

Power BI Setup: Highlight vs. To-Date Actuals

Step-by-step setup to handle month filters with either **Highlighted Actuals** or **Up to Selected Month Actuals**.

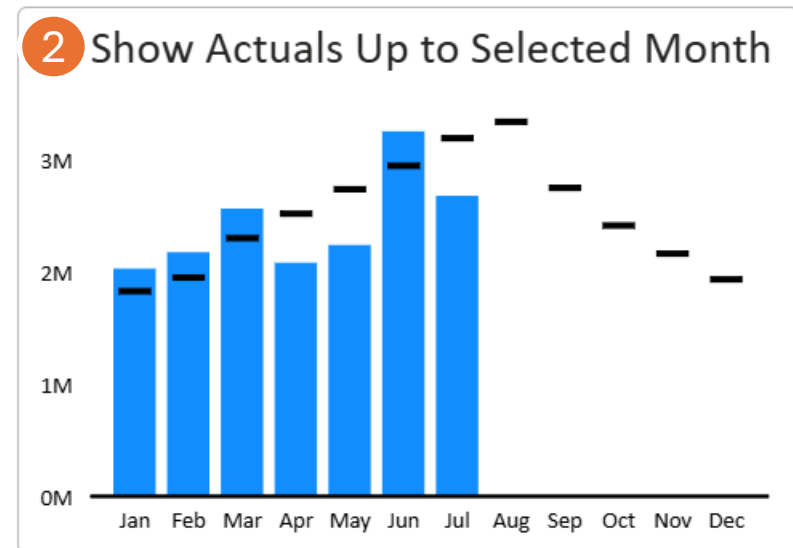
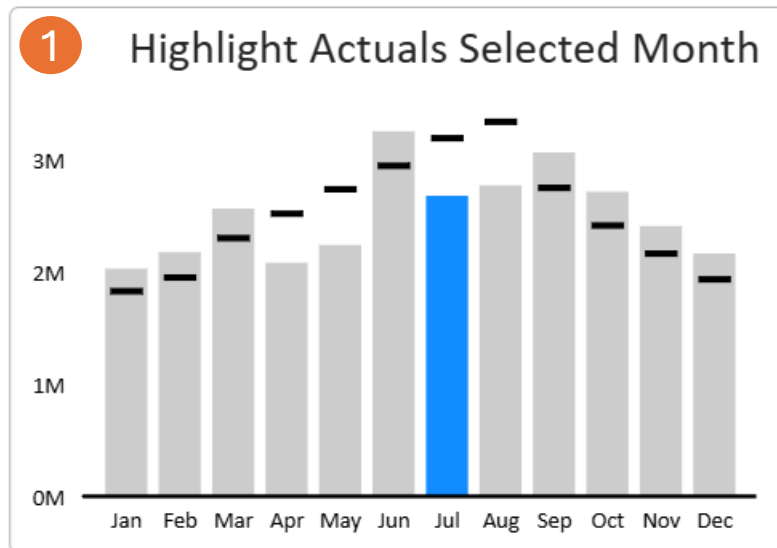
Year

Month

2024

Jul

July 2024



Initial setup - create measures for Actual and Previous Year

1 1 _Revenue Actual = SUM(fact_table[Revenue])

