

FileMaker 7

Instant Web Publishing Guide



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Chapter 1

About publishing FileMaker Pro databases on the web

With FileMaker® Pro, you can display your databases on the web in a variety of ways. This makes your data:

- available to many people using a compatible web browser, anywhere in the world. (You can, however, restrict access to files.)
- accessible from many locations, for example, while traveling or working remotely.

There are three ways to publish your data using FileMaker Pro.

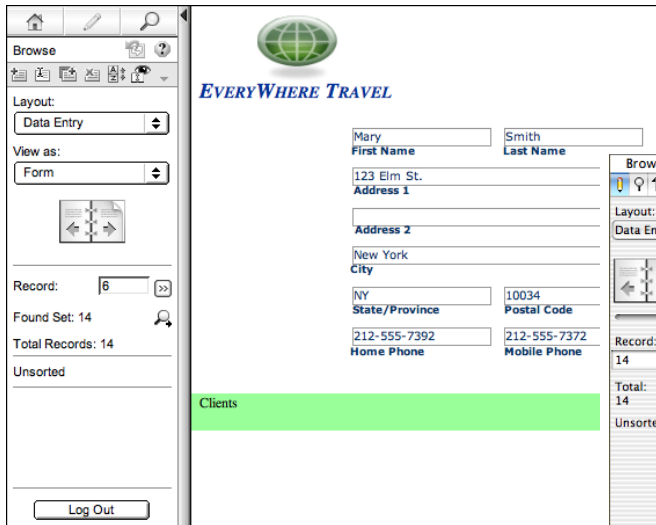
Instant Web Publishing: With Instant Web Publishing, you can quickly and easily publish your database on the web. You don't need to modify your database files or install additional software—anyone with compatible web browser software and access to the Internet or an intranet can connect to your database to view, edit, sort, or search records, if you give them access privileges. You can use additional software to perform additional tasks, for example, to configure a firewall to secure your network.

Static publishing: If your data rarely changes, or if you don't want users to have a live connection to your database, you can use static publishing. With static publishing, you export FileMaker Pro data to create a web page that you can further customize with HTML. The web page doesn't change when information in your database changes, and users don't connect to your database. (With Instant Web Publishing, data is updated in a web browser window each time the browser sends a request to FileMaker Pro.) For more information, see “Publishing FileMaker Pro data on static web pages” on page 15.

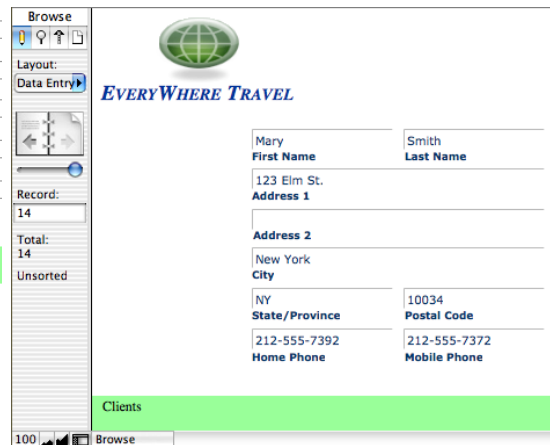
Custom Web Publishing: For more control over the appearance and functionality of your published database, use the Custom Web Publishing technologies available in the FileMaker Server Advanced software. With XML and XSLT stylesheets, you can:

- Integrate your database with another website
- Determine how users interact with data
- Control how data displays in web browsers

Important Security is increasingly important when you publish data on the web. Review the security guidelines in the *FileMaker Security Guide*, located in the Electronic Documentation folder (inside the English Extras folder).



Data from a FileMaker layout displayed in a web browser with Instant Web Publishing



Data displayed in a FileMaker Pro layout

About this guide

This guide provides information about the Instant Web Publishing and static web publishing features in FileMaker Pro.

It explains:

- what you need to publish databases on the web
- how to publish your databases using FileMaker Pro Instant Web Publishing
- what web users need to access databases
- how web users can access and interact with your database on the Internet or an intranet

FileMaker Pro documentation uses the term *publishing on the web* to refer to databases that users can access on the Internet or on an intranet using a web browser.

This guide uses “FileMaker Pro” to refer to both FileMaker Pro and FileMaker Developer, unless describing specific FileMaker Developer features.

Important You can download PDFs of FileMaker 7 documentation from www.filemaker.com/downloads. Any updates to this document are also available from the website.

Web publishing requirements

To publish databases using Instant Web Publishing you need:

- a Windows- or Mac OS-based computer running FileMaker Pro or FileMaker Server Advanced, enabled for Instant Web Publishing

Note Instant Web Publishing is not supported in the basic FileMaker Server product.

- access to the Internet or an intranet
- one or more open FileMaker Pro databases

- the FileMaker Pro web publishing components (automatically installed with a complete installation)
- Windows: To test your database for web browser access, you must have Internet Explorer by Microsoft, version 6.0 in Windows 98, Windows NT 4.0 with Service Pack 6a (SP6a) and higher, Windows 2000, Windows XP.
- Mac OS X: To test your database for web browser access, use Microsoft Internet Explorer version 5.1 and 5.2 on Mac OS X 10.2.8 or Safari 1.1 on Mac OS X 10.3.

Connecting to the Internet or an intranet

When you publish databases on the Internet or an intranet, the host computer must be running FileMaker Pro or FileMaker Server Advanced, and the databases you want to share must be open. In addition:

- It is strongly recommended that you publish your database on a computer with a full-time Internet or intranet connection using TCP/IP. You can publish databases without a full-time connection, but they are only available to users when your computer is connected to the Internet or an intranet.
- The host computer should have a dedicated *static* (permanent) IP address or a domain name. If you connect to the Internet with an Internet service provider (ISP), your IP address might be *dynamically allocated* (it is different each time you connect). A dynamic IP address makes it more difficult for users to locate your databases. If you are not sure of the type of access available to you, consult your ISP or network administrator.

About hosting databases with FileMaker Pro

FileMaker Pro Instant Web Publishing is designed for sharing data in small workgroups, or for accessing your own data on a network. When hosted with FileMaker Pro, Instant Web Publishing can share files with up to five concurrent web users.

About hosting databases with FileMaker Server Advanced

To share information with more simultaneous web users, you can host the databases with FileMaker Server Advanced. FileMaker Server Advanced also provides support for Custom Web Publishing and database connectivity technologies like XML, ODBC, and JDBC. Other benefits of hosting web published files with FileMaker Server Advanced include:

- Better support for long running applications
- Easier maintenance with support for scheduled activities like backups and remote administration
- Support for hosting more files simultaneously
- Increased security with SSL encryption

For general information, see “Hosting databases with FileMaker Server Advanced: an overview” on page 29. For more details, see the *FileMaker Server Advanced Custom Web Publishing Guide*.

Web publishing improvements

The Instant Web Publishing interface has been redesigned to look and function more like the FileMaker Pro desktop application.

- You can publish any number of FileMaker Pro layouts directly on the web. You are no longer restricted by a limited number of predefined web views.
- Like FileMaker Pro, access to data, layouts, and fields is based on the users's account settings defined in Accounts and Privileges.
- Web users can perform complex, multi-step scripts. More than 70 script steps are now supported on the web.
- Instant Web Publishing includes a status area with toolbar icons and buttons, providing all the functionality web users need to interact with your databases on the web.
- Find mode allows more flexible and powerful searches—web users can now perform multiple find requests, omit search criteria, and extend (broaden) or constrain (narrow) existing find requests.
- When web users connect, individual multi-threaded sessions are maintained. Like web applications, their transactions are “remembered” across multiple screens. To the host machine, there is no difference between a session started from a web client or a FileMaker Pro client. This means that some tasks performed by web users, such as creating found sets, setting global variables, and sorting and navigating records no longer affect the database on the host computer or other web users.

