

WEBINAR

APOS PowerBurst Publisher

Automated Report Generation & Distribution



PowerBurst

Expand the reach of Power BI

Today's Session – Key Topics

- Information Recipients - Internal & External
- Generation & Distribution of Reports
- Process Timing & Triggers
- Multi-Platform Report Bursting
- Agentic AI & Proactive Intelligence

- Q&A – see webinar console



HOUSEKEEPING



You will have
access to the
slides via email



You will get the
recording
within 24 hours



Download
the **handouts**
in the panel

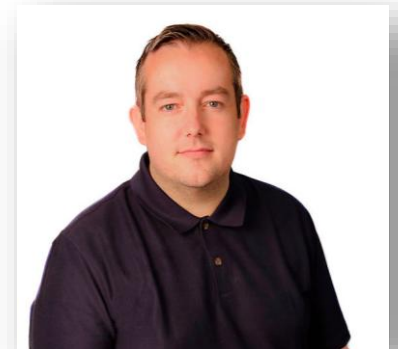


Tell us how
we did in
the **survey**

Today's Presenters



ALLAN PYM



ALAN GOLDING

Who is APOS?



PowerBurst

- Formed in 1992
- Software solutions for BI & Analytics
 - Simplify, automate & extend
- Report publishing
- Data connectivity
- Platform management
- Strategic SDK development and consulting
- Hundreds of customers globally

PROUD SPONSOR OF

FABCON
Microsoft Fabric
COMMUNITY CONFERENCE

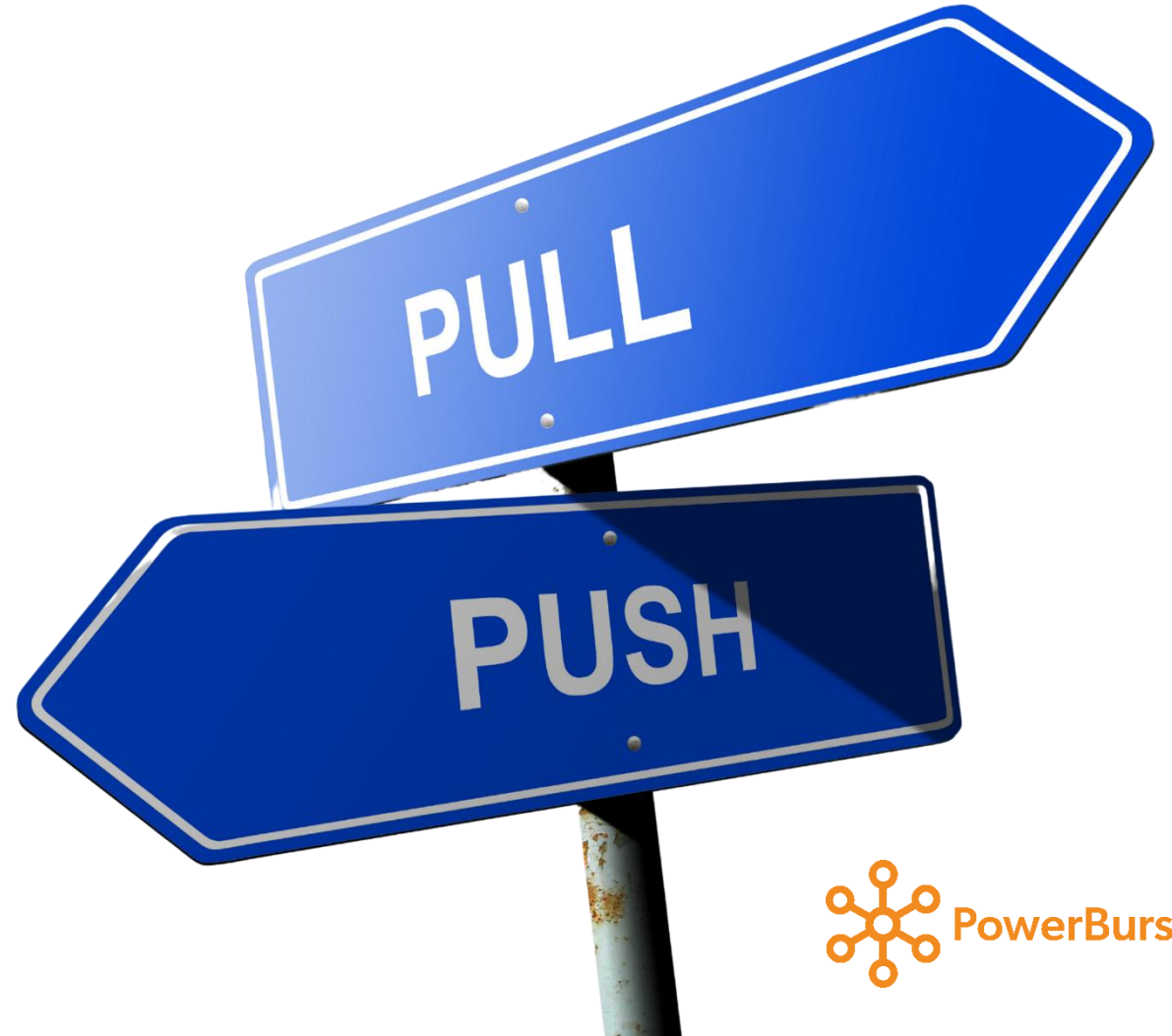
SQLCON
Microsoft SQL
COMMUNITY CONFERENCE

ATLANTA MARCH 16 - 20, 2026

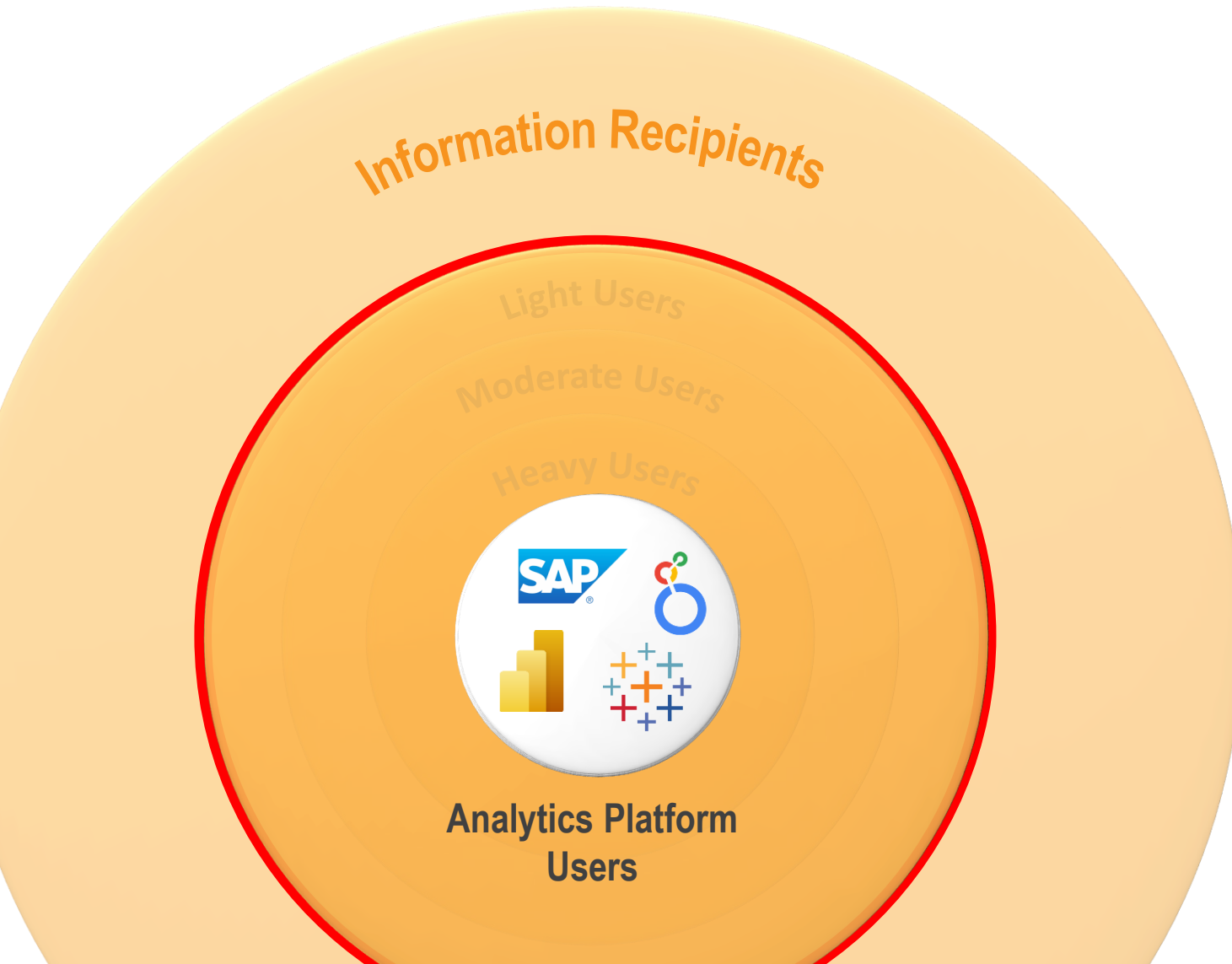


PowerBurst

Report Information Access



Report Information Access

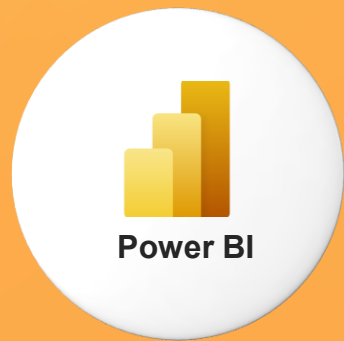


Information Recipients

- Many other report needs exist beyond Analytics Platform Users
- Push distribution is required if there is no analytics platform access

