SECUREFM WITH MENUMAGIC
GETTING STARTED

The Demo Files

To familiarize yourself with the features of SecureFM, please go through the simple examples available from the main menu of the SecureFM Menu Editor.

Once you have oriented yourself, you will be able to easily use SecureFM's "Menu Editor" to customize FileMaker's menus.

Functions at a Glance

SecureFM with MenuMagic gives you a powerful toolbox of security, menu, and script-triggering functions.

Menu-Disable
This function is the heart of SecureFM, giving you the ability to disable entire menus or individual menu items, along with all associated keyboard commands. This function can even be used to completely remove menus.

Menu-Menubar
The Menubar function gives you the ability to hide FileMaker Pro's entire menu bar, disable all command keys, and disable all buttons in the window title bars (such as close window, maximize window, etc).

Menu-Toolbar
This function allows you to selectively toggle off and on FileMaker's toolbars, which include potentially dangerous functions such as Delete Record.

Menu-Statusbar
This allows you to hide the status bar that appears at the bottom of the FileMaker Pro application window on the Windows platform.

Menu-SetStartup
Set Startup will disable selected menu items as soon as FileMaker Pro is launched. It can also be used to automatically register SecureFM each time FileMaker Pro is opened.

Menu-Register

This function dynamically registers SecureFM and allows you at any point to verify that the plug-in is present and active. Registering with a password gives you even greater security in protecting your customized menus.

Menu-Version

The Menu-Version function returns the version number of SecureFM without any other text, making it easy to determine the version of SecureFM currently in use.

Menu-Rename

This function allows you to completely rename menus and menu items. With Menu-Rename, you can also define the Alt+ menu keyboard shortcuts available on the Windows platform.

Menu-Script

With Menu-Script, you can override FileMaker Pro's normal menu functions and, instead, call your own scripts when specific menu items are selected. Keyboard shortcuts, toolbar icons, and contextual menus will also dynamically execute your scripts. Used in combination with Menu-Rename, you can create highly customized menu environments for your solutions.

Menu-HotKey

The Menu-HotKey function gives you the ability to trigger a custom script through any keyboard command, such as Alt-E, Ctrl-I, Cmd-Shift-Z, etc. These hot key combinations can be completely independent of the keyboard commands normally associated with FileMaker Pro's menus.

Menu-Event

This multi-purpose function gives you the ability to trigger a script each time the active table occurrence changes, because of changing the file window or layout – without requiring you to carefully control file navigation through buttons and scripts. You can also use this function to run an error script if SecureFM has trouble locating a script specified by Menu-Script or Menu-Event. Additionally, Menu-Event can trigger a script whenever a user attempts to disable the SecureFM plug-in in the Application Preferences window.

Menu-PerformScript

Perform Script can be used to trigger a script in several different circumstances: when a user has modified a field's data, when a user navigates to a new layout, or whenever FileMaker attempts to recalculate a field. This function can be quite powerful.

Other important functions include: **Menu-StoreText**, **Menu-GetText**, **Menu-GetScriptCaller**, **Menu-GetMenuSelection**, **Menu-DoFMPMenuItem**, **Menu-ExtractParameter**, and **Menu-IsFrontWindow**.

For more details on any of these functions, see the SecureFM User Guide and explore the demo files included with the plug-in.

Menu Editor

The Menu Editor file helps you to easily create FileMaker menu definitions for use with SecureFM. It is not required, but it simplifies the process of creating the menu definition codes.

If you have used previous versions of the Menu Editor (originally called the "Configurator"), you will notice that the layouts look similar, but there are several new elements in tandem with the new MenuMagic functions.

Using the Menu Editor
- To create a new menu definition record, **click the "New" button**.
- Follow the simple instructions given by the Setup Wizard.

Navigating in the Menu Editor
In the main Menu Editor layout, click on the menu's folder tabs at the top of the screen to navigate to any menu you want to modify.

Disabling Menus and Menu Items
The Disable area with its numbered checkboxes is to the left of the menu item names. For this area to be available, you must have selected the "Disable" checkbox at the upper left.
- **Mark the checkbox of each menu item you want to disable** for the appropriate modes: Browse, Find, Layout, or Preview.

