

MICROSOFT POWER-BI

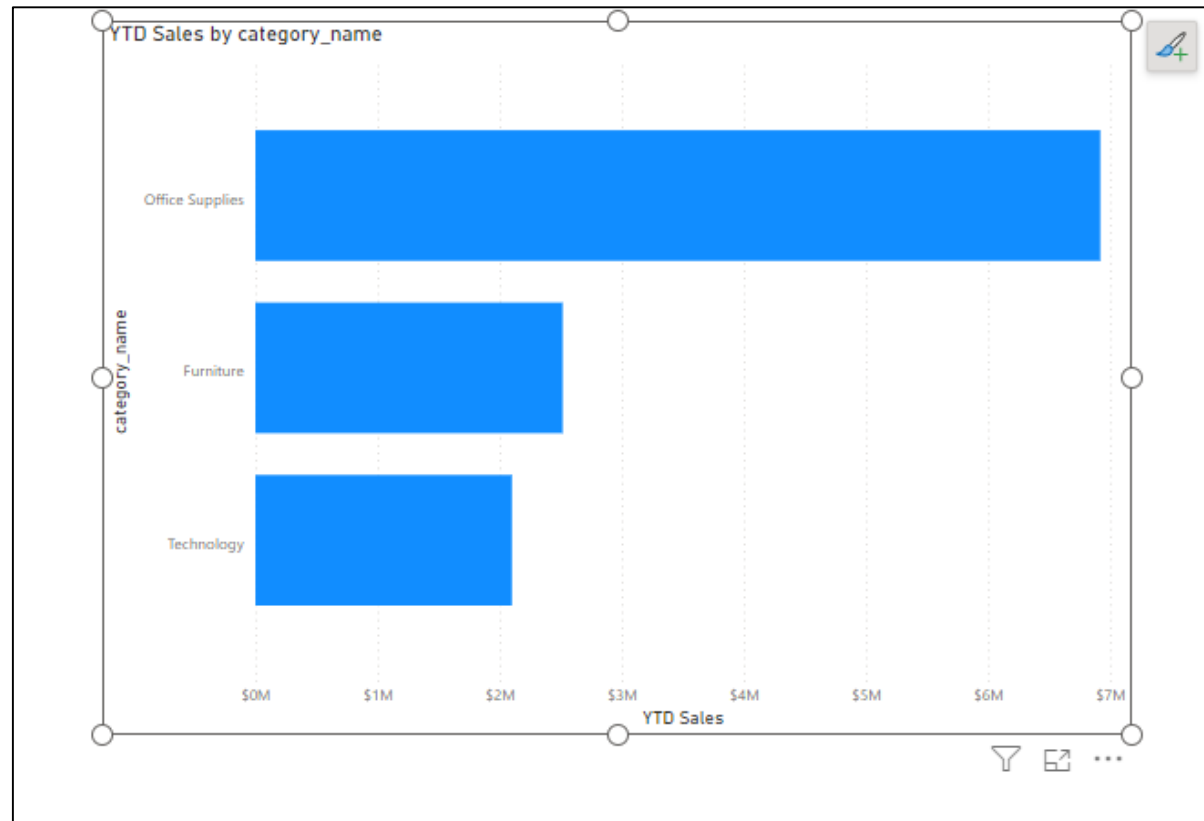
SERIES 7

VISUALIZATION (PART II)

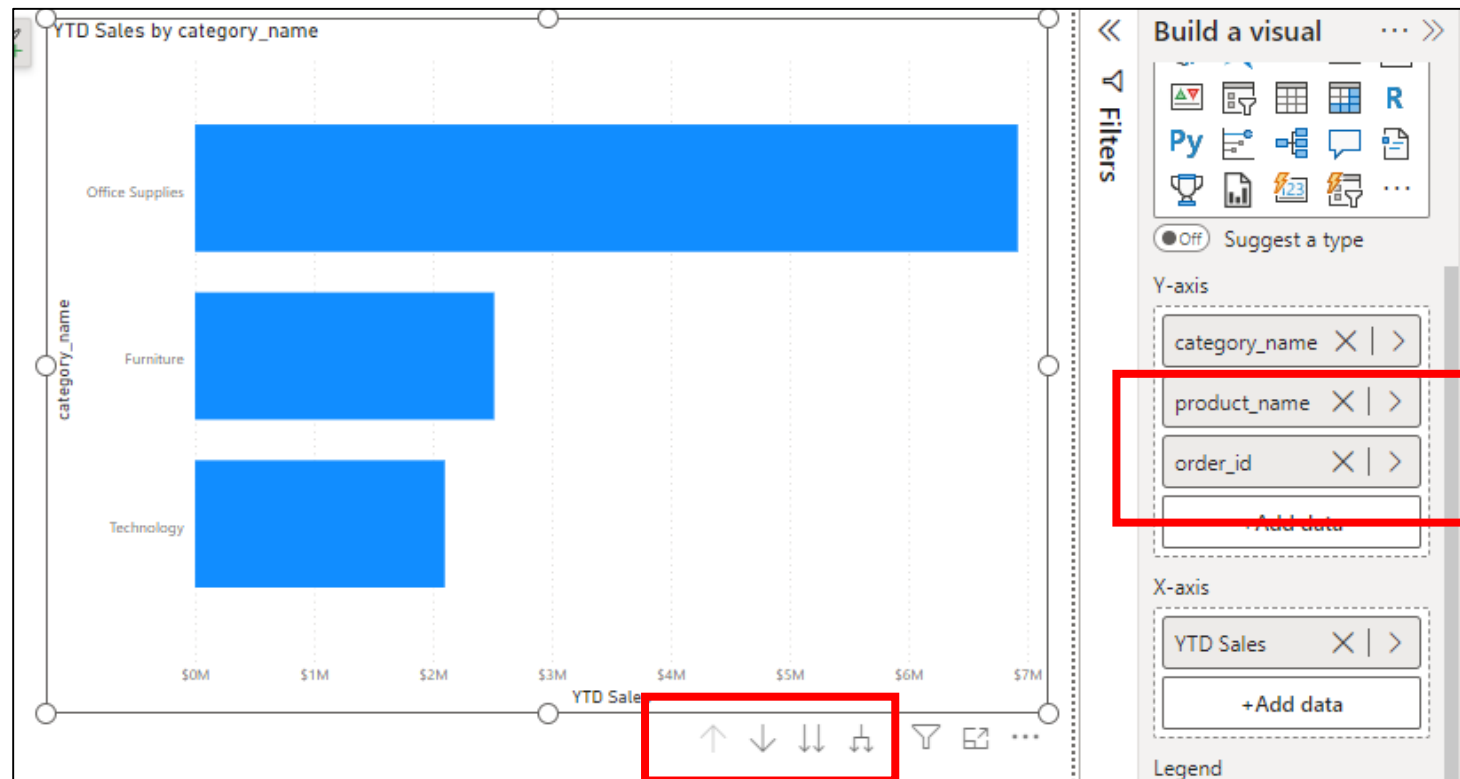
- MAYURI .D.

