

# FileMaker Pro 4.0 for Windows

Easy information management -- from desktop to the web

## TRIAL SOFTWARE GUIDE

FileMaker Pro 4.0 is the database software program that has both the power and flexibility to handle all your everyday home and business functions. From preparing invoices, mailing lists, purchase orders and reports to inventory management and project tracking, FileMaker Pro software gives you the power to accomplish even your most complex data management tasks.

With its new web features, FileMaker Pro 4.0 becomes the easiest way to manage information -- on your desktop, across a network, or over the World Wide Web. FileMaker Pro databases are accessible to ordinary web browsers; you don't need to have a web server or to write HTML code. Authorized users can even edit, delete, and update records.

Whether you are a first-time database buyer or an advanced user, FileMaker Pro can help make you productive in minutes. FileMaker Pro puts you in control -- giving you easy access to sophisticated features without having to learn complex programming skills.

## Using this Guide

This Guide uses an interactive approach to show you why FileMaker Pro is the database for the real world. To see how FileMaker Pro can help make you productive in minutes, follow the steps in this Guide to explore the relational and web features of FileMaker Pro 4.0. See how easy it is to:

- use templates to create new files
- set up a relationship between files
- work with related fields and portals
- merge information
- create mailing labels
- format text paragraphs
- publish FileMaker Pro databases on the web\*

**Note** This trial version of FileMaker Pro 4.0 is limited in the following ways:

- You can create a maximum of 50 records.
- You won't be able to import graphics.
- When you print, a banner with the words "FileMaker Pro" appears in the background of each page.
- You won't be able to share files across a network.
- The onscreen Help, spelling checker, and tutorial files are not included, and only some of the templates and examples are included.

All of these items are included with the retail version of FileMaker Pro 4.0.

## Using templates to create files

A quick way to create a database file is to modify an existing template file. FileMaker Pro 4.0 includes many useful business, educational, and home templates. In the following steps, you'll be using templates that contain example data. You can modify the templates to contain your own

data.

#### **To work with the FileMaker Pro templates:**

1. Start the FileMaker Pro 4.0 Trial by choosing **Programs**, then **FileMaker Pro 4.0 Trial** from the Start menu.
2. In the New Database dialog box, click **Create a new file using a template**.
3. Choose **Business** from the drop-down menu, select the template file set **Task System**, and then click **OK**.
4. Click **Save** to save the file set.  
Make sure you're saving the files to the FileMaker Pro 4.0 Trial folder. FileMaker Pro copies and opens each of the files (Choices, People, ToDo) in the set.

#### **To create a record:**

1. In the ToDo file, click the **New Record** button to create a new To Do item.  
If the ToDo file is not visible, bring it to the front by selecting **ToDo** from the Window menu.
2. Select **01 Davidson, Julie** from the **Contact ID** pop-up menu.  
The related information fills in automatically.
3. Press Tab twice to move to the Time field and type **9:00**.
4. Finish filling out the To Do item by tabbing to the Item field and typing **Call Julie's agent, RE: Closing**.
5. Click the **Return** button to switch to the People file.

You see Julie's record in the related file, People. The new task appears in the To Do Items list.

## **Exploring a relational database**

When you connect files based on common fields, you create a relationship between two files. Relationships let you share data among files without having to duplicate the data in each file.

#### **To view a relationship:**

1. In the People file, choose **Define** from the File menu and then choose **Relationships**.  
In the Define Relationships dialog box, notice that the People file is related to the ToDo file by the common field Contact ID. People is also related to the Choices file.
2. Click **Done**.

#### **To insert a related field on a layout:**

1. Choose the **Form 2** layout from the layout pop-up menu in the status area (in the upper-left corner of the screen above the book icon).
2. Choose **Layout** from the Mode menu to switch to Layout mode.
3. Click the field tool (in the status area) and drag a new field into the blank area just under the "To Do List" section.

4. In the Specify Field dialog box, choose **ToDo** from the relationship drop-down list. This displays a list of the fields in the ToDo file.
5. If the **Create field label** option is checked, deselect it.
6. Click **::Item**, and then click **OK**.
7. Drag the field to make it wider (so that it is approximately 1/2 inch from the green borderline).
8. Choose Browse from the Mode menu to switch to Browse mode. You see the first To Do item for each contact. Using the book icon, scroll through several records to see the data change for each person.

### **Working with portals**

To see all the To Do items related to the People file, you can create a window, called a portal, into the data stored in the ToDo file. With a portal you see all of the To Do items for each contact, not just the first task entered.

