

FileMaker Essentials

Turn Everyday Data into Useful Apps

FA-0820 · 1 day

Software Development · Automation, RPA & Power Platform

Build a practical desktop application, organise information and simplify everyday tasks.

Introduction

Information is easier to work with when it has a clear structure, a convenient entry screen and a reliable way to find what matters. Claris FileMaker Pro brings these elements together, allowing users to create custom desktop applications through visual tools, layouts and built-in functions.

This hands-on foundation course introduces FileMaker in an approachable, practical way. Participants build a small desktop application while learning how to organise records, choose suitable fields, design forms and bring existing information into their database. They then add useful calculations, simple automation and a straightforward report. Each topic builds on the previous one, helping participants understand how the application works as they create it.

The course uses an active FileMaker Pro trial and focuses on skills participants can apply to everyday work. Practical exercises build towards completing and understanding one small desktop application within a single day.

Learning outcomes

By the end of the course, participants will be able to:

- Create a desktop database with suitable tables, fields and records.
- Design clear forms and list layouts for everyday use.
- Import, find, sort and export data.
- Add simple calculations and button-driven automation.
- Produce a straightforward report and PDF output.
- Protect access to their application and create backup copies.

Prerequisites

- Comfort using desktop applications, managing files and working with spreadsheet-style data.
- A laptop running a Claris-supported Windows or macOS version and meeting FileMaker Pro's system requirements.
- An active FileMaker Pro trial installed before training.
- Unrestricted internet access.

Training outline

1. 1. Getting Started with FileMaker Pro

1. Custom applications and everyday data management
2. FileMaker Pro interface and operating modes
3. Creating and opening a FileMaker file

2. 2. Building and Organising a Database

1. Tables, fields and records
2. Field types and unique record identifiers
3. Data validation and automatic field entries
4. Introduction to table relationships

3. 3. Designing Clear Data Entry Screens

1. Form and list layouts
2. Field placement, labels and formatting
3. Dropdown lists and value lists
4. Layout navigation

4. 4. Working with Data and Reports

1. CSV import and field matching
2. Adding, editing and deleting records
3. Finding records and sorting results
4. Simple reports, printing and PDF output

5. 5. Simplifying Everyday Tasks

1. Calculated fields and simple functions
2. Basic scripts
3. Buttons and script execution

6. 6. Protecting and Managing the Application

1. User accounts, passwords and access permissions
2. Saving copies and desktop backups
3. Exporting data to CSV

Disclaimer

This outline serves as a training guideline. The trainer reserves the right to amend the content, sequence or emphasis without prior notice to reflect participant needs, available software and the practical requirements of delivery.