

**SUGARCRM**<sup>™</sup>  
COMMERCIAL OPEN SOURCE

# Sugar Open Source Installation Guide

Version 4.5.1

*Sugar Open Source Installation Guide*  
Version 4.5.1, 2007  
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This document describes how to install and upgrade to Sugar Open Source version 4.5.1 from versions 4.2.1 and 4.5.0.

Topics are as follows:

- [“Installation Prerequisites and Guidelines” on page 1](#)
- [“Installing Sugar Suite” on page 2](#)
- [“Upgrading Sugar Suite” on page 11](#)

This document is intended for administrators. After installation, you can create users and perform other administrative tasks in Sugar. See the *Sugar Open Source Administration Guide* for more information.

To install Sugar Suite 4.5.1, ensure that you have the appropriate components installed on your server. See the *Sugar Open Source Release Notes* for a complete list of the supported software versions.

SugarCRM now offers two licensing options for Sugar Open Source:

- Sugar Public License (SPL), which you can use with MySQL.
- SugarCRM Community License (S-CL), which you can use with MS SQL Server.

The installation screens reflect the license that you purchased. For purposes of illustration, this manual mostly documents the SPL version.

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**Note:** Install the MB String module on your Web server to support multi-byte characters.

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## Installation Prerequisites and Guidelines

Ensure that the following requirements are met before you install Sugar Suite 4.5.1.

- If you are using MySQL, install version 4.1.2 or higher to use with Sugar Suite 4.5.1.
- If you are using SQL server, install and set it up to work with Sugar Suite. For more information, navigate to [www.sugarcrm.com/wiki/Sugar Developer Wiki/Configuration and Installation/Installing SugarCRM with SQL Server](http://www.sugarcrm.com/wiki/Sugar_Developer_Wiki/Configuration_and_Installation/Installing_SugarCRM_with_SQL_Server).
  - In order for Sugar Suite to connect to SQL Server, all Web servers that will run Sugar Suite need to receive an update to one of the Microsoft DLLs. Download *ntwdblib.dll* version 2000.80.194.0 and place it in the system directory of all Web servers running Sugar Suite and connecting to Microsoft SQL Server. After you complete this task, it is recommended that you search each Web server for all copies of *ntwdblib.dll* and rename them to something else, such as *ntwdblib2.dll* to ensure that the correct DLL is loaded.
  - Install PHP and make the following changes:
    - To enable the MS SQL extensions, open up *php.ini* and uncomment the following string:

```
extension=php_mssql.dll
```
    - To enable UTF8 character support, search for the following string:

```
mssql.charset = "ISO-8859-1"
```

and change it to

```
mssql.charset = "UTF-8"
```

---

SugarCRM requires that date strings be retrieved in YYYY-MM-DD hh:mm:ss format. To enable this in SQL Server uncomment the following option and make sure it is set to Off as follows:

```
mssql.datetimeconvert = Off
```

- o When you install Sugar Suite 4.5.1, do the following:
  - In Step 4 of the installation process, check the Host Name entry. If you accepted the default values, then the name will be similar to “server name” + “\SQLEXPRESS”. So assuming your computer name is “foo”, the database hostname is “foo\SQLEXPRESS”.
  - Enter the server name in the first text field (“foo” from the example above) and the instance name in the second tab (“SQLEXPRESS” in the example above).

The rest of the installation process proceeds as usual.

## Installing Sugar Suite

The process of installing Sugar Suite is as follows:

1. Download Sugar Suite files.
2. Copy the Sugar Suite files to your web server, check and set the dependencies and requirements.
3. Install Sugar Suite with the Sugar Setup Wizard.
4. Log into Sugar Suite.

### Step1: Download Sugar Suite Files

To download the latest Sugar Suite files:

1. Go to <http://www.sugarcrm.com/>
2. Log in using your Sugar Suite username and enter the password associated with your account.
3. Click on the Downloads Manager link or visit <http://www.sugarcrm.com/sugarshop/downloads.php>.
4. Enter your download key into Download Key field and click **Submit**.
5. Click the *SugarOS-4.5.1beta.zip* to download it.

### Step 2. Copy Sugar Suite Files to the Web Server

After you download Sugar Suite, you need to unzip the files and set permissions.

