

Dynamic Subscriptions

In Power BI

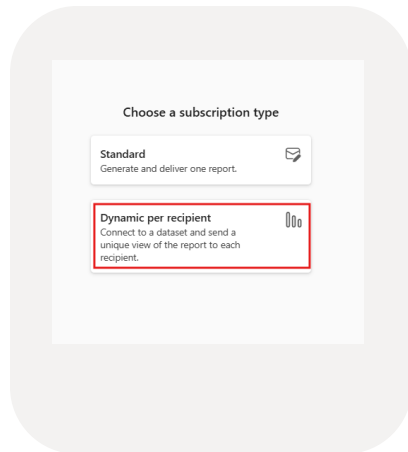
Swipe →

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.



Let's get to work!

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

New dynamic subscription

Connect to recipient data

Choose a connected semantic model with your recipients. You'll be able to map the data to this subscription's dynamic fields, such as email addresses and report parameters. [Learn more](#)

Filter by keyword

Name	Owner	Refreshed	Location	Embursement	Sensitivity
Regional Sales Sample	Nirupama Srinivasan	6/13/24, 2:55:54 PM	Blog/Workspace	—	Non-Business
Employee Training Data	Nirupama Srinivasan	5/9/24, 1:55:15 PM	My Workspace	—	Confidential/M...
25/05/141	Rohit Patkar	10/02/1, 9:41:06 AM	_Jbacktable	—	Public
Northwind	Rohit Patkar	3/10/23, 11:52:26 A...	_QuickTable	—	Confidential/M...
Customer Profitability Sample	Hung-Wen Chen	12/1/21, 1:02:09 PM	_QuickTable	—	—
GetIt	Rohit Patkar	1/04/23, 10:11:54 A...	_Daily	—	Confidential/M...
venkatesh_learning_kaj_to_job	V Venkatesh	7/16/24, 10:00:00 AM	FBIBrivoContentTable	—	Confidential/M...

Next

Let's go work!!!

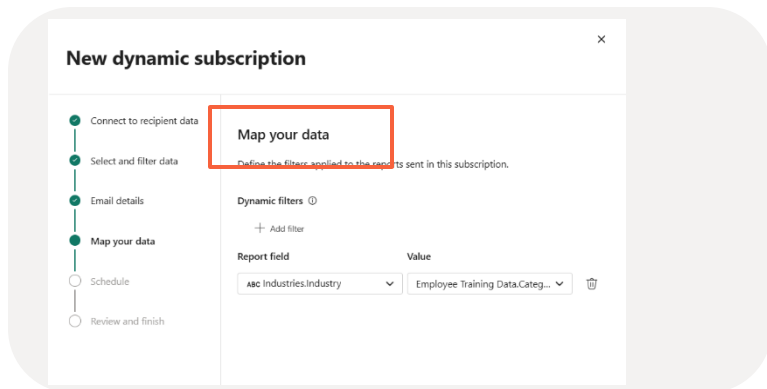
You can select the email addresses of the recipients and the subject of the email from the dataset you connected to by selecting "Get Data."

The screenshot shows the 'Email details' configuration interface. On the left, a progress bar indicates the current step is 'Email details'. The main configuration area includes:

- Subscription name:** Sales Overview
- Recipients:** A dropdown menu is open, showing 'Enter manually' and 'Get from data' (highlighted with a red box). A secondary dropdown menu is visible, listing data fields: 'Employee Training Data.Employee Name', 'Employee Training Data.Manager Name', 'Employee Training Data.Email', and 'Employee Training Data.Status'.
- Message:** Include an optional message
- Report page:** Sales Overview
- Link to report in Power BI:** Enabled (toggle)
- Report page preview:** Enabled (toggle)
- Data Activator:** Trigger action based alerts with Data Activator
- Attach full report:** PDF

Let's go work!!!

Luego puedes asignar tus datos a la suscripción.



Let's go work!!!

You can then assign your data to the subscription.

New dynamic subscription

- Connect to recipient data
- Select and filter data
- Email details
- Map your data
- Schedule**
- Review and finish

Schedule

Send this email out on a recurring schedule.

Start date * 7/18/2024

End date Select a date

Repeat * Daily

Scheduled time * 2 15 PM

Time zone * (UTC-08:00) Pacific Time (US and Cana...

Emails will be sent daily at 02:15 PM (UTC-08:00) Pacific Time (US and Canada) starting Thursday, July 18, 2024.

Active subscription

To schedule this subscription, turn on this setting. Turning it off will pause the subscription for all recipients.

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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ARTICLE**



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