



Sugar Upgrade Guide

Version 5.1 Beta 1



BREAK AWAY

Sugar Upgrade Guide
Version 5.1 Beta 1, 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.

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 5.0x to 5.1 Beta 1.

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 to your local machine.

You can upgrade to Sugar 5.1 Beta 1 from 5.0x using the Upgrade Wizard. To use the Upgrade Wizard, you need to log into the Sugar application.

CAUTION: Do not upgrade your production system to 5.1 Beta 1 because you cannot upgrade from 5.1 Beta 1 to 5.1 GA. 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	5.1 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 *Websserver user* has Write permissions to the Sugar database. The upgrade to Sugar 5.1 Beta 1 will add and replace files in several locations including the sugar root directory. The *Websserver 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.
- If you have customized any module's PHP file, for example, *accounts.php*, we strongly recommend that you save it in the Customs directory and not within the main module. This is because, during upgrade, any customizations that you have made may be overridden by changes that Sugar has made for 5.1 Beta 1.

Using the Upgrade Wizard

The Upgrade Wizard provides a quick way to upload and install new Sugar versions as well as upgrade existing ones. The Upgrade Wizard includes critical upgrade logic as well as the SQL commands needed to upgrade to Sugar 5.1.

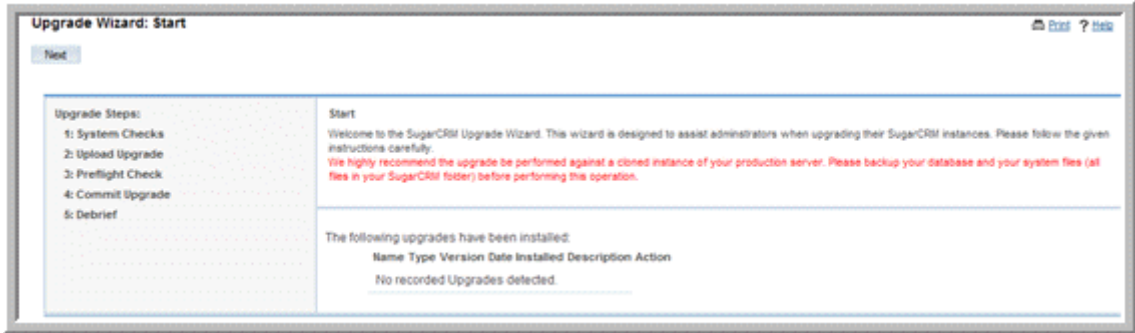
Before using the Upgrade Wizard, ensure that the *config.php* file for your installation is writable.

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 from version 5.0 to 5.1 Beta 1, you need to download the *SugarPro-Upgrade-5.0.0-to-5.1.0 beta1.zip*.
2. Log into your existing Sugar application as the administrator and click **admin** on the right-hand corner of the page.

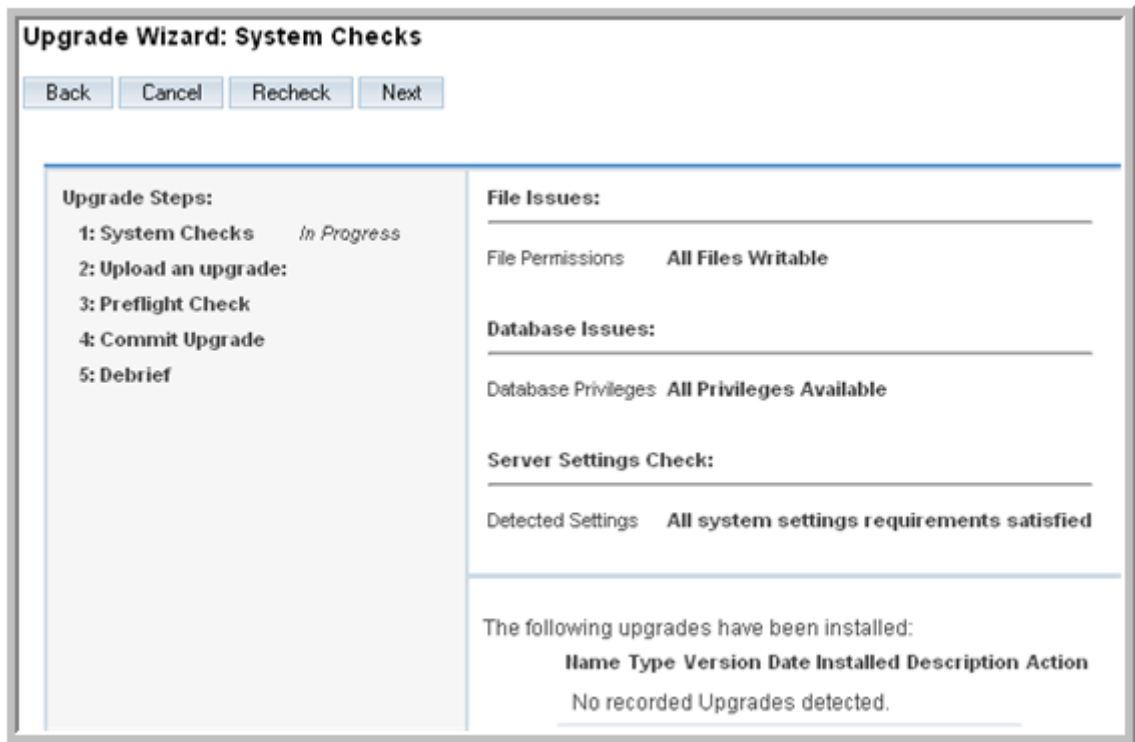
- In the Systems panel of the Administration Home page, click **Upgrade Wizard**.



