Sugar Open Source
Installation Notes

September 2005
Copyright © 2005 SugarCRM Inc.

Upgrading to Sugar Suite 3.5.1

The following document outlines the steps necessary to upgrade from any previous version of Sugar Suite to the 3.5.1 release.

1) Overview

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

- The Upgrade Wizard is the only supported method for upgrading to Sugar Suite 3.5.1. The Upgrade Wizard includes critical upgrade logic as well as the SQL commands needed to upgrade to Sugar Suite 3.5.1.
- If you are currently running Sugar Suite 3.5.0, 3.5.0 patch A, or 3.5.0 patch B, you will need to upgrade to Sugar Suite 3.5.0 patch C before upgrading to version 3.5.1.
- If you are currently running Sugar Suite 2.5.1, 3.0.0 or 3.0.1, a separate Upgrade Wizard is provided that will take you directly from your current version to Sugar Suite 3.5.1 without needing to upgrade to any of the intermediate releases.
- Sugar Suite 3.5 introduced a new method of upgrading via the Upgrade Wizard in the Admin console. Therefore there are one set of steps for upgrading from Sugar Suite 3.5 to Sugar Suite 3.5.1 and another set of steps for upgrading from previous versions to Sugar Suite 3.5.1.
- 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 to perform a backup of your current Sugar directory and your database.
- Upgrade first on a test instance. We recommend that you run the upgrade process on a copy of your production system and not on the actual production system. Once the upgrade is complete, simply swap out your current production system with your upgraded 3.5 system.

2) Starting from Sugar Suite 2.5 or Earlier

With Sugar Suite 2.5 and earlier, the upgrade process involves manually running SQL scripts. Therefore if you are starting with **versions 1.5, 2.0, 2.0.1 or 2.5**, you will need to first manually upgrade your database to the 2.5.1 version.

To do this, download the Upgrade_to_2.5.1_SQL.zip package from the sugarcrm project on SugarForge.org which includes the following SQL scripts:

- 1.5-2.0_open_db_upgrade.sql
- 1.5d-2.0_open_db_upgrade.sql
- 2.0.x-2.5_open_db_upgrade.sql
- 2.5-2.5.1_open_db_upgrade.sql

Next, use your favorite MySQL query analyzer tool to execute the necessary scripts to upgrade your Sugar Suite database to be 2.5.1 compliant. The scripts must be executed in sequential order.

Proceed to Step 3.

3) Starting from Sugar Suite 2.5.1, 3.0.0 or 3.0.1

Beginning with Sugar Suite 3.0.0, the first Sugar Suite Upgrade Wizard was introduced that steps you through the upgrade process including running upgrade logic against your system as well as SQL scripts.

3.1) Pre-Upgrade

- Download and extract the SugarSuite-3.5.1.zip package from SugarForge.org.

  For example:
  Extract SugarSuite- 3.5.1.zip to */var/www/html/SUGAR351/*

- Copy your production system to a working directory.

  For example:
  Copy */var/www/html/SUGARCRM/* to */var/www/html/SUGAR251/*

- Backup your current Sugar web directory and the Sugar database. Customizations made to your 2.5.1/3.0.0/3.0.1 system may be compromised if the upgrade steps are not followed exactly and you may need to restore files from your backup.

3.2) Guided Upgrade

- Copy the *upgrade* directory from the Sugar 3.5.1 directory to your working Sugar 2.5.1/3.0.0/3.0.1 directory.

