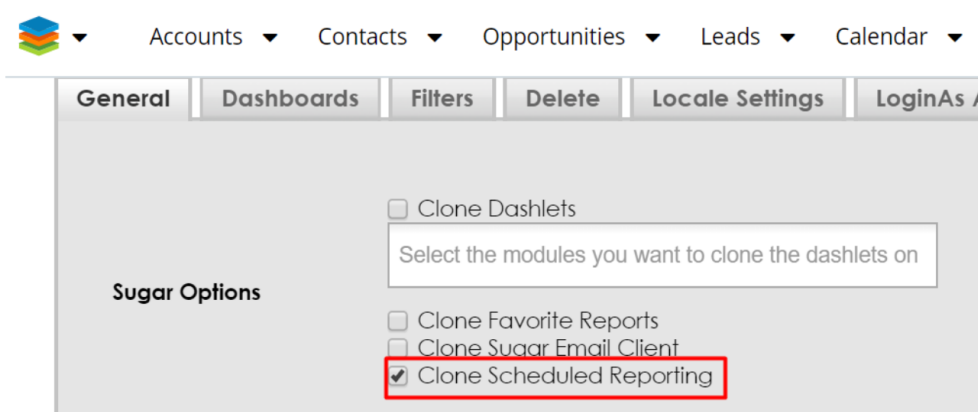
The image shows the 'Report Schedules' window. At the top, there are navigation tabs for 'Accounts', 'Contacts', 'Opportunities', 'Leads', and 'Report Schedules'. Below the tabs, there is a search bar and a 'Create' button. The main content is a table with the following columns: Name, Report, Repeat Type, Active, and Assigned to. The table contains two rows of data. The first row is for 'Recently Close...' and the second row is for 'Tasks due This ...'. The 'Active' checkbox for the second row is checked and highlighted with a red box.

	Name	Report	Repeat Type	Active	Assigned to
<input type="checkbox"/>	Recently Close...	Recently Close...	Weekly	<input type="checkbox"/>	Administrator
<input type="checkbox"/>	Tasks due This ...	Tasks due This ...	Weekly	<input checked="" type="checkbox"/>	Administrator

The **Clone Schedule Reporting** option can be found on the **Clone User Preference view** on the **General** tab. This preference allows **Admin users** to clone the **Schedule Report** column from a source user to a destination team(s)/user(s)/role(s).

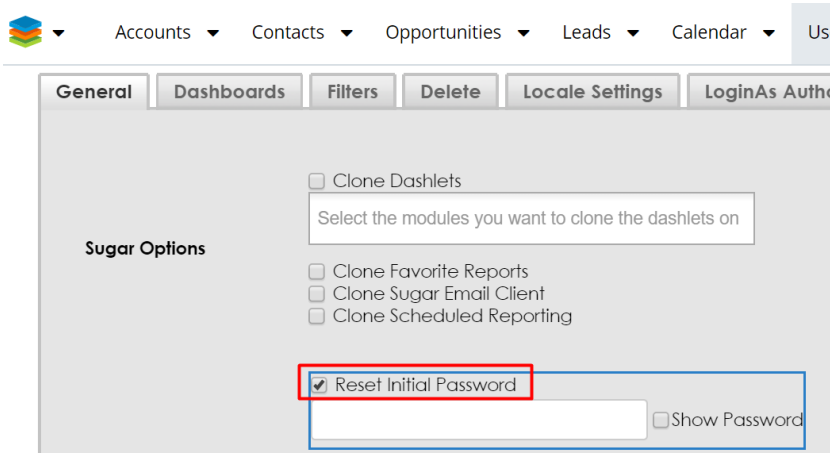
When the clone operation is complete, a message will be displayed on Clone User Preference view and also a notification message will appear in the right corner

near the user menu:



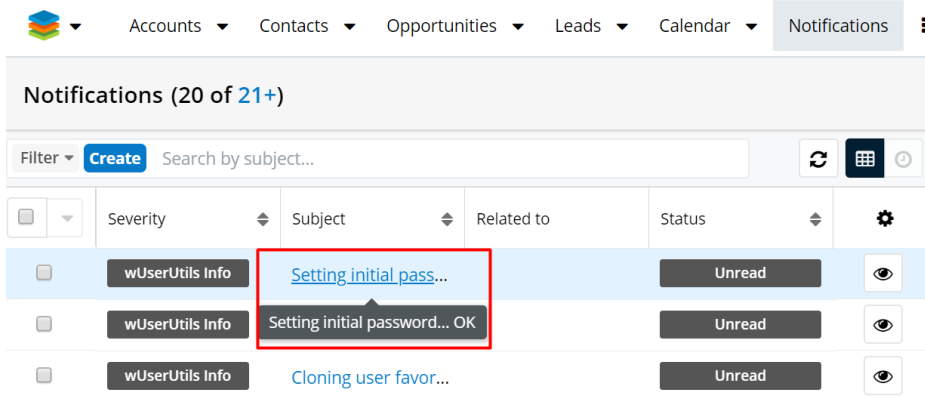
Reset Initial Password

The Reset initial password option is a useful tool for Admin users. It offers them the option to reset the password for all selected destination team(s)/user(s)/role(s) or for themselves, with the one from the **Password** field. This preference can be found on the **Clone User Preference view** on the **General** tab. The user will fill in the **Password** field and select the list of users that require a password reset.

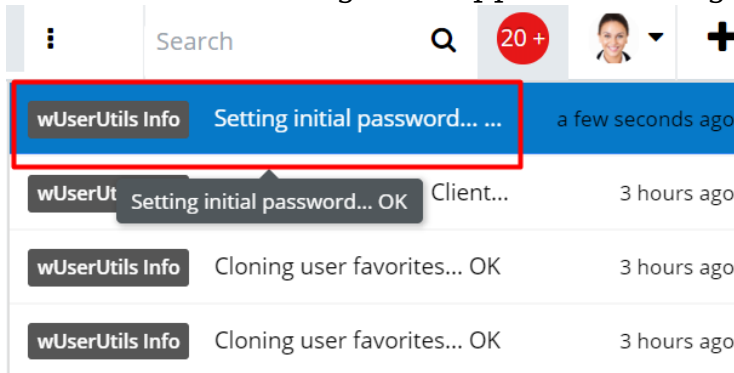


When the cloning operation is complete, a message will be displayed on **Clone User Preference view** and also in the **Notifications module**.

done.....



A notification message will appear in the right corner near the **User Menu**.

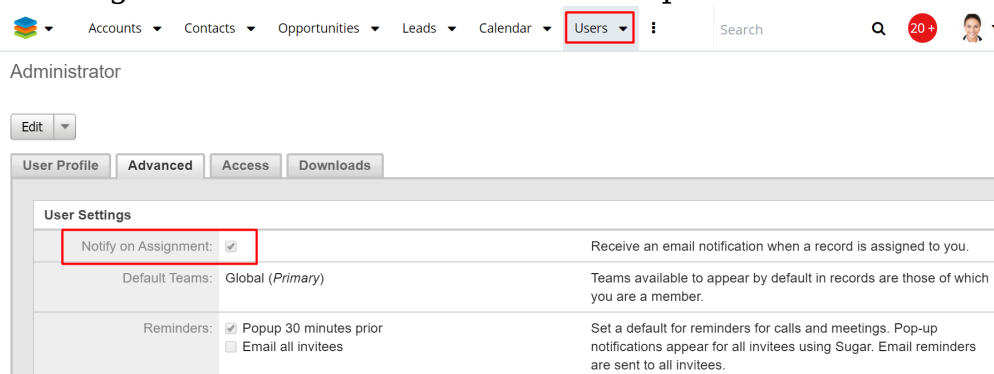


Now, all the users that were selected as **Destination Users** will be able to connect to Sugar with their new password.

Clone Notify on Assignment

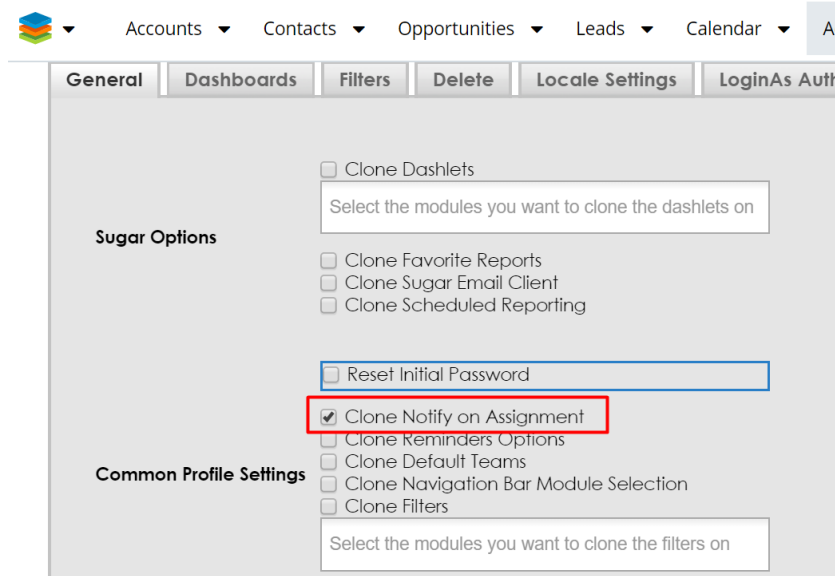
The **Clone Notify on Assignment** preference can be found on the **Clone User Preference view**, under the **General** tab.

From here, the Admin user can choose if they want to check or uncheck the Notify on Assignment checkbox from the user's profile.



After cloning this preference, the **Notify on Assignment** checkbox value from the

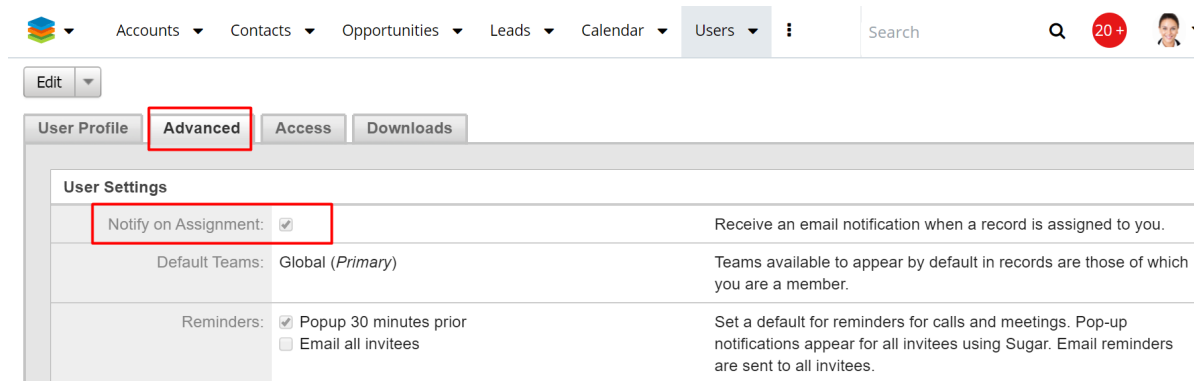
Source User will be added to the destination team(s)/user(s) on each profile user.



The screenshot shows the 'Clone User Preference view' in SugarCRM. The 'Clone Notify on Assignment' checkbox is checked and highlighted with a red box. Other options include 'Clone Dashlets', 'Clone Favorite Reports', 'Clone Sugar Email Client', 'Clone Scheduled Reporting', 'Reset Initial Password', 'Clone Reminders Options', 'Clone Default Teams', 'Clone Navigation Bar Module Selection', and 'Clone Filters'. There are also text boxes for selecting modules to clone dashlets and filters on.

When the clone operation is complete, a message will be displayed on the Clone **User Preference view**, a notification will be displayed on the **Notifications module**, and a notification message will appear in the right corner near the User Menu.

