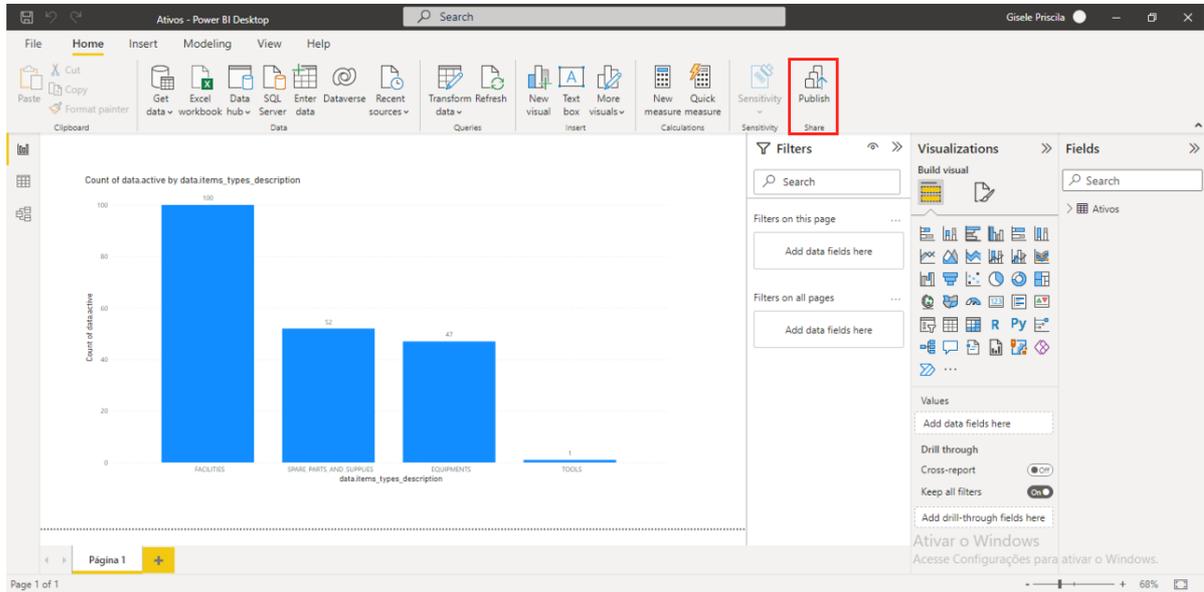


How to automatically update a PowerBI report?

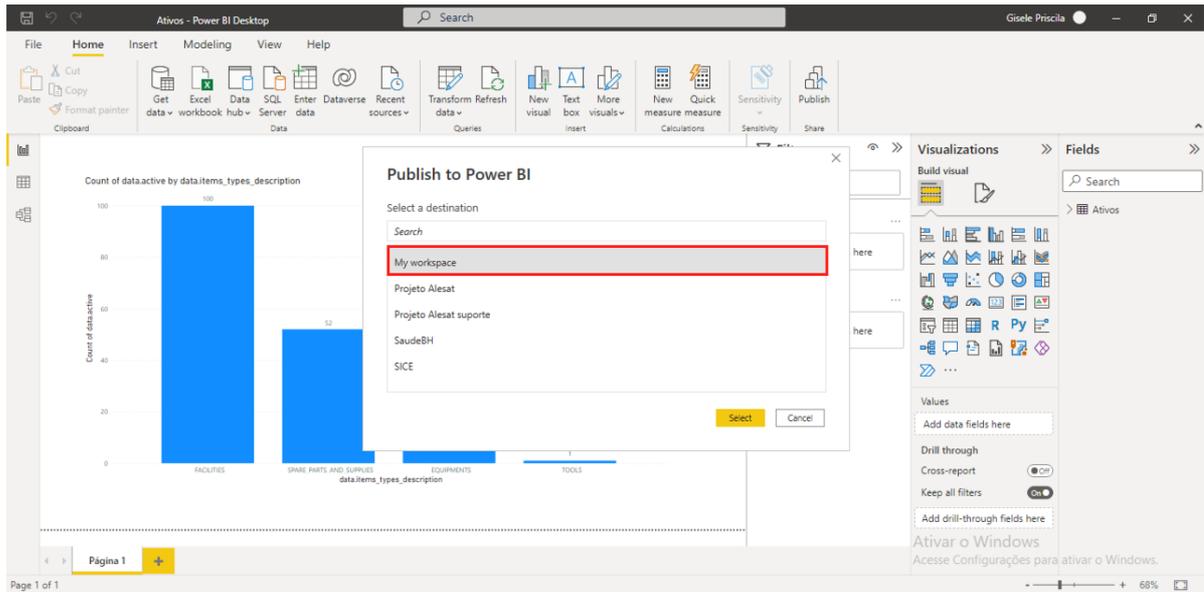
help.fracttal.com/hc/en-us/articles/25289580283021-How-to-automatically-update-a-PowerBI-report

