



# Sugar Suite 4.2 Open Source

## Installation and Upgrade Guide

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Version 4.2  
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## Overview

This Guide describes how to install and upgrade to Sugar Open Source Sugar Suite 4.2. It is intended for experienced administrators and novices alike. After installation, you can configure users and do other administrative tasks. See the Sugar Suite 4.2 *User and Administrator Guide* for more information.

To install Sugar Suite 4.2, ensure that you have the appropriate components installed on your server: See the Sugar Suite 4.2 *Release Notes* for a complete list of the supported software versions.

## Installing Sugar Suite

To install Sugar Suite 4.2, you need to do the following:

1. Download the Sugar files.
2. Copy the Sugar files to your web server.
3. Check and set the dependencies and requirements required by Sugar Suite. See the sub-sections, *System Check Acceptance*, *Database Configuration*, and *Site Configuration*, for more information.
4. Install Sugar with the Sugar Installation Wizard.
5. Log in to Sugar!

## Copy Sugar Files to Web Server

Once you've downloaded Sugar, you need to unzip the Sugar files and set permissions.

1. Locate your *webroot directory* on your web server. This is the directory on your web server where publicly accessible files are made available by your web server. Common locations for webroot includes:

`/var/www/html/` (*Linux/Apache*)

`C:\Inetpub\wwwroot\` (*Windows/IIS*)

`C:\Program Files\Apache Group\Apache\htdocs\` (*Windows/Apache*)

`/Library/Web server/Documents/` (*MacOS X/Apache*)

2. Unzip the Sugar Suite zip file into your webroot. A directory is automatically created within webroot.
3. Rename this directory if desired.
4. Set permissions on your Sugar files. The following directories, all subdirectories, and files must be made writable by your web server user:

- cache
- custom
- data
- modules
- config.php

The system user that your web server uses to access files in your webroot varies depending on your operating system configuration. Common web server users include:

- apache (*Linux/Apache*)
- nobody (*Linux/Apache*)
- IUSR\_computerName (*Windows/IIS*)

If you are unsure of your web server user, consult with your system administrator.

## Install Sugar with the Sugar Installation Wizard

Once you've copied the Sugar files into your webroot, you can now begin to use the Sugar Installation Wizard. The `http://<yourServer>/<yourSugarDirectory>/` directory on your server now corresponds to the Sugar URL that you will use to access the Installation Wizard. You should now be redirected to the Installation Wizard. Click **Start** to begin.

**Note:** At any time prior to accepting the Confirm Setting menu, you can modify any of your settings. To modify any settings, click the **Back** button.

1. **License Acceptance:** Review the Sugar Public License and check "I Accept" to continue. Click **Next** when you are finished.
2. **System Check Acceptance:** In this step, Sugar checks a number of dependencies and system requirements. If all these checks pass successfully, you will be allowed to click **Next** and proceed to the next step. See the System Check Acceptance sub-section for more information
3. **Database Configuration:** In this step, Sugar configures its database information. You may also choose to populate demo data in this step. See the Database Configuration sub-section for more information.
4. **Site Configuration:** In this step, you set your Sugar URL, admin password, and other miscellaneous options. See the Site Configuration sub-section for more information.
5. **Confirm Settings:** Review the settings you provided to the Installation Wizard. To change any settings, click the **Back** button to visit previous steps. *Note that you will not be able to modify settings after this point.* Click **Next** to perform the setup.
6. **Installation Log:** Sugar attempts to install itself with the settings you have provided. The following occurs:
  - a. The configuration file `config.php` is created. If the file can't be created due to a file permissions issue, then the `config.php` file contents are printed to the screen. Cut and paste these values directly into your `config.php` file.
  - b. The primary database tables are created.
  - c. The relationship tables are added and demo data (if applicable) is installed.

After you install, the system prevents inadvertent re-installation. To re-install, change the `installer_locked` setting in the `config.php` file.

Click **Next** to continue.

7. **Registration:** Registration is optional, but we always appreciate your feedback. Please take the time to fill out the registration form and send it to us. After clicking **Send Registration**, you should be redirected to the log in screen. If you choose not to register, click **Finish** to proceed to the log in screen.

## System Check Acceptance

Dependencies and system requirements checks are done by Sugar as part of the installation. If all of these checks pass successfully, you are allowed to click **Next** and proceed to the next step.

### Notes:

- Your database must be configured to work with PHP.
- The cURL Library must be included in your PHP installation.
- The `session_save_path` setting is defined in your `php.ini` file.
- The `memory_limit` setting value (`php.ini` file) does not apply to Windows.

The following dependencies and system requirements checks are done by Sugar:

These components represent the items that are required for installation.

If any components are not set correctly or available, cancel out of the installation and correct the dependency.

In order for your SugarCRM installation to function properly, please ensure all of the system check items listed below are green. If any are red, please take the necessary steps to fix them.

