Designing, building, and deploying an interactive survey monitoring dashboard using R Shiny

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Examples for this presentation come from the National Longitudinal Study of Adolescent to Adult Health (Add Health)

Add Health is funded by the Eunice Kennedy Shriver National Institute of Child Health and Human Development and conducted by the University of North Carolina Population Center in partnership with RTI International.

Data presented here do not reflect actual Add Health estimates. The data were perturbed in many examples to protect the confidentiality of the study participants.
Summary

Presentation outline

- Motivation
- Static visualizations
- Interactive visualizations
- R and Shiny
- Structure (code, data, taxonomy)
- Deployment and hosting
- Benefits
- ATD Dashboard demo
- Next steps
Challenges in complex survey management

- How best to define “success” metrics
- How best to track progress toward project-defined goals
  - response rate
  - budget
  - schedule
- How to simultaneously monitor multiple (case / interviewer / data) management systems
- How to interpret reams of tabular data which may obfuscate trends or patterns
Adaptive Total Design (ATD)

- Process to identify and monitor key features of a survey design that are critical to data quality
- Similar to responsive design and adaptive design
- Regular monitoring of data
- Goal of ATD is to minimize total survey error and costs
- Allocates resources to maximally control errors and costs
Continuous Quality Monitoring

- Start with “what metrics are key to the success of our survey?”
- Determine what other factors might affect that success
- Generate a plan for regular (real-time / hourly / daily) monitoring of data

- All this is important if:
  - Your goal is to minimize total survey error and costs
  - You need to determine if / when interventions will be applied
  - You need to assess and project the outcomes of experiments during data collection
Motivation

Data visualization: critical tool

- Visualizations enable certain data to be compressed, rapidly interpreted, and easily distributed
Static visualizations: response rates by mode protocol

SOURCE: Murphy, Biemer, and Berry, 2016
Static visualizations: response rates by mode protocol

- Limit number of lines
- Use patterns for black/white printing

SOURCE: Murphy, Biemer, and Berry, 2016
Static visualizations: response rates by mode protocol

Simple, readable axes and legends

SOURCE: Murphy, Biemer, and Berry, 2016
Static visualizations: response rates by mode protocol

Maximize the data-ink ratio (proportion of ink used to show data)

SOURCE: Murphy, Biemer, and Berry, 2016
Interactive visualizations

Goals

- Allow users to create custom views
- Enable ability to subset data, modify display (pan, zoom, hover), and export views
- Flexibly incorporate disparate input data (e.g., survey level, respondent level, interviewer level)
- Provide web hosting for project and client teams
- Provide quick and easy setup for projects
- Minimize user burden at every step
Interactive visualizations

Solution

- Custom-built visualization platform programmed in **R** and **Shiny**: ATD Dashboard

  - Shiny is an R package that provides a **high-level language for web application development**; avoids explicit HTML / CSS / JavaScript programming

  - Can leverage robust set of packages from the R community; easily incorporate modeling

  - Allows for hosting behind secure firewall with Shiny Server

- Open source and free platform (cf. Tableau)
### Shiny application code architecture

- Implemented in R; however, users do not need to interface with the underlying code
- Reactive components (observe and report)

<table>
<thead>
<tr>
<th>Server</th>
<th>User Interface (UI)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details <strong>logic</strong> and <strong>analyses</strong> (functions)</td>
<td>Interacts with server file</td>
</tr>
<tr>
<td>Generates <strong>warnings</strong> (passed to UI)</td>
<td>Details, displays, and <strong>dynamically updates UI</strong>, depending on a user’s selections</td>
</tr>
<tr>
<td>Produces <strong>plots</strong></td>
<td>Displays <strong>warnings</strong></td>
</tr>
</tbody>
</table>
Data structure

- Input data in **flat-file format** (csv file)
- Long (stacked) data
- Metadata information included in “**blocked**” sections at file head
  - Block for **critical dates** (axis markers)
  - Block for **data taxonomy**

