

6-in-1 Estate Administration Software FileMaker Platform – Windows Server FMS v21.1.1.40 | FMP v20.3.2.201 Revised 2/9/2025

HOW TO: Update FileMaker Server to v21 from v19 or later on Windows Server

The following offers step-by-step instructions for updating FileMaker Server on Windows.

- DRAFT –

This document has been updated for 2025 & FileMaker Server 21, but is being expanded. Check back over the week of 2/10/2025 for updates.

Table of Contents

1)	INTRO Part 1: Overview	.2
2)	INTRO Part 2: Warnings and Important Notes	. 2
3)	INTRO Part 3: System Requirements	.3
4)	Download the latest version	.3
5)	Verify Cache Settings	.5
6)	Disconnect Users and Close Databases	.6
7)	Start the installer	10
8)	Verify Service: Automatic startup type	16
9)	Verify Server Cache	17
10)	Open the Admin Console and verify operation	18
11)	Notify 6-in-1 Users	19



6-in-1 Estate Administration Software FileMaker Platform – Windows Server FMS v21.1.1.40 | FMP v20.3.2.201 Revised 2/9/2025

1) INTRO Part 1: Overview

The process of updating FileMaker Server from earlier versions (back to v19.0) is relatively straight forward. These instructions assume that you're updating a FileMaker Server installation for 6-in-1, and therefore skip steps that might be necessary in different use cases. For example, we do not use server-side script schedules, etc., so we do not take the time to backup those types of settings as Claris' guide would indicate. If you have customized your installation in any way, or have any concerns/questions, please refer to Claris' installation instructions here: <u>Claris Installation and Configuration Guide for FMS</u>

2) INTRO Part 2: Warnings and Important Notes

Please read the following important notes and warnings:

- This document uses the acronym, FMS for FileMaker Server and FMP for FileMaker Pro.
- Claris has moved to a common marketing theme of naming products with calendar years. Behind the hood, however, the version numbers of the respective products have stayed in line. After FileMaker Pro/Server 19 came 2023 (v20.x), followed by the current 2024 (v21.x). This documentation generally refers to the 'behind the hood' version number of 20, and 21, respectively.
- As of the writing of this document, we install FMS 21, but FMP (the client software) v20. They work together seamlessly.
- This document is **NOT applicable to customers running FileMaker Server 11**, it is only for customers running version 19.0 or later. We stopped updating the FileMaker 11 variant of our product in 2024.
- These instructions are based on Windows Server 2019, Datacenter edition, but should be generally equivalent for other supported versions of Windows Server but can be adapted for Server 2016 or 2022 (although 2016 is not technically supported by Claris).
- While these instructions walk through an update from the earliest version of FileMaker Server 19 (19.0.1.103) to the most recent version at time of writing (21.1.1.40), the process illustrated should work for updating FMS from ANY version prior of 19.x, 20.x or 21.x, and possibly later versions.
- Please take special note of the system requirements.
- You will need local administrative privileges in order to complete this process.
- You should close all programs and save your work prior to proceeding.



6-in-1 Estate Administration Software FileMaker Platform – Windows Server FMS v21.1.1.40 | FMP v20.3.2.201 Revised 2/9/2025

- This installation often requires restarting the server at least once, but sometimes more than once.
- **FMS / Admin Console credentials**: There are several references to credentials required for the FMS admin console in these instructions. These are used in the web-based admin console as well as at the command prompt when executing commands. Default credentials set by this installer are as follows:

Username: lackner Password: lackner (all lower-case)

3) INTRO Part 3: System Requirements

If you have successfully installed FileMaker 19 Server on this machine, you may be within the required specifications already. Briefly, Windows Server 2019 and 2022 (Standard and Datacenter editions) are the officially supported Windows operating systems. However, specifics about the technical specifications and requirements are available here: <u>Claris FileMaker 2024 Technical Specifications</u>

If you have any questions about your particular environment, please feel free to reach out to support by clicking <u>here</u>.

4) Download the latest version

a. **Download the latest installation package** from the following page: <u>https://support.lacknergroup.com/Products/6-in-1/Downloads</u>



6-in-1 Estate Administration Software

FileMaker Platform – Windows Server FMS v21.1.1.40 | FMP v20.3.2.201 Revised 2/9/2025



b. **Open the self-extracting archive** by right-clicking on the package and selecting Run as administrator from the contextual menu.



c. If prompted by User Access Control (UAC), press Yes.



