



Installation Guide for CarouselCRM

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Introduction

What will be covered in this manual

This manual is intended for the system administrator or installer of the CarouselCRM application. If information on the use of the application is required, please download and read the usermanual.pdf file from the SugarExchange site at http://www.sugarexchange.com/product_details.php?product=242

If you have any questions which are not covered in this manual you can contact support@xoetrope.com or visit the forums at http://www.sugarforge.org/forum/?group_id=242

What is CarouselCRM?

CarouselCRM is a Rich internet application which allows SugarCRM users to work with their data more quickly and in a more interactive and responsive mode. CarouselCRM also includes tighter integration with Outlook for Windows allowing users to synchronise their data without having to launch Outlook or switch applications.

CarouselCRM can be downloaded for evaluation from the SugarExchange site at http://www.sugarexchange.com/product_details.php?product=242

The SugarExchange site also contains forums, bug tracking, mailing lists, news and feature requests allowing the project to be followed from a central location.

The XUI platform

CarouselCRM is built on top of the popular XUI platform and because it is Java and XML based it can run cross platform.



More information on XUI can be found at <http://www.xoetrope.com/xui> and <http://www.sourceforge.net/projects/xui>

Current version

The current version of CarouselCRM is 1.0 and beta 2 was released on 14th July 2006. There are more enhancements planned for future versions of the application, but it's important that the first version is stable and usable before proceeding with these enhancements. For more information on what is planned go to <http://www.xoetrope.com/carouselcrm>

Installing the CarouselCRM application on Tomcat

Tomcat versions

CarouselCRM has been tested on versions 4.1, 5.0 and 5.5 of Tomcat. If support for another version of Tomcat or for a different application server or servlet engine is required please contact support@xoetrope.com

Installing CarouselCRM

The easiest way to install CarouselCRM on Tomcat is to place the carouselcrm.war file into the 'webapps' directory under Tomcat making sure that any previous carouselcrm directory has been deleted and restart Tomcat. For more information on installing web applications on Tomcat see the Tomcat deployment documentation for the Tomcat version you are running

Tomcat 4.1	http://tomcat.apache.org/tomcat-4.1-doc/appdev/deployment.html
Tomcat 5.0	http://tomcat.apache.org/tomcat-5.0-doc/deployer-howto.html
Tomcat 5.5	http://tomcat.apache.org/tomcat-5.5-doc/deployer-howto.html

Checking the web application installation

Once installed on Tomcat, the carouselcrm application directory should contain the three JSP files **checkdb.jsp**, **index.jsp** and **troubleshoot.jsp**. If you open a browser and navigate to the index.php file. The file will be located at **http://[tomcatserver:8080]/carouselcrm/index.jsp**. You should see the following screen.



Illustration 1: The CarouselCRM application homepage

This indicates that the application has installed successfully and that the JPS's are being processed correctly. You can now begin setting up the database connections, license files and the correct versions of Xalan.

These steps can be carried out in conjunction with the automated troubleshooting page which can be found at [http://\[tomcatserver:8080\]/carouselcrm/troubleshoot.jsp](http://[tomcatserver:8080]/carouselcrm/troubleshoot.jsp). More on the automated troubleshooting will follow the sections on setting up the server.

Setting the database connections

In the `carouselcrm\WEB-INF\classes` directory you will find the file `carouselservlet.properties`. Open this file in a text editor and you will see the following lines.

```
dburl=jdbc:mysql://[server]/[db]
dbuser=[username]
dbpwd=[password]
```

The `dburl` property needs to be changed to the url which points to your SugarCRM database. It should appear something like `dburl=jdbc:mysql://databaseserver/sugarcrm`. The `dbuser` property needs to be set to the userid of a valid user of the SugarCRM database. The `dbpwd` property needs to be set to the password for the specified user.

