

**Reports User Guide  
For  
Users Who Access MSBI Reports**

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## 1. Introduction

This document provides detailed instructions for end-users to access BI reports through Azure.

The following are the targeted audience for this document:

- SIS/BI Internal Users
- SIS/BI External B2B Users
- SIS/BI External Guest Users

Detailed instructions have been provided for:

- First-time account creation
- Subsequent login process

## SIS Internal User Login

### First Time Login to SIS/Reports Server

Follow the instructions given below to access BI Reports when you are logging in to new Azure SIS/Reports Server for the first time

**Note:** If the user has already followed the first login process for SIS, they can skip this step

#### Step 1 –

This process will take 7-10 minutes to complete.

Open your CDPH mailbox. Click 'Get Started'.

Note: Please check 'Junk/Spam Folder' before contacting the GDSP Program Administrator.



Figure 1.1 Email Template

#### Step 2 –

### Review the permissions and click 'Accept'

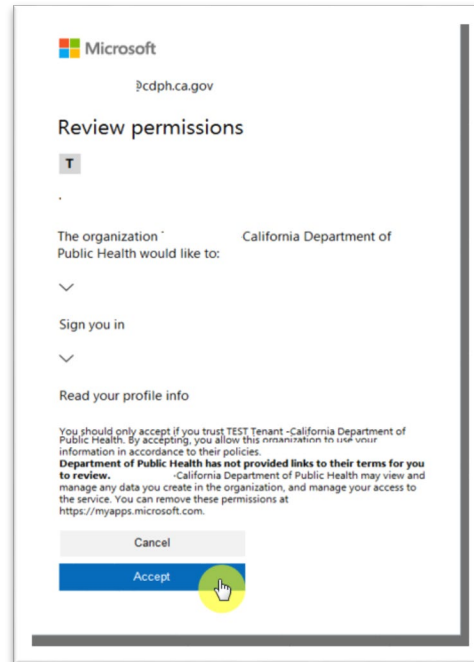


Figure 1.2 Review Permissions

### Step 3 –

- a. If you have access to more than one application, i.e. SIS and Reports Server, you will see the dashboard, with the applications that you're eligible to access. Click on SIS-ReportServer, to access BI reports.

## User Guide for accessing Reports

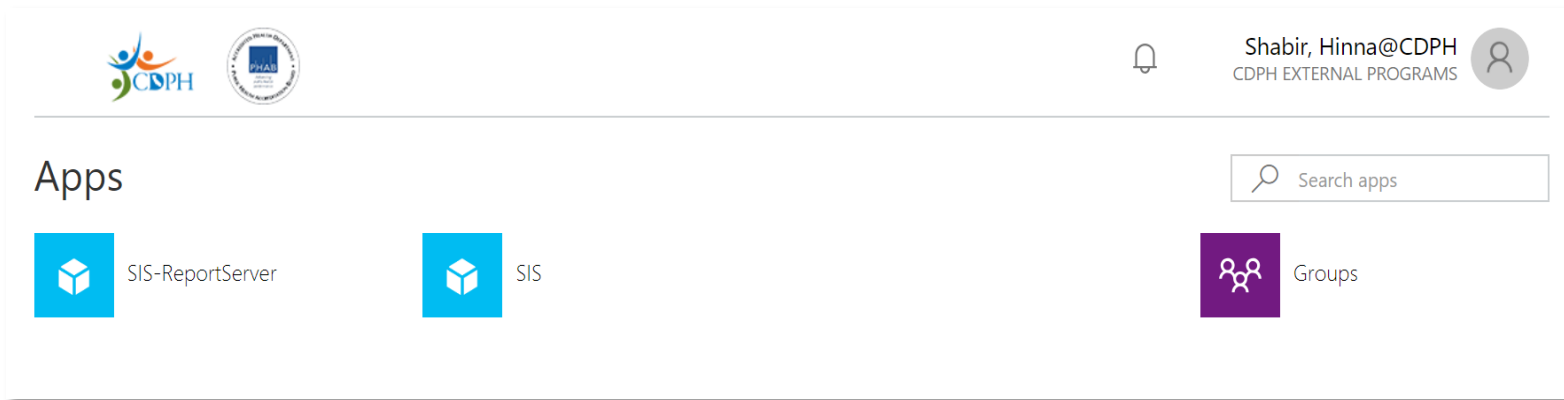


Figure 1.3 Dashboard for Users who have multiple accesses

- b. If you have access to just Reports Server, you will be directed to the Reports folder on Power BI Server. The screenshot below shows the folder you will land on.

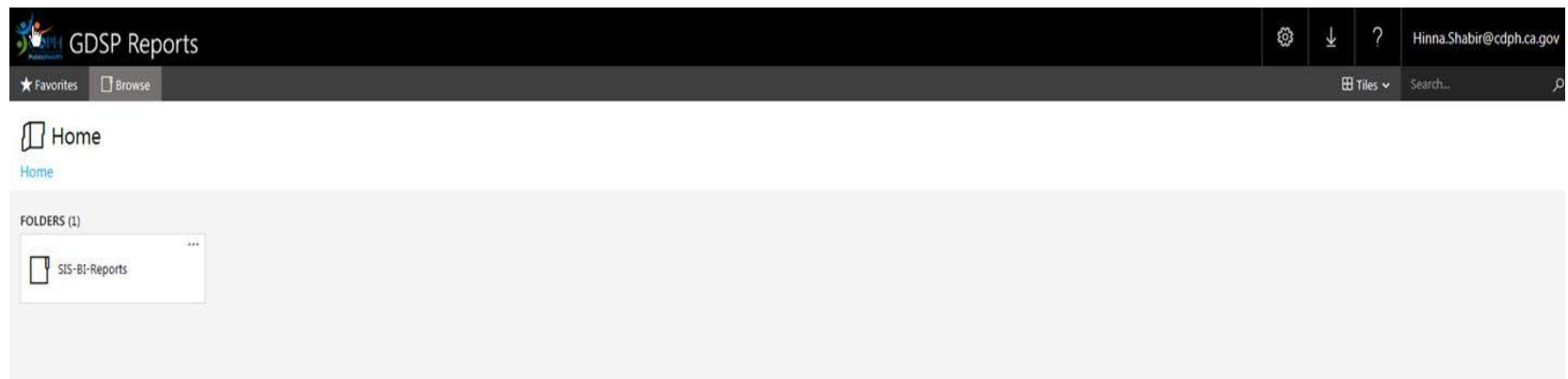


Figure 1.4 Landing folder for all reports users

### Step 4 –

Once you click on the folder, SIS-BI-Reports, you will see only the report folders that you have access to.

