

Installation Guide

Coupa Express Edition Open Source

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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 go to www.coupa.org. Coupa also has an on-demand version that contains additional capabilities, which is available at www.coupa.com.

Windows Installation

You can install Coupa to run on your Windows-based server, including Windows 2000, 2003, XP and Vista or Mac OSX or LINUX. This guide will focus on Windows-based install.

Step 1: Download MySQL

Coupa eProcurement requires the MySQL 5.0+ database. The open source version, along with installation instructions, is **available at the MySQL site, currently at <http://dev.mysql.com/downloads/mysql/5.0.html#win32>**. We recommend that you use the latest 5.0 version. 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.

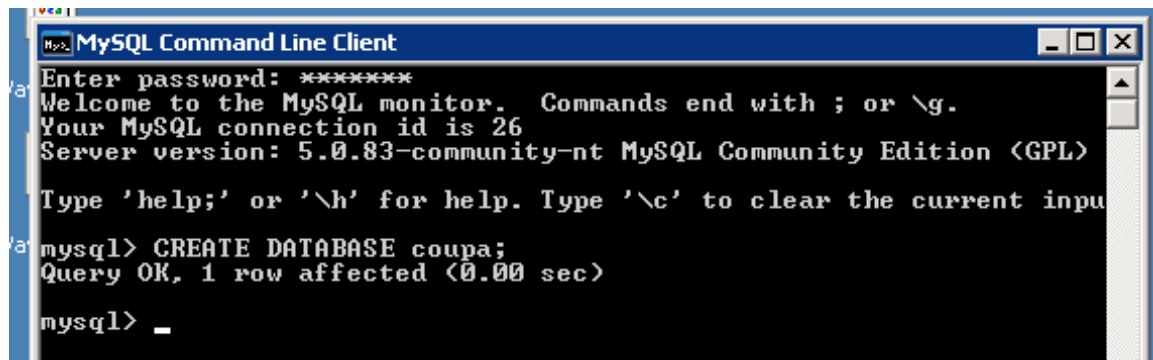
Step 2: Install MySQL

After downloading MySQL, 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. Recommend that you pick Standard. The installer may ask if you want to include the Bin directory in windows PATH. You should check that.

The last step of the install is to create a root password. Put one in and remember it, as you'll need it soon.

Step 3: Create a database in MySQL for Coupa Express

Open the MySQL Command Line Client, which should be in your Programs list under MySQL / MySQL Server 5.0. It will ask for your password in Step 2. Then, to create the database, enter: `CREATE DATABASE coupa;`



```
MySQL Command Line Client
Enter password: *****
Welcome to the MySQL monitor.  Commands end with ; or \g.
Your MySQL connection id is 26
Server version: 5.0.83-community-nt MySQL Community Edition (GPL)

Type 'help;' or '\h' for help. Type '\c' to clear the current input statement.

mysql> CREATE DATABASE coupa;
Query OK, 1 row affected (0.00 sec)

mysql> _
```

Step 4: Install Ruby

Coupa uses the Ruby Programming Language. You should download the One-Click Windows installer, downloaded from http://rubyforge.org/frs/?group_id=167&release_id=28426. Pick the 1.8.6-27 Release Candidate 2 using the .exe (Windows Executable). 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. We also recommend unchecking SciTE.

Step 5: Install Additional Gems

Coupa Express requires certain additional Gems to be installed. The easiest way to install gems is via the RubyGems Package Manager which can be open in your Programs list under Ruby-186-27 / RubyGems.

Please note that you should install the versions listed here as certain combination of gems may cause problems interacting with Coupa Express.

From the RubyGems Package Manager, type:

1. `gem install rails -v 1.2.3`
2. `gem install ferret -v 0.11.4`
3. `gem install -y -v 0.4.1 acts_as_ferret`
4. `gem install rtf`
5. `gem install mysql`
6. `gem install vpim`
7. `gem install rake -v 0.7.3`
8. `gem install mongrel`
9. `gem uninstall rake -v 0.8.1` (or any other version of rake that is currently on your system. Type “gem list” to see all gems and their version)

At this point, if you run “gem list”, you should see the following:

```

C:\Ruby>gem list

*** LOCAL GEMS ***

actionmailer (1.3.3)
actionpack (1.13.3)
actionwebservice (1.2.3)
activerecord (1.15.3)
activesupport (1.4.2)
acts_as_ferret (0.4.1)
cgi_multipart_eof_fix (2.5.0)
ferret (0.11.4)
fxri (0.3.6)
fxruby (1.6.16)
gem_plugin (0.2.3)
hpricot (0.6.164)
log4r (1.0.5)
mongrel (1.1.5)
mysql (2.7.3)
ptools (1.1.6)
rails (1.2.3)
rake (0.7.3)
rtf (0.1.0)
ruby-opengl (0.60.0)
test-unit (2.0.1)
vpim (0.695)
win32-api (1.2.1, 1.2.0)
win32-clipboard (0.4.4)
win32-dir (0.3.2)
win32-eventlog (0.5.0)
win32-file (0.5.5)
win32-file-stat (1.3.1)
win32-process (0.5.9)
win32-sapi (0.1.4)
win32-sound (0.4.1)
windows-api (0.2.4)
windows-pr (0.9.3)

```

Step 6: Download the Coupa Express Source Code

Download the latest source code files, which are available from Sourceforge.net at <http://sourceforge.net/projects/coupa/files/>. You want to download the coupa-1.5.zip file which is the latest version. Extract the archive file into a desired folder on your machine (e.g., C:\coupa).

