

Daylite Server Admin Guide

(Dec 09, 2011)

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Objective

The purpose of this document is to help you with getting started and using Daylite Server Admin.

Audience

This document is aimed at individuals (or administrators) who are responsible for setting up and managing Daylite's shared environment.

Overview

Daylite Server Admin is a **free** tool that enables you to set up and share Daylite databases in a multi-user environment. Daylite Server Admin hosts your Daylite databases and Touch Server. Touch Server is an essential component to use Daylite Touch; it is the conduit by which data is exchanged and synchronized between Daylite and Daylite Touch.

System requirements

- Mac OS X Leopard/Snow Leopard/Lion is recommended as the server. The minimum supported version is Mac OS X 10.5.6. **Note:** Laptops are not recommended due to changing networks. For more information, [click here](#).
- 1 GHz G4 or higher Universal Binary supported. (Server may require a faster machine.)
- 1 GB RAM and 200 MB hard-disk space. Hard-disk space requirements may vary depending on the size of your database.
- 1024 x 768 or higher screen resolution.

For Mac OS X Tiger users only: As of Daylite 3.15, support for Mac OS X Tiger has ceased. However, Daylite 3.15 can interoperate with Daylite & Daylite Server 3.14. For more information about this, [click here](#).

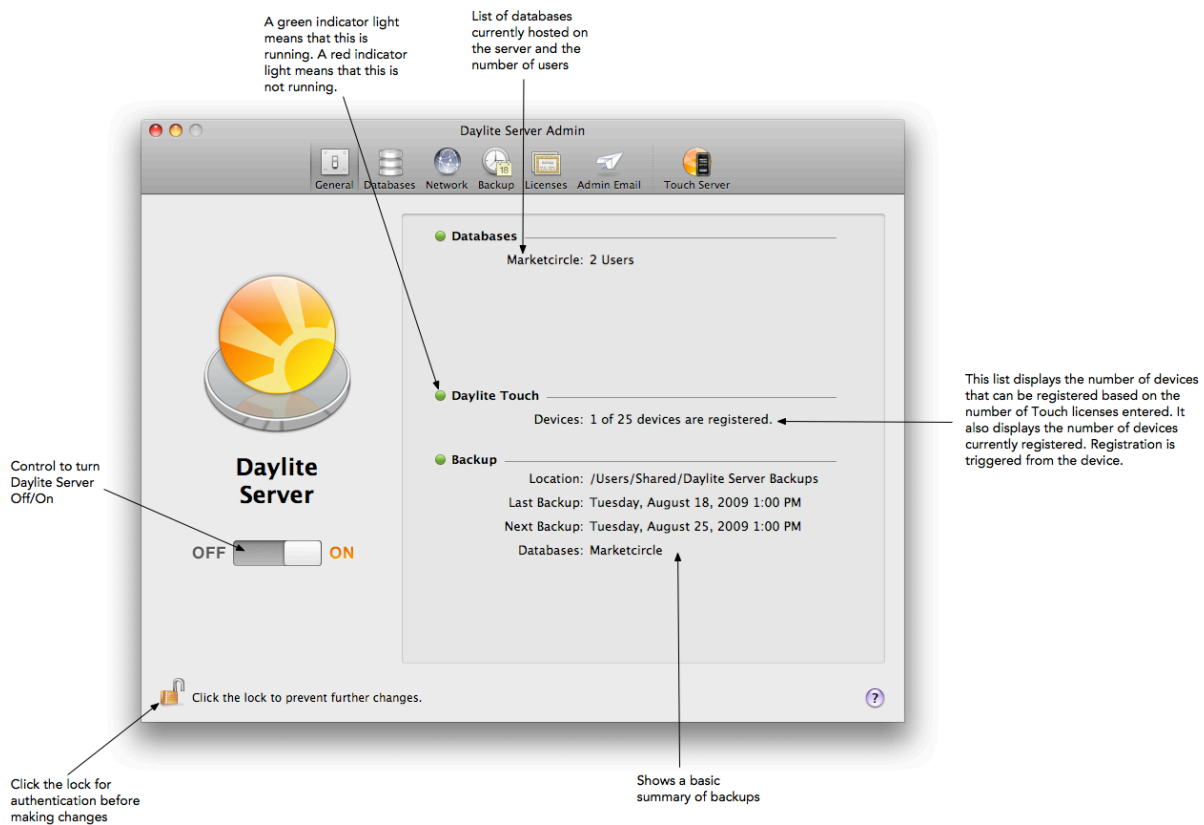
Note: To be able to install and use Daylite Server Admin application, you should be logged in as an administrator of your computer. You'll be required to authenticate before installing and making any changes on Daylite Server Admin.

