

FileMaker Pro

Organize. Connect. Find. Report.
Powerful relational databases for everyday use.

Your Data

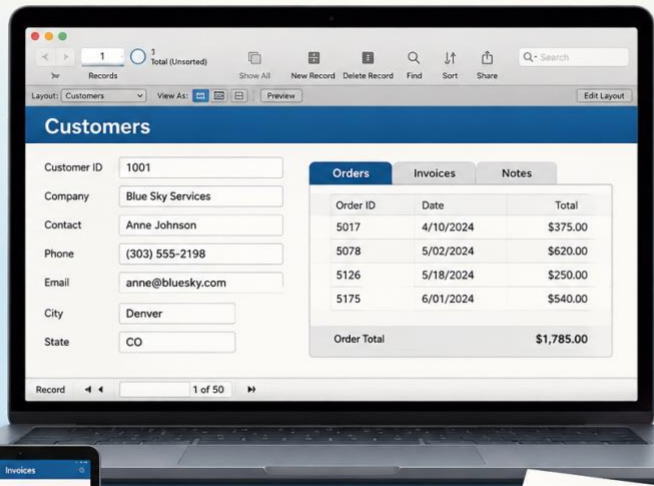


Import from Excel and other sources

Related Tables



Connect information for powerful results



Share and access across devices

Find
Search and filter to find exactly what you need.

Organize
Sort, group, and view your data your way.

Calculate
Create calculations and summaries that make sense.

Report
Present your data with clear, useful reports.

Automate
Use scripts to save time and eliminate steps.




FileMaker Pro Made Easy: What It Is and What It Can Do

FileMaker has been around almost as long as the Macintosh itself. First introduced in the 1980s, it became a favorite database program among Mac users because it offered something unusual: considerable database power without requiring the user to be a professional programmer. A Windows version eventually followed, and FileMaker developed into a cross-platform relational database system.

Today, FileMaker Pro is produced by Claris, an Apple subsidiary, and continues to run on both Macs and Windows PCs. Although the program has grown considerably more sophisticated over the years, its basic purpose hasn't changed very much: **FileMaker helps you organize information and put that information to work.**

First, What Is a Database?

A database is simply an organized collection of information. Your address book is a database. So is a list of customers, a home inventory, a collection of books, a medical office's patient records, or a company's list of employees.

At its simplest, a FileMaker database looks somewhat like an Excel spreadsheet. It contains **fields** and **records**. A field holds a particular kind of information—Last Name, Address,

Telephone Number, Date Purchased, Price, and so forth. A record contains all the information about one person, product, transaction, or other item.

That's where the similarity to a spreadsheet begins to end.

Excel is primarily designed to work with numbers, formulas, tables, and calculations. FileMaker is designed to **store, organize, find, relate, display, and report information**. It can perform calculations very well, but managing information is its real specialty.

The Power of Related Information

FileMaker is a **relational database**, which means that information doesn't have to be stored in one enormous table.

Suppose you operate a small business. You might have one table containing your customers, another containing products, and a third containing orders. Instead of typing a customer's name, address, and telephone number every time that person places an order, the database can connect—or *relate*—the order to the customer's existing record.

Change the customer's telephone number once, and you don't have to change it in every order the customer has ever placed.

That's one of the great advantages of a relational database: **enter information once and use it wherever you need it**.

You May Already Have the Beginnings of a Database

Many people keep lists in Excel because spreadsheets are familiar and convenient. Perhaps you've maintained a membership roster, inventory, customer list, household budget, or collection for years.

You don't necessarily have to start over.

FileMaker can import information from Excel spreadsheets and other commonly used data formats. An Excel column labeled **Last Name**, for example, can become a FileMaker field called Last Name, while each spreadsheet row becomes a separate record.

There is some planning involved—particularly if that large spreadsheet should eventually become several related tables—but existing spreadsheet data can provide an excellent starting point for a FileMaker database.

We'll look at that process in the next article in this series.

More Than Rows and Columns

One of FileMaker's greatest strengths is the way it lets you present the same information differently for different purposes.

A customer database might have a simple screen for entering names and addresses, another layout showing a list of all customers, an invoice screen displaying purchases, and a report showing sales by customer. The underlying information remains in the database; FileMaker simply presents it in whatever form is useful at the moment.

These screens are called **layouts**, and creating them is one of the features that makes FileMaker considerably different from working with a spreadsheet.

Find the Information You Need

A database isn't particularly useful if you can't retrieve information from it.

FileMaker lets you search—or **Find**—records using the information stored in your fields. You could find everyone who lives in Colorado, every invoice that hasn't been paid, all purchases made during a particular year, or every member whose membership expires next month.

Once FileMaker finds those records, you can sort them, examine them, change them, print them, or use them in a report.

We'll devote an entire article to performing searches because learning how to ask your database the right questions is one of FileMaker's most useful skills.

Let FileMaker Do the Repetitive Work

FileMaker also includes **scripts**, which automate tasks you would otherwise perform manually.

A script might find a particular group of records, sort them alphabetically, switch to a report layout, and prepare the results for printing. Instead of performing those steps individually every time, you can tell FileMaker to perform the entire sequence for you.

Don't let the word *script* scare you. You don't have to become a computer programmer to create useful FileMaker scripts. Many are built by selecting commands and arranging them in the order you want FileMaker to perform them.

Calculations and Summaries

Although FileMaker isn't a spreadsheet, it certainly knows how to work with numbers.

You can create calculations that multiply quantity by price, determine someone's age from a birth date, calculate a percentage, combine text from several fields, or determine the number of days between two dates.

Summary fields can then answer larger questions: How many customers do I have? What were total sales this month? What was the average purchase? How many members belong to each category?

This is where a collection of individual records begins turning into genuinely useful information.

FileMaker Can Grow With You

A simple FileMaker database can be created and used by one person on one computer. More sophisticated FileMaker solutions can be shared among multiple users and hosted with FileMaker Server or FileMaker Cloud. FileMaker Go extends FileMaker solutions to the iPhone and iPad.

Modern FileMaker has capabilities that would have seemed extraordinary when the program first appeared in the 1980s, including web connectivity, sophisticated automation, integrations with other applications, and even artificial-intelligence features.

But you don't need any of those things to appreciate FileMaker.

You can start with a table containing a few fields and a few dozen records. As you learn more, you can add layouts, related tables, calculations, reports, and scripts. Your database can become more sophisticated as your needs and skills grow.

And that's one of the things I've always liked about FileMaker: **you don't have to be a database expert to begin using a database.**

Coming Next: From Excel to FileMaker

If you already have information stored in an Excel spreadsheet, you're halfway to creating your first FileMaker database. In the next article, we'll look at how a properly designed Excel table can be imported into FileMaker and transformed into the foundation of a working database.