CUSTOM DATES

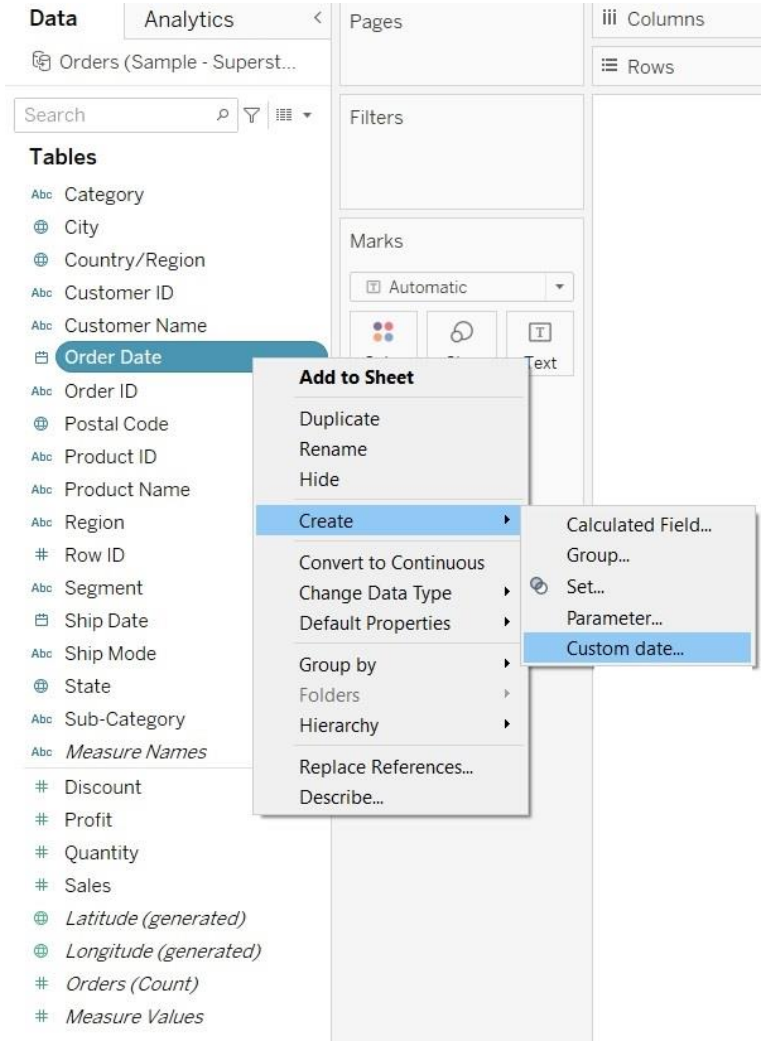
There might be a requirement to create a custom date if we always use a date at a specific level, or if we want to create calculations that rely on a binned or truncated date, or we might need a different sequence of date parts e.g.: Months and then Years.

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

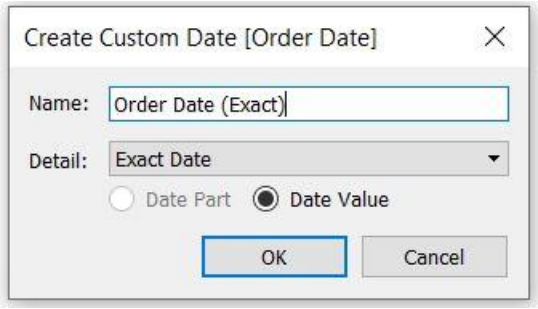
Step 1: Right-click (Control-click on Mac) a date field e.g., **Order Date** in the **Data** pane and select **Create > Create Custom Date.**



STEPS TO CREATE A CUSTOM DATE

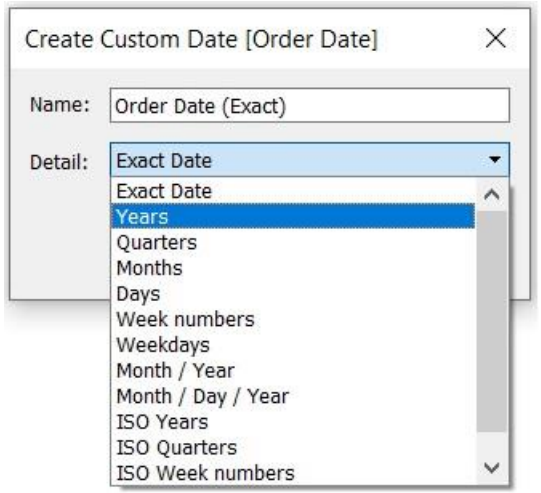
Step 2: Create Custom Date [Order Date] will open

