# Direct Messaging

## Administrator User Guide – Reports

Direct Administrators can create reports for their organizations. These reports tell Administrators what messages have been sent or received, and about the actions of users that are part of their organization.

To begin creating a report, click the Reports tab. Then, select one of the first three options in the dropdown menu.
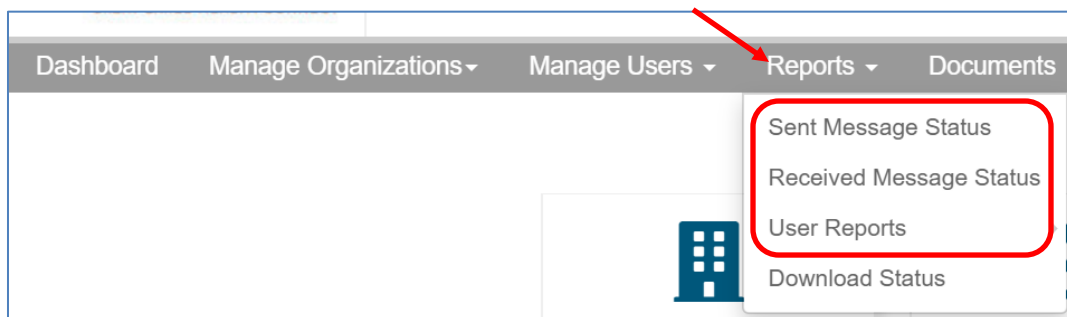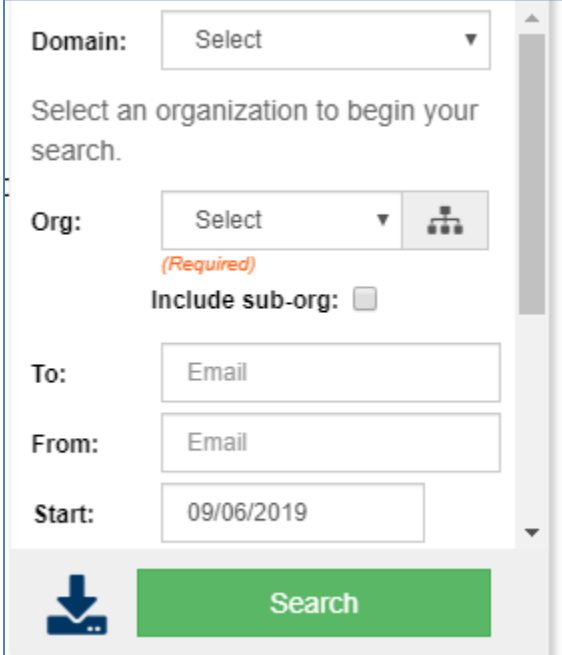


Alternatively, navigate to Sent Messages and Received Messages Reports from the Dashboard page. Click the green "Manage" button below the respective report.
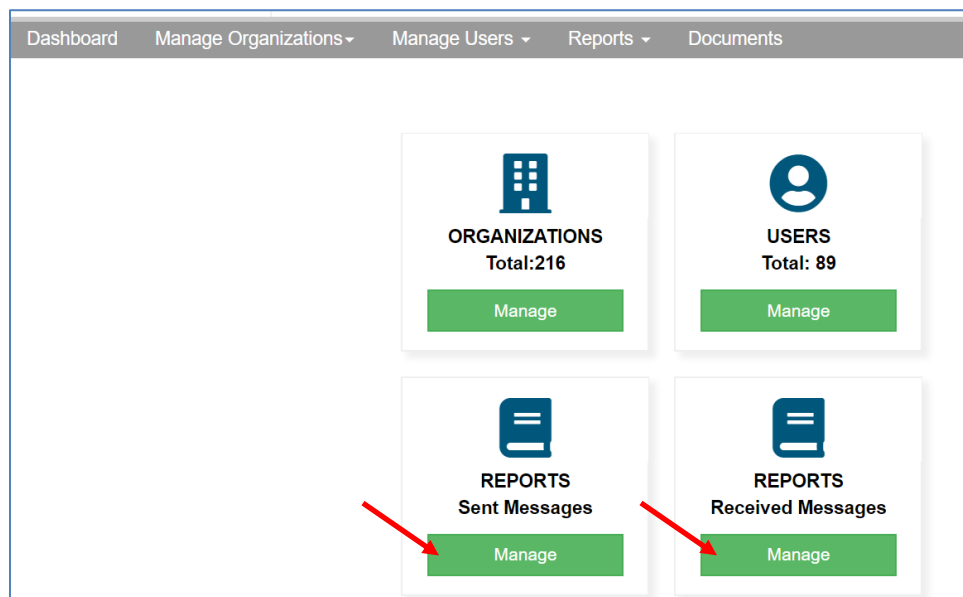
## Report Filters