To configure the automatic update you need to perform the following steps below:

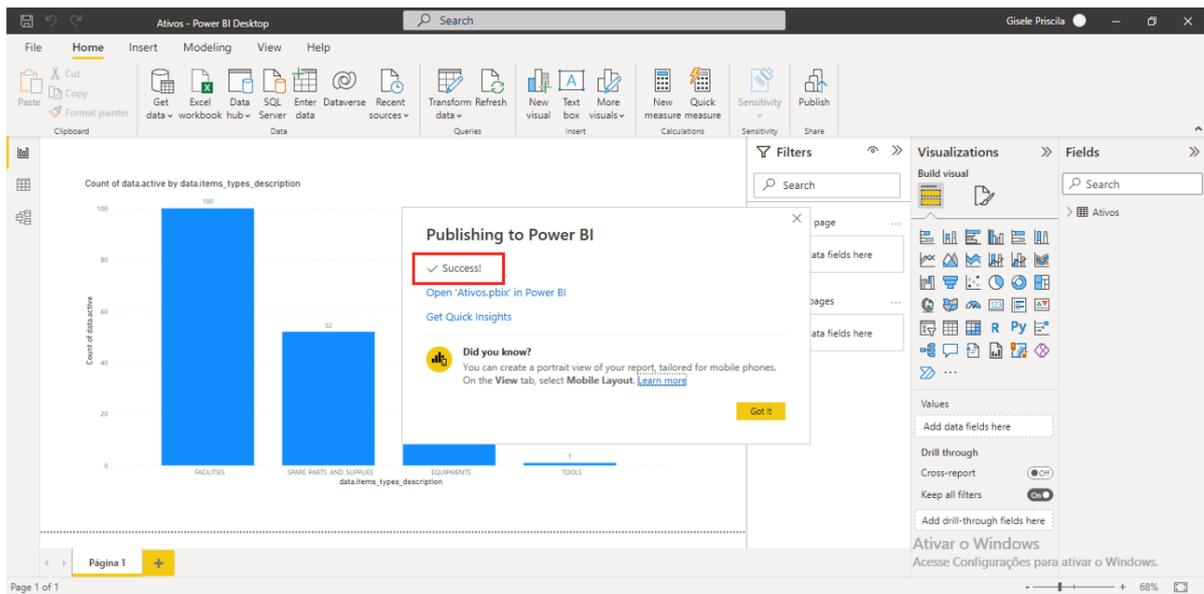
1. Open the **Project in Power BI** and click on **Publish**.



