

# FileMaker Pro: Introduction

You have probably used a computer to gather, process, and share information. For example, you may have searched for product information on the Internet, totalled expenses using a spreadsheet application, or typed and printed a memo using a word processing application. You may now need to store a large amount of information in an organized manner so that you can quickly and easily sort the information in various ways, and locate specific pieces of information efficiently. In this case, you'll use FileMaker to create and use databases to store and organize information so that it is available for efficient retrieval.

## In this course, you will:

- Understand database concepts
- View data in different modes
- Find and sort data
- Create a database and enter records
- Customise the layout
- Create lists, mailing labels, and form letters
- Simplifying data entry
- Create a report

Course Length: 1 day

## Course Content

### **Database concepts**

What is a database?

Why use a database?

How is a database organized?

How is field data displayed?

FileMaker basics and FileMaker modes

### **Browsing information**

Open a database and move between records

View information in different ways

View your layouts as forms, lists, and tables

Explore the status toolbar and layout bar

Customise the status toolbar

### **Finding and sorting records**

Use quick find to search a database

Find records based on criteria in a single field

Find records based on criteria in specific separate fields

Find records that match multiple criteria in the same field

Find records that match a range of criteria in the same field

Narrow your search

Save a find request to use later

Find records using a saved find

Sort your found set

Add a new record in List View



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### **Creating a database and entering records**

- Create a simple database
- About fields
- Enter data into the database
- Create the first record
- Copy data with drag and drop
- Modify data in a record
- Enter data in Form View
- Delete a record
- Insert a file in a container field

### **Customizing what you see**

- About layouts and tables
- About customising layouts
- Explore the layout tools and the Inspector
- Resize, move, and add a field
- Add a tab panel
- Display a number as currency
- Change text size and colour
- Add a graphic to the layout

### **Creating lists, mailing labels, and form letters**

- Create a columnar list
- Create mailing labels
- About labels layouts
- Create a labels layout
- Create a form letter

### **Simplifying data entry**

- Enter data using value lists
- Define a value list
- Assign a value list to a field and display it as radio buttons
- Generate values with a calculation field
- Automatically enter a serial number

### **Automating tasks with buttons and scripts**

- Perform a task using a button
- Perform a series of tasks using a script
- Create a script to preview the Labels layout
- Assign a script to a button



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#### **Creating and running reports**

About summary reports

Create a dynamic report in Table View

Hide data not needed in the report

Group and sort data and define a summary field

Label grouped data and remove duplicate data values

Use an assistant to create a report with grouped data and totals

About layouts for sub-summary reports

Create a sub-summary report with totals

Save and send a report as a PDF fill