Slide 1

Slide notes: The concept of Period Mapping is not difficult to understand. IES has the ability to present Financial, Physical and other indicators on many kinds of Accounts for any Period of the User's choosing. For example, even though it may be August 2010 at the moment, we can choose on a Report to show the values as if it was actually May 2009, or for any other selected Period.

Slide 2

Slide notes: On the Templates that we use for Tags, and of course depending on the Template type, we commonly have a Field called 'Period Mapping'. This is the field that we can use to manipulate which Period answer will come up.
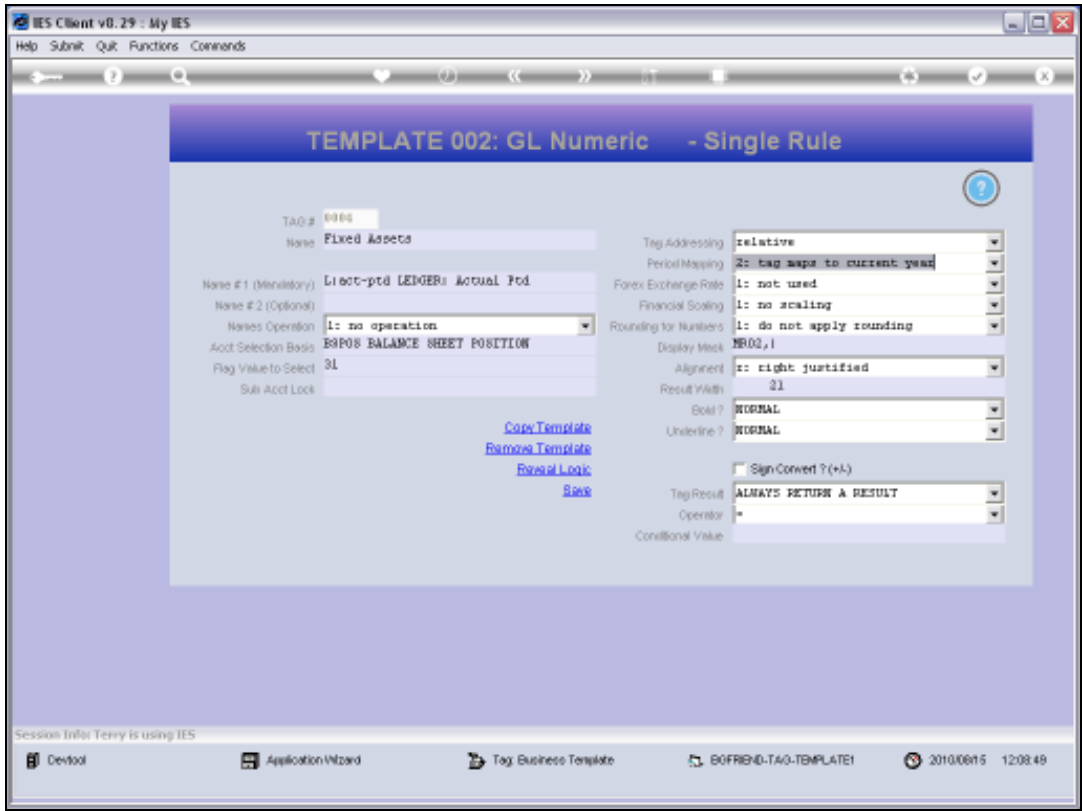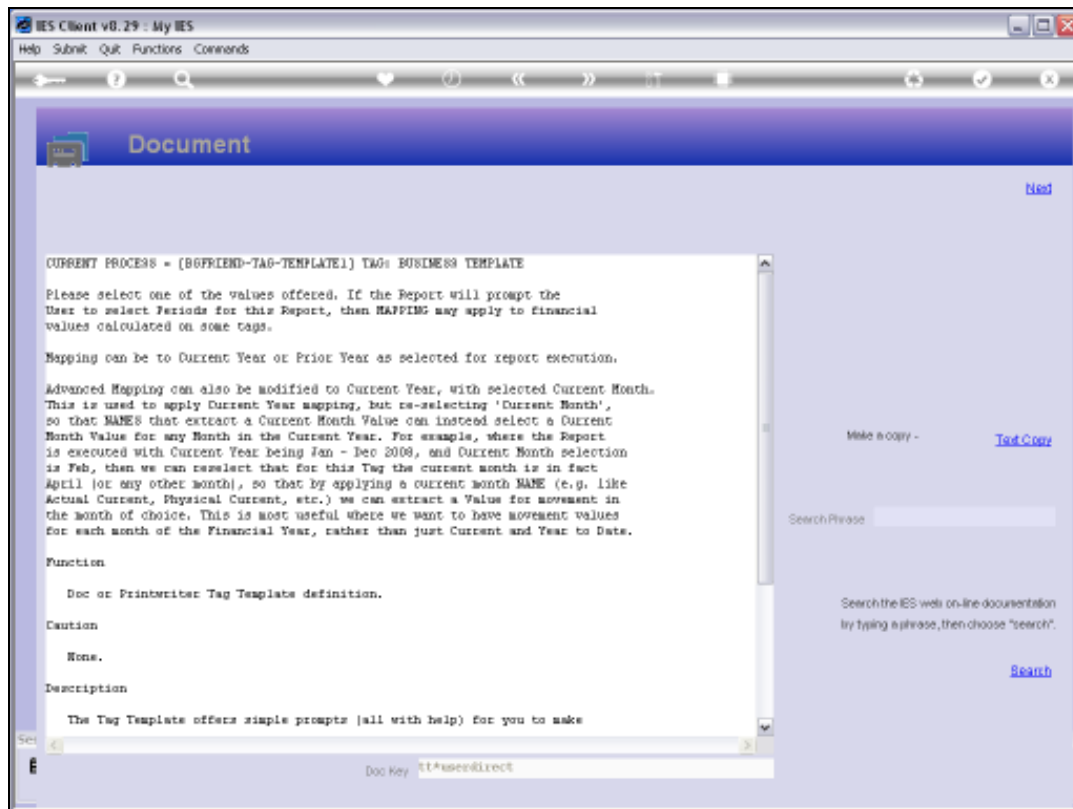
Slide 3
Slide notes:
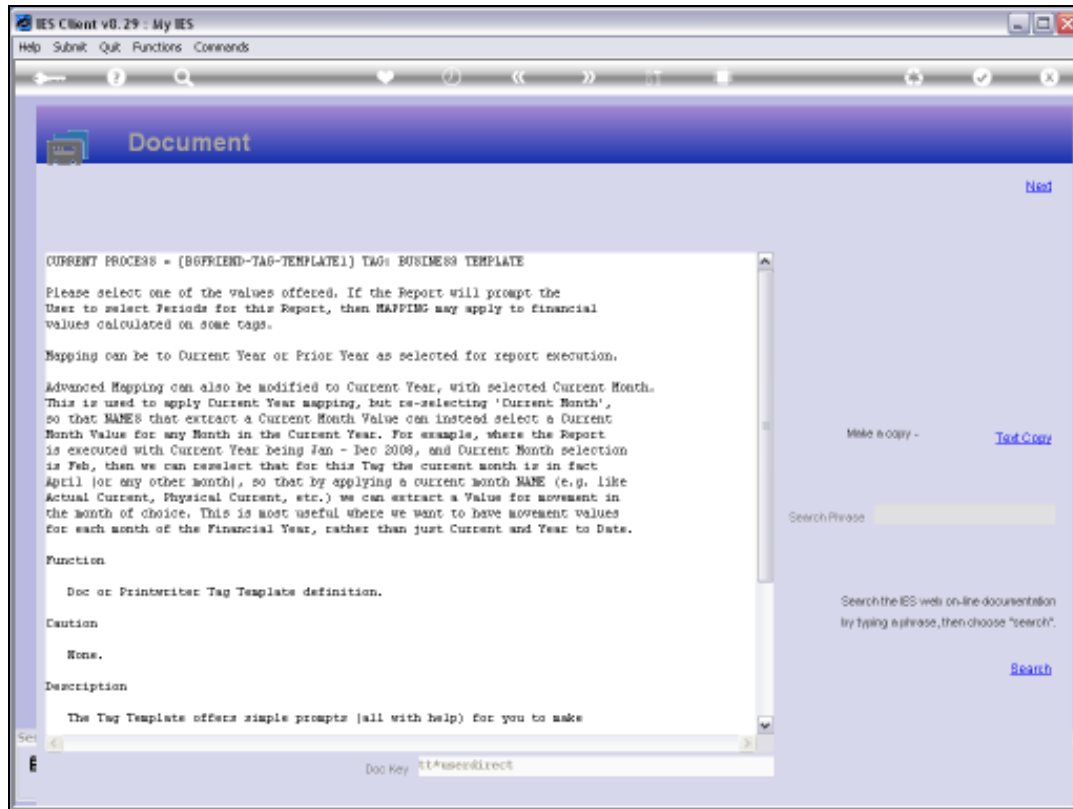
Slide 4