DRILL DOWN-UP

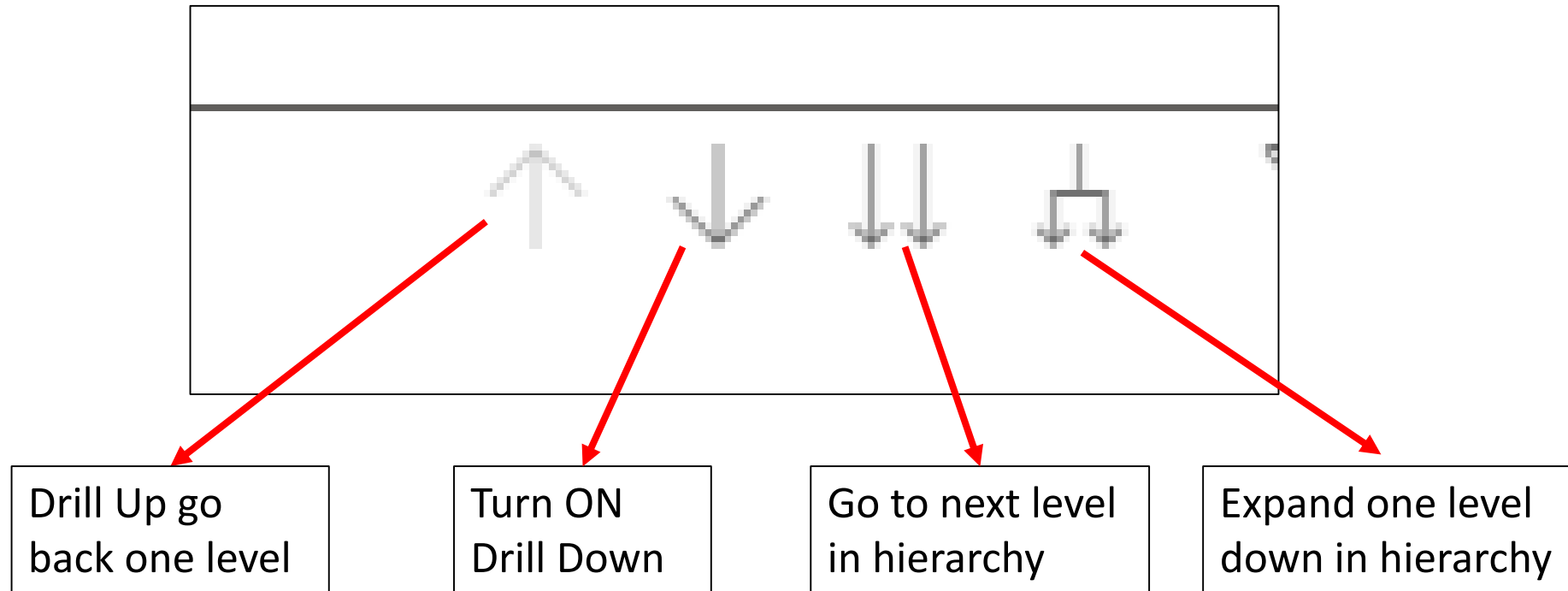
- Drill Down means basically when you click, you go to next level.
- For e.g – bar chart shows results of years, when you click you go to next level i.e. quarter
- Drill Up means going back to the original data. i.e. quarter to years
- We will go through the below chart that has YTD sales vs category name.



- To activate the drill down option, you need to add hierarchy fields like product name, order id.
- You can add 2 fields/ 3 fields, depends on your final result.

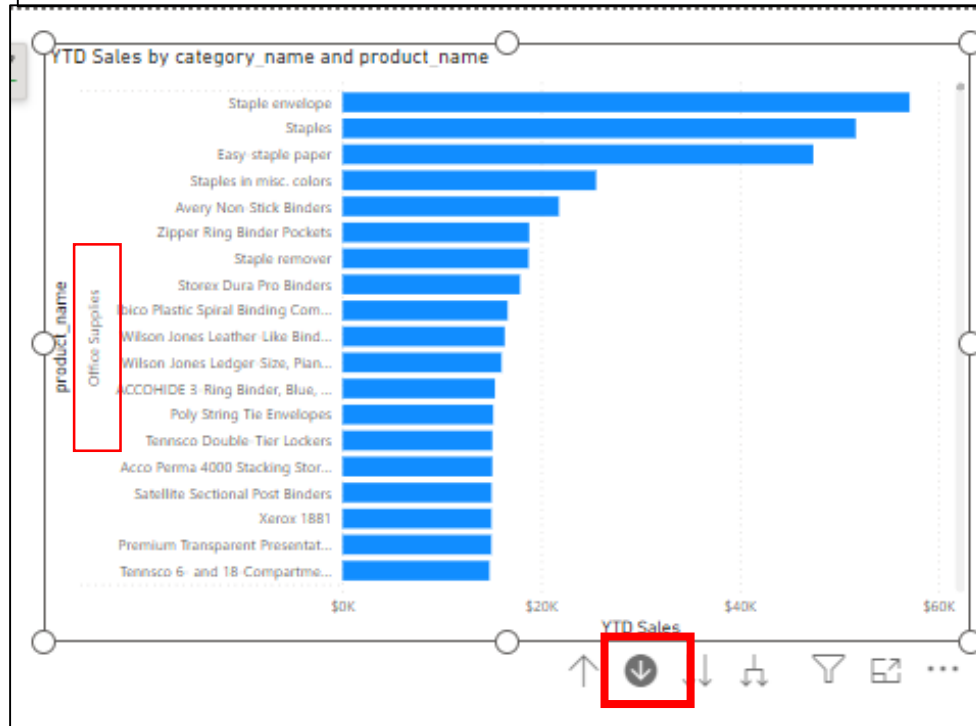


- After adding the hierarchy fields, you get 4 options activated.

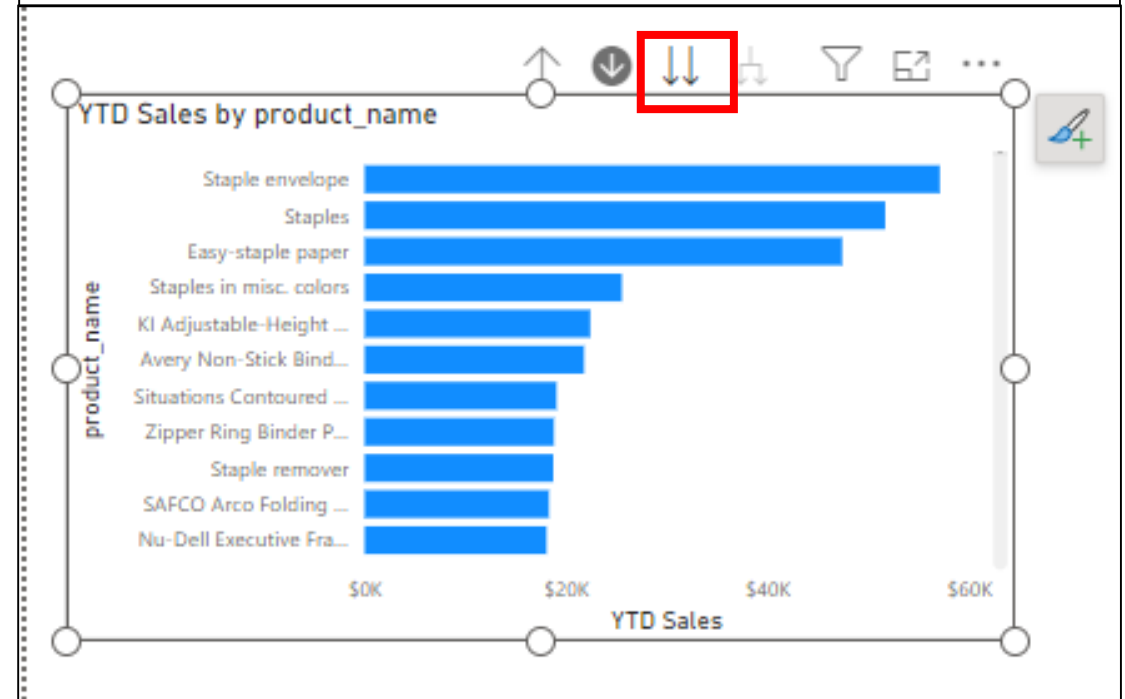


- Before any drill down, first you need to **turn ON** drill down option
- **Understand the difference** in both charts having same output.

