

FileMaker For Beginners

Tutorial

Getting Started, Fresh After The Install

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First Things First

I will be taking you through this tutorial from the context of FileMaker Pro 11, if you have FileMaker Pro 11 Advanced it doesn't make a difference as we won't be going into any *Advanced* features in this tutorial. So just follow along, whichever version you have.

I will also be using Windows, not Mac. But, seeing that FileMaker Pro is cross-platform there shouldn't be too many differences, so you'll still benefit.

When you have just finished installing FileMaker Pro, this tutorial will help you find your feet and give you some direction as to what to look at first. If you are the *Activist* type, then you will already be ploughing into the application and you are already stuck. Great, that's what this article is here to help with.

On the other hand, if you are the *Pragmatist*, *Theorist* or *Reflector* type of person, you'll want some guidance, theory or hand-holding.

If you are a natural user you'll learn quickly by doing, if you are a power user - your intuition will take you the whole way.

So, this tutorial won't be much use to a power-user.

Great, we're all at the same place now - so let's start.

Where to Begin

Firstly, there is no *right* place to start with FileMaker Pro. The right place to start will be different for everyone, depending on how much you already know about databases, software, et al. And, also how good a user of applications you are, in general.

This article is for those people that we would normally describe in computer terms as: *Illiterate*.

This guide is not intended to be a replacement for any of the FMP help files. It is simply a guide of what to learn, and in which order, without becoming overwhelmed.

For the benefit of brevity, from now on I will refer to **FileMaker Pro** as: **FMP**

So, you are just dying to plough-in and make a World beating product with FMP by tomorrow, or gain 250% efficiency savings for your company before lunchtime today..

STOP!

You are already in the wrong mindset.

Mindset

Starting out with FMP has thousands of analogies, but my favourites are learning to talk, and learning to drive:

Learning FileMaker is like learning to talk, nobody fully understands how we learn to do it, but we do. Eventually, we become so damn good at it that one language simply isn't enough.

When you learn to drive, you don't just get in, strap up and pedal to the metal.

You find an instructor who you feel can get you to pass first time, and who can teach you to drive safely without killing any kids or old folk along the way. First lesson, figure out how to slow down, second lesson figure out how to stop, third lesson figure out how to go.

So, to bring you into a sense of reality, you are not going to be programming any code today, or tomorrow, or the next day. (*Activists excluded, of course, wild horses and all that..*)

You need to learn *how to learn* first, then learn the basics, then start coding at a basic level with no shortcuts. Experts can take shortcuts, beginners taking shortcuts are just accidents waiting to happen.

FMP Beginner, Rule #1: Learn Long, Code Short.

The truth is that no matter which route to coding you take, ultimately you will need to do a minimum amount of learning. This is finite, you can't make it smaller, shorter or faster, you can only make it longer and more fragmented, and you probably will.

Just persist, it all comes good fairly quickly.

How To Start Learning Long

Start with the help files in FMP. This is a tedious but necessary first step. The help files are reasonably good, it depends how you learn. You should learn the concepts first, don't dive into detail at the beginning. Learn topics, not intricacies.

Don't rely on the marketing videos and media, they are designed to make you buy FMP, not use it.

My advice would also be to spend 2-3 days reading through the help section in FMP. When you have a conceptual grasp on how it works, then you can go and look at forums. I would advise that you steer clear of forums for a while yet.

There are a number of other web sites that provide both free and paid help for FMP. Here's a list of just a few, there are many more:

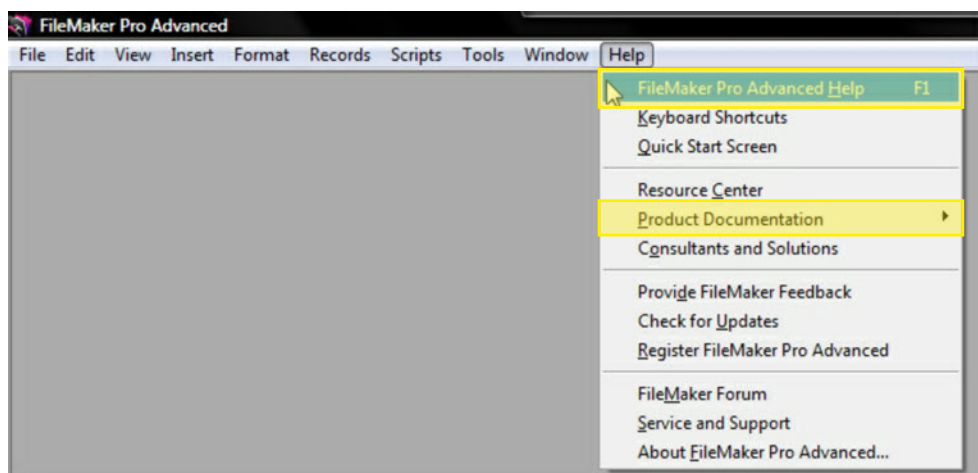
- ISO FileMaker Magazine - <http://www.filemakermagazine.com/>
- Support Group - <http://supportgroup.com/explore>
- FileMaker's Own Help Forums - <http://forum-en.filemaker.com>
- FMForums - <http://fmforums.com/>

