

FileMaker Level 3 Cheatsheet

Shortcuts

Shortcut	What It Does
CTRL + B or ⌘ + B	Browse Mode (For editing, browsing records)
CTRL + F or ⌘ + F	Find Mode (for searching records)
CTRL + L or ⌘ + L	Layout Mode (For designing the look and feel of your database or reports.)
CTRL + U or ⌘ + U	Preview Mode (Print Preview, PDF Export and Excel Export)
CTRL + R or ⌘ + R	Modify the last find
CTRL + N or ⌘ + N	New Record
CTRL + D or ⌘ + D	Duplicate Record
CTRL + E or ⌘ + E	Delete Record
CTRL + J or ⌘ + J	Show All Records
CTRL + S or ⌘ + S	Sort Records
CTRL + O or ⌘ + O	Open a New Database
CTRL + W or ⌘ + W	Close a Database
CTRL + Z or ⌘ + Z	Undo
CTRL + A or ⌘ + A	Select All
CTRL + M or ⌘ + M	Insert a Merge Field
CTRL + T or ⌘ + T	Omit a Record
CTRL + I or ⌘ + I	Show/Hide Inspector in Layout Mode
CTRL - or ⌘ -	Insert Current Date
CTRL + SHIFT + D or ⌘ + SHIFT + D	Manage a Database
TAB	Move to the next field
SHIFT + TAB	Move to the previous field
CTRL + ↓	Move to the next record
CTRL + ↑	Move to the previous record
CTRL + TAB or Option + TAB	Puts a TAB character within a field.

between people and meetings, as a person can attend more than one meeting, and a meeting can have multiple attendees. The join table that resolves the many-to-many relationship is called **Participant**.

The goal of the following example is to create a script that sends an email with a PDF attachment (of a personalized agenda) to each participant in a meeting. In addition to the concepts introduced in this lesson, you will need to be familiar with material covered in Lessons 6.1 through 6.6, including conditional branching, error trapping, and use of the **Go to Related Record (GTRR)** script step.

Example 6.7.2

Open the file **06a_FTS_Meetings.fp7**.

1. Open the **Manage Scripts** dialog and create a new script named "**Email_Agendas**".
2. Begin the script with the following error trap, which tests to see if the current meeting does not have any participants:

```
If [ Count ( meeting_PARTICIPANT::__kp_Participant ) = 0 ]
  Show Custom Dialog ["Error"; "There are no participants for the
  current meeting."]
  Halt Script
End If
```

3. Add a **GTRR** step that jumps to the set of participants for the current meeting. The settings for the **GTRR** are shown in Figure 6.7.3. Opening a new window to work with the related records is not strictly necessary, but it is a common practice to use a window like this as a temporary workspace. The user never needs to see or interact with the new window, so its size and position are not crucial. You can even make it 1 pixel tall and 1 pixel wide, or use a negative number as the left or top setting to position it outside the visible workspace. At the end of the script, the window will be closed, leaving the user's original window context completely unaltered.

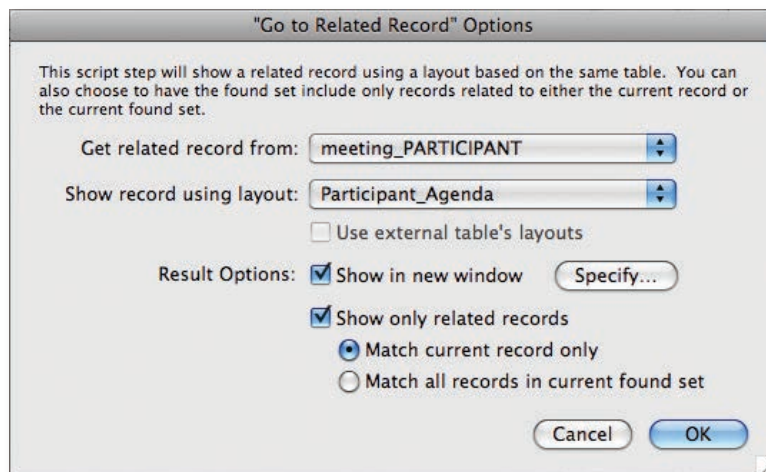


Figure 6.7.3

4. Set up the outline of a routine to loop through the set of **Participant** records by adding the following steps to the script. For now, you can see that a comment has been added where the PDF generation and email will be added. Note also that while the **Go to Record/Request/Page [First]** step is not necessary (the **GTRR** will leave you on the first record), it is included here as extra insurance. There is no harm to include it; and should you ever alter the routine, it could avoid issues.

