

AssetCloud & InventoryCloud: How to add a filter to a report

Jason Whitmer - 2021-03-15 - in AssetCloud

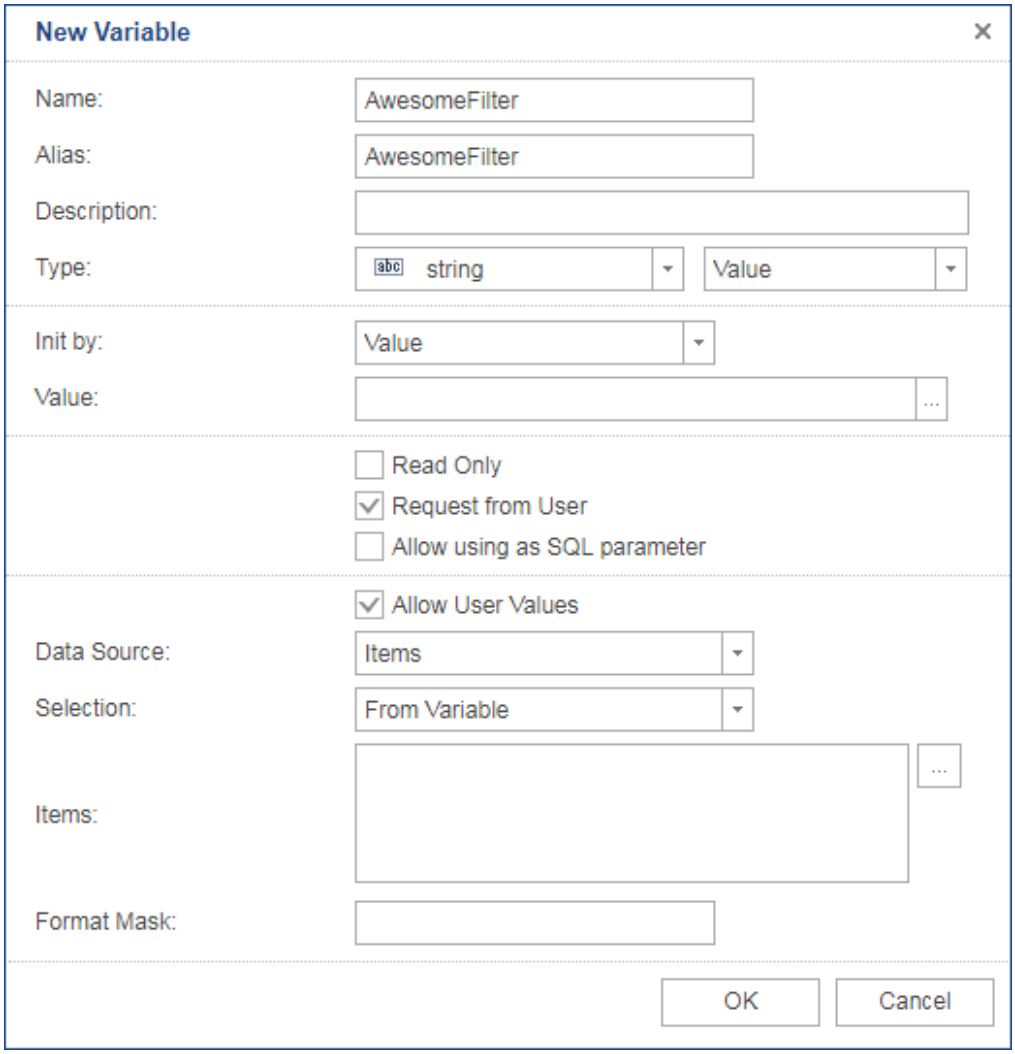
Before running reports, the Report Parameters display the different filters that have been designed into the report.

If you have an Enterprise license for AssetCloud/InventoryCloud (or are using a Demo license), it includes the ability to customize reports using the Design Report button. If you wish to add an additional filter, that can be done in Design:

1. You may wish to first go to File > Save As so you can create a test report to apply your changes until you're sure the changes work as desired. However, if you change one of the default reports and wish to revert those changes, you can also click Reset Report to revert it back to the original design.

2. Select a report and click Design Report. A new browser tab opens. In the Dictionary column on the left, right-click Variables and select New Variable. Enter a Name for the filter, check the box "Request from User", and click OK. Remember the variable name for later use.