Depending on your level of understanding you might start in different places. Again, there is no right or wrong way to start learning FMP, just learn first and *do* later.

So, as someone who was a power user and is self-taught with FMP I would advise the following schedule of learning, using the help files. Feel free to choose your own route based on what you know already.

Tip: How to Access the Help Files - Simply press F1 on your keyboard

You could also use FileMaker's own Getting Started guides, which you can access from the Help menu, both are highlighted here -



Continued...

However, I wouldn't be spending time writing this article if I thought that the FMP help files had already got it nailed. Whilst they are extensive and comprehensive, they are not written for absolute beginners. Here's an example of how FMP describes a database:

A *database* is a collection of information, or data, that you can organize, update, sort, search through, and print as needed. Unlike an electronic *spreadsheet*, which is used to tabulate and calculate data stored in the cells of a rectangular table, a database is a collection of knowledge tied together by a schema that describes the organization of database tables, their fields, and the relationships between the fields and tables.

Does it sound like plain English? If it does, you don't need the rest of this article. See you in the next article..

So, once more in plain English:

A database stores information. Unlike Excel spreadsheets and Word documents, the information you type-in is stored straight away, you don't need to save it.

Another benefit of a database is that more than one person can work with it at the same time.

One thing you will get used to with FMP documentation is that they frequently use the *description* to also tell you how it works. Personally, I don't believe this is an effective way to use a description.

A conventional database really is just a place to store information and data. The unique thing about FMP is that it is used to display this information too.

The part of FMP that is used to display the information is known as the UI (User Interface).

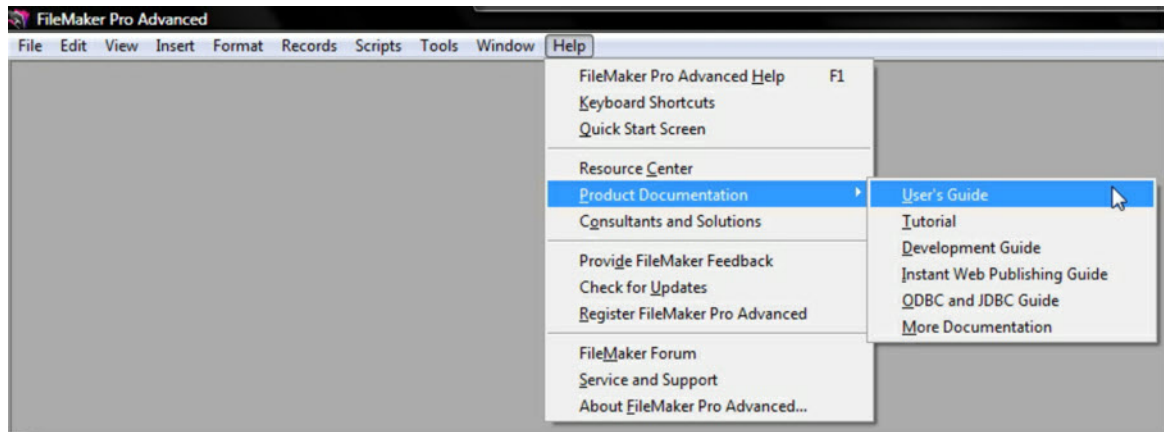
We will come to this later, but for now just bear the term *UI* in mind.

Learning Schedule

Step One - Learn What Things Are

- Learn what a database is, if you don't already know.
- Learn how a database stores information, don't learn relationships yet.
- Learn about *Fields*, *Records* and *Tables*
- Learn about Layouts
- Learn what Browse, Find, Layout and Preview Modes are.

If you are relatively comfortable with what the above items are, then jump straight into the *FileMaker User Guide*, found here:



If you are not familiar with those terms, I'll be releasing some more articles very soon that will try to explain them in plain English.

