**Quick Guide – 6 KPI Variants in Power BI**

*Using the native Line and Clustered Column chart*

**A screenshot of a graph

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**Introduction**The purpose of this Quick Guide is to help you get started, but it does not explain every detail. A solid basic – or preferably more advanced – understanding of Power BI will likely be required to reproduce the visuals.

It also helps if you are already familiar with the **new Card visual** and the use of **data/reference labels**.

There are two versions:

* One with an **MTD (Month-to-Date) / YTD (Year-to-Date) switch**
* And one without

The version without the switch contains fewer measures and therefore performs slightly better.

For each version, an **Excel documentation file** is included that describes all measures and specifies which ones are used per KPI.

**Prerequisites**

Before building the visuals, it’s important to set up the model correctly. These KPI variants rely on using a **supplemental calendar table** in combination with your main dim\_calendar table.

**Purpose**  
The supplemental calendar allows you to display Actuals only up to the selected month, while still keeping full-year values for the Comparison columns (PY, Budget, Forecast).

1. Create a **duplicate** of your main Dim Calendar table (or generate a new one). Name it dim\_calendar\_supplemental for example.
2. Create an **inactive one-to-many relationship** between the Dim Calendar Supplemental table and Dim Calendar table.

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1. In Dim Calendar Supplemental table, sort Month Initial by Month Number to ensure proper axis order (sorting Month Initial by Month Number avoids alphabetical order issues).

Want to learn more about the technique of using a supplemental calendar table? Check out this resources:

SQLBI  
https://www.sqlbi.com/articles/show-previous-6-months-of-data-from-single-slicer-selection/  
Goodly  
https://www.youtube.com/watch?v=k0I-khGGXE4

**Step 1 – Open Documentation**

1. Open **Power BI Measures Documentation.xlsx**.
2. Select the KPI visual (1–6) you want to reproduce.
3. Identify the required measures:

* **Reference measures** (not placed directly in the visual, but used by other measures).
* **Visual usage measures** (directly placed in the chart).

1. Recreate these measures in your own model (some may already exist).

**Step 2 – Build Visual**

1. Use the **Line & Clustered Column Chart**.
2. **X-Axis**: Select Month Initial from dim\_calendar\_supplemental.
3. **Year/Month slicer**: Use the main dim\_calendar.
4. Add the measures to the chart **as shown in the sample .pbix** and indicated in the Excel file (green-highlighted cells).
5. **Set the formatting** of the visual (data labels, axis, colors, etc.) and also check the **General Notes** below for important tips.

**General Notes**

**Rename**: In *Build* → rename the measure for variance data label position to PY: (this series name is used as the data label title).

**Align zeros**: Always enable *Align zeros* for secondary Y-axis.

**Lines:** All lines must be *turned off*, except for **Visual 6**.

**Data Label position**: Always set to *Above*.  
**Zero reference line**: Add a black zero reference line for a cleaner look.

**Dynamic format strings:** Applied to AC and PY data labels so that values are automatically shown in K or M, depending on their scale.

**Responsive OFF**: In *Advanced options*, turn off *Responsive*. Otherwise PY values may shrink compared to delta labels (Power BI bug?).

**Scaling**: If you resize the visual, you may need to tweak Y-axis scaling factors (14.1, 16.1, 22.1, 24.1, 26.1 in version w/o MTD/YTD switch) so data labels remain correctly aligned.

**MTD/YTD switch**: In the version with MTD/YTD, add a **disconnected table** (e.g. TBL Time Period with rows MTD and YTD) and use a slicer on it. The measures check the selected value from this table to dynamically switch between Month-to-Date and Year-to-Date calculations.

**Tooltips**: Disabled by default; optionally add a custom tooltip.

I hope this is helpful!

Questions or feedback?

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