

CUSTOM DATES

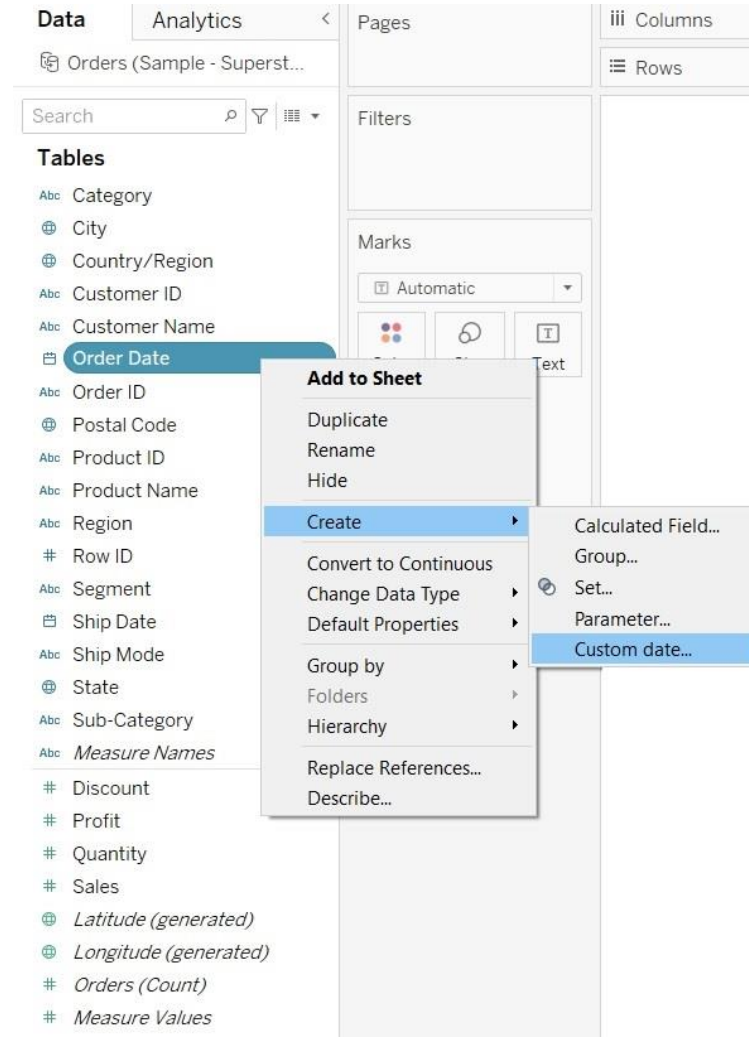
There might be a requirement to create a custom date if we always use a date at a specific level, or if we want to create calculations that rely on a binned or truncated date, or we might need a different sequence of date parts e.g.: Months and then Years.

We may also need to create a special viz like a **Cycle plot** with only Months and Years Date Parts. These Cycle Plots provide the details regarding the **seasonality** and **trend** of data that may not be captured if we use the Dates in the standard chronological order i.e., Years > Quarter > Month etc.

We can create a custom date by working in the Data pane or by using the **DATEPART (Date Parts)** and **DATETRUNC (Date Values)** functions in a calculated field.

STEPS TO CREATE A CUSTOM DATE

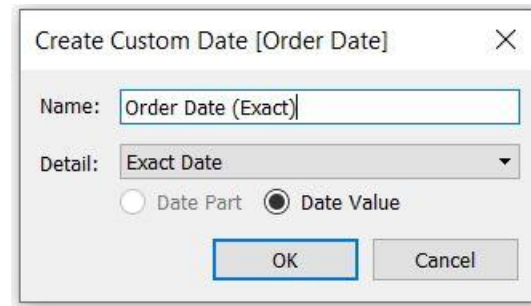
Step 1: Right-click (Control-click on Mac) a date field e.g., **Order Date** in the **Data** pane and select **Create > Create Custom Date**.



