

Managing Personal, Shared, and Hidden Queries

Document ID: Q000069

Last Revised On: March 31, 2008

This article applies to the following:

Product Version: IssueNet 4.0 and later

Component(s): Administrator, Manager

Solutions(s): All

As an organization incorporates more users, more business processes, and a higher volume of issues and tasks in an IssueNet solution, users develop specialized queries for their reporting needs. In addition to providing users with lists of issues, tasks, and other items, the IssueNet Platform uses queries to support features such as dynamic dropdown lists, reports, and notification rules.

Accordingly, the number of queries in an IssueNet instance can grow significantly over time, and clutter the average user's environment. Navigating through long lists of queries that are irrelevant to the task at hand can be a nuisance and a waste of time.

Fortunately, the IssueNet Platform was designed with query management features that allow visibility to be determined by the query's function as well as the user's role. By keeping these options in mind when creating or editing queries you can limit query clutter and allow users to more effectively manage their own personal query groups.

Personal and Shared Queries

Queries can be created in the IssueNet Manager or the Administrator. When a query is created, the user who created it is set as the owner of the query. Queries also have a visibility property which indicates whether it is personal or shared. When creating a query in a client, such as the IssueNet Manager, a new query's visibility is automatically set as personal - only visible to its owner.

However, once a query has been created, an Administrator can make the query visible to all users by setting its visibility to shared. To share a personal query, a member of the administrator's group can logon to the IssueNet Administrator, open the query, and set the visibility to shared.

