Installation Guide

Coupa Express Edition Open Source

July 2007

Disclaimer

Trademarks

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Installation Guide

This document will take you through the installation activities for your Coupa Express Open Source implementation. After using this guide, please refer to the *Getting Started Guide* for your functional setup steps.   For complete explanation of specific features, we recommend that you refer to your *Coupa Express Edition User Guide*.

For a demonstration of the solution, please see Coupa.com, and for our community forums, please visit Coupa Forums. We suggest that you pose questions and experiences in the forums.

Windows Installation

You can install Coupa to run on your Windows-based server, including Windows 2000, 2003, XP and Vista. For Mac OS X or Linux-based installs, please refer to the other sections of this manual.

Step 1: Install MySQL

Coupa eProcurement requires the MySQL database to run. The latest open source version, along with installation instructions, is **available at the MySQL site, currently at this location** http://dev.mysql.com/downloads/mysql/5.0.html#downloads.

We recommend using MySQL version 5.0 or later (although MySQL v4.0 should work, too). Download the complete version (Windows ZIP/Setup.EXE). The Essentials package is available for technically savvy administrators, but this guide will take you through the complete version setup. After downloading it, run the Setup.exe program. MySQL will guide you through their Setup Wizard. We recommend doing the "Typical Install".

After the Install is complete, the system will ask you to run the MySQL Server Instance Configuration Wizard. Click "Next". You'll be asked to pick a configuration type of Detailed or Standard. You'll be asked to create a root password as part of the process.

After this step is complete, run the MySQL Command Line Client (unless you have also installed the GUI tools. You'll be asked to enter in your root password.

To create the database, enter: CREATE DATABASE coupa;

MySQL should create the database and return **Query OK, 1 row affected (0.00 sec)**

Step 2: Install Ruby

Coupa uses the Ruby Programming Language, either version 1.8.5 or 1.8.6. Please download it from http://rubyforge.org/frs/?group_id=167. Pick the One-Click Installer for Windows.

As you go through the installer wizard, it will ask you if you want to install some additional components. Make sure that you check "Enable RubyGems". RubyGems is the package manager for Ruby.

Step 3: Install Additional Gems

Once your Ruby install is complete, it should create some a Ruby folder in your Programs menu. With the Ruby Folder is the RubyGems folder. Expand that and you should see the RubyGems Package Manager. Open up that program which will open a command window. It will give you a command prompt in the Ruby directory that was created during your install. If you didn't specify another location, it will probably be C:\ruby.

First, you need to install Rails, the application framework used by Coupa. Type "gem install rails". The system will ask you if you want to install a series of required dependencies. Enter "Y" for yes.

Next step is to install Ferret, the fulltext search engine used by Coupa. Type "gem install ferret". You will likely be asked which gem to install. Pick the latest one for Windows environment, currently "ferret 0.11.4 (mswin32)".

Next, install the acts_as_ferret module that provides an interface between the Ferret search engine and the Rails framework. Type "gem install acts_as_ferret" and pick the latest version, currently 0.4.0.

Next is the RTF generation library. Type "gem install rtf".

Next step is to install the native MySQL bindings. Type "gem install mysql". Again, pick the latest version for Windows environment.

Finally, install the VPIM contact library. Type "gem install vpim".

Optional: Install Mongrel, a fast web server written in Ruby. If you want to use mongrel, either individually or in a cluster, type "gem install mongrel".

Step 4: Extract the Coupa Source Code

Download the latest source code files, which are available from Coupa.com and Sourceforge.net at http://sourceforge.net/project/showfiles.php?group_id=173226.

Extract the archive file into a desired folder on your machine (e.g., C:\coupa). . The next step is to configure the system to utilize the MySQL database that you created in Step 1. Open a command window and navigate to your newly created folder by typing "cd C:\coupa" (or whatever folder you placed the Coupa source code.

Edit the database.yml file using Notepad or another Windows text editor. Make sure that the database you created in Step 1 is entered in the "database:" field in the file under the "development" section. Also, enter the root password that you created on the MySQL install.

Note that by default the Coupa installation is configured to run in development mode, which gives helpful error messages but also prevents ongoing caching of the code. If you'd like to run in production mode, with diagnostic logging disabled and no dynamic code reloading, fill in the "production" part as well. Your file should be similar to the following:

```
development:
  adapter: mysql
  database: coupa (use the database that you created in Step 1)
  username: root
  password: welcome (use your root password here)
  host: localhost

# Warning: The database defined as 'test' will be erased and
# re-generated from your development database when you run 'rake'.
# Do not set this db to the same as development or production.
test:
  adapter: mysql
  database: coupa_test
  username: root
  password: welcome
  host: localhost
```

```
production:
  adapter: mysql
  database: coupa_production
  username: root
  password: welcome
  host:  localhost
```

Step 5: Load the Tables and Seed Data

At a command prompt in your applications root directory, e.g., C:\coupa, you can use the rake tool to load the database tables. Type "rake db:schema:load".

Once the tables have been created, you should load seed data. There are 2 choices:

1) The default set of seed data includes a small amount of sample transactional data to make it easy to get a feel for the system. To load this set, type "rake db:seed:load".

2) An alternative set includes only basic data needed for the system to work, such as countries, currencies, units of measure, and so on. To load this set, type "rake db:seed:load SRC=db\blank"

Step 6: (Optional) Configure Email

Coupa eProcurement Express supports sending email notifications to users, transmitting purchase orders to suppliers over email, and receiving email-based requisition approvals. In order to make use of these, you need to configure both an outbound mail server and inbound mail processing. For Windows instances, we recommend using XMail. Setup instructions can be found here:

http://blog.coupa.com/2006/12/13/receiving-emails-with-actionmailer-on-windows

Step 7: Start Servers

There are three steps:

1) Start the background processor. This is used for file loaders and other processes not driven by a user request. In the command prompt window type "ruby script\backgroundrb\start -d", which will start the processs and run it in the background.

2) Start the web server. If you installed the optional mongrel server above, type "mongrel_rails start". Otherwise, type "ruby script\server"

3) Open a web browser (Firefox 1.5+ or IE 6+) and go to http://127.0.0.1:3000 – you should see the Coupa login screen. You can log in with the user "williams" and password "welcome" and begin exploring the system if you loaded the default set of seed data (Option #1 in step 5) or user "admin" and password "welcome" if you loaded the minimum set of data (Option #2 in step 5).