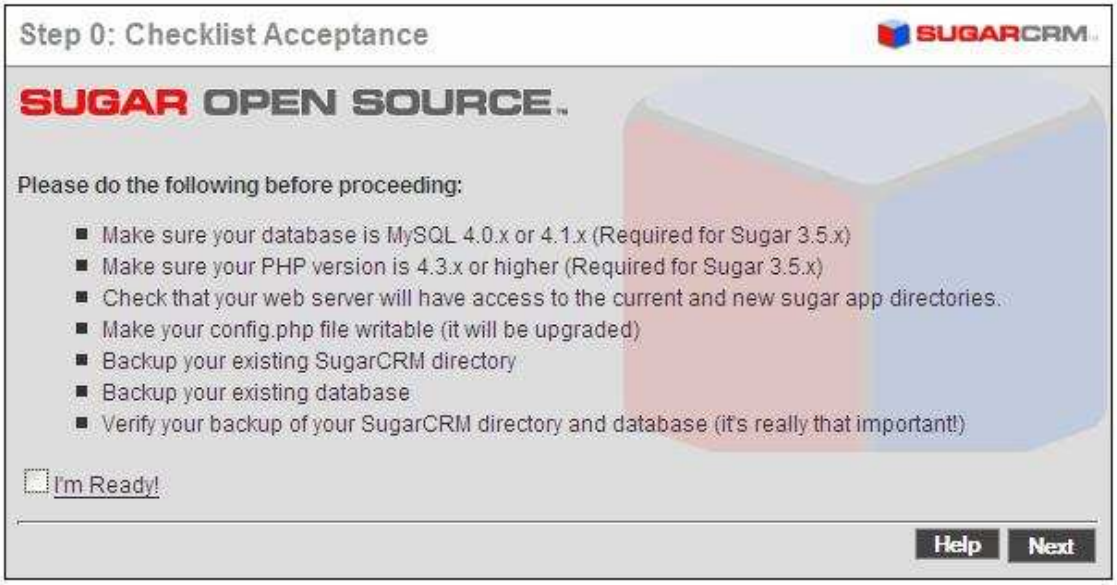
  For example:
  Copy */var/www/html/SUGAR351/upgrade/* to */var/www/html/SUGAR251/upgrade/*

- Make sure the file permissions of the Sugar 2.5.1/3.0.0/3.0.1 working directory and Sugar 3.5.1 directory are readable and writable by your web server user.

- Change your current Sugar 2.5.1/3.0.0/3.0.1 config.php to be writable (it will be upgraded).

  For example:
  chmod a+w */var/www/html/SUGAR251/config.php*

- Point your web browser to: http://HOST/SUGAR251/upgrade/index.php. You will now be in the Guided Upgrade Wizard. Follow the directions provided in the Upgrade Wizard. Check the output of each step for errors before proceeding to the next step.



You now have a fully upgraded Sugar Suite 3.5.1 system.

4) Starting from Sugar Suite 3.5.0

Starting with Sugar Suite 3.5.0, a new and improved Upgrade Wizard was introduced that is accessed via the Admin console. You must use this Upgrade Wizard when upgrading from version 3.5.0 to version 3.5.1.

Note: You must first upgrade to version 3.5.0 patch C before you can upgrade to version 3.5.1.

4.1) Pre-Upgrade

- Download the SugarSuite-Patch-3.5.0c.zip package from SugarForge.org. **Note:** Do not extract this zip package.
- Download the SugarSuite-Patch-3.5.1.zip package from SugarForge.org. **Note:** Do not extract this zip package.
- Copy your production system to a working directory.

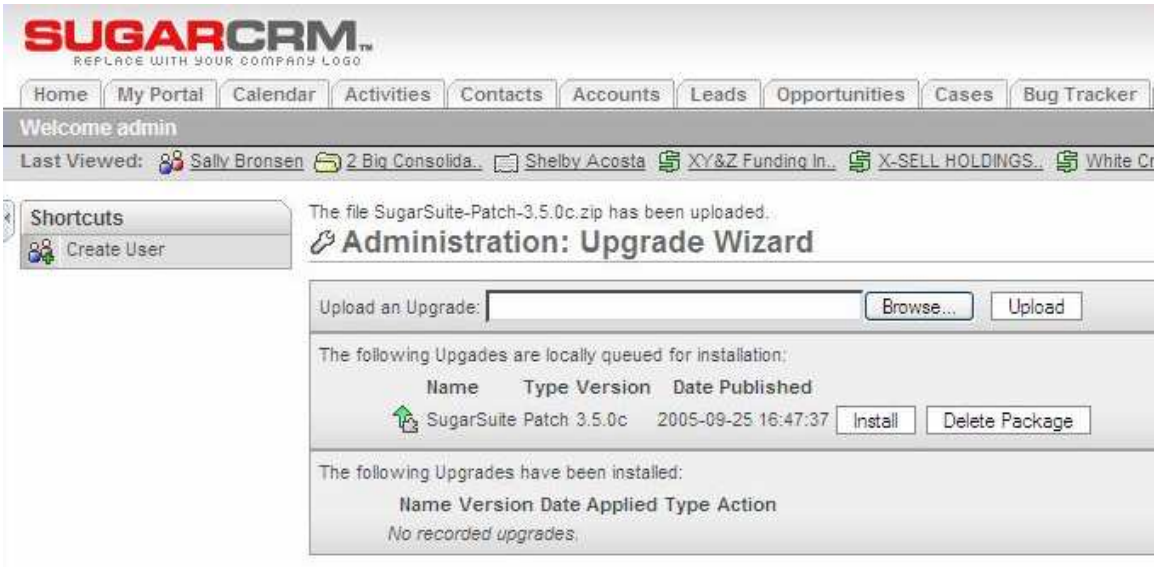
  For example:
  Copy */var/www/html/SUGARCRM/* to */var/www/html/SUGAR351/*
- Backup your current Sugar web directory and the Sugar database. Customizations made to your 3.5 system may be compromised if the upgrade steps are not followed exactly and you may need to restore files from your backup.