Setting up the Daylite Server Admin

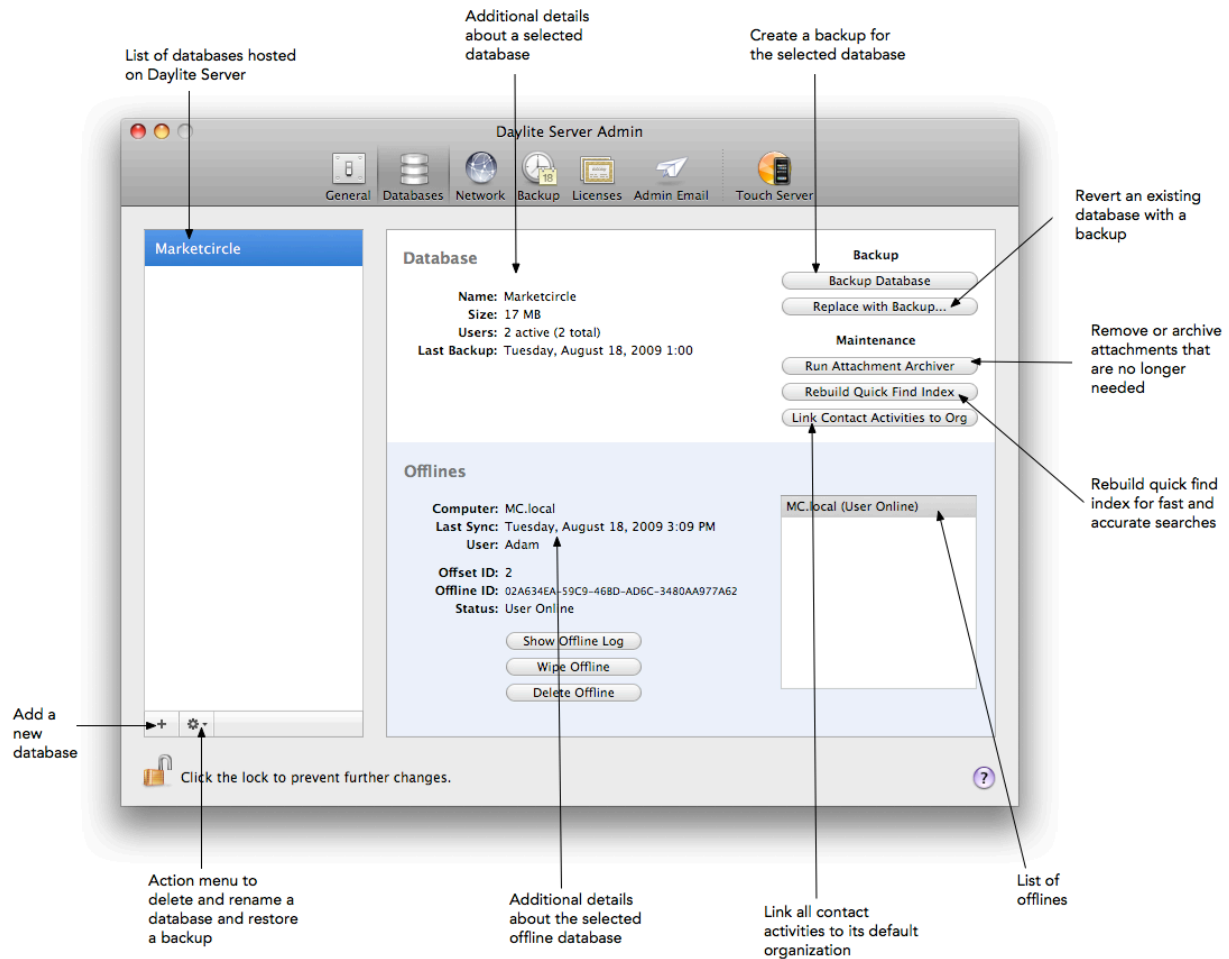
Step 1: Turning Daylite Server "On"

Daylite Server should be turned "On" for databases to be available for users to connect. There is no need to keep the application open and running.

Sometimes, you might want to turn Daylite Server "Off." For example, if you want to upgrade your database or have a new version that has schema updates, then you could turn Daylite Server "Off" and apply the updates. During this time, the databases will not be available for users to connect. Once you are done, you can turn Daylite Server "On."



Step 2: Adding databases for hosting on the server



Working from the Databases pane of Daylite Server Admin, you can add new databases for hosting on the server.

To add databases on Daylite Server

1. Working from Daylite Server Admin, click **Databases**.
2. Click the "+" button at the bottom-left corner of the application.
3. Enter the details for setting up a new database.
4. Click **Finish**.

