



Sugar Upgrade Guide

Version 5.0



BREAK AWAY

Sugar Upgrade Guide
Version 5.0, 2008

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Preface

Welcome to Sugar, an open source Customer Relationship Management (CRM) application.

Sugar enables organizations to efficiently organize, populate, and maintain information on all aspects of their customer relationships. It provides integrated management of corporate information on customer accounts and contacts, sales leads and opportunities, plus activities such as calls, meetings, and assigned tasks. The system seamlessly blends all of the functionality required to manage information on many aspects of your business into an intuitive and user-friendly graphical interface.

The system also offers a graphical dashboard to track the sales pipeline, the most successful lead sources, and the month-by-month outcomes for opportunities in the pipeline.

Sugar is based on an open source project, and therefore, advances quickly through the development and contribution of new features by its supporting community.

Sugar Enterprise is a commercially licensed and supported version of the Sugar software that includes many features not released in the Sugar Community Edition.

Welcome to the community!

Audience

The *Sugar Upgrade Guide* is designed for administrators who want to upgrade to the latest version of the Sugar application.

Overview

Sugar consists of modules, each of which represents a specific functional aspect of CRM such as Accounts, Activities, Leads, and Opportunities. For example, the Accounts module enables you to create and manage customer accounts, and the Activities module enables you to create and manage activities related to accounts, opportunities, etc. These modules are designed to help you manage customer accounts through each step of their lifecycle, starting with generating and qualifying leads to customer support and resolving reported bugs. Because many of these steps are

interrelated, each module displays related information. For example, when you view the details of a particular account, the system also displays the related contacts, activities, opportunities, and bugs. You can not only view and edit this information but also create new information.

As an administrator, you have the power to implement access control for these modules. You can customize the look and feel of Sugar across your organization. You can even create new modules if needed. You can also create multiple forums as platforms of discussion on various topics amongst your users and customers.

Related Documentation

Refer to the following guides for related information:

- *Sugar Enterprise User Guide, Sugar Professional User Guide, and Community Edition User Guide*: Describes how to use Sugar modules.
- *Sugar Enterprise Installation and Administration Guide, Sugar Professional Installation and Administration Guide, Sugar Community Edition Installation and Administration Guide*: Describes how to install Sugar and perform administrative tasks.
- *Sugar Offline Client Installation Guide*: Describe how to install and use the Sugar Offline Client.
- *Sugar Plug-in for Microsoft Word*: Describes how to install and use the Sugar Plug-in for Microsoft Word.
- *Sugar Plug-in for Microsoft Outlook*: Describes how to install and use the Sugar Plug-in for Microsoft Outlook.
- *Sugar Plug-in for Mozilla Thunderbird*: Describes how to install and use the Sugar Plug-in for Mozilla Thunderbird.
- *SugarPortal Installation and User Guide*: Describes how to install and use SugarPortal to view, edit, and create objects in Sugar Enterprise and Sugar Professional.

Upgrading Sugar

This document describes how to upgrade from Sugar 4.5.1x to Sugar version 5.0x.

In order to upgrade your Sugar application, you need to download the appropriate Upgrade zip file from the Sugar Web site to your local machine. For Sugar Enterprise and Sugar Professional, you can obtain the Upgrade zip file from the Sugar Support Portal at <https://www.sugarcrm.com/crm/support> and upload it to your local machine. For Sugar Community Edition, you can upload the Upgrade zip file from the SugarCRM Web site.

You can upgrade to Sugar 5.0x using the Upgrade Wizard or the Silent Upgrader. To use the Upgrade Wizard, you need to log into the Sugar application. To use the Silent Upgrader, you need to run a PHP script from the command line on the server where the Sugar instance is installed.

Note: It is strongly recommended that you run the upgrade process on a copy of your production system.

If you are using Zend Core 2.0, you will need to increase the default value of the parameters listed below before you begin the upgrade process:

- a. Navigate to *C:\Program Files\Zend\Core\etc\fastcgi.conf* and increase the default value for *ConnectionTimeout* to 3000 and *RequestTimeout* to 6000.
- b. Navigate to the *php.ini* file and increase the default value of *max_execution_time* to 6000.

