Sugar Open Source
Installation Guide

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Installation Guide for Sugar Suite 3.5

This implementation note will guide you through installing Sugar Suite 3.5.1. It is intended for experienced administrators and novices alike. After installation, you can configure users and do other administrative tasks found in Chapter 5 of the Sugar Open Source Version 3.5 User Guide located here.

To install Sugar Suite 3.5.1, the following components must also be installed on your server:
- Apache Web server (v1.3 or v2.0) *or* Microsoft IIS
- MySQL Server (v4.0, v4.1 or v5.0)
- PHP (v4.3+)

See http://www.sugarforge.org/content/getting-started/system-requirements.php for a complete list of system requirements and recommended hardware.

1) Download Sugar Files
Visit http://www.sugarforge.org/projects/sugarcrm/ and download the latest Sugar Suite files. From the above page, click on **Files** and find the *Latest Stable* release.

2) Copy Sugar Files to Web Server
Once you've downloaded Sugar (i.e. *SugarSuite-3.5.1.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 (i.e. *SugarSuite-Full-3.5.*1) 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-3.5.1/* 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-3.5.1/*). 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?
- **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 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 use 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.
- **Path to Session Directory**
  Directory to store your Sugar session files
- **Use a Custom Log Directory**
  Check this box to use 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
- **Log Directory**
  Directory to store your Sugar log files
- **Provide your Own 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 continue.

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 found in Chapter 5 of the Sugar Open Source Version 3.5 User Guide located [here](#).