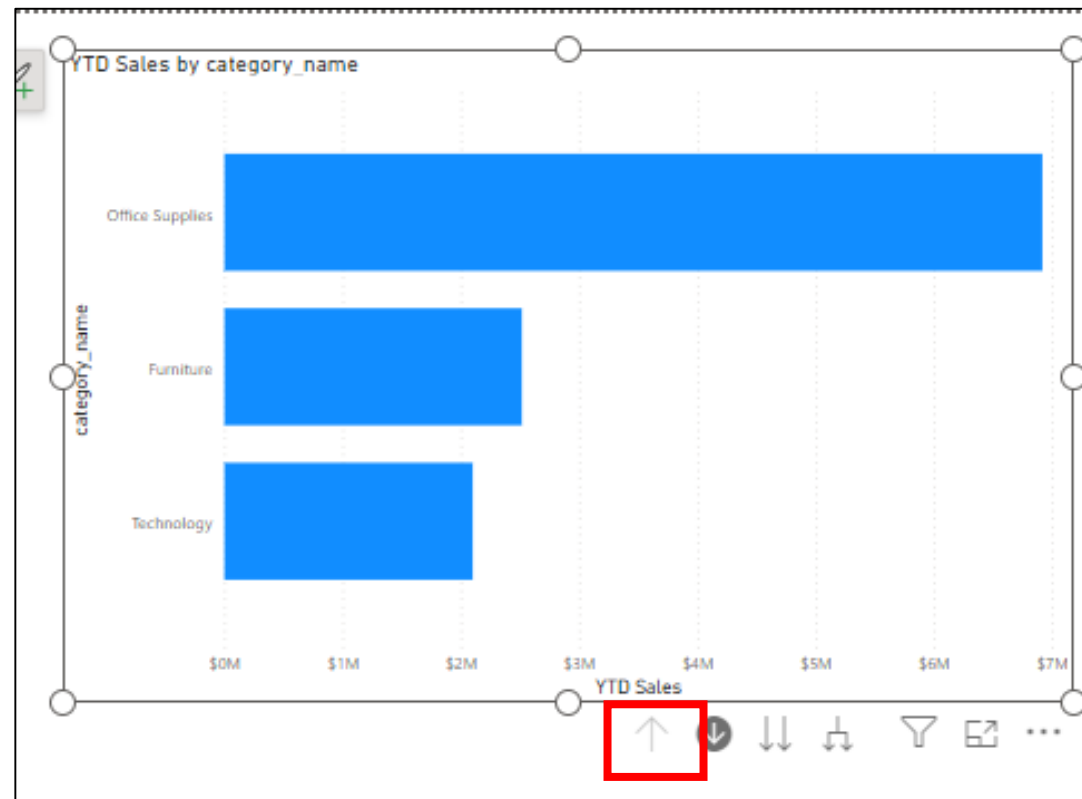
Here, I have click directly on Office Suppliers bar. You can see vertical “office supplier” category is displayed also the change in title of chart



Here, I have click on 3rd option i.e. go to next level hierarchy. Here you can not see vertical category but just “product name” also the change in title of chart

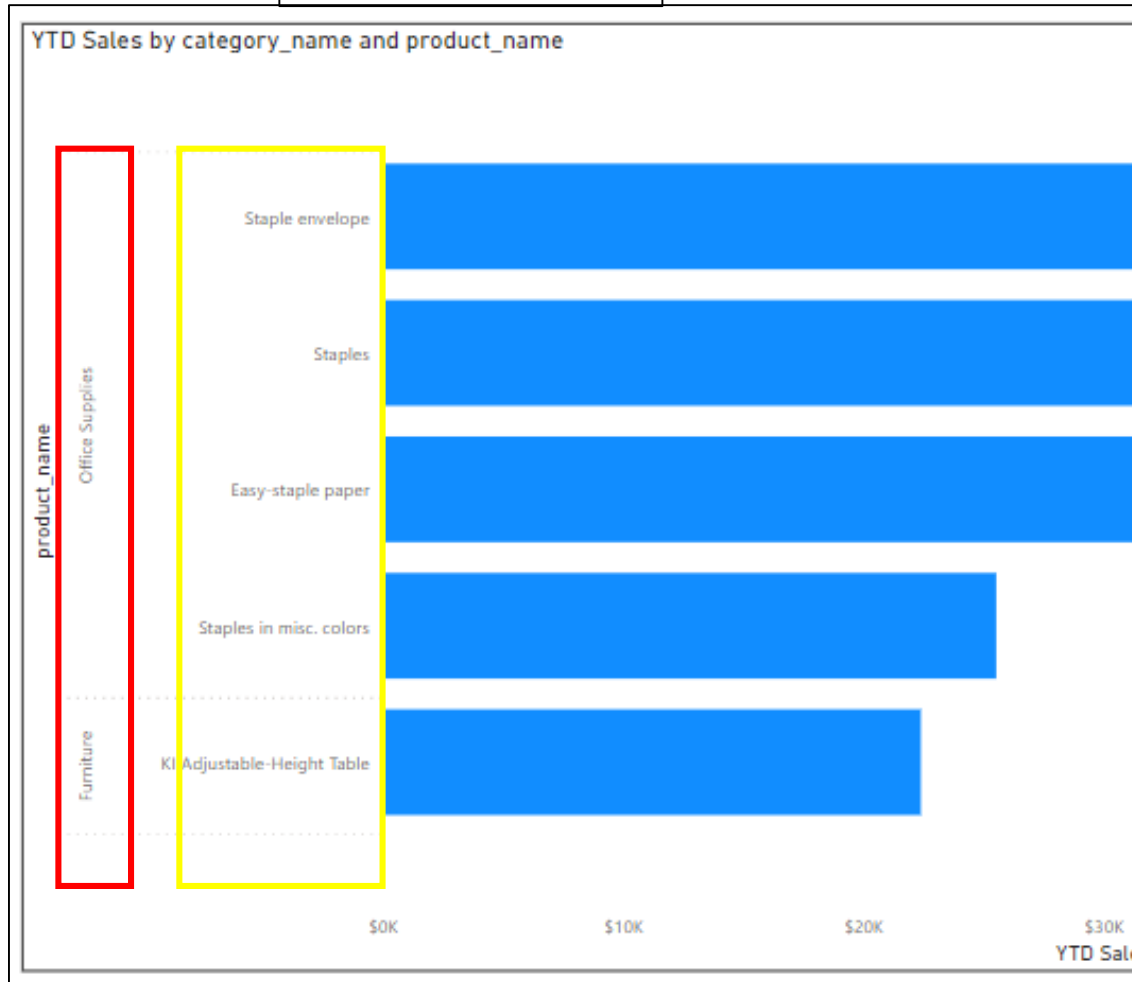


- Drill Up- back to original chart.
- It doesn't go directly to original chart, goes by level.
- This option is one shade lighter in color.

