

# FileMaker Pro

## Scripts and Import/Export

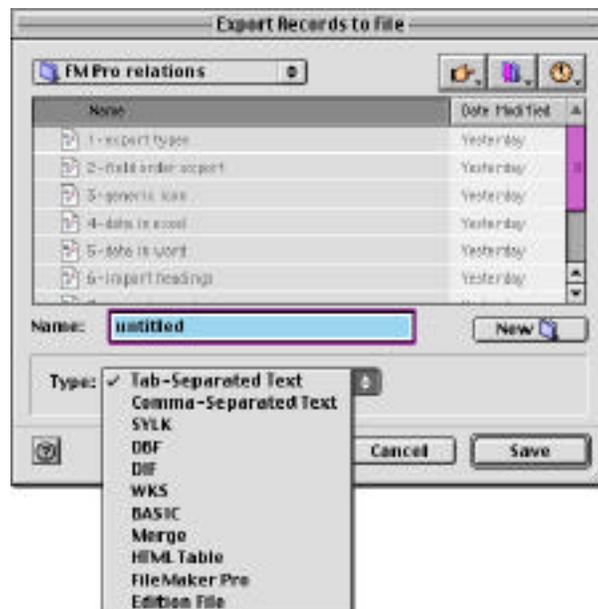
# Import/Export

## Introduction

It is a simple matter to export FileMaker Pro data to be used in many other formats, including Excel or Word documents. It is equally simple to import data into FileMaker. Of course, it helps if the data you want to import is in some sort of format that's easy to recognize, like in columns rather than whole paragraphs.

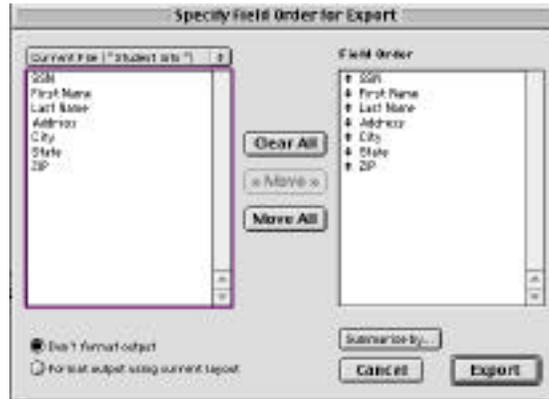
## Export Data

1. If you only want to export certain data, not the whole database, do a **find** to limit the found set to just the records you want to export.
2. In Browse Mode, choose Export Records... from the File menu. In the resultant **Export Records to File** box, give your exported file a name and choose where to save it to.



3. As you can see from the list above, there are several formats to choose from when exporting data. If you're going to use the data in MS Word or MS Excel, choose the Tab-Separated Text format. If you'd like to use the data in a table on a web page, select the HTML Table format.

- The **Specify Field Order for Export** dialog box appears next. Select fields you want to export from the left-hand list and move them to the right-hand box. If you want to export all the fields, double-click on the Move All button. If you want number fields containing commas and dollar signs to retain those symbols, click on the Format output using current layout radio button. Otherwise, click on the Don't format output radio button. Then click on the **Export** button.



- The new file will be placed where you indicated. It won't automatically open. Most likely, the icon for the new file will be generic so you will have to drag it onto the application icon to open it, or open it from inside your chosen application.



	A	B	C	D	E	F	G
1	11111	Mickey	Mouse	55 Disneyland	Anaheim	CA	99944
2	22222	Minnie	Mouse	54 Disneyland	Anaheim	CA	99944
3	33333	Barbie	Mattel	32 Toyland	Orange	CA	94949
4	44444	Gi Joe	Mattel	33 Toyland	Orange	CA	94949
5	55555	Donald	Duck	67 Disneyworld	Miami	FL	00033
6	66666	Daisy	Duck	68 Disneyworld	Miami	FL	00033

Exported file opened in Excel

11111	-Mickey	->	Mouse	->	55	Disneyland	->	Anaheim	->	CA	->	99944
22222	-Minnie	->	Mouse	->	54	Disneyland	->	Anaheim	->	CA	->	99944
33333	-Barbie	->	Mattel	->	32	Toyland	->	Orange	->	CA	->	94949
44444	-Gi Joe	->	Mattel	->	33	Toyland	->	Orange	->	CA	->	94949
55555	-Donald	->	Duck	->	67	Disneyworld	->	Miami	->	FL	->	00033
66666	-Daisy	->	Duck	->	68	Disneyworld	->	Miami	->	FL	->	00033

Exported file opened in Word

SSN	First Name	Last Name	Address	City	State	ZIP
11111	Mickey	Mouse	55 Disneyland	Anaheim	CA	99944
22222	Minnie	Mouse	54 Disneyland	Anaheim	CA	99944
33333	Barbie	Mattel	32 Toyland	Orange	CA	94949
44444	Gi Joe	Mattel	33 Toyland	Orange	CA	94949
55555	Donald	Duck	67 Disneyworld	Miami	FL	00033
66666	Daisy	Duck	68 Disneyworld	Miami	FL	00033

Exported data in HTML format

## Import Data

You can easily import data from Excel or MS Word, so long as it's formatted correctly. For example, you can import text from Word if it's formatted in columns with tabs between the fields. It is less useful if the data is in paragraph format – in that case each paragraph becomes a separate record.