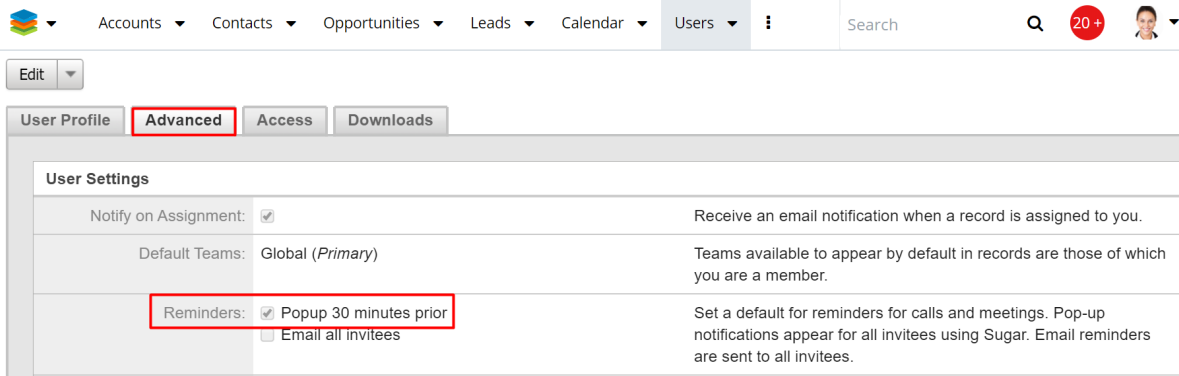
The **Destination User** should see this option cloned under the **User Profile**, the **Advanced** tab.



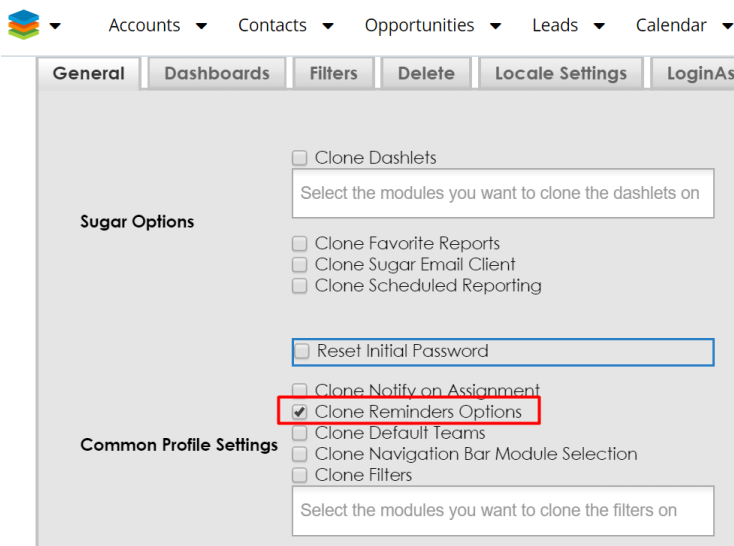
The screenshot shows the 'Destination User's User Profile' in SugarCRM. The 'Advanced' tab is selected, and the 'Notify on Assignment' checkbox is checked and highlighted with a red box. Other settings include 'Default Teams: Global (Primary)' and 'Reminders: Pop-up 30 minutes prior' and 'Email all invitees'.

Clone Reminder Options

The **Clone Reminders Options** preference can be found on the **Clone User Preference view** under the **General** tab. From here, the Admin user can choose if they want to check or uncheck the Reminders checkboxes from the user's profile.



This action will clone the values of the Reminder checkbox from Source User to the destination team(s)/user(s)/role(s) on each profile user.



When the clone operation is complete, a message will be displayed on the **Clone User Preference view**, a notification will be displayed on the **Notifications module**, and a notification message will appear in the right corner near the **User Menu**.

The **Destination User** should see this option cloned under the **User Profile**, the **Advanced** tab.

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Users ▾

Search 🔍 20+ 👤

Edit ▾

User Profile **Advanced** Access Downloads

User Settings

Notify on Assignment:	<input checked="" type="checkbox"/>	Receive an email notification when a record is assigned to you.
Default Teams:	Global (Primary)	Teams available to appear by default in records are those of which you are a member.
Reminders:	<input checked="" type="checkbox"/> Popup 30 minutes prior <input type="checkbox"/> Email all invitees	Set a default for reminders for calls and meetings. Pop-up notifications appear for all invitees using Sugar. Email reminders are sent to all invitees.

Clone Default Teams

The Clone Default Teams action can be found on the **Clone User Preference view** under the **General** tab. From here, the user will add the same default teams from source user to destination team(s)/user(s).

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Users ▾

Search 🔍 20+ 👤

User Settings

Notify on Assignment:	<input checked="" type="checkbox"/>	Receive an email notification when a record is assigned to you.
Default Teams:	Global (Primary)	Teams available to appear by default in records are those of which you are a member.
Reminders:	<input checked="" type="checkbox"/> Popup 30 minutes prior <input type="checkbox"/> Email all invitees	Set a default for reminders for calls and meetings. Pop-up notifications appear for all invitees using Sugar. Email reminders are sent to all invitees.

All default teams from the **Source User** will be added to the destination team(s)/user(s)/role(s) on each profile user.

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾

General Dashboards Filters Delete Locale Settings LoginAs A

Sugar Options

- Clone Dashlets
Select the modules you want to clone the dashlets on
- Clone Favorite Reports
- Clone Sugar Email Client
- Clone Scheduled Reporting
- Reset Initial Password
- Clone Notify on Assignment
- Clone Reminders Options
- Clone Default Teams
- Clone Navigation Bar Module Selection
- Clone Filters
Select the modules you want to clone the filters on

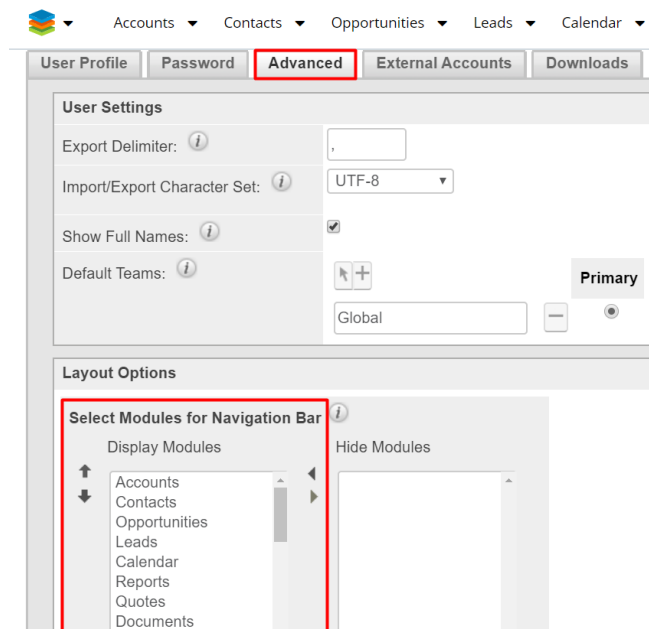
Common Profile Settings

When the clone operation is complete, a message will be displayed on the **Clone User Preference view**, a notification will be displayed on the **Notifications module**, and a notification message will appear in the right corner near the **User Menu**.

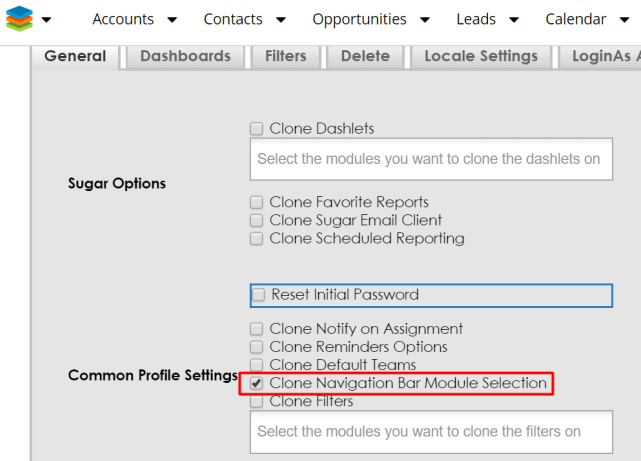
The **Destination User** should see this option cloned under the **User Profile**, the **Advanced** tab.

Clone Navigation Bar Module Selection

The **Clone Navigation Bar Module Selection** preference can be found on the **Clone User Preference view** under the **General** tab. From here the Admin user can add the same modules for navigation bar from source user to destination team(s)/user(s). The selected modules for navigation bar are set on the **User profile** record view:

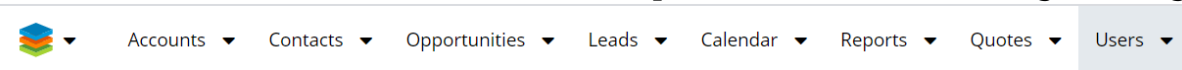


By cloning this option, all default modules in the navigation bar from the Source User will be added to the destination team(s)/user(s)/role(s) on each profile user.



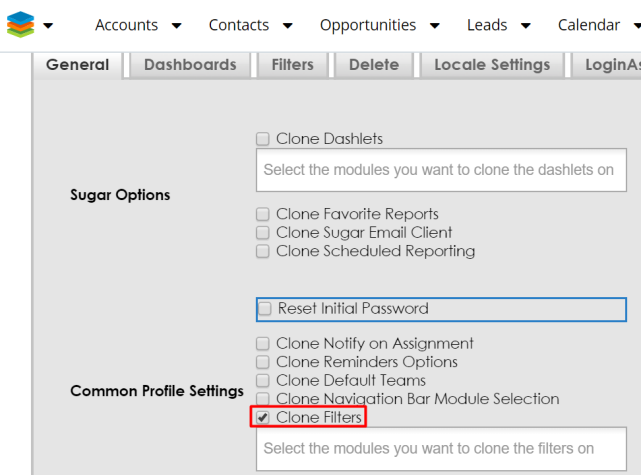
When the clone operation is complete, a message will be displayed on the **Clone User Preference view**, a notification will be displayed on the **Notifications module**, and a notification message will appear in the right corner near the **User Menu**.

The **Destination User** should see this option cloned in their Sugar navigation bar.

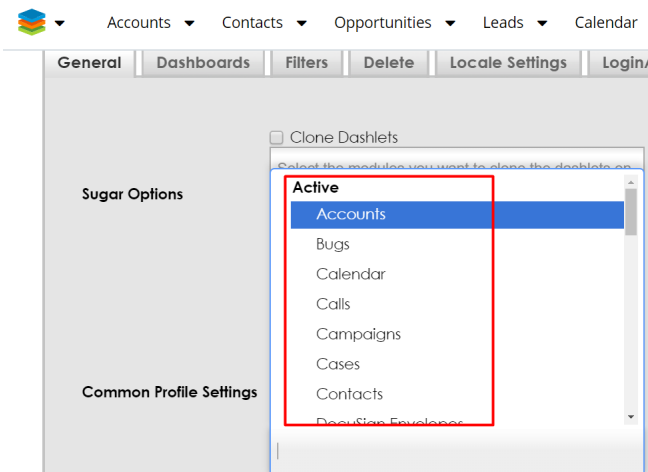


Clone Filters

The Clone Filter option can be found on the **Clone User Preference view** under the **General** tab. From here, the Admin user can add the filters from Source User to the Destination team(s)/user(s)/role(s).



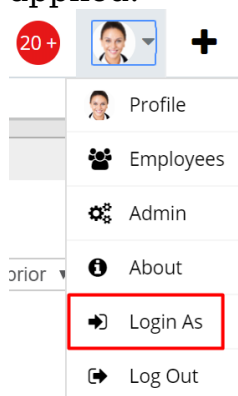
To clone filters, the Admin user must select the target module on which he wants to have the filters added.



Once the **Clone** button is pressed, all custom filters from the Source User are added to the destination team(s)/user(s)/role(s) on the selected target modules. If the Admin user does not pick any target module, then all filters from all modules will be added to the destination user(s)/team(s)/role(s).

When the clone operation is complete, a message will be displayed on the **Clone User Preference view**, a notification will be displayed on the **Notifications module**, and a notification message will appear in the right corner near the **User Menu**.

The wUserUtils **Login As** functionality can be used to login as another user (Ex: login as the user that was set as the destination), to see if the changes were applied.



A **browser refresh** may be necessary.