## User Guide for accessing Reports

The screenshot below shows an example of the landing folder for a user who has access to one of the report sub-folders and the reports inside that folder.

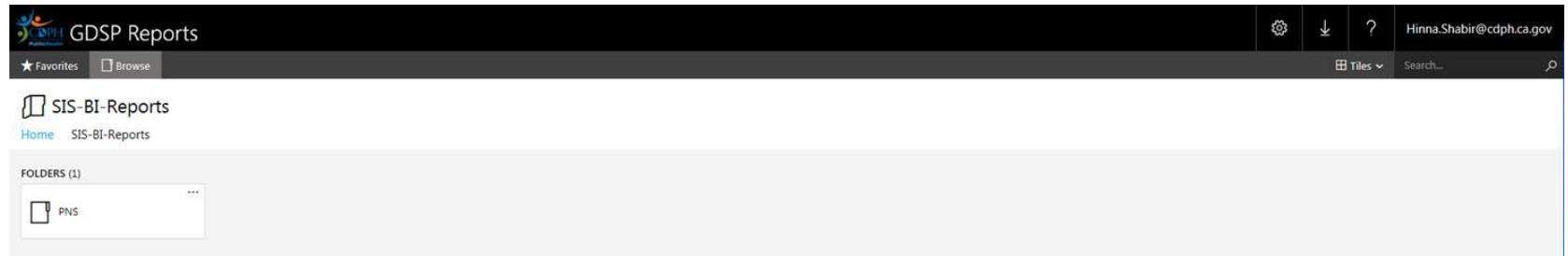


Figure 1.5 Landing folder for users who have access to PNS Reports

### Login from CDPH Network – Subsequent Logins

Follow the instructions given below to access BI Reports when you are connected to CDPH network. This process will take approximately 4-6 minutes to complete.

#### Step 1 –

Open a browser, go to <https://sisreports.cdph.ca.gov/pbirs/>

If you have signed in previously with another account, you may see this screen. Click on your account name if it's displayed here or click 'Use another account'.

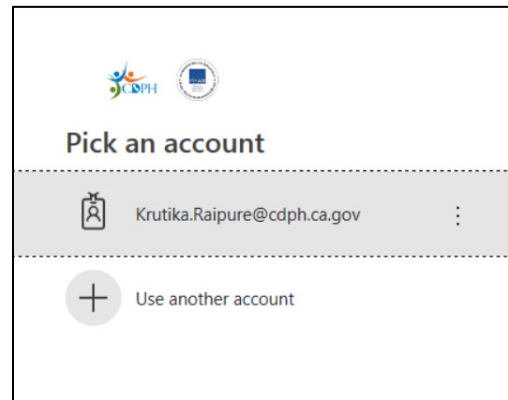


Figure 1.6 Azure Login Page

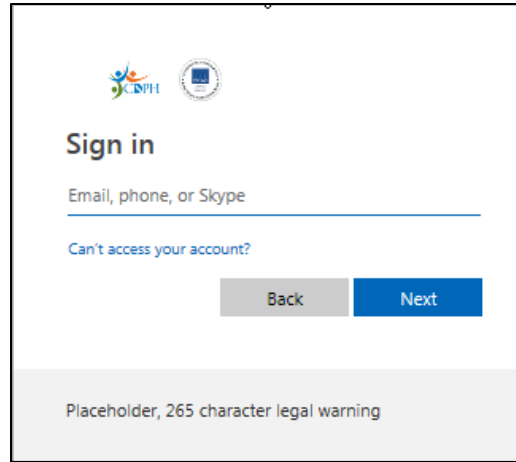


Figure 1.7 Enter email address

**Step 2 –**

- a. You will be directed to the Reports folder on Power BI Server to which you have access. The screenshot below shows the landing folder.

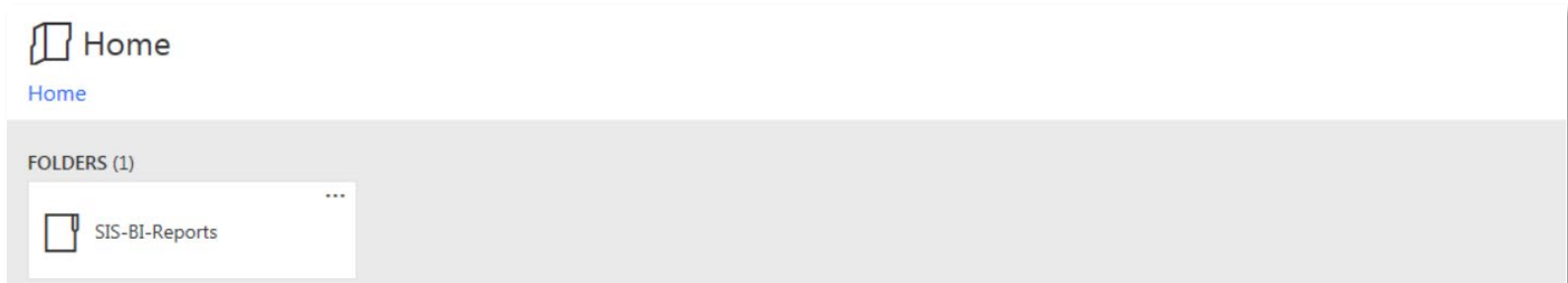


Figure 1.8 Landing folder for users who have Super User access to Reports



### Login from External Network – Subsequent Logins

Follow the instructions given below to access SIS when you are connecting from an external network i.e., your home Wi-Fi etc. You may be asked to confirm your authenticity using MFA, for which mobile device is required.

This process will take approximately 4-6 minutes to complete.

#### Step 1 –

Open a browser, go to

If you have signed in previously with another account, you may see this screen. Click on your account name if it's displayed here or click 'Use another account'.

