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Preface

Welcome to FileMaker® Server 9. FileMaker Server is a dedicated database server that opens FileMaker Pro files, makes them available to other machines on a network, and publishes FileMaker data in web pages on the Internet or a company’s intranet.

Before you install, confirm that your machines meet the minimum requirements listed below.

System requirements for FileMaker Server

This section provides the minimum and recommended requirements for running FileMaker Server on the following systems:

- Mac OS X and Mac OS X Server version 10.4.x (Intel-based and PowerPC-based Macintosh computers)
- Windows 2000 Server
- Windows Server 2003
- Windows XP

Note For information on systems that are not listed here, see www.filemaker.com.
**FileMaker Server Getting Started Guide**

### Mac OS X and Mac OS X Server version 10.4.x (Intel-based Macintosh computers)

<table>
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<td>Java</td>
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### Mac OS X and Mac OS X Server version 10.4.x (PowerPC-based Macintosh computers)

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### Windows 2000 Server

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<tr>
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<td>Dual CPU/Core Duo</td>
<td>Pentium 2.4 GHz</td>
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<td>RAM</td>
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<td>80 GB</td>
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<td>Software</td>
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<tr>
<td>OS</td>
<td>Windows 2000 Server (SP4)</td>
<td>Windows 2000 Server (SP4)</td>
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<tr>
<td>Web server</td>
<td>IIS 5.0</td>
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<td>PHP</td>
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<td>Java</td>
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### Windows Server 2003

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<td>Hardware</td>
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Windows XP

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<td>PHP</td>
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<td>PHP 4.3</td>
</tr>
<tr>
<td>Java</td>
<td>6</td>
<td>6</td>
</tr>
</tbody>
</table>

System requirements for Admin Console and site assistants

You can use the applications that come with FileMaker Server — FileMaker Server Admin Console, PHP Site Assistant, and XSLT Site Assistant — on machines that have network access to FileMaker Server. These applications require Java Runtime Environment version 5 at a minimum. For Windows Vista, the minimum requirement is version 6. The supported platforms for these applications are:

- Mac OS X and Mac OS X Server version 10.4.x (Intel-based and PowerPC-based Macintosh computers)
- Windows 2000 Server
- Windows Server 2003
- Windows XP
- Windows Vista
**Supported client applications**

FileMaker Server supports the following client applications:

- FileMaker Pro 7, 8, 8.5, and 9
- Web browsers (or other applications) accessing data through the FileMaker Server 9 Web Publishing Engine
  
  For Instant Web Publishing (FileMaker Server 9 Advanced license required), the supported web browsers are:

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Firefox 2.0</td>
<td>Firefox 2.0</td>
</tr>
<tr>
<td>Internet Explorer 6.0 and 7.0</td>
<td>Safari 1.2, 1.3 (Mac OS X 10.3), or Safari 2.0 (Mac OS X 10.4)</td>
</tr>
</tbody>
</table>

- ODBC (Open Database Connectivity) and JDBC (Java Database Connectivity) client applications using the FileMaker client drivers (FileMaker Server Advanced license required).

Your copy of FileMaker Server supports one of the following client configurations:

<table>
<thead>
<tr>
<th>FileMaker Server</th>
<th>FileMaker Server Advanced</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 250 FileMaker Pro clients</td>
<td>Up to 250 FileMaker Pro clients</td>
</tr>
<tr>
<td>Up to 125 hosted databases</td>
<td>Up to 125 hosted databases</td>
</tr>
<tr>
<td>Up to a total of 100 Custom Web Publishing sessions</td>
<td>Up to a total of 100 Custom Web Publishing and Instant Web Publishing sessions</td>
</tr>
<tr>
<td></td>
<td>Up to a total of 50 ODBC and JDBC clients</td>
</tr>
</tbody>
</table>
About the license key

FileMaker software comes with a unique, 35-character license key. Do not lose this license key. We recommend that you keep the license key in a safe place in case the software ever needs to be reinstalled.

You can find your license key(s) on the back of the CD sleeve. If you paid for your software electronically, you received an email with a link to a PDF file with your license key.

The license key ensures adherence to the single user license agreement, which generally allows for use of one (1) copy of the Software on a single machine or a single multiple-machine deployment at a time (refer to your Software License). If the license key is invalid or if another copy of the software installed with that same license key is running on the network, the FileMaker Server software displays an error message and does not start.

You can choose to deploy FileMaker Server components across multiple machines that work together to form a single FileMaker Server deployment. You must have a unique license key for each multiple-machine deployment, or obtain a volume license for more than one deployment. You must license one copy of FileMaker Server for each deployment.
Updating the FileMaker Server 9 license

To update your license from a trial version of FileMaker Server 9 or from FileMaker Server 9 to FileMaker Server 9 Advanced on the same machine, you must update your FileMaker Server license key.

To update the FileMaker Server license of an existing deployment:

1. From the FileMaker Server Admin Console, choose Help menu > Update FileMaker Server License. See “Starting Admin Console” on page 67 for how to start the Admin Console.

2. In the Update License Key dialog box, enter the information required, then click Update.

Note To move your FileMaker Server 9 deployment to a new machine or to upgrade from an earlier version of FileMaker Server, see chapter 5, “Upgrading or moving an existing installation.”

Where to go from here

- To install on a single machine, see chapter 1, “Installation quick start.”
- To install on multiple machines, see chapter 2, “Deploying FileMaker Server across multiple machines.”
- To move from an existing installation of FileMaker Server, see chapter 5, “Upgrading or moving an existing installation.”
Chapter 1

Installation quick start

This chapter explains how to install FileMaker Server on a single machine.

Before you begin

Here is a list of things you must do before installing FileMaker Server:

- To install on more than one machine, see chapter 2, “Deploying FileMaker Server across multiple machines.”
- To enable web publishing, ensure that the web server is enabled. See chapter 6, “Setting up the web server.”
- If your server computer has a firewall, open the necessary ports in the firewall so that FileMaker Server can communicate with users and administrators:
  - Required on all deployments: 5003, 16000, and 16001.
  - Additionally required for web publishing: 80.
  - Ports 16004, 16006, 16008, 16010, 16012, 16014, 16016, 16018, 50003, and 50006 must be available on the machine, but not open in the firewall. For more information, see “One-machine deployment” on page 32.

Note  If you are already running FileMaker Pro on the same machine, you must quit FileMaker Pro before installing FileMaker Server.

- To upgrade from an earlier version of FileMaker Server, see chapter 5, “Upgrading or moving an existing installation.” To upgrade to FileMaker Server Advanced, see “Updating the FileMaker Server 9 license” on page 13.
- Locate your license key. See “About the license key” on page 12.
For best performance, run FileMaker Server on a dedicated machine reserved for use as a database server. When FileMaker Server is hosting many clients or a large number of database files, it uses a high level of processor, hard disk, and network capacity. Other processor-intensive software or heavy network traffic on the same machine will cause FileMaker Server to run more slowly and degrade the performance of FileMaker Pro on client machines.