Step 7: Configure the MySQL database

The next step is to configure the system to utilize the MySQL database that you created earlier. Navigate (via Windows) to your newly created Coupa folder (e.g., C:\coupa-1.5). Go into the config directory. There should be a file called database.yml in that folder. Open it in Wordpad or other text editor. Edit the database.yml file using Notepad or another Windows text editor. Make sure that the database you created in Step 3 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 (Step 2).

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, you can use the file that is in the \config\databases folder. You must 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

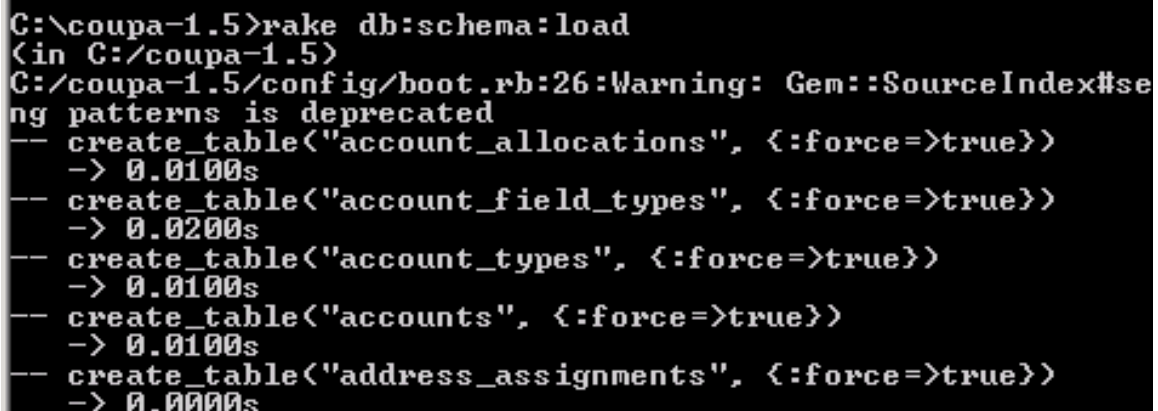
# Warning: The database defined as 'test' will be erased and
# re-generated from your development database when you run 'rake'.
# Do not set this db to the same as development or production.
test:
  adapter: mysql
  database: coupa_test
  username: root
  password: welcome
  host: localhost

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

```

Step 8: Load the Tables

At a command prompt in your applications root directory, e.g., C:\coupa-1.5, you can use the rake tool to load the database tables. Type “rake db:schema:load”.



```

C:\coupa-1.5>rake db:schema:load
<in C:/coupa-1.5>
C:/coupa-1.5/config/boot.rb:26:Warning: Gem::SourceIndex#se
ng patterns is deprecated
-- create_table("account_allocations", {:force=>true})
-> 0.0100s
-- create_table("account_field_types", {:force=>true})
-> 0.0200s
-- create_table("account_types", {:force=>true})
-> 0.0100s
-- create_table("accounts", {:force=>true})
-> 0.0100s
-- create_table("address_assignments", {:force=>true})
-> 0.0000s

```

Step 9: Load the Seed Data

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”

```

C:\coupa-1.5>rake db:seed:load
<in C:/coupa-1.5>
C:/coupa-1.5/config/boot.rb:26:Warning: Gem::S
ng patterns is deprecated
Loaded suite C:/Ruby/bin/rake
Started

Finished in 0.0 seconds.

0 tests, 0 assertions, 0 failures, 0 errors
C:\coupa-1.5>

```

2. An alternative minimum 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 10: (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. There are many different mail servers, so please refer to the documentation that is applicable for your mail server and how it works with actionmailer.

Step 11: Start Background Server

Coupa uses a background processor called backgroundrb for file loaders and other processes not driven by a user request. In the command prompt window of your coupa directory, type “ruby script/backgroundrb/start”, which will start the process.

```

C:\coupa-1.5>ruby script/backgroundrb/start
./script/backgroundrb/../../config/boot.rb:26:Warning
upport for String patterns is deprecated
C:/Ruby/lib/ruby/gems/1.8/gems/acts_as_ferret-0.4.1/1
rning: parenthesize argument(s) for future version
DRb URI: druby://localhost:22222
Pid: 1760
Autostart...
done

```

Step 12: Start Web Server

Start the web server, Mongrel. From a new command prompt window, type “mongrel_rails start”.


```
C:\coupa-1.5>mongrel_rails start
** Starting Mongrel listening at 0.0.0.0:3000
** Starting Rails with development environment...
C:/coupa-1.5/config/boot.rb:26:Warning: Gem::Source
ng patterns is deprecated
C:/Ruby/lib/ruby/gems/1.8/gems/acts_as_ferret-0.4.
rning: parenthesize argument(s) for future version
** Rails loaded.
** Loading any Rails specific GemPlugins
** Signals ready. INT => stop (no restart).
** Mongrel 1.1.5 available at 0.0.0.0:3000
** Use CTRL-C to stop.
```

Step 13: Start Using Coupa

Open up your IE or Firefox web browser and go to <http://127.0.0.1:3000>. Here you should see the Coupa login screen.

In step #9, if you loaded the default seed data (option #1), then you can log in with the user "williams" and password "welcome" and begin exploring the system.

In step #9, if you loaded the minimum seed data (option #2), then you can login with the user "admin" and password "welcome".