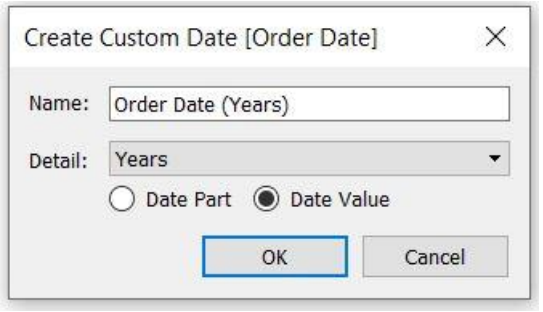
If required change the name of the custom date



STEPS TO CREATE A CUSTOM DATE

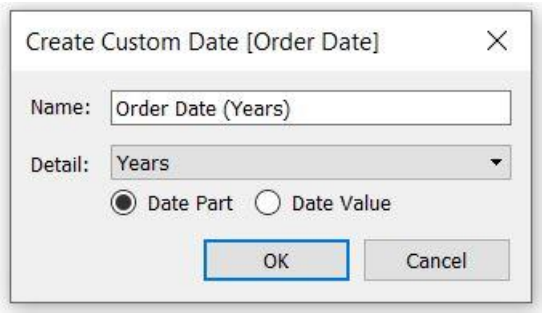
Step 3: Select the required component e.g.: **Years**





STEPS TO CREATE A CUSTOM DATE

Step 4: Select the **Date Part**



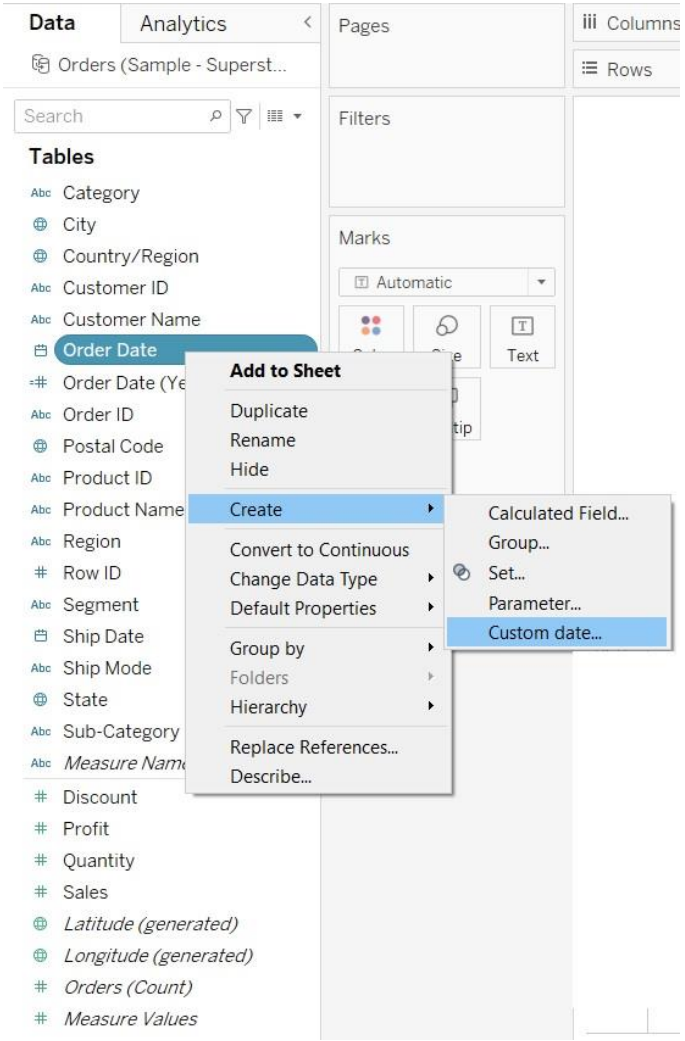
STEPS TO CREATE A CUSTOM DATE

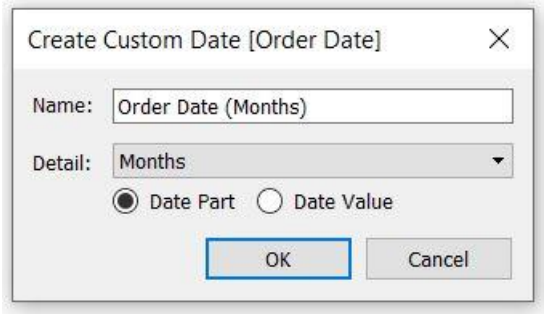
Step 5: The newly created custom date **Order Date(Years)** will now be present in the **Data** pane