Renaming Menus and Menu Items
- For this area to be available, you must have selected the "Rename" checkbox at the upper left. **Select the mode** to which you want the rename changes to apply by using the radio buttons under "View". Making changes to item names when you are on the "Overview" view will cause the rename changes to apply to all modes.
- Click anywhere on the menu item names in the center of the layout (under "Rename"). On the edit palette that appears, **modify the names** of the menu and menu items to appear the way you want.
    - To restore the original FileMaker Pro name, clear all text from the field. When you return to the Menu Editor layout, the standard FileMaker menu name will be restored.
    - Note the visual feedback that you are given regarding which items have been renamed. A dark blue highlight means that the item has been renamed in all modes. A light blue highlight means that it has been renamed in one or more modes, but not all modes.

Setting Menu Items to Run Custom Scripts
- **Click on the Script column** to bring up the menu's edit palette (the same palette for renaming the menu).
- Click on the 'Retrieve Script from' field. Select the file containing the script you want from the list of open files. Click on the Update Scripts button.
- Click on the Script Names field next to the menu item you want to call a script. **Select the script** you want from the popup menu (or type it manually).
    - Alternately, you don't need to use the 'Retrieve Script from' field, but rather you can just double-click on the Script Names field and type the name manually. Be sure to spell the name correctly!
- Click the Close button.

Setting Hot Keys to Trigger Custom Scripts
- Click on the 'Special' tab. (If you do not see the Hot Keys table, make sure the Hot Keys checkbox is marked in the upper left of the Editor layout.)
- **Select Modifier Keys.** Modifier keys are non-text keys, such as Control or Alt, that modify the primary key. You can select zero, one, or a combination of two modifier keys.
- **Enter a Primary Key.** You can type a single, lower case text character or select from the popup list of special keys, such as the arrow keys, function keys, etc.
- Click on the 'Retrieve Script from' field. Select the file containing the script you want from the list of open files. Click on the Update Scripts button.
- Click on the Script Names field next to the primary key. **Select the script** you want from the popup menu (or type it manually).
    - Alternately, you don't need to use the 'Retrieve Script from' field, but rather you can just double-click on the Script Names field and type the name manually. Be sure to spell the name correctly!

Removing Toolbars
- Under the Toolbar tab, you can **remove Toolbars** by selecting "Disable" from the Standard Toolbar's popup menu under the Toolbar tab.

Creating and Testing the Menu Definition String
- When your menu modifications look correct in the Menu Editor, click the "**Create Strings**" button. This will calculate the menu definition strings to be used by SecureFM.
- You can immediately activate the menu definition by clicking the "**Apply Now**" button. **Navigate to files with the specified table occurrences to see your changes!** If you specify for the changes to be the Default <*>, or if you specify the "SecureFM Menu Editor" file, then your changes will be apparent without changing files. Otherwise you must go to one of the table occurrences that you specified in the "Apply to the following" list.

Modifying Menus from within Your Solutions

Once you have built your menu definitions, you can easily incorporate them into your own solution in one of three ways. The menu definition strings you've created can be…
- **Hardcoded into Set Field script steps** within your files.
- **Stored in fields** within your files and referenced by a Set Field Script step.
- **Stored in the SecureFM Menu Table file** and accessed by your files.

To modify menus from within a FileMaker Pro script:

- In your solution, create a new script.
- Create a Set Field script step.
- Go to the desired menu definition record in the SecureFM Menu Editor file and select the "View Strings" button at the lower left. **Make sure it says "Menu Definition String for <u>Scripts</u>"** in the header of the Strings Palette layout. If not, select the "View Script Strings" button at the upper right.
- Copy the string from the Strings Palette and paste it into the Set Field step's Specify... calculation.5.If you have created more than one menu definition string (for example, a Disable string, a Rename string, and a Script string), repeat the above steps, creating a new Set Field step for each string.

That's it!

Note that FileMaker Pro has a limit of 253 consecutive characters in a text string in a calculation, so the <u>script</u> strings are broken up into shorter text strings as necessary (in quotes) separated by ampersands "&".

To modify menus using strings stored in fields:

- In your solution, create a new **Text Field**.
    - Place the field on a layout so that you can put the string into the field. You may want to remove the field from the layout for security.
- Create a new script with a Set Field script step.
- In the Set Field step's Specify... calculation, type:
  External ("Menu-Disable", **Text Field**)
- Go to the desired menu definition record in the SecureFM Menu Editor file and select the "**View Strings**" button at the lower left. **Make sure it says "Menu Definition String for <u>Fields</u>"** in the header of the Strings Palette layout. If not, select the "View Field Strings" button at the upper right.
- Copy the string from the Strings Palette and paste it into the Text Field. Run the script!
- If you have created more than one menu definition string (for example, a Disable string, a Rename string, and a Script string), repeat the above steps, creating a new set field step for each menu definition.

