

## How to create your own custom queries PTC Integrity.

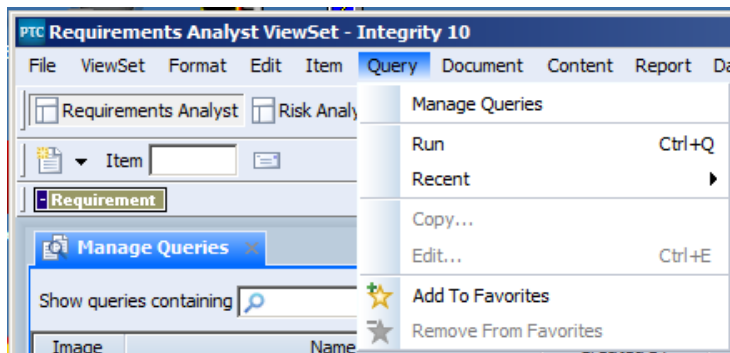
by  
Steve Lundy

Often times when I am using PTC Integrity I am performing the same or similar tasks over and over again. By default PTC Integrity offers you something called your Quick Query where you can save a query and run it over and over again. But what if one query you can save, just isn't enough? What if I need to keep track of the results of several different queries at the same time and there isn't a convenient Administrator provided query that will do the job on your PTC Integrity Server?

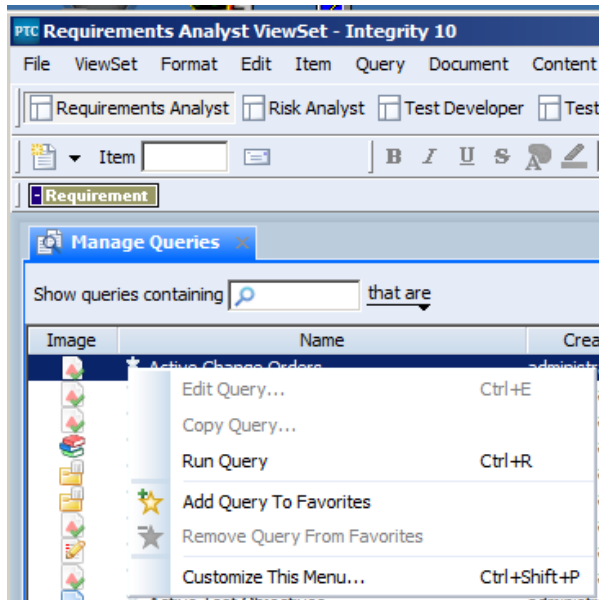
This is where custom queries come in. In this article I will show you how you can customize your PTC Integrity ViewSet to give yourself the ability to create custom queries. Then I will walk through the process of creating a new custom query and saving it to PTC Integrity so it is there for your future use. I will even show you how you can share your query creations with other users on your PTC Integrity server.

Sometimes though on some PTC Integrity servers, the ability to create these custom queries has been denied to the ordinary users. If that is the case with your server, you will need to contact your local PTC Integrity Administrator to determine if those permissions can be granted.

- 1) The first you need to do is to check to see if the Create Query option is available to you either when you select the Query menu....



or right click on the Manage Queries window in your PTC Integrity Client.

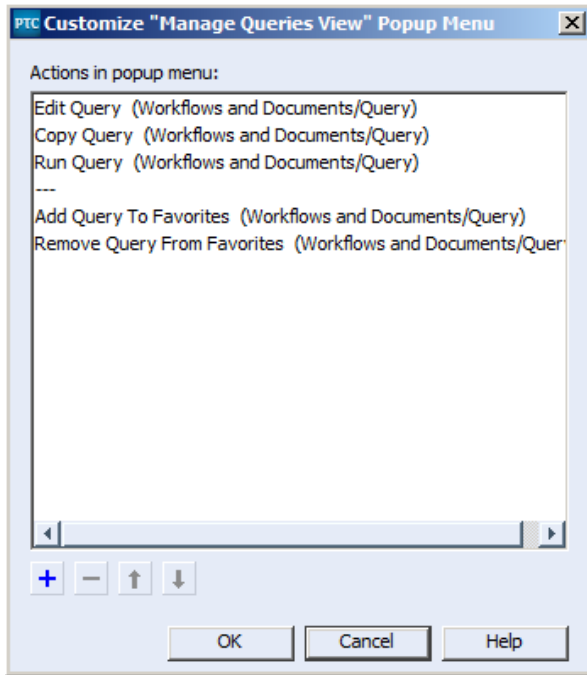


- 2) Since "Create Query..." is not one of the available menu options in either location, it needs to be added. In this case I will add the new menu item as part of the context menu on the Manage Queries window. I select "Customize This Menu..." to start things off.
- 3) This opens the 'Customize "Manage Queries View" Popup Menu' dialog. Select the blue plus "+" sign at the bottom left hand side of the dialog.