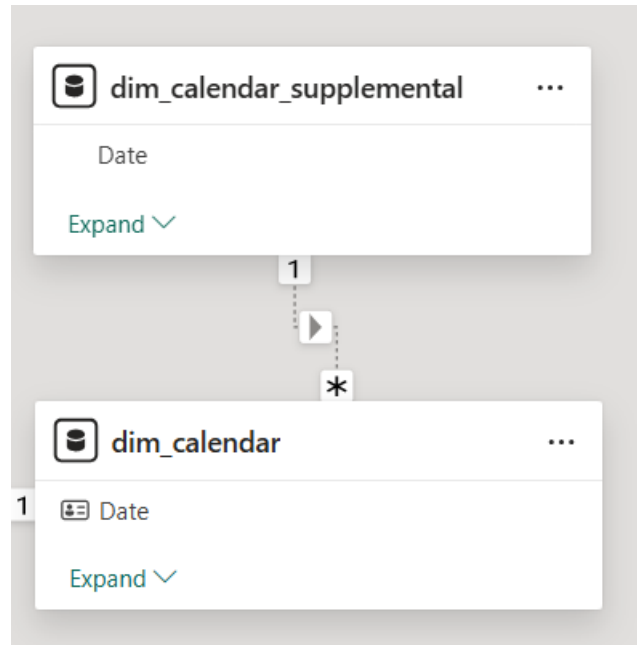
2 1 _Revenue Previous Year =
3 2 CALCULATE (
4 3 [_Revenue Actual],
5 4 DATEADD ('dim_calendar'[Date], -1, YEAR)
6 5)

These measures are likely already in your model.

 **Important:** Ensure a Dim Calendar table is present and related to your fact table(s)



Initial setup - Create a Dim Calendar Supplemental table



Create a Dim Calendar **supplemental** table (in Power Query or with DAX) and create an **inactive one to many relationship** between the main and supplemental Dim Calendar tables.



Initial setup - Create Previous Year measure based on supplemental Calendar table

```
1 _Revenue Previous Year suppl =  
2 VAR __StartDate =  
3 |     STARTOFYEAR ( dim_calendar[Date] )  
4 VAR __EndDate =  
5 |     ENDOFYEAR ( dim_calendar[Date] )  
6 VAR __DateRange =  
7 |     DATESBETWEEN ( dim_calendar[Date], __StartDate, __EndDate )  
8 VAR __Result =  
9 |     CALCULATE (  
10 |         [_Revenue Previous Year],  
11 |         __DateRange,  
12 |         USERELATIONSHIP ( 'dim_calendar_supplemental'[Date], 'DIM_Calendar'[Date] )  
13 |     )  
14 RETURN  
15 |     __Result  
16 |
```

This measure returns all months from previous year, regardless of the slicer's selected month.



Scenario 1. Highlight Actuals Selected Month

Create measure for Actuals – all months

```
1 _Revenue Actual - all months =  
2 VAR __StartDate =  
3 |   STARTOFYEAR ( dim_calendar[Date] )  
4 VAR __EndDate =  
5 |   ENDOFYEAR ( dim_calendar[Date] )  
6 VAR __DateRange =  
7 |   DATESBETWEEN ( dim_calendar[Date], __StartDate, __EndDate )  
8 VAR __Result =  
9 |   CALCULATE (  
10 |       [_Revenue Actual],  
11 |       __DateRange,  
12 |       USERELATIONSHIP ( 'dim_calendar_supplemental'[Date], 'DIM_Calendar'[Date] )  
13 |   )  
14 RETURN  
15 |   __Result  
16
```

This measure returns all year's months from selected year, regardless of the slicer's selected month.



Scenario 1. Highlight Actuals Selected Month

Create measure for conditional formatting / highlight selected month

```
1 _Month is Selected Month =  
2 VAR __SelectedMonth = MAX( dim_calendar[Month] )  
3 VAR __SupplMonth = MAX( dim_calendar_supplemental[Month] )  
4  
5 VAR __Result =  
6     IF (  
7         __SupplMonth = __SelectedMonth,  
8         "#118DFF", // highlight color  
9         "#CCCCCC"  
10    )  
11  
12 RETURN __Result
```