#### **To create a portal to view all the To Do items:**

1. In the People file, choose **Layout** from the Mode menu.
2. Click the portal tool, and drag a new portal below the **::Item** field you previously added. The portal tool is next to the button tool on the tool panel and looks like a separated square. If you can't find it, use the layout pop-up menu to switch to the **Tools** layout, where you can see labels for the tools in the status area.
3. From the relationship drop-down list, choose **ToDo**.
4. Select the **Show vertical scroll bar** checkbox.
5. Select the **Alternate background with** checkbox, and then choose any color from the bottom row of colors on the first color palette.
6. Click **OK**.
7. Click the pointer tool and drag the **::Item** field into the top row of the portal.
8. Choose **Browse** from the Mode menu. You can now see all the To Do items for each contact inside the People file.
9. Scroll through the first 3 or 4 records to see a list of activities for each person.

### **Finding records and merging information**

You can search for specific information in your database by using Find mode. Use a find request when you want to locate records with specific data or work with a subset of records (for example, to print a found set records).

#### **To search for contacts interested in a specific neighborhood:**

1. In the People file, switch to the **Form View** layout using the layout pop-up menu.

2. Choose **Find** from the Mode menu.
3. Press Tab twice to move to the **Neighborhood Preference** field.
4. Choose **Coastside** from the list, choose.
5. Click the **Find** button.

The found set has 5 records.

**To send a letter to the contacts in the found set:**

1. Choose the **Letter** layout from the layout pop-up menu.
2. Choose **Layout** from the Mode menu.
3. Select the text tool from the tool panel.
4. Insert the cursor before the “n” in “neighborhood” in the second line.
5. Choose **Paste Special** from the Edit menu and **Merge Field** from the submenu.
6. Choose **People** from the Current File list.
7. Double-click the field **Neighborhood**, and then press the Space bar to insert a space after the merge field.
8. Select the merge field (including the << >> angle brackets), and make it bold by clicking the **B** on the text ruler.  
If the text ruler is not displayed, choose **Text Ruler** from the Show menu.
9. Choose **Browse** from the Mode menu to see the letter with the merged information.

## **Creating mailing labels**

In FileMaker Pro 4.0, mailing labels are easier than ever to create. The People file includes a special layout for mailing labels.

**To create mailing labels:**

1. In Layout mode, choose **New Layout** from the Mode menu.
2. In the New Layout dialog box, choose **Labels**.
3. Type **Mailing Labels** in the Layout Name box.
4. Click **OK**.
5. In the **Use label measurements for** drop-down list, choose **Avery 5160**. If you don't see the Avery 5160 labels, choose **Avery 7160**.
6. Click **OK**.
7. In the Specify Layout Contents dialog box, you choose which fields will appear on the label. Double-click the **First Name** field to add it to the layout.

8. To add a space, press the **Space bar**.
9. Double-click the **Last Name** field.
10. Press the **Enter** key to move to the next line.
11. On the next line, double-click the Neighborhood field.
12. Add additional fields, or click **OK** to finish the label.
13. Choose **Preview** from the Mode menu to view the mailing labels. You see five labels (everyone found in the "Coastside" find request).
14. To see the completed mailing labels, choose the **Avery 5160** layout from the layout pop-up menu. If you don't see a layout named Avery 5160, choose **Avery 7160**.

You can print the labels by choosing Print from the File menu. Be sure to print **Records being browsed**.

## Formatting text

You can enter, edit, and format text in Browse, Layout, and Find modes, just as you do with word processing software.

### To change the formatting of a letter:

1. Choose **Followup Letter** from the layout pop-up menu.
2. Choose **Layout** from the Mode menu.
3. Select the text tool from the tool panel.
4. Select the text in the three bulleted items.
5. From the left side of the text ruler, drag the bottom indent triangle to 3/4 inches.
6. Drag the top indent triangle back to 1/2 inches to align the paragraph.
7. Choose **Browse** from the Mode menu to see the results.
8. To close the files, press Command-W four times.

## Publishing FileMaker Pro data on the web

With FileMaker Pro 4.0, you can publish your database on the World Wide Web -- without any additional software -- using FileMaker Pro Web Companion and your TCP/IP access. Your database can be viewed, edited, sorted, and searched by anyone who has web browser software and access to the Internet or an intranet network. Your file is available to anyone who has access to the World Wide Web.

There are two ways you can publish your database on the web using FileMaker Pro 4.0: Instant Web Publishing and Custom Web Publishing. Regardless of the method you choose, you'll need

to provide web users with the IP address of the machine hosting the FileMaker Pro 4.0 databases.

