



Dynamic Subscriptions

In Power BI



Introduction

In the age of data, the speed and accuracy of delivering information is key to decision-making. Today, we will learn how Power BI allows us to automate the delivery of personalized reports efficiently with its dynamic subscriptions. This functionality will enable you to send filtered reports tailored to each recipient according to their roles or needs, improving collaboration within your team and optimizing the workflow.

Dynamic Subscriptions

Dynamic subscriptions in Power BI are a feature that allows you to automate the delivery of personalized reports to different recipients according to their specific needs. Through these subscriptions, you can set up reports that are automatically sent by email, but with an added value: the data within those reports is filtered or specifically tailored for each recipient.

Choose a subscription ty	/pe
Standard Generate and deliver one report.	Ø
Dynamic per recipient Connect to a dataset and send a unique view of the report to each recipient.	000

Let's get to work!

Conectarse a datos que tengan correo electrónico de destinatario, nombres o parámetros de informe.

 Connect to recipient data 	Connect to recipient data						
 Select and filter data 	Choose a connected semantic model w subscription's dynamic fields, such as ex-						
Email details	🚱 All (8. My data) (9. Er	ndorsed in your org	ecent			O, Filter by keyword	
Map your data	C Name	Owner	Refreshed	Location	Endorsement	Sensitivity	
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Swipe

Let's go work!!!

Next, select and filter the data you want to include in your subscription. You likely only want to send emails conditionally. To do this, you can filter the data in the "Filter" panel.

	Choose the data you want be net dynamically: • Final address • Final address • Report filters • Attachment file type Employee Name Ateus Brown Aresis Brown	Manager Name John Smith	dynamic fields. The following fields Email alexs brown⊛example.com	s can Status Overdue		Filters	~ >>	Data »
	Alexis Brown	John Smith					~ >	Data >>>
Desires and Galds			alexis.brown@example.com	Overdue				
Dealers and Bolds	Amelia Donan				Build	D Search		P Search
		Jonathan Lee	arrelia.brown@example.com	Pending	-			EmployeeTrainingData
	David Rodriguez	Jonathan Lee	david rodriguez@example.co m	Overdue		Employee Training Data		
	ümma Jackson	Emily Davis	emmajadscni@erample.co m	Overdsle		> Email	~	L Odeson
	Isabella Adams	Kim Smith	isabella.adams@inxample.co m	Overdue		✓ Status	¢ ×	∑ □ Completion > □ Due Date
	John Smith	John Smith	johnsmith@example.com	Overdue		Filter type		
	John Smith	John Smith	johnsmith@example.com	Pending		Basic filtering	~	Due Month
	Jonathan Garcia	Emily Devis	jonathen.garcia@example.co m	Pending		,₽ search		∑ ⊡ Due Year
	Jonathan Lee	Jonathan Lee	kinsmth@cx2mpla.com	Pending		Select all		Employee Name
	Julie Brown	John Smith	julie.brown@example.com	Pending		Completed		
	Justin Hernandez	Kim Smith	justin herrandez@example.c om	Overdale		Overdae		EManager
	Lify Wong	John Smith	hty:wong@example.com	Pending		Pendina		
	Nora Robinson	Kim Smith	norarcbirscn@example.co m	Overdsie		 Started 		Status

Let's go work!!!

You can select the email addresses of the recipients and the subject of the email from the dataset you connected to by selecting "Get Data."

	Subscription name *
Map your data	Sales Overview
	Recipients*
Schedule	Enter manually 🖌 🚳 Nirupama Srinivasan 🛛
	Enter manually
Review and finish	Get from data > Employee Training Data.Employee Name
	Message Employee Training Data.Manager Name
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	Report page 🛈
	Sales Overview 🗸
	Link to report in Power BI
	Report page preview
	Data Activator
	Irigger action based alerts with Data Activator.
	Attach full report
	B PDF ✓



Let's go work!!!

Luego puedes asignar tus datos a la suscripción.

Ne	ew dynamic sul	×
0	Connect to recipient data Select and filter data	Map your data Define the filter applied to the reports sent in this subscription.
	Email details Map your data	Dynamic filters 0 + Add Blor Report field Value
	Schedule	Report nea value Ase Industries.Industry Employee Training Data.Categ III
C	Review and finish	

Let's go work!!!

You can then assign your data to the subscription.

New dynamic sul	bscription
 Connect to recipient data Select and filter data 	Schedule Send this email out on a recurring schedule.
Email details Map your data Schedule Review and finish	Start date End date 7/1/2024 Select a date Papeat* Daty Daty Select a data I S > PM > The score (JAC 0800) Pacific Time (US and Caned of the score of the



Benefits and advantages.

- Automation of reports: It allows automatic report delivery on scheduled times, saving time and resources by avoiding manual processes.
- Data personalization: Recipients receive only the information that is relevant to them, tailored according to filters such as region, role, or department.
- Improved collaboration: By offering personalized reports, collaboration among team members is enhanced, aligning the information with their specific needs.
- Flexible formats: Reports can be sent in various formats, such as PDF or PowerPoint, or include a direct link to Power BI for greater accessibility.

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