For more information on new FileMaker 7 features, including Instant Web Publishing features, see the *Installation and New Features Guide for FileMaker Pro and FileMaker Developer*.

Publishing files from previous versions of FileMaker Pro

Before updating existing databases to FileMaker Pro 7, it is important to review the *Converting FileMaker Databases from Previous Versions* guide, located in the Electronic Documentation folder (inside the English Extras folder).

Here are some considerations when converting files that are shared with Instant Web Publishing:

- You are no longer limited to picking a couple of layouts for web views—now, all layouts are available to web users, based on their user accounts. The Web Styles available with FileMaker Pro 6 and earlier are no longer supported. After you convert your files, re-evaluate which layouts should be available on the web to each user account.
- The access privileges model has been improved. Consider re-assigning user names and passwords to take advantage of the integrated security model. For more information on accounts and privileges, see FileMaker Pro Help.
- Script support for the web has been enhanced.
 - Access privileges for web users can be set to allow execution of specific, individual scripts and prevent execution of others.
 - ScriptMaker™ script steps are now clearly indicated as “web compatible”; special scripts can be created for web users. After converting your files, open each script that web users might run and enable **Indicate Web Compatibility** to see if your scripts contain steps that might produce unexpected results when executed from a web browser.

- On the web, scripts are always executed with Error Capture on. If your scripts relied on Error Capture being disabled (off), they may not function the same way. Test your files thoroughly after conversion.
- Web users can now dynamically choose a layout view to work with data, toggling between Form View, List View, and Table View. You can limit access to a view in the Views of the Layout Setup dialog box. For more information, see FileMaker Pro Help.
- FileMaker Pro clients can no longer host databases with Instant Web Publishing. The files must be web published on the host computer.
- It is no longer possible to specify the starting and ending points for a range of records in Table View. Instead, you can specify the starting point and the next 20 records (or remainder of the found set, whichever is smaller) are displayed.
- Dynamic custom home pages are no longer supported with Instant Web Publishing. However, you can link to an open database shared with Instant Web Publishing. For more information, see “Linking to a database from an HTML page” on page 15.
- The URL syntax has changed for web-published files. If you manually created a link to access a database on the web, you must update the link after converting the file. For more information, see “Linking to a database from an HTML page” on page 15.
- The Web Security databases are no longer supported. If you relied on them for web-based security, you must transfer the accounts, passwords and associated privileges into your converted database files in FileMaker Pro.
- Custom Web Publishing is not supported in FileMaker Pro. FileMaker Server Advanced provides support for Custom Web Publishing, including the delivery of XML data, and other technologies. For more information, visit www.filemaker.com.

Chapter 2

Publishing your database on the web

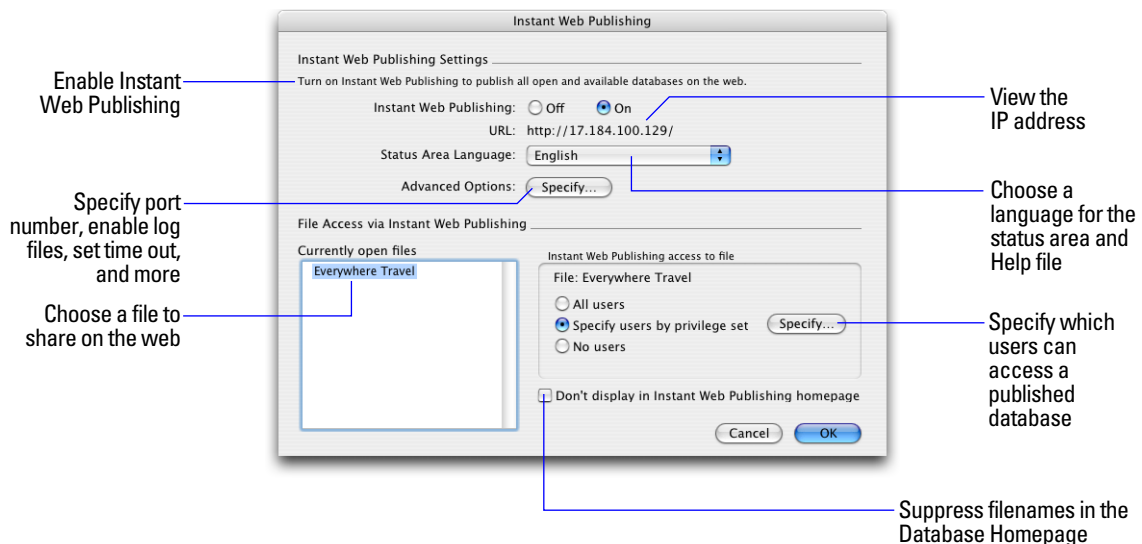
With FileMaker Pro, it is easy to share your database on the web dynamically with Instant Web Publishing, or statically by exporting data as HTML or XML. If you are connected to a LAN or WAN, you can share your file without requiring additional software. To share files over the internet, contact an Internet Service Provider (ISP) for internet access and information about hosting a database.

Sharing a database with Instant Web Publishing

To publish databases on the web with FileMaker Pro, you enable the Instant Web Publishing feature, then determine which user accounts can access each database from a web browser:

To enable Instant Web Publishing:

1. Open the database.
2. Open the Instant Web Publishing dialog box and enable Instant Web Publishing.
 - **Windows:** choose Edit menu > Sharing > Instant Web Publishing.
 - **Mac OS X:** choose FileMaker Pro menu > Sharing > Instant Web Publishing.



FileMaker Pro Instant Web Publishing dialog box

3. Select the filename to publish on the web from the list of open files.

4. Choose which users can access the file.

Choose this	To provide access to these users
All users	Anyone who has the IP address or domain name of your computer hosting the database. If the Guest account is enabled and has the Instant Web Publishing privilege set enabled, web users open the database without being prompted for an account name and password when opening files.
Specify users by privilege set	Allows select users access to the database. Users must enter their account name and password defined in Accounts and Privileges.
No users	This default setting prevents any user from accessing the database with Instant Web Publishing.

- The FileMaker Pro Log in using <account name> feature in the File Options dialog box does not work when accessing files from the web.
- Web users can open databases without specifying a password by logging in with the Guest account. See “Logging into a file” on page 18 and FileMaker Pro Help for information on enabling the Guest account for Instant Web Publishing.

5. Repeat steps 3 and 4 for each database you want to publish.

6. Click OK or choose additional settings.

Tip Select Don't display in Instant Web Publishing homepage in the Sharing dialog box to suppress a filename from appearing in the built-in Instant Web Publishing Database Homepage. This is useful if your solution includes multiple files and you don't want all the filenames displayed.

Keep these points in mind:

- The above instructions are for hosting a database with FileMaker Pro. You may want to host your files with FileMaker Server Advanced to share your databases with more web users, or to publish more files. For more information, see “Hosting databases with FileMaker Server Advanced: an overview” on page 29.
- In Mac OS X, you may be asked to provide the operating system passphrase. For more information, see “Specifying a port number for web publishing” on page 13.
- Assigning access to files in the Instant Web Publishing Sharing dialog box will change the extended privilege settings in the associated user's privilege set. You can review and modify the Extended Privileges settings directly in the Accounts and Privileges dialog box. For more information on setting or modifying access privileges in Accounts and Privileges, see FileMaker Pro Help.
- You can specify which users can access each file without enabling Instant Web Publishing.
- The list of open files and file access options in the Sharing dialog box are dimmed if you don't have Full Access privileges or don't have privileges to manage the extended privileges for a file.

