Accessing hosted websites and applications

dlib
an AXIELL product

Axiell ALM Netherlands BV

Contents

1. Introduction

Axiell ALM Netherlands offers different hosting services. With a hosting service, software which you are entitled to use is installed on a remote server and maintained by Axiell ALM Netherlands. You and other users can access that software via the internet. In this manual we distinquish between ASP (Application Service Provision) aka Saas (Software as a Service) and website hosting. These services are available separately or in combination. To access your website you use an internet browser. To access an Adlib application or other software on the server you need to log in with a user name and password, using a so-called remote desktop connection.

This user guide shows you how to log on to the hosting server, how to use FTP and how to use local sources like printers and hard drives and such.

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2. Website hosting

If you're using an Adlib (SQL Server based) hosting service to host your website while you're still hosting the actual Adlib application and database(s) at your own site, you need the ability to upload your current data to update the website regularly, because there is no live link between the website and your database. This is usually done by FTP (File Transfer Protocol), which is suited for uploading large files. When you are using an Adlib SQL database at your own site, you should be able to upload an SQL backup of your database via FTP and have it automatically restored to the central SQL Server within the Adlib hosting domain. For your convenience and for safety reasons, you don't need to do this restoration manually, so you don't have direct access to the Adlib SQL Server. Instead, a PowerShell script has been written to fulfill the restore function automatically.

If you're still using CBF databases at your own site, we need to assist you in converting and restoring a backup of your database into the hosted SQL database. A better solution is being researched.

2.1. Create a backup of your database and images

Use Microsoft SQL Server Management Studio Express or a similar tool to create backups of the SQL database. A database backup can be created as follows:

1. In Microsoft SQL Server Management Studio Express, right-click the database, and in the pop-up menu choose *Tasks > Back up*.
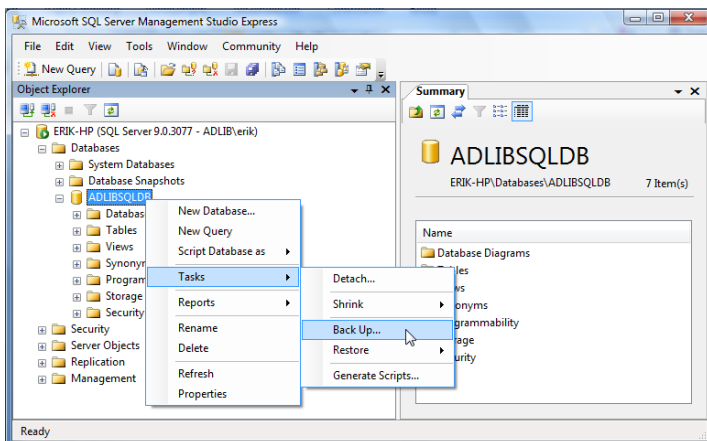
2. Set the *Backup type* to *Full*. This will copy the entire database, including transaction log, to a backup.

3. Assign a unique name to the backup, preferably one that contains a date-time reference, in the following syntax: `customer-Name+YYYYMMDDtttt`: use the name of your institurion and the current date and time. This makes identifying the most recent restore job easier.

4. Set other options (also see the *Options* tab) as desired

5. Click *OK* to generate a backup, and close this program.

6. Open Windows Explorer and make a zip file of your *images* folder.

2.2. Copy the backup to the Adlib server via FTP

On the internet, FTP is commonly used for the exchange of files. By means of FTP, computers connected to the internet can send (copy) files to each other, which can then be saved on their own hard drive and used at will. To be able to use FTP, your internet connection does need to allow this protocol; ask your system administrator for information if problems arise using FTP.

1. Look up the latest backup file of your SQL database in Windows Explorer and copy it (`Ctrl+C`). It should have a unique name. Custom FTP clients may also be used, but are not directly supported by Axiell ALM Netherlands.