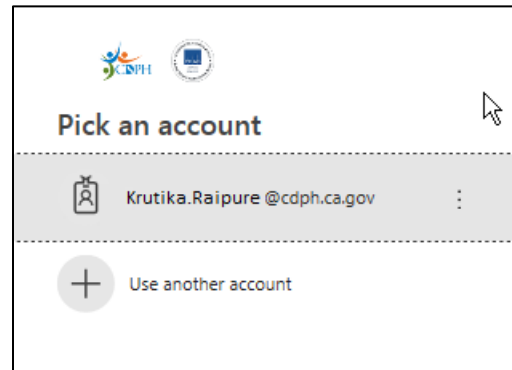


Figure 1.10 Azure Login Page

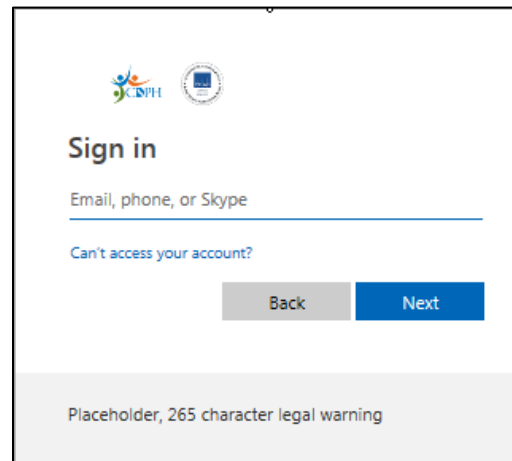


Figure 1.11 Enter email address

**Step 2 –**  
Enter password in the CDPH Federated page

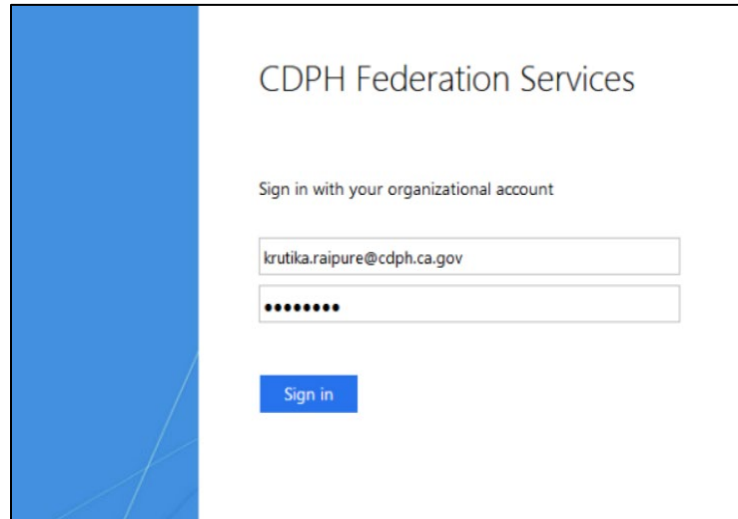


Figure 1.12 CDPH Authentication Page

Open your authenticator mobile app and hit '**Approve**'

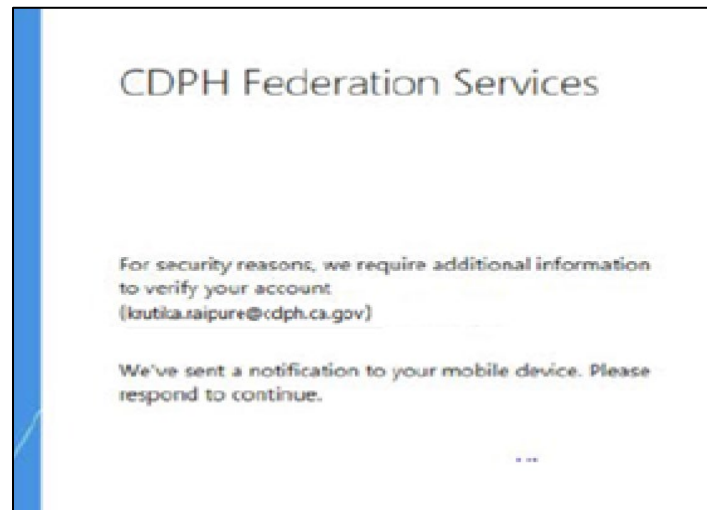


Figure 1.13 CDPH Authentication Page 2

**Step 3 –**

You will be directed to the Reports folder on Power BI Server to which you have access. The screenshot below shows the landing folder.



Figure 1.14 Landing folder for users who have Super User access to Reports

## 2. Background

**Navigation:** The navigation to the MSBI reports required the users to access Reports SharePoint server where all the reports were hosted. The reports were categorized by frequency of the report run and put in folder names like Daily, Monthly, etc.

As a part of Power BI Azure migration, this navigation is modified to be divided into Program Areas of Biobank, NBS, PNS, PDES and PSQA. This will help the Program Area report users to navigate to their areas in a simplified way.

**Note:** URL to Access MS BI Reports - <https://sisreports.cdph.ca.gov/pbirs/>

Here is a quick guide to access the reports with the simplified navigation and enhancements

