Advanced Sorting and Filtering

This session will cover Advanced Sorting and Filtering options for the McKesson Assessment Tools system.

The sorting and filtering options available for the reports allow you to view and present assessment results in different ways to suit your needs. This training session will demonstrate several of these options.
This is an advanced session that builds on information covered in the following modules: Introduction to Databases, Accessing Report Center, Respondent Summary Report, Respondent Complete Analysis Report, Question Basic Analysis Report, and Printing and Saving Reports. If necessary, you can stop here and view any of the aforementioned training sessions before continuing. Additionally, you may wish to print out the Report Center pages from the User Guide so that you can refer to them as needed.
To begin with let’s define the terms Sorting and Filtering: Sorting is a method of determining in what order information is presented on a report, or how information will be grouped together. Many reports have a Sort Order option that allows you to view your report results sorted by Name, by Completion Date, or by Score, for example. Filtering is a method of defining and limiting the records you will see on a report using information collected when respondents take a test. You will define what to INCLUDE or EXCLUDE from a report.
McKesson Assessments have a standard set of fields that can all be used to filter data that appears on any report. Additionally, if you have licensed the customizing option, you can create your own custom respondent fields allowing you to filter data in even more ways. When working with reports, look closely at the various Sorting and Filtering options available so that you can format and structure the output in the manner you desire.

This training module will show how you can use some of these sorting and filtering options to make your reports work better for you.
All of the reports can be found in the Report Center, where they are organized into meaningful categories that identify the kind of information they contain. For example, the Respondent Reports category contains reports relating directly to the respondents that have completed the assessment. Some reports, like the Respondent Score Basic Analysis Report, provide information about the respondents as a whole, while others, such as the Respondent Complete Analysis Report, provide detailed information about the answers and scores for each respondent individually.
There is also a category for Question Group Reports . . .

. . . as well as one for Question Reports; all of the reports contained in these categories are organized around the test questions themselves, rather than the respondents.
The key point is that when considering how you will use the sorting and filtering options for any report, first determine the category of report you need to work with. Ask yourself if you need a report that focuses on a respondent or group of respondents, or a report that focuses on a question or group of questions. Remember, that if you are unsure about what a particular report will show, simply click the green plus icon to the left of the report to see a more detailed description or run a simple version of it.
To start, select the magnifying glass icon next to the Respondent Summary Report.
Begin by setting the starting report date to January 1, 2000 to ensure that all results are included, as explained in previous sessions. In addition, leave the Sort Order option set to By Name, since this is the only option in this field for this particular report.
This brings you to the Assessment Filter option, which allows you to run a report that will display results for many assessments within a single report. The Assessment Filter is only available for a few select reports, so you will not see this on every report you encounter.
The Assessment Filter provides you with several selectors. This filter is different from other report settings because it allows you to define several settings at once, as opposed to drop-down type options, such as the Sort Order above, which can only be set to one selection at a time. With the Assessment Filter, you are setting several selectors to create what is referred to as a single "Filter Statement".
The first item you see is called Group. The Group selector keeps the filtering options together allowing you to use some very advanced techniques that will not be covered in this particular session. For now, the key point to remember is that you should leave the Group drop-down selector set to its default selection of the number 1.
And/Or Selector

The next selector is a set of two radio buttons separated by a backslash character, as indicated here. These radio buttons are labeled with And and Or, and help to define one or more filters by telling the system how they are related. For example, you may want to see all assessments that begin with 2010IRR. At the same time, you may also want to see all assessments with a passing score of 80% and higher. You would, therefore, select the "And" radio button in order to produce a report of assessments where both conditions were true, that is, where the Assessment ID begins with 2010IRR and the passing score is 80% or higher. Alternatively, you may want to use the "Or" selector here, choosing to see all assessments with ID's that begin with 2010IRR OR all assessments with a passing score of 80% and higher. In this case, only one of the two conditions must be met in order for the assessment to appear on the resulting report.
The next selector is called Field. This selector allows you to determine which field you will apply your filter to, selecting from fields such as: Assessment ID, Assessment Name, Start Date, End Date and Passing Score, just to name a few. This is probably the most important of the Assessment Filter selectors you will be using.
The next selector you see is labeled "Oper," which is short for Operator, a term used in mathematics. The Operator selector helps the system determine whether a Field is to be equal-to, greater-than, less-than or like a particular value when the report records are filtered and works hand-in-hand with the Value field, which comes after it. . .
. . . because when you are filtering Assessments or Results, you have to know what values you are filtering for.
Lastly, you see the Add button located to the far right side of the filter statement. Until you click the Add button, the statement created does not become effective nor does it filter records for your report, so it is a very important step to remember when using the advanced sorting and filtering options.
Below the Assessment Filter is the Respondent Filter. The Respondent filter provides several selectors, similar to the Assessment Filter selectors just described, that tell the system which Respondent records should appear on the report. Like the Assessment Filter, the Respondent Filter allows you to define several related filter statements.
The first item you see in the Respondent Filter is called Group. As with the Assessment Filter, the Group selector keeps the filtering options together and should be left on the default setting of 1. Next you see the And / Or selector, which helps when you need a report to meet several conditions, and the Field selector, which allows you to determine the field you will be applying the filter to. These are followed by the Operator selector, followed by the Value field, and, once again, these selectors work together.
To illustrate this, imagine you want to see all the respondents that achieved a score equal to eighty percent. You would set the operator selector to the equal symbol, as shown here, and enter the number 8-0 in the Value field. It's important to point out that what you enter in the value field is exactly what the system will search for when filtering results, so if you wish to see scores equal to 80 percent, you must enter the numerals 8 and 0, not the word "eighty." If you enter the word "eighty," the system will not match any records because the score is stored as a number in the database, not as a word. Alternatively, you could choose to see all of the scores that are less than eighty percent, in which case you would set the Operator selector to the less-than symbol, and once again enter the numbers 8 and 0 in the Value field.
Finally, to make this filter statement active, select the Add button, just as was done with the Assessment Filter.
Now that you have a basic overview of the Assessment and Respondent Filter selectors, let's create a report that shows all assessments that have an Assessment ID beginning with 2010IRR and on which all respondents scored less than 80%. To do this, you will need one Assessment Filter statement, and one Respondent Filter statement.