2. Assuming you're already connected to the internet, enter the following FTP address, `ftp://<customer_name>.adlibhosting.com`, in the address box of Windows Explorer (replace `<customer name>` by the name of your institution) and press `Enter`. You'll have to log in with your user name and password first.
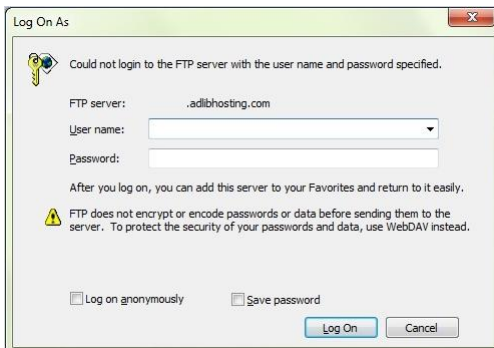
3. Windows Explorer now shows your customer root folder on the hosting server, containing several folders, for example:
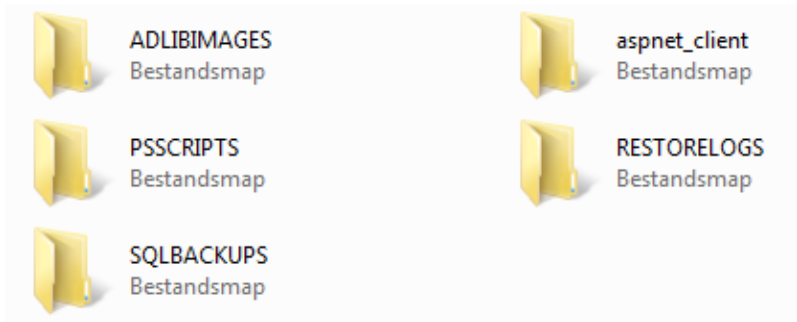
4. Double-click the *\SQLBACKUPS* folder and paste (`Ctrl+V`) the copied database backup (*.bak* file) into the opened folder. It may take a while before the file is uploaded to the server, depending on the size of the file and your internet speed.

5. What to do with the backup of your *\images* folder, depends on the setup of your website. The Adlib Helpdesk can provide more information.

6. Once the upload is completed, the connection can be closed. Your job is done. The restoration of the new backup will take place automatically at the scheduled daily time for it.
    After the automatic restore, a log can be found in the *\RESTORELOGS* folder.

3. Application hosting

If you're using an Adlib (SQL Server based) hosting service to host your Adlib application and database, and possibly your website as well, you just need to know how to log on to the hosting sever to be able to work with the available Adlib application(s), and how to print records to your local printer, to export or import records, to move or copy images and files to and from Adlib folders, and so on.

Each customer is assigned their own secure 'virtual server' to which all their user accounts are attached. When you log in, you access a private Windows account on the hosting server through which you can run your Adlib applications and selected other software. Because Adlib applications integrate with Microsoft applications such as Word, access to Microsoft Office is provided for each account. Other useful software such as Adobe Acrobat Reader (for *.pdf* files), the Winzip file compression utility and a professional virus scanner are also installed and available to each account. The possibility of a hosted e-mail service is being researched, but as yet not available. Anything else that you copy to the desktop on the hosting server will be visible to you only, whilst the disk space available to you is shared between you and your colleagues.

After logging in with your user name and your password, and having set certain login options, a private server desktop appears with icons for your software. Just double-click an icon to start the program. You can work with Adlib and other software in much the same way as if it were installed in your own office.

## 3.1. Log on to the hosting server from a pc

1. From *All programs* in the Windows 7 *Start* menu, select *Accesso-
    ries > Remote Desktop Connection*. (In Windows 10 you'll find it
    under *Start > All apps > Windows accessories > Remote Desktop
    Connection*.)
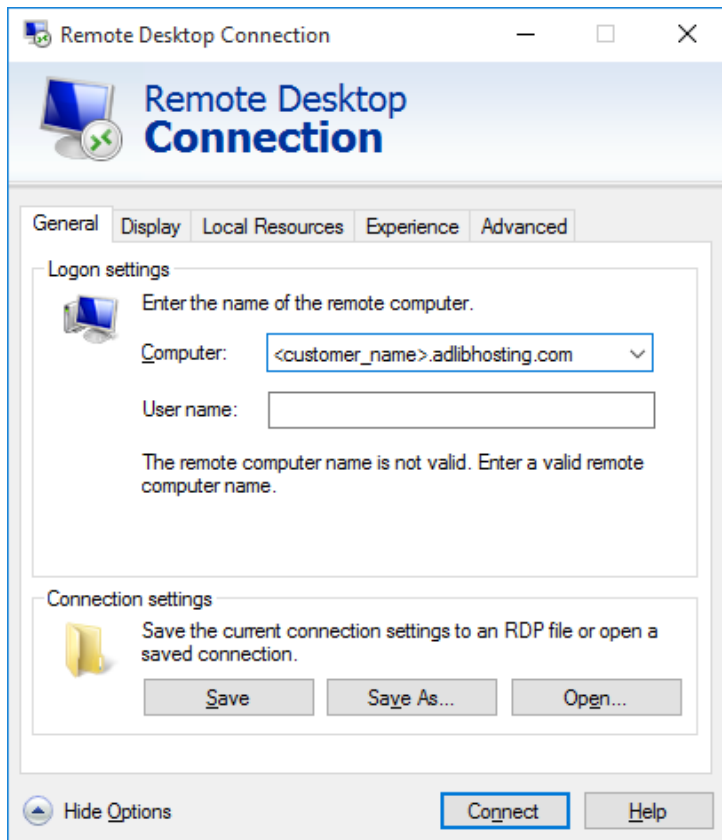
2. Enter the *Computer* to connect to. This name will have the syntax
    `<customer_name>.adlibhosting.com`. Replace `<customer_name>`
    with the name of your institution.

