

ZuckerDocs 1.4.5 Installation Manual

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Introduction

This is the installation manual for ZuckerDocs, Version 1.4. ZuckerDocs is an addon module for Sugar, the well-known Open Source Customer Relationship Management Software.

Please follow this manual step-by-step and check carefully.

Installation of Requirements

This Requirements are recommendations. It is impossible to test on each combination of each version of all requirements, but slightly different version numbers won't cause problems in general. For Windows users, installation of Xampp >= 1.4.13 (<http://www.apachefriends.org/en/xampp.html>) is recommended, as most of the requirements are included in the all-in-one installer. For installation instructions for the requirements please consult the given webpages or your favourite search engine.

Apache > 1.3

<http://www.apache.org>

MySQL > 4.0

ZuckerDocs relies on unions, inner joins and outer joins, which are not supported by earlier MySQL versions.

<http://www.mysql.org>

PHP > 4.3.0

<http://www.php.net>

KnowledgeTree DMS 3.0.1 (optional)

<http://kt-dms.sourceforge.net>

Sugar Suite 4.2 (Open Source or Professional)

ZuckerDocs 1.3 has been tested with Sugar 4.2. Maybe it works on other versions.

Add ZuckerDocs to Sugar Suite



It takes three steps to install ZuckerDocs:

- add ZuckerDocs module to your Sugar installation
- prepare and configure ZuckerDocs database
- modify other Sugar modules to link to ZuckerDocs (optional)
- add “My Documents” to the Home (optional)

Add ZuckerDocs module to your Sugar installation

Login to Sugar with your “admin” account and click on “Admin” (right on the top) to open the “Admin”-module.

Click on “Module Loader”

es	 Backups	Perform a backup
	 Module Loader	Add or remove modules to Sugar

Click on the “Browse...” button and select to file ZuckerDocs_<version>_module.zip included in the ZuckerDocs distribution. Click on the “Upload” button.

Administration: Module Loader

Upload a Module: <input type="text" value="st_1.3\package\ZuckerDocs_1.3_module.zip"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/>										
The following Modules are locally queued for installation: <table><thead><tr><th>Name</th><th>Type</th><th>Version</th><th>Date Published</th></tr></thead><tbody><tr><td colspan="4">None</td></tr></tbody></table>	Name	Type	Version	Date Published	None					
Name	Type	Version	Date Published							
None										
The following Modules have been installed: <table><thead><tr><th>Name</th><th>Version</th><th>Date Applied</th><th>Type</th><th>Action</th></tr></thead><tbody><tr><td colspan="5">No recorded upgrades.</td></tr></tbody></table>	Name	Version	Date Applied	Type	Action	No recorded upgrades.				
Name	Version	Date Applied	Type	Action						
No recorded upgrades.										

Note: if you receive the error “Please specify a file and try again!”, then open your `php.ini` with your favourite text editor, increase the maximum filesize for upload to 10M and restart apache afterwards:

```
post_max_size = 10M
upload_max_filesize = 10M
```


You can now see ZuckerDocs in the list of available modules. Click on the “Install” button to install the module.

The file ZuckerDocs_1.3_module.zip has been uploaded.

Administration: Module Loader

Upload a Module:

The following Modules are locally queued for installation:

Name	Type	Version	Date Published	
 ZuckerDocs Module 1.3		2005/09/05	<input type="button" value="Install"/>	<input type="button" value="Delete Package"/>

The following Modules have been installed:

Name	Version	Date Applied	Type	Action
No recorded upgrades.				

On the next screen click on “Commit” to start installation.

Module is ready to be installed. Click "Commit" to proceed with installation.

If everything works, you will see a screen telling that installation is completed.

100%

[Display Log](#)
Complete
Module Installed successfully!

