



Sugar Suite Installation and Upgrade Guide

Version 4.0.0 Beta

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Table of Contents

Installing Sugar Suite 4.0.0 Beta.....	1
1) Download Sugar Files	1
2) Copy Sugar Files to Web Server	1
3) Sugar Installation Wizard	2
4) Login to Sugar!.....	5
Upgrading to Sugar Suite 4.0.0 Beta	5
Important Upgrade Information.....	5
Upgrade Procedure.....	6

Installing Sugar Suite 4.0.0 Beta

This Guide describes how to install and upgrade to Sugar Suite 4.0.0. 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 4.0.0 Beta, the following components must also be installed on your server:

- Apache Web server (v1.3 or v2.0) *or* Microsoft IIS
- MySQL (v4.0, v4.1)
- PHP (v4.3+)

See the Sugar Suite 4.0 Beta Release Notes for a complete list of the supported software versions.

1) Download Sugar Files

Visit <http://www.sugarforge.org/content/downloads/> and download the latest Sugar Suite files.

2) Copy Sugar Files to Web Server

Once you've downloaded Sugar (e.g., *SugarSuite-4.0.0-Beta.zip*), you'll need to 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 the webroot include:

/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*)

Unzip the Sugar Suite zip file into your webroot. A directory (e.g., *SugarSuite-Full-4.0.0-Beta*) should be created within the webroot. You may rename this directory to your liking.

You now need to set permissions on your Sugar files. The following directories and all subdirectories/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.

3) Sugar Installation Wizard

Once you've copied the Sugar files into your webroot, you can now begin to use the Sugar Installation Wizard.

The *<webroot>/SugarSuite-Full-4.0.0-Beta/* directory on your server now corresponds to the Sugar URL you may use to access the Installation Wizard.

In your web browser, visit *http://yourServer/yourSugarDirectory/* (e.g. *http://localhost/SugarSuite-Full-4.0.0-Beta/*). You should now be redirected to the Installation Wizard.

First, click **Start** to begin.

Step 1: License Acceptance

Please review the Sugar Public License and check "I Accept" to continue. Click **Next** when you are finished.

Step 2: System Check Acceptance

In this step, Sugar checks a number of dependencies and system requirements:

- **PHP Version 4.3.x or newer**
Is your PHP version 4.3.x or newer?
- **MySQL Database**
Is MySQL configured to work with PHP correctly?
- **XML Parsing**
Is the PHP/XML Parsing extension available?
- **cURL Library**
Is the cURL Library included in your PHP installation?
- **Writable SugarCRM Configuration File**
Is config.php in your Sugar directory writable by your web server user?
- **Writable Custom Directory**
Is your custom directory writable by your web server user?
- **Writable Modules Sub-Directories and Files**
Is your modules directory writable by your web server user?
- **Writable Data Sub-Directories**
Is your data directory writable by your web server user?
- **Writable Cache Sub-Directories**
Is your cache directory writable by your web server user?
- **Writable Session Save Path**
Is your session save path writable by your web server user? This is defined in your php.ini file as session.save_path.
- **PHP Safe Mode**
Is the PHP Safe Mode setting turned off?
- **PHP Allow Call Time Pass By Reference**
Is the PHP Allow Call Time Pass By Reference setting turned on?
- **PHP Register Long Arrays**
Are the PHP Register Long Arrays setting turned on?
- **PHP Memory Limit >= 10M**
*Is your memory_limit setting in php.ini more than 10M? **Note** that this value does not apply to Windows.*

If all these checks pass successfully, you will be allowed to click **Next** and proceed to the next step.

Step 3: Database Configuration

In this step, Sugar configures its database information. You may also choose to populate demo data in this step.

- **Host Name**
Your MySQL hostname— this can normally be set to localhost if your database server is running on the same machine as your web server.
- **Database Name**
*Your MySQL database name—if you have not yet created a database for Sugar using a MySQL database administration tool, check "Create Database" and Sugar will create a database for you. **Note** to create the database, you will need a MySQL database user name and password that has administrator-level privileges.*
- **User Name for SugarCRM**
Your MySQL username— if you have not yet created a user for Sugar using a MySQL database administration tool, check "Create user" and Sugar will create a database

user for you. **Note** to create the user, you will need a MySQL database user name and password that has administrator-level privileges.