Choosing a language for Instant Web Publishing

You can choose a language for the Instant Web Publishing interface, tooltips, and onscreen Help. Choosing or changing the language has no effect on your actual data.

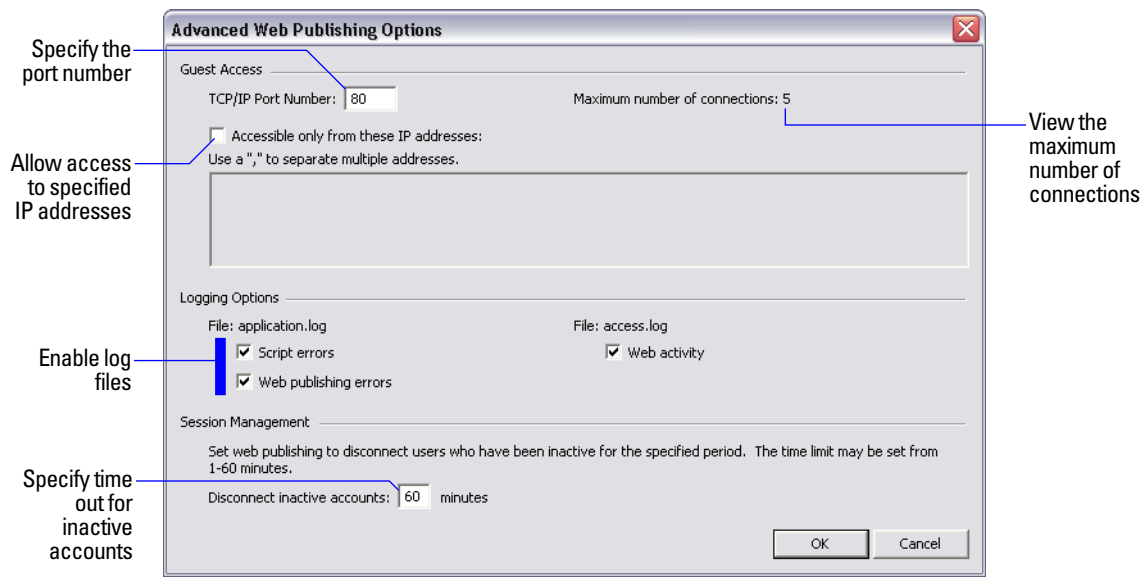
To specify the language, open the Instant Web Publishing dialog box, select the language to display in the status area, then click OK.

Specifying a port number for web publishing

The TCP/IP address in the Instant Web Publishing dialog box determines where web browsers can find FileMaker Pro databases on the host computer. By default, FileMaker files are shared from port 80. If port 80 is already in use (by a web server or another application), consider changing TCP/IP Port Number to 591. FileMaker, Inc. has registered port number 591 with the Internet Assigned Numbers Authority (IANA) specifically for web publishing.

To specify or change the port number:

1. Open the Instant Web Publishing dialog box.
2. For Advanced Options, click Specify, then type the desired TCP/IP port number.
3. Click OK, then OK to save the changes.



FileMaker Pro Advanced Web Publishing Options dialog box

Important If you use a port number other than 80, web users cannot access your database unless they append a colon, and the new port number, to your IP address (or domain name). For example, users would type 12.34.56.78:591 or <http://accounts.yourcompany.com:591> in a web browser. Or you can provide access to the database from a link that contains the IP address and port number. For more information, see “Linking to a database from an HTML page” on page 15.

Changing the port number on Mac OS X

The first time you enable Instant Web Publishing, Mac OS X requests permission to make a one-time change to your computer’s setting to facilitate web publishing on a port number below 1024. For security reasons, Mac OS X restricts access to ports below 1024. To configure FileMaker Pro to use ports below 1024, you must provide an administrator password, such as the passphrase created when you first set up Mac OS X. You do not need an administrator password to use a port

number between 1024 and 65535. For more information on creating an account with administrator privileges, see the Mac OS X Help system.

Checking the maximum number of web connections

The number of simultaneous web users accessing your files depends on which application you use to host your database. With FileMaker Pro, you can host up to five concurrent web users. Use FileMaker Server Advanced to share files with more web users.

To view the maximum number of web connections allowed:

1. Open the Instant Web Publishing dialog box.
2. For **Advanced Options**, click **Specify**, then view the **Maximum number of connections** number.
3. Click **OK**, then **OK**.

When the maximum number is reached, additional web users see an error message in the web browser when they try to access the database.

Important If you feel that you have reached the maximum number of users inappropriately, it's possible that a web user has not logged out of the database properly. You can wait for the sessions to time out or close the file to disconnect web users from the database. For more information, see "Logging out of a database and closing a web session" on page 21.

Restricting access except to specified IP addresses

You can restrict the IP addresses that can access your databases on the web. For example, you can specify that only web users from the IP address 12.34.5.6 can access your databases.

To specify which IP addresses can access your databases:

1. In the **Advanced Web Publishing Options** dialog box, select **Accessible only from these IP addresses** and type the IP address that can access your files. Separate multiple IP addresses with a comma (,).
2. Click **OK**, then **OK** to save the changes.

Note Type an asterisk (*) in the section of the IP address to grant access to web users with similar IP addresses (for example: 12.34.5.* or 12.*). You can't type an asterisk in the first section, however.

Disconnecting inactive web accounts

You can specify the amount of time web users remain connected to the database when their session, or connection to the web server, is idle. Sessions are considered idle when web users do not submit requests from the web browser, such as finding, creating, or submitting changes, changing layouts, and so on. A session also becomes idle when the web user closes the web browser window, moves to another web site, or quits the web browser without clicking the **Log Out** button.

To specify the duration that a session can be idle before it times out:

1. Open the **Advanced Web Publishing Options** dialog box.
2. For **Disconnect inactive accounts**, specify the amount of time before disconnecting idle web users (from 1 to 60 minutes), then click **OK** to save the changes.

If you are concerned that web users might not log out of the database properly, specify a short session time out. You can also create a scripted button to automatically log web users off.

See “Creating a script to log out of a database and close the session” on page 29 and “Logging out of a database and closing a web session” on page 21 for more information.

Linking to a database from an HTML page

Instead of having web users type the IP address or domain name to access your database, you can create an HTML page that specifies a link to your databases.

To view this	Use this link
Database Homepage	<code>http://<IP address>:<Port number></code>
A particular database	<code>http://<IP address>:<Port number>/fmi/iwp/cgi?-db=<database name>&-loadframes</code>

Keep these points in mind:

- If you close your files frequently, or if web users access a number of databases, consider linking to the Database Homepage, which dynamically creates links for all databases that are open and shared with Instant Web Publishing. For more information on the Database Homepage, see “Accessing a FileMaker database from the web” on page 17.
- The link you provide can access a database and show the default layout. If additional functionality is desired, consider including a startup script in the database that automates the desired tasks.
- If possible, host the databases on a static IP address or use a domain name. In some environments, a new IP address is assigned dynamically to a computer every time it reconnects to the network.
- Dynamic custom home pages are no longer supported with Instant Web Publishing. As you open or close web published databases, or if you are hosting the databases with a dynamic IP address, you must update your HTML links.
- The URL syntax for linking to a particular database is different than FileMaker Pro 6 and earlier, so you must update the link after converting the file.
- If you’re hosting files with FileMaker Pro, you can store the static HTML pages and any accompanying images in the Web folder inside the FileMaker Pro folder.

Publishing FileMaker Pro data on static web pages

With Instant Web Publishing, data is updated in a web browser window each time the browser requests data from FileMaker Pro. This is called dynamic publishing. With static publishing, the data you publish from FileMaker Pro doesn’t change with each new request.

