

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.

Display Filter
Filters determine the data shown. The header in the exported CSV indicates the label and value for each criterion.

Filter Type: Basic Recipient Container: All

Delivery Status: All

Response Time (within X minutes): All

175 rows displayed			
<input type="checkbox"/>	Recipient Name	Last Attempt	Number of Attempts
<input type="checkbox"/>	Abney, Alexander	10/07/2015 14:23:15 E...	4
<input type="checkbox"/>	Abney, William	10/07/2015 14:23:14 E...	9
<input type="checkbox"/>	Adelsberg, James	10/07/2015 14:23:15 E...	6
<input type="checkbox"/>	Adelsberg, Mary	10/07/2015 14:23:14 E...	1
<input type="checkbox"/>	Allee, James	10/07/2015 14:23:14 E...	4

Display Filter
Filters determine the data shown. The header in the exported CSV indicates the label and value for each criterion.

Filter Type: Advanced Recipient Container: All

Delivery Status: All

Response Time (within X minutes): All Delivery Method: All

971 rows displayed					
<input type="checkbox"/>	Recipient Name	Issued	Responded	Device	Response/Status
<input type="checkbox"/>	Abney, Alexander	10/07/2015 14:2...		dlpskx@cores-q...	Responded
<input type="checkbox"/>	Abney, Alexander	10/07/2015 14:2...		dlpskx@cores-q...	Left message
<input type="checkbox"/>	Abney, Alexander	10/07/2015 14:2...	10/07/2015 14:4...	5555556282	I can participate
<input type="checkbox"/>	Abney, Alexander	10/07/2015 14:2...		5555556282	Left message
<input type="checkbox"/>	Abney, William	10/07/2015 14:2...		5555553319	Disconnected, b...
<input type="checkbox"/>	Abney, William	10/07/2015 14:2...		rahbxj@cores-qa...	Left message
<input type="checkbox"/>	Abney, William	10/07/2015 14:2...		5555553667	Responded

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

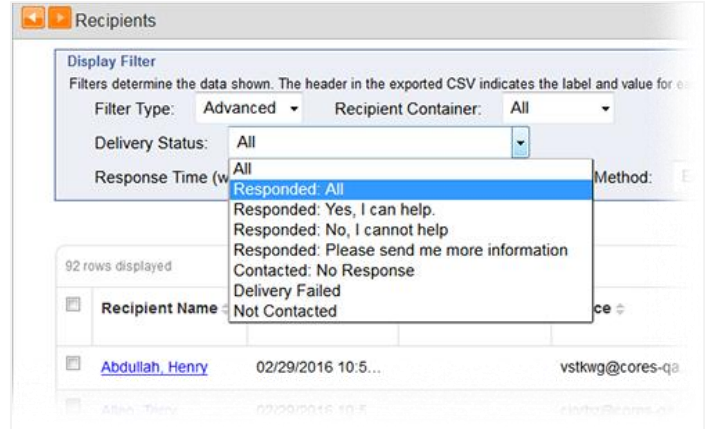
Field	Examples*	Basic	Advanced
Recipient Container	<ul style="list-style-type: none"> Hospitals Department of Health Administrators Individuals External Recipients 	Yes	Yes
Delivery Status	<ul style="list-style-type: none"> Responded: All Responded: (custom value) Contacted: No Response Delivery Failed Not Contacted 	Yes	Yes
Response Time	<ul style="list-style-type: none"> <15 16-30 31-45 All Responses No Response 	Yes	Yes
Delivery Method	<ul style="list-style-type: none"> 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**.

