FileMaker

Instant Web Publishing Help

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FileMaker basics

About database solutions

A database is a collection of information, or data, that you can organize, update, sort, search, and print. FileMaker® solutions contain records that can be accessed from another copy of FileMaker on a Local Area Network (LAN) or from a web browser. The records consist of fields, which store and display the data.

Note: This document presents features available only when accessing FileMaker databases from a web browser. For information on working in FileMaker, see the documentation that came with the FileMaker product.

What are fields?

Fields store, calculate, and display the data you have entered into a record. The information you type or paste into a field is its value. Field values can be text, numbers, dates, and times. Each piece of information in a record -- like a name, address, or telephone number -- is stored in a field.

What are records?

Records are a collection of fields that contain data about a single activity, individual, subject, or transaction. To add data, you make a new record and enter data into the fields that belong to that record. After you create records in a file, you can edit them, sort them, or find a group of records that contain a particular value.

What are layouts?

Layouts display the records contained in a database solution. The layouts, created by the database designer using FileMaker Pro or FileMaker Pro Advanced, determine how data is organized for viewing, printing, reporting, finding, and entering data. When you change data in a field on a layout, the changes are reflected in the same field on all the layouts and views in the database.

See also

Switching layouts

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About working with FileMaker solutions from a web browser

You can view and work with data in a FileMaker solution from a web browser in many ways. You can:

- see records on different layouts and views
- add, duplicate, edit, and delete records displayed in web-based forms
- search for a subset of records
- sort to rearrange the records

To navigate through a FileMaker solution, use the buttons in the status area or the database layout. Avoid using the Back, Forward, and Refresh buttons in your web browser.

Note: Some features may be disabled by the database designer or administrator. For example, your account might allow you to enter, but not delete records. Additionally, the database administrator can customize the interface and automate many features in buttons, which might invalidate some of the instructions in this document.

If you desire more flexibility and power, you may want to access the solution directly from FileMaker instead of a web browser. For example, with FileMaker Pro, you can:

- modify the database design (with full access privileges, you can create new tables, change field definitions, define relationships, define value lists, manage accounts and privileges)
- modify layouts, script definitions, and value lists (with full access privileges)
- view and print complex, multi-page reports
- work with rich text and data types, like pictures, sounds, and QuickTime files
- import and export data

For a complete list of features, visit www.filemaker.com.
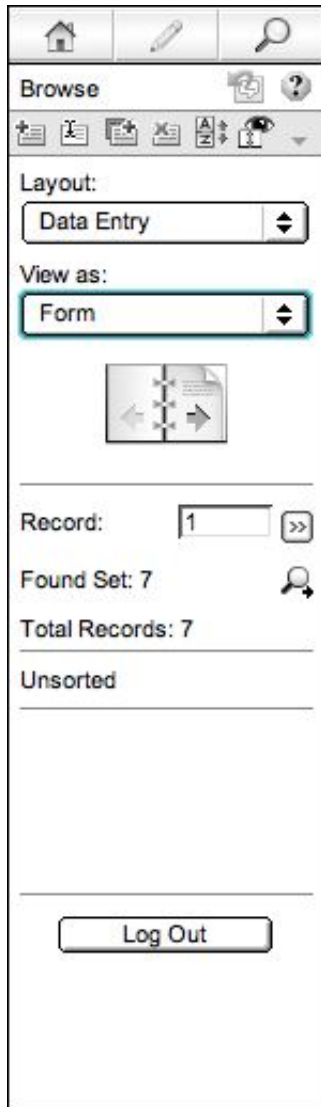
See also

Can't find a feature

Web page doesn't display properly
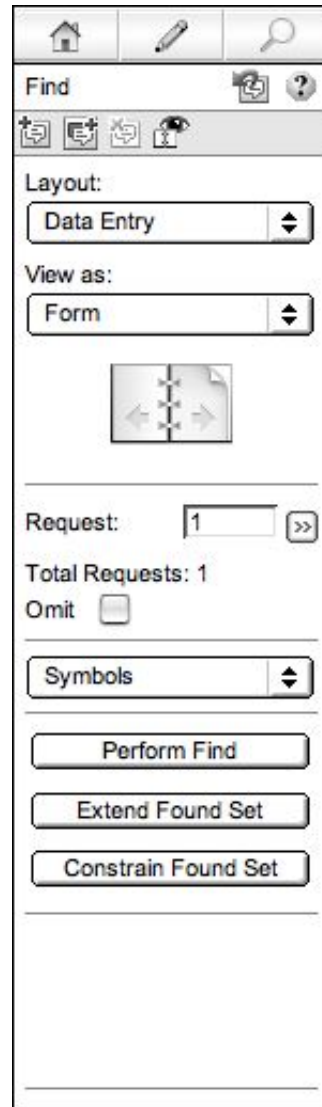
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About the status area

