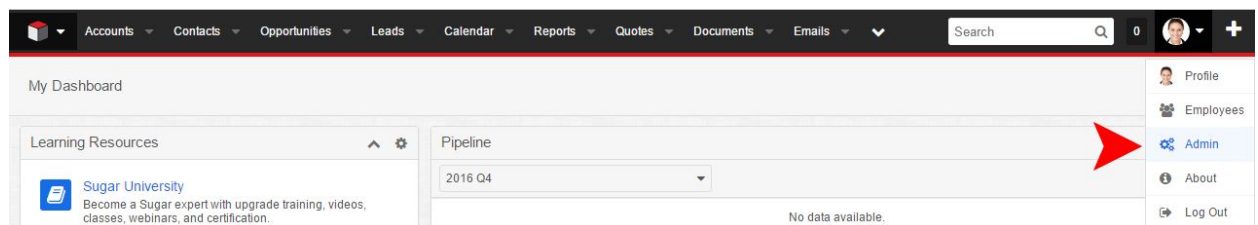


Google Sheets Business Intelligence Admin Guide

Configuring License and Validation Key

Step #1:

Go to the “Admin” module, selected from the drop-down menu as indicated in the image below.



Step #2:

In the "Admin" options, click on the “Google Sheets Business Intelligence Settings” section, then select “License & Validation.”



Step #3:

Enter provided “License Key” and “Validation Key,” then click “Save.” If you don’t have License and Validation Key, or your key has expired contact, us at support@intelestream.net.

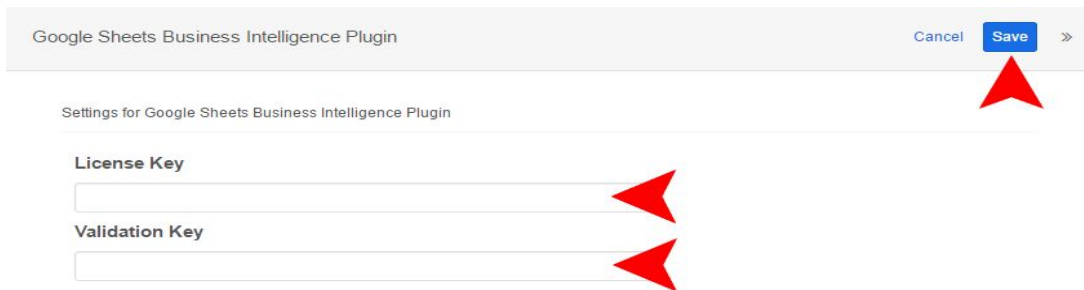
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Google Sheets Business Intelligence Plugin Cancel **Save** >>

Settings for Google Sheets Business Intelligence Plugin

License Key

Validation Key



Setting up the Google Reports Connector

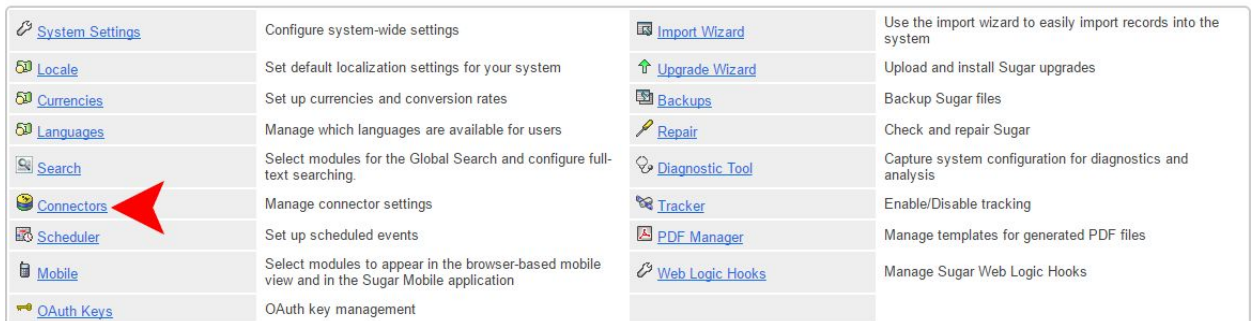
Step #1:

In “Admin” Module, go to the “System Settings” section, and then select the “Connectors” option.