Step Two - Learn How To Create Things

- Learn how to create a *Table*
- Learn how to add *Fields* to your Table
- Learn about the different types of *Fields*
- Do **not** start looking at the *Relationship Graph* just yet.
- Learn how to create a *Layout*

Step Three - Learn How To Bring All These Together

- Learn how to add *Fields* to a layout
- Learn how to create *New Records*
- Learn how to *Delete Records*
- Learn how to input data into your *Fields*

Step Four - What Not To Learn, Just Yet

- Don't learn about Creating a Database (sounds crazy, but trust me..)
- Don't learn about Relationships
- Don't learn about Portals
- Don't learn about making a pretty UI (more on UI in a bit..)
- Don't learn about Scripts
- Definitely don't learn about Custom Functions
- Don't learn about Security
- Don't learn about Custom Menus
- Don't try to learn every Function and Calculation
- Don't learn about Reports
- Don't learn about sharing and networking

By the time you get to this point you will have encountered many of the above items during your reading in the Help files. So I thought this point would be a good time to say **not to learn** about these items, yet. Of course, you will need to learn them - but all in due course. Walk first, then jog, then run.

When you first look into FMP, you don't want to create a database. This puts you into the wrong mindset. When you create a new database you instantly want to go into developing mode, stay away from developing mode until you've learned how to be a *user* and a *modifier*.

Start always with one of the pre-made solutions. These solutions are only mildly technical, so they are a decent starting point to learn development.

Remember that you need to evolve as a developer, most of us that develop FMP for a living would not develop solutions like the starter solutions - but unless you go through that evolution you will struggle to comprehend the really technical stuff much later on.

FMP Beginner, Rule #2: Backup, Backup, Backup.

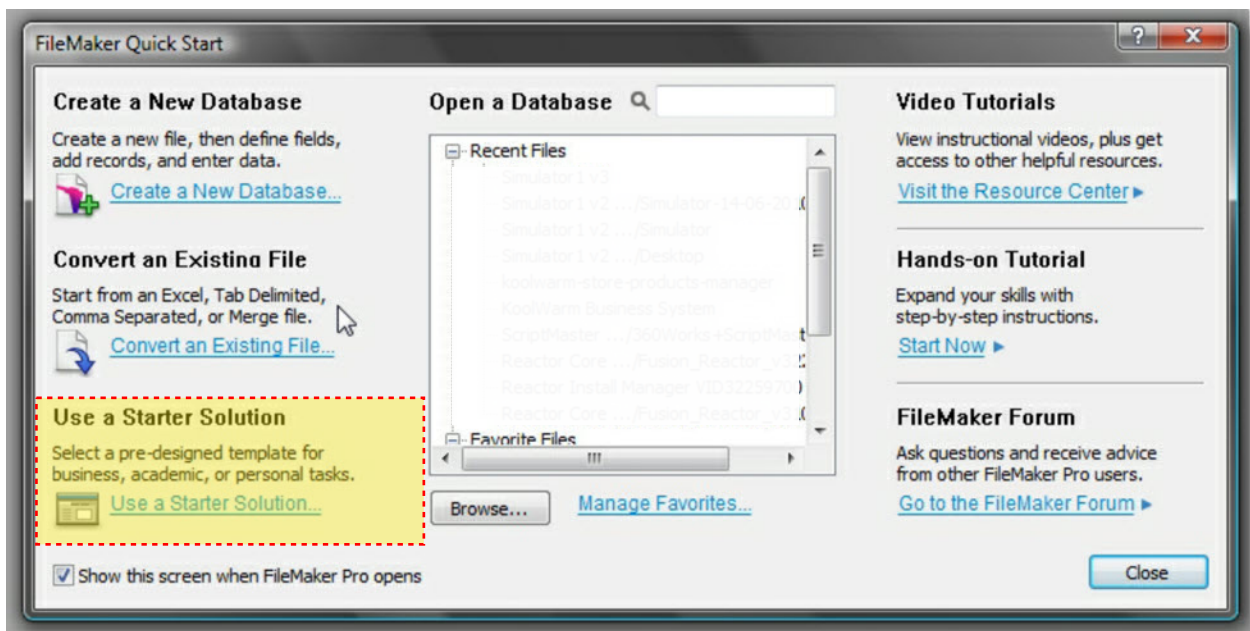
The first menu command you should learn to use is "Save a Copy As". If you don't backup and something goes wrong, you could be in deep water. Learn it now whilst you are playing with the starter solution.