Setting up the license file

CarouselCRM can be run with an evaluation license or a full license. In either case a directory for the license file needs to be set in the `carouselservlet.properties` file. Once again open the `carouselservlet.properties` file in a text editor and you will see the following property.

```
licensedirectory=[licensedir]
```

Create a directory for storing the license files and enter the path to the directory in the `licensedirectory` property. Note that on windows the backslash `\` file separator will not work. Alternatively use the forward slash `/` separator or two backslash separators `\\` together.

If an evaluation version of CarouselCRM is going to be run, place a file called `license.properties` in the directory specified in the `licensedirectory` property of the `carouselservlet.properties` file. The contents of the `license.properties` file is...

LicenseType=evaluation

When a SugarCRM user logs on to the application for the first time a new file called **users.properties** will be created which will record the id of the user who first logged into the application. In evaluation mode, only this user is allow to login to CarouselCRM. The users file can be deleted and another user can log in, but the same **users.properties** will be created.

If you want to run a fully licensed version of CarouselCRM you will need to purchase a license from Xoetrope. You can contact sales@xoetrope.com for more information on purchasing a license for CarouselCRM.

Installing the correct version of Xalan

CarouselCRM comes bundled with Xalan version 2.6.0. The xalan.jar file can be found in the **carouselcrm\WEB-INF\lib** directory of the carouselcrm web application directory.

If you want to run Xalan version 2.4.1 you will need to have the serializer jar file available. This file can be obtained from the CarouselCRM project on the SugarExchange site at http://www.sugarexchange.com/product_details.php?product=242

Automated Troubleshooting

The automated troubleshooting page can be located at <http://tomcatserver:8080/carouselcrm/troubleshoot.jsp> and will appear in the browser as below.

