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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.

Step 2 –
Review the permissions and click ‘Accept’

![Figure 1.2 Review Permissions](image)

**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 subfolders 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
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.
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](image)

![Figure 1.11 Enter email address](image)

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

Open your authenticator mobile app and hit ‘Approve’
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/](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

![Image of Reports Library]

*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
User Guide for accessing Reports

Figure 1.16 Folders within SIS-BI-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.

<table>
<thead>
<tr>
<th>Biobank</th>
<th>NBS</th>
<th>PDES</th>
<th>PNS</th>
<th>PSQA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biobank-GDL</td>
<td>NAPS-ASC</td>
<td>PDES-GDL</td>
<td>PNS-GDL</td>
<td>PSQA-GDSP</td>
</tr>
<tr>
<td>Biobank-GDSP</td>
<td>NBS Follow-up Center</td>
<td>PDES-GDSP</td>
<td>PNS-GDSP</td>
<td>PSQA-PDC</td>
</tr>
<tr>
<td>Biobank-NAPS</td>
<td>NBS-GDL</td>
<td></td>
<td>PNS-Leads</td>
<td></td>
</tr>
<tr>
<td></td>
<td>NBS-GDSP</td>
<td></td>
<td>PNS-NAPS</td>
<td></td>
</tr>
<tr>
<td></td>
<td>NBS-NAPS</td>
<td></td>
<td>PNS-CCC</td>
<td></td>
</tr>
</tbody>
</table>
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
b. Archived reports can be accessed by clicking on the folder called as \texttt{<<Report Name>>\_Archive} as shown below:
The excel and pdf report files that are generated will be archived daily in the archive folder.

![Report archive folder](image)

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

Figure 1.20 Example of report file
d. For running the report as of some date other that 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.

![Figure 1.21 Selecting date parameters](image)

**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.

![Figure 1.22 Exporting report to excel or PDF](image)

**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.
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