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Using FileMaker® Bento

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Introduction

Welcome to Bento

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 iPhoto, iCal, Mail, and Address Book with databases that you can create from your own data as well as data imported 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. A few 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.

The Bento team did not rest on their laurels. They continued to work hard, incorporating new features as well as important advances elsewhere in Mac OS X and in the world of computing. Hard on the heels of Bento 2, the team released the Bento iPhone app (available for download from the iTunes App store). Together with Bento 2.5, which was a free upgrade, the Bento iPhone App lets you carry your Bento data around with you.

As the people at Apple worked on Snow Leopard (Mac OS X version 10.6), the Bento team worked to use new features to deepen the integration of Bento with the rest of the Mac environment. And in perhaps the most significant advance in Bento 3, it now is able to share data with up to five other computers on a local area network. Together with the Bento iPhone app and Apple's MobileMe service, this

can mean that your data is always at your fingertips no matter where you are and what device you are using. Then, in the Spring of 2010, the Bento team delivered the Bento iPad app providing yet another perspective on your Bento data.

How This Book Is Organized

This book shows you how to use Bento and 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 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 an 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 what you are looking for (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 14, “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 as well as 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, “Synchronizing with the Bento iPhone and iPad Apps,” shows you how to set up your iPhone and iPad and your Bento libraries for most effective synchronization.
- Chapter 9, “Sharing Data with Other Bento Users,” shows you how to configure Bento for use over a local area network.
- Chapter 10, “Using Built-In Bento Libraries for Address Book and iPhoto,” 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. The same interfaces and technologies that allow Address Book integration allow you to integrate Bento with your iPhoto library.
- Chapter 11, “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 12, “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, 10, and 11. 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 feature that lets you integrate messages from Mail with your Bento libraries.
- Chapter 13, “Designing a Projects Library to Share on Your LAN and Synchronize with Your iPhone,” 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 14, “Importing and Exporting Bento Data and Libraries,” explores Bento data import and export. You also see how to create and use your own Bento library templates.
- Chapter 15, “Using the Bento Template Exchange” shows you how to make the most of the shared templates available online and how you can contribute your own templates for others to use.

Using This Book

This book allows you to customize your own learning experience. The step-by-step instructions in the book give you a solid foundation in using FileMaker Bento, while rich and varied online content, including video tutorials and audio sidebars, provide the following:

- Demonstrations of step-by-step tasks covered in the book
- Additional tips or information on a topic
- Practical advice and suggestions
- Direction for more advanced tasks not covered in the book

Here’s a quick look at a few structural features designed to help you get the most out of this book.

NOTE


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.

TIP

This element gives you shortcuts, workarounds, and ways to avoid pitfalls.

CAUTION

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.

 **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.*



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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/>.

Working with Bento Forms

In this chapter you'll see how to display Bento data in forms as well as how to work with form tools and to customize forms with themes and fields.

Working with Forms

In Chapter 2, "Using the Bento Window," you saw how to use the Libraries & Fields pane to add fields. This chapter continues the discussion of fields and moves on to forms, which display the fields in a library.

 *Forms can show fields from related libraries as you will **see** in Chapter 7, "Expanding the Inventory Library with Related Data Fields and Collections," p. 107.*

Every Bento library can be shown in a table view, which Bento generates automatically.

In Bento 3, a grid view is also generated automatically for each library. As you saw in the previous chapter, you can modify the settings for the thumbnails shown in the view.

In addition to the table and grid view, you can create and modify any number of form views. Every library must have at least one form view. In most of the templates, it is called Form, but you can change the name.

This chapter begins by exploring the Classes library template; its table view is shown in Figure 3.1. It contains a single record that is part of the template. In this chapter, you see how you can customize a copy of that form so that you have both the original and your modified form.

You select the fields to be shown in a table view by using the checkbox to the left of the field name in the Fields pane, which is at the bottom of the Libraries & Fields pane at the left of the Bento window. 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 pane.

In the navigation bar at the top of the Bento window, you can switch to the grid view as shown in Figure 3.2.

The thumbnail in the grid view has been enlarged using the zoom control in the upper right area of the grid view. As you saw in the previous chapter, it can display a reduced-size image of a form or one or more of the images in a library.