Static publishing might be a good option for you if:

- your data doesn’t change often.
- you don’t have full-time internet access.
- you don’t want users to connect directly to your database.

To publish static data, you need:

- a web site hosted on a web server (you can enable Instant Web Publishing to have FileMaker Pro be the web server for items in the FileMaker Pro Web folder).
- FileMaker Pro, and one or more databases with data

- a computer connected to the Internet or an intranet (you only need to connect when you upload your web page to a web server)
- an application for copying (uploading) files to your web server application
- a text-editing or web-authoring application (optional)

General steps for publishing static data

With static publishing, you export data to a web page, then add the web page to your existing web site. Web users connect to your web site, not to your database.

To publish static data from FileMaker Pro:

1. Find the appropriate records, then choose **File** menu > **Export Records**, and choose **HTML Table** or **XML**.
 - Choose **HTML Table** to generate a table of data that can be viewed by supported web browsers. You can customize the appearance in a text editing or web authoring application.
 - Choose **XML** if you'd like to transform the table with an XSLT stylesheet.
2. Add links from existing web pages to your new web page.
3. Copy the web pages to your web server.

Static web pages cannot use FileMaker Pro access privileges for protection, but by storing the files in the FileMaker Web folder, you can restrict access by specifying which IP addresses can access the files in the Instant Web Publishing dialog box. For more information, see “Restricting access except to specified IP addresses” on page 14. For additional security options, see your web server documentation or check with your ISP or network administrator.

For more information on exporting records with HTML or XML, see FileMaker Pro Help. Visit www.filemaker.com for general information on XML and example files.

Note The above instructions are for hosting static pages with FileMaker Pro. If you are hosting files with FileMaker Server Advanced, see the *FileMaker Server Advanced Web Publishing Installation Guide*, included with FileMaker Server Advanced.

Chapter 3

Working with FileMaker databases on the web

FileMaker Pro Instant Web Publishing automatically provides web pages and forms for interacting with your database. Web users click buttons in the status area to browse, find, sort, add, edit, and delete records.

When you enable Instant Web Publishing and share files, anyone who has an account for a database and knows the IP address or domain name where it is hosted can access the file. Depending on their account privileges, they can:

- view records on different layouts and views
- add, duplicate, and delete records
- add and edit data in fields
- search the database to view a subset of records
- sort the database to rearrange the records

Important Define accounts and privilege sets to restrict user access to database features for both the desktop and the web.

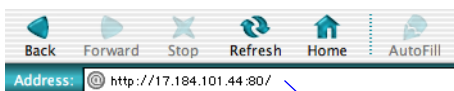
Web browser requirements

To work with a published FileMaker Pro database, web users need:

- Microsoft Internet Explorer, version 6.0 in Windows 98, Windows NT 4.0 with Service Pack 6a (SP6a) and higher, Windows 2000, Windows XP, or version 5.1 and 5.2 on Mac OS X 10.2.8.
- Safari 1.1 on Mac OS X 10.3.
- access to the Internet or an intranet.
- the Internet Protocol (IP) address or domain name of the computer that hosts your database file.
- JavaScript must be enabled in the web browser.

Accessing a FileMaker database from the web

To access the Database Homepage, web users open the web browser, then type the IP address of the host computer.

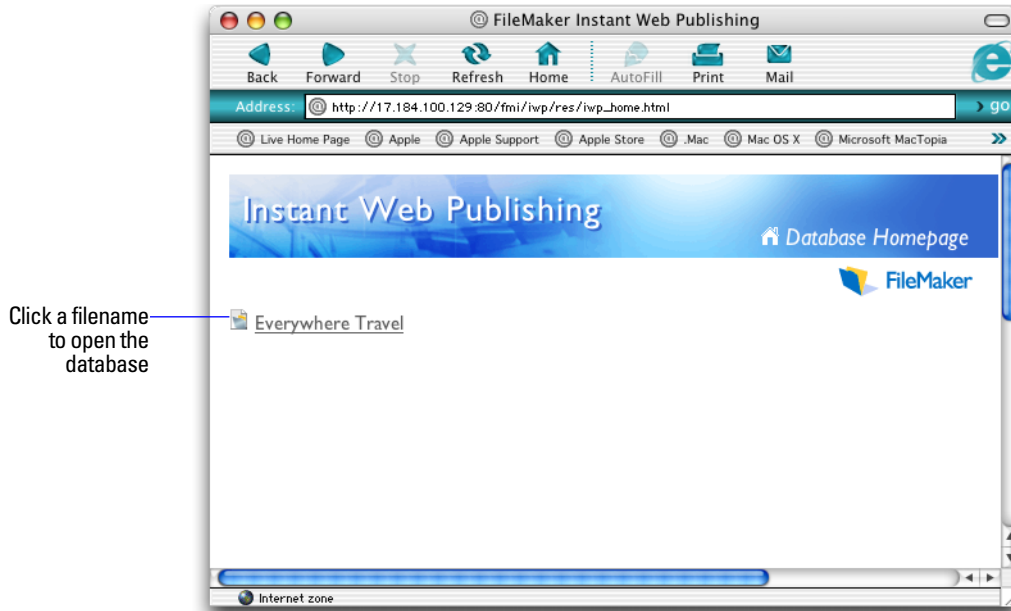


Type the IP address or domain name in the browser window

- In some cases, web users can type the domain and host name of your computer instead of the IP address, for example `http://accounts.yourcompany.com`. Or, they can type the host name, like `http://yourcompany.com`. Contact your internet service provider or network administrator for information about mapping a domain and host name to your IP address.
- If you configure FileMaker Pro to use a port number other than 80 (the default), that port number must be appended to your IP address, for example: `10.0.0.1:88`. See “Specifying a port number for web publishing” on page 13.

- You can also create an HTML page that contains a link to a database published on the web. For more information, see “Linking to a database from an HTML page” on page 15.

The Database Homepage lists the FileMaker Pro databases that are open on the host computer and enabled for web sharing. Web users click a filename to open a database.



The Database Homepage lists files shared with Instant Web Publishing

Logging into a file

When opening a database, web users may be prompted for their account information.

- If you have not defined or modified the default accounts for a file, web users must use the default user account name “Admin” if prompted to log into a database (unless the Guest account is enabled).
- If you have not assigned a password for an account, web users only specify the account name.
- If the Guest account is disabled, then users will be prompted for account name and password when they open the database.
- If the Guest account is enabled, and has the Instant Web Publishing privilege set enabled, all web users automatically open the database with the access privileges assigned to the Guest account. If the Instant Web Publishing privilege is assigned to the Guest account:
 - Web users are not prompted for an account name and password when opening a file.
 - All web users will automatically log in with the Guest account and assume the Guest account privileges. You can let users change their login accounts from a web browser with the *ReLogin* script step (for example, to switch from the Guest account to another, more full-featured account).
 - The default privilege set for Guest accounts provides “read-only” access. You can change the default privilege in Extended Privileges. For more information, see FileMaker Pro Help.

- Web users generally cannot modify their account password from a web browser. It is possible, however, to build this functionality into your database with the **Change Password** script step (to enable web users to change their password).
- With FileMaker Server Advanced, you can enable an additional log in screen that does not display filenames in the Database Homepage unless web users have an account name and password that provides access to the file.

Working with data in Instant Web Publishing

In FileMaker Pro, the Instant Web Publishing status area has been redesigned to resemble the desktop application. Web users interact with databases on the web in Browse or Find mode. All the features that enable web users to interact with your database, for example, entering, editing, deleting, and finding records, are accessible from the status area.