Compatibility Matrix for Upgrade]

PHP versions	4.4.4 and higher
Databases	MySQL, MSSQL, and Oracle (Oracle is supported only for Sugar Enterprise)
Operating systems	Windows, Linux

Important Upgrade Information

- Backup your system before beginning the upgrade process. It is imperative to backup your current Sugar directory and database.

- Because the Sugar Upgrade file is large, before starting the upgrade process, navigate to the *php.ini* file on your system and configure the parameters listed below as follows:
 - Set *post_max_size* to more than 20MB.
 - Set *upload_max_filesize* settings to more than 20MB.
 - Set *max_input_time* to a large number.

Restart the Web Server and then begin the upgrade process.

- If you are using an Apache Web Server and if you have set *LimitRequestBody* in the *httpd.conf* file, then ensure that you set it to a large number or use the default value of 2GB. Restart Apache and then begin the upgrade process.
- Ensure that the *WebsERVER user* has Write permissions to the Sugar database. The upgrade to SugarCRM 5.0 will add and replace files in several locations including the sugar root directory. The *WebsERVER user* must have Write permissions for the root folder and all sub-directories during the upgrade process.
- The process of upgrading can take up to an hour. If you are using the IIS Web server, you need to ensure that the CGI application does not time out. To do this, on IIS, set the CGI script timeout to more than 300 seconds, which is the default value.
- On MYSQL, the upgrade process will change the data types of three columns (Description, Description_HTML, and Raw_Source) in the Emails table. Therefore, depending on the size of your Email table and the abilities of your database server the upgrade may take longer than usual.
- If you have implemented Campaign Management in your 4.5.1 release, you must ensure that queued emails from existing Email marketing campaigns have run to completion before upgrading to 5.0. Navigate to Admin > Manage Email Queue to check whether the queue is empty. If any items are in the queue, click **Send Queued Campaign Emails** to process those items.
- Sugar 5.0 includes the following changes. Some of these changes can impact customizations made in 4.5.1x:
 - Page layouts for List View, Detail View, Edit View, and the Search Form have been changed. Some fields have been removed while other fields have been consolidated into one field. For example, in the Edit View, Address fields such as City, State, Country, and Zip have been grouped together with the Street field. Therefore, any customizations that you made to Address fields within the Address panel will not be saved during the upgrade process. However, if you moved the individual Address fields outside the Address panel, then any customizations that you made to those fields will be saved during the upgrade process.
 - Some default label names have changed. For example, in the Accounts module, “Name” has changed to “Account Name”, “Date Created” has changed to “Date Entered”, and so on. Customizations to label names will not be saved during the upgrade process.
 - Several modules have been altered to include buttons that reflect new functionality.

- Customizations to Mass Update forms in 4.5.1x are not saved during the upgrade to 5.0.
- Customizations to page layouts in 4.5.1x are not saved during the upgrade to 5.0.
- The Saved Search option has been removed from the Shortcuts menu.

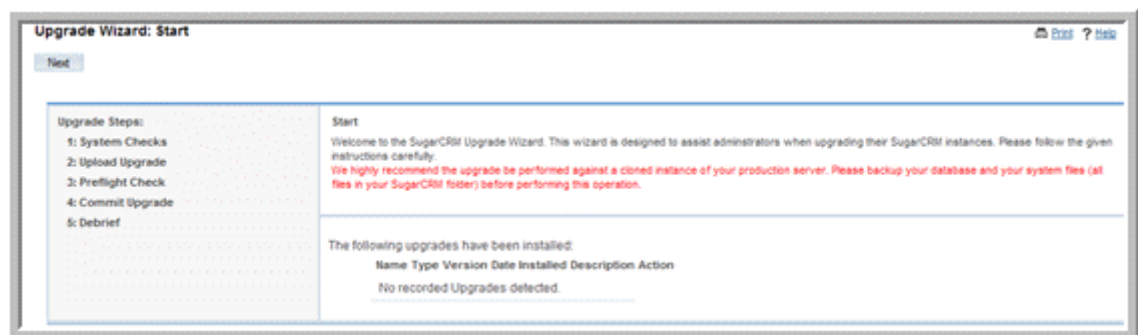
Using the Upgrade Wizard

The Upgrade Wizard includes critical upgrade logic as well as the SQL commands needed to upgrade to Sugar 5.0.