The Upgrade Wizard screen displays on the page.

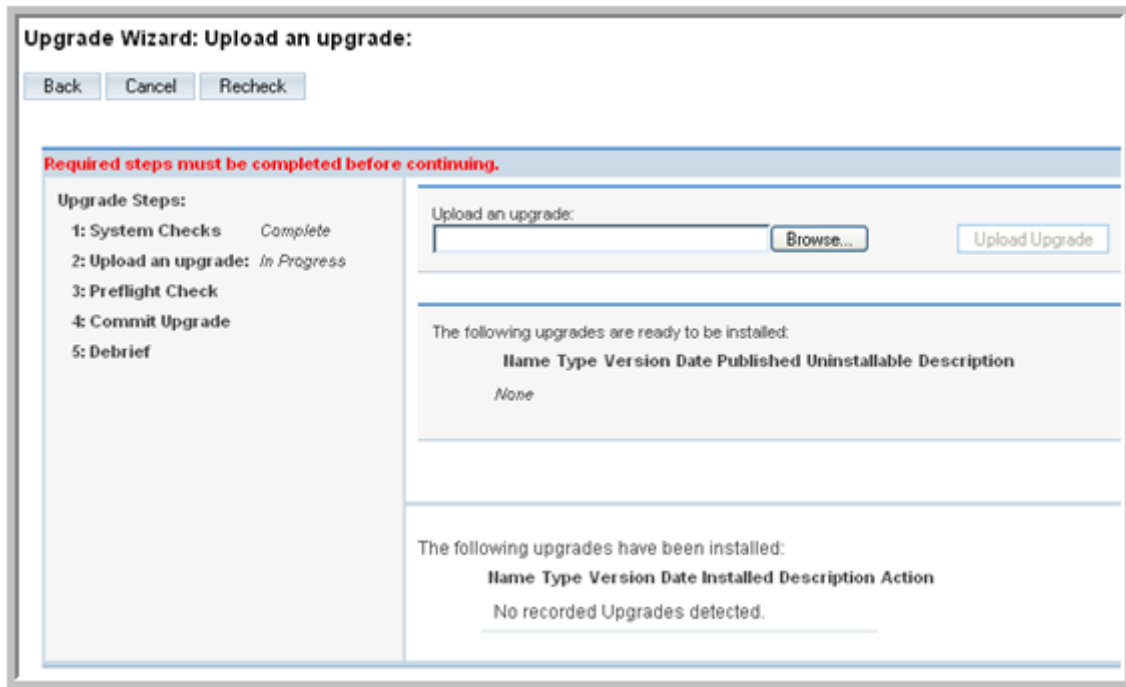
- Click **Next**.

The System Checks screen displays on the page.