Data from a FileMaker layout displayed in a web browser with Instant Web Publishing

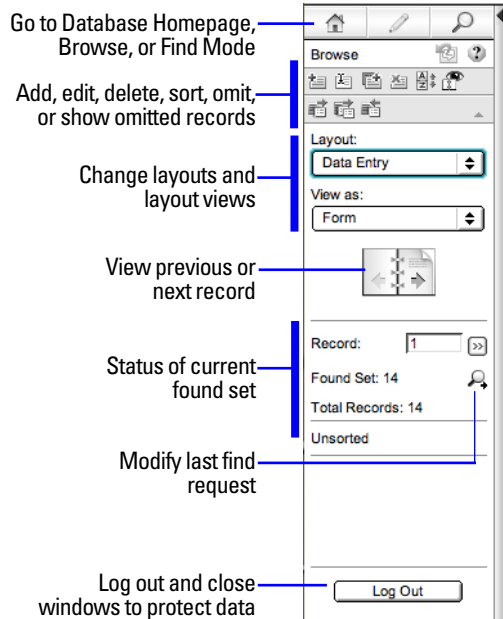
Viewing and modifying records in Browse mode

In Browse mode, web users perform tasks by clicking on an icon in the status area. If their account name and privileges provide access, they can:

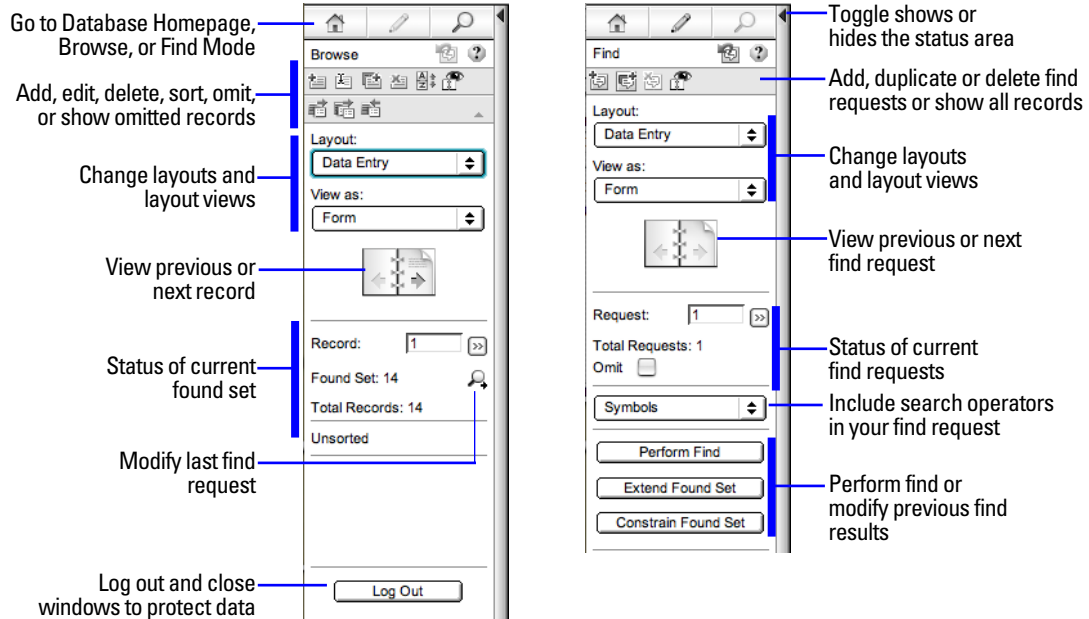
- create records
- edit records
- duplicate records
- delete records
- sort the found set (based on fields on the current layout)
- show all records
- omit the current record from the found set
- omit multiple, consecutive records from the found set
- view the omitted records (and hide the existing found set)

Hold the cursor over an icon to see its description. Procedures are outlined in the Instant Web Publishing Help. To view the Help file, click the Question Mark (?) in the status area.

Important After entering or editing data in a record, web users must click the **Submit** button in the status area to save the record to the host.



Status area in Browse mode



Status area in Find mode

Finding records

In Find mode, web users now have the same searching capabilities as FileMaker Pro desktop users. They can:

- create find requests
- duplicate find requests
- delete find requests
- show all records
- extend (broaden) or constrain (narrow) the found set

Procedures are outlined in the Instant Web Publishing Help. To view the help file, click the Question Mark (?) in the status area.

Note After entering or editing search criteria in a find request, web users must click the **Submit** button in the status area to send the request to the host.

Web users can now show or hide the status area with a toggle. To have complete control over the user interface, you can create a startup script to ensure that the status area is hidden. For more information, see “Hiding the status area to customize the interface” on page 26.

Logging out of a database and closing a web session

When web users are finished working with a database, it is important that they click the Log Out button in the status area and quit the web browser application. If they close browser windows or quit the browser application before logging out, their session is still open. This might:

- prevent others from accessing the data
- make data vulnerable to hackers until the specified time out occurs

If this happens, you can either wait for the session to time out or close the file on the host machine, which immediately disconnects all web users. There is no way to send a message to web users requesting that they log out of their sessions.

If you are concerned that web users might not log out of the database properly, you can set the session time out for a short amount of time. This minimizes the inconvenience if web users don't log out of the database properly. See “Disconnecting inactive web accounts” on page 14 for more information. You can also create a scripted button to safely log web users off. See “Creating a script to log out of a database and close the session” on page 29.

Important In addition to logging out, web users should quit the web browser application to remove their user name and password from the cache.

If you are concerned about security, consider hosting the files with FileMaker Server Advanced and enable SSL encryption in a web browser. For more information, see the *FileMaker Security Guide*, located in the Electronic Documentation folder (inside the English Extras folder).

Displaying a database with the status area hidden

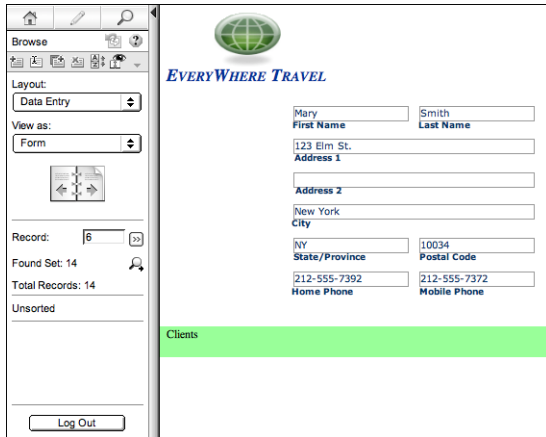
Like the desktop version of FileMaker Pro, you can create a script that hides and locks the status area when the database is opened in a web browser. This allows you to design a custom interface.

Keep these points in mind:

- If you lock the status area, you must manually create scripts and buttons that offer users all the necessary functionality. For example, you must create buttons so users can create new records, enter edit mode to modify data, delete records, change layouts, and so on. It is very important to carefully test your database files to make sure you have provided web users access to all critical features.
- To properly secure your data, you must create a script that logs web users out of the database and closes the session. For more information, see “Creating a script to log out of a database and close the session” on page 29.
- You should provide documentation to help users interact with your data from your custom environment, as most of the instructions included in the Instant Web Publishing Help file will not be appropriate.

Differences between FileMaker Pro and Instant Web Publishing

The Instant Web Publishing experience is very similar to using the FileMaker Pro desktop application. Web users can change modes, choose layouts and views, and much more.



Data from a FileMaker layout displayed in a web browser with Instant Web Publishing



Data displayed in a FileMaker Pro layout

Benefits to accessing databases with Instant Web Publishing

There are some unique advantages to the Instant Web Publishing feature in FileMaker Pro:

- You can easily and quickly deploy a solution onto the web with your existing database. You don't need to use web authoring tools, write HTML or CSS code, or use other technologies to share your data with anyone using a compatible web browser.
- You can access data remotely, whether from a home office or while travelling.
- By hiding and locking the status area, you can easily deploy a custom, web-based application.

