

Query Design 2

Updated Jul 22, 2021

As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#), and head to [Veracross University](#) for the latest onboarding training. Please update your bookmarks.

Overview

Anyone using Axiom needs to have a basic understanding of query design. Here is the second part of our basic query training.

Demo Database: Comprehension questions and tasks follow each video. You can use your own school's database or our "Learn" demo database, the URL and credentials for which are listed in our customer support portal (separate login required). Contact your school's point person or your Veracross account manager with questions.

"Or" Queries

After watching this video:

1. Try recreating the Find Relationships query in the video to search for parents with emergency, pick up, or medical authorization. Save it to your workspace as "Parents With EPM Permissions"
2. Let's say you want to look for all "irregular" class enrollments that have a date withdrawn or late date enrolled. Create that query, sort and subtotal as appropriate, and save it as something of your choice in your workspace.

Advanced Display Options

After watching this video:

If you do not use the Veracross Development module, use the demo database for this.

1. Run a Find Gifts query on the Development homepage. Rename the following fields:
 - Constituent --> Name
 - Primary Development Role --> PDR
 - Amount --> \$
 - Gift Type --> Type (Donation, Pledge, Donations Soft Credit, Pledge Installment, Pledge Soft Credit)
2. Return to the Find Gifts query.
 - Update the date field to just show the month. Rename the field to "Month"
 - Duplicate the date field and make the second instance just show the year and rename it to "Year." (i.e., there will be two separate date fields, one that shows the month and one that

- shows the year)
- While you are at it, restrict the gift type to donations and rename the Gift Type field back to its original name. Run the query.
3. Add some column groups.
 - Create two or three column groups that logically group the fields together. You may rearrange the fields as needed. For instance, you could group the first several columns in a group called "Gift Info."
 - Run the query.
 4. Change the background of the Payment Method field to something that stands out. Run the query.
 5. Freeze the pane after the constituent's name. Save this query to your workspace.

Pre-Built Queries and "Popping Out" Queries

After watching this video:

1. How can the URL guide you? What do the /query/ and /results/ URL mean?
2. Is the Review Class Configuration a query?
3. What does it mean to start with a pre-built query and then design the actual query you want?
4. What does it mean to "pop out" a query? Why is it so helpful?
5. Let's say you are on a class detail screen and want to get a quick list of student email addresses.
 - Find any class and pop out the roster. Design the new query and pull in the email address.
 - Could you then send an email to these students with Composer? What else would you need

to do to the query to be able to email them?

Example: Find Relationships

After watching this video:

1. What are relationships in Veracross? What information do relationship records contain?
2. Try creating your own Find Relationships query.

Example: Field as Criteria Value

After watching this video:

1. Create a query that looks for anyone who has identical Email 1 and Email 2 addresses.

Webinar: Function Fields

For your additional Axiom edification, check out this webinar on function fields.

Webinar: Shortcuts and Efficiencies in Axiom

Ready to zip through Axiom like a bottlenose dolphin through the cerulean sea? Watch this webinar on shortcuts in Axiom.