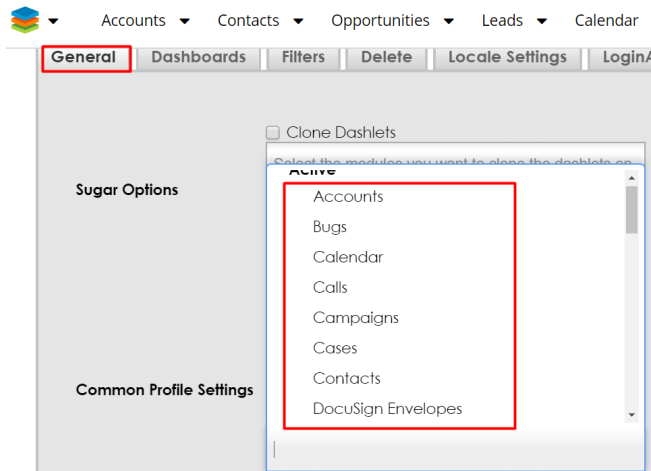
The destination user should see on their user account all the new custom filters that were selected on **Clone User Preference** for each module in List View.

wUserUtils has another option for adding filters that can be found on the **Clone User Preferences**, under the **Filters** tab. This option allows more refined

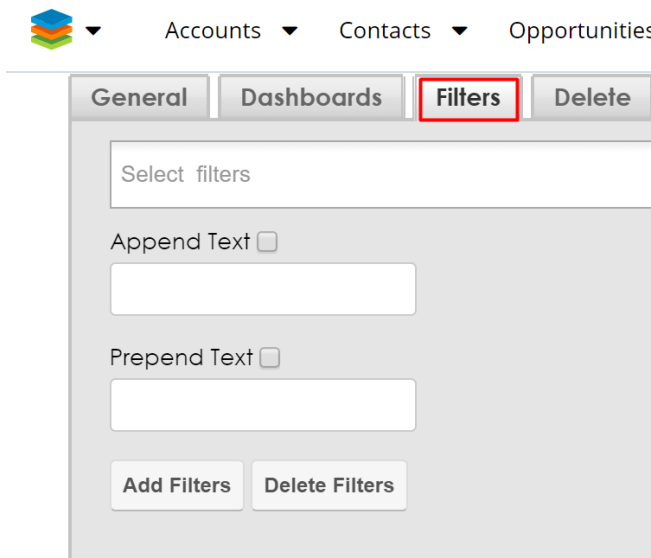
configuration.

Clone Filters vs. Add filters:

- The **Clone Filters** action allows you to select only the module, and wUserUtils will add all the custom filters available for the **Source User**, to the **Destination User** account.



- The **Add Filters** option offers the entire list of custom filters for each module. The Admin user will be able to pick a certain filter from one or multiple modules.



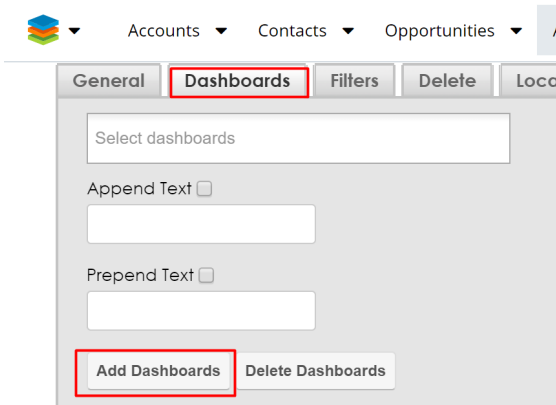
This option will be detailed below.

Dashboards Tab

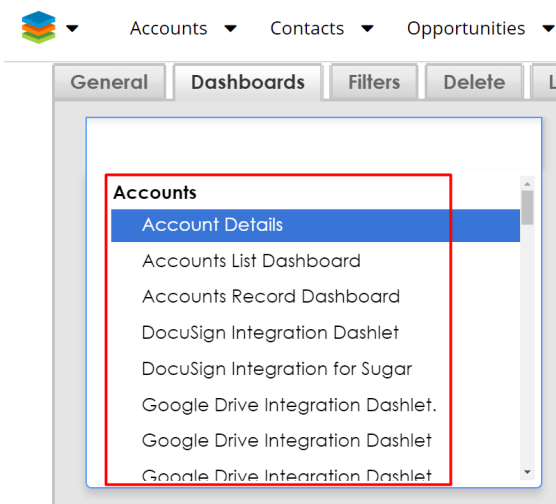
- [Add Dashboards](#)
- [Delete Dashboards](#)

Add Dashboards

The **Add Dashboards** option can be found on the **Clone User Preference view**, under the **Dashboards** tab. This option offers the entire list of custom dashboards for each module and the user will be able to pick a certain dashboard from one or multiple modules that will be added on a destination team(s) and/or user(s) and/or role(s).



The dropdown field for the **Dashboard** tab will return only the Source User's dashboards.

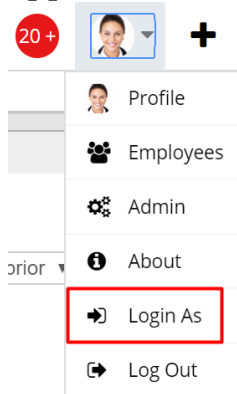


To add dashboards, the Admin user must select the target module on which he wants to have the dashboards added. Once the **Add Dashboards** button is pressed, all the selected dashboards from the **Source User** will be added to the **Destination team(s)/user(s)/role(s)**.

When the clone operation is complete, a message will be displayed on the **Clone User Preference view**, a notification will be displayed on the **Notifications module**, and a notification message will appear in the right corner near the **User Menu**.

Note: If the same dashboard is added multiple times on the **Destination user(s)/team(s)/role(s)**, it will only be displayed once. The selected dashboard will be updated every time an user performs an **Add dashboard** action.

The wUserUtils **Login As** functionality can be used to login as another user (Ex: login as the user that was set as the destination), to see if the changes were applied.



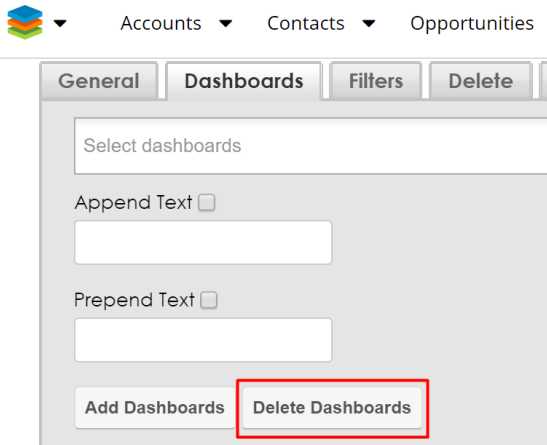
The destination user should see on his user account all the new custom dashboards on each module that was selected on Clone User Preference. Using the **Dashboard** tab to add dashlets will **append** dashboards to the user's existing dashboards.

Note: If a user already has the dashboard which is being copied, then that specific dashboard will get overwritten (not all dashboards). This is useful to apply new dashboards for users, or update modified dashboards to users.

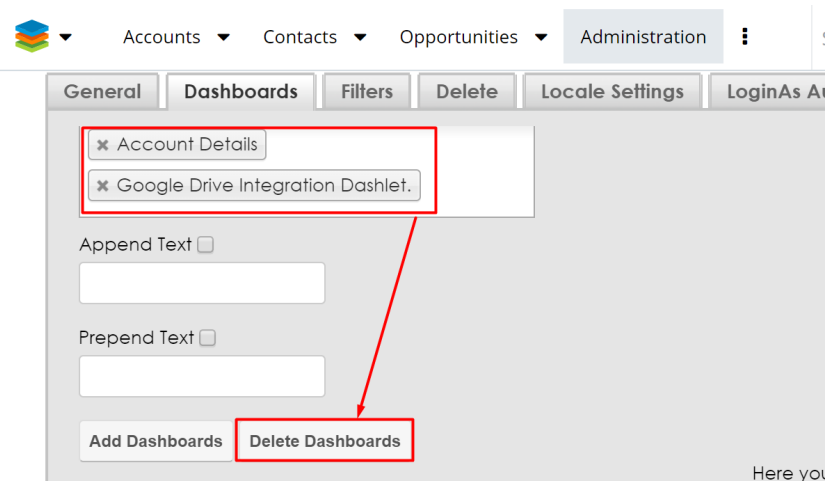
Delete Dashboards

The **Delete Dashboards** option can be found on the **Clone User Preference view** under **Dashboards** tab. This option offers the entire list of custom dashboards for each module and the Admin user will be able to pick a certain dashboard from one or multiple modules that will be deleted from a source user.

Note: The **Delete dashboards** action will perform dashboards deletion on the **Source User** and **NOT** on **Destination Team(s)/User(s)/Role(s)**!



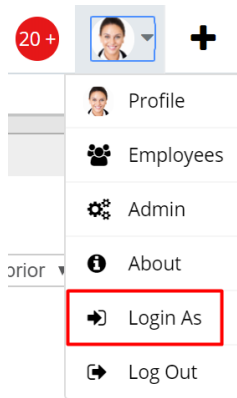
The dropdown field for the **Dashboard** tab will only delete the **Source User's** dashboards.



To delete dashboards, the Admin user must select the target module where they want to have the dashboards deleted from. Once the **Delete dashboards** button is pressed, all the selected dashboards will be deleted from the **Source User** account.

Note: If the **Source User** has multiple dashboards with the same name, then only the selected one will be deleted.

The wUserUtils **Login As** functionality can be used to login as another user (Ex: login as the user that was set as the destination), to see if the changes were applied.

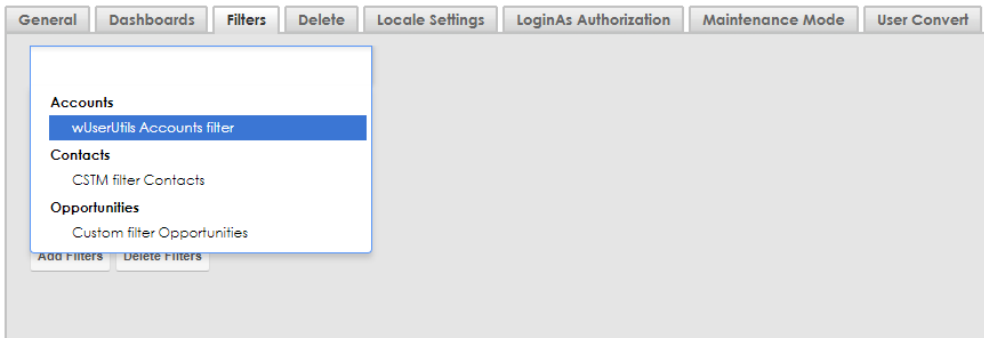


Filters Tab

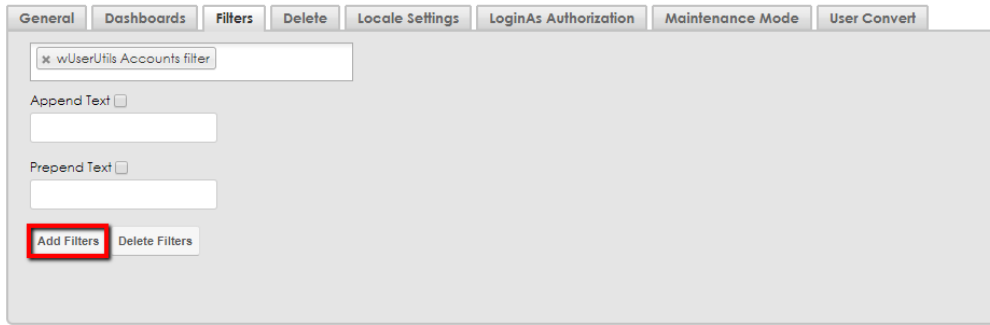
- [Add Filters](#)
- [Delete Filters](#)

Add Filters

The Add Filters option can be found on the **Clone User Preference view** under the **Filters** tab. This option offers the entire list of filters for each module and the user will be able to pick a certain filter from one or multiple modules that will be added on a destination team(s) and/or user(s) and/or role(s).

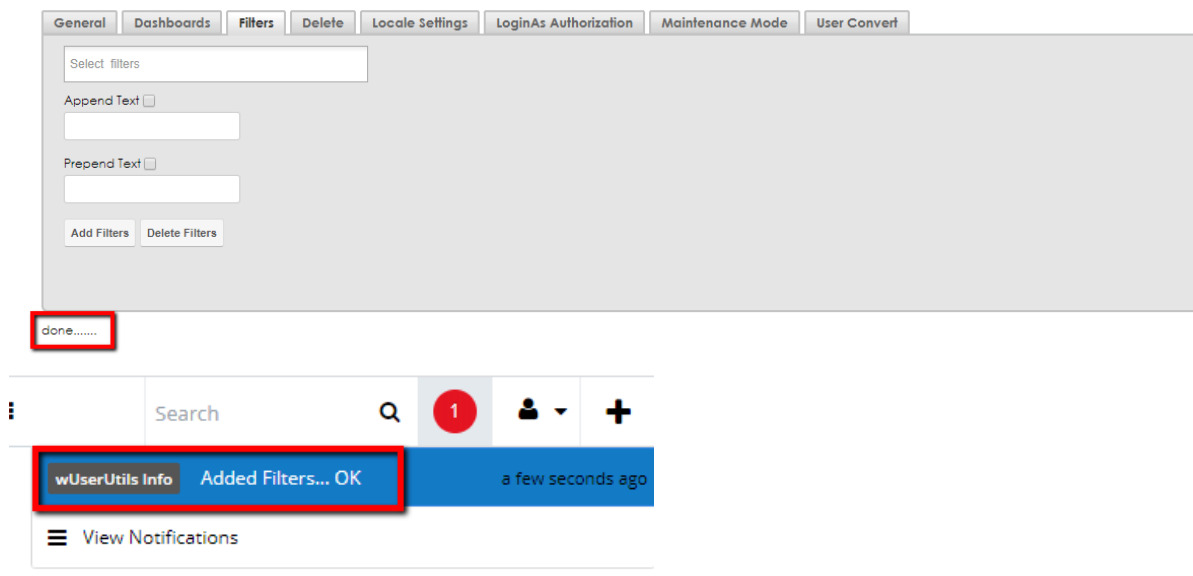


The dropdown field for the **Add filters** option will return only the source user's custom filters.