Don't backup on the same computer or server, if you want to use a simple storage facility try Dropbox.com. Backup frequently and to more than one storage location.

Step Five - Open a Starter Solution

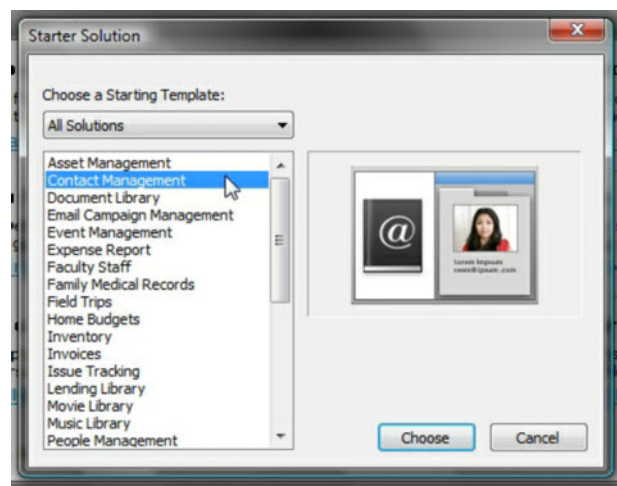
- Choose a solution that either interests you, or better, one that is similar in some way to what you want to create.
- Get straight into using whichever solution you decide to open
- Add records, add many records. Then use the functions that are there in that solution. Even if you don't understand how they work, which is most likely you won't, just get used to the concept of entering data and using the solution. Click everything that looks remotely 'clickable' to see what it does.
- Don't get daunted, and don't look behind the scenes just yet, we'll be doing that very soon. If you go and look behind the scenes now you'll scare yourself unnecessarily, you'll see the picture of two serial killers with knives that when you look further is a harmless picture of two dolphins - but the damage is already done.

Open a starter solution, like this:



Another window opens showing the starter solutions, just pick one.

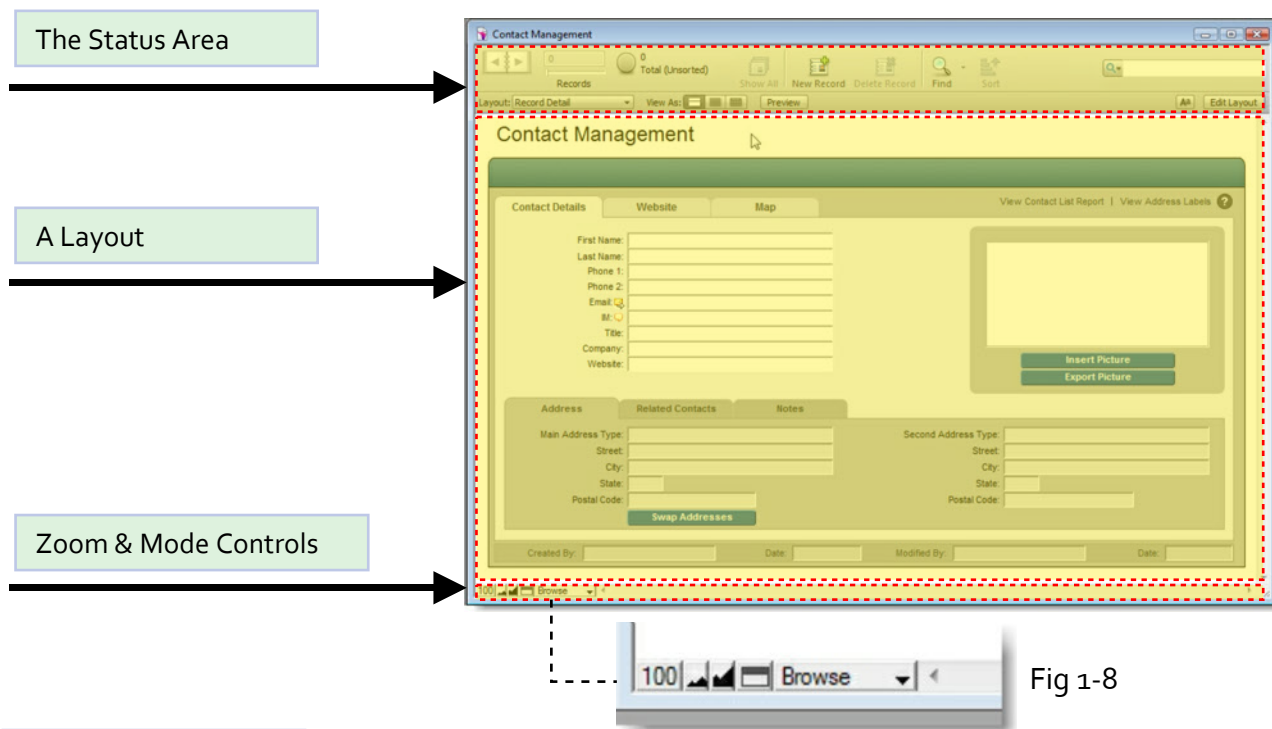
Just for an example, I am selecting Contact Management. Most solutions will need Contacts of some description.