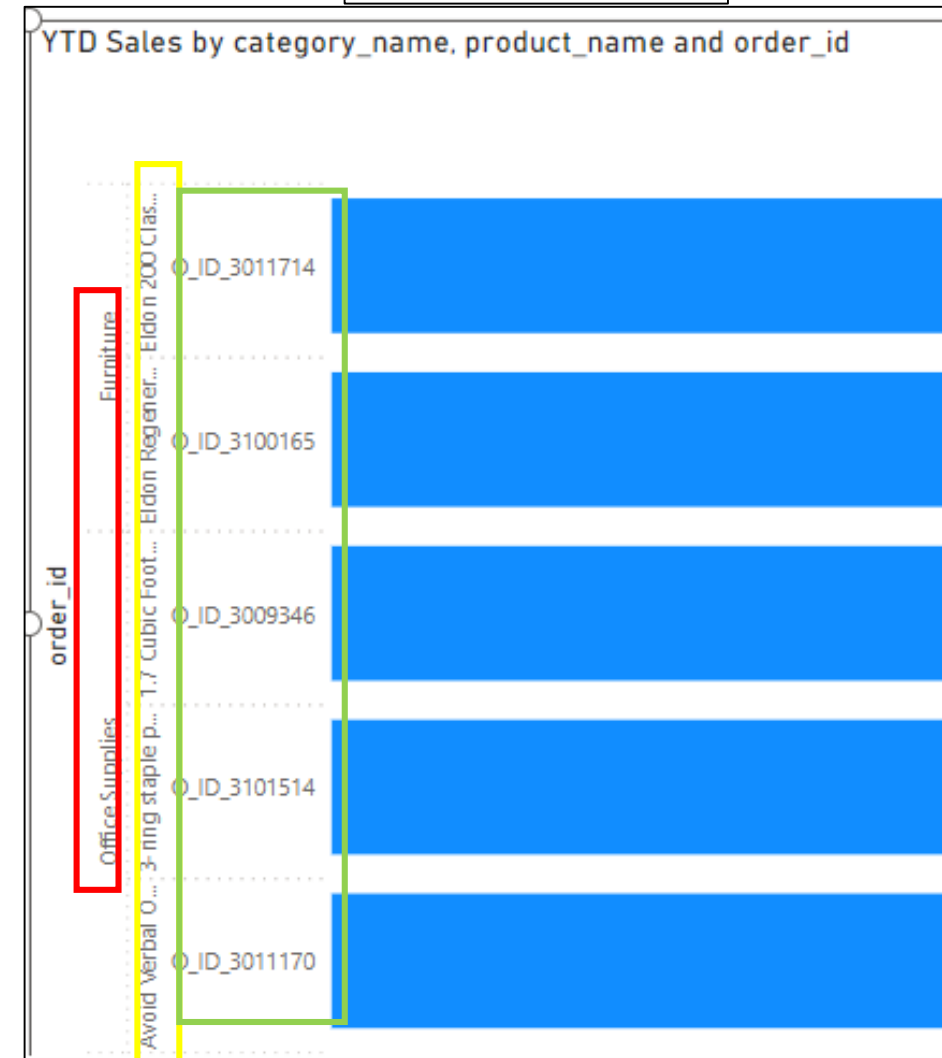


- This is how you will see when you go to 4th option expands hierarchy

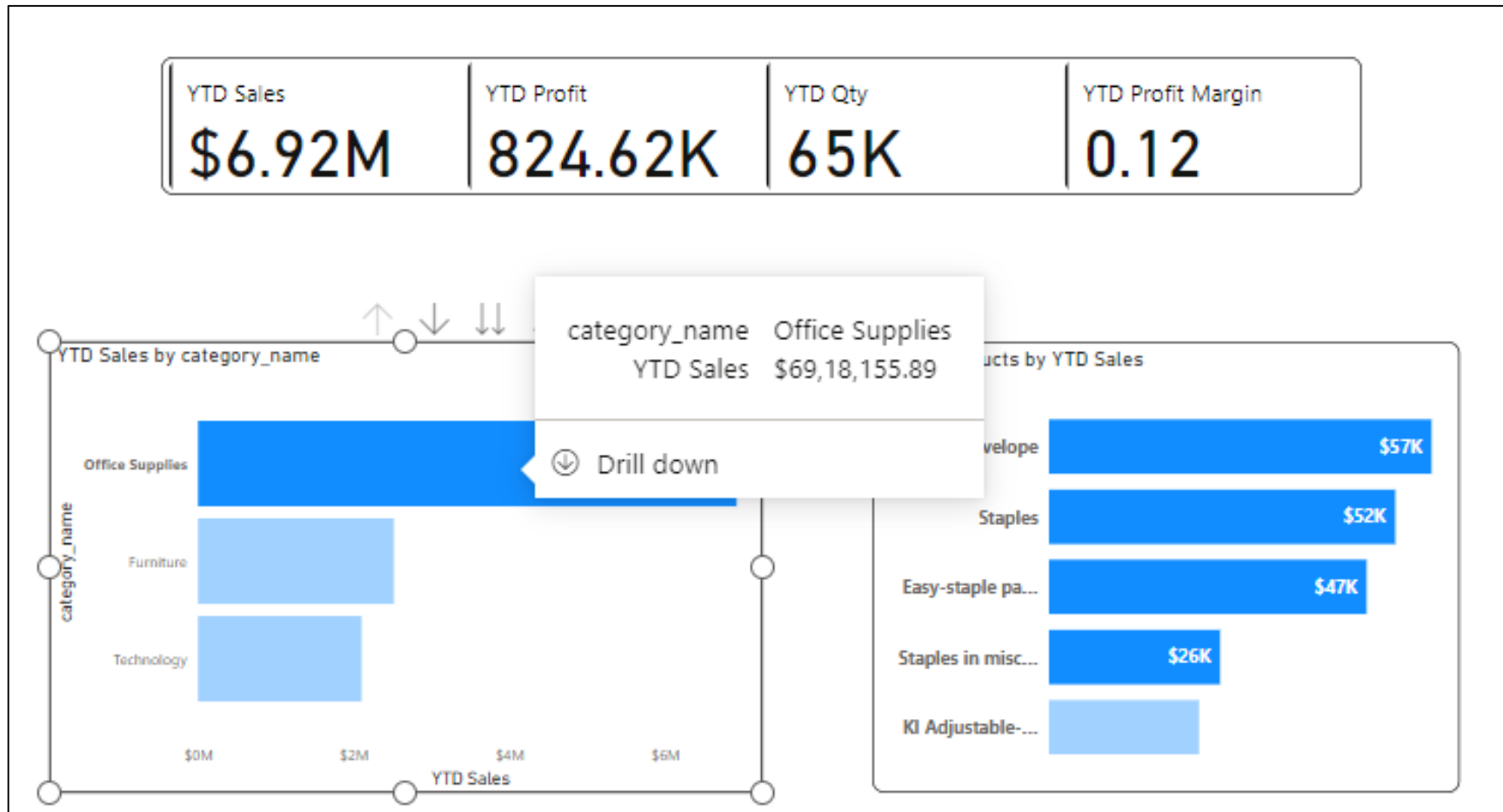
One level down



Two level down



- When you click on any specific category, other charts too gets filter.
- If you don't want other charts to get filtered, change the setting from entire page to only visual.