3. In *User name*, enter your user name preceded by the proper
    domain (probably `ADLIBHOSTING`). So the syntax of the *User name*
    to enter becomes `ADLIBHOSTING\<your_user_name>`.

Gateway settings

In some circumstances your company firewall does not allow normal RDP connections (using port 3389). In that case you'll have to set up the RDP connection to use a special gateway at Axiell ALM to access your hosting environment. Your remote desktop traffic will then be routed through the available open port (probably port 443 for HTTPS). If that is the case, then (in addition to step 3) open the *Advanced* tab in the *Remote Desktop Connection* window and click the *Settings* button. In *RD Gateway Server Settings* window that opens, underneath the *Connection settings*, mark the *Use these RD Gateway server settings* option and behind *Server name* literally enter `gateway02.adlibhosting.com`. For the *Logon method* choose *Allow me to select later*. Also mark the *Use my RD Gateway credentials for the remote computer* checkbox, before you click *OK*.
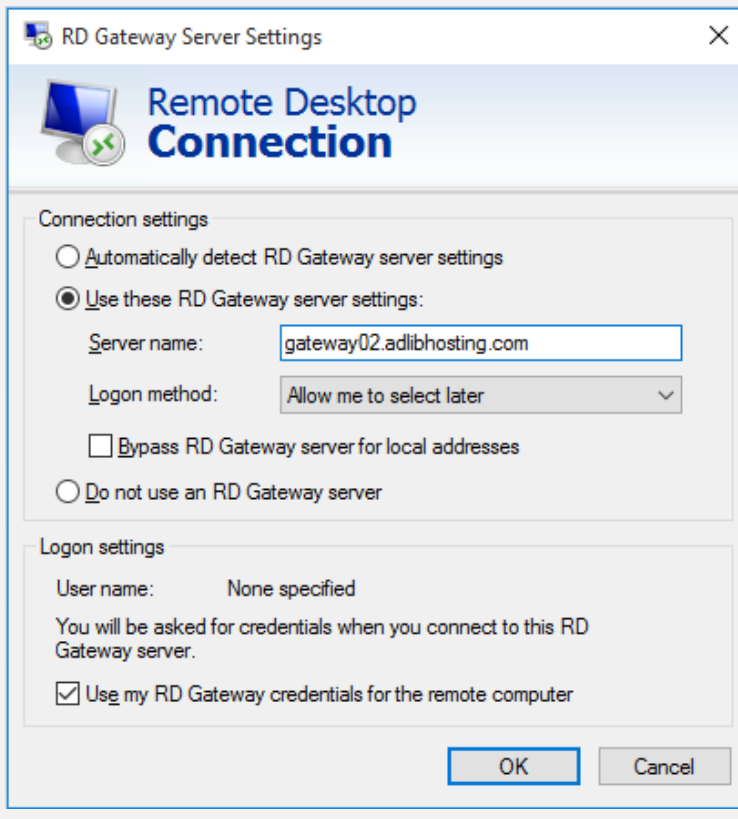
4. Open the *Local Resources* tab. When you want to be able to use your local printer* to print to, from within your Adlib application or other software on the hosting server, make sure the *Printers* checkbox is marked.
Also mark the *Clipboard* checkbox so you can copy and paste something from your computer to the hosting server and vice versa.
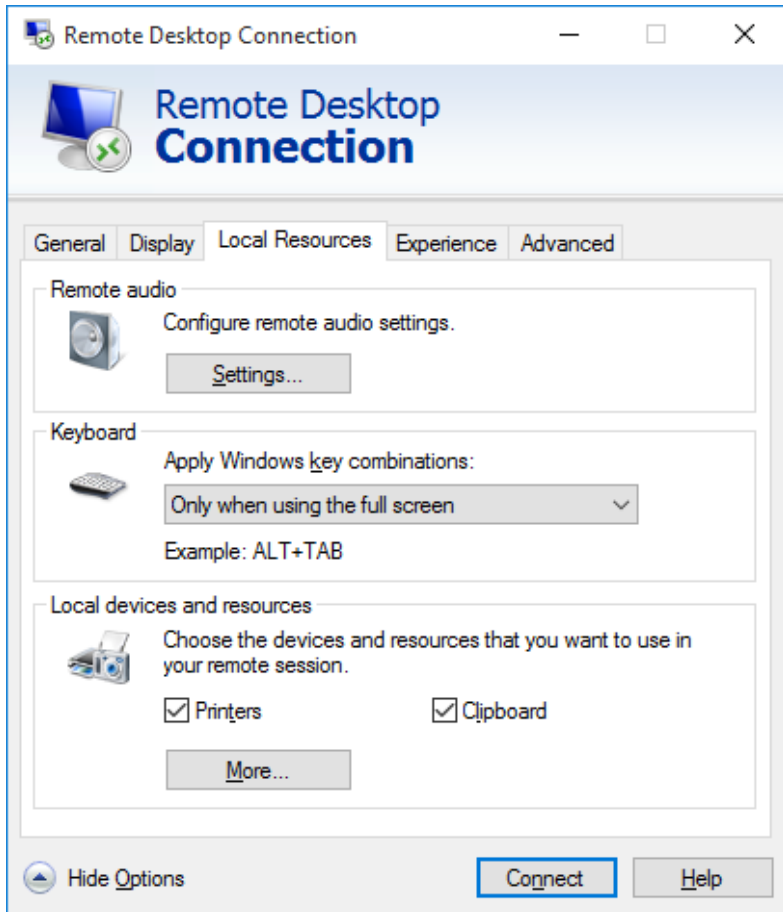
* It may be the case that your printer cannot be used from the hosting environment just like that. It usually depends on the availability of proper driver software for a printer whether it can be used from within a specific operating system. The operating