Go to Record/Request/Page [First]

Loop

this is where the PDF generation and email will happen

Go to Record/Request/Page [Next; Exit after last]

End Loop

5. Within the loop, in the space where the comment is, add a **Set Variable** step to create a variable as the file path for a PDF of the personalized meeting agenda. For the purpose of this exercise, use the participant's full name as the file name.

Set Variable [\$fileName; Value: "file:" & Get (DesktopPath) & participant_PERSON::NameLastFirst & ".pdf"]

6. Similarly to Example 6.7.1, add a **Save Records as PDF** script step for writing out the current record as a PDF file, using a file path/name determined by the **\$fileName** variable.
7. Add a **Send Mail** step to the script. The options to use are shown in Figure 6.7.4. Notice at the bottom of the dialog that you can specify a file attachment for the email. Use the same **\$fileName** variable to reference the PDF created in the previous step.

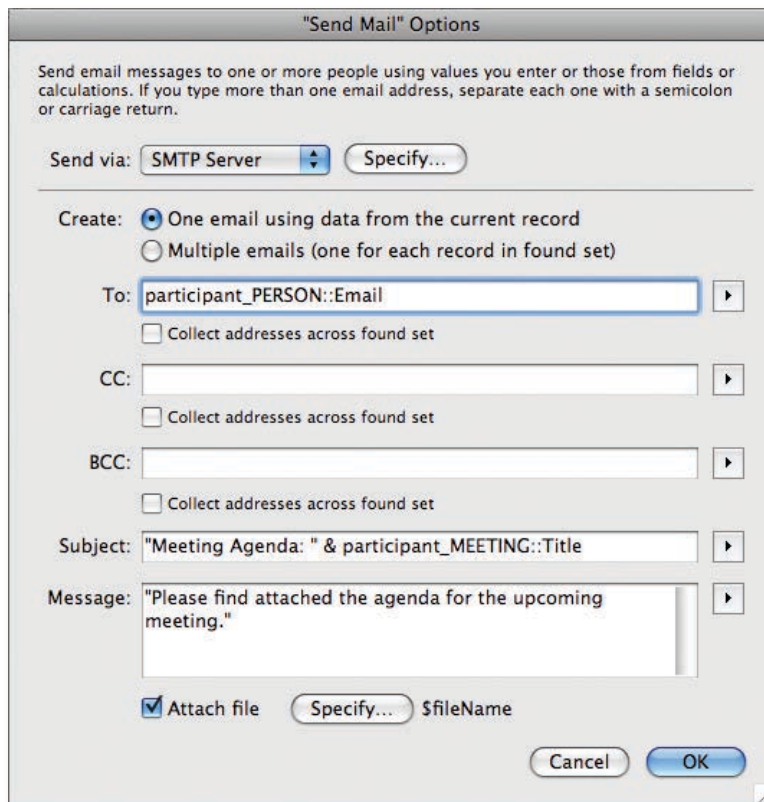


Figure 6.7.4

A new **Send Mail** option in FileMaker Pro 10 is the ability to send email via an **SMTP Server**. Previously, the only option was to utilize the email client of the user. Figure 6.7.5 shows the **SMTP Options** dialog. Configure this as you would the settings for an email account. If you do not have SMTP configuration options at hand, choose **E-mail Client** as the **Send via:** option.

