Sugar Suite 4.0 Open Source

Installation and Upgrade Guide

Version 4.0.1
January 25, 2006

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:

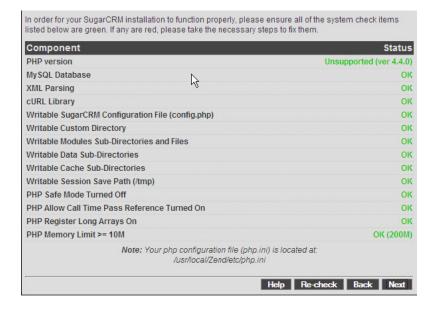- Your database must be configured to work with PHP.

- 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
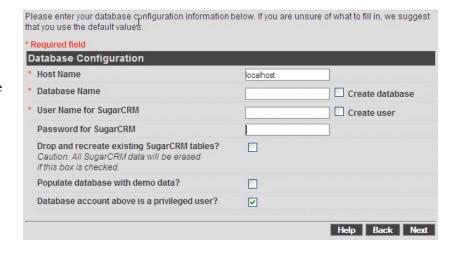
Help Re-check Back Next

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? ☑
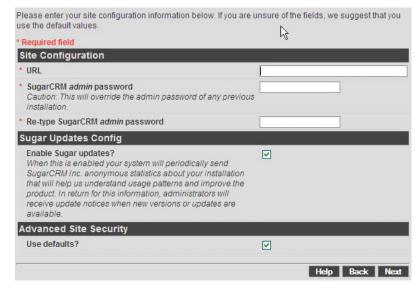
Help Back Next

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 Sugar Suite version 3.5.1x to 4.0.1 and from version 4.0.0 to 4.0.1. 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) or 4.0.1.

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 are upgrading from a 3.5.1x release and you have implemented Campaign Management, ensure that queued emails from existing email marketing campaigns have been run to completion before upgrading. 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 4.0.1

To upgrade from Sugar Suite 3.5.1x or 4.0.0 to Sugar Suite 4.0.1, do the following:

1. Download the applicable zipped Sugar Suite 4.0 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. The list presented to you is a list of files that will be overwritten by the upgrade. This is step 1 (of 2) of the upgrade. These files are required for step 2 of the upgrade.

The following is a list of files that are included in the upgrade. If the checkbox to the left of a file name is not clickable, then it is identical to the existing version and does not need to be updated. All other files contain changes. Only checked files will be copied.

Found post-install script: *scripts/post_install.php*

- ☑ ./modules/Administration/UpgradeWizard_commit.php
- ☑ ./modules/Administration/DisplayWarnings.php
- ☑ ./modules/Administration/UpgradeWizard_prepare.php

Commit

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

8. When the upgrade step 1 process is complete, click on Proceed to Step 2.

Including: cache/upload//upgrades/temp/NWOrtA/scripts/post_install.php
Step 1 of the Sugar 4.0.1 upgrade...complete.

Continue with Step 2 of the Sugar 4.0.1 upgrade by clicking the button below.

Proceed to Step 2...
The following files were copied:

- ./modules/Administration/UpgradeWizard_commit.php
- ./modules/Administration/DisplayWarnings.php
- ./modules/Administration/UpgradeWizard_prepare.php

Upgrade applied successfully!

9. If you have modified any layouts (via Studio) that are modified in this release, you will see a Notice: Customized Layouts Found screen which identifies these layouts. Choose which version (yours or Sugar's) that you want. The default is to retain your customized layouts by leaving the check boxes un-checked.

Notice: Customized Layouts Found

The following file(s) have new fields or modified screen layouts applied via the Studio. The patch you are about to install also contains changes to the file(s). For each file you may:

- **[Default]** Retain your version by leaving the checkbox blank. The patch modifications will be ignored.

or

- Accept the updated files by selecting the checkbox. Your layouts will need to be re-applied via Studio.

☐ Check All
- ☐ ./modules/Leads/EditView.html
- ☐ ./modules/Contacts/EditView.html
- ☐ ./modules/Accounts/EditView.html

If you wish to have both yours and Sugar's modifications to the layouts, you will need to manually merge Sugar's layouts after the upgrade. To merge the layouts, extract the skipped file from the patch zip file and merge it with your file that was installed in the Sugar application directory.

10. Click on Commit.

11. 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.

12. Click on Return to Upgrade Wizard button which takes you back to the Upgrade Wizard. This button is at the bottom of the screen.