Example data

<table>
<thead>
<tr>
<th>study</th>
<th>id</th>
<th>var</th>
<th>val</th>
<th>dt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Health Wave V Sample 2a</td>
<td>5237119</td>
<td>Device Type</td>
<td>PC</td>
<td>20-Mar-17</td>
</tr>
<tr>
<td>Add Health Wave V Sample 2a</td>
<td>5237674</td>
<td>Device Type</td>
<td>PC</td>
<td>17-Mar-17</td>
</tr>
<tr>
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<td>Mobile</td>
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<tr>
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<td>5238472</td>
<td>Device Type</td>
<td>Mobile</td>
<td>15-Mar-17</td>
</tr>
<tr>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
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</tbody>
</table>
Data taxonomy

- Provides **compact attribute vocabulary**, easy to input into flat file
- Provides mechanism to limit UI selection options to **only logical combinations** and invoke **variable mathematical operations**
- Mapped to data in csv file

Type-class system

```
Level
Unconstrained value:
samp  (sample)
int   (interviewer)
event (event)

Stage
pre    (preload)
out    (outcome)
sub    (subset and outcome)
all    (all units)

Type
ind    (indicator)
cat    (categorical)
um    (numeric)
cnum   (cumulative numeric)
```

samp_out_cat
(Device Type)
## Data

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## Map

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</tr>
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<tbody>
<tr>
<td>Add Health Wave V Sample 2a</td>
<td></td>
<td>C:Undeliverables</td>
<td>samp_out_ind</td>
<td></td>
</tr>
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<td></td>
<td>C:Completion Mode</td>
<td>samp_out_cat</td>
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<td></td>
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</table>
UI drop-down options reactively updated to allow logical combinations, conditioned on prior selections

Choose **plot type**

Select primary **outcome of interest**  
\[\text{samp\_out\_cat}\]

Filter to **subset**  
(e.g.,  
\[\text{samp\_sub\_ind}\]

Filter to (second) **subset**

**Separate** outcome into categories  
\[\text{samp\_out\_cat}\]
Deployment and hosting

Shiny Server

- Apps deployed with RStudio Shiny Server, hosted on local or remote computers

- Can be deployed to the web or shared within a closed network behind a firewall with authentication for site access

- For reproducibility and to aid in future deployment to other servers, both R Shiny Server and an NGINX web server (used as a reverse proxy to redirect requests) were configured and deployed in Docker containers
ATD Dashboard Examples
Daily Cumulative Rate of Completed Cases, by Prenotice

- **Receives Prenotice**
  - Day: 63
  - Value: 38.9

- **No Prenotice**
  - Day: 63
  - Value: 34.0

- **Projected Completion Rate**
  - Day: 63
  - Value: 30.5

Day 63: Postcard Reminder 2
Conclusion

Reception

- **Internal** users: continual monitoring of data collection helpful for discussions related to production goals and strategies within the current sample (i.e. use of and timing of additional mailings)

- **External** users: format of “everything on a page” found to be useful to get up to speed with the current results at a glance and be prepared to discuss implications for the design of future samples with the internal team
Conclusion

Impact

- At the beginning of a study, it can be a challenge to define the key metrics for data collection
- More flexibility in monitoring and planning for future sample releases
- Many potential metrics and narrowing it down can be difficult
- Having the dashboard and needing to decide what to monitor spurred conversations about goals that might not otherwise have taken place
Conclusion

Summary of benefits

- Ability to monitor survey in near real time for decision making
- Only most important information (not reams of tables) displayed
- Leverages best practices in graphic design
- Non-programmer team members can gain insights from data; clients can interact with data directly
- No licenses required for individuals
- Codebase is reusable, easily transportable
- Codebase is easily extensible, thanks to R
- Dashboards can be shared across organization, avoiding costly licensing fees

Next steps

- Incorporate weighted data and statistical tests
- Pull-up data tables
- Allowing multiple layers of graphs
Contact

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