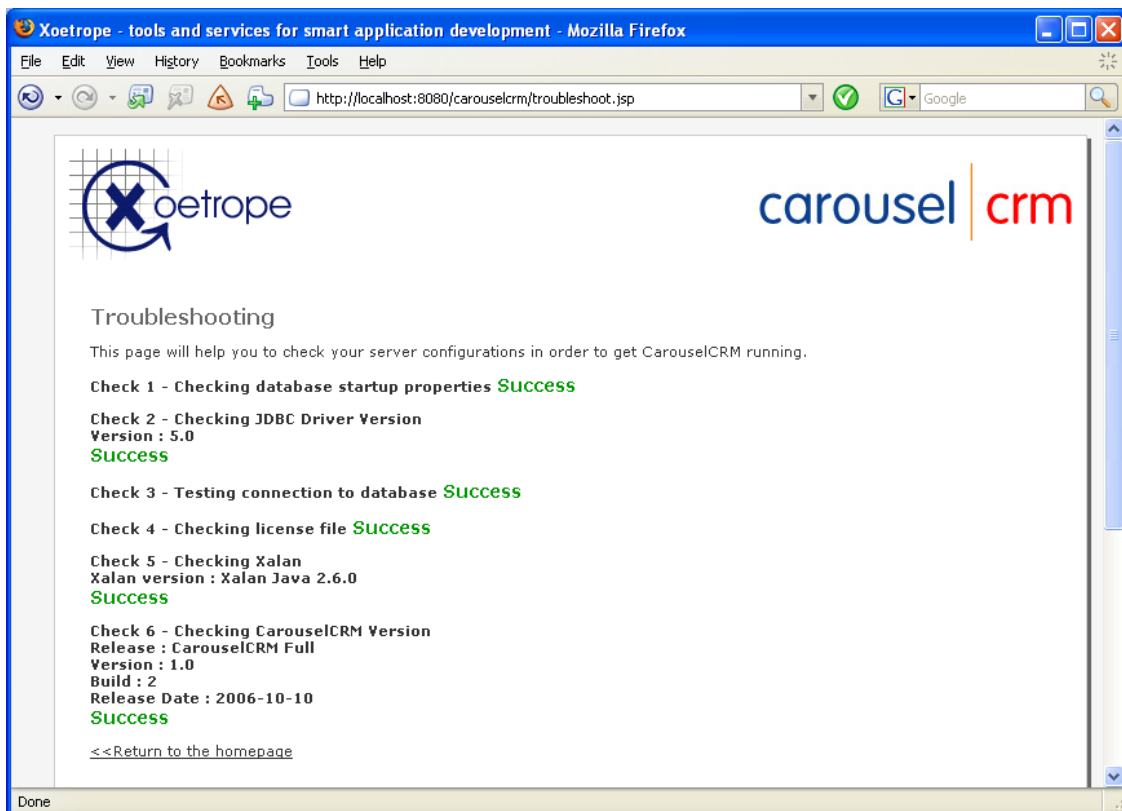


Illustration 2: The CarouselCRM troubleshooting page

The troubleshooter carries out six checks

- That the database properties have been set
- The JDBC Driver version
- That the database can be connected to from the Tomcat server using the credentials in the

carouselservice.properties file.

- That the `licensedirectory` property has been set to a valid directory and that the directory contains the file **license.properties**.
- That the correct version of Xalan is being used.
- The installed version of CarouselCRM

If any of the steps fail, the subsequent steps will not be processed until the offending step is fixed as shown in the screenshot below.

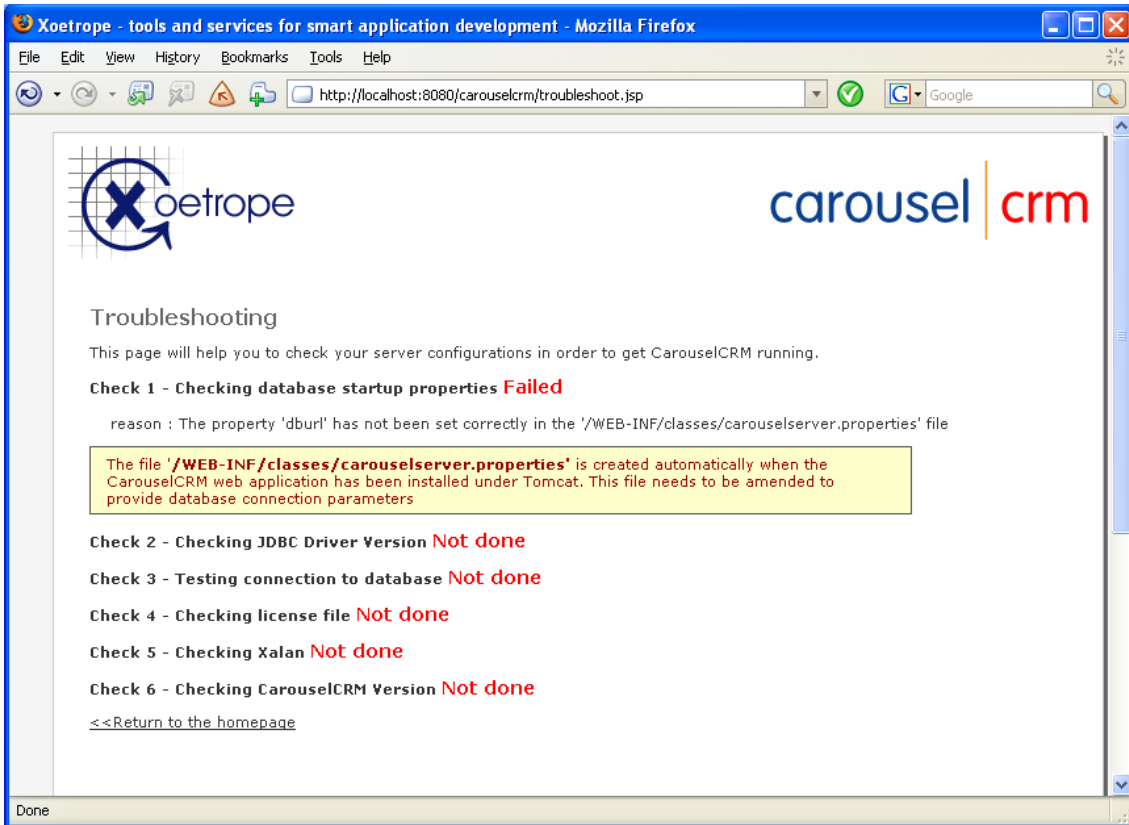


Illustration 3: Automated troubleshooter providing help

When a step fails the reason will be output and a yellow panel will appear giving some hints about what is required to get it working.