Set column (hex) color for selected month and for other months

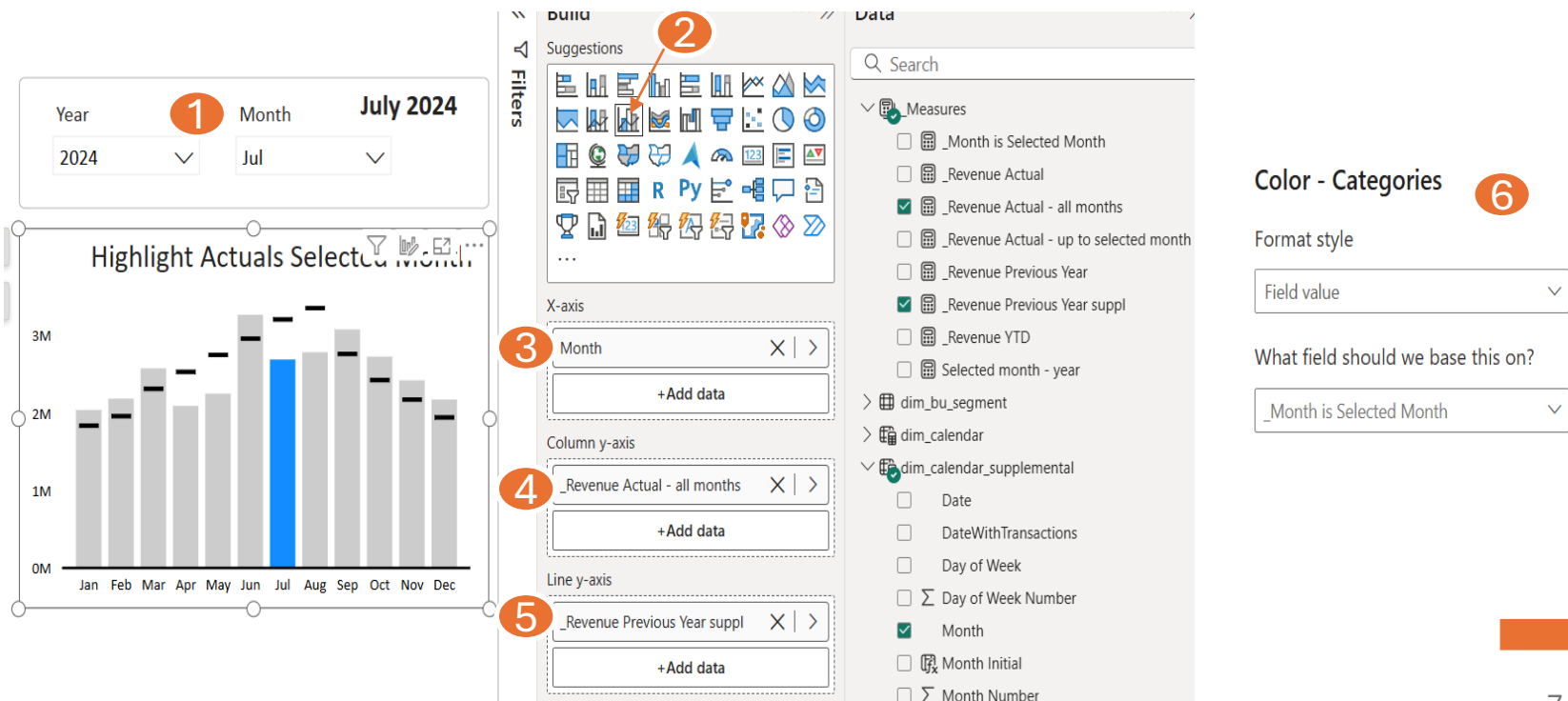


Scenario 1. Highlight Actuals Selected Month



Final setup

1. Add a Year and Month slicer to the canvas based on the **main** calendar table
2. Add a line and clustered column chart to the canvas
3. Set 'Month' from the **supplemental** calendar table as X-axis
4. Set [_Revenue Actual – all months] as Column y-axis
5. Set [_Revenue Previous Year suppl] as Line y-axis (turn line off and marker on)
6. Add cond. formatting to the columns based on measure [_Month is Selected Month]



Scenario 2. Show Actuals Up to Selected Month

Create measure for Actuals Up to Selected Month

```
1 _Revenue Actual - up to selected month =
2 VAR __StartDate =
3     STARTOFYEAR ( dim_calendar[Date] )
4 VAR __EndDate =
5     MAX ( dim_calendar[Date] )
6 VAR __DateRange =
7     DATESBETWEEN ( dim_calendar[Date], __StartDate, __EndDate )
8 VAR __Result =
9     CALCULATE (
10         [_Revenue Actual],
11         __DateRange,
12         USERELATIONSHIP ( 'dim_calendar_supplemental'[Date], 'DIM_Calendar'[Date] )
13     )
14 RETURN
15     __Result
16
```

The EndDate variable takes care of excluding future months (MAX (DimCalendar[Date]) from slicer selection).

