

Course Outline

Introduction to FileMaker Pro

Duration: 2 Days

OBJECTIVES

FileMaker Pro is the database “for the rest of us” - a rapid development tool that non-coders can use to manage all aspects of their business. Our introductory course teaches the key techniques in FileMaker needed to build databases, including table structure, layout design, comprehensive search techniques and ways to control the consistency and appearance of data. The course also introduces the fundamentals of relational database design, so that information can be shared across layouts, and the basics of simple automation using buttons.

PRE-REQUISITES

None other than basic IT competency.

COURSE OUTLINE

Getting started

- Definitions: databases, tables, records & fields; field types
- The FileMaker Quick Start screen
- Creating a database (1) From scratch; (2) From an Excel spreadsheet
- Modes and Views
- Creating, modifying and editing records
- Sorting records and Finding records using different search criteria

Creating and modifying layouts

- What are layouts?
- Creating new layouts
- Form, List and Report layouts
- Applying and reapplying Layout Themes
- Using the Field picker to add fields to a layout
- Using the target device stencils
- Placing date and page number codes
- Using Tab controls
- Applying field, border, text, number and Conditional formatting
- Using Popovers and Slide Controls

Simple Button actions

- The principles of database automation with buttons and scripts
- Creating simple buttons
- Attaching button icons (glyphs)

Comprehensive searching techniques

- Include and Omission searches
- Using multiple search criteria
- Using multiple requests
- Using Saved Finds
- Using QuickFind

Controlling entry of data into fields

- Entering data from the last visited record
- Using Value Lists and Calendar Popups
- Auto-entry of data and calculated values; validation of values
- Formatting the data in fields
- Using In-Field labels

Calculation fields

- Calculation types including Number, Date and Text calculations
- Using arithmetic and formulae
- Introduction to some popular functions including Text, Number and Logical functions

Updating record sets

- Using the Replace Field Contents command
- Updating with a fixed value
- Updating Serial Numbers
- Updating according to a calculated formula

Summary fields and summarised reports

- What is a Summary field?
- Creating a Summarised Report
- The Sub-summary Part
- The Sort field for Sub Summaries

Merge Fields and “Mail Merge” style options

- What is a merge field?
- Placing merge fields on the layout
- Designing a mail-merge letter layout

Creating simple charts

- Using the charting tool
- Creating simple pie, bar, horizontal bar, line and area charts
- Adding chart and axis titles
- Formatting the chart

Introduction to Relational Databases

- Defining relationships between tables and understanding the concept of key fields
- Understanding one-to-many and many-to-one relationships
- Using Portals
- Using Lookups