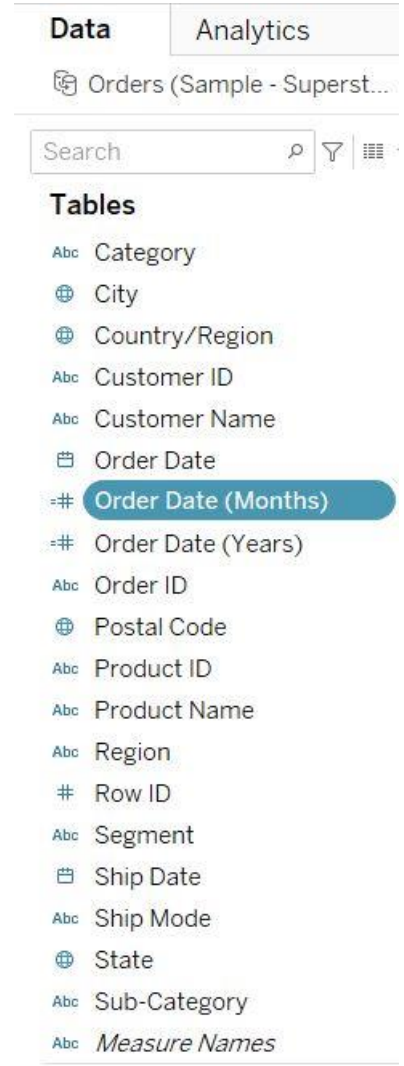
NOTE: Step 6 to **Step 15** are additional steps for creating another custom date and a date hierarchy

STEPS TO CREATE A CUSTOM DATE

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



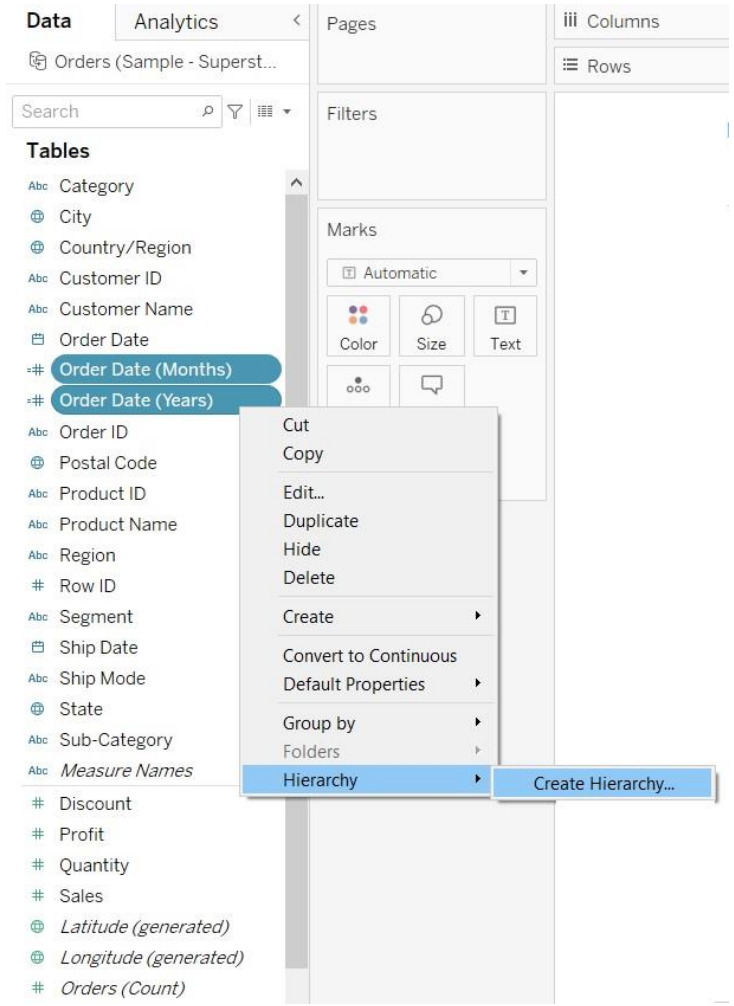




STEPS TO CREATE A CUSTOM DATE

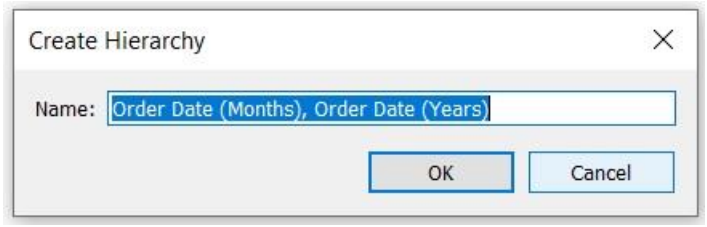
Step 7: Create a new Hierarchy from the custom dates