system on the hosting server is Windows 2008 R2. This operating already contains standard drivers for controlling most common printers, but if it doesn't have a driver for your particular printer, you need to provide the special driver software to us and we will install it for you. The special driver needs to be Windows 2008 R2 compatible and its type (PostScript or PCL) must match the type you are already using in your own office.

5. Click the *More…* button to select local devices and resources to share with the hosting server during your session. Only you have access to these resources, so there's no added security risk.
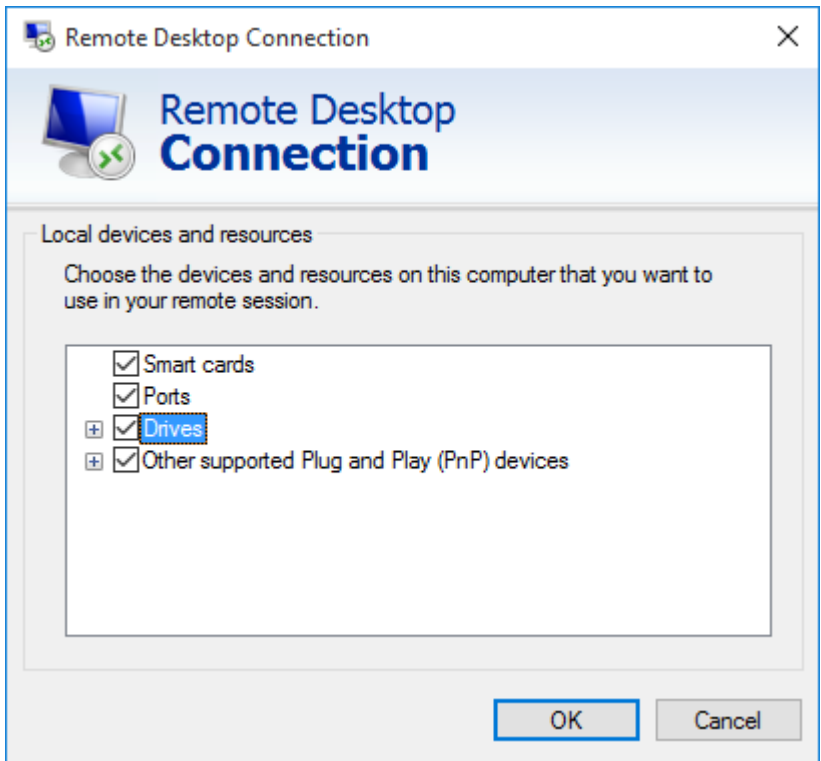
6. Click the + in front of *Drives* to unfold the list. Mark all drives which you want to access from within the hosting server.