   Note that the Name needs to have no spaces, for example AwesomeFilter or Awesome_Filter, and the Alias should automatically update to match the name, but if it doesn't, please manually change it as well.



3. Double-click the text in a blue data band that contains the info you want to filter. For example, Section8; Data Source: SpAssetInfo.
   At the right, click Filters.
   At the upper left, click Add Filter.
   Change the "Field Is" to Expression.
   Click the ... button to the right of the long thin field.

4. Compose the expression:

Expand out: Data Sources, WaspDB2012 [MS SQL], your data source. For example, SpAssetInfo.

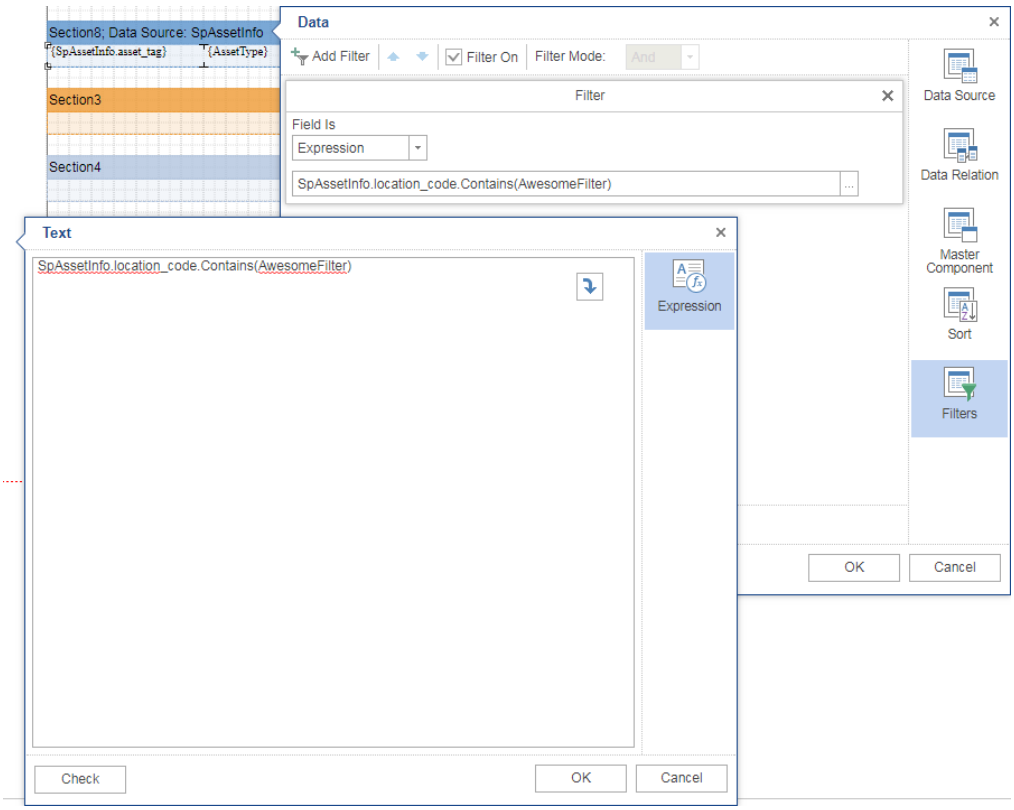


In that list, find the field you want to filter on and double-click it. Its full name will appear in the Text dialog. For example, SpAssetInfo.location_code.

5. Construct the rest of the expression with Boolean operators such as the following, plus your variable name.
   == is equal to. Example: SpAssetInfo.location_code==AwesomeFilter
   != is not equal to. Example: SpAssetInfo.location_code!=AwesomeFilter
   > greater than. Example: SpAssetInfo.location_code>AwesomeFilter
   >= greater than or equal to. Example: SpAssetInfo.location_code>=AwesomeFilter
   < less than. Example: SpAssetInfo.location_code<AwesomeFilter
   <= less than or equal to. Example: SpAssetInfo.location_code<=AwesomeFilter

   Use the Contains function for partial matches. Example: SpAssetInfo.location_code.Contains(AwesomeFilter)

