

Financial Reporting with Rolling Years and Periods (Step 3 of 4)

Step 3: Adding Year and Period columns.

The columns added here will be those which are displayed to the users. The Trigger section added in steps 1 and 2 above will determine which range of Periods will ultimately be displayed to the users. The key to adding columns in this section of the report is to include ALL possible Periods that could be displayed to the end-user. The Trigger section of the report will essentially move & display a subset range of Periods. For example, If a user selected "Jan" as their current Period, The report will need to display Sep-Dec of the prior year.

Keys:

- These columns will be those displayed to the end-users.
- These columns MUST be Data columns.
- A rolling 5-month report will display Sep, Oct, Nov, Dec and Jan IF Jan is selected by the end-user.
- Either 'Substitution Variables' or the 'RelativeMember' function can be utilized for the Year dimension (ie. CurrentYear, CurrentYear-1, etc.).
- The Period members can be "hard-coded" into the report (don't use the POV Period option here).