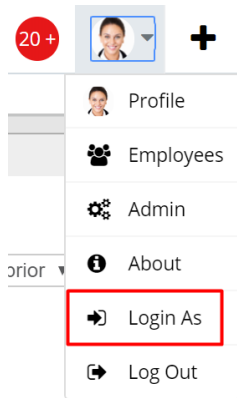


To add filters, the Admin user should select the target module on which he wants to have the filters added. Once the **Add Filters** button is pressed, all selected filters from the Source User will be added to the Destination team(s)/user(s)/role(s).

When the clone operation is complete, a message will be displayed on the **Clone User Preference view**, a notification will be displayed on the **Notifications module**, and a notification message will appear in the right corner near the **User Menu**.



The wUserUtils **Login As** functionality can be used to login as another user (Ex: login as the user that was set as the destination), to see if the changes were applied.



The Destination User should see on their user account all the new custom filters on each module in List View, that were added using the **Add Filters** option.

Note: The same filter can be added multiple times on the **Destination user(s)/team(s)/role(s)** but it will be displayed only once. This is a different behavior than the Add Dashboards (only if the filter was not updated). When the filter that already was added for a user, is updated on the **Source User** and then added again, it will be added as a new filter with different criteria.

Delete Filters

The Delete Filters option can be found on the **Clone User Preference view** under the **Filters** tab.

This option offers the entire list of filters for each module and the user will be able to pick a certain filter from one or multiple modules that will be deleted from a **Source User**.

Note: The **Delete Filters** action will perform filter deletion on the source user and not on the **Destination Team(s)/User(s)/Role(s)**!

Clone User Preferences

Full Name Search Clear [Advanced Search](#)

Run without Scheduled Job ▾

Source User **Ana Popescu** Destination Teams East West

General Dashboards **Filters** Delete Locale Settings LoginAs Authorization Maintenance Mode User Convert

✕ Custom filter Opportunities

Append Text

Prepend Text

Add Filters **Delete Filters**

The **Filters** dropdown field will only show the **Source User's** custom filters.

Clone User Preferences

Full Name Search Clear [Advanced Search](#)

Run without Scheduled Job ▾

Source User Ana Popescu Destination Teams

General Dashboards **Filters** Delete Locale Settings

Accounts

- wUserJfk Accounts filter

Contacts

- CSTM filter Contacts

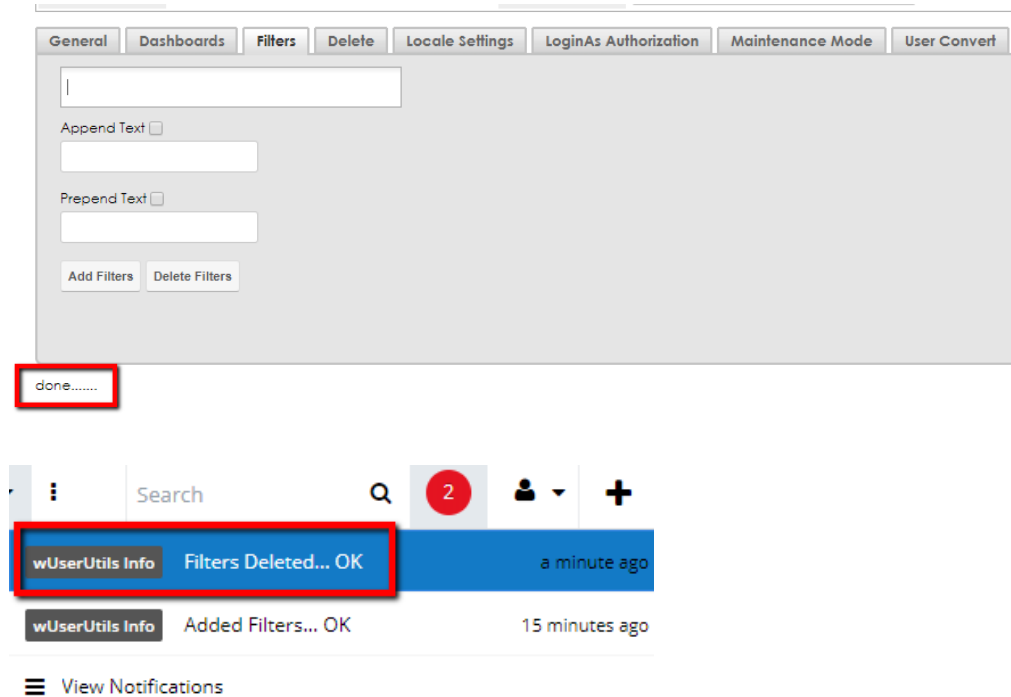
Add Filters Delete Filters

done.....

To delete filters, the user must select the target module from which he wants to have the filters deleted. Once the **Delete Filters** button is pressed, all the selected filters will be deleted from the **Source User**.

When the clone operation is complete, a message will be displayed on the **Clone User Preference view**, a notification will be displayed on the **Notifications**

module, and a notification message will appear in the right corner near the **User Menu**.

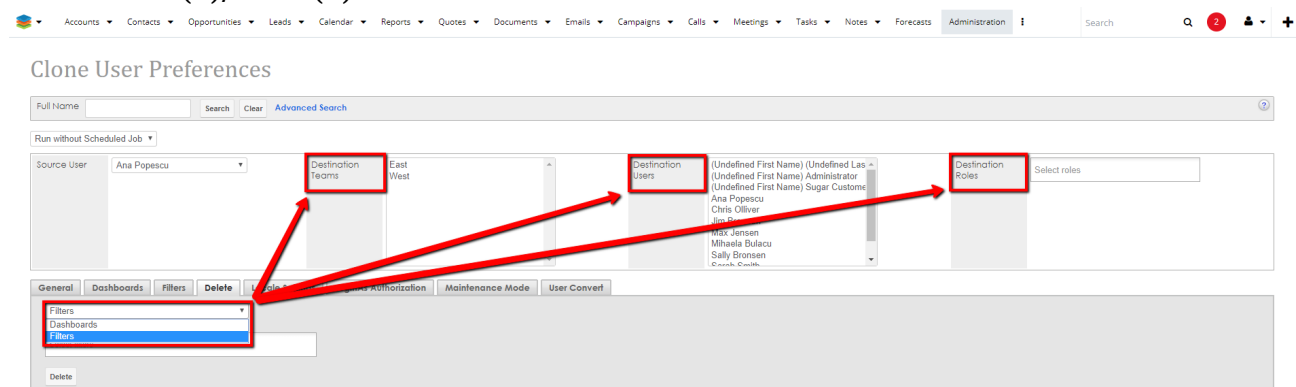


Note: If there are multiple filters with the same name, then only the selected one will be deleted.

Delete Tab

Unlike **Delete Dashboards** and **Delete Filters**, the **Delete** option from **Delete** tab will act on the **Destination Team(s)/User(s)/Role(s)**. The user needs to first select the category of deleted records: **Filters** or **Dashboards**.

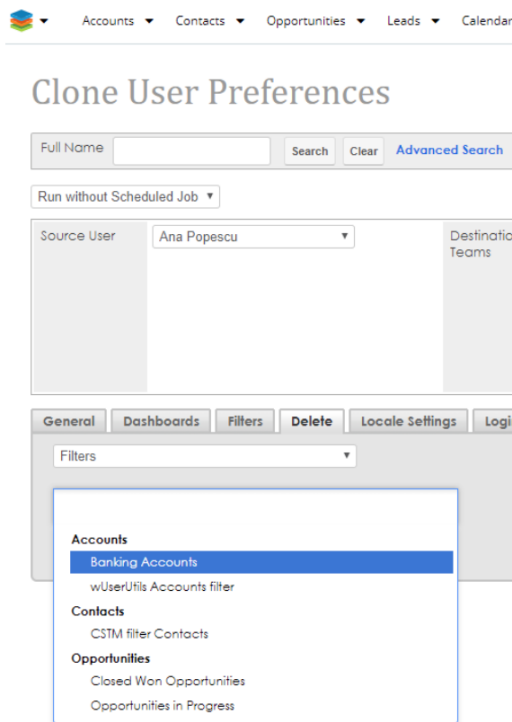
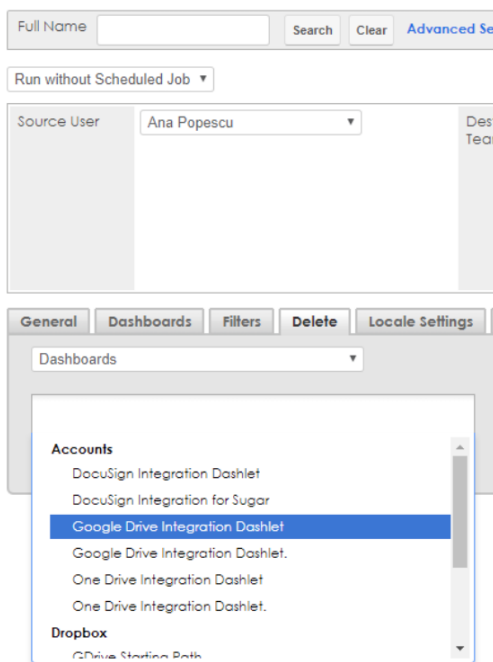
Using the **Delete** tab to delete dashboards or filters deletes the selected dashboard(s)/filter(s) from the **DESTINATION** user.



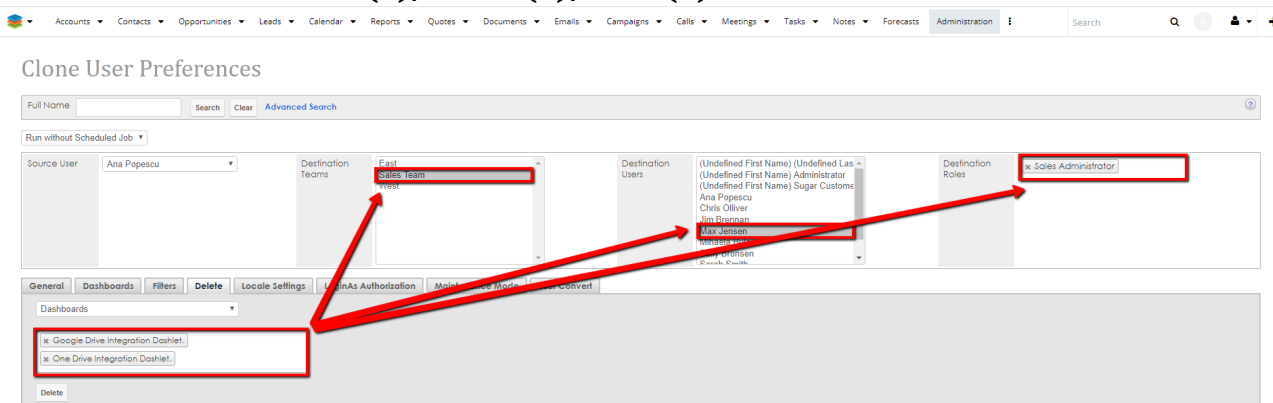
When the user will pick **Dashboards**, the dropdown will be populated with all existing Dashboards from all user accounts. Each record will be unique in the dropdown.

Same rule is applicable to **Filters**: when the user will pick the Filters option, the dropdown will be populated with all the existing **Filters** from all users. Each record will be unique in the dropdown.

