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CatBase Server Installation

The CatBase Server application includes the following elements:

1. **CatBase Server:** this is the main part of the program, which will be installed on your server. The CatBase Server has been developed with 4th Dimension ("4D") and you will see various references to 4D Server within this documentation. It's the same thing as the CatBase Server.
2. **Data file:** If we have set up a database for you, you will install this on the server; if not, you will create a new data file on the server or use one of our example databases.
3. **CatBase Client:** The Client software, which will be installed on each user's computer.

System Requirements

Before you start, please make sure that your system meets the following minimum requirements:

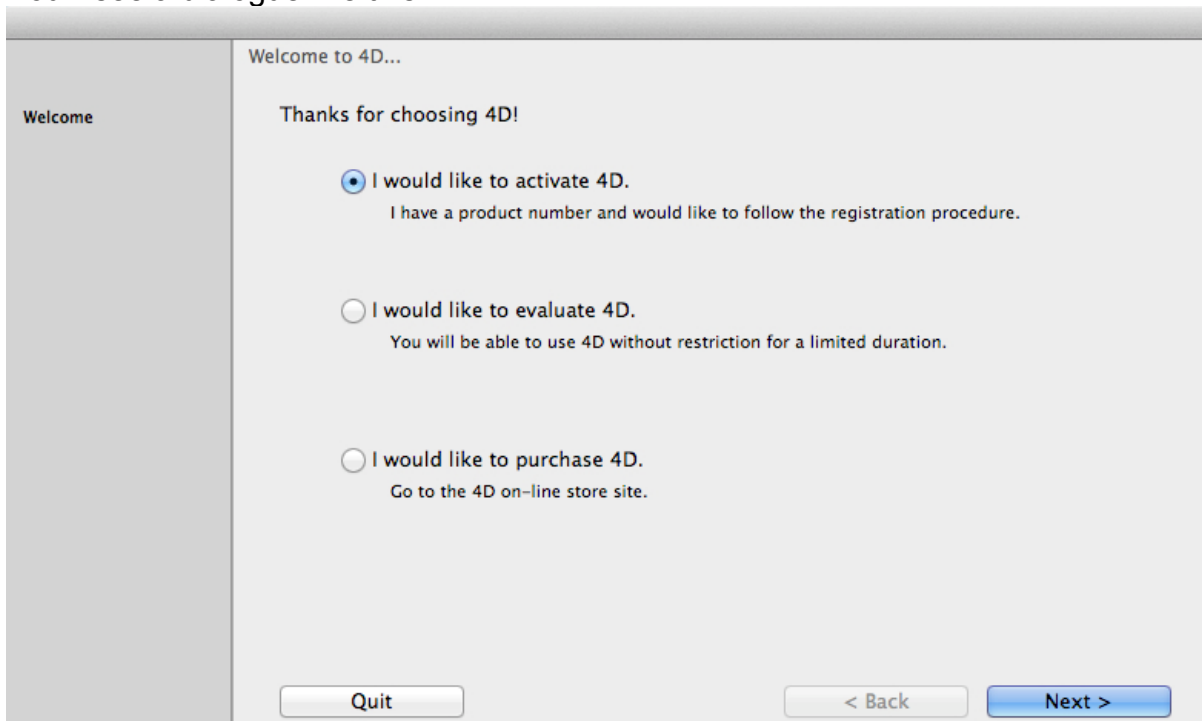
1. **Processor:** Intel Core Duo
2. **OS:**
 - a. **Windows:** Windows Vista, Windows 7, or Windows 8
 - b. **Mac:** Mac OS 10.6.8 or higher
3. **RAM:** 2Gb minimum (4Gb or more recommended)
4. **Screen Resolution:** 1280 x 1024
5. An internet connection is required for activating the CatBase Server

Installing the CatBase Server

1. Create a folder on your server, in the Documents folder or wherever you want to place it. This folder will be for your CatBase database: name it something logical like **CatBase Data** or your project name.
2. If we have set up a database for you, un-zip it and place it into your CatBase Data folder. If we have not set up a database for you, you will create a new one when you start up the CatBase Server for the first time.

