FileMaker®

Installation and New Features Guide

for FileMaker Pro 11 and FileMaker Pro 11 Advanced

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Before you begin

Welcome to your FileMaker® software. FileMaker is designed to help you manage information easily and effectively.

About FileMaker documentation

This *Installation and New Features Guide* tells you how to install FileMaker Pro 11 or FileMaker Pro 11 Advanced on your Windows or Mac computer and introduces new features in the software.

Note This guide uses "FileMaker Pro" to refer to both FileMaker Pro and FileMaker Pro Advanced, unless describing specific FileMaker Pro Advanced features.

The *FileMaker Pro User's Guide* provides essential information to get you working productively right away. If you've never used FileMaker Pro, work through the *FileMaker Pro Tutorial* to try out the major features. For details and comprehensive, step-by-step procedures, see FileMaker Pro Help.

The *FileMaker Pro Advanced Development Guide* describes additional features available in FileMaker Pro Advanced, including features such as customizing menus; copying and importing tables; Database Design Reports; and field, variable, and expression monitoring using the Data Viewer.

Note When a feature or procedure is specific to a particular platform, you see instructions and illustrations that are also specific to that platform. For features or procedures that are similar on both platforms, you may see illustrations for either Windows or the Mac OS.

To view and download FileMaker documentation, visit www.filemaker.com/documentation.

To send your feedback on this guide, visit www.filemaker.com/company/documentation_feedback.html.

Customer support and Knowledge Base

Visit www.filemaker.com for answers:

- FileMaker Knowledge Base—Help menu > Resource Center

- FileMaker Forum—Help menu > FileMaker Forum

- Find a FileMaker ready-made solution for your business, organization, or school— developer.filemaker.com/solutions/

- Get a list of FileMaker resources— www.filemaker.com/cs

- FileMaker product details and system requirements— www.filemaker.com/products

- Subscribe to FileMaker newsletters— www.filemaker.com/fmnews

Note The FileMaker Knowledge Base is available only in English. The FileMaker Forum is available only in English, French, German, and Japanese.

Telephone assistance

FileMaker support representatives can help you with installation, launch, or reinstallation (not including data recovery) when your hardware configuration meets the minimum system requirements for the software. Visit www.filemaker.com/cs for a list of phone numbers.

Update notification

FileMaker Pro 11 automatically checks for software updates every seven days. If you have an internet connection, you can go to the update web page and download the updater software. You can update later by choosing Help menu > Check for Updates.

Note This feature does not install the software for you. You must have an internet connection to access and download the updater software.

To turn off update notification, do one of the following:

- In the Update Notification dialog box, select
  Do not automatically check for updates.

- In Windows, choose Edit menu > Preferences. In the Mac OS, choose
  FileMaker Pro menu > Preferences. In the General tab, deselect the
  Notify me when an update is available option. To turn on update
  notification again, select this preference.

If you disable update notification, the Update Notification dialog box will
not display.

New version notification

FileMaker Pro 11 automatically checks for new software versions every
30 days and informs you if a new version is available for purchase.

To turn off new version notification, do one of the following:

- In the New Version Notification dialog box, select
  Don't tell me about new versions again.

- In Windows, choose Edit menu > Preferences. In the Mac OS, choose
  FileMaker Pro menu > Preferences. In the General tab, deselect the
  Notify me when a new version is available option. To turn on new
  version notification again, select this preference.

If you disable new version notification, the New Version Notification
dialog box will not display.

About the license key

FileMaker software comes with a unique, 35-digit alphanumeric license
key. Do not lose this license key. We recommend that you keep the license
key in a safe place in case the software ever needs to be reinstalled.

You can find your license key(s) on the back of the DVD sleeve. If you are
installing the software using an electronic download, follow the
instructions in your order confirmation email. You must enter a valid
license key to install the software.

The license key ensures adherence to the FileMaker Pro or FileMaker Pro Advanced Software License, which allows for use of one (1) copy of the software on a single computer at a time along with a second copy for use on a home or portable computer, subject to the restrictions in the Software License. For more information, refer to the FileMaker Pro or FileMaker Pro Advanced Software License located in the application folder where you installed your software.

If another copy of the application installed with the same license key is running on the network, the FileMaker Pro application displays this error message: "The maximum number of licensed users are currently using this copy of FileMaker Pro."