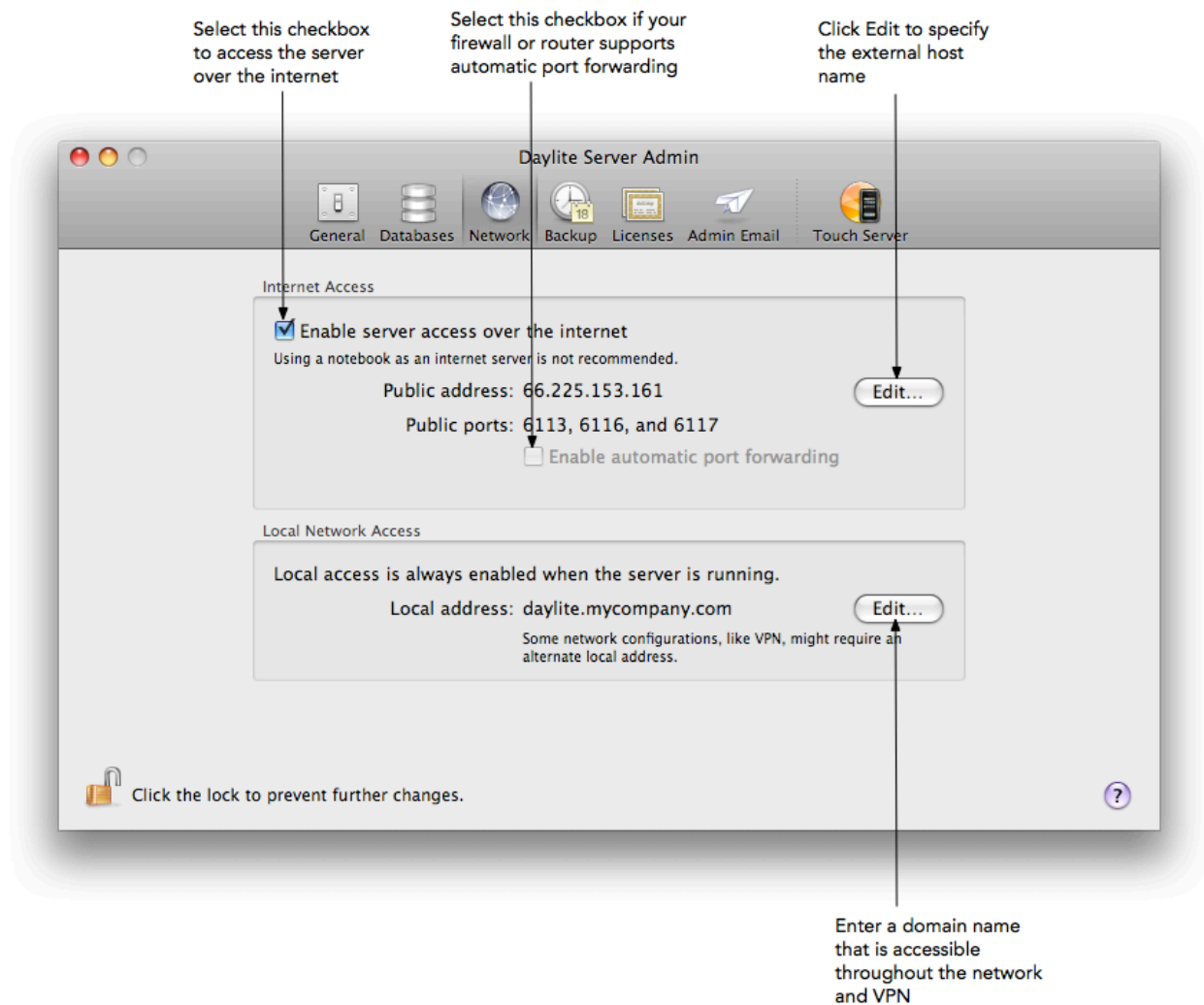
Databases can also be restored from their backups and made available for users to connect. For example, if you notice that a database is corrupted, then you can delete the database and restore a backup. Hence, it's very important that you create database backups frequently (or schedule automatic backups), so you can restore a backup in unforeseen situations.

To restore a database backup

1. Launch Daylite Server Admin.
2. Click **Databases**.
3. Click the Action pop-up menu and select **Restore a Database Backup**.
4. In the sheet that opens, select the backup you want to restore. **Note:** Only Daylite 3.9 and higher databases can be restored using Daylite Server Admin. If you have a 3.8 or earlier backup, you'll need to restore it in that version and then migrate to the latest version of 3.9.x. For more information about migration, [click here](#).
5. Click **Select**.
Daylite Server Admin restores the database backup.

See **Help > Daylite Server Admin Help** for more information.

Step 3: Specifying network settings



Daylite can connect to any database that resides on the server either locally or remotely. Users who wish to configure access to server over the internet or VPN should specify certain settings. For example, consider you are working from home or on the road and want remote access to Daylite Server/Touch Server. If you've configured the network settings, then Daylite can connect to Daylite Server and your device can connect to the Touch Server automatically.

Note: Daylite Server encrypts all network traffic with industry-standard SSL technology. If you have questions about this, please contact us at info@marketcircle.com and we'll be glad to assist you.

Keep in mind that local access is always enabled when the server is running.

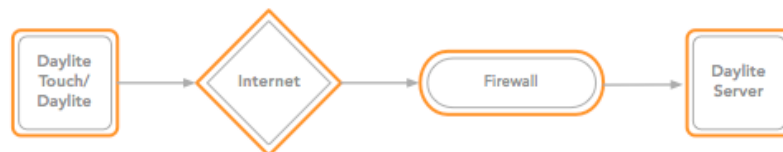
If you wish to connect remotely, you should specify the external host name and enable automatic port forwarding.

Note: Remote access is not recommended for single users. Single users should sync over the Wi-Fi network to avoid unnecessarily complex setup.

- The external host name should be a static IP (Public) address. Otherwise, if you have a domain name set up, you can enter it here. The external host name you specify here is commonly used by both Daylite and Daylite Touch for connecting remotely. For more information about static IP's, [click here](#).
- The Network pane displays the ports that are used by Daylite Server and Touch Server. You can turn "On" automatic port forwarding if your firewall or router supports it. This tells the router how to pass a connection to the server machine automatically when you are trying to connect externally. If your firewall or router does not allow for automatic port forwarding, then you'll have to manually go into your firewall or router and open these ports. For more information about router support and port forwarding, [click here](#). You can also refer to your router's manual for further details.
- **Local network access:** You can enter a domain name that is accessible throughout the network and also VPN, if applicable. The internal host name you specify here is commonly used by both Daylite and Daylite Touch for connecting remotely through VPN.