Note: you may receive more detailed information when clicking on “Display Log”

100%

Merging application files for modules.ext.php in Ext/Include

Copying .../module/ZuckerDocs to modules/ZuckerDocs

Copy C:\DOCUME~1\tremif\LOCALS~1\Temp\31D.tmp/module/ZuckerDocs

Copying .../root/download.php to download.php

Copy C:\DOCUME~1\tremif\LOCALS~1\Temp\31D.tmp/root/download.php

Installing Images

Copy C:\DOCUME~1\tremif\LOCALS~1\Temp\31D.tmp/images

Installing Language Pack ...C:\DOCUME~1\tremif\LOCALS~1\Temp\31D.tmp/application/app_strings.en_us.lang.php for application

Installing Language Pack ...C:\DOCUME~1\tremif\LOCALS~1\Temp\31D.tmp/application/app_strings.ge_ge.lang.php for application

Rebuilding Language...en_us

Merging module files for en_us.lang.ext.php in Ext/Language/

Merging application files for en_us.lang.ext.php in Ext/Language/

Rebuilding Language...ge_ge

Merging module files for ge_ge.lang.ext.php in Ext/Language/

Merging application files for ge_ge.lang.ext.php in Ext/Language/

Installing Bean : ZuckerDocs

File Does Not Exist:

Complete

Module Installed successfully!

[Back to Module Loader](#)

Click on the “Back to Module Loader” button to return to the module list. You can now see ZuckerDocs in the list of installed modules.


Administration: Module Loader

Upload a Module:

The following Modules are locally queued for installation:

Name	Type	Version	Date Published
None			

The following Modules have been installed:

Name	Version	Date Applied	Type	Action
 cache/upload/upgrades/module/ZuckerDocs_1.3_module.zip	1.3	2005-09-06 11:44	module	<input type="button" value="Uninstall"/>

Back in the „Admin“-module, click on „Configure Tabs“. You will see a line “ZuckerDocs” in the “Hide Tabs” box.









SUGARCRM
REPLACE WITH YOUR COMPANY LOGO



My Account | Employees | Admin | Logout | About

SUGAR SUITE

Home | My Portal | Calendar | Activities | Contacts | Accounts | Leads | Opportunities | Cases | Bug Tracker | Documents | Emails

Welcome admin

Last Viewed:  Florian Trem  logo.gif  logo.gif  Kathleen Adams  Pipeline By Sal.  2 Big Consolida.  asdfasdfsfas  24/7 Couriers

 Shortcuts
 Create User

Administration: Configure Tabs

* Indicates required field

Edit Tabs

Display Tabs

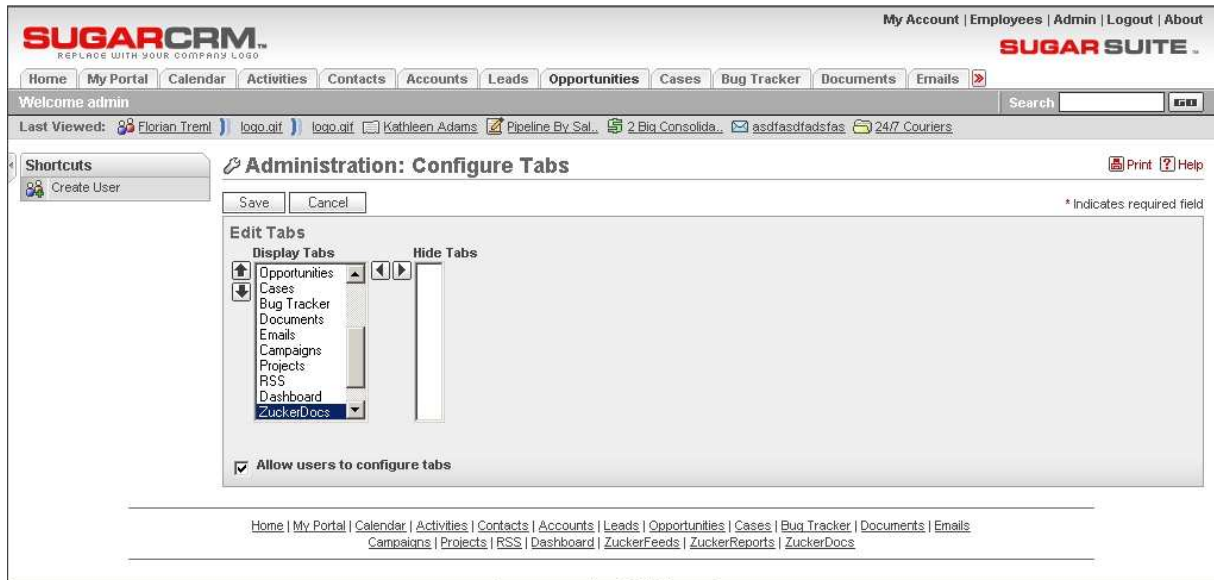
Home
My Portal
Calendar
Activities
Contacts
Accounts
Leads
Opportunities
Cases
Bug Tracker

