

EFFICY DESIGNER BASICS TRAINING

Scope

This hands-on training presents the basic features in the Efficacy Designer.

It teaches the participants to configure an empty Efficacy database in order to allow them to **customize their database** to their company's need.

It does **not** cover database creation and management, creation of new entities, calculated fields and visual workflow. The customization of the html pages (e.g. to change the fields displayed in the top part of the screens) **cannot be done** with the Designer - it is covered by the training "Custom HTML".

Target

Key users and database administrators with experience with Efficacy.

Required knowledge and aptitudes

IT-mindedness is required but no specific technical skill is needed. Knowledge of the Efficacy database fields and data model is necessary. Knowledge of English is needed for the training.

Number of participants

Minimum 2, maximum 6.

Duration

4 hours

Contents

- Introduction
 - The Efficacy data model
- About Database management
 - About creating databases
 - About licenses
- Field management
 - Panels vs. Categories
 - Types of fields
 - Adding a field in the main table
 - Adding a field in a category
 - Associated fields
 - *[depending on the level of the participants: Creating a master-detail relation]*
- Content management
 - Managing Lookup tables
 - Creating References
 - Translations
- User management
 - Creating Resources
 - Creating a new User
 - Creating and configuring Groups

- Permissions management
 - Rights vs. Securities
 - Privileges
 - Table rights
 - Securities
 - List sharing
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Training support

On-screen PowerPoint presentation and live use of a standard Efficy database

The trainees use online handouts of the presentation during the training. These online handouts are available through the Efficy Helpdesk.

Upon request, printed versions of these handouts can be provided for use during the training. For environmental reasons, this service will be charged.

On-line manuals are available on <http://edn.efficy.com>

Available languages

The presentation and hand-outs are in English. Trainers can give the training in English, Dutch or French.

Certificate

This training and about a month of practice suffice to attend the Efficy Designer Basics Exam in order to obtain the Efficy Designer Basics Certificate.