Begin by selecting the magnifying glass icon next to the Respondent Summary Report on the Report Center screen.
You are presented with several report options, as covered in previous sessions. Leave the Report Format and Sort Order at their default settings, and set the Report Date Range to 1/1/2000 through 12/31/2010 so that all results are considered for this report.

This brings you to the Assessment Filter. For this example the Assessment Filter will be used to see all assessments that begin with the Assessment ID "2010IRR".
Creating the Assessment Filter

Start by leaving the Group setting to its default of the number one, as discussed earlier, and the And / Or selector also set to its default of And, as this setting only has meaning when two or more statements for the same filter are defined.

Since you want the system to filter by Assessment ID, you need to select Assessment ID from the Field drop-down list, and since you want to see all of the assessments with an ID that starts with 2010IRR you will set the Operator to "Like."
The Like operator allows you to match records by searching for the information you enter in the Value field either exactly as is, or within a broader context. By choosing the Like operator here, you are saying that any Assessment ID that contains 2010IRR should be included in this report, even if 2010IRR is only part of a longer ID.

Lastly, you need to enter the Value that you will be matching to the Like operator. Once again, this means you need to enter 2010IRR to include all of the McKesson InterQual Interrater Reliability Online Assessments. To do this, enter 2010IRR into the Value field text box and press the Tab key.

Now that the filter statement is defined, you need to take one last action to make it valid and that is to click the Add button. Until you click the Add button, the Assessment Filter does not affect the report in any way.
Once the Add button is clicked, you can see the Assessment filter statement below with the selectors that have been chosen. You can also see a button identified with the label "Rem". This is the Remove button and allows you to remove the filter statement if you later decide to do so.
To summarize what was just done, an Assessment Filter was created that tells the system you want a Respondent Summary report that includes all assessments that contain the text "2010IRR" in their Assessment ID field. This report can be further refined by constructing a Respondent Filter statement.
Creating the Respondent Filter

The Respondent Filter is where you can add filter statements that tell the system which respondents, on each of the assessments listed, will appear on the report. Once again begin by leaving the Group setting to the number 1, and the And / Or selector set to its default of And.
Looking at the Field selector drop-down, you can see a number of field choices. Some of these are system generated, while others are fields of information respondents fill-in when taking the assessment, such as the City, State and Region, for example.

Since you want to only include people that have scored less-than 80% on the assessment, choose Final Score from the list shown. The Final Score includes the raw score the respondents achieved on the assessment, as well as any adjustments that may have been made to the scores afterward.
For the Operator selector, choose Less Than from the drop-down list shown since you want to see scores that are less than 80%. And finally, you need to enter the Value that you want items to be less than when the report is displayed, so enter the number 80 in the value text box, followed by the Tab key to continue.

It's important to note here that you do not need to enter the percent symbol. Whatever is entered in the Value text box will be the exact value that the system will match for display on the report.

Now that the Respondent Filter statement is defined, click the Add button, as was done previously with the Assessment Filter statement.
You now see that the Respondent Filter Statement appears and shows an "Rem" button next to it. Recall that the "Rem" button is an abbreviation of remove and by clicking it, you can remove the filter statement, if desired.

To summarize, the Respondent Filter statement just created will show all respondents that scored less-than 80% on any of the assessments shown, which, in this case, are all assessments with an ID beginning with 2010IRR. You could take this further by adding another filter statement, if desired. In fact, you can add as many Assessment or Respondent filters statements as you wish to any report. There are no limitations.

You are now ready to click the Run button and view the report.
Once again remember, when you click the Run button to run a report it opens the report in a new browser window. Some organizations and some browsers use Pop-Up Blockers which may prevent the report window from opening and make it appear as if the report will not operate properly or will not display on-screen. A simple method to overcome this is to make sure that you hold the Control key down on your keyboard when you click the Run button. This will temporarily disable the Pop-Up Blocker and allow the report to properly display on-screen.
Once the report appears, you can see the expected assessments and respondents are displayed. In this case, there are only two assessments that contain respondents meeting the filter criteria, and all respondents listed across those two assessments have scored less than 80%. If you were to run this report again in the future, you might see additional assessments listed showing respondents who have scored below 80%.
This session covered the various Assessment and Respondent Filter selectors available when using advanced report sorting and filtering techniques. The filtering options available provide a lot of control, giving you quick and easy access to the information that is most important to you. The key to learning how to use Assessment and Respondent Filters effectively is to play with them. Try different settings and see if they produce the desired results. There is nothing destructive that takes place in the reports and you can run the reports over and over again until you produce ones that show only the results you seek.
For more information consult the Help documentation provided.
If you need further assistance, contact McKesson Health Solutions at 1-800-274-8374 or by e-mailing cesupport@McKesson.com.