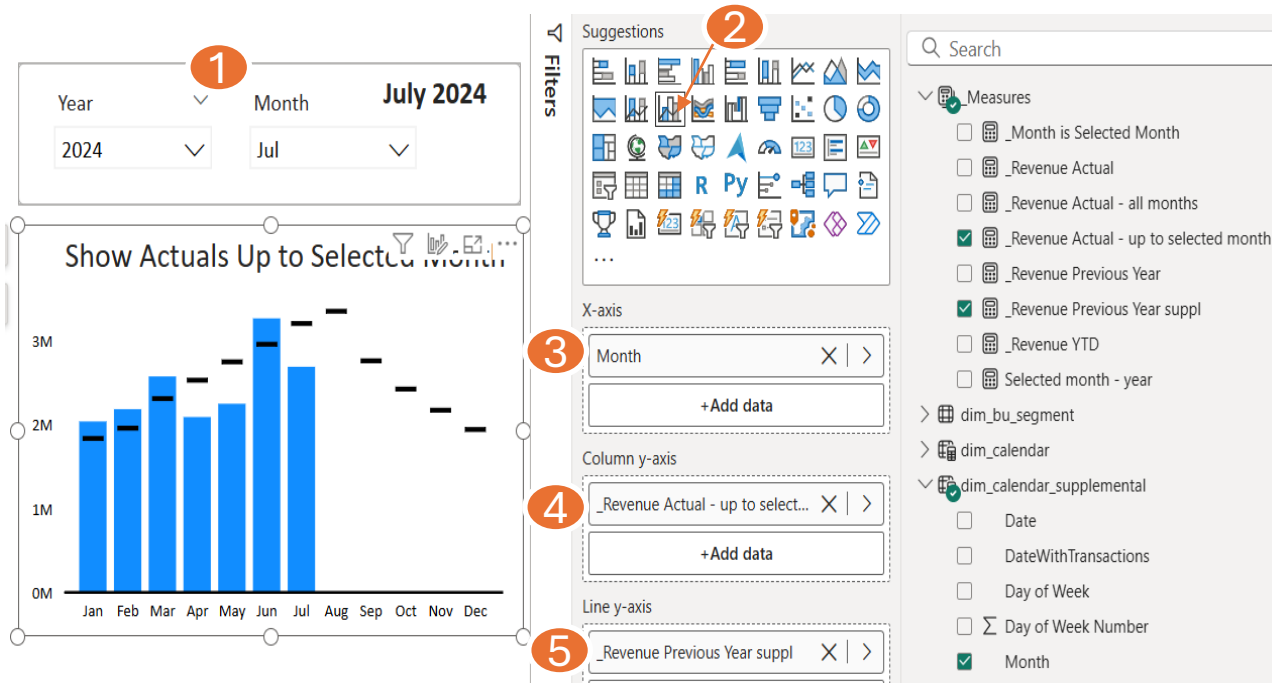


Scenario 2. Show Actuals Up to Selected Month



Final setup

1. Add a Year and Month slicer to the canvas based on the **main** calendar table
2. Add a line and clustered column chart to the canvas
3. Set 'Month' from the **supplemental** calendar table as X-axis
4. Set [_Revenue Actual – up to selected month] as Column y-axis
5. Set [_Revenue Previous Year suppl] as Line y-axis (turn line off and marker on)





I hope this was helpful!



Feel free to reach out if you have any questions.