

the
FileMaker[®]
Bento
Book

Beauty and Simplicity in Digital Organization



the Bento Book: Beauty and Simplicity in Digital Organization

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Introduction

Welcome to Bento...and Bento 2

The Database for the Rest of Us

Bento is a product from FileMaker, which is owned by Apple. Designed to bring FileMaker's database expertise to users of Mac OS X Leopard and later, it integrates data from iCal, Mail, and Address Book with databases that you can create from your own data as well as imported data from other sources.

Bento is lightweight in its structure but heavyweight in its capabilities. Because it builds on so many years' (actually decades') worth of experience with users and their needs both at FileMaker and at Apple, it is responsive to the frequently expressed needs and frustrations of people who need more organization than a word processing document or spreadsheet can provide but less complexity than a full-featured multiuser database might provide. Organization is the key to making information usable. Four items that are organized (ideas, recipes, addresses, bills, or shoes) can be more useful than a thousand items that are scattered around helter-skelter with no organization scheme.

Released in beta in the fall of 2007 and in a final version in early winter 2008, Bento caught on immediately. The response was positive both in reviews and in user comments. Because the Bento team is so agile and also because its design is so simple yet sophisticated, it was possible to produce a second version of the software within a year.

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- How This Book Is Organized 4
- Downloadable Files and Web Support 6

2 Introduction

This book shows you how to use Bento—both the first version and Bento 2. There are significant differences to the user interface between the two versions, but the basic functionality is the same. Figure IN.1 shows one of the sample Bento libraries in Bento 1.



Figure IN.1
Bento 1 in action.

In Figure IN.2, you see the same library in Bento 2.

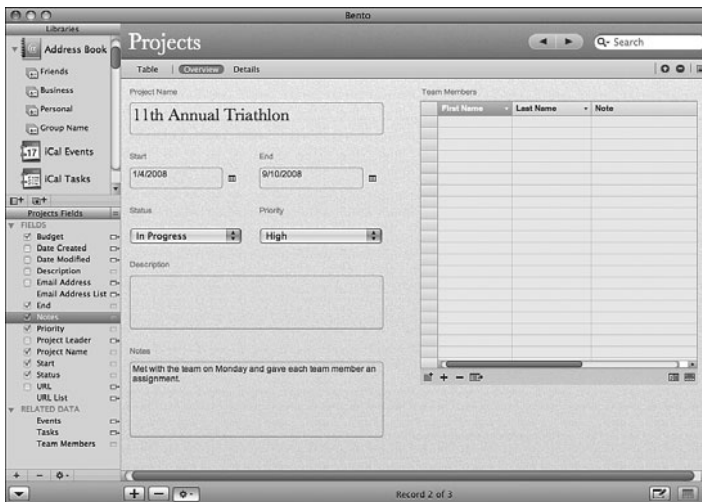



Figure IN.2
The library in Bento 2.

 The most significant difference that you can see in comparing the two versions is that the Source list (at the left in Bento 1) and the Fields list (at the right in Bento 1) now share the same Libraries & Fields pane at the left in Bento 2. There are many other changes. One of the most important is the ability to split the main part of the window into two views, as shown in Figure IN.3. Watch for the New in This Version icon in the book for more Bento 2 features.

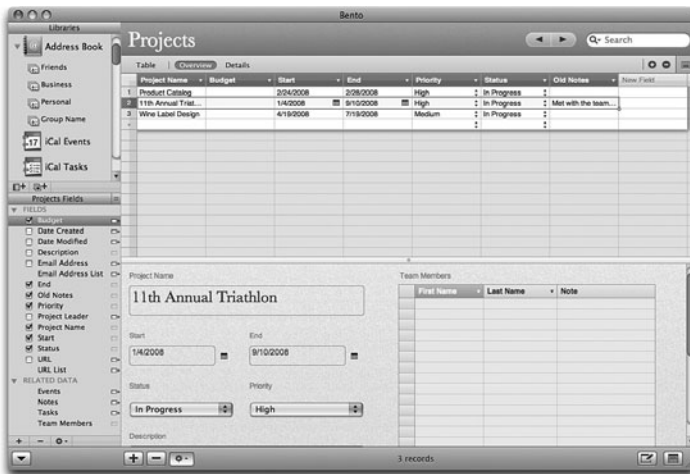


Figure IN.3

In Bento 2, you can split the window display in two.

