



Dashboard and Portals: Tailoring the User's View (and the Users)

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Agenda

- Authors
- About RTI International
- Services Accountability Improvement System
- Our Dashboard Journey
- Traditional vs. Dashboard Security
- Ways of tailoring the Dashboard View
- Users, Roles, Resources and Permissions
- Questions

Authors

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RTI – Who we are?



- Founded in 1958
- One of the world's leading non-profit research institutes
- HQ - Research Triangle Park, North Carolina
- More than 3800 staff in more than 40 countries
- Mission – Improve human condition by “turning knowledge into practice”

Introduction to SAIS

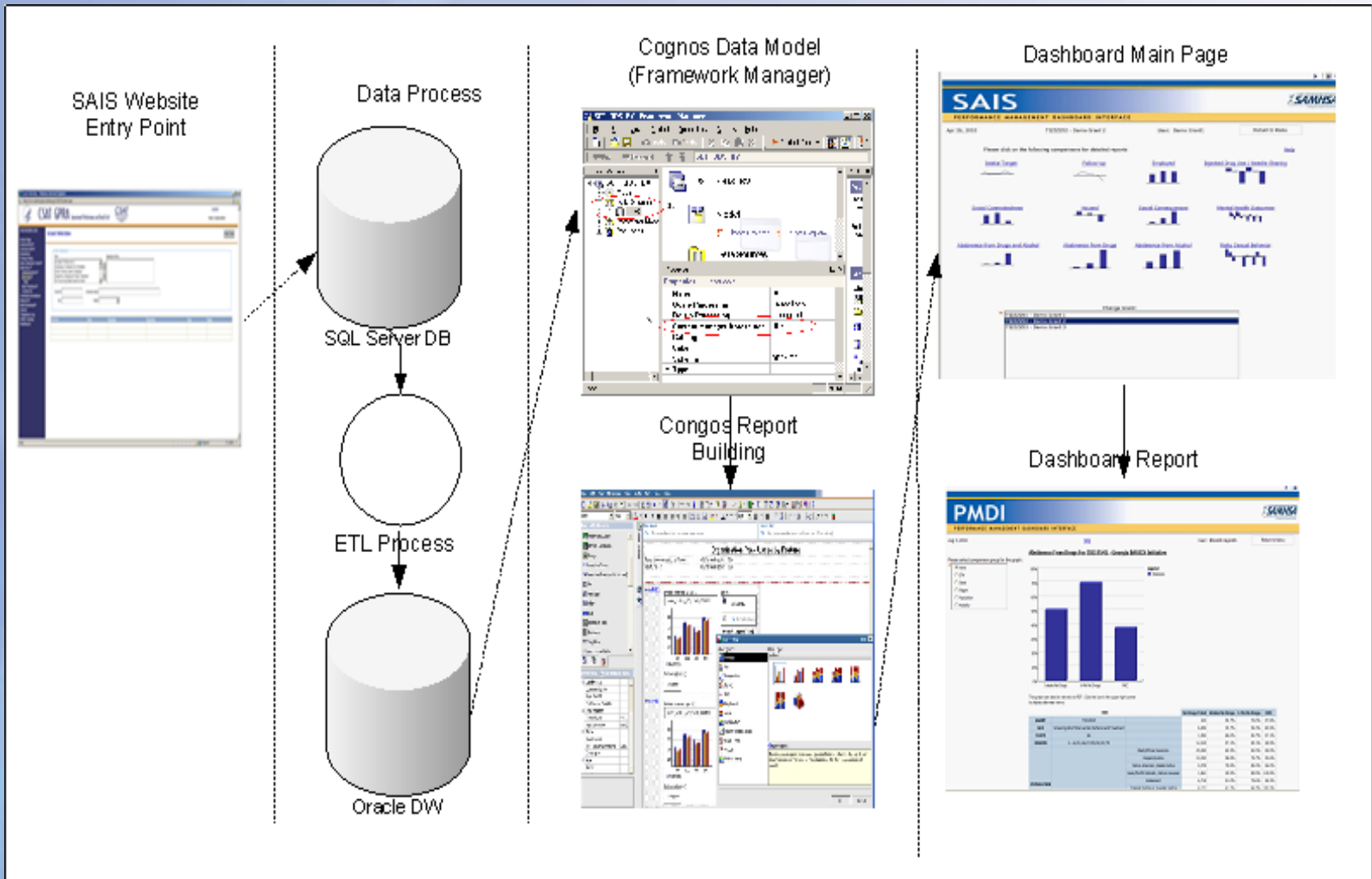
- Government Performance and Results Act (GPRA) of 1993
- Substance Abuse and Mental Health Services Administration (SAMHSA)
- Center for Substance Abuse Treatment (CSAT)
- Service Accountability Improvement System (SAIS)