To specify network settings

1. Launch Daylite Server Admin.
2. Click Network.
3. Select the Enable server access over the internet checkbox.
4. Click Edit to specify a static IP address or a domain name to point to the IP address of the server.
5. Select the Enable Automatic Port Forwarding checkbox. **Note:** This option is available only if your firewall or router supports automatic port forwarding. If you use automatic port forwarding, the Daylite Server Admin should be kept running. If you don't want to keep Daylite Server Admin running, then you'll have to manually set up the ports in your router.



You should open the ports and forward to the appropriate computer to be able to connect remotely. Go to Daylite Server Admin and select the network settings. If you have UPnP enabled, then Daylite Server Admin may be able to configure the router to open the ports; otherwise, you'll have to open the ports manually. This does not involve Daylite and should be performed by the user with help from either Apple or a third party technician. If you wish to know how to set up Daylite for internet access, [click here](#).

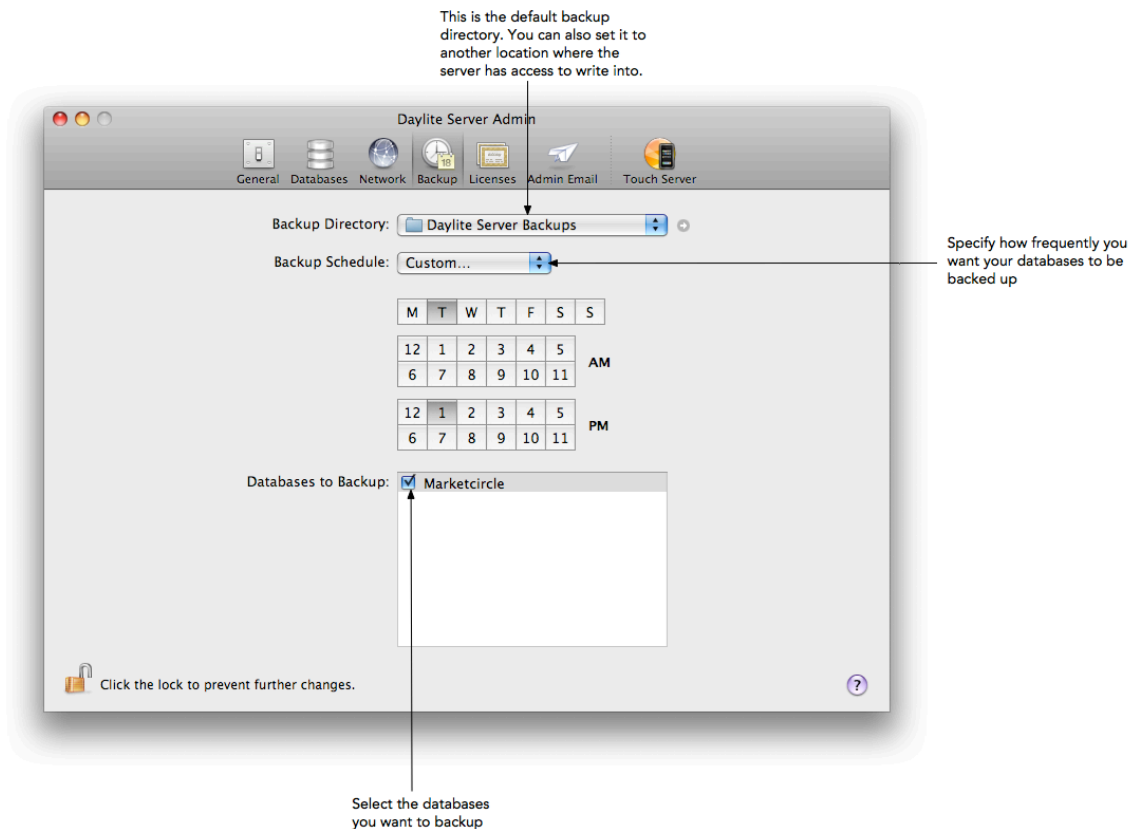
6. If Daylite should connect to the server over a VPN, you should specify the local domain name of the server machine. In the "Local Access Network" section, click "Edit" to enter the desired host name. Doing this will point the host name to Daylite Server when connecting internally or through a VPN.

Remote access

If you're connecting to Daylite for the first time over a LAN, then as long as you have enabled internet access and entered a static IP or DynDNS name into Daylite Server, Daylite should automatically log and remember the internet access details. When you log into Daylite remotely, there should be no need to change the connection details.

In cases where the user is permanently remote or working remotely for the first log in, the user would need to enter the static IP or DynDNS name into Daylite in order to access the server. If the user returns from the remote location to find themselves on the same LAN as the server, they may be required to enter the LAN connection details into Daylite, except in cases where there is an internal DNS which resolves internet domain names to internal computers.

