SAND2008-3694C

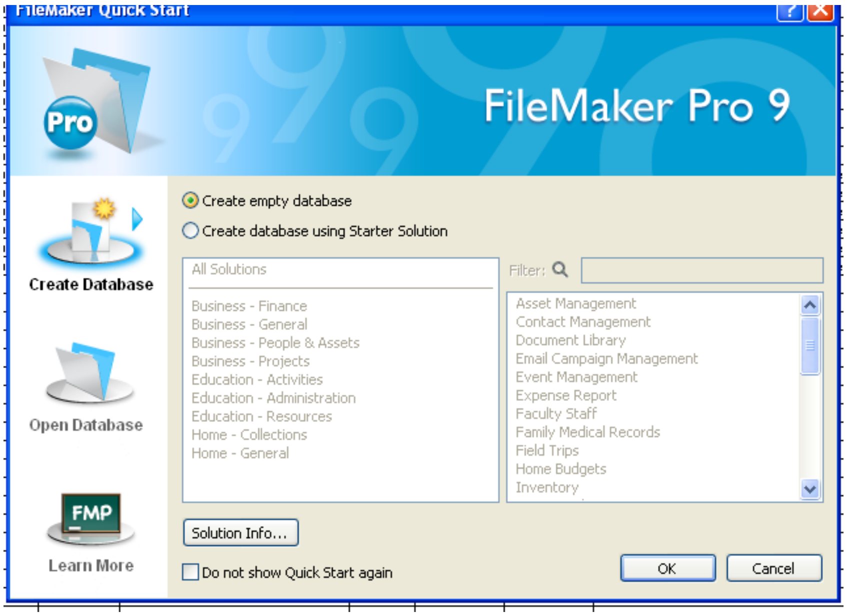
Introduction to FileMaker Pro

Learn how to build a Filemaker Pro database from scratch, how to add and modify fields and layouts, sort and browse data, and generate reports.

Outcomes

By the end of the training, you will be able to design and build a simple database and manage the CMC-A Database as well as:

- Creating a new database
    - Creating and changing fields
    - Printing
    - Creating a pdf
    - Creating value lists



FileMaker Quick Start

FileMaker Pro 9

● Create empty database
○ Create database using Starter Solution

All Solutions

Business - Finance
Business - General
Business - People & Assets
Business - Projects
Education - Activities
Education - Administration
Education - Resources
Home - Collections
Home - General

Filter:

Asset Management
Contact Management
Document Library
Email Campaign Management
Event Management
Expense Report
Faculty Staff
Family Medical Records
Field Trips
Home Budgets
Inventory

☐ Do not show Quick Start again

Notes____

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- Defining fields, and deciding which type is right for each kind of information
    - Changing field types
    - Using auto enter, validation and storage
    - Creating Buttons

