

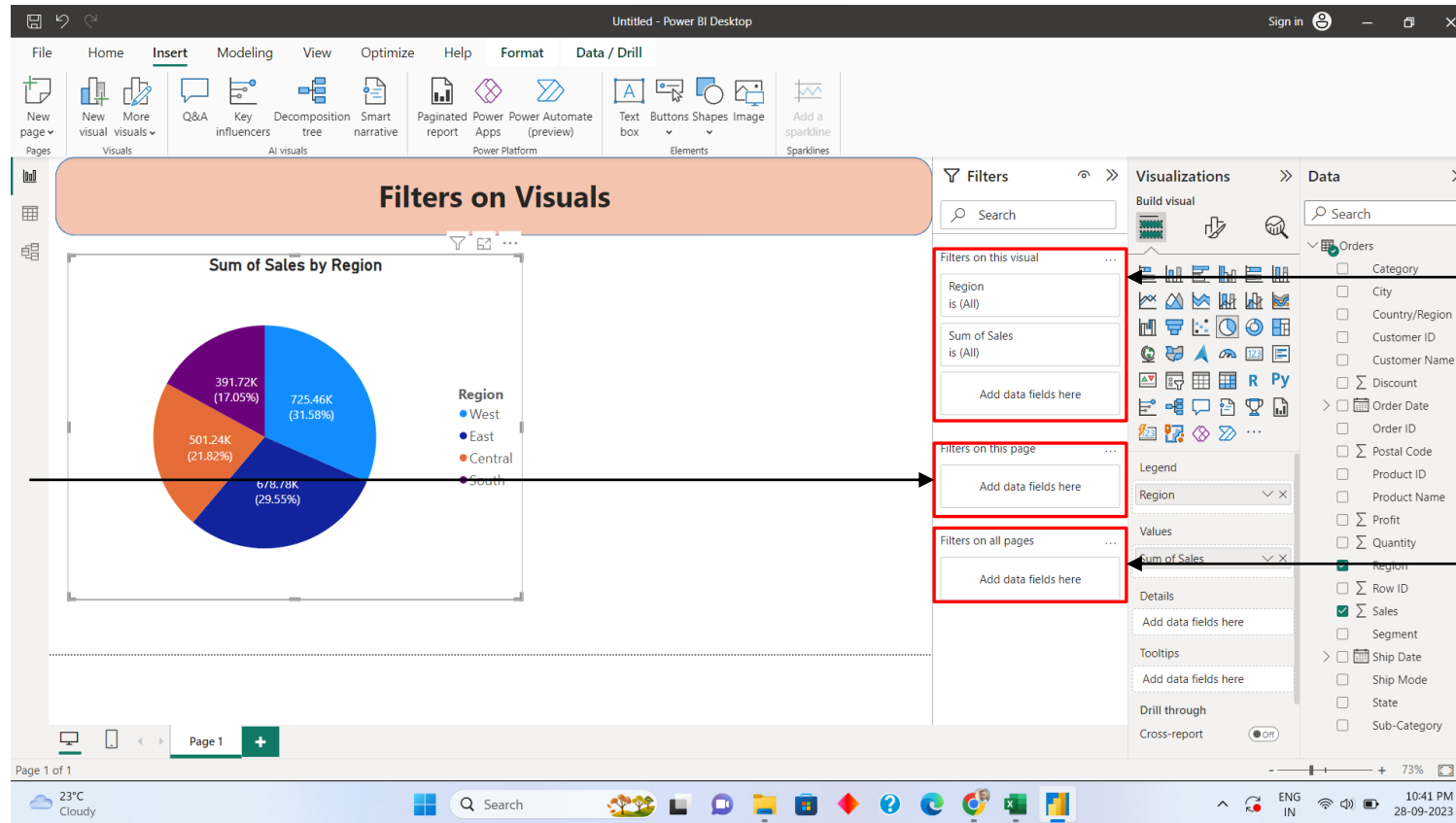
Filters and Drillthrough

UTKARSH GAIKWAD

What is Data Filtering?