To improve performance:

- Avoid installing FileMaker Server on a machine that is a user’s primary workstation.
- Avoid using the machine running FileMaker Server as an email, print, or network file server.
- Do not use system backup software to back up databases hosted by FileMaker Server. Instead use FileMaker Server Admin Console to schedule backups of databases.
- Do not use anti-virus software to scan the folders that contain hosted database files.
- Disable screen savers and sleep (or hibernate and standby) mode on the server. These features reduce performance or suspend access to hosted databases.
- Use a fast hard disk.
- Turn off Indexing Service (Windows), Spotlight (Mac OS), or any other third-party file indexing software. This feature reduces performance.

Also keep in mind the following:

- You cannot run two different versions of FileMaker Server on the same machine at the same time.
- Because some DHCP servers cycle IP addresses, FileMaker recommends using a static IP address.
Chapter 1 | Installation quick start

Installing FileMaker Server on a single machine

1. Insert the CD into the drive or follow your electronic download instructions.
2. Double-click the installation icon.
3. Windows: Select a language, then click OK.
4. Review and accept the end user license agreement.
5. Select Single Machine and click Next.
6. Enter your license key information and click Install.
   FileMaker Server begins to install. This process may take several minutes.
7. If you don’t have Java Runtime Environment version 5 at a minimum, you are prompted to install it.
   - **Windows**: You can allow the FileMaker Server installer to install Java Runtime Environment version 6.
   - **Mac OS**: Java is part of the standard Mac OS installation. If you don’t have Java installed, use Software Update to download it and then re-run the installer.
8. After the software has been successfully installed, start the Deployment assistant.

- **Windows:** In the last step of the installer, enable Start the Deployment assistant, then click Finish.
- **Mac OS:** Click Continue when prompted to start the Deployment assistant.

If you have the Open “safe” files after downloading setting disabled in Safari, locate admin_console_webstart.jnlp in your download folder. Double-click this file to start the Deployment assistant.

If you want, you can stop now and start the Deployment assistant later. To deploy FileMaker Server at a later time:

- **Windows:** Click Start menu > Programs > FileMaker Server > FMS 9 Start Page.
- **Mac OS:** Double-click the FMS 9 Start Page shortcut on the desktop.
Installation quick start


10. Click Run (Windows) or Trust (Mac OS) to respond to the security message.
11. In the first step of the Deployment assistant, assign the user name and password you want to use whenever you log into Admin Console. Click Next.

   **Note**  User Name is not case-sensitive. Password is case-sensitive.

12. Specify a name, description, and contact information for this deployment of FileMaker Server, then click Next. This information will appear on the FileMaker Server Admin Console Start Page. The Server Name is displayed to FileMaker Pro users in the Open Remote dialog box.
13. If you purchased a FileMaker Server Advanced license, you can enable a hosted FileMaker Pro file to be a data source via ODBC and JDBC. Click Yes, enable ODBC/JDBC or No, do not enable ODBC/JDBC. Click Next.

**Important** This feature allows clients to use FileMaker files as data sources using ODBC and JDBC. This feature is not needed to host FileMaker Pro databases that access ODBC data sources. For more information, see FileMaker Pro Help.

14. If you want to publish FileMaker data on the internet or intranet, click Yes, enable Web Publishing. Otherwise, click No, do not enable Web Publishing. Then click Next. Continue with step 17 if you are not enabling web publishing.

**Note** To use web publishing, the web server must be installed and running. See chapter 6, “Setting up the web server.”
15. Select the web publishing technologies you want to use and click Next.

- You can install the FileMaker Server supported version of the PHP engine (PHP 5.2.x), or you can use your own PHP engine. If you already have a PHP engine installed and choose to use the FileMaker Server supported PHP engine, your currently installed PHP engine will be disabled.

- If you use your own PHP engine, you must manually install the FileMaker API for PHP to use PHP publishing. See FileMaker Server Custom Web Publishing with PHP for more information.

**Note** Instant Web Publishing requires a FileMaker Server Advanced license.
16. Select a web server and click Next.
   - If the Deployment assistant fails to detect the web server, see chapter 6, “Setting up the web server.”
   - If you see Web Server Test Failed, the Deployment assistant detects but cannot communicate with the web server. For more information, see “Troubleshooting” on page 60.
   - To configure this web server setting later, click Skip this step and select a web server later.

17. A deployment summary appears. Click Finish or click Back to change any of your choices.
18. FileMaker Server is being deployed. This may take a few minutes.


If you don’t see the Welcome dialog box, open a web browser and enter http://localhost:16000.

**Note** You can register FileMaker Server and verify the FileMaker Server deployment now or later. See “Next steps” on page 27.
20. In the FileMaker Server Overview pane, note the IP address of the server.

Tip Write down the IP address so that you can start the Admin Console from another computer.

**Windows:** When Admin Console starts and the firewall is on, an alert displays. Click Unblock to start Admin Console.
Next steps

Now that you have deployed FileMaker Server, get started using your new software.

1. **Start Admin Console**: See “Starting Admin Console” on page 67.
2. **Test your installation**: FileMaker Server provides a sample database and a one-click method to verify that your installation is working. See chapter 3, “Testing your deployment.”
3. **Register your software**: Register your copy of FileMaker Server. See “Registration and customer support” on page 91.
4. **Administer FileMaker Server**: For information on how to upload databases, schedule backups, and other regular tasks, see chapter 4, “Administration overview.”
Chapter 2

Deploying FileMaker Server across multiple machines

FileMaker Server allows you to deploy its components on multiple machines to improve overall performance. In many environments, a single-machine deployment provides sufficient performance for web publishing. However, if FileMaker Server will be used frequently by internet clients accessing data with Instant Web Publishing, XSLT, or PHP, then you can deploy the components of FileMaker Server across two or three machines.

You can first deploy FileMaker Server on fewer machines. If the web publishing load increases, you can change your initial deployment to improve FileMaker Server’s performance.

*Note* If you’re not using web publishing, you don’t gain performance improvements from a multiple-machine deployment.
Deployment alternatives

The diagram below shows the major components of FileMaker Server. You can deploy them all on one machine or across two or three machines. The operating systems of the machines can be all Windows, all Mac OS, or any combination of the two.

FileMaker Server components

FileMaker Server uses the following components:

- **Web Server**: FileMaker Server requires Internet Information Services (IIS) on Windows or an Apache web server on Mac OS. For Windows, install and enable IIS before installing the Web Server Module. The Apache web server is installed as part of Mac OS, but you need to enable web sharing.

- **Web Server Module**: this FileMaker Server software component is installed on the web server host machine. The Web Server Module enables the Web Publishing Engine to connect to the web server.

- **Web Publishing Engine**: provides the Custom Web Publishing services for databases hosted by FileMaker Server and the Instant Web Publishing services (for FileMaker Server Advanced).
Chapter 2 | Deploying FileMaker Server across multiple machines

- **PHP Engine**: for Custom Web Publishing with PHP, FileMaker Server requires a PHP engine to respond to requests from the web server and to process PHP code. FileMaker Server includes a PHP engine and the FileMaker API for PHP. When PHP code calls the FileMaker API for PHP, those calls are interpreted and sent to the Web Publishing Engine.