4.2) Upgrade Wizard

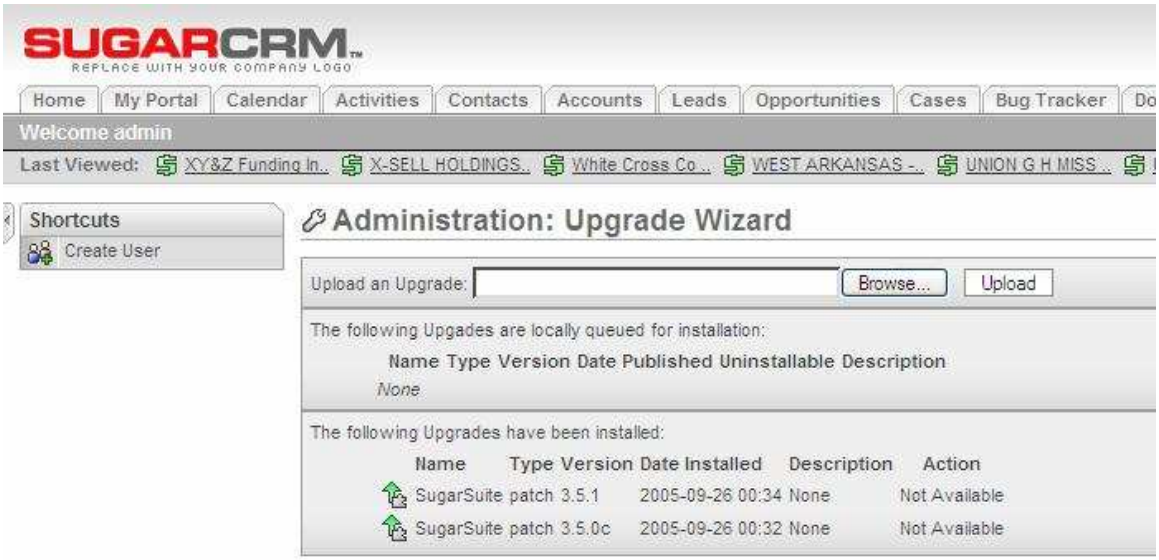
- Make sure the file permissions of the Sugar 3.5.0 working directory are readable and writable by your web server process.
- Change your current Sugar 3.5.0 config.php to be writable (it will be upgraded).

  For example:
  chmod a+w */var/www/html/SUGAR351/config.php*

- Log into Sugar Suite as a user with administrative privileges, click on Admin in the upper right of the screen, and click on Upgrade Wizard.
- Now upload and install the 3.5.0c patch.



- Now upload and install the 3.5.1 patch.



You now have a fully upgraded Sugar Suite 3.5.1 system.

Copyright © 2005 SugarCRM Inc.

SugarCRM Inc.
10050 N. Wolfe Rd. Suite SW2-150
Cupertino, CA 94401 USA

Disclaimer

Software and documents distributed under the License are distributed on an "AS IS" basis, WITHOUT WARRANTY OF ANY KIND, either express or implied. See the License for the specific language governing rights and limitations under the License.

Trademarks
All SugarCRM logos in this document are trademarks of SugarCRM Inc. See the SugarCRM trademark policies at www.sugarcrm.com/trademark for more information on how SugarCRM trademarks can be used.