Setup Guide for IT - Signatera Compliance Tracker

Overview

This guide is intended for EMR/IT teams to set up and automate data delivery from EMRs (e.g., Flatiron OncoEMR) to Power BI.

Step 1: Configure EMR Export

- Use the EMR's reporting tool to export key fields: MRN, Treatment Plan, Appointment Dates, Lab Orders.

- Recommended format: CSV or Excel.

- Frequency: Daily or Weekly.

Step 2: Save Export to Shared Folder

- Designate a shared drive or secure OneDrive/SFTP folder.

- Ensure consistent file naming (e.g., Signatera_Export.csv).

Step 3: Power BI Connection

- Open Power BI Desktop.

- Connect to the shared folder using 'Folder' as data source.

- Load and transform the file using Power Query.

Step 4: Enable Scheduled Refresh

- In Power BI Service, publish the dashboard.

- Use Power BI Gateway to enable scheduled refresh.

- Confirm refresh frequency (daily/weekly) and test.

Optional: Advanced Integration

- Use Flatiron API or SQL connection for live refresh.

- Secure credentials via Azure Key Vault or local config.