Implementing Users, Teams and Roles, v6.0

Lab #1: Implementing Users

Goal Review user types, create a new user

Scenario Your company has just hired a new employee. Her name is Sarah Boyd, and she will join the new Engineering department as the Engineering VP.

Jason Blue, your systems administrator, will be creating Sarah's user account for your Sugar Enterprise server.

Outcome Sarah's user account is created, and Sarah can login successfully and create a Lead record.

Time 15 minutes

Instructions

Task 1: In this task you are **Jason Blue**, the system administrator. You will review the different types of users that exist.

Step	Action
1	**Login** as Jason Blue, who is an administrator. **Username = *jason*** **Password = *jason***
2	Click the **Admin** system link to access the **Administration** home page.
3	Go to the **Users** section. Click the **User Management** link to access the Users list view.
4	Observe the **Status** column. **Question 1.1:** Which usernames have no status indicated? ____
5	Observe the **System Administrator** column. **Question 1.2:** Which usernames have administrator privileges? ____

Task 2: In this task you are **Jason Blue**, the system administrator. You will create a new user, Sarah Boyd.

Step	Action
1	**Login** as Jason Blue, who is an administrator. **Username = *jason*** **Password = *jason***
2	Click the **Admin** system link to access the **Administration** home page.
3	Go to the **Users** section. Click the **User Management** link to access the Users list view.
4	Click the **Create User** action on the **Users** module tab hover menu.
5	On the **Users** page, enter the appropriate information to create Sarah Boyd as a new user: In the **User Profile** panel: **Username:** sarah **First Name:** Sarah **Status:** Active **Last Name:** Boyd **Access Type:** Regular User In the **Employee Information** panel: **Employee Status:** Active **Title:** Engineering VP **Department:** Engineering **Reports to:** John Narcom **Question 1.3:** What is John Narcom's username? ____ In the **Email Settings** panel: **Email Address: *sarah.boyd@company.crm*** Select the **Primary** Radio Button In the **Password** tab: **New Password:** sarah **Confirm Password:** sarah
6	Click **Save** button.

7	Find Sarah Boyd's record in the Users list. Click on Sarah's name to drill down on her record. Click the **Access** tab and scroll down to the **My Teams** sub-panel. Observe the **Teams** to which Sarah belongs. **Question 1.4:** Which teams does Sarah have membership to? ______________________________________
8	**Logout** as Jason Blue.

Task 3: In this task you are **Sarah Boyd**, the Engineering VP. You will login as Sarah Boyd and create a Lead.

Step	Action
1	**Login** as Sarah Boyd. **Username = *sarah*** **Password = *sarah***
2	Click **Next** through the New User Wizard.
3	Click **Finish** on the final page of the wizard to display Sarah's **Home** page.
3	Click the **Create Lead** action in the **Lead** module tab hover menu.
4	From the **Leads** page, enter the appropriate information to create a new lead. **First Name:** Clark **Last Name:** Kent **Team:** Sarah Boyd **Assigned To:** sarah
5	Click the **Save** button.

Solutions #1: Implementing Users

Answer 1.1 Which usernames have no status indicated?

Campaign, Inbound Sales, SugarCRM, and Support Email boxes

Answer 1.2 Which usernames have administrator privileges?

admin, jason

Answer 1.3 What is John Narcom's username?

john

Answer 1.4 Which teams does Sarah have membership to?

Sarah Boyd, Global

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Lab #2: Implementing Teams

Goal Review team memberships, create a new team, add users to a team, post a team notice.

Scenario Now that Sarah Boyd is on board as a new hire, the Engineering team needs to be created for her. The sales managers at the company will also have visibility to the Engineering team's records. In addition, the Engineering team is planning an off-site for Friday, and the team needs to be notified from within Sugar.

Outcome The Engineering team is created. Sarah Boyd, her manager, and the sales managers are members of the team. A team notice is posted and visible to members of the Engineering team from within Sugar.

Time 15 minutes

Instructions

Task 1: In this task you are **Jason Blue**, the system administrator. You will review the types of team memberships, along with John Narcom, the VP of Sales.