Step 4: Scheduling automatic database backups



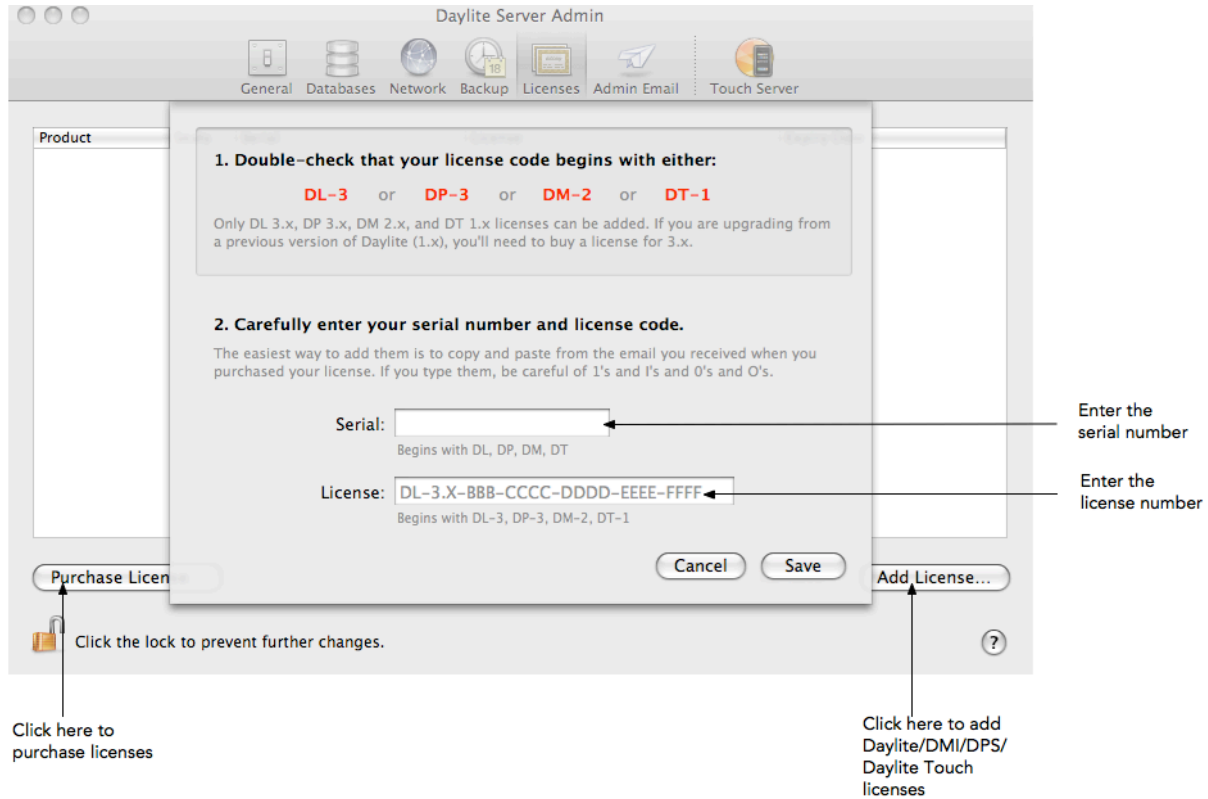
It is recommended that you always maintain a regular backup of your Daylite databases. Anyone who is familiar with computers has suffered at least once from forgetting to backup a document or an email and knows how important this is. Freezes, power outages, and other random occurrences can wipe out the data you were working with, but if you're backing up regularly, you can protect yourself from this. We provide an easy and quick backup procedure that enables you to schedule automatic backups for your databases.

To schedule automatic backups for your databases

1. Working from Daylite Server Admin, click **Backup**.
2. Specify a backup directory.
Note: The default backup directory is "Daylite Server Admin Backups." However, you can also set the backup directory to any other location where the server has access to write into. All backups must be saved on the local drive. External drives or shared drives are not supported for saving backups. If you wish, you may save your backups locally and move them to an external drive manually on a regular basis.
3. Select a backup schedule to specify how frequently you want your databases to be backed up.
4. Select the databases you want to backup.

Daylite Server Admin creates backups for the selected databases in the backup directory according to the schedule you've set up.

Step 5: Adding licenses on Daylite Server Admin



The Licenses pane of Daylite Server Admin is a common place to add your Daylite, Daylite Mail Integration (DMI), Daylite Productivity Suite (DPS), and Daylite Touch licenses.

In a multi-user environment, all Daylite licenses must be added in Daylite Server Admin. Once you do this, Daylite on your client machines can automatically connect to the database on the server. This is called centralized licensing. There is no need to add licenses on each and every computer that wants to establish a connection with the server. However, in a single-user environment, you would have to enter your license in Daylite only.

Consider, for example, you install 5 licenses on the server for the product Daylite. This means only 5 users can be concurrently connected to the database on the server. Daylite works on a concurrent use model. You only need licenses for the number of people that will use Daylite at the same time on the same or different databases.

The licensing model for Daylite Touch is slightly different. You will only need 1 Daylite Touch license to support all your devices. For example, a Daylite Touch license