- Data filtering is the process of examining a dataset to exclude, rearrange, or apportion data according to certain criteria.
- For example, data filtering may involve finding out the total number of sales per quarter and excluding records from last month.
- Example 2 finding out sales of specific State only

Different Filter types in Power BI



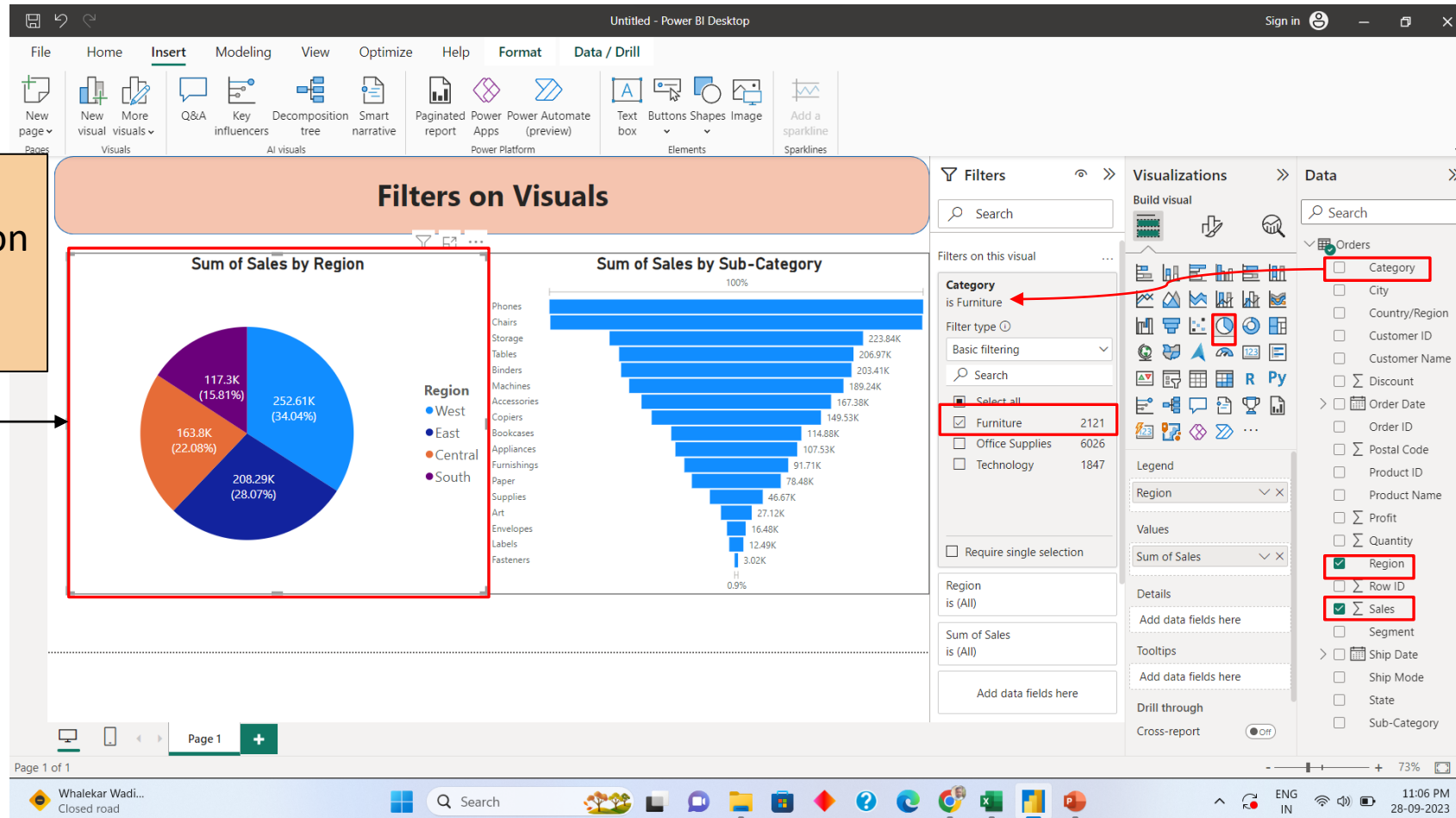
2. Applies Filter on Selected Page

1. Filters on this Visual Applies Filter on Selected Visual only

3. Filters on all pages Apply filter on all the pages

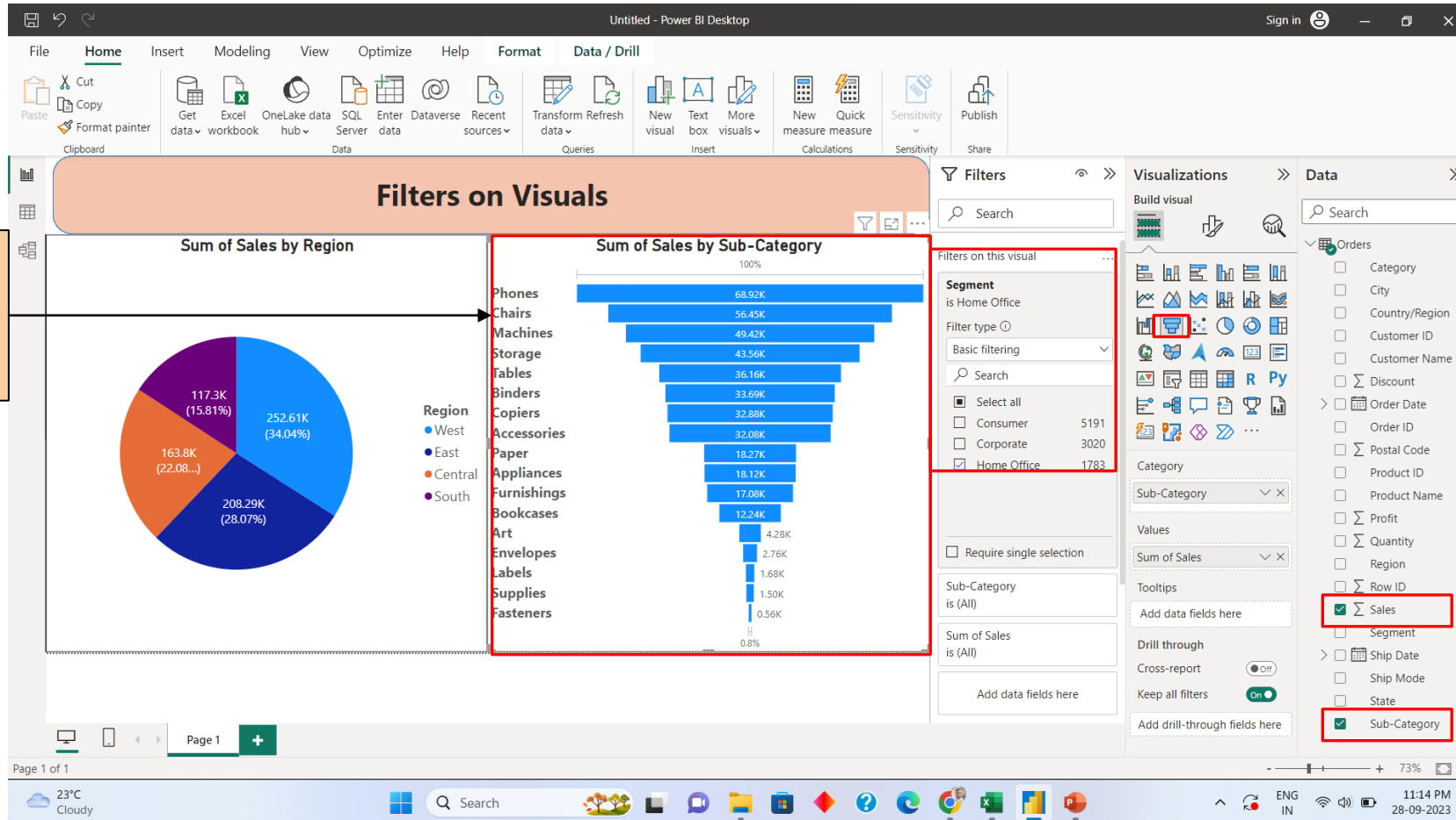
1. Filter on Visuals (Basic Filtering)