External Recipients

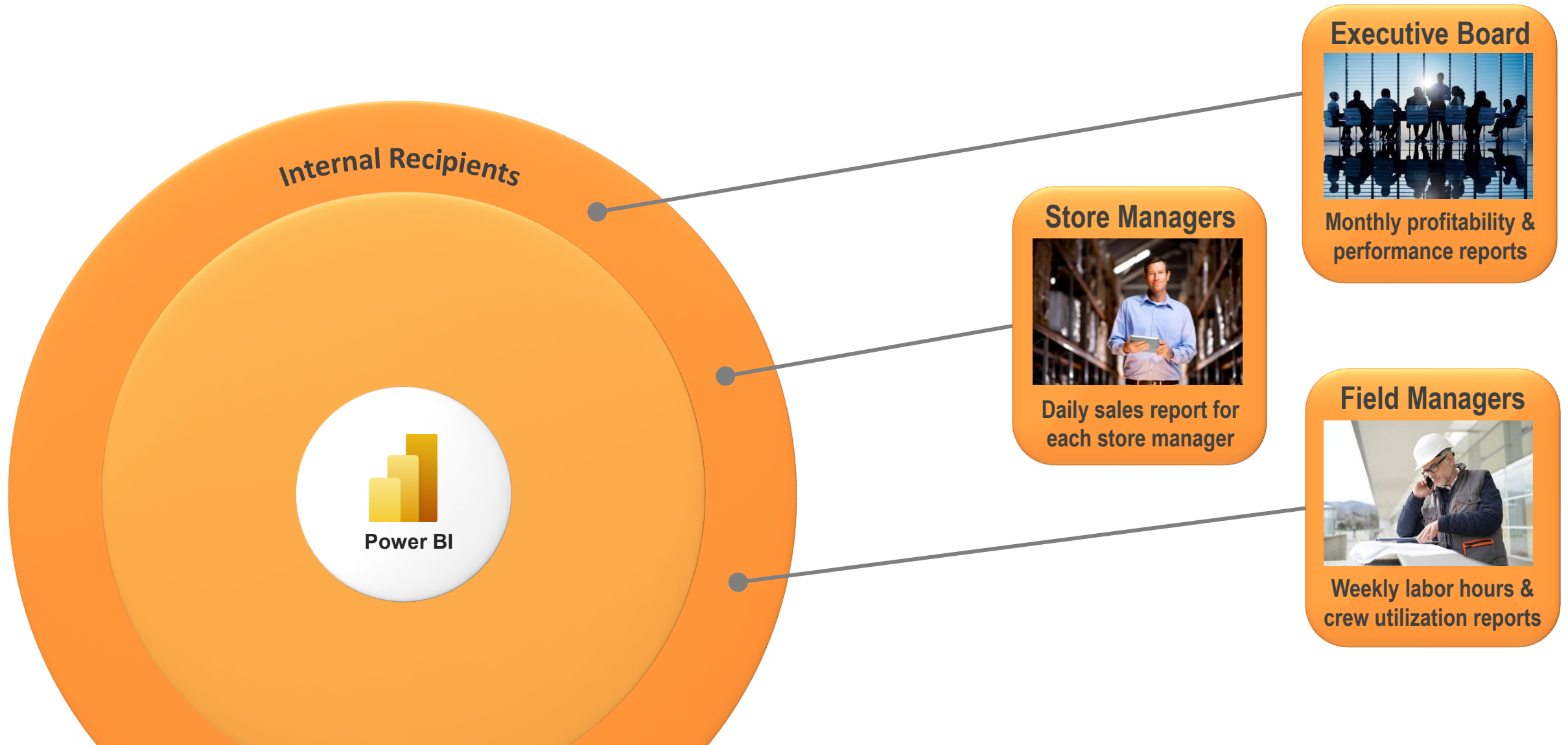
Internal Recipients



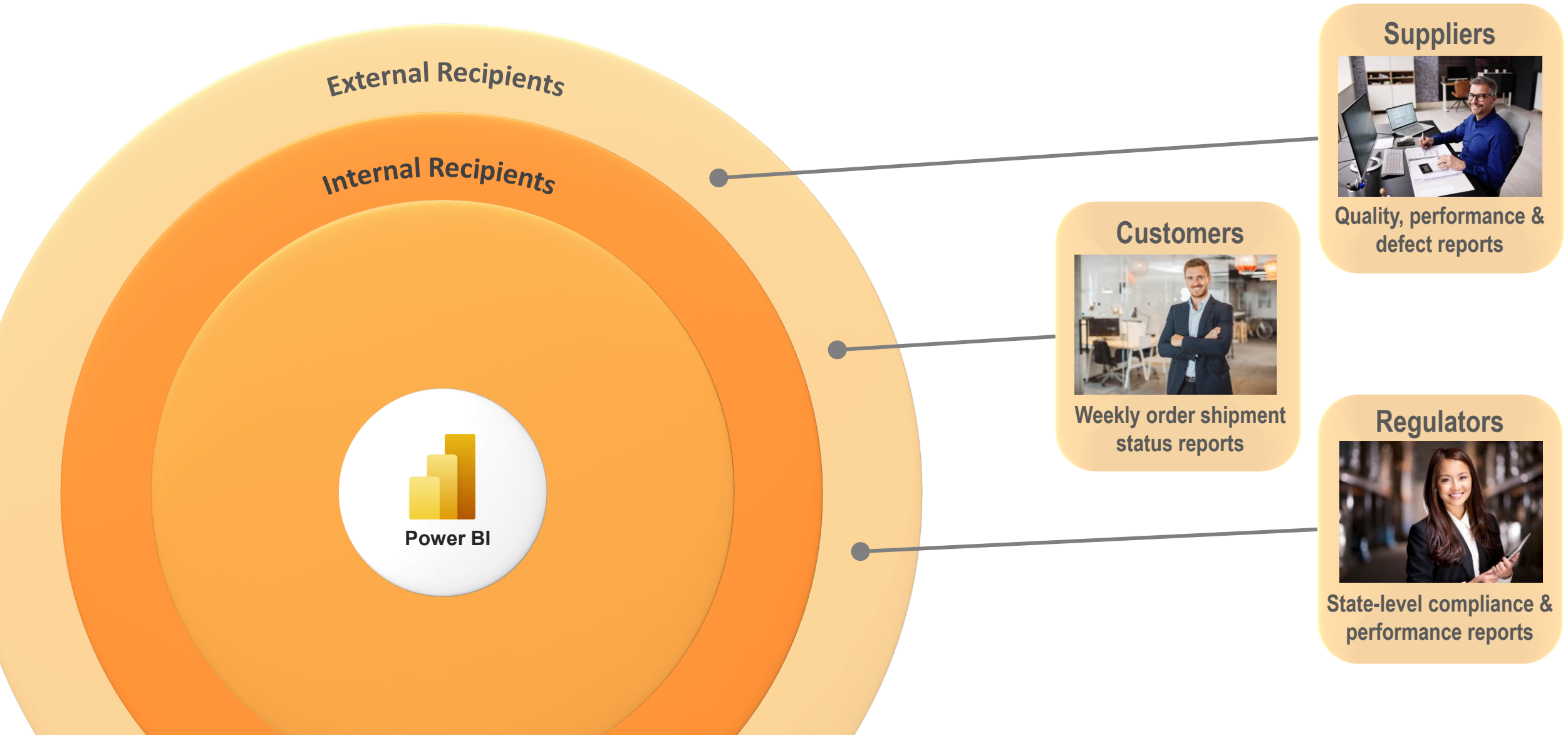
Power BI

**Analytics Platform
Users**

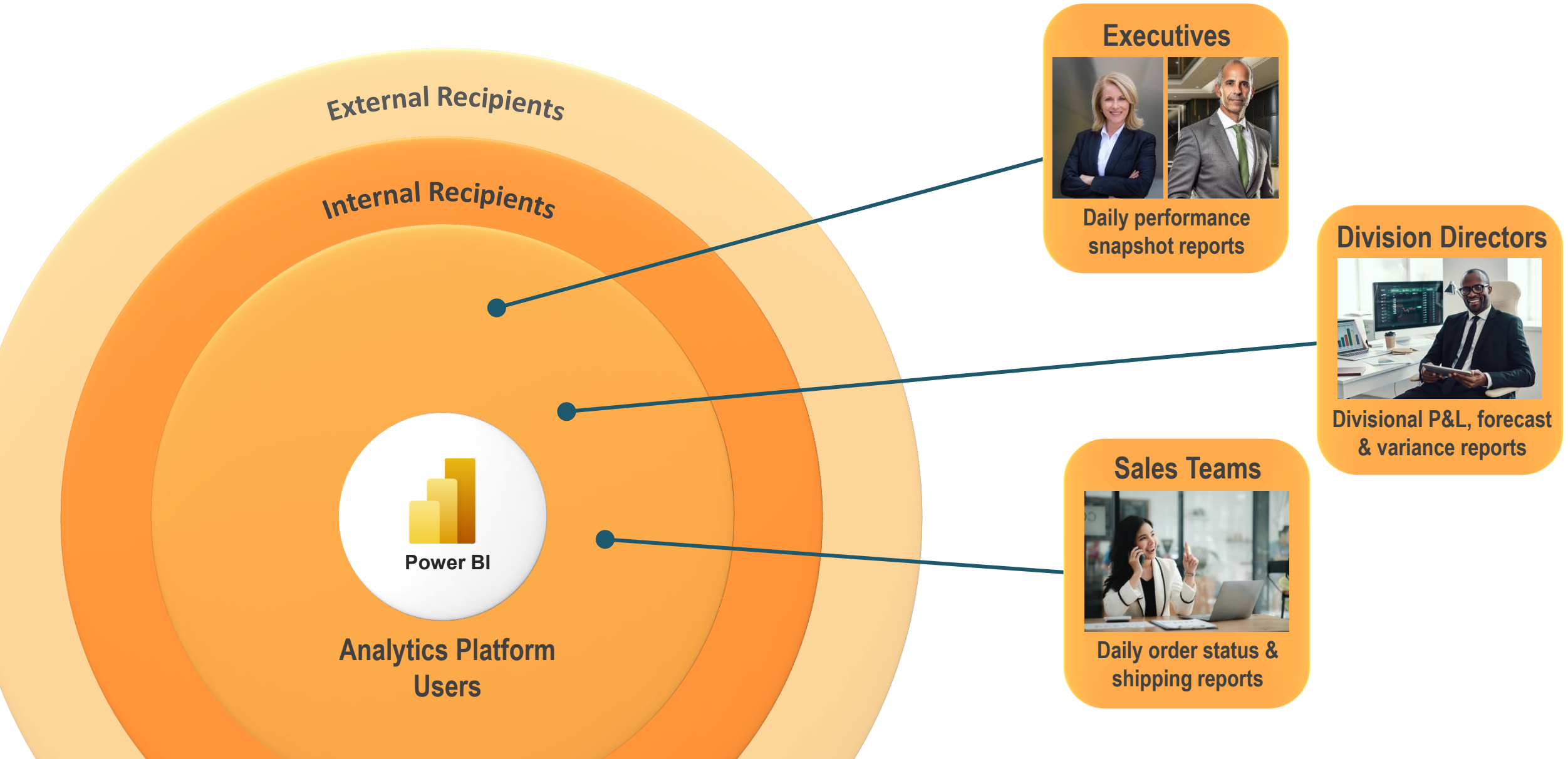
Report Distribution – Internal Recipients



Report Distribution – External Recipients



Report Distribution – Platform User Recipients



Common Report Distribution Factors

Unified Information Needs

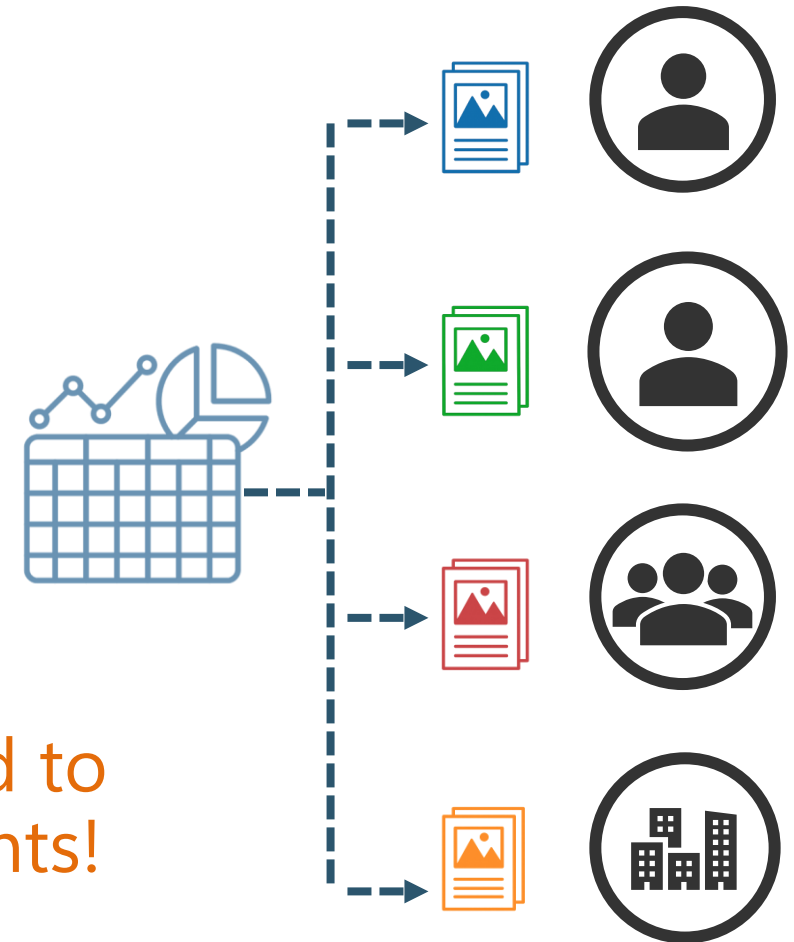
- Strategic teams or large user networks require similar information

