



Install and setup

Guides for Merlin Server

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Install and setup - as of March 2019

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This quick guide gives some installation and setup tips for Merlin Server.

How to install

Installing Merlin Server is easy. Just **download** the latest version of Merlin Server from [website](#), **double click** the expanded application (located in the ~/Downloads folder), accept the prompt **to move to the Applications Folder**, and enter an admin password, which installs the helper components.



On Sierra you might first need to drag Merlin Server out of the ~/Downloads folder otherwise Sierra might block it and this may interfere with automatic installation of Merlin Server. Just move it directly to the Application folder OR to your ~/Desktop and double click it from there.

Merlin Server will start automatically after installation, and will be ready for you to set it up.



To ensure Merlin Server installed correctly, Merlin Server can check the installation. To do so, just click »Check Installation« from the »File« menu.

Where to install?

You normally install one instance of Merlin Server on a stationary Mac. There, you can share all the documents you need users to be able access and subscribe to.



You normally don't install both Merlin Server and Merlin Project on the same Mac. In particular, don't install Merlin Server on a non-stationary Mac. Merlin Server should be accessible typically at all times, and if you remove a laptop from the network and/or need access from the internet you would need to configure port forwarding rules again and again depending on the new router of the LAN you move your laptop to.

It doesn't necessarily have to be an OS X server, but it helps if your server is easily accessible within your LAN (e.g. it has more than one network interface and thus offers access from more than one LAN) and possibly from the internet (when you already have port forwarding rules for other services, you simply enable port forwarding for the Merlin Server services in a similar way).

Which services to start?

Merlin Server offers three services: *Sync*, *Publishing*, and *Web*.

Once you start the *Sync* service, Merlin Server can share documents for access by Merlin Project users.

Publishing and *Web* services are optional. Do not start them if you don't need their

functionality.



You cannot use the *Publishing* and *Web* services without a *Sync* service.

For Merlin Server to offer projects, you need to share at least one document. You can share documents using the Merlin Server functionality and the »Documents« area.

Optionally you can enter a »Remote Management Password« in the »Documents« area. A user in possession of the Remote Management Password can then share documents with this server over Merlin Project on a Mac or an iOS device.

License

You can try Merlin Server for free for 30 days without a license.

If you choose to purchase a Merlin Server license, just use the online shop on Merlin Server's product page and enter your license in the »Licenses« area.

Advanced

Hostname

If you don't explicitly select a hostname for the *Sync* or *Web* services, Merlin Server will automatically generate it based on the Mac name or its IP address.

If your Mac is accessible over the internet using a specific hostname (for example myhost.mywebpace.com), you can enter it in the edit field.



An unresolvable hostname will prevent Merlin Server from being accessed and therefore not get accepted.

Certificates

Merlin Server services use SSL to encrypt data communications. SSL allows a secure connection to be established to the server and requires an SSL certificate. An organization needs to install the SSL certificate on its server to initiate a secure session. Once a secure connection is established, all traffic between the server and the client application (in this case: Merlin Project on macOS and iOS, or a web browser) will be secure.

Merlin Server helps you in that it creates a self-assigned certificate for your Mac automatically. As such, there is no need for you to buy an SSL certificate just for test reasons. As self-assigned certificates are not validated by trusted certificate authorities, users accessing the server for the first time need to trust the self-assigned certificate once.

If you choose to purchase Merlin Server and you have many users who need frequent access to it, consider buying a SSL certificate from a trusted certificate authority to replace the self-assigned one.

To add your certificate, just use the »Certificates« area of Merlin Server.

Port forwarding on router

If you only need access to Merlin Server within your LAN, there is no need to enable port forwarding rules on your router.

If you need access to the **Sync** service over the internet, forward port 7190 tcp/udp to the Mac running the **Sync** service of Merlin Server.

If you need access to the **Web** service over the internet, forward port 7180 tcp/udp to the Mac running the **Web** service of Merlin Server.

Firewall

If you have enabled the macOS firewall and checked the option *Automatically allow signed software to receive incoming connections* you don't need to do anything else. Merlin Server is signed software so it adds itself automatically to the firewall exceptions.

Restricting access to specific users

There is no specific user management option in Merlin Server. To restrict access to documents, open the documents in Merlin Project on a Mac, configure user-resources, and set the according permissions.

Restrict visibility to authenticated users

When a project is protected by user-resources its visibility in the Merlin Server Documents list can be restricted by the »Visibility > For authenticated users« option.

To enable this option, you first need to open the document in Merlin Project. Once you change the »Visibility > For authenticated users« option under the project settings, save and sync the project to the Merlin Server. The next time a user accesses the Documents list of Merlin Server, for the document to appear in the list the user needs to login first as a user-resource configured in the project.

Cascaded installation

If you need to distribute the network and work load, you can install Merlin Server on more than one Mac. In this case, the Merlin Server running the **Sync** service acts as the master. A Merlin Server running on another Mac, which for example is to offer the **Web** service or perform **Publishing** actions, needs to connect to the master Merlin **Sync** Server to access the shared documents. To do so, select the master Merlin **Sync** Server as the **Data Source**.

To do so, use its IP or hostname followed by the port that the Sync server is currently using. By default it is 7190.

For example: <https://192.168.188.36:7190>



Disable the *Sync* service on any instance of Merlin Server if it is not running as master. When entering a password for a new *Data Source*, use the **Master password** of the master Merlin *Sync* Server.