Clone User Preferences

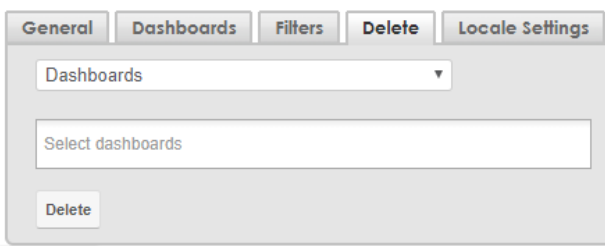


Once the **Delete** button is pressed, all the selected records will be deleted from the **Destination User(s)/Team(s)/Role(s)**.

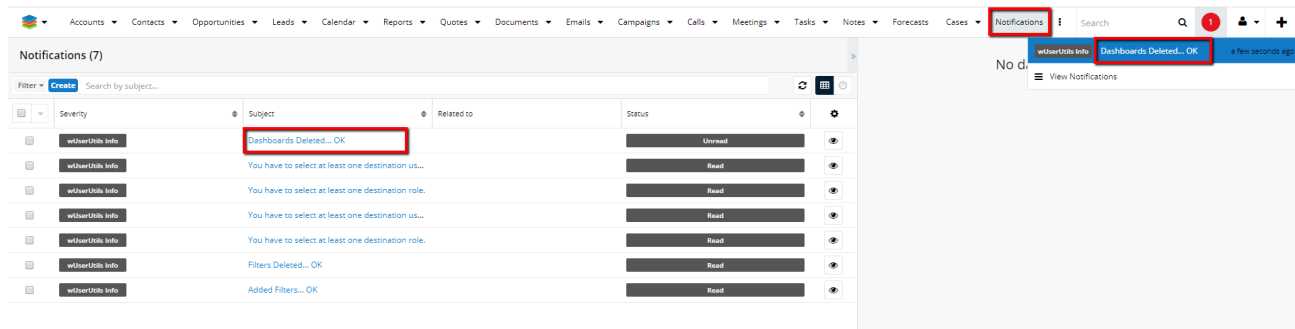


When the clone operation is complete, a message will be displayed on the **Clone User Preference view**, a notification will be displayed on the **Notifications** module, and a notification message will appear in the right corner near the **User**

Menu.



done.....



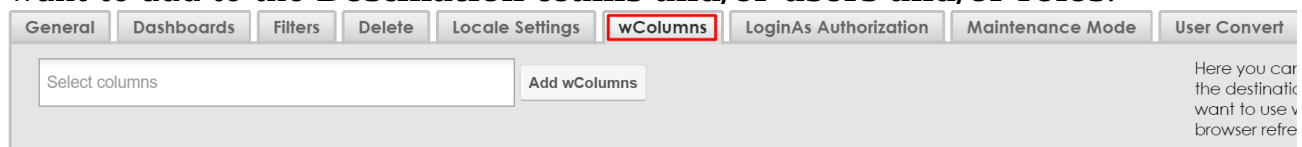
Note: If we have multiple records with the same name then ALL records having the same name will be deleted from the **Destination user(s)/team(s)/role(s)**.

The wUserUtils **LoginAs** functionality can be used to login as another user (Ex: login as the user that was set as the destination), to see if the changes were applied.

wColumns

On the **Clone User Preferences** screen is available the **wColumns tab**. This option is only available for **wColumnsSet** users.

This tab allows the Admin user to select the **wColumn** configuration that they want to add to the **Destination teams and/or users and/or roles**.



Locale Settings Tab

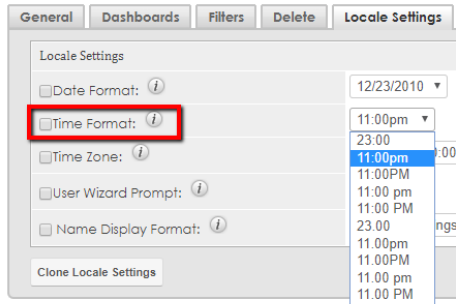
The **Locale Settings tab** appears as a new tab on Clone User Preferences page:

In the **Locale Settings** tab can be found the same user preferences that are available in the **User's Profile** page, under the **Advanced tab**.

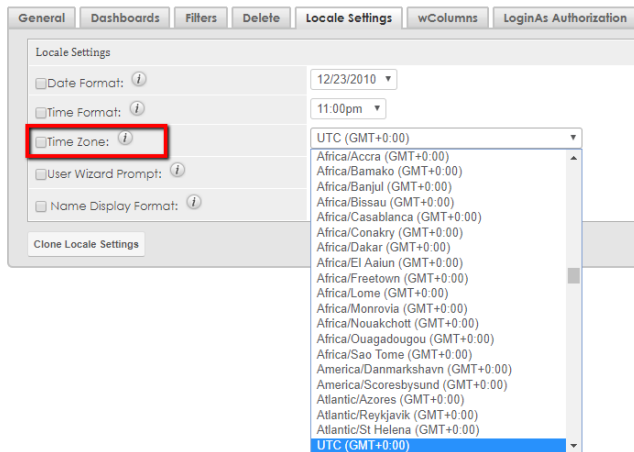
The Admin user will be able to choose which options to clone from the entire list of **Locale Settings** by ticking the checkbox in front of the option:

- **Date Format** - Will set the display format for the date stamps

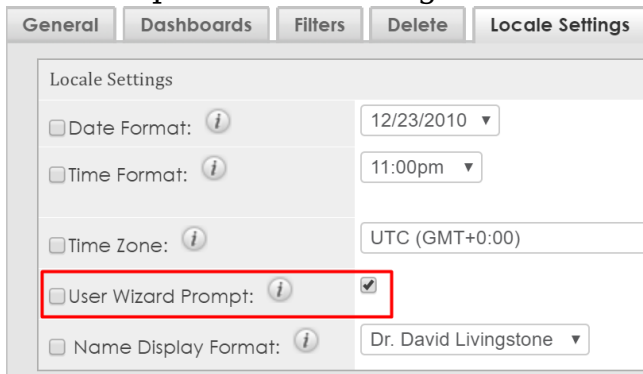
- **Time Format** - Will set the display format for time stamps



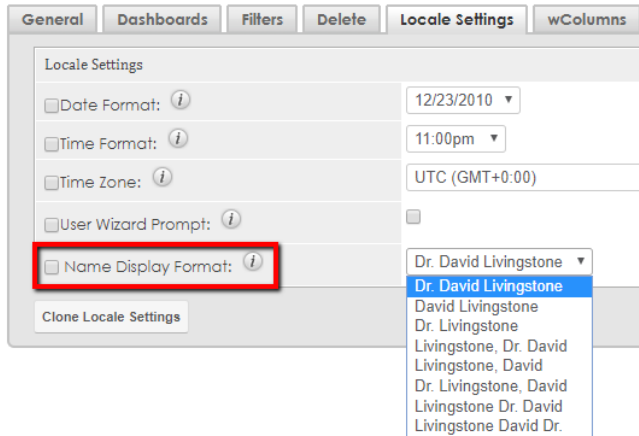
- **Time Zone** - Will set the current time zone



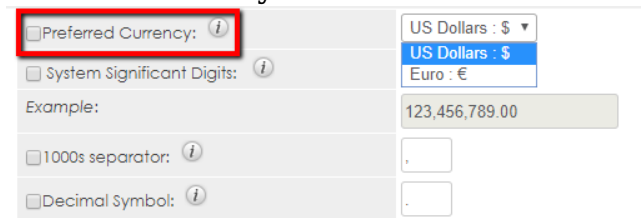
- **User Wizard Prompt** - Select to have new users go through the New User Wizard upon their first login.



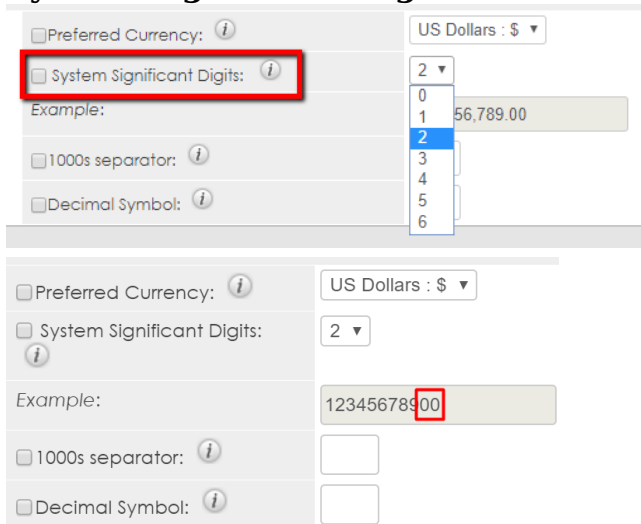
- **Name Display Format** - Set how names will be displayed.



- **Preferred Currency** - This is the currency used in both **List** and **Record View** if the **Show Preferred Currency** feature is enabled. This is also your default currency for new records.



- **System Significant Digits**



- **1000s separator** - this is a type-in field that allows the Admin user to set the character used to separate thousands ("," Or ".")

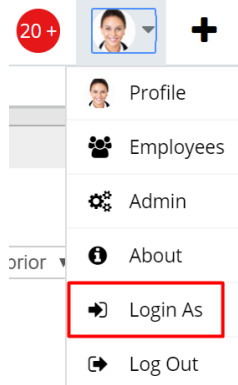
Preferred Currency: *i* US Dollars : \$ ▾
 System Significant Digits: *i* 2 ▾
 Example: 12345678900
 1000s separator: *i*
 Decimal Symbol: *i*

- **Decimal Symbol** - this is a type-in field that allows the Admin user to set the character used to separate decimal portions ("." Or ",")

Preferred Currency: *i* US Dollars : \$ ▾
 System Significant Digits: *i* 2 ▾
 Example: 12345678900
 1000s separator: *i*
 Decimal Symbol: *i*

LoginAs Authorization Tab

The **Login As** functionality is only available by default for Admin users.



In the **LoginAs Authorization tab** in **Clone Users Preferences screen**, Admin users can authorize for the **Login As functionality** other users by selecting:

- **Users:** a regular user
- **Teams:** all members of the selected team
- **Roles:** users that have the selected Role

General | Dashboards | Filters | Delete | Locale Settings | wColumns | **LoginAs Authorization** | Maintenance Mode | User Convert

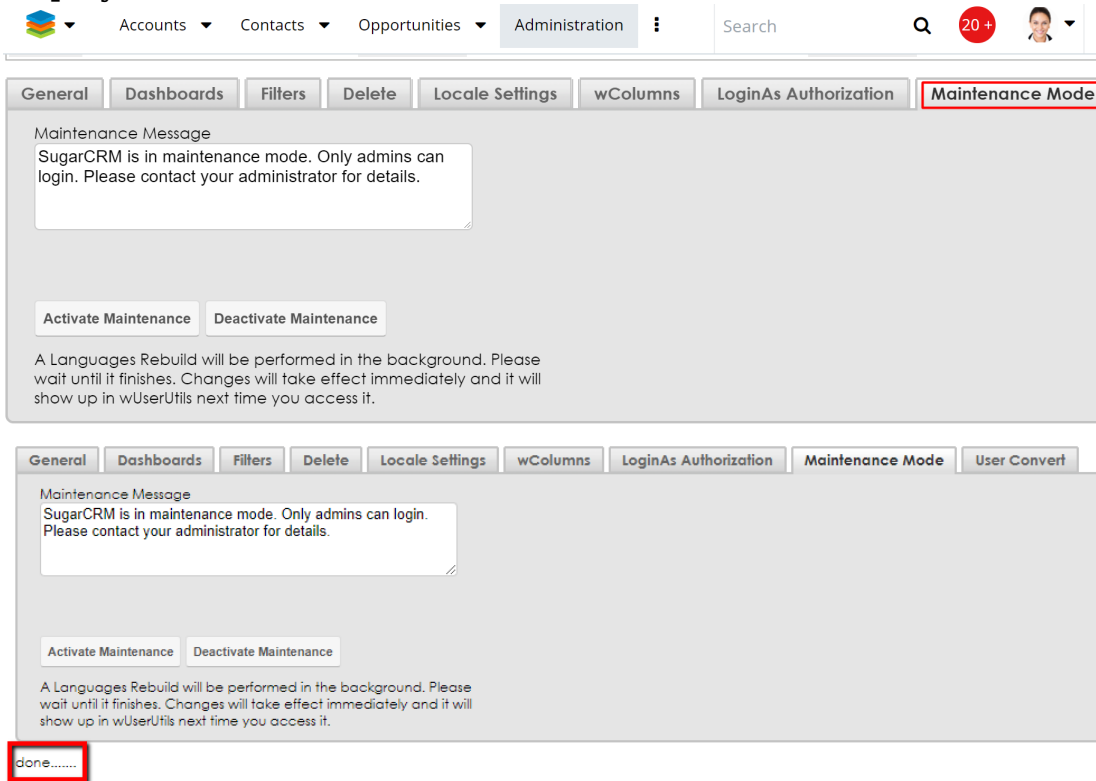
Users: Teams: Roles:

Authorize users for Login As

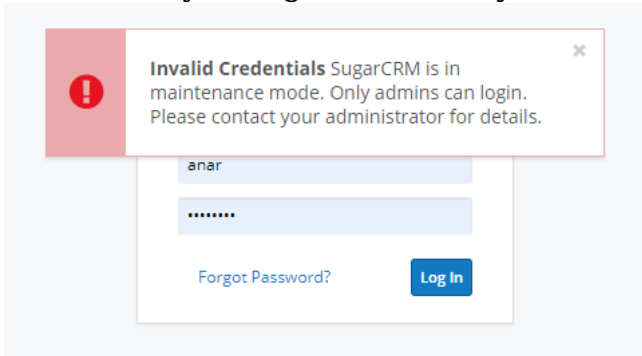
Select the **Users/Teams/Roles** and press the **Add Permissions** button to authorize other users to use this functionality.