1. Open or create the FileMaker Pro document you want to import records into.
2. Choose Import Records... from the File Menu.
3. Identify the file containing data you want to import. As stated earlier, you can import data from MS Word or MS Excel. A Word document must be saved in Text Only format. If the data is in Table Format, you must switch it to columns (Table to Text) before saving in Text Only format.

When you import data from Excel, the document should be saved as an Excel worksheet, or in SYLK format, or Text (Tab) format.

4. Depending upon which format you're importing from, you may or may not get the following dialog box. This box is asking if your first row is field names or data. Make the appropriate choice.



5. Next, match up the importing data fields (left side) with the FileMaker Pro fields to import into (right side). It could be that either document has unique fields without matches. That's OK.

Be careful to choose if you want the importing records to replace existing records, or if you just want them added to what's already there. Then click the **Import** button.



6. FileMaker will display the new imported records in Browse Mode.

# Scripts

## Introduction

Scripts trigger a series of automatic commands that you've strung together (very much like macros). Careful planning of what you want done is essential in creating scripts. Once a script has been defined, you can stick a button on your layout which, when clicked, will perform the script, or you can use keyboard commands or a drop-down menu to launch a script.

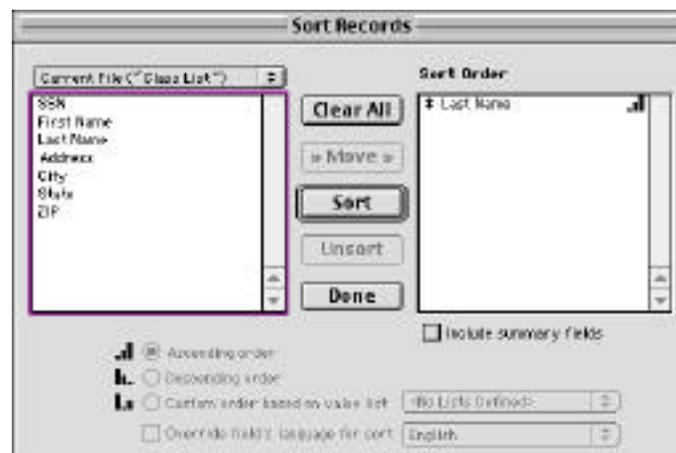
Before you start defining a script, you should prepare so that your settings will be reflected correctly. To set up your script settings:

- a) Go to the layout you want the script to be in.
- b) Go to the mode you want the script to be in (Browse, Find, Layout or Preview).
- c) If you're going to perform a sort, switch to Browse and set up the sort. If you want to sort by Last Name, move that field into the Sort box.
- d) If you're going to print, choose Print Setup from the File menu and specify any print options, such as number of copies.

## Creating a Script

For today's exercise, we are going to create a script that will sort our Class List records by last name and get them ready to print.

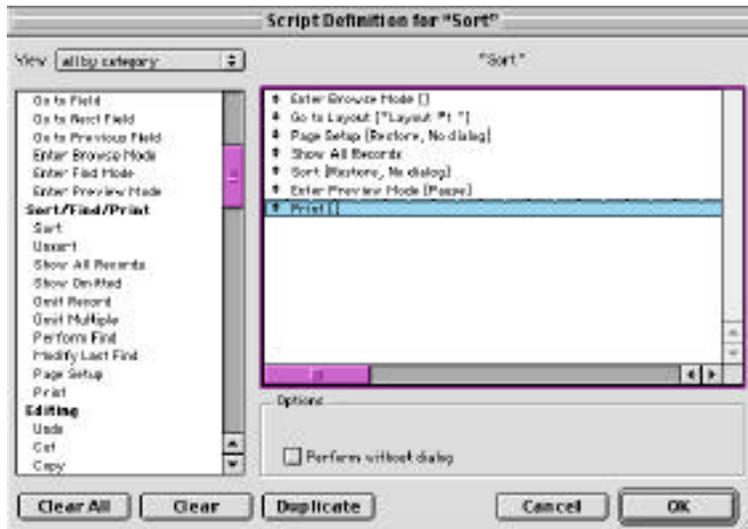
1. Open the document **Class List**, located in the FileMaker Class folder in the Class Docs folder on the desktop. This is a copy of the relational database exercise.
2. Make sure you're on Layout #1 in the Browse Mode. You need to set it up so that it will sort correctly, so choose **Sort...** from the Records menu. Move Last Name to the box on the right side. Then click Done. We don't have to actually perform the sort to set up a script.



