Scheduling data refreshes

Refreshing data in Power BI Report Server comes with a lot more caveats than using the Power BI cloud service. For example, refreshing is contingent on the data source that the report is using. Since you've installed this server inside your firewall, there's no need for a data management gateway to refresh the data either. As you create refreshing schedules, the server will simply create SQL Server Agent jobs to control the refreshes, such as Reporting Services.

If you plan on refreshing data sources that are derived from files, make sure you use a network path for that file (\computername\sharename\file.csv), not a local path (such as C:\Downloads\File.csv). You can do this in Power BI Desktop by going to the **Home** ribbon and selecting **Edit Queries | Data Source Settings**. Click **Change Source** and change any file references to a network path, such as \MyComputer\c$\Downloads\File.csv.

Once you do that, publish the report to the server again. Then, select the report and select **Manage**. For most data sources, you will need to confirm the source of the data in the **Data Sources** tab. For flat files, confirm that you see the network path and type in the credentials for the machine that's holding those files. This will need to be a Windows Authentication username and password. Click **Test Connection** to confirm that a connection can be successfully achieved. If it tests successfully, click **Save**.

If you find that there are popular times at which people want to refresh data, you can create shared schedules. Shared schedules can be found in the **Site Settings** administration panel (under the gear in the top-right corner) of the portal. By creating these, you will simplify the scheduling of future jobs for popular scheduled times.

To schedule the refresh, click **Scheduled Refresh** in the report management area. Then, click **New Scheduled Refresh Plan** to create a new schedule. You can also use a shared schedule resource or a one-off schedule. Simply type the time you wish the refresh to occur and the refresh interval. While there are workarounds, the lowest grain of a scheduled refresh is typically hourly.

End-of-Lesson

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