All filters
Will be applied on
This selected
visual only



1. Filter on Visuals continued

Segment filter
Applied on this
Visual only



2. Filter on this page – Changes filter on entire page

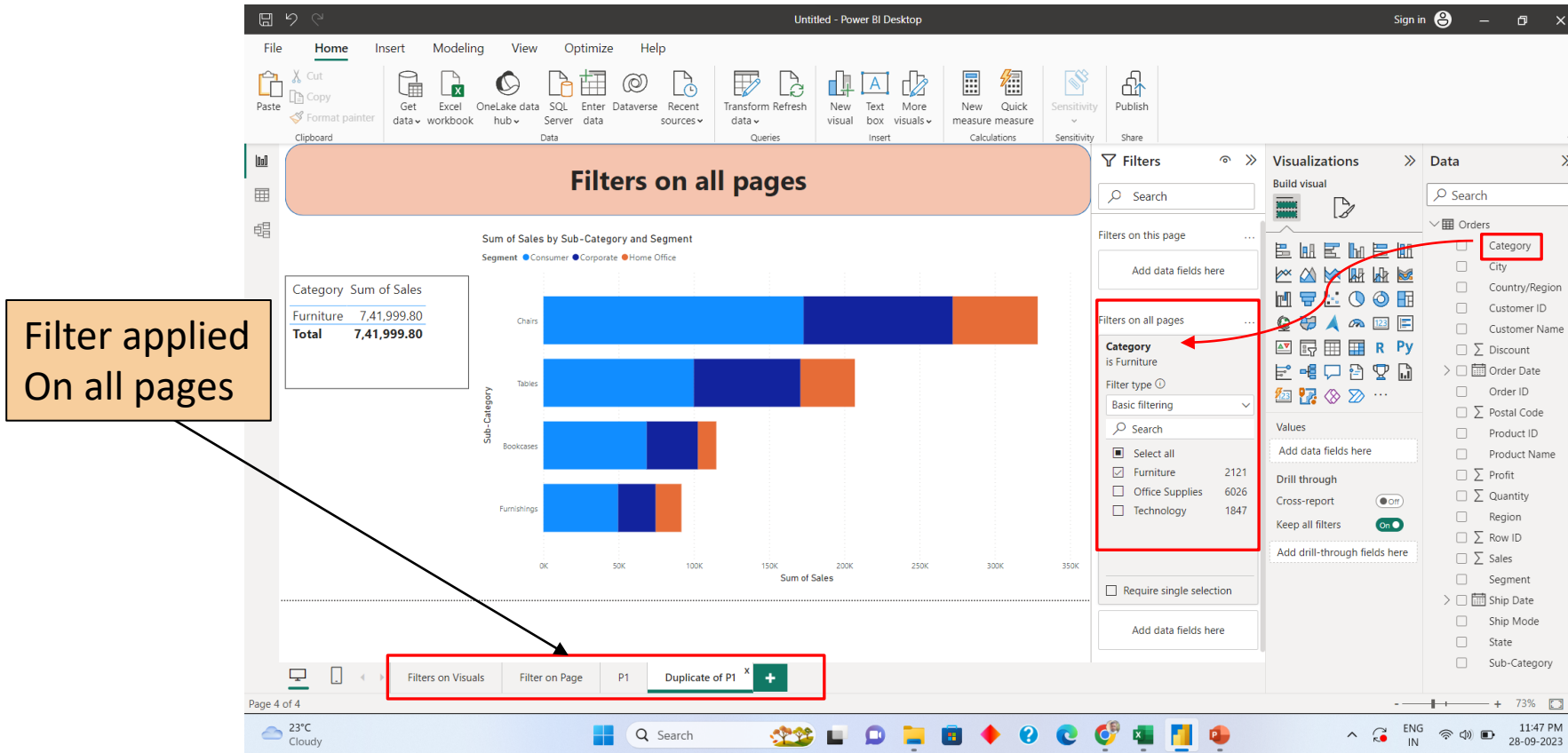
The screenshot shows the Power BI Desktop interface with the 'Filters on this page' panel open. A red box highlights the 'Category' filter, which is currently set to 'is Furniture or Office ...'. The main view displays three visualizations:

- Sum of Profit by Region** (Pie Chart):
 - West: 44.06K (31.26%)
 - East: 26.76K (18.98%)
 - South: 6.01K (4.26%)
 - Central: 64.11K (45.49%)
- Sum of Sales** (Table):

