



Tutorial for using CalSWEC Student Information System (CSIS) with FileMaker® Pro 11

Developed by Susan E. Jacquet, Ph.D.
Revised October 2013

2850 TELEGRAPH AVE., SUITE 215 • BERKELEY, CA 94705
(P) 510.642.9272 • (F) 510.642.8573 • (W) <http://calswec.berkeley.edu>

TABLE of CONTENTS

TRACKING RECORDS.....	3
MODE.....	4
LAYOUTS.....	4
FILE MENU.....	5
EDIT MENU.....	6
VIEW MENU.....	6
RECORDS.....	7
Sorting.....	9
Other ways to sort by a single field	9
Replacing Contents.....	10
FIND Mode	10
Using symbols in Find.....	11
Advanced Finds.....	11
SCRIPTS.....	12
USING CONTAINER FIELDS.....	12
Exporting Records.....	13
Save/Send Records as.....	14
TIPS AND SHORTCUTS.....	14
Entering New Student Data.....	14
Finding errors.....	14
Correcting Errors.....	15
Useful Keystroke Shortcuts.....	15

FileMaker Pro Tutorial

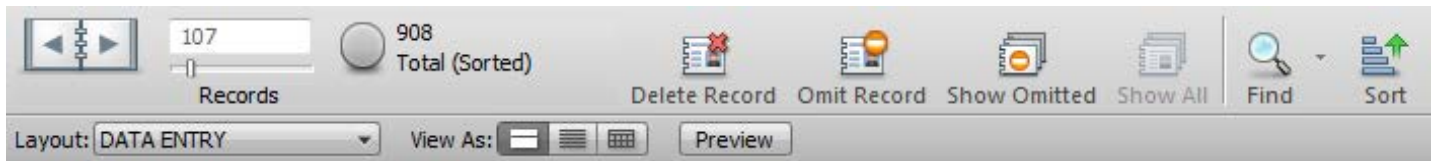
This tutorial is specific to the CSIS program but with a focus on using FileMaker© Pro 8.5. It is intended to aid all Administrative Support Staff in the CalSWEC program.

This tutorial will walk through all the icons and menus in FileMaker. Then uses examples to illustrate how the application works.

TRACKING RECORDS

Along the top of the screen is the Status Area, which provides information about the database including the current record, number of total records, function icons, current layout on the screen, the view of the layout.

“record toggle” “record #” “total records” “Delete” “Omit” “Show Omitted” “Show all” “Find” “Sort”



“Current Layout”

“View Toggle”

“Preview Toggle”

The “notebook” or “Record toggle” object allows the user to flip from record to record by clicking on the arrows. The right arrow goes forward to the next record, and the left arrow goes back to the previous record.

The record currently on the screen is 107 in this figure, and next to it is the Total number of records, 908 in this figure.

The slide below “record #” allows the user to move more rapidly through the records.

The function buttons: “**Delete**” “**Omit**” “**Show Omitted**” “**Show all**” “**Find**” & “**Sort**” are explained later.

Under the “notebook” is the word “Layout:” and a dropdown menu for the various layouts or screens available (see layout menu on the following page).

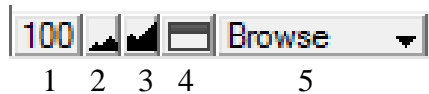
Note that “DATA ENTRY” is showing in the layout menu. That is the layout that would be visible on the screen. It contains all of the data required for each of the records in CSIS; and it is the layout most often used.

“**View as**” Toggles among 3 views: **Form** (one record at a time), **List** (one record after the other) and **Table** views.

The “**Preview**” Toggles in and out of Preview mode, which shows what the printout would look like.

MODE

The status bar at bottom of the screen has icons for changing views and functions (similar to the View menu).



1. Shows the percent of the screen size.
2. Zooms out
3. Zooms in
4. A toggle to display and hide the **Status Area** (The strip along the left side of the screen).
5. Pop-up menu for the Viewing modes:
 - a. **Browse** [CTRL] [B] (for entering data)
 - b. **Find** [CTRL] [F] (for searching)
 - c. **Layout** [CTRL] [L] (for modifying the layout)
 - d. **Preview** [CTRL] [U] (for print preview for printing)

LAYOUTS

The layouts used for the CSIS are in a menu below the Notebook. To display the menu of layouts or to switch to a different layout, click on the arrow to the right of the layout label above the notebook. New layouts can be created as need. There are now 2 MSW layouts:

1. **DATA ENTRY** – is a 3-tabbed layout with
 - a. Personal Tab
 - b. Academic Tab
 - c. Work and Repayment Tab
2. **Data entry-B** –Data Entry with optional fields.
3. **Student Information** - form to hand out for gathering new student information and Unique ID.
4. **Leave/Work/Payback update** - condensed version of the “Data Entry” layout with data pertaining to Leave, Termination, Employment, Repayment, and Notes.
5. **Fields - Personal** - Table format that contains student demographic and other background information.
6. **Fields – Contact Information** – Table of all contact info.
7. **Fields - Academic Data** - Table format that contains fields from the Academic data layout.
8. **Fields – Work/Repayment** - Table format that contains fields from Work/Repayment layout
9. **Leave/Work/Payback** - Table format that contains fields from Leave/Work/Payback layout.
10. **JOB SEARCH** – For monitoring graduate job searches.
11. **Avery 5160 Labels** -this layout generates address labels.