- Turn ON Drill Down option, go to “interaction” under “format” tab select “selected visual”.
- “selected visual” doesn’t work when Drill Down option is turn OFF, then you can use “Edit Interaction”

The screenshot shows the Microsoft Power BI interface. The 'Format' tab is active, and the 'Data / Drill' sub-tab is selected. A red box highlights the 'Apply drill down filters to' dropdown menu, which is set to 'Selected visual'. Below the menu, the 'Edit interactions' pane is visible, showing a bar chart titled 'YTD Sales by category_name' with categories 'Office Supplies' and 'Furniture'. To the right, a card titled 'Top 5 Products by YTD Sales' displays a list of products and their sales values.

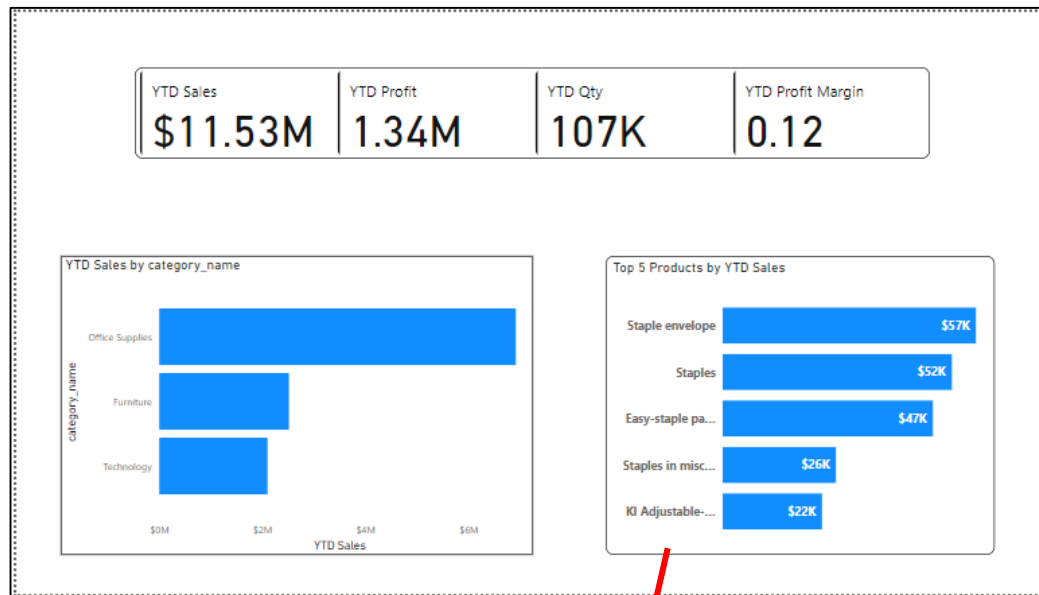
YTD Sales	YTD Profit	YTD Qty	YTD Profit Margin
\$11.53M	1.34M	107K	0.12

Category	YTD Sales
Office Supplies	\$11.53M
Furniture	1.34M

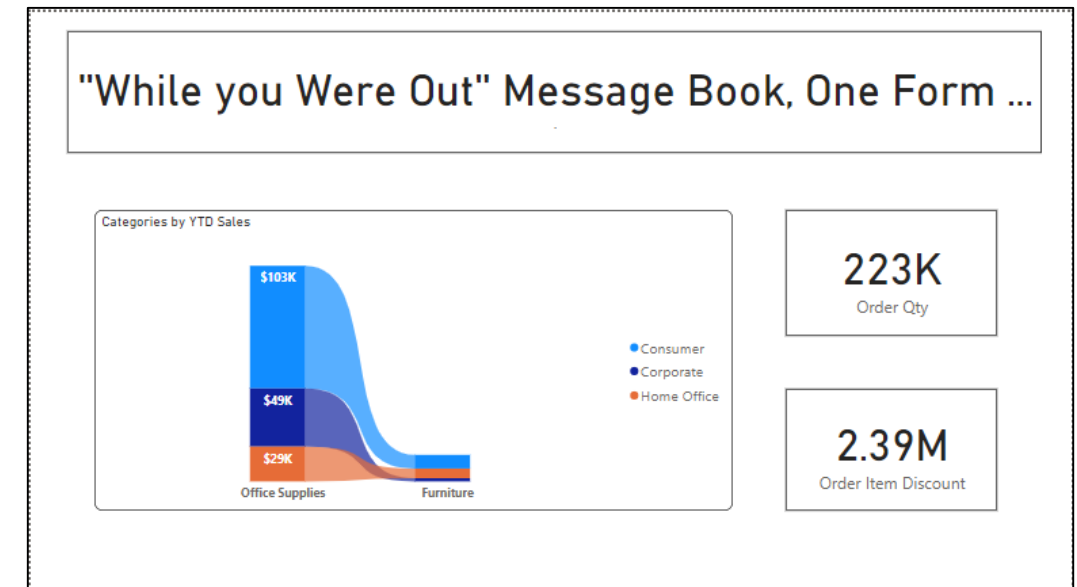
Product	YTD Sales
Staple envelope	\$57K
Staples	\$52K
Easy-staple pa...	\$47K

DRILL THROUGH (Method 1)

With drillthrough in Power BI reports, you can create a destination target page in your report that focuses on a specific entity such as a supplier, customer, or manufacturer. When your report readers right-click a data point in other source report pages, they drill through to the target page to get details that are filtered to that context.



