

Setting up Power BI Drillthrough in Reports

You can use Power BI Drillthrough to help create a page in the Power BI Reports, with a specific entity as the main focus. This entity can be the customer, supplier, or manufacturer. This is a method that lets you delve deeper into the details of a particular component, and gather actionable insights.

In this article, you will look at the steps involved in the Power BI Drillthrough setup for your Power BI Reports. The setup consists of 4 components namely Destination Page, Back Button, Filters, and Measure to make the process easier.

Table of Contents

- [Introduction to Power BI Drillthrough](#)
- [Understanding the Power BI Drillthrough Setup Process & Components](#)
- [Power BI Drillthrough Destination Page](#)
- [Power BI Drillthrough Back Button](#)
- [Power BI Drillthrough Filters](#)
- [Power BI Drillthrough Measure](#)
- [Cross Reports Drillthrough](#)

Introduction to Power BI Drillthrough

The Drillthrough feature in Power BI functions as an indicator for a Power BI Report. This allows you to dig deeper into the details of a specific type of data or a specific type of value generated/displayed.

With Power BI Drillthrough, you can navigate to different layers of the data of a given category data set. It allows you to switch from one report to another while still analyzing the same set of data. For instance, a tabular report of Sales data can have a button that lets the users switch to an analysis grid of the same data, or a heat map to visualize the same set of data.

Power BI Drillthrough, therefore, is essential to get a holistic understanding of your data, since you don't have to rely on just one data visualization, report, or feature to put your point across. Power BI Drillthrough lets you analyze the same data with different features and several visualization methods.

Understanding the Power BI Drillthrough Setup Process & Components

You need to right-click a data point on the report page you are interested in. Then you can Drillthrough to the focused page to get the details you need. This is what you will be doing by setting up Power BI Drillthrough. You can set up Drillthroughs for your reports in the Power BI Service or Power BI Desktop. First, you need to decide on a master report for your target report. Once you have decided on the report tabs, you can build multiple Drillthrough reports.

There are few drillthrough techniques:

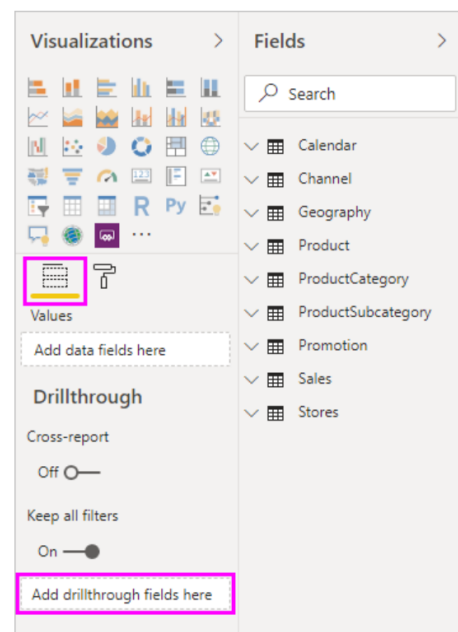
- Power BI Drillthrough Destination Page
- Power BI Drillthrough Back Button
- Power BI Drillthrough Filters
- Power BI Drillthrough Measure
- Cross Report Drillthrough

Power BI Drillthrough Destination Page

Step 1: First, create a report page that has the visuals for the entity, for the Drillthrough. For instance, you wish to set up a Drillthrough for the manufacturers. The Drillthrough page in Power BI could contain visuals depicting Total Units Shipped, Total Sales, Sales by Region, Sales by Category to name a few. So, when you Drillthrough to that page, the visuals would be specific to the manufacturer you picked.

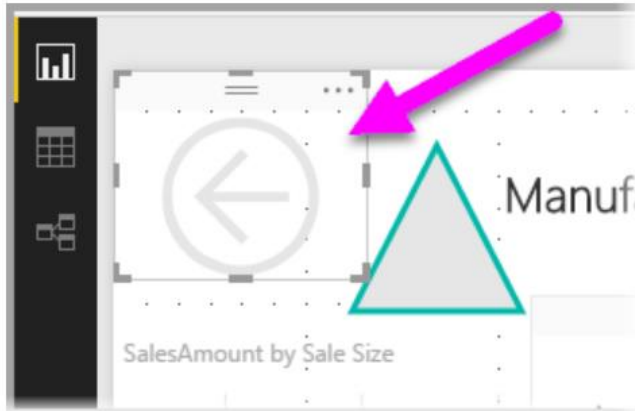
Step 2: Next, on that Drillthrough page, in the fields section under the Visualizations pane, drag the field, to enable it in the Drillthrough filters well.