To install FileMaker Pro on multiple computers, you must have a unique license key for each installation, or obtain a volume license for multiple computers. You must license one copy of FileMaker Pro for each computer.

Requirements for features in Windows

Some of the features of FileMaker Pro for Windows require additional software.

Feature	Software requirement
Send Mail script step using an email application	Microsoft Exchange, Microsoft Outlook, Microsoft Outlook Express and Eudora **Note** This requirement does not apply to SMTP mail.
Phone dialing	Phone dialer or other Telephony API (TAPI) compliant software
ODBC features	Microsoft Data Access Components (MDAC) version 2.8 SP1 (Windows XP), Windows DAC 6.0 (Windows Vista), or Windows DAC 6.1 (Windows 7). To update MDAC software, visit www.microsoft.com. For more information about using third-party ODBC drivers, visit www.filemaker.com/support/technologies. FileMaker ODBC drivers are available in the xDBC folder in the installation disk image. For more information about using ODBC features, see the *FileMaker ODBC and JDBC Guide* and FileMaker Pro Help.
Insert QuickTime movie and image files	QuickTime 7.5 software (available at www.apple.com)

Requirements for features in the Mac OS

Some of the features of FileMaker Pro for the Mac OS require additional software.

Feature	Software requirement
Send Mail script step using an email application	Microsoft Entourage or the Mac OS Mail email client software **Note** This requirement does not apply to SMTP mail.
ODBC features	ODBC Manager from Actual Technologies (available at www.odbcmanager.net) or Apple's ODBC Administrator Tool for Mac OS X. For Mac OS X version 10.5, ODBC Administrator is installed as part of the operating system. For Mac OS X version 10.6, ODBC Administrator is available at www.apple.com/support. For more information about using third-party ODBC drivers, visit www.filemaker.com/support/technologies. FileMaker ODBC drivers are available in the xDBC folder in the installation disk image. For more information about using ODBC features, see the *FileMaker ODBC and JDBC Guide* and FileMaker Pro Help.
Import files from Bento®	Bento 2 or a later supported version (available at www.filemaker.com)
Insert QuickTime movie and image files	QuickTime 7.5 software (available at www.apple.com)

Features not supported in Windows

In Windows, FileMaker Pro does not support the Perform AppleScript and Speak script steps. It also does not support importing files from Bento.

Features not supported in the Mac OS

In the Mac OS, FileMaker Pro does not support the Dial Phone, Insert Object, Send DDE Execute, and Update Link script steps.

Opening files from previous versions

FileMaker Pro 11 can open files created in earlier versions of FileMaker Pro. See FileMaker Pro Help for information.

Upgrading FileMaker Pro from a previous version

If you are upgrading FileMaker Pro from a previous version, FileMaker recommends that you upgrade to the new version before uninstalling the previous version.

To upgrade FileMaker Pro from a previous version:

1. Install the upgrade using the 35-character license key, which is on the back of the DVD sleeve or emailed to you with your download link.

2. Move plug-ins, dictionary information, and your preferences to the new version of FileMaker. For information about moving your preferences, refer to the FileMaker Knowledge Base available at www.filemaker.com/kb.

3. If you plan to use only the latest version, uninstall the previous version.

If you choose to uninstall the previous version before upgrading to the latest version, make sure you have the license key for the previous version. When installing FileMaker Pro with an upgrade license key, the installer searches your hard drive for the previous version. If a previous version is not located, you are asked to enter the license key for the previous version of the product.

Updating your User Dictionary

If you added words to a User Dictionary in a previous version of FileMaker Pro, you can use it with FileMaker Pro 11. See FileMaker Pro Help for information about converting a User Dictionary.

Installing under a volume license

If you're installing multiple copies of FileMaker Pro under a volume license, or if you want to do a silent install, you can automate the process. Use the Assisted Install.txt file on the FileMaker Pro DVD or in your electronic download to bypass the usual install dialog boxes. For more information, see *FileMaker Pro Network Install Setup Guide*. For information on volume licensing, visit www.filemaker.com.

Chapter 2
Installing FileMaker Pro in Windows

Before you begin the installation process, exit other open programs and save your work. For late-breaking information about FileMaker Pro, browse the contents of the DVD and view the Read Me file or visit www.filemaker.com.

