

Welcome to the Results Report Security

We Will Begin Shortly

Meet Your Trainer

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Learning Objective

This session will support users in understanding the various security features that impact data returns within reports built on the Results platform.

Agenda

Reporting Roles

TouchPoint Security

Filters in Reports

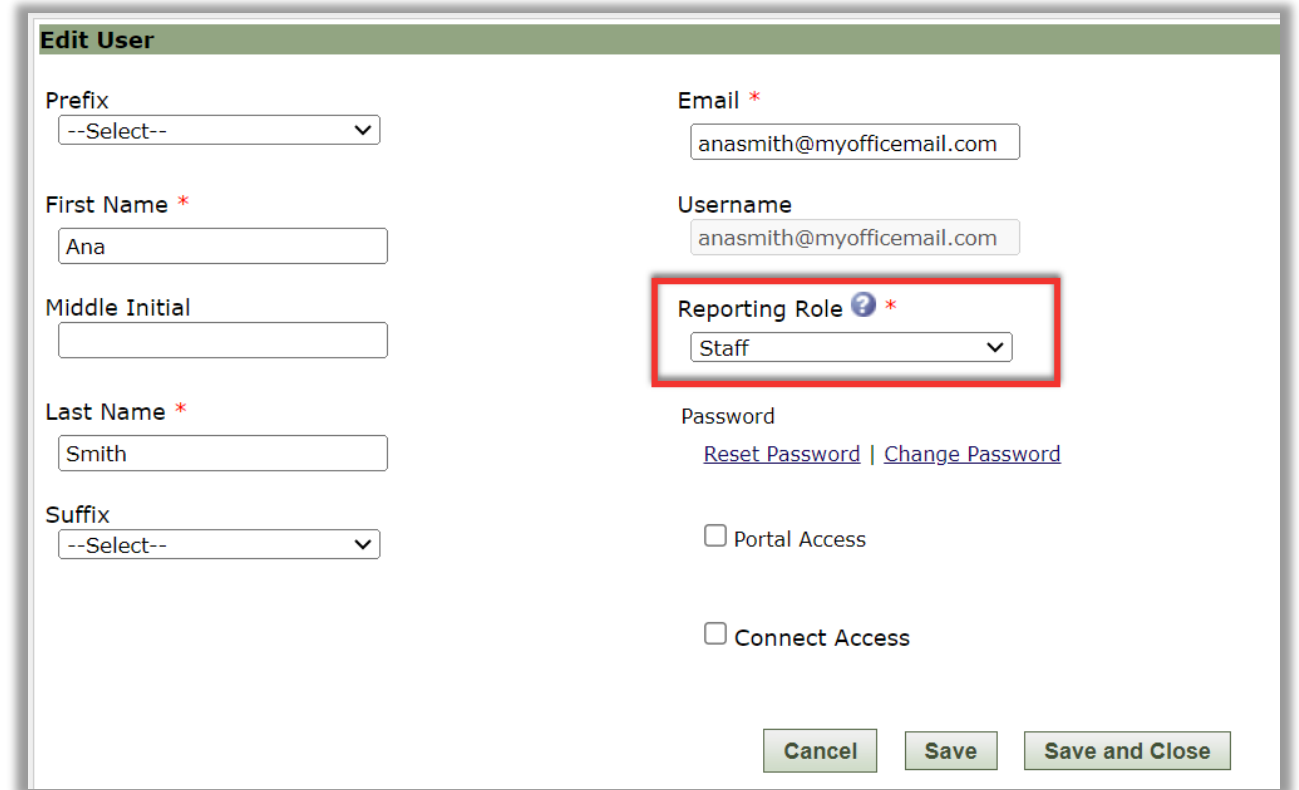
Reporting Roles

Reporting Roles

Assigned by Admin

Impacts data visibility in reports

Can differ from user role



The screenshot shows the 'Edit User' form with the following fields and values:

- Prefix: --Select--
- First Name *: Ana
- Middle Initial:
- Last Name *: Smith
- Suffix: --Select--
- Email *: anasmith@myofficemail.com
- Username: anasmith@myofficemail.com
- Reporting Role *: Staff (highlighted with a red box)
- Password: [Reset Password](#) | [Change Password](#)
- Portal Access
- Connect Access

Buttons at the bottom: Cancel, Save, Save and Close.