Step 3: When you add a field in the Drillthrough filters, Power BI creates a Back Button visual automatically. This visual can function as a button in published Power BI Reports. The users working with your report through the Power BI service can leverage this button to go back to the report page from where they came from. You need to keep in mind that you can configure



and perform Drillthrough to a page in the same report, but you can't Drillthrough to a page that exists in a different report.

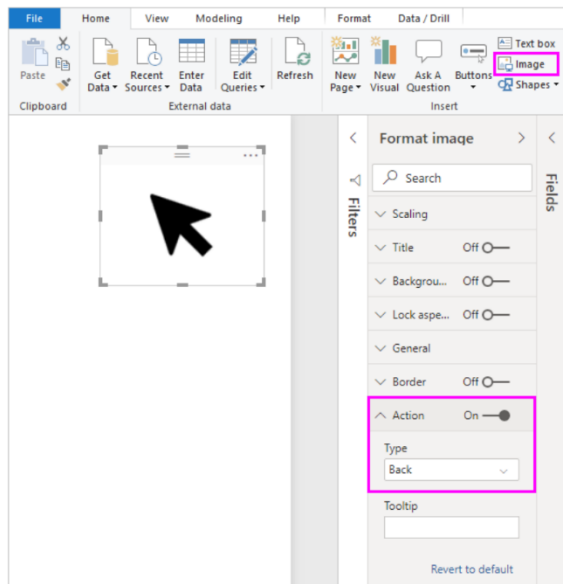
Power BI Drillthrough Back Button



The Back Button as discussed in the previous section is present as an image. Since it is an image, it can be replaced by any visualization you like. It still maintains its functionality as a back button for users to return to the report page they came from. To customize the image for the Back Button you can go through the following steps:

Step 1: On the Home tab, select Image. Choose your desired image and then place it on the Drillthrough page.

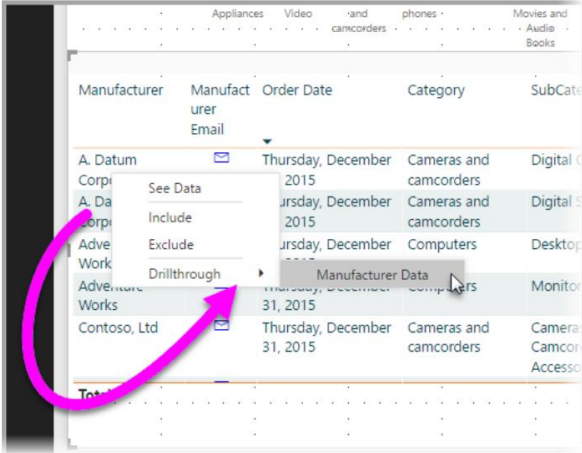
Step 2: Select the new image on the Drillthrough page. Go to the Format Image pane and set the **Action** slider to **On**, and the **Type** option to **Back**. Your image is now a Back Button.



Step 3: Users can now right-click a data point in their report, and get a context menu that supports Drillthrough for that page. On choosing to Drillthrough, the users can then see the information about the data-point they picked on the report page. Suppose, a user right-clicked a data point

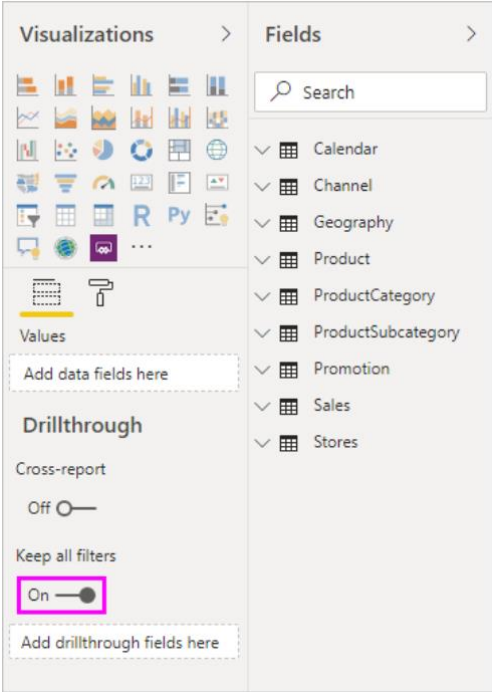
about Contoso, a manufacturer. Now the Drillthrough page that they go to will be filtered to Contoso's visuals.