**To publish a database on the web, you must have:**

- A computer running Windows 95, Windows NT, or the Mac OS with an IP address on the Internet or an intranet. Internet connections are usually provided through an Internet service provider. If your company has an intranet, you can make your database available within your company or workgroup.
- FileMaker Pro 4.0 (for Windows or Mac OS) with the FileMaker Pro Web Companion and supporting files installed.

It is best if the computer running your FileMaker Pro database has a full-time dial-up, ISDN, T1, T2, or T3 connection to the Internet (or similar capabilities). Without continuous Internet access, you can publish a database on the web, but your database is only available while your computer is connected to the Internet.

**Configuring the Web Companion without an Internet connection**

To use the FileMaker Pro 4.0 Web Companion without an Internet connection, you can configure a Windows 95 computer to behave as if it were connected to a TCP/IP network -- even if you do not have a modem or Ethernet adapter. The following section explains how to do this.

**Important** Following these instructions will remove any network connection currently in place on your Windows 95 PC. If your PC is already connected to a network or to an ISP, carefully note your original configuration before making these changes. These changes are listed solely for the benefit of those who want to test the new Web features in FileMaker Pro 4.0 without having an actual network connection.

1. Open the **Network** control panel (in the Control Panels folder).
2. If you have any network adapter, network clients, or network protocols installed, remove them.
3. Click the **Add** button. Then, double-click the **Adapter** item in the menu.
4. Select **Microsoft** from the list of manufacturers.
5. Select **Dial-Up Adapter** from the right-hand menu, then click **OK**.
6. In the Network control panel, click the **Add** button again.
7. Double-click **Protocol**.
8. Select **Microsoft** from the list of manufacturers.
9. Select **TCP/IP** from the right-hand menu, then click **OK**.
10. In the Network control panel list, you should see both a Dial-Up Adapter and the TCP/IP protocol. If you see anything else, such as an IPX/SPX or NetBEUI protocol, remove it.
11. Double-click the **TCP/IP** protocol to edit its properties.
12. Specify the following settings.
  - Enter **10.10.10.10** as the IP address
  - Disable the WINS and DNS services
  - Enter **10.10.10.1** as the gateway.

13. Click **OK**.

14. Click **OK**, and restart your computer.

Now you're able to use your PC to test the Web features in FileMaker Pro 4.0. For example, you can open a database you've created in FileMaker Pro 4.0, and configure the Web Companion to share a database using Instant Web Publishing. To see what it looks like to a web user, open Microsoft Internet Explorer or Netscape Navigator, and type `http://10.10.10.10/` into the Address field. Your web browser should then connect to the FileMaker Pro 4.0 Instant Web Publishing feature.

### **TCP/IP port numbers**

By default, FileMaker Pro 4.0 uses the TCP/IP port number ordinarily assigned to http (port 80). However, if you already have a web server running on your computer, and you want to use the Instant Web Publishing feature, you must set FileMaker Pro 4.0 to use an alternative TCP/IP port number. Claris has reserved port number 591 with the Internet Assigned Numbers Authority (IANA) for this use, and we recommend you choose port number 591 in the Web Companion Configuration dialog box if port number 80 is already in use.

## **Introducing Instant Web Publishing**

FileMaker Pro Instant Web Publishing lets you publish your database on the web quickly and easily. You do not need to change your database, use any additional software, or design web pages. You can control what web users can do in the database, for example, viewing, adding, editing, deleting, searching, or sorting records. Depending on how you've set up Instant Web Publishing, web users can see different views -- or HTML pages -- for working with data in your database:

- a Table View, for working with several records at a time
- a Form View, for working with one record at a time
- a Search page, for finding data that matches criteria you type
- a Sort page, for sorting records (if you enabled sorting when you set up the views)

### **Accessing a database on the web**

When web users type the IP address of the machine publishing a FileMaker Pro 4.0 database on the web, they see an automatically generated home page that has links to the databases. Detailed help is available to web users who click the Help (?) button on the web page. If you are familiar with HTML editing, or have HTML editing software such as Claris Home Page 3.0\*\*, you can create a personalized home page to be used with Instant Web Publishing. You must include a hyperlink with the IP address of the computer where the database you want to publish on the web is open.

The following steps show you how to publish the ToDo database on the web. By modifying and then publishing the ToDo database on the web, you'll be able to enter new tasks in it from any web browser.