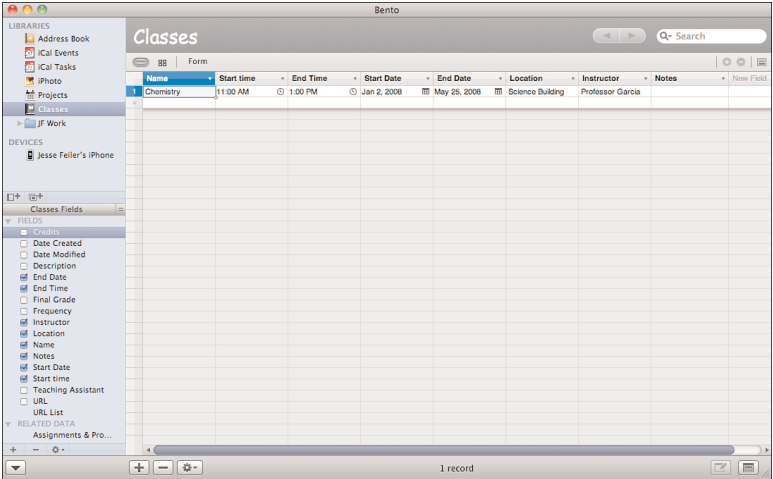


Figure 3.1 Display the Classes template in table view.

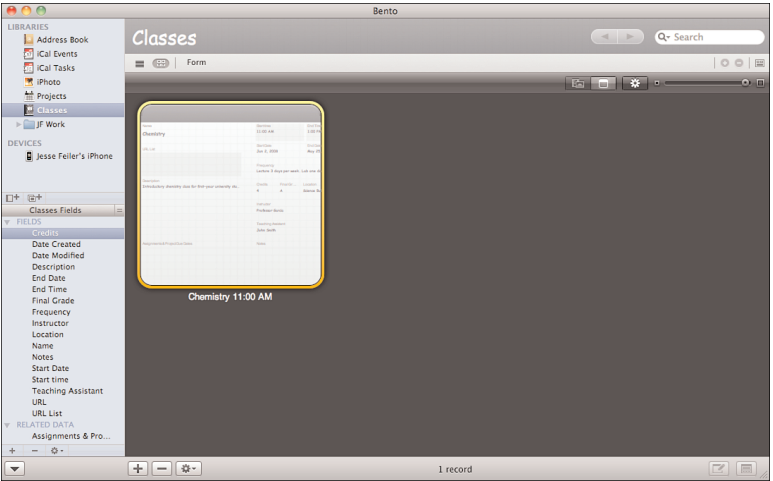


Figure 3.2 Use the Bento grid view.

In the navigation bar, the table and grid icons are always at the left. Moving to the right, you find a vertical dividing line and then one or more forms. In the Classes template, if you click the Form view you will see the form shown in Figure 3.3. This is a form view, and the default view is called Form in this and many templates. To be very precise, this is the Form form, but you do not have to worry about that technicality if it gives you a headache.

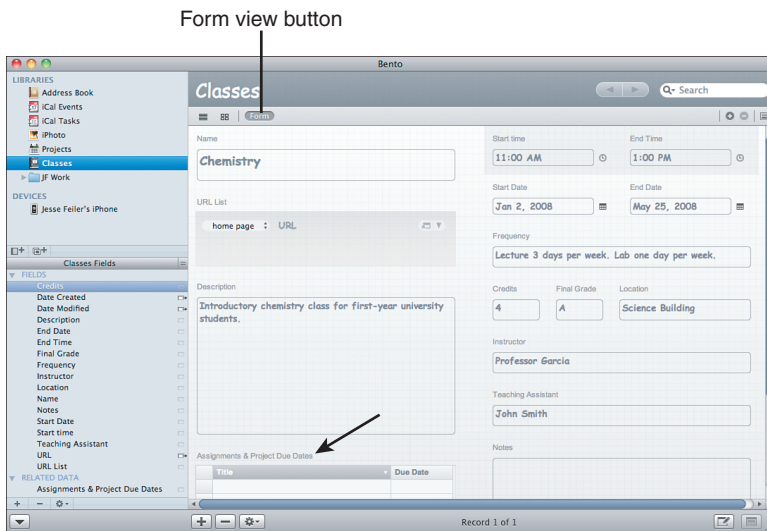


Figure 3.3 Use a form view.