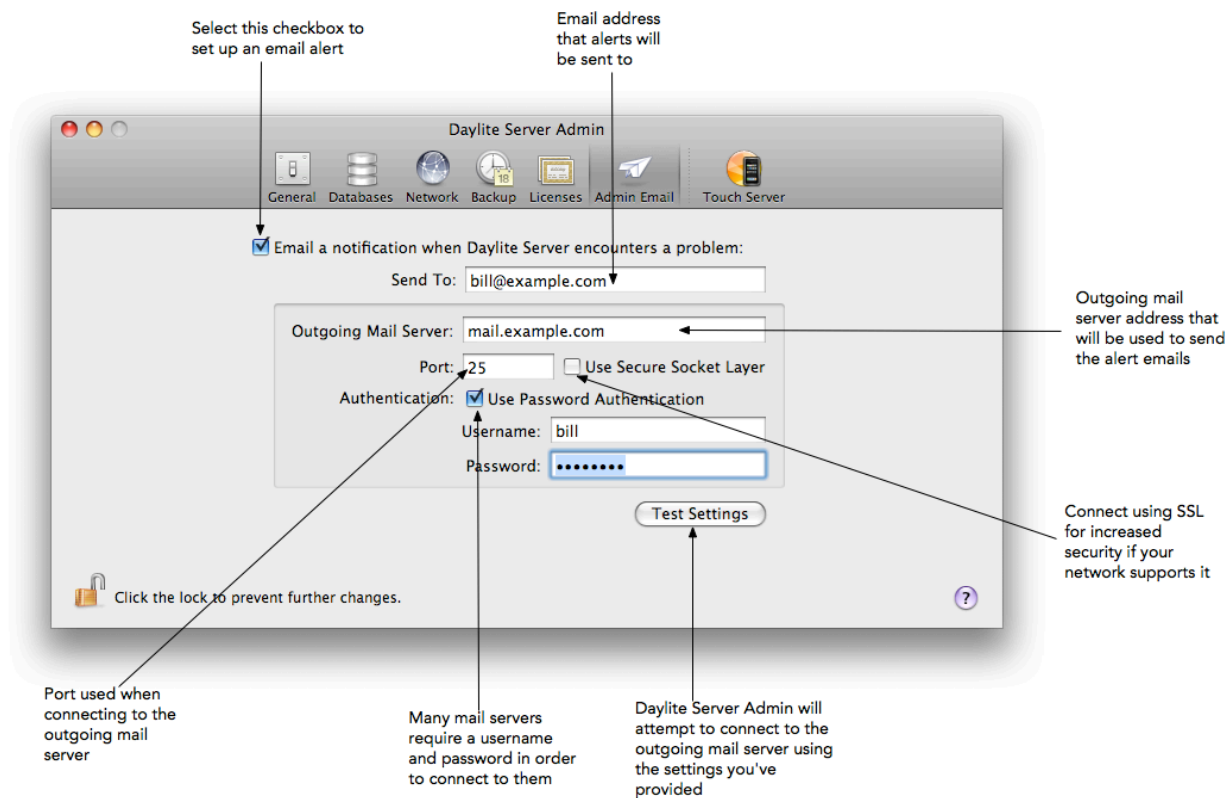
supports any number of iPhones, iPods, and iPads for a single Daylite user. With one license, you will be able to connect to your database on multiple devices and synchronize with the Touch server concurrently.

Note: A user in offline mode consumes a license on the server until that user goes online. Other users connected to the server each take up a license.

To add a license on Daylite Server Admin

1. Working from Daylite Server Admin, click **Licenses**.
2. Click **Add License**.
3. Enter the serial number and license code.
4. Click **Save**.

Step 6: Setting up email alerts

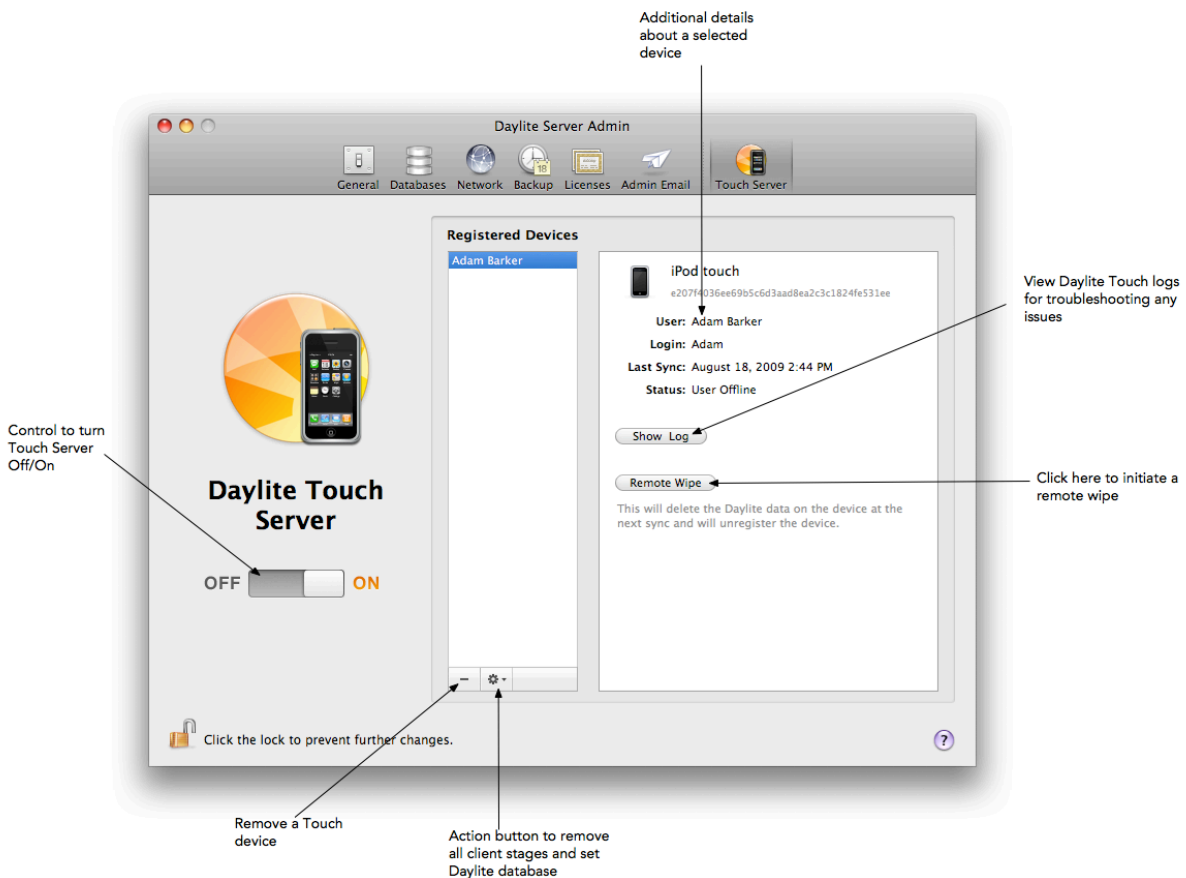


You can set up an email alert to notify the admin when Daylite Server encounters a problem. Working from the Admin Email pane of Daylite Server Admin, you can enter the appropriate settings required to send an email.