Consistent & Predictable Cycles

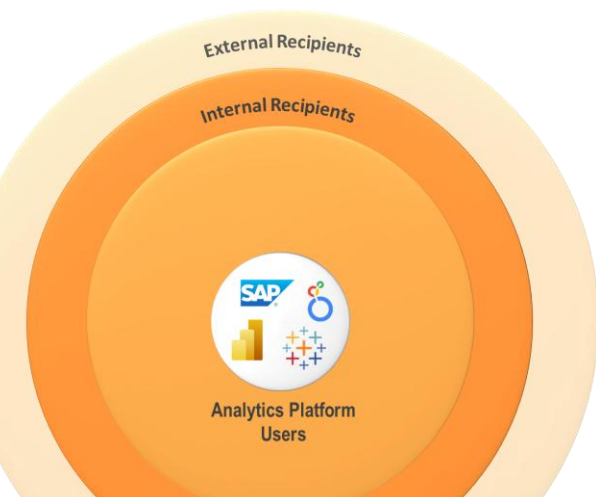
- Information needed at a specific time
- Recurring need (hourly, daily, weekly, monthly, quarterly)

Personalized Reports

- Each recipient to receive a report version specific to them



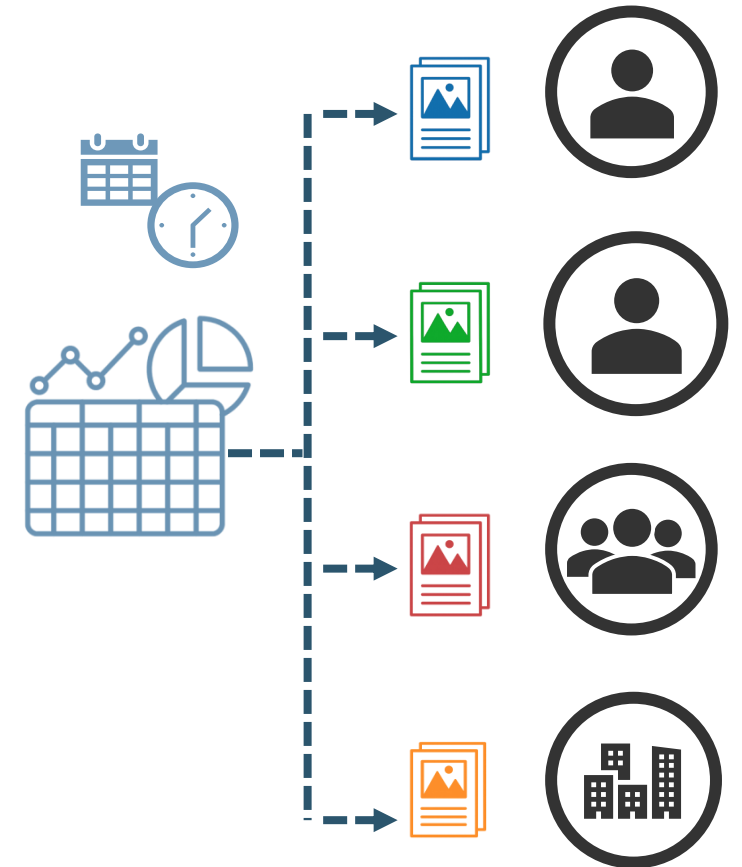
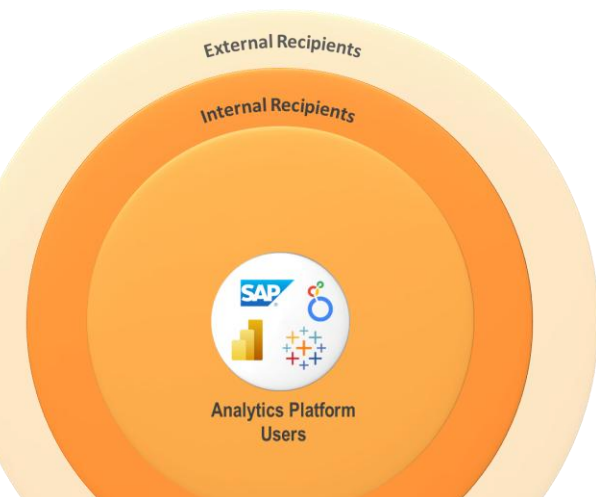
Automation is required to meet these requirements!



Report Distribution Challenge

Analytics Platforms Limitations

- No push capabilities
- Push only to platform users
- Volume limits
- Timing limits
- Format limits
- No dynamic processes



APOS PowerBurst Publisher

PowerBurst Publisher is a software solution that automates the generation of personalized versions of reports and then distributes the reports out to targeted users and locations.

Automated Report Generation – the right report content

Automated Report Distribution – to the right people

Automated Process Timing – at the right time



Supported Platforms:

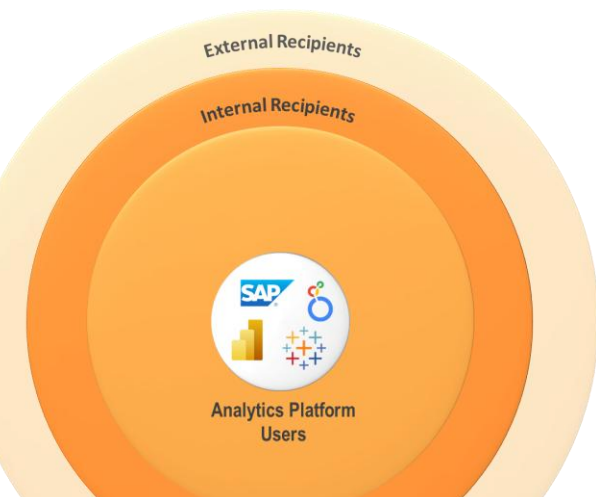
- **Power BI**
- SAP Analytics Cloud
- SAP Analysis for Office
- Tableau
- Google Looker



Alan Golding
Solution Consulting Manager
APOS

PowerBurst Scenario: Blue Fern Inc.

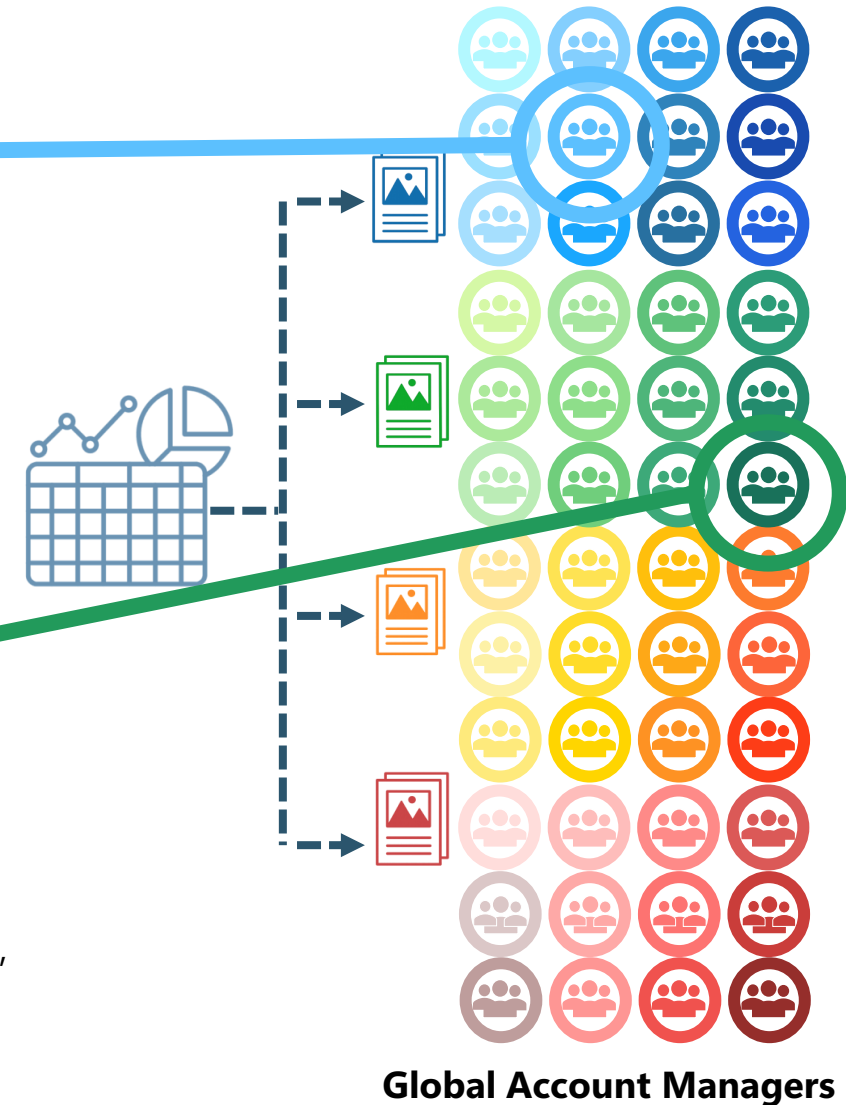
- Blue Fern Vendor Account Managers global team
- Weekly Vendor Accounts Payable report
- Vendor account status & action priorities
- Report data filtered for each Account Manager
- PowerBurst generates and sends a personalized report to each Vendor Account Manager every Tuesday morning



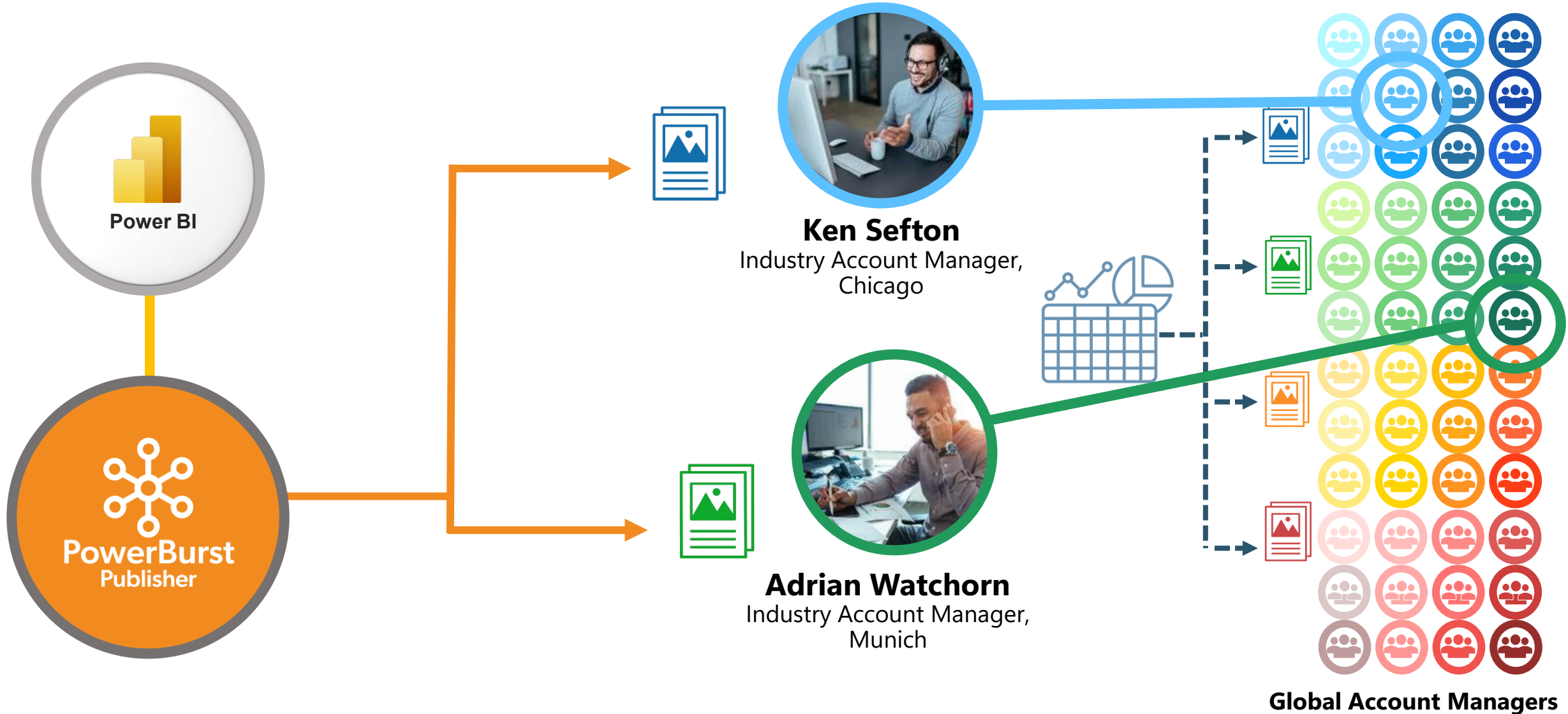
Ken Sefton
Industry Account Manager,
Chicago

