

Automating Power BI Reports via Email Subscriptions

Overview

Power BI subscriptions allow users with the BrightWork Project Manager or BrightWork PMO Manager security role to automatically receive and distribute updates from key reports without needing to log into BrightWork 365 or Power BI manually. With subscriptions, you can schedule reports to be emailed at regular intervals (e.g. daily, weekly), ensuring stakeholders always have the latest insights.

When to Use This

Use Power BI email subscriptions when you want to:

- Automatically send **project or portfolio updates**
- Share **PDF or snapshot reports with stakeholders**
- Reduce manual effort in exporting and emailing reports
- Keep non-Power BI users informed

Prerequisites

Before setting up a subscription, please ensure:

- You have access to the Power BI report
- You are using Power BI Service (Browser and not Desktop)
- You have one of the following licenses:

Power BI Pro

1. Allows you to create subscriptions
2. Sends a single report page as an embedded image within the email
3. Does not support full report attachments

Power BI Premium (or Premium capacity)

1. Allows you to create subscriptions with enhanced delivery options
2. Supports sending the full report as an attachment (e.g., PDF or PowerPoint)

3. Better suited for distributing complete reports to stakeholders

Note The report is published to a Power BI workspace.

Step-by-Step: Create a Power BI Email Subscription

1. Open the Report

- Navigate to Power BI Service.
- Open the report you want to subscribe to.

2. Click "Subscribe"

- In the top menu, select **Subscribe**.

3. Create a New Subscription

- Select **Create a subscription**.
- Provide a clear name (e.g., *Weekly Project Portfolio Report*).

4. Add Recipients

- Add one or more email addresses.
- Ensure recipients have access to the report (if sending links).

5. Configure Report Delivery

Set the following options:

- Report Page
 - Choose which page to include.
- Format
 - Email snapshot (default).
 - Optional attachment:
 - PDF
 - PowerPoint
- Email Subject / Message
 - Provide context for recipients

Power BI emails include:

- A snapshot image of the report
- A link to the report
- Optional file attachment

6. Set Schedule

Configure how often the email is sent:

- Frequency:
 - Daily / Weekly / Monthly / After refresh
- Time and time zone

Note Subscriptions can run automatically on a recurring schedule.

7. Save and Test

- Select **Save**.
 - Use **Run now** (if available) to test delivery.
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Example Use Cases

PMO Manager

- Weekly portfolio report sent every Monday morning.
- Monthly executive summary in PDF format.

Project Manager

- Daily issue and risk updates.
 - Milestone tracking report after each data refresh.
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Limitations and Considerations

- Creating subscriptions requires a **Power BI Pro or Premium license**.
- External recipients may require Premium capacity.
- There may be limits on:

- Number of subscriptions per report.
 - Recipients may need access permissions to view live reports.
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Best Practices

- Use clear naming conventions (e.g., "Weekly Portfolio Summary - Exec").
 - Keep reports concise (1-3 pages where possible).
 - Schedule reports at times aligned with stakeholder workflows.
 - Avoid over-subscribing users to too many reports.
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Using This with BrightWork 365

- Apply subscriptions to:
 - Portfolio dashboards
 - Project reporting dashboards
 - Enables users to:
 - Consume BrightWork insights without logging in
 - Share updates externally when needed
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