System

Configure the system-wide settings according to the specifications of your organization. Users can override some of the default locale settings within their user settings page.

System Settings	Configure system-wide settings	Import Wizard	Use the import wizard to easily import records into the system
Locale	Set default localization settings for your system	Upgrade Wizard	Upload and install Sugar upgrades
Currencies	Set up currencies and conversion rates	Backups	Backup Sugar files
Languages	Manage which languages are available for users	Repair	Check and repair Sugar
Search	Select modules for the Global Search and configure full-text searching.	Diagnostic Tool	Capture system configuration for diagnostics and analysis
Connectors	Manage connector settings	Tracker	Enable/Disable tracking
Scheduler	Set up scheduled events	PDF Manager	Manage templates for generated PDF files
Mobile	Select modules to appear in the browser-based mobile view and in the Sugar Mobile application	Web Logic Hooks	Manage Sugar Web Logic Hooks
OAuth Keys	OAuth key management		



Step #2:

Click on “Set Connector Properties” icon.

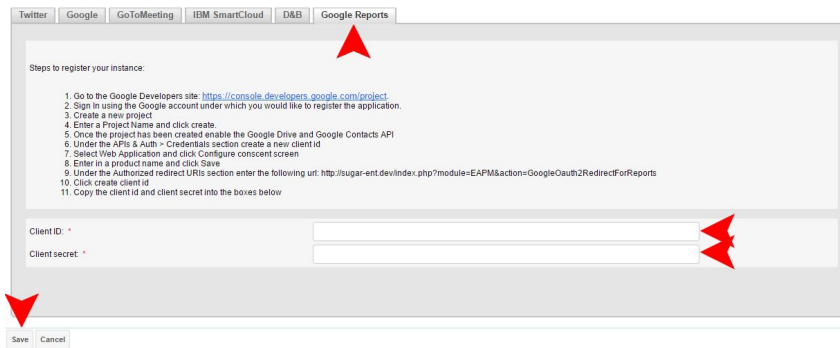
 Set Connector Properties Configure the properties for each connector, including client ID and API keys.	 Map Connector Fields Map connector fields to module fields in order to determine what connector data can be viewed and merged into the module records.
 Enable Connectors Select which modules are enabled for each connector.	 Manage Connector Search Select the connector fields to use to search for data for each module.



Step #3:

Select “Google Reports” tab, and then follow the step-by-step instructions. After you have created your “Google Project,” copy the provided “Client ID” and “Client Secret” codes into their respective fields, then click “Save.”

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Setting up the Scheduler

Step #1:

In “Admin” Module, go to the “System Settings” section, and then select the “Scheduler” option.

System

Configure the system-wide settings according to the specifications of your organization. Users can override some of the default locale settings within their user settings page.

System Settings	Configure system-wide settings	Import Wizard	Use the import wizard to easily import records into the system
Locale	Set default localization settings for your system	Upgrade Wizard	Upload and install Sugar upgrades
Currencies	Set up currencies and conversion rates	Backups	Backup Sugar files
Languages	Manage which languages are available for users	Repair	Check and repair Sugar
Search	Select modules for the Global Search and configure full-text searching.	Diagnostic Tool	Capture system configuration for diagnostics and analysis
Connectors	Manage connector settings	Tracker	Enable/Disable tracking
Scheduler	Set up scheduled events	PDF Manager	Manage templates for generated PDF files
Mobile	Select modules to appear in the browser-based mobile view and in the Sugar Mobile application	Web Logic Hooks	Manage Sugar Web Logic Hooks
OAuth Keys	OAuth key management		

Step #2:

Select the “Export SugarCRM reports to Google Sheets” task.

