Package: busdater (via r-universe)

September 12, 2024

Type Package

Title Standard Date Calculations for Business

Version 0.2.1

Author Mick Mioduszewski [aut, cre]

Maintainer Mick Mioduszewski <mick@mioduszewski.net>

Description Get a current financial year, start of current month, End
of current month, start of financial year and end of it. Allow
for offset from the date.

License MIT + file LICENSE

URL https://mickmioduszewski.github.io/busdater/,
https://github.com/mickmioduszewski/busdater/

BugReports https://github.com/mickmioduszewski/busdater/issues

Imports lubridate

Suggests covr, knitr, rmarkdown, testthat

VignetteBuilder knitr

Encoding UTF-8

RoxygenNote 7.2.0

Repository https://mickmioduszewski.r-universe.dev

RemoteUrl https://github.com/mickmioduszewski/busdater

RemoteRef HEAD

RemoteSha 6e75dda02de96cb7dfba37f4c66206d7cfcec770

Contents

---

busdater-deprecated   *Deprecated functions in busdater*

Description

These functions still work but will be removed (defunct) in the next version.

Details

- FY
- period_boundaries

FY   *Get a financial year (deprecated).*

Description

FY() is a deprecated function. It returns the current financial year. It also returns financial year based on parameter dates, or financial year based on a parameter dates and offset_period in years.

Usage

```
FY(
  date = Sys.Date(),
  offset_period = 0,
  optFYstart = getOption("busdaterFYstart", default = "07-01")
)
```

Arguments

date	A date vector for which financial year is required. Date must be POSIXct or POSIXlt or Date objects.
offset_period	A positive or negative number coercible to integer to shift the year by, e.g. in the case of FY, -1 for previous year, 1 for next year. More generally in page_boundaries function it is a number of periods of a specified period type
optFYstart	A string in the format of "MM-DD" representing the start of financial year, e.g. "01-01" for 1st of January or "07-01" for 1st of July. This package caters for financial years that have a fixed start date. It does not cater for moving dates e.g. last Friday of September.

Value

An integer vector containing the current financial year if offset offset_period is 0, otherwise add the offset offset_period in years.

See Also

Other business date functions: get_boundary(), get_fy(), period_boundaries()

Examples

```
FY() # deprecated function returns the current financial year as integer

dt <- as.Date(c("01-01-2018", "15-12-2017"), "%d-%m-%Y")
FY(date = dt[1])
FY(date = dt)

FY(offset_period = 1) ## return the next financial year as integer
FY(date = dt[1], offset_period = 1)
FY(date = dt, offset_period = 1)

FY(offset_period=-1) ## return the previous financial year as integer
FY(date = dt[1], offset_period = -1)
FY(date = dt, offset_period = -1)


## Not run:
FY("a") ## will fail because dates are expected.

## End(Not run)
```

---

get_boundary   *Get date's business period boundary.*

Description

The get_boundary will shift the input date vector by a number of months and years i.e. date + offset_period * offset_type. It will handle the typical business date arithmetic.

Usage

```
get_boundary(
  date = Sys.Date(),
  offset_period = 0,
  offset_type = "year",
  bus_period = "FY",
  boundary = "1st day",
  opt_fy_start = getOption("busdaterFYstart", default = "07-01")
)
```

Arguments

date	A date vector for which financial year is required. Date must be POSIXct or POSIXlt or Date objects.
offset_period	A positive or negative number coercible to integer to shift the year by, e.g. in the case of get_fy, -1 for previous year, 1 for next year. More generally in page_boundaries function it is a number of periods of a specified period type
offset_type	It is either "month" or "year"
bus_period	It is either "get_fy" for financial year, "CE" for calendar year or "M" for month
boundary	Either "1st day" for the first day of the period or "last day" for the end of the period.
opt_fy_start	A string in the format of "MM-DD" representing the start of financial year, e.g. "01-01" for 1st of January or "07-01" for 1st of July. This package caters for financial years that have a fixed start date. It does not cater for moving dates e.g. last Friday of September.

Value

A vector of dates.