Running the CarouselCRM client for the first time

Client requirements

To run the CarouselCRM application a current version of the Java Runtime needs to be installed on the client machine. The installation for this plugin is straightforward and if you navigate to <http://www.java.com> you will be guided through the installation process.

For machines with a Java Runtime already installed, versions 1.4 or 1.5 are sufficient to run the application.

Launching the client and creating an offline icon

Open a browser and navigate to the CarouselCRM application as shown in Illustration 1 above. In order to launch the application click the blue 'Click Here to Webstart Me Now' button. The first time the application starts a number of things will happen as follows...

- You will see a number of jar files being downloaded from the server.
- Once downloaded, the jar files will remain on the client machine and will not need to be downloaded

for subsequent access.

- The application will ask you to allow access to your filesystem as shown in the dialog below. You will need to agree to this dialog in order for the application to run.
- The application will ask you if you wish to create a shortcut on the desktop so that the application can be accessed while offline or directly from the desktop. Click yes and the shortcut icon will appear on your desktop.

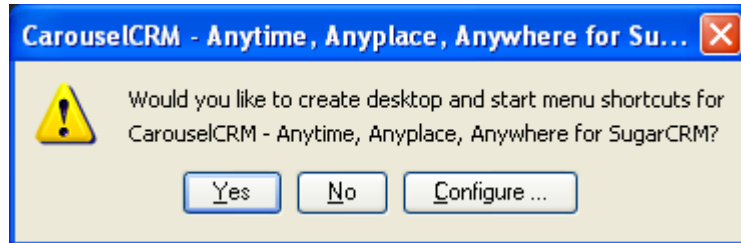


Illustration 4: Creating a desktop icon for offline usage

Removing the client application

You may wish to uninstall the client application from the client machine and this can be done by starting the Java Webstart manager. Run **javaws** in the command line to launch the manager and the screen shown below will appear.