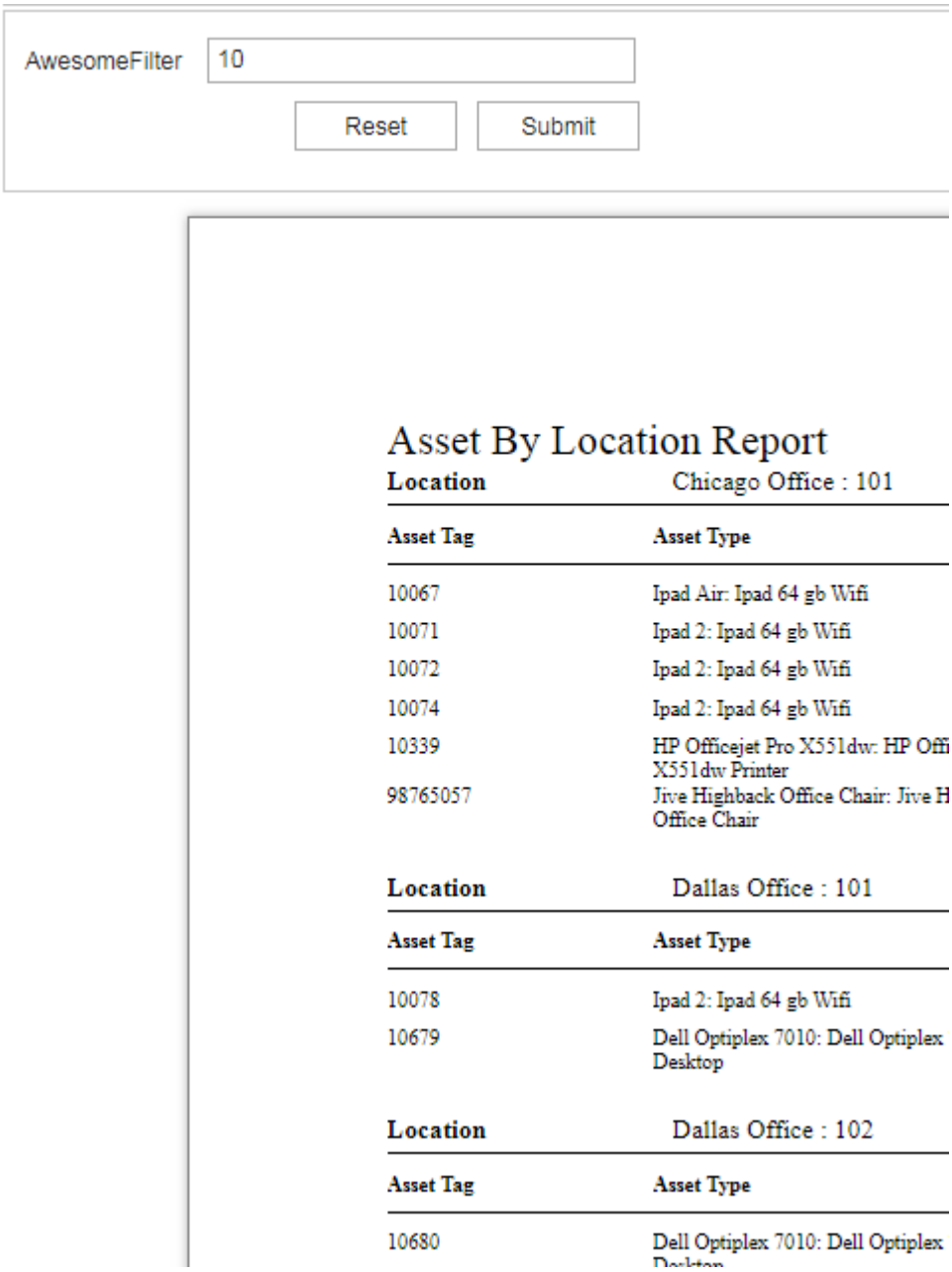
   The Contains option also has the advantage that if the filter field is blank, all report data is shown. The boolean operator options only return data when the filter field matches exactly, and not when it is blank.



6. Click OK twice, then File menu, Save (or Save As).

7. Switch to the browser tab with the Reports list, and click the Run Report button.

8. When the report appears, there is a new section at the upper left with your filter variable name. Enter data for the filter, then click Submit.



Related Pages

- AssetCloud & InventoryCloud Report Customization List
- AssetCloud & InventoryCloud: How to add a sort to a report
- AssetCloud & InventoryCloud: Custom Report FAQ (design, edit)