



12 Ways to Optimize Your Visual Intercept Workspace

Both Visual Intercept Enterprise Desktop and Visual Intercept Enterprise Web include a number of options that allow you to configure how the environment displays and loads Incident and other types of Visual Intercept data. If you understand how these options work, and how to use them together, you can make your work much more efficient – particularly if your Incident throughput is high. This month's Tech Tip describes some options and features you may have overlooked in Visual Intercept and how to use them to save you time and effort.

Possible Optimization Techniques

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1. Define more effective startup filters

Visual Intercept Desktop

Visual Intercept Web

Visual Intercept Web Relay

When you first start using Visual Intercept you are likely to have very few Incidents and Projects in the database. At that stage having Intercept configured to fetch all documents works well. However, as you begin to register more Incidents, close Incidents, and add more users to the system, it's a good idea to configure the system to fetch only those documents relevant to your work, e.g., open Incidents assigned to you or Incidents you have registered.

To accomplish this, Visual Intercept allows you to set startup filters based on the queries you have built. To set your startup filters in the desktop product, select **Tools | Options** from the menu bar and click on the **Queries** tab. Here you can place a check next to the queries you want to execute on startup.

2. Set the Fetch All Detail option

Visual Intercept Desktop

One of the characteristic features of Visual Intercept is the ability to build document-to-document relationships, e.g., the ability to create Incident to Incident relationships or relate Contacts to Incidents. Visual Intercept can build and display these relationships in the Visual Intercept Browser. However, fetching and building these additional relationships is very resource intensive. As a result, Intercept is designed only to fetch this type of related data if the user accesses a part of the application that requires it. That is unless the Fetch All Detail option is on. If you have Intercept configured to fetch large numbers of Incidents, turn this option off for better performance. If you have Intercept configured to fetch a select set of Incidents, 50 to 100, turn this option on to allow the Visual Intercept Browser to display document-to-document relationships.

3. Use the Restore Workspace option

Visual Intercept Desktop

Visual Intercept provides a Restore Workspace option that allows you to have the application restore the state of the document and query result windows at the time you exit the application. There is a very useful way to use this option to have Intercept restore a particular window arrangement no matter how you re-arrange those windows during any particular session. Using this option is very useful if there are particular types of data you want to see every time you load Visual Intercept.

- Set your startup queries in your Option and execute the queries that fetch the data you want to have displayed, e.g., Incidents assigned to you, Incidents you have registered, closed Incidents, and open incidents.
- Arrange the query result windows in the manner that you always want to have them displayed.
- Turn the Restore Workspace option on and exit Visual Intercept. This will save the current configuration.
- Launch Visual Intercept and turn the Restore Workspace option off. Turning the option off will preserve the window configuration you created.

4. Turn the Aggregate Result Sets option

Visual Intercept Desktop

When this option is off Intercept will re-build the color coding and data relationships in the Browser or Explorer each time a query is run. This is particularly useful when you want to toggle between multiple views of Incidents by Project, e.g., your assigned incidents versus your requested incidents. You can also toggle this option on and off by pressing the Shift key when you execute a query.

5. Use F5 when working with the Browser and Explorer

Visual Intercept Desktop

If you like to run several queries in succession when using Intercept or re-execute a single query, think about using the F5 button. Within the context of Intercept, the F5 button will execute the currently selected query. Also, try using the F5 button in conjunction with the Aggregate Result Sets option off to quickly view projects where particular types of Incidents are located.

6. Set default values for new Incidents

Visual Intercept Desktop

In the Visual Intercept Options, use the settings in the Values tab to set the default attributes for new Incidents. For example, if most of the Incidents you create are defects this would prevent you from having to set that field to a particular value every time.

7. Use \$PROMPT queries

Visual Intercept Desktop

Visual Intercept Queries that use the \$PROMPT macro prompt you for new search values each time they are run. This macro can be extremely useful in building keyword searches and searches by ID. See our [December 2001 Tech Tip](#) for detailed information on using this macro.

8. Use \$USERID queries

Visual Intercept Desktop

Visual Intercept Web

Visual Intercept Web Relay

Visual Intercept Project

Visual Intercept Queries that use the \$USERID macro can fetch documents based on your current user ID. This macros can be extremely useful for searches that use the currently logged on userID.

9. Use Intercept's Mass-Update feature

Visual Intercept Desktop

Because it is so unobtrusive some users never notice Visual Intercept's Mass-Update capability. This feature lets you modify any document attribute for multiple documents at the same time. Open a list of Incidents, select several incidents right click on the column header for the attribute you want to modify, and the Mass-Update popup menu will appear. This feature will not only save you time, it will also help you maintain the quality of your data.

10. Use extended column sorting

Visual Intercept Desktop

Sometimes Visual Intercept users are not aware that they can sort multiple columns in list views. To establish a secondary sort in a list view, hold down the shift button as you select an additional column.

11. Modify column display settings

Visual Intercept Desktop

Visual Intercept Web

Visual Intercept Web Relay

In the Options menu of Visual Intercept Web and in the Customize section of the Tools menu in Visual Intercept Desktop, you can set options that determine what columns are displayed and in what order.

12. Create a new window to perform comparative work on a single Incident

Visual Intercept Desktop

You may already realize that Visual Intercept's multi-document interface makes it superior for the kind of comparative work that is so common to incident management. What you may not realize is that you can also display multiple views of the same incident. Let's say you wanted to view the source code related to an Incident and the developer's Resolution notes. With the Incident selected, select **Window | New Window** from the **Menu** bar. Performing this action will open a new copy of the same Incident document that you can use to view other information. Actually, you can use this feature for all Visual Intercept document types and you can open as many copies as you like.

These useful options are sometimes overlooked. So, if the default options don't suit the kind of work you are doing you can change them at any time.