


# PRO TIP: Rolling Calendars <Doc 000036X-Day 00006Y BI>

Monday, July 31, 2023 4:19 PM

07.19.2023

? What if you Built a Report with Data Calendar you want to Refresh (it's not fixed)

 We can use M Code to create a calendar based on the Current Point in Time

At the Top of the Report View Inside the Home Option Click the Transform data Option

Click the Transform data Option in the Menu that just appeared

In the Power Query Editor Box Inside the Home Option Click the New Source Option is used to bring up the Get Data Menu

Click the Blank Query Option

Name the New Query: Rolling Calendar

In the Formula Bar type the Literal `=#date(2020,1,1)` {Format YYYY,MM,DD}

Click the fx Icon

Inside Power Query's Applied Steps Section Custom 1 Should Appear

Click the Custom 1 Step

In the Formular Bar Delete Everything

In the Formular Bar Type `= List.Dates(  
Source,  
Number.From(DateTime.LocalNow()) - Number.From(Source),  
#duration(1,0,0,0)  
)`

In the Power Query Editor Box Inside the File Option Click the To Table Convert Option

The To Table Box Pops Up

Select or enter delimiter Drop Down: None

How to handle extra columns Drop Down: Show as errors

Click the Green Rectangular Ok Button

Click the Column 1 Header Data Type Icon

Click the Date Option

Click the Column 1 Header

Rename Column 1 to Date

You can add Calculated Date Columns (year, month, quarter, etc.) using tools in the Add Column Option

## Create a Rolling Calendar

In the Power Query Editor Box Inside the Home Option Click the New Source Option is used to bring up the Get Data Menu

Click the Blank Query Option

Name the New Query Rolling Calendar

In the Formula Bar Type `= #date(2023,1,1)`

Press the Enter Key on your Keyboard

A Single Value for January First, 2023 is Created as 1/1/2023

Click the fx Icon

Inside Power Query's Applied Steps Section Custom 1 Should Appear

The Formula Bar says = Source

In the Formula Bar Delete = Source

In the Formula Bar Type = List.Dates(  
Source,  
Number.From(DateTime.LocalNow()) - Number.From(Source),  
#duration(1,0,0,0)  
)

This Calculates the Current Date and Compare it against the Literal we just created, which is our starting date and creates a list of all individual values where the duration is one day

Press the Enter Key on your Keyboard

The Power Query Editor Generates a List Column with Dates

If you return later and refresh this query all of the new dates will be added to the end of this list

### ★ M Code is Case Sensitive

In the Power Query Editor Box Inside the Add Column Option Click the Date Option

Hover over the Year Option

Click the Year Option

In the Power Query Editor Box Inside the Add Column Option Click the Date Option

Hover over the Quarter Option

Click the Start of Quarter Option

In the Power Query Editor Box Inside the Add Column Option Click the Date Option

Hover over the Month Option

Click the Start of Month Option