Create the report using the filters. The available filters depend on the type of report. The filters available on EVERY report are explained below. The filters unique to reports will be identified later in this guide.

- **Domain**: Required - Select the Direct address domain from the dropdown menu
- **Org**: Required - Select the name of the organization from the dropdown menu. Based on your security, you may have more than one organization listed
- **Include sub-org**: Optional - If your organization has other child organizations, check the box to include all organizations
- **To** and/or **From**: Optional - report on a specific Direct address by adding it to the "To" or "From" fields
- **Start Date**: this field is required
- **End Date**: this field is required

Click **Search** to view the report.

To close the filter box, click on the "x" in the dark blue bar.

## Report Actions

These actions are available for every report.

**Search**: Search your report by selecting the search icon displayed below, complete the desired information and select the Green Search button. Icon also expands and collapses the search box.

**Refresh**: Refreshes the displayed information in the report.

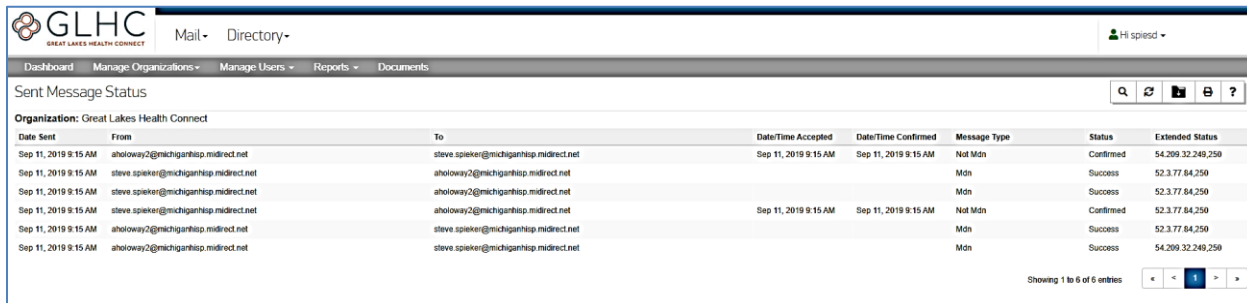**Bulk (Advanced) Download**: Opens the Advance Download search option.

**Print**: Prints the information within the displayed report.

**Message Status Guide:** Provides education regarding the Sent Message Status report.

**Questions or issues with Direct, contact GLHC at (844) 454-2443 or support@gl-hc.org.**
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# Sent Message Status Report

The Sent Messages Status Report displays the status of sent messages, whether they were successfully sent or failed and provides additional information about the successful delivery or reasons for failure. The Sent Messages Email Report displays messages based on the From Direct Address. The report will only display messages for Organizations that you are an Administrator.



The following are additional available filters when creating this report:

1. **MDN**: Optional - Include or exclude the MDN in the report by selecting "Yes" or "No" in the dropdown.
2. **Status**: Optional - Allows the User to include all statuses in the report or narrow the report to only include an Accepted, Confirmed or Failed status.

# Received Message Status Report

The Received Messages Email Report displays the status of received messages based on the "To" Direct Address. The report will only display messages for Organizations that you are an Administrator of.