Maintenance Mode Tab

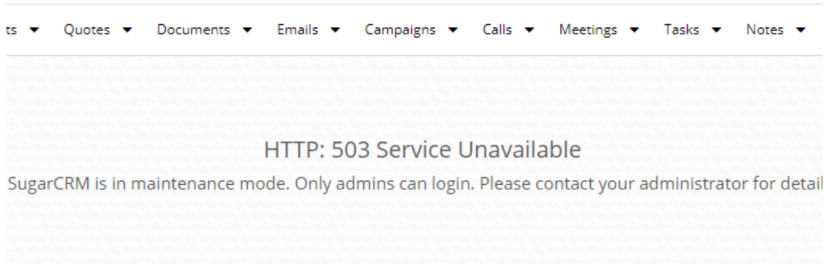
The **Admin** user can activate the maintenance mode by using the **Activate Maintenance** button. The action is completed when the "**done**" message is displayed.



In **Maintenance Mode**, only the admin user can login to the system. If a regular user will try to login into the system, a message will be displayed on the screen:



If a regular user is logged in to the system a message will be displayed on the screen:



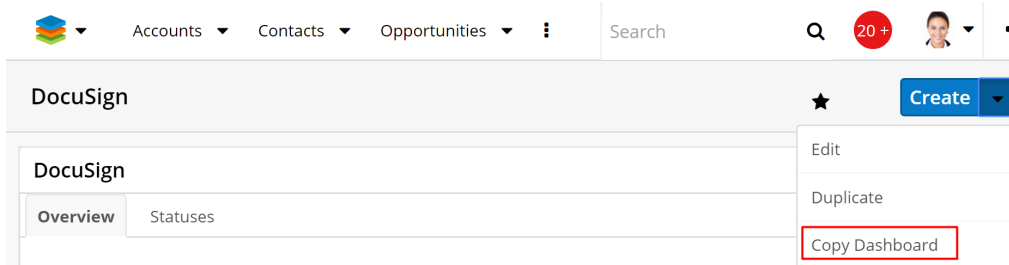
The Admin user can deactivate the maintenance mode using the **Deactivate Maintenance** button.

Copy Dashboards

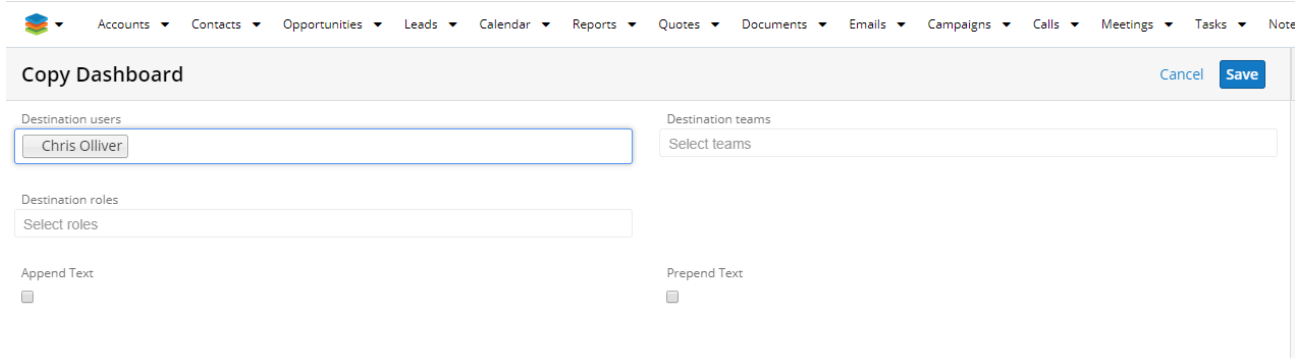
- [Copy Dashboard in Home View](#)
- [Copy Dashboard in List View](#)
- [Copy Dashboard in Record View](#)

Copy Dashboard in Home View

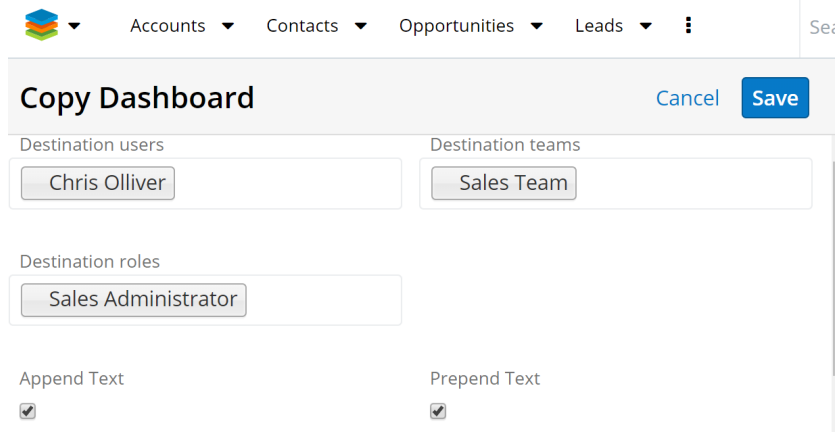
This function allows the user to **Copy Dashboards** directly from the intelligence pane by using the **Copy Dashboard** custom button available on the top right **Create action button**.



The "**Copy Dashboard**" page is structured as follows: **Destination users/teams/roles and append/prepend text:**



Select users, Select teams, Select Roles, Append Text, and Prepend Text.



Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ ⋮

Copy Dashboard Cancel Save

Destination users: Chris Olliver

Destination teams: Sales Team

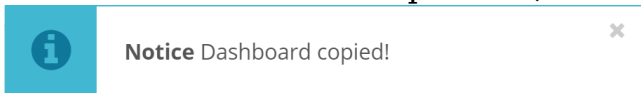
Destination roles: Sales Administrator

Append Text

Prepend Text

1. **Select users, Select teams, and Select roles.** Here, the user can select the **team and/or user(s) and/or role(s)** to which he wants to copy the dashboard. If only the **Destination Teams** will be selected, then the dashboard will be added to all users that belong to the selected team. If only the **Destination Roles** will be selected, then the dashboard will be added to all users that belong to the selected role.
2. **Append Text and Prepend Text.** Here, the user can add the text which he wants to appear in the name of dashboard at beginning or at the end.

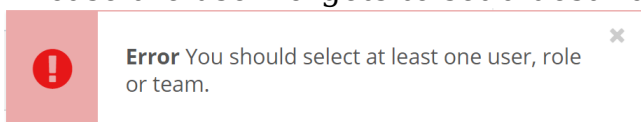
Once the **Save** button is pressed, a notification message will be raised:



Notes:

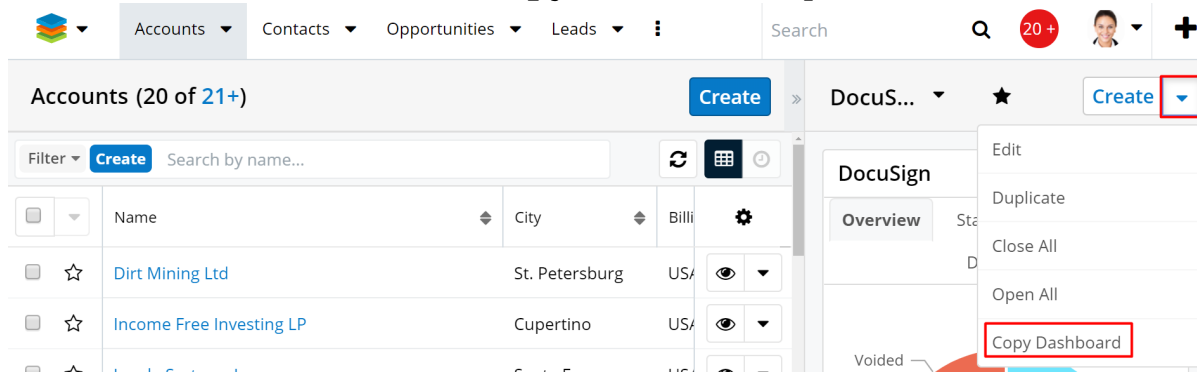
1. If only **Destination Users** will be selected, then the dashboard will be added only to the selected user(s).
2. If all three options: **Destination Teams, Destination Roles and Destination Users** are selected, then the settings will be added to all users that belong to the selected team(s) and selected user(s) and selected role(s).

In case the user forgets to set a destination team/user/role, they will be notified:



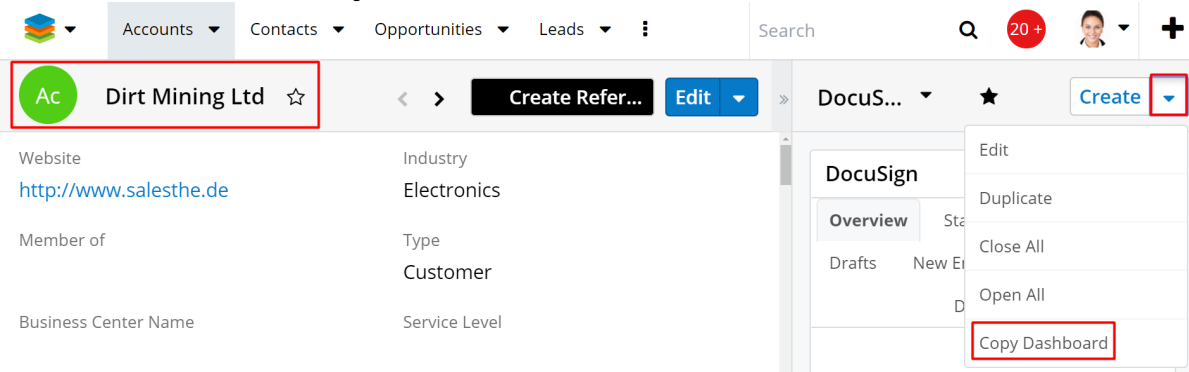
Copy Dashboard in List View

Users will be able to use the **Copy Dashboard** option in List View as well:



Copy Dashboard in Record View

The same functionality is available in **Record View**:



Notes:

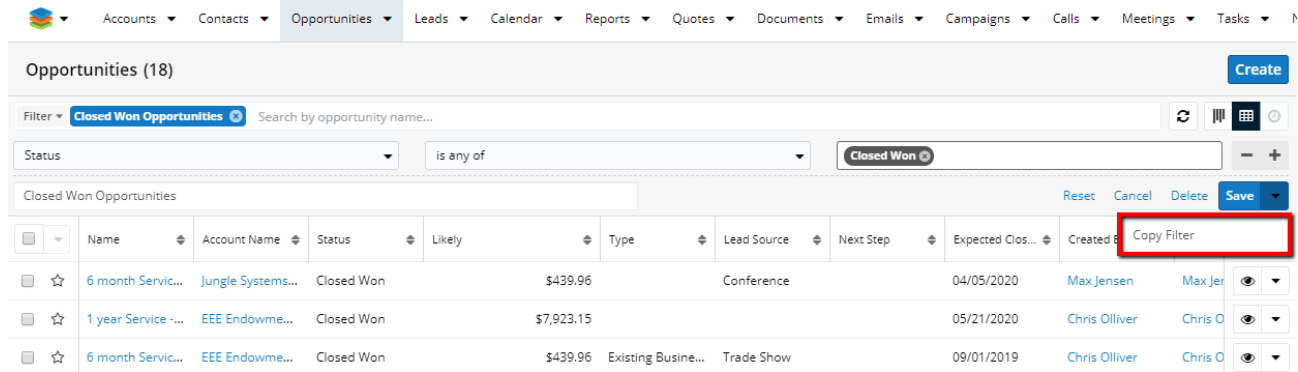
1. The same dashboard can be copied multiple times on **Destination user(s)/team(s)/role(s)** and will be displayed once (same behavior as the **Add Dashboards** functionality). The selected dashboard will be updated every time an user performs a Copy Dashboard action.
2. Any user should be able to copy dashboards, not just **Admins** users.
3. All users can copy a dashboard even if they aren't the **assigned user**.
4. **Administrators** can access all dashboards by using the **Manage Dashboards** function, even if they are not assigned to users.
5. **Administrators** can add dashboards to Favorites in order to be visible on their profile.