There are many more changes in Bento 2. Just a few of the highlights are

- You can include messages from Apple Mail in your Bento libraries in the same way you can include iCal and Address Book data.
- You can enter data directly into the Table view, as shown at the top of Figure IN.3.
- Bento now supports more import and export formats.
- You can also save a Bento library as a template.
- Field types can be changed.
- Related records have more functionality, including the ability to click to go to a specific related record and, from that record, to return to the original record (“hot relations”).
- And many, many more features as you will see in the book.

If you are still using Bento 1, have no fear. Where differences exist in functionality or the interface, both are described and illustrated.

How This Book Is Organized

This book shows you how to use Bento, and it presents a number of projects that you can use (with or without modification). The projects are designed to illustrate the types of tasks that you can perform with Bento. You may choose to mix and match features and functionality from various projects to create your own solutions.

The general structure of the book is as follows:

- In the first few chapters, you see how to use the built-in Bento libraries.
- Next, you see how to customize them.
- Then you see how to import data from another source, such as a spreadsheet.
- Finally, you see how to create and share libraries for data that you enter from scratch.



Along the way, the chapters explore various combinations of these techniques. Here is a summary of the chapters in the book:

- Chapter 1, “Bento: The Database for the Rest of Us,” provides the introductory overview of Bento. It shows how you can organize your data, and it describes the basic Bento terminology, which consists of just four words. You see how to use the Bento window in both versions and how to set preferences.
- Chapter 2, “Using the Bento Window,” uses the built-in Notes library to show you how to add and delete records, enter data, and find it (both using a simple and advanced find technique).
- Chapter 3, “Working with Bento Forms,” uses the built-in Classes library to explore how you can customize libraries with themes, columns, labels, shading, text size, and text boxes.
- Chapter 4, “Building a Bento Library from Your Own Data,” provides a quick overview of how to import data from another source such as a spreadsheet. This topic is explored in more depth in Chapter 15, “Importing and Exporting Bento Data and Libraries.”
- Chapter 5, “Working with Phone, URL, IM, and Address Fields and Lists in Contacts,” explores the built-in Contacts library. You see how to use multiple forms and how to work with lists of phone numbers, URLs, addresses, emails, and IMs. The integration with Mail is explored both in Bento 1 and Bento 2 (there are some differences), and you see how to add fields to a form.
- Chapter 6, “Working with Bento Fields and Calculations,” shows how you can use calculation fields to make your data entry faster and more accurate. The built-in Exercise Log serves as the example.
- Chapter 7, “Expanding the Inventory Library with Related Records and Collections,” delves into the concept of related records. You see how to take the built-in Inventory library and modify it so that it reflects additions or subtractions to or from inventory in a live, on-hand value.
- Chapter 8, “Using Built-In Bento Libraries for Address Book,” explores one of the most powerful parts of Bento: its integration with Address Book in Mac OS X. Bento accesses the Address Book data, and it is always live in the Bento display as well as in the Address Book display. (You also see how this ties into MobileMe so that the data in Bento and Address Book is automatically synchronized with data elsewhere in your computing environment.)