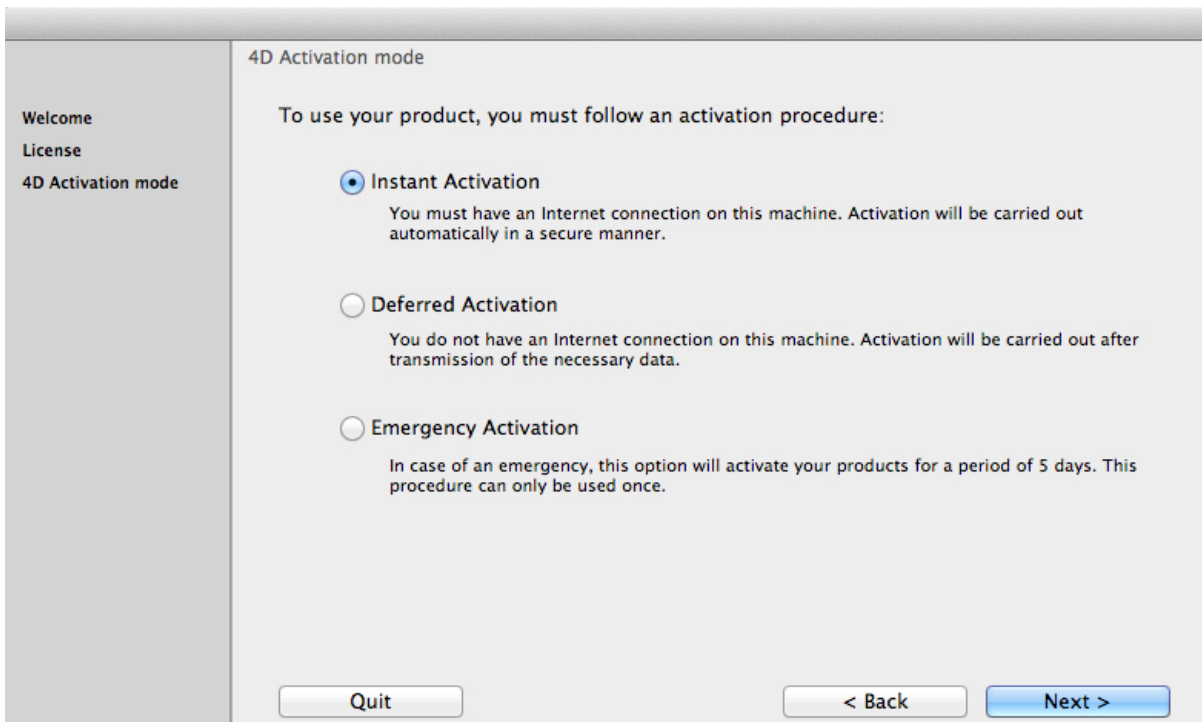
3. Download the CatBase Server application:
 - a. **Mac:** [CatBase Server disk image](#)
 - b. **Windows:** [CatBase Server for Windows installer](#)
4. Install the CatBase Server application that you just downloaded:
 - a. **Mac:** Double-click the .dmg file, then drag the CatBase Server folder into the Applications folder. (Optionally) Drag the CatBase Server application icon onto the Dock.
 - b. **Windows:** Double-click the installer and follow the on-screen instructions.
5. Start up CatBase Server:
 - a. **Mac:** Double-click the CatBase Server application in the Applications folder or click it once on the Dock.
 - b. **Windows:** Choose CatBase Server from the Windows menu or click the desktop icon, if you created one during installation
6. Enter your 4D licence number:

You'll see a dialogue like this:



This is the first of TWO licences you need to install. This one is for the 4D licence (it will be identified as such on the "Your CatBase Server Order" email you received from us.