7. Click *OK* and go back to the *General* tab. For a quick login next time, using the same settings, you can save the current settings in an *.rdp* file. Click the *Save* button to save the settings in the current *Default.rdp* file, or click *Save as…* to save it in another *.rdp* file. By saving it in the *Default.rdp* file, you make sure that next time you open the *Remote Desktop Connection* dialog, these particular settings will be loaded automatically. If your settings file is named differently, you will have to *Open…* it explicitly.

8. Click *OK* and a *Windows security* dialog on the server opens, requiring you to enter your password. Then click *OK* again to log in.

9. Your private Windows desktop on the hosting server will open, and you can work with software like it was on your local desktop. You can switch back to your local desktop at any moment by moving the mouse cursor to the connection bar at the top of the screen and clicking the minimize (-) button. If the connection bar isn't visible at first, moving the mouse cursor there will make it appear. Your remote desktop connection now appears as just another opened program in your local Windows taskbar. Clicking it will open it full screen again.
   It is important to understand the difference between your local desktop and your private desktop on the hosting server. What you see on your screen is either one of them, they don't mix. So if you see icons for starting your e-mail program and other local software you have been working with for years, you are looking at your local desktop, while if you only see the hosted Adlib application icons and a small selection of other hosted software you are looking at the desktop on the hosting server. You can switch between the two desktops while the connection is open.
   In your private Windows desktop on the hosting server you have the possibility to change your password, if you want. Simply press the `Ctrl+Alt+End` key combination (do not use the `End` key in the `NumLock` key block), select the *Change a password* option and fill out the form. Note that you must be using RDP 6.0 or later.

10. When you're finished for the day, first close ***all*** open program windows on the hosting server desktop (e.g. by clicking the white cross in the upper right corner of those windows) so that no desktop software is active on that server anymore. Only then close your session to the hosting server by clicking the close (x) button in the connection bar at the top of the *hosting* server desktop screen: this will close your connection to the server.

If you close this connection without first closing all desktop software on the server, those programs will remain opened and active, and will therefore continue to consume system resources on the server, like memory and processing time: in effect this may cause a significant performance drop of the server for your colleagues working in their own instance of the hosted Adlib applications as well as for visitors of your website!

3.2. Log on to the hosting server from a Mac

3.2.1 Using OS X 10.7 or higher

1. If you're working with a Mac using OS X 10.7 or later, you'll have to use the Microsoft Remote Desktop app. Browse your *Applications* in the *Finder* or *Dock* for the *Microsoft Remote Desktop* icon. Double-click it to open the app.


   If you can't find it you'll have to download and install it first. With an Apple ID you can get the tool from the Apple App Store: search the store for "Microsoft Remote Desktop". On the app detail page, click the *Download* button, wait for it to turn green (*Install app*) and click it again to install the app on your Mac.