To set up email alerts

1. Working from Daylite Server Admin, click Admin Email.
2. Keep in mind the following:
 - Select the "Email a notification when Daylite Server encounters a problem" checkbox.
 - Enter the appropriate settings. Pointing your mouse pointer on each text field displays tooltips explaining what information should be entered in that field.
 - Once you've entered all the connection details, click Test Settings. This will send out a test message to the address you've entered in the "Send To" field. If the server is successful in sending a test message, you'll see a green status indicator saying "Test email sent."

Step 7: Configuring Daylite Touch Server



To be able to use Daylite Touch with your device, you should configure the settings for Touch Server. Ensure that you turn Daylite Server "On" before turning the Touch Server "On."

To configure Daylite Touch Server

1. Working from Daylite Server Admin, click **Touch Server**.
2. Turn Daylite Touch Server "On."
3. In the sheet that opens, select the Daylite database for use with Touch. Click **OK**.
Note: You can only select one Daylite database for use with Daylite Touch.
4. Ensure that you have enough licenses for working with Daylite Touch.
5. Download Daylite Touch from the app store onto your device and connect to the Daylite database on your device. For more information about Daylite Touch Server setup, [click here](#). For more information about using Touch, please see [Daylite Touch User Guide](#).

Once you've set up the Touch Server, you'll be able view all the devices registered for using Daylite Touch and additional information for each device.

Database Security

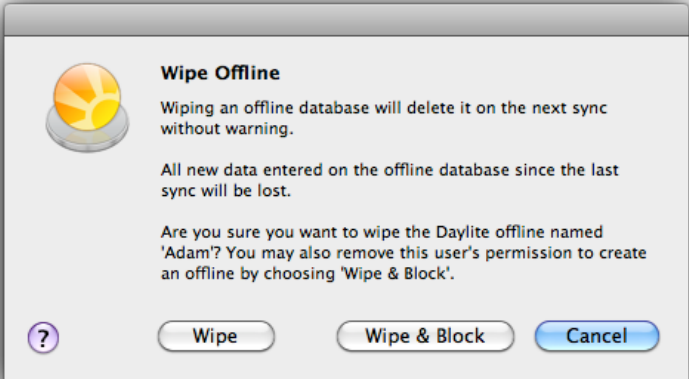
For security reasons, you may sometimes want to erase the Daylite database on a device or restrict a user from accessing their database. Wiping an offline database sends a message to delete it the next time you sync. There are 2 ways of using the wipe functionality.

- * **Wipe:** If a user lost their laptop and want to ensure that someone who finds it can't get to the live data by syncing the offline, then the administrator can **wipe** the offline database using Daylite Server. This is useful, for example, when the user still exists in your company and you don't want to block that user from accessing their database.
- * **Wipe & Block:** If you want to ensure that the user no longer has the offline database on their computer and stop an offline user from accessing the database, then you can **wipe and block** the offline database. For example, if someone leaves your company without returning their laptop having Daylite data, then the administrator can not only erase the database, but also block the user from connecting back to the server.

1. Wiping offline databases

- a. Working from Daylite Server Admin, click **Databases**.
- b. Select a database.
- c. Select the offline database.
- d. Click **Wipe Offline**.

Daylite Server Admin opens an alert window.



- e. Select the appropriate option either Wipe or Wipe & Block. The option to block will only be available if the selected offline is the user's only offline listed on the system.

The next time the user synchronizes the offline, they will get an alert saying "Offline Database Removed" that confirms that the offline has been wiped.

Note: If you are wiping a database for security reasons, you should also change the password for the user of the offline being wiped. Any other offlines the user has created will need to be taken online or deleted prior to be able to change the user's password.

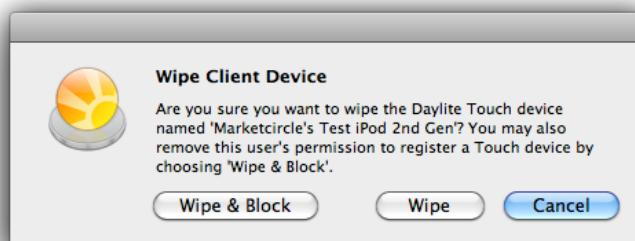
2. Initiating a remote wipe from Touch Server

Working from the Touch Server, you can initiate a remote wipe to delete the Daylite data on a device at the next sync and unregister the device.

To initiate a remote wipe from Touch Server

- a. Working from Daylite Server Admin, click Touch Server.
- b. Select a device.
- c. Click **Remote Wipe**.

Touch Server opens an alert window.



- d. Select the appropriate option either **Wipe** or **Wipe & Block**.