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



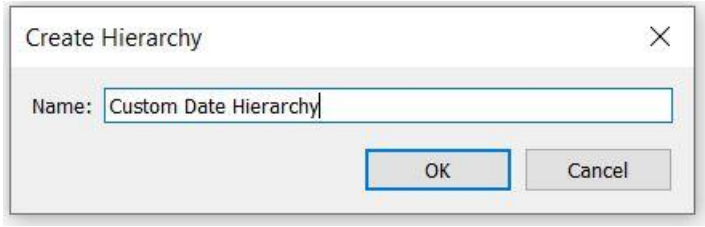
STEPS TO CREATE A CUSTOM DATE

Step 8: Create Hierarchy dialog box will open



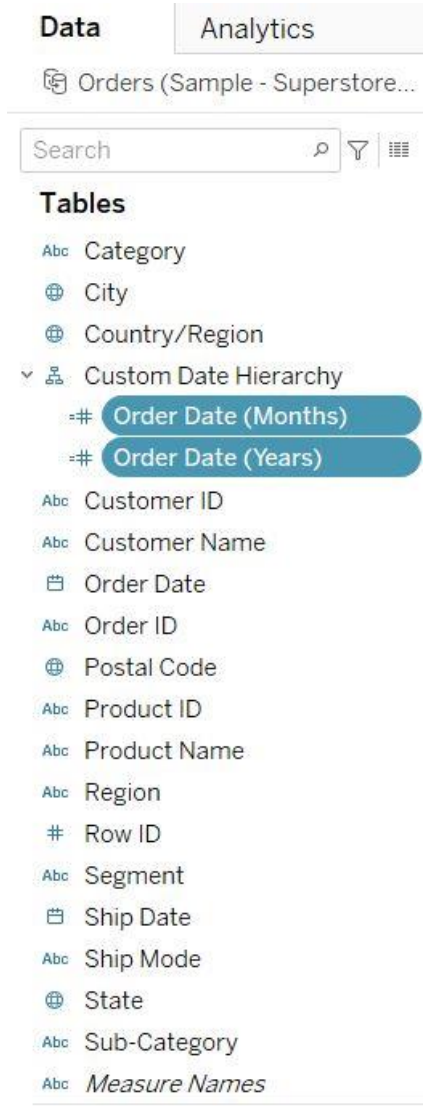
STEPS TO CREATE A CUSTOM DATE

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



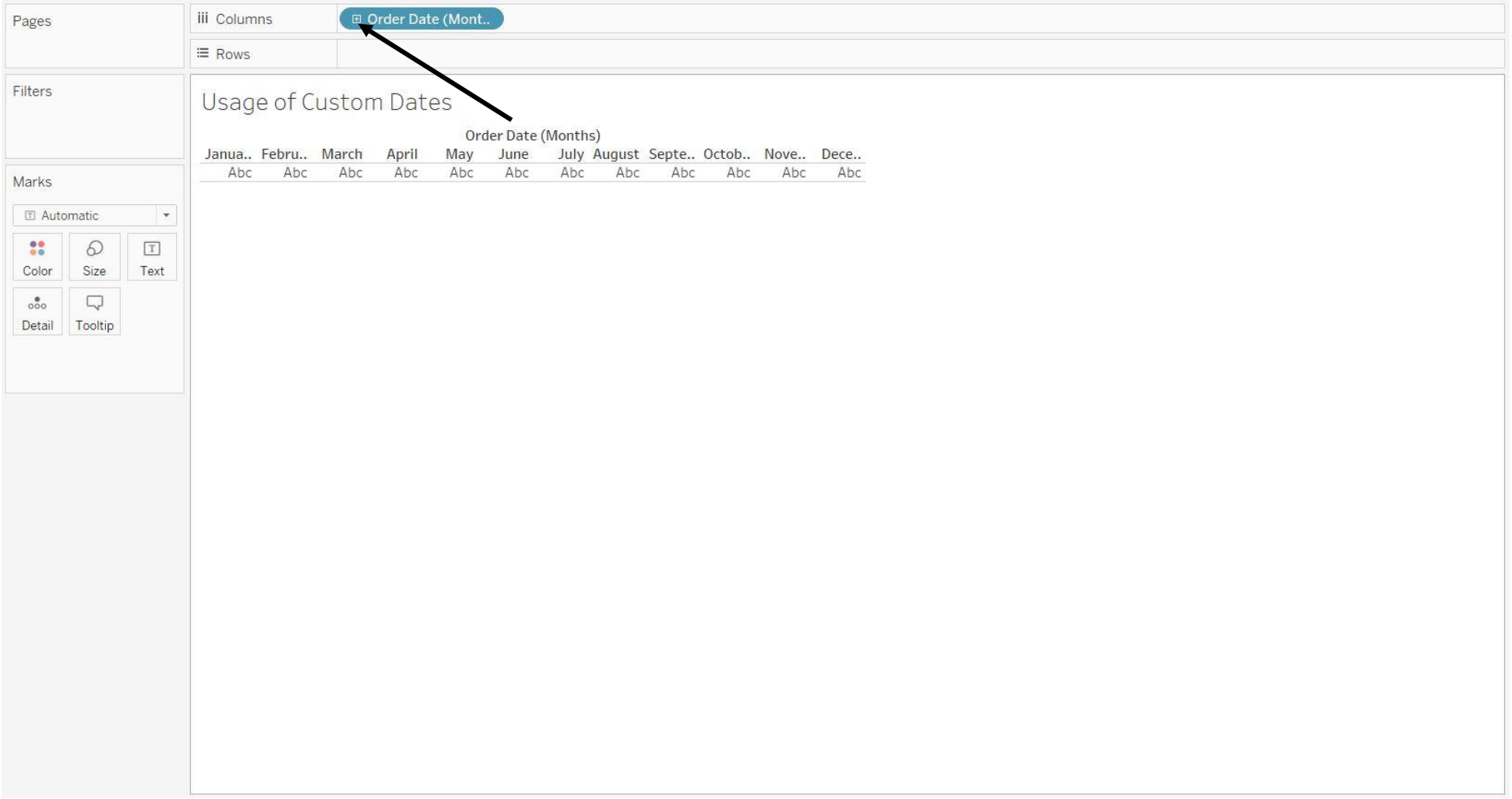
STEPS TO CREATE A CUSTOM DATE

