

Administering Custom Queries

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Custom queries create Excel downloads of DevResults data as you want it presented, and can be run on-demand. You'll work with one of our Data Scientists to confirm what you need, we'll write it for you, and then save it in your site for you to run whenever you need it. This page walks you through how to request a custom query and set up appropriate permissions for other users to access it.

Requesting a New Custom Query

To request a new custom query, follow these steps:

1. Download [this template](#) .
2. In the first row, enter the column headings as you'd like them to appear in the query.
3. In the second row, tell us which page in the site this information should come from (e.g. All Activities, Activity Overview, Activity Geography, Indicator Definition, etc.)
4. In the third row, tell us which field on that page the information should come from (e.g. Code, Reference #, Title, Tags, etc.)
5. Email this template to help@devresults.com with subject line: Custom Query Request. Let us know which DevResults site you want the query for and what you want the query to be named.
6. We will review your request and get back to you with any clarifying questions, build the query, and make it available in your site.

Please note: in general, it takes us at least 10 business days between your initial request and return of a finalized custom query.

Who Can View or Use the Custom Query?

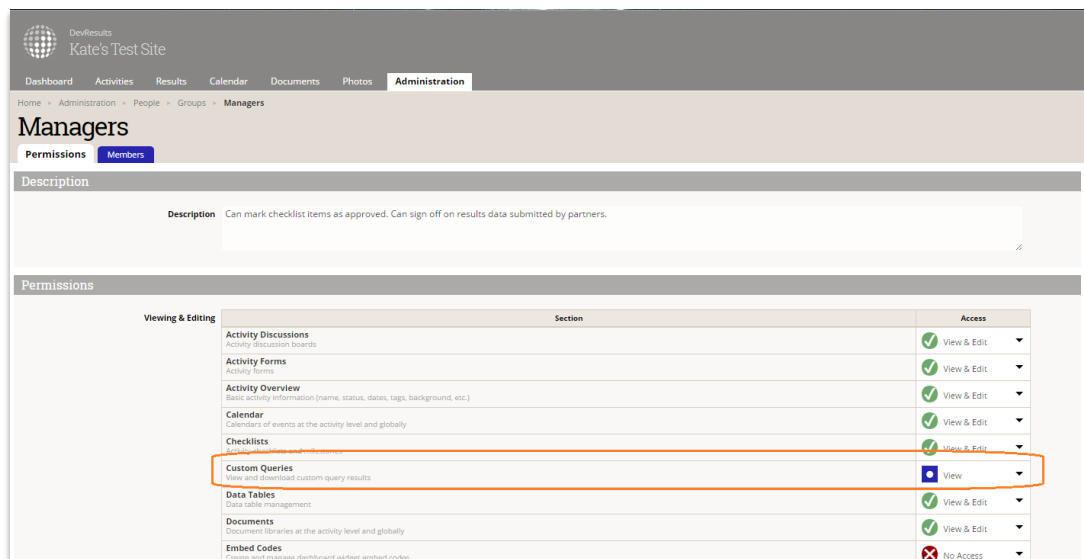
We support two different levels of permissions for all custom queries:

1. All groups with the **View** permissions on the **Custom Queries** role can see all reports (default)
2. Individual reports can be assigned to a subset of the groups with the **Custom Queries** role (advanced)

Default Permissions: Custom Queries Group Role

Access to custom queries is granted at the group level. Any group that needs to access custom queries must have **View** access to the **Custom Queries** role in the group's

permissions page:

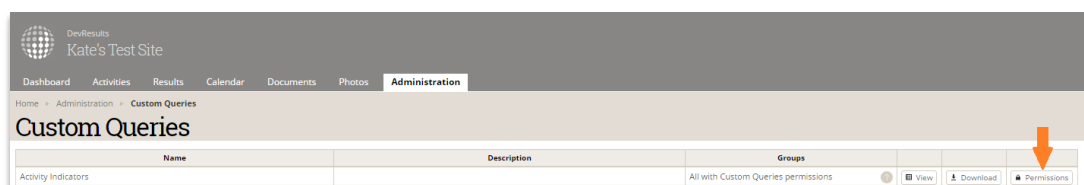


Groups without this permission won't see the **Custom Queries** option in the **Administration** menu. By default, only the **Owners** group is given these permissions, but Owners may assign them to any other group. See [this page](#) for instructions on editing group permissions.

Advanced Permissions: Query Limited to Selected Groups

While most of the time this Custom Queries role is sufficient, you may have different reports that are relevant to different groups. For example, while generally Managers should be able to access custom queries, perhaps the query we've been working with should only be visible to Owners.

Site owners can edit permissions for individual reports using the **Permissions** button on the Custom Queries page:



This will open a pop-up to set permissions (by default, the default setting of All groups with the Custom Queries role is selected):

Permissions

Permissions for **Activity Indicators**

☒ All groups with permissions to Custom Queries
Managers
Owners
☐ Only selected groups (with permissions to Custom Queries)

☒ Done

To limit this to only the Owners group, click on the circle next to **Only selected groups** and then check the box next to the groups we want. (Owners is always selected):

Permissions

Permissions for **Activity Indicators**

☐ All groups with permissions to Custom Queries
☒ Only selected groups (with permissions to Custom Queries)
☐ Managers
☒ Owners

☒ Done

Click **Done** to close the window; the permissions will now be updated for the report.

How Do I Know Whether a Report Uses the Role or Selected Groups?

When you're viewing the Custom Queries page that shows all your queries, all Groups with access to view the query are listed in the "Groups" column. Here's how you can tell the difference as to whether the default or advanced permissions are enabled:

- **Default permissions** (all groups with the Custom Queries role): Groups column will show **All with Custom Queries permissions** and there will be a (?) icon in the right of the cell--hovering over this will show you all groups that have the Custom Queries permission:

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Home Administration Custom Queries

Custom Queries

Name	Description	Groups		
Activity Indicators		All with Custom Queries permissions	(?)	View Download

Need a new report? Email an example excel file to help@devresults.com

- **Advanced permissions** (selected groups with the Custom Queries role): Groups column will only show specific group names and there will be no icon:

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Custom Queries

Name	Description	Groups		
Activity Indicators		Owners	 View	 Download

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