

FileMaker® Pro 13

ABSOLUTE BEGINNER'S GUIDE

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Tim Dietrich

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FileMaker® Pro 13

ABSOLUTE BEGINNER'S GUIDE



Tim Dietrich

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800 East 96th Street,
Indianapolis, Indiana 46240

FileMaker® Pro 13 Absolute Beginner's Guide

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About the Author

Tim Dietrich is an independent database professional who specializes in FileMaker Pro. He designs custom database solutions that help organizations solve problems and achieve goals. He also offers FileMaker training and coaching to groups and individuals, with courses designed for users at all skill levels. His clients range from small businesses to government agencies to Fortune 50 organizations.

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Dedication

I want to dedicate this book to my wife, Kelly, and my son, Alex. I could not have written this book without your inspiration, support, and patience. I love you both.

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And last but certainly not least, thanks to the talented team at FileMaker Inc. You never cease to amaze me with your innovative solutions and your ability to move the platform forward.

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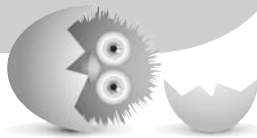
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- About This Book

INTRODUCTION



Welcome to the *Absolute Beginner's Guide to FileMaker Pro 13*. If you want to learn as much about FileMaker Pro as possible and as quickly as possible, this book is for you.

One of the nice things about FileMaker Pro is that it can provide you with a lot of power without overwhelming you with complexity. If you have even the most basic computer skills, but no prior experience in developing databases, you can quickly learn how to use FileMaker Pro to create databases that meet your specific needs. Best of all, you don't need to learn a programming language to do so.

But don't let FileMaker's ease-of-use fool you into thinking that it is a "lightweight" database. That couldn't be further from the truth. Many businesses, organizations, and educational institutions use FileMaker to manage complex and large databases, from inventory and sales contacts to historic records, and everything in between. FileMaker powers Web sites and provides mobile users with the information they need anytime, anywhere.

If you're new to FileMaker Pro, this combination of ease-of-use and power is good news, because it means that FileMaker Pro can handle your database needs now and as they evolve, and the time that you use to learn about FileMaker will be well spent.

About This Book

The approach for writing this book and presenting what you need to know is a little different from what you might see in some of the other database books available and different from the other FileMaker books and training materials available. The challenge in presenting the material in this book was determining where to start and the best order in which to present it.

The best way to learn about FileMaker Pro is to first make you the most knowledgeable FileMaker Pro user possible. When you have a good handle on how FileMaker Pro databases work, you can go to the next level to create your own databases and share them with other users.

The material is presented in four parts:

In **Part I, "Getting to Know FileMaker Pro,"** you learn what databases are, what they can be used for, and why FileMaker Pro is the ideal database program to use to create and work with them. You learn about the FileMaker Pro application environment and discover the main functions and the various ways to perform them. You also create your first database and learn to work with data and navigate around your database.

Part II, "Beyond the Basics," introduces advanced techniques that you can use to make changes to FileMaker databases. For example, you will learn how to add new fields (including fields based on calculation formulas and special "container" fields that you can use to store many different types of digital files), make changes to the database's interface, create reports and charts, and more.

Part III, "Caring for and Sharing a Database," details the ways you can protect your database and share it with other users (including those on mobile devices). You will also learn techniques for backing up your databases, and how to tell when you're at a point where you should consider hosting your database with FileMaker Server.

In **Part IV, “Building Your Own Database,”** you will learn how to design a database that meets your specific needs. You’ll first learn how to identify the tables, fields, and relationships that you will need in the database. And then, using the knowledge that you will have gained from the first three parts of the book, you will create your database from scratch.

Throughout the book, you find tips and tricks that I’ve discovered throughout 20+ years of using FileMaker Pro.

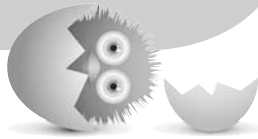
We have a lot to cover, so let’s get started!

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IN THIS CHAPTER

- Changing an Existing Record
- Adding a New Record
- Duplicating a Record
- Canceling Changes to a Record
- Moving Between Fields
- Moving Between Records
- Deleting a Record
- Deleting Multiple Records
- Moving Between Layouts
- Changing Layout Views

4



WORKING WITH RECORDS

In Chapter 3, “Exploring FileMaker Pro,” you became familiar with the FileMaker Pro application environment. You learned about the commands that FileMaker Pro provides and the various ways that you can access them.

In this chapter, you use what you learned to explore and work with the database you created. You change, add, and delete records; navigate through records and layouts; and much more. This chapter provides you a more thorough understanding of how to use a FileMaker Pro database.