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



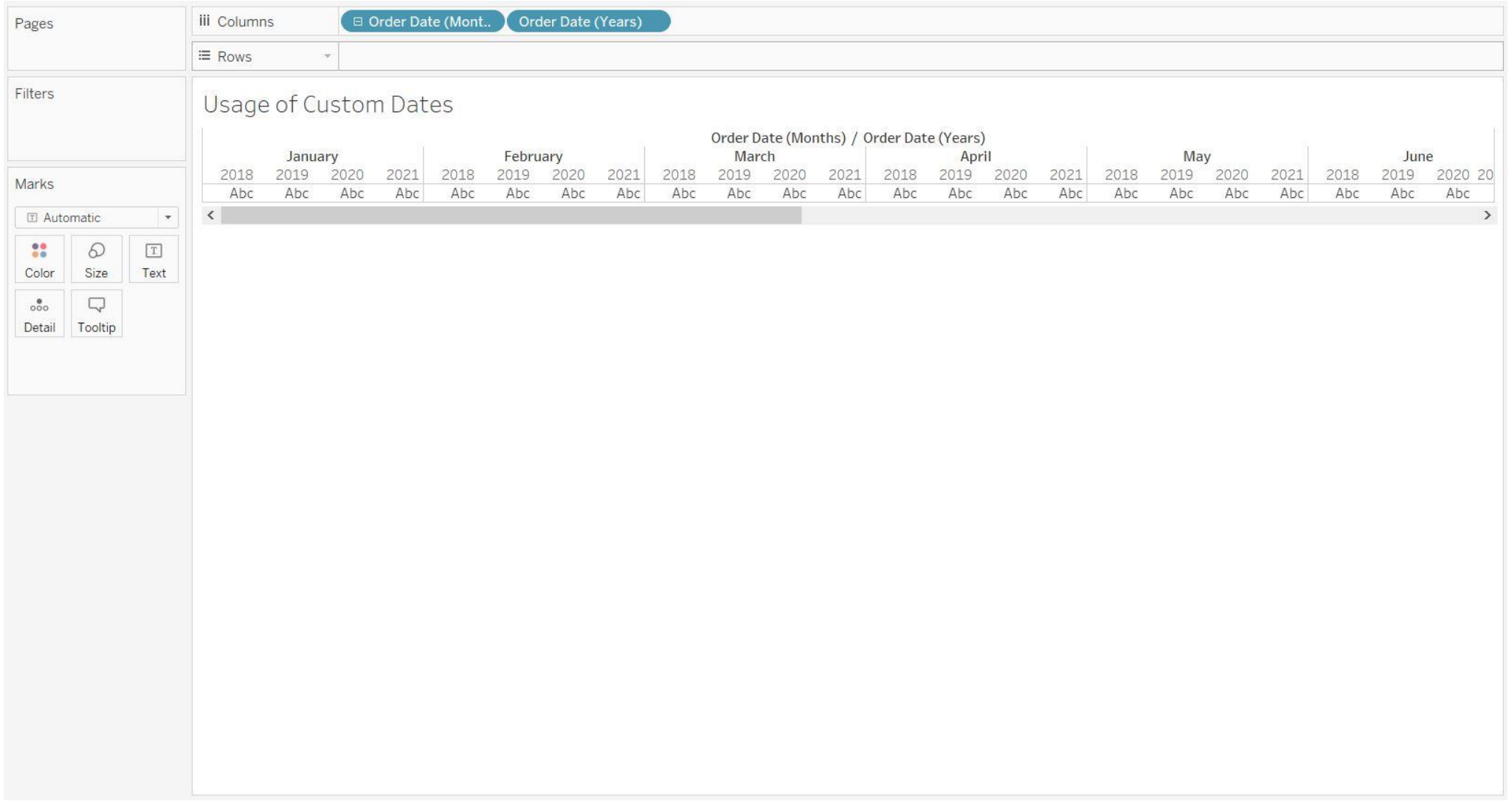
STEPS TO CREATE A CUSTOM DATE

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



