

Scheduling report/dashboard in Power BI

Version 1.0

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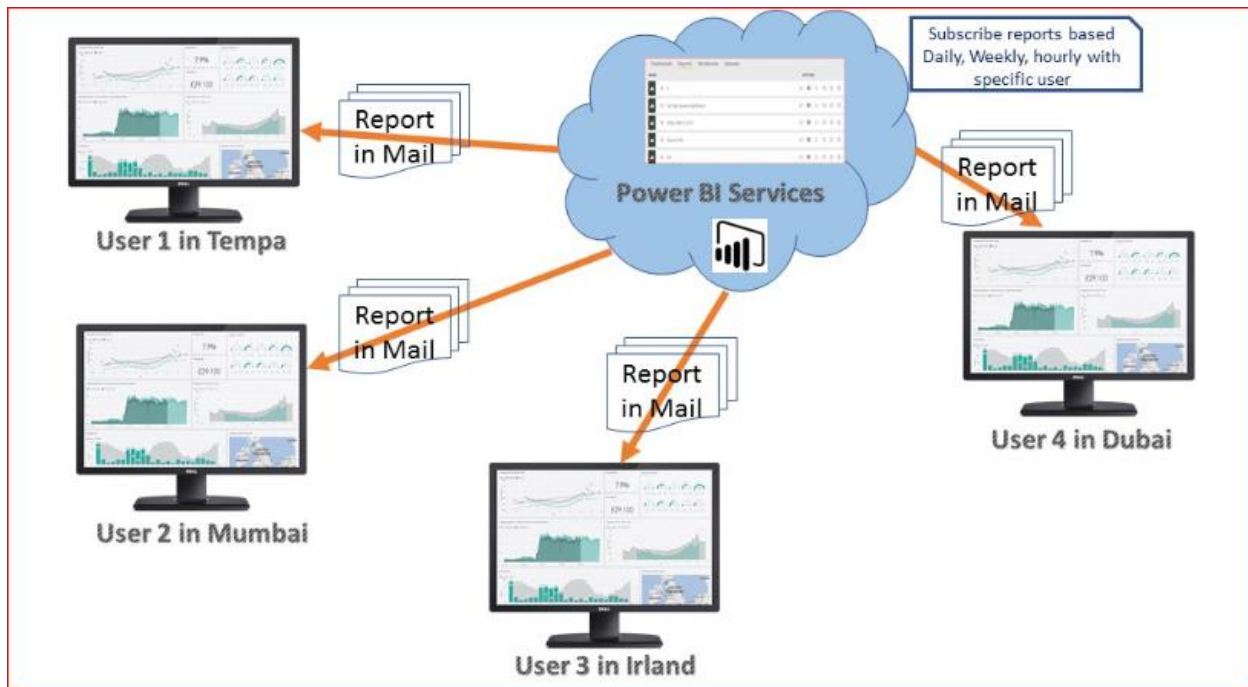
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Purpose

This document covers the concept of “Scheduling” in Power BI services. This is high level document assumes resource has basic knowledge of Power BI Concepts.

Introduction of Scheduling: -

Generally, ‘Schedule’ is called as plan. The purpose may be different, but we need a schedule to execute a plan. In every reporting tool, there is a feature to schedule the report and send mail to desired user in different format i.e. Excel, PDF, HTML, etc. In Power BI, there is also a same feature called “Subscribe” but it has limitations.



Requirements: -

- To do scheduling in Power BI, we need to have Pro licenses.
- To create the subscription, we must have edit authentication for report or dashboard.
- Since subscription emails are only sent when a dataset is updated or refreshes, subscriptions don't work on datasets that don't update or refresh.
- To refresh the dataset on schedule basis we need to install "Gateway".

How to do scheduling: -

It's difficult to reach every morning in office and go to Power BI services and check the updated report. The users has requirement to schedule the reports based on their prerequisite. To get the updated data into the report we need to install the gateway and schedule the dataset. Once the report gets updated data we can share it with specific users by scheduling it.

There is no direct scheduling available in Power BI services. Firstly we need to have Pro licenses for this, only then we can subscribe the report or dashboard page to the user and on recurrence basis it will automatically share snapshot into user inbox.

Please follow below steps to create subscription -

1. Go the Power BI services.
2. Open the report or dashboard which we want to schedule.
3. Check in righthand corner there is “Subscribe” button option available. Click on it.



4. Fill the required details. i.e. Mail ID, Email Message, Mail Subject.

OPPORTUNITY ANALYSIS SAMPLE

Subscribe to emails

+ Add another subscription

5 Days Levae Dashbaord On

Subscribe

Enter email addresses

Subject

5 days Leave Dashboard

Hi Mark,

Please find attahced
file showing last five
days levae taken by
emppoly.

Regards,
Macro

i You will be sent an email whenever the
data is updated, but no more than once
per frequency selected.

☒ Also give access to this dashboard

[Manage all subscriptions](#)

5. Now click on Save and Close button.

Save and close Cancel

In this way, we can subscribe the report or dashboard.

Limitations: -

1. We cannot do direct scheduling of the report or dashboard.
2. If we did subscription, then it will send snapshot only not full report.
3. We cannot share report as PDF format.
4. If dataset is not updated or refreshed it will not share the report on that day.
5. If we change the report page name where subscription is already done then we need to recreate subscription.
6. Email subscriptions only support certified custom visuals.
7. If any component has row level security (RLS) applied, those tiles will not display in email snapshot.
8. Email subscriptions are sent with the report's default filter and slicer states. If any changes are made in the default reports after subscription then those changes will not be seen in the email.
9. In dashboard subscription some of tiles are supported including streaming tiles, video tiles, custom web content tiles.
10. We cannot do subscription for outside user from our tenant.
11. If image size is extremely large, then there is possibility that subscription may get failed.

Conclusion :- As per the Microsoft Power BI community there is no such facility available to schedule report directly, work is in progress and we will get it soon. For time being, we need to use subscription method to schedule reports.