The following are additional available filters when creating this report:

1. **MDN**: Optional - Include or exclude the MDN in the report by selecting "Yes" or "No" in the dropdown.
2. **Status**: Optional - Allows the User to include all statuses in the report or narrow the report to only include an Accepted, Confirmed or Failed status.

# Report Column Headers

These are the column headers for Sent Message Status and Received Message Status Reports.

- **Organization Name**: The name of the organization
- **Date Sent**: The date and time when message was sent
- **Sent From**: The sending Direct email address
- **Sent To**: The destination Direct email address, the same message could have been sent to multiple TO/CC addresses, but since the status could be different for each destination address, each TO address has separate line in the message status report
- **Date/Time Accepted**: Direct protocol classifies message delivery through the use of MDNs - Message Disposition Notifications (MDN). One such MDN, MDN:Processed, must be sent by the receiving HISP once the message is received, validated and accepted for delivery to the recipient. Once GLHC receives this MDN, the date/time when it was received is logged as the date/time accepted.
- **Date/Time Confirmed**: Another type of MDN, MDN:Dispatched, is sent by the receiving HISP when the message has been delivered to the end destination. When GLHC receives the MDN:Dispatched, it is logged as date/time confirmed.
- **Message Type**:
  - **MDN**: Indicates if the record is an MDN. GLHC is responsible for the sending of MDNs and records displayed as MDNs were not sent from a user or application
  - **Not MDN**: Indicates that a message was sent by a user or system.
- **Status**: Accepted, Confirmed or Failed
- **Extended Status**: If the message was successfully delivered to the destination email server, extended status will contain IP address of the server and return code (success is indicated by the SMTP code 250)
- **Message ID**: Unique ID assigned to the message by the sender - ID is required by email standards and by Direct protocol, it can be useful if further troubleshooting is required, otherwise it can be ignored - Message ID is only displayed in the downloadable report
- **Size (bytes):** The total size of the encrypted message sent - Size is only displayed in the downloadable report

# User Reports

There are five types of User Reports:

1. User Activity
2. Message Forwarding
3. Delete Activity
4. Mailbox Sizes
5. User Status
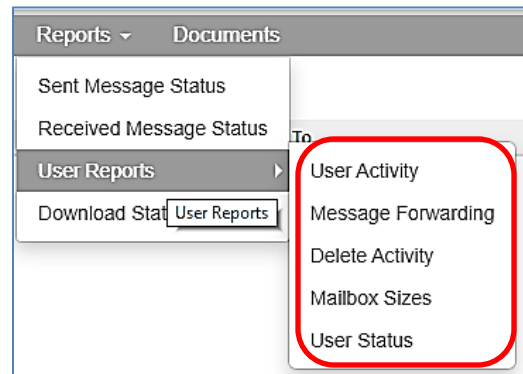
## Standard Filters

The following are standard fields that will display for any User report:

- **Username**: User's login ID
- **Account Name**: The name of the user
- **Direct Email**: If applicable. Direct Mail associated with User account. Users can have multiple Direct emails
- **Organization**: The Organization the user belongs to

## 1. User Activity Report

The User Activity Report displays the activity of your users within your organization. There are four *additional* filters.

1. **Filter by**: Optional - Filter by Registered Users, Last Login, Last Updated.
2. **Name**:  Optional - Filter by:  Username, First Name, Last Name, Create By or Last Modified By
3. **Enter Name**: Optional - Enter the Username, First Name or Last Name.
4. **Email**: Enter the User's Direct Email address if applicable.

Once all filter are selected, click **Filter** to view the report.