Changing an Existing Record

When you created the Contacts database, FileMaker Pro automatically added the first record for you. With the exception of the First Name field, the record is empty. Let's change that record by entering data in the fields.

1. Click the Title field. A drop-down menu displays. Here, you can select a title. Select a value from the list. Notice that the field has a thin highlight around it. That's how you can tell which field you are in.
2. Click the First Name field. Enter your first name in the field.
3. Click the Last Name field and enter your last name.
4. Save the changes that you made to the record. In database terms, we refer to the act of saving changes to a record as *committing the changes*. To commit your changes, click anywhere in the content area of the window where a field or button isn't present.

Adding a New Record

Let's add a new record to the database. As you might have guessed, FileMaker Pro provides several ways to add records, including

- Click the New Record button in the Status Toolbar.
- Select the New Record command from the Records menu.
- Use a keyboard shortcut. On a Mac, the shortcut is Command+N, and in Windows, it is Ctrl+N.

After you choose one of the previous methods, a new record is created. Again, with the exception of the First Name field, the fields are blank. Click the fields to enter some values.

Duplicating a Record

In some cases, you might want to create a new record based on values from an existing record. This is called *duplicating* a record.

There are a couple of ways to duplicate a record:

- Select the Duplicate Record command from the Records menu.
- Use the keyboard shortcut. On a Mac, the shortcut is Command+D, and in Windows, it is Ctrl+D.

When duplicating a record, a new record is created with values from the original record. Of course, you can make changes to the duplicate record if you need to do so.

Canceling Changes to a Record

Suppose that you start to make changes to a record, and then realize that you don't want to make those changes after all. As long as you haven't committed the changes (by clicking outside a field in the content area of the screen), you can cancel (or undo) your changes.

To do so, select the Revert Record command from the Records menu. A dialog box displays (see Figure 4.1) and asks whether you really want to revert all changes to this record since it was last entered.



FIGURE 4.1

The dialog box that displays when you attempt to revert changes to a record.

Click the Revert button, and the record is set back to the values that it had when you started making changes to it.

If the Revert Record command is grayed out, this is an indication that the changes you made to the record have already been committed. Unfortunately, at that point there is no easy way to revert the record to its initial values.



TIP The Revert Record command also comes in handy when you start to create a new record and then change your mind. Instead of saving the new record, you can cancel it by selecting the Revert Record command.

Moving Between Fields

So far, when adding or changing values in fields, you have moved between the fields by clicking them. That works, but can be tedious. Fortunately, there is a much easier way to move between fields. In FileMaker Pro, the Tab key can be used to move from one field to the next. Similarly, you can use Shift+Tab to move to the previous field.

As you tab between fields on a layout, FileMaker usually determines which field to place you in based on the field to the right of the current field, or, if there is no field to the right, to the field below the current field. However, as you see in Chapter 11, “Working with Layouts,” you can specify the order in which fields are entered as you tab through them.

Moving Between Records

If you haven't already done so, create a few additional test records. We need them to demonstrate how to move between records.



TIP Remember that you can easily see the number of records in the table by looking at the Status Toolbar. The number that appears to the right of the pie chart indicates the number of records in the table.

In Chapter 3, “Exploring FileMaker Pro,” we discussed several components of the Status Toolbar that can be used to move between records. Let's use those to move between the test records you created.

First, let's use the book (the navigation control in the leftmost area of the Status Toolbar) to move between records. Simply click the left-hand page of the book to move to the previous record, and click the right-hand page to move to the next record.

Notice that as you move between records, the number of the record displayed changes in the Status Toolbar. As discussed in Chapter 3, that number is the current record's position within the set of records that you are working with. If you want to go directly to another record, simply enter a number into the current record field. For example, to go to the fourth record, enter the number 4 and press the Enter or Return key.

You can also navigate between records by using the slider control that appears below the current record number field. Click on it and drag it to move from one record to another. This can be helpful when browsing through a large set of records and trying to familiarize yourself with them.

Deleting a Record

So far, we added new records and made changes to existing records. Now let's delete a record.

To do so, first navigate to the record that you want to delete.



CAUTION Before deleting a record, always confirm that you really are on the record that you want to delete. Once a record has been deleted, there is no way to restore it.

Next, use the Delete Record command to start the process of deleting the record. To do so, use one of these methods:

- Click the Delete Record button in the Status Toolbar.
- Select the Delete Record command from the Records menu.
- Use a keyboard shortcut. On a Mac, the shortcut is Command+E. On Windows, it is Ctrl+E.