Installation notes

Before you install FileMaker Pro, review the following notes:

- To install FileMaker Pro, you must have Administrator privileges and use the Administrator user name and password.

- If your computer is running virus protection software, turn it off prior to installing FileMaker Pro, and then turn it back on afterwards.

- By default, FileMaker Pro will be installed in this folder:

  C:/Program Files/FileMaker/FileMaker Pro 11

  During installation, you can choose another drive or another folder.

- By default, FileMaker Pro Advanced will be installed in this folder:

  C:/Program Files/FileMaker/FileMaker Pro 11 Advanced

  During installation, you can choose another drive or another folder.

- During installation, you can choose whether to install all program features (Complete), or to install only selected portions of the program (Custom). For example, you may choose not to install certain features in order to save disk space.

- At the start of installation, you choose a language version for the FileMaker Pro installer. The default selection matches your operating system language. A Complete install will install only the language version you choose. You can install additional language versions by choosing Custom install, then selecting other language packs from the list of supported languages.

- Prior to an upgrade installation or software update, FileMaker software scans all hard drives and volumes connected to your system, searching for previous versions. This scan may take several minutes if you have multiple drives or volumes.

- If you have installed FileMaker Pro 11 Trial on your computer, you need to uninstall it before installing FileMaker Pro. For information about uninstalling FileMaker Pro, see "Uninstalling, modifying, or repairing FileMaker Pro 11" on page 15.

Installing FileMaker Pro

You must use the installation program to install FileMaker Pro—you can't install FileMaker Pro by dragging files to your hard disk.

If you want to create an install log file that lists the registry entries and path of all installed files, you must install FileMaker Pro from the command line. See "Installing FileMaker Pro from the command line" on page 13.

To install FileMaker Pro on your hard disk:

1. Do one of the following:

- If you received your software electronically, after downloading the file, double-click the installation icon (.exe file).

- If you are installing FileMaker using a DVD, insert the DVD into your DVD drive, open the FileMaker DVD window, and click the installation icon.

Click to install the application | Click to browse the contents of the DVD | Click to exit

2. Install FileMaker Pro by following the onscreen instructions.

   For additional details about installation, see "Installation notes" on page 11.

3. When the installation is complete, click Finish.

   The Product Registration dialog box appears.

Registering FileMaker Pro

Please take a few moments to register your product. By registering your software, FileMaker will be able to assist you in recovering your license key if you ever lose it. You will also receive priority notification of software updates, upgrades, and special offers. Follow the prompts to provide your registration, product, and additional information.

If you are using the FileMaker Pro trial version, you must register your software prior to use.

You can also register by choosing Help menu > Register FileMaker Pro.

Installing FileMaker Pro from the command line

To install FileMaker Pro from the command line and create an installation log file:

1. Insert the DVD into your DVD drive.

2. Open a command window.

3. In the command window, type:

   ```
   E:\Files\setup.exe /v"/Lr
   C:\FMP11InstallLog.txt"
   ```

   where E: is the DVD drive. If your DVD drive uses a different drive letter, type that letter instead of E.

4. Follow the onscreen instructions.

   The FMP11InstallLog.txt file will be located in the root directory of your hard disk. You can view it with WordPad or a word processing program.

About installing Bonjour

The Bonjour service enables automatic discovery of computers, devices, and services on IP networks. You need to have Bonjour installed on your system for remote hosts to be discovered.

If Bonjour is not installed or the service is not running, FileMaker Pro can't discover remote networks. For example, you won't be able to view hosted databases in the Open Remote File dialog box or display the list of remote files to use as your external data source.

Without Bonjour, you have to manually enter the IP addresses for remote databases.

During the FileMaker Pro installation, the installer uses the following process:

- If Bonjour isn't detected, the installer alerts you and prompts you to install Bonjour.

- If Bonjour is detected but the installed version is not supported by FileMaker, the installer alerts you. It prompts you to manually uninstall the older version of Bonjour and manually install the version supported by FileMaker.

- If Bonjour is detected and the installed version is supported by FileMaker, the installer doesn't alert you and doesn't install Bonjour.