After that they can use the **Copy Dashboard** option in order to copy a dashboard to another user even if they aren't the **assigned user**.

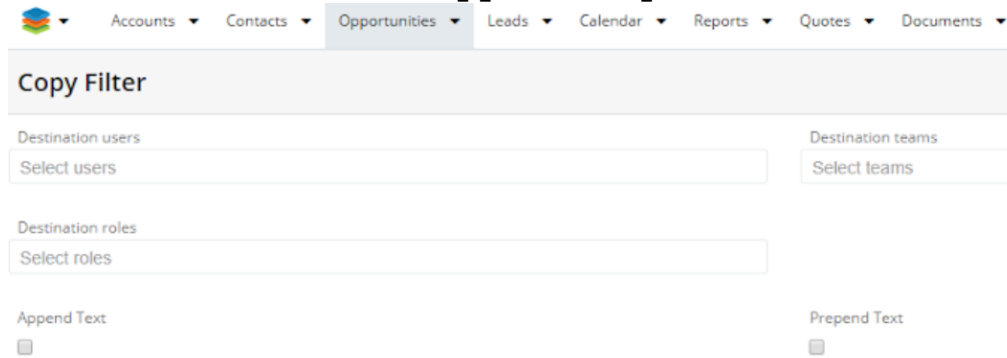
Copy Filters

Users can copy filters by using the **Copy Filters** option in **List View**. This functionality is similar to the [Copy Dashboard](#) functionality.

The **Copy Filter** button is available for custom filters when in **Edit mode**, in the **Actions** drop down menu, next to the **Save** button.



The Copy Filter page contains the following elements: **Destination users/Teams/Roles and Append/Prepend text:**



1. **Select Users, Select Teams and Select Roles.** Here the user will select the **team and/or user(s) and/or role(s)** to which he wants to copy the filter.
2. **Append Text, Prepend Text.** Here, the user can add the text which they want to appear in the name of the filter, either at the beginning or at the end of the name.

Notes: See 1 to 4 below.

1. If only the **Destination Teams** will be selected, then the filter will be added to all users that belong to the selected team.
2. If only the **Destination Roles** will be selected, then the filter will be added to all users that belong to the selected role.

3. If only the **Destination User** will be selected, then the dashboard will be added only to the selected user(s).

4. If all three options, **Destination teams**, **DestinationUsers**, and **Destination Roles** are selected then the settings will be added to all users that belong to the selected team(s) and selected user(s) and selected role(s).

Once the **Save** button is pressed, a notification message will be raised:

Name	Account Name	Status	Likely	Type	Lead Source	Next Step	Expected Clos...	Created By	User
Closed Won Opportunities									

In case the user forgets to set a destination team/user/role they will be notified:

The screenshot shows a 'Copy Filter' form with several input fields: 'Destination users' (with a 'Select users' button), 'Destination teams' (with a 'Select teams' button), and 'Destination roles' (with a 'Select roles' button). There are also checkboxes for 'Append Text' and 'Prepend Text'. A red error message box is overlaid on the form, stating: 'Error You should select at least one user, role or team.' A 'Save' button is visible in the top right corner of the form area.

Notifications

Each action performed on the **Clone User Preference page** will generate a new notification that can be accessed by clicking the notification box, near the user menu. The number displayed in the box indicates the number of unread notifications:

The screenshot shows a user notification dropdown menu. At the top, there is a search bar and a notification badge showing '20+'. Below the search bar, there are three notification items, each with a 'wUserUtils Info' icon, a subject line, and a timestamp of '2 days ago'. The first item is 'Cloning Sugar Email Client ...', the second is 'Cloning user favorites... OK', and the third is 'Cloning user favorites... OK'. The entire notification list is enclosed in a red rectangular box.

Once the user will read a notification this will be marked as Read in the **Notifications Module**:

The screenshot shows the 'Notifications' module interface. At the top, there is a navigation bar with 'Accounts', 'Contacts', 'Opportunities', and 'Notifications'. Below the navigation bar, there is a header for 'Notifications (20 of 21+)' and a search bar with a 'Filter' dropdown and a 'Create' button. The main content is a table with the following columns: 'Severity', 'Subject', 'Related to', and 'Status'. The table contains four rows of notifications. The first row has a 'wUserUtils Info' icon, the subject 'Setting initial p...', and a 'Read' status. The other three rows have 'wUserUtils Info' icons, subjects starting with 'Cloning Sugar ...', 'Cloning user fa...', and 'Cloning user fa...', and 'Unread' statuses. The 'Read' status in the first row is highlighted with a red rectangular box.

Severity	Subject	Related to	Status
wUserUtils Info	Setting initial p...		Read
wUserUtils Info	Cloning Sugar ...		Unread
wUserUtils Info	Cloning user fa...		Unread
wUserUtils Info	Cloning user fa...		Unread

Each notification will detail the reason which it is displayed under the **Description** field of the Notification in **Record View**, along with the **Assigned User** (the admin

user who performed the action):

The screenshot shows a navigation bar with 'Accounts', 'Contacts', 'Opportunities', and 'Notifications'. Below it is a breadcrumb trail: 'wUserUtils Info > Setting initial passw...'. A 'View Audit Log' button is visible. The main content area shows a log entry with the following details:

- Description: Setting initial password... OK
- Assigned to: Administrator
- Date Created: 04/22/2020 04:31pm by Administrator
- Date Modified: 04/24/2020 03:23pm by Administrator

A 'Show less' link is at the bottom.

Scheduled Job

- [Run with Scheduled Job](#)
- [Run Without Scheduled Job](#)

Run with Scheduled Job

When the user selects this option, an anonymous job will be created (the user will not be able to see it as it is programatically created) which will be queued.

All preferences will be applied on the Destination user(s)/team(s)/role(s) once the job is completed.

The Run with scheduled job option was created to prevent performance issues, such as timeouts. Once the scheduled job is created, it runs all batches at the same time. (Usually, a normal timeout request period in **Sugar** is 3 minutes, but the scheduled job function is up to 20 minutes).

The screenshot shows a navigation bar with a logo and several dropdown menus: 'Accounts', 'Contacts', 'Opportunities', and 'Administration'.

Clone User Preferences

The screenshot shows a search form with a 'Full Name' input field, 'Search', 'Clear', and 'Advanced Search' buttons. Below the search bar is a dropdown menu for 'Run without Scheduled Job' with two options: 'Run without Scheduled Job' (highlighted) and 'Run with Scheduled Job'. Other form elements include a dropdown for '(ne) Admir' and a 'Destination' field with the value 'East'.

Run Without Scheduled Job

This option is set by default and the preferences will be applied on the **Destination Team(s)/User(s)/Role(s)** only when the user will press one of the **Clone** buttons:


"Clone" (from General tab), "Add Dashboards" or "Delete Dashboards" (from Dashboards tab), "Add Filters" or "Delete Filters" (from Filters tab) or "Delete"(from Delete tab), "Clone Locale Settings" (from Locale Settings tab).

Broadcast Message

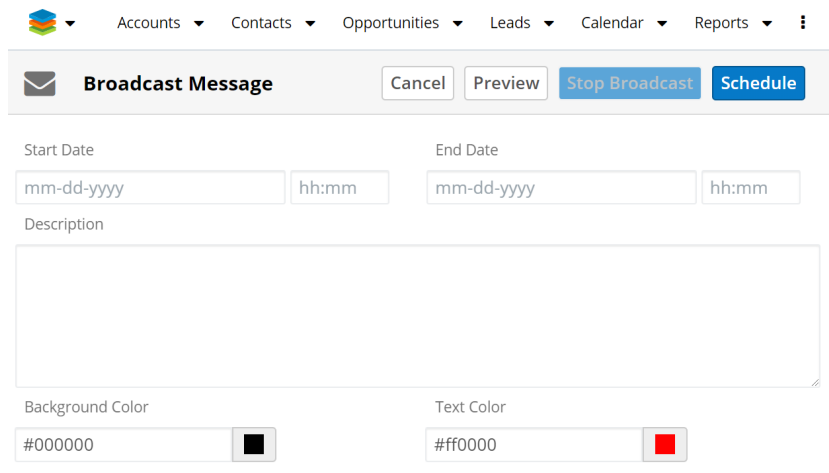
The Broadcast Message section on the Administration page allows the composition of a message that is displayed to targeted users active in the system. Only the administrator is able to set the broadcast details.

wUserUtils

Utility tool for admins to clone user preferences and dashboards

User Preference Cloning	Clone preferences and dashboards. Add dashboards to users.	Broadcast Message	Set a broadcast message
 Migrate Dashlets Type	Change type of the already saved dashlets.	Control Login Times for Users	Admin can set login times for users.

At times, when updates, configuration changes or repairs that could impact the user experience are necessary, the Sugar Administrator can inform the Sugar users about any such upcoming events. The broadcast is displayed in a section appearing above the Sugar navigation bar and is visible when a broadcast is active.



The **Start Date** and **End Date** and time fields are required and they define the interval that the broadcast message will be displayed. The date and time are erased after pressing the **Stop Broadcast** button.

Accounts Contacts Opportunities Leads

Broadcast Message Cancel Preview Stop Broadcast Schedule

Start Date mm-dd-yyyy hh:mm End Date mm-dd-yyyy hh:mm

Accounts Contacts Opportunities Leads Calendar Reports

Broadcast Message Cancel Preview Stop Broadcast Schedule

Start Date 04/24/2020 hh:mm End Date mm-dd-yyyy hh:mm

April 2020

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Text Color #ff0000

Accounts Contacts Opportunities Leads Calendar Reports

Broadcast Message Cancel Preview Stop Broadcast Schedule

Start Date 04/24/2020 hh:mm End Date mm-dd-yyyy hh:mm

Description

Background Color #000000

April 2020

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

The message that is displayed to targeted users active in the system should be added to the **Description** field.

Accounts Contacts Opportunities Leads Calendar Reports

Broadcast Message Cancel Preview Stop Broadcast Schedule

Start Date: 04/24/2020 hh:mm End Date: mm-dd-yyyy hh:mm

Description: Sugar Maintenance

The background color is set by default to black. The user is able to change the color from the color picker.

Accounts Contacts Opportunities Leads Calendar Reports

Broadcast Message Cancel Preview Stop Broadcast Schedule

Start Date: 04/24/2020 hh:mm End Date: mm-dd-yyyy hh:mm

Description: Sugar Maintenance

Background Color: #000000 [Color Picker]

Text Color: #ff0000 [Color Picker]

The text color is set by default to red. The user can change the color from the color picker.