**Organization:** Great Lakes Health Connect

| Username | Account Name | Direct Email | Last Login | Last Modified | Modified By | Created |
|----------|--------------|--------------|------------|---------------|-------------|---------|
|  |  |  | Aug 29, 2019 12:00 PM | Aug 29, 2019 11:59 AM |  | Aug 29, 2019 11:52 AM |
|  |  |  | Sep 9, 2019 9:52 AM | Aug 29, 2019 1:59 PM |  | Aug 29, 2019 1:55 PM |
|  |  |  | Sep 10, 2019 5:03 PM | Sep 10, 2019 10:42 AM |  | Aug 29, 2019 1:56 PM |

## Column Headers

The following are the columns of the report:

- **Last Login**: Date the user last logged into the web portal.
- **Last Modified**: Date the user's record was last updated.
- **Modified By**: The last user to modify the user's record.
- **Created**: Date the user was created.
- **Created By**: The Administrator who created the user.

## 2. Message Forwarding Report

The Message Forwarding Report displays the messages that were forwarded by your users. There are four *additional* filters.

1. **Name**:  Optional. Can filter by:  Username, First Name, Last Name, Create By or Last Modified By
2. **Enter Name**: Optional.  Enter the Username, First Name or Last Name.
3. **Email**:  Optional.  Search by the Direct Email or the Forwarding Email.
4. **Enter Email**:  Optional. Type in the User's Direct Email address if applicable.

Once all criteria are selected, click **Filter** to view the report.



### Column Headers

The following are the columns of the report:

- **Forwarding Email Address**: The Direct email address that messages are forwarded to.
- **Forwarding Start Date**: The date that Direct emails were scheduled to be forwarded.
- **Forwarding End Date**: The date that Direct email forwarding ends. If there is no end date, email forwarding is set to permanent.
- **Status**: There are 2 status options:
  - **Pending**: Message has been sent out successfully and the system is waiting to receive MDN:processed.
  - **Active**: Message is confirmed with the MDN:processed and Message Forwarding is activated.

## 3. Mailbox Size Report

The Mailbox Sizes Report displays the mailbox sizes of your users. The following are available filters when creating a Mailbox Size Report.

1. **Name**:  Optional. Can filter by:  Username, First Name, Last Name, Create By or Last Modified By
2. **Enter Name**: Optional.  Enter the Username, First Name or Last Name.
3. **Size (MB)**:  Optional.  Enter the minimum or maximum size.

**O**nce all criteria are selected, click **Filter** to view the report.

| Mailbox Size Report | | | | | Reports: |
|---|---|---|---|---|---|
| **Organization:** Great Lakes Health Connect | | | | | |
| **Username** | **Account Name** | **Direct Email** | **Mailbox Size (MB)** | **Created** | **Created By** |
| | | | . 0.7730 | Aug 20, 2019 6:22 PM | |
| | | | 0.0140 | Aug 20, 2019 6:31 PM | |
| | | | . 0.0000 | Aug 29, 2019 4:22 PM | |

## Column Headers

The following are the columns of the report:

- **Mailbox Size (MB)**: The current size of the mailbox based on messaged and attachments.
- **Created**: The date that Direct User account was created.
- **Created By**: The Direct Admin's user name who created the user account.

# 4. Deleted User Report

The Delete Activity Report displays the deletion activity of your users. There are two *additional* filters.

1. **Name**: Optional - Can filter by Username or Deleted By
2. **Enter Name**: Optional - Enter the Username, First Name, or Last Name

Once all criteria are selected, click on **Filter** to view the report.

| Deleted User Report | | Reports: | Select Type ▾ | ▼ | ⟳ |
|---|---|---|---|---|---|
| **Organization:** | | | | | |
| **Username** | **Domain** | **Reason** | **Deleted** | **Deleted By** | |
| | michiganhisp.midirect.net | Confirm | Sep 11, 2019 9:04 AM | | |

## Report Status Fields

The following are the columns of the report:

- **Domain**: The Direct domain the user is associated with
- **Reason:** Reason the user's account was deleted
- **Deleted**: The date that Direct User account was deleted
- **Deleted By**: The user name who made the deletion

# 5. User Status Report

The User Status Report displays the activity of your users. There are four *additional* filters.