- Chapter 9, “Using Built-In Bento Libraries for iCal Tasks and Events,” continues to look at how Bento is automatically integrated with your data on Mac OS X. This time, the iCal data is considered.
- Chapter 10, “Working with Bento’s Projects Library to Use Related Records from iCal Tasks, iCal Events, and Address Book,” shows how the built-in Bento Projects library uses the technologies described in Chapters 7 through 9. Related records from the built-in Mac OS X applications are associated with specific projects. This allows integration so that, for example, iCal can display tasks and events over a period of time and across many projects while you can view each project separately in Bento. Furthermore, the integration of iCal and Address Book with MobileMe means that your Bento tasks, events, and contacts are automatically available on all your synchronized devices from Macs to PCs to iPhones. This chapter also shows the new Bento 2 feature that lets you integrate messages from Mail with your Bento libraries.
- Chapter 11, “Designing a Projects Library with Related Notes,” shows how you can customize the built-in Projects library with structured notes. This capability allows you to enter and browse comment and note data by date or other categories. Notes differ from tasks and events not only in that they are stored totally in Bento, not in iCal, but also because notes are a record of what has happened and been discussed in a project—the past, as well as the future events and tasks. For many people, this library may be all the project tracking they need.
- Chapter 12, “Building a Garden/Nature Log,” builds a customized project from scratch. This project is good for a kid, class, or family. It integrates observations, measurements, and photos of a garden or natural world with Bento. It also shows how you can perform complex or tricky calculations with Bento’s summary row and Smart Collections (as in calculating the last frost date—a date that is characterized by the fact that you do not know the date of the last frost until all possible subsequent frosts have not happened).
- Chapter 13, “Organizing a Group Project with Bento,” shows how to use Bento as the core of a multiuser project. Bento is designed for a single user, but this is a great way for a person (teacher? project leader? committee chair?) to pull a group project together.
- Chapter 14, “Creating a Storyboard with Bento,” focuses on organizing a visual project and shows how you can keep track of all the related storyboard project aspects, such as locations, costumes, actors, and props. You can also integrate notes and visuals into the storyboard itself. Storyboard can help you organize everything from a political commercial to a family history.
- Chapter 15, “Importing and Exporting Bento Data and Libraries,” explores Bento data import and export. You also see how to use the Bento 2 features that allow you to create and use your own Bento library templates.
- Chapter 16, “Managing an Email List from Constant Contact or Vertical Response with Bento,” takes a common real-world problem and explores how you can use Bento to help you. Managing an email list is more than just tracking names and addresses. In this chapter you see the basics of importing and exporting addresses to and from the major bulk-mailing programs.
- Chapter 17, “Bento Quickies,” provides tips and suggestions for a number of projects. Because you have already seen how to use Bento, these quickies can point you in interesting directions in just a paragraph or two.

Special Features

This book includes the following special features:

- **Chapter roadmaps:** At the beginning of each chapter is a list of the top-level topics addressed in that chapter. This list enables you to quickly see the information the chapter contains.
- **Notes:** Notes provide additional commentary or explanation that doesn't fit neatly into the surrounding text. Notes give detailed explanations of how something works, alternative ways of performing a task, and other tidbits to get you on your way.
- **Tips:** This element gives you shortcuts, workarounds, and ways to avoid pitfalls.
- **Cautions:** Every once in a while there is something that can have serious repercussions if done incorrectly (or, rarely, if done at all). Cautions give you a heads-up.
-  **New in This Version icon:** This icon identifies new features in Bento 2.
-  **Cross-references:** Many topics are connected to other topics in various ways. Cross-references help you link related information together, no matter where that information appears in the book. When another section is related to one you are reading, a cross-reference directs you to a specific page in the book on which you can find the related information.

Downloadable Files and Web Support

For updates to the book, see the author's website, www.northcountryconsulting.com and the book's website, www.thebentobook.com. There is also a Facebook Page for the book at www.facebook.com/pages/The-Bento-Book/23722243212.

Downloadable files for this book are available on the Web:

- www.thebentobook.com.
- www.informit.com/title/9780789738127

FileMaker is the developer of Bento. There are a number of resources on the FileMaker site:

- www.filemaker.com/bento gets you to the basic Bento page.
- There is a discussion forum for Bento at <http://forums.filemaker.com/fmbnto/>.

3

Working with Bento Forms

Working with Forms

In Chapter 2, “Using the Bento Window,” you saw how to use the Fields list (Bento 1) or Libraries & Fields pane (Bento 2) to add fields. This chapter continues the discussion of fields and forms.

Every Bento library can be shown in a table view. At the top of the Bento window, you will see that for that library you can select either the table view or a form view. The table view is identified as “Table”; you can name the form views—and, yes, there can be more than one form view for a Bento library, but there can only be one table view.

This chapter begins by exploring the Classes template; its table view is shown in Figure 3.1. It contains a single record that is part of the template.