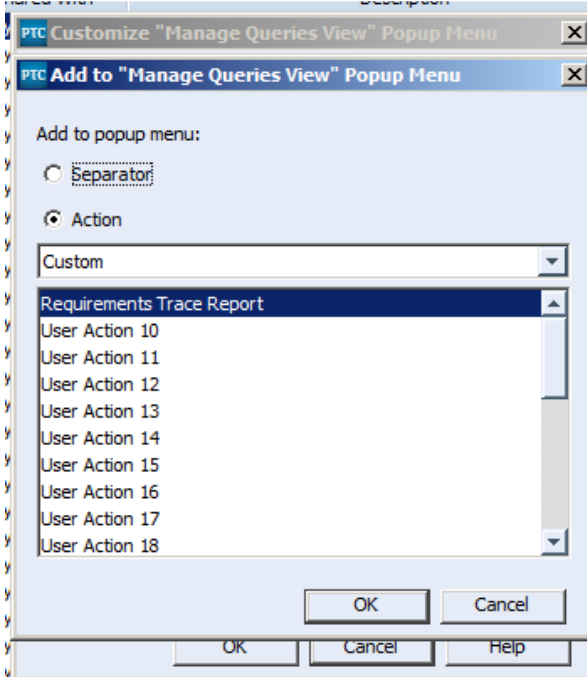


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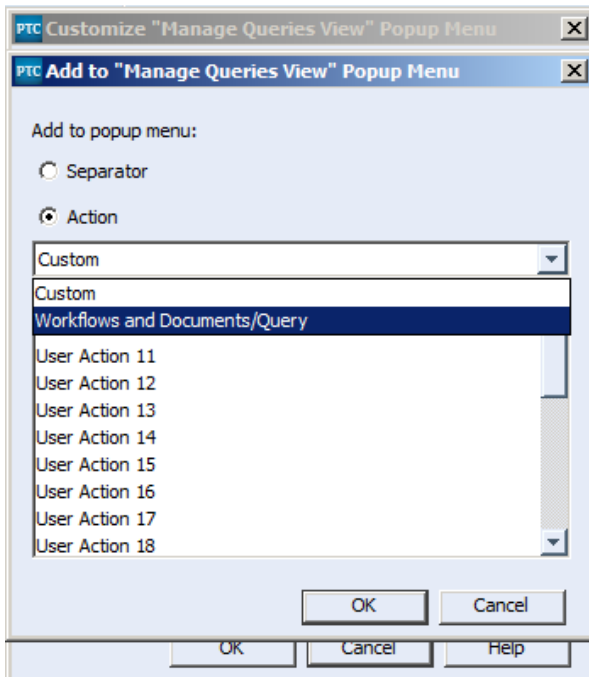
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4) This will open the 'Add to "Manage Queries View" Popup Menu dialog:



- 5) Select the Action Radio button and Workflows and Documents/Query from the dropdown list:

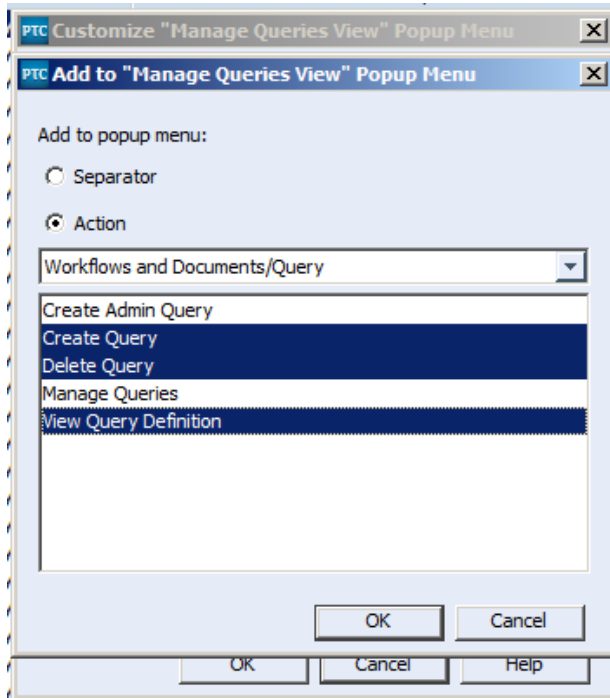


- 6) This will display a list of unused menu items you can potentially add to the "Manage Queries View" popup menu. Select "Create Query", "Delete Query," and "View Query Definition" before selecting the "OK" button.



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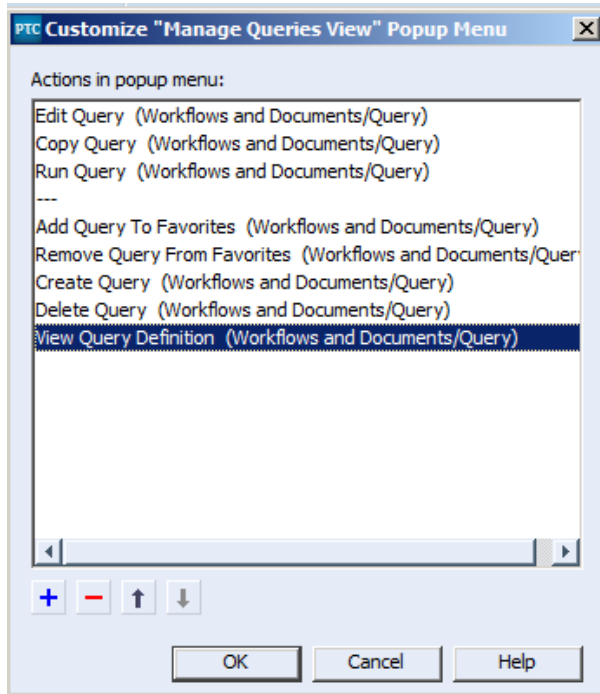


- 7) The selected items have now been appended to the bottom of the list of menu items on the 'Customize "Manage Queries View" Popup Menu'

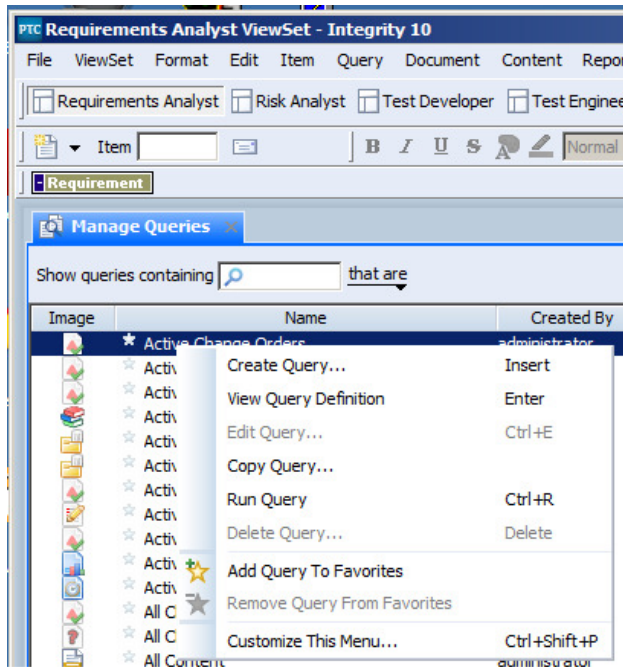


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- 8) If you wish, you can use the up and down arrow buttons on this dialog to re-arrange your menu items into something you find more user-friendly. Once this is complete, select the OK button again to commit your changes. Now when you right-click on the Manage Queries window the menu displayed will have the necessary selections to allow you to create, edit and remove custom queries.