The device is scheduled to be wiped. The next time the user opens Daylite Touch and syncs, they will notice that their Daylite database has been erased by the server. If you've selected "Wipe & Block" then the database will be erased and the user will not have permission to use Daylite Touch.

3. Reinstating a user after a wipe and block

If you've wiped a Daylite database and blocked a user from accessing it, then the administrator can reinstate the user. By doing so, the user can regain the ability to work offline and/or synchronize data with Daylite Touch.

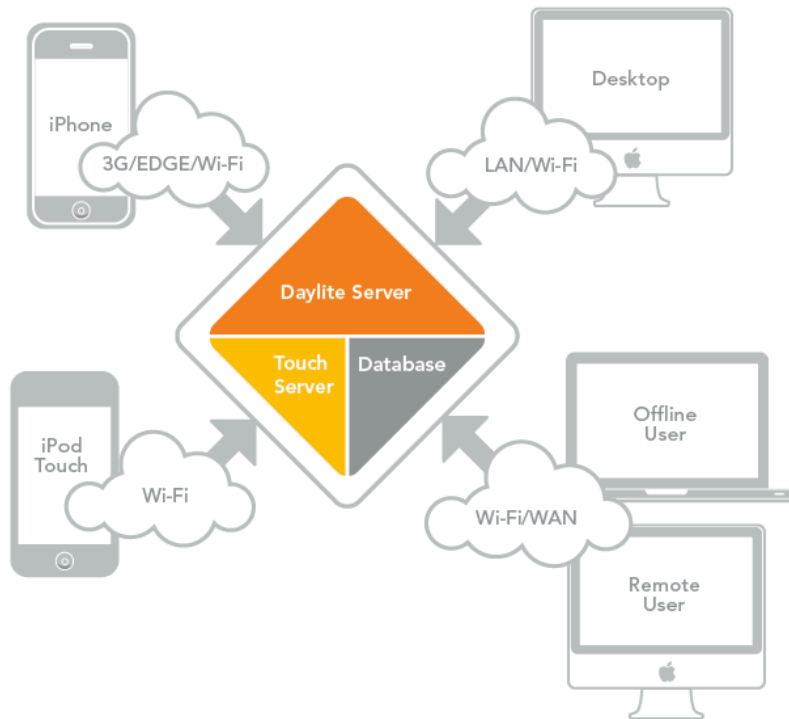
To reinstate a user after a wipe and block

- a. Login to the database as an administrator.
- b. Choose **Daylite > Preferences**.
- c. Click **Users & Teams**.
- d. Select a user.
- e. Click the **Permissions** tab.
- f. Do the following:
 - To allow the user to go offline, select the "Work Offline" checkbox.
 - To allow the user to access and use the Daylite database on their device, select "Synchronize data with Daylite Touch."

Further reading

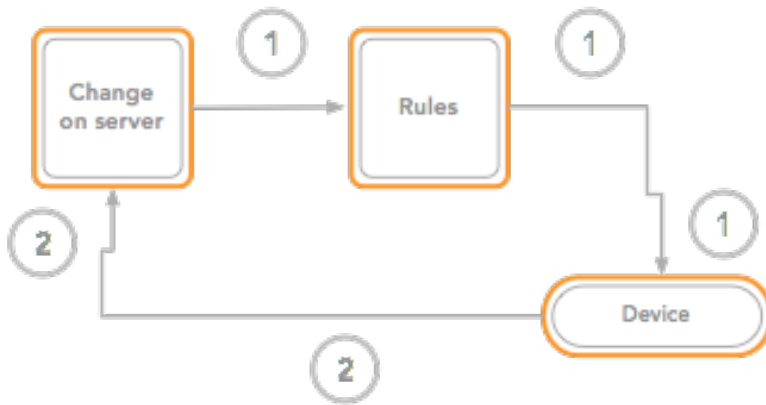
Understanding Daylite Touch environment

At the core of the Daylite Touch environment is the Daylite Server Admin that is hosted on a computer running Mac OS X or Mac OS X Server. Daylite Server Admin has your database and the Touch Server.



If you are using an iPhone, you can connect to Daylite Server Admin via 3G/EDGE/Wi-Fi. If you are using an iPod Touch, you can connect to Daylite Server Admin via Wi-Fi only. **Note:** Syncing Daylite Touch with Daylite Server Admin using a cable is not supported.

When a change happens on the server, there is a 5-10 minutes delay before it's available to the device provided the device is connected to the internet or on the local network. During this time, the change is validated against the rules, and some items may not appear on your device if they don't conform to the rules system. When your device synchronizes with Daylite Server, the changes go through automatically without any delay.



A change on your server goes through the rules engine. If it conforms to the rules, then the change is synchronized with your device. This phase is represented as ①.

On the other hand, all changes on your device are updated on the server. This phase is represented by ②. More information about rules for syncing is available in the [Daylite Touch User Guide](#).

Help and other resources

There are a number of resources available to help you to learn more about Daylite Server Admin and provide answers when you have technical questions.

- We have certified partners who can provide product training and other specialized services. For more information, [click here](#).
- Apple Help offers step-by-step instructions and tips for making the most out of Daylite Server Admin. While using Daylite Server Admin, choose **Help > Daylite Server Admin Help**.
- The support website and knowledge base has up-to-date articles and movies that can help you solve technical difficulties. Visit <http://www.marketcircle.com/help/index.html>.
- Visit <http://forums.marketcircle.com> to share ideas, tips, and questions with other users. Marketcircle engineers, designers, and support staff also share their knowledge on the forums.

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