

Financial Reporting with Rolling Years and Periods (Step 1 of 4)

If you have worked with Hyperion Financial Reporting, odds are good that you've come across report requirements for Rolling Years and Periods, that is to say a report that spans periods from multiple years. This is an easy build if your data source includes a single "rolling" dimension for 'Year' and 'Period' – you utilize the "RelativeMember" function to move up or down the hierarchy. The difficulty arises when programming this same logic into a report with separate 'Year' and 'Period' dimensions. A solution utilizing "Trigger" columns is shown below.

The use of what I call trigger columns allows for Hyperion Financial Reporting to display rolling Years and Periods, whether your requirement is for a 2 or 12 month rolling report. The Trigger section of the report requires both the 'Year' and 'Period' dimension to be columns on the report, while any dimension; such as Account or Product, can be included on the rows. The steps below detail a rolling 5-month solution.

Step 1: Add data columns for all 12 periods (Jan-Dec).

These columns will function as the Trigger section, essentially telling the other columns what the end-user selected for Period. This is important because later sections of the report require knowledge of the selected Period to ultimately decide what is displayed.

Keys:

- These 12 columns MUST be Data columns.
- These 12 columns MUST be hidden.

- The Period member selection MUST be set to “Current Point of View for Period”.
- The Year member can be any member – not relevant to the trigger.



- Optional: Overwrite the Period POV cell with the 12 periods (Jan-Dec) as shown below.