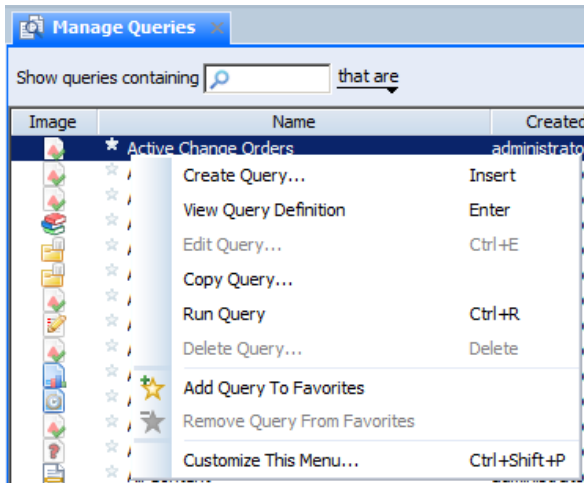


Of course this is only the first part of the process. Once you have the ability to create your own custom queries, you need to know how to go about actually creating them.

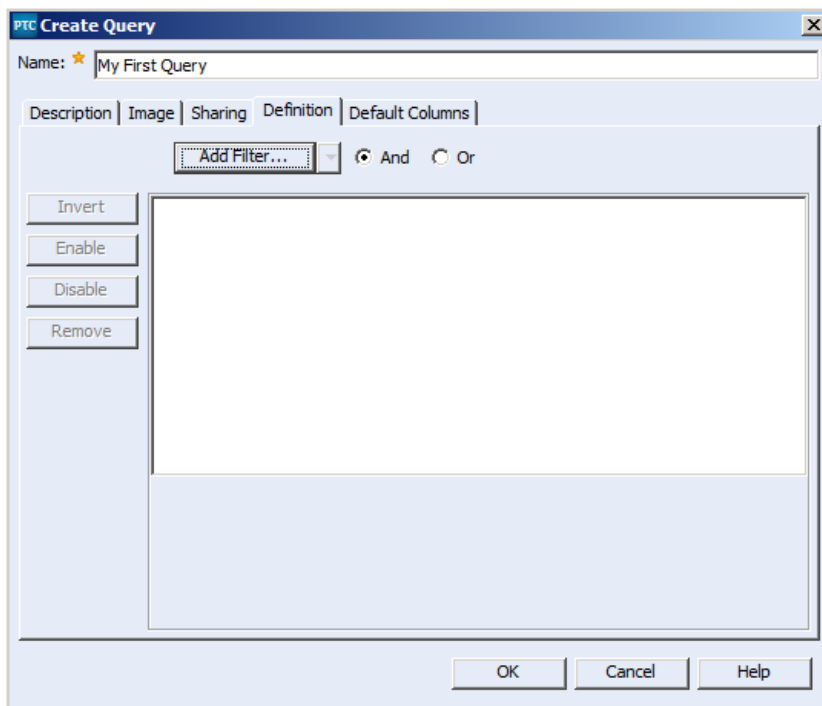
*NOTE: Poorly structured queries can have a negative impact on the performance of the PTC Integrity Server. If you are trying to build a complex query, and are unsure of how, please contact your local PTC Integrity Administrator for assistance in setting it up.*