Hide Tabs

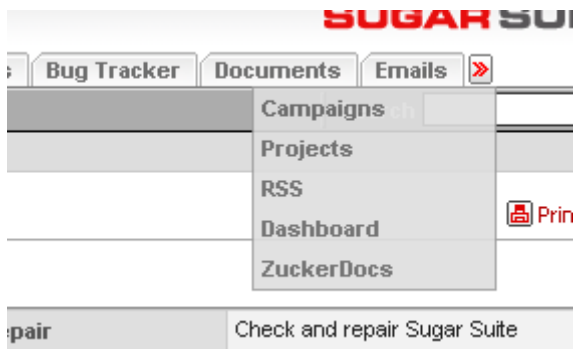
ZuckerDocs

☒ Allow users to configure tabsHome | My Portal | Calendar | Activities | Contacts | Accounts | Leads | Opportunities | Cases | Bug Tracker | Documents | Emails
Campaigns | Projects | RSS | Dashboard | ZuckerFeeds | ZuckerReports | ZuckerDocs

Select „ZuckerDocs“ in the „Hide Tabs“ box and click on the arrow pointing to the left. Click on the “Save”-button.



You can now see the new “ZuckerDocs” tab in Sugar.



Prepare and configure ZuckerDocs database

ZuckerDocs requires a separate MySQL database, which can run on the same MySQL server as your Sugar database (recommended).

Note: ZuckerDocs can connect to an existing KnowledgeTree database as well, but it is a rather complicated task, which caused heavy problems with most users.

Note: Be sure to be logged in as user with administrative rights to accomplish the following steps, either with mysql commandline or another frontend as phpMyAdmin.

Option 1: ZuckerDocs database on the same MySQL server as Sugar (recommended)

- Create a database called “dms”

```
mysql> create database dms;
```

- Grant your Sugar MySQL user access rights for this database (have a look at your config.php if you don't know your Sugar MySQL user) and reload privileges table

```
mysql> grant all on dms.* to sugar@localhost;  
mysql> flush privileges;
```

- Execute the “setup-structure.sql” script in your mysql prompt to prepare schema.

```
cmd> mysql -u root -p dms < setup-structure.sql
```

- Execute the “setup-data-zuckerdocs.sql” script in your mysql prompt to prepare database for ZuckerDocs access.

```
cmd> mysql -u root -p dms < setup-data-zuckerdocs.sql
```

- Open the file “<Sugar-Root>/modules/ZuckerDocs/dms/conf.inc” in your favourite text editor and adapt the database settings.

```
$dmsUseSugarMysqlServer = true;  
$dmsDbName = "dms";
```

You can ignore all the other database settings in conf.inc for this installation option.

Option 2: ZuckerDocs database on another MySQL server

- Create a database called “dms” (use another name, if you prefer) and a MySQL user with access rights.
- Execute the “setup-structre.sql” and “setup-data-zuckerdocs.sql” scripts in your mysql prompt to prepare tables and data.
- Open the file “<Sugar-Root>/modules/ZuckerDocs/dms/conf.inc” in your favourite text editor and adapt the database settings.

```
$dmsUseSugarMysqlServer = false;  
$dmsDbType = "mysql";  
$dmsDbHost = "<your-host>";  
$dmsDbName = "dms";  
$dmsDbUser = "<your-user>";  
$dmsDbPwd = "<your-password>";
```

There is a bug in Sugar up to version 3.5.1 (and presumably in upcoming versions), which prevent Sugar modules to connect to different databases and databases running on another host. You have to make minor code changes in Sugar to enable this option.

