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Hierarchies & Drill through in Power BI

TRANSFORM YOUR DATA INTO DECISIONS!



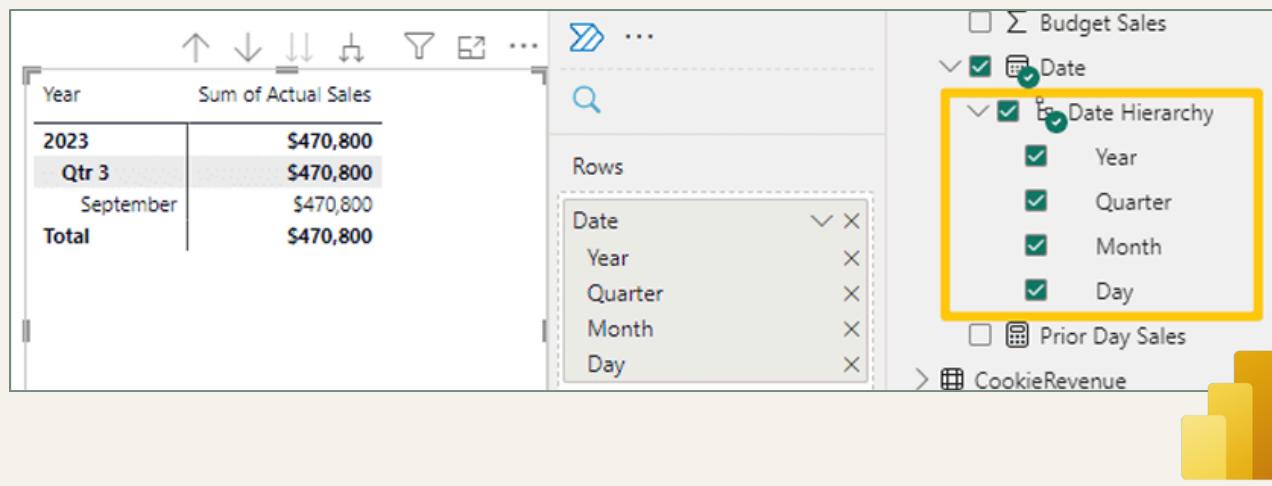
Hierarchies

Hierarchies in Power BI are a way to organize data into levels of granularity, enabling users to drill down from higher to more detailed levels. Hierarchies typically have two or more levels, with each level representing a more granular view of the data.

Think of a hierarchy as a parent-child relationship between data fields. For example:

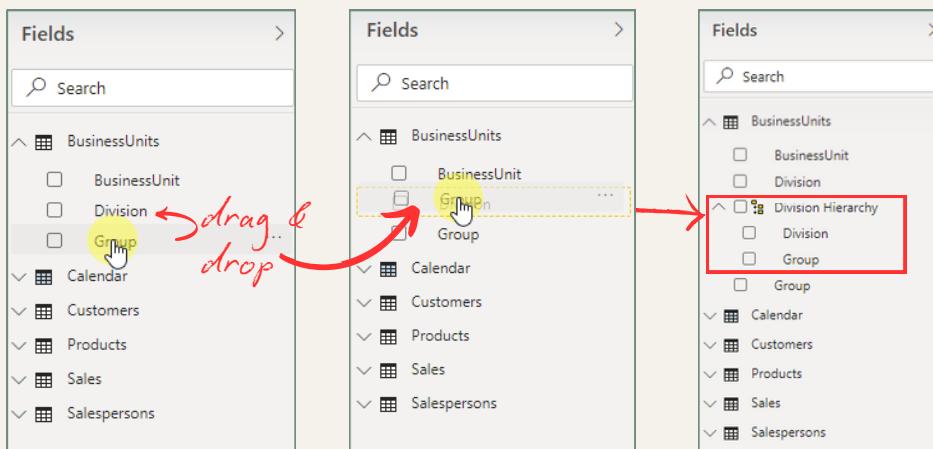
- **Date Hierarchy:** Year → Quarter → Month → Day
- **Geography Hierarchy:** Country → State → City
- **Product Hierarchy:** Category → Subcategory → Product

Hierarchies make reports more interactive and allow for better data exploration.