The Fields pane makes a distinction between fields in the current library and those in related data. You can see this clearly in the Assignments & Projects Due Dates field, a field that shows related records from iCal. It shows up below the Fields section in a Related Data section, as you see in Figure 3.3.

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.) The form in the Classes 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.



LET ME TRY IT

Duplicate and Rename a Form

Duplicating and renaming a form is a good way to safeguard your existing form before making changes.

1. Change the existing form's name so that you can revert to it if necessary. To change a form's name, double-click its name in the navigation bar to open the dialog shown in Figure 3.4. Note that as you change the Form name, these changes are immediately reflected on the navigation bar.

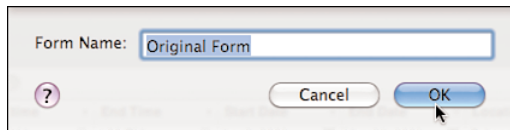


Figure 3.4 *Rename a form.*

2. You can also use Forms > Rename Form when you are viewing the form you want to rename.
3. Type in the new name: Original Form, in this case.
4. Create the duplicate by choosing Forms > Duplicate Form. Bento duplicates the form, with its default name "Copy" at the end.
5. Rename the duplicate form from "Original Form Copy" to "My Form" in the same way you renamed Form to Original Form. Now you are ready to go.



SHOW ME Media 3.1—A video about how to duplicate and rename a form

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Using Form Tools

You can customize a form in three ways. *Direct manipulation* lets you resize and move fields by showing their handles and then dragging the handles or the field to its new size and location. A selected form or fields within it can also be customized using menu commands. A button in the lower right corner of the Bento window lets you show the Form tools, as you can see in Figure 3.5. You have already seen how to use the Form tool at the left: It opens the dialog shown previously in

Figure 3.4 to rename the current form. You see how to use the other tools throughout this book. Most of them provide alternate access to menu commands (for which you frequently have other access through keyboard shortcuts). Instead of the button, you can use View > Show Form Tools to show the Form tools.



Figure 3.5 Show the Form tools.



TELL ME MORE Media 3.2—A discussion about how, when, and why to use form tools

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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 Forms > Theme Chooser. 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 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 go to a table or grid view, that theme is applied to the table or grid view. If you then go to another form in the library that uses a different theme, that other theme is applied to the table or grid view when you navigate from the second form to the table view.



LET ME TRY IT

Choose a Theme

There are more than two dozen themes available. You can choose them using the Themes form tool or the Theme Chooser.

1. Go to the form you want to theme.
2. To use the Theme form tool, show the Form tools and select the Themes tool as shown in Figure 3.6.

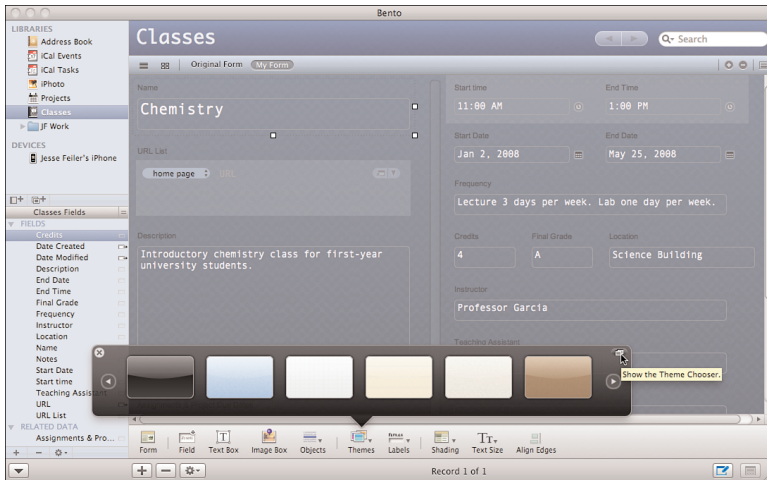


Figure 3.6 Use the Themes form tool and Theme browser to select a theme.

