Tasks

Task 1 - Download and open Lesson 7 pbix file

Step 1: Click <u>link</u>to download **Lesson 7 Digital Storytelling**, and save it to **C:\PBExams**.

Step 2: Open **Power BI Desktop**. Click **File**, and select **Open Report**.
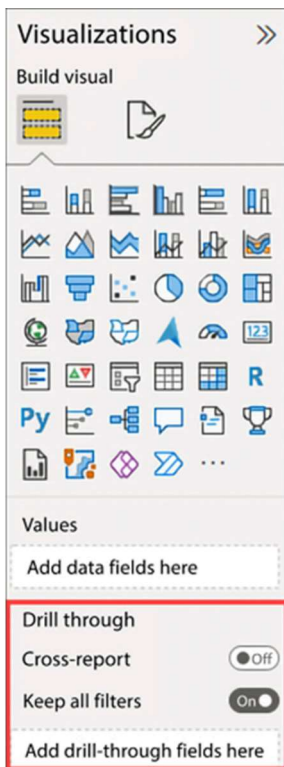
Step 3: Browse to **C:\PBExams**, and select **Lesson 7 Digital Storytelling.**

Task 2 - Configuring drill through

In *Lesson 6*, *Visualizing Data*, you saw the power of filtering to allow a single visual to provide many different views of the data. For instance, a bar chart showing all sales could also show sales by year if cross-filtered by a date slicer. You also saw how the filter pane could be applied to visuals on a single page or across the entire report. Up to this point, those were the only two options available. The **drill through** feature allows users to navigate from one report visual to another report page while maintaining the filter context of the visual.
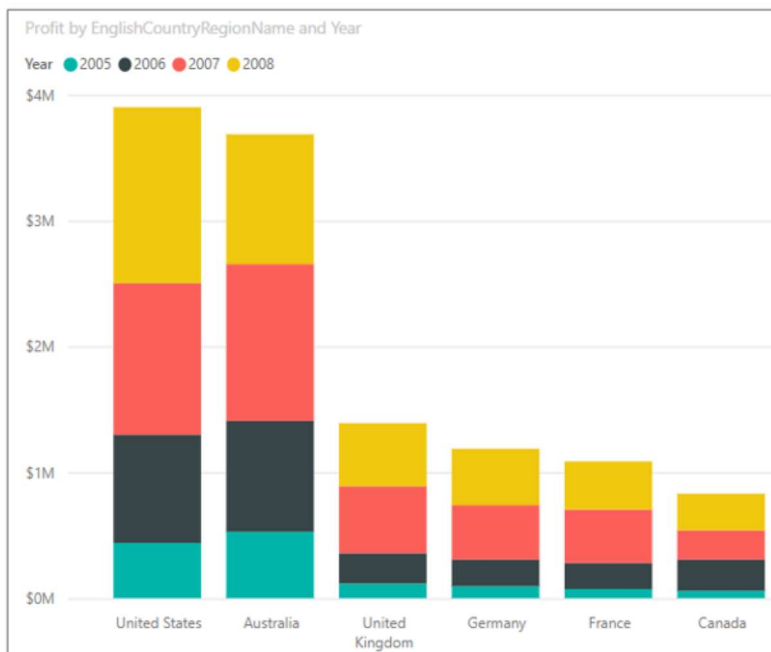
Drill through filters are applied at the page level only and are configured in the **Fields** section of the **Visualizations** pane; they cannot be applied at the visualization or report level. The **Drill through** section has three options to configure:

- **Cross-report**: Drill through to another report in the same Power BI workspace or app when deployed to the Power BI service. There are a few special considerations with this scenario, like the drill through table and column names matching in both reports and the data in each field being case-sensitive.
- **Keep all filters**: When enabled, all filter context from the source visual in addition to the fields listed in the field bucket will be applied. When disabled, only fields listed in the Drill through field bucket will be applied as filters.
- **Add drill-through fields here**: Fields added to this bucket will automatically be enabled for drill through any time they are present in a visualization on any other page within the same report.

Step 1: Create charts displaying profit by country and year:

1. **Create two new report pages:** the first one should be called **Summary** and the second **Drill Through.**
2. Navigate to the **Summary** report page and add a **Stacked column chart** visual. Move and resize the visual to take up the right half of the **Report** canvas.
3. From the **Fields** pane, drag the **Profit** measure from the **Internet Sales** table to the **Y-axis** bucket.
4. From the **Fields** pane, drag Region **Drilldown** from the **Geography** table to the **X-axis** bucket.
5. From the **Fields** pane, drag **Year** from the **Date (Order)** table to the **Legend** bucket.
6. Drill up twice.
7. Sort axis:

8. Next, navigate to the **Drill Through** page. Add a **Table** visual. Move and resize the visual to take up the left third of the **Report** page, but leave a small amount of space above the visual, approximately 1/16 the height of the report page.
9. From the *Fields* pane, drag the following fields to the *Columns* bucket:
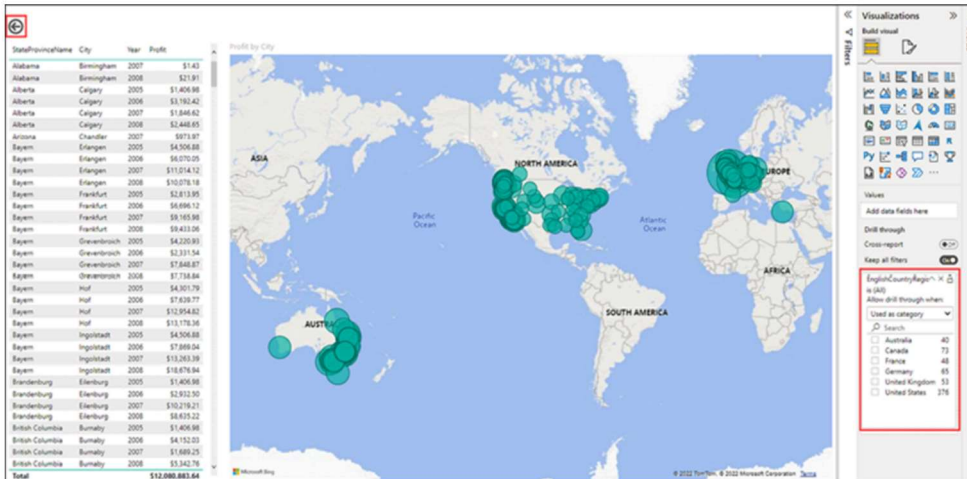   - **StateProvinceName** from the **Geography** table

- ○ **City** from the **Geography** table
- ○ **Year** from the **Date (Order)** table
- ○ **Profit** from the **Internet Sales** table

10. Add a **Map** visual to take up the right two-thirds of the *Report* page.
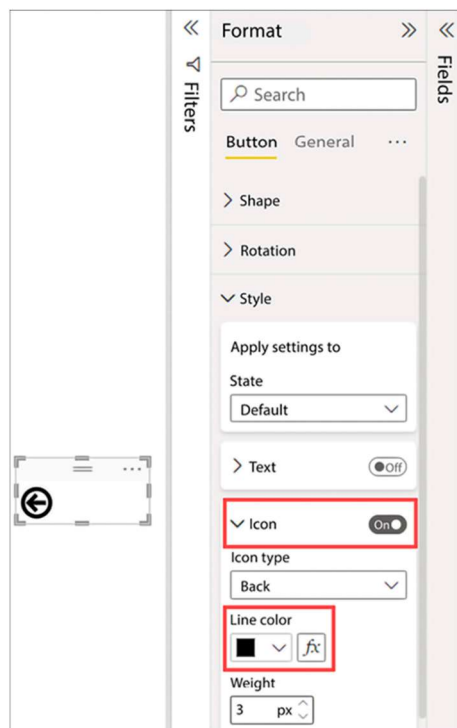11. From the **Fields** pane, drag **City** from the **Geography** table to the **Location** bucket.
12. From the **Fields** pane, drag the **Profit** measure from the **Internet Sales** table to the **Bubble size** bucket.
13. Finally, populate the **Drill through** fields by dragging **EnglishCountryRegionName** from the **Geography** table to the **Drill through** bucket:

When placing a field into the **Drill through** bucket, you will notice that a backward **arrow image** is automatically added to the page in the upper left-hand corner (see figure above). This is simply an image that has been set with an action to go back to the previous page. By selecting the image, you will find that there are quite a few familiar format settings available in the **Format** section:
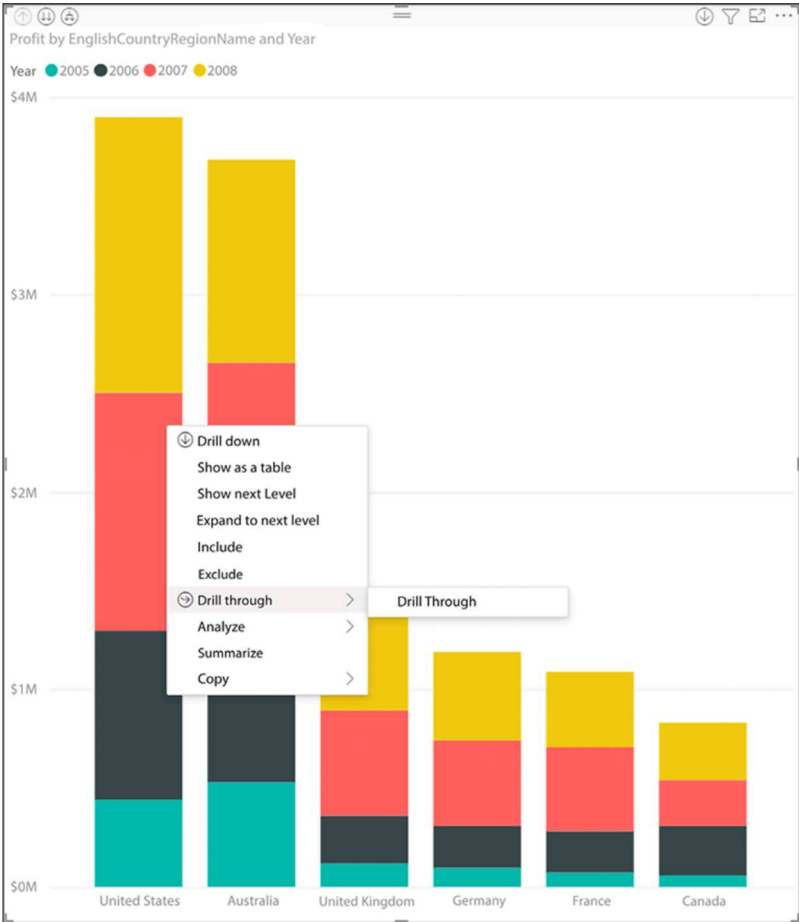
One of the more common settings to change is the **Line color** option under **Icon**, which will allow the selection of a color to make the back arrow more visible:

Step 2: Using Drill through:
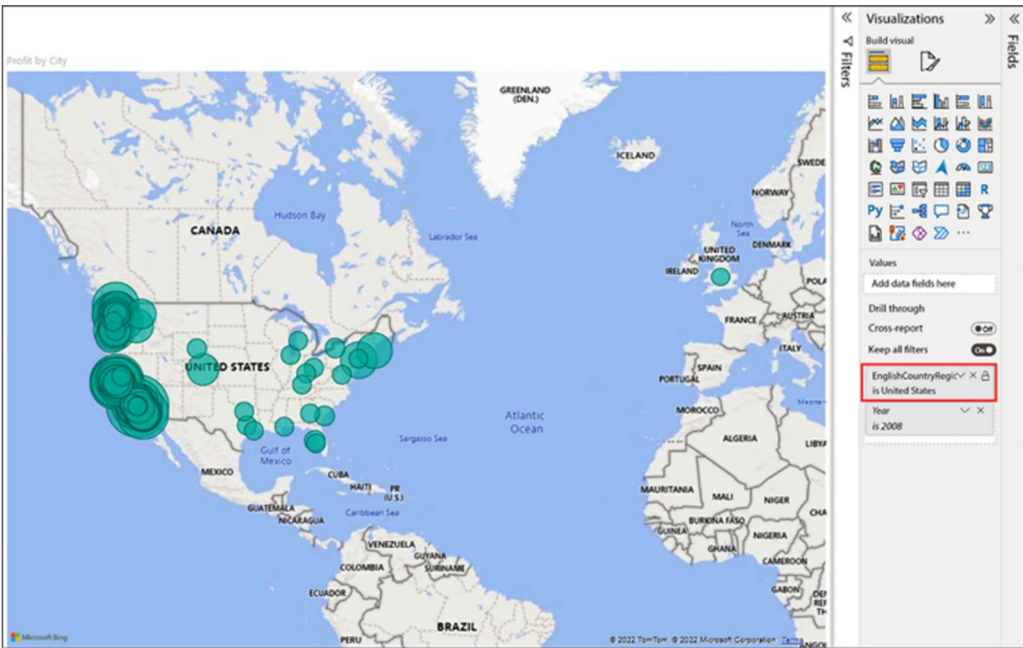
1. Navigate to the **Summary** page.

2. Right-click the **2008 section for United States**. There is now an option called **Drill through**. Hovering the mouse over this new option will present a list of available drill through reports. In this scenario, only one option exists. It is important to note that you can have as many drill through reports as you desire.

2. Click the **Drill through** option:
3. Upon left-clicking the **Drill through** option, you will be taken to the corresponding **Drill Through** page. Notice both visuals have been filtered by the value of *United States,* and because the **Keep all filters** option is turned on, they are also filtered to the context of only **2008**.

Had the Keep all filters option been turned off, the visuals would be displaying only the United States, but all years:

As you can see, using drill through in this scenario allows you to dive deeper into sales records for a specific country, in a specific year. If you were to navigate back to the Summary page (using the page navigation or holding down *Ctrl* while clicking the back button in the top-left corner of the canvas) and make a different selection, those new filters would take effect on these two visuals. Thus, you can see that now you have two report pages that interact with each other. As more and more pages are added to the report, users will always have the option to drill through to this report page with whatever filters they have chosen, provided the visual uses the **EnglishCountryRegionName** field.

End-of-Exercise

Olet suorittanut 0 % oppitunnista

Olet kirjautunut nimellä Janne Bragge. (Kirjaudu ulos)
PowerBI

Suomi (fi)
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