1. 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 Web root includes:

*/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)*

2. Unzip the Sugar Suite zip file into your webroot. A directory is automatically created within webroot.
3. Rename this directory at any time.
4. Set permissions on the Sugar Suite files. The following directories, all subdirectories, and files must be made writable by your Web server user:
  - o cache
  - o custom
  - o data
  - o modules
  - o 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:

- o apache (Linux/Apache)
- o nobody (Linux/Apache)
- o IUSR\_computerName (Windows/IIS)

If you are unsure of your Web server user, consult your system administrator.

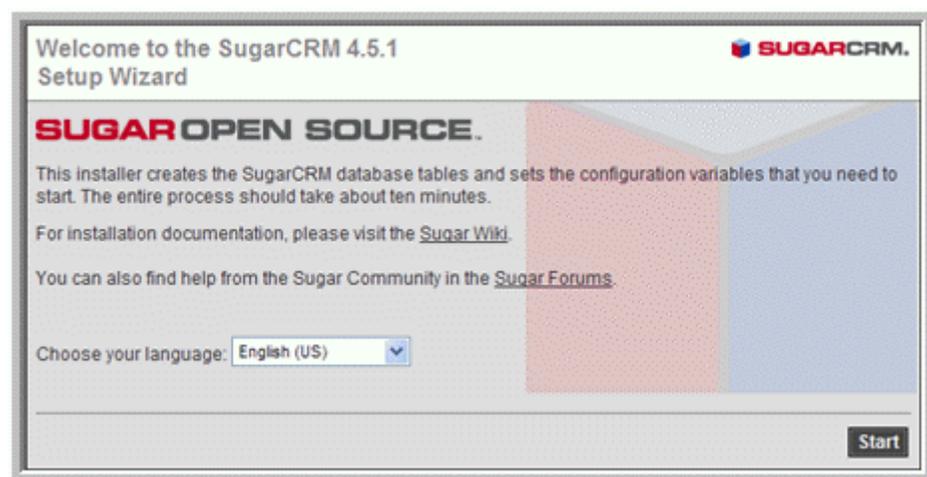
### Step 3. Install Sugar Suite

After you copy the Sugar Suite files into your Web root, you can use the Sugar Setup Wizard. The `http://<yourServer>/<yourSugarDirectory>` on your server corresponds to the Sugar URL that you will use to access the Setup Wizard.

For example: `http://localhost/SugarSuite-Full_4.5.0`

#### To install Sugar Suite

1. Launch the browser and enter the URL described above.  
You are redirected to the Sugar Setup Wizard.
2. Click **Start** to begin.



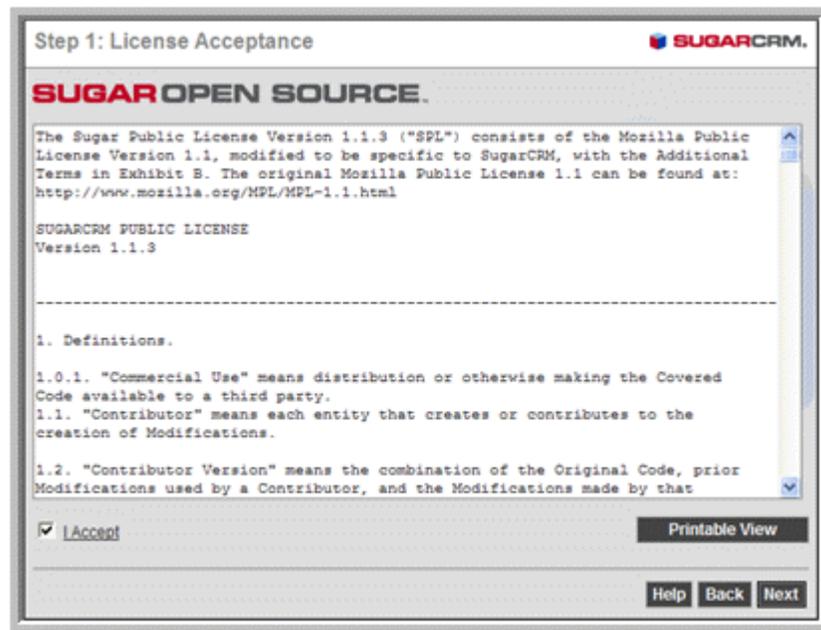
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**Note:** At any time prior to accepting the Confirm Setting menu, you can modify any of your settings. To modify any settings, click the **Back** button.