Note: Attempting to manually upgrade by simply replacing files and running the upgrade SQL is not supported.

To upgrade Sugar using the Upgrade Wizard

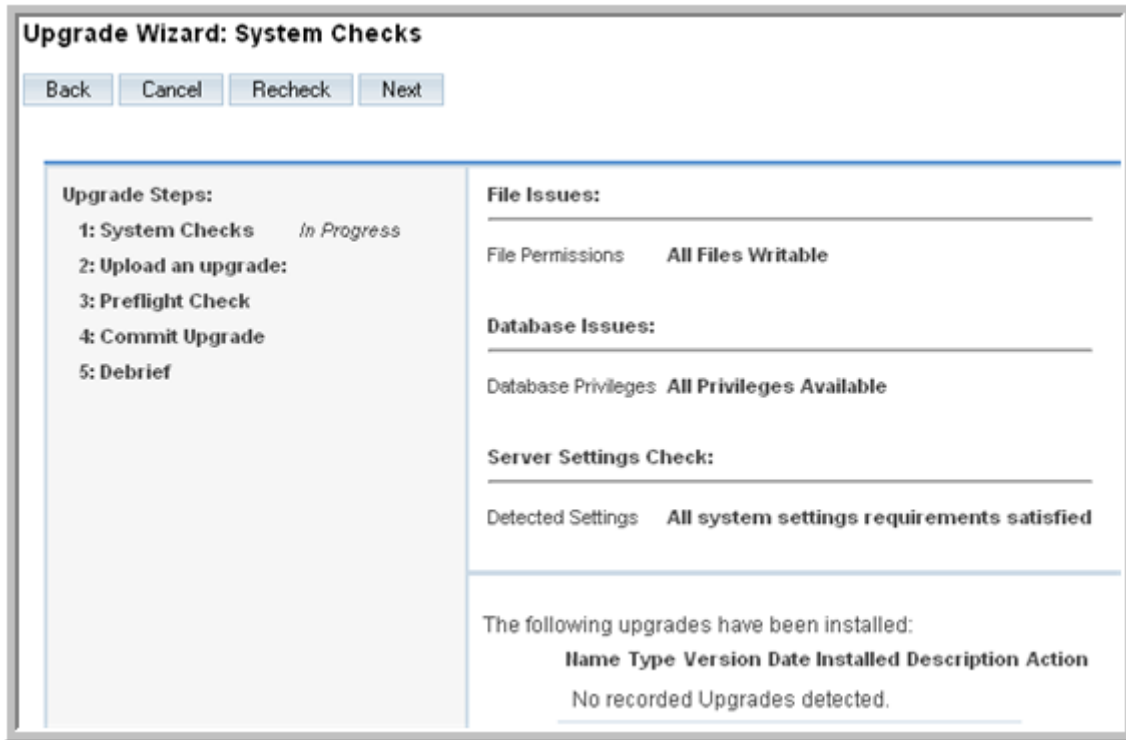
1. Download the appropriate Sugar Upgrade zip file from the Sugar Website to your local machine. For example, to upgrade Sugar Professional, download *SugarPro-Upgrade-4.5.1-to-5.0.0d.zip*.
2. Log into your existing Sugar application as the administrator and click **admin** on the right-hand corner of the page.
3. In the Systems panel of the Administration Home page, click **Upgrade Wizard**.



The Upgrade Wizard screen displays on the page.

