2.0 - ProcessMaker Generic Installation

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Follow these generic instructions to install ProcessMaker 2.0 on a server running Linux or UNIX or Windows (XP, Server 2003, Vista, 7, 8 or Server 2008). Before installing ProcessMaker, check its Installation Requirements. After installation, see Additional Server Configuration.

Installing ProcessMaker

1. Go to http://sourceforge.net/projects/processmaker/files and download a recent tarball of ProcessMaker, which should be named processmaker-2.X.X.tar.gz The versions are numbered according to the pattern MAJOR.MINOR.REVISION, such as “2.0.36”. 2. Move the processmaker-2.X.X.tar.gz file which was downloaded to the directory in your server where the ProcessMaker application will be stored. ProcessMaker can be installed in any directory which is not publicly accessible to the internet (so do NOT install it in /var/www in Linux/UNIX).

In Linux/UNIX, it is generally installed in the /opt directory, since it is an optional program which doesn't come from the standard repositories. In Windows XP and Server 2003, it is generally installed in the C:\Program Files directory.

The code files are in tar.gz format and can be extracted using most compression tools, like the tar command in Linux/UNIX or WinRAR or 7-Zip in Windows. Linux/UNIX: tar -C /opt -xzvf processmaker-2.X.X.tar.gz MS

Linux/UNIX:

```
cd <INSTALL-DIRECTORY>/processmaker
chmod -R 770 shared
cd <INSTALL-DIRECTORY>/processmaker/workflow/engine/
chmod -R 770 config content/languages plugins xmlform js/labels
```

From version 2.0.40 give write permissions to:

```
chmod -R 770 <INSTALL-DIRECTORY>/processmaker/workflow/public_html
```

From version 2.5.0 give write permissions to:

```
chmod -R 770 <INSTALL-DIRECTORY>/processmaker/gulliver/js
chmod -R 770 <INSTALL-
DIRECTORY>/processmaker/gulliver/thirdparty/html2ps_pdf/cache
```

Then, change the owner of the ProcessMaker files to the user who runs Apache. The name of this user varies from distribution to distribution:

Red Hat/CentOS/Fedora:

```
chown -R apache:apache <INSTALL-DIRECTORY>/processmaker
```

Debian/Ubuntu:

```
chown -R www-data:www-data <INSTALL-DIRECTORY>/processmaker SUSE/OpenSUSE:
chown -R wwwrun:www <INSTALL-DIRECTORY>/processmaker
```

Apache Configuration

Edit the file <INSTALL-DIRECTORY>/processmaker/etc/pmos.conf with a plain text editor (such as Notepad or Notepad++ in Windows or vim, nano or gedit in Linux/UNIX).

Modify the following virtual host definition to match your environment:

Please change the IP address with your server's IP address and

```
# the ServerName with you own subdomain for ProcessMaker.
NameVirtualHost your_ip_address
#processmaker virtual host
<VirtualHost your_ip_address >
  ServerName "your_processmaker_domain"
  DocumentRoot /opt/processmaker/workflow/public_html
  DirectoryIndex index.html index.php
  <Directory  "/opt/processmaker/workflow/public_html">
     AddDefaultCharset UTF-8
     AllowOverRide none
     Options FollowSymlinks
     Order allow,deny
     Allow from all
     RewriteEngine on
     RewriteRule ^.*/(.*)$ sysGeneric.php [NC,L]
     ExpiresActive On
     ExpiresDefault "access plus 1 day"
     ExpiresByType image/gif "access plus 1 day"
     ExpiresByType image/png "access plus 1 day"
     ExpiresByType image/jpg "access plus 1 day"
     ExpiresByType text/css "access plus 1 day"
     ExpiresByType text/javascript "access plus 1 day"
     AddOutputFilterByType DEFLATE text/html
  </Directory>
</VirtualHost>
```

Note: If using Apache 2.4, then change the following line from:

Allow from all To:

Require all granted Replace your_ip_address with the IP number or domain name of the server running ProcessMaker. If only planning on running and accessing ProcessMaker on your local machine, then use the IP address “127.0.0.1”. If using ProcessMaker on a machine whose IP address

might change (such as a machine whose IP address is assigned with DHCP), then use “*”, which represents any IP address. If not using the standard port 80, then it is necessary to also specify the port number.

If your DNS or /etc/hosts has a defined domain for ProcessMaker, then use that domain for your_processmaker_domain. Otherwise, use the same IP address for your_processmaker_domain as was used for your_ip_address. If ProcessMaker is installed in a location other than /opt/processmaker/ , then edit the paths to match where Processmaker is installed on your system.

For example, if running ProcessMaker on a Windows XP server at address 192.168.1.100 on port 8080 with a domain at processmaker.mycompany.com: NameVirtualHost 192.168.1.100:8080 #processmaker virtual host <VirtualHost 192.168.1.100:8080 >

```
ServerName "processmaker.mycompany.com"
DocumentRoot C:\Program Files\processmaker\workflow\public_html
DirectoryIndex index.html index.php
<Directory  "C:\Program Files\processmaker\workflow\public_html">
...
```

For example, if running ProcessMaker on a Linux server at address server1.example.com with a domain at pm.example.com:

NameVirtualHost server1.example.com #processmaker virtual host <VirtualHost server1.example.com >

```
ServerName "pm.example.com"
DocumentRoot /opt/processmaker/workflow/public_html
DirectoryIndex index.html index.php
<Directory  "/opt/processmaker/workflow/public_html">
...
```

For example, if ProcessMaker is installed in the “/home/fred” directory on your local machine at port 8080 with an dynamic IP assigned by DHCP:

NameVirtualHost *:8080 #processmaker virtual host <VirtualHost *:8080 >

```
ServerName "*"
DocumentRoot /home/fred/processmaker/workflow/public_html
DirectoryIndex index.html index.php
<Directory  "/home/fred/processmaker/workflow/public_html">
...
```

Note: It is also possible to define the virtual host for ProcessMaker directly in the Apache configuration by inserting the above VirtualHost definition in the Apache configuration file, which is generally named httpd.conf.