### 3. How to Navigate to Reports

**Step 1** - Follow all the steps to log in to the Report Server

**Step 2** - Select SIS-BI Reports as shown below instead of SIS Production Reports

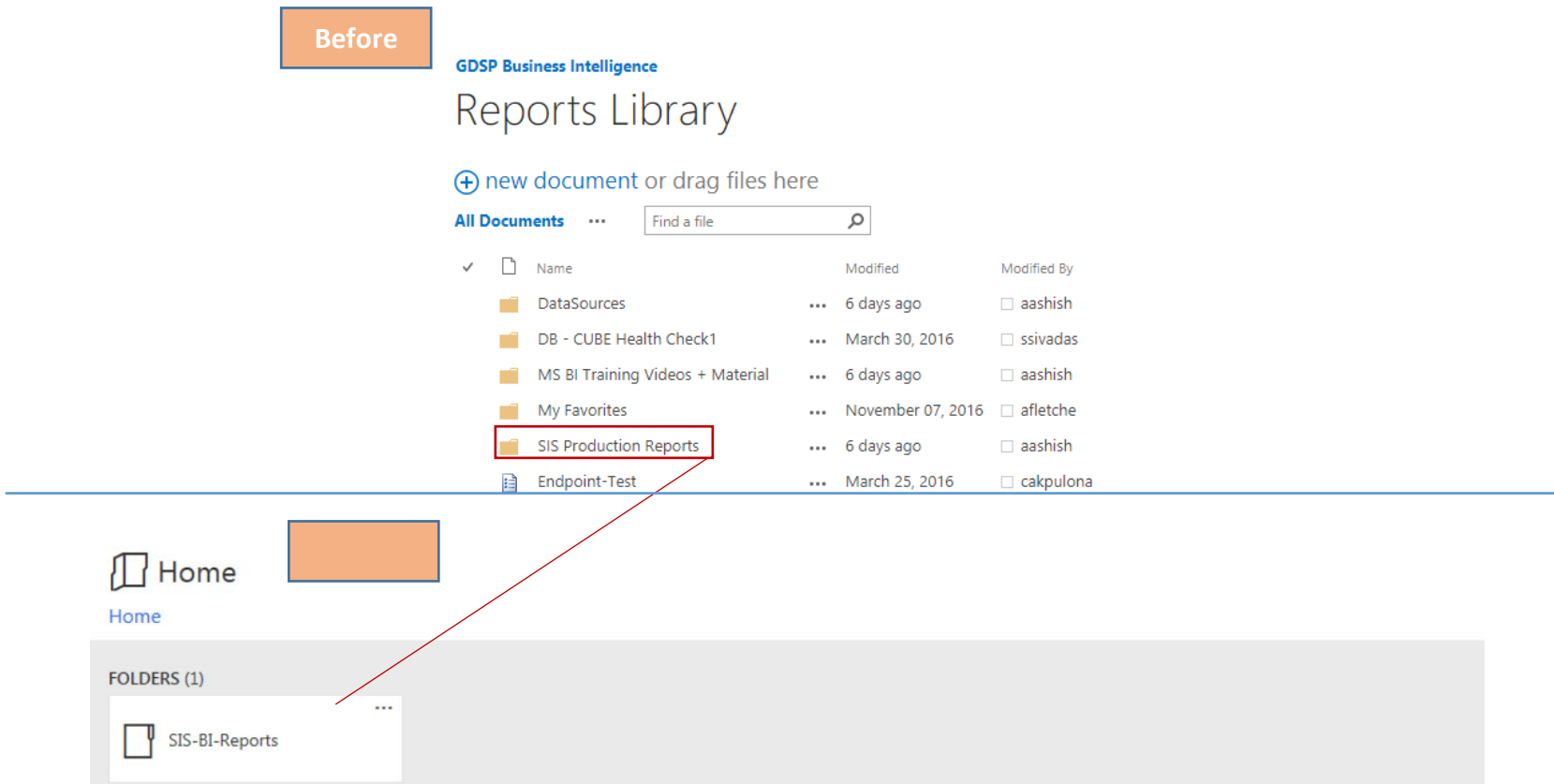


Figure 1.15 Navigating to BI reports

## 4. How to Access reports

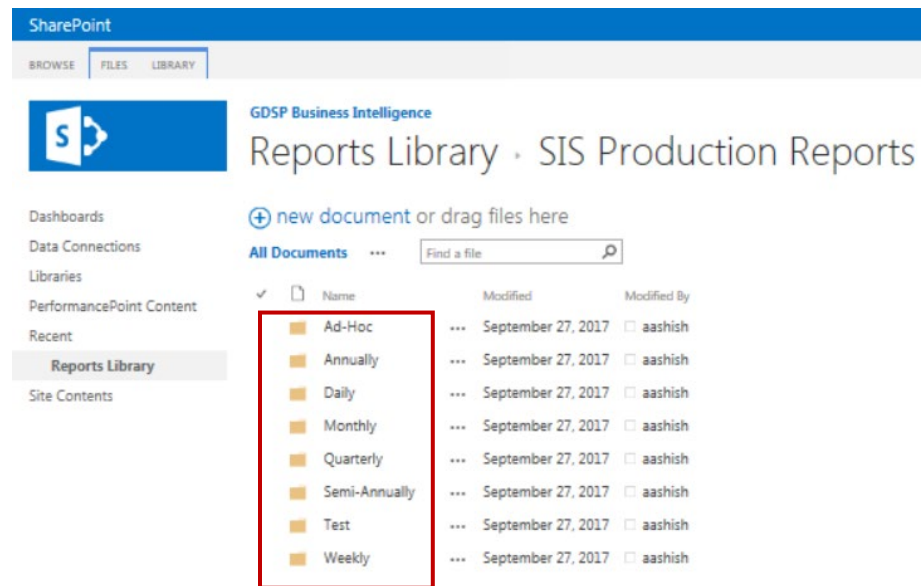
**Step 1** - Click on SIS-BI Reports and select the program area

When you select “SIS-BI Reports” folder, you get folders by program areas

- Biobank
- NBS
- PDES
- PNS
- PSQA

These folders will be visible to only report users based on individual’s access level as per the program area

Before



After

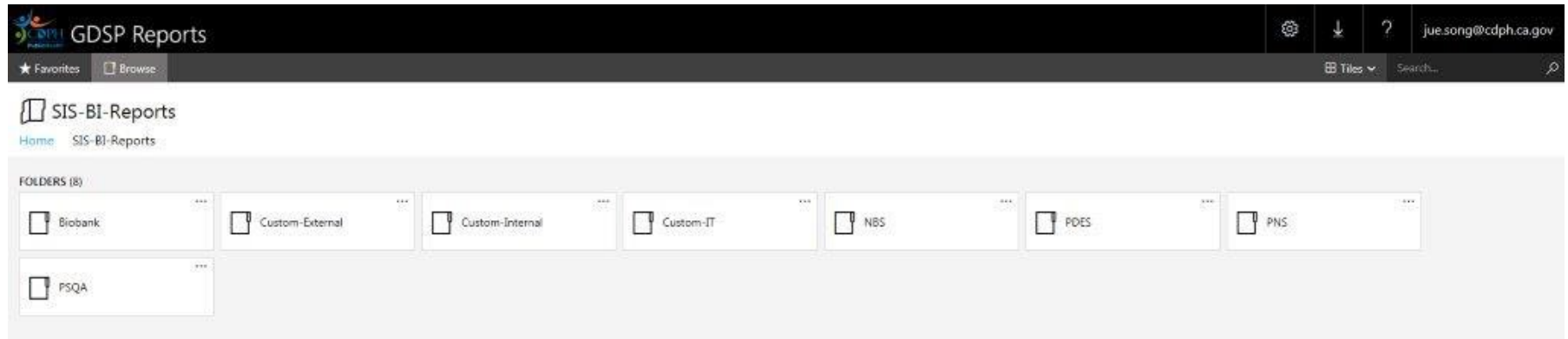


Figure 1.16 Folders within SIS-BI-Reports

## User Guide for accessing Reports

Each program area folder is divided into sub-folders as per the area of user's work. Below is the list of all Program Areas, with the subfolders listed under each of them.

| <b>Biobank</b> | <b>NBS</b>           | <b>PDES</b> | <b>PNS</b> | <b>PSQA</b> |
|----------------|----------------------|-------------|------------|-------------|
| Biobank-GDL    | NAPS-ASC             | PDES-GDL    | PNS-GDL    | PSQA-GDSP   |
| Biobank-GDSP   | NBS Follow-up Center | PDES-GDSP   | PNS-GDSP   | PSQA-PDC    |
| Biobank-NAPS   | NBS-GDL              |             | PNS-Leads  |             |
|                | NBS-GDSP             |             | PNS-NAPS   |             |
|                | NBS-NAPS             |             | PNS-CCC    |             |



## User Guide for accessing Reports

So, going forward each of the report and respective excel and PDF exports will be in its own Program and Sub-Program area folder.