To install Bonjour manually:

1. Open the FileMaker Pro installation folder.

2. Open the Bonjour folder.

3. Open the 32-bit or 64-bit folder based on your version of Windows.

4. Double-click the BonjourSetup icon.

5. Follow the on-screen instructions to install Bonjour.

Where files are stored on your hard disk

The FileMaker Pro installer copies files to several folders on your hard disk, depending on the installation options you choose and your operating system. If you performed a command line installation and specified an install log file, you can view the install log file, which lists the location of each installed file.

Uninstalling, modifying, or repairing FileMaker Pro 11

You can use the Windows XP Add or Remove Programs control panel, or the Windows Vista or Windows 7 Programs and Features control panel, to uninstall FileMaker Pro, replace missing or corrupt files, or to change which features are installed. For more information, refer to Windows Help.

When you modify or repair FileMaker Pro, you may be prompted to enter your license key.

Changing the FileMaker Pro cache size

FileMaker Pro maintains an internal cache of portions of your database. Depending on your computer's memory configuration, you may want to adjust the cache size to improve performance.

You may want to consider increasing the cache size if you plan to:

- work on a large database file
- work on several database files at once
- host database files
- use a database file that contains many graphics
- insert a large graphic into a database file

Consider decreasing the cache size if you plan to run several applications at the same time and you have a limited amount of memory (RAM) installed.

Note When you increase or decrease the FileMaker Pro cache size, you also increase or decrease the amount of memory needed to run FileMaker Pro.

For more information on managing memory, see the documentation that came with your computer.

To change the cache size that FileMaker Pro uses:

1. In FileMaker Pro, choose Edit menu > Preferences.

The Preferences dialog box appears.

2. Click the Memory tab.

3. Type a number in the Attempt to set file cache to box, then click OK.

The next time you start FileMaker Pro, the new cache size is used.

Where to go from here

After you install FileMaker Pro, you can immediately begin working with the application. Here are some suggestions on where to go in the documentation to get started:

- If you're new to databases, read chapter 2, "Using databases" and chapter 3, "Creating databases" in the *FileMaker Pro User's Guide* to learn basic database concepts.

- If you're new to FileMaker Pro, work through the lessons in the *FileMaker Pro Tutorial*. The PDF file and sample file for the tutorial are located in the Tutorial folder inside the English Extras folder.

- If you've used FileMaker Pro before, read chapter 4, "New features," in this guide for an overview of new features available in FileMaker Pro 11.

- If you're a FileMaker Pro Advanced user, see the *FileMaker Pro Advanced Development Guide* and FileMaker Pro Help.

Chapter 3
Installing FileMaker Pro in the Mac OS

Before you begin the installation process, quit other open programs and save your work. For late-breaking information about FileMaker Pro, browse the contents of the DVD and view the Read Me file or visit www.filemaker.com.

Installation notes

Before you install FileMaker Pro, review the following notes:

- To install FileMaker Pro, you must have Administrator privileges and use the Administrator user name and password.

- If your computer is running virus protection software, turn it off prior to installing FileMaker Pro, and then turn it back on afterwards.

- During installation, you can choose whether to install all the program files (a Standard Install), or to install portions of the program (a Custom Install). For example, you may choose not to install certain features in order to save disk space.

- A Standard Install installs FileMaker Pro in the language matching your operating system. You can install additional language versions by choosing Custom Install, then selecting other language packs from the list of supported languages.

- Prior to an upgrade installation or software update, FileMaker software scans all hard drives and volumes connected to your system searching for previous versions. This scan may take several minutes if you have multiple drives or volumes.

■ You can also install FileMaker Pro using the command line or remotely using Apple Remote Desktop. For more information, see the *FileMaker Pro Network Install Setup Guide*.

■ If you have installed FileMaker Pro 11 Trial on your computer, you need to uninstall it before installing FileMaker Pro. For information about uninstalling FileMaker Pro, see "Uninstalling FileMaker Pro 11" on page 19.

Installing FileMaker Pro

You must use the installation program to install FileMaker Pro—you can't install FileMaker Pro by dragging files to your hard disk.

To install FileMaker Pro on your hard disk:

1. Do one of the following:

■ If you received your software electronically, after downloading the file, double-click the disk image icon (.dmg file).