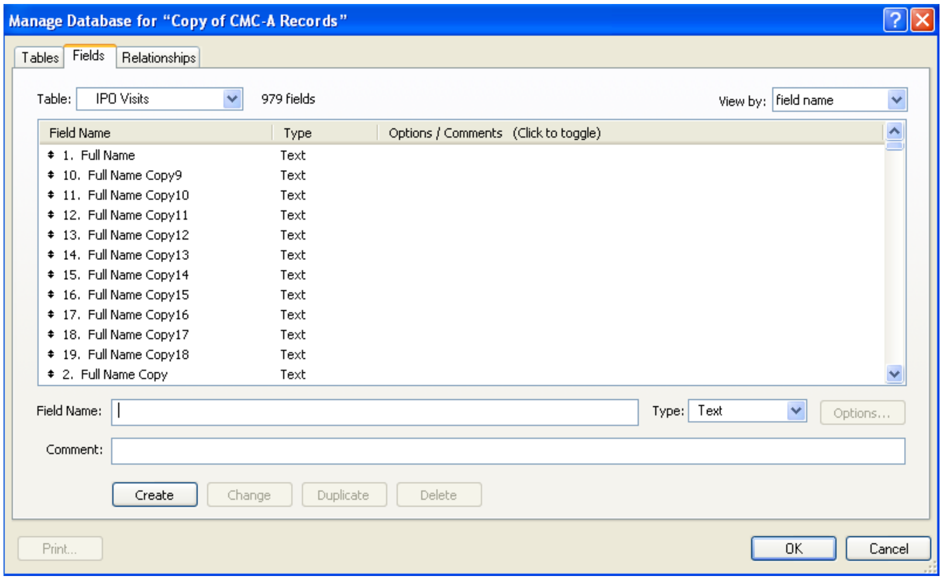

Manage Database for “Copy of CMC-A Records”
Tables
Fields
Relationships
Create
Change
Duplicate
Delete
Options…
Print…
OK
Cancel

Table: IPO Visits

979 fields

View by: field name

Field Name	Type	Options / Comments (Click to toggle)
1. Full Name	Text	
10. Full Name Copy9	Text	
11. Full Name Copy10	Text	
12. Full Name Copy11	Text	
13. Full Name Copy12	Text	
14. Full Name Copy13	Text	
15. Full Name Copy14	Text	
16. Full Name Copy15	Text	
17. Full Name Copy16	Text	
18. Full Name Copy17	Text	
19. Full Name Copy18	Text	
2. Full Name Copy	Text	

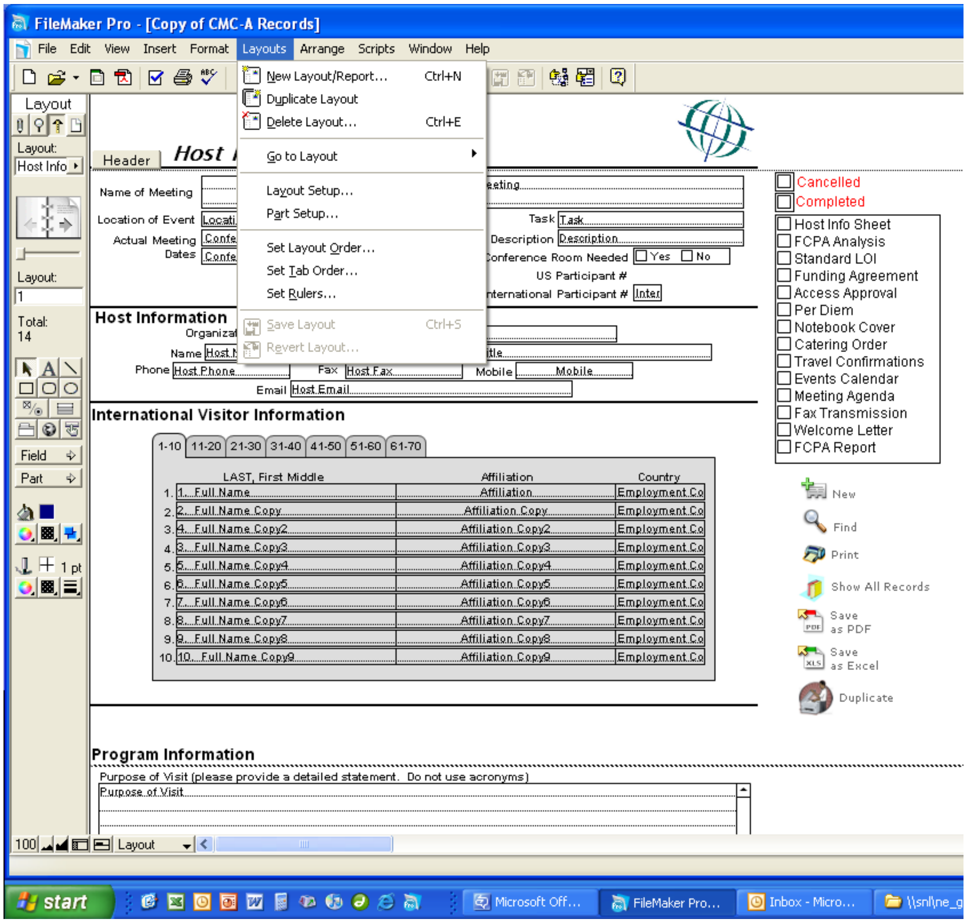
Field Name:

Type: Text

Comment:

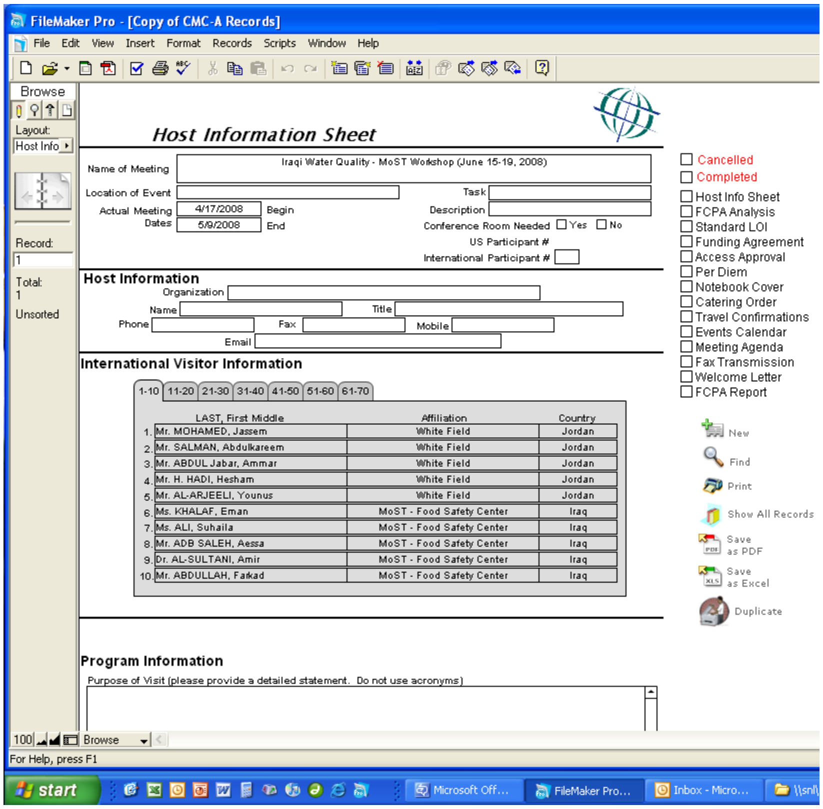
Notes____

- Building layouts for reviewing, editing, and reporting
  - Duplicating and deleting layouts


FileMaker Pro - [Copy of CMC-A Records]
File Edit View Insert Format Layouts Arrange Scripts Window Help
New Layout/Report… Ctrl+N
Duplicate Layout
Delete Layout… Ctrl+E
Go to Layout
Layout Setup…
Part Setup…
Set Layout Order…
Set Tab Order…
Set Rulers…
Save Layout Ctrl+S
Revert Layout…
Layout
Layout: Host Info
Layout: 1
Total: 14
Field
Part
Header
Host I
Name of Meeting
Location of Event
Actual Meeting Dates
Task
Description
Conference Room Needed ☐ Yes ☐ No
US Participant #
International Participant #
Host Information
Name
Phone
Fax
Mobile
Email
International Visitor Information
1-10 11-20 21-30 31-40 41-50 51-60 61-70
LAST, First Middle
Affiliation
Country
☐ Cancelled
☐ Completed
☐ Host Info Sheet
☐ FCPA Analysis
☐ Standard LOI
☐ Funding Agreement
☐ Access Approval
☐ Per Diem
☐ Notebook Cover
☐ Catering Order
☐ Travel Confirmations
☐ Events Calendar
☐ Meeting Agenda
☐ Fax Transmission
☐ Welcome Letter
☐ FCPA Report
New
Find
Print
Show All Records
Save as PDF
Save as Excel
Duplicate
Program Information
Purpose of Visit (please provide a detailed statement. Do not use acronyms)
100 Layout
start
Microsoft Off…
FileMaker Pro…
Inbox - Micro…
\\snl\ne_g