- **Database Server**: hosts the databases that you share with FileMaker Pro users and publish on the web. In a multiple-machine deployment, the machine running the Database Server is called the *master* machine. See the description below.

- **Admin Console**: runs on any client computer from which you want to configure and administer FileMaker Server.

When you deploy FileMaker Server across two or three machines, one machine is always the master and the others are workers.

- The **master machine** is always the machine on which the Database Server is deployed.
- The **worker machines** are the machines that run the Web Publishing Engine and the web server.

The master communicates with the workers to handle database requests from users, configure the settings on all machines, and monitor the status and activity of all components.

**Important** To enhance the security of your database solution, especially on the internet, consider using a firewall on the public side of a FileMaker Server deployment. Also consider using SSL for the web server. For more information on setting up security for web published solutions, see www.filemaker.com/support/security.
One-machine deployment

You can deploy FileMaker Server on one machine in two ways: Database Server only or Database Server and Web Publishing Engine. For information on installing FileMaker Server in a one-machine configuration, see chapter 1, “Installation quick start.”

Database Server only

You can install FileMaker Server on one machine with web publishing disabled. With this type of deployment, you can serve FileMaker Pro clients and, if you have a FileMaker Server Advanced license, serve ODBC/JDBC clients.

Benefits: This is the easiest deployment to set up and administer, if you don't need web publishing.
Database Server and Web Publishing Engine

You can install FileMaker Server, the Web Publishing Engine, and all of the associated software components on the same machine as your web server.

**Benefits:** This is the simplest deployment and the one that most FileMaker Server users will use. This configuration is suitable for small deployments (up to 50 FileMaker Pro clients) and limited web publishing.

Ports 80, 5003, 16000, 16001, 16016, and 16018 must be open.
Ports 16004, 16006, 16008, 16010, 16012, 16014, 50003, and 50006 must be available.
Two-machine deployments

You can deploy FileMaker Server across two machines in two ways.

Two-machine


Benefits: This deployment separates all of the web publishing-related components from the Database Server. Under most conditions, this configuration is the highest performing FileMaker Server deployment.
Two-machine alternative

You deploy the web server and Web Server Module on one worker machine, and you deploy the Web Publishing Engine and the Database Server on a second (master) machine. In this deployment, you can optionally locate the web server (worker) machine outside of a firewall, and the Web Publishing Engine and the Database Server (master) machine can be located inside the firewall.

Benefits: This deployment might be better if someone else limits what you can install on the web server or if your web server is heavily loaded with non-FileMaker content. However, because the Database Server and Web Publishing Engine are on the same machine, this deployment faces the same scalability constraints as the single-machine deployment.
Three-machine deployment

You deploy the web server and Web Server Module on one worker machine, deploy the Web Publishing Engine on a second worker machine, and deploy the Database Server on a third (master machine). The web server and Web Server Module are on a machine that serves as the request gateway, and you can optionally use a firewall to separate them from the components on the other two machines.

Benefits: In general, this deployment performs slightly slower than the two-machine deployment for web publishing because of the overhead to communicate with the separate web server machine. However, the overhead is generally minimal and constant. In a very high-load environment, this deployment outperforms the two-machine deployment because the web server is offloaded.
Chapter 2 | Deploying FileMaker Server across multiple machines

Installing on multiple machines

For a multiple-machine deployment, you install FileMaker Server software on each machine. After the software is installed on all of the machines, you use the Deployment assistant on the master machine to configure your settings and specify which machines run which components. To install on only one machine, see chapter 1, “Installation quick start.”

Important Install the FileMaker Server software on the worker machines first and then on the master machine.

Before you begin

Do the following before installing FileMaker Server on multiple machines:

- To move an existing installation of FileMaker Server to FileMaker Server 9, see chapter 5, “Upgrading or moving an existing installation.”
- Locate your license key. See “About the license key” on page 12.
- To enable web publishing, ensure that the web server is enabled and set up on the worker machine that has the web server. See chapter 6, “Setting up the web server.”
When running FileMaker Server in an environment that uses a firewall, be sure to configure the firewall on each machine to allow FileMaker Server to use them. Restart each machine after configuring the firewall.

<table>
<thead>
<tr>
<th>Port number</th>
<th>Used by</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>80</td>
<td>Web server machine, end users</td>
<td>HTTP</td>
</tr>
<tr>
<td>5003</td>
<td>Master machine, end users</td>
<td>FileMaker Pro and FileMaker Server for hosting files</td>
</tr>
<tr>
<td>16000</td>
<td>All machines, Admin Console users</td>
<td>HTTP: Admin Console Start Page, Admin Helpers</td>
</tr>
<tr>
<td>16001</td>
<td>Master machine, Admin Console users</td>
<td>HTTPS: Admin Console communications</td>
</tr>
<tr>
<td>16004</td>
<td>All machines</td>
<td>Admin Console</td>
</tr>
<tr>
<td>16006</td>
<td>Web Publishing Engine machine</td>
<td>FileMaker Internal</td>
</tr>
<tr>
<td>16008</td>
<td>Web Publishing Engine machine</td>
<td>FileMaker Internal</td>
</tr>
<tr>
<td>16010</td>
<td>Web Publishing Engine machine</td>
<td>Custom Web Publishing Engine</td>
</tr>
<tr>
<td>16012</td>
<td>Web Publishing Engine machine</td>
<td>FileMaker Internal</td>
</tr>
<tr>
<td>16014</td>
<td>Web Publishing Engine machine</td>
<td>FileMaker Internal</td>
</tr>
<tr>
<td>16016</td>
<td>Web Publishing Engine machine</td>
<td>Apache Jakarta Protocol (AJP) 1.3</td>
</tr>
<tr>
<td>16018</td>
<td>Web Publishing Engine machine</td>
<td>Apache Jakarta Protocol (AJP) 1.3</td>
</tr>
<tr>
<td>50003</td>
<td>Master machine (local only)</td>
<td>FileMaker Server service (Windows) or daemon (Mac OS)</td>
</tr>
<tr>
<td>50006</td>
<td>Master machine (local only)</td>
<td>FileMaker Server Helper service (Windows) or daemon (Mac OS)</td>
</tr>
</tbody>
</table>

**Note** If you are already running FileMaker Pro on the same machine, you must quit FileMaker Pro before installing FileMaker Server.
Installing on the worker machines

Install FileMaker Server on the worker machines first, then on the master machine. Worker machines run the web server, the Web Publishing Engine, or both. You can change the machine role of each worker later.

**Note** If you set up a machine as a worker and want to change it to a master, uninstall and then reinstall FileMaker Server. Choose *Master* in the installer’s Master/Worker Designation dialog box. For more information, see chapter 5, “Upgrading or moving an existing installation.”