Then, copy the pmos.conf file to the following directory, where it will automatically be loaded by the Apache web server:

Generic Linux/UNIX:

/etc/httpd/conf.d/pmos.conf Debian/Ubuntu:

/etc/apache2/sites-available/pmos.conf Then issue the command:

a2ensite pmos.conf Windows:

C:\wamp\bin\apache\apache2.2.8\conf\extra\pmos.conf If using Windows, add the following line to the httpd.conf file, so that the ProcessMaker virtual configuration can proceed:

Include “C:\wamp\bin\apache\apache2.2.8\conf\extra\pmos.conf” Note: If Apache is using the default port 80, then configure Skype and other programs to not use port 80. You can check whether a program is currently listening on port 80 with netstat -anb in Windows or netstat -tanp in Linux/UNIX.

To configure Skype to stop listening on port 80, go to Tools > Options. Under the Advanced section of the “Options” dialog box, select the Connection tab. Deselect the option Use port 80 and 443 as alternatives for incoming connections.

ProcessMaker Configuration

Open a web browser and enter the IP address (and port number if not using the default port 80) where ProcessMaker is installed. For instance, if ProcessMaker is installed at the address 192.168.10.100 with port 8080, then go to: http://192.168.10.100:8080

If using ProcessMaker on the local machine, then go to: http://127.0.0.1

The installation configuration page should appear to setup ProcessMaker. If the default Apache page appears, then first disable it and try again.

In the configuration page, enter in the username and password to access MySQL. This should be a user such as “root” who has privileges to create new MySQL databases. Click on the Test button to verify that ProcessMaker is configured properly. Green checkmarks will indicate that the settings work correctly:

\ To change a setting after clicking Test, click on Reset. To change the default administrator username and password, select the option in the ProcessMaker Configuration section. Once all the settings are properly configured click on Install to install processmaker. The installation screen should indicate SUCCESS. If errors arise, please check the file <INSTALL-DIRECTORY>/shared/log/install.log and visit the Processmaker forum to get support.

At the login screen, enter the Username of “admin” and the Password of “admin” and the Workspace name, which by default is “workflow”. Once logged in as the administrator, new users and processes can be created inside ProcessMaker. To login with a different workspace, language or skin, see the Login section.

If the ProcessMaker configuration screen appears the next time you try to login, press CTRL+SHIFT+r or CTRL+F5 to clear the web browser's cache.

Note: It is a good idea to reset the administrator's password to something more secure in the future before using ProcessMaker in production.

Additional Configuration

Additional aspects of ProcessMaker may need to be configured. See Additional Server Configuration and the Configuration section of the wiki. Most installations of ProcessMaker need to configure the following:

Setting the Time Zone

In ProcessMaker version 2.0.29 and later, the default time zone for the ProcessMaker server is set in the env.ini configuration file. If using a previous version of ProcessMaker, see Default Time Zone.

Configuring Email

If planning on sending out email notifications or enabling users to recover forgotten passwords, then see Email - Settings to configure ProcessMaker to use an email server.

Execution of cron.php

If planning on using email notifications, events or the case scheduler, then the server running ProcessMaker has to be configured to periodically execute the cron.php file. See Executing cron.php.

Errors during Installation

If an error occurs during the installation, check the installation log file:

<PROCESSMAKER-INSTALL-DIRECTORY>/shared/log/install_log.log Depending on the errors found in the installation log file, check the following files:

The Apache configuration file:

<APACHE-INSTALL-DIRECTORY>/httpd.conf The ProcessMaker web site configuration file for Apache:

<APACHE-INSTALL-DIRECTORY>/conf.d/pmos.conf The PHP configuration file:

<PHP-INSTALL-DIRECTORY>/php.ini The MySQL configuration file:

<MYSQL-INSTALL-DIRECTORY>/my.ini The ProcessMaker configuration file where components are installed:

<PROCESSMAKER-INSTALL-DIRECTORY>/workflow/engine/config/paths_installed.php The ProcessMaker configuration file for database connections:

<PROCESSMAKER-INSTALL-DIRECTORY>/shared/sites/workflow/db.php The ProcessMaker redirection to login screen:

<PROCESSMAKER-INSTALL-DIRECTORY>/processmaker/workflow/public_html/index.html If the following error appears at the login screen:

This error indicates that the installer was unable to access the MySQL databases to install the translations. Make sure that the MySQL port (which is 3306 by default) isn't blocked by a firewall and MySQL is configured to accept connections from the server running Processmaker.

If the following error occurs during the “finalizing” stage on the wizard:

Could not execute query [Native Error: You do not have the SUPER privilege and binary logging is enabled (you *might* want to use the less safe log_bin_trust_function_creators variable)] [User Info: DROP TRIGGER IF EXISTS APP_DELEGATION_INSERT]. Add the following line inside the my.cnf file:

log-bin-trust-function-creators = 1

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