Introduction to SAIS

- SAIS is a real time performance management system that captures interview information on substance abuse treatment services delivered in the U.S.
- The information is presented in various forms such as reports and **dashboards** where users in various roles get a different view of the report or dashboard.

Dashboard Journey

- **2 Releases**
 - Release 1.0 (PMDI) – May 2010
 - Release 2.0 (CDR) - April 2011
- **Technologies Used**
 - Cognos 8.4
 - Oracle 10G



Traditional Vs Dashboard security

Traditional Security

- Locking down data sources
- Firewall Security
- Restricting web access

Dashboard Security

- Only on presentation layer
- Focused on presenting specific data or resources to users based on their role and access.

Ways of Tailoring the Dashboard View

- Users
- Groups and Roles
- Resources
- Permissions

Users and Roles

- **Users**
 - Identified through unique credentials
 - Initially every user has unrestricted access
 - Layers of Security are added later based on roles
- **Roles**
 - Group of users
 - Access to same resources with same permission
 - Access to relevant data can be given via filters

Resources and Permissions

- **Resources**
 - Web Page
 - Functionalities (Such as email, export etc.)
 - Alteration of configuration files
- **Permission**
 - Rules for allowing access to a specific resource
 - Ex: Access to a specific folder or functionality
 - Can be explicitly “Granted” or “Denied”

Release 1.0 - PMDI

- Tool designed to assess program performance
- Graphical Interface that simplified critical information
- Usage of micro graphs for quick selection
- One interface to run multiple reports
- Single view for all the users
- User and Role based security applied in Data Model
- Usage of Filters to limit the data accessible by users

Release 1.0 – Main Page

Dashboard

SAIS

PERFORMANCE MANAGEMENT DASHBOARD INTERFACE

SAMHSA
A Life in the Community for Everyone
Substance Abuse and Mental Health Services Administration
U.S. Department of Health and Human Services

Return to Menu CLICK HERE TO RUN

Please Select a Grant.

- TIZZZZ01 - DEMO GRANT 1
- TIZZZZ02 - DEMO GRANT 2
- TIZZZZ04 - DEMO GRANT 4

Release 1.0 – Micro Graphs













Dashboard

SAIS

PERFORMANCE MANAGEMENT DASHBOARD INTERFACE

Mar 8, 2011 TIZZZZ04 - DEMO GRANT 4

Please click on the following comparisons for detailed reports [Help](#)

Intake Target 	Follow-up 	Employed 	Injected Drug Use / Needle Sharing 
Social Connectedness 	Housed 	Social Consequences 	Mental Health Outcomes 
Abstinence from Drugs and Alcohol 	Abstinence from Drugs 	Abstinence from Alcohol 	Risky Sexual Behavior 

Change Grant:

- TIZZZZ01 - DEMO GRANT 1
- TIZZZZ02 - DEMO GRANT 2
- TIZZZZ04 - DEMO GRANT 4**

Release 1.0 – Drill Down

SAIS
PERFORMANCE MANAGEMENT DASHBOARD INTERFACE

Mar 8, 2011
[Help](#)

Please select comparison group for the graph:

- None
- GFA
- State
- Region
- Population
- Modality

Employment For TIZZZZ04 - DEMO GRANT 4

Category	TIZZZZ04 (%)	CA (%)
Intake Employed	87.2%	46.5%
6 Mo Employed	86.5%	54.5%
ROC Employed	-0.8%	22.8%

This graph can also be viewed via PDF. Click the icon in the upper right corner to display alternate views.

