

## EFFICACY QUERIES TRAINING

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### Scope

This hands-on training on a standard Efficacy training database presents the Query Tool. It teaches the participants to create, run and share Queries on the database in order to get the most out of their company's data.

It does **not** cover SQL-queries.

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### Target

End users who master the basic Efficacy features – ideally, with a month's experience using Efficacy in order to make this training more effective.

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### Required knowledge and aptitudes

Knowledge of the Efficacy database fields and data model is necessary.

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### Number of participants

Minimum 2, maximum 6.

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### Duration

4 hours

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### Contents

- Introduction
  - Efficacy's data model
    - Standard fields vs. custom fields
    - Main tables, secondary tables and relation tables
  - What is a query?
- Creating a Query
  - Choosing and linking tables
  - Selecting fields
  - Order of the fields
  - Formulating Criteria
  - Sorting records
- Testing, saving, editing the Query
- Advanced features
  - Importance of the order in which you link tables
  - Option « modify parameters »
  - Combining criteria with OR
  - Joins
  - Special Field: active link
  - Special Parameters: username – today
- Using a Query
  - Exporting a Query
  - Sharing a Query

- Queryviews (custom views on lists)
  - Reports
    - Running a report
    - Subscribing to a report
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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://help.efficy.com>

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### Available languages

The training can be given in English, French, Dutch or German.

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### Certificate

Not available yet.

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