Notes

- Working with information in individual records
    - Assuring you are capturing all the necessary data


FileMaker Pro - [Copy of CMC-A Records]
File Edit View Insert Format Records Scripts Window Help
Browse
Layout:
Host Info
Record:
1
Total:
1
Unsorted
New
Find
Print
Show All Records
Save as PDF
Save as Excel
Duplicate
100
Browse
For Help, press F1
start
Microsoft Off...
FileMaker Pro...
Inbox - Micro...
\\snl\

Host Information Sheet

Name of Meeting: Iraqi Water Quality - MoST Workshop (June 15-19, 2008)

Location of Event:

Task:

Actual Meeting Dates: 4/17/2008 Begin

5/9/2008 End

Description:

Conference Room Needed ☐ Yes ☐ No

US Participant #

International Participant #

Host Information

Organization:

Name:

Title:

Phone:

Fax:

Mobile:

Email:

International Visitor Information

1-10 | 11-20 | 21-30 | 31-40 | 41-50 | 51-60 | 61-70

	LAST, First Middle	Affiliation	Country
1.	Mr. MOHAMED, Jassem	White Field	Jordan
2.	Mr. SALMAN, Abdulkareem	White Field	Jordan
3.	Mr. ABDUL Jabar, Ammar	White Field	Jordan
4.	Mr. H. HADI, Hesham	White Field	Jordan
5.	Mr. AL-ARJEELI, Younus	White Field	Jordan
6.	Ms. KHALAF, Eman	MoST - Food Safety Center	Iraq
7.	Ms. ALI, Suhaila	MoST - Food Safety Center	Iraq
8.	Mr. ADB SALEH, Aessa	MoST - Food Safety Center	Iraq
9.	Dr. AL-SULTANI, Amir	MoST - Food Safety Center	Iraq
10.	Mr. ABDULLAH, Farkad	MoST - Food Safety Center	Iraq

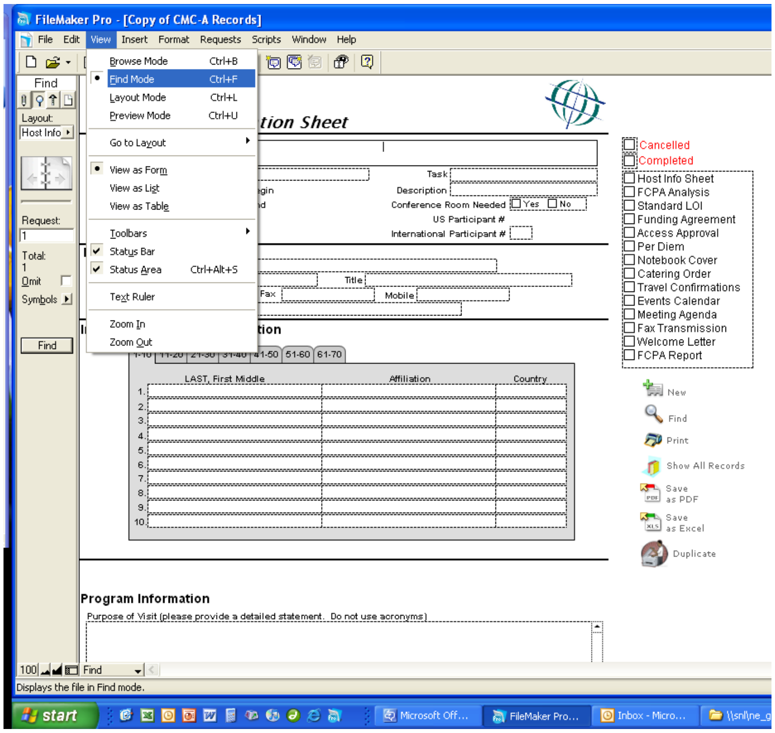
Program Information

Purpose of Visit (please provide a detailed statement. Do not use acronyms)

