SUGARCRM™

Sugar Open Source

Installation and Upgrade Guide
Version 4.0
December 2005

Table of Contents

Overview

This Guide describes how to install and upgrade to Sugar Open Source Sugar Suite 4.0. It is intended for experienced administrators and novices alike. After installation, you can configure users and do other administrative tasks. See the Sugar Suite 4.0 *User and Administrator Guide* for more information.

To install Sugar Suite 4.0, ensure that you have the appropriate components installed on your server: See the Sugar Suite 4.0 *Release Notes* for a complete list of the supported software versions.

Installing Sugar Suite

To install Sugar Suite 4.0, 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!

Download Sugar Files

To download the latest Sugar Suite files:

1. Go to http://www.sugarforge.org/content/downloads/

2. Click on the "SugarCRM 4.0 Latest Stable Full" link to download.

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:
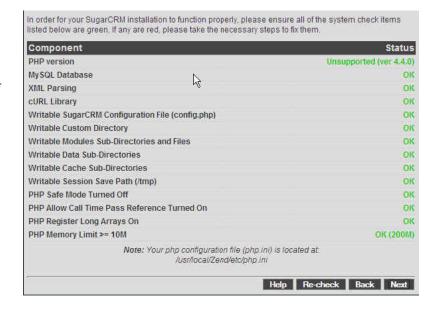
- Your database must be configured to work with PHP.

- 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.

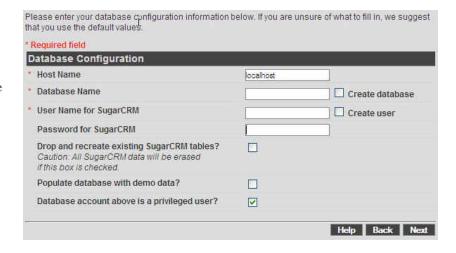If any components are not set correctly or available, cancel out of the installation and correct the dependency.

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

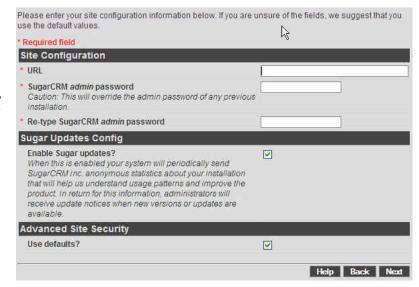|		
* Host Name	localhost	
* Database Name		☐ Create database
* User Name for SugarCRM		☐ Create user
Password for SugarCRM		
Drop and recreate existing SugarCRM tables? Caution: All SugarCRM data will be erased if this box is checked.	☐	
Populate database with demo data?	☐	
Database account above is a privileged user?	☑	

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 advances 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, un-check the advance site security box.

A supplemental menu appears below the check box for the advance 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 version 3.5.1x to Sugar Suite 4.0. We recommend that you run the upgrade process on a copy of your production system.

Note that SugarCRM does NOT support an upgrade path from 4.0 Beta to 4.0 GA (general availability).

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 4.0. The Upgrade Wizard includes critical upgrade logic as well as the SQL commands needed to upgrade to Sugar Suite 4.0.

- 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.

- If you have implemented Campaign Management in your 3.5.1x release, ensure that queued emails from existing email marketing campaigns have been run to completion before upgrading from 3.5.1x to 4.0. Access Admin > Mass Email Manager to ensure that the Queue is empty. If any items are in the queue use the "Send Queued Campaign Emails" button to process those items.

- Backup your system first. Before beginning the upgrade process, it is imperative to perform a backup of your current Sugar directory and your database.

Upgrading to Sugar Suite 4.0

To upgrade from Sugar Suite 3.5.1x to Sugar Suite 4.0, do the following:

1. Download the zipped Sugar Suite 4.0 upgrade file.

2. Log in as **admin** and click on the **admin** button.

3. Click on Upgrade Wizard.

4. Upload the zip file.

5. Click on the install button.

6. The list presented to you is a list of files that will be overwritten by the upgrade. Un-check the files that you do not wish to overwrite. If you un-check a file, you will need to manually merge in the changes by hand after the upgrade process finishes.

7. Click on Commit when you are ready to start the upgrade process.

8. Upon successful upgrade, you will see a large body of text representing the SQL statements executed to upgrade the database and a list of the files that were overwritten. A Return to Upgrade Wizard button takes you back to the Upgrade Wizard. This button is at the bottom of the screen.

9. You must rebuild the relationships and extensions. Go to the Admin screen and click on the Rebuild Relationship and Rebuild Extensions links.

10. If you un-checked any files to prevent the Upgrade Wizard from overwriting then, manually merge the files by extracting the skipped file from the patch zip file. Merge the file that was installed in the Sugar application directory.