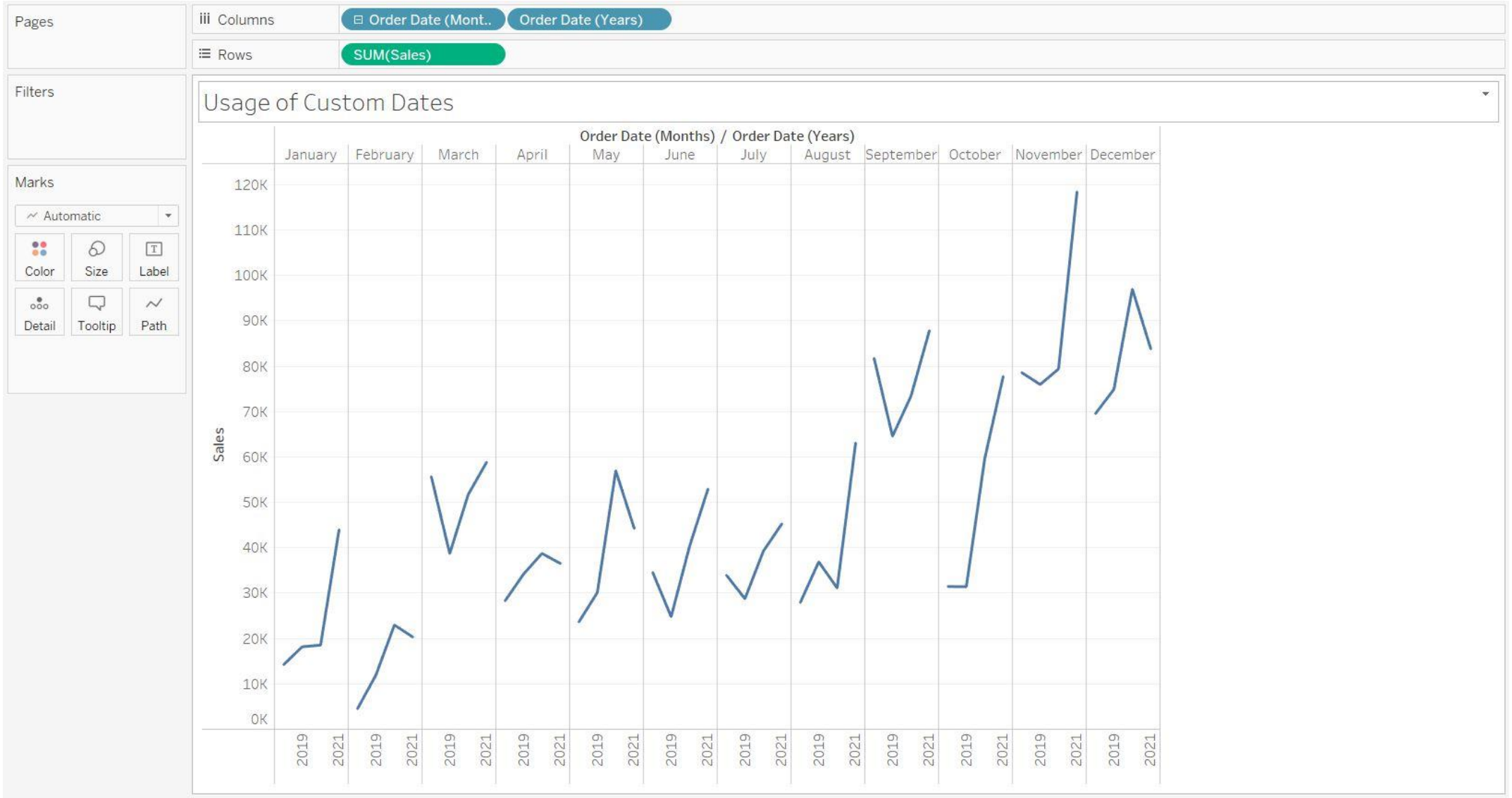
STEPS TO CREATE A CUSTOM DATE

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



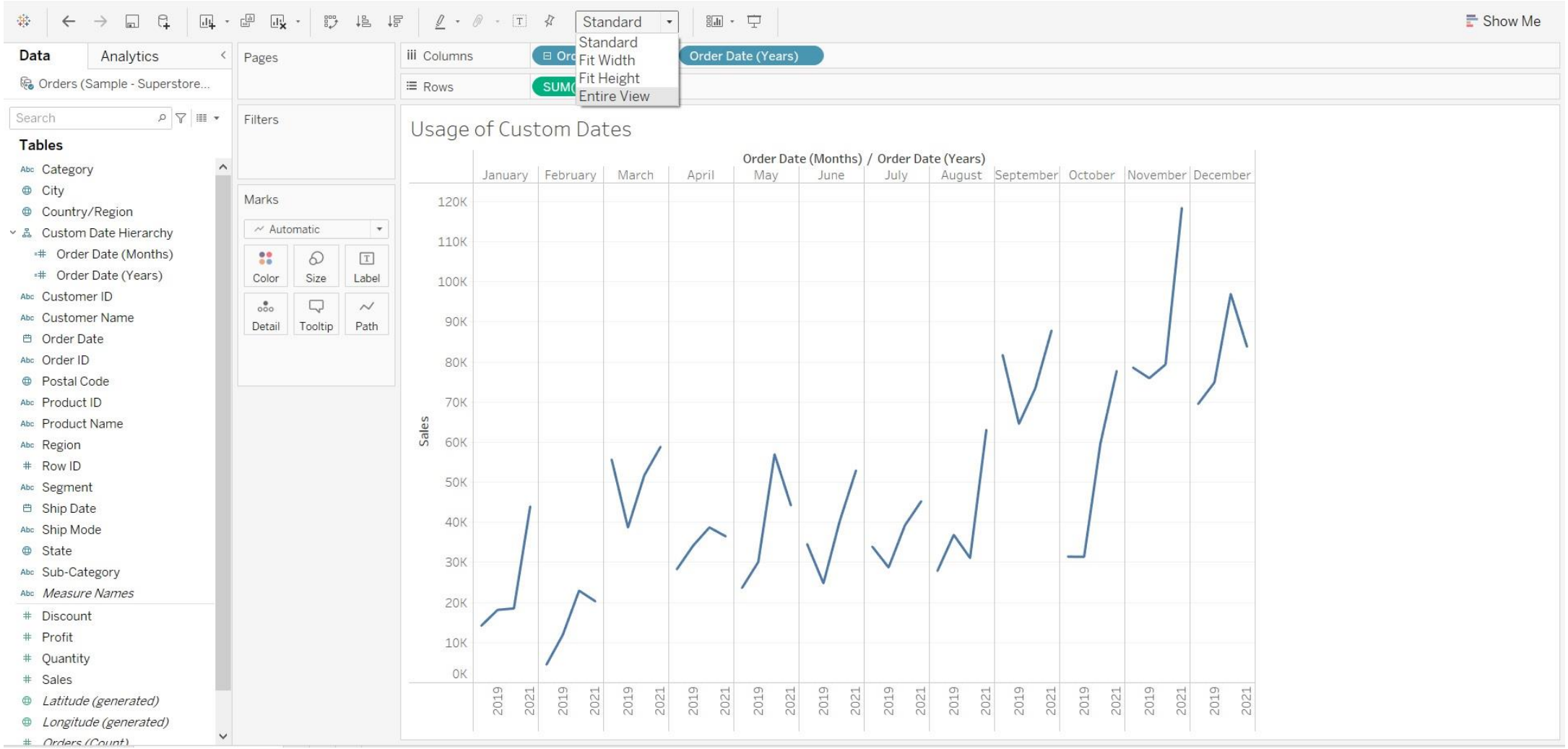