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2. Assuming no remote desktop profile has been created yet, the *Microsoft Remote Desktop* app opens empty. However, if a profile for connecting to the Adlib hosting environment is already present, please jump to step 7.
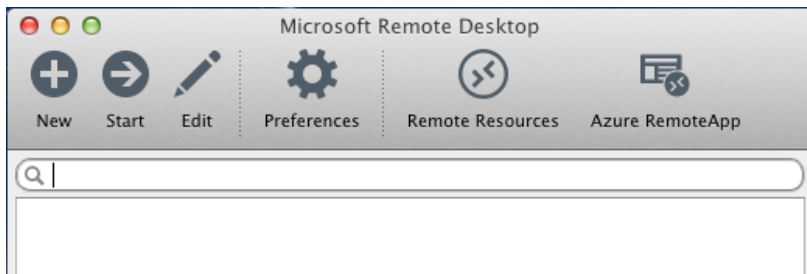
3. Click *New* to create a new profile. For *Connection name*, fill in any name to identify this new profile, e.g. Adlib Hosting. For *PC name*, enter the hosting server name to connect to. This name will have the syntax <customer_name>.adlibhosting.com. Replace

`<customer_name>` with the name of your institution for this parti-ular purpose. If you need to access our hosting server through a gateway*, then select the relevant gateway in the *Gateway* drop-down list: otherwise leave the option as is. In the *User name* field, enter your user name preceded by the proper domain (`ADLIBHOSTING`) and a backslash. The password for your login to the hosting environment needs to be entered in the *Password* field. You can leave the other settings on the *General* page as they are, except for *Use all monitors*, which can be switched off.

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* Gateway settings

For security reasons, the port (3389) used normally by the Remote Desktop Protocol to connect to your Adlib hosting environment might be blocked on your company's outgoing firewall. For these situations Adlib facilitates the hosted Remote Desktop Service gateway. This gateway can be reached using the secure HTTPS protocol (outgoing port 443).
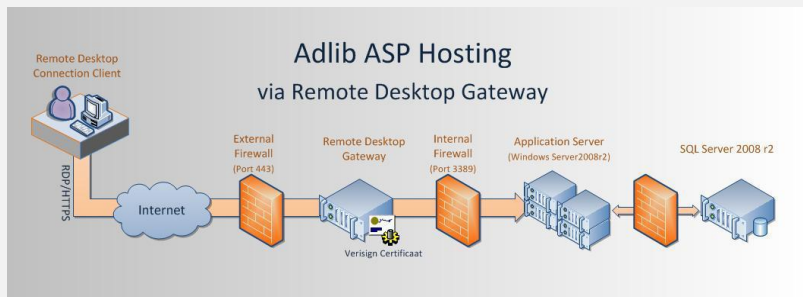

The gateway can be specified by clicking the *Preferences* icon in the *Microsoft Remote Desktop* window.
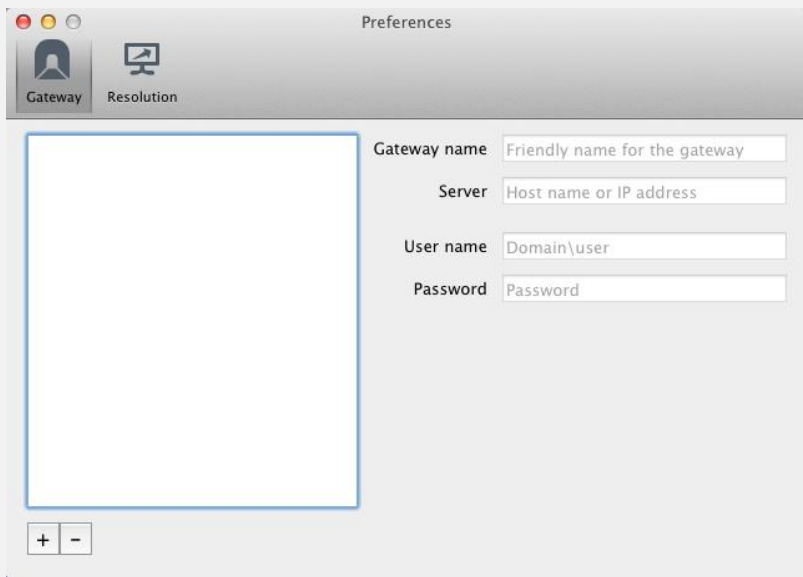
First, click the + button at the bottom of the *Preferences* window to be able to create a new gateway profile. Then specify any identifying *Gateway name* you like, e.g. `Adlib gateway`, and in the *Server* field enter: `gateway02.adlibhosting.com`
In the *User name* field, enter your user name preceded by the proper domain (`ADLIBHOSTING`) and a backslash. The password for your login to the hosting environment needs to be entered in the *Password* field

