

## Case Managers-Pick List

**Development Version:** Crystal Reports XI, Service Pack 2

**First Issuance Date:** 1/21/2007

**Parameters:** Local Office, Name Order, Sort By.

**Key Features:** This report may be used to generate a parameter pick list of case managers. This report can be used to populate pick lists for the following reports:

**Caseload-Program Report**

**General Program Report**

**Veterans Caseload Report**

This pick list will display the user ID and the user name and will show only case managers for selected offices or for all offices statewide.

Case managers are included based on certain criteria:

- 1) The case manager has an "Active" user ID (i.e., it has not been inactivated).
- 2) The case manager has been assigned to cases in the case management program.

You can choose whether to display the case manager's name by "first last" or "last, first" using a parameter. You can also decide whether to sort the list by user ID or by name. You can still choose to order by either field after importing the list into the parent report.

Before exporting the report, you should right click on the gray area to the left of this report description and choose "Suppress". If you need to see the report description again, you can read it by clicking on the design tab. Then export the report as tab-separated text->application, open the exported file and remove quotes in WordPad using search (""") and replace (leave blank), and also remove the total count at the bottom of the list, and save it under a new name, and then import the text file in the parameter setup screen of the parent report. After importing, you will need to manually add an option for "All". Enter "All" as the value, and enter " All" (with a leading space as the description). Then click on the bar that says "Description" to order the list alphabetically. Because of the space, " All" will appear at the top. Once ordered, you can remove the space if you wish.

**Report Run Times:** A few seconds.