See an example in the screenshot below.

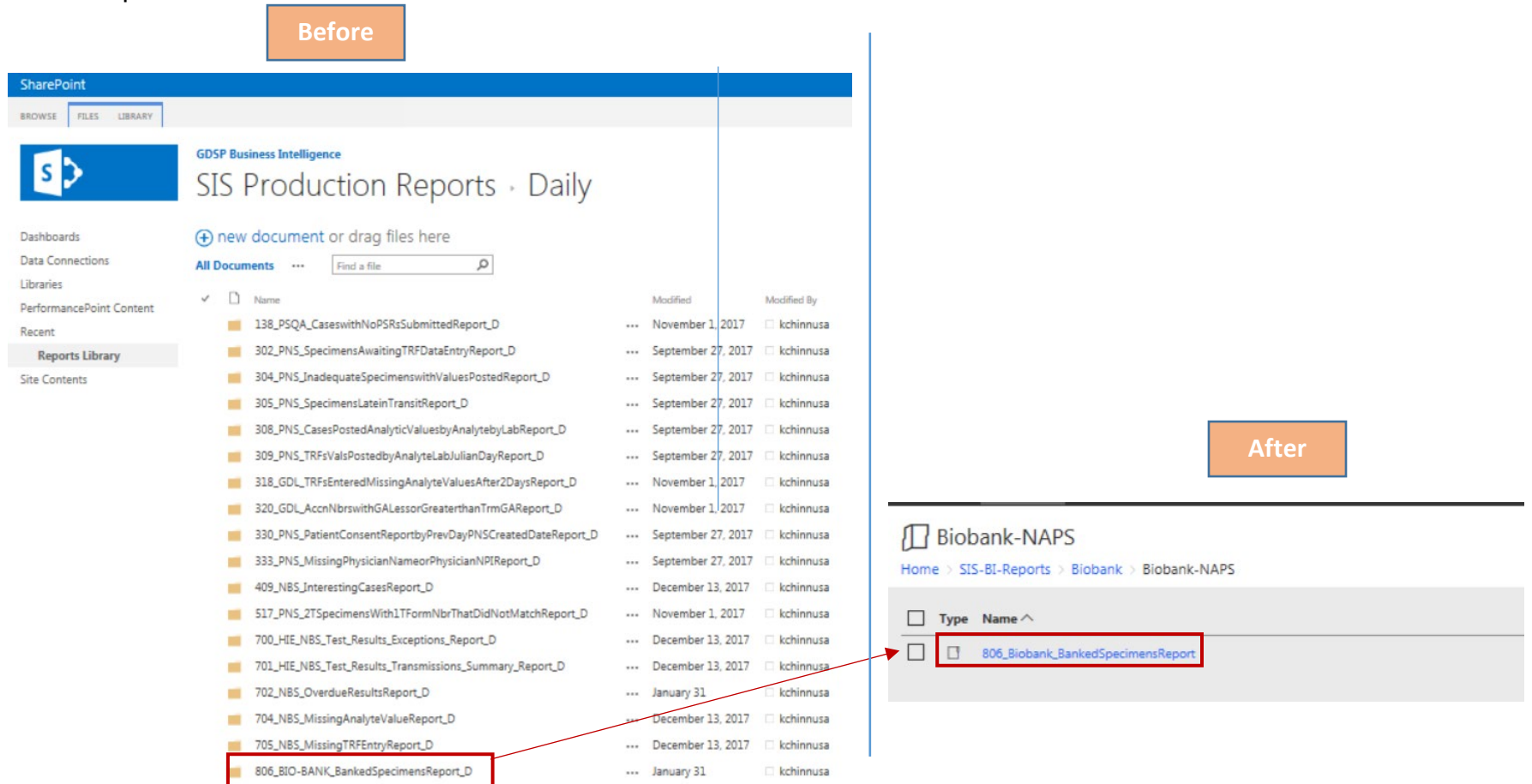


Figure 1.17 Accessing report folders

## Accessing Standard Reports

### Navigate to the desired Report Folder

- Below is an example on how to access the report inside the new report folder structure
- Navigate to the folder where the desired report is placed  
**Example: Home > SIS-BI-Reports > Biobank > Biobank-NAPS**
- Click on folder “806\_Biobank\_BankedSpecimensReport”
  - a. Latest Excel and PDF extracts of the report will be available for the users to view the data
    - Users can leverage these excel and PDF files for daily work
    - This will eliminate the manual process of exporting the report into excel and pdf files

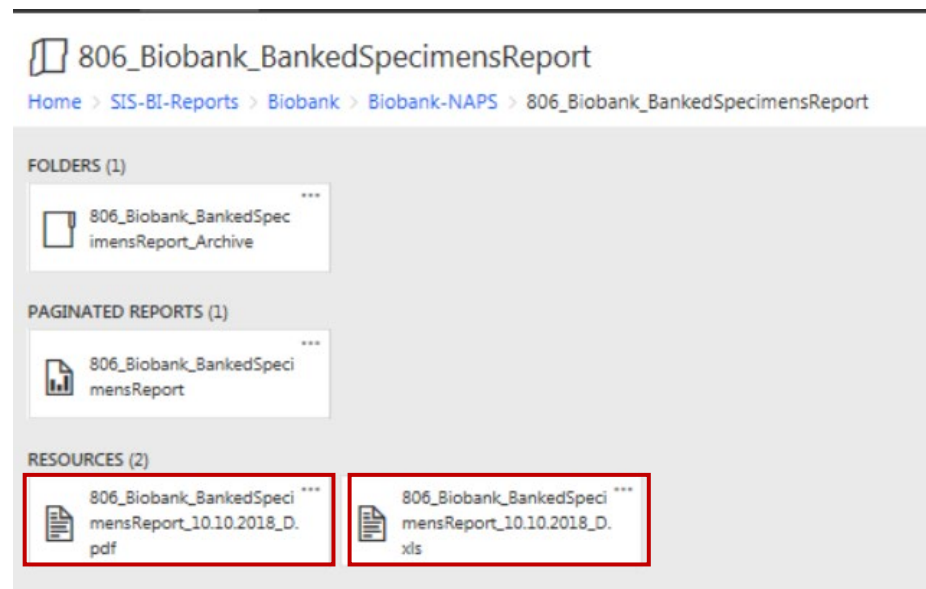


Figure 1.18 Location of PDF and Excel extracts of reports

## User Guide for accessing Reports

- b. Archived reports can be accessed by clicking on the folder called as <<Report Name>>\_Archive as shown below:

The excel and pdf report files that are generated will be archived daily in the archive folder

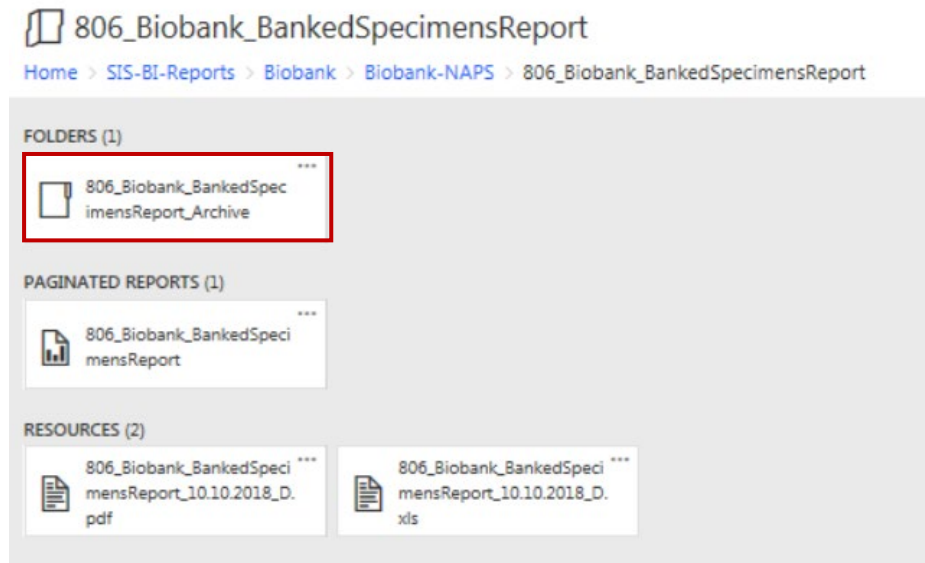


Figure 1.19 Report archive folder

- c. Viewing the report by clicking on report file
- The report file can be accessed if you want to run the report for a specific date range or for some selected parameters
  - Date parameters have been provided on the reports to request the data for a different period
  - Few reports also have other parameters, e.g. Lab Code to request information based on a selected lab code
  - You will be able to export the new data into excel and pdf manually

Below screen shots show an example of a report when you click on the report file:

# User Guide for accessing Reports

Home > SIS-BI-Reports > Biobank > Biobank-NAPS > 806\_Biobank\_BankedSpecimensReport > 806\_Biobank\_BankedSpecimensReport

Start Date: 1/1/2018 End Date: 10/10/2018 View Report

Banking Facility: Harbour Way, MEMORIAL HEALTH TEL

Document Map: 806\_Biobank\_BankedSpecimensReport > Harbour Way > Memorial Health Tech Laboratory

This report is produced by the Genetic Disease Screening Program, California Department of Public Health, and it may contain confidential material protected from disclosure by law. The confidentiality and security rules in Federal laws (including HIPAA) and State laws apply to the use of this data. Under state law, a person who negligently or knowingly breaches the confidentiality of a person listed in the screening program is subject to compensatory and civil damages (Health and Safety Code section 124582 (b)). This report may not be provided to any other entity without written permission of the Department and its use must be restricted to authorized personnel.

BIB Public Health Questions- 806a  
Report Name: BIB\_BIO-BANK\_BankedSpecimensReport Last Refresh Date: 10/11/2018

### Banked Specimens Report

#### Daily and Monthly Totals of Specimens Banked at Harbour Way

Specimen First Banked Date From January 1, 2018 To October 10, 2018  
Banking Facility: Harbour Way

**Daily Volume for October, 2018**

| Dried Blood Spot |              |               |          |       |
|------------------|--------------|---------------|----------|-------|
|                  | No Card Type | NAPS Lab Card | GDL Card | Total |
| Grand Total      | 0            | 0             | 0        | 0     |

**Monthly Volume from January 1, 2018 to October 10, 2018**

| Dried Blood Spot |              |               |          |       |
|------------------|--------------|---------------|----------|-------|
|                  | No Card Type | NAPS Lab Card | GDL Card | Total |
| Grand Total      | 56810        | 0             | 0        | 56810 |

| Dried Blood Spot |              |               |          |       |
|------------------|--------------|---------------|----------|-------|
| Date             | No Card Type | NAPS Lab Card | GDL Card | Total |
| 10/9/2018        | 0            | 0             | 0        | 0     |
| 10/8/2018        | 0            | 0             | 0        | 0     |
| 10/7/2018        | 0            | 0             | 0        | 0     |
| 10/6/2018        | 0            | 0             | 0        | 0     |
| 10/5/2018        | 0            | 0             | 0        | 0     |
| 10/4/2018        | 0            | 0             | 0        | 0     |
| 10/3/2018        | 0            | 0             | 0        | 0     |
| 10/2/2018        | 0            | 0             | 0        | 0     |
| 10/1/2018        | 0            | 0             | 0        | 0     |

| Dried Blood Spot |              |               |          |       |
|------------------|--------------|---------------|----------|-------|
| Date             | No Card Type | NAPS Lab Card | GDL Card | Total |
| 2018-10          | 0            | 0             | 0        | 0     |
| 2018-09          | 0            | 0             | 0        | 0     |
| 2018-08          | 228          | 0             | 0        | 228   |
| 2018-07          | 1428         | 0             | 0        | 1428  |
| 2018-06          | 9454         | 0             | 0        | 9454  |
| 2018-05          | 9242         | 0             | 0        | 9242  |
| 2018-04          | 8002         | 0             | 0        | 8002  |
| 2018-03          | 9401         | 0             | 0        | 9401  |
| 2018-02          | 9092         | 0             | 0        | 9092  |
| 2018-01          | 9995         | 0             | 0        | 9995  |

**Disclaimer:**  
The specimens get counted in respective Card Type section for NBS (Dried Blood Spots) as per the below rules  
 1. For all the specimens in category 'a' and 'b' - "No Card Type"  
     a. Specimens created before Specimen Split functionality Go Live  
     b. Specimens created after Specimen Split functionality Go Live with Specimen Barcode of type other than Accession Barcode  
 2. For all the specimens with Specimen barcode of type Accession Barcode which are NAPS Lab specimens - "NAPS Lab Card"  
 3. For all the specimens with Specimen barcode of type Accession Barcode which are GDL Lab specimens - "GDL Lab Card"

Figure 1.20 Example of report file

## User Guide for accessing Reports

- d. For running the report as of some date other than the default selected date parameters, change the dates at the top of the rendered page and click on **View Report** button top right-hand corner.