2. Choose a Workspace to publish and click "Select".

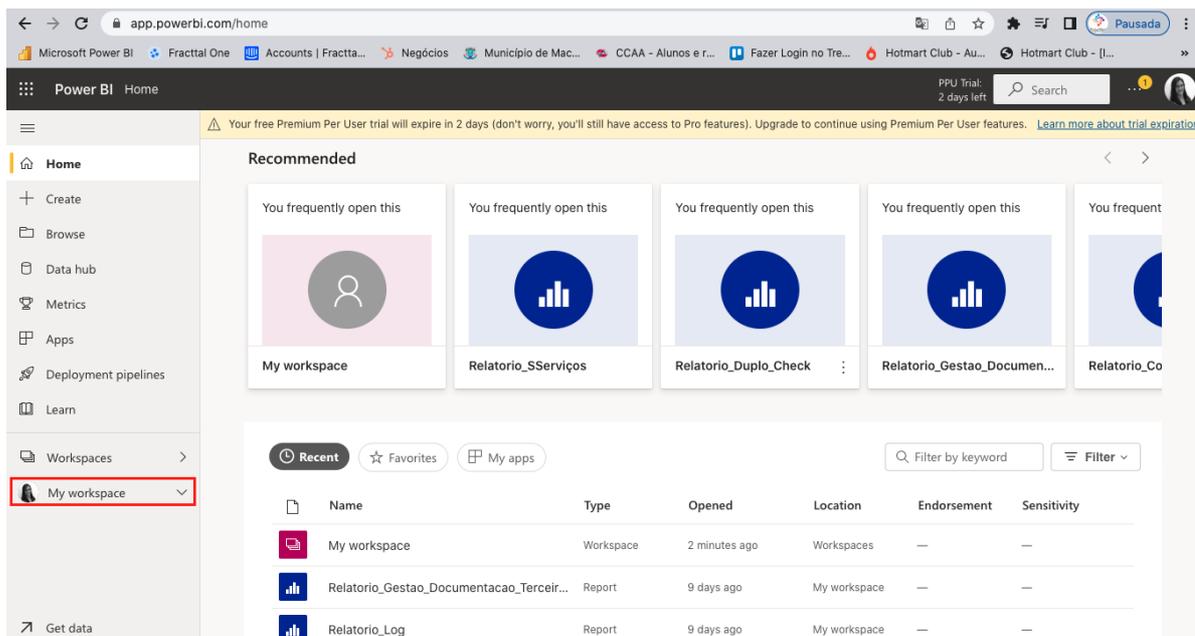


Note: then you must wait for the publishing process, when it is finished it will show the Success message as shown in the picture below.

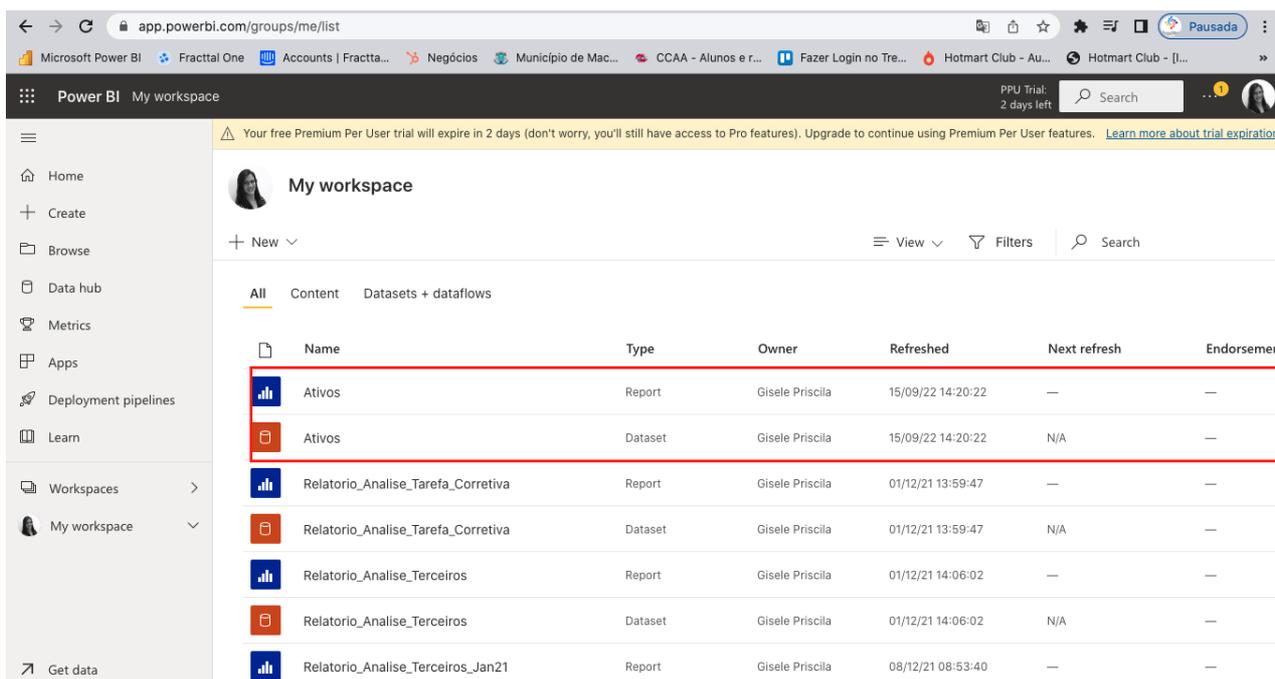


When you finish publishing you should log into Power BI on the web.

3. Open the **workspace** where you published the project.



When you open the Workspace you will soon see your published project, inside you will see the database and the report.



Now we will set up the automatic update in **Power BI Web**.

