Adding Dynamic Dates

ACE Reports Video

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INTRODUCTION

Report query filters include options to refine the search parameters associated with it. These parameter options define the constraints of the data search for the data object, and define how user input is entered when the query is run.

The values of date filter objects can be set using a constant value or user prompt value. However, these methods are inefficient for recurring scheduled reports where the date range needs to update for each instance. For these reports, a dynamic date range that automatically adjusts based on the report run date is available.

ADDING DYNAMIC DATES TO A QUERY

1. In **Design Mode** of a report, select the **Edit Data Providers** icon to access the **Query Panel**.

2. In the **Query Filters** panel, in an existing date field, select the **Operator** drop-down menu to adjust filter object parameters, the **Operand**, and **Filter type**.

3. To create a dynamic date filter, in the **Date (Start)** field, select the **Define Filter Type** drop-down menu .

   a. In the list that displays, select the **Object from this query** filter option.

      The **Objects and variables** dialog box displays.

   b. Expand the **Date Objects** class folder.

      Options for a relative date range display, e.g. **Yesterday**, **Today**, **Previous Month Begin** or **End**. These objects, when combined with a **Between** operator, allow for rolling date ranges that will update automatically when a recurring scheduled report runs.

   c. Select the appropriate data object.

   d. Select **OK**.

4. In the **Date (End)** field, select the **Define Filter Type** drop-down menu.

   a. In the list that displays, select the **Object from this query** filter option.

      The **Objects and variables** dialog box displays.

   b. Expand the **Date Objects** class folder.

   c. Select the appropriate data object.

   d. Select **OK**.

      The Date query filter is now based on a dynamic date range that will run a query for data relative to the run date.

5. To save the query with dynamic dates, select the **Close** drop-down menu .

   a. Select **Apply Changes and Close**.

      The **Report page** displays.

   b. Select the **Save** icon to save the report.

   c. Select the **Refresh All** icon to run the report.