6-in-1 Estate Administration Software FileMaker Platform – Windows Server FMS v21.1.1.40 | FMP v20.3.2.201 Revised 2/9/2025

User Account Control Do you want to allow th changes to your device	× nis app to make ?
FileMaker Server 21 Installation Package Verified publisher The Lackner G File origin: Hard Trive on this con Show more det	(2024) for 6-in-1 - e for Windows roup, Inc. nputer
Yes	No

d. Enter the password, showtime when prompted, and press Next.

Password Protection				
The package is password protected. Plea	ase provide the correct password to continue or press Cancel to exit.			
Please enter the password into the following field to continue:				
The package is password protected. Please provide the correct password to continue or press Cancel to exit. Please enter the password into the following field to continue:				
The package is password protected. Please provide the correct password to continue or press Cancel to exit. Please enter the password into the following field to continue:				
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e. When extraction is complete, the extracted folder will automatically be opened and will display as presented in the figure below. Note that a copy of the latest version of these instructions is included at the root of the folder.



5) Verify Cache Settings



6-in-1 Estate Administration Software FileMaker Platform – Windows Server FMS v21.1.1.40 | FMP v20.3.2.201 Revised 2/9/2025

The cache settings for your FileMaker Server installation may have been adjusted from the default 512MB. Having this optimized can greatly improve the overall performance of your server. The update process usually persists these settings, but it's good to double-check, and even adjust if your hardware (memory) configuration has changed.

- a. Open the command prompt.
- b. Enter a command to check the cache size:

fmsadmin get serverconfig cachesize

c. **Enter FMS credentials** when prompted. See the Notes & Warnings section on the first page of this document for details about FMS credentials. In this example, the cache size remains at the default 512MB.



NOTE: We recommend using as much cache as your system configuration can afford. There are instructions for adjusting this setting at Step 8, after the installation of the update.

d. You can close the command prompt now.

6) Disconnect Users and Close Databases

The installer will stop the FileMaker Server service during installation and restart it upon completion. Before continuing, it's best practice to make sure all users are out of the system, and then close all databases.

a. Log into the admin console by opening your browser and navigating to http://localhost:16001. As mentioned earlier, see the Notes & Warnings



6-in-1 Estate Administration Software FileMaker Platform – Windows Server FMS v21.1.1.40 | FMP v20.3.2.201 Revised 2/9/2025

section on the first page of this document for details about FMS credentials.



- b. Upon login, note your current version (see screenshot in the next step).
- c. Check if any users are still connected as indicated by the Total Connections value on the top left. If there are, continue, otherwise skip to Step 7. Note that in our example, the console is showing that there is one user still in the system.

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6-in-1 Estate Administration Software FileMaker Platform – Windows Server FMS v21.1.1.40 | FMP v20.3.2.201 Revised 2/9/2025

d. To **disconnect any remaining users**, navigate to the Databases tab, select All Databases, select all of the Users in the resulting user list, and then click Disconnect.

Claris FileMaker Server Admin	.c₀ × +				
\leftarrow C (i) localhost:1600	1/admin-console/app/activitie	25		P A	
Claris FileMaker Server				Tuesday, July 18, 2	023 at 15:16 SERVER
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Search 'Databases' ta	Sort by Filename ~	Disconnect Send	Message		Search
All Databases (123)	2) Select 'All Databases'	User Name	Databases	Host Name / IP Address	Sign-in
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6-in-1 Estate Administration Software FileMaker Platform – Windows Server FMS v21.1.1.40 | FMP v20.3.2.201 Revised 2/9/2025

e. In the resulting dialog, write a message to the connected users and then press OK. By default, they'll be given 2 minutes before they're automatically disconnected.

Enter the message to se	end to FileMaker clients.	
Please close FileMake approximately 30 minu	r / 6-in-1 while we update the tes	e system. It should be back online in
approximatory of this		
L		Write a thoughtful massage
Delay Time (minutes)		and then press OK.
2		

f. Any connected users will see something that looks like this:





6-in-1 Estate Administration Software FileMaker Platform – Windows Server FMS v21.1.1.40 | FMP v20.3.2.201 Revised 2/9/2025

g. Now, close all databases: From within the same Databases tab, open the dropdown options button on the right side of the All Databases header, and select Close All.



h. Finally... while not required, we typically **close the admin console browser** once we have confirmed that all users are disconnected, and all databases are closed. This is simply to avoid any confusion when the service goes off-line.

