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# How to Measure Fiscal Year in Tableau

December 5th, 2017



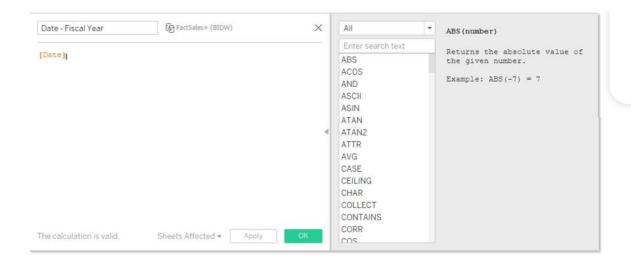
By Justin Song, Senior BI Analyst

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:

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2. Change Fiscal Year Start month

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■ Date - Fiscal Year Add to Sheet Date - Fiscal Year Start. =Abc Filt r - Month Cut Fixed First Order Date Copy CI Salar Cada (araun) Edit... Massures Drop Duplicate Margin (CAD) (YTD) field here Rename Margin % Hide Originating Extension Delete Quantity Sales (CAD) Create Sales (CAD) (MTD) Convert to Continuous Sales (CAD) (QTD) Sales (CAD) (YTD) Change Data Type Sales (CAD) LY (YTD) **Default Properties** Comment... Total Discount Data Source (January) Color... Group by Unit Price Shape... Folders January Latitude (generated) Date format... Hierarchy February Longitude (generated) Sort... March Number of Records Replace References... Fiscal Year Start April Measure Values Describe... May **Parameters** June # Filter - Month July

August

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3. Create Date - Fiscal Year Start Date

Abc Plant

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```
Date - Fiscal Year Start Date

FactTableFinanceMonthlyCube

TF ....NTH (Today()-1) >= MONTH (#July 1, 1000#)

An..

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
```

4. Change its Fiscal Year Start

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Date - Fiscal Year Start Date Add to Sheet Filter Month Filter ' ar Cut Fb. - YTD Сору Fiscal Month Number Name & Y., Edit... Parantar Sonth Number Regions Duplicate Year, Quarter, Month Rename Measure Names Hide Delete sures Revenue (YTD Budget) Create Revenue (YTD) Convert to Continuous Drop Sales (CAD) field Change Data Type Sales (CAD) (MTD) **Default Properties** Comment... Sales (CAD) (QTD) Color... Sales (CAD) (YTD) Group by Shape... Value (MTD) Folders Date format... Value (QTD) Hierarchy F Value (YTD) Sort... Replace References... Fiscal Year Start Latitude (generated) Data Source (January) Describe... Longitude (generated) January ameters February Avg Number of Employees March Parameter - From Date (DSO) April Parameter - Month May Parameter - To Date (DSO) June Parameter - Year July August September October November Detail Division Rev vs Margin Sheet 32 Sheet 38 IDP Tracking S a Source December

5. Create a Sales (MTD) with formula below

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Sales (CAD) (MTD)

PactSales + (BIDW)

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

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

END

The calculation is valid.

Sheets Affected 
Apply

OK

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#### 6. Create Sales (QTD)

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FactSales+ (BIDW) Sales (CAD) (QTD) × TF [ e - Fiscal Year] < [Date - Fiscal Year Start Date] THEN 1 11 ELSEIF [Date - Fiscal Year] > (Today()-1) THEN Nu11 £16£17 (2.TENAME ('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)) The calculation is valid. Sheets Affected \* Apply

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IF [Date - Fiscal Year] < [Date - Fiscal Year Start Date] THENNullELSEIF [Date - Fiscal Year] > (Today()-1) THENNull

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

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**ELSF** NULL **END** ELSE!! 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)]

[Sales (CAD)]

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```
ELSEIF DATENAME('month',[Date - Fiscal Year])= 'May' THEN
[Sales (CAD)]

ELSE
[Sales (CAD)]

ELSE
NULL

END

ELSE
NULL

END
```

#### 7. Create Sales (YTD)



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I hope these steps were helpful in creating a way to measure the Fiscal Year MTD, QTD, and VTD in Tableau. If you have any questions about Tableau or other Business In' alligence solutions, please feel free to contact us.

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#### Author



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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.

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