Benefits to accessing databases with FileMaker Pro

Although accessing a database from the web is very similar to FileMaker Pro, it is not as responsive as accessing a database from a FileMaker Pro network client:

- There are no customization features available on the web. Although web users can choose layouts and different layout views, they cannot add, delete, or modify fields, layouts, scripts, relationships, and so on.
- Web users cannot directly interact with the hard drive, so import/exporting data, drag and drop, and automation with OLE, ActiveX, and Apple events will not work.
- Web users can only enter data in text, number, date, or time fields; they cannot enter or modify container field objects like images, sounds, and QuickTime files.
- Web users cannot enter data with rich text formatting (RTF).
- Web users cannot view and print complex, multi-page reports.
- Web users cannot spell check their data.
- Web users should only interact with a database from one web browser window.
- FileMaker Pro keyboard commands are not available for use in the web browser.

Chapter 4

Designing a database for Instant Web Publishing

With FileMaker Pro, data displayed on a web form with Instant Web Publishing looks and behaves similarly to a FileMaker layout. When you design solutions that are accessed on the web, there are some limitations of the technologies that you should be aware of. For example, FileMaker Pro layouts are rendered on the web using Cascading Style Sheets, which doesn't offer as robust graphics support as the FileMaker Pro application.

Tips for designing layouts for Instant Web Publishing

FileMaker Pro layouts determine which fields web users see, and how the data is formatted. You are no longer limited to picking a couple of layouts to display in web views.

- Like FileMaker Pro, default web layouts can be specified with startup scripts.
- User accounts and privileges determine which layouts web users can view.
- Web users can only search on fields that are present on the current layout.
- If you're designing layouts specifically for searching, note that web users can't enter search criteria for summary, global, or container fields.

Tips for rendering layouts in Instant Web Publishing

Layouts are rendered in web browsers using Cascading Style Sheets (CSS). Not all layout objects can display with CSS. For example:

- Rounded rectangles are displayed as rectangles.
- Avoid diagonal lines, pen patterns, fill patterns, and ovals. They do not display in web browsers.
- Buttons are displayed as rectangles (without rounded corners).
- Complex or layered pictures are not rendered properly. It's best to create composite pictures in a drawing program, then paste the image into the FileMaker Pro layout.
- If your images have transparent components, use the GIF file format.
- For forms and reports, make fields large enough to display and print the data. In the web browser, fields do not expand when they are active. You can format fields to display a scroll bar so users can view the field contents.
- Radio buttons and checkboxes display as standard HTML controls. If they are getting cropped, enlarge the fields on the FileMaker Pro layout.
- Instant Web Publishing offers limited text styles. Paragraph text styles, tab stops, and vertical alignment are not supported. Additionally, underline, word underline and double underline are all rendered as regular underline. Evaluate your layouts in all supported web browsers before sharing the database with others.
- If layout text is wrapping to a new line, increase the size of the text boundaries in the FileMaker Pro layout. For example, if the text is aligned left, drag the lower right handle slightly towards the right.
- Buttons can only display one line of text. Make sure the button is large enough to accommodate the text in supported web browsers.

Design considerations for List View and Table View

With Instant Web Publishing, users can now dynamically choose a layout view to interact with data on the current layout, (provided that you make the layout view available in the Layout Setup dialog box).

Here are key differences between views in FileMaker Pro and Instant Web Publishing:

- List View displays five records at a time and Table View displays 20. The current record is always at the top, or the first row. When new records are created, they become the current record. You can display previous record ranges with the controls in the status area.
- Web users can now add, edit, and delete records and find requests in List View and Table View.
- In Table View, records can be sorted in ascending or descending order by clicking the column heading (the field name). Sorting is enabled in the **Table View Properties** section of the Layout Setup dialog box. For more information, see FileMaker Pro Help.

Tips for working with data in a web browser

- Formatting for date, time, and number fields is specified in the layout.
- Repeating field data is now displayed in web browsers.
- Web browsers ignore the tab order defined in a layout. Objects are rendered in the order in which they are stacked in a layout, with objects at the background of a layout being rendered before objects in the foreground. Use this to determine the tab order by stacking objects on the layout in the order you want users to tab into them.
- Pop-up menus and pop-up lists display as HTML pop-up menus. Web users can't edit value lists by using an Edit item, or enter values that aren't in a value list by using an Other item.
- If your solution includes multiple files, Instant Web Publishing must be enabled in all databases. If you don't want related files to be accessed directly, you can exclude a filename from the Database Homepage by enabling the **Don't display in the Instant Web Publishing Database Homepage** option in the Sharing dialog box.
- If your layout contains a portal, related records also display in a web browser within a portal, provided that the related file or table is also shared with Instant Web Publishing. When you submit a record containing a portal you might be notified that another user has modified one of the records since you loaded the page. If this occurs, refresh your page and submit the data again. If this is a likely scenario, consider using portals as "read only" forms. Alternatively, you can edit related record data in portals by using the **Go To Related Record** script step and editing them directly.
- Web users can create and edit portal records. To delete a portal record, you must provide a scripted button that selects the appropriate portal record, then deletes it.

General database design considerations

Keep the following points in mind:

- If you are designing a database that will be accessed by both Instant Web Publishing and FileMaker Pro network clients, it's best to design with web clients in mind to ensure compatibility across both technologies.

- Communication from a client to the FileMaker host goes through intermediary technologies with Instant Web Publishing. When you request data with Instant Web Publishing, you are sending the request from a web browser to a virtual FileMaker environment, which processes your request, then requests and retrieves the results from FileMaker Pro. These results are then passed back to the browser. This interaction is usually undetectable to web users, but occasionally you must take action to make sure the results are the same regardless of how clients access your database. Because web users don't have a direct connection to the host, they aren't notified immediately when data changes. For example, you may need to update your scripts to include the Commit Record/Request to refresh the browser window. For more information, see “Script steps tips and considerations” on page 27 and “Creating a script to log out of a database and close the session” on page 29.
- When defining account names and passwords, use characters included in the ISO Latin-1 character set (except colons). To avoid characters that may be interpreted incorrectly on the web, you may want to limit account names and passwords to alphabetic and numeric characters only.
- It is best not to set too many field validations on a layout. When web users submit a record, an error is returned each time a validation has not been met.
- Typically, third party plug-ins can be used for web published databases if they do not attempt to display information to an end-user's screen, if they do not require direct end-user interaction, if they do not interact with the FileMaker Pro user interface, or otherwise require interaction from end users.
- When hosting a database with FileMaker Server Advanced, only use plug-ins that have been enabled for the FileMaker Server Web Publishing Engine. (In general, a plug-in designed for use only with FileMaker Pro will not be compatible with the Web Publishing Engine.) For information on installing plug-ins on FileMaker Server Advanced, see the *FileMaker Server Advanced Web Publishing Installation Guide*, included with FileMaker Server Advanced.
- You should not access the same file from multiple browser windows.

Working with graphics, sounds, and movies on the web

When you publish a database on the web with Instant Web Publishing, web users can work with data in container fields in limited ways:

- Web users can't play sounds or display OLE objects in a container field—a graphic is displayed instead.
- Web users can't add graphics, sounds, or movies to a container field.

Important Images can either be stored inside the database itself or, for best performance, stored as file reference using a relative path. If you're hosting the database with FileMaker Pro, referenced image and movie files must be stored in the Web folder, in the FileMaker Pro folder.