		Employed Total	Intake Employed	6 Mo Employed	ROC Employed
GRANT	TIZZZZ04	3,261	87.2%	86.5%	-0.8%
GFA	Access To Recovery 2	57,049	35.5%	51.1%	43.9%
STATE	CA	9,664	46.5%	54.5%	17.1%
REGION	9 - AZ,CA,HI,NV,AS,FM,GU,MH,MP,PW	12,537	44.5%	54.6%	22.8%

Release 2.0 - CDR







- Addition of new tab with links to multiple reports
- Different Tab and Report Display based on user role
- Addition of “My Folders” tab – A personalized area for individual user
- Security based on User, Roles, Permission and Resources

Release 2.0 – Security Features

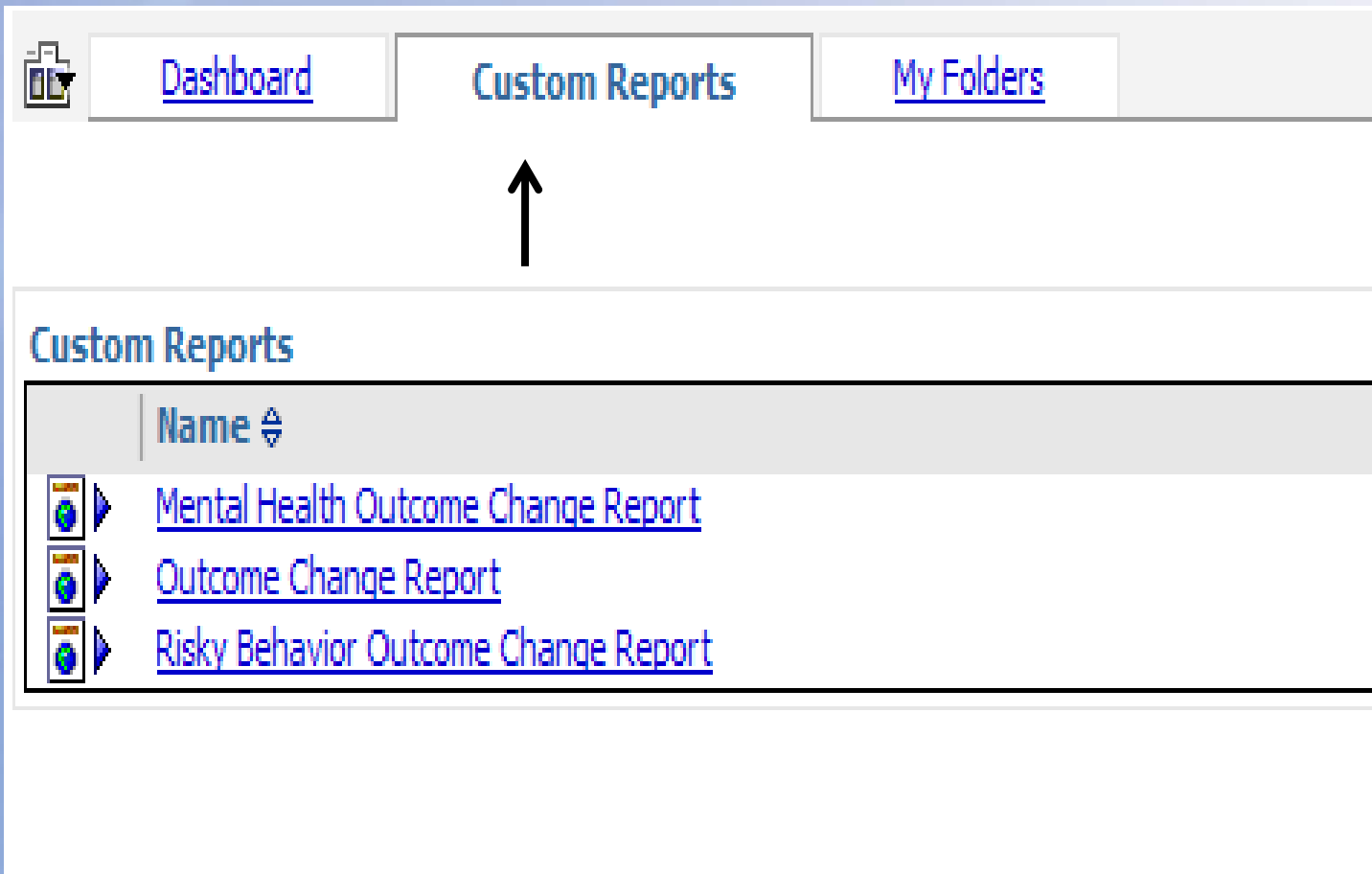
- Usage of Users, Roles, Permission and Resources to secure the view and information
- Creation of Default User profile with most restricted view
- Alteration of configuration file to restrict the access of built-in functions