☐ Cancelled
☐ Completed
☐ Host Info Sheet
☐ FCPA Analysis
☐ Standard LOI
☐ Funding Agreement
☐ Access Approval
☐ Per Diem
☐ Notebook Cover
☐ Catering Order
☐ Travel Confirmations
☐ Events Calendar
☐ Meeting Agenda
☐ Fax Transmission
☐ Welcome Letter
☐ FCPA Report

Notes____

- Searching and finding the records you need
  - Using different views to manage your search


FileMaker Pro - [Copy of CMC-A Records]
File
Edit
View
Insert
Format
Requests
Scripts
Window
Help
Browse Mode Ctrl+B
● Find Mode Ctrl+F
Layout Mode Ctrl+L
Preview Mode Ctrl+U
Go to Layout
● View as Form
View as List
View as Table
Toolbars
✓ Status Bar
✓ Status Area Ctrl+Alt+S
Text Ruler
Zoom In
Zoom Out
Find
Layout:
Host Info
Request:
1
Total:
1
Omit
Symbols
Find
tion Sheet
Task
Description
egin
nd
Conference Room Needed ☐ Yes ☐ No
US Participant #
International Participant #
Title
Fax
Mobile
tion
1-10
11-20
21-30
31-40
41-50
51-60
61-70
LAST, First Middle
Affiliation
Country
1.
2.
3.
4.
5.
6.
7.
8.
9.
10.
Program Information
Purpose of Visit (please provide a detailed statement. Do not use acronyms)
☐ Cancelled
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☐ Meeting Agenda
☐ Fax Transmission
☐ Welcome Letter
☐ FCPA Report
New
Find
Print
Show All Records
Save as PDF
Save as Excel
Duplicate
100
Find
Displays the file in Find mode.
start
Microsoft Off…
FileMaker Pro…
Inbox - Micro…
\\snl\ne_g

Notes____

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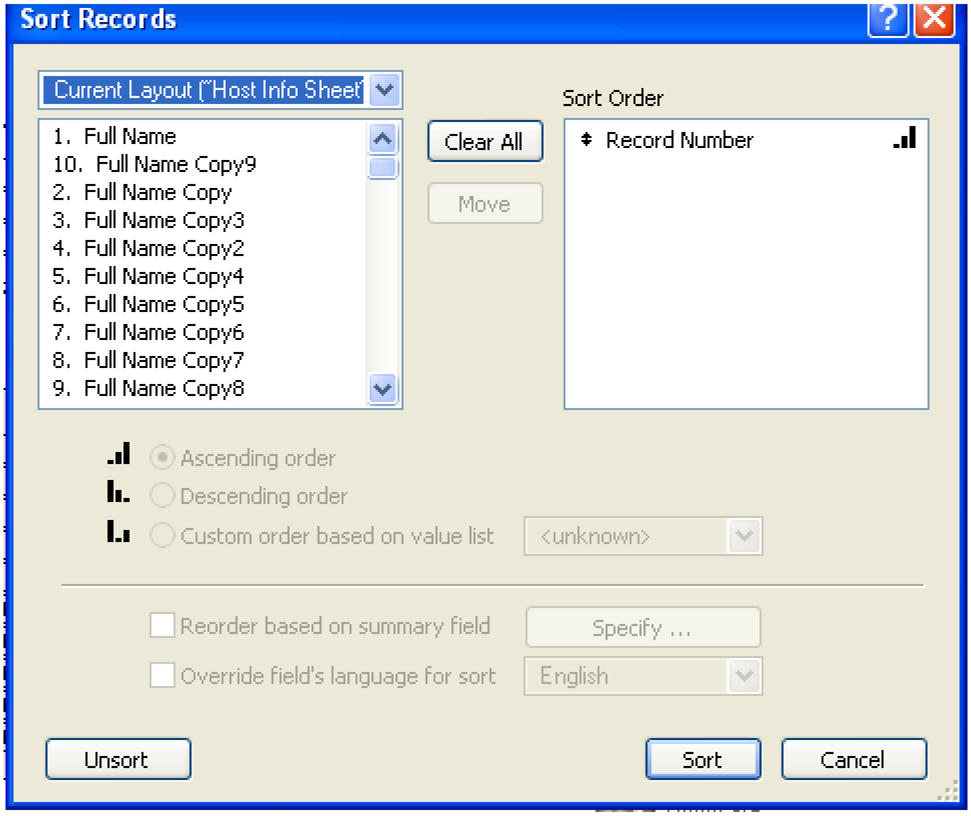
- Sorting groups of records for many different purposes


