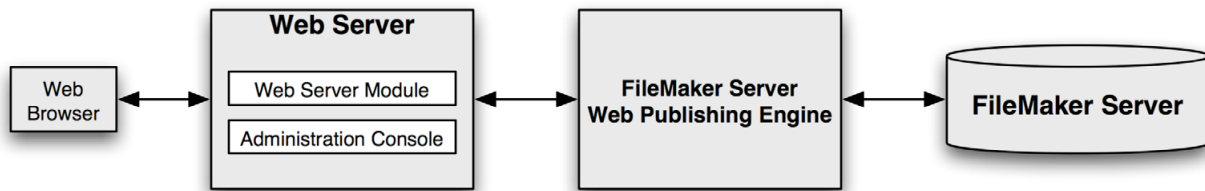




FileMaker Server 7 Advanced QuickStart Guide

Note: this document covers FMSA v3 only.

I. Product Overview:



FileMaker[®] Server 7 Advanced uses the following software components:

Web Server: FileMaker Server 7 Advanced requires an Apache (Mac OS X) or IIS (Windows) web server. The web server must be installed and configured before you install the Web Server Module and Administration Console.

Web Server Module and Administration Console: These two software components are always installed together as a unit on the web server host computer. The Web Server Module enables the Web Publishing Engine to connect to the web server. You use the Administration Console in a web browser to configure the Web Publishing Engine.

Web Publishing Engine (WPE): The Web Publishing Engine supports Instant Web Publishing and Custom Web Publishing with XML and XSLT using databases hosted by FileMaker Server.

FileMaker Server 7 (FMS): FileMaker Server 7 is required for hosting the databases that will be published on the web.

FileMaker Server 7 Advanced (FMSA): FileMaker Server 7 Advanced refers to the complete product that includes FileMaker Server 7, the Web Publishing Engine, and the Administration Console.

II. Goals of this guide:

This guide walks through the simplest configuration of FileMaker Server 7 Advanced – the single machine configuration – in which all of the components listed above are installed on a single machine.

For information about more complex configurations, refer to pages 13-15 of the *FileMaker Server 7 Advanced Web Publishing Installation Guide*.

III. Before you start:

1. Configure and Test the Web Server

Before installing FileMaker Server 7 Advanced ensure that the Apache (Mac OS X) or IIS (Windows) web server has been properly configured.

For more information on configuring Apache or IIS web servers, refer to the documentation that accompanies the web server.

Once you have ensured that the web server is running, we also recommend the following settings for use with FileMaker Server 7 Advanced.

2. OS X Performance Cache

If the Web Server Module is installed on Mac OS X Server, we recommend that you turn off the Performance Caching option for the Web Server on this machine. This performance cache may interfere with FileMaker Server 7 Advanced and data may not refresh correctly.

Disabling the Performance Cache on Mac OS X Server 10.3:

- i. In “Server Admin”, click “Web” in the list for the desired server
- ii. Click “Settings” in the button bar
- iii. In the “Sites” pane, double-click the site in the list
- iv. In the “Options” pane, uncheck the “Performance Cache” option
- v. Click “Save”

For help disabling the cache on Mac OS X Server 10.2, see page 372 of the *Mac OS X Server Administrator’s Guide for version 10.2.3.*”

3. Windows IIS Directory Security

By default, Windows will attempt to authenticate all requests that are made via the IIS web server. The simplest approach for making IIS work with the WPE is to disable IIS Authentication.

Disabling IIS Authentication:

- i. Open the “Internet Services Manager” from Start Menu > Programs > Administrative Tools
- ii. Select the website and choose Action Menu > ”Properties”
- iii. In the “Directory Security” properties sheet, click “Edit” for Authentication Methods
- iv. In the “Authentication Methods” dialog box, do the following:
 - a. Ensure that “Anonymous Access” is enabled
 - b. Disable all of the authentication methods under “Authenticated access”

For more information about working with IIS Directory Security, refer to pages 24-25 of the *FileMaker Server Advanced Web Publishing Installation Guide*.