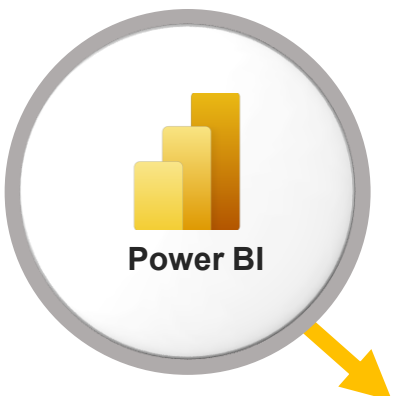


Adrian Watchorn
Industry Account Manager,
Munich

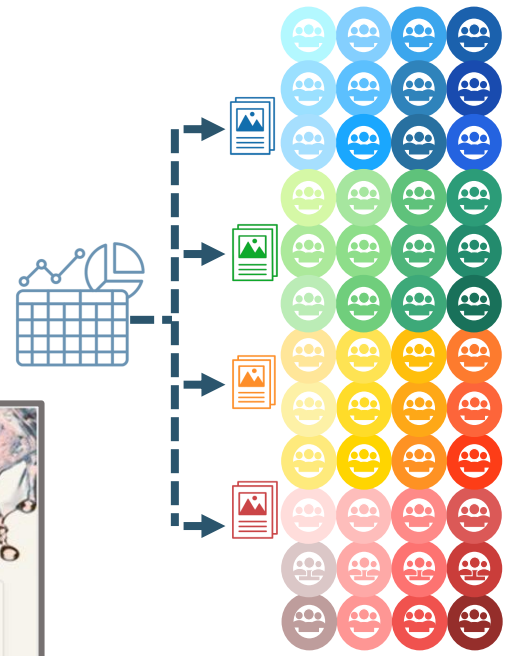


Report Distribution Scenario: Blue Fern Inc.






In Power BI: All Accounts




Global Account Managers



Accounts Payable- Section

Analysis by Account Manager



Account Manager

Adrian Watchorn

Benjamin Twilley

AP status by Vendors

| Vendor Type | Vendor | Country | Debit Amount GC | Paid GC | Due GC | Debt Cover: |
|------------------------------|---------------------------|-------------|---------------------|---------------------|---------------------|-------------|
| Financial Institution | Apex Banking Corporation | Italy | 2,865,576.32 | 2,041,242.14 | 824,334.18 | 71 |
| Advertising & Media Agencies | EchoPulse Media | Philippines | 53,022.30 | 43,337.54 | 9,684.75 | 81 |
| Raw Material Supplier | EuroFlavor Extracts | Brazil | 467,776.90 | 395,497.81 | 72,279.09 | 84 |
| Raw Material Supplier | HerbAloe Natural Extracts | Germany | 2,947,406.41 | 2,557,092.10 | 390,314.31 | 86 |
| Financial Institution | Sterling Global Finance | USA | 3,190,438.54 | 2,495,561.71 | 694,876.83 | 78 |
| Total | | | 9,524,220.48 | 7,532,731.31 | 1,991,489.17 | 79. |

Geo-Situation of Debt and Coverage %

Debt and Coverage by Country
in k USD

Country: USA, Germany, Italy, Brazil, Philippines

| Country | Debt (k USD) | Coverage (k USD) |
|-------------|--------------|------------------|
| USA | 3,190K | 2,495K |
| Germany | 2,947K | 2,557K |
| Italy | 2,865K | 2,041K |
| Brazil | 467K | 395K |
| Philippines | 53K | 43K |

Payment Term situation

| Payment Terms | Percentage |
|---------------|------------|
| Over 90 | 54.06% |
| Net 90 | 15.6% |
| Net 30 | 15.22% |
| Net 60 | 15.13% |



Power BI



PowerBurst
Publisher

Weekly Accounts Payable for Ken Sefton- Central Finance

Delete Archive Report Move to Reply Reply all

Weekly Accounts Payable for Ken Sefton- Central Finance

From : centralfinance@bluefern.com
To : ken.sefton@bluefern.com

Ken Sefton



Accounts Payable- Section

Analysis by Account Manager

Account Manager **Ken Sefton**

Ken Sefton
Lavla Dranfield

AP status by Vendors

| Vendor Type | Vendor | Country | Debit Amount GC | Paid GC | Due GC | Debt Cover: |
|------------------------------|---------------------------|-------------|---------------------|---------------------|---------------------|-------------|
| Financial Institution | Apex Banking Corporation | Italy | 2,865,576.32 | 2,041,242.14 | 824,334.18 | 71 |
| Advertising & Media Agencies | EchoPulse Media | Philippines | 53,022.30 | 43,337.54 | 9,684.75 | 81 |
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| Total | | | 9,524,220.48 | 7,532,731.31 | 1,991,489.17 | 79. |

Debt and Coverage by Country

in k USD

Country USA Germany Italy Brazil Philippines

Geo-Situation of Debt and Coverage %

Payment Term situation



Power BI



PowerBurst
Publisher

Weekly Accounts Payable for Adrian Watchorn - Central Finance

Delete Archive Report Move to Reply Reply all

Weekly Accounts Payable for Adrian Watchorn - Central Finance

From : centralfinance@bluefern.com
To : adrian.watchorn@bluefern.com

Adrian Watchorn



BlueFern 955 KB

Accounts Payable- Section

Analysis by Account Manager

Account Manager **Adrian Watchorn**

Hi Adrian,

Here is your report for the week of 2023-09-18 to 2023-09-24

Any further questions, please contact me.

Central Finance
Blue Fern

AP status by Vendors

| Vendor Type | Vendor | Country | Debit Amount GC | Paid GC | Due GC | Debt Coverage |
|-----------------------|-------------------------|--------------|----------------------|---------------------|---------------------|---------------|
| Packaging Supplier | ApexPack Industries | Costa Rica | 5,383.83 | 3,419.76 | 1,964.07 | 63.5% |
| Packaging Supplier | DuraBox International | Poland | 631,005.71 | 442,563.28 | 188,442.44 | 70.1% |
| Packaging Supplier | EcoLid Containers | Italy | 3,220,807.90 | 2,280,293.38 | 940,514.52 | 70.8% |
| Raw Material Supplier | NutriBase Stabilizers | South Africa | 133,282.51 | 103,522.72 | 29,759.78 | 77.7% |
| Financial Institution | Oakmont Financial Group | Thailand | 66,773.87 | 51,751.04 | 15,022.82 | 77.5% |
| Logistics Provider | Pinnacle Supply Chain | USA | 2,581,912.06 | 1,563,928.22 | 1,017,983.84 | 60.6% |
| Financial Institution | Vertex Capital Group | USA | 2,443,775.16 | 1,901,589.09 | 542,186.07 | 77.8% |
| Staffing Agencies | Vertex Human Capital | USA | 2,795,945.13 | 1,808,892.73 | 987,052.40 | 64.7% |
| Manufacturer | Vertex Industrial | Ukraine | 54,649.31 | 41,351.51 | 13,297.80 | 75.7% |
| Raw Material Supplier | ZestyZest Citrus Oils | USA | 2,551,257.34 | 1,765,088.06 | 786,169.28 | 69.2% |
| Total | | | 14,484,792.82 | 9,962,399.80 | 4,522,393.02 | 68.8% |

Debt and Coverage by Country

in k USD

Country USA Italy Poland South Africa Thailand Ukraine Costa Rica

USA: 10,373K
Italy: 3,221K
Poland: 631K

Geo-Situation of Debt and Coverage %

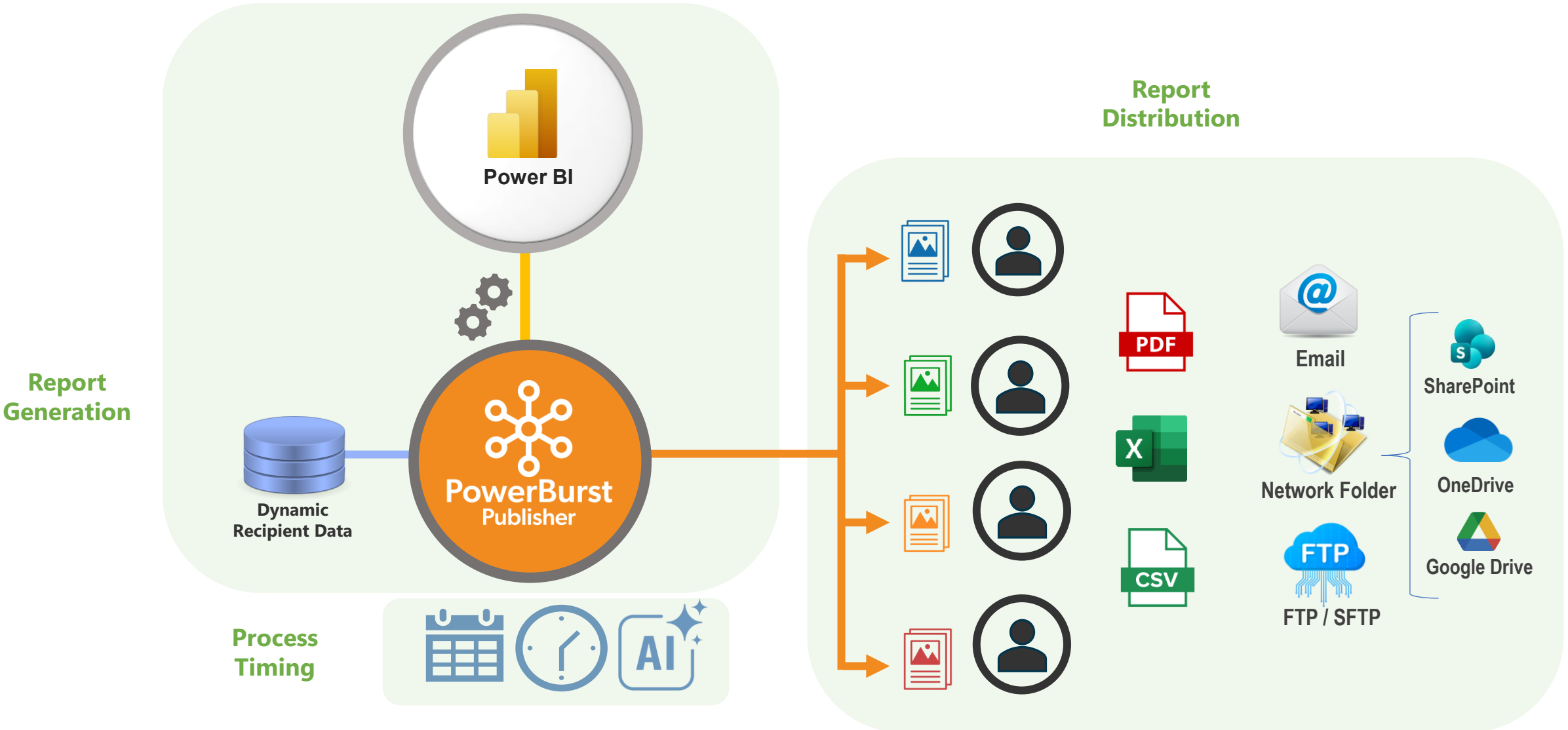
Grayscale (Light)