The status area on the left side of the browser window provides access to many features. You can:

- switch modes
- view data on different layouts
- change layout views
- view the next or previous record
- create, edit, duplicate, or delete records
- create, edit, duplicate, delete, and perform find requests to view a subset of the records
- omit records from the found set
- sort the records

Status area in Browse mode   Status area in Find mode

To show the status area, click the **Show Status Area** toggle ▶. To hide it, click **Hide Status Area** ◀.

If the status area toggle is dimmed, access has been restricted by the database administrator.

About modes

You work with data in Browse or Find mode. The current mode is displayed in the [status area](#) under the Home Page button. Change modes by clicking Browse or Find.

Use this mode	To	Status area icon
Browse	Work with the data in a file. You can add, view, change, sort, omit (hide), and delete records.	
Find	Search for particular records that match a set of criteria.	

Accessing solutions with Instant Web Publishing

To access a FileMaker solution on the web using Instant Web Publishing:

1. In compatible web browser software, type the IP address or domain name where the solution is hosted. Visit www.filemaker.com for system requirements.
2. You see either the Instant Web Publishing Database Homepage, or a custom homepage designed by your database administrator.
   If you see the Instant Web Publishing Database Homepage, click the database you want to access. If you see a custom homepage, follow the instructions provided by your database administrator.
3. You may need to provide an account name and password to start the session and access the database.

Note: Your account determines the level of access you have to the data. For information on your access level, see the database administrator.

Logging out of a solution

When you are finished, it is important to log out from the file before closing the browser window.

To end your session securely, click **Log Out** in the bottom of the status area, then quit the web browser application.

Important security considerations:

- If you don't log out **and** quit the web browser software, the connection to the database is still active, and data may be accessible to other web users.
- When accessing a FileMaker solution from a web browser, you are connected to the database, and you might be prohibiting others from accessing the file. If you are not working with the solution, it's good practice to log out.
- If you stop using the solution for a period of time, your account may time out. If this happens, re-access the database from the Home Page. For more information, see the database administrator.

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Printing records

When printing FileMaker records from a web browser, you can only print the records you see onscreen. The status area and records that are not visible will not print. If you need to print all the records, talk to the database administrator about accessing the database solution with a copy of FileMaker Pro.

Note: Specific printer and print setup options depend on the web browser, printer and system software you're using. Refer to the printer and system documentation for more information.

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Adding and viewing data

Navigating records in Browse mode

To move from one record to another, click the book in the status area.

To move	Show the status area and do this	
To the next record in a file	Click the right side of the book.	
To the previous record in a file	Click the left side of the book.	
To a specific record	Type the record number, then click **Go to record**.	

Note: Don't use your web browser's Back and Forward buttons to move from one record to another.

Adding data to the database

You add or duplicate records in Browse mode. FileMaker stores new records at the end of the file. In Browse mode, you see the new record after the current record, or after the last record in the found set.

To add a record:

1. In Browse mode, click **New record** to add a record to a database.
2. Click in a field and type the new information. Press Tab to move between fields.
   - You cannot enter text with any formatting, for example, bold or underline styles. To enter rich text, you must access the solution with a copy of FileMaker Pro.
   - Click **Undo** to clear the data in the new record.
   - Click **Cancel** to return to Browse mode without adding a record.
3. When you finish entering the information in the fields, click **Submit** to add the record.

To duplicate a record, click **Duplicate record** , then click **Submit**.

Note: For layouts that contain tabs, click a tab to bring the associated tab panel to the front for viewing.

Editing records

Use the Edit record feature to permanently modify a record in the database.

To edit a record:

1. In **Browse mode**, navigate to the record you want to edit.
2. Click in the field and edit the data, or click **Edit record** and then click in the field and edit the data.
   - Click **Undo** to clear your changes and return the original field values.
   - Click **Cancel** to return to Browse mode without editing the record.
3. Click **Submit** in the status area.