Slide notes: The Help for this Field explains that we can map to This Year or a Prior Year, and even for the individual Months in any selected Year.

Slide 5
Slide notes:

Slide 6

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Slide 8

Slide notes: We do that by selecting the desired option on the 'Period Mapping' field. The rest is determined by the User selected Period parameters when performing the Report.
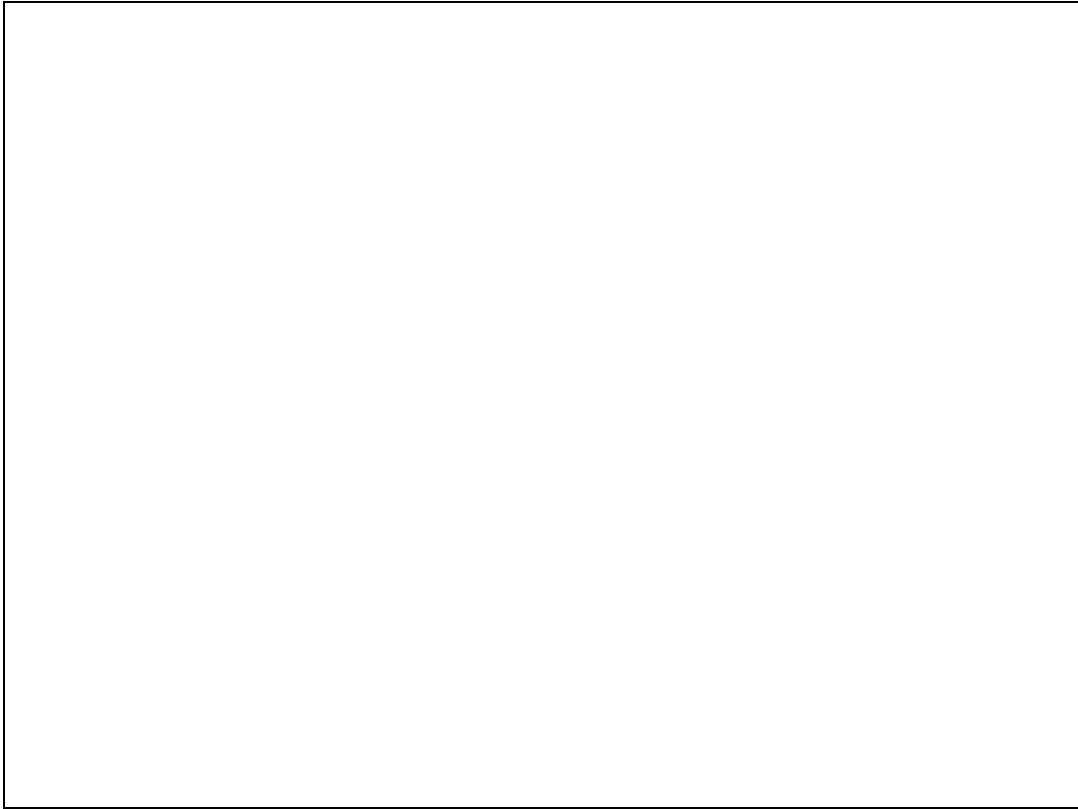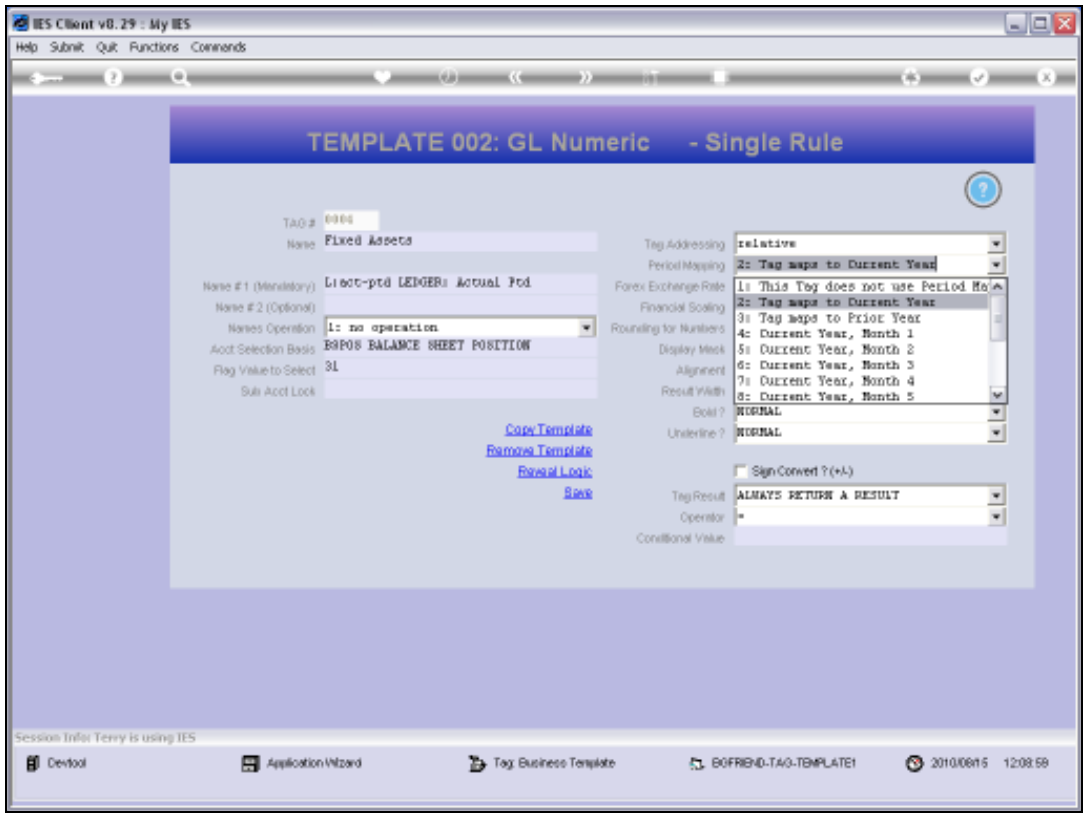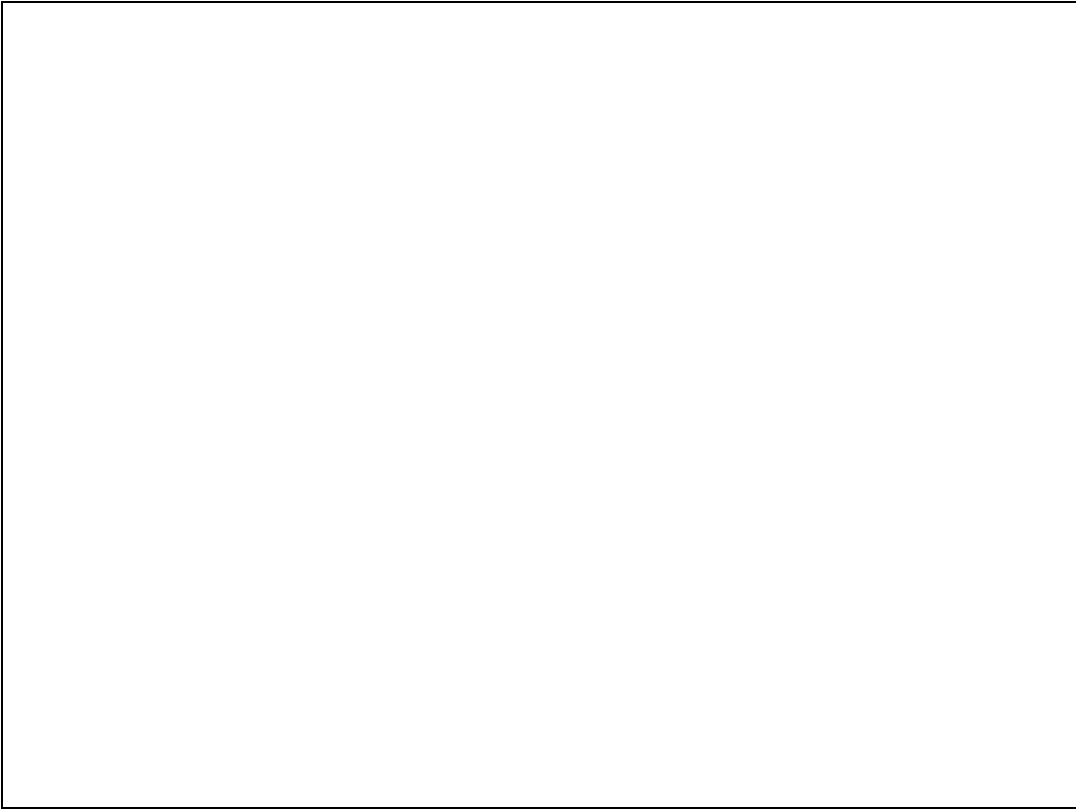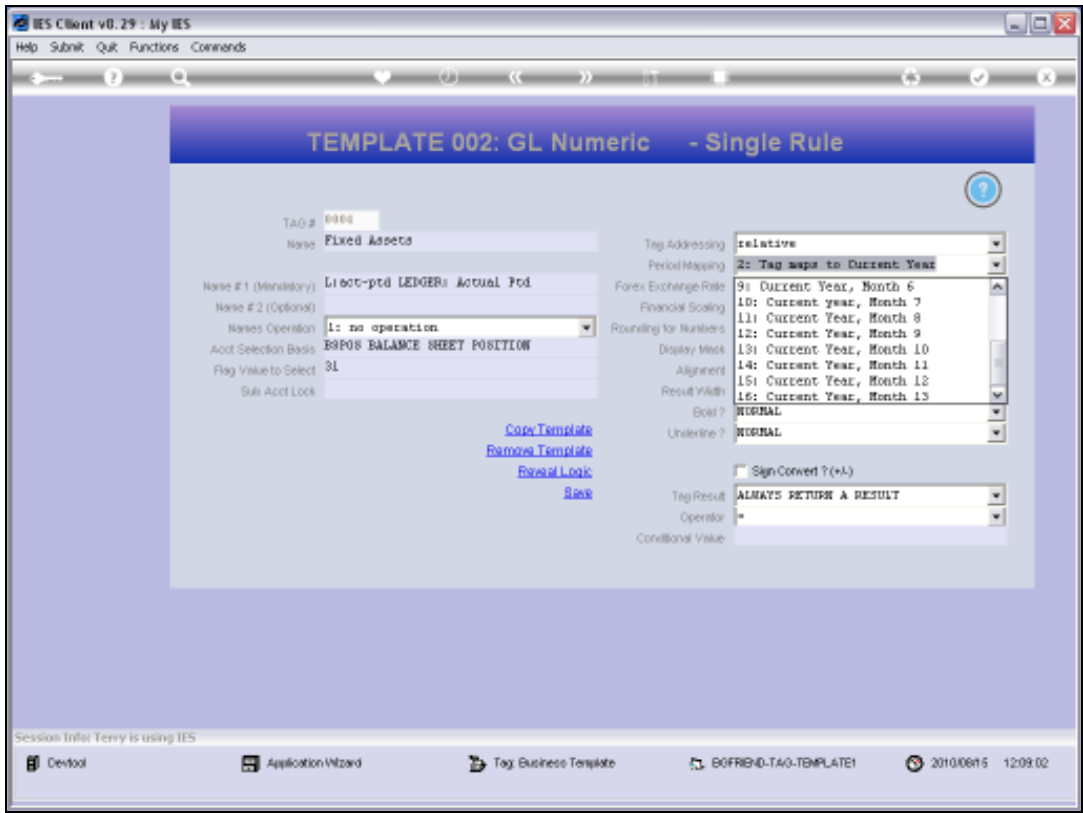
Slide 9
Slide notes:

Slide 10

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Slide 12
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Slide 13
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Slide 14

Slide notes: Here is a preview of a Balance Sheet Layout example, and in this example we compare the Balance Sheet values for This Year with Last Year. What the meaning of This Year and Last Year will be. All depends on what the User chooses when performing the Report, and that is why we have Tag 2 for This Year and Tag 3 for Last Year, as we do not know in advance what these Periods will be, and the User is going to select it when performing the Balance Sheet Report.

Slide 15
Slide notes:

Slide 16

Slide notes: Now, when we consider the Line for Fixed Assets on this Layout, we have Tag 4 for This Year, and we have Tag 5 for Last Year. Tag 4 is going to produce the answer for the total value of the Fixed Assets for This Year, and it all depends on which Period the User will select as This Year.

Slide 17

Slide notes: As a matter of fact, Tag 5 will do exactly the same thing as Tag 4, and the only difference between the 2 is that Tag 5 will 'map' to the Period that the User selects as Last Year. So that is what Period Mapping is all about - it is the ability to lock into a Period view of a certain Value selection.

Slide 18
Slide notes:

Slide 19

Slide notes: When this Report is performed, it comes up with a pre-run Screen like this. The system defaults Period values for This Year and Last Year, based on current real settings in the Business system, but the User is most welcome to change any of the indicated Periods and thereby choose a differently MAPPED view.
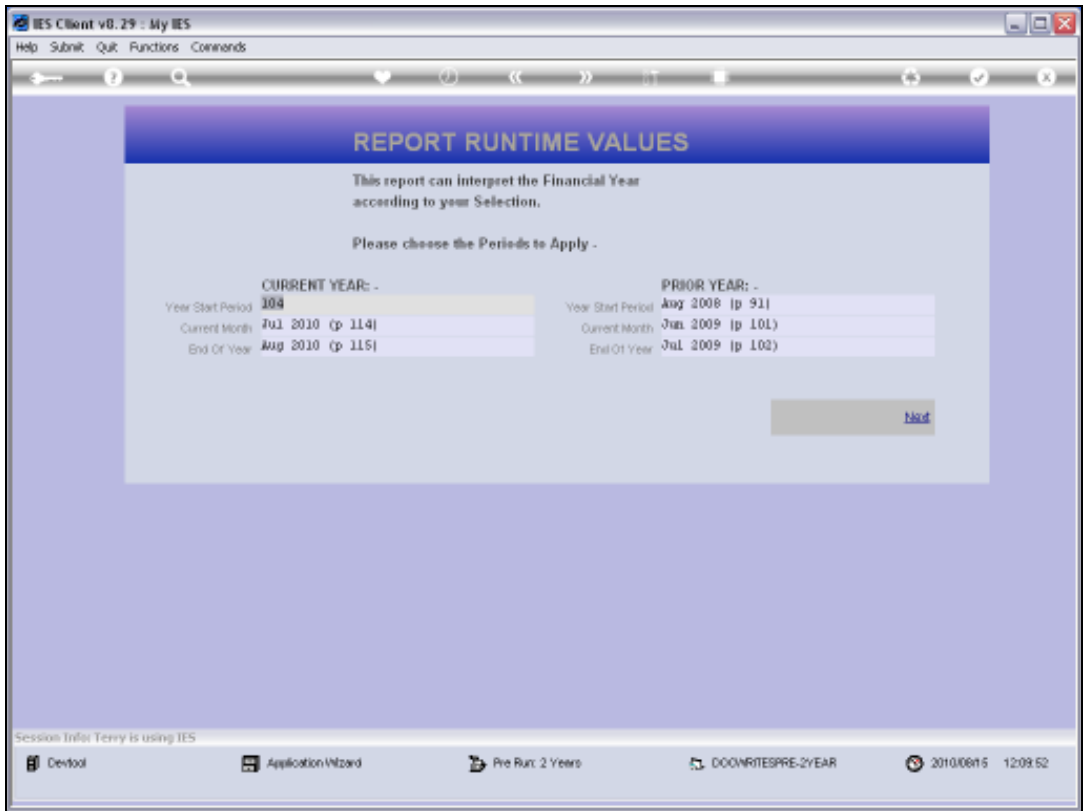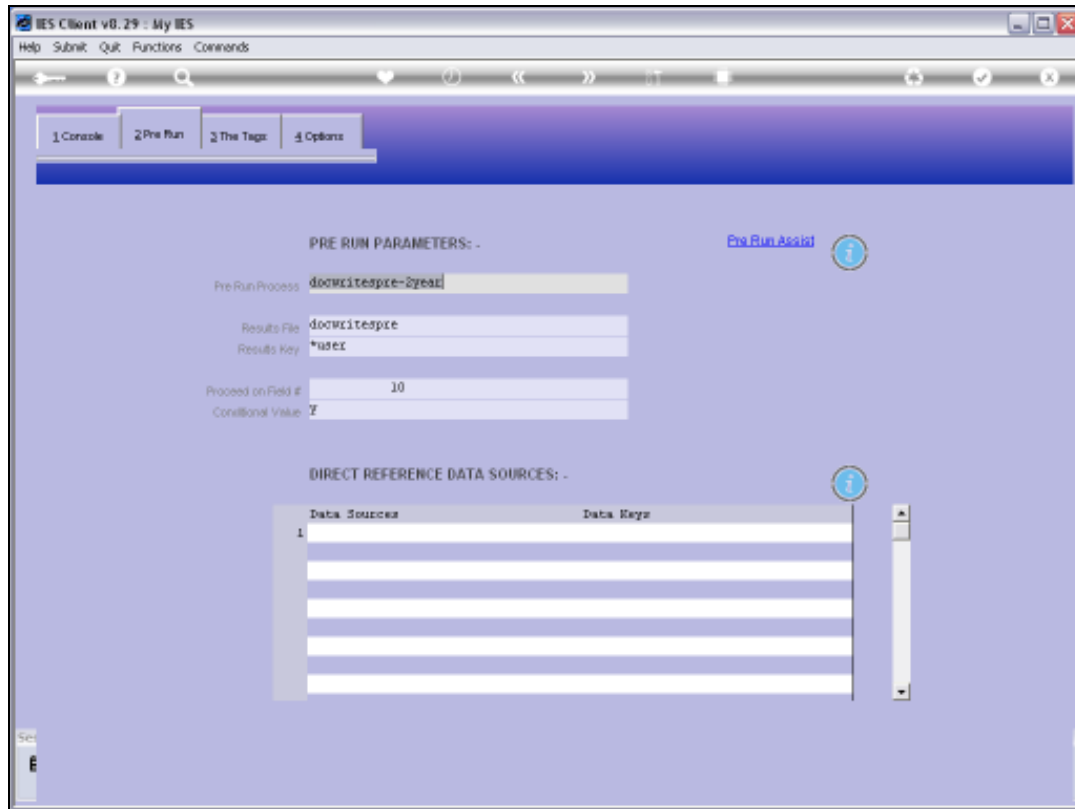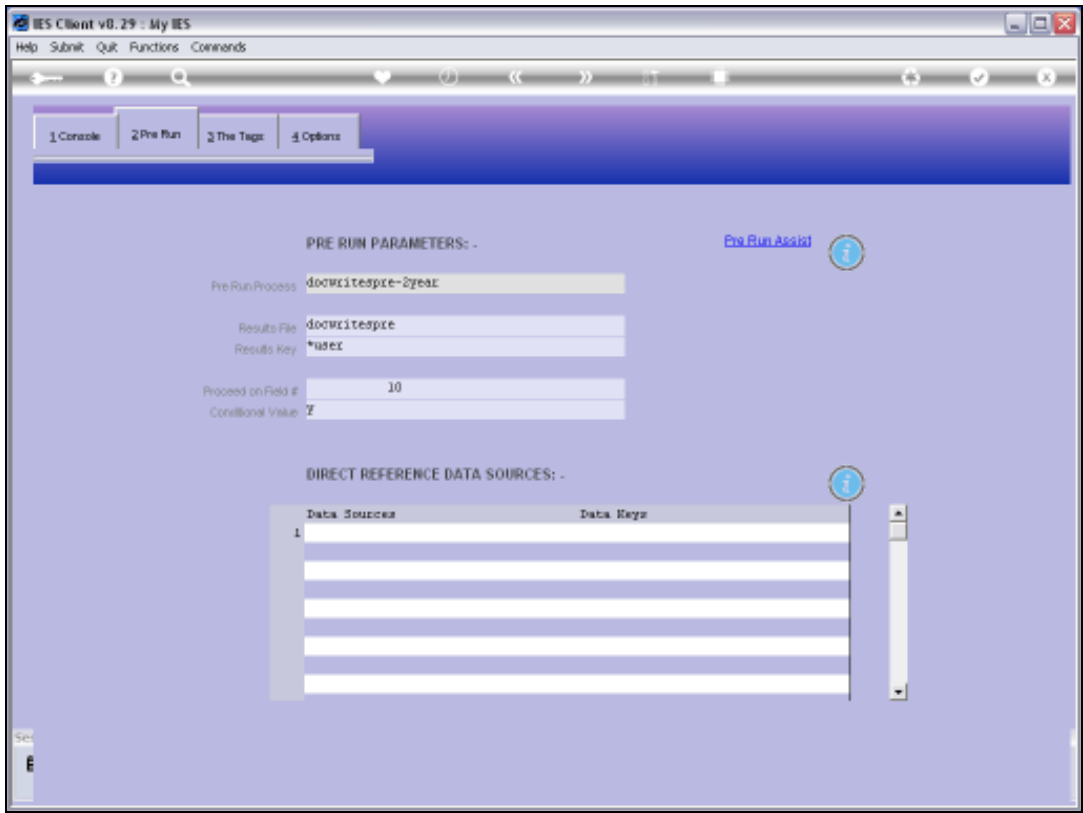
Slide 20
Slide notes:
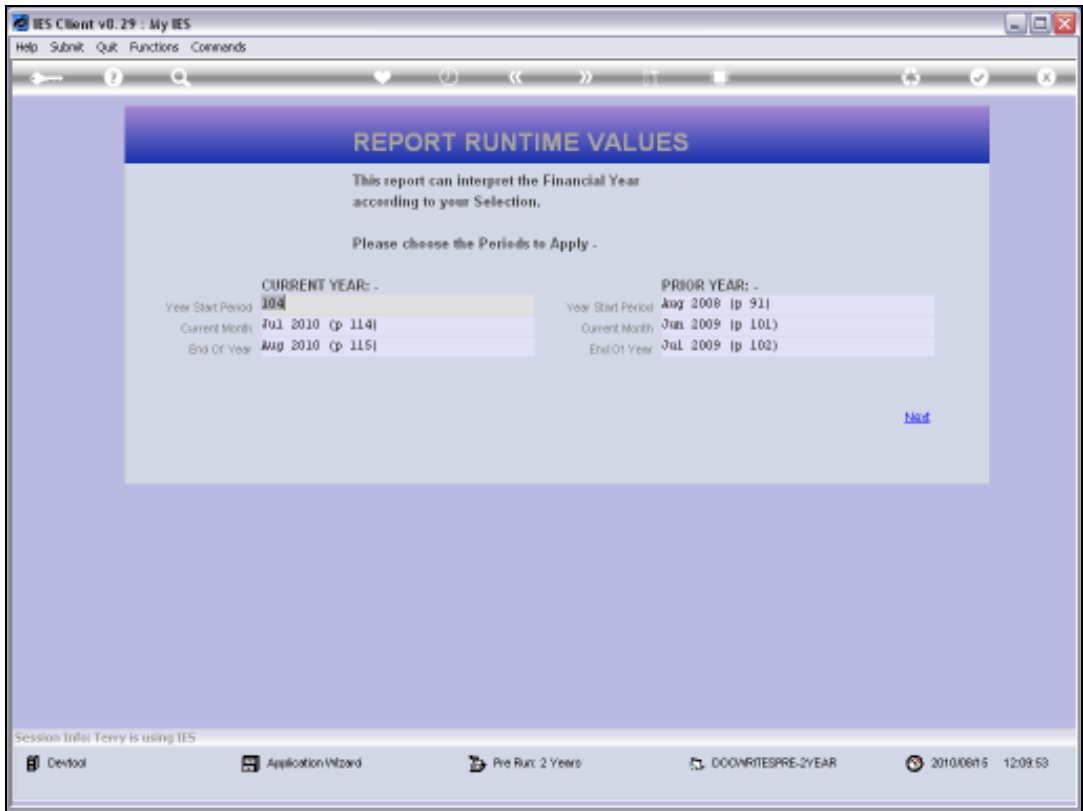
Slide 21
Slide notes:

Slide 22

Slide notes: That screen that allows the User to choose Period Mapping is part of the DocWriter Report, and is called a pre-run process.

Slide 23

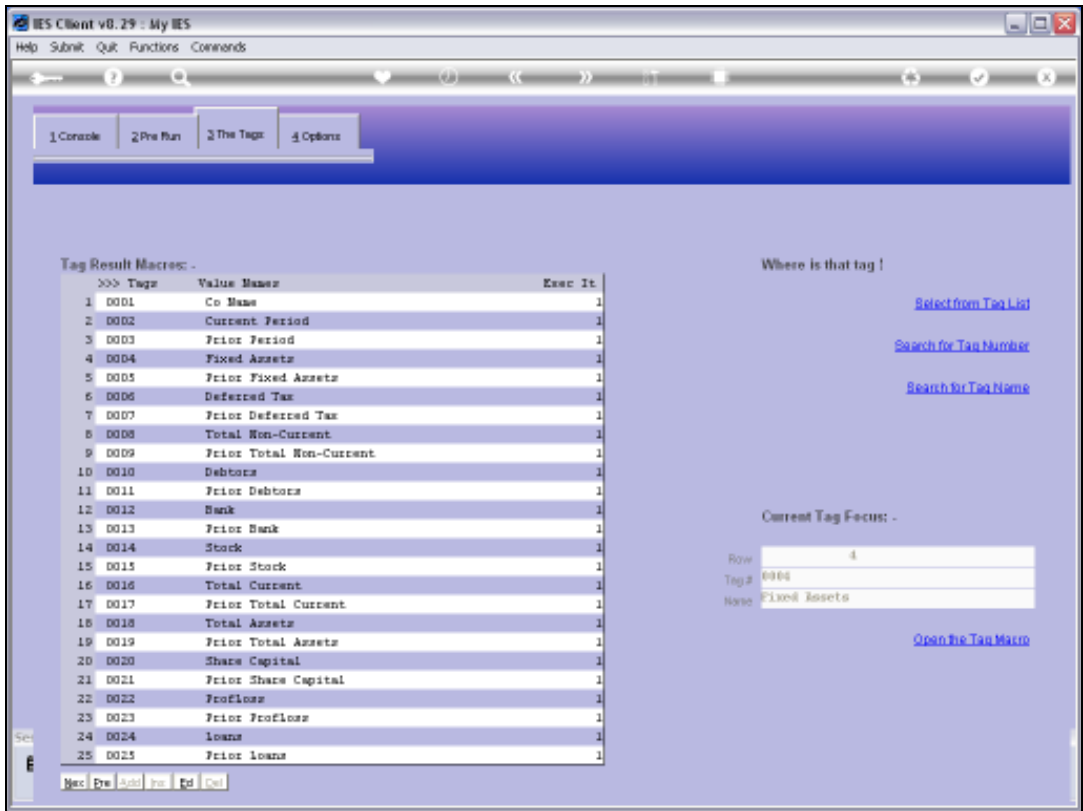Slide notes: Here is the name of the pre-run process, which can be selected with the 'Pre Run Assist' function.

Slide 24

Slide notes:

Slide 25

Slide notes: Now, to understand this clearly, we can have another look at Tag 4 for Total Fixed Asset Value at a selected Period, and then compare it with Tag 5. The only difference between the 2 Templates will be the Period Mapping setting because Tag 4 is for This Year and Tag 5 is for Last Year.

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Slide notes:

Slide 27

Slide notes: Tag 4 uses the name for 'Actual Period to Date', which produces the answer, and it is based on all Accounts selected where the BSPOS Flag = 31.

Slide 28

Slide notes: The Period Mapping points to This Year.