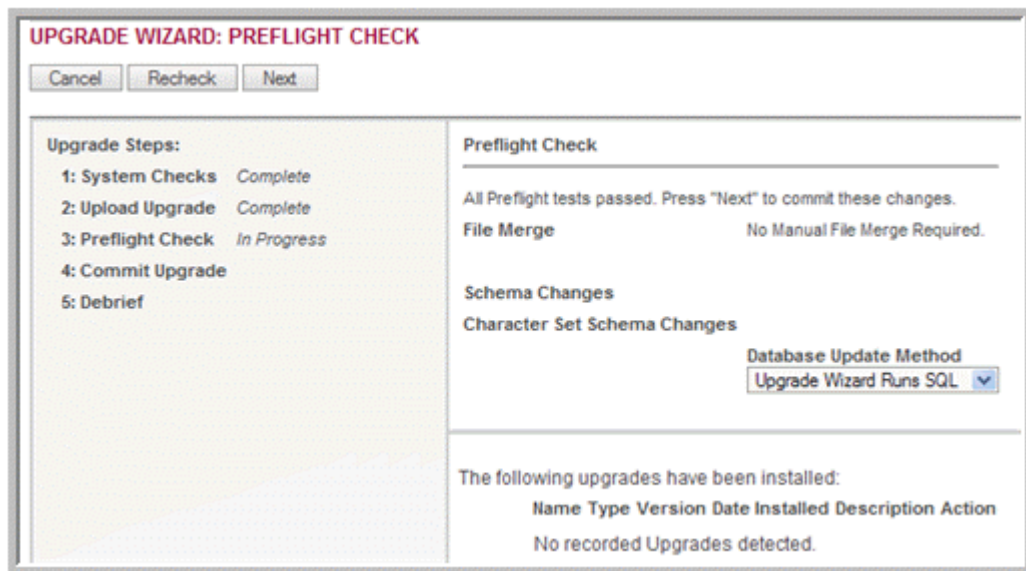


- Click **Next**.

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. Click **Next**. The Preflight Check screen displays on the page.

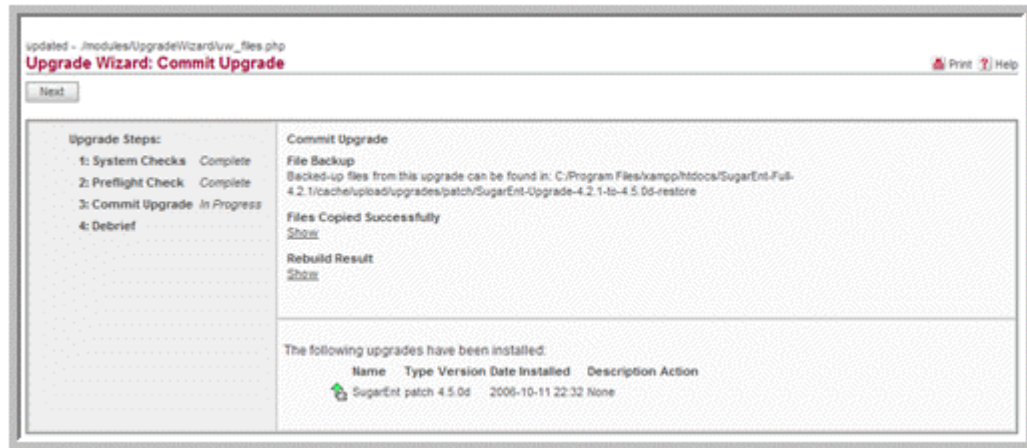


By default, the Upgrade Wizard Runs SQL option is selected as the database update method. If you ran the SQL queries manually, select **Manual SQL**

Queries from the Database Update Method drop-down list and select the **Check when SQL has been manually run** box.

8. Click **Next**.

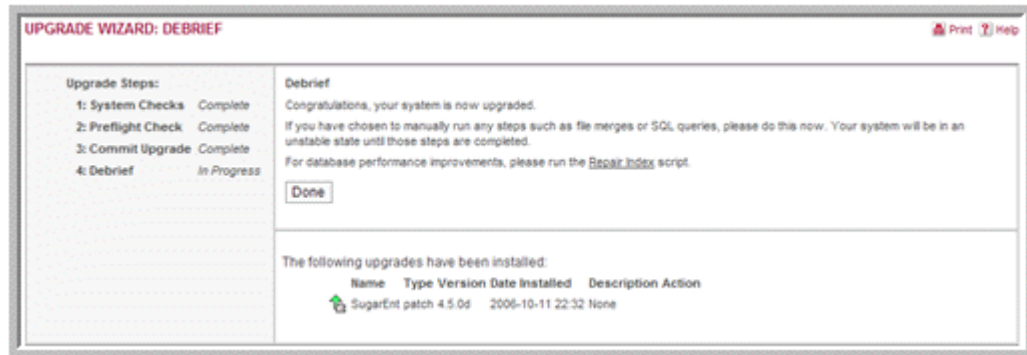
The Commit Upgrade screen displays on the page.



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

9. Click **Next**.

The Debrief screen confirms that the upgrade has been installed.



10. Click **Done**.

The upgrade is now complete.

11. 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 to your Sugar application.
12. If you unchecked any files to prevent the Upgrade Wizard from overwriting then manually merge the files by extracting the skipped file from the patch zip file. Merge 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.

Locking Down the Upgrade Wizard

If you are managing multiple instances of the Sugar application and you want to maintain complete control over the Sugar instances, you can lock down the Upgrade Wizard to ensure that no user with administrative privileges can upgrade any of them. To lock down functions on the Administration page

1. Navigate to the *config.php* file in the Sugar root directory.
2. Set the following parameter to `true` as below:

```
$sugar_config['admin_access_control']=true
```
3. Save the file.