3. When you click it, you see the available themes in the small window that appears above the tools. (The downward pointing arrow in the Mac interface always means that another window will be opened rather than having a simple action performed.) You can select the theme you want to use and see it applied to your form as you watch.

4. Click the close box in the upper left corner to dismiss the themes.
5. You can also open the Theme Chooser dialog for the current form by using Forms > Theme Chooser as shown in Figure 3.7.



Figure 3.7 Use Theme Chooser to vary the look of your forms.

6. Select the theme you want to try. Click Try It to see it take effect in the window behind the Theme Chooser. You can resize the dialog somewhat so that you can see the effects while it is still open.
7. Click Choose to apply the theme and close the Theme Chooser.
8. If you do not want to change the theme, click Cancel to close the Theme Chooser with no changes.

TIP

If you are not very familiar with Bento's themes, make a note of the theme you are changing from so that you can change back to it easily without searching through all the themes to find out which one it was.



SHOW ME Media 3.3—A video about applying a new theme to a form

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Customizing a Form's Fields

To customize a library's table view, you use the Fields pane (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. You can customize a form by clicking its label to move or change it. If you click in the field itself, you are able to enter data. Clicking its label or border shows handles that you can use to resize the field, as shown in Figure 3.8. (Note the handles on the Name field; note, too, that the pointer has changed to a hand from the normal pointer when you are editing fields rather than their data.) 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.

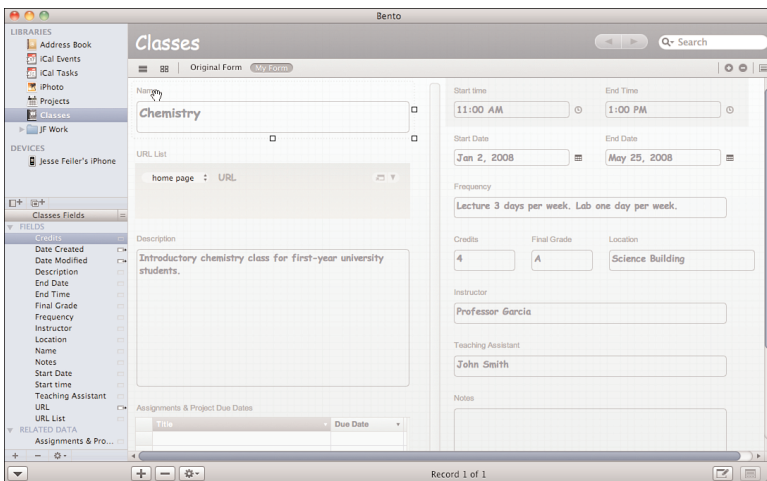


Figure 3.8 Move and reshape fields in Bento.

You can add fields to a form by simply dragging them from the Fields pane. 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 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 3.9. Note that a field can appear only once on a given form. It can appear on as many forms as you have, but only once on each.

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 3.9, a URL list is being placed on the form; it is one of the field types that require several elements for display and entry.

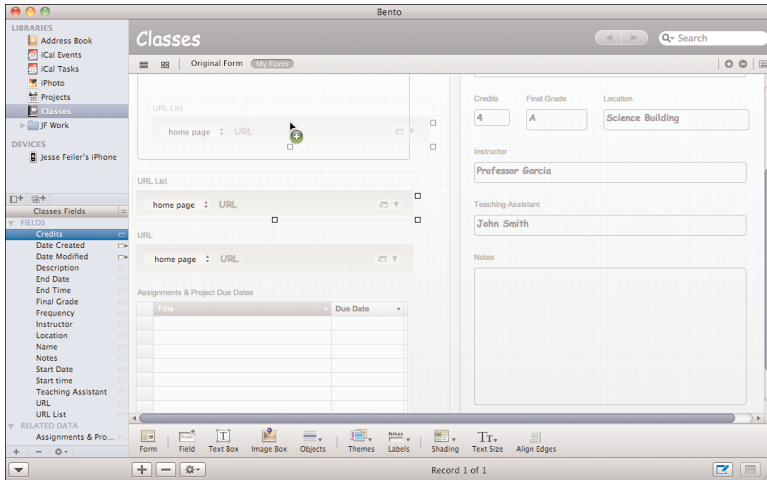


Figure 3.9 Bento automatically provides the label and data entry fields.