1. Insert the CD into the drive or follow your electronic download instructions.
2. Double-click the installation icon.
3. Windows: Select a language, then click OK.
4. Review and accept the end user license agreement.
5. Select Multiple Machines and click Next.

6. Select Worker and click Next.

FileMaker Server begins to install. This process may take several minutes.
7. After the software has been successfully installed, click Finish (Windows) or OK (Mac OS) to complete the installation of a worker machine. Next, install FileMaker Server 9 on another worker machine or on the master machine.

Installing on the master machine
Install FileMaker Server on the worker machines first, then on the master machine. The master machine always hosts the Database Server, and may additionally host the Web Publishing Engine.

1. Insert the CD into the drive or follow your electronic download instructions.
2. Double-click the installation icon.
3. Windows: Select a language, then click Next.
4. Review and accept the end user license agreement.
5. Select Multiple Machines and click Next.

6. Select Master and click Next.

7. Enter your license key information and click Install.

FileMaker Server begins to install. This process may take several minutes.
8. If you don't have Java Runtime Environment version 5 at a minimum, you are prompted to install it.

- **Windows:** You can allow the FileMaker Server installer to install Java Runtime Environment version 6.
- **Mac OS:** Java is part of the standard Mac OS installation. If you don't have Java installed, use Software Update to download it and then re-run the installer.
After the software has been successfully installed, start the Deployment assistant.

- **Windows:** In the last step of the installer, enable Start the Deployment assistant, then click Finish.
- **Mac OS:** Click Continue when prompted to start the Deployment assistant.

If you have the Open “safe” files after downloading setting disabled in Safari, locate admin_console_webstart.jnlp in your download folder. Double-click this file to start the Deployment assistant.

If you want, you can stop now and start the Deployment assistant later. To deploy FileMaker Server at a later time:

- **Windows:** Click Start menu > Programs > FileMaker Server > FMS 9 Start Page.
- **Mac OS:** Double-click the FMS 9 Start Page shortcut on the desktop.
10. A FileMaker Server Start Page opens in the web browser. It may take a few minutes for the Admin Console to start and the Deployment assistant to appear.

11. Click Run (Windows) or Trust (Mac OS) to respond to the security message.
12. In the first step of the Deployment assistant, assign the user name and password you want to use whenever you log into Admin Console. Click Next.

   **Note** User Name is not case-sensitive. Password is case-sensitive.

13. Specify a name, description, and contact information for this deployment of FileMaker Server, then click Next. This information will appear on the FileMaker Server Admin Console Start Page. The Server Name is displayed to FileMaker Pro users in the Open Remote dialog box.
14. If you purchased a FileMaker Server Advanced license, you can enable a hosted FileMaker Pro file to be a data source via ODBC and JDBC. Click Yes, enable ODBC/JDBC or No, do not enable ODBC/JDBC. Click Next.

*Important* This feature allows clients to use FileMaker files as data sources using ODBC and JDBC. This feature is not needed to host FileMaker Pro databases that access ODBC data sources. For more information, see FileMaker Pro Help.

15. If you want to publish FileMaker data on the internet or intranet, click Yes, enable Web Publishing. Otherwise, click No, do not enable Web Publishing. Then click Next. Continue with step 20 if you are not enabling web publishing.

*Note* To use web publishing, the web server must be installed and running. See chapter 6, “Setting up the web server.”
16. Select the web publishing technologies you want to use and click Next.

- You can install the FileMaker Server supported version of the PHP engine (PHP 5.2.x), or you can use your own PHP engine. If you already have a PHP engine installed and choose to use the FileMaker Server supported PHP engine, your currently installed PHP engine will be disabled.

- If you use your own PHP engine, you must manually install the FileMaker API for PHP to use PHP publishing. See *FileMaker Server Custom Web Publishing with PHP* for more information.

**Note** Instant Web Publishing requires a FileMaker Server Advanced license.
17. Select a deployment type. Click Next. For more information, see “Deployment alternatives” on page 30.
18. Assign a worker machine to each role (Web Publishing Engine or web server). Click Next.

- The Deployment assistant detects all unassigned worker machines on the local network and shows their IP addresses in the Machines list beside each role. If a worker is not listed, click Rescan. Then check to see whether the worker is listed.

- If a worker's IP address is still not listed, enter the address in IP Address and click Lookup. The IP address you entered is added to the Machines list if the machine can be contacted and is an available worker.

**Note** You will not be able to see the worker machines if the required ports of the firewall are not open. (See “Before you begin” on page 37.) See “Deployment assistant reports that the web server test failed” on page 60 if an error screen displays.
19. Select a web server and click Next. The available choices of web servers are those supported by the worker machines.

- If the Deployment assistant fails to detect the web server, see chapter 6, “Setting up the web server.” Also be sure that the necessary firewall ports are open. See “Before you begin” on page 37.

- If you see Web Server Test Failed, the Deployment assistant cannot communicate with the web server. For more information, see “Troubleshooting” on page 60.

- To select a web server later, click Skip this step and select a web server later.
20. A deployment summary appears. Click Finish or click Back to change any of your choices.
21. FileMaker Server is being deployed. This may take a few minutes.

22. FileMaker Server Admin Console starts. Click OK in the Welcome dialog box.

   If you don't see the Welcome dialog box, open a web browser and enter http://localhost:16000.

   **Note** You can register FileMaker Server and verify the FileMaker Server deployment now or later. See “Next steps” on page 55.
23. In the FileMaker Server Overview pane, note the IP address of the master machine, which runs the Database Server.

Tip Write down the IP address so that you can start the Admin Console from another computer.

Windows: When Admin Console starts and the firewall is on, an alert displays. Click Unblock to start Admin Console.
Next steps

Now that you have deployed FileMaker Server, get started using your new software.

2. Test your installation: FileMaker Server provides a sample database and a one-click method to verify that your installation is working. See chapter 3, “Testing your deployment.”
3. Register your software: Register your copy of FileMaker Server. See “Registration and customer support” on page 91.
4. Administer FileMaker Server: For information on how to upload databases, schedule backups, and other regular tasks, see chapter 4, “Administration overview.”
Chapter 3

Testing your deployment

This chapter describes how to test that FileMaker Server and web publishing technologies are working.

Using the FileMaker Server Technology Tests page

The easiest way to test your FileMaker Server deployment is to use the FileMaker Server Technology Tests page. There are two ways to view the Test page:

- Start Admin Console. Choose Server menu > Open Test Page or click the Open Test Page icon in the toolbar.

- Type the following in a web browser:
  
  http://[host]:16000/test

  where [host] is the IP address or host name of the master machine.

  **Note** You can use the Technology Tests page without logging into Admin Console.
The tests on the FileMaker Server Technology Tests page access the sample database (FMServer_Sample.fp7) using FileMaker Pro or one of the web publishing technologies. The following table describes the tests available on this page.

