CORES® Quick Reference Guide

Sent Messages Display Filter

Overview

The **Sent Messages Reporting by Containers** functionality provides statistical information regarding the delivery of and response to messages. Containers are collections of recipients, categorized as individuals, administrators, groups, organizations, search results, external recipients, mailing lists (ANS), or roles (HAN).

When viewing a sent message, you have several options for filtering the data, including by recipient container, delivery status, and delivery method.

Display Filters

When viewing sent messages, there are two display filters you can use to organize container data: **Basic** and **Advanced**. Both filters organize data in tabular format; however, the details the filters return vary.

Basic Filter

The basic filter returns the list of message recipients, the date and time of the last attempt to contact them (regardless of the method used to contact them), the total number of attempts to contact them, and if applicable, the response each selected.

Advanced Filter

The advanced filter shows a list of all methods used to attempt to contact each recipient. The list also shows you the date and time the recipient responded to that method or the status if the recipient did not respond to that method.

You can filter the data set by the **Delivery Method**, which is the reason the filtered list includes details relevant to delivery methods and devices.

Filter Options

Display filters allow you to analyze the sent message data from different perspectives. In addition to the **Filter Type**, you can also view the data by **Recipient Container**, **Delivery Status**, **Response Time**, and on the advanced filter, the **Delivery Method**. These options help you identify the accuracy of contact data, the success of delivery methods, the number of responses, and the anticipated response time of recipients.

> **Tip**: A complete list of status and response definitions is available through the online Help; refer to the topic Delivery Statuses and Responses.

Comparison of Basic and Advanced Filters

Field	Examples*	Basic	Advanced
Recipient Container	- Hospitals - Department of Health - Administrators - Individuals - External Recipients	Yes	Yes
Delivery Status	- Responded: All - Responded: (custom value) - Contacted: No Response - Delivery Failed - Not Contacted	Yes	Yes
Response Time	<15 16-30 31-45 - All Responses - No Response	Yes	Yes
Delivery Method	- Home Phone - Mobile Phone - Phone (All) - Pager - SMS/Text Msg - Email - Internal - All	No	Yes
* Examples are configurable default values that may be different in your system.			

Important: Display filter data is not automatically refreshed. To make sure you are viewing the latest information, return to the message's summary details page, locate the appropriate link, and click it again.

Filter by Delivery Status

The **Delivery Status** field allows you to view recipients according to their response or delivery status.

When you use the **Advanced** filter, the **Delivery Status** list does not offer filtering by the advanced status options that appear in the **Response/Status** column, such as **Automated Response**, **Disconnected**, **Left Message**, or **Sending Failed**.
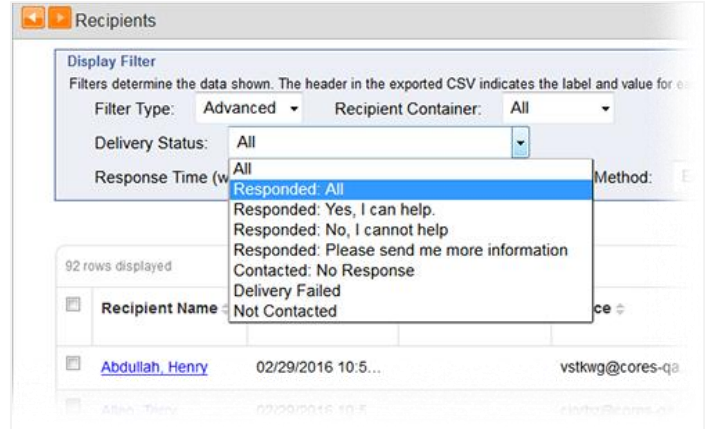

However, you can export your filter results and then filter by the appropriate value in the CSV (comma-separated value) file.

Examples

To exemplify the filtering options, consider the following scenario in which a message was sent to 175 individual recipients in nine containers, through five methods, and offering two response options.