Perform the following steps to create a new query

1. To create a new custom query, open your Manage Queries window, right click and select "Create Query..."

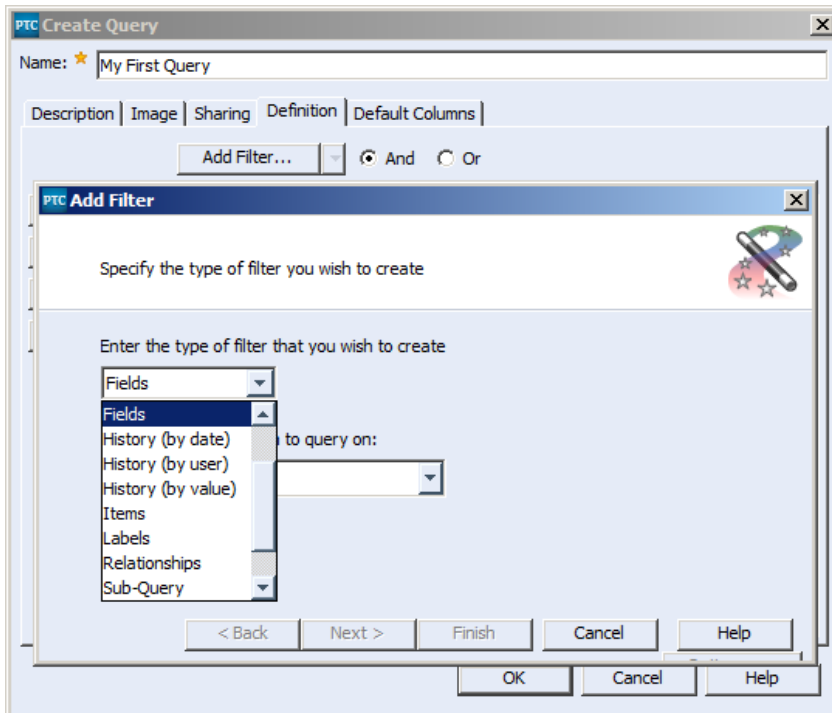


2. This will open the Create Query dialog window. From here you can give your query a name, and define the criteria of the query.





3. You can use the Add Filter button to create the specific criteria that your query will send to the database to retrieve items. The criteria can be based on a number of different things, but in this example we will base our criteria on simple field values.

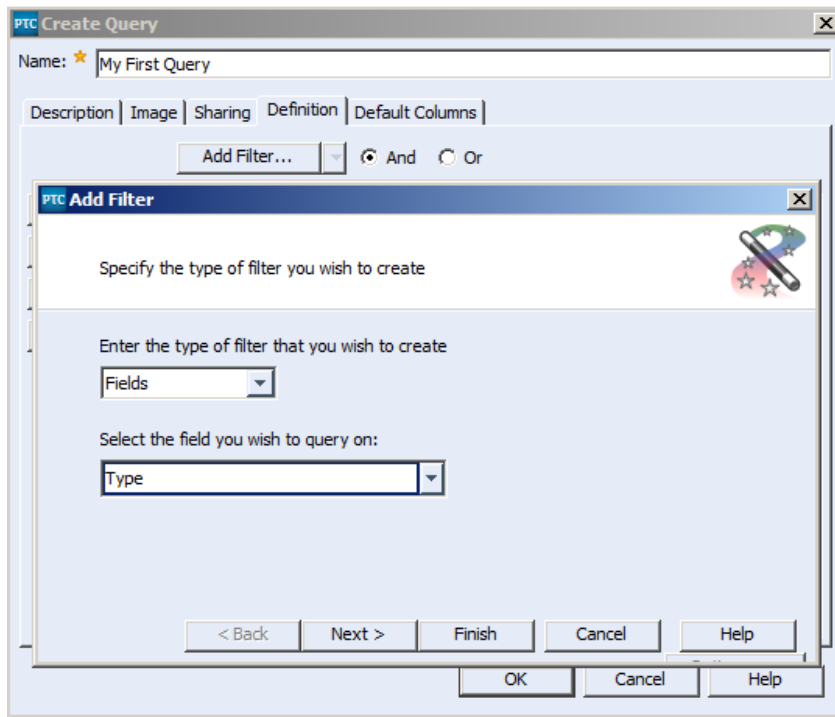


4. Select a field that you want to perform a query on and the value you want to find within that field. In this case I'll select "Type."