<table>
<thead>
<tr>
<th>To test</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FileMaker Pro</strong></td>
<td>Click Test FileMaker Pro.</td>
</tr>
<tr>
<td></td>
<td>If FileMaker Pro starts and opens the sample database hosted on FileMaker Server, then the Database Server is working and responding to requests from FileMaker Pro clients.</td>
</tr>
<tr>
<td></td>
<td>You must have FileMaker Pro or FileMaker Pro Advanced installed locally on the machine where you are conducting the test.</td>
</tr>
<tr>
<td></td>
<td>To perform the same test another way, start FileMaker Pro on another machine, choose File menu &gt; Open Remote, select the server you want to test, and select FMServer_Sample.</td>
</tr>
<tr>
<td><strong>Instant Web Publishing</strong></td>
<td>Click Test Instant Web Publishing.</td>
</tr>
<tr>
<td></td>
<td>If another web browser window or tab opens and displays the sample database, then Instant Web Publishing is working. If successful, this test shows that the Database Server, Web Publishing Engine, and web server are working. A FileMaker Server Advanced license is required for Instant Web Publishing.</td>
</tr>
<tr>
<td><strong>Custom Web Publishing with XSLT</strong></td>
<td>Click Test XSLT Custom Web Publishing.</td>
</tr>
<tr>
<td></td>
<td>If another web browser window or tab opens and displays a table containing data from the sample database, then Custom Web Publishing with XSLT is working. If successful, this test shows that the Database Server, Web Publishing Engine, and web server are working.</td>
</tr>
<tr>
<td><strong>Custom Web Publishing with PHP</strong></td>
<td>Click Test PHP Custom Web Publishing.</td>
</tr>
<tr>
<td></td>
<td>If another web browser window or tab opens and displays a table containing data from the sample database, then Custom Web Publishing with PHP is working. If successful, this test shows that the Database Server, Web Publishing Engine, web server, PHP engine, and FileMaker API for PHP are working.</td>
</tr>
</tbody>
</table>
Successful test pages

FileMaker Pro

Instant Web Publishing

XSLT Custom Web Publishing

PHP Custom Web Publishing
Troubleshooting

Deployment assistant reports that the web server test failed

If the Deployment assistant cannot communicate with the web server that you specified, you can provide more information and try again.

To change web server settings:

1. In the Web Server Test Failed step in the Deployment assistant, specify the Protocol, Host address, and Port for the web server and click Retry.

You may encounter this during initial deployment or when you click Edit Server Deployment in the Admin Console (FileMaker Server Overview pane).
2. Examine the Web Server Test Results:
   - If successful, the result is **Web Server Test Passed**.
   - If unsuccessful, the Deployment assistant could not communicate with the web server. This test can fail if your web server requires HTTPS or uses a port other than 80. You can re-enter this information and try to communicate with the web server again.

   Ensure that you can access the web server from the master machine and try these steps again.
   If still unsuccessful, then click **Skip this step and configure later**.

**Admin Console doesn’t start after deployment on master machine**

The most common solutions are:
   - On the Admin Console Start Page, click **Click here to start Admin Console**.
   - Open a web browser on the master machine and enter `http://localhost:16000`.

**Admin Console Start Page says to install Java when it’s already installed**

Internet Explorer may be configured to prevent add-ons from running. Click the Information Bar at the top of the browser window and allow Internet Explorer to run the Java Web Start ActiveX Control add-on. Java Web Start technology uses this add-on to detect whether the required version of Java is installed. After you allow this add-on to run, click **Start Admin Console**.
Cannot start Admin Console from a remote machine

- If the master machine has a firewall enabled, then you must open the ports required by FileMaker Server to communicate with users and administrators. See “Before you begin” on page 37.
- If you double-click an Admin Console shortcut and Admin Console doesn’t open, check whether the IP address of the master machine has changed. Each shortcut starts Admin Console for a specific FileMaker Server deployment. If the IP address of the master machine has changed, you must remove the shortcut and start Admin Console again. See “Starting Admin Console” on page 67.

Clients cannot see databases hosted by FileMaker Server

The firewall settings on the master machine may be blocking the display of databases to clients. See “Before you begin” on page 15 and “Before you begin” on page 37 for more information on which ports need to be unblocked in firewalls.

The Mac OS web server fails during startup

When you install the FileMaker Server supported PHP engine, it does not appear in the Mac OS X Server Admin tool; it is not supposed to be listed. If you use the Mac OS X Server Admin tool to turn on PHP, the Server Admin tool adds a second PHP engine to the web server’s configuration files. As a result, the web server may fail during startup when it attempts to load the second PHP engine. Refer to the Knowledge Base for more information.
Chapter 4

Administration overview

This chapter explains the basics of how to:

- start FileMaker Server Admin Console
- upload a FileMaker Pro database
- back up databases hosted by FileMaker Server
- host databases connected to ODBC data sources
- run a server-side ScriptMaker™ script
- send messages to FileMaker Pro clients
- send email notifications to clients

For detailed information about using Admin Console to administer FileMaker Pro databases and clients that are connected to hosted databases, see FileMaker Server Help.
About FileMaker Server Admin Console

FileMaker Server Admin Console is an application that lets you configure and administer FileMaker Server, work with and monitor hosted databases and clients, and track statistical information.

To administer FileMaker Server, you can run Admin Console on the computer where FileMaker Server is running or on a different Windows or Mac OS networked computer.
You administer FileMaker Server by choosing options on the menus, toolbar, or Navigation pane. The results are shown in the Details pane, where you can select tasks, specify configuration options, or monitor activity. Tasks that can be performed from the toolbar include:

1. Start Database Server
2. Stop Database Server
4. Stop Web Publishing Engine
5. Start Upload Database assistant
6. Open FileMaker Server Start Page in a web browser
7. Open FileMaker Server Test page to test access to a sample database hosted by FileMaker Server
Using Admin Console to administer FileMaker Server

When administering FileMaker Server, you can:

- Configure FileMaker Server application properties.
- Open — or host — a FileMaker Pro database file, making it available to clients on the network.
- View information about the files being hosted, like the number of clients accessing each database.
- Send messages to connected clients.
- Close a hosted FileMaker Pro database, making it unavailable to clients.
- Disconnect a selected client from all hosted databases.
- Pause or resume hosted databases.
- Create scheduled tasks to back up hosted databases.
- Start or stop the Database Server.
- Start or stop the Web Publishing Engine.
- Configure settings for Instant Web Publishing.
- Configure Custom Web Publishing settings for XML, XSLT, or PHP.
Starting Admin Console

You can start Admin Console on a Windows or Mac OS computer that has network access to the master machine running FileMaker Server. FileMaker Server delivers Admin Console as a lightweight Java client to your remote computer via Java Web Start technology.

**Note** Your remote computer must have Java Runtime Environment version 5 at a minimum before starting Admin Console.

To start Admin Console:

1. Open a web browser and enter
   
   http://[host]:16000
   
   where [host] is the IP address or host name of the machine running FileMaker Server as a master. This is the address you noted when you installed FileMaker Server. The Admin Console Start Page appears.