STEPS TO CREATE A CUSTOM DATE

Step 2: Create Custom Date [Order Date] will open

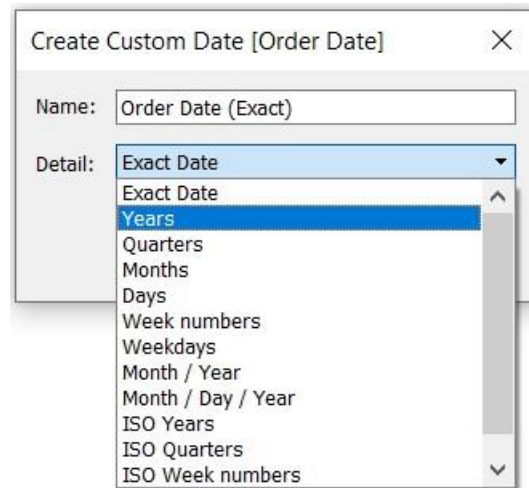
If required change the name of the custom date



The screenshot shows a dialog box titled "Create Custom Date [Order Date]" with a close button (X) in the top right corner. Inside the dialog, there is a "Name:" label followed by a text input field containing "Order Date (Exact)". Below this is a "Detail:" label followed by a dropdown menu currently showing "Exact Date". At the bottom, there are two radio buttons: "Date Part" (which is unselected) and "Date Value" (which is selected). At the very bottom of the dialog are two buttons: "OK" and "Cancel".

STEPS TO CREATE A CUSTOM DATE

Step 3: Select the required component e.g.: **Years**



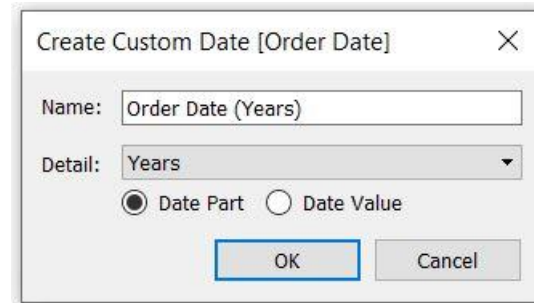
The screenshot shows a dialog box titled "Create Custom Date [Order Date]". The "Name" field contains "Order Date (Exact)". The "Detail" dropdown menu is open, displaying a list of options: "Exact Date", "Exact Date", "Years", "Quarters", "Months", "Days", "Week numbers", "Weekdays", "Month / Year", "Month / Day / Year", "ISO Years", "ISO Quarters", and "ISO Week numbers". The "Years" option is highlighted in blue.



The screenshot shows the same dialog box, but now the "Detail" dropdown menu is closed and "Years" is selected. Below the dropdown, there are two radio buttons: "Date Part" (unselected) and "Date Value" (selected). The "OK" and "Cancel" buttons are visible at the bottom right.

STEPS TO CREATE A CUSTOM DATE

Step 4: Select the Date Part



The screenshot shows a dialog box titled "Create Custom Date [Order Date]" with a close button (X) in the top right corner. Inside the dialog, there is a "Name:" label followed by a text box containing "Order Date (Years)". Below this is a "Detail:" label followed by a dropdown menu currently showing "Years". Under the dropdown, there are two radio buttons: "Date Part" (which is selected) and "Date Value". At the bottom of the dialog are two buttons: "OK" and "Cancel".