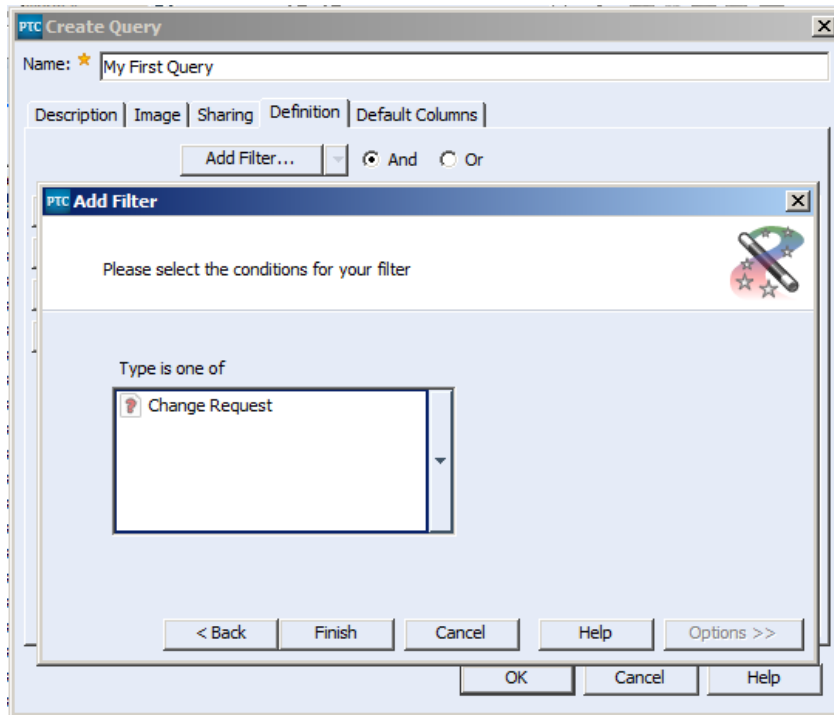


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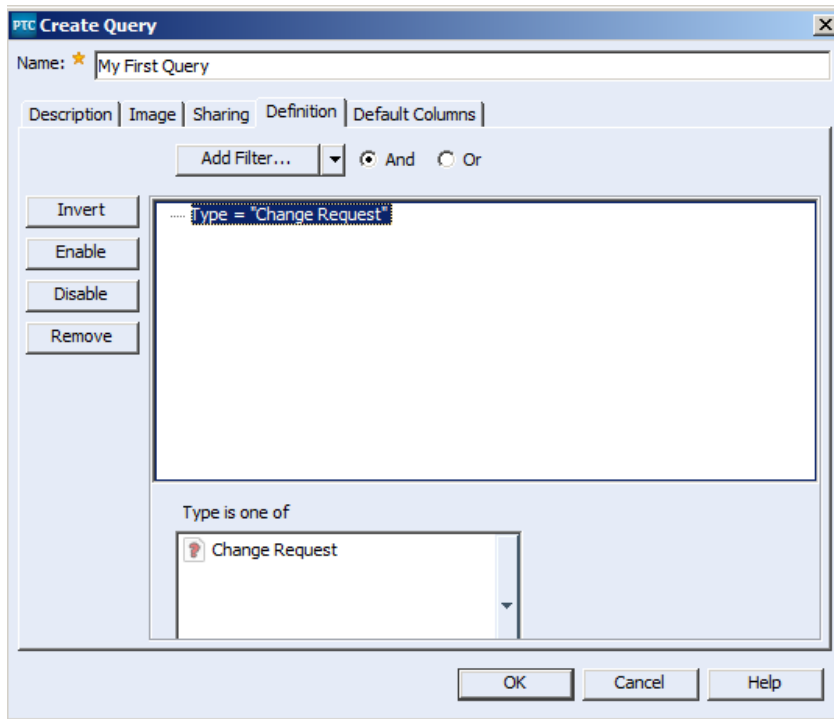
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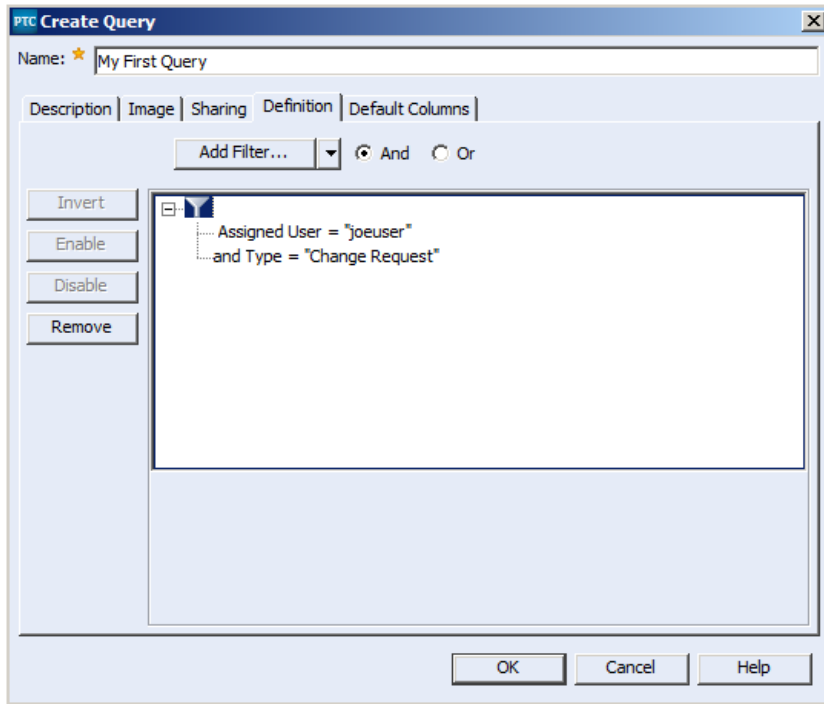
5. Then I'll Click next and choose what I want to see in that field....