1. **City**: Optional - Enter the city of users are located in multiple locations
2. **State**: Optional - Select the State from the dropdown list
3. **Email**: Optional - Filter by specific Direct or Contact Email
4. **Enter Email**: Optional - Free text to enter the Direct or Contact email

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Once all criteria are selected, click on **Filter** to view the report.



### Report Status Fields

The following are the columns of the report:

- **City**: The City associated with the User's account
- **State**: The State associated with the User's account
- **Zip**: The zip code associated with the User's account
- **Role**: The role will state that the user is a Member of the account
- **Status**: The status will identify whether the Account is Pending or Active
- **Last Modified**: Date the user's record was last updated

# Downloading any Report

After selecting to download a report the Admin is given the ability to name the file that will be download. Type in a name for the report in the free text box and then click "Queue Download".

The report may take several minutes or hours to download depending on the number of reports and timeframe of the report.

After selecting to Queue the download the report will be available under **Reports** by selecting **Download Status**.
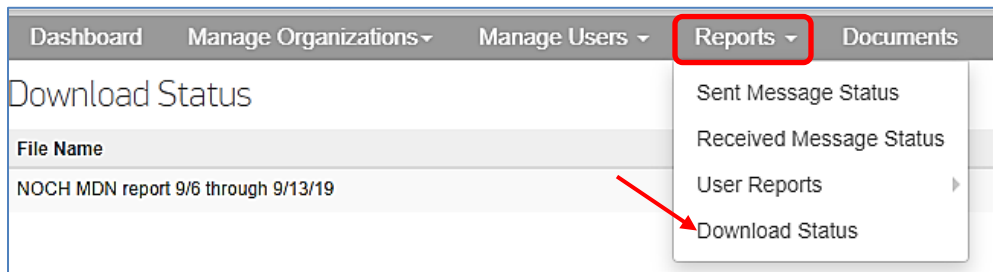


Once the report is available, the status will display "Ready". Choose to "Delete" or "Download" the report.
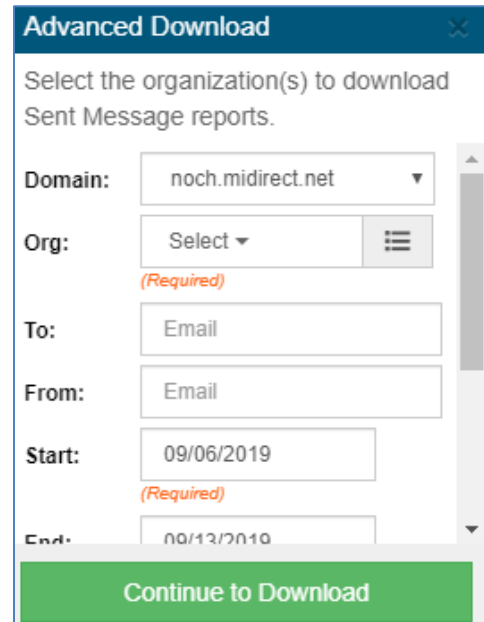


Depending on the web browser, the downloaded report will display on the screen. For Chrome, the report will display in the lower left-hand corner. Click on the Excel icon to open the report. Note: It will also display a partial name of the report.
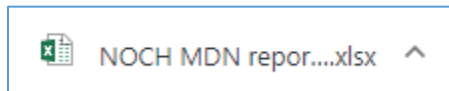
# Advanced Download

Advanced download is designed for large Organizations. This feature allows an administrator to select which sub-organizations they would include in a report.

1. Select the Bulk/Advance Download Icon
2. Select the Domain from the dropdown menu
3. Org: Optional - Allows the User to select all sub-organizations or selected orgs if desired. To do so, click on the Org "Select" dropdown.
   a. Select the organizations you wish to include in the report by click on the boxes to the right of the organization's name and then select "Choose Selected". Selecting the parent organization in the list will automatically select all child organizations.

**Advanced Download**

Select the organization(s) to download
Sent Message reports.