The screenshot shows a web application interface for generating a report. At the top, there are navigation tabs: Home, SIS-BI-Reports, Biobank, Biobank-NAPS, 806\_Biobank\_BankedSpecimensReport, and 806\_Biobank\_BankedSpecimensReport. Below the tabs, there are input fields for 'Start Date' (1/1/2018) and 'End Date' (10/10/2018), and a dropdown for 'Banking Facility' (Harbour Way MEMORIAL HEALTH TB). A 'View Report' button is located in the top right corner. The main content area displays the report title 'Banked Specimens Report' and the subtitle 'Daily and Monthly Totals of Specimens Banked at Harbour Way'. Below this, there are two tables: 'Daily Volume for October, 2018' and 'Monthly Volume from January 1, 2018 to October 10, 2018'. Both tables show the number of specimens banked by date, categorized by card type (No Card Type, NAPS Lab Card, GDL Card) and total. The 'Daily Volume' table shows zero specimens for all dates in October 2018. The 'Monthly Volume' table shows a total of 56810 specimens for the period from January 1, 2018, to October 10, 2018.

| Daily Volume for October, 2018 |                  |               |          |       |
|--------------------------------|------------------|---------------|----------|-------|
|                                | Dried Blood Spot |               |          |       |
|                                | No Card Type     | NAPS Lab Card | GDL Card | Total |
| Grand Total                    | 0                | 0             | 0        | 0     |

| Monthly Volume from January 1, 2018 to October 10, 2018 |                  |               |          |       |
|---|------------------|---------------|----------|-------|
|   | Dried Blood Spot |               |          |       |
|   | No Card Type     | NAPS Lab Card | GDL Card | Total |
| Grand Total   | 56810            | 0             | 0        | 56810 |

| Daily Volume for October, 2018 |                  |               |          |       |
|--------------------------------|------------------|---------------|----------|-------|
| Date                           | Dried Blood Spot |               |          |       |
|                                | No Card Type     | NAPS Lab Card | GDL Card | Total |
| 10/9/2018                      | 0                | 0             | 0        | 0     |
| 10/8/2018                      | 0                | 0             | 0        | 0     |
| 10/7/2018                      | 0                | 0             | 0        | 0     |
| 10/6/2018                      | 0                | 0             | 0        | 0     |
| 10/5/2018                      | 0                | 0             | 0        | 0     |
| 10/4/2018                      | 0                | 0             | 0        | 0     |
| 10/3/2018                      | 0                | 0             | 0        | 0     |
| 10/2/2018                      | 0                | 0             | 0        | 0     |
| 10/1/2018                      | 0                | 0             | 0        | 0     |

| Monthly Volume from January 1, 2018 to October 10, 2018 |                  |               |          |       |
|---|------------------|---------------|----------|-------|
| Date  | Dried Blood Spot |               |          |       |
|   | No Card Type     | NAPS Lab Card | GDL Card | Total |
| 2018-10   | 0                | 0             | 0        | 0     |
| 2018-09   | 0                | 0             | 0        | 0     |
| 2018-08   | 228              | 0             | 0        | 228   |
| 2018-07   | 1428             | 0             | 0        | 1428  |
| 2018-06   | 9454             | 0             | 0        | 9454  |
| 2018-05   | 9242             | 0             | 0        | 9242  |
| 2018-04   | 8002             | 0             | 0        | 8002  |
| 2018-03   | 9401             | 0             | 0        | 9401  |
| 2018-02   | 9092             | 0             | 0        | 9092  |
| 2018-01   | 9965             | 0             | 0        | 9965  |

Disclaimer:  
The specimens get counted in respective Card Type section for NBS (Dried Blood Spots) as per the below rules  
1. For all the specimens in category 'a' and 'c' - "No Card Type"  
2. Specimens created before Specimen Split functionality Do Live  
3. Specimens created after Specimen Split functionality Do Live with Specimen Barcode of type other than Accession Barcode  
4. For all the specimens with Specimen barcode of type Accession Barcode which are NAPS Lab specimens - "NAPS Lab Card"  
5. For all the specimens with Specimen barcode of type Accession Barcode which are GDL Lab specimens - "GDL Lab Card"

Figure 1.21 Selecting date parameters

**Note:** This feature of running the report with user specified parameter values is present in only few of the enhanced reports. Therefore, in case of reports where there are no user customizable prompts, you can use the generated excel and PDF exports.

## User Guide for accessing Reports

To export this new date range report, click on small **Save** icon on the left of **Print** Symbol and select the **Export Format**. Reports can be exported into PDF and Excel from here.

The screenshot shows a web application interface for generating reports. At the top, there is a breadcrumb trail: Home > SIS-BI-Reports > Biobank > Biobank-NAPS > 806\_Biobank\_BankedSpecimensReport > 806\_Biobank\_BankedSpecimensReport. Below this, there are input fields for Start Date (1/1/2018) and End Date (10/10/2018), and a dropdown for Banking Facility (Harbour Way, MEMORIAL HEALTH TE). A toolbar contains navigation icons, a page indicator (1 of 2), a refresh icon, a zoom level (100%), a 'Save' icon (highlighted with a red box), and a 'Print' icon. A context menu is open over the 'Save' icon, listing export options: Word, Excel (highlighted with a red box), PowerPoint, PDF (highlighted with a red box), TIFF file, MHTML (web archive), CSV (comma delimited), XML file with report data, and Data Feed. The report content includes a title 'Banked Specimens Report', subtitle 'Monthly Totals of Specimens Banked at Harbour Way', and date range 'Most Banked Date From January 1, 2018 To October 10, 2018'. It also lists the Banking Facility as Harbour Way. Two data tables are visible: 'Daily Volume for Oct' and 'Monthly Volume from January 1, 2018 to October 10, 2018'. The second table has columns for 'Dried Blood Spot' (No Card Type, NAPS Lab Card, GDL Card) and 'Total'. The Grand Total for the monthly volume is 56810.

