



## Lackner’s 6-in-1 on the FileMaker 19 Platform

The following offers a technical overview for running Lackner’s 6-in-1 Estate and Trust Administration System on the FileMaker 19 Platform (Mac or Windows), and is a good place to start for IT professionals or anyone installing and maintaining the software.

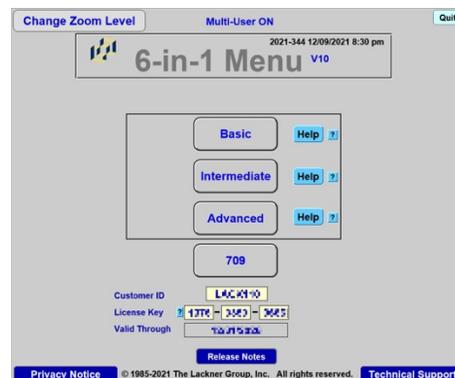
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## Overview

### Background

First developed in 1986, The **6-in-1 Estate and Trust Administration System** is a database program that works on macOS and Windows that allows you to enter data for the Estates and Trusts that you manage, along with beneficiary, accounting, inventory, and other related information that is then compiled to generate various governmental forms (to print or file electronically) including fiduciary tax returns, gift and death tax returns, probate, and more.



As our flag-ship product, 6-in-1 was originally developed in Lotus 123, then moved to DOS-based Q&A, and finally to FileMaker Pro way back in version 5.5. Built on the FileMaker 19 platform, 6-in-1 can be configured as a **Stand-Alone** application on an individual computer, or a **Hosted** (Multi-User, client/server) application where a centralized application server hosts the database files, granting simultaneous access to one or many clients (users/computers) on the same local area network.

If only one user needs access to 6-in-1, a Stand-Alone installation is often the best solution. However, if more than one person needs to share access to the 6-in-1 databases, a Hosted Client/Server is required.

### Installation Footprint

A typical installation of 6-in-1 has the following footprint:

- User Workstation(s):
  - FileMaker Pro 19 for 6-in-1, which installs the following required elements:
    - .NET Framework 4.8
    - Bonjour
    - Edge Runtime (Windows only)
    - VC x86 and x64 Redistributions



- 6-in-1 Extras: FileMaker Plugins, Licensing, and utilities.
- Fonts: Special fonts required for rendering some tax forms.
- pdfFactory Pro (Windows Only): An indispensable
- Estate19 Database Folder (Stand-Alone Only)
- Optionally, Server:
  - FileMaker Pro 19 for 6-in-1 Admin
    - The same as FMP on Workstation, but pdfFactory Pro is omitted.
  - FileMaker Server 19
    - IIS including Request Rerouting; Hosts FMS Admin Console via web browser
    - Bonjour
    - VC x86 and x64 Redistributions
  - Estate19 Database Folder

## FileMaker Platform

Claris' FileMaker Platform forms the foundation of 6-in-1, and is made up of two major parts:

- 1) FileMaker Pro 19 (FMP): The app/engine that is installed on a user's workstation which loads and runs 6-in-1 database files from the local file system (if Stand-Alone) or from a FileMaker Server (if Hosted, FMS, see #2 below).
- 2) FileMaker Server 19 (FMS): Optional; The hosting application server, which is usually installed on a dedicated server on the local area network. When implemented, FMS hosts 6-in-1 data files to which one or many FMP clients connect.

### FileMaker 19

All new customers get this version, and we began slowly rolling it out to our vast customer base as early as spring of 2020, working carefully to ensure backward compatibility with our FileMaker 11 version while we stage the transition forward. The user experience between the two versions is virtually identical, but performance is dramatically improved along with security and a whole framework of features that we're leveraging in an exciting, *Re-Imagined* release coming soon! We now have MANY of our clients running the FileMaker 19 based version of 6-in-1, and have begun aggressively working to update the rest of our customers with a goal to have the entire customer base migrated by the end of 2022.

### FileMaker 11

Tried and true, FileMaker 11 was the backbone of 6-in-1 for over a decade. Given the great number of changes including performance, modern security, and other benefits in 19, we



expect to designate the FileMaker 11 version as EOL (end of life) in the coming months, with final updates sometime in the spring of 2022.

## macOS and Windows Support

Because Claris supports both macOS and Windows, 6-in-1 does, too. macOS, however, has not supported FileMaker 11 for several versions now, so when you're on a Mac, 19 is assumed. Some clients got earlier versions using FileMaker 16, 17 or 18, which use the same .fmp12 file format. Mac and Windows installations cohabitate well on the same network: A Mac running FileMaker Pro 19 can connect to a FileMaker 19 Server hosted on Windows, and a Windows machine running FileMaker Pro 19 can connect to a FileMaker 19 Server hosted on a Mac.

## Backward and Forward Compatibility

Claris generally supports connection to versions of FileMaker that are two major version older or newer. For example, a workstation running FileMaker Pro 17 can connect to FileMaker 19 Server. Conversely, a workstation running FileMaker Pro 19 can connect to FileMaker Server 17.

## Networking

Anytime 6-in-1 needs multi-user access in any kind of scenario, FileMaker Server must be employed. The data files MUST reside on a local hard drive on the machine that is opening (FMP) or hosting (FMS) them. FMP or FMS must never be reading the data files from a mapped network drive. Stand-Alone configuration only supports a single user in a dedicated desktop environment. If installed on a terminal server (RDS, Citrix, or the like), only one profile should have access, although we generally recommend using FileMaker Server in that scenario.