Sort Records
Current Layout ("Host Info Sheet")
Clear All
Move
Sort Order
Ascending order
Descending order
Custom order based on value list
<unknown>
Reorder based on summary field
Specify ...
Override field's language for sort
English
Unsort
Sort
Cancel

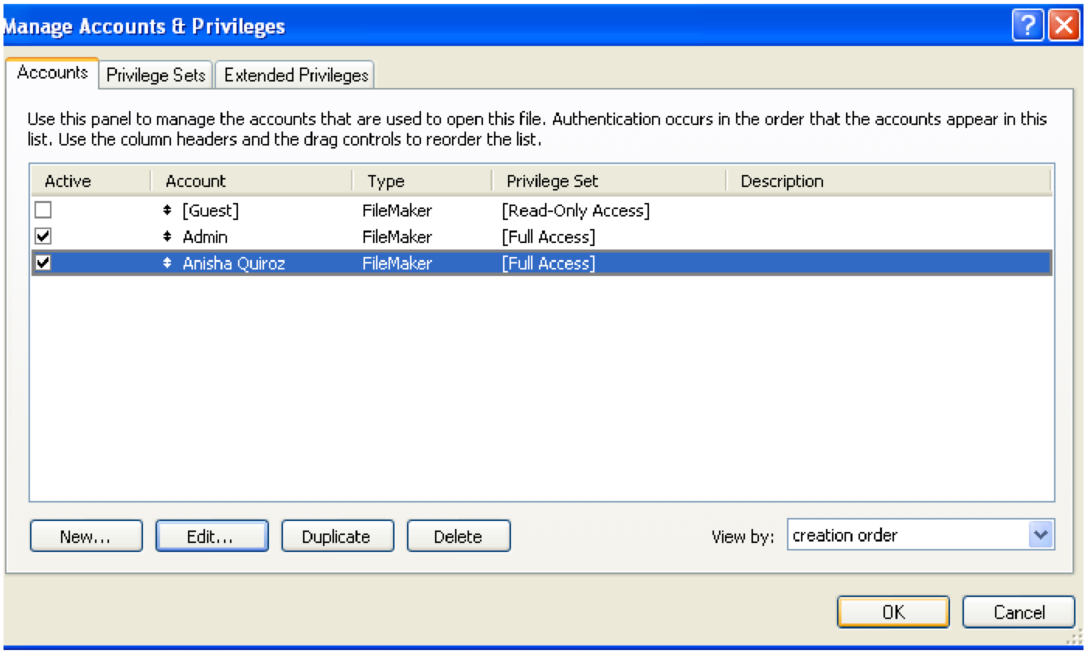
1. Full Name
10. Full Name Copy9
2. Full Name Copy
3. Full Name Copy3
4. Full Name Copy2
5. Full Name Copy4
6. Full Name Copy5
7. Full Name Copy6
8. Full Name Copy7
9. Full Name Copy8

Sort Order: Record Number

● Ascending order
○ Descending order
○ Custom order based on value list
☐ Reorder based on summary field
☐ Override field's language for sort

Notes____

- Creating and managing accounts


Manage Accounts & Privileges
Accounts
Privilege Sets
Extended Privileges
New...
Edit...
Duplicate
Delete
OK
Cancel