7) Start the installer

- a. **Navigate to the** FileMaker Server 21.1.1 folder nested inside the newly extracted folder.
- b. Start the installer by right-clicking on Setup.exe, and choose Run as administrator. You may be prompted to allow changes on this device. Please press Yes.



6-in-1 Estate Administration Software

FileMaker Platform – Windows Server FMS v21.1.1.40 | FMP v20.3.2.201 Revised 2/9/2025

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Estate19	1036.	mst	10/2/2024 3:4
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Desktop	🛃 FileM	aker Server 21.msi	10/2/2024 3:4
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c. When prompted to choose a language, please **choose English**. Press OK. You may see a progress bar related to the installation of IIS.



d. The installer may need to update the Microsoft Application Request Routing. If so, **you may be prompted to restart your server**. Press Yes.



NOTE: When this happens, you may be required to restart the Setup.exe after your server reboots. If so, please go back to the beginning of Step 7 above.



6-in-1 Estate Administration Software FileMaker Platform – Windows Server FMS v21.1.1.40 | FMP v20.3.2.201 Revised 2/9/2025

e. If the **FileMaker Server service** is still running, you'll be prompted to allow the installer to shut it down. Pressing No will cancel the installation. Press Yes. You'll see a progress bar while the service is shut down.

FileMaker Server 21	×	FileMaker Server 21	×
The FileMaker Server service is still running. The service must stopped before the installation can occur. Click "Yes" to stop t FileMaker Server service right now, or "No" to quit the installation.	be he	The FileMaker Server installer is attempting to stop the FileMaker Server service on Local Computer	
Yes No		Cancel	

NOTE: This can sometimes take a minute or two. In the unlikely event that it fails, please manually stop the "FileMaker Server" service, and try again.

f. Next, you may get a prompt to install the latest of Bonjour. We recommend pressing Yes.



g. Step through the Bonjour installer. There four screens from the introduction to the license agreement, about info, and final step.





6-in-1 Estate Administration Software FileMaker Platform – Windows Server FMS v21.1.1.40 | FMP v20.3.2.201 Revised 2/9/2025



h. Next, you'll be presented with the **installation wizard**. It may take a minute or to before the Next button is enabled while it migrates feature states from the prior installation. Press Next.



i. You'll then be asked to **accept the license agreement**. Choose I accept and then press Next to proceed.

1			_
License Agreement		2)	
Please read the following license ag	preement carefully.	\smile	
CLARIS FILEMAKER SERV	ER SOFTWAR	E LICENSE	,
IMPORTANT READ CARE	EFULLY: BY IN	STALLING, O	COPYING,
DOWNLOADING, ACCESSING	G OR OTHERW	ISE USING TI	HE
SOFTWARE, YOU AGREE TO	BE BOUND BY	THE TERMS	S OF THIS
LICENSE. IF YOU DO NOT AG	GREE TO THE 1	TERMS OF TH	IIS
LICENSE, DO NOT INSTALL,	ACCESS OR US	SE THE SOFT	WARE,
AND IMMEDIATELY DESTRO	OY ANY COPIE	S OF THE SC	FTWARE.
IF YOU LICENSED THIS SOFT	TWARE UNDER	A CLARIS	OLUME '
I accept the terms in the license agree	eement		
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j. Sometimes there is a pause while the installer waits for ports to close. This can take up to several minutes. Just **wait for it to finish** and continue.



k. Now you're ready to install. Click Install to continue.

FileMaker Server 21 Setup × Ready to Install the Program 3 The wizard is ready to begin installation. 2	FileMaker Server 21 Setup – — — × Installing FileMaker Server 21 The program features you selected are being installed.
Click Install to begin the installation. If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.	Please wait while the Setup Wizard installs FileMaker Server 21. This may take several minutes. Status: Validating install
< Back Install Cancel	< <u>B</u> ack <u>N</u> ext > Cancel

NOTE: This step will take several minutes to complete.

 When the installation finishes, you'll be prompted to restart the server. While it's ok to do so at this point, we find that it avoids some confusion if you choose not to at this time. Press No to continue.





6-in-1 Estate Administration Software FileMaker Platform – Windows Server FMS v21.1.1.40 | FMP v20.3.2.201 Revised 2/9/2025

m. At last, you're on the last page of the installation wizard. We recommend you <u>UN-check</u> Launch FileMaker Server Admin Console at this time, then press Finish.