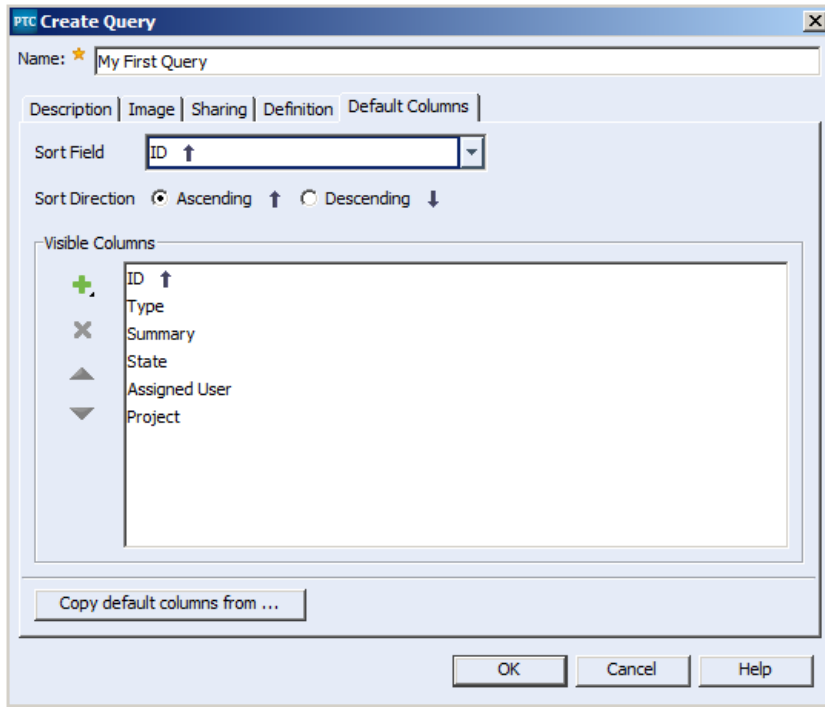
6. And then I click Finish to add that filter criteria to my query.



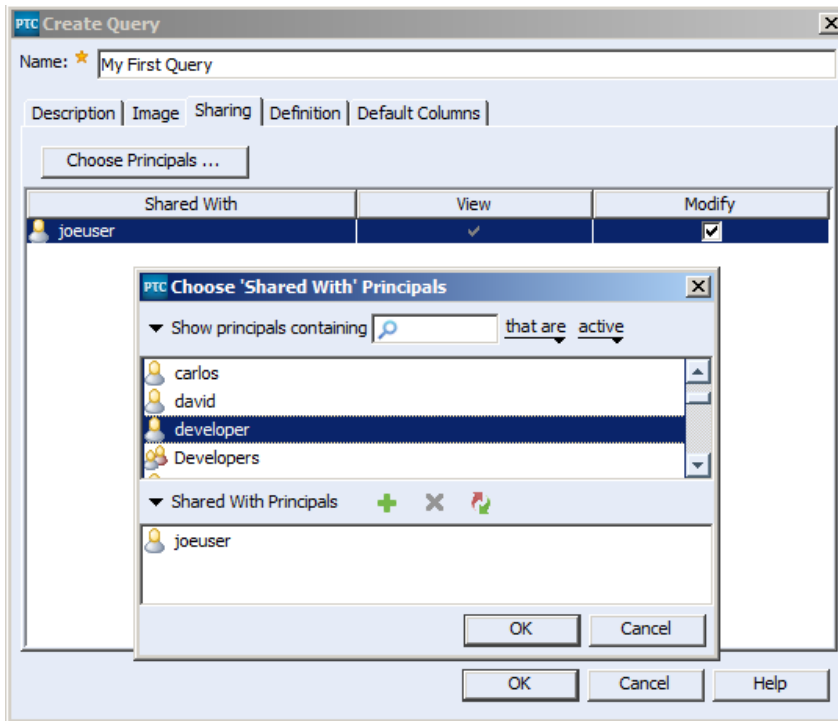
7. You can add other filter criteria to your filter as well, and based on the And/Or radio buttons adjacent to the Add Filter button. This will determine how the criteria will be submitted to the database. In my example the query will return each item from the database, where the item type is "Change Request" and the Assigned User field contains "joeuser."