Before deleting a record, FileMaker Pro wants to be sure that you really do want to delete it. When you choose the Delete Record command, a dialog box displays (see Figure 4.2) and asks whether you want to permanently delete this entire record.

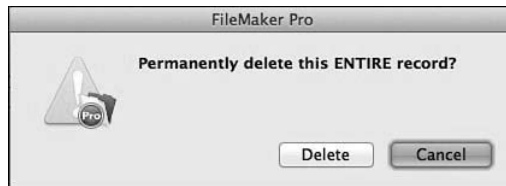


FIGURE 4.2

The dialog box that displays when you choose to delete a record.

If you are certain that you want to delete the record, click the Delete button. Otherwise, click Cancel, and no harm is done.

Deleting Multiple Records

FileMaker Pro also provides a command for deleting multiple records at one time. The command, located under the Records menu, displays differently depending on the current set of records that you are viewing.

If you are viewing all the records in the table, the command is listed as Delete All Records. Otherwise, it is listed as Delete Found Records.

If you select either of those commands, a dialog box displays and asks whether you really want to delete the records. The message in the dialog box also differs depending on the set of records being viewed. If you are about to delete all records in the table, the message reads, "Permanently delete ALL N records?"

(where N is the total number of records in the table; see Figure 4.3). Otherwise, it reads “Permanently delete ALL N records in the current found set?” (where N is the number of records in the found set).



FIGURE 4.3

The dialog box that displays when you choose to delete multiple records at the same time.

If you are certain that you want to delete the records, click the Delete All button. Otherwise, click Cancel.



CAUTION Deleting multiple records is a potentially dangerous thing to do. That is why there are no shortcuts for these commands. Always check to see that your current found set contains only the records that you want to delete, because there is no “undo” for this type of operation.

Moving Between Layouts

So far, all the changes made to the database have been done using the same layout. However, when you work with a FileMaker Pro database, you typically end up using multiple layouts so that you can view your data in alternative ways and work with data in other tables.

In FileMaker Pro, there are several ways to move between layouts.

- Click the Layout field in the Status Toolbar. A menu of available layouts displays from which you can select the layout that you want to move to.
- Use the Go to Layout command, located in the View menu.
- Click on a button that has been set up in the content area for moving to another layout. For example, in the Contacts database that we are working with, clicking the Contact List button (located in the top-left corner of the screen) takes you to the Desktop > Contacts layout.

Use one of the preceding methods to change to the Desktop > Contacts layout. This layout is designed to display the contact records in a list.

Changing Layout Views

In Chapter 3, I mentioned three different ways to view records on a layout: Form view, List view, and Table view. To change the view, click on one of the three view buttons in the Status Toolbar or select a command from the View menu.

The layout we are working with now displays multiple records at the same time. Therefore, this layout displays records in List view. The layout we were previously working with displayed only one record at a time. It was displaying records in Form view.

Experiment with the different view options, and notice how the appearance of the layout changes. On the current layout, displaying the records in Form view isn't much help to us. However, click the button to change to Table view, and you see that the records are now displayed as a spreadsheet-like table.

To experiment with views further, change back to the layout we were originally using (Desktop > Contact Details).



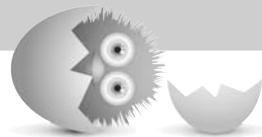
TIP The view that you want to use depends on the layout you are working with and what you want to do with the records. In cases where you need to make changes to a large number of records, it might be helpful to view the records as a table.

When you view a layout in Table view, some additional functions are available that you might not realize. For example, notice that the field names are used as the column headers. You can click on a column name to easily sort the records based on the values in that column. You can also hover over a column header, and an arrow appears to the right of the column name. Click on that arrow, and a menu of additional options is displayed.

THE ABSOLUTE MINIMUM

In this chapter, we continued to explore FileMaker Pro by working with records and navigating between layouts. Here are the key points to remember:

- There are several different ways to open a FileMaker database. You can choose it from a list of recent databases that you worked with. You can locate the database on your computer's hard drive. And you can choose from a list of your favorite databases.
- FileMaker Pro provides commands that make it easy to add new records and duplicate existing records.
- In FileMaker Pro, you move between fields either by clicking in them directly or by using the Tab key.
- Changes that you make to records are automatically saved when you click anywhere in the content area of the window (where a field or button isn't present).
- You can cancel any changes made to a record by using the Revert Record command under the Records menu. However, you can only do so if the changes that you want to undo have not already been committed.
- You can delete a single record or multiple records at one time. Regardless, you need be careful when deleting records, as there is no way to undo the deletion of records.
- You can view a database in many different ways either by changing the layout that you are working in or by changing the manner in which records appear in a layout.



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