## Data Files

The data entered into 6-in-1 lives in .fmp12 data files which are kept in an Estate19 folder (Estate10 for FileMaker 11) on your computer or server. That folder is installed at the following location by default:

OS	FM	Configuration	Default Live Data Path
Windows	19	Stand-Alone	C:\Estate19
	11		C:\Estate10
	19	Hosted	C:\Program Files\FileMaker\FileMaker Server\Data\Databases\Estate19



OS	FM	Configuration	Default Live Data Path
	11		C:\Program Files (x86)\FileMaker\FileMaker Server\Data\Databases\Estate10
macOS	19	Stand-Alone	/Users/Shared/Lackner Software/Estate19
	19	Hosted	/Library/FileMaker Server/Data/Databases/Estate19

The locations outlined above are simply the default locations. Upon installation, different folders can be configured as required by your administrator.

Because 6-in-1 is a database application, the **database files MUST be installed on a local hard-drive**, and NOT a shared network drive.

## Backup

We have some tools that make backing up data easier, it's important that you understand that not all configurations behave the same way. Most importantly, our backup tools simply make copies of the live database files and place them in a repository that you can then configure with your system's backup utility (whatever you use). YOU must configure your computer to back up the data files in that repository. See below for scenario-specific details.

### Stand-Alone

In Stand-Alone mode only, each time you close the 6-in-1 application you will be prompted to back up the database, much like QuickBooks and other accounting packages function. The first time this happens, you will be walked through a simple configuration wizard which asks you to specify where the backups should be stored (your backup repository). You should choose a location that you know is being backed up by your computer's nightly backup software or some other mechanism like DropBox, OneDrive, Google Drive, or iCloud Drive.

By default, the backup utility keeps the last 5 copies of your databases, purging older copies to conserve space. This can be modified during the original configuration wizard, or later in the settings at your discretion. If disk-space is a concern, you can configure the utility to compress the backups. This can be set upon initial setup, or by editing settings anytime thereafter.

FileMaker 11 versions of 6-in-1 have a similar mechanism, but only ONE COPY of your databases is maintained.



## Hosted

FileMaker Server automatically backs up your databases nightly, preserving the past 7 days of data. That schedule can be customized in the admin console. Your server's backup software should be configured to back up the repository, NOT the live data files.

The following table shows the various backup scenarios by configuration:

OS	FM	Type	Automatic	Default Backup Path
Windows	19	Stand-Alone	On Exit, makes a copy to a user designated folder. By default, keeps the last 5 backups, although this is user configurable.	* User Specified *
	11		On Exit, makes a copy to a user designated folder. Over-writes the last backup.	* User Specified *
	19	Hosted	Yes: Nightly backups for past 7 days	C:\Program Files\FileMaker\FileMaker Server\Data\Backups
	11		Yes: Nightly backups for past 7 days	C:\Program Files (x86)\FileMaker\FileMaker Server\Data\Backups
macOS	19	Stand-Alone	On Exit, makes a copy to a user designated folder. By default, keeps the last 5 backups, although this is user configurable.	* User Specified *
	19	Hosted	Yes: Nightly backups for past 7 days	/Library/FileMaker Server/Data/Backups

## Windows Registry & Mac Preferences

For Windows installations, the registry is used for two elements of a 6-in-1 installation:

1. FileMaker Pro and FileMaker Server both use the registry for settings.
2. The 6-in-1 installer and helper utilities save the location of the databases and other information about your configuration so that it knows where to find things for updates, backups (when applicable), and for launching 6-in-1. They also make some minor changes to the Claris/FileMaker part of the registry that manages favorites and some basic preferences.



## System Requirements

### Operating Systems

[Claris supports](#) the following operating systems with FileMaker Pro 19.4.2 (FMP):

- Windows 8.1 Standard and Pro Editions (64-bit only)
- Windows 10 Enterprise and Professional Editions (64-bit only)
- Windows 11 Enterprise and Professional Editions (64-bit only)
- macOS 10.15, 11.0, and 12.0.

[Claris supports](#) the following operating systems with FileMaker Server 19.4.2 (FMS):

- Windows Server 2019 Standard Edition (with Desktop Experience)
- Windows Server 2019 Datacenter (with Desktop Experience)\*  
\*Windows Server Datacenter is compatible with FileMaker Server 19, but has not been fully tested.
- Windows Server 2016 Standard Edition (with Desktop Experience)
- Windows Server 2016 Datacenter (with Desktop Experience)\*
- macOS Monterey 12.0 (FileMaker Server 19.4.1 minimum)
- macOS Big Sur 11.0 (FileMaker Server 19.1.2 minimum)
- macOS Catalina 10.15

### Hardware

Workstation minimum requirements:

- Intel i5 (Mac/Win) or Apple M1 (Mac)
- 8GB RAM
- 25GB SSD Hard-Drive Space for Application(s) & Database Files (Stand-Alone only)

Server minimum requirements:

- Dedicated server environment recommended
- 4-Core CPU
- 16GB RAM (8GB is acceptable in a dedicated environment for only 1 or 2 users)
- 25GB SSD Hard-Drive Space for Applications & Database Files

## Features & Benefits

To learn more about the functional side of 6-in-1 including features and benefits, please [our main website](#).