That's it!

To modify menus using the SecureFM Menu Table file:

The SecureFM Menu Table file which is provided with SecureFM has no dependencies on other files. You can rename it and put it into your own solution. It is designed to be called whenever you need it and then closed. Most commonly, it is opened during a startup script; selected "menu definitions" are applied (stored in the plug-ins memory) by looping through a found set of records; and then the file is closed.

You may want to add some security features of your own to this file (passwords, etc.).

Because the SecureFM Menu Table stores all menu definitions in a central file, it is especially useful when you need to organize and manage different sets of menu definitions for your solution (different menus based on user group, etc.). The Menu Table is also helpful during the development process when you may be regularly testing and changing menu definitions for your solution.

To use the Menu Table file in your own solutions...

Menu Table Prep:
1. Make sure the Menu Table contains all the menu definitions you need for your solution, either transferred from the Menu Editor file or entered manually.
   - Go through the menu definitions stored in the Menu Editor file and click the "**Add to Table**" or "**Update Table**" button for each menu definition you want for your solution files, or go to the List in the Editor file and select the "**Add All to Table**" button.
2. Make sure the menu definitions have the necessary strings for all Platforms and versions of FileMaker Pro that your solution might run on.
   - It's a good idea to include menu definition strings for all versions of FileMaker Pro unless you can be sure which version of FileMaker your users will be using.
3. Assign a Category to each menu definition (if not already done in the Menu Editor). Since MenuMagic functions like Rename and Script do not work on Mac OS 9, it may be helpful to create separate menu definition records in the Menu Table and distinguishing them by values in the Category field.

Menu Table Security:
4. Set Access Privileges in the Menu Table file to prevent unauthorized access. Rename this file if you wish.
5. Set the Menu Table Preferences for your solution.
6. Place the Menu Table file on a secure server, if your solution will be running across a network.
7. For an additional level of security, we recommend that you add a script step in your own file to close the Menu Table file once it has modified FileMaker Pro's menus. (Don't add a "Close" step to a script in this file or it will halt the script which calls it.)

Creating a Relationship to the Menu Table:
This can be any sort of relationship since you will use it to set a value into a global field. For added security, the steps below show how to create a "non-matching" relationship which can be used to set global values only.

8. Create a calculation field that results in a number. Set the calculation equal to "0" (zero).
9. Create a relationship from your file to the Menu Table file, from your new calculation field to the SFM Constant field in the Menu Table file (which is equal to "1").

Using the Menu Table to Set Menus:
Whenever you want to modify menus, such as during file startup, your solution must first determine which category of menu definitions you want to activate. This can be based on any variable, such as user name, user group, etc.

10. Within a script in your file, set the category you want into the Menu Table file's **Category Find** field using the non-matching relationship (described above).
11. From your file, call the Menu Table's **'Set Menus'** script.

That's it! The script will find the appropriate records, and loop through them, storing the menu definitions in the plug-in's memory.

This can be a very efficient and modular way to deploy SecureFM.

Optional: Disabling Menus Automatically When Launching FileMaker
You can also set a disable menu definition automatically each time FileMaker is launched. This is useful when you cannot be assured that a given FileMaker file will be launched whenever a user opens FileMaker Pro, yet you want to disable certain functions universally.

-   You must first click the "**Apply Now**" button to activate a disable menu definition.
-   Click the "**Set Startup**" button.
-   The Set Startup function will store the currently active disable menu definition, though not Rename, Script, or other functions.

This creates a preference file, called SecureFM.ini, that is stored with the plug-in. The preference file stores the disable menu definition (not Rename or Script) that was active when you clicked the Set Startup button. It also stores your SecureFM registration, so the plug-in will be registered without needing to call the "Menu-Register" function. With SecureFM and the preference file in place, the disable menu definition will automatically be triggered every time FileMaker is launched. You can copy this SecureFM.ini file to each computer on your network or deliver it with FileMaker's auto-update feature.

Note that the SecureFM.ini file must be created once on each platform (Windows, OS X) on which you wish to use it.