12. **Monitor by Status** - a report that lists all “Check work Status” and “Monitor” students and graduates. The layout includes: “Name” and “County Employee status” sorted by DONE Status.
13. **Monitor by Year** - similar to the report above but by Year of Entry in CalSWEC.
14. **All in Repayment** - a report of students to be monitored along with Repayment status and monies owed.
15. **Addresses** - a report of the contact info for students/grads.
16. **Expenses - 2 semesters** - an optional layout for use in entry of specific expenses and calculates totals for part-time students on the 2-semester system.
17. **Expenses - quarterly** - an optional layout for use in entry of specific expenses and calculates totals for part-time students on the quarter system.
18. **Expenses - monthly** - an optional layout for use in entry of specific expenses and calculates totals for part-time students on a monthly basis.
19. **Tracking Letters for Work Obligation** - Track letters sent to and received from Graduates.
20. **Tracking months of work** - Report of the months due and completed for each working graduate.
21. **Work/Payment Report** - a report of the current standing of all students and graduates by their “DONE” field status and the numbers of students and graduates in each category.
22. **Count by Status** - a report of the number of students and grads by their status.
23. **NOTES** - a report by student of entry and grad year, status, and NOTES section.
24. **Student/Graduate Information** - Student/Grad contact info, work or repayment info, and notes.
25. **Alumni Update Information** - Layout used for tracking alumni information.
26. **Current Enrollment summary** - A list of current students by Full/Part-time status.
27. **Graduates by First County of Employment** - Layout of graduates by their first County of employment.

FILE MENU

The **File Menu** is similar to that in other software.

The options are pretty straightforward and similar to those in most software applications.

New Database - for creating a new database (not used for CSIS)

New From Starter Solutions – unavailable on the Server

Open - Opens a file but not the files on the Server

Open Remote - opens a remote database (Use this for CSIS)

Open Recent - lists any files that have been used recently

Open Favorite – Opens the access to the server.

Close - closes a file

Manage - unavailable on the Server

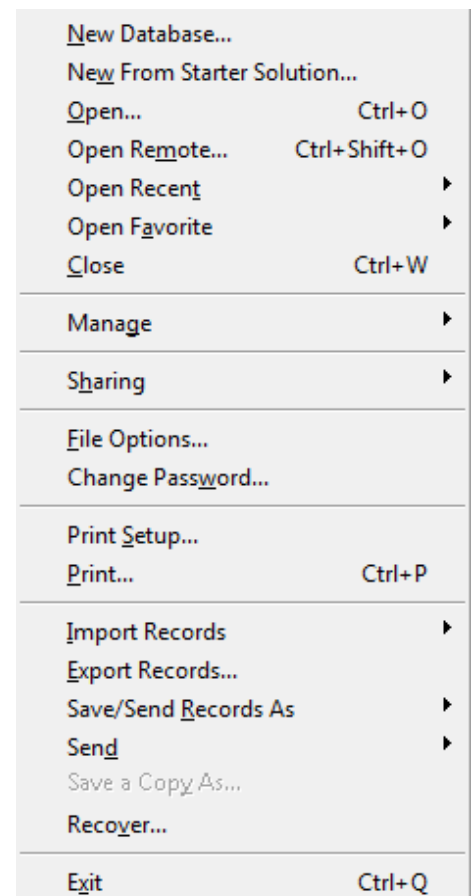
Sharing - unavailable on the Server

File Options - unavailable on the Server

Change Password - unavailable on the Server

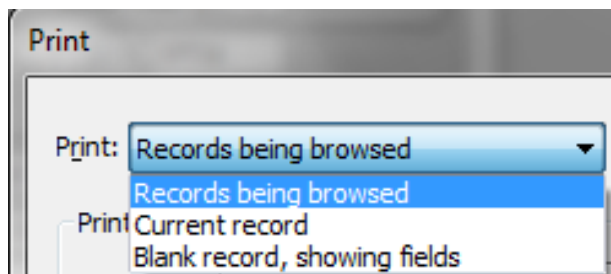
Print setup - sets up a print job

Print - prints records and screens.



NOTE: The **Print** command differs somewhat from the standard print commands.

At the top of the print Dialog box is a menu that determines whether you will be printing one record, multiple records, or a blank record.



- **Records being browsed** - prints all records that are showing.
- **Current record** - prints only one record the one that the cursor is on.
- **Blank record, showing fields** - prints only the format or layout, no data.

Import records - unavailable on the Server

Export Records - used to export data to another database.

Save/Send Records As - used for saving data to Excel or PDF format.