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- Customizing a Form with Themes 47
- Customizing a Form’s Fields 48

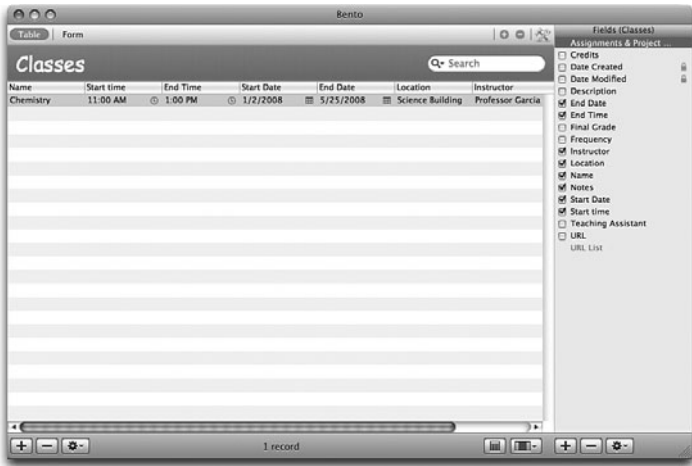


Figure 3.1
 Display the Classes template in table view in Bento 1.

The table view in Bento 2 is much the same as you can see in Figure 3.2. The biggest difference is that in Bento 1, the table view looks like iTunes, whereas in Bento 2, it looks more like a spreadsheet.



Figure 3.2
 Display the Classes template in table view in Bento 2.

The differences in functionality were described in Chapter 2. As far as the fields in the library that are shown in the table view, the difference is that the list is at the lower left in Bento 2 and at the right in Bento 1. In both cases, you select the fields to be shown in the table view by using the checkbox to the left of the field name. Because there is only one table view in a library, whether a field is displayed in that table view is an attribute of the field, and it can be set in the Fields list.

You can switch from table view to form view by clicking Form at the upper left of the Records area. The Classes form view is shown in Figure 3.3 as it appears in Bento 1.

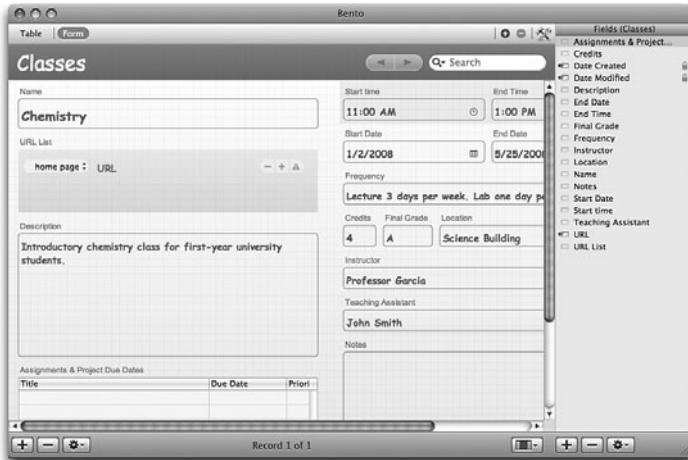


Figure 3.3

You can view the data in form view in Bento 1.

There are more differences between Bento 1 and Bento 2 when it comes to form views. Compare Figure 3.4, the Bento 2 version of the form, with Figure 3.3, the Bento 1 version.

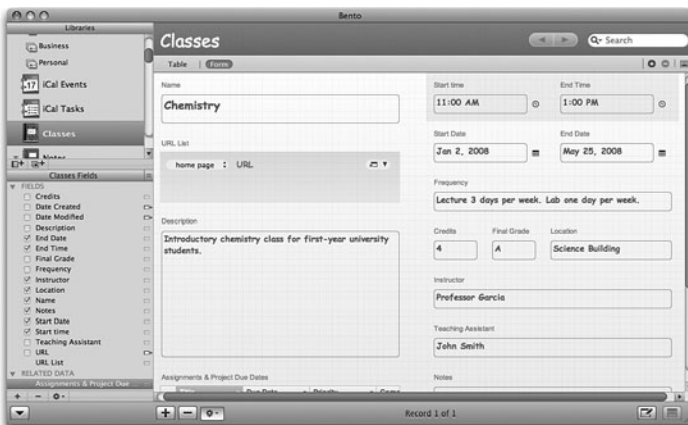


Figure 3.4

The Classes form view is shown in Bento 2.

