

PBRS Internal Evaluation Guide

Internal material for evaluating reporting automation

These sheets explain what PBRS does, the business value it can bring, and the questions an organization should answer before adopting it. They are designed to be shared with a manager, IT, security, operations, and procurement.

What PBRS is

PBRS is an installed Windows application for automating reporting workflows across supported Power BI, Power BI Report Server, paginated-report, and SSRS environments. It can schedule or trigger a workflow, refresh supported datasets, generate report outputs, apply recipient-specific rules, and deliver the finished files to approved destinations.

When it is useful

Native subscriptions and simple automation are often sufficient for a small, standard reporting task. PBRS is most useful when the workflow has recurring operational requirements: varied schedules, many recipients, different filters or parameters, multiple output formats or destinations, external delivery, document controls, refresh dependencies, or a need for central administration and execution history.

What to validate before a decision

Deployment	The Windows server or service environment, service account, report sources, and delivery destinations that will be used.
Security	The recipient data model, access controls, file handling, destination permissions, and any document-protection requirements.
Administration	Who will own schedules, recipient data, exception handling, notifications, updates, and review of execution history.
Procurement	The defined workflow, scope of use, implementation ownership, required approvals, and the success criteria for evaluation.

Each sheet proposes a practical evaluation path. The outcome should be a decision based on one representative workflow, rather than a generic product demonstration.

1 Power BI Scheduler

Automate recurring Power BI report delivery

The business need

Teams often rely on simple subscriptions or manual exports for scheduled reporting. That approach becomes difficult to manage when schedules follow business calendars, deliveries go to different places, or exceptions require attention.

What PBRS does

- Run reports hourly, daily, weekly, monthly, or on custom business and fiscal calendars.
- Start reporting after a qualifying business event, such as a database change, file event, unread email, or monitored data event.
- Export and deliver the completed report in the required format and destination without repeated manual steps.
- Use notifications, configured retries, exception handling, and execution history for unattended operations.

Practical example

A finance team can run a monthly close package on the third business day, exclude blackout dates, refresh the required data first, and deliver the final outputs to the appropriate internal locations.

Value to the organization

The organization gains a repeatable reporting process with defined timing, ownership, and visibility when something needs attention.

Questions for IT security administration and procurement

Confirm the report source, calendar rules, service account, destinations, exception path, and administrator responsible for the schedule.

Suggested evaluation

Compare one recurring workflow with the present manual or subscription-based process, including its real schedule and exception rules.

2 Power BI Export to PDF

Deliver fixed report documents automatically

The business need

A static PDF is often required for executive review, operational distribution, records, or recipients who do not need interactive Power BI access. The work is not only exporting a report; it is producing, protecting, and delivering the correct document every time.

What PBRS does

- Generate supported Power BI, paginated, Report Server, or SSRS report outputs as PDF.
- Apply appropriate report filters, filenames, messages, delivery rules, and recipient-specific settings.
- Use available PDF protections such as encryption, passwords, permissions, watermarks, and expiry controls where required.
- Deliver files through approved destinations as part of a scheduled or triggered workflow.

Practical example

A regional manager receives a recurring PDF with the right territory filter, filename, and document controls, delivered after the underlying data is refreshed.

Value to the organization

The organization replaces manual export and attachment work with a controlled, repeatable document-delivery process.

Questions for IT security administration and procurement

Confirm the required report output, filters, recipients, document-protection rules, delivery destination, retention expectations, and report compatibility.

Suggested evaluation

Use a production-like report to verify the final PDF, required controls, and intended delivery destination.

3 Power BI Export to Excel

Deliver usable Excel outputs without repeated exports

The business need

Operational teams may need Excel for analysis, handoff, reconciliation, or a formal report package. The important question is what workbook each audience needs and how it will be created and delivered consistently.

What PBRS does

- Generate supported Excel outputs from report data, including visual data, summary data, underlying data, or paginated-report layouts where supported.
- Apply filters, filenames, recipient rules, and delivery destinations as part of one managed workflow.
- Assemble multi-report packages as separate attachments, ZIP files, combined PDF packages, or tabbed Excel workbooks where supported.
- Run the process on a schedule or business event and retain execution history.

Practical example

A distribution team receives a daily Excel workbook with the correct region filter and a consistent filename in its SharePoint location, without an analyst preparing files one by one.

Value to the organization

The organization standardizes a repeatable Excel-delivery process and reduces the risk of delivering an outdated or incorrectly filtered workbook.

Questions for IT security administration and procurement

Confirm the exact Excel result required, data volume, personalized filters, packaging needs, destination permissions, and support owner.

Suggested evaluation

Test one representative report with the expected Excel outcome and the real recipient or destination rule.

4 Power BI External Users

Deliver reports outside the Power BI tenant

The business need

Customers, partners, vendors, and other external recipients may need a report but should not need interactive access to the organization's Power BI environment. External delivery must address both distribution and data-governance requirements.

What PBRS does

- Generate static PDF, Excel, CSV, and other supported files for recipients who do not need to sign in to Power BI.
- Use SQL or JSON data to control each recipient's report content, filters, formats, filenames, messages, and destinations.
- Deliver multiple reports as separate attachments, a ZIP archive, a bookmarked PDF, or a tabbed Excel workbook where supported.
- Apply available document protections and use notifications, retries, and execution history for unattended delivery.