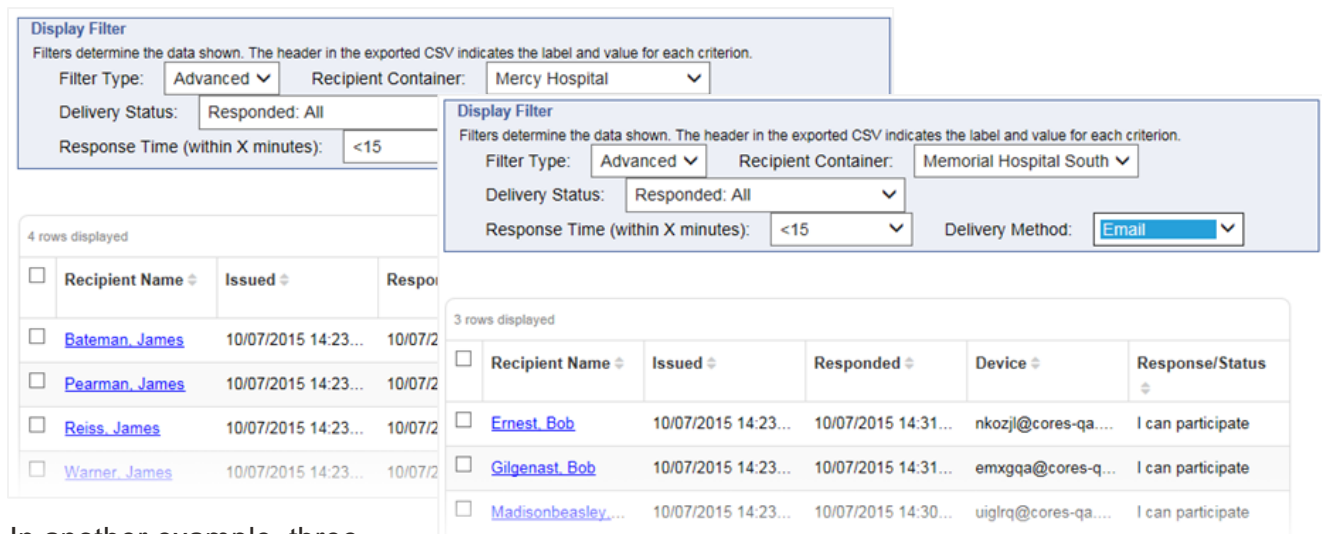


However, you can export your filter results and then filter by the appropriate value in the CSV (comma-separated value) file.

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.

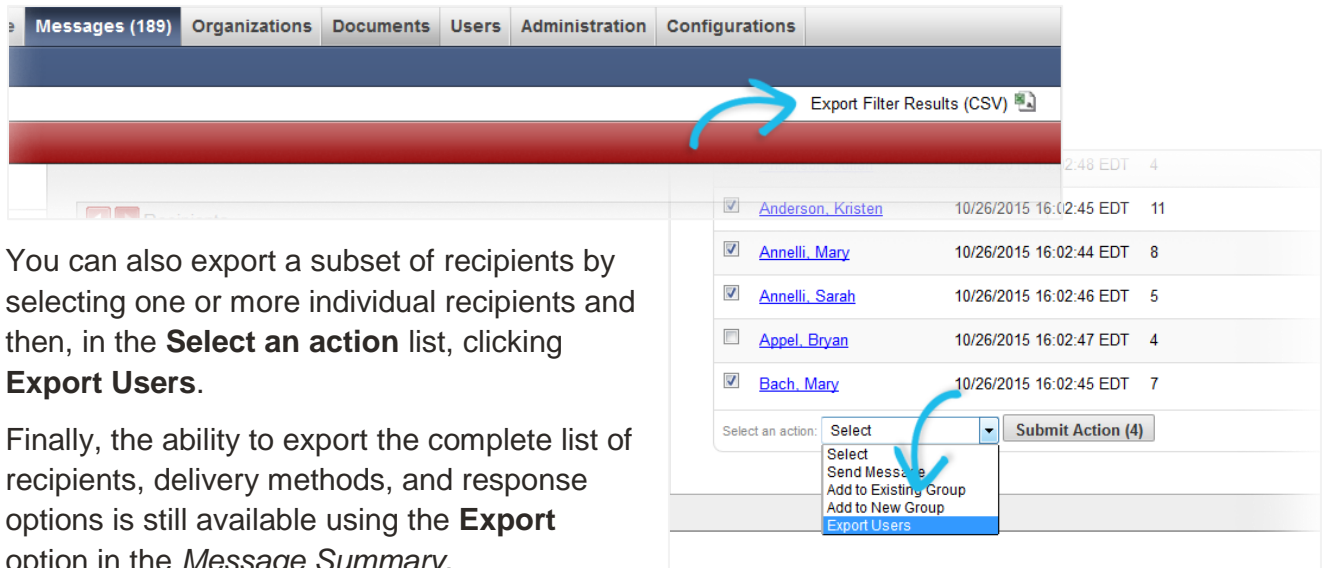
Information about external users is limited, so it may be useful to add external users to the system if you want to track their response data along with other recipient data.

9 rows displayed

<input type="checkbox"/>	Recipient Name	Last Attempt
<input type="checkbox"/>	Branham, Sue	10/07/2015 14:24:23 EDT
<input type="checkbox"/>	Clark, Nathan	10/07/2015 14:24:23 EDT
<input type="checkbox"/>	External User	10/07/2015 14:24:23 EDT
<input type="checkbox"/>	External User	10/07/2015 14:24:23 EDT
<input type="checkbox"/>	External User	10/07/2015 14:24:23 EDT

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.



The screenshot shows a navigation bar with tabs for Messages (189), Organizations, Documents, Users, Administration, and Configurations. Below the navigation bar, there is a red bar with the button 'Export Filter Results (CSV)'. A blue arrow points to this button. Below the red bar, there is a list of recipients with checkboxes and a 'Select an action' dropdown menu. The dropdown menu is open, showing options: Select, Send Message, Add to Existing Group, Add to New Group, and Export Users. A blue arrow points to the 'Export Users' option. The list of recipients includes:

<input type="checkbox"/>	Recipient Name	Last Attempt	Count
<input checked="" type="checkbox"/>	Anderson, Kristen	10/26/2015 16:02:45 EDT	11
<input checked="" type="checkbox"/>	Anelli, Mary	10/26/2015 16:02:44 EDT	8
<input checked="" type="checkbox"/>	Anelli, Sarah	10/26/2015 16:02:46 EDT	5
<input type="checkbox"/>	Appel, Bryan	10/26/2015 16:02:47 EDT	4
<input checked="" type="checkbox"/>	Bach, Mary	10/26/2015 16:02:45 EDT	7

Below the list, there is a 'Select an action:' dropdown menu with a 'Submit Action (4)' button.

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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