Using the *Display Filter* options, you can see that four people from Mercy Hospital (**Recipient Container**) responded via their work phones (**Delivery Method**) in fewer than 15 minutes (**Response Time**).
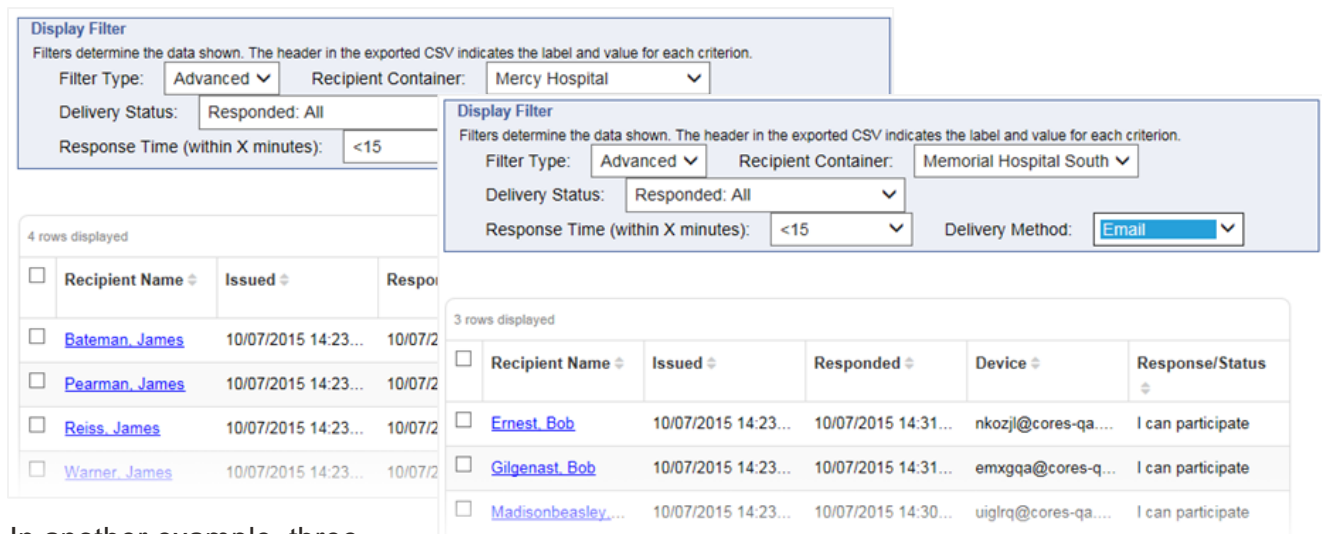
In another example, three people from Memorial Hospital South (**Recipient Container**) responded by email (**Delivery Method**) in fewer than 15 minutes (**Response Time**).

Information about Recipients

A recipient's name is a link to their profile if they have an enabled account. This link is not available for external users because their contact information does not exist within the system.
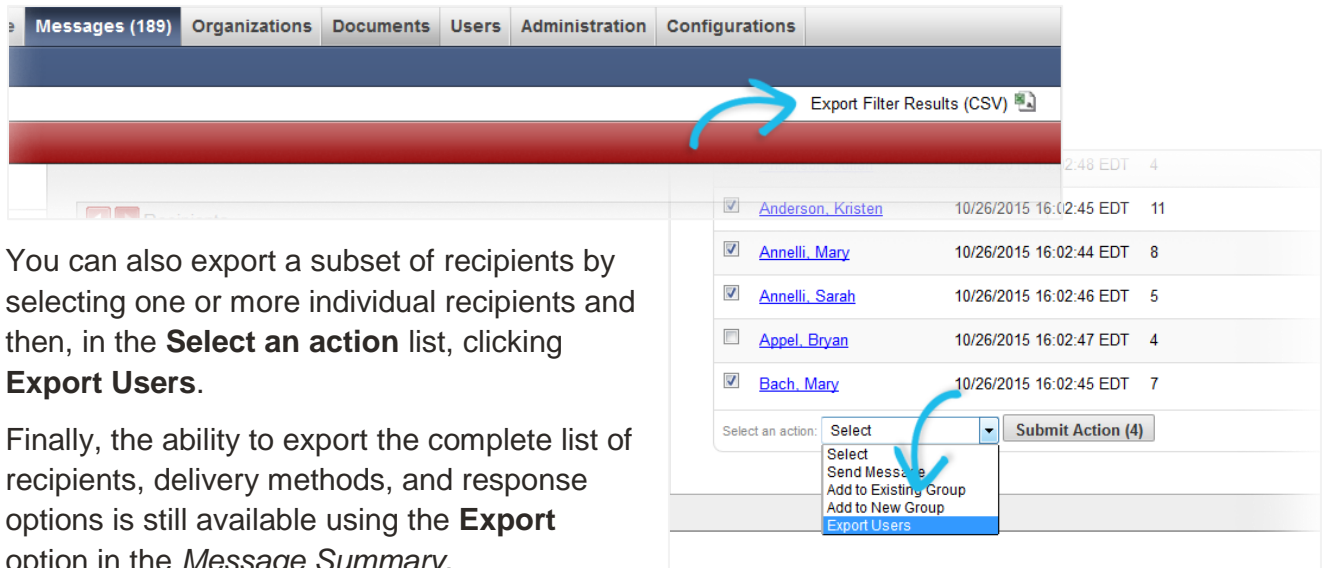
Information about external users is limited, so it may be useful to add external users to the system if you want to track their response data along with other recipient data.

Exporting Results

Filtering is especially important when you want to export a list of recipients. Display filter results can be exported for further review and analysis by clicking **Export Filter Results (CSV)** in the upper right corner.

You can also export a subset of recipients by selecting one or more individual recipients and then, in the **Select an action** list, clicking **Export Users**.

Finally, the ability to export the complete list of recipients, delivery methods, and response options is still available using the **Export** option in the *Message Summary*.

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