Practical example

A customer receives a monthly package containing only its own account information, delivered to its approved destination under the organization's document-handling rules.

Value to the organization

The organization can make external reporting repeatable while documenting who receives what, how data is filtered, and how finished files are protected and delivered.

Questions for IT security administration and procurement

Confirm the data-security model, recipient authority, data filters, approved destinations, file protections, retention, service-account permissions, and security-review evidence.

Suggested evaluation

Start with one approved external-recipient scenario and document acceptance criteria before broader rollout.

5 Personalized Distribution

Give every recipient the report that applies to them

The business need

A centralized report is valuable only if each person receives the data, format, and delivery route that applies to their role, region, customer, or business unit. Manual preparation becomes difficult as recipient rules multiply.

What PBRS does

- Use SQL or JSON data to define recipients, reports, filters, parameters, formats, filenames, messages, security settings, and destinations.
- Generate a different report or multi-report package for each customer, department, region, partner, or user.
- Run the workflow on a schedule or business event, with supported dataset refresh, notifications, retries, and execution history.
- Manage the process centrally instead of maintaining a separate schedule or automation branch for each person.

Practical example

A sales leader, regional manager, and external partner each receive the version of a performance report that matches their approved data scope and delivery preference.

Value to the organization

The organization can scale relevance and consistency while keeping the rules in a governed recipient and filter source.

Questions for IT security administration and procurement

Confirm the data-driver source, data ownership, filtering logic, recipient-data quality, output volume, security rules, and administration process for changes and exceptions.

Suggested evaluation

Use a small, representative recipient set to verify data, filtering, output, delivery, and exception handling.

6 Report Bursting

Generate many recipient specific outputs from one report

The business need

Report bursting turns one centrally maintained report into many filtered or parameterized outputs. It is useful when customers, departments, locations, or managers each need their own version at the same time.

What PBRS does

- Use a SQL query or JSON Data-Driver to provide recipient-specific instructions.
- Apply filters, parameters, formats, filenames, messages, security settings, and destinations dynamically for each output.
- Generate individual reports or recipient-specific report packages from one centrally managed workflow.
- Use schedules or business events, supported dataset refresh, notifications, configured retries, and execution history for unattended operation.

Practical example

A national organization produces a separate weekly performance report for each branch, with the correct data, file name, and delivery destination for every branch.

Value to the organization

The organization avoids manual report assembly and avoids creating one separately maintained schedule or automation branch for every recipient or entity.

Questions for IT security administration and procurement

Confirm the burst key, recipient or entity data, expected volume, filters and parameters, delivery rules, job duration, exceptions, and administrator responsibilities.

Suggested evaluation

Pilot one report across a representative set of entities, including an incomplete-data or failed-delivery exception.

7 Reports After Dataset Refresh

Deliver reports after the latest data is ready

The business need

A report is only useful if it is delivered after the required data has refreshed successfully. When refresh, completion monitoring, report generation, and distribution are separate steps, teams may have to build and monitor a complex process.

What PBRS does

- Refresh supported Power BI datasets or semantic models as part of a report-export schedule or as an independent workflow.
- Wait for completion before generating reports and deliver the finished outputs using the defined recipient and destination rules.
- Use notifications and configured error behavior when a refresh fails or a workflow requires attention.
- Coordinate refresh, report generation, packaging, and delivery in one administered workflow when the process requires it.

Practical example

An operations team refreshes the data that drives a morning report, waits for completion, then delivers the new report to managers rather than sending yesterday's figures.

Value to the organization

The organization can make data freshness an explicit part of the reporting process rather than a manual check or a separate set of automation steps.

Questions for IT security administration and procurement

Confirm the reporting environment, supported refresh options, source and dataset, completion criteria, wait behavior, failure notifications, downstream report scope, and administrator ownership.

Suggested evaluation

Test the entire sequence using one real dataset and report, including the behavior for a failed or late refresh.

8 Power BI Automation Without Power Automate

Automate a reporting workflow without building a complex flow

The business need

Power Automate can be appropriate for a simple report-export task. As a reporting workflow acquires schedules, events, data refresh, personalization, packages, document security, varied destinations, monitoring, and recovery rules, it can become a development and maintenance project.

What PBRs does

- Configure reporting-specific schedules, business-event triggers, dataset refresh, report generation, packaging, delivery, and notifications in PBRs.
- Create standard or data-driven report packages with recipient-specific reports, filters, formats, security settings, and destinations.
- Produce separate attachments, ZIP files, bookmarked PDFs, or tabbed Excel workbooks where supported.
- Use execution history, notifications, configured retries, and exception handling for unattended reporting operations.

Practical example

A BI team replaces a multi-step reporting flow with an administered workflow that refreshes the required dataset, generates personalized outputs, assembles the required package, and delivers it through approved routes.

Value to the organization

The organization can evaluate whether a purpose-built reporting workflow is easier to operate and govern than extending a collection of connected automation actions.

Questions for IT security administration and procurement

Map the existing process, including credentials, ownership, export and capacity dependencies, exceptions, destinations, security controls, and monitoring. Retain simple native or Power Automate approaches where they are sufficient.

Suggested evaluation

Choose the most operationally complex recurring workflow and compare the current maintenance burden with a PBRs proof using the same requirements.