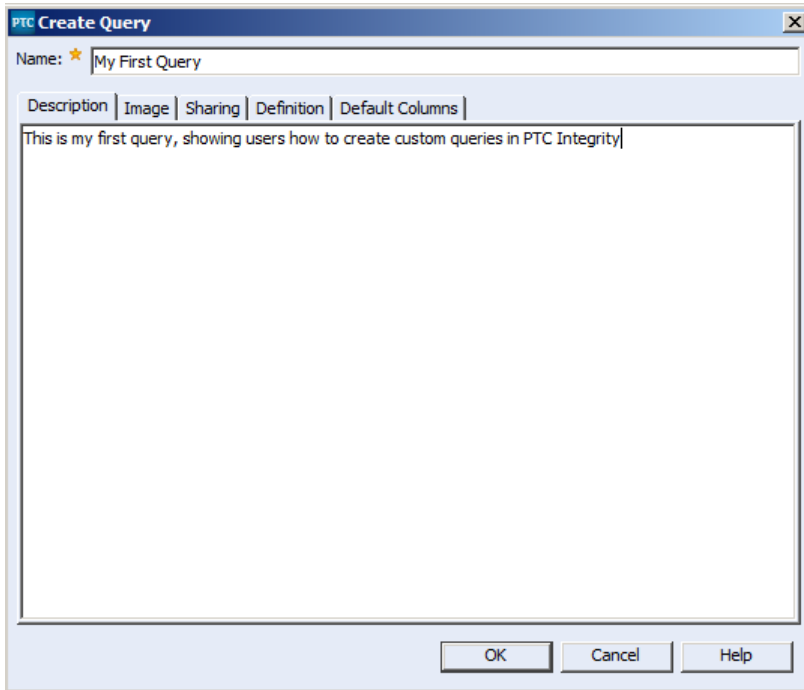
8. The Default Columns tab on the Create Query dialog window is used to determine what columns are fields are displayed as part of the query results, when the query is executed. What you see below is the set of default fields that are included with every new query created. You can add and Remove fields from this list by using the by using the “+” and the “x”. You can re-order how the columns are displayed by using the up and down arrows to move individual fields higher and lower in the list.



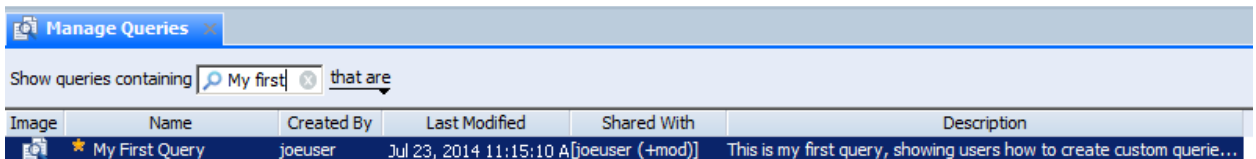
9. The Sharing tab, allows you to share the query you have just created to specific individuals or groups. This is handy if, say, you have a team of users who often share work items between each other. It is handy for that local team to have a common set of queries that they can all execute so they can see a common view of the database. You can set who can see your query, as well as who can edit the query. (Handy, if the query needs to be updated and you are unavailable for some reason). By default if you do nothing with this tab, the query will be created, visible only to you, and editable only by you.



10. The Description and Image tabs are useful in helping to define and describe the new query as it is displayed on your Manage Queries list. When you are sharing queries, it is a best practice to provide a brief but descriptive description of what your query does.



- Once you select “OK” the new query is created and added to your Manage Queries list. If you have shared this query with other users, they will also see this query in their Manage Queries list as well. Users or group members to whom this query has not been shared to will not even know the query exists.



Creating custom queries on a PTC Integrity server can be a handy and powerful feature to enable users and groups to do their jobs more effectively. But as a note of caution, poorly structured queries can cause a negative impact on performance of your PTC Integrity server. If you are unsure of how to properly structure your query, please contact your local PTC Integrity administrator for assistance.