Payment Term situation

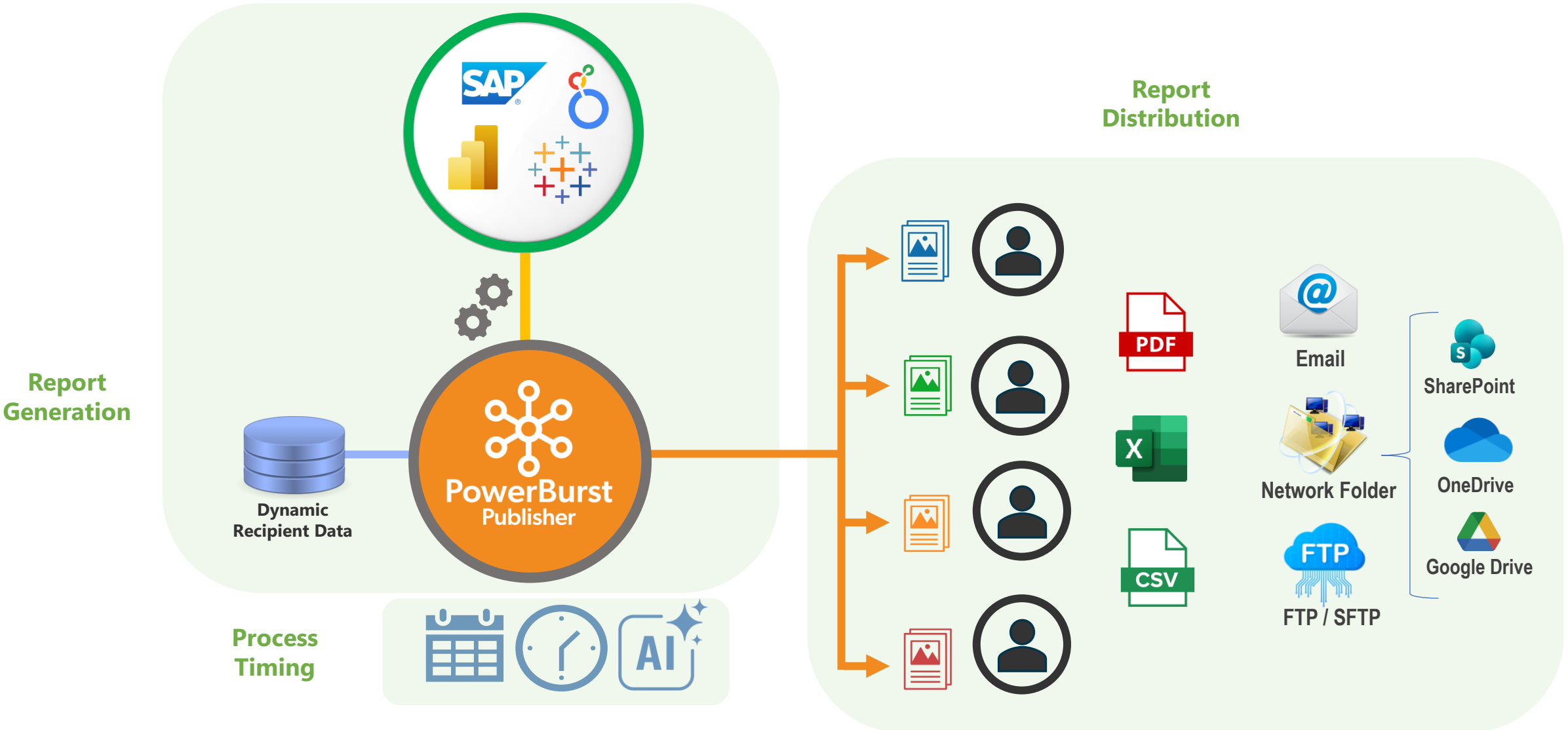
Payment Terms

- Over 90: 12.33%
- Net 60: 17.9%
- Net 30: 20.34%
- Net 90: 49.42%

PowerBurst Process: Power BI



PowerBurst Process: Multi-Platform



Report Generation

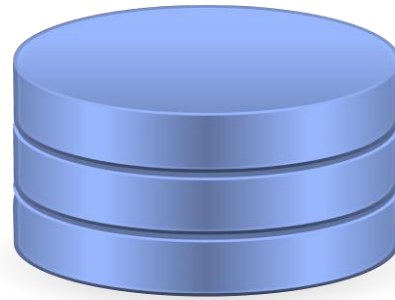
...dynamic, data driven report generation

Dynamic Recipient Data

A data source provided by customer which contains values to drive dynamic report filtering and control report distribution.

Any ODBC / OLE DB data source

- Azure SQL Server/SQL Server on prem
- Excel, Access, Synapse etc.
- S/4HANA, Datasphere, BW, BW/4HANA
- Google Big Query
- Snowflake

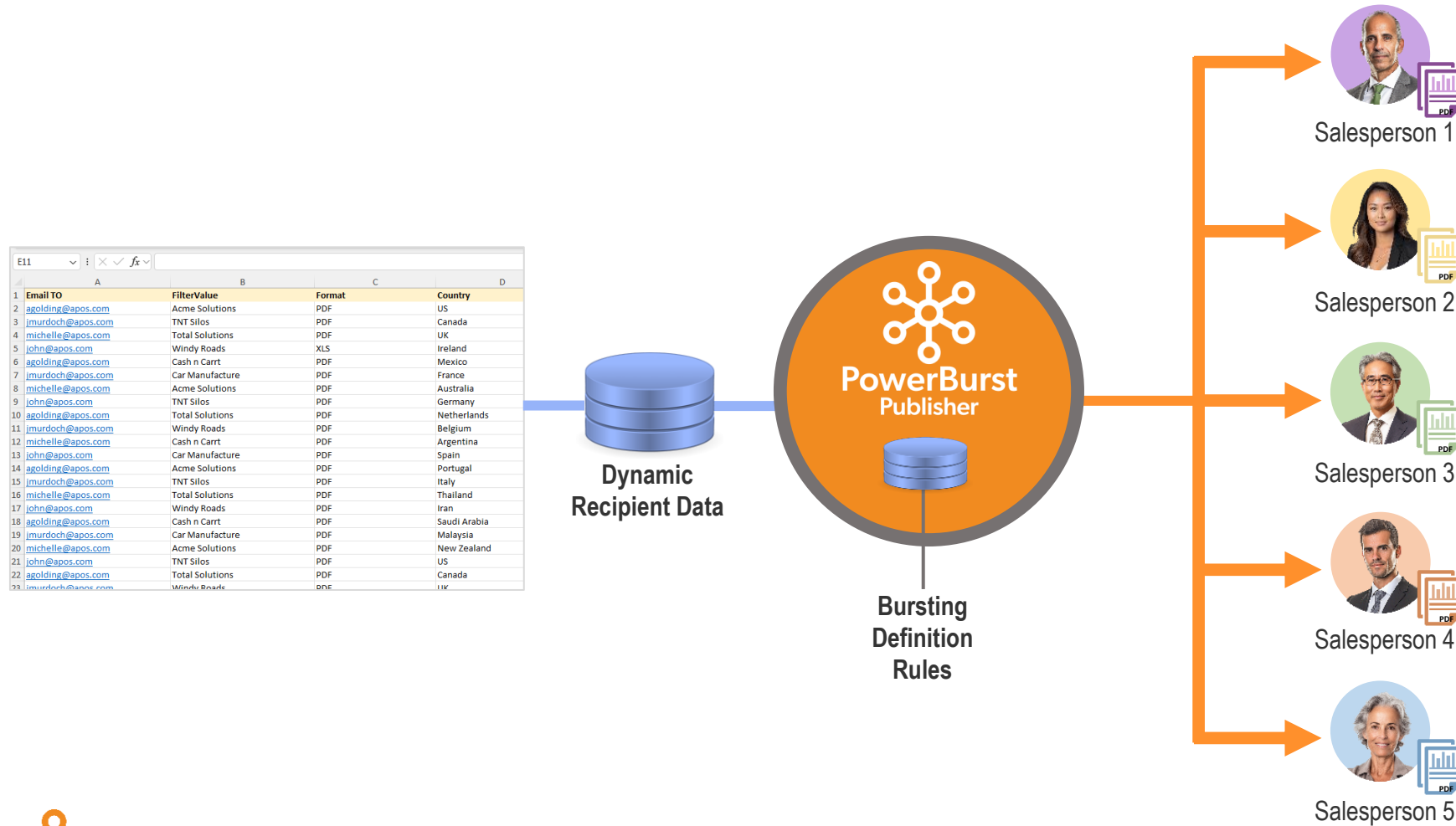


Dynamic
Recipient Data

The PowerBurst bursting definition creates the framework and rules for the broadcast.

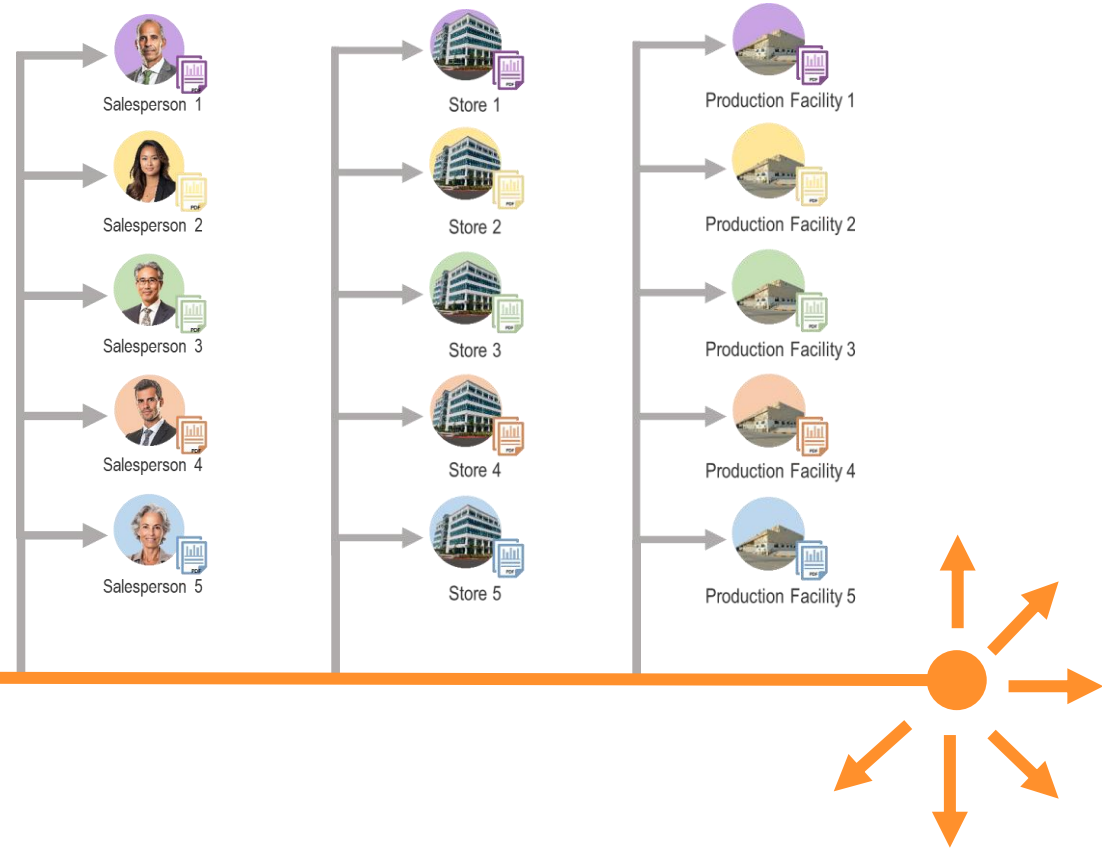
The **Dynamic Recipient Data** drives the specific values of the broadcast.