This is main page.
We will use Top 5 products Bar chart



This is Drillthrough target page

Format ... >>

Search

▼ Page information

Name
Drill through target

Page type
Drillthrough ▼

Keep all filters ☒ On

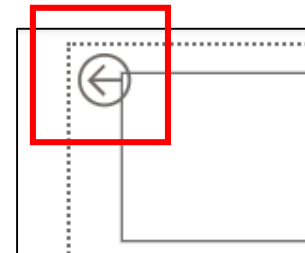
Cross-report ☐ Off

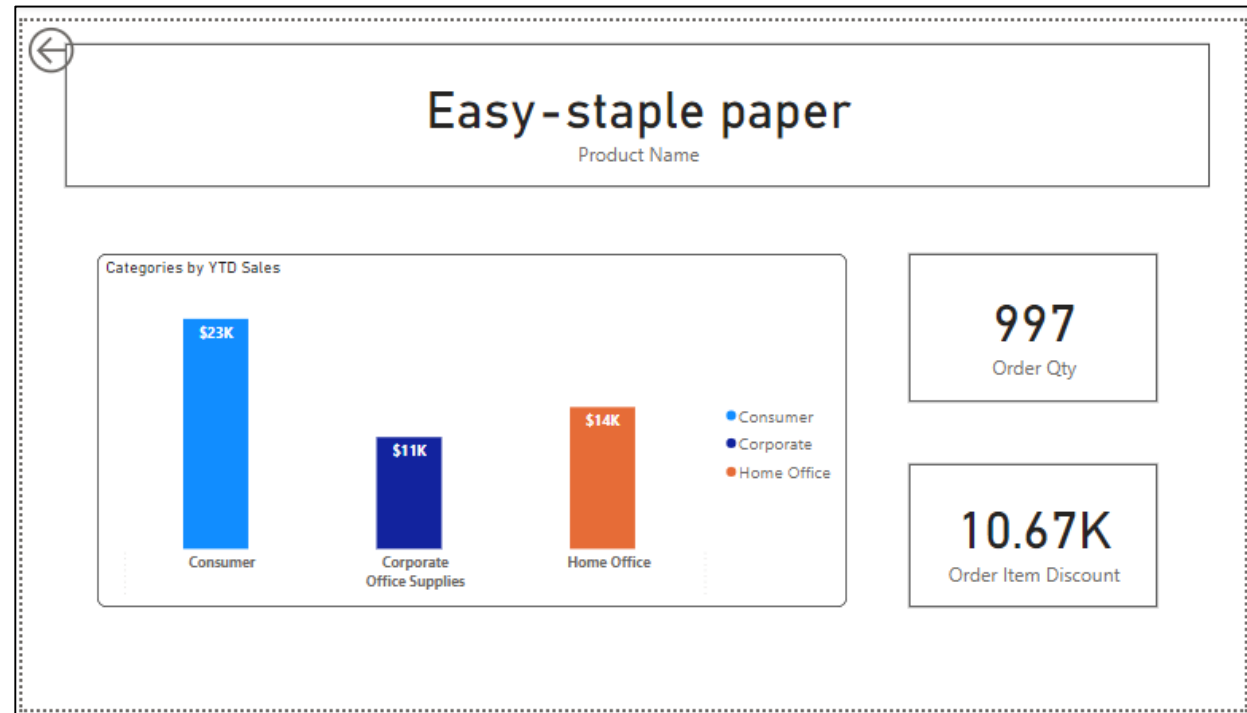
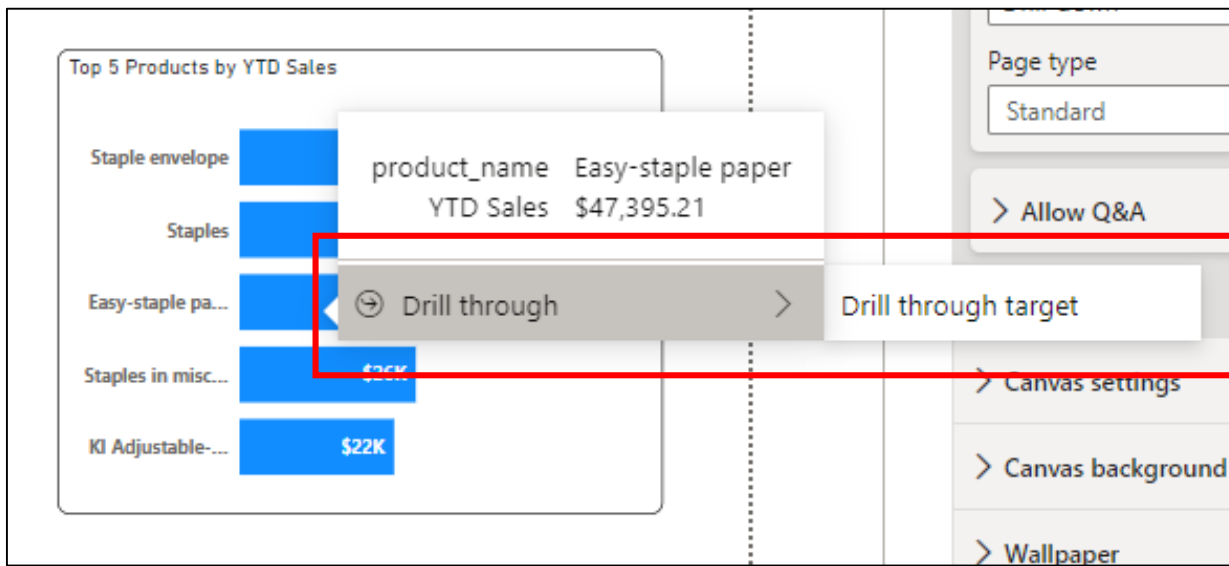
Drill through from
product_name X
+Add data

▼ Drill through when
product_name is
Used as category ▼

> Allow Q&A ☐ Off

- Go to target page click on canvas → format pane → page information → page type = drillthrough → keep all filters ON → drill through from = (field through which you want more details like I want products details so I selected product name) → drill through when = used as category
- You will find a back arrow in top corner on target page





DRILL THROUGH (Method 2)

The screenshot shows a dashboard with a bar chart titled "Top 5 Products by YTD Sales". The chart lists five products with their sales values: Staple envelope (\$57K), Staples (\$52K), Easy-staple pa... (\$47K), Staples in misc... (\$26K), and KI Adjustable-... (\$22K). A red box highlights a "Details" button located at the bottom right of the chart area. To the right of the chart is a "Format" pane with the following settings:

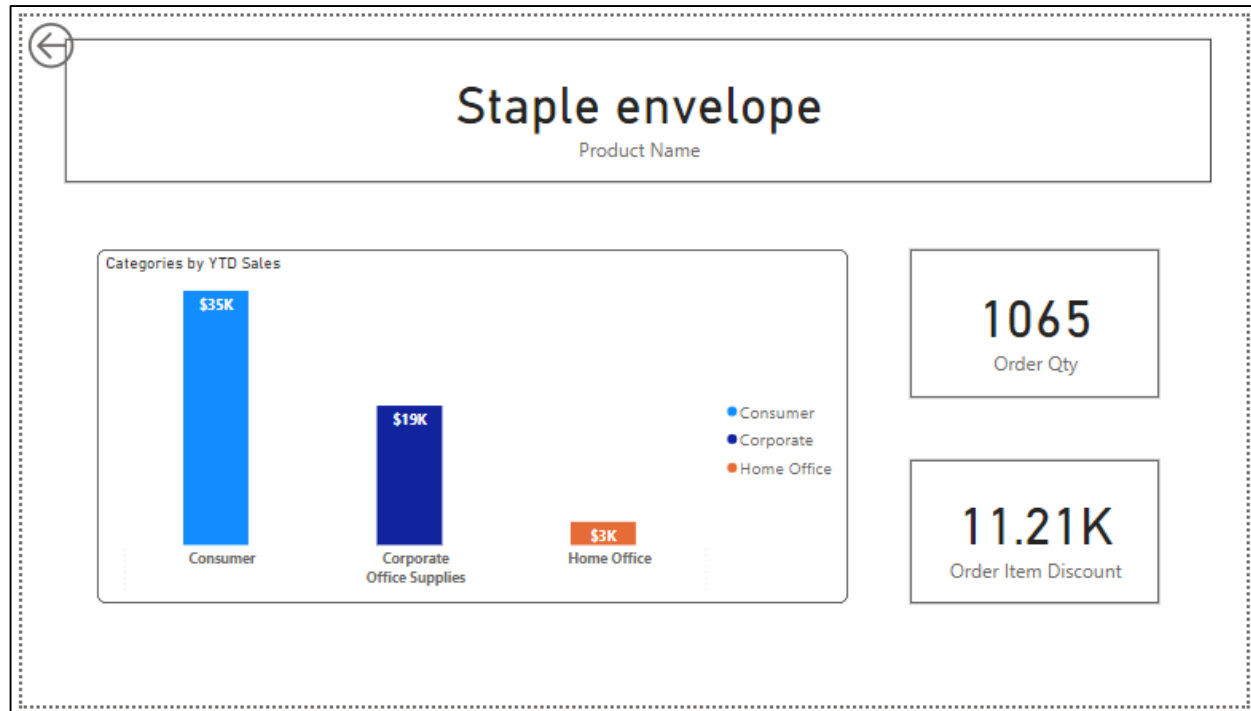
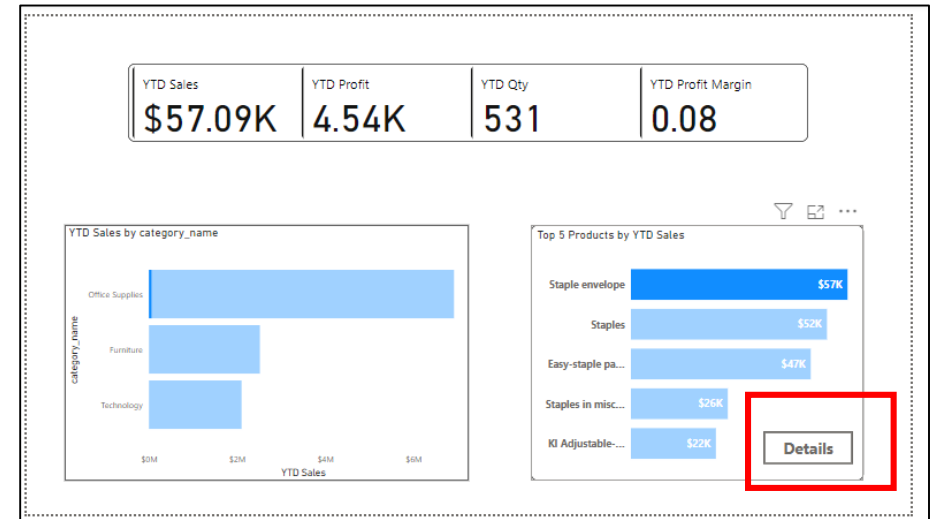
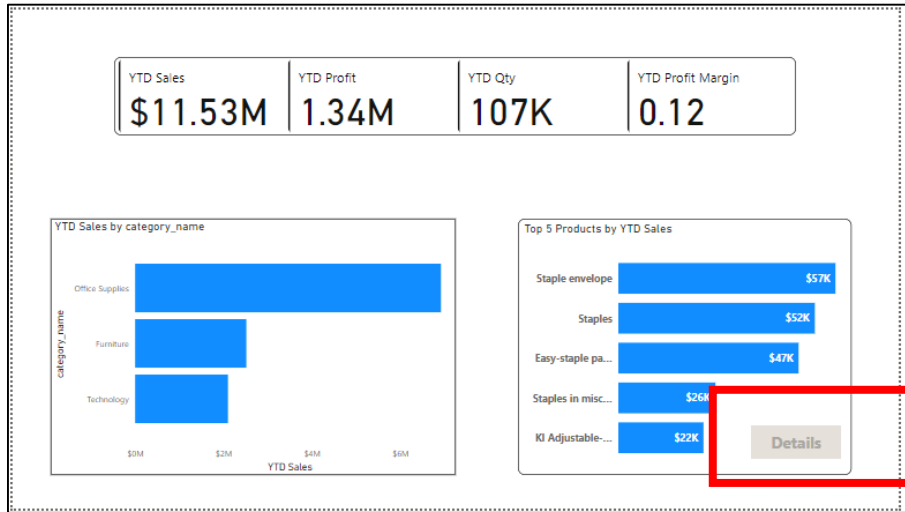
- Format** (Search bar)
- Button** (Properties)
- Action**
 - Type: Drill through
 - Bookmark: None
 - Destination: Drill through target
 - Web URL: (empty)
- Tooltip** (On)
 - Enabled text: (empty)
 - Disabled text: Click for details