Open the file include/database/PearDatabase.php in your favourite text editor.

Search for “mysql_select_db” (should be round line 510, depending on Sugar version – line 505 in Sugar Open Source 3.5.1) and change

```
@mysql_select_db($this->dbName) or sugar_die( "Unable to select database: " . mysql_error());  
to  
@mysql_select_db($this->dbName, $this->database) or sugar_die( "Unable to select database: " .  
mysql_error());
```

Search for “mysql_query” (should be round line 210, depending on Sugar version – line 210 in Sugar Open Source 3.5.1) and change

```
$result =& mysql_query($sql);  
to  
$result =& mysql_query($sql, $this->database);
```

Remember to repeat these changes when you upgrade your Sugar.

Congratulations, you have successfully installed ZuckerDocs and can start using it. For now you can manage documents and organize them into folders. If you want your documents linked to your Sugar items like contacts, accounts, leads etc, or to display the “My Documents” folder on your Home, please follow the next chapters.

Modify Sugar modules to link to ZuckerDocs

Unfortunately there currently is no other way to do this than making minor changes to the existing Sugar program files. Sugar is organized into modules, where each module has its own directory beneath the “modules” directory. For each module you want to be interlinked with ZuckerDocs, you have to change the file “DetailView.php” within the module directory.

Note: please do a backup of DetailView.php before making the changes. You have to be something familiar with PHP coding.

Just add the line

```
<? include('modules/ZuckerDocs/SubPanelView.php'); ?>
```

at the very bottom of DetailView.php to include the ZuckerDocs panel in a module. Afterwards, you will find a new “Documents” section when viewing the details.

Subject: Case 1		Created: 2005-06-02 15:09 by admin	
Description:			
Resolution:			
⌵ Contacts			
<input type="button" value="Create"/> <input type="button" value="Select"/>			
Contact Name	Contact Role	Email	Phone
⌵ Open Activities			
<input type="button" value="Create Task"/> <input type="button" value="Schedule Meeting"/> <input type="button" value="Schedule Call"/> <input type="button" value="Compose Email"/>			
Close	Subject	Status	Contact
			Related to
			Due Date
⌵ History			
<input type="button" value="Create Note or Attachment"/> <input type="button" value="Archive Email"/>			
Subject	Status	Contact	Related to
			Last Modified
⌵ Bug Tracker			
<input type="button" value="Create"/> <input type="button" value="Select"/>			
Num.	Subject	Status	Type
			Priority
⌵ Documents			
<input type="button" value="Create"/> <input type="button" value="List Documents"/>			
Document Name	Category	Last Modified	Status

Modify Home to include “My Documents”

You have to change the files “Home.html” and “index.php” within the “<Sugar-Root>/modules/Home” directory.

Caution: please do a backup of these files before making the changes. You have to be something familiar with PHP coding.

Home.html

Add a “MYDOCUMENTS” slot to the layout

```
...
<!-- BEGIN: main -->
<table cellpadding="0" cellspacing="0" border="0" valign="top"
width="100%">
<tr> <td valign="top" width="100%">
...
<slot>{MYOPPORTUNITIES}</slot>
<slot>{MYDOCUMENTS}</slot>
<slot>{MYCASES}</slot>
...
</td>
</tr>
</table>
<!-- END: main -->
...
```

index.php

Add the code for MyDocuments subpanel:

```
...
if(array_key_exists('Bugs', $modListHeader))
    $panels['MYBUGS'] = "modules/Bugs/MyBugs.php";
if(array_key_exists('Calendar', $modListHeader))
    $panels['MYCAL'] = "modules/Calendar/small_month.php";
if(array_key_exists('ZuckerDocs', $modListHeader))
    $panels['MYDOCUMENTS'] = "modules/ZuckerDocs/MyDocuments.php";
...
```

Afterwards, you will find a the “My Documents” panel on your Home.