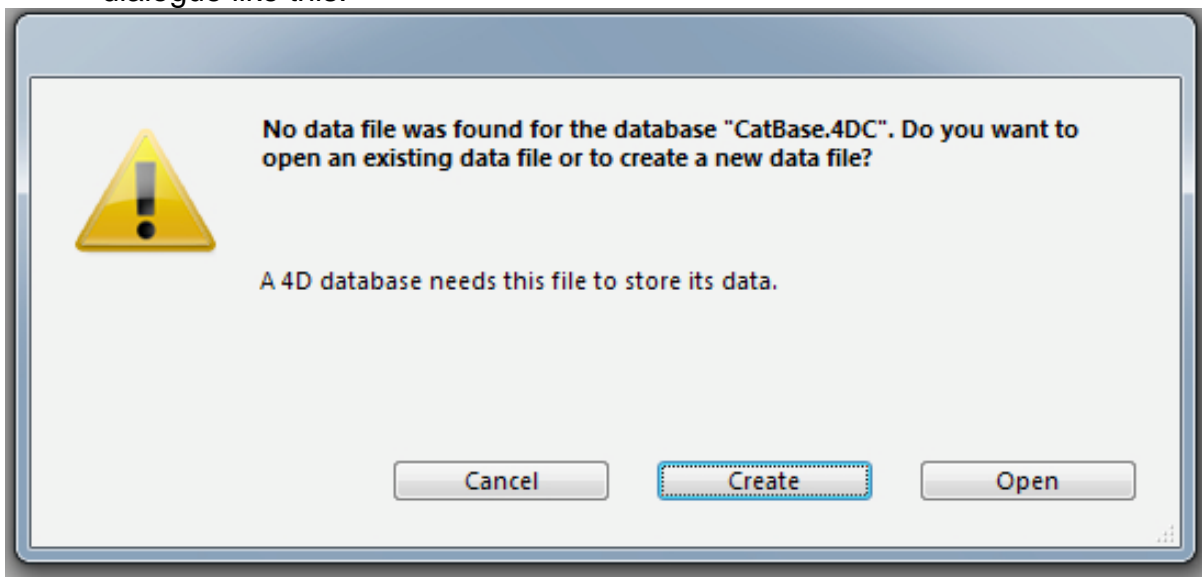
7. Leave the **I would like to activate 4D** option selected
8. Click the **Next >** button
9. Read the licence agreement on the next page, select the **I Agree** check box, and click **Next >**
10. The next page looks like this:



11. Leave **Instant Activation** selected and click **Next >**

12. Follow the instructions to create a new 4D online account (assuming that you don't already have one) and enter your 4D licence number.