### **To publish the ToDo database on the web using Instant Web Publishing:**

1. Choose **Preferences** from the Edit menu, and then choose **Application**.
2. In the Application Preferences dialog box, choose the **Plug-Ins** tab.
3. Select the **Web Companion** checkbox.

Now web sharing is available for any database you open. The following steps 4-7 apply to any

database you want to publish on the web.

4. Open the ToDo database (or bring it to the front by selecting it from the Window menu).
5. Choose **Sharing** from the File menu.
6. In the Companion Sharing area, select the checkbox next to **Web Companion**.
7. Click **OK**.

**Note** You must have **Export records** access privileges to publish a database on the web.

#### **To choose which fields are displayed:**

1. In the File Sharing dialog box, click the **Set Up Views** button.
2. Choose a view from the tabs to set up which fields appear in that browser view.

In general, choose layouts that contain the fields you want displayed in the web user's browser. Selecting a layout does not display that layout in the browser -- it only indicates which fields you want displayed in the browser.

Choosing **All Fields (no layout)** displays all fields in the database (but not related fields).

## **Introducing Custom Web Publishing**

Although FileMaker Pro Instant Web Publishing provides you with a quick and easy way to publish your database on the web, you are limited in what you are able to do and in the appearance of the interface. To have much more control over how your data is published on the web, use Custom Web Publishing.

With Custom Web Publishing, you create *format files* in an HTML editing application and use the FileMaker Pro CDML Tool to add Claris Dynamic Markup Language (CDML) tags.

If you want to have format files created for you, use the FileMaker Pro Connection Assistant feature in Claris Home Page 3.0\*\*. Otherwise, you must have web page authoring software such as Claris Home Page 3.0\*\* and an understanding of HTML and CDML.

### **Custom Web Publishing -- an overview**

The following is an overview of the minimum steps required to publish your database on the web using FileMaker Pro Custom Web Publishing:

1. Create the database or open an existing database.
2. Use the CDML Reference and the CDML Tool (available in the retail version of FileMaker Pro 4.0) to create format files in a web page authoring application such as Claris Home Page 3.0\*\*. The CDML Tool organizes CDML tag syntax, which can then be pasted into an HTML editing application.
3. Make sure FileMaker Pro Web Companion is enabled in the Application Preferences dialog box.
4. If you're not using it for other databases, disable Instant Web Publishing in the Web Companion Configuration dialog box.



5. Change the home page from **Built-In** to one that contains a hyperlink to your database(s).
6. For the database that you want to publish, enable **Web Companion Sharing** in the File Sharing dialog box.

### **Hosting the Guest Book web solution**

The Guest Book solution provides an example that allows web users to add records in the Guest Book.fp3 FileMaker Pro database using the **gb\_new.htm** format file. When a record is added successfully, the **gb\_sum.htm** format file provides feedback, letting web users know that their record has been added. The **gb\_err.htm** format file notifies web users if the record could not be added. In addition to these three files, the solution includes a home page, **default.htm**, which contains a link to the **gb\_new.htm** format file, and image files.

#### **To publish the Guest Book.fp3 database file on the web:**

1. Verify that the FileMaker Pro Web Companion is enabled in Application Preferences.
2. Open the **Guest Book.fp3** database, located in the Web folder inside the FileMaker Pro 4.0 folder.
3. Choose **Sharing** from the File menu.
4. In the Companion Sharing area of the File Sharing dialog box, select the checkbox next to **Web Companion**.
5. Click **OK**.

#### **To specify which home page the Web Companion uses:**

1. Choose **Preferences** from the Edit menu, and then choose **Web Companion**.
2. In the Web Companion View Setup dialog box, click **Configure**.
3. For **Home Page**, choose **default.htm**.
4. Click **OK**.

Any HTML file located in the Web folder inside the FileMaker Pro 4.0 folder can be specified as the Home Page. Your home page must provide links to format files that interact with the FileMaker Pro 4.0 database files.

For more information on Custom Web Publishing, visit the FileMaker Pro web site: [www.filemaker.com](http://www.filemaker.com).

### **Benefits of using FileMaker Pro**

- Publish your databases on the web
- Get started easily
- Access and manage data with powerful tools
- Make data look the way you want
- Share information easily and securely

## **Publish your databases on the web:**

**Instant Web Publishing** Built-in HTTP support lets authorized users search, edit, delete, and update FileMaker Pro records using today's most popular web browsers. You don't need to write HTML code or have a separate web server!

**Custom Web Publishing** Using the built-in CGI capabilities of FileMaker Pro 4.0, connect your databases to web pages in order to collect custom information and share data with visitors to your web site.