Important: You cannot revert to the original values after clicking Submit.

See also

Navigating records in Browse mode

Switching layouts

Change layouts to view the data in a different arrangement. To view data on a different layout, choose a layout from the Layout pop-up menu at the top of the [status area.](#)

See also

[About the status area](#)

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Viewing records in a form, list, or table

You can change the way records display and print on a particular layout by switching its view.

To view records	Under "View As" in the status area, choose
Individually (one record per screen)	Form
In a list (25 records display per screen, each as a separate copy of the layout/form)	List
In a table (50 records display per screen, in a tabular format like spreadsheets)	Table

When viewing records in a list or table view, the current record is always at the top of the screen. To view previous records, click the left arrow in the book or enter a record number and click **Go to Record** ⏩.

Note: For layouts that contain tabs, click a tab to bring the associated tab panel to the front for viewing.

See also

[Navigating records in Browse mode](#)

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Selecting the current record

In Browse mode, a solution has one current (selected) record at a time.

In this view	The current record is
View as Form	The record you're displaying
View as List or View as Table	The record that's marked with a solid vertical bar along the left side. To work with another record, click in the record to make it current.

When viewing records in a list or table view, the current record is always at the top of the screen. To view previous records, click the left arrow in the book or enter a record number and click **Go to Record** ⏩.

Deleting records

When deleting a record from the database, you permanently discard the data that is entered in all the fields in that record.

To delete a record:

1. In Browse mode, navigate to the record you want to delete.
2. Click **Delete record** 🗐 , then click **OK** to permanently delete the record. Click **Cancel** to return to Browse mode without deleting the record.

Finding and sorting data

Finding Records

Use Find mode to locate records based on search criteria. You type criteria (the value or values to find or to omit) into fields in one or more find request. Find requests are created, edited, deleted, and navigated like actual records.

When you perform the find, FileMaker searches through all the records, comparing your search criteria with the data in the file. Records with data matching the criteria become the found set, which is the subset of records displayed in Browse mode when the search is complete.

To find a record or group of records:

1. Click **Find mode** 🔍 .
2. Click in the field you want to search on and enter the search criteria.
3. Click **Undo** 🔄 to reset the search criteria.

For example, to find records where the city is New York, click in the City field and type New York. You can also use the operators or criteria below to search for records.

To find values that are	Use	Example
Less than what you type	<	<40 finds all the records less

next		than 40
Less than or equal to what you type next	<=	<=05:00:00 finds all the records less than or equal to 5:00
Greater than what you type next	>	>05:00:00 finds all the records after 5:00
Greater than or equal to what you type next	>=	>=Smith finds all the records whose name is "Smith" and all records alphabetically after "Smith"
An exact match, although the field may contain other values	= (before criteria)	=Smith finds all the records where the name is "Smith," including "John Smith," but not Smithson
An exact match, in the order you specify, and the field contains no other values	== (before criteria)	==Smith finds all the records where the name is "Smith," but not "John Smith" or "Smithson"
Within the range you specify	.. or ... (two or three periods)	12:30 pm...7:30 pm finds all the records between 12:30 and 7:30 pm, ..Tue finds all the records where the date occurs on a Sunday, Monday, or Tuesday
Within the range you specify (date, time, or timestamp fields)	only the components that are necessary to identify the range	5/2006 finds all the records where the date is in May of 2006
Within the sub-range you specify	{..} or {...} (two or three periods)	11/{9..16}/2006 {3..5} PM finds all the records where the timestamp is from the 9th through the 16th of November from 3:00 PM to less than 6:00 PM
Within a range satisfying several criteria	a combination of operators	*/{10..15}/2006 finds all the records where the date is in 2006, but only for days from the 10th through the 15th
Duplicate values	! (exclamation point)	! finds all the records that have duplicate values in a field
Today's date	//	// finds all the records that have today's date
Dates on a particular day of the week (date or timestamp field)	The full or short day name	Tuesday finds all the records where the date occurs on a Tuesday, =Thu 2006 finds all the records where the timestamp is a Thursday in 2006
All valid values for a particular date or time component (date, time, or timestamp field)	* (representing an entire component, not an individual character) or leave the particular component unspecified	5/12/* or 5/12 finds the 12th day of May in any year, *:15 finds all times that are 15 minutes after any hour
Invalid dates or times	?	? finds all the records that have invalid dates or times
One unknown or variable text character	@	@on finds all the records that have 3 characters and end in "on," like "Don"
Zero or more unknown or variable text characters	*	*smith* finds all the records that have "smith" in the name, like "Smithson," "Blacksmith"
Literal text in a field (useful	" "	", Ltd." finds all the records

for searching on characters like ",")		that have ", Ltd."
Empty fields (for example, records of unfilled orders)	= (just type an equal sign)	= finds all the records that have no values