STEPS TO CREATE A CUSTOM DATE

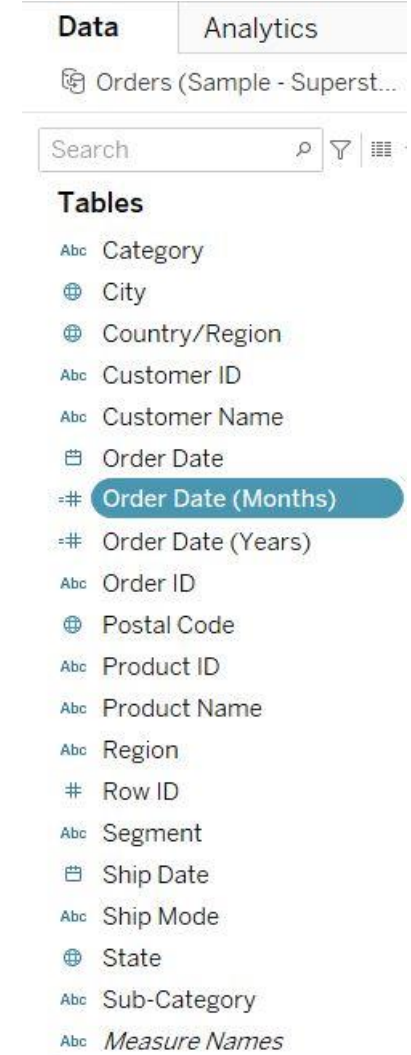
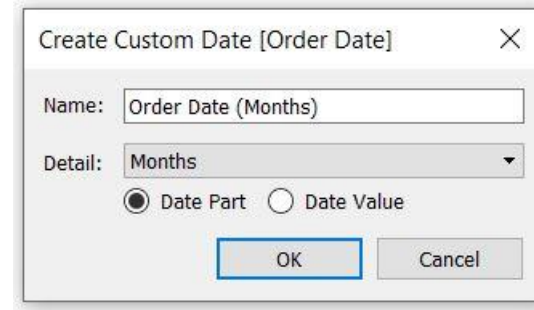
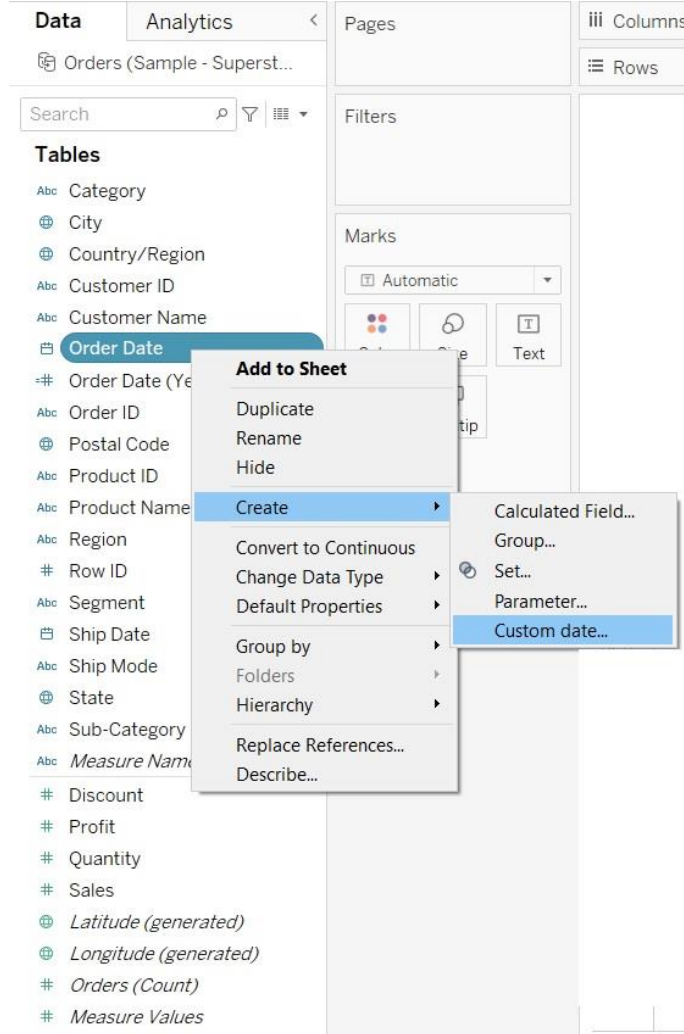
Step 5: The newly created custom date **Order Date(Years)** will now be present in the **Data** pane



NOTE: Step 6 to Step 15 are additional steps for creating another custom date and a date hierarchy