Scheduler	Interval	Range	Status
Export SugarCRM reports to Google Sheets	On the hour; 03:00am	01/01/2016 01:00am - perpetual	Active
Elasticsearch Queue Scheduler	As often as possible.	01/01/2001 01:00am - 01/01/2038 12:59am	Active
Publish approved articles & Expire KB Articles.	On the hour; 05:00am	01/01/2005 11:30am - 01/01/2031 12:59am	Active
Process Author Scheduled Job	As often as possible.	01/01/2015 02:45pm - 01/01/2041 12:59am	Active

Step #3:

Click on “Edit,” then modify interval to suit your needs. After you are done, click “Save”

NOTE: Setting all interval fields to * will cause job to be run as often as possible. This can cause serious performance issues if system is under heavy load! To avoid this problem, we recommend limiting exports to once or twice per day.

Job Name:	Export SugarCRM reports to Google Sheets	Status:	Active
Date & Time Start:	01/01/2016 01:00am	Active From:	Always
Date & Time End:		Active To:	Always
Last Successful Run:	Never	Interval:	On the hour, 03:00am
Execute If Missed:	<input checked="" type="checkbox"/>	Job:	function::export_reports_to_google_sheets_job
Date Created:	10/27/2016 03:18pm by [User]	Date Modified:	10/28/2016 10:39am by [User]

Job Log

Job Name	Job Status	Execute Time	Date Modified
No data			

Job Name: * Status:

Job:

Advanced Options:

Interval: *

min	hrs	date	mo	day
<input type="text" value="0"/>	<input type="text" value="3"/>	<input type="text" value="*"/>	<input type="text" value="*"/>	<input type="text" value="*"/>

The above uses standard crontab notation.

Advanced Options

Execute If Missed:

Date & Time Start: * :

Date & Time End: : :

Active From:

Active To:

User Management

This option allows you to set up user to receive reports directly into their Google Drive.

Step #1:

In “Admin” Module, go to the “System Settings” section, and then select the “Team Management” option.

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Users

Create, edit, activate and deactivate users in Sugar. Create and manage teams and roles, including module- and field-level access.

 User Management	Manage user accounts and passwords	 Role Management	Manage role membership and properties
 Team Management	Manage team membership and properties	 Password Management	Manage password requirements and expiration

Step #2:

Select the “Google Sheets Business Intelligence” team option.

Team Name	Description
 GoogleSheetsBusinessIntelligence	Team that include users to whose Google accounts reports will be saved.
 West	This is the team for the West
 East	This is the team for the East

Step #3:

Click the “Select” button. From here, you will be presented with a list of users. Selected users will receive Reports to their Google Drive

Name	User Name	Membership	Email	Phone
No data				

Step #4:

After you have selected users, double check to make sure that their “Membership” type is “**Member.**” Users who do not have the correct membership type will not be able to receive reports

NOTE: Selected users need to have access to Reports module in order for this process to work.

Edit ▾

(1 of 11)

Team Name: GoogleSheetsBusinessIntelligence

Description: Team that include users to whose Google accounts reports will be saved.

Users

Select (1 - 5 of 6)

Name	User Name	Membership	Email	Phone
Chris Olliver	chris	Member	chris@example.com	unlink
Jim Brennan	jim	Member	jim@example.com	unlink
Max Jensen	max	Member	tom@example.com	unlink
Sally Bronsen	sally	Member	sally@example.com	unlink
Sarah Smith	sarah	Member	sarah@example.com	unlink

Final Step

For these reports to export correctly from SugarCRM, they require a special naming convention. This is accomplished by adding the prefix "EXR2GD" to the report title.

For example, if you have report with name "Account List," it will need to be renamed to "EXR2GD Account List" for the plugin to properly export it.