Send - transports data via email using the emails in any of the email fields

Save a copy as... - unavailable on the Server

Recover - unavailable on the Server (Contact Data Management Specialist, who will provide a backup)

NOTE: FileMaker© saves continuously so take care when entering data.

EDIT MENU

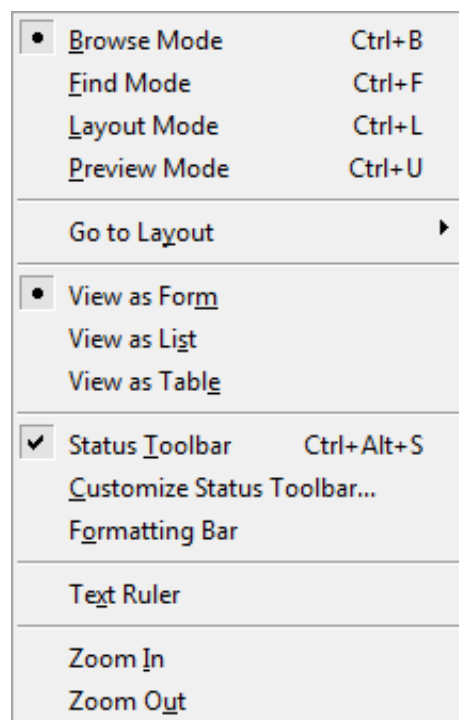
The EDIT commands are similar to those in most word processors. They would be used mostly for editing text that is entered into a field. Some of these will be touched on throughout the tutorial.

VIEW MENU

The **VIEW** menu at the top of the page lists a number of different views for each of the layouts. In the first group Browse is the mode used most often.

1. **Browse Mode** - used for data entry, and is used to enter or update information on the students
2. **Find Mode** - used for searching for a particular record or group of records.
3. **Layout Mode** – not available in the server.
4. **Preview Mode** - like a Print preview. To see how this works click on the **Avery 5160 Label** layout, then on View Preview. There is no “print preview” in FileMaker.

Note: These 4 modes can be accessed with the Ctrl key and B, F, L, & U keys.



Go to Layout - contains the menu of all layouts that are listed on page 4.

The next set of views changes the look of the layout and is available in Browse mode only.

1. **View as Form** - shows one record at a time in the way a format was created.
2. **View as List** - produces a continuous stream of records one right after the other.
3. **View as Table** - shows the data in a layout in Table form with multiple records.

Status Toolbar - the strip along the very bottom of the screen (explained on page 8).

Customize Statue Toolbar – not available on the server.

Formatting Bar – For creating layouts and is not available on the server

Text Ruler - inserts a ruler along the top of any layout.

Zoom In and **Zoom Out** - increase and decrease the size of the screen image.

INSERT and **FORMAT** menus are not available on the server.

RECORDS

In the **RECORDS** menu the Icons match those in the Standard toolbar. They perform the same functions.

<u>N</u> ew Record	Ctrl+N
Duplicate Record	Ctrl+D
<u>D</u> elete Record...	Ctrl+E
Delete All Records...	
<u>G</u> o to Record	▶
Refresh Window	Ctrl+Shift+R
Sho <u>w</u> All Records	Ctrl+J
Sho <u>w</u> Omitted Only	
<u>O</u> mit Record	Ctrl+T
Omit <u>M</u> ultiple...	Ctrl+Shift+T
Modify Last <u>F</u> ind	Ctrl+R
Sa <u>y</u> ed Finds	▶
<u>S</u> ort Records...	Ctrl+S
<u>U</u> nsort	
Repl <u>a</u> ce Field Contents...	Ctrl+=
Relo <u>o</u> kup Field Contents	
<u>R</u> evert Record...	

- **New record** creates a blank record, **BUT** to generate a new record, **ALWAYS** use the “Add new student” button, which has scripts connected to it that create the ID, and other defaults.

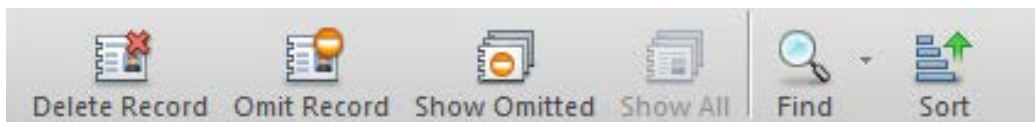


- **Duplicate Record** – Not necessary to use this command.
- **Delete record** - Use with caution! Delete is permanent!
- **Delete Found Records** - Use with caution! It's permanent!
- **Go to Record** - used to move from record to record.

<u>N</u> ext	Ctrl+Down
<u>P</u> revious	Ctrl+Up
<u>G</u> o To...	

- Next [CTRL + DPWN] moves to next record.
- Previous [CTRL + UP] moves to previous record.
- Specify opens a window to put in the number of a specific record.