1. Click on the button to schedule the update.

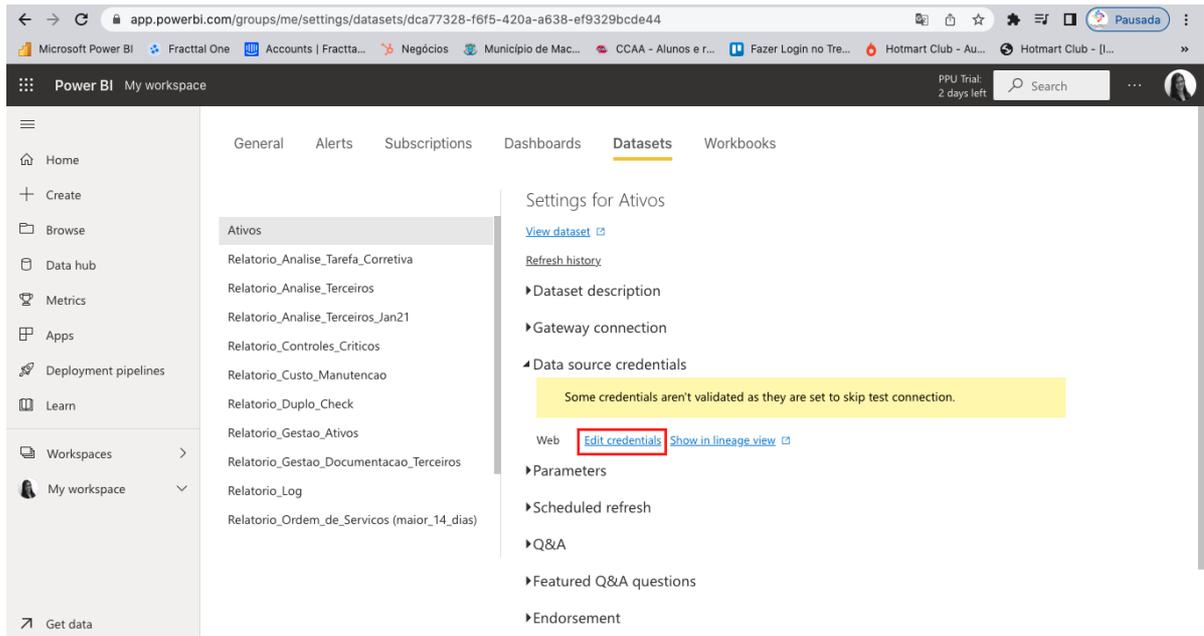
The screenshot shows the Microsoft Power BI interface. The left sidebar contains navigation options like Home, Create, Browse, Data hub, Metrics, Apps, Deployment pipelines, Learn, Workspaces, My workspace, and Get data. The main area displays 'My workspace' with a table of content. The table has columns for Name, Type, Owner, Refreshed, Next refresh, and Endorsement. A red box highlights the 'Schedule refresh' button for the 'Ativos' dataset.

Name	Type	Owner	Refreshed	Next refresh	Endorsement
Ativos	Report	Gisele Priscila	15/09/22 14:20:22	—	—
Ativos	Dataset	Gisele Priscila	15/09/22 14:20:22	N/A	—
Relatorio_Analise_Tarefa_Corretiva	Report	Gisele Priscila	01/12/21 13:59:47	—	—
Relatorio_Analise_Tarefa_Corretiva	Dataset	Gisele Priscila	01/12/21 13:59:47	N/A	—
Relatorio_Analise_Terceiros	Report	Gisele Priscila	01/12/21 14:06:02	—	—
Relatorio_Analise_Terceiros	Dataset	Gisele Priscila	01/12/21 14:06:02	N/A	—
Relatorio_Analise_Terceiros_Jan21	Report	Gisele Priscila	08/12/21 08:53:40	—	—

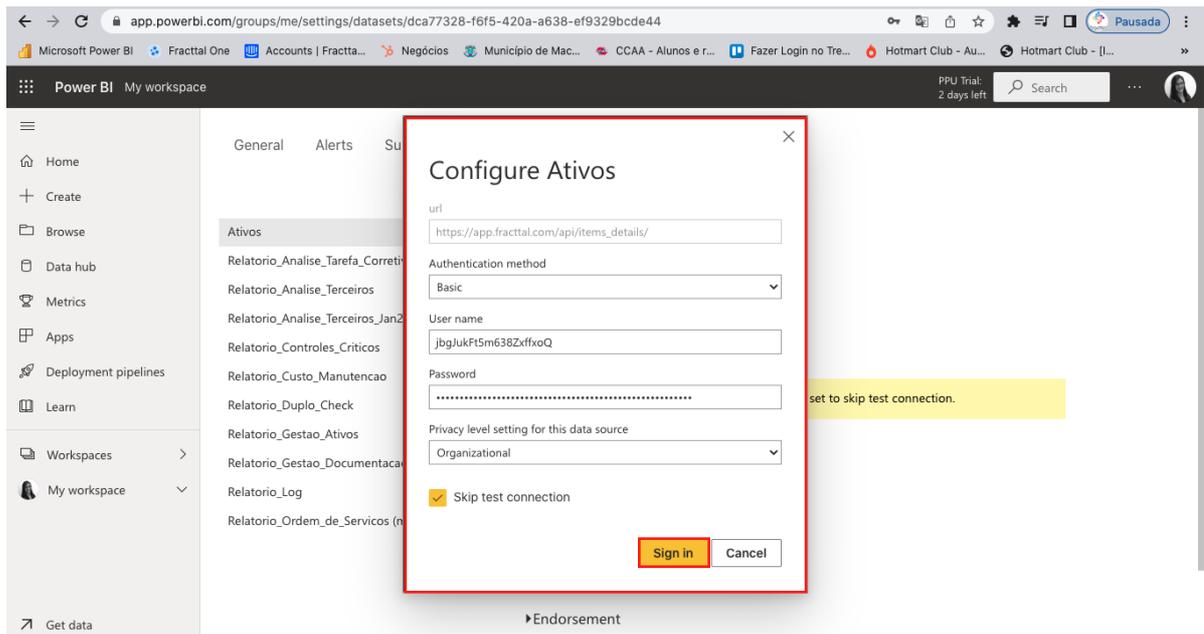
2. In datasets, open Data Source Credentials.