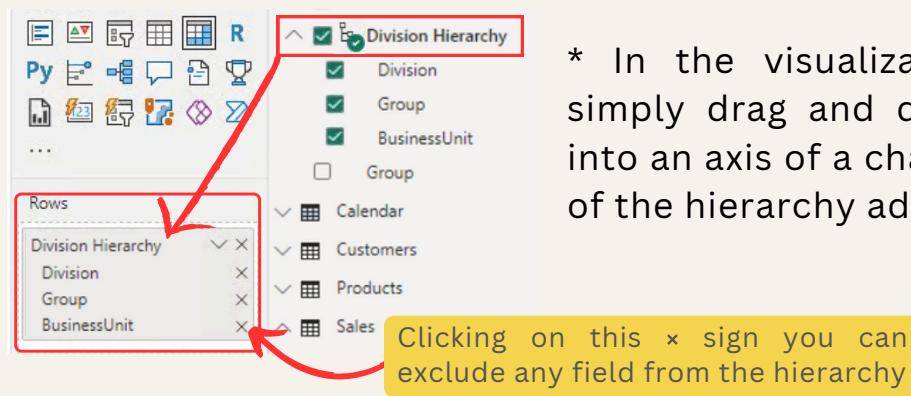


How Create a Hierarchies

1. Drag and drop fields one onto another in the Fields pane.
2. Power BI will create a new hierarchy, and you can rename it (e.g., "Date Hierarchy").



3. To add another level to the hierarchy, you can either simply just drag the field to the Hierarchy header or right-click on the field and use "Add to hierarchy".



* In the visualization tab, you can simply drag and drop the hierarchy into an axis of a chart and see all fields of the hierarchy added there.



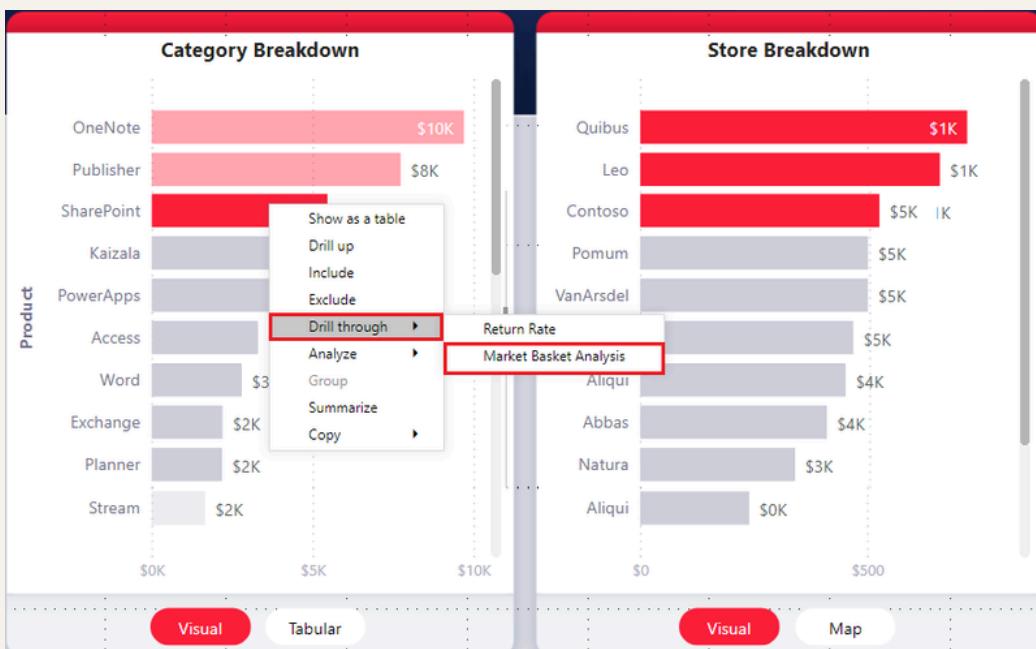
Auto-created Hierarchies:

When you use a Date column in visuals, Power BI can automatically generate a hierarchy with levels:
Year → Quarter → Month → Day.

Drill through

Drill through in Power BI allows users to navigate from a summary report page to a more detailed page, passing filter context along the way.