- **Refresh Window** – not necessary, works with relational tables.
- **Show all Records** - brings to the foreground all the records in database.
- **Show Omitted only** – toggles to omitted records.
- **Omit Record** - sets aside just one record.
- **Omit Multiple** - sets aside a number of specified records in a series.
- **Modify Last Find** - allows you to change the criteria from a FIND search.
- **Sort Records** - Opens a window to sort the records by fields.
- **Unsort** – Unsorts the last sort that was performed.
- **Replace Field Contents** - Replaces the contents of a field in all records or in a found set of records with a new value, a calculation, or a serialized number. (Version5 reads **Replace...**)
- **Relookup Field Contents** – (Version5 reads **Relookup...**) Used for relational databases, not CSIS.
- **Revert Record** - Data entered incorrectly in a field, can be restored to the original data in that field as long as the information is not committed. Data is committed when:
 - Another record is selected
 - Curser is clicked anywhere outside of the current field
 - Enter is clicked



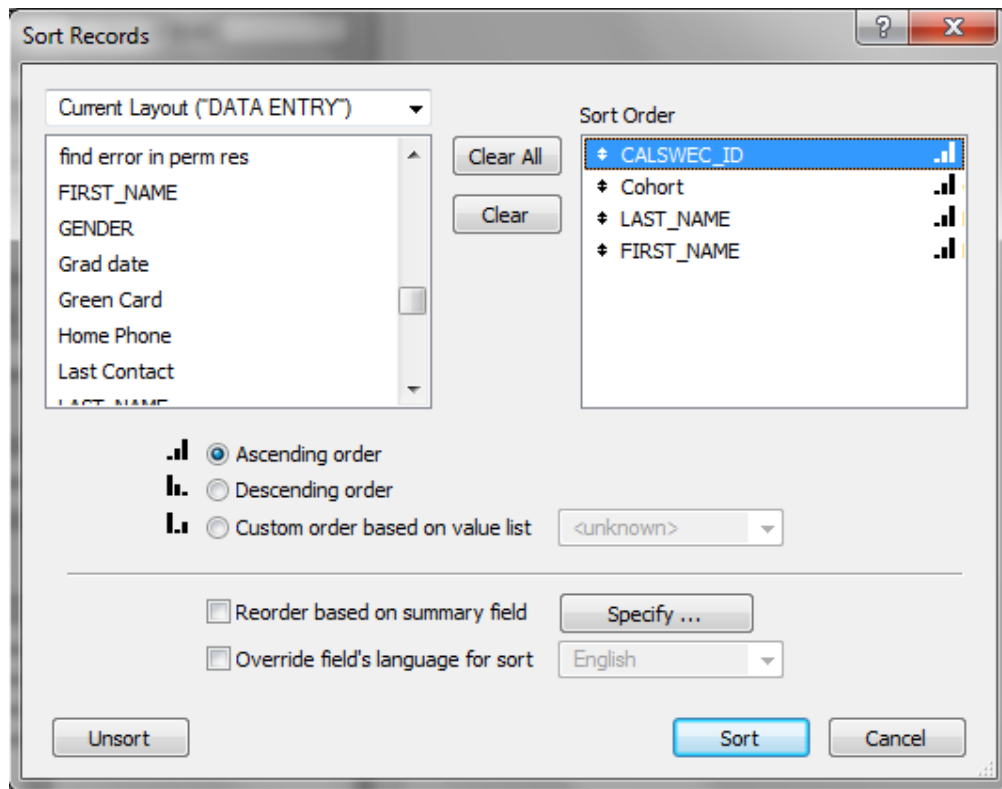
These 6 icons manipulate the records and most have keystroke shortcuts.

Action	Key stroke shortcuts
Delete record - Don't use unless you are sure you want to delete the record!	[CTRL] [E]
Omit Record - omits 1 record (not deleted)	[CTRL] [T]
Show Omitted - toggles back and forth between the omitted records.	none
Show All - brings all records to the front after a FIND	[CTRL] [J]
Find – searches for info and any field omits multiple records (not deleted)	[CTRL] [F]
Sort - helpful for learning how to do things in FileMaker	[CTRL] [S]

Additional key strokes shortcuts are listed on page 15.

Sorting

To sort records, click on the **Sort** option from the **Records** menu, which will open this Dialog box.



Select the fields from the left window and double click to “Move” them to the right window.

The “graphs” next to the fields in the right window indicate the directions of the sort, Ascending order, and Descending order.

To change the order of the sort, highlight the field and click on the small double arrow to the left of the field name and move the field to the position desired.

To activate the sort, hit the **Sort** button.

To clear the sort window and start again, hit the **Clear All** button.

Other ways to sort by a single field.

To sort in the **table formats** (Personal info Table), click on the field header. Click once to sort in ascending order, click again to sort in descending order.