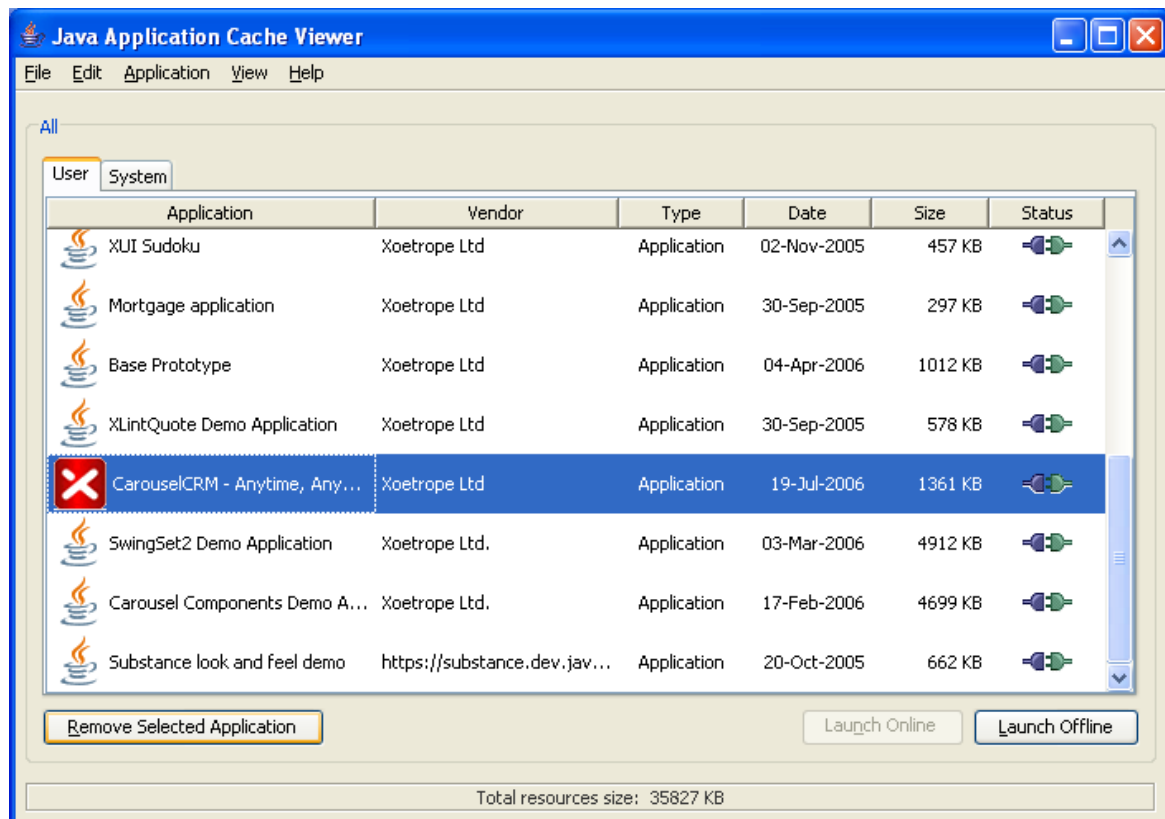


Illustration 5: The Java WebStart manager

Select the CarouselCRM application and click the **Remove Selected Application** button. The application will be removed from the cache.

If you wish to reinstall the application go to the application page in the browser and launch it via Java WebStart once again.

The desktop icons can be reinstalled or removed from here by selecting the application and clicking the **Application | Install Shortcuts** or **Application | Uninstall Shortcuts** menu.

The JNLP file which was used to launch the application can be viewed by clicking **Application | Show JNLP Descriptor**.

Signing in for the first time

When the application appears for the first time you will be asked to enter the name of the directory you wish to use to store your CarouselCRM files. Either create a directory or empty an existing one. Locate the directory using the file locator and sign into the application using your usual SugarCRM user id and password.

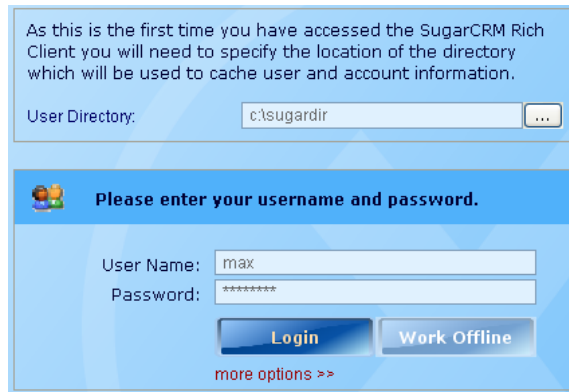


Illustration 6: Logging on for the first time

Once signed in for the first time users can choose to work offline by clicking the 'Work Offline' button. Any attempt to access online functionality will result in the logon dialog to be displayed as shown below.

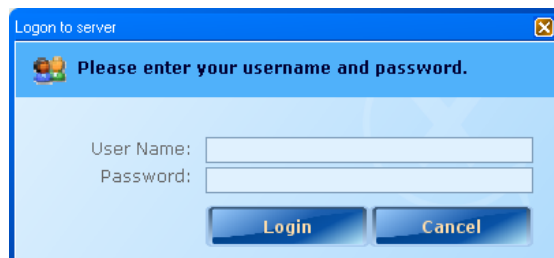


Illustration 7: Prompt to logon when accessing online functionality

Again, enter your user id and password and click the login button. You will now be logged in allowing access to the online capabilities of CarouselCRM.