Reporting Roles

3 Types

Enterprise Manager

Edit User

Prefix --Select--	Email * anasmith@myofficemail.com
First Name * Ana	Username anasmith@myofficemail.com
Middle Initial 	Reporting Role ? * Enterprise Manager
Last Name * Smith	Password Reset Password Change Password
Suffix --Select--	<input type="checkbox"/> Portal Access
	<input type="checkbox"/> Connect Access

Cancel Save Save and Close

Reporting Roles

3 Types

Enterprise Manager

Site Manager

Edit User

Prefix	--Select--	Email *	anasmith@myofficemail.com
First Name *	Ana	Username	anasmith@myofficemail.com
Middle Initial		Reporting Role ? *	Site Manager
Last Name *	Smith	Password	Reset Password Change Password
Suffix	--Select--	<input type="checkbox"/> Portal Access	
		<input type="checkbox"/> Connect Access	

Reporting Roles

3 Types

Enterprise Manager

Site Manager

Staff

Edit User

Prefix --Select--	Email * anasmith@myofficemail.com
First Name * Ana	Username anasmith@myofficemail.com
Middle Initial 	Reporting Role ? * Staff
Last Name * Smith	Password Reset Password Change Password
Suffix --Select--	<input type="checkbox"/> Portal Access
	<input type="checkbox"/> Connect Access

Cancel Save Save and Close

Reporting Roles

Managed via Manage User Accounts

Open desired User Account in the Edit view

Select desired Reporting Role

Edit User 2

Prefix
--Select--

First Name *
Ana

Middle Initial
[]

Last Name *
Smith

Suffix
--Select--

Email *
anasmith@myofficemail.com

Username
anasmith@myofficemail.com

3 Reporting Role ? *
Site Manager

Password
[Reset Password](#) | [Change Password](#)

Portal Access

Connect Access

[Cancel](#) [Save](#) [Save and Close](#)

Site/Program Access | Caseload Access | Summary of All Access | Linked External Accounts

Site
May 2024 Admin Foundations

Role *
Program Manager

Default Program

TouchPoint Security

TouchPoint Security

- Unique to each TouchPoint

Security for School Engagement Scale

Add/View/Edit/Delete Own Responses View/Edit/Delete Others' Responses Share Responses Within Site

Share Responses Across Enterprise Manage

Add Responses View Own Responses Edit Own Responses Delete Own Responses

Participant ▼ [Return to Managing School Engagement Scale](#) [Save](#)

Note: Changes will not be saved until you click "Save". Clicking the checkbox will not save the changes to security.

Select the user roles in each program that should be allowed to **add responses**.

Include disabled sites and programs

Apply settings to View, Edit, Delete sub tabs [?](#)

Site
<input type="checkbox"/> Site: April 2024 Admin Foundations
<input type="checkbox"/> Site: ETO Admin HOL

TouchPoint Security

- Unique to each TouchPoint
- Managed on Multiple Levels
 - View Own
 - Share Across Enterprise*

Security for School Engagement Scale

Add/View/Edit/Delete Own Responses | **View/Edit/Delete Others' Responses** | Share Responses Within Site | Share Responses Across Enterprise | Manage

Add Responses | **View Own Responses** | Edit Own Responses | Delete Own Responses

Participant

Note: Changes will not be saved until you click "Save". Clicking the checkbox will not save the changes to security.

There are unsaved changes. Please click "Save" to keep your changes.

Select the user roles in each program that should be allowed to **view their own responses**.