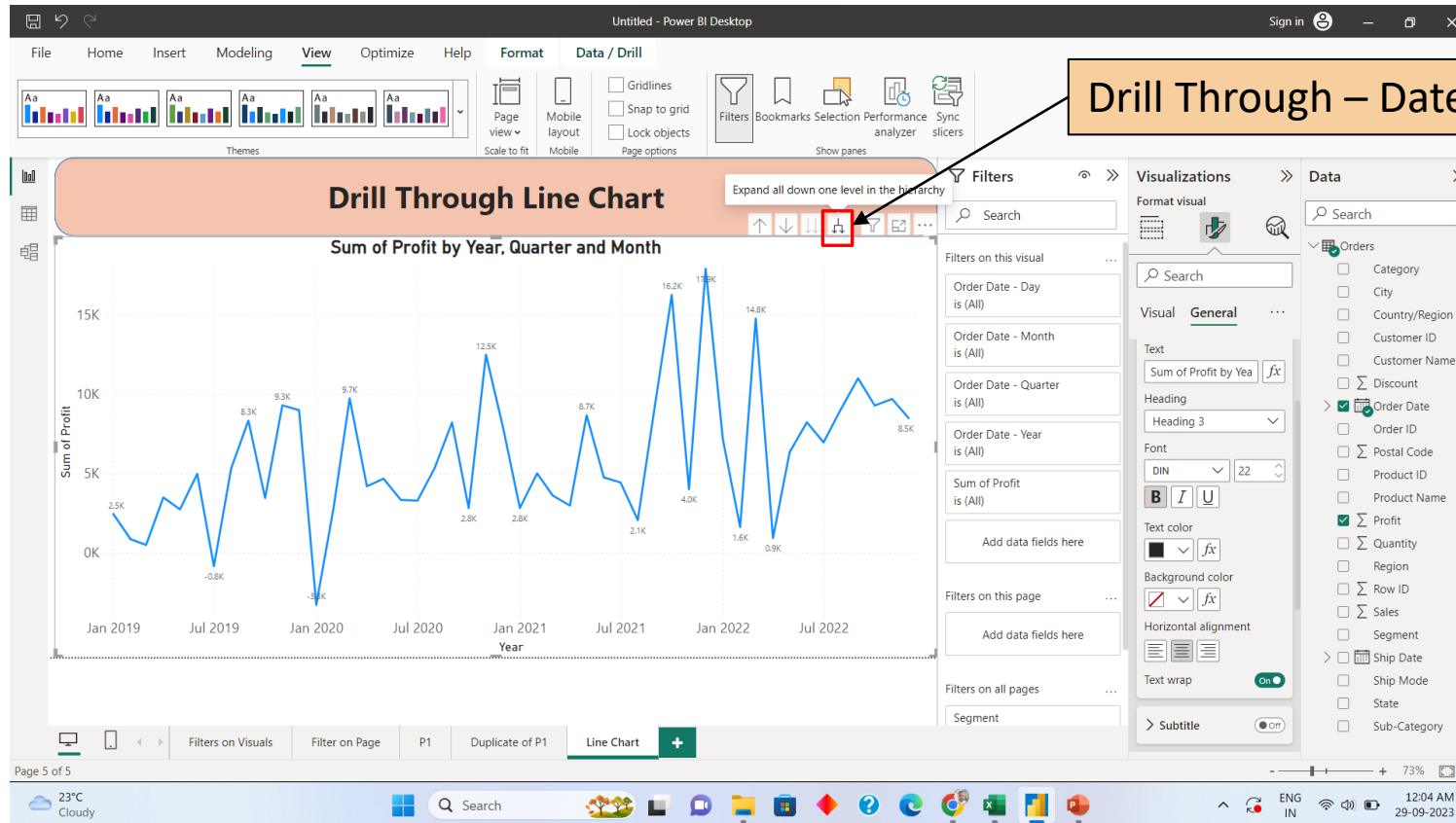
Segment	Sum of Sales
Home Office	2,46,349.13
Corporate	4,59,696.25
Consumer	7,55,001.45
Total	14,61,046.83
- Sum of Profit by Category and Region** (Treemap):
 - Office Supplies
 - Furniture
 - West
 - East
 - South
 - Ce...

The 'Filters on this page' panel shows the 'Category' filter with a red box around it. The 'Filter type' is set to 'Basic filtering'. The 'Values' section shows 'Furniture' (2121), 'Office Supplies' (6026), and 'Technology' (1847). The 'Filters on all pages' panel is also visible at the bottom.