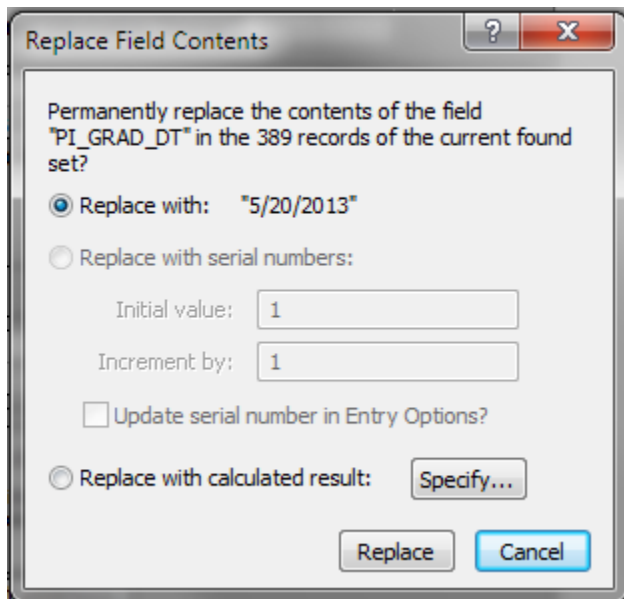
NOTE: If columns in **Table** format do not sort contact Susan Jacquet, who will help correct the problem.

After sorting by a field records at the bottom of the table can be eliminated by placing the cursor on the first record to be omitted then click on the **Omit Multiple** Icon or type [CTRL] [Shift] [T]. In the dialogue box, enter the number of records to be omitted or any number greater than the number below the current record. I often enter 999 to ensure that I have more. Click <enter> 3 times (it will indicate that there are only x number of records, and then that it is omitting x number of records). All records from the point of the cursor down will move to the background.

Using the above method as an alternate for the FIND works best when there are multiple responses in a field that can’t be isolated by FIND.

Replacing Contents

The values in a specific field can be replaced for all records in a found set (e.g. all the 2013 graduates at the end of the spring semester).

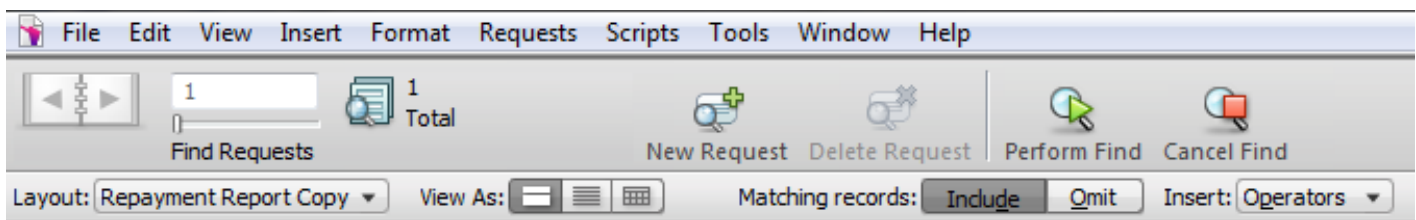


In this example:

- Select only the 2013 graduates.
- In **Browse mode**, select the value in the field you want to replace (e.g. “5/20/2013” in **Grad Date** (PI_GRAd_DT) field).
- If replacing data with a constant value, (Grad Date, for example) type in the value, otherwise select from a drop-down menu.
- Choose **Records** menu then click **Replace Contents**.
- In the Replace Contents dialog box, select the **Replace with: “5/20/2013”** button.
- Then hit **Replace**.

CAUTION!! Replacing field values can't be undone. Be sure to have only those records with fields to be replaced.

FIND Mode



This mode is used for searching. From the **Status Bar** at the bottom of the screen or the **View Menu** at the top of the screen select **Find Mode**. Or use <ctrl> F

Notice that menu ribbon has changed. And the fields of the layout are blank

Example: To find all students who have graduated, go to **DATA ENTRY** and in the **Student Status:** field, click on “graduated”, then click Enter or the **Perform Find** button. Only those records with “graduated” in Student status will be on visible. The others are not visible but are still in the database in the background.

For searching for multiple criteria **Find** can be used in multiple layouts. For instance: To search for the full-time grads who were county employees in school, and had finished their work requirement, use the **Personal** Tab and select “full” in the **Full or Part Time** field, then switch to the **Academic** Tab and

select “Yes” in **County employment?** Field, finally switch to the **Work/Payback** Tab and select “Work requirement Completed” in the **Work Status** field. Now click on “Perform Find”

Note: When searching in any field, the whole word or number need not be typed. A portion of a name can be entered in a field. (eg. Marg will find Margaret, Marge, Margarita, and Margo)