■ If you are installing FileMaker using a DVD, insert the DVD into your DVD drive, and open the FileMaker DVD window.

2. Locate and double-click the FileMaker Pro installation icon.

FileMaker Pro installation icon

3. Install FileMaker Pro by following the onscreen instructions.

For additional details about installation, see "Installation notes" on page 17.

4. When the installation is complete, the Product Registration dialog box appears.

Registering FileMaker Pro

Please take a few moments to register your product. By registering your software, FileMaker will be able to assist you in recovering your license key if you ever lose it. You will also receive priority notification of software updates, upgrades, and special offers. Follow the prompts to provide your registration, product, and additional information.

If you are using the FileMaker Pro trial version, you must register your software prior to use.

You can also register by choosing Help menu > Register FileMaker Pro.

Viewing the installation log file

To view and save the installation log file, choose Window menu > Installer Log in the installer window. You can display both error messages and progress messages, only error messages, or all available installation messages.

Uninstalling FileMaker Pro 11

To uninstall FileMaker Pro 11:

1. Drag the FileMaker Pro 11 or FileMaker Pro 11 Advanced folder and all its contents from the Applications folder to the Trash.

2. Drag the FileMaker Pro or FileMaker Pro Advanced preferences file to the Trash.

The pathname for the preferences file is:

For FileMaker Pro: <home>/Library/Preferences/ com.filemaker.client.pro.plist

For FileMaker Pro Advanced: <home>/Library/Preferences/ com.filemaker.client.advanced.plist

Adjusting the FileMaker Pro cache

Because the Mac OS dynamically allocates memory to applications as needed, there is no way to set a specific amount of memory to allocate to the FileMaker Pro application. However, you can adjust the FileMaker Pro cache size.

You may want to increase the cache size if you plan to do any of the following:

- work on a large database file
- work on several database files at once
- host database files
- use a database file that contains many graphics
- insert a large graphic into a database file

Consider decreasing the cache size if you plan to run several applications at the same time and you have a limited amount of memory (RAM) installed.

To change the cache size that FileMaker Pro uses:

1. In FileMaker Pro, choose FileMaker Pro menu > Preferences and click the Memory tab.
2. Type a number in the Attempt to set file cache size to box, then click OK.

   The next time you start FileMaker Pro, the new cache size is used.

Where to go from here

After you install FileMaker Pro, you can immediately begin working with the application. Here are some suggestions on where to go in the documentation to get started:

- If you're new to databases, read chapter 2, "Using databases" and chapter 3, "Creating databases" in the *FileMaker Pro User's Guide* to learn basic database concepts.
- If you're new to FileMaker Pro, work through the lessons in the *FileMaker Pro Tutorial*. The tutorial PDF file and sample file are located in the Tutorial folder inside the English Extras folder.
- If you've used FileMaker Pro before, read chapter 4, "New features," in this guide for an overview of new features available in FileMaker Pro 11.
- If you're a FileMaker Pro Advanced user, see the *FileMaker Pro Advanced Development Guide* and FileMaker Pro Help.

Chapter 4
New features

This chapter provides you with an overview of the new features and improvements in FileMaker Pro 11. Unless otherwise noted, please see FileMaker Pro Help for more information on these features.

Improved reporting and analysis

- FileMaker charts – Compare and contrast data graphically in bar, line, area, and pie charts using an integrated charting tool.

- Layout folders – Create folders to group layouts; rename, duplicate, and delete layouts; and choose to display layouts and folders in the Layout pop-up menu—all in the Manage Layouts dialog box.

- Default layout view – Set the default view (Form, List, Table) that you want to appear when you first open a layout.

- Enhanced New Layout/Report assistant – The assistant now offers a more streamlined approach for grouping data and creating summary reports.

Integration with other applications and data sources

- Recurring import – Automatically import data from Microsoft Excel or other data sources, such as Tab and CSV, into FileMaker Pro 11. Updates in the source file are reflected in the FileMaker Pro table.

- Enhanced support for Bento data import (Mac OS) – Import Bento date and timestamp formats into FileMaker Pro and then reformat the data as a FileMaker Pro date or timestamp. You can also import encrypted and simple list fields from a Bento data source.

- Instant Web Publishing – Databases published on the web through Instant Web Publishing include a status toolbar similar to the one you use when you work with databases in FileMaker Pro. FileMaker charts can be published using Instant Web Publishing.