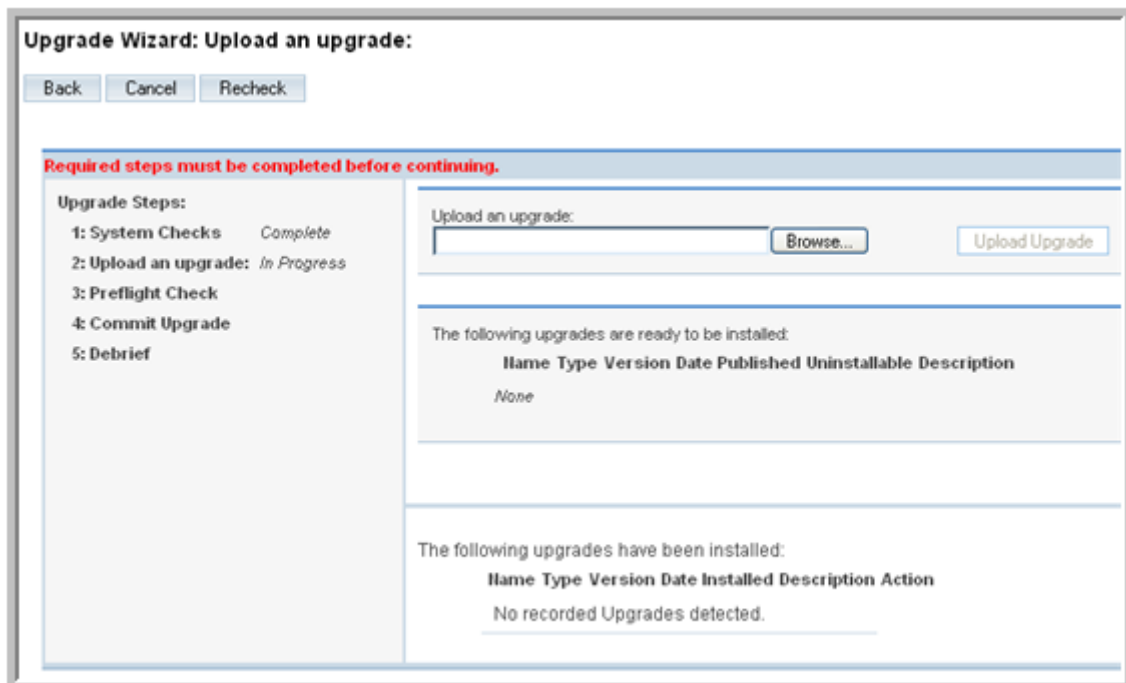
4. Click **Next**.

The System Checks screen displays on the page.



5. Click **Next**.

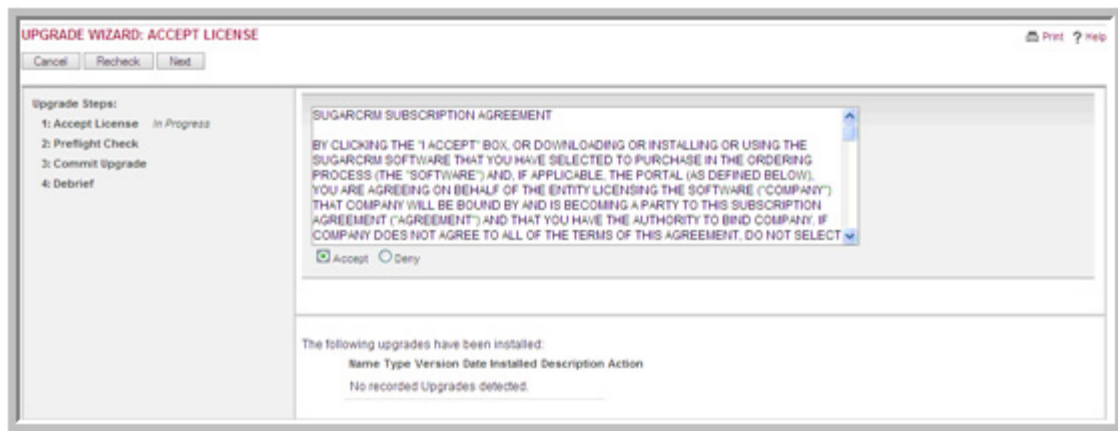
The Upload an Upgrade screen displays on the page.