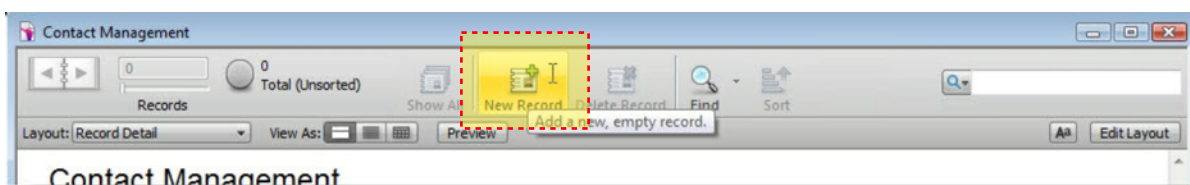
This is what the Contact Management starter solution looks like, if you picked a different one, that's fine - it won't matter for the purposes of this tutorial. We are just touching the wrapping paper here, no more.

So, the screen that you now see is the UI. The *User Interface*, the place where the database and the *User*, that's you, come together and actually do stuff.

Here's what you're seeing:



Add a New Record



Here's where you can play along with it for a few hours. Click everything, add tons of records, try and break it if you want. It's up to you.

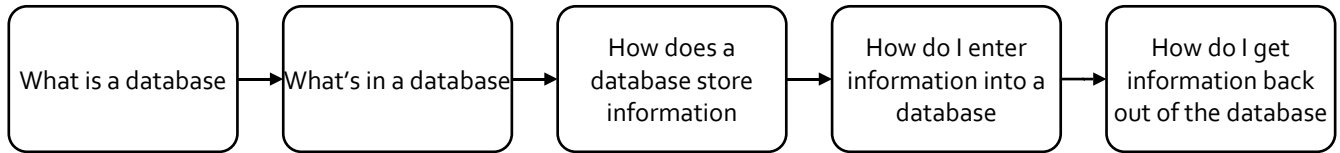
Only use Browse mode to start [Fig 1-8]. That's the mode that you are in by default, where you are right now. Browse mode is where you add records, view records, and edit them.

Don't worry about finding and sorting records, you will find out how to do that later.

Basic Roadmap

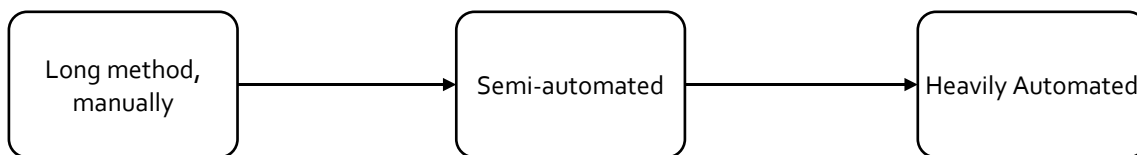
Choose your own order, according to how comfortable you are with the items shown.

Top Level



You will never do any more with a database than this. *How* you do it will change dramatically over the course of your evolution. Once you know how to use a database, you will then want to learn how to extend it, this is the natural progression. Jumping straight into developing will just extend your learning curve, and most likely create frustration.

Basic Evolution



Everything is manual entry

Every field requires some user input

Almost every field in your table will be used for data entry

Very few UI fields

Few scripts, if any at all.

Very few functions of FMP used.

Solution is not intuitive, so more training is needed.

Scarce use of calculation fields

Possibly just one or two tables being used

Start to use Auto-enter fields, lookups

More fields in the table are used for UI

Several scripts in use

Use of dynamic data

Perhaps using tabs and web viewer in some way

Far more use of calculations and functions

Several related tables

Start using plug-ins

UI tables in use

Layouts become intuitive

Keyboard time dramatically less but data input rate is much higher

Much larger solutions

Separation of tables and UI, and maybe more than one data file.