- **Using symbols in FIND:**

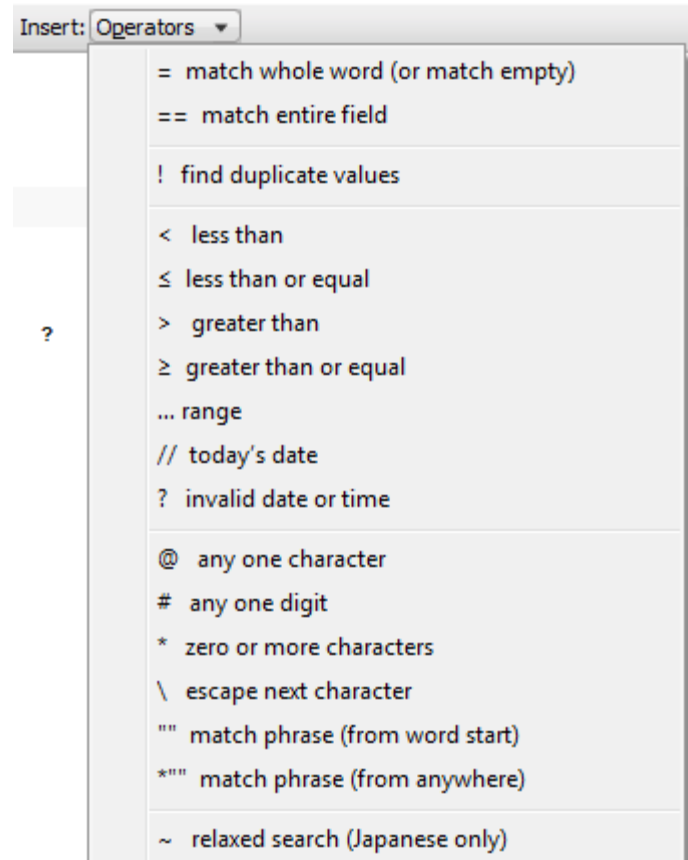
The symbols that are available in the Find Mode can help to refine and specify the query. Insert them alone or followed by a specific value. For example: To search for duplicate records in the data go to **Find** mode, put the cursor in the ID field, select “! find duplicate values” symbol, then hit Find.

To find all students who “graduated” before 2003, go to Find mode, selected “graduated” in the student status field, then move to the grad year field select the < less than symbol and type 2003, then hit Find.

- **Advanced finds**

Finding a range of values:

To find a range of records, enter the endpoints of the range with ... in between. For example: to find the records of all graduates in the fiscal year of 2004-2005, select find mode and then in “expected/actual graduation date” type in “7/1/2004 ... 6/30/2005” then hit the find button (you can also use “...range” from the symbols menu above).

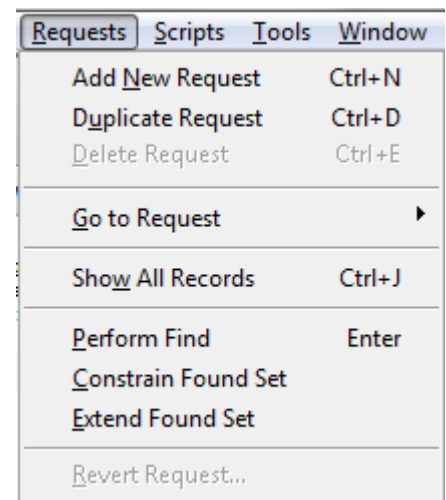


To find out how many of these grads are county employees use “**Constrain Found Set**”.

Go to find mode again, click “Yes” in the “County Employee?” field on either the Academic or Data Entry layout. Then rather than hitting the FIND button, go up to “Requests” menu (which now appears at the top of the page in place of records), click on “**Constrain found set.**” This eliminates all those who are not county employees.

To find the students who began in 2003, but did not graduate. Go to **Find Mode**, and type 2003 in **Year began CalSWECE** field. Now go to the **Requests** menu and click on “**Add new request**” and then click on the **Omit** box Nest to **Matching records:**. Now click on “graduated” in the **student status** field and then click on **Perform Find**.

CAUTION: Always check your data, unless you know it is correct. FileMaker Find will only do what you have told it to do. It does not know how to differentiate among correct and incorrect data entered.



SCRIPTS

Scripts are macros or mini programs that perform simple tasks without going through all the steps each time they are performed. The scripts in the script menu have been set up for the CSIS database. The first 10 can be activated with keystrokes. More scripts may be added as the need arises

A list of the scripts with descriptions of their functions can be found in the CSIS instruction manual.

NOTE: Feel free to use the scripts, but, the **Manage Scripts** is not available on the server. Suggestions for new scripts should be submitted to the Data Management Specialist.

Manage Scripts...	Ctrl+Shift+S
add new student	Ctrl+1
Sort by Name	Ctrl+2
Sort all by Name	Ctrl+3
Sort by CalSWEC ID	Ctrl+4
Sort All by CalSWEC ID	Ctrl+5
portrait	Ctrl+6
landscape	Ctrl+7
ALL in Repayment	Ctrl+8
ALL in Repayment with defaults	Ctrl+9
Part-Time expenses	Ctrl+0
Tracking Letters	
Tracking Months of Work	
Work/Payment Report	
Count by Status	
Job Search	
Current Enrollment	
Verification needed	
Grad counties	

USING CONTAINER FIELDS:

To upload forms or files into a container field form, “Drag and Drop” or “Copy and Paste” the documents or Zip files into the container field.

Folders and multiple files cannot be copied into a container field unless they are Zip Folders.