First, note that in Bento 1, to the left of each field name is a small icon that indicates if that field can be dragged into the form. (The field is not already in the form because a field can only appear in a form once.) That icon appears in Bento 2 to the right of each field name. As you switch from one form

to another, the icons are updated in both Bento 1 and Bento 2 to reflect whether you can add the field to the form.

Note that in Bento 2, the Fields list makes a distinction between fields in the current library and those in related data. You can see this clearly in the Assignments & Projects field, a field that shows related records from iCal. In Bento 2, it clearly shows up as a related records field, whereas in Bento 1, it and any other related records fields are displayed alongside the library's fields.

In form view, you are able to rename a form, create new forms, and delete a form. (Except for the last one; there must always be at least one form in the library.)

To change a form's name, double-click its name to open the dialog shown in Figure 3.5. (This is the name of the form itself; it appears to the right of Table and among any other forms. To change the name of the library, click its name—Classes in this case.) You can also use Forms > Rename Form. Here, the form in the template is called Form. For this chapter, you are modifying that form. The safest way to do that is to rename it "Original Form" and then to duplicate it and work on the duplicate. Thus, Figure 3.5 shows you the first step in the process.

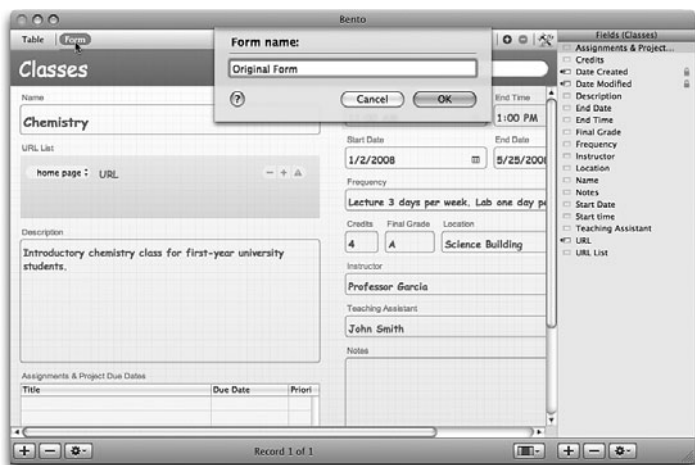


Figure 3.5
Rename a form.

The second step is to duplicate the form by choosing Insert > Duplicate Form in Bento 1 or Forms > Duplicate Form in Bento 2. Bento then duplicates the original form; its default name has "Copy" at the end. The next step is to rename the duplicate form from "Original Form Copy" to "My Form." Now you are ready to go.

Customizing a Form with Themes

Like Keynote with its styles, Bento lets you apply visual themes to your forms. These coordinated appearances combine a selection of colors and fonts in various styles. With a form selected, you can change its theme by choosing **Format > Theme**. Unlike Keynote, Bento does not allow you to change the details of the themes. However, because of the large number of provided themes, you are likely to find themes that you like.

A Bento theme is totally separate from your data. That means you can switch themes at any time without affecting your data. The various templates use a variety of themes, but you can change them at will.

If you want to be sophisticated about your Bento themes, you can select several of them to use for specific purposes, such as displaying confidential data from work, displaying social data, and the like.

Themes are applied to the active form; when you next go to a table view, that theme is applied to the table. If you then go to a form in the library that uses a different theme, that other theme is applied to the table view when you navigate from the second form to the table view.

With Bento 2, there are more than two dozen themes available. You can select a theme from **Forms > Choose Theme**. The first item in the submenu is **Theme Chooser**. It lets you select a theme and try it out. The Bento window behind the Theme Chooser dialog is visible using the new theme.

Some examples of Bento themes are shown in Figure 3.6.



Figure 3.6

Bento has a variety of themes.