Release 2.0 - Admin View




The screenshot shows a web browser window titled "Reports - IBM Cognos Connection - Windows Internet Explorer". The address bar contains the URL: https://www.samhsa-gpra-cognosreports.samhsa.gov/cognos8/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/cc.xts&tab=iAB6A4A07D54D4EC6B73681B92B1E88F0. The navigation bar includes "Dashboard", "Reports", and "My Folders". The main content area is titled "Reports" and contains a table with the following data:

	Name ↕
	Demographics Report
	Mental Health Outcome Change Report
	Missing 6 Month Follow Up Report
	Outcome Change Report
	Risky Behavior Outcome Change Report
	Top Five Substances Report

Release 2.0 – Grantee View



The screenshot displays a web application interface with a navigation bar at the top containing three tabs: [Dashboard](#), [Custom Reports](#), and [My Folders](#). A black arrow points upwards from the [Custom Reports](#) section to the [Custom Reports](#) tab. Below the navigation bar, the [Custom Reports](#) section is expanded, showing a table with a header row labeled [Name](#) and a diamond icon. The table contains three rows, each with a globe icon and a right-pointing triangle:

	Name ◆
	Mental Health Outcome Change Report
	Outcome Change Report
	Risky Behavior Outcome Change Report

Release 2.0 - Personalization

- “My Folders” tab
- Personalized area for individual user
- Ability to save reports with frequently used selections
- Ability to organize reports by creating folders

Release 2.0 – My Folders View

My Folders - IBM Cognos Connection - Windows Internet Explorer

https://www.samhsa-gpra-cognosreports.samhsa.gov/cognos8/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/cc.xts&tab=i4573F7559CDD45399C162728F2B2E983&m_folder=i4573F7559CDD45399C

Dashboard Reports **My Folders**

My Folders

Entries: 1 - 2

<input type="checkbox"/>	Name ↕	Modified ↕	Actions
<input type="checkbox"/>	Favorites	March 13, 2012 9:47:40 PM	More...
<input type="checkbox"/>	MonthlyReports	March 13, 2012 9:47:56 PM	More...

Done Internet 175%

Benefits

- Allow users to easily customize the most popular SAIS reports
- Reduce grantee requests to SAIS for custom reports
- Cut response time for many ad hoc requests
- Make it easier for SAMHSA staff to run ad hoc reports

Contact Information

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