To create a Zip folder with multiple files

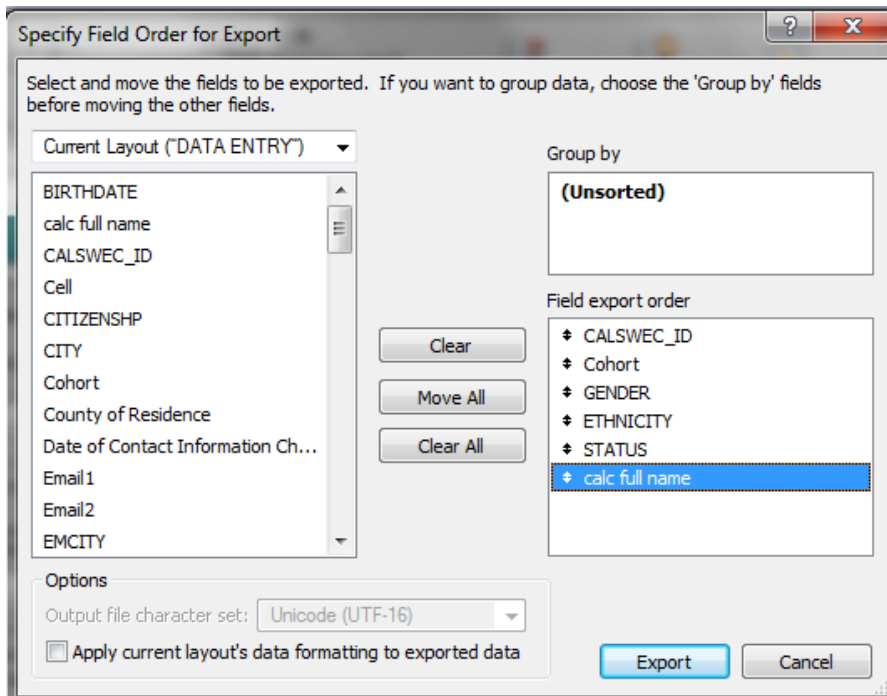
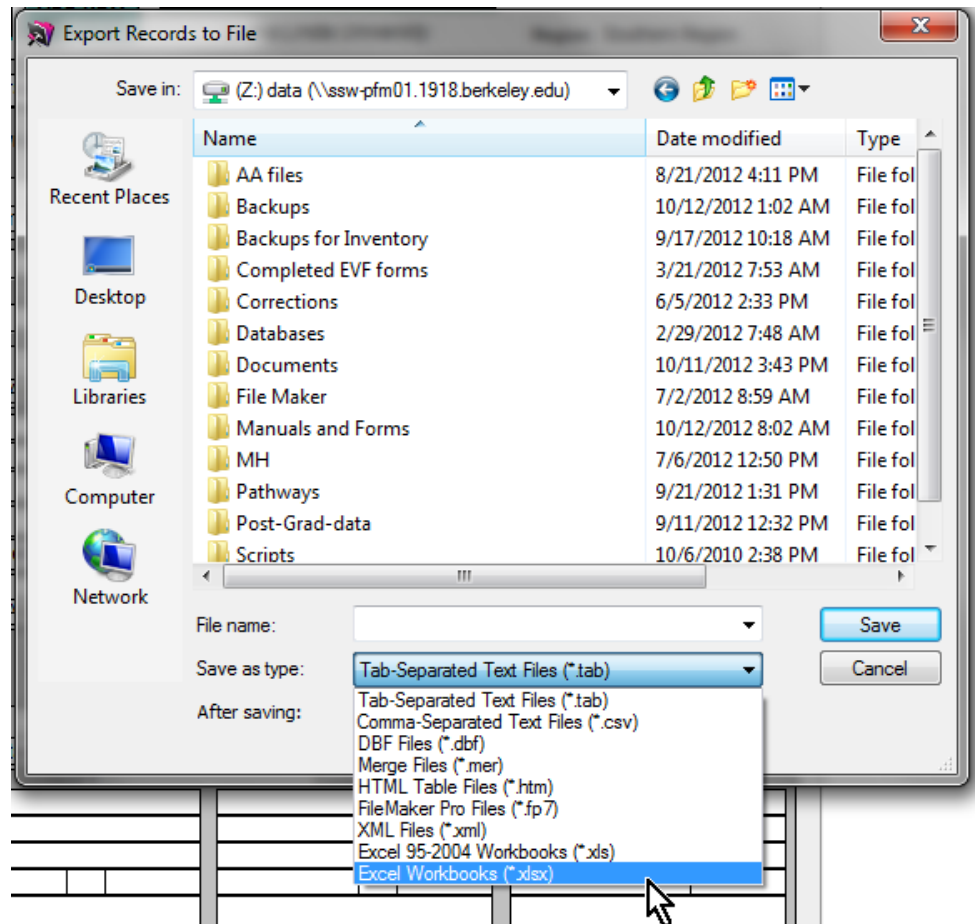
1. Windows 7 or XP
 - a. Highlight the files to be zipped.
 - b. Right click on the group
 - c. Scroll down to **Send to**
 - d. Click on “Compressed (zipped) folder”
 - e. The zipped folder will have the name of the first file, which can be changed.
2. Windows 2003 and NT require a third-party ZIP tool, like the shareware [PKZip](#), [WinZip](#) or the freeware [7-zip](#) or a free console tool like the GNU version of [unzip.exe](#).
3. MAC
 - a. To create a ZIP archive go to the **Finder**, find the file(s) to be archived and highlight them. Select **Create Archive of...** or **Archive** from the **File** menu. The Finder will create an archive which will contain the selected files.