Example: Click on a specific product in the sales report → go to a Product Detail Page



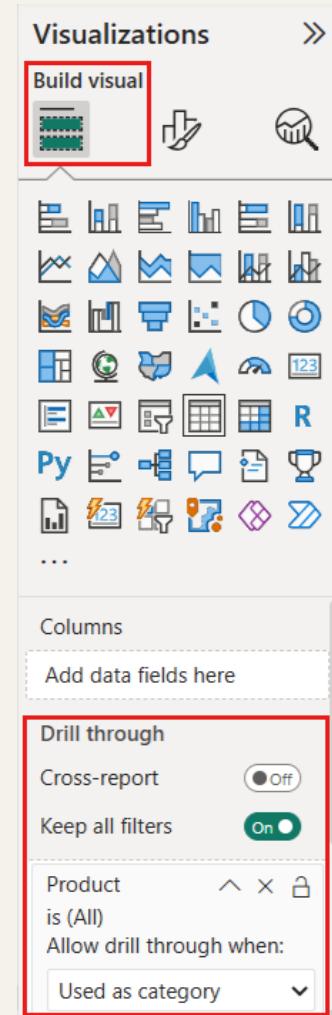
- When to Use:**
- Keeps main report clean
 - Deep dive into individual records
 - Makes data exploration smooth



How Create a Drill through

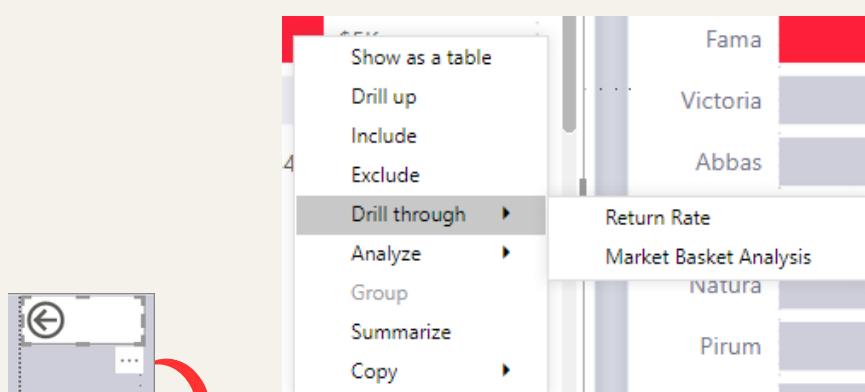
Step 1: Create the Drill through Page

- Add a new page in your report.
- Drag the field(s) you want to drill through into the "Drill through" filters well on the right pane (e.g., Region, Customer, or Product).
- Add visuals to display detailed data.



Step 2: Drill through in Action

- Go to the main page of your report.
- Right-click on a visual (like a bar for a region or product).
- Click Drill through > [Your Page Name] to navigate to the details.



Note: When you add a field to the Drill through well, Power BI automatically creates a *back button* visual. This allows users to return to the previous page after drilling through. You can also add this button from Insert tab, clicking on Back button.



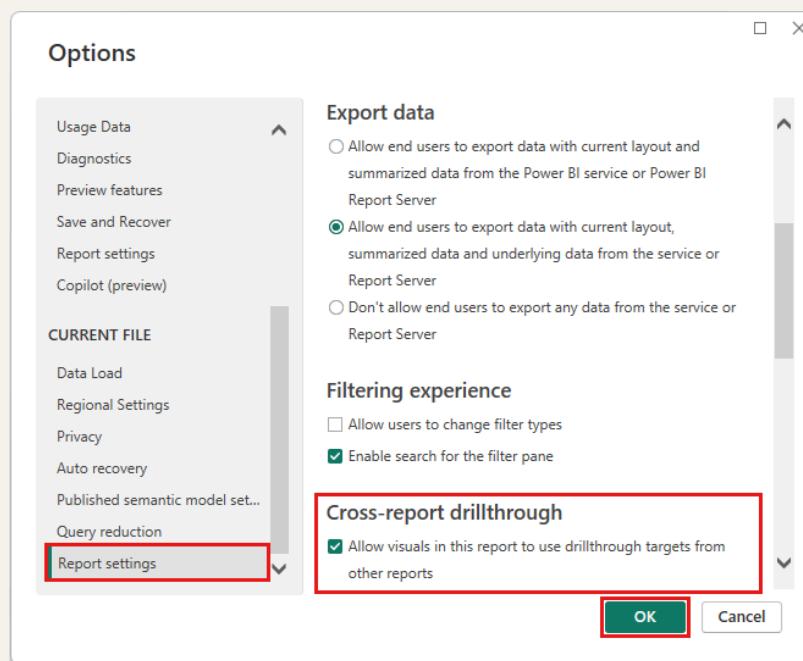
Cross-Report Drill through

With the Power BI cross-report drill through feature, you can contextually jump from one report to another report that have related content in the same Power BI service workspace or app.

Enable cross-report drill through

Step 1: In Power BI Desktop

1. Go to File > Options and settings > Options.
2. In the Options window left navigation, at the bottom of the Current file section, select Report settings.
3. At bottom, under Cross-report drill through, select Allow visuals in this report to use drill through targets from other reports.