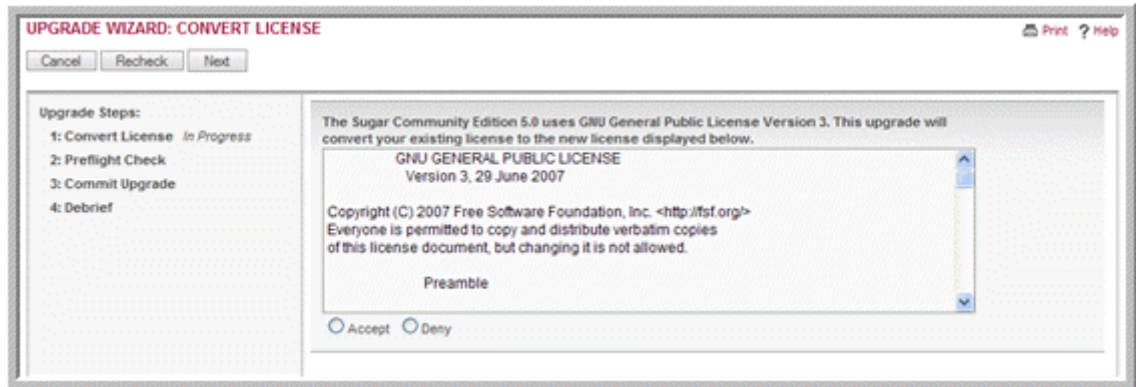
6. Click **Browse**, navigate to the location of the Upgrade zip file, and select it.

The path to the file displays in the Upload an upgrade field.

7. Click **Upload Upgrade** to upload the package to the Sugar application.
The system uploads the package and displays it on the page.
8. Click **Next**.
The Accept License page displays on the screen.
The following screen displays when you upgrade Sugar Enterprise and Sugar Professional.

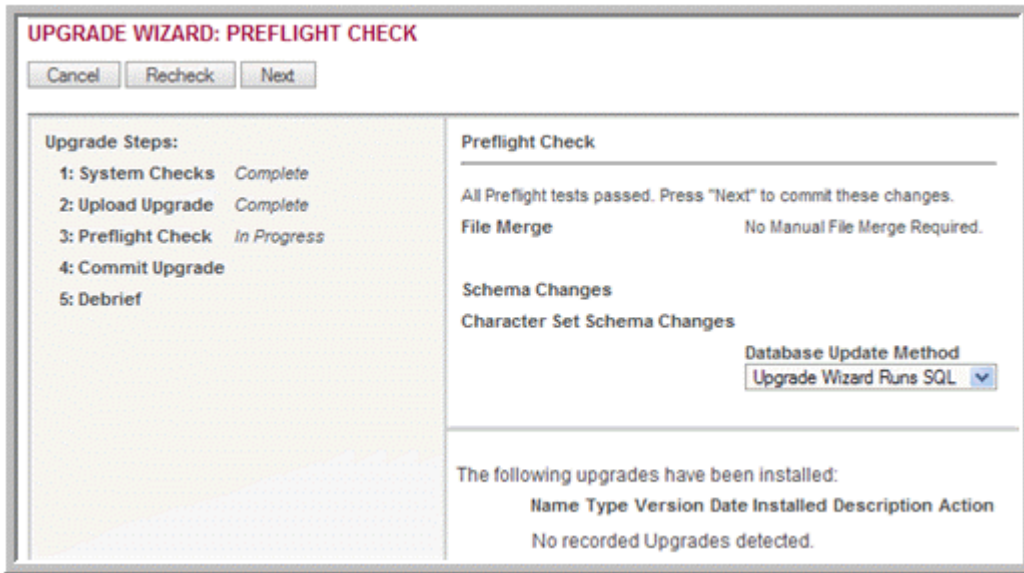


For the Sugar Community Edition, SugarCRM uses the GNU General Public License version 3. The upgrade will convert your existing license to the GNU license.