Dynamic Recipient Broadcasting



Unlimited Use Cases

| | A | B | C | D |
|----|-------------------|-----------------|--------|--------------|
| 1 | Email TO | FilterValue | Format | Country |
| 2 | agolding@apos.com | Acme Solutions | PDF | US |
| 3 | imurdoch@apos.com | TNT Silos | PDF | Canada |
| 4 | michelle@apos.com | Total Solutions | PDF | UK |
| 5 | john@apos.com | Windy Roads | XLS | Ireland |
| 6 | agolding@apos.com | Cash n Carrt | PDF | Mexico |
| 7 | imurdoch@apos.com | Car Manufacture | PDF | France |
| 8 | michelle@apos.com | Acme Solutions | PDF | Australia |
| 9 | john@apos.com | TNT Silos | PDF | Germany |
| 10 | agolding@apos.com | Total Solutions | PDF | Netherlands |
| 11 | imurdoch@apos.com | Windy Roads | PDF | Belgium |
| 12 | michelle@apos.com | Cash n Carrt | PDF | Argentina |
| 13 | john@apos.com | Car Manufacture | PDF | Spain |
| 14 | agolding@apos.com | Acme Solutions | PDF | Portugal |
| 15 | imurdoch@apos.com | TNT Silos | PDF | Italy |
| 16 | michelle@apos.com | Total Solutions | PDF | Thailand |
| 17 | john@apos.com | Windy Roads | PDF | Iran |
| 18 | agolding@apos.com | Cash n Carrt | PDF | Saudi Arabia |
| 19 | imurdoch@apos.com | Car Manufacture | PDF | Malaysia |
| 20 | michelle@apos.com | Acme Solutions | PDF | New Zealand |
| 21 | john@apos.com | TNT Silos | PDF | US |
| 22 | agolding@apos.com | Total Solutions | PDF | Canada |
| 23 | imurdoch@apos.com | Windy Roads | PDF | UK |



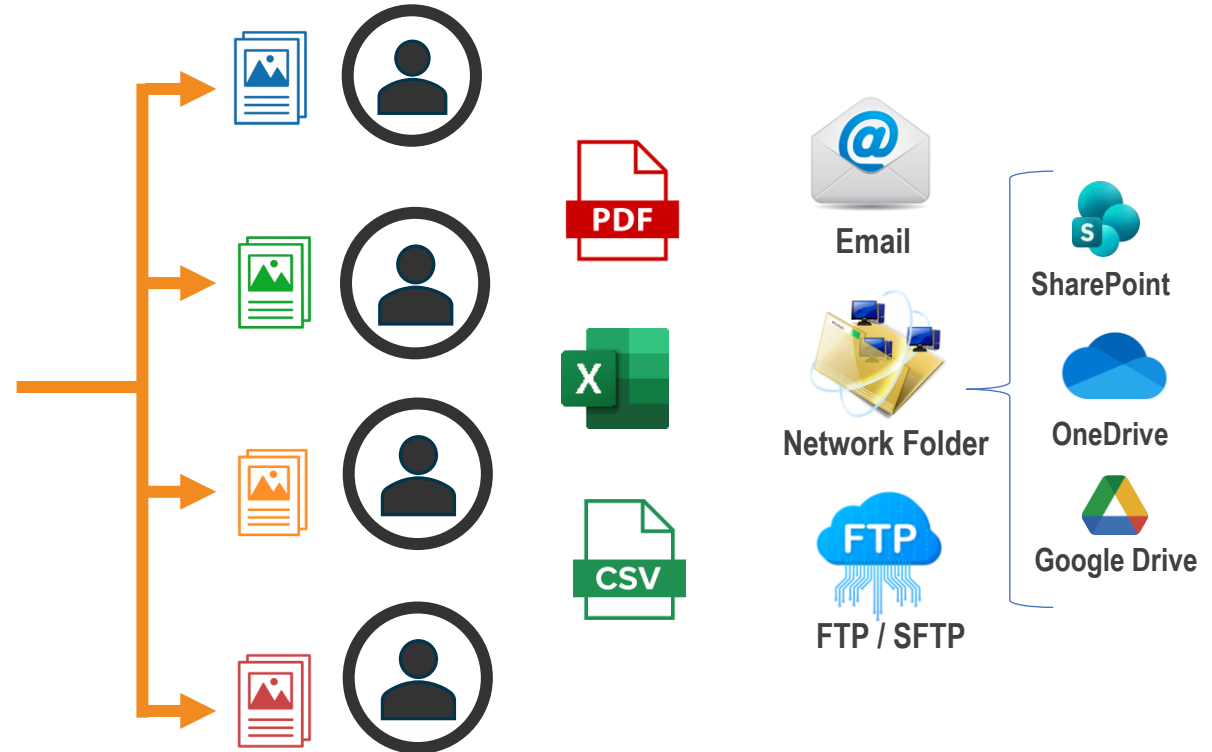
Report Distribution

...the right location, the right format

Report Distribution

Formats

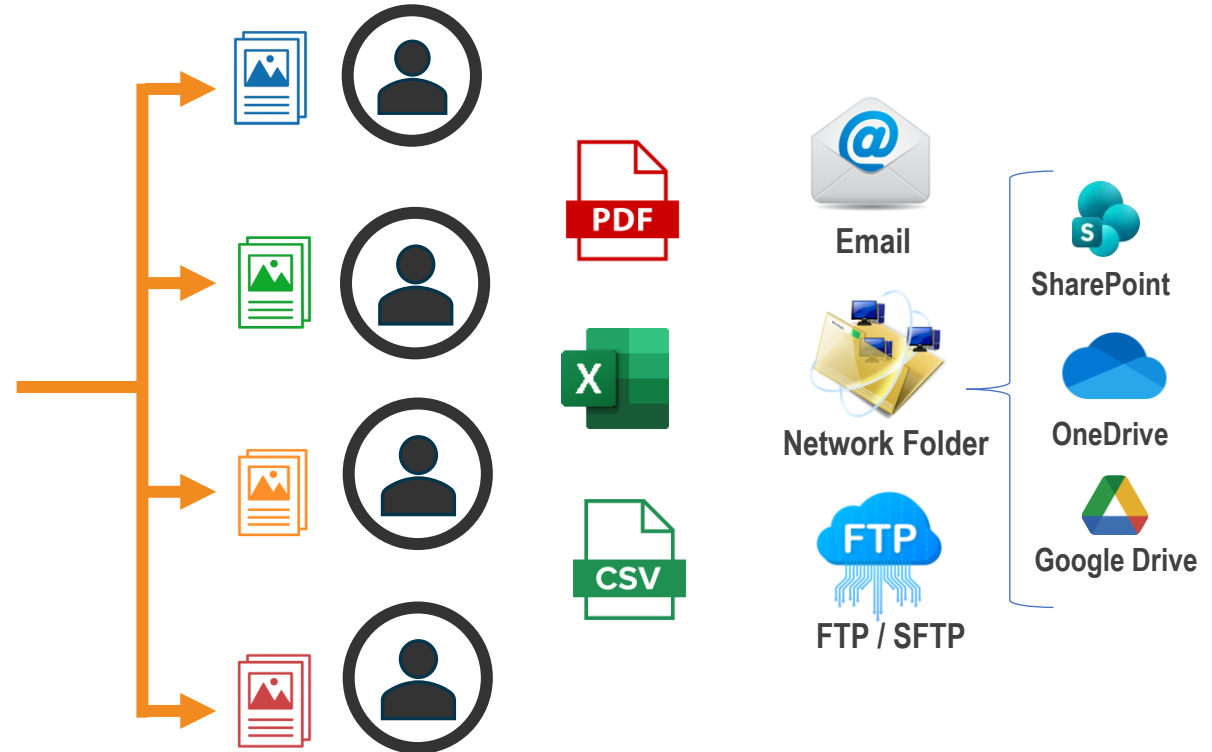
- PDF
- Excel
 - xls,xlsx,xlsm,xlsb
- CSV
- Image



Report Distribution

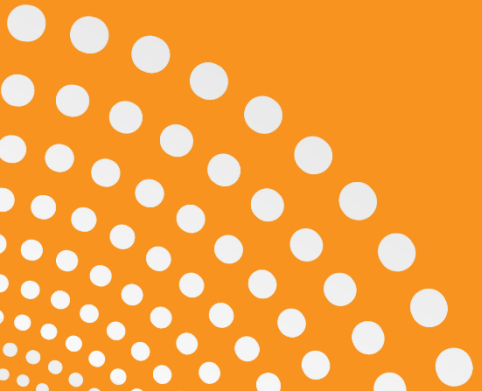
Destinations

- Email - as attachment
- Email - as body of email
- FTP/SFTP
- Network File
- SharePoint
- OneDrive
- Google Drive



Process Timing

...at the right time



Process Timing – Execution Triggers

Date + Time

- Single or Recurring
- Hourly, Daily, Weekly, Monthly



Command Line

- Process chain integration
- Automation tool integration
- Bot integration



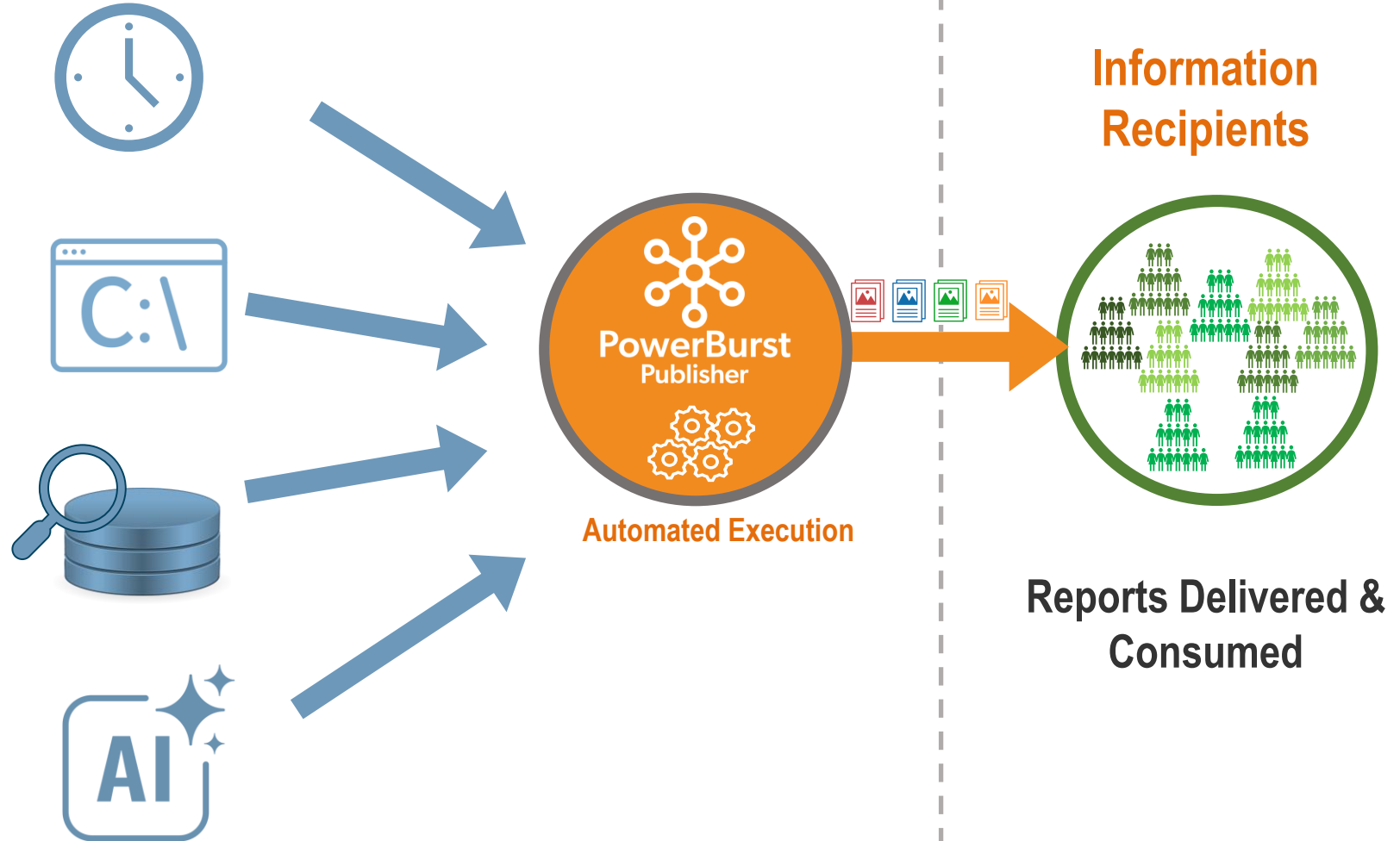
Conditional

- Business rules driven trigger
- Execution by threshold value criteria
- Data load completion triggers