Insert → Button → Blank

Format pane → action → type =
drillthrough → destination = (select
target page) → tooltip → disabled
text = click for details

Button style → text → enter your
text and do other formatting

Click on any product bar, button
gets active, click on button, you
are directed to target page.



BOOKMARK

Bookmark enables users to save a particular view of a report page. This ability is extremely useful in enhancing the user experience of navigating a report or opening opportunities to add more depth to a report.

Create table “bookmark”

Home tab → enter data → enter values as shown → name bookmark → load

Create slicer with visual type field
Make it single select in slicer setting option

Create Table

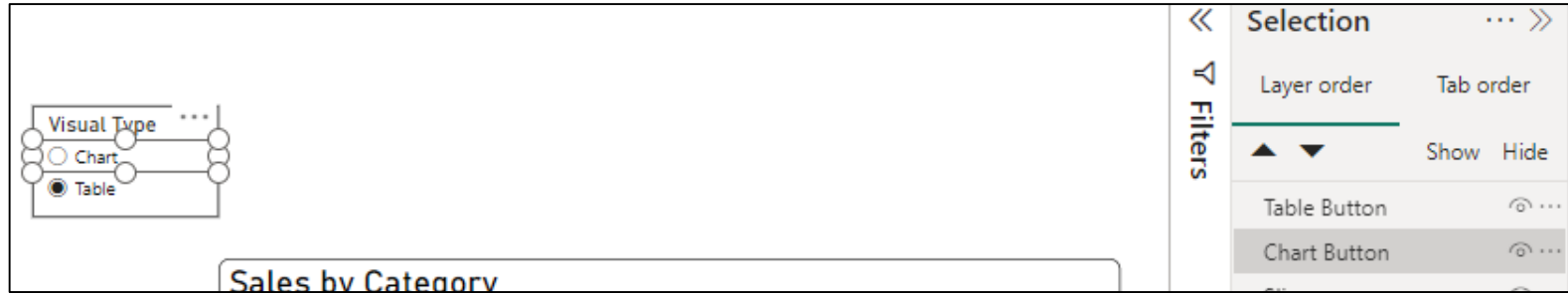
	Visual Type	Sort	+
1	Table	1	
2	Chart	2	
+			