13. Once your licence number has been accepted, you will probably next see a dialogue like this:

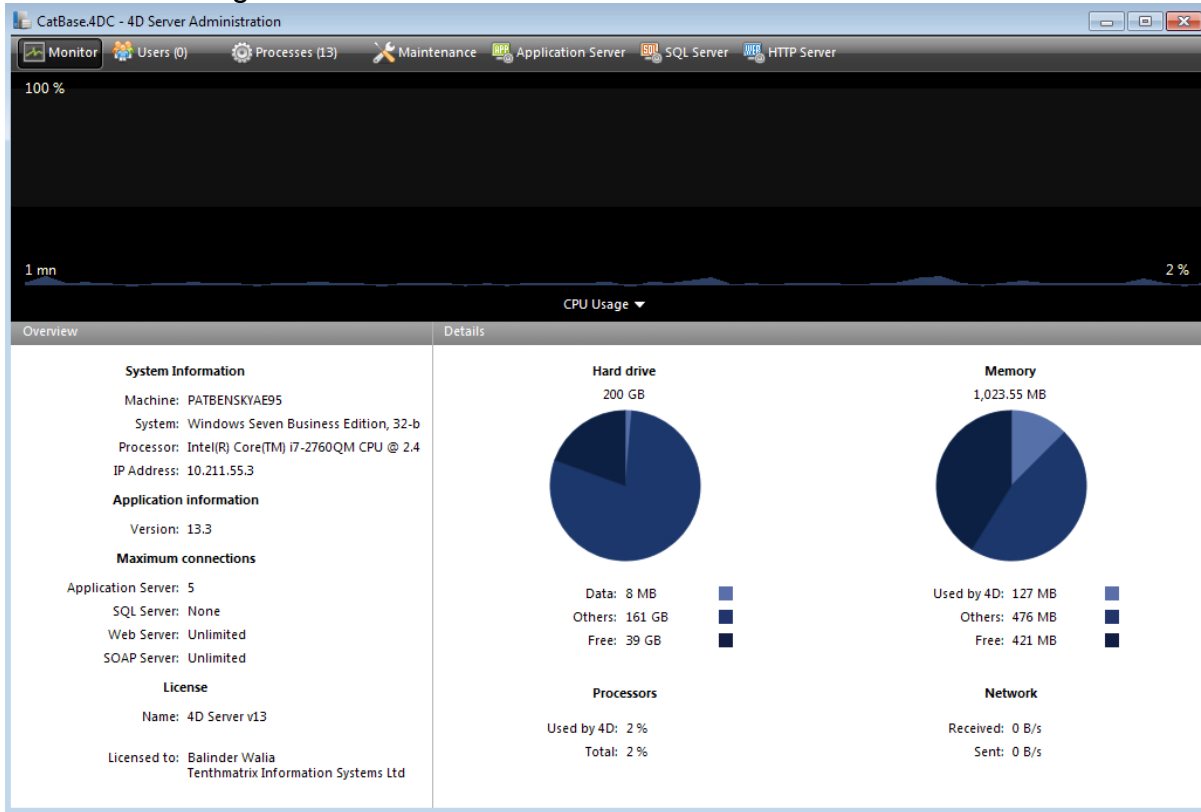


14. It's looking for your database. Either:

- a. Click on **Open** if we have set up a database for you, or if you want to use the CatBase Demo Database.
 - i. Locate your database (it will probably be in the CatBase Files folder within your Documents folder) and double-click it. It has the file extension .4DD.
- b. If you want to create a new database from scratch, click the **Create** button.
 - i. Choose the location to save your new database (eg in your Documents folder).

- ii. Enter a meaningful name for the database.
- iii. Click **Save**.
- c. You might see a few messages about building indexes. This is normal.
- d. If you have created a new database, please see our online Tutorial: [A Step-by-Step Guide to Starting a new Database Publishing Project](#)

15. When the database is open, your CatBase Server window should look something like this:



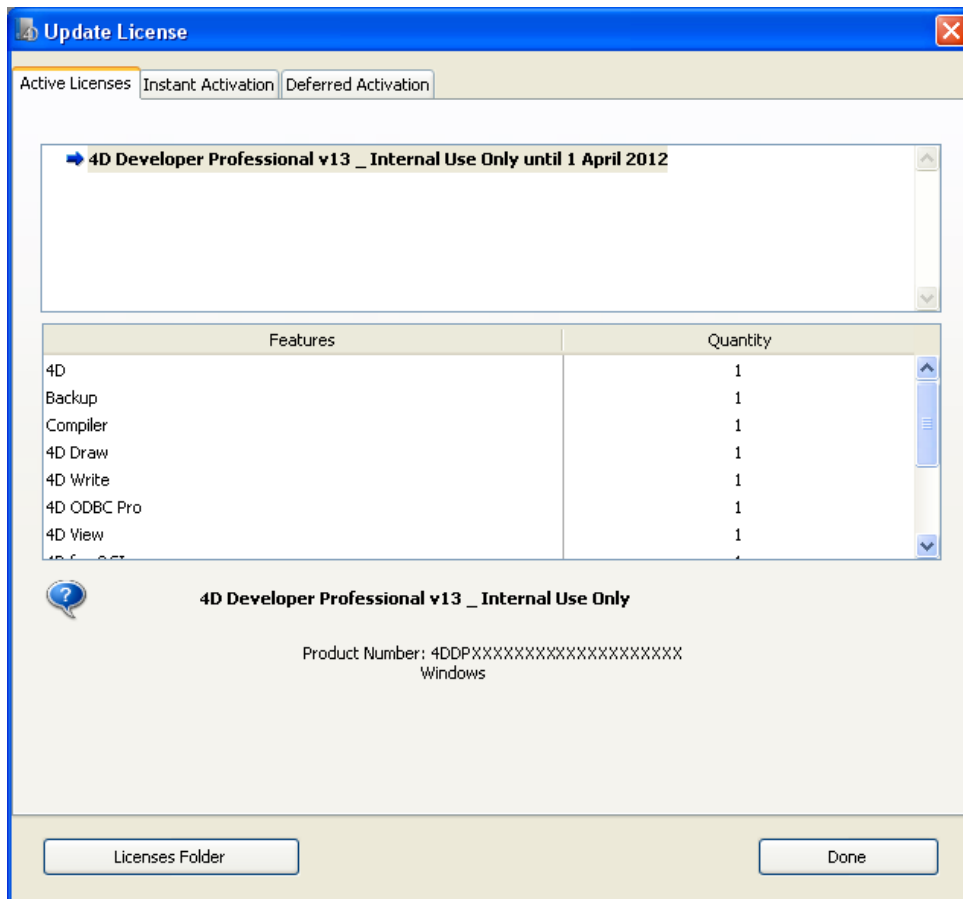
For more detailed instructions on installing the Server software, please see the [4D Server Installation Manual](#).