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For locales that use a character set other than UTF8 or CP1252, you will have to define an export/import character set under System Settings in Sugar Suite. For more information, see the *Sugar Open Source Administration Guide*.

The License Acceptance screen displays.



3. Review the Sugar PublicLicense, check “I Accept”, and click **Next**.

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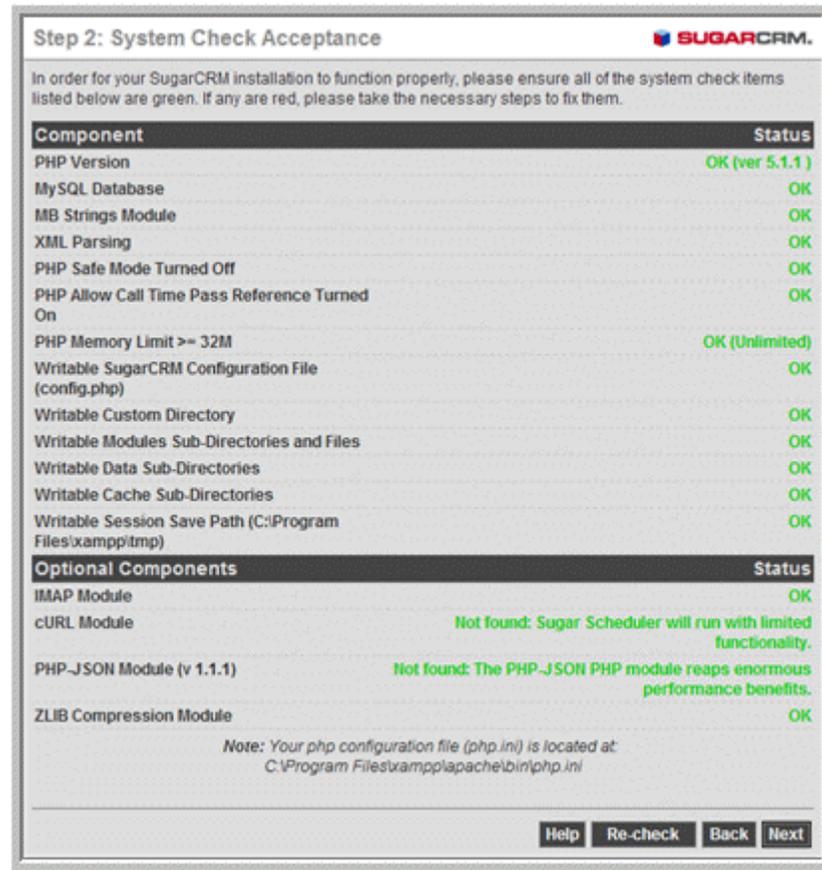
**Note:** If you choose MySQL, see “[Installation Prerequisites and Guidelines](#)” on [page 1](#) to set it up for Sugar Suite.

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The System Check Acceptance screen displays. Sugar Suite checks for dependencies and system requirements as listed below:

- Your database must be configured to work with PHP.
- The cURL Library must be included in your PHP installation.
- The session\_save\_path setting defined in your php.ini file. The memory\_limit setting value (php.ini file) does not apply to Windows.
- For the BitRock installer, the MB module is available but is disabled. To enable it, navigate to the location where you installed BitRock, open the *php.ini* file, and uncomment the *mbstring.dll* module.

If any components are not set correctly or available, its status displays the message in red. Cancel out of the installation and correct the dependency. .



4. If all these checks pass successfully, the installer displays the Next button. Click **Next**.

The Database Configuration screen displays. You can also populate the Sugar Suite demo data in this step. If you are installing Sugar Suite with the Sugar Public License (SPL), and if your database server is running on the same machine as your Web server, the host name is typically set to *localhost*. If you do not have a database name or user name, Sugar Suite allows you to create them at this time. Ensure that the user has administrative privileges.

The following screenshot illustrates the Database Configuration screen that displays for the SPL license. If you are installing with the SugarCRM Community

License (S-CL), in the Host Name field, enter the name of the machine where you installed SQL Express.

**Step 3: Database Configuration** SUGARCRM.

Please enter your database configuration information below. If you are unsure of what to fill in, we suggest that you use the default values.