Visual Type ▾

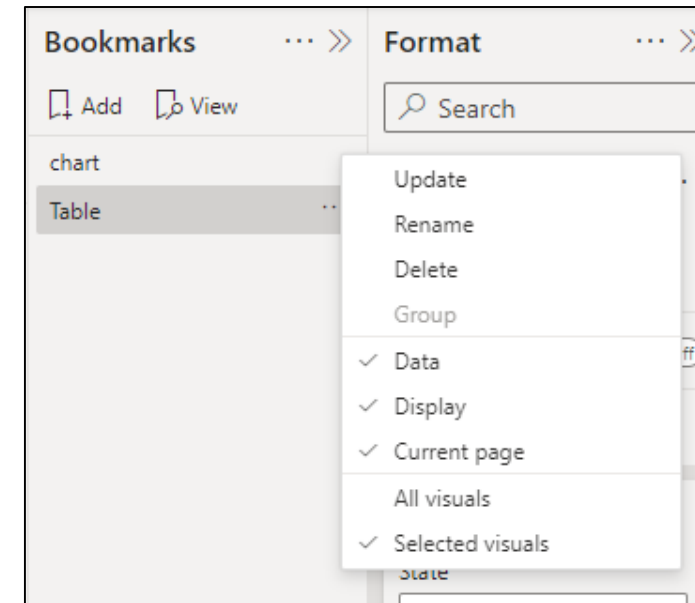
☐ Chart

☐ Table

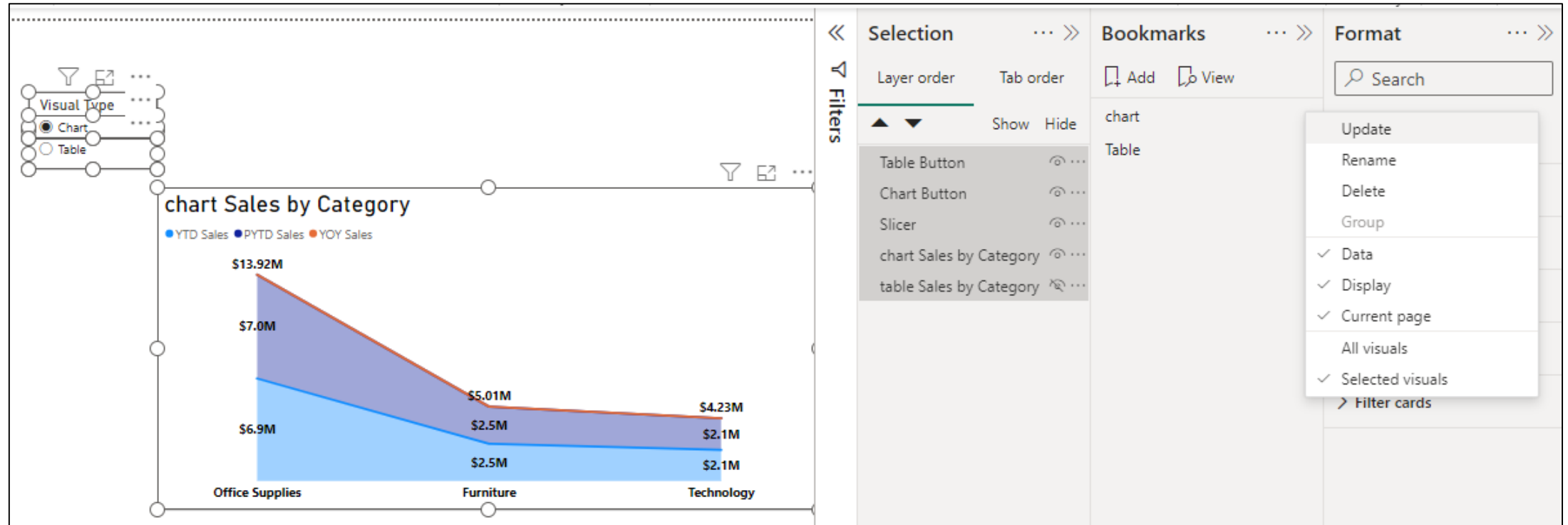
- Turn on selection and bookmark under view tab
- Insert two blank button and overlap them on visuals types and rename them in selection pane



In bookmark pane add two bookmark by clicking on add and rename them chart and table.
Click on 3 dots and make sure all 4 option are tick



- Select chart on slicer.
- Disable table visual in selection pane
- In bookmark pane, click on 3dots of chart and click update
- Chart bookmark is set



- Select table on slicer.
- Disable chart visual in selection pane
- In bookmark pane, click on 3dots of table and click update
- Table bookmark is set

The screenshot shows the Power BI interface with a table visual titled "table Sales by Category". The table has the following data:

category_name	YTD Sales	PYTD Sales	YOY Sales Trend
Furniture	\$2.52M	\$2.50M	0.73% ▲
Office Supplies	\$6.92M	\$7.00M	-1.22% ▼
Technology	\$2.10M	\$2.13M	-1.37% ▼

The Selection pane on the right shows the following items:

- Table Button
- Chart Button
- Slicer
- chart Sales by Category
- table Sales by Category

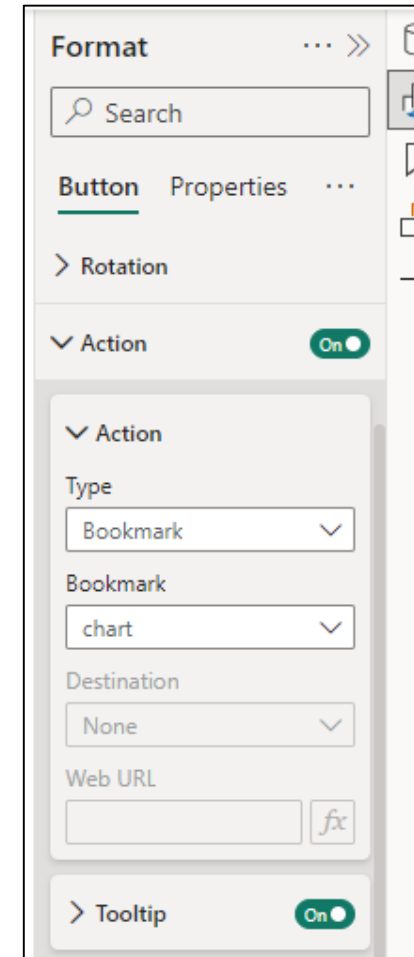
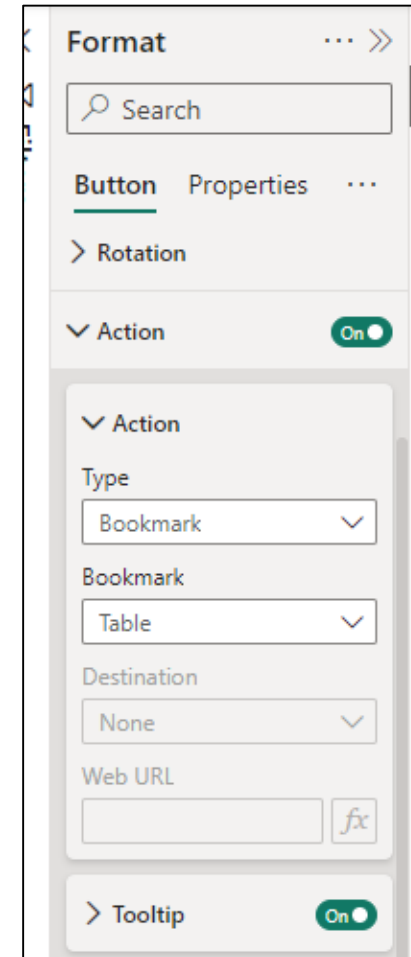
The Bookmarks pane on the right shows the following items:

- chart
- Table

The context menu for the "Table" bookmark is open, showing the following options:

- Update
- Rename
- Delete
- Group
- ✓ Data
- ✓ Display
- ✓ Current page
- All visuals
- ✓ Selected visuals

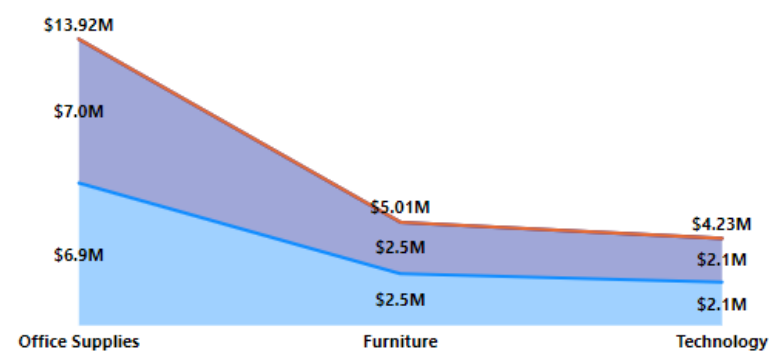
- To navigate buttons with charts
- click on buttons → format tab → turn on action → select type and bookmark name



Visual Type ▼
☒ Chart
☐ Table

chart Sales by Category

YTD Sales PYTD Sales YOY Sales



Final look

(NOTE– while clicking use CTRL+CLICK)

Visual Type ▼
☐ Chart
☒ Table

table Sales by Category

category_name YTD Sales PYTD Sales YOY Sales Trend

Furniture	\$2.52M	\$2.50M	0.73%	▲
Office Supplies	\$6.92M	\$7.00M	-1.22%	▼
Technology	\$2.10M	\$2.13M	-1.37%	▼



THANK YOU

- MAYURI .D.