

# FileMaker Pro Training Module: FileMaker Basics

## 6 Hours

1

### Understanding a Database

- Fields vs. Records
- Database information vs. Spreadsheet information

### Working in FileMaker Pro

- Opening FileMaker
  - Opening existing database
  - Using supplied templates
  - [Action: Open Business Card template]
- FM's menus (for simple data entry)
  - Understanding View modes
  - Adding New Records
- FM's Toolbars
  - Standard
  - Text Formatting
  - Tools
  - Arrange
- FM's Status area (in document window)
  - Layout selection
  - Record Selection
  - Zoom selection
  - Mode selection
  - Scroll Bars
- "Saving" FM files
  - Setting auto-save prefs
  - Performing a Save-As

### Working with Records and Files

- Entering Data
  - Moving from Field to Field using Tab
  - Creating New (additional) Records
  - [Action: Enter 2-3 records in template]
  - Deleting Records
    - Delete Record vs. Delete All
  - Duplicating Records
- Moving & Viewing Records
  - Moving from Record to Record
  - Viewing Multiple or Single Records
- Using Spell Check
  - Selection vs. Record vs. All
  - Spell Check prefs for Document
- Finding Data in Records
  - [Action: Open Example-1.fmp database]
  - Performing a Find Request
    - Single-Criteria Find
    - Multiple-Criteria Find
      - Same Find Record [requires BOTH criteria]
      - Additional Find Record(s) [either/or]
  - Modifying Find Requests
    - Omitting Records during Find
    - Deleting/Duplicating Requests
  - Showing All Records after a Find

## Sorting Data in Records

### Performing a Sort

#### Selecting a Field to Sort

#### Understanding Sort Order

#### Selecting multiple Fields to Sort

#### Rearranging Sort Order

#### Ascending vs. Descending Order

## Creating New Databases

### Planning a Database

[Action: Create new Example\_1 database from scratch]

#### Create a Field list (on paper)

#### Determine Field Type

#### Text, Number, Date, or Time

#### Container (for Graphics & Media)

#### Calculations

#### Creating a Data Structure Flowchart

#### Create a Rough layout (on paper)

### Creating a New Database

#### Defining Fields

#### Changing Fields

#### Changing Type

#### Changing Name

#### Field Entry Options

#### Auto-Entry Options

#### Validation Options

#### Using Value Lists

#### Creating Value Lists

#### Assigning Value Lists to Fields

#### Using Calculation Fields

#### Basic Numeric Formulas

#### Combining Text Fields

## Working With Layouts

### Creating A New Layout

#### Choosing a Layout Type

#### Standard, Blank

#### Columnar, Table

#### Labels, Envelope

#### Renaming and Reordering Layouts

#### Deleting and Duplicating Layouts

### Working with Fields in Layouts

#### Adding Fields in Layouts

#### With and Without Labels

#### Deleting Fields in Layouts

#### Setting the Field Tab Order

#### Resizing Fields in Layouts

### Editing Objects on Layouts

#### Moving Objects

#### Deleting Objects

#### Grouping/Ungrouping Objects

#### Locking/Unlocking Objects

#### Changing the Object Stacking Order

#### Rotating Objects

#### Aligning Objects

## Formatting Fields in Layouts

### Formatting Text

- Entering New Text on Layout
- Selecting and Editing Text
- Setting Text Format Defaults
- Setting Multiple Text Attributes
- Setting Fonts, Text Sizes, and Styles
- Setting Text Alignment and Line Spacing
- Setting Text Colors

### Formatting Numbers

### Formatting Date Fields

### Formatting Time Fields

### Formatting Graphic Fields

### Formatting Fields and Objects

#### Pop-Up Lists

#### Pop-Up Menus

#### Adding Scroll Bars to Fields

### Changing Field Borders

## Working with Layout Graphics

### Drawing Objects

### Selecting and Moving Objects

### Resizing Objects

### Changing Fill Colors, Patterns, and Effects

### Changing Pen Colors, Patterns, and Widths