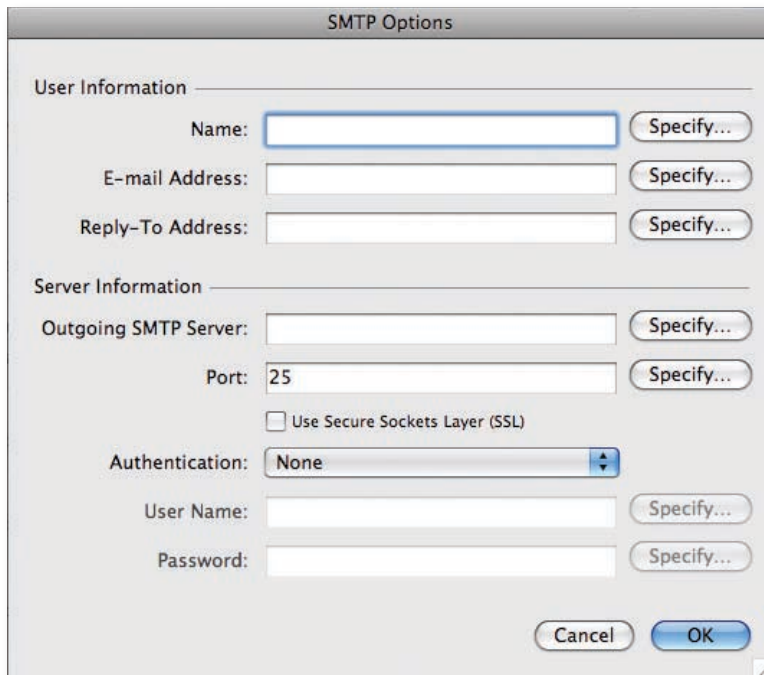


Figure 6.7.5

8. Beneath the **End Loop** step, insert a **Close Window [Current Window]** step into the script. As mentioned previously, this will close the window opened up by the **Go to Related Record** step, thereby returning users to their original window context.
9. Save and exit the script and close the **Manage Scripts** dialog.
10. Navigate to the **Meeting_Detail** layout, enter **Layout** mode, and add a button to the layout that triggers the **Email_Agendas** script. Test and debug the script until it works as expected.

Additional Tips

Delete files using Export Field Contents

In a script routine like that in Example 6.7.2, you will end up with a lot of documents strewn on the user's workstation. Files can in fact be deleted using the **Export Field Contents** script step. That step is typically intended to output the contents of a single field from a single record, such as when you want to retrieve the contents of a container field. However, if you specify a file path/name for output (either explicitly or by a variable reference) and do not select a field to export, that file, if it exists, will be deleted from the user's workstation. An error code is returned (**102, Field is missing**), but you may disregard it.

In Example 6.7.2, by adding the following script step after the **Send Mail** step, you can "clean up" after yourself by removing the PDF email attachment.

```
Export Field Contents ["$fileName"]
```

Email_Agendas

#

If [Count (meeting_PARTICIPANT::__kp_Participant) = 0]

Show Custom Dialog [Title: "Error"; Message: "There are no participants for the current meeting."; Buttons: "OK"]

Halt Script

End If

#

Go to Related Record [From table: "meeting_PARTICIPANT"; Using layout: "Participant_Agenda" (PARTICIPANT)]

[Show only related records; New window]

#

Go to Record/Request/Page

[First]

Loop

Set Variable [\$fileName; Value:"file:" & Get (DesktopPath) & participant_PERSON::NameLastFirst & ".pdf"]

Save Records as PDF [File Name: "\$filename"; Current record]

[*Document* - Compatibility: Acrobat 5 and later]

[*Pages* - Number Pages From: 1; Include: All pages]

[*Security* - Printing: High Resolution; Editing: Any except extracting pages; Enable copying; Enable Screen Reader]

[*Initial View* - Show: Pages Panel and Page; Page Layout: Single Page; Magnification: 100%]

[Restore; No dialog]

Send Mail [Send via E-mail Client; To: participant_PERSON::Email; Subject: "Meeting Agenda: " & participant_MEETING::Title; Message: "Please find attached the agenda for the upcoming meeting."; Attachment: "\$fileName"]

Go to Record/Request/Page

[Next; Exit after last]

End Loop

#

Close Window [Current Window]

FileMaker 9 Tip#1: Hiding Something on the Layout

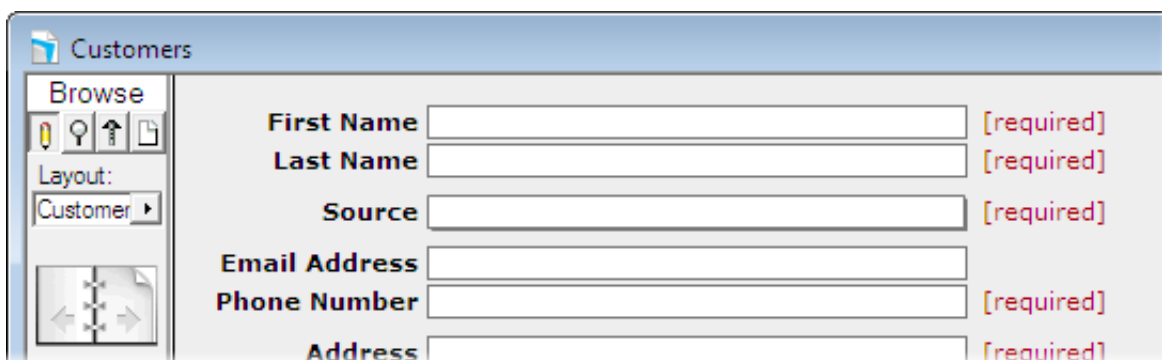
7-10-2007 by Geoff Coffey

One of the most exciting new features in FileMaker 9 is Conditional Formatting. I think this is awesome because now you can apply dynamic custom styles to layout elements without adding dozens of cruffy unstored calcs to your table. When I first started playing with conditional formatting, though, I felt a little let down by one thing: There's apparently no way to make something disappear using conditional formatting. I often have the need to show something to my user — an informational message, indicator icon, or even a button — only under certain conditions. It turns out that with some creative thinking, you can show and hide layout elements with conditional formatting. (Some restrictions apply.)