STEPS TO CREATE A CUSTOM DATE

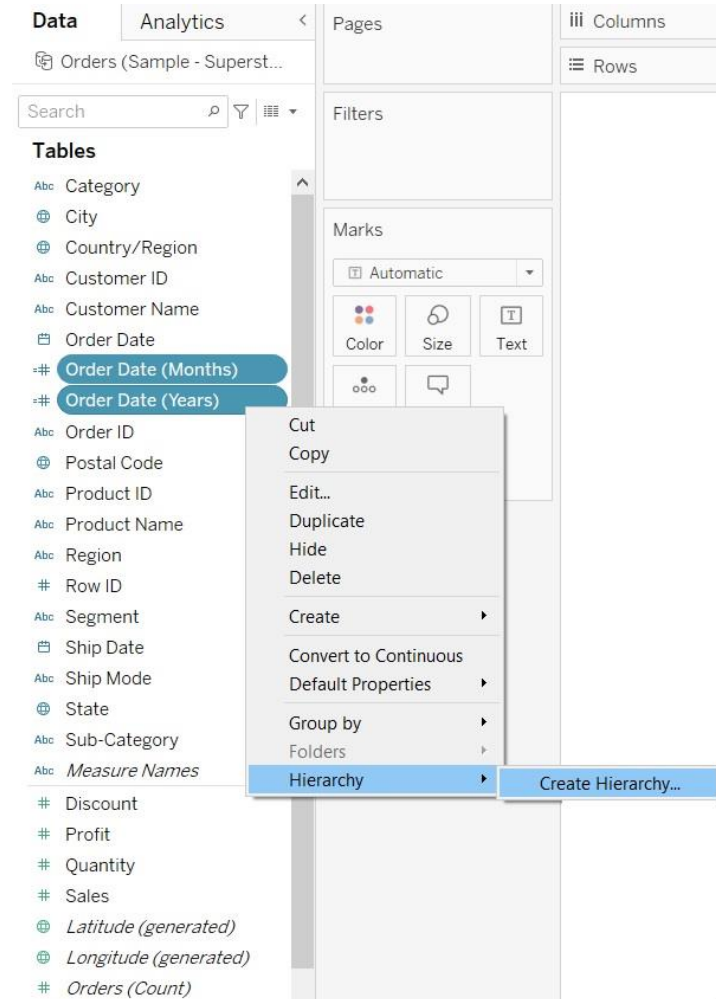
Step 6: Similarly create the custom date for Order Date(Years)



STEPS TO CREATE A CUSTOM DATE

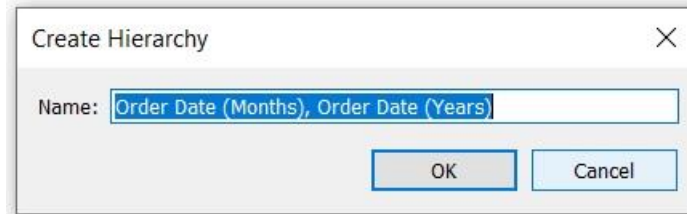
Step 7: Create a new Hierarchy from the custom dates

Select custom date, **Right-click > Hierarchy > Create Hierarchy**



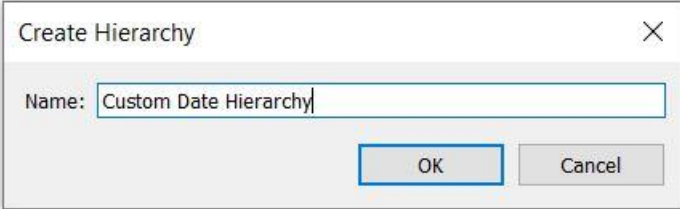
STEPS TO CREATE A CUSTOM DATE

Step 8: Create Hierarchy dialog box will open



STEPS TO CREATE A CUSTOM DATE

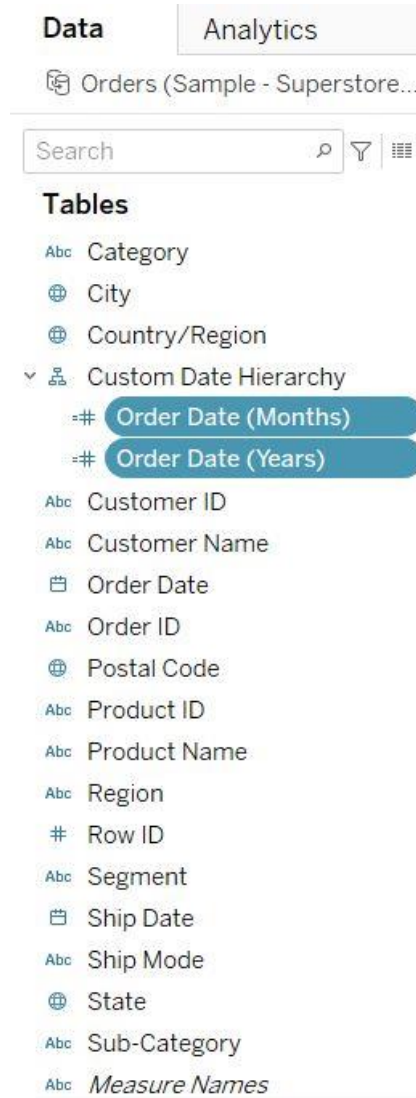
Step 9: Change the name to **Custom Date Hierarchy**
Click **OK**



A screenshot of a 'Create Hierarchy' dialog box. The dialog has a title bar with the text 'Create Hierarchy' and a close button (X) on the right. Below the title bar, there is a label 'Name:' followed by a text input field containing the text 'Custom Date Hierarchy'. At the bottom right of the dialog, there are two buttons: 'OK' and 'Cancel'.