**\* Required field**

**Database Configuration**

\* Host Name / Host Instance: localhost

\* Database Name: sugarcrm61  Create Database

\* Database Username: sugarcrm  Create User

Database Password: [empty]

Drop and Recreate Existing Sugar tables?   
*Caution: All Sugar data will be erased if this box is checked.*

Populate Database with Demo Data?

Database Account Above Is a Privileged User?

Help Back Next

The following screenshot illustrates the Database Configuration screen that displays for S-CL.

**Step 3: Database Configuration** SUGARCRM.

Please enter your database configuration information below. If you are unsure of what to fill in, we suggest that you use the default values.

**\* Required field**

**Database Configuration**

\* Host Name / Host Instance: sqlexpress

\* Database Name: scl450  Create Database

\* Database Username: sugar  Create User

Database Password: .....

Drop and Recreate Existing Sugar tables?   
*Caution: All Sugar data will be erased if this box is checked.*

Populate Database with Demo Data?

Use multi-byte text in demo data?

Database Account Above Is a Privileged User?

Help Back Next

5. Click **Next**.

The Site Configuration screen displays. The Site Configuration menu allows you to set options specific to the Sugar installation such as enabling Sugar updates, and setting up advanced site security. The URL setting is your Sugar URL. Normally the default value is used. To customize your session directory, log directory, and application ID, uncheck the advance site security box. A supplemental menu appears below the check box for the advance site security settings.

The screenshot shows the 'Step 4: Site Configuration' window for SugarCRM. It includes a header with the SugarCRM logo and a sub-header 'Step 4: Site Configuration'. Below the header, there is a paragraph of instructions: 'Please enter your site configuration information below. If you are unsure of the fields, we suggest that you use the default values.' A red asterisk indicates a 'Required field'. The form is divided into three sections: 'Site Configuration', 'Sugar Updates Config', and 'Advanced Site Security'. The 'Site Configuration' section contains four fields: 'URL of Sugar Instance' (http://localhost/SugarOS-Full-4.5.1beta), 'System Name' (localhost), 'Sugar Admin Password' (masked with dots), and 'Re-enter Sugar Admin Password' (masked with dots). The 'Sugar Updates Config' section has two checkboxes: 'Send Anonymous Usage Statistics?' (checked) and 'Automatically Check For Updates?' (checked). The 'Advanced Site Security' section has one checkbox: 'Use Defaults?' (checked). At the bottom right, there are three buttons: 'Help', 'Back', and 'Next'.

Step 4: Site Configuration **SUGARCRM.**

Please enter your site configuration information below. If you are unsure of the fields, we suggest that you use the default values.

\* Required field

**Site Configuration**

\* URL of Sugar Instance

\* System Name  
*This will be displayed in the Title Bar of users who visit this SugarCRM installation*

\* Sugar Admin Password  
*Caution: This will override the admin password of any previous installation.*

\* Re-enter Sugar Admin Password

**Sugar Updates Config**

Send Anonymous Usage Statistics?   
*If checked, Sugar will send anonymous statistics about your installation to SugarCRM Inc. every time your system checks for new versions. This information will help us better understand how the application is used and guide improvements to the product.*

Automatically Check For Updates?   
*If checked, the system will periodically check to see if updated versions of the application are available.*

**Advanced Site Security**

Use Defaults?

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6. Set your Sugar Suite URL, administrator password, and other miscellaneous options, and click **Next**.

The Locale Settings & Language Pack screen displays.

**Step 5: Locale Settings & Language Pack** SUGARCRM.

If you would like to install a language pack other than the default of US-English, please do so below. Otherwise, click "Next" to continue to the next step.

### Locale Settings

Adjust your SugarCRM Locale settings below.

**User Interface**

Default Date Format: 2006-12-23

Default Time Format: 23:00

Default Language: US English

Default Name Format: s f l

"s" Salutation  
"F" First Name  
"L" Last Name

**Outbound Email Character Set**

Set this to the character set most commonly used in your locale: ISO-8859-1 (Western European and US)

**Export Settings**

Import/Export Character Set (Email, .csv, vCard, PDF, data import): CP1252 (MS Western European & US)

Export (.csv) Delimiter:

**Currency Settings**

Default Currency: US Dollars \$ USD

Significant Digits: 2

1000s Separator:

Decimal Separator:

Example:

Help Back Next

7. Enter the system-wide default settings for the date, time, name, language, and salutation and click **Next**.

**Note:** To change the default language from US English to another language, you must install the appropriate language pack.