Enter Business Card
Create Account
Create Lead
Create Opportunity
Create Case
Report Bug
Schedule Meeting
Schedule Call
Create Task

ew Contact

first Name:

ast Name: *

hone:

mail:

Save

		Review needs	2005-05-16 10:03	📄	🔍
📄	☑	Demo	2005-05-20 10:03	📄	🔍
📄	☑	Demo	2005-05-21 10:03	📄	🔍
📄	☑	Initial discussion	2005-05-26 10:03	📄	🔍

My Top Open Opportunities

Opportunity	Account Name	Amount	Close
247 Couriers - 1000 units	247 Couriers	\$ 75000	2005-05-08
2 Big Consolidation Corp - 1000 units	2 Big Consolidation Corp	\$ 75000	2005-12-08
A.D. Arts & Crafts Inc - 1000 units	A.D. Arts & Crafts Inc	\$ 75000	2005-09-09
A/Z Co Ltd - 1000 units	A/Z Co Ltd	\$ 75000	2005-07-09
ABC FUEL CO - 1000 units	ABC FUEL CO	\$ 75000	2005-11-15

My Documents

Document Name	Category	Last Modified	Status
📄 ZuckerOffice Mail DataSheet	Generic	2005-06-02 15:19:50	c/i - 0.1

My Open Cases

Start Previous (1 - 1 of 1) Next End

Close	Numb.	Subject	Account Name	Priority	Status
☑	1	Case 1	2 Big Consolidation Corp	Medium	New

My Leads

Start Previous 0 - 0 of 0 Next End

Sun	Mon	Tue	Wed
			1
5	6	7	8
12	13	14	15
19	20	21	22
26	27	28	29

◀ Previous Month

My Pipeline

Pipeline total is \$34:

- Prospecting 105
- Qualification
- Needs Analysis
- Value Proposition
- Id. Decision Makers
- Perception Analysis
- Proposal/Price Quote
- Negotiation/Review
- Closed Won
- Closed Lost

\$0 \$125 \$250

Rollover a bar for details

Date range is 2005-05-16 to 2005-06-02

Extending Document Categories

ZuckerDocs supports document categorization for search and indexing. This chapter describes how to extend the list of available categories.

Login to Sugar with your “admin” account and click on “Admin” (right on the top) to open the “Admin”-module.
Click on “Dropdown Editor”

Select the Dropdown “doc_category” and click on the “Select” button.

➤ Dropdown Select

You can now add/delete categories and resort the list.

➤ Dropdown List

Add		
Key	Value	
Generic	Generic	↑ up ↓ dn + ins ✎ edit 🗑 del
Business Reports	Business Reports	↑ up ↓ dn + ins ✎ edit 🗑 del
Bug Description	Bug Descriptions	↑ up ↓ dn + ins ✎ edit 🗑 del
Document Template	Document Templates	↑ up ↓ dn + ins ✎ edit 🗑 del

ZuckerDocs Fulltext Search

The “FileIndexer” doesn’t work with this ZuckerDocs release anymore, as KnowledgeTree changed the way file indexing works! Will be handled in future releases.

You may however use the KnowledgeTreeUI for doing the file indexing, and use the Fulltext Search function in ZuckerDocs as before.

KnowledgeTree Installation (optional)

Please follow installation instructions contained in the KnowledgeTree distribution. Use the database you created in the step above to enable shared access with ZuckerDocs. If you want to have ZuckerDocs to include hyperlinks for document management with KnowledgeTree, open modules/ZuckerDocs/dms/conf.inc and enter the URL of your KnowledgeTree installation by uncommenting and adapting the "dmsBase"-line.

```
$dmsBase = "/knowledgeTree" ;
```

Getting help

Please join the ZuckerDocs discussion at <http://www.sugarforge.org/projects/zuckerdocs/>. If you desire professional support, please contact sales@go-mobile.at.

Links

http://www.sugarcrm.com	Homepage of the company behind SugarCRM
http://www.sugarforge.net	SugarCRM extensions and development platform
http://www.go-mobile.at	Homepage of the company behind ZuckerDocs and other SugarCRM extensions (Microsoft Office Plugin, Mozilla Thunderbird Plugin, ZuckerReports, ...)
http://www.sugaraddicts.org/	SugarCRM community pages