   **Tip** Bookmark the Start Page in your web browser. Come back to this page to access documentation and to use the web publishing tools.
2. Click Start Admin Console.

   **Note** If nothing happens, your browser might have downloaded the Java Web Start file but might not have started it. Check your web browser configuration to enable Java or automatically open downloaded files. You can also look for `admin_console_webstart.jnlp` where your browser saves downloaded files. Double-click this file to start Admin Console.

3. Before Admin Console starts, you must respond to a security message. The security message is a signed certificate that ensures the authenticity of the product and it must be accepted to start Admin Console. To suppress this message in the future and continue:
   - **Windows**: enable Always trust content from this publisher, then click Run.
   - **Mac OS**: click Show Certificate and open Trust Settings. For When using this certificate, choose Always Trust, then click Trust.
4. In the create shortcuts dialog box, click *Yes* to create a shortcut that you can use to start Admin Console again later.

   - **Windows:** A shortcut is created on the desktop and in the *Start* menu under *FileMaker Server*. Depending on the version of Java installed, the shortcuts may be created without prompting you.
   - **Mac OS:** After you click *Yes*, specify a name and location in the *Save* dialog box where to save the shortcut, and then click *Save*.

   The shortcut is helpful to manage several deployments of FileMaker Server from the same machine. The shortcut name starts with "FMS9-" and is followed by the FileMaker Server name that you specified in the Deployment assistant.

5. In the Login dialog box, enter the User Name and Password that you chose in the Deployment assistant when you initially deployed FileMaker Server.

   Admin Console starts and displays the FileMaker Server Overview pane.

   **Tip** The best method for remote administration outside the administrator’s physical network is to keep a firewall in place and use a secure mechanism to connect to your network, such as a virtual private network (VPN). Use Admin Console to administer FileMaker Server on a remote computer once you are securely connected to your network.
Uploading a database

Use the FileMaker Server Upload Database assistant to transfer FileMaker Pro database files from your computer’s file system to FileMaker Server. You can copy database files from a Windows or Mac OS computer that is on the same network as the FileMaker Server computer.

The Upload Database assistant copies the specified database files to a FileMaker Server folder and sets file permissions and privileges so that you can access the databases after they are uploaded.

To start the Upload Database assistant, choose the Admin Console Server menu > Upload Database.

Note  If any of your databases require a plug-in, see FileMaker Server Help for information about managing plug-ins.

Backing up databases

Use the FileMaker Server Schedule assistant to create a scheduled task to:

- back up all hosted databases
- back up hosted databases that are in a specified folder
- back up a specified database

To create a scheduled task for backing up databases, choose the Admin Console Schedules pane, select Create a Schedule from the Actions menu, and click Perform Action. Then, choose Back Up Databases, and specify whether you want to back up hourly, daily, weekly, or on a custom schedule.

Database backups are saved in the default backup folder or in a folder that you specify. You can specify the default backup folder on the Admin Console Database Server > Default Folders tab.
When FileMaker Server backs up a database, it copies the database while it is active. Users can continue to make modifications. When the copy is complete, the database is paused to synchronize backup files with the current database and then the database is resumed. You can set options to verify the backup and send email notifications to clients.

**Hosting databases connected to ODBC data sources**

FileMaker Server can host FileMaker Pro databases that are connected to external SQL data sources. In FileMaker Pro, you can work with the ODBC data in much the same way that you work with data in a FileMaker file. For example, you can add, change, delete, and search external data interactively.

To host databases connected to ODBC data sources after the ODBC data source has been defined in FileMaker Pro, on the master machine create the DSNs (Data Source Names) required by each database. To create the DSN, choose Control Panel > Administrative Tools > Data Sources (ODBC) (Windows) or ODBC Administrator (Mac OS).

See FileMaker Server Help for more information on using ODBC and JDBC with FileMaker Server and accessing external ODBC data sources.

**Note** You do not need to enable the OBDC/JDBC data source feature of FileMaker Server Advanced to host FileMaker Pro databases that access an external SQL data source via ODBC.
Running a server-side script

You can create scheduled tasks to run two types of scripts:

- FileMaker ScriptMaker scripts in databases hosted by FileMaker Server
- system-level scripts — for example, Windows batch, Perl, VBScript, and AppleScript

To create a scheduled task for scripts, choose the Admin Console Schedules pane, select Create a Schedule from the Actions menu, and click Perform Action. Then, choose Run Script. The Schedule assistant starts and guides you through the rest of the process.

ScriptMaker scripts

To schedule a ScriptMaker script to run, start the Schedule assistant as described above, then choose Run Script. Next, select the ScriptMaker Script type, then select the database that contains the script you want to run.

ScriptMaker scripts can do simple tasks or complex tasks. For example, you can write a ScriptMaker script to remove duplicate records or to validate the format of phone numbers. You can schedule these scripts to run during off hours, perhaps before a daily backup.

Scripts can incorporate conditional decisions (if-else statements) and perform repetitive tasks (loop statements). You use the ScriptMaker feature in FileMaker Pro to build scripts by selecting from a list of web-compatible FileMaker Pro commands, called script steps, and specifying options (if necessary). To find out if a ScriptMaker script step is web-compatible, see the script step reference in FileMaker Pro Help.
System-level scripts

Script files must be placed in the Scripts folder on the master machine in your FileMaker Server deployment. To schedule a system-level script to run, start the Schedule assistant as described above, then choose Run Script. Next, select the System-Level Script type, then select the script file you want to run.

System-level scripts can perform whatever tasks you need to perform at the operating system level on the master machine. For more information, see the documentation for the scripting language you want to use.

See FileMaker Server Help for more information about running scripts as scheduled tasks.

Sending messages to FileMaker Pro clients

You can send messages to notify FileMaker Pro clients about important events such as server shutdows, database maintenance, or deadline reminders. You can send messages to:

- all FileMaker Pro clients or selected FileMaker Pro clients connected to hosted databases
- FileMaker Pro clients connected to any database or selected databases hosted by FileMaker Server
- FileMaker Pro clients as a scheduled task

To send messages to FileMaker Pro clients, choose the Admin Console Clients pane and select one or more clients from the list. Select Send Message or Send Message to All Clients from the Actions menu, and click Perform Action to enter the message.
To send messages to FileMaker Pro clients connected to hosted databases, choose the Admin Console Databases pane and select a folder or database file. Select Send Message or Send Message to all from the Actions menu, and click Perform Action to enter the message.

To create a scheduled task for sending messages, choose the Admin Console Schedules pane, select Create a Schedule from the Actions menu, and click Perform Action. Then, select Send Message, create the message, and set up a schedule to deliver it.

**Emailing notifications**

You can configure FileMaker Server to send SMTP email notifications about errors and warnings as well as completion of scheduled tasks. Emails allow for more timely notification of these events, without having to locate the information in system or event logs on the computer running FileMaker Server.