For more details about these composite data fields, **see** Chapter 5, “Working with Phone, URL, IM, and Address Fields and Lists in Contacts,” p. 77.

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. Bento takes care of everything for you—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, you click the label or border of a field to begin editing it.

Bento provides you with several formatting objects that you can add to a form using the Objects form tool pop-up menu. Figure 3.10 shows how you can add a *horizontal separator*—it is being placed just below the Description field.

A horizontal separator is visible in the finished form. Two other formatting objects are not visible except when you are editing the form. In Figure 3.11, you can see a column separator between the two columns. Although it is not visible after you have finished editing the form, it helps Bento keep the columns in line.

You can also add a *spacer*. As you can see, Bento positions fields in each column of a form starting at the left of each row. If you want to indent a field, add a spacer at the beginning of the row. It will not be visible, but it will have the effect of pushing

the fields in that row to the right. You can resize the spacer so that the fields look exactly the way you want them to. You can see a spacer placed in Figure 3.11. It pushes the field and label to the right (both field and label automatically move together).

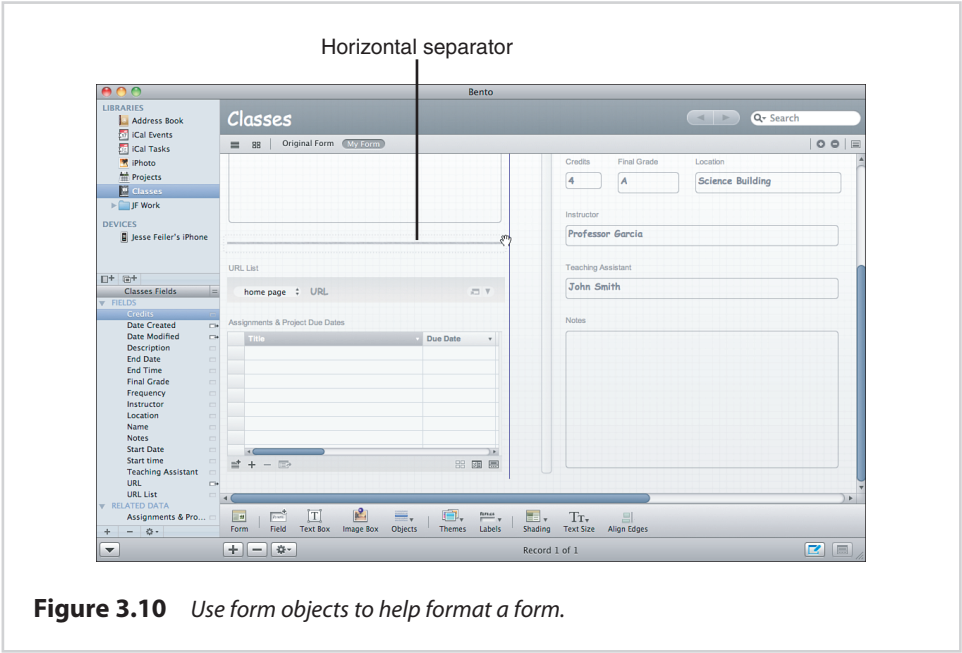


Figure 3.10 Use form objects to help format a form.

