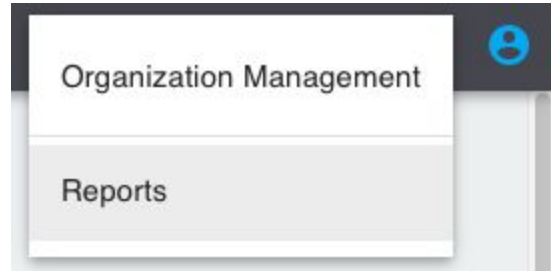**SCENARIO 8:** CREATING A CASELOAD REPORT

You want to get a snapshot of your entire agency's caseload, as well as a snapshot of your own caseload. You can accomplish both of these by printing reports. Follow the steps below to create both types of reports.

1) Click the red **"Apps"** icon in the global toolbar at the top of the home screen.

2) Select **"Reports**".

3) The **Report Menu** will display. The reports are divided into sections based on report type. Select the **"Cases"** report under the *Standard Reports* section.

4) To capture a snapshot of *all* active cases in your agency, click **"In-Progress Cases"**. To capture a snapshot of just *your* in-progress cases, click **"My Cases"**.

5) Filter the report results under the area labeled *Case Criteria*. If you want to include all cases, skip this step and don't specify any criteria. Otherwise, using the corresponding drop downs, select as many case types, case statuses, courts, and judges as you want to include or leave the area blank to include all items in that category.

Case Criteria

Case Types

ISP - Level 1, ISP - Level 2, ISP - Level 3 ▼

Case Statuses

Active Management ▼

Courts

Municipal Court ▼

Judges

Wilson, Warren H., Miller, Martin A. ▼

RUN REPORT

6) Click **"Run Report."**

7) Once the report opens, you can use the report toolbar to **zoom in, zoom out, page up, page down,** and **print.**