3. Filter on all pages

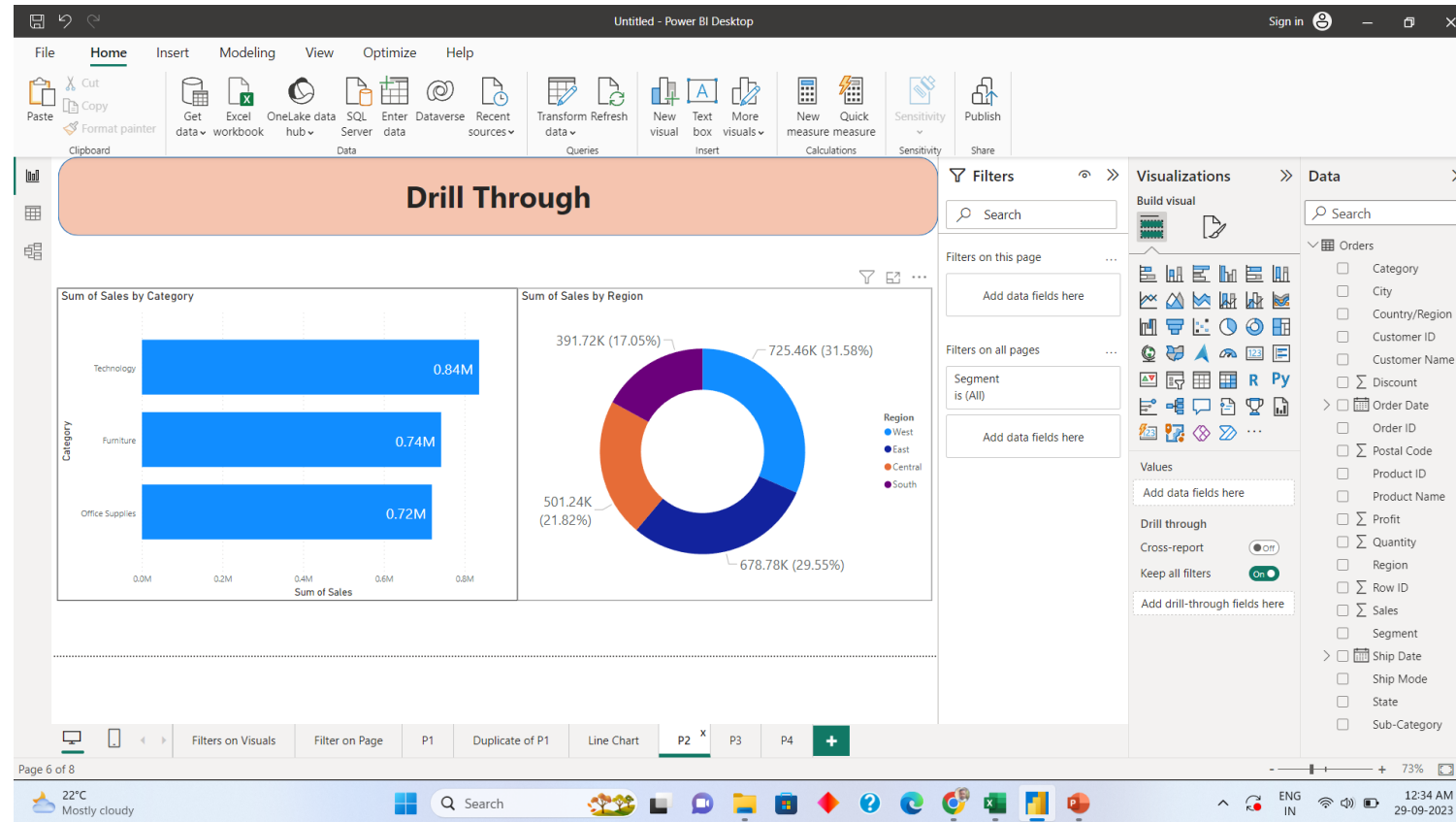


Drill Through – Line Chart



- Date Hierarchy
1. Year
 2. Quarter
 3. Month
 4. Day

Drill Through for tables



Drill Through for tables - Continued

The screenshot displays the Microsoft Power BI Desktop interface. The main workspace shows three tables: 'Sub-Category Sum of Sales', 'Year Sum of Sales', and 'Segment Sum of Sales'. The 'Sub-Category Sum of Sales' table lists various product categories and their sales. The 'Year Sum of Sales' table shows sales data for the years 2020, 2021, and 2022. The 'Segment Sum of Sales' table shows sales data for different segments: Consumer, Corporate, and Home Office. The 'Visualizations' pane on the right shows the 'Build visual' dropdown menu. A red box highlights the 'Drill through' section, which is currently set to 'Off'. A red arrow points from the 'Drill through' section to the 'Category' field in the 'Data' pane, which is also highlighted with a red box. The 'Data' pane shows a list of fields, including 'Category', 'City', 'Country/Region', 'Customer ID', 'Customer Name', 'Discount', 'Order Date', 'Order ID', 'Postal Code', 'Product ID', 'Product Name', 'Profit', 'Quantity', 'Region', 'Row ID', 'Sales', 'Segment', 'Ship Date', 'Ship Mode', 'State', and 'Sub-Category'. The 'Category' field is selected, and its drill-through options are shown in a dropdown menu. The dropdown menu includes 'Category is (All)', 'Allow drill through when:', 'Used as category', and a search bar. Below the search bar, there are three items: 'Furniture 2121', 'Office Supplies 6026', and 'Technology 1847'. The 'Furniture' item is selected, and a red box highlights it. The 'Filters' pane on the left shows the 'Segment' field selected as a filter. The 'Visualizations' pane on the right shows the 'Build visual' dropdown menu. The 'Data' pane on the right shows the 'Category' field selected. The 'Drill through' section in the 'Visualizations' pane is highlighted with a red box. A red