4. Click **Perform Find** to search the database and view a subset of the records.
5. The status area indicates how many records were found.

Additional tips

- To reset the found set to include all records, click **Show all records** .
- To view, repeat, or change a find request, click **Modify Last Find** .
- You can further refine a search by omitting a specific record that you are browsing, omitting multiple consecutive records, or by constraining or extending the found set with additional find requests.

Note: When you perform day of the week searches on systems set to a system format other than English, you can use English day names and abbreviations. Sunday is the first day of the week in English and Japanese, but Monday is the first day of the week in other system formats.

See also

Performing AND/OR searches

Finding record exceptions

Omitting records from a found set and viewing omitted records

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Performing AND/OR searches

To perform an AND search, specify one find request using multiple fields. For example, you can perform a search where City = New York AND Name = Smith.

1. Click **Find** mode and click into the field you want to search.
2. Type the search criteria.
   For example, to find records where city = New York, click in the City field and type New York.
3. Click into the next field to specify additional criteria (an AND search). For example, click in the Name field and type Smith.
4. Repeat step 3 until you have entered all your search criteria.
5. Click **Perform Find** to search the database and view a subset of the records.

To perform an OR search, where any search criteria is matched, you specify multiple find requests. For example, you can perform a search where City = New York OR Paris, or you can perform a search where City = New York OR Name = Smith.

1. Click **Find** mode and click into the field you want to search.
2. Type the search criteria.
   For example, to find records where city = New York, click in the City field and type New York.
3. Click **Add new request** .

4. In the new blank find request, click into the field you also want to search on and type the additional search criteria (for example, Name = Smith).
5. Repeat steps 3 and 4 until you have entered all your search criteria.
6. Click **Perform Find** to search the database and view a subset of the records.

Keep these points in mind:

- Each find request can contain multiple fields that specify an AND request. For example, to find all records where City = New York AND Name = Smith.
- Multiple find requests are performed in the order they are created.
- For multiple find requests, AND operations are evaluated before OR operations. For example, a complex AND/OR search with multiple find requests are evaluated as: (City = New York AND Name = Smith) OR (City = Paris AND Name = Smith) OR (City = Paris AND Name = Dupont).
- For search criteria using Omit (when your criteria DOES NOT EQUAL data), it is generally best to specify search requests with Omit last. (First include all the records you want to select from, then exclude undesired records from the group).
- You can make modifications to the found set by constraining or extending the found set.

See also

Finding records

Finding record exceptions

Omitting records from a found set and viewing omitted records

Constraining (narrowing) a found set

Extending (broadening) a found set

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Finding record exceptions

To find records which do not equal a specified value, you omit records with that criteria while performing a find. For example, to find all sales records except those for the city of London:

1. In Find mode, type criteria for the records to omit (type London in the City field).
2. Click **Omit.**
3. Click **Perform Find.**

Finding some records while omitting others:

For example, to find vendors in the state of California, except those in Los Angeles:

1. In Find mode, type the criteria for the records to find (type CA in the State field).
2. Click **Add new request** 📇.
3. Type criteria for the records to exclude (type Los Angeles in the City field).
4. Select **Omit.**
5. Click **Perform Find.**

Keep the following in mind:

- You can have Omit search criteria in more than one request.
- Multiple find requests are performed in the order they are created. For example, in a Contacts solution with clients in the US and France:
    - If the first request finds all clients in Paris and the second request omits all clients in the USA, the found set will not find records in Paris, Texas or anywhere else in the USA.
    - If the order of the requests is reversed (the first request omits all clients in the USA and the second request finds all clients in Paris), the found set includes all clients in Paris, France and in Paris, Texas, but no records for clients elsewhere in the USA.