You can send emails:

- when FileMaker Server errors and warnings (optional) occur
- when a scheduled task is finished
- when a web user action occurs

Specify your SMTP mail server settings in FileMaker Server, including the SMTP server address, the port number, user name and password, and the list of email addresses that will receive the email messages.
Each email notification type is configured separately in FileMaker Server, allowing for different recipients for each type of email:

- Configure FileMaker Server to send error or warning emails on the Admin Console General Settings > Email Notifications tab. You can also specify a list of email addresses that will receive error or warning emails on this tab.

- Enable email notifications when you create a scheduled task with the Schedule assistant. The scheduled task will send email notifications to the email addresses specified in the Schedule assistant. The SMTP server used for email notifications is configured on the General Settings > Email Notifications tab.

- If you create a solution using Custom Web Publishing with XSLT, you can use one of the fmxslt:send_email() extension functions in an XSLT stylesheet to send email messages. You configure the SMTP server on the Admin Console Web Publishing > XSLT tab.

For more information about email notifications, see FileMaker Server Help.
FileMaker Server Getting Started Guide
Chapter 5
Upgrading or moving an existing installation

You can upgrade an existing installation of FileMaker Server 7 or 8 to FileMaker Server 9. You can also move an existing installation of FileMaker Server 9 to other machines.

If you are upgrading from a previous version of FileMaker Server 9, you must have the license key of the previous version. The installer prompts you to enter the new upgrade license key and the previous license key. To upgrade the license of an existing deployment of FileMaker Server 9 to FileMaker Server 9 Advanced, see “Updating the FileMaker Server 9 license” on page 13.

The steps listed below outline the process. See the remaining sections for information about each step.

**Important**  You must perform the steps in the order they are presented.

2. Make a copy of any database files, shell script files, and plug-ins you used with FileMaker Server.
3. Note your existing FileMaker Server settings.
6. Move any database files, script files, and plug-ins you used with FileMaker Server to the proper folders within the FileMaker Server 9 folder structure.
7. Recreate schedules and configure FileMaker Server.
Step 1. Stop FileMaker Server

Stopping FileMaker Server 7 or 8
For instructions on how to stop FileMaker Server or FileMaker Server Advanced 7 or 8, see the FileMaker Knowledge Base.

Stopping FileMaker Server 9
2. Choose Server menu > Stop Web Publishing. 
   Wait while the Web Publishing Engine is stopped.
   Wait while the Database Server is stopped.
4. Stop the FileMaker Server service (Windows) or daemons (Mac OS). For more information, see FileMaker Server Help.

Step 2. Make a copy of databases, scripts, and plug-ins
Make a copy of any database files, shell script files, and plug-ins you used with FileMaker Server. In a default FileMaker Server installation, they are stored on the master machine in the following folders.
Chapter 5 | Upgrading or moving an existing installation

**FileMaker Server 7 files**
Windows: \Program Files\FileMaker\FileMaker Server 7\Data\Databases
Mac OS: /Library/FileMaker Server 7/Data/Databases/

Windows: \Program Files\FileMaker\FileMaker Server 7\Data\Scripts\nMac OS: /Library/FileMaker Server 7/Data/Scripts/

Windows: \Program Files\FileMaker\FileMaker Server 7\Extensions\Plugins\nMac OS: /Library/FileMaker Server 7/Extensions/Plugins/

**FileMaker Server 8 and 9 files**
Windows: \Program Files\FileMaker\FileMaker Server\Data\Databases
Mac OS: /Library/FileMaker Server/Data/Databases/

Windows: \Program Files\FileMaker\FileMaker Server\Data\Scripts\nMac OS: /Library/FileMaker Server/Data/Scripts/

**FileMaker Server 8 files**
Windows: \Program Files\FileMaker\FileMaker Server\Extensions\Plugins\nMac OS: /Library/FileMaker Server/Extensions/Plugins/

**FileMaker Server 9 files**
Windows: \Program Files\FileMaker\FileMaker Server\Extensions\nMac OS: /Library/FileMaker Server/Extensions/
Step 3. Note your FileMaker Server settings

Make a note of your existing FileMaker Server settings because you will have to re-enter your settings manually later. Some examples of settings you might want to note are:

- the name of your FileMaker Server installation (the name users see in the Open Remote dialog box in FileMaker Pro)
- schedules for backing up databases, running scripts, and sending messages
- other settings that you have changed from the defaults and want to reuse in your FileMaker Server 9 deployment

Where to note settings for FileMaker Server 7 or 8

Start FileMaker Server Admin and note the settings described above. For details on using FileMaker Server Admin, see the version 7 or 8 FileMaker Server Administrator’s Guide.

To use settings from FileMaker Server Advanced versions 7 or 8, start the Web Publishing Engine Administration Console and note any web publishing settings you want to save. For details on using the Web Publishing Engine, see the version 7 or 8 FileMaker Server Advanced Web Publishing Installation Guide.

Where to note settings for FileMaker Server 9

Before moving an existing installation of FileMaker Server 9 to another machine, start FileMaker Server Admin Console (see “Starting Admin Console” on page 67). View the panes under Configuration and note the settings described above.
Step 4. Uninstall FileMaker Server

After you have noted the settings in your existing installation of FileMaker Server, you can uninstall FileMaker Server.

Important  The uninstall process deletes your settings, so be sure to write down any settings that you want to save. See “Step 3. Note your FileMaker Server settings.”

Uninstalling FileMaker Server 7 or 8

For instructions on how to uninstall FileMaker Server or FileMaker Server Advanced versions 7 or 8, see the FileMaker Knowledge Base located at www.filemaker.com/kb.

Uninstalling FileMaker Server 9

To uninstall a multiple-machine deployment, uninstall the worker machines first.

Windows

To uninstall FileMaker Server:

1. Start Windows.
2. Click the Start button, then choose Control Panel > Add or Remove Programs.
3. Select FileMaker Server 9 from the list, and click Remove.
   Your database files, script files, and plug-ins are not deleted.
Mac OS

To uninstall FileMaker Server:

1. Insert the CD into the drive or follow your electronic download instructions.
2. Double-click the FileMaker Server 9 installation icon.
3. Enter your Mac OS user name and password and follow the on-screen instructions.
4. For Installation Type, choose Uninstall and click Next.
   Confirm that you want to uninstall FileMaker Server 9. Some files and folders cannot be removed.
5. Click OK.

Step 5. Install FileMaker Server 9

To install FileMaker Server, you must use an account with administrative privileges. To deploy on a single machine, see chapter 1, “Installation quick start.” To deploy across multiple machines, see chapter 2, “Deploying FileMaker Server across multiple machines.”

Note If you enter an upgrade license key in the Personalization dialog box, the Upgrade dialog box prompts you for a valid license key from the previous version of the product.

The FileMaker Server installer and the Deployment assistant prompts you for some of the settings that you noted in “Step 2. Make a copy of databases, scripts, and plug-ins” on page 78.
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**Step 6. Move files to the proper location**
Move the script files and plug-ins you used with FileMaker Server 8 to the proper folders within the FileMaker Server 9 folder structure. See “Step 2. Make a copy of databases, scripts, and plug-ins” on page 78.