4. On the *Session* page, just mark the *Forward printing devices* option.
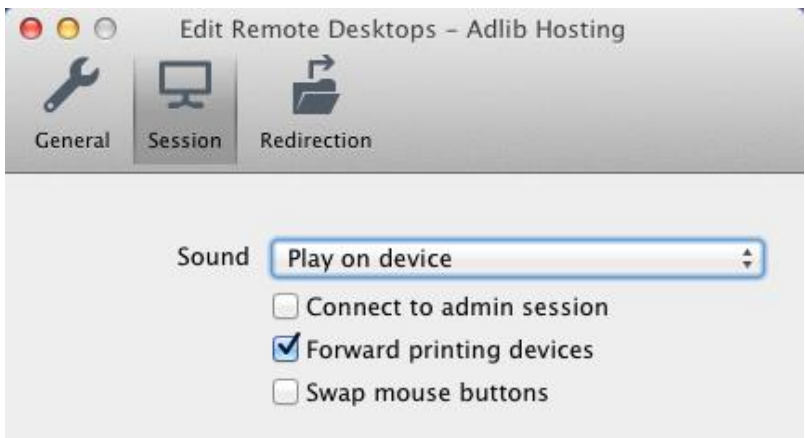
5. On the *Redirection* page you can indicate local folders to be shared with the hosting environment during your session. Only you have access to these resources, so there's no added security risk. Sharing folders is a convenient way to access your documents or other files from within the hosting environment, while you are working in Adlib. Click the + icon to add a folder: specify an identifying name for it and the path to the relevant folder.
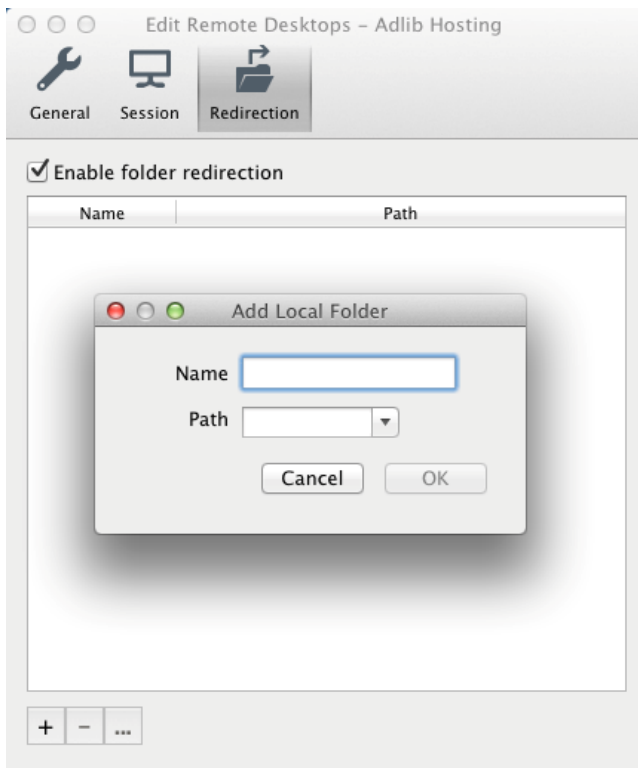
6. Close the *Edit Remote Desktops* window to store your new profile.
7. Select the profile for the Adlib hosting environment and click the *Start* icon in the toolbar to actually open the remote desktop connection to Adlib.

8. Your private Windows desktop on the hosting server will open, and you can work with software like it was on your local desktop.
    It is important to understand the difference between your local desktop and your private desktop on the hosting server. What you see on your screen is either one of them, they don't mix. So if you see icons for starting your e-mail program and other local software you have been working with for years, you are looking at your local desktop, while if you only see the hosted Adlib application icons and a small selection of other hosted software you are looking at the desktop on the hosting server. You can switch between the two desktops while the connection is open.
    In your private Windows desktop on the hosting server you have the possibility to change your password, if you want. Simply press the `Control+Option+Delete` key combination, select the *Change a password* option and fill out the form.

9. When you're finished for the day, first close **all** open program windows on the hosting server desktop so that no desktop software is active on that server anymore. Only then close your connection to the hosting server, using *Log off* in the Windows Start menu. (Never use the *Shut down* option!)
    If you close this connection without first closing all desktop software on the server, those programs will remain opened and active, and will therefore continue to consume system resources on the server, like memory and processing time: in effect this may cause a significant performance drop of the server for your colleagues working in their own instance of the hosted Adlib applications as well as for visitors of your website!