Customizing a Form's Fields

To customize a library's table view, you use the Fields list (to control which fields are shown) and directly manipulate the table. You can reorder columns, show or hide the summary row, and change column width. In Bento 1, you modify a form view by choosing View > Customize Form or by clicking the customize form button at the upper right of the Records area. In either case, the search field is replaced by Customize Form with an X to its right. To exit from Customize Form, click that X.


 In Bento 2, you can customize a form by clicking on the edge of a field to move or change it. Figure 3.7 shows how you can access the customization options for a form. If you click in the field itself, you are able to enter data. Clicking on its border shows handles that you can use to resize the field, as shown in Figure 3.7. When the handles are visible, you can drag on the field's border to move it. If you click in the center of the field, the handles disappear, and you are able to enter data. This and the other interface elements described in this section replace the Customize Form mode in Bento 1.



Figure 3.7
Move and reshape fields in Bento 2.

When you start to customize a form in Bento 1, new tools appear at the bottom of the form view; in addition, guides appear on the form. Among the customization tools is a Themes tool that lets you select themes just as you can do by choosing Format > Themes. In Bento 2, a button in the lower-right corner of the window controls whether the form tools are shown or hidden as does View > Show Form Tools, as shown in Figure 3.7.

Bento puts the labels in the appropriate location and coordinates their appearance with the appearance of the relevant field using the currently selected theme. When you drag a field from the Fields list or Libraries & Fields pane into a form that you are editing, an outline of the label and data field appears as soon as you move your mouse into the Records area, as shown in Figure 3.8.

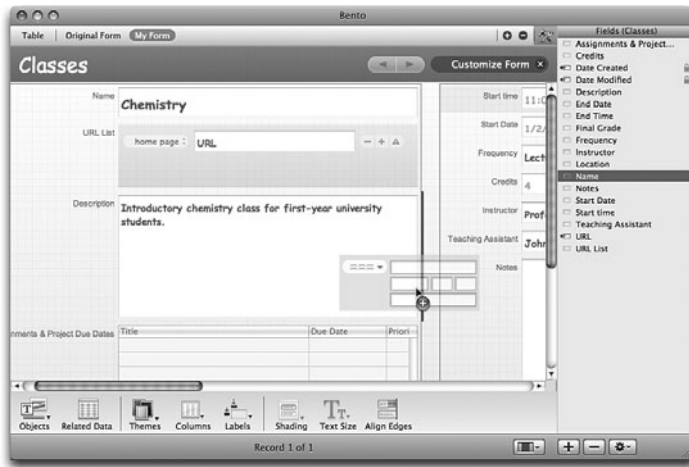


Figure 3.8

Bento automatically provides the label and data entry fields.

Some fields require more than one data entry element; if so, they are shown in the outline and are placed in the form as soon as you release the mouse button. A heavy line shows you where in the form the new field and label are placed. In Figure 3.8, a URL list is being placed on the form; it is one of the field types that require several elements for display and entry.



For more details about these composite data fields, see Chapter 5, "Working with Phone, URL, IM, and Address Fields and Lists in Contacts," p. 69.

After a field and its label have been placed on a form, you can change its width or height by selecting it and dragging the right or bottom border. You can also rearrange fields; just drag them up or down or from column to column. Everything is taken care of for you by Bento: fields move aside as needed. And, of course, the tab order remains logical (top to bottom and left to right in column one, and then on to column two with the same ordering). To rearrange fields after you have already added them, in Bento 1 you choose View > Customize Form, and in Bento 2, you click the border of a field to begin editing it.

Bento provides you with several formatting objects that you can add to a form. Figure 3.9 illustrates three of them.



Figure 3.9

Use form objects to help format a form.

The line beneath the two images is a *horizontal separator*. Another object, a *spacer*, has been added before the Date Created field. Also, a column separator has been added to the right of the column containing the images. Of these objects, only the horizontal separator is visible when you have finished editing the form (by clicking in another field or going to another form). Figure 3.10 shows the result. You can tell that a third column has been added to the form by the position of the horizontal scrollbar at the bottom of the form. In Figure 3.10, it has been moved so that the third column is visible.