Setting the initial layout and view

When a FileMaker Pro database is set to perform a script at startup, users who access the database through Instant Web Publishing can see the results of that script each time they open the database.

By setting a startup script, you can determine which layout and view web users see when they open the database with the following script steps:

- Go to Layout [Layout Name]
- Enter Browse Mode []
- View As [Form View]

You can also specify a starting layout in the File Options dialog box. See FileMaker Pro Help for more information.

Hiding the status area to customize the interface

FileMaker Pro automatically generates interface controls in the status area for interacting with databases shared with Instant Web Publishing. These controls allow the user to create, alter, and delete records; switch views and modes when accessing databases via a web browser; find and sort records; open HTML Help; and so on. If you want to present your own interface for performing all database tasks, you can create a script that hides the status area when opening the file.

To suppress Instant Web Publishing controls, create a startup script that includes Toggle Status Area [Hide] as one of the first steps. For solutions involving multiple database files, use this startup script step in each file.

Important When you suppress the FileMaker Pro Instant Web Publishing controls, web users are completely dependent on your scripted buttons. You must include a button that lets web users log out of the solution, as well as perform other tasks. See “Creating a script to log out of a database and close the session” on page 29 for details.

You can include scripted buttons on your layout to:

- add, select, navigate, edit, and delete records.
- specify search criteria and perform find requests.
- sort the database in all desirable ways.
- change layouts and layout views.
- continue or cancel scripts that may have paused.
- open other database files (the databases must be open and shared with Instant Web Publishing on the host computer).

Important If you are suppressing the status area, thoroughly test your database to make sure you have provided users all required functionality.

Specifying the sort order for web users

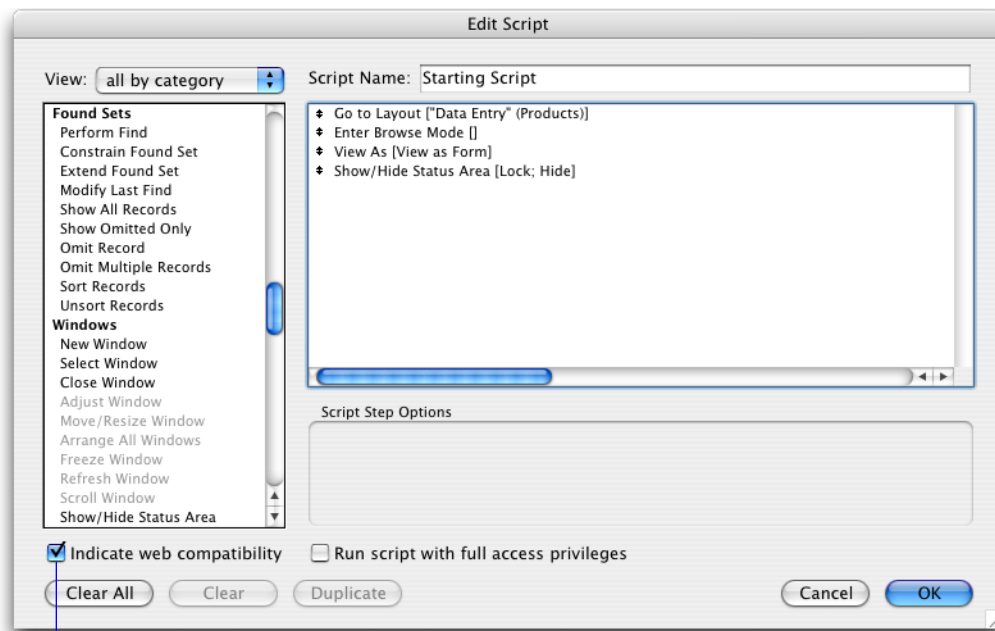
With Instant Web Publishing, you no longer specify sort fields on a prescribed layout. Web users can now sort data based on fields on the current layout. To control which fields web users can sort on, you can:

- restrict access to layouts with the user’s account in Accounts and Privileges.
- hide the status area and create buttons that are scripted to sort the data by fields specified in the script.

Scripts and Instant Web Publishing

The ScriptMaker feature in FileMaker Pro is useful for automating frequently performed tasks, or for combining several tasks. When used in Instant Web Publishing, it can allow web users to perform more tasks, or to easily perform a series of tasks simply by clicking a button.

FileMaker Pro now supports over 70 script steps with Instant Web Publishing and Custom Web Publishing. Web users can perform a variety of automated tasks when you provide buttons on your FileMaker Pro layouts or set scripts to run when a database is opened or logged out. To see script steps that are not supported, select the **Indicate Web Compatibility** checkbox in the Edit Script dialog box. Dimmed script steps are not supported on the web. For information on individual script steps, see FileMaker Pro Help.



Select **Indicate web compatibility** to dim script steps that are not web-compatible

Script steps tips and considerations

Although many script steps work identically on the web, there are several that work differently due to design limitations. Before sharing your database, evaluate all scripts and buttons that will be executed from a web browser. Be sure to log in with different user accounts to make sure they work as expected for all clients.

Keep these tips and considerations in mind:

- Use accounts and privileges to restrict the set of scripts that a web user can execute. Verify that the scripts contain only web-compatible script steps, and only provide access to scripts that should be used from a web browser.
- Consider the side effects of scripts that execute a combination of steps that are controlled by access privileges. For example, if a script includes a step to delete records, and a web user does not log in with an account that allows record deletion, the script will not execute the Delete

Records script step. However, the script might continue to run, which could lead to unexpected results.

- In scripts, you can select **Run script with full access privileges** to allow scripts to perform tasks that you would not grant individuals access to. For example, you can prevent users from deleting records with their accounts and privileges, but still allow them to run a script that would delete certain types of records under conditions predefined within a script.
- If your scripts contain steps that are unsupported, for example, steps that are not web-compatible, use the **Allow User Abort** script step to determine how subsequent steps are handled.
 - If the **Allow User Abort** script step option is enabled (on), unsupported script steps will stop the script from continuing.
 - If **Allow User Abort** is off, unsupported script steps are skipped over and the script continues to execute.
 - If this script step is not included, scripts are executed as if the feature is enabled, so unsupported script steps will stop scripts.
- Some scripts that work with one step from a FileMaker Pro client may require an additional **Commit Record/Request** step to save the data to the host. Because web users don't have a direct connection to the host, they aren't notified when data changes. For example, features like conditional value lists aren't as responsive for web clients because the data must be saved to the host before the effects are seen in the value list field.
- Similarly, any script that modifies data should include the **Commit Record/Request** step, because all data changes aren't visible in the browser until the data is saved, or "submitted" to the server. This includes several script steps like **Cut**, **Copy**, **Paste**, and so on. Many single-step buttons should be converted into scripted buttons to include the **Commit Record/Request** step. When designing scripts that will be executed from a web browser, it's a good idea to include the **Commit Record/Request** step at the end of a script to make sure all changes are saved.
- To create conditional scripts based on the type of client, use the **Get [ApplicationVersion]** function. If the value returned includes "Web Publishing" you know that the current user is accessing your database with Instant Web Publishing. For more information on functions, see *FileMaker Pro Help*.
- Because there are intermediary technologies involved when accessing a FileMaker Pro database from a web browser, you must assess the activities on the web server before closing a file. Some scripts open additional "windows" in the virtual FileMaker environment on the web server, and they must be closed before the session can be terminated. Any open windows will be closed automatically if web users click the **Log Out** button or when the session times out. For more information, see "Creating a script to log out of a database and close the session," below.
- After converting your files, you should open each script that web users might run and enable **Indicate Web Compatibility** to ensure that the script will execute properly with Instant Web Publishing.