You can also omit records from a found set after performing a find.

See also

Omitting records from the found set and viewing omitting records

Constraining (narrowing) a found set

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Omitting records from a found set and viewing omitted records

Omit a record or a series of records to remove them from the found set. Omitted records are still in the database; they just aren't included in the found set.

To	Expand the status area and do this	
Omit a specific record	Display or select the record to omit, then click **Omit record.**	
Omit multiple (consecutive) records	Display or select the first record in a series of records to omit, then click **Omit multiple**. In the Omit Multiple dialog box, type the number of records to omit, then click **Omit.**	
View the omitted set and hide the current found set	Click **Show omitted.**	
Reset the found set to include all records	Click **Show all records**.	

Keep these points in mind:

- You can also reduce the number of found records by constraining the found set.

- You can omit records while performing a find request (a "does not equal" search) by selecting **Omit** when specifying the search criteria.

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Constraining (narrowing) a found set

If you have a found set and you want to further reduce the number of records to match a more specific criteria, use the Constrain Found Set feature.

For example, you can add to a find request where Employees = Sales to find a specific employee:

1. In Find mode, perform a find to locate all of the employees who work in Sales.
   The found set is displayed in Browse mode.
2. To further reduce the records, switch back to Find mode and type the criteria to narrow the search (type Alvarez in the **Last Name** field).
3. Click **Constrain Found Set.**

The found set now consists of employees in Sales named Alvarez.

See also

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Extending (broadening) a found set

If you have a found set and you want to expand the number of records to match additional criteria, use the Extend Found Set feature.

For example, after searching for customers in New York, you can broaden the search to also find customers in Hong Kong:

1. In Find mode, perform a find to find customers in New York.
   FileMaker displays the found set (of customers in New York) in Browse mode.
2. Switch back to Find mode and type the criteria to broaden the search (type Hong Kong in the City field).
3. Click **Extend Found Set**.

The found set now consists of customers in New York and Hong Kong.

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Sorting records

You can rearrange the order of the records by sorting the database. Records can be sorted in

ascending order, descending order, or a custom order based on a list of predefined field values.

To sort records:

1. In Browse mode, navigate to the Layout that has the fields you want to sort on, then click **Sort** ⊞.
2. Select the first field to sort (for example, Last Name).
3. Choose the sort order (for example, Ascending order, for A to Z; Descending order for Z to A, or a custom order based on predefined field values), then click **Move**.
4. Repeat steps 2 and 3 for each sort field (for example, to sort on Last Name and then First Name).
5. Click **Sort**.

If you're viewing a layout in Table View, you can click the column header (the field name) to sort the table in ascending or descending order on that field.

The current record is displayed in the top row of the table. To view the first record, for Record Number, type 1 and click **Go to Record** ⊞. Or click the left arrow in the book in the status area to view previous records.

To restore the records to the creation order, click **Sort** ⊞. In the Sort dialog box, click the **Unsort** button.

Note: You can only sort by fields that are on the current layout.

See also

Can't find records after sorting

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Troubleshooting

Web page doesn't display properly

If a page doesn't display correctly, check for the following:

- Verify that JavaScript is enabled in the web browser. See the web browser documentation for more information.
- Verify that you are using a supported web browser. For browser requirements, visit www.filemaker.com or ask your database administrator.

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Can't find a feature

If you can't find a feature, check for the following:

- Verify that the [status area](#) is showing by clicking the right arrow at the top of the screen ▶.
- If the status area toggle is dimmed, it may have been locked by the database administrator. Look for the equivalent functionality in a button they have provided.
- Verify that you are in the correct mode. For example, you cannot create a new record when you are in Find mode.
- The account you are using might not offer access to all features like creating, sorting, or deleting records. For more information, see your database administrator.
- If you did not enter your account and password when accessing the database, you might be logged in with the "guest" account, which typically does not have full access. For more access, see the database administrator.

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Can't find records after sorting

When you sort the database, the current record does not change. To view the records in sorted order starting with the first record or set of records, use the book in the [status area](#) to navigate to the first record.

See also

[Navigating records in Browse mode](#)

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Can't go back or forward in a web viewer

Use your browser's shortcut menu to go back/forward in a web viewer. Right-click (Windows) or Control-click (Mac OS) within a web viewer and choose **Back** or **Forward**.

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