| Daily Volume for Oct |  | Card | Total |
|----------------------|--|------|-------|
| No Card              |  | 0    | 0     |
| Grand Total          |  | 0    | 0     |

| Monthly Volume from January 1, 2018 to October 10, 2018 |                  |               |          |       |
|---|------------------|---------------|----------|-------|
|   | Dried Blood Spot |               |          | Total |
|   | No Card Type     | NAPS Lab Card | GDL Card |       |
| Grand Total   | 56810            | 0             | 0        | 56810 |

| Dried Blood Spot |              |               |          |       |
|------------------|--------------|---------------|----------|-------|
| Date             | No Card Type | NAPS Lab Card | GDL Card | Total |
|                  | 2018-10      | 0             | 0        | 0     |

Figure 1.22 Exporting report to excel or PDF

## Accessing Custom Reports

Reports that users previously accessed from the 'My Favorites' folder on SharePoint, will now be present in Custom-External and Custom-Internal folders.

## User Guide for accessing Reports

The screenshot shows the 'Reports Library' interface. At the top, there are navigation tabs for 'BROWSE', 'FILES', and 'LIBRARY'. Below these, the 'GDSP Business Intelligence' logo and 'Reports Library' title are visible. A search bar is present on the right. The main content area shows a list of folders under 'All Documents'. The 'My Favorites' folder is highlighted with a red box. The list includes folders like 'DataSources', 'MS BI Training Videos + Material', 'My Favorites', 'SIS Production Reports', and 'Endpoint-Test', each with a 'Modified' date and 'Modified By' user.

| Name                             | Modified           | Modified By |
|----------------------------------|--------------------|-------------|
| DataSources                      | September 27, 2017 | aashish     |
| MS BI Training Videos + Material | September 27, 2017 | aashish     |
| My Favorites                     | November 07, 2016  | afletche    |
| SIS Production Reports           | September 27, 2017 | kchinnusa   |
| Endpoint-Test                    | March 25, 2016     | cakpulona   |

Below the main interface, a secondary screenshot shows the 'GDSP Reports' header with a user profile 'jue.song@cdph.ca.gov'. The main content area displays 'SIS-BI-Reports' and a list of folders: 'Biobank', 'Custom-External', 'Custom-Internal', 'Custom-IT', 'NBS', 'PDES', 'PNS', and 'PSQA'.

Figure 1.23 Accessing custom reports

Each folder is divided into sub-folders as per the area of user's work. Below is the hierarchical tree that lists down all the folders and sub-folders, for custom reports.

## User Guide for accessing Reports

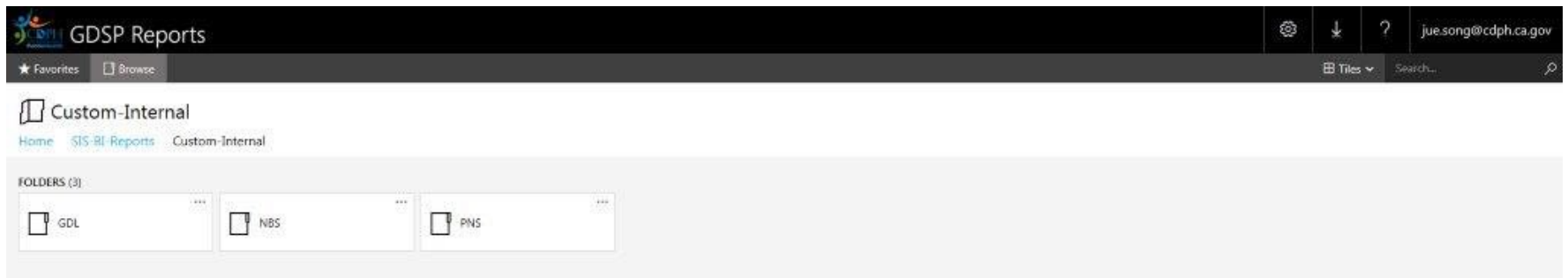
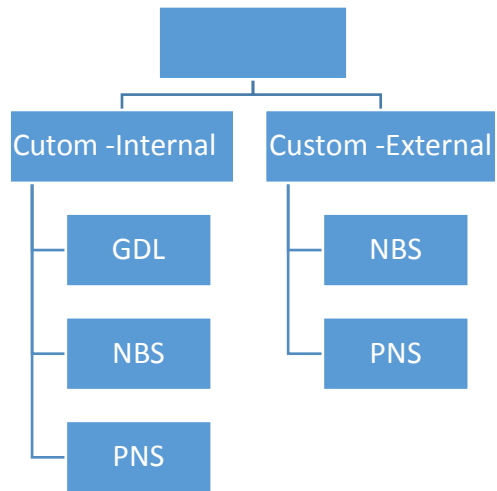


Figure 1.24 Folder structure for Custom-Internal reports

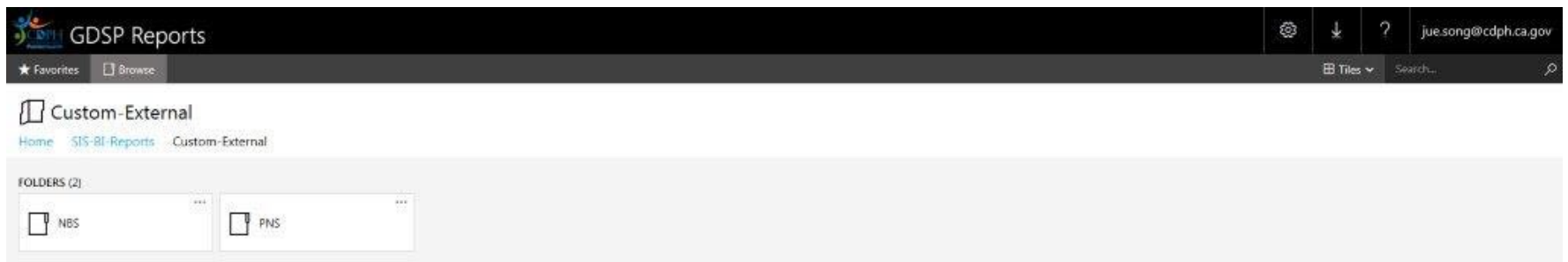


Figure 1.25 Folder structure for Custom-External reports