

Lesson 1

FileMaker Pro basics

Welcome to the FileMaker® Pro tutorial. This tutorial shows you how you can manage your information in FileMaker Pro.

You will learn how to use FileMaker Pro software to:

- locate and sort information
- create and enter records in a simple database
- create mailing labels
- create calculations, buttons, and scripts
- create and run reports
- use the relational capabilities of FileMaker Pro

It takes approximately four hours to complete this tutorial, which can be done in one session or several shorter sessions.

How to use this tutorial

These lessons are based on the membership database of a fictitious travel firm, The Corporate Travelers Club. Corporate travelers who are members of this club save their businesses money on travel costs, and the club's expenses are offset by an annual membership fee. FileMaker Pro is used to track the members' names, addresses, and membership status, as well as to generate labels and form letters to contact members.

It's best to complete these lessons sequentially, as the concepts introduced in early lessons are assumed to be understood in later lessons. However, because the lessons are self-contained, it's possible to skip lessons entirely, or to complete them later if desired.

This tutorial assumes that you are familiar with your computer's operating system. Opening files, locating folders, and other activities that require some knowledge of your computer's OS are a necessary part of completing this tutorial.

Note All persons and companies listed in the sample files are purely fictitious, and any resemblance to existing persons and companies is purely coincidental.

Files included with this tutorial are intended to illustrate the features of FileMaker Pro, and as such, might be unsuitable for use as templates for further development.

We begin with a demonstration

To show you the goal of each lesson up front, we guide you through a sample file that illustrates a feature or concept. This way, you will always know a lesson's objectives.

We explain how it works

As we introduce new techniques and concepts, we will explain how to use them in other situations.

You build the structures

Because using FileMaker Pro is the most effective way to learn the application, each lesson features a hands-on activity designed to guide you through menus, screens, and concepts step by step.

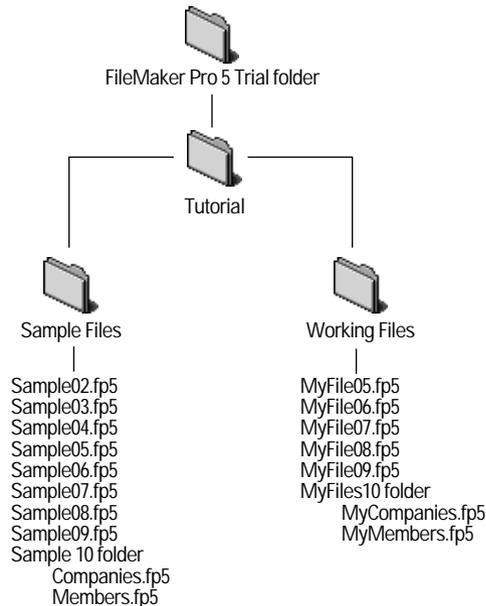
Where to find the lesson files on your hard drive

The files used in this tutorial are installed as part of a typical FileMaker Pro installation set. They are also included with the trial version.

The sample files illustrate the concepts explained in the lessons, and let you see how features work before you build them. Refer back to the sample file associated with each lesson if you need to. The tutorial sample files for lessons 2 through 9 are installed in FileMaker Pro 5 Trial folder\Tutorial\Sample Files. The sample files for lesson 10, which explains relational databases, are installed in FileMaker Pro 5 Trial folder\Tutorial\Sample Files\Sample10.

The working files mimic the sample files, except the features being taught in particular lessons have been removed. You will add these missing items and structures as you complete each lesson. The working files for lessons 5 through 9 are installed in FileMaker Pro 5 Trial folder\Tutorial\Working Files. The working files for lesson 10 are installed in FileMaker Pro 5 Trial folder\Tutorial\Working Files\MyFiles10.

Overview of the FileMaker Pro Tutorial folder structure



Database concepts

What is a database?

A *database* is a method of organizing and analyzing information. You've probably used several databases recently without realizing it. A date book, a parts list, and even your own address book are databases.

Why use a database?

Storing information in a database file has many benefits. A database doesn't just hold information—it helps you organize and analyze the information in different ways. For example, databases allow you to group information for reports, sort information for mailing labels, count your inventory, or find a particular invoice.

Computerized databases offer many additional advantages over their paper-based counterparts: speed, reliability, precision, and the ability to automate many repetitive tasks.

How is a database organized?

A database file is organized into *records*. Each record is a collection of *fields*.

Imagine your address book is a FileMaker Pro database file. Each listing in your address book is one record. Each record has information, such as name, address, and phone number. Each of these pieces of information—name, address, and phone number—is stored in a separate field.

FileMaker Pro basics

Unlike most word processing or spreadsheet programs, FileMaker Pro saves your work automatically. Consequently, it's important to carefully consider your actions when making sweeping changes to your files, especially when deleting records. Once records are deleted, they are completely removed from your database.

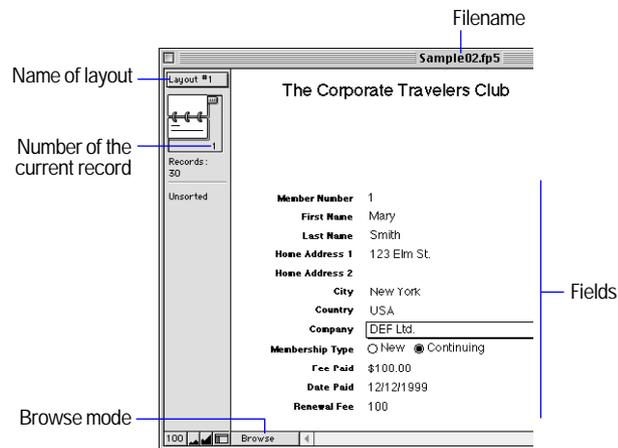
As you will learn in lesson 11, you should back up your files on a regular basis. Backups can save you many hours of unnecessary work and worry in the event that your files become lost or damaged, or records are inadvertently deleted.

About FileMaker Pro modes

When you work in FileMaker Pro, you work in one of four *modes*.

- Use *Browse mode* to enter data and view records.
- Use *Find mode* to locate a record or a group of records quickly.
- Use *Layout mode* to specify how information will appear on the screen or when you print it.
- Use *Preview mode* to see what the pages will look like when you print them.

Once you have opened a database, you can switch from one mode to another using either the View menu or the mode pop-up menu at the bottom of the application window. You can also quickly determine which mode your FileMaker Pro database is using by referring to this pop-up menu.



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