Slide 29
Slide notes:

Slide 30
Slide notes:
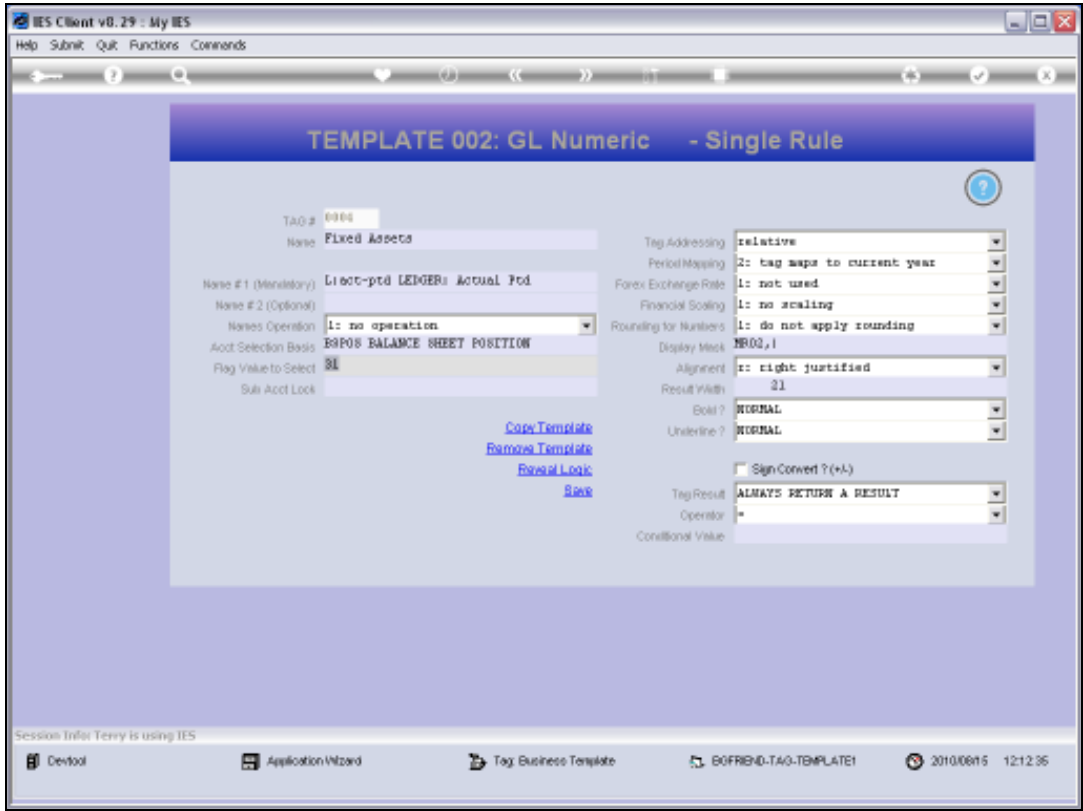
Slide 31
Slide notes:
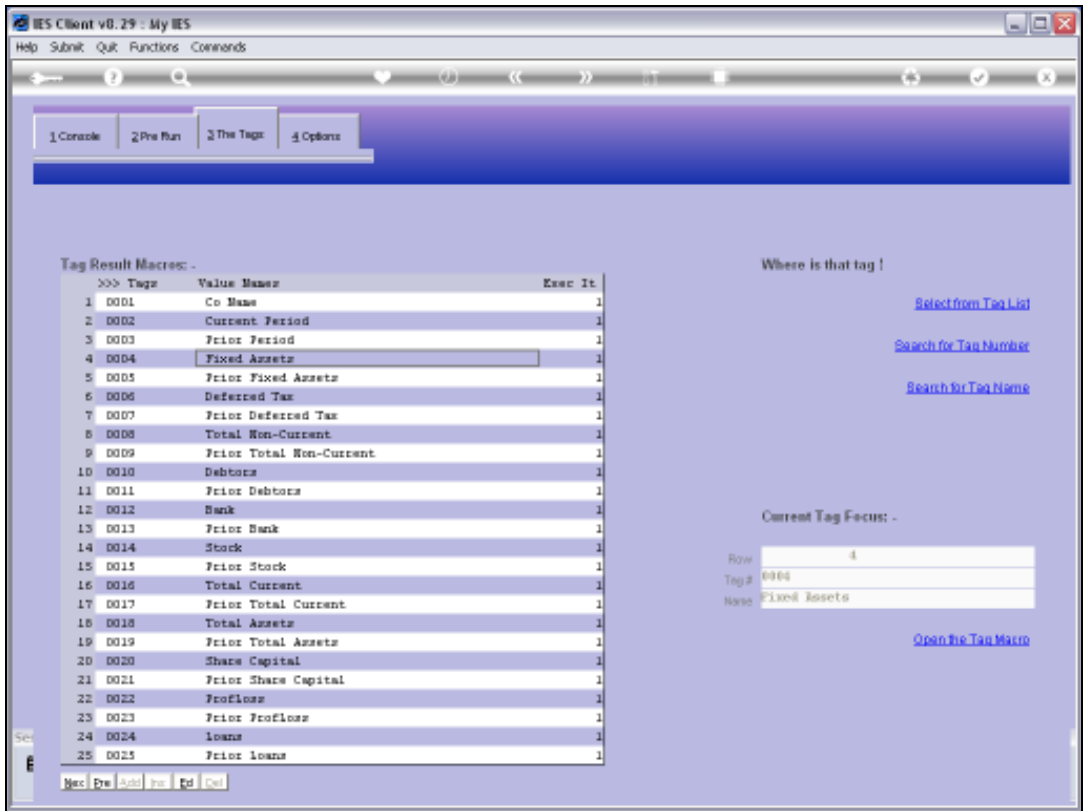
Slide 32

Slide notes:

Slide 33
Slide notes:

Slide 34

Slide notes: Tag 5 looks quite the same, except that the Period Mapping points to Last Year.

Slide 35
Slide notes:

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Slide notes:

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Slide notes:

Slide 38

Slide notes: And therein is the power of the Period Mapping setting on Tag Templates.