Step	Action
1	**Login** as Jason Blue, who is an administrator. **Username =** ***jason*** **Password =** ***jason***
2	Click the **Admin** system link to access the **Administration** home page.
3	Go to the **Users** section. Click the **User Management** link to access the Users list view.
4	Locate **Sarah Boyd** in the Users list view, and click on her name.
5	While viewing Sarah Boyd's detail view, scroll down until you can see the **My Teams** sub-panel. Observe the **Teams** to which Sarah belongs.
6	Click on **Sarah Boyd**, which is the private team for Sarah Boyd.

7	Observe the **Membership** column in the Users sub-panel. **Question 2.1:** What membership type is Sarah Boyd for the Sarah Boyd team? ____ **Question 2.2:** What membership type is John Narcom for the Sarah Boyd team? ____
8	**Logout** as Jason Blue.
9	**Login** as John Narcom. **Username = *john*** **Password = *john***
10	Proceed through the New User Wizard pages, and click **Finish** on the last page of the wizard to display John's **Home** page.
11	Click the **Leads** module tab.
12	**Search** for the "Clark Kent" lead record. **Name:** Clark Kent
13	Click on the "**Clark Kent**" lead record. **Observe** that John can view the "Clark Kent" lead record, even though it is assigned to Sarah's private team. **Question 2.3:** Why can John Narcom view a record that is assigned to Sarah Boyd's private team? ____
14	**Logout** as John Narcom.

Task 2: In this task you are Jason Blue, the system administrator. You will create the Engineering team and add users to the engineering team.

Step	Action
1	**Login** as Jason Blue, who is an administrator. **Username = *jason*** **Password = *jason***
2	Click the **Admin** system link to access the **Administration** home page.
3	Go to the **Users** section. Click the **Team Management** link to access the Teams list view.
4	Click the **Create Team** action on the **Teams** module tab hover menu.
5	Enter the appropriate information to create **Engineering** as a new team: **Team Name:** Engineering **Description:** Engineering Department Users
6	Click the **Save** button.
8	In the **Users** sub-panel, click the **Select** button, then select Sarah Boyd in the pop-up window.
9	Observe the **Membership** type for Sarah. **Question 2.4:** Which membership type does Sarah have for the Engineering team? ____
10	Observe the **Membership** type for John Narcom. **Question 2.5:** Which membership type does John have for the Engineering team? ____

11	Click the **Select** button in the Users sub-panel to add additional users to the Engineering team. Choose the following users: • **Barbara Boxley** • **Derrick Toupin** • **John Narcom** • **Lawrence Heier** • **Rocio Watchman** • **Sally Salters** **Question 2.6:** Which membership type does John have for the Engineering team, after adding him explicitly? ____
12	**Logout** as Jason Blue.

Task 3: In this task you are **Jason Blue**, the system administrator. You will set a Team Notice for the Engineering team, on behalf of Sarah Boyd, the Engineering VP.

Step	Action
1	**Login** as Jason Blue, who is an administrator. **Username = *jason*** **Password = *jason***
2	Click the **Admin** system link to access the **Administration** home page.
3	Go to the **Users** section. Click the **Team Management** link to access the Teams list view.
4	Click the **Create Team Notice** action on the **Teams** module tab hover menu.
5	Enter the appropriate information to create a Team Notice: **Date Start:** today's date **Date End:** end of next week **Team:** Engineering Team **Status:** Visible **Title:** Notice for Engineering **Description:** We are having a team meeting off-site next Friday! **URL Title:** Directions To Off-Site **URL:** http://maps.google.com

	Question 2.7: What are the possible options for a Team Notice status? ____
7	Click the **Save** button.
8	**Logout** as Jason Blue.
9	**Login** as Sarah Boyd. **Username = *sarah*** **Password = *sarah***
10	From the **Home page**, review your new team notice in the **Team Notices** dashlet. You may need to add this dashlet to your home page, then refresh the page, if the dashlet is not already present.
11	**Logout** as Sarah Boyd.