Importing Records – Not available on the server

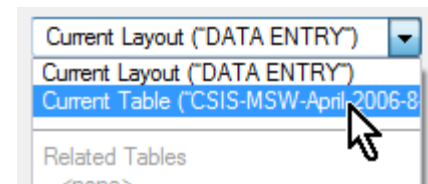
Exporting Records

FileMaker doesn't allow the copy and paste of a group of table cells. The way around this is to export the data to an EXCEL file. Go to the **File** menu and click on **Export records**. The box at right will open. Go to the desired location in the **Save in:** slot. Give the file a name in the **File name:** slot and then in **Save as type:** select **Excel Workbooks**, which preserves the field labels.

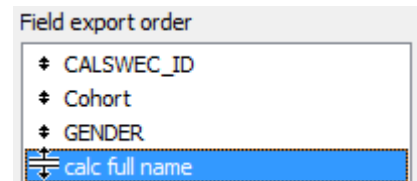
Click on the **Save** button, and then **Continue** in the next window. The screen below on the left will open. Move the desired fields from the left window to the right window. The fields will be exported in the order that they are listed in the right window.



If you do not see the field you need. Click on the arrow next to **Current Layout** and click on **Current Table**, which will bring up all fields. (see below).



To change the order, place the cursor on the small double arrow to the left of the field name, then click and hold. The cursor will change as is shown in the picture below. Hold the cursor on the double arrow and slide the field to the position desired



Save/Send Records as

A layout or record can also be exported as a PDF file with the “**Save/Send Records as**” in the **File** menu. **Save:**

- Records being browsed
- Current record
- Blank Record.

TIPS AND SHORTCUTS

Entering New Student Data

The **Student Information** Layout can be printed out as a blank document and distributed to new students to gather background information for data entry. In the **Print** dialogue box select “Blank record, showing fields” then print the number of copies necessary. The completed forms can then be used to enter the data in the Student Information layout. All data will be recorded in other layouts with the same fields.

See page 9 for other keystroke shortcuts and check dropdown menus In the Standard Toolbar.



This set of buttons found on most layouts is used to move from record to record. The Left or first button moves to the first record, and the Right or last button moves to the last record. The middle buttons move forward and backward on record at a time.

When entering data in a field with a long dropdown menu use the scroll bar on the right, or type the first letter of the data then arrow down the menu.

In Browse Mode, the Scroll button on the mouse scrolls from record to record or person to person, NOT from page to page down a single record.

Finding errors

- Hard returns in small fields are not visible. The field may appear blank. For Example: This field appears normal,

But clicking on the field reveals a hard return after the name.

To check for errors in names and addresses, view the **Avery 5160 labels** in **Preview mode**. This address would look like this:

- 2-digit dates in date fields default to a 2000 year. In the **BIRTHDATE** field they produce errors. A 4/22/79 date becomes 4/22/2079.
- Using months not years in the **Years of Prior Experience** fields inflates the time. For example “12 mos.” calculates as 12 years.
- To find errors in **Grad year**, Residency, or **Work status** sort the “find error in ...” fields in descending order. All the error messages will be at the top or front of the field.

Correcting Errors

FileMaker is **very** interactive, and errors can easily be made when entering data, especially in fields with the drop-down menus. Here are some tips for correcting errors.

- Entries accidentally changed in a field can be undone if caught before leaving the field:
 - Hit the escape key
 - Type <CTRL> Z
 - Use the **Revert record** in the **Records** menu.

To **revert** to original data in a record, go to “**Browse mode**”: Choose **Records** menu then **Revert Record**. Data has already been committed if **Revert Record** is dimmed. That’s when to check with the Data Management Specialist for the correct data from a backup file.

NOTE: If you enter data incorrectly in a record, you can restore the original data to the record as long as the information is not “committed”. But the information is committed when you:

- Select another record
- Click anywhere outside of the current record
- Press Enter on the numeric keypad

If the error information is “committed” contact Data Management Specialist for backup information.

NOTE: If all the above fail contact Susan Jacquet (sjacquet@berkeley.edu or 510-643-9846) for the backup file. The server saves 30 days of backups.

Useful Keystroke Shortcuts

Action

Move forward to the next field
 Move back to the previous field
 Move to the next Record
 Move back to the previous Record
 Move forward one screen
 Move back one screen
 To Save
 Insert current date

Key strokes

[TAB]
 [shift] [TAB]
 [CTRL] [Right Arrow]
 [CTRL] [Left Arrow]
 [CTRL] [Page Down] (for use on Tables layouts)
 [CTRL] [Page Up] (for use on Tables layouts)
 [CTRL] [S]
 [CTRL] [-]

GOOD LUCK