STEPS TO CREATE A CUSTOM DATE

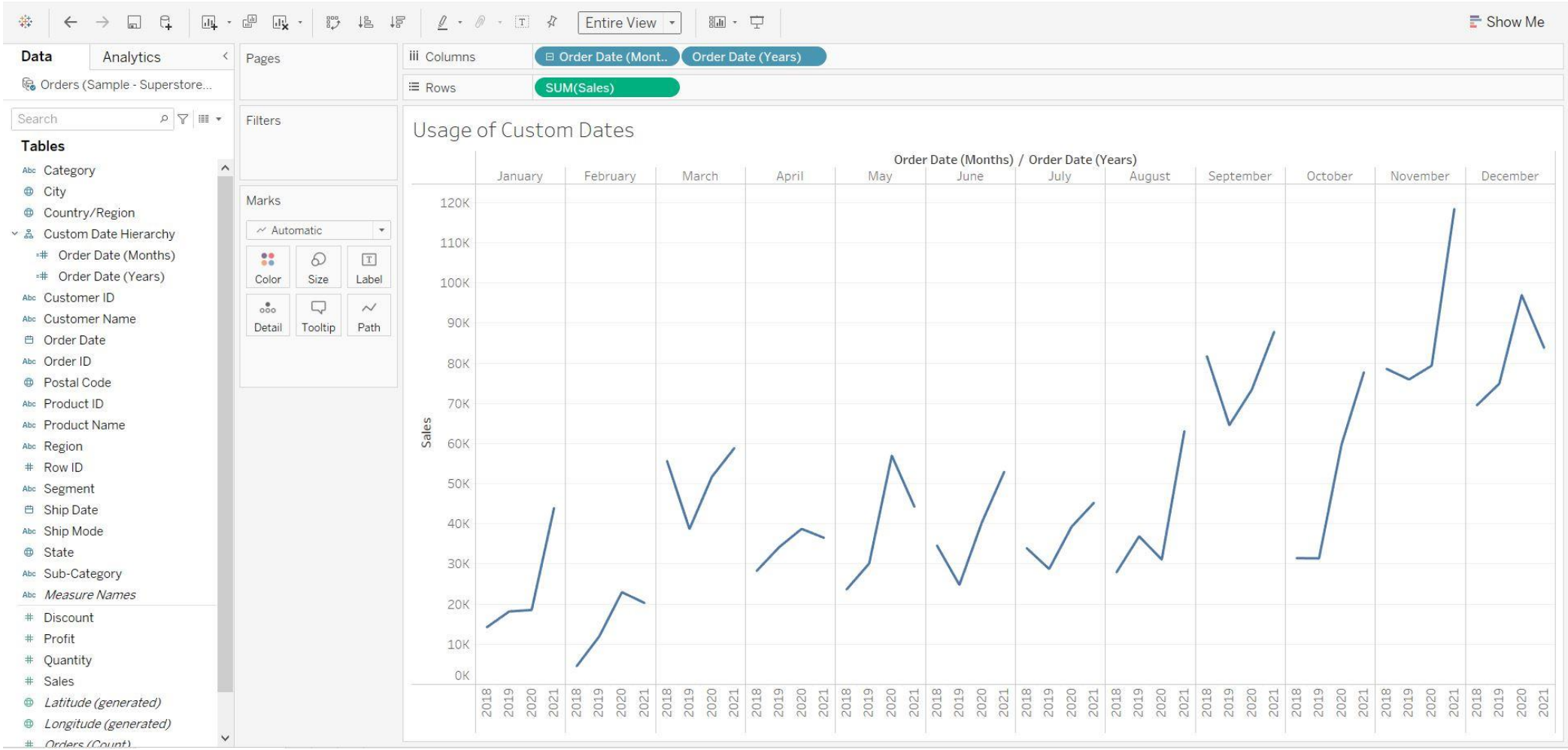
Step 13: Drag **Sales** to the **Rows** shelf



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**