The script steps below function differently on the web than in the desktop application. For information on all script steps, see FileMaker Pro Help.

Script step	Behavior in Instant Web Publishing
Perform Script	Scripts cannot perform in other files, unless the files are open and shared with Instant Web Publishing on the host or server machine.
Exit Application	Closes all windows, ends the user's session, and takes the user back to the Database Homepage.
Allow User Abort	Determines how unsupported script steps are handled. Enable to stop scripts from continuing, and disable to skip over unsupported steps. See above for more details.
Set Error Capture	This is always enabled with Instant Web Publishing, and prevents web users from aborting scripts.
Pause/Resume script	The script pauses until the user clicks Resume or executes the Resume script step by clicking a scripted button, or the session times out.
Sort	Sorts must be saved with the script to execute in Instant Web Publishing.
Open URL	Opens a complete URL from a text or calculation field in a new browser window (URL must contain "http://" if the target URL starts with "http://").
Go to Field	You cannot use Go to Field to make a particular field active in the web browser, but you can use this script in conjunction with other script steps to perform tasks. For example, you can go to a field, copy the contents, go to another field and paste the value. To see the effect in the browser, be sure to save the record with the Commit Record script step.
Commit Record/Request	Submits the record to the database.

Creating a script to log out of a database and close the session

It is important that web users properly close their session by clicking the **Log Out** button in the status area. If they close browser windows or quit the browser before clicking the **Log Out** button, their session is still open. This might prevent others from accessing the database and could make data vulnerable to hackers until the specified time out occurs.

Important Your script should include the **Exit Application** script step, which closes all windows, ends the user's session, and takes the user back to the Database Homepage.

Hosting databases with FileMaker Server Advanced: an overview

Without planning, you might have to redefine links to other files or images. If your database is maintaining file path information for container field objects or file relationships, you should store the file paths as a relative link. It's also best to store all files in the same folder.

Here are general steps for hosting Instant Web Publishing files with FileMaker Server Advanced:

1. Move the FileMaker Pro databases into the Databases folder in the FileMaker Server folder.
2. Move the contents of the Web folder to the root folder of the web server software. Make sure the relative path is preserved.

For IIS, move the files to: <root drive>\Inetpub\wwwroot

For Apache, move the files to: /Library/WebServer/Documents

Note Verify the path with the server administrator.

3. Redirect your URLs to: `http://<IP address>/fmi/iwp` or `http://<domain name>/fmi/iwp` so web users can locate your database.

For information on enabling Instant Web Publishing in FileMaker Server Advanced, see the *FileMaker Server Advanced Web Publishing Installation Guide*, included with FileMaker Server Advanced.

Documenting your solution

Instant Web Publishing cannot cover the nuances of how web users should interact with your particular databases. It's helpful if you can provide your own documentation, especially if you're presenting a lot of layouts and automating tasks with scripted buttons.

You should include information about the following information in your documentation:

- Browsing and finding records: Let web users know that they work with data in Browse mode or Find mode. Instruct users how to create, edit, delete, find, and sort records.
- Navigating the database: Instruct web users on how to view records in appropriate layouts and layout views.
- It is important that web users properly close their session, or connection to the host computer, by clicking the Log Out button in the status area. For more information, see “Logging out of a database and closing a web session” on page 21.

Chapter 5

Testing, monitoring, and securing your site

Before notifying users that your published database is available, it is important to verify that it looks and functions as you expect.

- Test features like finding, adding, deleting, and sorting records with different accounts and privilege sets.
- Verify that various privilege sets are performing as expected by logging in with different accounts. Make sure unauthorized users can't access or modify your data.
- Click all scripted buttons to verify that the outcome is expected. See “Scripts and Instant Web Publishing” on page 27 for information on designing web-friendly scripts.
- Test your published database with different operating systems and browsers.
- If the web pages aren't displaying properly, see “Web browser requirements” on page 17 and review “Designing a database for Instant Web Publishing” on page 23.

Testing your database with a network connection

To access a published database, open web browser software, type the IP address or domain name of the host computer and press Return or Enter. You can view an IP address in the Instant Web Publishing dialog box. For more information, “Accessing a FileMaker database from the web” on page 17.

Testing your database without a network connection

If you don't have a network connection, you should still test your database in all compatible web browsers. Open the web browser software and type `http://localhost/` or `http://127.0.0.1/` and press Return or Enter. The Database Homepage should display a list of all open database files that have Instant Web Publishing enabled.

Monitoring web activity with log files

You can set logging options to track the activity your database receives from web users. When you enable the log files, FileMaker creates log files in the FileMaker Pro 7 > Web logs folder. You can view them in any application that opens text files.

To create log files:

1. Windows: choose Edit menu > Sharing > Instant Web Publishing.

Mac OS X: choose FileMaker Pro menu > Sharing > Instant Web Publishing.

2. For Advanced Options, click Specify, then enable the log files you want to create.

Select	To track	In this file
Script errors	Information about errors generated when web users execute scripts (for example, it documents script steps that are skipped if they're not web-compatible)	application.log

Select	To track	In this file
Web publishing errors	General information about errors generated when accessing or interacting with web-shared databases	application.log
Web activity	Information about web users' activities (for example, the users' IP addresses and pages accessed)	access.log

For a list of error codes and descriptions, see the topic “Get(Last Error) function” in FileMaker Pro Help.

If you don't want to create log files, clear the checkboxes in the Log Activity area.

3. Click **OK**, then **OK** to save the changes.

Keep these points in mind:

- The web activity log continuously adds entries to the file. The entries and files aren't automatically deleted, and the files can become very large. If you create log files, consider archiving them on a regular schedule to save hard disk space on your host computer.
- To maximize security, be sure web users can't view or copy log files by gaining access to the FileMaker Pro folder.
- Entries are added to a log file in the order that FileMaker processes them.
- You can also use FileMaker Pro functions to track user activity. For more information on functions, see FileMaker Pro Help.

Securing your data

When you publish a database, it is very important to determine who should have access to the data and to control which tasks users can perform. For complete information on securing your database, see the *FileMaker Security Guide*, located in the Electronic Documentation folder (inside the English Extras folder).

Keep these security considerations in mind when publishing databases on the web:

- User accounts operate the same regardless of which technologies clients use to access your files. For example, if you create an account that restricts access to deleting records, users who access the database with that account name and password will not be able to delete records, whether they access the data from a web browser, an ODBC data source, or another copy of FileMaker Pro.
- It's safest to create a “web-only” database specifically for web publishing. Make sure the file contains only the layouts, scripts, and field definitions that you want to expose to the public. For more information, see the *FileMaker Security Guide*.
- If web users access your files with multiple clients, consider providing them with multiple accounts. For example, give them an account name and password with more limited access when accessing the database from a web browser versus another copy of FileMaker Pro.
- When enabling Instant Web Publishing for individual files, assign accounts and privilege sets to web users instead of providing access to all users.
- If an account limits record-by-record browse privileges but does not limit the privilege to delete records, it is possible for users to delete records they cannot view.

- If the same account opens related files, the related data is displayed on layouts containing related fields.
- The Web Security databases are no longer supported. Instant Web Publishing uses the accounts and privilege sets defined in FileMaker Pro for the best security. For more information, see the *FileMaker Pro User's Guide*.
- Never store sensitive documents or databases inside the Web folder. With FileMaker Pro, you can put images to share with container fields or static HTML pages that you want to publish in the Web folder inside the FileMaker Pro folder, but due to web server architecture, all files in the Web folder are accessible and might be deleted by others.
- Carefully review your scripts to make sure they are web compatible and that the combination of steps don't produce unexpected results. For more information, see "Scripts and Instant Web Publishing" on page 27.

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