

Daylite 3.9 Migration Guide

(For Daylite 3.9 or later versions only)

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Objective

The purpose of this document is to help you with migrating databases prior to 3.9 to work with Daylite 3.9.

Audience

This document is useful for users and/or administrators who are responsible for migrating pre-Daylite 3.9 databases to work with Daylite 3.9.

System requirements

- Tiger users should use Mac OS X 10.4.11 at minimum. Leopard users should use Mac OS X 10.5.6 or higher versions.
- 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.

If you are using an old version of Daylite and have not updated, keep in mind there have been significant changes with each new release. See the [release history](#) in our knowledge base for more information.

Note: For existing users, we recommend that you allocate some time for the migration process. Or, you could do it when you have some down time.

Overview

Starting from v 3.9, Daylite and Daylite Server Admin exist as 2 different components. In a multi-user environment, you would need both Daylite and Daylite Server Admin; however, single-users don't need Daylite Server Admin. Daylite Server Admin is the central control for the new offline system and the Daylite Touch infrastructure. A part of this infrastructure is a new, more powerful, more scalable, more future friendly database engine that replaces OpenBase (the old database system). The new database system is powered by Postgres, a proven, popular SQL database engine.

Daylite Server Admin

We now have a dedicated Daylite Server Admin application. This new server component is required when sharing databases, synchronizing with offline databases or with Daylite Touch. Daylite Server Admin is only required on the "server" machine. It is not required on all computers. Client computers that run Daylite have their own environment created by the application. Daylite Server Admin also offers centralized licensing for Daylite and DMI.

Note: For more information about Daylite Server Admin, [click here](#).



Networking and port forwarding

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. Keep in mind that local access is always enabled when the server is running. **Note:** Remote access is not recommended for single users. Single users should sync over the Wi-Fi network to avoid unnecessarily complex setup.

You should specify the external host name and enable automatic port forwarding to be able to connect remotely.

- 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](#) or refer to your router's manual.
- **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 is commonly used by both Daylite and Daylite Touch for connecting remotely through VPN.

Using Dynamic DNS services

If you don't have a static IP or domain name, you can use services such as www.no-ip.com and/or www.dyndns.com for remote access.

Changes to licensing

In a multi-user environment, you can add all Daylite, DMI, DPS, and Daylite Touch licenses into Daylite Server Admin. This is called centralized licensing. There is no need to add licenses on every computer running Daylite. Single-users can add their license in Daylite.

Daylite Touch is licensed on a per device basis. You need 1 license for each device in use, no matter what the number of users. When you are offline, you'll use 1 license. You release the license when you go back online. For more information, see **Help > Daylite Server Admin Help**.

Migrating pre-Daylite 3.9 databases

Pre-Daylite 3.9 databases should be migrated to work with Daylite 3.9. Please verify the following check list before you begin.

Pre-migration check list:

- Backup your database by choosing File > Database > Quick Backup.
- Write down the name of the database you wish to migrate. This is especially important when you have multiple databases. You can see your database name in the toolbar located at the top of the Daylite window.
- Keep your license information handy before you migrate.

a. For single users:



Daylite user with 1 computer

1. Go to the Synchronization pane of Daylite Preferences and turn synchronization "Off" (not to be confused with offline users).
2. Download Daylite 3.9 and install it.
3. Launch Daylite 3.9.
4. Choose **Daylite > Personal Licenses** to add your license.
5. Choose **File > Database > Migrate Database**.

6. Select a database to migrate. Click **Continue**.
7. Enter the credentials for a database user with administrative privileges.
8. Click **Migrate**.

The migration tool migrates the selected database to Daylite 3.9. Once migration is completed, it displays "Migration Succeeded." Your password will be reset and the new password will be displayed. You can email, save, or print the new passwords.