IV. Deploying FileMaker Server 7 Advanced

1. Run the FileMaker Server 7 installer

Install and configure FileMaker Server 7 on the target machine. Before proceeding to Step #2, ensure that you can access hosted databases on FileMaker Server 7 via a FileMaker Pro 7 client.

For more information about configuring FileMaker Server 7, refer to the *FileMaker Server 7 Administrator’s Guide*.

2. Run the FileMaker Server 7 Web Publishing Engine installer

The “Easy Install” option on Mac OS X or the “Complete” option on the Windows installer will install all of the necessary components for the single machine configuration.

3. Reboot the machine to activate all required services

4. Register the WPE in FileMaker Server 7

You must configure FileMaker Server 7 with an identifier and passcode string to protect the connection between the WPE and FMS. These strings will need to be entered into both the FileMaker Server Admin Tool (SAT) and the Web Publishing Admin Console.

To configure the identifier and passcode in the FMS Admin Tool:

Windows:

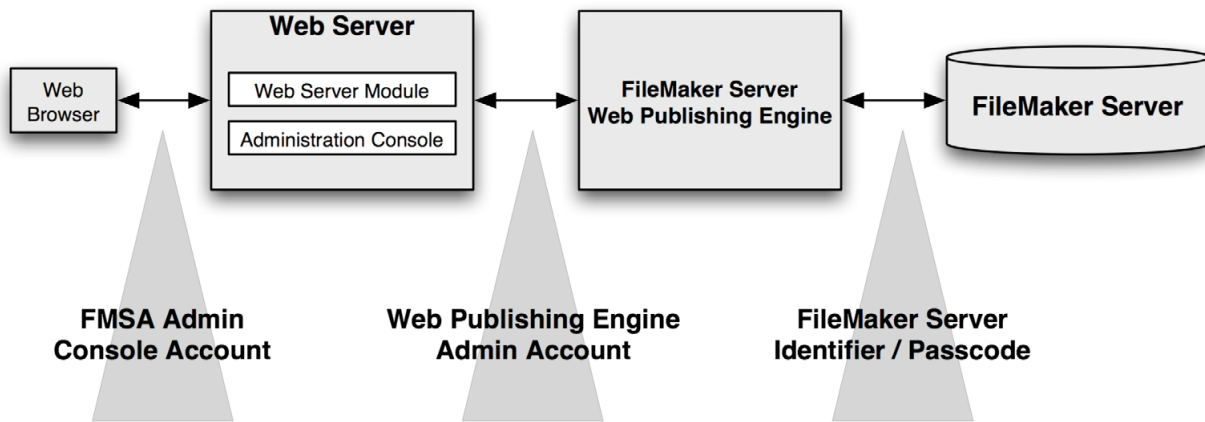
- i. Connect to the FileMaker Server at address “127.0.0.1”
- ii. Open the FileMaker Server Properties dialog and select the “Clients” tab
- iii. Click the “FileMaker Server Advanced Settings...” button
- iv. Then click “Add...” to create an identifier and passcode.

Mac OS X:

- i. Connect to the FileMaker Server at address “127.0.0.1”
- ii. Click the “Configure” icon on the toolbar
- iii. Click the “Clients” tab
- iv. Click the “Add” button to the right of the FileMaker Web Publishing Engines list
- v. Modify the text in the list to set the identifier and passcode.

5. Configure the Web Publishing Engine

Password Overview:



The Web Publishing Engine uses 3 separate credentials to protect the system from improper use:

- i. FMSA Admin Console Account – this user name/password combination is used to restrict access to the web interface used for configuring FileMaker Server Advanced. These credentials will be required every time an administrator logs in to the Web Publishing Administration Console.
- ii. Web Publishing Engine Admin Account – this user name/password is used to secure the configuration interface of the Web Publishing Engine. Its purpose is to authenticate the Admin Console to protect the WPE from being taken over by an unauthorized Admin Console. These credentials are stored in the preferences for the Admin Console and are automatically used to connect and configure the Web Publishing Engine. The only times an administrator will need to provide these credentials are during initial configuration and in the event that the Web Admin Console is reinstalled or moved to a new machine.

