

## FileMaker Pro

---

### Course Summary

#### Description

FileMaker Pro is an award-winning database software program that works both for Mac, Windows and Mobile users. This comprehensive four-day hands-on FileMaker Pro course focuses on the features and benefits of FileMaker with step-by-step easy to follow instructions plus mentored lab exercises. Attendees will learn how to build a sample FileMaker solution from start to finish using all of the built-in tools and templates to demonstrate the different kinds of databases you can create with FileMaker Pro. The course also covers calculations, scripting, and how to keep your data secure.

#### Topics

- FileMaker Platform Overview
- Understanding a Database
- Using Starter Solutions
- Viewing and Working with Data
- Finding and Sorting Records
- User-Interface Best
- Creating Fields and Tables
- Layouts
- Layout Design Tools
- Reporting
- Integration
- Formatting Field Objects
- Relationships
- Special Layout Objects
- Importing Data
- Scripting
- Solution Logic: Calculations
- Solution Logic: Scripting
- Exporting Data
- Calculations
- Security
- Deployment

#### Prerequisite

- Basic knowledge of a Mac or PC computer
- Understanding some database terminology is helpful

#### Duration

Four Days

## FileMaker Pro

---

### Course Outline

- I. **FileMaker Platform Overview**
  - A. FileMaker Product Line
  - B. FileMaker Version Compatibility
  - C. Accessing a Solution
- II. **Understanding a Database**
  - A. Fields vs. Records vs. Tables
  - B. Database information vs. Spreadsheet Information
- III. **Using Starter Solutions**
  - A. Choose a Starter Solution
  - B. Quick Mobile Development
- IV. **Viewing and Working with Data**
  - A. Layouts
  - B. Modes Within Layouts
  - C. Views Within Layouts
  - D. Records: Adding, Deleting, and Duplicating
  - E. Working With Data
- V. **Finding and Sorting Records**
  - A. Specifying Search Criteria
  - B. Extending and Constraining a Found Set
  - C. Using Operators in Search Criteria
  - D. Sorting Records
- VI. **User-Centered Design**
  - A. Understanding User-Centered Design
  - B. Basic Principles
- VII. **User-Interface Best Practices**
  - A. Objectives
  - B. User-Interface Best Practices
- VIII. **Creating Fields and Tables**
  - A. New Tables
  - B. Field Types
  - C. Create New Fields from the Field Picker
  - D. Create New Fields from the Manage Database Dialog
- IX. **Layouts**
  - A. Creating Layouts
  - B. Adding Fields to a Layout
  - C. Layout Themes and Styles
  - D. Creating More Layouts
- X. **Layout Design Tools**
  - A. Status Toolbar and Inspector
  - B. Layout Resizing
  - C. Guides and Grids
  - D. Using Layout Design Tools
- XI. **Reporting**
  - A. Basic Reports
  - B. Planning for Reports
  - C. Subsummary Reports
  - D. Working with Charts
- XII. **Integration**
  - A. Sharing Data With Outside Users
  - B. Integrating with Other Data Sources
  - C. FileMaker Pro Connectivity Options
  - D. Integrating with Web Services
  - E. Working ODBC
- XIII. **Formatting Field Objects**
  - A. Data Formatting
  - B. Conditional Formatting
  - C. Field Control Styles
  - D. Value Lists
- XIV. **Relationships**
  - A. Objectives
  - B. Relationships
  - C. Using Primary and Foreign Keys to Relate Tables
  - D. Creating One-to-Many and Many-to-Many Relationships
- XV. **Special Layout Objects**
  - A. Portal
  - B. Tab Control
  - C. Slide Control
  - D. Popover
  - E. Web Viewer

## FileMaker Pro

---

### Course Outline(cont.)

- XVI. **Importing Data**
  - A. Converting an Existing File
  - B. Converting Excel Files
- XVII. **Scripting**
  - A. Understanding Scripts
  - B. Creating and Editing Scripts
  - C. Writing Scripts
  - D. Buttons
  - E. Startup Script
- XVIII. **Solution Logic: Calculations**
  - A. Mobile Functions
  - B. Container Functions
  - C. Aggregate Functions
  - D. Custom Functions
- XIX. **Solution Logic: Scripting**
  - A. Conditional Scripting
  - B. Scripting Tools
  - C. Script Triggers
  - D. Custom Menus
  - E. Using Scripts to Find Data
  - F. Navigation
  - G. Window Management
  - H. Looping Techniques
  - I. Scripting for Mobile Users
- XX. **Exporting Data**
  - A. To Tab-Delimited Text
  - B. To Excel
  - C. Sending Records as Email
  - D. Creating PDFs
  - E. Data Repair
- XXI. **Calculations**
  - A. Creating Calculations
  - B. Functions and Operators
  - C. Number Functions
  - D. Text Functions
  - E. Date and Time Functions
  - F. Logical Functions
- XXII. **Security**
  - A. Creating Accounts and Granting Access
  - B. Setting Up Privilege Sets
  - C. Restricted Conditional Deletes
  - D. Conditional Record Access
  - E. Advanced Security & Encryption
- XXIII. **Deployment**
  - A. Deployment Options
  - B. Introduction to Using FileMaker Server
  - C. Deploying Using FileMaker WebDirect