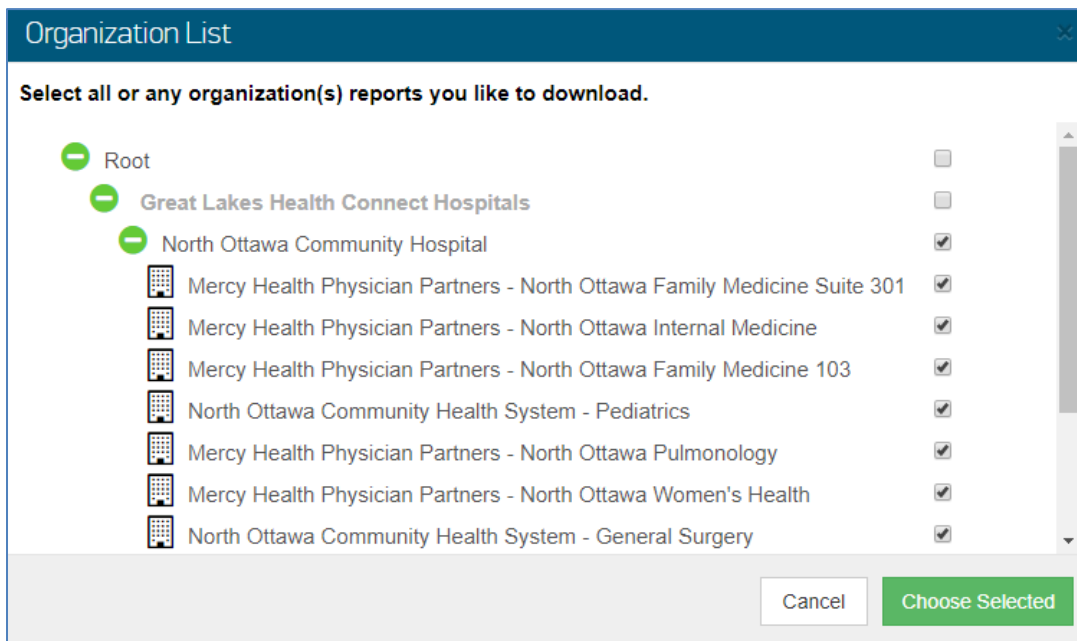| | |
|---|---|
| Domain: | noch.midirect.net ▼ |
| Org: | Select ▼  ☰ |
| | *(Required)* |
| To: | Email |
| From: | Email |
| Start: | 09/06/2019 |
| | *(Required)* |
| End: | 09/13/2019 |

**Continue to Download**

**Organization List**

Select all or any organization(s) reports you like to download.

- ⊖ Root ☐
  - ⊖ Great Lakes Health Connect Hospitals ☐
    - ⊖ North Ottawa Community Hospital ☑
      - 🏢 Mercy Health Physician Partners - North Ottawa Family Medicine Suite 301 ☑
      - 🏢 Mercy Health Physician Partners - North Ottawa Internal Medicine ☑
      - 🏢 Mercy Health Physician Partners - North Ottawa Family Medicine 103 ☑
      - 🏢 North Ottawa Community Health System - Pediatrics ☑
      - 🏢 Mercy Health Physician Partners - North Ottawa Pulmonology ☑
      - 🏢 Mercy Health Physician Partners - North Ottawa Women's Health ☑
      - 🏢 North Ottawa Community Health System - General Surgery ☑

Cancel  **Choose Selected**

b. The following will display allowing you to confirm your selection and/or remove any organization inadvertently selected. Once confirmed, select "Save".



4. **From**: Optional - You can report on a specific Direct address by adding it to the "To" or "From" fields.
5. **Start Date**: Required
6. **End Date**: Required
7. **MDN**: Optional - Include or exclude the MDN in the report by selecting "Yes" or "No" in the dropdown
8. **Status**: Optional - Allows the User to include all statuses in the report or narrow the report to only include an Accepted, Confirmed or Failed status.
9. Once all criteria are selected, click **Continue to Download**.