This is actually two techniques in one. The solution is simple if you're only trying to hide some text. If you have a graphic, button, or collection of objects to hide, on the other hand, you'll use a different method.

Making Text Disappear

To make some text disappear — an informational label by a field, or a warning message that doesn't apply, for example — simply change the text color to match the background color. For example, suppose you have a database that looks like this:



The screenshot shows a FileMaker layout window titled "Customers". On the left is a navigation pane with "Browse" and "Layout: Customer" options. The main area contains a form with the following fields and labels:

First Name	<input type="text"/>	[required]
Last Name	<input type="text"/>	[required]
Source	<input type="text"/>	[required]
Email Address	<input type="text"/>	
Phone Number	<input type="text"/>	[required]
Address	<input type="text"/>	[required]

You want the little "[required]" label next to a field to disappear when your user enters something in the field. This is a breeze:

1. Select the text label and choose Format -> Conditional.
The Conditional Formatting for selected objects dialog box appears.
2. Click Add.
FileMaker adds a new line to the Condition list. In other words, you're establishing a condition under which you want special formatting applied to this object.

3. Click Specify and enter this calculation: `not IsEmpty(Customers::First Name)` in the Specify Calculation window.

In this case, you want to format the label when the First Name field is not empty. When the formula you entered evaluates to a `true` value, the formatting will be applied.

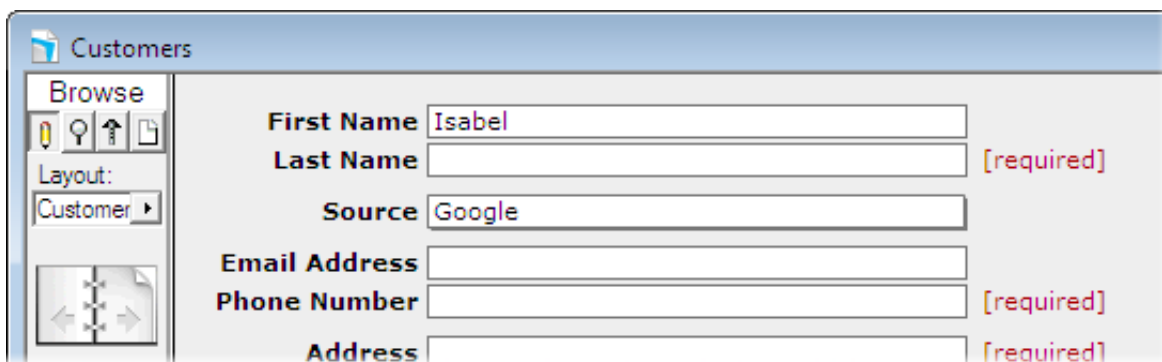
4. Click OK to close the Specify Calculation dialog box.

Now you need to tell FileMaker what kind of formatting to apply.

5. Turn on the Text Color check box and pick an appropriate color from the rainbow-colored pop-up menu beside it.

Choose a color that matches your background color exactly. In the picture above, the background is FileMaker's lightest gray color, so I picked that color here.

When you're finished with these steps, click OK in the Conditional Formatting window and switch to Browse mode. Now as you enter information in the fields on the layout, the "[required]" reminders will disappear like magic:



Note: You could also make the text invisible on the layout, then use conditional formatting to make the object appear (by applying a visible color) when you want it to show. This might make the condition formula a little more obvious because it is expressed positively instead of negatively. But having invisible items on the layout is a nuisance. If you find it easier to write a formula saying when the text should appear, do that. Then put `not` in front of it. It's that easy.

Making Other Things Disappear

The technique above has a pretty serious limitation: it only works with a single text object. If you're dealing with a graphic (perhaps it is an icon that marks each unpaid invoice) or some other object, you're not going to make it disappear by turning it white. In fact, if you select most kinds of layout objects, the Format -> Conditional menu command dims: FileMaker can only apply conditional formatting to text objects, fields, buttons, and web viewers.

