

[Home](#) | [Blog](#)

How to Measure Fiscal Year in Tableau

December 5th, 2017



By [Justin Song](#), Senior BI Analyst

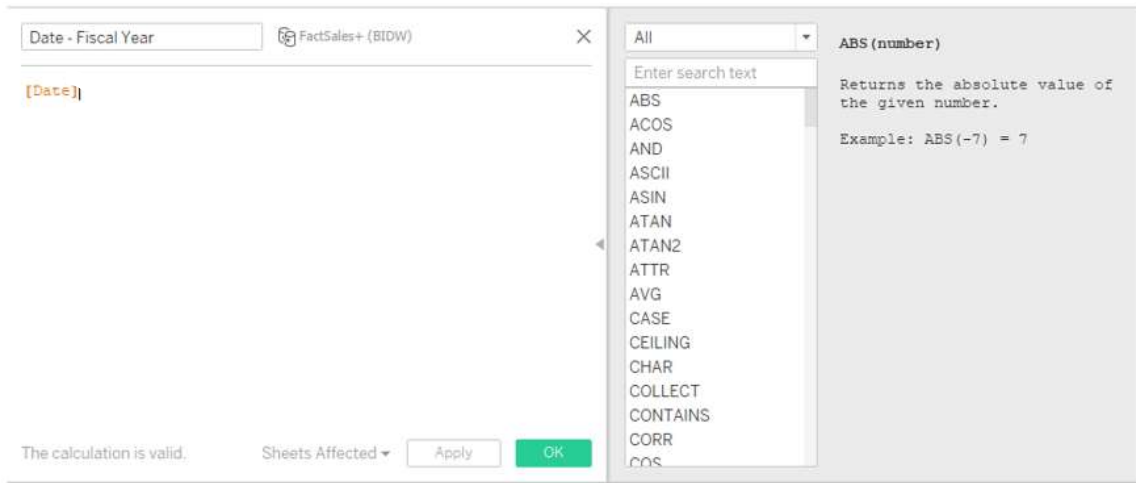
There are a couple of scenarios in the Business Intelligence solution, Tableau, where you may need to create a way to measure the Fiscal Year MTD, QTD, and YTD. An example is laid out below where you can build one chart that will show you MTD, QTD, YTD in the Fiscal Year, as of today.

1. Create a date for Fiscal Year

Suggested Articles:

[What You Need to Know About Nexus \(and Why it Matters for Small Businesses\)](#)

[Q & A with Encore | Disaster Recovery Planning \(Video\)](#)



Recovery Planning (Video)