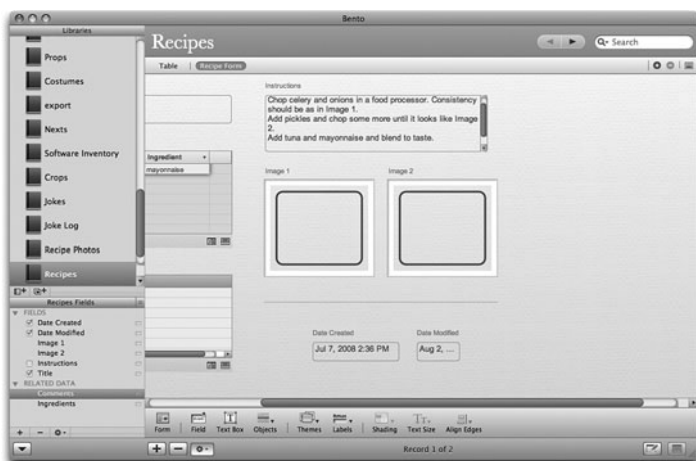


Figure 3.10

Only the horizontal rule is directly visible in the finished form.

The Form tools in Bento 1 and Bento 2 are mostly the same, but there are some differences. Table 3.1 describes each of the tools from left to right and provides keyboard equivalents. In the case of tools that are different in the two versions, that difference is noted. If no version difference is indicated, the tool works the same in both Bento 1 and Bento 2.

NOTE

Figures illustrating the use of the various tools are referenced in Table 3.1. Some of them occur in later chapters.

Table 3.1 Form Tools

Tool	Equivalent	Purpose	Version Differences
Form	Double-click form name in the navigation bar or Forms > Rename Form.	Change a form's name (Figure 3.5).	Bento 2
Field	Opens the Create a Field dialog	Open the Create a Field dialog (Figure 6.2).	Bento 2 In Bento 1, a choice in the Objects tool
Text Box	Insert > Text Box	You can type anything you want in the text box, and you can move it around the form just like a field. Unlike a field, this is not data from your library; it is simply text that appears on the form.	Bento 2 In Bento 1, a choice in the Objects tool
Objects	Insert > Horizontal Separator Insert > Column Divider Insert > Spacer	A spacer is a blank area that also can be moved around. You use it to add space between fields. There is also a horizontal separator (a line) that can be used to separate groups of fields.	See Field, Text Box, and Columns for Bento 1 differences
Related Data	Insert > Related Records List	Open the Create a Field dialog with Related Records List selected for Field Type.	Bento 1
Themes	Bento 1: Format > Theme Bento 2: Forms > Choose Theme	Select a theme.	Theme Chooser only available as the first choice in Bento 2

Continues...

Table 3.1 Form Tools (continued)

Tool	Equivalent	Purpose	Version Differences
Columns	Format > Columns	Choose 1-5 columns for the form.	Bento 1
Labels	Bento 1: Format > Labels Bento 2: Forms > Labels	Choose Above or Beside for position of labels on all fields in the form.	Bento 2: can also choose small, medium, and large size
Shading	Bento 1: Format > Shading Bento 2: Forms > Shading	Choose None, Light, or Dark for selected field(s).	
Text Size	Bento 1: Format > Text Size Bento 2: Forms > Text Size	Choose Smallest to Largest for selected field(s).	
Align Edges	Bento 2: Forms > Align Right Edges	Align right edges of selected objects. Other edges remain where they were.	

TIP

Be wary of going overboard with these design elements. If you find yourself needing to organize your forms with spacers and separators, maybe you would be better off splitting your form into two separate forms. As you see in Chapter 7, “Expanding the Inventory Library with Related Records and Collections,” you can use collections and related records to bring whole sets of data onto a form in a simple way. Bento works best for most people when you can see all the data elements in a form without scrolling the window.

The field consists of the label and the data entry section(s); a background may be shaded for the entire rectangle that contains these elements. In the Format menu or the tools at the bottom of the Customize Form view, you can choose the degree of shading you want. They can be effective in highlighting essential (or nonessential) information as long as you use shading consistently.

You can also change the size of the text in the data fields, although the size of the label text is changeable only in Bento 2. Finally, you can select two or more fields and align their right edges. You do this by expanding the narrower fields’ widths so that all are consistent.

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