arrow points from the 'Drill through' section to the 'Category' field in the 'Data' pane, which is also highlighted with a red box. The 'Data' pane shows a list of fields, including 'Category', 'City', 'Country/Region', 'Customer ID', 'Customer Name', 'Discount', 'Order Date', 'Order ID', 'Postal Code', 'Product ID', 'Product Name', 'Profit', 'Quantity', 'Region', 'Row ID', 'Sales', 'Segment', 'Ship Date', 'Ship Mode', 'State', and 'Sub-Category'. The 'Category' field is selected, and its drill-through options are shown in a dropdown menu. The dropdown menu includes 'Category is (All)', 'Allow drill through when:', 'Used as category', and a search bar. Below the search bar, there are three items: 'Furniture 2121', 'Office Supplies 6026', and 'Technology 1847'. The 'Furniture' item is selected, and a red box highlights it.

Sub-Category	Sum of Sales
Phones	3,30,007.05
Chairs	3,28,449.10
Storage	2,23,843.61
Tables	2,06,965.53
Binders	2,03,412.73
Machines	1,89,238.63
Accessories	1,67,380.32
Copiers	1,49,528.03
Bookcases	1,14,880.00
Appliances	1,07,532.16
Furnishings	91,705.16
Paper	78,479.21
Supplies	46,673.54
Art	27,118.79
Envelopes	16,476.40
Labels	12,486.31
Fasteners	3,024.28
Total	22,97,200.86

Year	Sum of Sales
2022	7,33,215.26
2021	6,09,205.60
2019	4,84,247.50
2020	4,70,532.51
Total	22,97,200.86

Segment	Sum of Sales
Consumer	11,61,401.35
Corporate	7,06,146.37
Home Office	4,29,653.15
Total	22,97,200.86

Visualizations pane details:

- Build visual: [Dropdown]
- Filters on this page: [Add data fields here]
- Filters on all pages: [Segment is (All)]
- Values: [Add data fields here]
- Drill through: [Off]
- Cross-report: [Off]
- Keep all filters: [On]
- Category is (All)
- Allow drill through when: [Used as category]
- Search: [Search]
- Furniture 2121
- Office Supplies 6026
- Technology 1847

Drill Through for tables - Continued

The screenshot displays the Power BI Desktop interface. On the left, two tables are shown side-by-side, both with 'Sum of Sales' as the measure.

