

# swDesk

## Online Support System

Customer Relationship Management Software  
Installation Guide

Edition 2.1.2 (English)

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## Introduction

The swDesk Online Support System is an innovative customer relationship management (CRM) software solution designed to help manage customer requests with greater efficiency and accuracy. swDesk is an advanced application with a wide range of features. This manual explains how to install swDesk on your server.

# 1. Software Requirements

Before installing swDesk on your server you must ensure that your server meets the software requirements listed below.

**Operating System:** Linux / FreeBSD / Microsoft Windows®

**Web Server:** Apache version 1.3 (or higher) / IIS

**Script Interpreter:** PHP version 4.3 (or higher)

**DBMS:** MySQL version 4.0 (or higher)

## 2. Installation

This section explains how to install swDesk Online Support System on your server. We recommend that you begin with section “2.1. Pre-installation Preparation”. Then depending on your experience level follow the steps listed in section “2.2. Installation Wizard” or “2.3. Manual Installation”.

## 2.1. Pre-installation Preparation

This section explains the necessary configurations required to install swDesk.

### 2.1.1. Upload swDesk

Uncompress the swDesk distribution file inside your desired directory.

### 2.1.2. Setting Permissions

Setup proper permissions to allow reading and writing for all OS users for the following files and directories<sup>1</sup>:

```
admin/configuration/  
admin/configuration/swdeskconfig.php  
admin/public/files/mail/  
public/files/articles/  
public/files/tickets/
```

---

<sup>1</sup> On Linux or FreeBSD servers, this operation is performed by using the **chmod** command. (Example: `chmod 0777 filename.php` or `chmod 0777 directory_name`).

### 2.1.3. Setup Database

swDesk requires a new or existing<sup>2</sup> database. You will need the database parameters listed below:

- DB name
- DB server host (or IP address) (by default: localhost)
- Port the DB server uses (by default: 3306)
- DB username
- Password

The above DB user must have privileges to perform the following commands:

- SELECT
- INSERT
- DELETE
- UPDATE
- INDEX
- CREATE TABLE
- DROP TABLE
- ALTER TABLE
- CREATE TEMPORARY TABLE
- LOCK TABLES

#### 2.1.3.1. Creating a Database Using your Control Panel

Most hosting companies provide their customers access to a control panel (for example: cPanel, Ensim, Plesk, etc). Such control panels allow you to create a database and a DB user and also to setup database privileges. We recommend that you use the control panel to setup your database if it is available on your server. Or you may request the database information from your hosting provider. If you have SSH access, you may follow instructions in section 2.1.3.2.

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<sup>2</sup> If the existing database contains tables with names which are used by swDesk, they will be dropped.

### 2.1.3.2. Creating a Database (advanced users)

Actions listed in this section must be performed from the command line. This requires a direct access to the server or a privileged remote access using a Telnet or SSH connection. Do not perform these steps unless you are an experienced system administrator. To connect to your MySQL server execute the following command:

```
shell> mysql --user=DB_USER --password=DB_PASSWORD
```

Use 'CREATE DATABASE' SQL command to create a new database.

To create the DB, use SQL command – CREATE DATABASE. (You may use a different database name instead of 'swdesk' for example: support, support\_system, etc).

```
mysql> CREATE DATABASE swdesk;  
Query OK, 1 row affected (0.12 sec)
```

The following SQL command creates a new user 'swdesk\_user' with password 'swdesk\_password' and grant privileges to the database named 'swdesk':

```
mysql> USE swdesk;  
Database changed  
  
mysql> GRANT ALTER,CREATE,CREATE TEMPORARY TABLES,DELETE,DROP,INDEX,  
INSERT,LOCK TABLES,SELECT,UPDATE ON swdesk.* TO swdesk_user@localhost  
IDENTIFIED BY 'swdesk_password' WITH GRANT OPTION;  
  
Query OK, 0 rows affected (0.00 sec)
```

**Note.**

The same command can be used to assign grant privileges to an existing database user.

## 2.2. Installation Wizard

The swDesk Installation Wizard allows you to quickly install swDesk. Prior to running the wizard, be sure that you followed the steps in section 2.1.

To run the installation wizard, open the URL to swDesk in your browser. For example, if your website address is 'www.yourcompany.com', and swDesk is uploaded to the '/support/' directory, you would run the installation wizard by opening the following URL:

- [www.yourcompany.com/support/install/](http://www.yourcompany.com/support/install/)

Then follow the installation instructions provided in the Installation Wizard interface.

**Note.**

If you are unable to run the swDesk installation wizard, add **index.php** after the address. For example: [www.yourcompany.com/support/index.php](http://www.yourcompany.com/support/index.php). If you are still unable to launch the Installation Wizard, proceed to section 2.3 for manual installation.

**Important!**

After the installation is complete, it is strongly recommended to remove the 'install' directory.

## 2.3. Manual Installation (advanced users)

This section explains how to manually install swDesk. Please note that you will need direct access to the server or a privileged connection via Telnet or SSH.

### 2.3.1. Adding DB tables

Before executing SQL commands, ensure that the database and user has been created as explained in section 2.1.3. The swDesk SQL commands can be found in the directory **install/sql/**. (Full path: `install/sql/swdeskdb-mysql.sql`).

You may execute this SQL using 3<sup>rd</sup> party software such as phpMyAdmin<sup>3</sup> or from command line.

Use the following command to execute the SQL from command line:

```
shell> mysql --user=DB_USERNAME -p --database=DB_NAME < ./swdeskdb-mysql.sql
```

For example:

```
shell> cd /var/www/support/install/sql/  
shell> mysql --user=swdesk_user -p --database=swdesk < ./swdeskdb-mysql.sql  
Enter password: *****
```

---

<sup>3</sup> [www.phpmyadmin.net](http://www.phpmyadmin.net)

### 2.3.2. Setup Configuration Files

You must create the configuration files. Configuration file templates can be found in the directory **admin/configuration/**:

- configuration.adv-install
- swdeskconfig.adv-install

Change files' extension to '.php':

- configuration.php
- swdeskconfig.php

Next, edit 'configuration.php' and change the following parameters to the proper values:

<EMAIL\_ADDRESS>

<DATABASE\_NAME>

<DATABASE\_USER>

<DATABASE\_PASSWORD>

<DATABASE\_HOST>

Next, edit 'swdeskconfig.php' and change the following parameters to the proper values:

<URL\_TO\_SWDESK>

<COMPANY\_NAME>

<COMPANY\_URL>

*swDesk installation is now complete.*