

POWER BI ADVANCED FORMATTING

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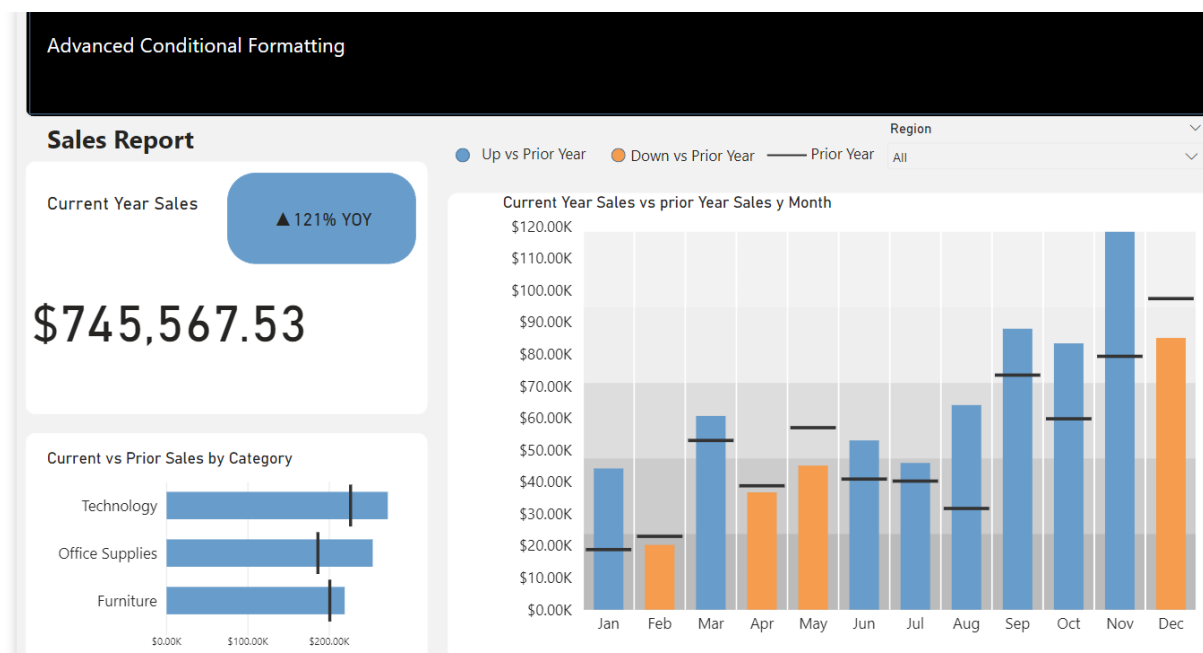
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Introduction

Conditional formatting is a robust feature in Power BI that you can leverage to help users gain insights. Typically, we see conditional formatting applied to the table and matrix visuals. For example, you might apply a background colour, font colour, or icons to the values based on a set of rules.

Conditional formatting of tables is valuable, but the capabilities in Power BI go beyond that. You can even conditionally format shape colours!

I will apply conditional colour formatting to visual backgrounds, borders, and bars. As you can see in the example below, the colours dynamically change as you select different regions and bars on the charts.



Requirements

1. Get the Data
2. Change the default visual interaction from cross highlighting to cross filtering.
Options and settings > options > CURRENT FILE > Report Settings
3. Optional – After importing the data, use or create a dedicated calendar table with the following columns: Date; Year; Month Name; Current Year (True/False); Prior Year (True/False); Month Number.
 - Connect the calendar table to the orders table on the date field with a many to one relationship.

➤ Current Year

Current Year =

```
'Calendar'[Year] = YEAR (TODAY())
```

➤ Date

Calendar =

```
CALENDAR (  
    DATE (YEAR ( MIN ( Orders[Order Date] ) ), 1, 1 ),  
    DATE (YEAR ( MAX ( Orders[Order Date] ) ), 12, 31 )  
)
```

➤ Month Name

Month Name =

```
FORMAT ('Calendar'[Date], "mmm" )
```

➤ Month Number

Month Number =

```
MONTH ( 'Calendar'[Date] )
```

➤ Prior Year

Prior Year =

```
'Calendar'[Year] = YEAR (TODAY()) - 1
```

➤ Year

Year =

```
YEAR ( 'Calendar'[Date] )
```

4. Create measures for:

➤ Total Sales:

Total Sales =

--Sum of sales

SUM (orders[sales])

➤ Total Sales Current Year (CY):

Total Sales CY =

--Sum of sales for the current year

CALCULATE ([Total Sales], 'Calendar'[Current Year] = TRUE())

➤ Total Sales Prior Year (PY):

Total Sales PY =

--Sum of sales for the prior year

CALCULATE ([Total Sales], 'Calendar'[prior Year] = TRUE())

➤ Total Sale in Year over Year:

Total Sales YOY =

--Difference in sales between the current and prior year

[Total Sales CY] - [Total Sales PY]

➤ Total Sales YOY Indicator:

Total Sales YOY Indicator =

--Used to create a formatted year-over-year sales indicator for the Current Year Sales KPI

IF ([Total Sales YOY] > 0, "▲", "▼")

& FORMAT (ABS([Total Sales YOY Percent Change]), "%%" & " YOY")

➤ Total Sales YOY Percent change

Total Sales YOY percent change =

--Percentage difference in sales between the current and prior year

DIVIDE ([Total Sales CY], [Total Sales PY])

➤ YOY Sales Colour Alternative:

YOY Sales Colour (alternative) =

--Creates a binary 0 or 1 value used for conditional formatting

IF ([Total Sales YOY] > 0, 1, 0)

➤ YOY Sales Colour:

YOY Sales Colour (blue/orange) =

--Defines the hex codes used in conditional formatting

VAR Blue = "#689CCA"

VAR Orange = "#F59C4E"

RETURN

IF ([Total Sales YOY] > 0, Blue, Orange)

5. Create a measure that returns one colour when YOY sales are positive and another colour when YOY sales are negative. I used the following hex codes:

- #689CCA for the blue
- #F59C4E for the orange

6. Create four visuals:

- Current Year Sales
- YOY Sales Indicator
- Current Year Sales by Category (I used the Bullet Chart by OKVIZ)
- Current vs. Prior Year Sales by Month (I used the Bullet Chart by OKVIZ)

7. Configure conditional formatting on the YOY Sales Indicator, Sales by Category, and Sales by Month visuals.

8. Add a filter for region
9. Add a custom legend using text boxes and shapes.

Dataset

This challenge uses the Superstore dataset provided on <https://data.world/nerdywithdata/sample-superstore>