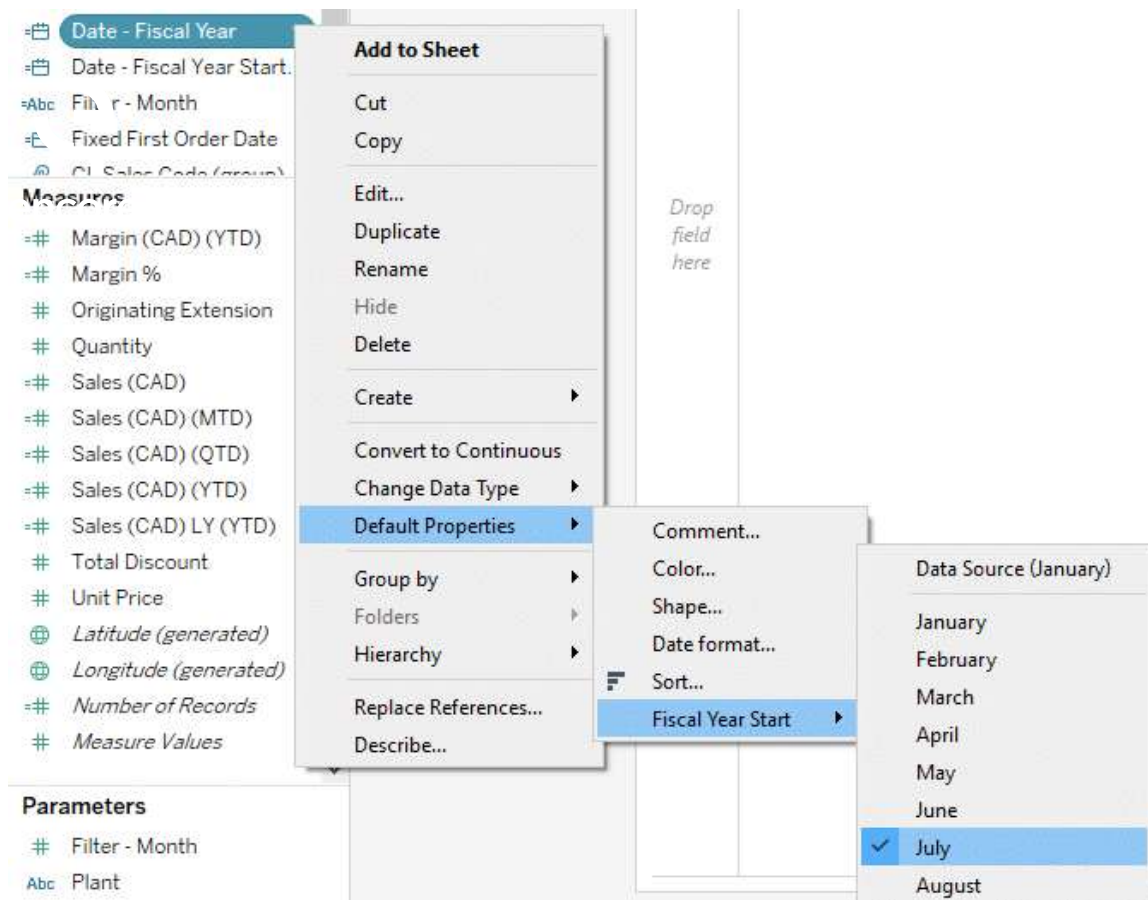
The Goal of AI and its Impact on FP&A

2. Change Fiscal Year Start month

Suggested Articles:

What You Need to Know About Nexus (and Why it Matters for Small Businesses)

Q & A with Encore | Disaster Recovery Planning (Video)



Recovery Planning (Video)

The Goal of AI and its Impact on FP&A

3. Create Date – Fiscal Year Start Date

Suggested Articles:

What You Need to Know About Nexus (and Why it Matters for Small Businesses)

Q & A with Encore | Disaster Recovery Planning (Video)

Date - Fiscal Year Start Date

FactTableFinanceMonthlyCube



```
IF (MONTH(Today()-1) >= MONTH(#July 1, 1000#)
AND
MONTH(Today()-1) <= MONTH(#December 31, 1000#))

THEN DATE("07/01/"+DATENAME('year',Today()-1))

ELSEIF
(MONTH(Today()-1) >= MONTH(#January 1, 1000#)
AND
MONTH(Today()-1) <= MONTH(#June 30, 1000#))

THEN DATE("07/01/"+DATENAME('year',DATEADD('month',-12,Today()-1)))

END
```

Recovery Planning (Video)