Include disabled sites and programs

Site	Enterprise Manager	Site Manager	Department Head	Program Manager	Staff	Funders/Reports Only	Intake	Survey Taker	Entity Self Service
<input type="checkbox"/> Program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Chasity's Children's Center	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Lacey's Living Well	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

TouchPoint Security

- Unique to each TouchPoint
- Managed on Multiple Levels
 - View Own
 - Share Across the Enterprise
- Can vary per Subject & Site

Security for School Engagement Scale

Add/View/Edit/Delete Own Responses View/Edit/Delete Others' Responses Share Responses Within Site Share Responses Across Enterprise Manage

Add Responses **View Own Responses** Edit Own Responses Delete Own Responses

Participant (multiple) [Return to Managing School Engagement Scale](#) [Save](#)

Note: Changes will not be saved until you click "Save". Clicking the checkbox will not save the changes to security.

Select the user roles in each program that should be allowed to **view their own responses**.

Include disabled sites and programs

Site	Enterprise Manager	Site Manager	Department Head	Program Manager	Staff	Funders/Reports Only	Intake	Survey Taker	Entity Self Service
<input type="checkbox"/> Program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Chasity's Children's Center	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Filters in Reports

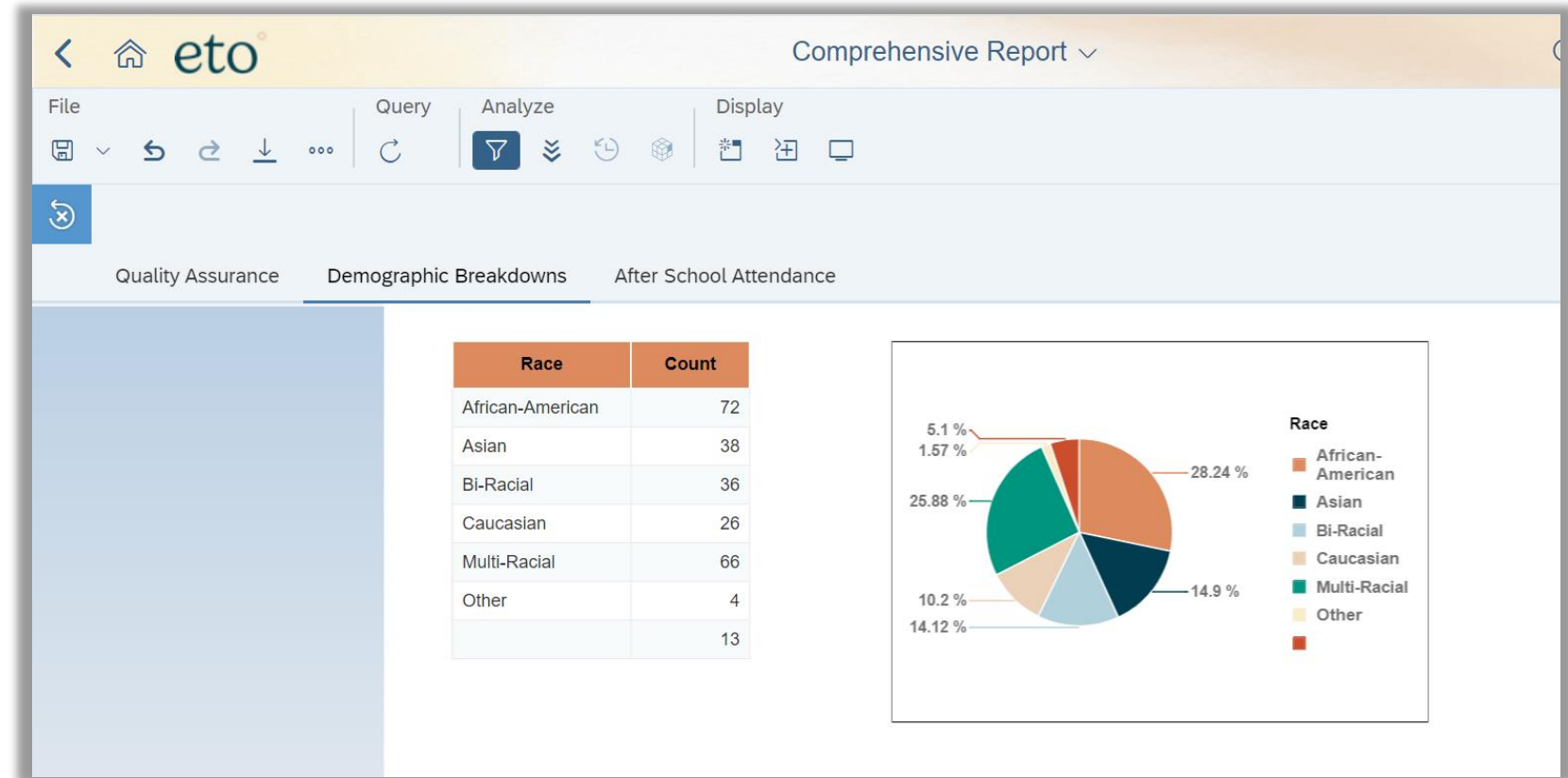
Filters in Reports

3 Types

Query Filters

Report Filters

Input Controls



Filters in Reports

Query Filters

Built on Query Panel

Impact entire report

Often have prompts

The screenshot displays the 'eto' interface with a 'Prompts' dialog box open. The dialog title is 'Prompts' and it contains a search bar with the text 'Search or enter value(s) manually'. Below the search bar is a list of 'Program Name LOVs' with checkboxes next to each item. The items are: Services Program, Intake - Reentry, After School, Parents As Teachers (checked), Intake and Screening, HOL Instructor Program (checked), Program 20, LCT Super Hero Program, Connect Program 1, Program 3, and mental health services AI. A red box highlights the search bar and the two checked items. The background shows a report interface with a search bar and a list of filters. The 'Prompts' dialog has a 'Run' button and a 'Cancel' button at the bottom right. The background interface has a 'Reset All' button at the bottom left.