Component	Status
PHP version	Unsupported (ver 4.4.0)
MySQL Database	OK
XML Parsing	OK
cURL Library	OK
Writable SugarCRM Configuration File (config.php)	OK
Writable Custom Directory	OK
Writable Modules Sub-Directories and Files	OK
Writable Data Sub-Directories	OK
Writable Cache Sub-Directories	OK
Writable Session Save Path (/tmp)	OK
PHP Safe Mode Turned Off	OK
PHP Allow Call Time Pass Reference Turned On	OK
PHP Register Long Arrays On	OK
PHP Memory Limit >= 10M	OK (200M)

*Note: Your php configuration file (php.ini) is located at:  
/usr/local/Zend/etc/php.ini*

Help Re-check Back Next

## Database Configuration

The Database Configuration menu allows you to specify your database information including the option to populate the database with demo data.

The host name is typically set to *localhost* if your database server is running on the same machine as your web server.

If you do not have a database name or user name, Sugar allows you to create them at this time.

Be sure that the user has administrative privileges.

Please enter your database configuration information below. If you are unsure of what to fill in, we suggest that you use the default values.

\* Required field

Database Configuration	
* Host Name	localhost
* Database Name	<input type="text"/> <input type="checkbox"/> Create database
* User Name for SugarCRM	<input type="text"/> <input type="checkbox"/> Create user
Password for SugarCRM	<input type="password"/>
Drop and recreate existing SugarCRM tables? <i>Caution: All SugarCRM data will be erased if this box is checked.</i>	<input type="checkbox"/>
Populate database with demo data?	<input type="checkbox"/>
Database account above is a privileged user?	<input checked="" type="checkbox"/>

Help Back Next

## Site Configuration

The Site Configuration menu allows you to set options specific to the Sugar installation such as enabling Sugar updates, and setting up advanced site security.

The URL setting is your Sugar URL. Normally the default value is used.

To customize your session directory, log directory, and application Id, uncheck the advanced site security box.

A supplemental menu appears below the check box for the advanced site security settings.

Please enter your site configuration information below. If you are unsure of the fields, we suggest that you use the default values.

**\* Required field**

**Site Configuration**

\* URL

\* SugarCRM admin password   
*Caution: This will override the admin password of any previous installation.*

\* Re-type SugarCRM admin password

**Sugar Updates Config**

Enable Sugar updates? ☒  
*When this is enabled your system will periodically send SugarCRM Inc. anonymous statistics about your installation that will help us understand usage patterns and improve the product. In return for this information, administrators will receive update notices when new versions or updates are available.*

**Advanced Site Security**

Use defaults? ☒

[Help](#) [Back](#) [Next](#)

## Log into Sugar!

You may now log into Sugar with the username admin and the password you provided the Installation Wizard (see SugarCRM Admin Password).

After a successful log in, you can configure users and do other administrative tasks. See the Sugar Suite *User and Administrator Guide* for more information.

## Upgrading Sugar Suite

The section describes how to upgrade from Sugar Suite 4.0.1x to 4.2. We recommend that you run the upgrade process on a copy of your production system. You must be on version 4.0.1x before upgrading to 4.2.

### Important Upgrade Information

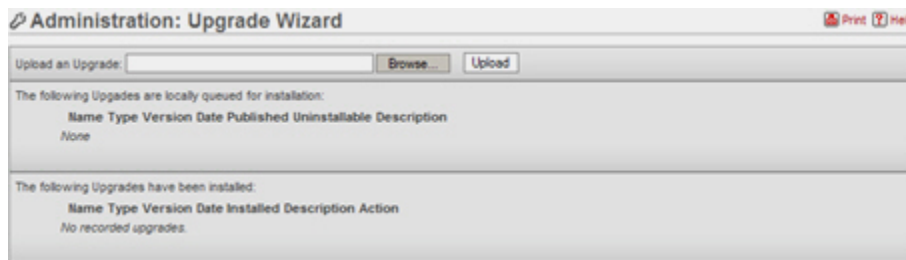
Please read these **important notes** prior to starting your upgrade.

- The Upgrade Wizard is the only supported method for upgrading to Sugar Suite 4.2. The Upgrade Wizard includes critical upgrade logic as well as the SQL commands needed to upgrade to Sugar Suite 4.2.
- Attempting to manually upgrade by simply replacing files and running the upgrade SQL will not work and is not supported. You must use the Upgrade Wizard.
- **Backup your system first.** Before beginning the upgrade process, it is imperative that you perform a backup of your current Sugar directory and your database.

### Upgrading to Sugar Suite 4.2

To upgrade from the 4.0.1x release to Sugar Suite 4.2, do the following:

1. Download the applicable zipped Sugar Suite 4.2 upgrade file.
2. Log in as **admin** and click on the **admin** button.
3. Click on Upgrade Wizard.
4. Browse for and select the upgrade zip file and click on the Upload button to upload the file.



5. Click on the Install button.
6. Click on the Commit button.
7. Upon successful upgrade, you will see a summary of the SQL statements executed to upgrade the database and a list of the files that were overwritten.
8. Click on Back to Upgrade Wizard button which takes you back to the Upgrade Wizard. This button is at the bottom of the screen.