Resetting the client installation

You may wish to reset the installation of CarouselCRM. In order to do this create a new local directory for CarouselCRM or empty the contents of the existing one.

You will also need to remove the registry setting for the application from **HKEY_CURRENT_USER\Software\JavaSoft\Prefs\com\xoetrope\sugar**

Relaunch the application from the application website as shown in Illustration 1 and once again enter the path to the local directory for CarouselCRM as shown in Illustration 6. You will once again need to login before offline use is allowed.

Alternative ways to run CarouselCRM

JNLP

JNLP files are used to launch Java WebStart applications. When you run the application from the default application site, a JNLP file is being generated which is sent to the client machine. The format of this file is straightforward as shown below.

```
<jnlp spec="1.0+" codebase="http://localhost:8080/carouselcrm/client/">
  <information>
    <title>CarouselCRM - Anytime, Anyplace, Anywhere for SugarCRM</title>
    <vendor>Xoetrope Ltd</vendor>
    <homepage href="http://localhost:8080/carouselcrm/">
    <description>CarouselCRM - Anytime, Anyplace, Anywhere for
SugarCRM</description>
    <description kind="tooltip">CarouselCRM - Anytime, Anyplace, Anywhere for
SugarCRM</description>
    <icon href="http://localhost:8080/carouselcrm/client/xui.gif"
kind="default"/>
    <shortcut online="false">
      <menu submenu="Xoetrope"/>
    </shortcut>
    <offline-allowed/>
  </information>
  <security>
    <all-permissions/>
  </security>
  <resources>
    <j2se version="1.4+"/>
    <jar href="http://localhost:8080/carouselcrm/client/lib/SugarClientS.jar"
download="eager" main="true"/>
    <jar href="http://localhost:8080/carouselcrm/client/lib/XuiCoreSwingS.jar"
download="eager" main="false"/>
    <jar href="http://localhost:8080/carouselcrm/client/lib/XuiOptionalS.jar"
download="eager" main="false"/>
    <jar
href="http://localhost:8080/carouselcrm/client/lib/CarouselRoutesS.jar"
download="eager" main="false"/>
    <jar
href="http://localhost:8080/carouselcrm/client/lib/CarouselSwingComponentsS.jar"
" download="eager" main="false"/>
    <jar
href="http://localhost:8080/carouselcrm/client/lib/xuicustombindingsS.jar"
download="eager" main="false"/>
    <jar href="http://localhost:8080/carouselcrm/client/lib/jacobS.jar"
download="eager" main="false"/>
    <jar href="http://localhost:8080/carouselcrm/client/lib/jacobdllS.jar"
download="eager" main="false"/>
  </resources>
```

```
<application-desc main-class="com.xoetrope.sugar.StartApplet">
  <argument>startup.properties</argument>
  <argument>http://localhost:8080/carouselcrm/xserviceservlet</argument>
</application-desc>
</jnlp>
```

The items shown in **bold red** are generated automatically by the launch.jsp file which can be found in the **carouselcrm\client** directory. It's possible to view the file being generated by your server by launching Java WebStart and opening the JNLP file as shown in Illustration 5 above.

This file can be moved to any type of server and the jar files listed in the **resources** section will need to be copied also. Users can access it as usual from a hyperlink on a webpage.

Command line

It is also possible to start CarouselCRM from the following batch file.

```
java -cp
lib/xuicustombindingsS.jar;lib/carouselRoutesS.jar;lib/CarouselSwingComponentsS
.jar;lib/XuiCoreSwingS.jar;lib/XuiOptionalS.jar;lib/SugarClientS.jar;lib/jacobS
.jar;lib/jacobdllS.jar com.xoetrope.sugar.StartApplet startup.properties
http://localhost:8080/sugarxui/xserviceservlet
```

The text in the batch file should all appear in a single line and the jar files will need to be placed in the **lib** subdirectory. The url shown in **bold red** needs to be updated to point to your CarouselCRM application installation.