Improved usability

- Work with data in a spreadsheet-like format – You can add fields and records in Table View using a familiar, spreadsheet-like format. Sort, delete, and hide fields; change a field's data type; and set field options. You can also create a quick report by adding a leading or trailing group by field—all from Table View.

- Quick find – You can search across all the fields on a layout in Browse mode.

- Inspector – Most editing tasks that you do in Layout mode can be done with the Inspector, which allows you to view and modify object settings in one convenient place.

- Portal filtering – Add a filter to a portal to specify the related records that are shown in a portal.

- Clear recent files – Clear the names of files you recently opened using the Clear Recent Files command in the File menu.

- Snapshot link – Capture and preserve a found set of record IDs— including the layout, view, and sort order—exactly as it was when you performed the original find request, and email it to another person.

- Text highlight – You can apply a highlight to easily identify key text in your layouts.

- Enhanced Quick Start Screen – Use the Quick Start Screen to quickly create, convert, open, and manage local, remote, and favorite files. You can also access tutorials and other helpful resources, such as the FileMaker Forum.

Application fundamentals

- Refined security – As part of your overall security plan, you can control whether other FileMaker Pro files are permitted to access the schema (including the tables, layouts, scripts, and value lists) in a file in your secured solution, and prevent versions of FileMaker Pro earlier than version 11 from opening the file.

- Use variables in scripted find requests – You can include local and global variables in scripted find requests that you create or edit.

- Merge variables on layouts – Create a merge variable that displays values from local or global variables. You can use merge variables for some tasks in place of global fields or unstored calculation fields.

- TLS support for sending mail via SMTP – When you send email via SMTP, you can choose TLS (Transport Layer Security) encryption to allow both secure and nonsecure connections over the same port.

Script steps, script triggers, and functions

- Script selection and editing improvements:

  - The Specify Script dialog box has buttons that allow you to add, edit, duplicate, and delete scripts.

  - In Windows, you can move the scripting windows outside the FileMaker Pro application window. Menus inside these scripting windows allow you to manage and edit your scripts.

- Origination information – In Help, each script step, script trigger, and function description includes the version of FileMaker Pro in which it was created.

- Open Manage Layouts script step – Displays the Manage Layouts dialog box.

- Perform Quick Find script step – Finds records that match one or more search words based on text that you specify or on text returned by a calculation function.

- Save Records As Snapshot Link script step – Saves a set of found records to a FileMaker Pro Snapshot Link (FPSL) file.

- OnLayoutExit script trigger – Triggers a script to run before a layout is exited.

- OnObjectValidate script trigger – Triggers a script to run before an active object has been validated and saved.

- OnViewChange script trigger – Triggers a script to run when the view (Form, List, Table) has changed.

- Get(AccountPrivilegeSetName) function – Returns the name of the privilege set that is being used by the account used to open the database.

- Get(AccountExtendedPrivileges) function – Returns a list of keywords for the enabled extended privileges, separated by carriage returns. The list that is returned is based on the account used to open the database file.

- Get(QuickFindText) function – Returns the text that the user enters in the Quick Find box.

- The following function and script trigger names have been changed:

    - Get(PrivilegeSetName) function is now Get(CurrentPrivilegeSetName)

    - Get(ExtendedPrivileges) function is now Get(CurrentExtendedPrivileges)

    - Get(PortalRowNumber) function is now Get(ActivePortalRowNumber)

    - OnLayoutLoad script trigger is now OnLayoutEnter

Changed features

- Enhanced user interface (Mac OS) – The appearance and behavior of Mac OS dialog boxes have changed in order to better reflect Mac OS X standards.

- "Available menu commands" setting in default privilege set – To further refine security, the setting for "Available menu commands" in the default privilege set (which you use when creating a new privilege set) is now Minimum.

FileMaker Pro 11 Advanced

- Custom menu user interface improvements – The user interface has been enhanced in order to make creating and managing custom menus and custom menu sets easier and more intuitive.

- Custom function copy/paste/import – You can copy, paste, and import custom functions in the custom functions list; and copy, paste, and import custom functions between files.

- Enhanced Script Debugger – Debug scripts called by buttons and custom menu items.