Power BI Drillthrough Filters



All applied filters can be passed into the Drillthrough window. For instance, you can pick only a certain category of products, along with the visuals filtered for that category, and then opt for Drillthrough. Power BI Drillthrough Filters allow you to apply filters on multi-level reports. Here is a look at how you can pass all the filters through Power BI Drillthrough:

Step 1: To retain all the applied filters, you can go to the Drillthrough section in the Visualizations pane and set **Keep All Filters** to **On**.



Step 2: While drilling through a visual, you can view the filters that were applied as a result of the source visual having temporary filters. The transient filters in the Drillthrough section of the Visualizations pane are shown in italics.

Step 3: You can carry out the above-mentioned steps using the tooltips pages as well but this route isn't recommended. This is mainly due to a few discrepancies in its performance.

Power BI Drillthrough Measure

Apart from the filters, you can also add a Measure or a summarized numeric column to the Drillthrough area. Follow the steps mentioned below:

Step 1: Drag the Drillthrough field to the Drillthrough card and apply it.

Step 2: While you add a Measure or summarized numeric column, you can Drillthrough to the page when the field is used in the Value component of the visual.

With this, you have now set up Power BI Drillthrough for your Power BI Reports. This is a great way to get a larger view of the entity information that you chose through the Drillthrough filter.

Power BI offers another type of Drillthrough feature, termed as Cross-Report Drillthrough. This allows you to move from one report to another in the same Power BI Service or application. Cross-Report Drillthrough can be used to connect reports that have related content. This can also be used to pass filter context along with the Cross-Report connection. The only drawback for Cross-Report Drillthroughs is that they don't work with the Power BI Reports made using the Power BI Report Server.

Cross Reports Drillthrough

With the Power BI cross-report drillthrough feature, you can contextually jump from one report to another report in the same Power BI service workspace or app. You can use cross-report drillthrough to connect two or more reports that have related content, and to pass filter context along with the cross-report connection.

To initiate cross-report drillthrough, you select a data point in a source visual of a source report, and then select the cross-report Drillthrough target from the context menu.

Enable cross-report drillthrough

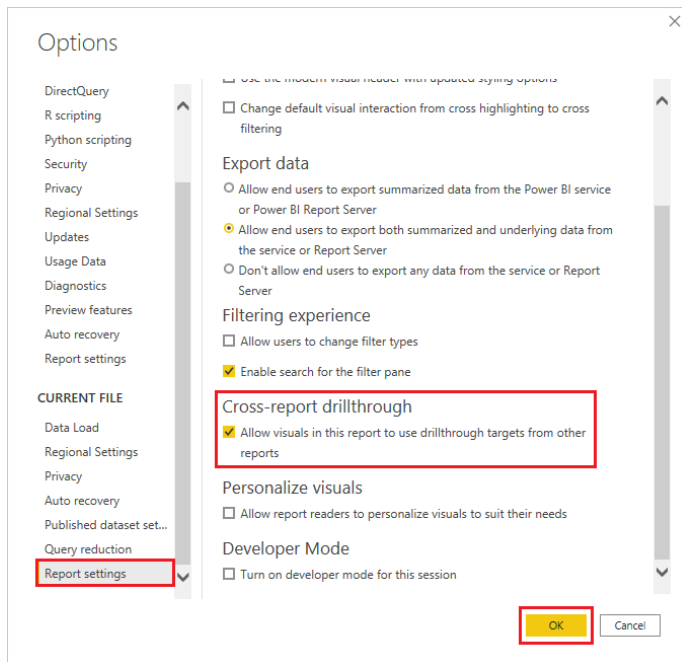
The first step in enabling cross-report drillthrough is to validate the data models for the source and target reports. Although the schemas in each report don't have to be the same, the fields you want to pass must exist in both data models. The names of the fields, and the names of the tables they belong to, must be identical. The strings must match, and are case-sensitive.

For example, if you want to pass a filter on a field State within a table US States, both models must have a US States table, and a State field within that table. If not, you must update the field name or table name in the underlying model. Simply updating the display name of the fields won't work properly for cross-report drillthrough.