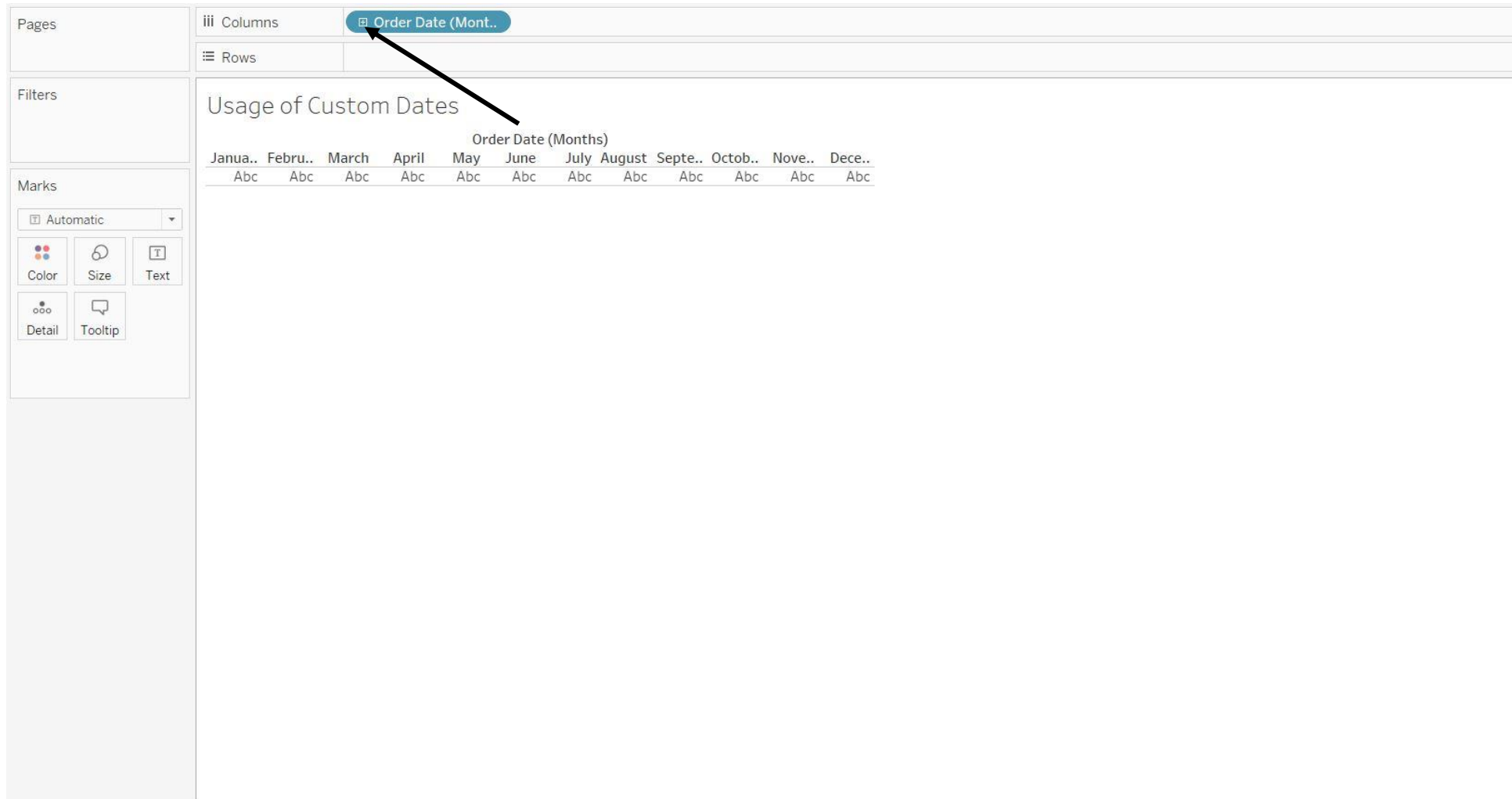
STEPS TO CREATE A CUSTOM DATE

Step 10: Custom Date Hierarchy will now be visible in the **Data pane**



STEPS TO CREATE A CUSTOM DATE

Step 11: Drag the **Custom Date Hierarchy** to the **Columns** shelf
Click on the + icon on the right-side of the blue pill



STEPS TO CREATE A CUSTOM DATE

Step 12: We see both **Order Date(Months)** and **Order Date(Years)** blue pills

Pages

Filters

Marks

Automatic

Color

Size

Text

Detail

Tooltip

Columns

Order Date (Mont..)