Solutions #2: Implementing Teams

Answer 2.1 What membership type is Sarah Boyd for the Sarah Boyd team?

Member

Answer 2.2 What membership type is John Narcom for the Sarah Boydteam?

Member Reports-to

Answer 2.3 Why can John Narcom view a record that is assigned to Sarah Boyd's private team?

John is Sarah's manager, and has Member Reports-to membership to the Sarah Boyd private team.

Answer 2.4 Which membership type does Sarah have for the Engineering team?

Member

Answer 2.5 Which membership type does John have for the Engineering team?

Member Reports-to

Answer 2.6 Which membership type does John have for the Engineering team, after adding him explicitly?

Member

Answer 2.7 What are the possible options for a Team Notice status?

Visible and Hidden

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Lab #3: Implementing Roles

Goal Create a role and add users to the role.

Scenario Now that the Engineering team is created, there are certain access controls that need to be implemented for the Engineering VP. Sarah Boyd is allowed to see all Contacts, Leads, Targets, Bugs, and Cases in the system. Sarah is not allowed to see any Forecasts, Opportunities, or Quotes.

Outcome An Engineering Role is created. Sarah Boyd is added to the Engineering Role. Three modules will be hidden from her. She will be able to bypass team security in six other modules.

Time 15 minutes.

Instructions

Task 1: In this task you are **Jason Blue**, the system administrator. You will create a role for Engineering, and add Sarah Boyd to the role.

Step	Action
1	**Login** as Jason Blue, who is an administrator. **Username = *jason*** **Password = *jason***
2	Click the **Admin** system link to access the **Administration** home page.
3	Go to the **Users** section. Click the **Role Management** link to access the Roles list view.
4	Click the **Create Role** action on the **Roles** module tab hover menu.
5	On the **Roles** page, enter the appropriate information to create a Role: **Name:** Engineering Role **Description:** This is the role for all Engineering personnel.

6	Select the appropriate options for module access within the Engineering Role by double-clicking the word Not Set under the **Access** column: **Forecasts:** Disabled **Opportunities:** Disabled **Quotes:** Disabled All other modules should be left as Not Set. **Question 3.1:** What are the options for module Access in a Role? ____
7	Select the appropriate options for user type access within the Engineering Role by double-clicking the word Not Set under the **Access Type** column: **Contacts:** Admin **Leads:** Admin **Cases:** Admin **Bug Tracker:** Admin All other modules should be left as Not Set. **Question 3.2:** What are the options for module Access Type in a Role? ____
8	Click the **Save** button. Review the changes to the Engineering role.
9	In the **Users** sub-panel, click the **Select** button Select Sarah Boyd in the pop-up window.
10	Go to the **Accounts** module.
11	Observe the Team assignment for accounts. **Question 3.3:** Do you see any accounts assigned to Global team? ____
12	**Logout** as Jason Blue.

Task 2: In this task you are **Sarah Boyd**, the Engineering VP. You will verify your access rights based on the Engineering Role.

Step	Action
1	**Login** as Sarah Boyd, who is the Engineering manager. **Username = *sarah*** **Password = *sarah***
2	Observe that the following tabs are not available for you to see or click: • Forecasts • Opportunities • Quotes **Question 3.4:** How many tabs does Sarah see? (Include the ones in the drop-down arrow.) ____
3	Click the **Account** tab to access the **Accounts** list view. **Question 3.5:** Can you see the accounts records? Why or why not? ____
4	Click the **Sarah's user name** link at the top of the window.
5	Observe the team membership for Sarah under the **Advanced tab** and by clicking on the *select* button next to the ***Default Team*** option drop down. **Question 3.6:** Is Sarah a member of the Central team? ____
6	**Logout** as Sarah Boyd.

Solutions #3: Implementing Roles

Answer 3.1 What are the options for module Access in a Role?

Not Set, Enabled, Disabled

Answer 3.2 What are the options for module Access Type in a Role?

Normal, Not Set, Admin

Answer 3.3 Do you see any accounts assigned to Global team?