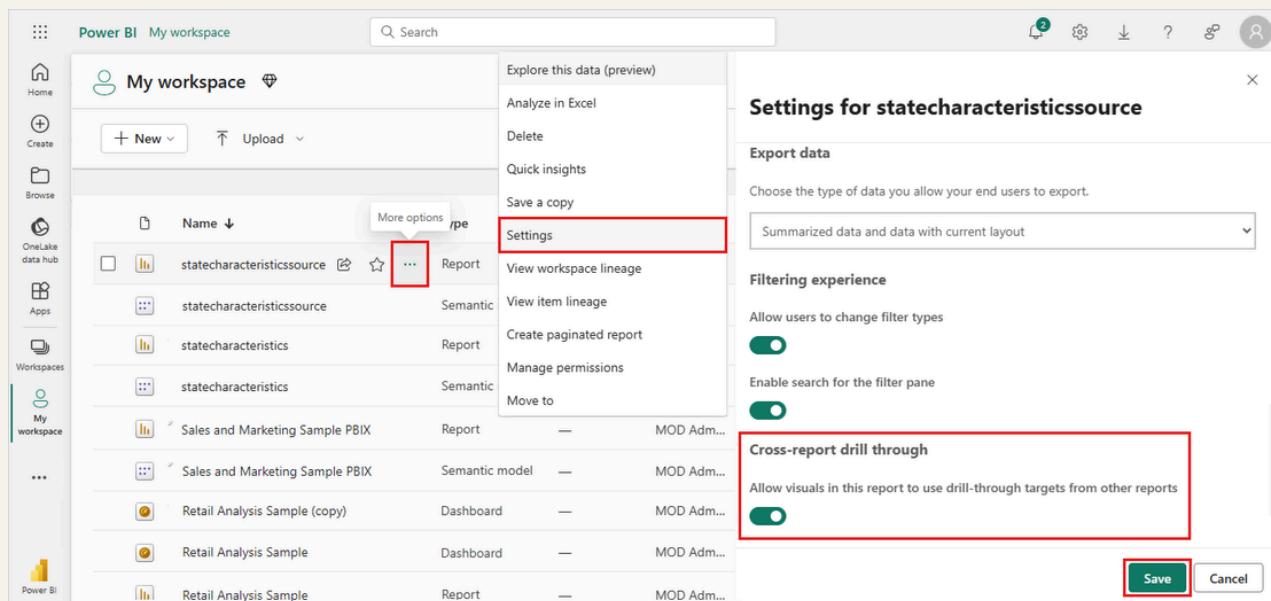


4. Select OK.



Step 2: In the Power BI service

1. Select the workspace that contains your target and source reports.
2. Next to the source report name in the workspace list, select the **More options** symbol, and then select **Settings**.
3. Near the bottom of the **Settings** pane, under **Cross-report drill through**, select **Allow visuals in this report to use drill-through targets from other reports**, and then select **Save**.



Set up a cross-report drill through target

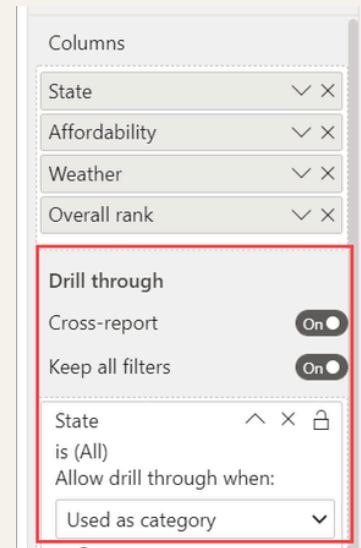
1. Edit the target file, and on the target page of the target report, select the **Fields** section of the **Visualizations** pane.
2. Under **Drill through**, set the **Cross-report** toggle to **On**.



3. Drag the fields you want to use as drill through targets into **Add drill-through fields here**. For each field, select whether you want to allow drill through when the field is used as a category, or when it's summarized like a measure.
4. Select whether you want to **Keep all filters** for the visual. If you don't want to pass filters applied to the source visual to your target visual, select **Off**.

Tips:

- If you're using the page for cross-report drill through only, delete the Back button that's automatically added to the canvas. The Back button only works for navigation within a report.
- After you configure the target page, save the report if you're using the Power BI service, or save and publish the report if you're using Power BI Desktop.



Now your reports are ready for cross-report drill through.

You can see the results in the target cross-report drill through page, just as you set them up when you created the target.



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