The **Confirm Settings** screen displays all the configurations that you specified.

8. Check the settings carefully and click **Next**.

9. If you need to change it, click the **Back** button to navigate to the screen you want.

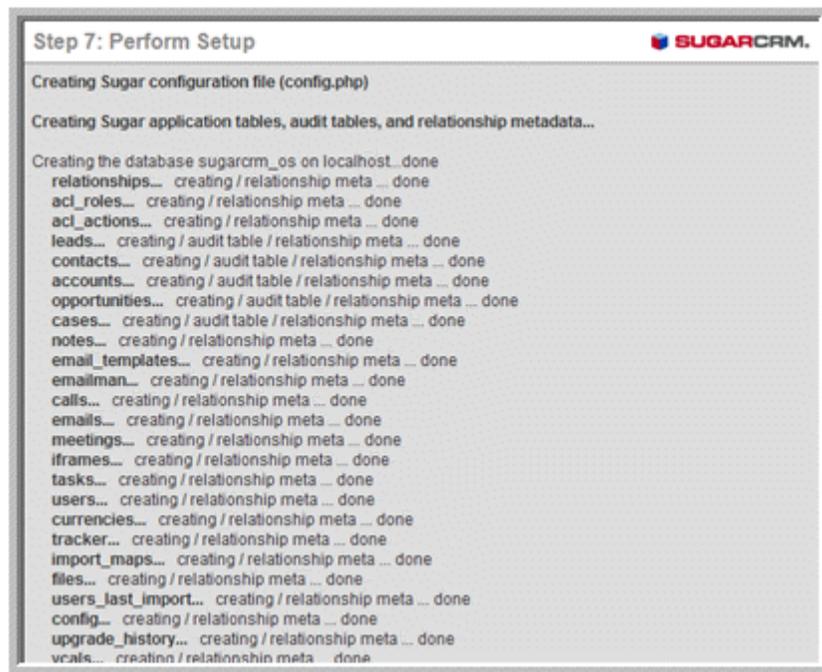
**Step 6: Confirm Settings** 

Please confirm the settings below. If you would like to change any of the values, click "Back" to edit. Otherwise, click "Next" to start the installation.

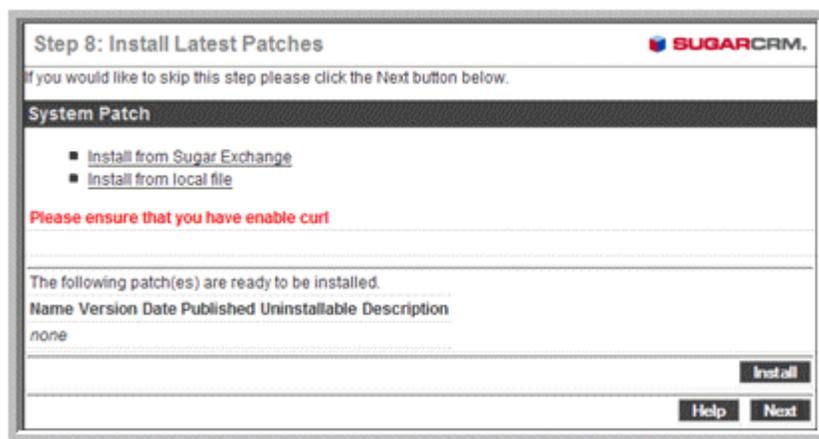
Database Configuration	
Database Name	sugarcrm61 (will be created)
Database Username	root (will not be created)
Drop and Recreate Existing Sugar tables?	No
Populate Database with Demo Data?	No
Privileged Database User Name	root
Site Configuration	
URL of Sugar Instance	http://localhost/SugarOS-Full-4.5.1beta
Sugar Updates Config	
Automatically Check For Updates?	Yes
Advanced Site Security	
Use a Custom Session Directory for Sugar?	No
Use a Custom Log Directory?	No
Provide Your Own Application ID?	No
Locale Settings	
Default Date Format:	2006-12-23
Default Time Format:	23:00
Default Language:	US English
Default Name Format:	David Livingstone
Import/Export Character Set (Email, .csv, vCard, PDF, data import):	CP1252
Export (.csv) Delimiter:	,
Default Currency:	US Dollars
Currency Symbol:	\$
Currency Code (ISO 4217):	USD
1000s Separator:	,
Decimal Separator:	.