After you validate your models, enable the source report to use cross-report drillthrough.

1. In Power BI Desktop, 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 right, under **Cross-report drillthrough**, select **Allow visuals in this report to use drillthrough targets from other reports**.

4. Select OK.



You can also enable cross-report drillthrough from the Power BI service.

1. In Power BI service, 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 drillthrough, select Allow visuals in this report to use drill-through targets from other reports, and then select Save.

Power BI

msit.powerbi.com/groups/me/list

Microsoft Power BI My workspace

My workspace

+ New

All Content Datasets + dataflows

Name	Type	Owner	Refreshed
statecharacteristicssource	Report	Any User	1/16/20, 5:00
statecharacteristicssource	Analyze in Excel	Any User	1/16/20, 5:00
statecharacteristics	Delete	Any User	1/16/20, 5:01
statecharacteristics	Quick insights	Any User	1/16/20, 5:01
statecharacteristics	Save a copy	Any User	1/16/20, 5:01
Sales and Marketing Sample PBIX	Settings	Any User	6/11/21, 10:3
Sales and Marketing Sample PBIX	View usage metrics report	Any User	6/11/21, 10:2
rewrite-article	View lineage	Any User	3/5/18, 11:08
Retail Analysis Sample (copy)	Create paginated report	Any User	—
Retail Analysis Sample	Manage permissions	Any User	—
Retail Analysis Sample	Dashboard	Any User	—
Retail Analysis Sample	Report	Any User	3/5/18, 11:08
Retail Analysis Sample	Report	Any User	3/20/18, 1:47
Retail Analysis Sample	Report	Any User	4/10/18, 3:25
Retail Analysis Sample	Report	Any User	4/13/21, 11:4

Settings for statecharacteristics...

Apply this label to the report's downstream content (preview)
[Learn more](#)
[See the downstream items in lineage view](#)

Filtering experience

Allow users to change filter types

Enable search for the filter pane

Cross-report drill through

Allow visuals in this report to use drill-through targets from other reports

Comments

Allow users to add comments to this report.

Personalize visuals

Allow report readers to personalize visuals to suit their needs.

Modern visual tooltips

Use modern visual tooltips with drill actions and updated styling

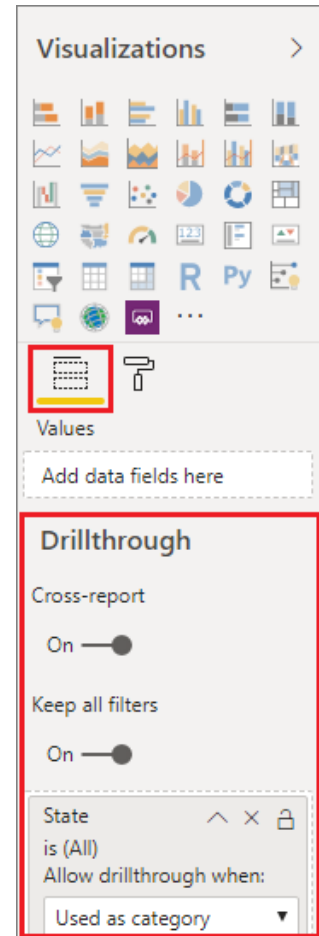
Save Cancel

Set up a cross-report drillthrough target

Setting up a target page for cross-report drillthrough is similar to setting up drillthrough within a report. Enabling drillthrough on the target page allows other visuals to target the page for drillthrough. To create drillthrough within a single report, see Use drillthrough in Power BI Desktop.

You can set up a target for cross-report drillthrough in Power BI Desktop or Power BI service.

1. Edit the target file, and on the target page of the target report, select the Fields section of the Visualizations pane.
2. Under Drillthrough, set the Cross-report toggle to On.
3. Drag the fields you want to use as drillthrough targets into Add drillthrough fields here. For each field, select whether you want to allow drillthrough 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.
5. If you're using the page for cross-report drillthrough only, delete the Back button that's automatically added to the canvas. The Back button only works for navigation within a report.
6. 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.



Conclusion

This exercise discusses about setting up Power BI Drillthrough in Power BI Reports. It provides a step-by-step guide for a better understanding. Through the 4 components used for the Power BI Drillthrough setup, you can start implementing it for your workflow, to amp up your efficiency.