For detailed information about the options available in the Server Administration window, please download the [4D Server Reference manual](#).

Adding Additional Licences

The basic installation includes two User licences. If you have ordered additional User licences (or if you add any in the future), or if you have ordered any 4DWrite (Letters Module) licences, you will need to add them.

1. Choose **Update Licence ...** from the **Help** menu in the CatBase Server application. A dialogue similar to the following opens:



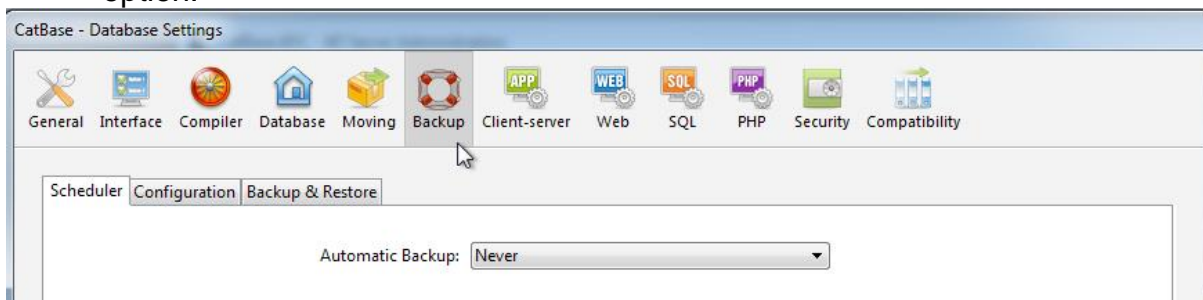
- 2.
3. Select the **Instant Activation** tab.
4. Enter the additional licence numbers in the same way as you did when you installed the main Server licence.
5. When you've entered all your licence numbers, they will be listed in the **Active Licences** tab.

You're almost ready! Just one more important thing to set up ...

Set up a Backup schedule

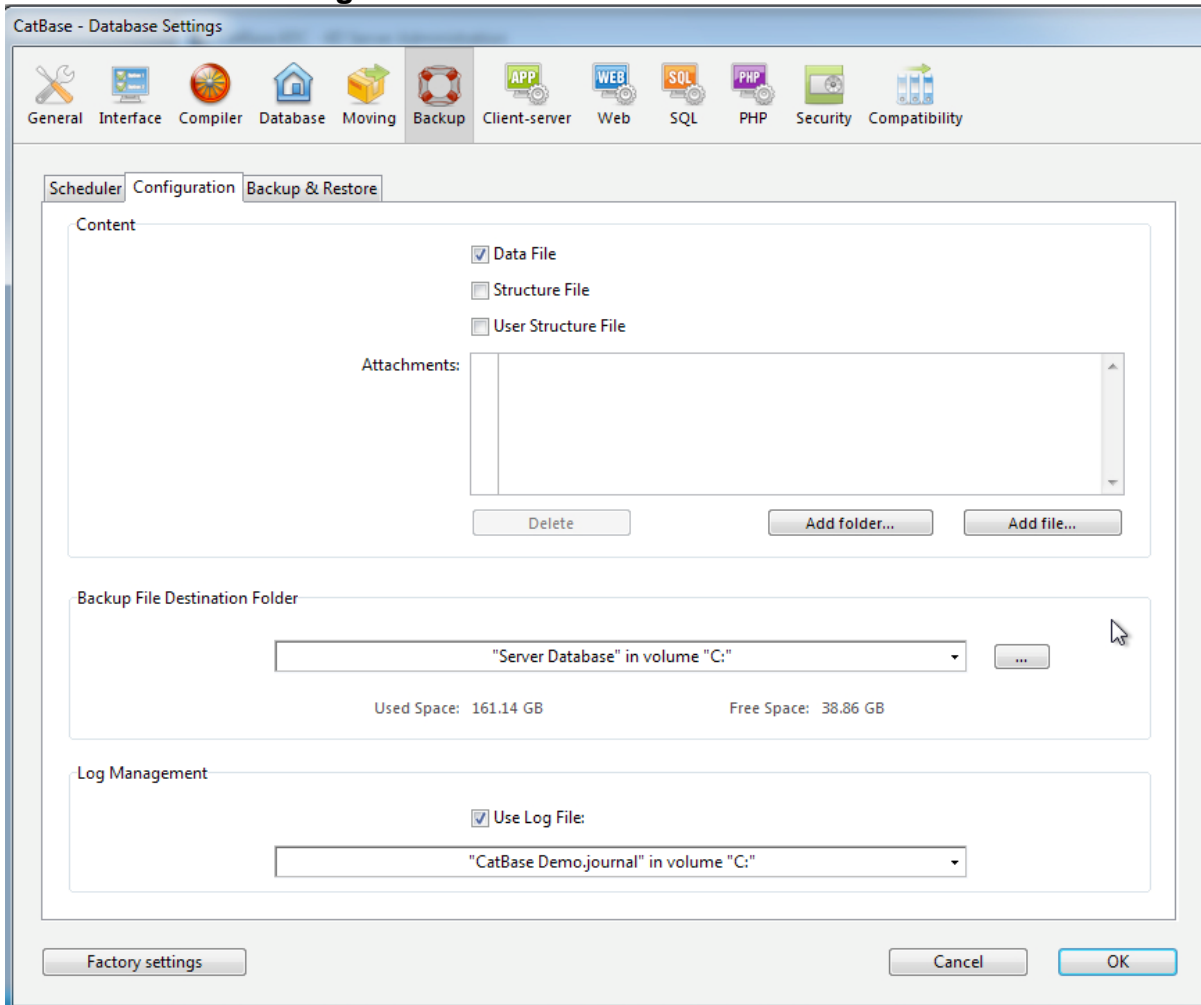
We strongly recommend that you set up a Backup schedule. This is your insurance in case something goes wrong with your database or the server.