9. Click **Close**.

Note: In some rare cases, the migrator may report that the database needs to be processed. Follow the on-screen prompts to be connected with Marketcircle support.

b. For multi users:

Note:

Changing your server: If you plan to migrate your database and use a new machine as your server, then do the following:

1. Perform the migration on the same machine having Daylite 3.8 or earlier version.
2. Move the database backups to the new computer.
3. Install Daylite 3.9 and Daylite Server Admin on the server machine.
4. Restore the databases on the server machine.



Multiple Daylite users sharing one database

1. Go to the Synchronization pane of Daylite Preferences and turn synchronization "Off" for each user (not to be confused with offline users).
2. **For offline users:**
 - All offline databases should be synced prior to migration.
 - Backup the master database. Make sure that no user uses Daylite 3.8 or even 3.8 offlines.
3. Download Daylite Server from [Marketcircle website](#) and install it on the server machine. This install includes Daylite Server Admin application and Daylite Server components.
4. Launch Daylite Server Admin.

5. From the Daylite Server Admin First Run window, select **Migrate an Existing Database**.

The Daylite Migrator window opens.

6. Select a database to migrate. Click **Continue**.
7. Enter the credentials for a database user with administrative privileges.
8. Click **Migrate**.

The migration tool migrates the selected database to Daylite 3.9. Once migration is completed, it displays "Migration Succeeded." Your passwords will be reset and the new passwords will be displayed. You can email, save, or print the new passwords.

9. Click **Close**.

The migrated database name shows up in the Databases pane of Daylite Server Admin.

10. Add licenses on Daylite Server Admin. Click **Licenses** and enter the serial number and license key.

11. Download Daylite 3.9 on all user machines.

12. Ensure that you recreate the offlines.

Note: In some rare cases, the migrator may report that the database needs to be processed. Follow the on-screen prompts to be connected with Marketcircle support.

Please keep in mind that to work with Daylite Server Admin, you should be logged into your computer as an administrator. You'll be required to authenticate before making any changes on Daylite Server Admin. Once you start using Daylite Server Admin, you can also migrate subsequent databases by doing the following.

To migrate a Daylite database

1. Working from the Daylite Server Admin, choose **File > Migrate Database**.

The Daylite Migrator window opens.

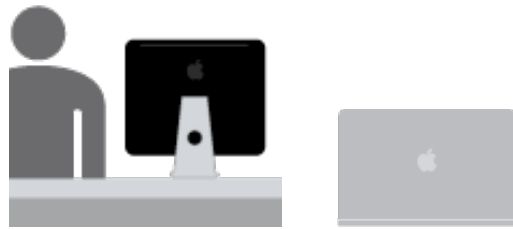
2. Select a database to migrate. Click **Continue**.
3. Enter the credentials for a database user with administrative privileges.
4. Click **Migrate**.

The migration tool migrates the selected database to Daylite 3.9. Once migration is completed, it displays "Migration Succeeded" and tells you the new passwords for all users. You can email, save, or print the new passwords.

5. Click **Close**.

The migrated database name shows up in the Databases pane of Daylite Server Admin. You can select the database to view additional details.

c. For single users with 1 desktop and 1 laptop



Single user with a desktop and laptop

In this case, follow the same procedure described for multi-users.

Migrating to Daylite 3.9 if you have multiple users on the same machine

If you have multiple user accounts for Daylite on the same machine and you want to share a database among those users, it is recommended that you install Daylite Server Admin on that machine and connect to the shared database from Daylite.

Note: Be careful not to migrate a database in both the personal and shared environments. The migration alert will come up for both. Click “**Never Migrate**” in Daylite if you’ve already migrated using Daylite Server Admin.

Uninstalling OpenBase

If you were using Daylite 3.8 or lower versions and currently switch to Daylite 3.9, then the folder containing the old version of Daylite is renamed as **Daylite 3 Legacy** in your Applications. This folder has Daylite 3.8 or older version of the application you were using and also a Daylite Legacy Uninstaller. For removing Daylite 3.8 (or older version of the application) and OpenBase Database Engine, you should run the Daylite Legacy Uninstaller.

Help and other resources

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

- 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.