9. Click **Accept** to continue and click **Next**.

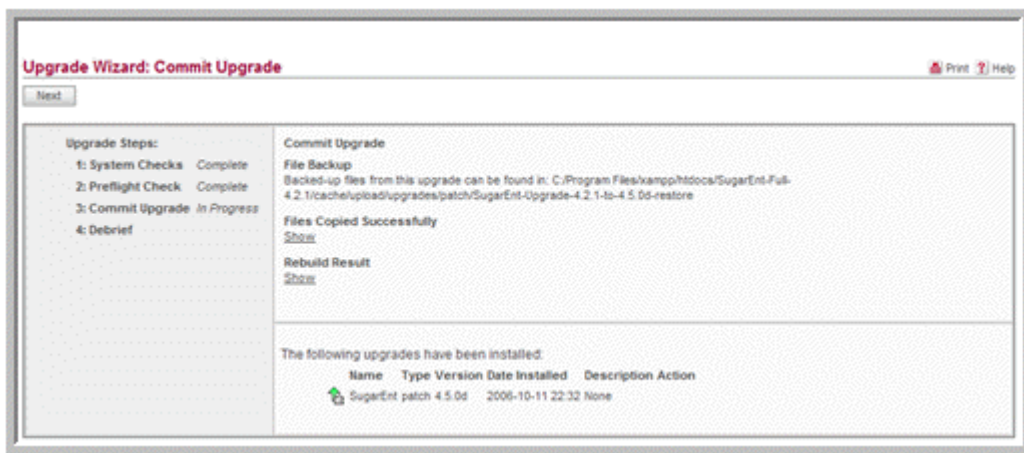
The Preflight Check screen displays on the page.



By default, the Upgrade Wizard Runs SQL option is selected as the database update method. If you ran the SQL queries manually, select **Manual SQL Queries** from the Database Update Method drop-down list and select the **Check when SQL has been manually run** box.

10. Click **Next**.

The Commit Upgrade screen displays on the page.



Optionally, you can click **Show** to see a list of files that were copied and the rebuild results.

11. Click **Next**.

The Debrief screen confirms that the upgrade has been installed.



12. Click **Done**.

The upgrade is now complete.

13. In the Systems panel of the Administration Home page, click **Repair** and select the Rebuild Relationship and Rebuild Extensions options to perform these actions. For more information, see the Installation and Administration Guide that is appropriate for your Sugar application.
14. If you unchecked any files to prevent the Upgrade Wizard from overwriting them, you will have to merge the files manually. Extract the skipped file from the patch zip file and merge with the file that was installed in the Sugar application directory.

Note: If your attempt to upgrade Sugar is unsuccessful, check the *upgradeWizard.log* file in the Sugar folder for information.

Using the Sugar Silent Upgrader

Sugar 5.0x is a major upgrade that requires resources that are sometimes beyond the Web execution environment settings.

The Silent Upgrader enables you to avoid some of the limitations that the Web application environment may have that prevents the Upgrade Wizard from completing the upgrade. The upload size limit (by PHP and sometimes even by Web server), the CGI (or equivalent) timeout limit, and the MySQL (or equivalent) session timeout limit are some of the challenges people run into when upgrading to Sugar 5.0x. The Silent Upgrader either avoids the limitations or better controls the settings in its stand-alone execution environment.

The Silent Upgrader will automatically replace the 4.5.1 database schema with the 5.0 schema.

Note: The *silentUpgrade.php* script creates new files for the user who is running it. For example, for the root user it create files as user/group root. Because Apache cannot read this, you must ensure that the Web server user has the permissions to read and write the script.

To upgrade Sugar using the Silent Upgrader

1. From the command line on the server where the Sugar instance is installed, execute the *silentupgrade.php* script as follows:

```
php -f silentUpgrade.php [upgradeZipFile] [logFile]  
[pathToSugarInstance] [adminUser]
```

where:

upgradeZipFile is the full path to the upgrade zip file. For example, for Sugar Community Edition, use *silentUpgradeCE-5.0.0d.zip*.

logFile is the full path to an alternate log file.

pathToSugarInstance is the full path to the instance being upgraded.

adminUser is a valid admin user name.

Note: After upgrading to Sugar 5.0x, you will need to rebuild the relationship metadata. To do this, log into Sugar as the administrator. On the Administration Home page, select the Repair option in the Systems sub-panel and click Rebuild Relationships.