The screenshot shows the 'Settings for Ativos' page in Power BI. The 'Datasets' tab is selected. The left sidebar lists various datasets. The right pane shows settings for the 'Ativos' dataset, including 'Data source credentials', 'Parameters', 'Scheduled refresh', 'Q&A', and 'Endorsement'. A red box highlights the 'Data source credentials' option, and a yellow box below it contains the message: 'Some credentials aren't validated as they are set to skip test connection.'

3. Click on edit credentials.



4. Fill out the form with the API Key and API Secret information and change the privacy level setting to Organizational.



5. Go to Scheduled Refresh.

The screenshot shows the Microsoft Power BI interface. The browser address bar displays `app.powerbi.com/groups/me/settings/datasets/dca77328-16f5-420a-a638-ef9329bcde44`. The left sidebar contains navigation options like Home, Create, Browse, Data hub, Metrics, Apps, Deployment pipelines, Learn, Workspaces, and My workspace. The main content area is titled 'Parameters' and includes sections for Refresh history, Dataset description, Gateway connection, Data source credentials, and Parameters. The 'Scheduled refresh' section is highlighted with a red box and contains the following text: 'Keep your data up to date', 'Configure a data refresh schedule to import data from the data source into the dataset. [Learn more](#)', and a toggle switch labeled 'On'.

6. Fill out the form with the required information.

The screenshot shows the Microsoft Power BI interface with the 'Scheduled refresh' form filled out. The browser address bar displays `app.powerbi.com/groups/me/settings/datasets/dca77328-16f5-420a-a638-ef9329bcde44`. The left sidebar is the same as in the previous screenshot. The 'Scheduled refresh' section is highlighted with a red box and contains the following text: 'Keep your data up to date', 'Configure a data refresh schedule to import data from the data source into the dataset. [Learn more](#)', a toggle switch labeled 'On', 'Refresh frequency' set to 'Daily', 'Time zone' set to '(UTC-03:00) Brasilia', 'Time' with a link 'Add another time', and 'Send refresh failure notifications to' with checkboxes for 'Dataset owner' and 'These contacts:'. Below the 'These contacts:' checkbox, there is a text input field containing 'Gisele Priscila' and a placeholder 'Enter email addresses'. At the bottom of the form are 'Apply' and 'Discard' buttons.

Note: You can choose the weekly update option and choose on which days the update will occur.

7. Set the time when the update will take place.

The screenshot shows the Microsoft Power BI settings page for a dataset. The browser address bar displays the URL: `app.powerbi.com/groups/me/settings/datasets/dca77328-f6f5-420a-a638-ef9329bcde44`. The page title is "Power BI My workspace". The left sidebar contains navigation options: Home, Create, Browse, Data hub, Metrics, Apps, Deployment pipelines, Learn, Workspaces, and My workspace. The main content area is titled "Keep your data up to date" and includes a toggle switch set to "On". Below this, the "Refresh frequency" is set to "Daily", the "Time zone" is "(UTC-03:00) Brasília", and the "Time" is set to "8:00 AM". The "Send refresh failure notifications to" section is checked, and an email address "Gisele Priscila" is entered. The "Apply" button is highlighted in yellow. A red box highlights the "Refresh frequency", "Time zone", and "Time" settings.

Note: You can set an e-mail address to receive notification in case of update errors.