Help
Back
Next

The Perform Setup screen displays and the installer begins to set up your system.



10. When the setup is complete, click **Next**  
The Install Latest Patches screen displays.



11. To install a patch from the Sugar server, select **Install from Sugar Exchange**. To install a patch that you saved to your local machine, click **Install from local file**.

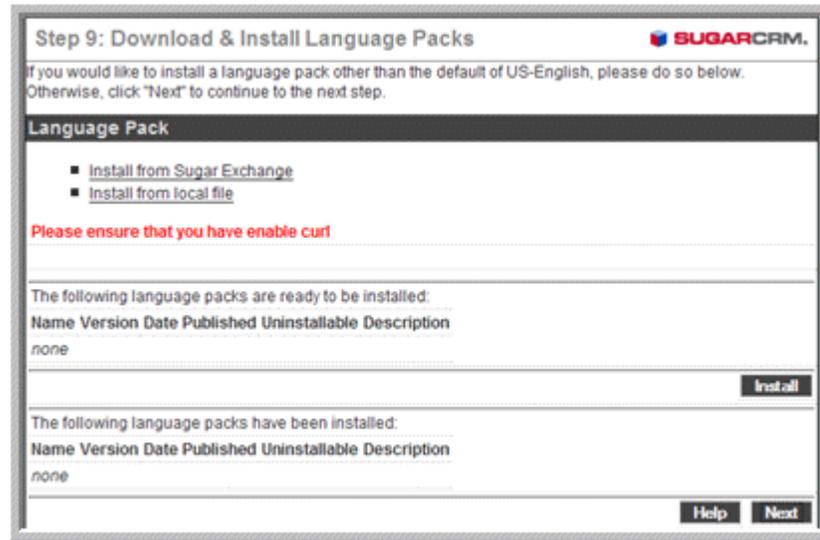
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**Note:** There are no new patches that you can install for 4.5.1.

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12. Click **Next**.

The Download and Install Language Packs screen displays.



13. To install a language pack from the Sugar server, select **Install from Sugar Exchange**. To install a language pack that you saved to your local machine, click **Install from local file**.

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**Note:** Language packs will be available only for 4.5.1 GA.

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14. Click **Next**.

The Registration screen displays.

15. To register your application with SugarCRM, click **Send Registration**. If you choose not to register at this time, click **Finish** to proceed to the login screen.

#### Step 4. Log into Sugar Suite

The Sugar Suite login screen displays. You may now log into Sugar with the username and password you provided the Setup Wizard.

After a successful log in, you can configure users and do other administrative tasks. See the *Sugar Open Source Administration Guide* for more information.

## Upgrading Sugar Suite

This section describes how to upgrade from version 4.2.1 and 4.5.0 to Sugar Suite 4.5.1. It is recommended that you run the upgrade process on a copy of your production system.

#### Important Upgrade Information

- The Upgrade Wizard is the only supported method for upgrading to Sugar Suite 4.5.1. The Upgrade Wizard includes critical upgrade logic as well as the SQL commands needed to upgrade to Sugar Suite 4.5.1.

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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.

- On MYSQL, the upgrade process will change the datatypes 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 4.2.1 release, ensure that queued emails from existing email marketing campaigns have been run to completion before upgrading to 4.5.1. Navigate to Admin > Manage Email Queue to ensure that the queue is empty. If any items are in the queue, click **Send Queued Campaign Emails** 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.

#### **To upgrade to Sugar Suite 4.5.1**

1. Download the SugarSuite Upgrade .zip file.
2. Log into your existing Sugar Suite application as the administrator and click on the **admin** option at the right-hand corner of the page.
3. In the Systems panel of the Administration Home page, click **Upgrade Wizard**, and follow the steps outlined in the System Administration chapter of the *Sugar Open Source Administration Guide*.
4. 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. Click **Return to Upgrade Wizard** to go back to the Upgrade Wizard.
5. You must rebuild the relationships and extensions. Go to the Admin screen and click the **Rebuild Relationship and Rebuild Extensions** links.
6. 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.