Order Date (Years)

Rows

Usage of Custom Dates

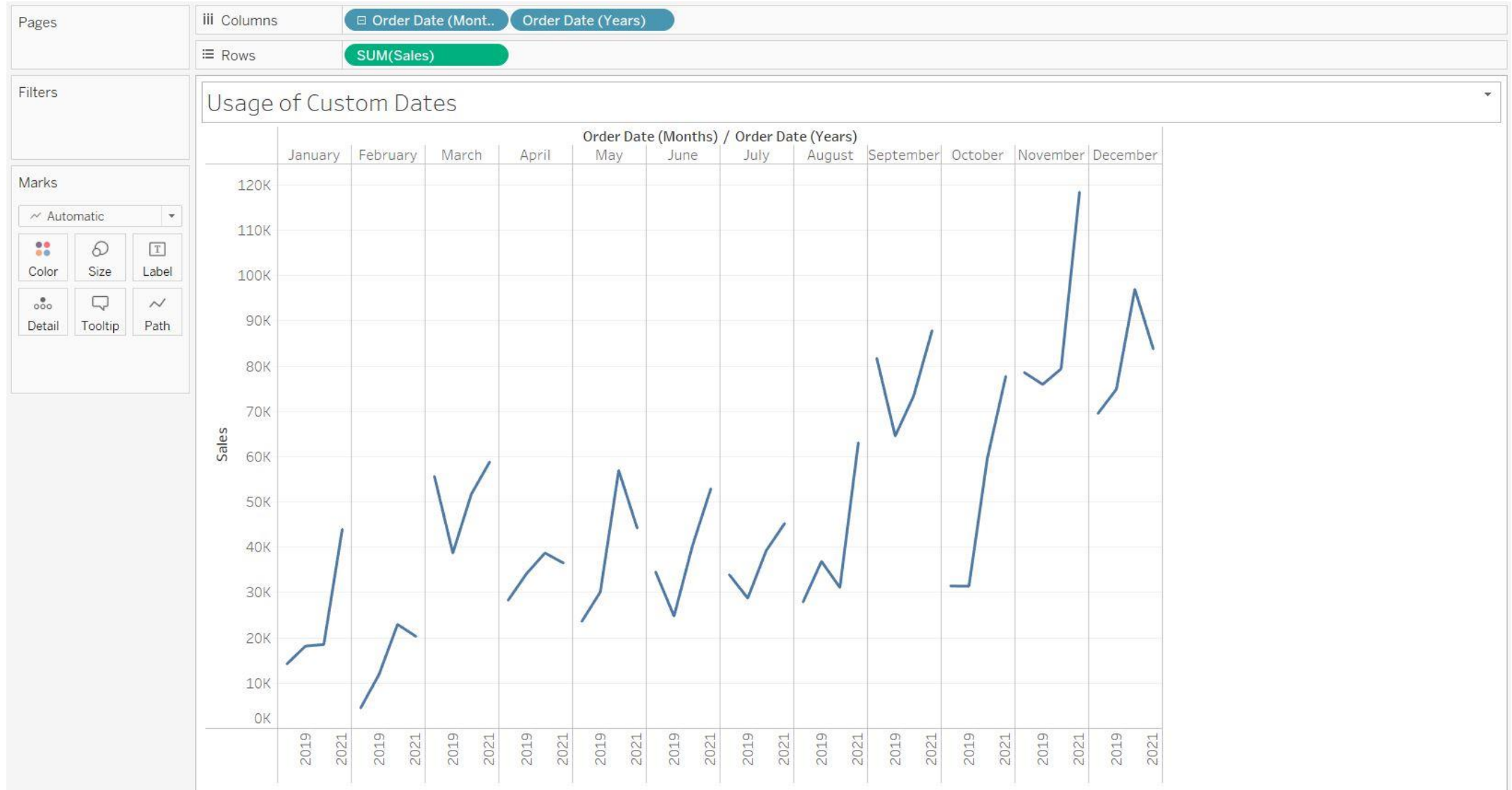
Order Date (Months) / Order Date (Years)																							
January				February				March				April				May				June			
2018	2019	2020	2021	2018	2019	2020	2021	2018	2019	2020	2021	2018	2019	2020	2021	2018	2019	2020	2021	2018	2019	2020	2021
Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc

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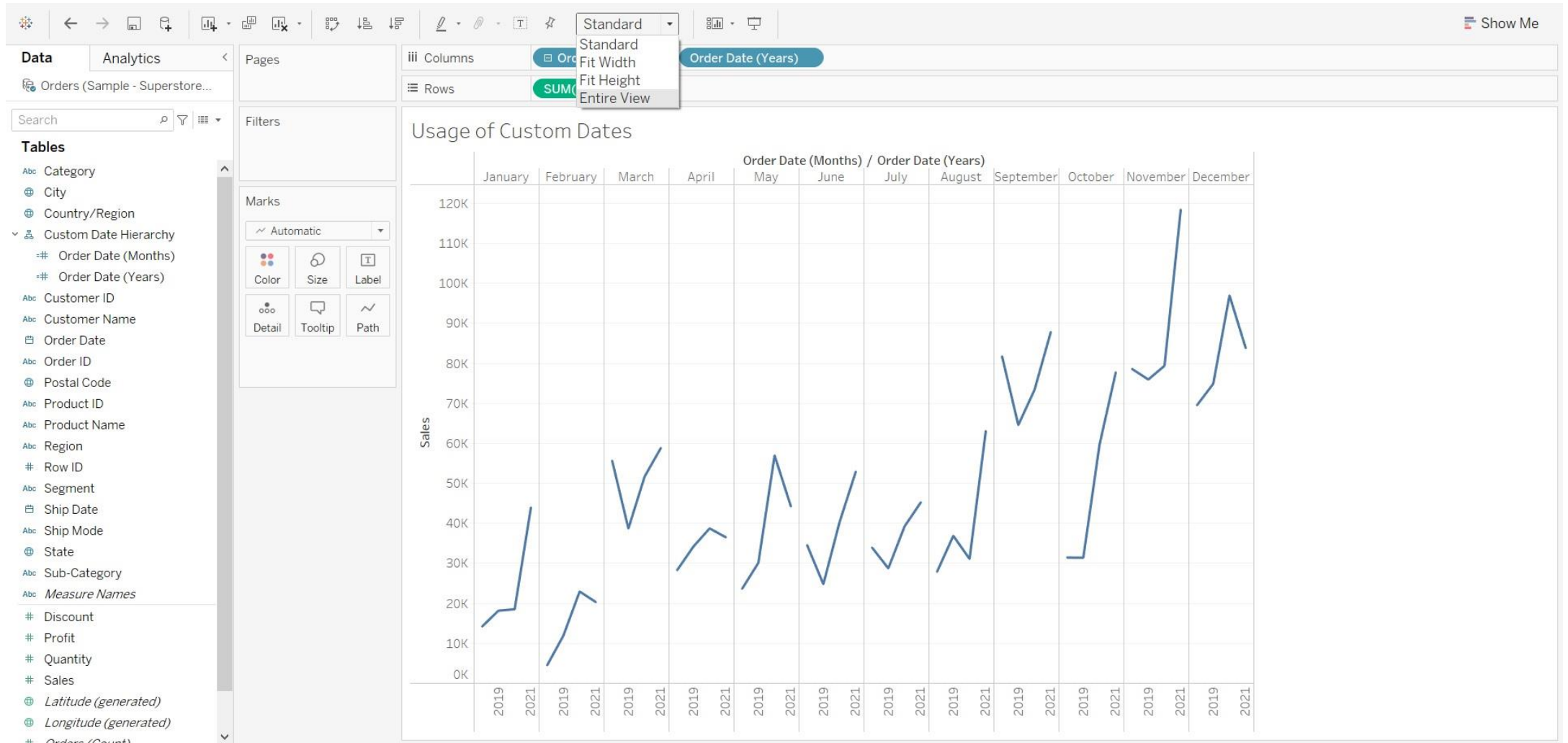
STEPS TO CREATE A CUSTOM DATE

Step 13: Drag **Sales** to the **Rows** shelf



STEPS TO CREATE A CUSTOM DATE

Step 14: Select **Entire View** from the dropdown menu



STEPS TO CREATE A CUSTOM DATE

Step 15: This is the final **Cycle Plot** that can be used to get the insights about **seasonality** and **trend**