No

Answer 3.4 How many tabs does Sarah see?

16

Answer 3.5 Can you see the accounts records? Why or why not?

No. Sarah is not on any of the account teams.

Answer 3.6 Is Sarah a member of the Central team? How do you know?

No – the select button only displays those teams Sarah is a member of and Central is not on the list

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Lab #4: Record Reassignment

Goal Reassign records from one user to another

Scenario Recently, Delores Brink in Support has decided to move to another division of the company, and will need her existing Cases to be reassigned. Sarah Boyd is available to assist with managing Delores' Cases.

Outcome Case records that are assigned to Delores Brink will now be reassigned to Sarah Boyd. The default team for these records will be changed to Engineering. The Cases module will be chosen for this operation.

Time 10 minutes.

Instructions

Task 1: In this task you are **Jason Blue**, the system administrator. You will reassign Delores' records to Sarah

Step	Action
1	**Login** as Jason Blue, who is an administrator. **Username = *jason*** **Password = *jason***
2	Click the **Admin** system link to access the **Administration** home page.
3	Go to the **Users** section. Click the **User Management** link to access the Users list view.
4	Click the **Reassign Records** action on the **Users** module tab hover menu.
5	On the **Record Reassignment** page, select the following users in the dropdown: **From User:** Delores Brinks **To User:** Sarah Boyd
6	Select **Engineering** in the **Set team to:** dropdown.

7	Select the **Cases** module in the **Modules to include in reassignment:** dropdown menu. **Question 4.1:** What are the options that appear in the priority multi-select box? ____
8	Click the **Submit** button.
9	On the next screen, an operation confirmation appears. **Question 4.2:** What would the Verbose Output check box be necessary for? ____
10	Click on the **Continue** button.
11	Observe the **Processing Cases** results. **Question 4.3:** How many records were affected by this operation? ____
12	**Logout** as Jason Blue.

Solutions #4: Record Reassignment

Answer 4.1 What are the options that appear in the priority multi-select box?

High, Medium, Low

Answer 4.2 What would the Verbose Output check box be necessary for?

When reassignment is being used with an existing Workflow

Answer 4.3 How many records were affected by this operation?

40

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Lab #5: Field Level Access

Goal Modify field level visibility for an existing Role

Scenario Management has decided that Engineering team will have restricted access to certain fields in the Cases module. The Description and Type field will be available to view but not edit for Engineering users.

Outcome Use the Engineering Role that has been previously created, to apply field level access to restrict users to view only for Description and Type fields.

Time 10 minutes.

Instructions

Task 1: In this task you are **Jason Blue**, the system administrator. You will restrict access to the Description and Type fields.

Step	Action
1	**Login** as Jason Blue, who is an administrator. **Username = *jason*** **Password = *jason***
2	Click the **Admin** system link to access the **Administration** home page.
3	Go to the **Users** section. Click the **Role Management** link to access the Roles list view.
4	Select the **Engineering Role** from the Role list.
5	To the left of the module access grid, select the **Cases** link.
6	Within the Field Permissions section, select the appropriate options **Description:** Read Only **Type:** Read Only **Question 5.5:** What are the options in the permission dropdowns? ____
7	Click the **Save** button.
8	**Logout** as Jason Blue.

Task 2:

In this task you are **Sarah Boyd**, the Engineering manager. You will view how the Field Level Access restrictions have changed visibility with Case records.

1	**Login** as Sarah Boyd, who is the Engineering manager. **Username = *sarah*** **Password = *sarah***
2	Select the **Cases** module
3	Choose the **Subject** link of the Case with Case Number: **667825.**
4	Observe that the **Type** and **Description** fields are available to view.
5	Select the **Edit** button.
6	Observe that **Type** and **Description** are unavailable for editing.
7	**Logout** as Sarah Boyd.

Solutions #5: Field Level Access

Answer 5.5 What are the options in the permission dropdowns?

Not Set, Read / Write, Read / Owner Write, Read Only, Owner Read / Owner Write, None