1. Choose **Database Settings** from the **Edit** menu and select the **Backup** option:



2. Choose an option from the **Automatic Backup** dropdown menu. We recommend choosing the **Every Day** option. This will create a fresh backup at the time you specify every day.

3. Select the **Configuration** tab:



4. In the **Content** section, the important item to select for backup is the **Data File**. This is your precious data!
5. It is not essential to include the **Structure File** in your regular backups. This is the CatBase Server application.
6. **Backup File Destination Folder**: Select the location for the backups to be saved. We strongly urge you to use a volume other than the one on which your database is installed, in case the hard drive becomes damaged or crashes completely (it happens!) This could be another volume somewhere on your network, or an attached external drive, or a cloud server. Just make sure that the selected volume will always be accessible from the CatBase Server. A cloud server is a good choice (as long as you have a fast, reliable internet connection).
7. **Log Management**: By default, after each backup is made, a fresh Log File will be created. This Log File contains information about every modification that is made to the database. In the event of the database become damaged, you will be able to restore the backup and apply the Log File. This way, you will lose little or no work in the event of something disastrous happening.

Installing the CatBase Clients

The basic Server comes with two Client licences included. Additional licences can be purchased as required.

Regardless of whether your CatBase Server is running on a Macintosh or Windows machine, any combination of Mac and Windows Clients can connect to it.

1. On each client machine, download and install the CatBase Client software:
 - a. [Mac](#)
 - b. [Windows](#)
2. You can install the Client on any number of computers, but only the number licenced can be connected to the database at any one time.
3. When you start up CatBase Client, it should automatically connect to the CatBase Server. If it doesn't, please check that the CatBase Server is running.
4. You can run the Client and Server on the same machine, but this is not really recommended as it will not perform as well as it will if the CatBase Server is installed on a separate machine. If you do this, the Client might not automatically connect to the Server. In that event you'll see a Connection dialog. Enter the local IP address (127.0.0.1).

Connecting to the CatBase Server for the first time

The first time you start up a CatBase Client and connect to the CatBase Server, you'll see the CatBase Registration dialog:

Please take a moment to complete these registration details and then click the Submit button. Items shown in red are required.

Licenced Version

Trial Version

CatBase Licence Number

Company Name or Last Name

Telephone Number

Address Line 1

Address Line 2

Address Line 3

City/Town

County or State

Zip or Postal Code

Country

Contact First

Contact Last

Contact Email Address

Submit

Cancel

Error Reporting

You'll find your CatBase Licence Number in the welcome email you received from us. Complete all the required fields and click the **Submit** button.

You'll only need to do this once.

If you want to change your registration details at any time (for example, if you change your address or we issue you a new licence number), choose **Registration** from the **File** menu.