🖟 FileMaker Server 21 Setup		\times
	The Setup Wizard is complete	
Un-check	The Setup Wizard successfully installed FileMaker Server 21.	
	Launch FileMaker Server Admin Console	
	< Back Finish Cancel	

n. Finally, please restart your server and continue with the next step.



6-in-1 Estate Administration Software FileMaker Platform – Windows Server FMS v21.1.1.40 | FMP v20.3.2.201 Revised 2/9/2025

8) Verify Service: Automatic startup type

After your server has restarted, please check the services to make sure that FileMaker Server is configured to start Automatically.

a. **Open Services Panel**: You can quickly open the services panel by searching for 'services' in the start menu:



b. **Verify automatic startup type**: With the services panel open, double-click on 'FileMaker Server' and verify that the 'Startup type' is set to 'Automatic'.

		L			
• • • 🗖 🖾 🖸	3 🗟 🖬 🖬	FileMaker Server Properties (Local Computer) ×			
Services (Local)	 Service 				
	FileMaker Se	General Log On Recovery Dependencies	Status	Startup Type	Log ^
		Sanica nama: FlaMaker Saniar	Rupping	Automatic	Loc
	Stop the serv			Manual	Loc
	Restart the se	Display name: Hie Maker Server		Manual (Trig	Loc
		Description: Manages FileMaker Server components.		Manual (Trig	Loc
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	Manages File	Path to executable:	Running	Automatic (T	Loc
	components	"C:\Program Files\FileMaker\FileMaker Server\Database Server\fmshelper.		Manual (Trig	Loc
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		Startup type: Automatic V		Manual (Trig	Loc
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		Service status: Running		Manual (Trig	Loc
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		otan otop rause resume		Manual (Trig	Loc
		You can specify the start parameters that apply when you start the service		Manual (Trig	Loc
		from here.		Manual (Trig	Loc
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		OK Cancel Apply	Running	Manual (Trig	Net
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c. **Start the service**: The service should have already started, but if, for any reason, it hasn't, start it now, then close the services dialogs.



6-in-1 Estate Administration Software FileMaker Platform – Windows Server FMS v21.1.1.40 | FMP v20.3.2.201 Revised 2/9/2025

9) Verify Server Cache

Take note of any memory settings from Step 5c. If the settings have changed or you wish to modify the amount of memory that FMS can use, take these following steps.

- a. Open the command prompt.
- b. Optionally, enter a command to **change the cache size** to your desired size. Here are a few examples:

```
fmsadmin set serverconfig cachesize=1024
fmsadmin set serverconfig cachesize=2048
fmsadmin set serverconfig cachesize=4096
fmsadmin set serverconfig cachesize=8092
fmsadmin set serverconfig cachesize=12288
```

c. Note that you will be prompted for the FMS credentials (same as in prior steps):





6-in-1 Estate Administration Software FileMaker Platform – Windows Server FMS v21.1.1.40 | FMP v20.3.2.201 Revised 2/9/2025

10) Open the Admin Console and verify operation

a. Log into the admin console by opening your browser and navigating to http://localhost:16001. As mentioned earlier, see the Notes & Warnings section on the first page of this document for details about FMS credentials.

Recycle Bin	🐮 🗊 🔮 Claris FileMaker Server Admin Co: 🗙 🕂					-	0	×	
	C () localhost:16001/admin-console/signin	P	습 () {_1	œ	~		🤹 🛛	
Sing Liste & Tout So Class FileMaker S Databases	Launch the Admin Console by	Г .	The defa	ult cre	denti	als a	re:	Î	
	desktop, or by navigating to:		User	lame:	lac	kner			
	https://localhost:16001		Pass	vord:	lack	ner			
	Sign In							1	
	Password Help								
Claris International Inc. Acknowledgements Documentation Support Help									
	Copyright © 2019-2024 Clans international linc. Use of this product signifies your agreement to the End	<u>user L</u>	Icense Agreei	<u>ient (EUL</u>	<u>A)</u> .			Ţ	
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6-in-1 Estate Administration Software FileMaker Platform – Windows Server FMS v21.1.1.40 | FMP v20.3.2.201 Revised 2/9/2025

b. Once logged in, you should notice that your 6-in-1 data files are loading (this can take several minutes), and your server version number reflects the upgrade.
 Please note that if the license appears to be expired you can generally disregard this. It is typical for this to be slow in refreshing after our annual contract renews.



11) Notify 6-in-1 Users

Finally, once all databases are loaded, you're done! Please notify your 6-in-1 users that they are invited to log back into the system at their convenience.