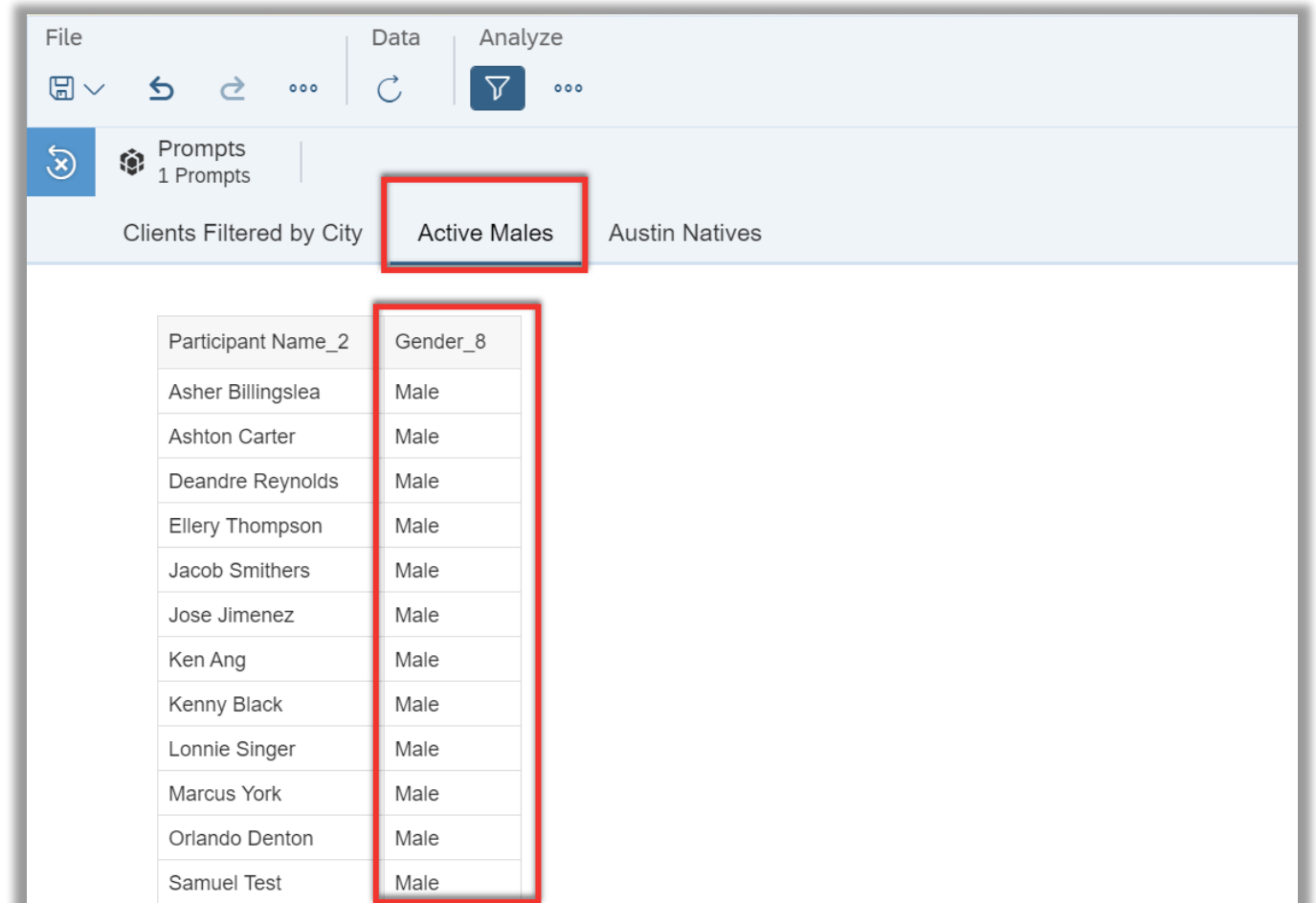
Filters in Reports

Report Filters

Not visible to users viewing report

Apply to selected cells, tables and or report tabs

May be labeled in Report Tab Name



The screenshot shows a software interface with a top navigation bar containing 'File', 'Data', and 'Analyze' menus. Below the navigation bar, there are icons for undo, redo, and refresh. A filter icon (a funnel) is highlighted with a red box. Below the navigation bar, there are three report tabs: 'Clients Filtered by City', 'Active Males', and 'Austin Natives'. The 'Active Males' tab is highlighted with a red box. Below the tabs, there is a table with two columns: 'Participant Name_2' and 'Gender_8'. The 'Gender_8' column is highlighted with a red box. The table contains the following data:

Participant Name_2	Gender_8
Asher Billingslea	Male
Ashton Carter	Male
Deandre Reynolds	Male
Ellery Thompson	Male
Jacob Smithers	Male
Jose Jimenez	Male
Ken Ang	Male
Kenny Black	Male
Lonnie Singer	Male
Marcus York	Male
Orlando Denton	Male
Samuel Test	Male

Filters in Reports

Input Controls

Interactive

Visible in the Filter Bar

Can be set to display all values