See Also

Other business date functions: FY(), get_fy(), period_boundaries()

Examples

```
# the 1st day of the current financial year
get_boundary()

# the last day of the current financial year
get_boundary(boundary = "last day")

# the last day of the last calendar year
get_boundary(offset_period = -1, bus_period = "CY", boundary = "last day")

# the last day of month 14 months from now
get_boundary(offset_period = 14, offset_type = "month",
             bus_period = "M", boundary = "last day")

# The first day of financial years for dates 3 months before the given dates
get_boundary(as.Date(c("02/27/1992", "09/28/2022"), "%m/%d/%Y"),
             offset_period = -3, offset_type = "month",
             bus_period = "FY", boundary = "1st day")
```

---

get_fy   *Get a financial year.*

Description

`get_fy()` returns the current financial (fiscal) year. It also returns financial year based on parameter dates, or financial year based on a parameter dates and offset_period in years.

Usage

```
get_fy(
  date = Sys.Date(),
  offset_period = 0,
  opt_fy_start = getOption("busdaterFYstart", default = "07-01")
)
```

Arguments

date	A date vector for which financial year is required. Date must be POSIXct or POSIXlt or Date objects.
offset_period	A positive or negative number coercible to integer to shift the year by, e.g. in the case of `get_fy`, -1 for previous year, 1 for next year. More generally in `page_boundaries` function it is a number of periods of a specified period type
opt_fy_start	A string in the format of "MM-DD" representing the start of financial year, e.g. "01-01" for 1st of January or "07-01" for 1st of July. This package caters for financial years that have a fixed start date. It does not cater for moving dates e.g. last Friday of September.

Value

An integer vector containing the current financial year if offset `offset_period` is 0, otherwise add the offset `offset_period` in years.

See Also

Other business date functions: [FY()](#), [get_boundary()](#), [period_boundaries()](#)

Examples

```
get_fy() ## return the current financial year as integer

dt <- as.Date(c("01-01-2018", "15-12-2017"), "%d-%m-%Y")
get_fy(date = dt[1])
get_fy(date = dt)

get_fy(offset_period = 1) ## return the next financial year as integer
get_fy(date = dt[1], offset_period = 1)
get_fy(date = dt, offset_period = 1)
```

```
get_fy(offset_period=-1) ## return the previous financial year as integer
get_fy(date = dt[1], offset_period = -1)
get_fy(date = dt, offset_period = -1)


## Not run:
get_fy("a") ## will fail because dates are expected.

## End(Not run)
```

---

period_boundaries   *Get date's business period boundary (deprecated).*

Description

The `period_boundaries` is a deprecated function. It will shift the input `date` vector by a number of months and years i.e. `date + offset_period * offset_type`. It will handle the typical business date arithmetic.

Usage

```
period_boundaries(
  date = Sys.Date(),
  offset_period = 0,
  offset_type = "year",
  bus_period = "FY",
  boundary = "1st day",
  optFYstart = getOption("busdaterFYstart", default = "07-01")
)
```

Arguments

date	A date vector for which financial year is required. Date must be POSIXct or POSIXlt or Date objects.
offset_period	A positive or negative number coercible to integer to shift the year by, e.g. in the case of FY, -1 for previous year, 1 for next year. More generally in `page_boundaries` function it is a number of periods of a specified period type
offset_type	It is either `"month"` or `"year"`
bus_period	It is either `"FY"` for financial year, `"CE"` for calendar year or `"M"` for month
boundary	Either `"1st day"` for the first day of the period or `"last day"` for the end of the period.
optFYstart	A string in the format of "MM-DD" representing the start of financial year, e.g. "01-01" for 1st of January or "07-01" for 1st of July. This package caters for financial years that have a fixed start date. It does not cater for moving dates e.g. last Friday of September.

Value

A vector of dates.

See Also

Other business date functions: FY(), get_boundary(), get_fy()

Examples

```
# the 1st day of the current financial year
period_boundaries()

# the last day of the current financial year
period_boundaries(boundary = "last day")

# the last day of the last calendar year
period_boundaries(offset_period = -1, bus_period = "CY",
                  boundary = "last day")

# the last day of month 14 months from now
period_boundaries(offset_period = 14, offset_type = "month",
                  bus_period = "M", boundary = "last day")

# The first day of financial years for dates 3 months before the given dates
period_boundaries(as.Date(c("02/27/1992", "09/28/2022"), "%m/%d/%Y"),
                  offset_period = -3, offset_type = "month",
                  bus_period = "FY", boundary = "1st day")
```

Index