**Integration with Claris Home Page 3.0** Design custom web pages that interact with FileMaker Pro 4.0 databases via the FileMaker Connection Assistant in Claris Home Page 3.0.\*\*

**Integrate Multimedia** Enhance your custom web solution by incorporating JPEG and GIF images, animated GIF images, AIFF sound files, QuickTime movies, and Java applets into HTML pages served by the FileMaker Pro 4.0 Web Companion.

## **Get started easily:**

**Web Templates** Use the Shopping Cart, Guest Book, Employee Database, and instructional HTML templates to collect and share information over the Internet.

**Professional Solutions** Get started quickly with solutions for business, education and home -- including invoicing, mailing lists, contact management, project tracking, inventory management, school records, and more.

**Microsoft Excel File Conversion** Turn many versions of Microsoft Excel spreadsheets into fully functional FileMaker Pro databases quickly, then manipulate the data in ways not possible with a spreadsheet program.

**Versatile Data Import** Automatically create FileMaker Pro databases using raw data from spreadsheets, word processors, and other databases.

**Data Handling Flexibility** Add, change or remove fields, layouts and calculations at any time without rebuilding the database.

**Auto Indexing** Find records fast without the complexity of managing index files -- automatically indexes fields.

## **Access and manage data with powerful tools:**

**Relational Database Capabilities** Enter data just once, then use it anywhere by creating one-to-one, one-to-many and many-to-many relationships between files. Sort information from related databases.

**Data-Lookup Capabilities** Automatically copy and paste data between related files to avoid repetitive data entry.

**ScriptMaker** Automate routine tasks and menu commands -- anything from launching URLs, to dialing the phone, to sending email.\*\*\*

**Versatile Find Function** Retrieve only the information you need by specifying search parameters: range, less than, greater than, and/or/not, exact match, empty, duplicate, wildcard, or

literal. Search for an exact value in a field.

**Custom Field Formats** Accelerate data entry with customizable radio buttons, check boxes, pop-up menus and more -- even use data from related files.

**Automatic Data Entry** Save time by inserting the current date or time, specific text, serial numbers, calculated values, and other data.

**Built-in Spelling Checker** Eliminate spelling errors from records, reports, and layouts.

**More than 100 Calculation Functions** Streamline data entry, validation, and analysis with simple or complex calculations.

**User-definable Buttons** Easily customize the appearance and operation of your files with buttons you create in a single step.

## **Make data look the way you want:**

**Powerful Design Capabilities** Create compelling reports and forms with comprehensive built-in graphic tools. Rotate text, fields, and layout objects in 90-degree increments for a customized look.

**Drag-and-Drop Support** Design multiple layouts to enter, view and print information by simply dragging and dropping fields from the current file or related files.

**Multimedia "Container" Fields** Enhance your fields easily by integrating video footage, animations, sounds, still images stored in popular formats such as JPEG, and GIF, and other multimedia content.

**Mail-Merge Support** Create customized letters and other documents within FileMaker Pro -- no need to export data to a word processing program.

**Integrated Text Handling** Add up to 64,000 characters in any text field and use built-in word processing capabilities to format the font, style, tabs, indents, and so on.

## **Share information easily and securely:**

**Cross-Platform Compatibility** Share files seamlessly between Windows and Mac OS versions of FileMaker Pro 3.0 and 4.0 -- including concurrent users over your local area network, an intranet or the Internet.

**Instant Peer-to-Peer Networking** Convert a database into a networked solution in one simple step.

**Password Control** Allow authorized users to search, edit, delete and update records. Protect your data on the layout and field level.

**Automatic Record Locking** Ensure the integrity of your data in multi-user networked environments.

**Instant File Updating** Automatic updating keeps you current by reflecting changes made by any user accessing your database over a network.

For large networks of users, Claris also produces FileMaker Pro Server, client-server file sharing for faster multi-user performance. To license FileMaker Pro 4.0 or FileMaker Pro Server 3.0, call 1-800-544-8554 in the US, 1-800-361-6075 in Canada, or talk to a Claris reseller near you.

## **Claris**

### **Simply powerful software**

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\* FileMaker Pro web functions require access to the Internet via an Intranet or an account with an Internet Service Provider, and requires Windows 95 or Windows NT.

\*\* Claris Home Page software sold separately. Please visit the Claris web site for Claris Home Page 3.0 software's future availability: [www.claris.com](http://www.claris.com).

\*\*\* Requires URL, DLL, MAPI-compliant email software.