The screenshot shows a report interface with a filter bar. The filter bar has a dropdown menu for 'City' with the text 'All Values' and a search bar. The dropdown menu is open, showing a list of cities with checkboxes: All, Austin, Lago Vista, Leander, Round Rock, San Antonio, San Marcos, and [NULL_VALUE]. The 'All' option is selected. The background shows a table with columns for Date of Birth, Gender, Primary Language, and Line 1. The table data is as follows:

Date of Birth_95	Gender_8	Primary Language_498	Line 1
0/1/78	Male	English	
5/17/81	Male		
3/16/85	Male		
3/12/90	Female		
8/8/88	Male		
450	Luther Henderson		
452	Lonnie Mitchell		
9/9/95	Male		

Additional Resources

Additional Training Opportunities

- [Knowledge Base](#) – How-To Articles (Search Chat or Visit Online)
- [Bonterra Academy](#) – Free Webinars & Recordings
- [Foundations](#) – Intensive, Multiday Courses to Cover Admin Basics
- [Admin Labs](#) – 2 Hour Live Trainings on Specific Capabilities



Build confidence & knowledge in
our software!

Customer Support

Reach out to our Customer Support Team with Questions or Concerns.

Weekdays 7am – 7pm CST via chat or through email: eto@bonterratech.com

Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!



Thank you for attending!

We hope to see you
in future trainings.