- **Password for SugarCRM**
Your MySQL password for the above username.
- **Drop and recreate existing SugarCRM tables?**
Checking this box will drop and recreate any existing Sugar tables in the specified database, clearing existing data.
- **Populate database with demo data?**
Checking this box will tell the installer to populate demo data; good for testing and demonstrations.
- **Database account above is a privileged user?**
Check this box if the above MySQL user has access to drop/create tables, and create databases/users (if applicable); otherwise, uncheck it and enter a user with the necessary access below.
- **Privileged Database User Name**
This MySQL user must have administrator-level access to drop/create tables, and create databases/users (if applicable).
- **Privileged Database User Password**
Your MySQL password for the above privileged user.

Step 4: Site Configuration

In this step, you may set your Sugar URL, admin password, and other miscellaneous options.

- **URL**
Your Sugar URL— normally you can use the default value
- **SugarCRM admin password**
Set your Sugar admin password— this will be used to login to the admin account
- **Enable Sugar updates?**
Check this box to receive notifications when a new version of Sugar is available. Anonymous usage statistics will also be sent to Sugar periodically.
- **Use defaults? (Advanced Site Security)**
Uncheck this box if you would like to modify the default security options. You can change your session directory, your log directory, and your application ID here
- **Use a Custom Session Directory for SugarCRM**
Check this box to enter a custom session directory— your Sugar session files will be stored here. Make sure your web server user has access to read/write to this directory. This provides added security for shared web servers and hosting accounts.
- **Use a Custom Log Directory**
Check this box to enter a custom log directory— by default, logs are stored in the main Sugar directory. If you would like to store them elsewhere, specify a directory below
- **Provide your Own Application ID**
Check this box to enter a custom application ID. The application ID helps differentiate your Sugar installation from others on the same server. By default, a unique application ID is generated.
- **Application ID**
Specify a custom application ID here

Step 5: Confirm Settings

Please review the settings you have provided to the Installation Wizard. If you want to make any changes, you can click the **Back** button to visit a previous step. Otherwise, click **Next** to perform the setup.

Step 6: Perform Setup

Sugar attempts to install itself with the settings you have provided. First, 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. You can then cut and paste these values directly into your *config.php* file.

Then, the primary database tables are created. Next, relationship tables are added and demo data is installed, if you have chosen to do so. At this point, the installer is locked so it cannot be run again via the *installer_locked* setting in the *config.php* file. Click **Next** to continue.

Step 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 login screen.

If you choose not to register, click **Finish** to proceed to the login screen.

4) Login to Sugar!

You may now login to Sugar with the username admin and the password you entered during Step 4 of the Installation Wizard (“SugarCRM admin password”). At this point, you can configure users and do other administrative tasks. See the Sugar Suite Version 4.0 Beta User and Administrator Guide for more information.

Upgrading to Sugar Suite 4.0.0 Beta

The following document outlines the steps necessary to upgrade from version 3.5.1x of Sugar Suite to the 4.0.0 Beta release. Please do NOT upgrade your production system to Sugar Suite 4.0.0 Beta. Upgrade to Sugar Suite 4.0.0 Beta only on a test instance. We recommend that you run the upgrade process on a copy of your production system

Note that there will NOT be an upgrade path from 4.0.0 Beta to 4.0.0 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 4.0.0 Beta. The Upgrade Wizard includes critical upgrade logic as well as the SQL commands needed to upgrade to Sugar Suite 4.0.0 Beta.
- 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 4.0.0. 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.

Upgrade Procedure

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

1. Download the zipped Sugar Suite 4.0.0 Beta upgrade file.
2. Login as **admin**.
3. Click on **admin** on the top-right.
4. Click on Upgrade Wizard.
5. Upload the zip file.
6. Click on the install button.
7. 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, then you will need to manually merge in the changes by hand after the upgrade process finishes.
8. Click on Commit when you are ready to start the upgrade process.
9. 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.
10. If you had un-checked any files to prevent the Upgrade Wizard from overwriting, you may now manually merge the files by extracting the skipped file from the patch zip file and merging with the file installed in the Sugar application directory.

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