Agentic AI

- Integration with Agentic AI
- AI can drive broadcast with dynamic selection of reports, recipients, filters



Report Generation

The screenshot shows the configuration interface for report generation in PowerBurst. The interface is divided into several sections:

- Definition Settings:** Name: BFAP_SAC, Description: (empty text box).
- Burst Data Source:** Data Source: \Public Data Sources\Data Source Transfers\SUPABASE, Type: DB, Description: SQL: Select * FROM command_table.
- Process Settings:** Sleep Until Field: (empty dropdown), Process Delay: 5 seconds per record, Process Timeout: 180 seconds per record, Max. Threads: 1, Disable Batch Bursting.
- Source Document:** Source Type: SAC Story / Application, SAC Tenant: SAP Analysis for Microsoft Office, Document ID: Google Looker, Tableau, Power BI, Type: Story, Use LDG, .
- Login Credentials:** Authentication: SAP Analytics Cloud, Use Scheduler Information for SAC Login, Username: agolding@apos.com, Password: (masked), Use Scheduler Information for DB Login, Data Auth Type: (empty dropdown), Data Username: (empty), Data Password: (masked), Auth Selection: (empty), Show passwords in preview.

Two red boxes highlight the left-hand navigation menu (containing 'Bursting Definition', 'Distribution', 'Destination', 'Filters and Variables', 'Failure Recovery', and 'Extended Information') and the 'Source Document' section.

Report Generation



Bursting Definition

Definition Settings

Name: BFAP_PBI2

Description:

Burst Data Source

Data Source: \Public Data Sources\Data Source Transfers\BlueFem

Type: DB
Description:
SQL: Select * FROM [BlueFem\$]

Sleep Until Field:

Process Delay: 5 seconds per record

Process Timeout: 180 seconds per record

Max. Threads: 1 Disable Batch Bursting

Source Document

Source Type: Power BI

Power BI Tenant: PowerBI_Production

Credentials: Use Connection Profile for Owner

Power BI Doc: Public\Reports\Esteban\Blue Fem Accounts Payable v1 [Browse...](#)

Power BI Doc ID: a6bcc7b-999f-4790-9dcf-1dbc04897406



Report Generation



Power BI Filter Management

Table Name: +

Field Name: +

Field Data Type: +

Operator: +

Value: Add Value

Filter Values: +

Example: Red

Syntax: Enter one single value.

Pages

Select All

Select Page: Add

Selected Pages:

| ID | Display Name |
|----|--------------|
| | |
| | |
| | |
| | |
| | |

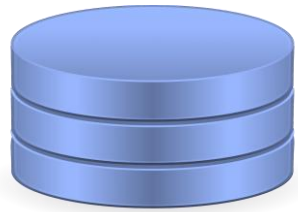
Remove

Clear All

Page Names: +



Report Generation



Dynamic Recipient Data

The image shows a screenshot of an Excel spreadsheet titled "BlueFern.xlsx". The spreadsheet contains a table with the following data:

| | A | B | C | D | E | F |
|----|---------|----------------------------------|------------------------------|---------------------|---------------------|------------------------|
| 1 | Trigger | Recipient | LOB | Subsidiary | Responsible | Formats |
| 2 | Y | muyiwa.andrews@bluefern.com | Alcoholic Drinks | America,Asia,Europe | Muyiwa Andrews | PDF, Excel |
| 3 | Y | fabio.abery@bluefern.com | Energy Drinks | America,Asia,Europe | Fabio Abery | PDF, PowerPoint |
| 4 | Y | chieko.semonin@bluefern.com | Soft Drinks | America,Asia,Europe | Chieko Semonin | PDF |
| 5 | Y | christopher.daniell@bluefern.com | Syrups | America,Asia,Europe | Christopher Daniell | Power Point |
| 6 | Y | chiaki.aspden@bluefern.com | Water | America,Asia,Europe | Chiaki Aspden | Excel |
| 7 | Y | chieko.hickinbotham@bluefern.com | Energy Drinks,Soft Drinks | America,Asia,Europe | Chieko Hickinbotham | PDF, Excel, PowerPoint |
| 8 | Y | ayub.lockett@bluefern.com | Syrups,Water | America,Asia,Europe | Ayub Lockett | PDF, Excel, PowerPoint |
| 9 | Y | ralph.plested@bluefern.com | Alcoholic Drinks,Soft Drinks | America,Asia,Europe | Ralph Plested | PDF, Excel, PowerPoint |
| 10 | Y | adrian.watchorn@bluefern.com | Syrups,Water | America,Asia,Europe | Adrian Watchorn | PDF |
| 11 | Y | ken.siften@bluefern.com | Alcoholic Drinks,Soft Drinks | America,Asia,Europe | Ken Siften | PDF |

Report Distribution



Power BI Output Options

Export Formats: PDF

Zip Documents:

Document Password:

PDF Options:

PDF format applies to pages only.

Pages

Select All Pages

Select Page:

Selected Pages:

| ID | Display Name | Page Or... |
|----------------------|----------------------------|------------|
| 9551dd021d03c998d348 | Overall AP Situation | 4 |
| fc0bbc45ea28ab0b556d | Accounts Payable | 1 |
| a2a256c1ac264e3e2d87 | Short Term AP Analysis | 3 |
| 3541e8e4bbbe2d7e8a9e | Section by Account Manager | 2 |

Page IDs: (PageID=9551dd021d03c998d348),(PageID=fc0bbc45ea28ab0b556d),(PageID=a2a256c1ac264e3e2d87),(PageID=3541e8e4bbbe2d7e8a9e)

Report Distribution



Destination

Destination Type: +

Send Output As: +

File Name Mask: + Add

To: +

CC: +

BCC: +

From: +

Subject: +

Message: +

Message Format: HTML Image Placeholders: Add

Image DPI: +

Email Headers: + Add

Example: HeaderName 1=Value 1;SecondHeader=%P4CUser%;

Process Timing – Date & Time Scheduling

The screenshot displays the APOS Publisher for Cloud interface. A modal dialog titled "Schedule Bursting Definition" is open, providing configuration options for process scheduling. The dialog includes the following fields and options:

- PROCESSING SERVER:** A dropdown menu currently set to "<Any>".
- When do you want the burst to run?:** A dropdown menu set to "Weekly".
- START DATE/TIME:** Radio buttons for "Now" (selected) and "Set start date and time:" (with date: 2024-11-12, time: 04:29 PM).
- END DATE/TIME:** Radio buttons for "Never" (selected) and "Set end date and time:" (with date: 2024-11-12, time: 04:29 PM).
- RUN EVERY:** Checkboxes for days of the week: Monday (checked), Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday.
- Buttons:** "Schedule" and "Cancel" buttons at the bottom right.

PowerBurst Capabilities

- Dynamic Rules
- Filters/Variables
- Security Integration
- Formats & Destinations
- Export Options
- Integrated Scheduling
- Conditional Broadcasting
- Agentic AI Integration
- Monitoring & Alerts



Agentic AI Integration

'Next level' automation and process orchestration

- Harness agentic AI scenario tracking & monitoring
- Conditional execution based on AI analysis logic
- AI driven broadcasts – dynamic selection of reports, recipients, filters
- Unlimited use case possibilities



Agentic AI Integration



Agent tracks & monitors a wide range of conditions & metrics



When trigger conditions exist, Agent writes key details into Dynamic Recipient Data

AI Agent



Dynamic Recipient Data



PowerBurst Publisher



Targeted recipients receive personalized, proactive report

Information Recipients



PowerBurst triggers processing and executes burst based on report, recipient & filter instructions from Agent

Proactive Intelligence Scenario



Inventory Management

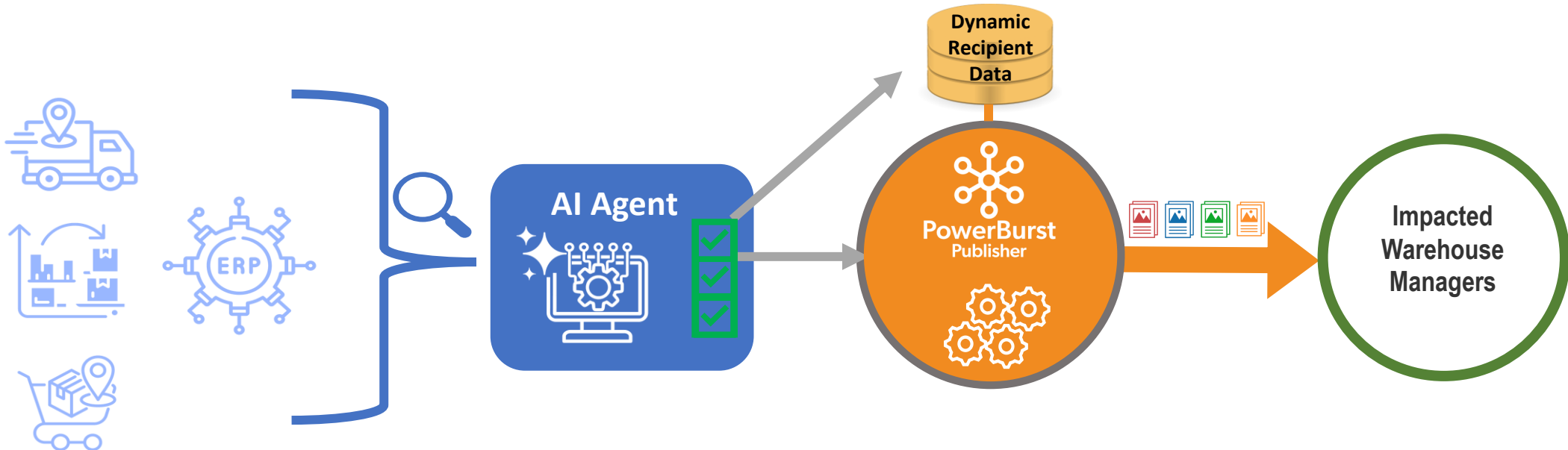
AI Agent: Agent monitors inventory levels and projected deliveries across hundreds of warehouses

Trigger:

- The Agent detects projected warehouse inventory shortages
- The Agent passes impacted warehouse data to PowerBurst

Burst Action by PowerBurst:

- PowerBurst receives critical trigger information from Agent
- Generates & sends report to impacted warehouse managers
- Includes delivery volumes, schedules and recommendations