3.2.2 Using OS X 10.6 or older

1. If you're working with a Mac using OS X 10.6 or older, you'll have to use the Microsoft Remote Desktop Connection tool (for Intel-based Macs). Browse your *Applications* or *Dock* for the *Remote Desktop Connection* icon. Double-click it to open the RDC dialog.
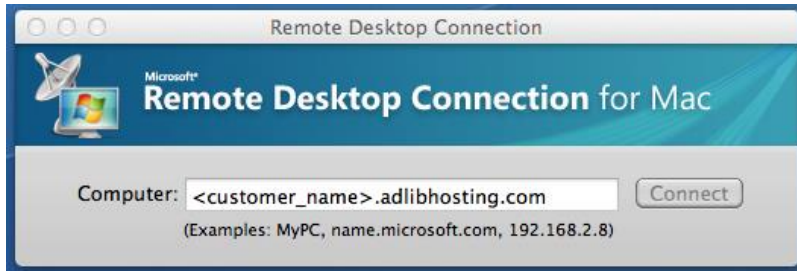

    If you can't find it you'll have to download and install it first. You

can get the tool from: http://www.microsoft.com/en-us/download/details.aspx?id=18140.

2. In the *Remote Desktop Connection* window, enter the *Computer* to connect to. This name will have the syntax `<customer_name>.adlibhosting.com`. Replace `<customer_name>` with the name of your institution.

3. In the RDC menu click *Preferences* to open the settings dialog. In *User name*, enter your user name, and in *Password* enter your password. In domain you have to enter the proper domain (probably `ADLIBHOSTING`).

4. Open the *Drives* page in this dialog. Select *All disk drives* or specific folders to share with the hosting server during your session. Only you have access to these resources, so there's no added security risk when you select *All disk drives*. You may ignore the warning.

5. Open the *Printers* page. Select the printers to share. (In the example below no printers were connected to the Mac.)
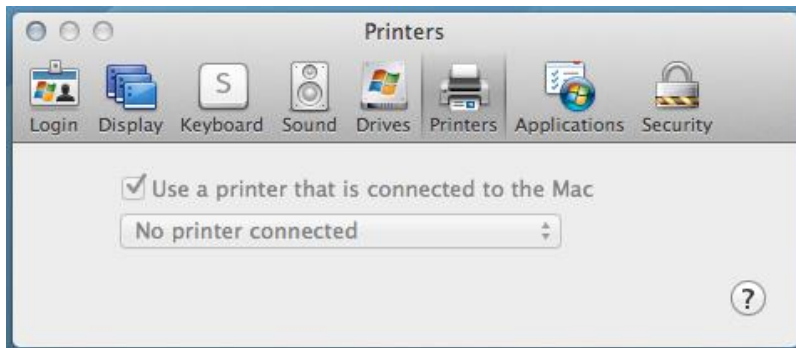
6. Close this dialog and click the *Connect* button in the *Remote Desktop Connection* window.

7. It is possible that a *Windows security* dialog on the server opens, requiring you to enter your password. Then click *OK* again to log in.

8. Your private Windows desktop on the hosting server will open, and you can work with software like it was on your local desktop.
It is important to understand the difference between your local desktop and your private desktop on the hosting server. What you see on your screen is either one of them, they don't mix. So if you see icons for starting your e-mail program and other local software you have been working with for years, you are looking at your local desktop, while if you only see the hosted Adlib application icons and a small selection of other hosted software you are looking at the desktop on the hosting server. You can switch between the two desktops while the connection is open.
In your private Windows desktop on the hosting server you have the possibility to change your password, if you want. Simply press the `Control+Option+Delete` key combination, select the *Change a password* option and fill out the form. Note that you must be using RDC 2.0 or later.

9. When you're finished for the day, first close ***all*** open program windows on the hosting server desktop so that no desktop software is active on that server anymore. Only then close your connection to the hosting server, using *Log off* in the Windows Start menu. (Never use the *Shut down* option!)

If you close this connection without first closing all desktop software on the server, those programs will remain opened and active, and will therefore continue to consume system resources on the server, like memory and processing time: in effect this may cause a significant performance drop of the server for your colleagues working in their own instance of the hosted Adlib applications as well as for visitors of your website!