3. Now go to the Scripts menu and drag down to ScriptMaker.... In the Scripts Name area near the bottom, give your script a name (try **Sort**). Then click on the Create button.

- The Scripts Definition box opens up with some steps already defined in the right-hand box. Take a look at the existing steps. What they are designed to do is to enter the Browse Mode (if you're not already there when you launch the script), Go to Layout #1 (if necessary), set up the Page Setup, make sure you're working with all the records, sort all the records, and then print the records.

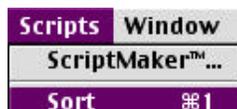
We don't want to print right away. We want to go to the Preview Mode after the records are sorted, so we need to insert that step. In the left-hand box, scroll down until you see the command **Enter Preview Mode (Pause)**. Double-click on that command so that it goes over into the right-hand box. It probably won't go in the correct order, so drag it into place between Sort and Print (see example below).



- You may have noticed that there is a pause in the script after going to the Preview Mode. When we added this command, that was an option and the default is "on". That's the way we want it, so there is no need to change anything.

Click on the OK button, then click on the Done button. Our script is complete!

- Let's check to make sure the script works as desired. We haven't yet created a button to run the script so we'll launch the script by choosing **Sort** from the Scripts menu.



The next thing you should see is the mode switch to Preview Mode. Along the left edge you will see a button to continue the script:

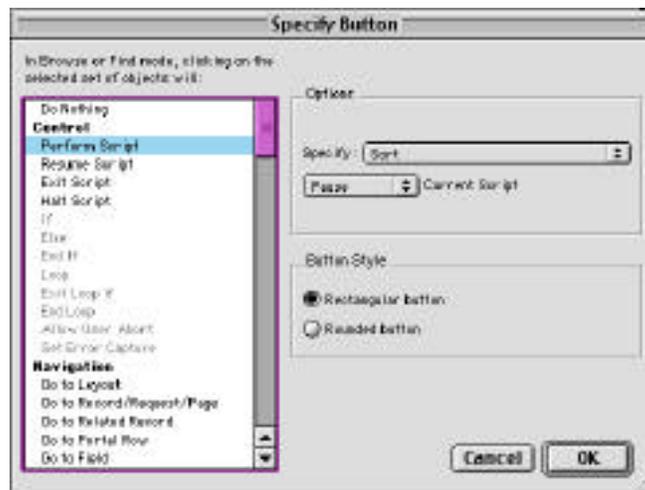


7. Look at the preview of what will be printed. If you're happy with how it looks, click on the Continue button to continue to the next step of printing.

### Creating a Button for a Script

When a script is first created, there are two ways to launch that script: 1) selecting it from the Scripts menu, or 2) memorizing and typing the keyboard command affiliated with the script.. There is a better way! Let's place a button on the layout so that when we click on the button, it launches the script for us.

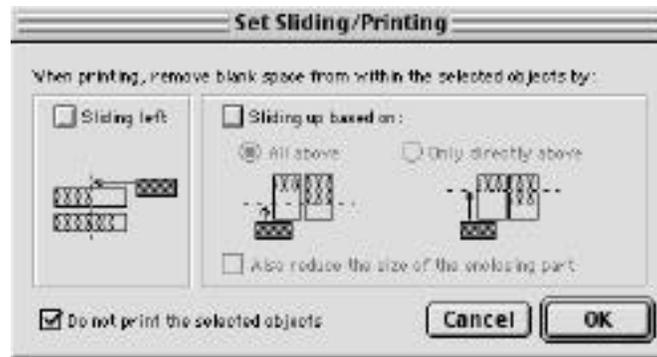
1. Go to the Layout Mode.
2. Click on the **Button** tool. Then move to an empty area on the layout and draw a box.
3. When you release the mouse, the **Specify Button** box will appear. You need to assign an activity to this button. In the left box, select Perform Script. Then to the right, specify which script you want run for this button. (In our case it will be the only script we've defined so far, the Sort script.



4. After clicking the the OK button, you will be returned to Layout Mode. The cursor will be blinking in the middle of the box you just created. Type in a name for this button. If the font is too large, select the text and adjust the font using commands in the Format menu. You can also change the color of the button using the tools on the left. You can resize the button or move it if you want.
5. Switch back to the Browse menu. Click on the button and watch the script run.

When you run this particular script, you'll end up at the Preview Mode. It is obvious in this mode that the button is very ugly and doesn't need to be printed out on every single record. It is quite simple to make the button not print, even though it is available on every record.

6. Return to Layout Mode.
7. Click once on the button to select it.
8. From the Format menu, drag all the way down to Sliding/Printing... In the dialog box, click in the box labeled: Do not print the selected objects. Click OK to return to Layout Mode.



9. Return to Browse Mode and rerun the script. Now you won't see the button in Print Preview!

**Congratulations!**  
You have now completed a Script