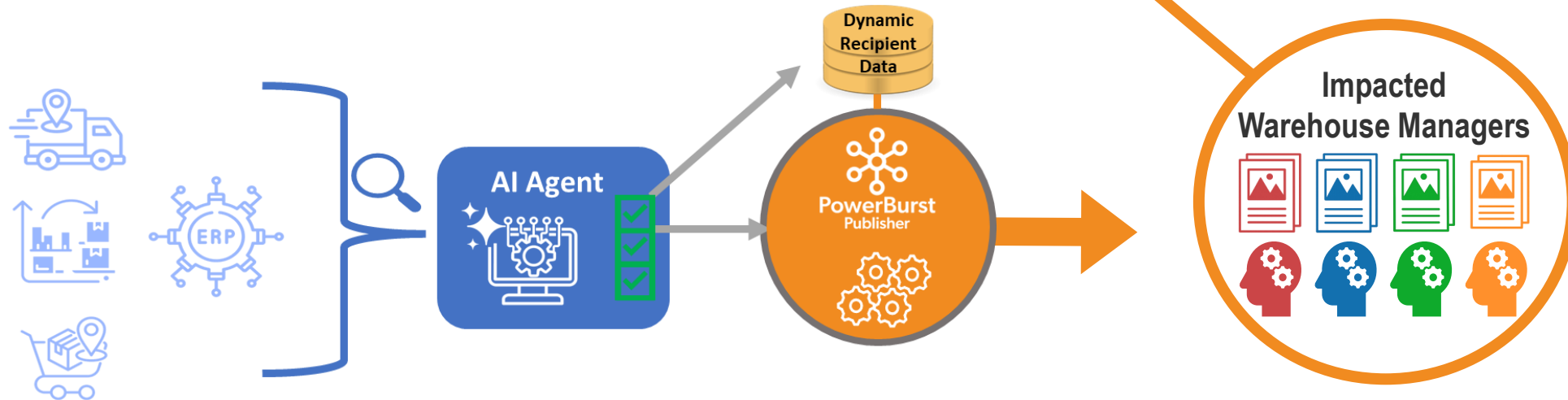


Proactive Intelligence Scenario

Inventory Management



Proactive Intelligence: Warehouse Manager of each impacted warehouse is equipped to act on replenishing needed stock in advance of inventory shortage



Proactive Intelligence Scenario



Equipment Maintenance

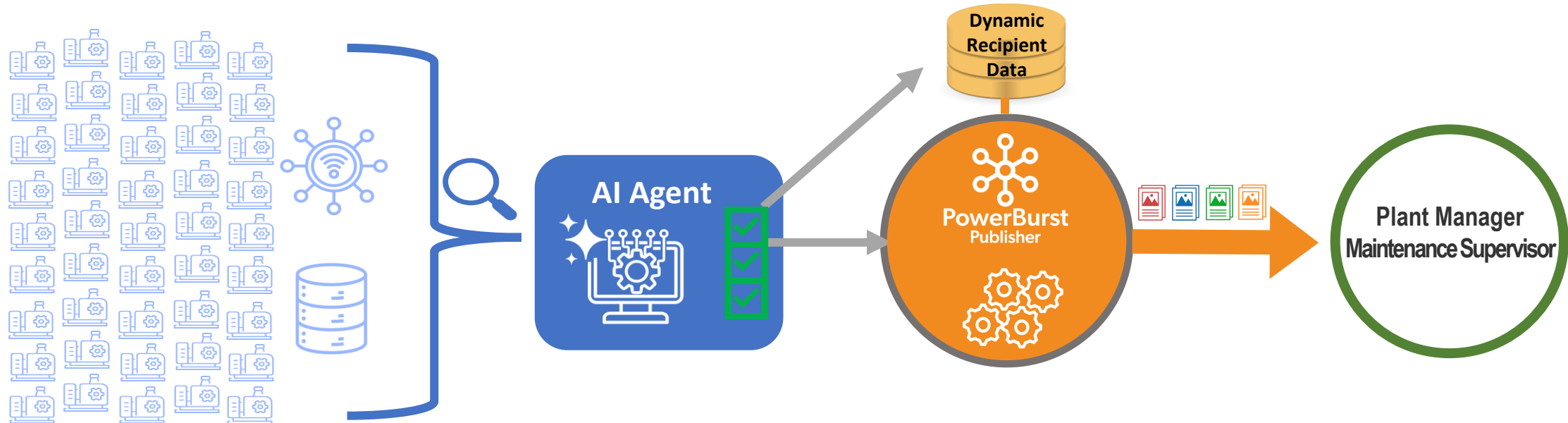
AI Agent: Agent monitors multiple variables within IoT machine data and performance metrics in real time

Trigger:

- The Agent detects indicators of a potential machine outage or equipment failure

Burst Action by PowerBurst:

- PowerBurst receives critical trigger information from Agent
- Generates & sends tailored reports to Maintenance Supervisor & Plant Manager highlighting risk and preventive action needs

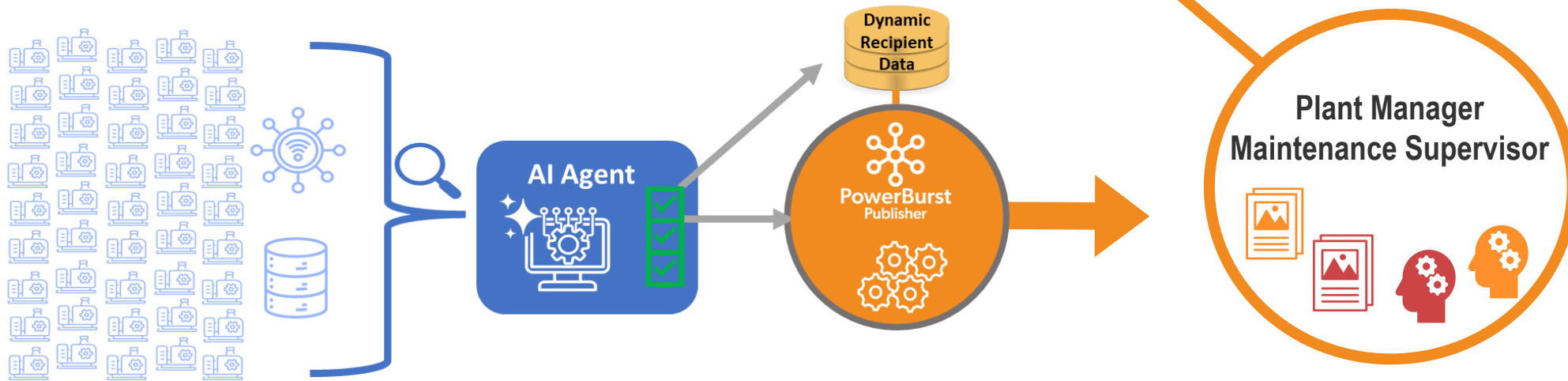


Proactive Intelligence Scenario

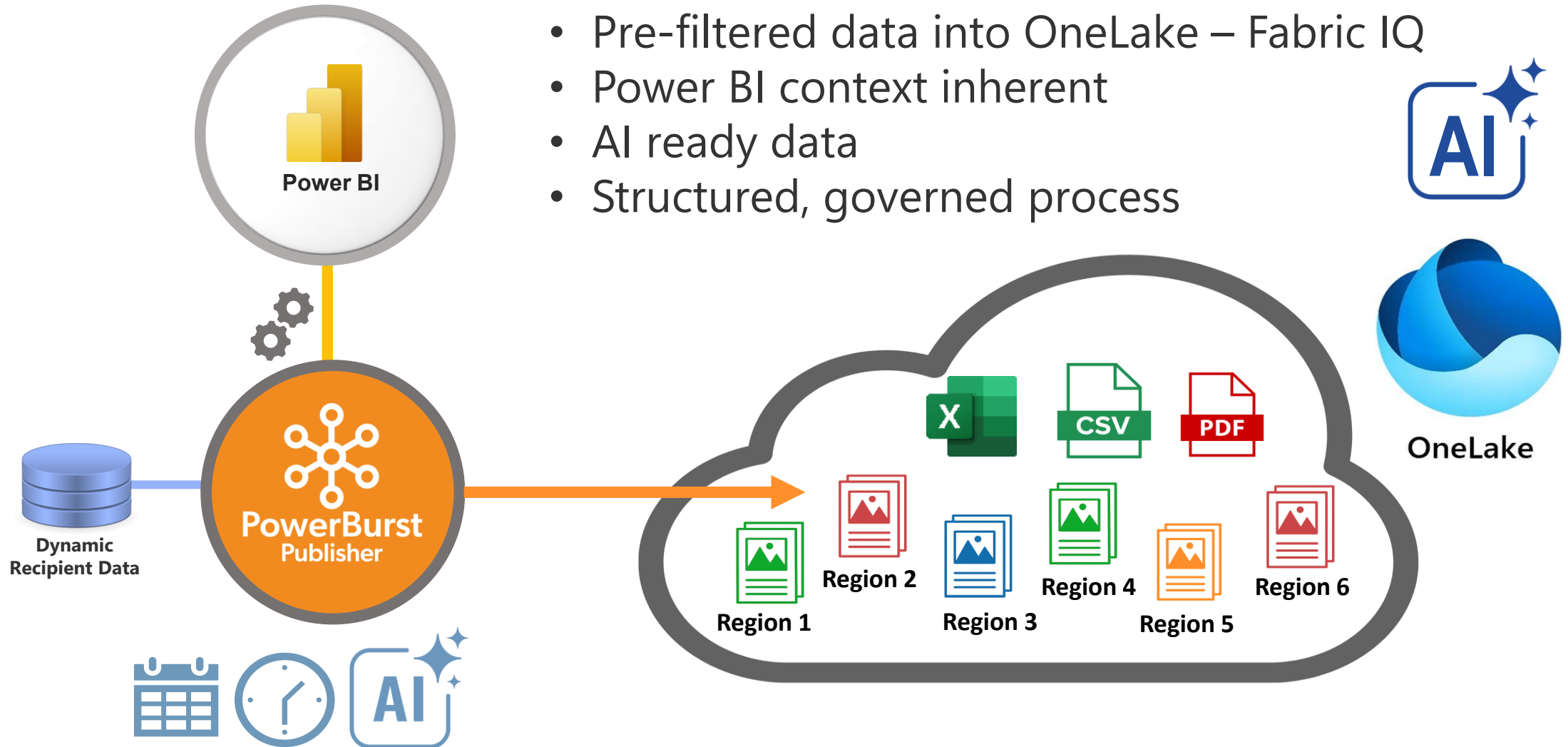
Equipment Maintenance



Proactive Intelligence: Maintenance Supervisor alerted and engaged to take preventive action & avoid production downtime. Plant Manager informed throughout



PowerBurst Process: OneLake Coming Soon!



Resources

Today's Webinar Recording: Link by email tomorrow

Whitepaper: [Report Broadcasting Orchestration in Cloud-Based Analytics](#)

Whitepaper: [Analytics Report Broadcasting](#)

Blog: [Agentic AI: Developing Specific Broadcasting Use Cases with APOS PowerBurst Publisher](#)

Next Steps

- Review Solution Resources
- Webinar Recording
- Discovery Call
- Solution Use Case Assessment
- Solution Technical Review

STAY CONNECTED

LINKEDIN



APOS Systems Inc.

QUESTIONS?

Please enter your questions in the Q&A panel.



Thank you!

Get in touch

WEBSITE

www.powerburst.com

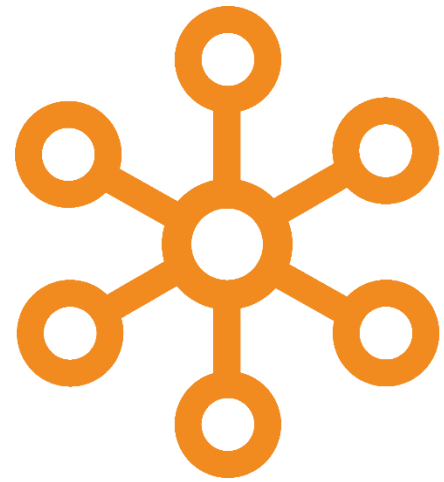
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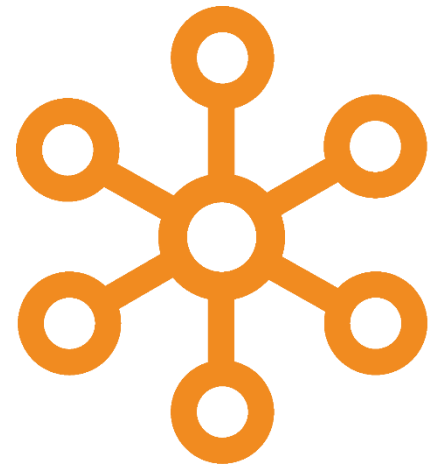
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