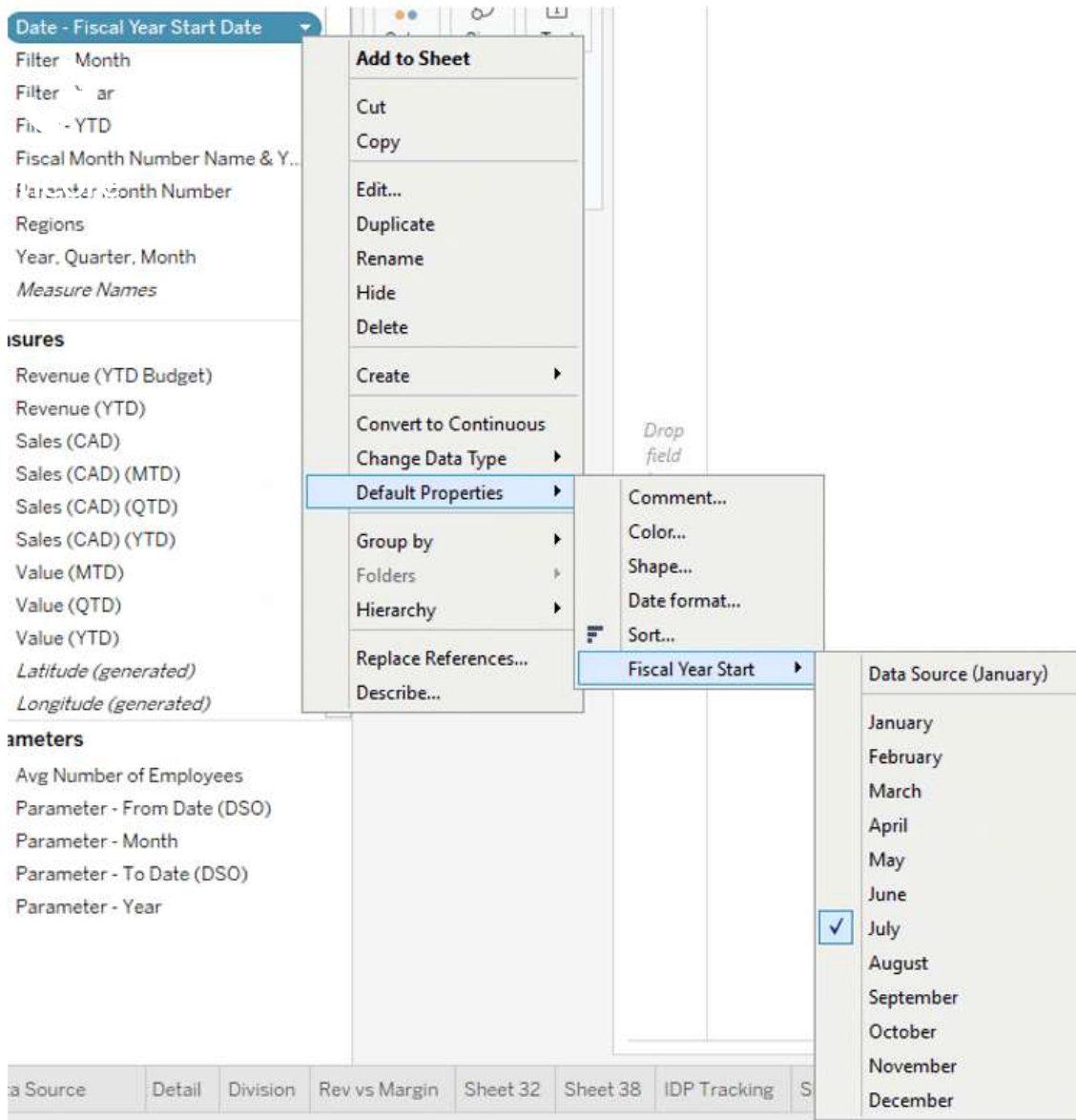
The Goal of AI and its Impact
on FP&A

4. Change its Fiscal Year Start

Suggested Articles:

What You Need to Know About
Nexus (and Why it Matters for
Small Businesses)

Q & A with Encore | Disaster
Recovery Planning (Video)



Recovery Planning (Video)

The Goal of AI and its Impact on FP&A

5. Create a Sales (MTD) with formula below

Suggested Articles:

What You Need to Know About Nexus (and Why it Matters for Small Businesses)

Q & A with Encore | Disaster Recovery Planning (Video)

Sales (CAD) (MTD)

FactSales+ (BIDW)

<

>

DATEDIFF('month',[Date - Fiscal Year],Today()-1) <> 0 THEN NULL

ELSEIF

[Date - Fiscal Year] > (Today()-1) THEN Null

IF

[Sales (CAD)]

END

|

The calculation is valid.

Sheets Affected ▾

Apply

OK

6. Create Sales (QTD)

Recovery Planning (Video)

The Goal of AI and its Impact on FP&A

Suggested Articles:

What You Need to Know About Nexus (and Why it Matters for Small Businesses)

Q & A with Encore | Disaster Recovery Planning (Video)



IF [Date – Fiscal Year] < [Date – Fiscal Year Start Date] THEN
Null
ELSEIF [Date – Fiscal Year] > (Today()-1) THEN
Null
ELSEIF (DATENAME('month',Today()-1) = 'July' OR
DATENAME('month',Today()-1) = 'August' OR
DATENAME('month',Today()-1) = 'September' THEN
IF DATENAME('month',[Date – Fiscal Year])= 'July' THEN
[Sales (CAD)]
ELSEIF DATENAME('month',[Date – Fiscal Year])= 'August' THEN
[Sales (CAD)]
ELSEIF DATENAME('month',[Date – Fiscal Year])= 'September' THEN
[Sales (CAD)]
ELSE
NULL
END
ELSEIF DATENAME('month',Today()-1) = 'October' OR
DATENAME('month',Today()-1) = 'November' OR
DATENAME('month',Today()-1) = 'December' THEN
IF DATENAME('month',[Date – Fiscal Year])= 'October' THEN
[Sales (CAD)]
ELSEIF DATENAME('month',[Date – Fiscal Year])= 'November' THEN
[Sales (CAD)]
ELSEIF DATENAME('month',[Date – Fiscal Year])= 'December' THEN
[Sales (CAD)]
ELSE
NULL
END
ELSEIF DATENAME('month',Today()-1) = 'January' OR
DATENAME('month',Today()-1) = 'February' OR
DATENAME('month',Today()-1) = 'March' THEN
IF DATENAME('month',[Date – Fiscal Year])= 'January' THEN
[Sales (CAD)]
ELSE
NULL
END

Recovery Planning (Video)

The Goal of AI and its Impact
on FP&A

Suggested Articles:

What You Need to Know About
Nexus (and Why it Matters for
Small Businesses)

Q & A with Encore | Disaster
Recovery Planning (Video)

```

[Sales (CAD)]
ELSEF
NULL
END
ELSEIF DATENAME('month',Today()-1) = 'October' OR
DATENAME('month',Today()-1) = 'November' OR
DATENAME('month',Today()-1) = 'December' THEN
IF DATENAME('month',[Date – Fiscal Year])= 'October' THEN
[Sales (CAD)]
ELSEIF DATENAME('month',[Date – Fiscal Year])= 'November' THEN
[Sales (CAD)]
ELSEIF DATENAME('month',[Date – Fiscal Year])= 'December' THEN
[Sales (CAD)]
ELSE
NULL
END
ELSEIF DATENAME('month',Today()-1) = 'January' OR
DATENAME('month',Today()-1) = 'February' OR
DATENAME('month',Today()-1) = 'March' THEN
IF DATENAME('month',[Date – Fiscal Year])= 'January' THEN
[Sales (CAD)]
ELSEIF DATENAME('month',[Date – Fiscal Year])= 'February' THEN
[Sales (CAD)]
ELSEIF DATENAME('month',[Date – Fiscal Year])= 'March' THEN
[Sales (CAD)]
ELSE
NULL
END
ELSEIF DATENAME('month',Today()-1) = 'April' OR
DATENAME('month',Today()-1) = 'May' OR
DATENAME('month',Today()-1) = 'June' THEN
IF DATENAME('month',[Date – Fiscal Year])= 'April' THEN
[Sales (CAD)]

```

Recovery Planning (RPO)

The Goal of AI and its Impact on FP&A

Suggested Articles:

What You Need to Know About Nexus (and Why it Matters for Small Businesses)

Q & A with Encore | Disaster Recovery Planning (Video)


```

ELSEIF DATENAME('month',[Date - Fiscal Year])='May' THEN
[Sales (CAD)]
ELSEIF DATENAME('month',[Date - Fiscal Year])='June' THEN
[Sales (CAD)]
ELSE
NULL
END
ELSE
NULL
END

```

7. Create Sales (YTD)



Recovery Planning (Video)

The Goal of AI and its Impact on FP&A

Suggested Articles:

What You Need to Know About Nexus (and Why it Matters for Small Businesses)

Q & A with Encore | Disaster Recovery Planning (Video)

I hope these steps were helpful in creating a way to measure the Fiscal Year MTD, QTD, and YTD in Tableau. If you have any questions about Tableau or other Business Intelligence solutions, please feel free to [contact us](#).

Recovery Planning (RPO),

The Goal of AI and its Impact on FP&A

Categorized In: [Uncategorized](#)

Share: [!\[\]\(0f848bbd71cef6b345273b16f905912a_img.jpg\)](#) [!\[\]\(d873c0073cfd3b74a7c9b5ca09bad0c7_img.jpg\)](#) [!\[\]\(9126fbb278b6412ee8b215b5e71dadba_img.jpg\)](#) [!\[\]\(bb3ac0ef9759920456d29214b9245205_img.jpg\)](#)

Author



Justin Song

Justin is a highly qualified Senior Business Intelligence and Data Analyst who holds numerous professional certifications in accounting, business intelligence, project management, data, development and a wide range of technologies.

[More from Justin Song](#)

Related Articles

By **The Encore Team**

March 10, 2020

Push the Button: The Costs of Delaying Digital Transformation in Finance

By **Insightsoftware**

December 9, 2019

How to Close the Knowledge Gaps on Your Finance Team

This article was originally posted by insightsoftware. You can read the original article here: [How to Close the Knowledge Gaps on Your Finance Team](#). The most urgent obstacle facing many finance teams comes from an unexpected source: talent. Expectations around finance are changing fast, prioritizing new skills like data analytics over strict accounting acumen. At...



Specialist
Small and Midsize Business
Management

888.898.4330

encore@encorebusiness.com

Encore Business Solutions Inc. is a Microsoft Dynamics Partner that provides software and services to clients throughout North America.

Microsoft product images reprinted with permission from Microsoft Corporation.

[Company](#)

[About Us](#)

[Leadership](#)

[Careers](#)

Events

Locations

Winnipeg, MB

Calgary, AB

Seattle, WA

North America

Get in Touch



Contact

Support

Subscribe

2025 © Encore Business Solutions [Privacy Policy](#)

Suggested Articles:

-  What You Need to Know About Nexus (and Why it Matters for Small Businesses)
-  Q & A with Encore | Disaster Recovery Planning (Video)