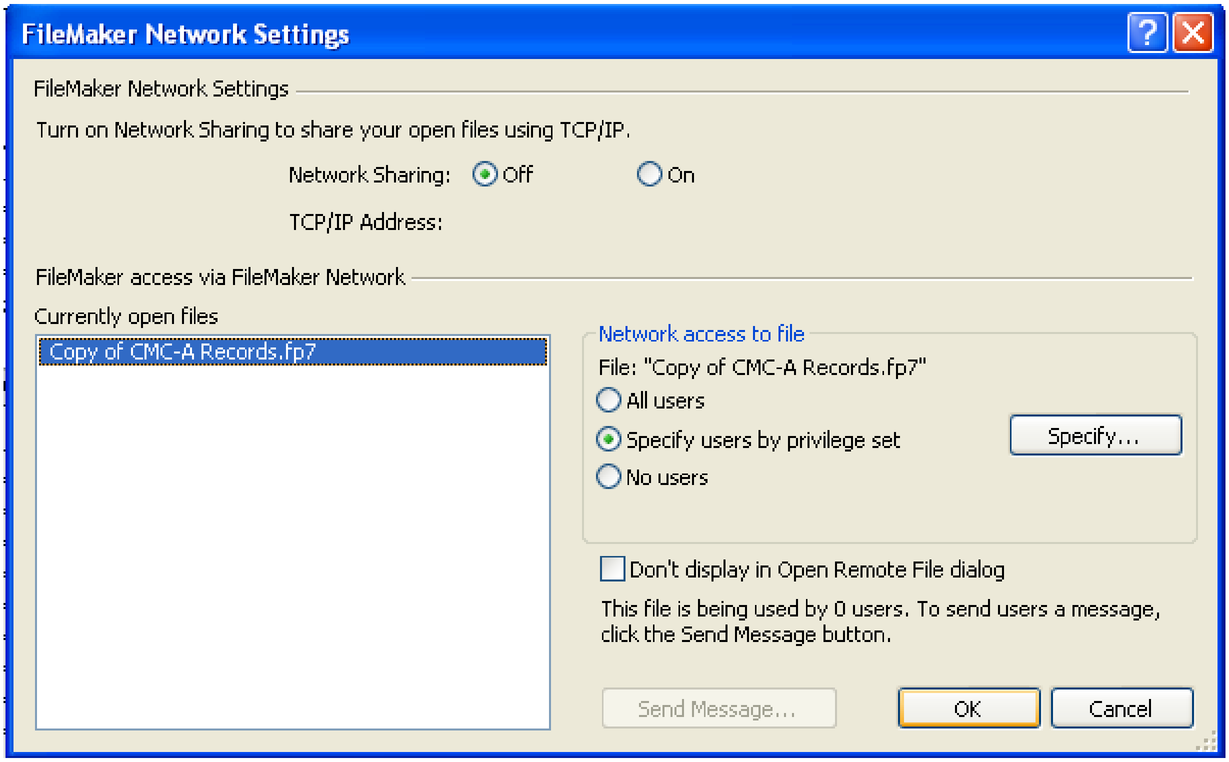
Use this panel to manage the accounts that are used to open this file. Authentication occurs in the order that the accounts appear in this list. Use the column headers and the drag controls to reorder the list.

Active	Account	Type	Privilege Set	Description
☐	[Guest]	FileMaker	[Read-Only Access]	
☑	Admin	FileMaker	[Full Access]	
☑	Anisha Quiroz	FileMaker	[Full Access]	

View by: creation order

Notes____

- Manage sharing files



FileMaker Network Settings

FileMaker Network Settings

Turn on Network Sharing to share your open files using TCP/IP.

Network Sharing: ● Off ○ On

TCP/IP Address:

FileMaker access via FileMaker Network

Currently open files

Copy of CMC-A Records.fp7

Network access to file

File: "Copy of CMC-A Records.fp7"

○ All users

● Specify users by privilege set

○ No users

Specify…

☐ Don't display in Open Remote File dialog

This file is being used by 0 users. To send users a message, click the Send Message button.

Send Message…
OK
Cancel

- Learn FileMaker Shortcuts

Notes____