Note: If you choose not to disable IIS Directory Security, then this user name and password must be created as a local windows account for the admin console to function properly.

- iii. FileMaker Server Identifier/Passcode – this is the identifier and passcode that were configured in Step 4 above when registering the WPE in the FileMaker Server SAT. These strings must be entered identically in both the FMS configuration and the screen in the FMSA Admin Console. This is used to secure the connection between the Web Publishing Engine and the FileMaker Server to ensure that an unauthorized WPE cannot connect to a FileMaker Server.

Initial Configuration of the Web Publishing Engine:

- i. Load the Web Admin Console by opening a web browser window to the URL: <http://localhost/fmi/config>

Note: If you are using SSL, then you will need to connect to <https://<registered domain name>/fmi/config>

- ii. On the first screen of the admin console, establish the FMSA Admin Console Account as described in Part i of the Password Overview. Click “Apply” to proceed to the next screen.
- iii. Since we are doing a single machine configuration, the Web Publishing Engine is installed on the same machine as the web server. No change is necessary here. Click Continue to proceed to the next screen.
- iv. The admin console is now asking to establish the WPE Admin Account as described in Part ii of the Password Overview. Click “Apply” to establish the account and proceed to the next screen.
- v. The admin console is now asking to configure the connection to FileMaker Server.

Since this is a single machine configuration, leave the option selected for “FileMaker Server is installed on the same machine as Web Publishing Engine.”

Enter the values for the FileMaker Server identifier and passcode that were established in Step 4 above. These are the credentials that are described in Part iii of the Password Overview.

Click the “Commit” button at the bottom of the Web Admin Console page to save the changes made to the FileMaker Server settings.

- vi. A pop-up dialog will appear saying “Changes to the FileMaker Server settings have been saved. You must restart the Web Publishing Engine to apply the changes.” Click OK to restart the Web Publishing Engine – this will complete the configuration.

- vii. The admin console will automatically display the “Overview” tab. The screen should now show a single blue box that lists the Web Server, Publishing Engine, and FileMaker Server.

Refer to page 38 in the *FileMaker Server Advanced Web Publishing Installation Guide* for a more detailed explanation of the overview page.

The system is now configured. The default values that are established will allow you to start publishing databases to the web with FileMaker Server 7 Advanced. Refer to the *Web Publishing Installation Guide* for information about customizing the other settings.

6. Verify Success

The simplest test is to try Instant Web Publishing. If there are any web enabled databases on the FileMaker Server, they should now be accessible via the Instant Web Publishing home page.

Try accessing the sample database that is installed with FileMaker Server 7 named “FMServer_Sample_Config”.

Note: If you upgraded your server from v1 or v2, then you must first add the “fmiwp” extended privilege to the “FMServer_Sample_Config” database by using the “Accounts and Privileges” dialog in FileMaker Pro 7.

For more information about configuring the extended privileges, see page 17 of the *Custom Web Publishing Guide*, page 12 of the *Instant Web Publishing Guide* or the FileMaker Pro Help.

- i. Connect to the Instant Web Publishing home page by pointing a compatible web browser (Safari on Mac OS X or Internet Explorer on Windows) to:

<http://localhost/fmi/iwp>
- ii. The homepage should display a list of databases accessible via IWP.
- iii. Click on one of the database names to log in to the database. If successful, you should now see your FileMaker database rendered as a web page!

7. Additional Resources

This completes the QuickStart guide. If you need additional troubleshooting information, you may refer to the following sources:

- i. FileMaker Server 7 Advanced Documentation
 - *Web Publishing Installation Guide*
 - *Instant Web Publishing Guide*
 - *Custom Web Publishing Guide*
- ii. FileMaker TechInfo Database online at:
<http://www.filemaker.com/support/techinfo.html>