To work around this limitation, you have to get a little creative: Use an empty text object:

1. Using the Text tool in Layout mode, create a new text object (by clicking somewhere on the layout) and type a single space. Then click outside it so it's no longer expecting input. You now have a (mostly) empty text object that you can resize and position as you see fit. (You need the space because FileMaker will automatically delete the text object if you make it completely empty.)
2. Position this text object over the element or elements you want to hide.

You may need to resize it so it covers the item completely. Also, make sure it is in front of the item it is hiding (use Arrange -> Bring to Front if necessary).

3. Choose Format -> Conditional and apply conditional formatting just like you did in the previous example.

This time, though, turn on the Fill Color check box instead of Text Color. You should still choose a color that matches the background.

When you're finished, switch to Browse mode and give it a try. When your formatting condition is met, everything under the text object will disappear.

Dealing with Buttons

The first gotcha with this technique is that although you hide an item from view, you don't hide it from the mouse. If the thing you're covering up is a button, it will still be clickable even when hidden. Luckily, this is easy to fix: Just modify the button's script so it does nothing when the button is hidden. Add a snippet of code like this to the top of your script:

```
If [ IsEmpty(Customer::Email Address) ]  
    Exit Script  
End If
```

The formula in the `IF` step should match the one you used in the Conditional Formatting dialog box exactly. Now, although the button is clickable, it won't do anything. And since you can't see it, you won't be inclined to click it anyway. Problem solved.

Other Limitations

Buttons aren't the only layout objects that present a challenge. Fields can also be entered even when hidden. In fact, fields are even worse: You can tab into them without clicking at all. They show dotted field frame outlines when you click in a blank spot on the layout. And they sometimes show their information right over the top of your carefully placed coverup. In general, this technique is not suitable for hiding fields. Same goes for Tab controls and Web Viewers.

Finally, sometimes the color behind the thing you're trying to hide is not consistent. The most typical example is a portal with alternating background colors. In a case like this, there's no straight forward way to decide what color the empty text object should take on when it comes time to hide.

These limitations aside, this technique provides a simple way to add more dynamic behavior to your user interfaces without complicating the underlying data model. That's almost always a win in my book.

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18 Comments



1. Jesse Barnum

Highlight the active field with conditional formatting



by [Chad Novotny](#) on Mar 11, 2010, filed under: [Tips & Tricks](#), [Advanced Techniques](#), [Downloads](#)

This is one of my favorite tips, which we first published in August 2007 when conditional formatting was introduced in FileMaker Pro 9. A not-uncommon request we've received over the years is to highlight the current field with something more than slightly darker field borders. Conditional formatting seems the perfect answer: there must be a way to change a field's background fill from its default to another color on entering the field, right?

Turns out... no. You cannot use conditional formatting to change a field's fill color on entering it. It's just not possible. Never. Conditional formatting does not work in any way whatsoever while focus is in the field in question. And that's when the epiphany struck.

Instead of trying to change a field's fill from the default to another color on gaining focus, make the default color of every field the color it should have on entry. Yes, that's right, if you want fields to turn yellow when a user tabs to the field, make them ALL yellow in Layout mode. Now, use conditional formatting to change their color when they do not have focus. Select all your fields, and apply the following conditional formatting rule: set the fill color to white under the condition "Formula is..."



That's it (and how's that for a complicated calculation formula?). Now, whenever the field does not have focus, the conditional formatting is tested, the formula will evaluate as true (of course), and the unfocused field will have its "default" white fill. On entering the field, the conditional formatting disappears and the field turns yellow.

[Log in](#) or register to download the sample file.

Ed Roseman 05/10/2010	Very cool and ingenious. Thanks. But I'm scratching my head trying to figure out what the "True" is "truing" about. WHAT is true? I'm sure this is a contracted paraphrase of some other command or logic, but what is it?
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Chad Novotny 05/11/2010	Thanks, Ed. Conditional formatting uses a logical test, such as "salary < 50,000", or "Self < Get (CurrentDate)", to decide when to apply the formatting. Each of these tests can result in either true or false. But True is always, well, true: the formatting is always applied. You could think of it as "1 = 1"; that's always going to be true. An even shorter way of writing "True" is the just the number "1". In fact, if you have a formula that's evaluates the word True (NOT in quotes, so as not to treat it as a string), you get the number 1. I just like to say True instead to be clear I'm talking about a logical value instead of a number; it's the way my mind works.
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Jim Liston 06/28/2010	Most excellent tip. Now, how about highlighting the whole record on focus. When in a list view, the only way to tell which record is being
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