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents

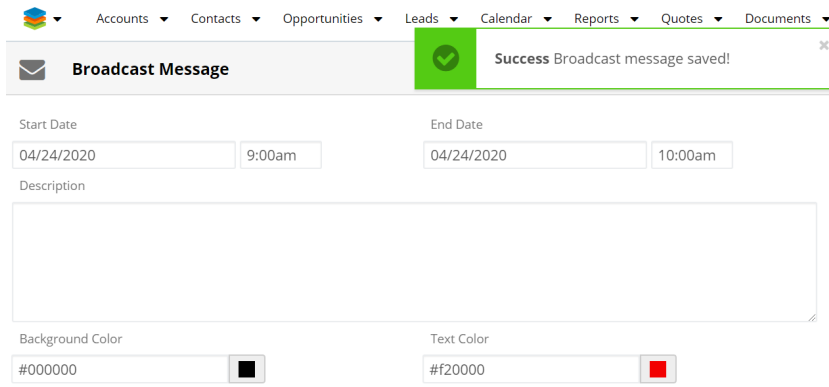
Broadcast Message Cancel Preview Stop Broadcast Schedule

Start Date: mm-dd-yyyy hh:mm End Date: mm-dd-yyyy hh:mm

Description:

Background Color: #000000 [Color Picker]

Text Color: #ff0000 [Color Picker]



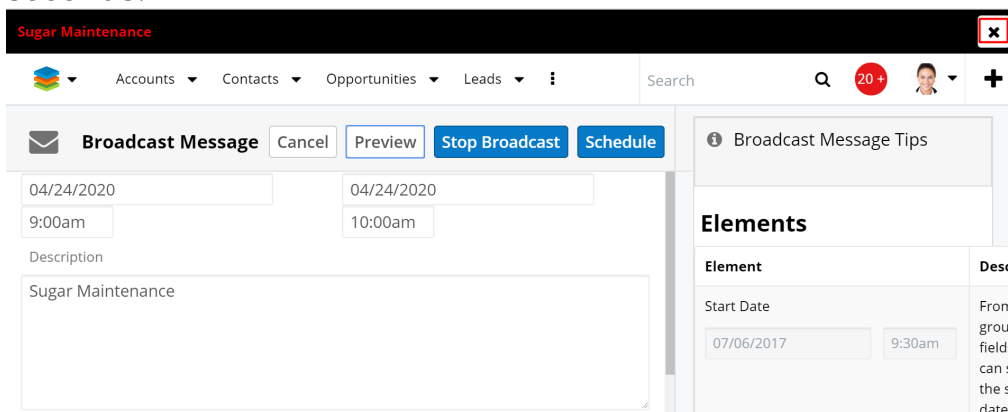
The **Preview** button allows users to check how the message is displayed before they schedule it.

The **Schedule** button will schedule the message that is displayed to the targeted users active in the system.

The scheduled message will be visible on all modules (on default and custom modules), for all users. The broadcast message is displayed below on **Accounts**, **Contacts** and **Test** modules on List View and Record View.

The **Stop Broadcast** button turns the broadcast off in a maximum of 30 seconds. The date and time are erased after pressing the **Stop Broadcast** button.

The broadcast message can be removed by pressing on the "x" button on the right side of the message. It will be displayed after refreshing the page in almost 30 seconds.



The broadcast message is automatically removed after the time range is up.

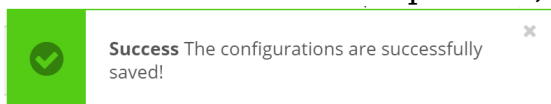
Restrict Login Hours

Admin users can control the login times of regular users from the **wUser Utils**

section of the **Administration** page, the **Restrict Login Hours** link. The option contains several fields that allow the Admin user to set up the time intervals between which regular users have access to Sugar.

- **Users:** this field allows the Admin user to select the Sugar user(s) to which this configuration applies.
- **Prevent Users Login:** this checkbox allows the Admin user to restrict the Sugar access for the selected users. This field should be checked in order to save the configuration. The selected users will be restricted to login everyday between Start Time and End Time fields values chosen and the entire weekend.
- **Start Time:** this field allows the Admin user to select the start time.
- **End Time:** this field allows the Admin user to select the end time.

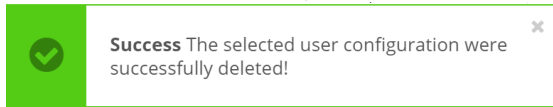
Once the **Save** button is pressed, the following popup message will be raised.



To remove the login restriction for a user (or more) it is necessary to click on "X" from "**Remove User Configuration**" column, from the **Saved Users Data** section.

User Name	Start Time	End Time	Remove User Configuration
JimBrennan	8:30am	6:30pm	X

Once the action is completed, the **Success The selected user configurations were successfully deleted!** message is raised.



User Convert Tab

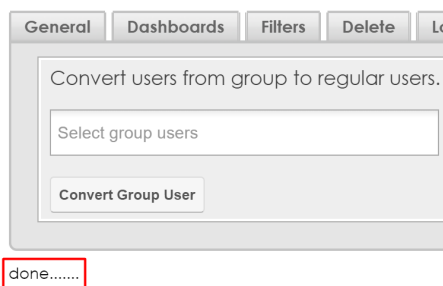
The **User Convert Tab** allows Admin Users to convert **User Groups** into **Individual Users** or **Individual Users** into **Group Users**.



- Convert Users from a Group to Regular Users

To convert users from a group to regular users, make sure to select the group and push the Convert Group User button.

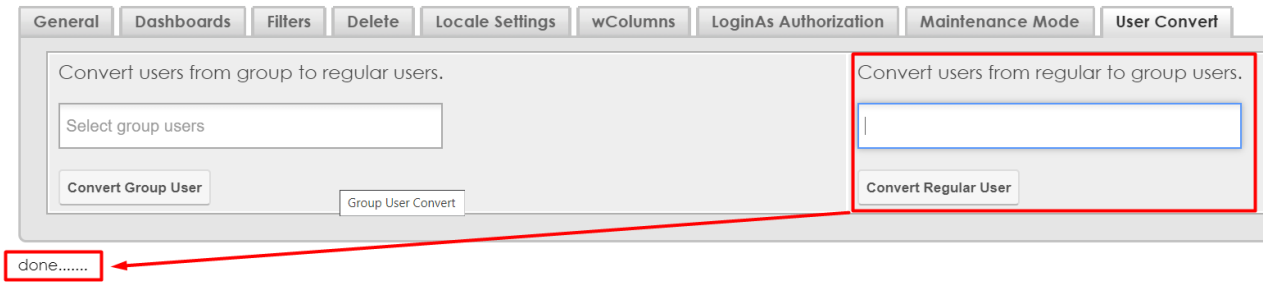
When the action is complete, the **...done** message. will be displayed.



- Convert Individual Users to Group Users

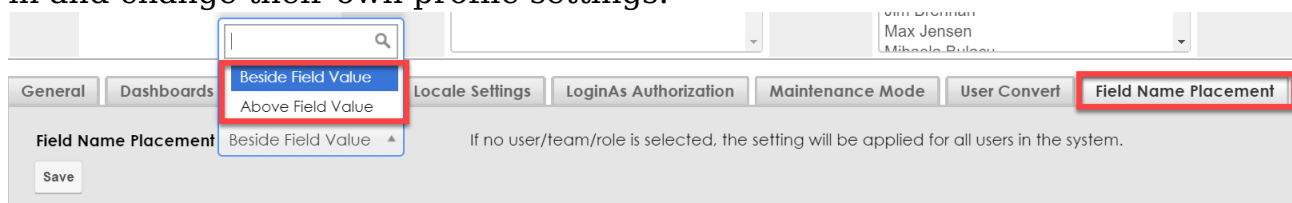
To perform this action, the Admin user must first select the Regular users and hit the Convert Regular User button.

When the action is complete, the "done" message will be displayed.



Field Name Placement

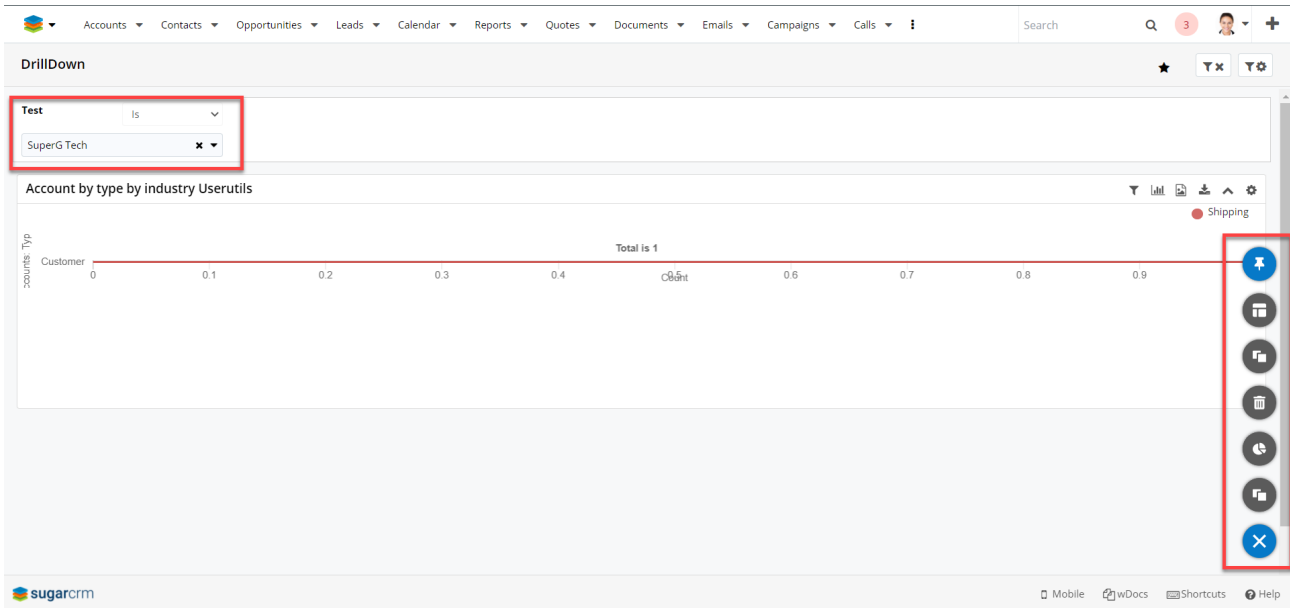
Users in Sugar 10.0 and above have the option to configure where the field name will be displayed in their Sugar instances: **Above Field Value** or **Beside Field Value**. The **Field Name Placement** setting in wUserUtils will allow an admin to apply this setting **User(s), Team(s), or Role(s)** without each user needing to log in and change their own profile settings.



Clone Runtime Filter Templates

Note: To use this feature, please ensure that you also have installed a Drill Down Reports Chart version on your Sugar instance. This functionality is only available to Drill Down Reports Chart users.

Admin users now have the option to give regular users the possibility to clone "Runtime Filters Templates" together with values or only the templates by using the "**Copy Dashboards**", "**Clone Dashlets**" and "**Add Dashboard**" actions.



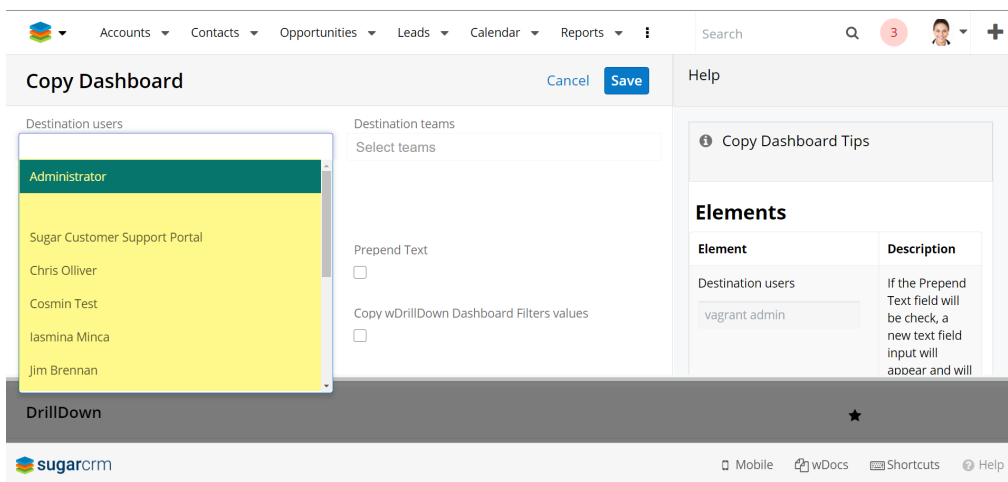
Copy Dashboards

Pressing the **Copy Dashboard** button will open a new panel with configuration options.

The screenshot shows the 'Copy Dashboard' configuration panel. It has a title bar with 'Copy Dashboard' and buttons for 'Cancel' and 'Save'. Below the title bar, there are four main sections:

- Destination users:** A text input field with the placeholder 'Select users'.
- Destination teams:** A text input field with the placeholder 'Select teams'.
- Destination roles:** A text input field with the placeholder 'Select roles'.
- Append Text:** A checkbox that is currently unchecked.
- Prepend Text:** A checkbox that is currently unchecked.
- Create Unique wDrillDown Filters:** A checkbox that is currently unchecked.
- Copy wDrillDown Dashboard Filters values:** A checkbox that is currently unchecked.

Some configuration options correspond to the ones available in the Administration panel (e.g. **Destination users/Destination teams**).



- **Destination users** - this option allows admin users to decide the regular user for whom the changes apply.

Last Modified: 2021-05-18 02:46:12