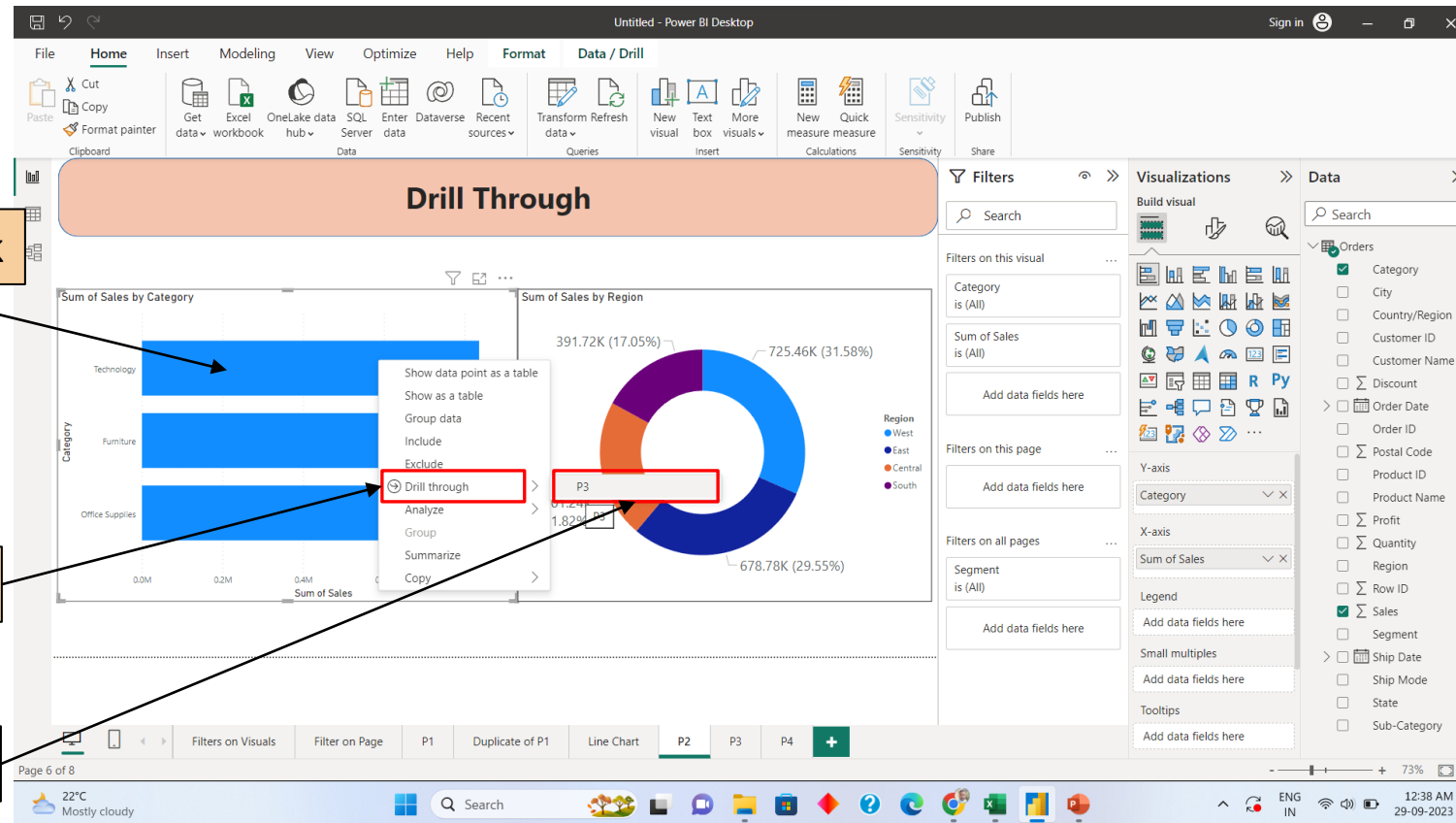
Customer Name	Sum of Sales
Sean Miller	25,043.05
Tamara Chand	19,052.22
Raymond Buch	15,117.34
Tom Ashbrook	14,595.62
Adrian Barton	14,473.57
Ken Lonsdale	14,175.23
Sanjit Chand	14,142.33
Hunter Lopez	12,873.30
Sanjit Engle	12,209.44
Christopher Conant	12,129.07
Todd Sumrall	11,891.75
Greg Tran	11,820.12
Becky Martin	11,789.63
Seth Vernon	11,470.95
Caroline Jumper	11,164.97
Clay Ludtke	10,880.55
Maria Etezadi	10,663.73
Total	22,97,200.86

City	Sum of Sales
New York City	2,56,368.16
Los Angeles	1,75,851.34
Seattle	1,19,540.74
San Francisco	1,12,669.09
Philadelphia	1,09,077.01
Houston	64,504.76
Chicago	48,539.54
San Diego	47,521.03
Jacksonville	44,713.18
Springfield	43,054.34
Detroit	42,446.94
Columbus	38,706.24
Newark	28,576.12
Columbia	25,283.32
Lafayette	25,036.20
Jackson	24,963.86
San Antonio	21,843.53
Total	22,97,200.86

On the right, the 'Visualizations' pane is open, showing the 'Drill through' settings for the selected visual. The 'Region' field is highlighted with a red box. The 'Drill through' section shows 'Region' as the selected field, with a red circle around the 'Region' checkbox. The 'Cross-report' and 'Keep all filters' options are also visible.

Region is (All)
Allow drill through when:
Used as category
Search
Central 2323
East 2848
South 1620

Applying Drill Through



Step 1 : Right click

Step 2 : Drill Through

Step 3 : Select Sheet

Thank you

UTKARSH GAIKWAD

PING ME ON SKYPE FOR ANY QUERIES