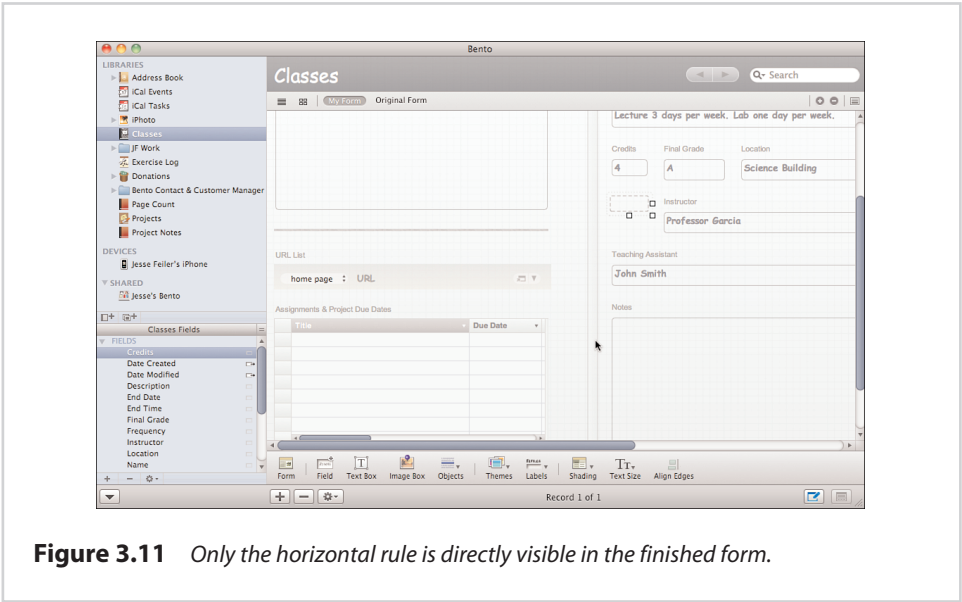


Figure 3.11 Only the horizontal rule is directly visible in the finished form.

Add these objects by using the Objects button in the Form tools or by using the appropriate commands in the Insert menu.

Table 3.1 describes each of the form tools from left to right and provides keyboard equivalents.

NOTE

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

Table 3.1 Form Tools

Tool	Equivalent	Purpose
Form	Double-click form name in the navigation bar or Forms > Rename Form.	Change a form's name (Figure 3.4)
Field	Opens the Create a Field dialog	Open the Create a Field dialog (Figure 6.2).
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.
Image Box	Insert > Image Box	Creates an image box. See Chapter 6.
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.
Themes	Forms > Choose Theme	Select a theme.
Labels	Forms > Labels	Choose Above or Beside as well as Small, Medium or Large.
Shading	Forms > Shading	Choose None, Light, or Dark for selected field(s).
Text Size	Forms > Text Size	Choose Smallest to Largest for selected field(s).
Align Edges	Forms > Align Right Edges	Align right edges of selected Align Right Edges objects. Other edges remain where they were. Note that this command is not available if the right edges are already aligned.

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 described 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 Form tools, 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, as well as the size of the label. 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.

**LET ME TRY IT**

Copy Forms within a Library

If you have a library with one or more collections within it, you can copy your forms to and from the library and each of its collections so that your design work can be reused. It also makes it easier to use the library and its collections if the forms are the same in each environment.

1. Start from a library that contains one or more collections or from a collection (it is always part of a library).
2. Navigate to the form you want to copy.
3. Control-click the form name in the navigation bar to bring up the shortcuts menu as shown in Figure 3.12.
4. Select where you want to copy the form to. Your choices will be the library itself and all of its collections except for the environment you are currently in.

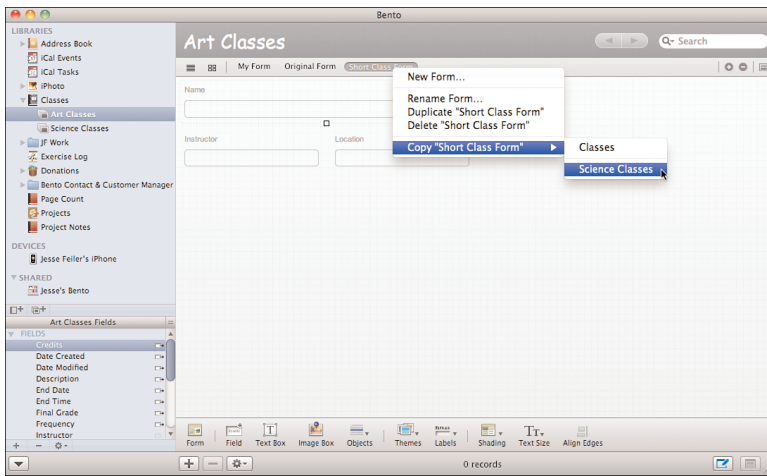


Figure 3.12 Copy a form with the shortcuts menu.



SHOW ME Media 3.4—A video about copying a form within a library

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