**Note** You can use the Upload Database assistant to transfer your existing databases to your new FileMaker Server deployment. See “Uploading a database” on page 70. To transfer your database files manually, see FileMaker Server Help.

**Step 7. Recreate schedules and configure**
You can now start the Admin Console and configure your FileMaker Server deployment using some of the settings you noted in “Step 2. Make a copy of databases, scripts, and plug-ins” on page 78. For more information on configuring your deployment, see FileMaker Server Help.

For information on how to upload databases, schedule backups, and perform other regular tasks, see chapter 4, “Administration overview.”
FileMaker Server Getting Started Guide
Chapter 6

Setting up the web server

To use web publishing, you must install and configure Internet Information Services (IIS) in Windows or enable Apache in Mac OS. For information on how to install and configure your web server, see the documentation that is included with your operating system.

This chapter describes additional web server settings required by FileMaker Server.

Windows IIS settings

Before installing FileMaker Server, ensure that the web server is properly configured. To access IIS online documentation, enter http://localhost/iisHelp in a web browser on your web server host machine.

After you have ensured that the web server is running, use the following settings with FileMaker Server.

Setting up authentication for a Windows IIS website

FileMaker Server handles the authentication for password-protected databases that are published via Custom Web Publishing with XML or XSLT. You can choose whether you want to use IIS website authentication in addition to FileMaker Server authentication.
You can choose from the following configurations:

- **Disable IIS authentication.** You can disable all IIS authentication methods and use anonymous access to the IIS site. This is the simplest configuration. See the next section, “Disabling IIS authentication.”

- **Leave IIS authentication enabled and also enable Basic Authentication.** You can leave the current IIS authentication methods enabled for use with other websites, and use Basic Authentication for the Web Publishing Engine. You must also set up Windows user accounts that exactly match the user accounts for the web-published FileMaker databases. See “Enabling IIS authentication” on page 87.

**Disabling IIS authentication**

By default, Windows IIS directory security attempts to authenticate all requests that are made through the IIS web server. The simplest way to use IIS with FileMaker Server is to disable IIS authentication. If you disable all IIS authentication methods and use anonymous access to the IIS site, then you don’t need to add any Windows user accounts.

To disable IIS authentication:

1. From the Control Panel, choose Administrative Tools > Internet Information Services (IIS) Manager to open the Internet Information Services Manager.

2. In Internet Information Services, select the website and choose Action menu > Properties. You may have to expand some of the nodes to see the websites.

3. In the Directory Security properties pane, click Edit for authentication methods. (The button name varies slightly among Windows versions.)
4. In the Authentication Methods dialog box, do the following:
   - Ensure that Anonymous Access is enabled.
   - For Authenticated access, disable all of the authentication methods.
5. Click OK.

**Enabling IIS authentication**

If you enable any of the IIS authentication methods for the IIS web server, you must enable Basic Authentication for websites that connect to the Web Publishing Engine. The Web Publishing Engine uses only Basic Authentication. Other websites on the web server can use the other IIS authentication methods.

In this configuration, you must also create Windows user accounts on the web server host machine that contain user names and passwords. These user names and passwords must exactly match the user names and passwords for all password-protected accounts defined in all FileMaker databases that are published via Custom Web Publishing with XML or XSLT.

To enable IIS authentication:

1. From the Control Panel, choose Administrative Tools > Internet Information Services (IIS) Manager to open the Internet Information Services Manager.
2. In Internet Information Services, select the website and choose Action menu > Properties. You may have to expand some of the nodes to see the websites.
4. In the Authentications Methods dialog box, do the following:
   - Enable Anonymous access.
   - Enable Basic Authentication along with any of the other authentication methods under Authenticated access.
5. Click OK.

**Mac OS X settings**

Before installing FileMaker Server, ensure that the web server is enabled and properly configured. To access Apache online documentation, enter `http://localhost/manual` in a web browser on your web server host machine.

If the web server in your FileMaker Server deployment is running Mac OS X Server, then disable the Performance Cache option for the Apache web server. The performance cache may interfere with FileMaker Server and data may not refresh correctly.

To disable the performance cache on Mac OS X Server:
1. In the Mac OS X Server Admin, click Web in the list for the desired server.
2. Click Settings in the toolbar.
3. In the Sites pane, double-click the site in the list.
4. In the Options pane, clear the Performance Cache option.
Chapter 7
Additional resources

Product documentation

Using FileMaker Server documentation

The following manuals are included:

- *FileMaker Server Getting Started Guide* (this manual): describes how to deploy FileMaker Server 9 and how to move from FileMaker Server 7 or 8
- *FileMaker Server Custom Web Publishing with XML and XSLT*: describes how to develop Custom Web Publishing solutions using XML or XSLT on FileMaker Server
- *FileMaker Server 9 Guide to Updating Plug-ins*: describes how FileMaker Server Auto Update can download the most current plug-in to FileMaker Pro database client computers

The following manuals describe features available only in FileMaker Server Advanced:

- *FileMaker Instant Web Publishing Guide*: describes how to make FileMaker Pro databases accessible to web browser users over an intranet or the Internet
- *FileMaker ODBC and JDBC Guide*: describes concepts and details to help you share FileMaker data with other applications using ODBC and JDBC

Online Help is accessible from FileMaker Server Admin Console, Help menu > FileMaker Server Help.
Where to find PDF documentation

To access PDFs of FileMaker Server documentation:

- In the Admin Console, choose Help menu > FileMaker Server Product Documentation.
- Click the links in the FileMaker Server Admin Console Start Page.
- On the web, go to www.filemaker.com/downloads.

To view the PDF files, you need a PDF reader. In Mac OS X, you can use either the built-in Preview application or Adobe Reader®. Windows users need Adobe Reader. If you do not have Adobe Reader, you can download it from the Adobe website at www.adobe.com.

All of the PDF files use the tagged Adobe Portable Document Format (PDF). Tagged PDF files work with assistive technology such as the screen readers JAWS and Window-Eyes for Windows. For more information about tagged PDF files, see the Adobe website at www.adobe.com.
Registration and customer support

Please take the time to register your product during installation. By registering your software, you may be eligible for upgrade offers and other customer services. Follow the prompts to provide your registration, product, and additional information.

To use the FileMaker Server trial version, you must register your software prior to use.

You can register by choosing Help menu > Register Now in FileMaker Server Admin Console. You must register with a valid license key.

For information about Technical Support and Customer Assistance, visit www.filemaker.com/intl.

To access resources on the FileMaker website such as ready-made solutions and the FileMaker Knowledge Base, open the FileMaker Server Admin Console Start Page and click FileMaker Tech Support.

If you do not have access to the web, please refer to the FileMaker Service Directory that comes with your software.

Check for software updates

From the FileMaker Server Admin Console Start Page, you can check for software updates. In the Software Update section, click Check Now. If an update is available, you can click a link to download the update.
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