Writing custom functions

Portable DRY scripting

Significant use of dynamic data

Plug-ins are a core part of the solution

This is a very high level view of just *some* of the evolutionary aspects that you will go through. Do not worry about this right now, but you might want to reference it at some point down the path.

Of course, each one of the points listed above have an evolutionary cycle of their own. As you learn, you will naturally apply that learning. In fact, you will apply it to such an extent that you will need to back it off before your solution is crammed with features, buttons and all manner of useless usefulness.

You will duplicate, hybridise and lose track of half the stuff you are doing. That's natural, I won't tell you not to do it because it's actually a good learning curve. But at some point you'll need to make major revisions.

Finally, A Few Basic Rules

- At some point you need to invest some time into learning. So you might as well do it up front. You will never stop learning and applying, but get the basics right first.
- Use the help files, skip bits you don't understand. When you start to develop for real, the starter solutions will fill in the gaps.
- Once you've learned how to make something similar to the starter solutions you will be ready to move up a gear. Just start by cannibalising the starter solutions, when you are confident enough to make your own solution from scratch, then create a new database.
- Remember the phrase: *Don't Repeat Yourself (DRY)*. When you repeat yourself, it's one more thing to modify every time you make a change. Look into DRY techniques on the internet.
- Don't try and make a World beating solution at first. Spend a good amount of time learning and applying. I'm not saying don't make solutions for use, you should get your first solution into use as soon as possible - and then improve it with every iteration - that doesn't mean make it bigger.
- Learn about ***naming conventions*** early on. You won't find information within FMP about this, but you will if you look on the forums or just Google it. Develop a naming convention early on, then refine it. This will make your development easier for you and others to understand, when working on your solution.
- Learn scripting as soon as you can, use the starter solutions to help you. When you start to dig into scripts, this is probably the right time to start looking on the forums.
- Custom functions, use them only after you know how to achieve the same thing the long way. Most custom functions can be constructed within your tables using fields, calculations and scripts.
- Becoming more advanced isn't a stage, nor a milestone. You'll notice that you are good at one particular thing, it might be scripting or making nice layouts, for example. Gradually, everything you do will get better. You won't wake up one day and suddenly be intermediate level skilled - that's a myth. Within a few weeks you will be intermediate skilled at something within FMP, and even when you are Advanced at other things, you will still be a novice at others.
- Try to approach your project(s) by controlled change. Don't try to apply every new snippet of knowledge at one time. Learn stuff continually, but apply it gradually, or be prepared to watch the sunrise many mornings in a row.
- Understand that you'll always have room for improvement. Criticism can be a good thing, but don't listen to it too much in the early days. If someone says there's a better way - it's a cop-out, there's always a better way - even for the top developers.
- Start small - and end smaller. This concept takes some grasping. But in effect you want to hone a minimalist mentality. Features are great until they need to be modified or combined. Try to get into the habit of taking one-thing out when you add one-thing in. When you start to use custom functions this will help.
- Keep your tables as lightweight as possible. Fields are overhead, they add weight, keep nimble and light and fields to a minimum.
- Use dynamic data wherever possible. Dynamic just means less user interaction is required, less clicks, less searches and more efficient. It's a concept that will dawn on you one-day, until then - don't worry.
- Make everything re-usable and avoid duplication.

- A lot of FMP is relatively easy to learn and apply. Once you learn *how to learn* from the help files, you will be able to solve most things. My only advice is that you don't need to follow the order of learning in the help files if you don't want to - just skips some bits if you don't *get it* yet.
- There is normally more than one way to achieve something in FMP, and often three or four ways to accomplish something. You will find your way, but you have to persist, being a quitter won't make your solution work - just being frank.
- Quite early on, develop a tracking method to make note of what needs to be done, or what has been done. This will be invaluable to you personally as you learn, later it will become less so.
- Say "No" to everything, just be prepared to have more conversations because of saying *No*. *No* starts conversations, *Yes* ends conversations, but *Yes* also creates a ton of work, for you.

About the Author:



This is me, Darren Lunn. I'm a self-taught FileMaker Pro Developer.

I split my time between running three small businesses and developing FileMaker Pro solutions.

I've been developing in FileMaker Pro for more than ten years. I've got lots of bad habits, my aim is to make sure you get off on the right path in your FileMaker Pro development.

My articles are intended in plain English, if you think they aren't - tell me.

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