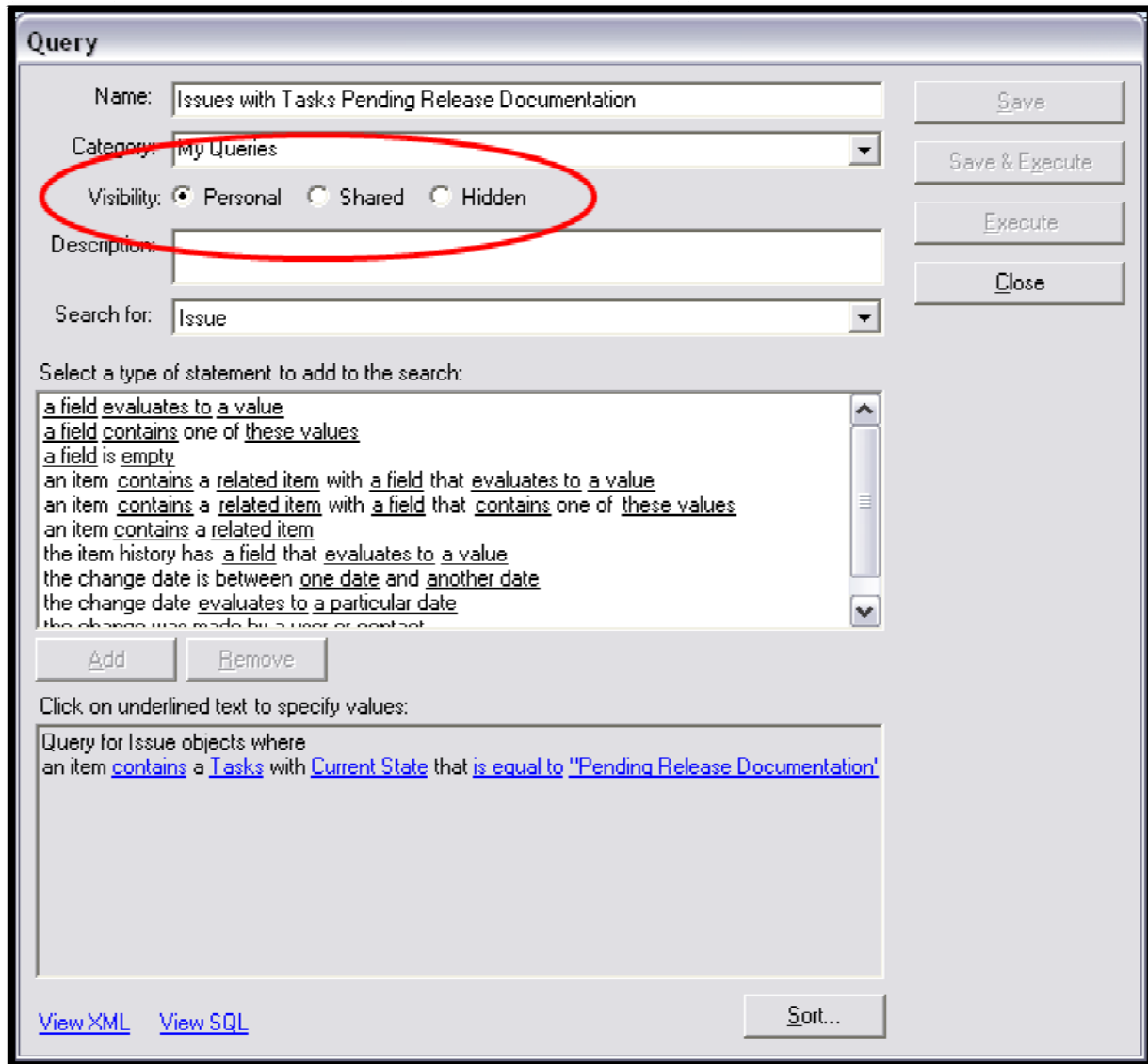


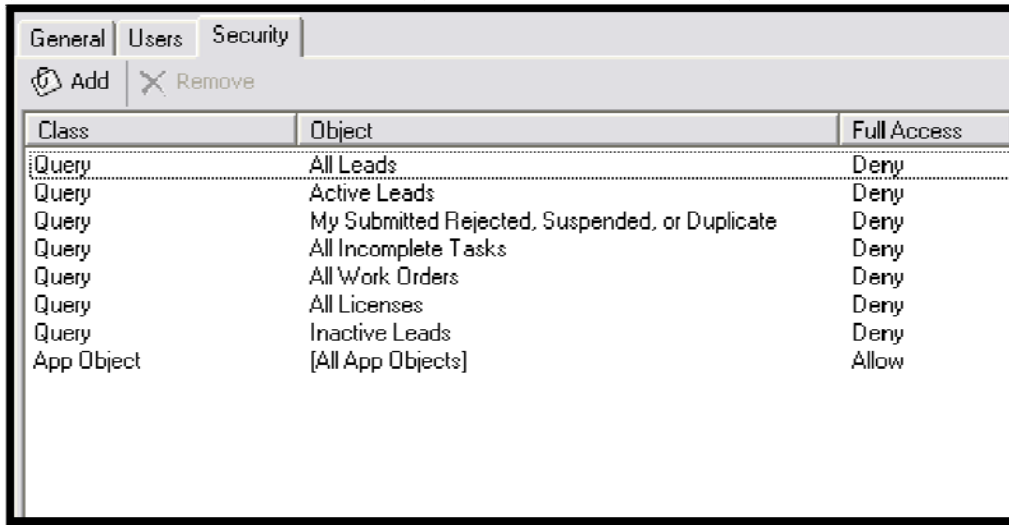
Figure 1: Query visibility options can be set using the Query Builder in the IssueNet Administrator.

Limiting Query Visibility by Group

The visibility of shared queries can be further limited to specific IssueNet groups. For example, in an issue tracking database used to manage product support and software development issues, members of the support team may prefer to not see queries shared by the QA team and vice versa.

To limit a query's visibility based on group membership, open the group and create security settings on the queries to which you want to restrict access. In the following screen capture security settings are used to hide several queries from a support group. When using the permissions wizard you can select multiple items. So the simplest way to establish the shared queries for a group is to multi-select the

queries you want to hide and then select the option to deny all permissions in the Permissions Access panel of the Permissions Wizard.



The screenshot shows the 'Security' tab of a permissions wizard. It features a table with three columns: 'Class', 'Object', and 'Full Access'. The table lists several query objects with 'Deny' permissions, and one application object with 'Allow' permissions. Above the table are 'Add' and 'Remove' buttons.

Class	Object	Full Access
Query	All Leads	Deny
Query	Active Leads	Deny
Query	My Submitted Rejected, Suspended, or Duplicate	Deny
Query	All Incomplete Tasks	Deny
Query	All Work Orders	Deny
Query	All Licenses	Deny
Query	Inactive Leads	Deny
App Object	[All App Objects]	Allow

Figure 2: Permissions can be set for each group to control query visibility.

Hidden Queries

In some instance there are queries you would prefer to have visible to no users. These are queries that are used in query item lists, reports, and notification variables. For example, you may use a query which returns Contacts that have the category “Employee” as a part of a query item list. The query item list is valuable because it allows you to have a drop down list that only contains contacts from your company. However, the query itself would be useless and a distraction for most or all users. To hide a query from everyone, select the Hidden option when creating or editing the query. Once it is set to hidden the query will only be visible to the Administrator user.

Conclusion

Attention to query visibility options when creating and sharing queries can greatly increase the ease of use of your IssueNet solution. Take a few minutes to review the queries that load when your users logon. If you find the query list too large or full of queries your users never use, implement some visibility rules and delete old queries that are no longer useful. Using these options consistently will allow your users to take full advantage of shared queries while keeping them manageable.

Additional Resources:

- [Queries \(IssueNet Online Help\)](#) – Documentation for queries and the Query Builder
- [Using Prompt Queries \(Tech Tip\)](#) - Prompt queries allow you to have saved queries of any complexity which will prompt you for search values each time the query is executed.