

Advanced Case Management Tutorial Part 2 - Advanced use of the Case List

We now have many saved case properties and one thing we can immediately do with them is to reference them in the Case List view.

Advanced Case Management Tutorial Part 2 Learning Objectives

- Distinguish between Case List and Case Details
- Add/remove properties from the Case List and Case Details
- Change Display Text of properties in the Case List and Details
- Change case properties to the appropriate format in Case List and Details

We now have many saved case properties and one thing we can immediately do with them is to reference them in the Case List view

Adding Properties to the Case List

Navigate to the Case List tab of the "Pregnancy" Menu (previously called "Case List" Menu)

The screenshot shows the 'Pregnancy' menu interface. At the top, there is a 'Pregnancy' header with a hamburger menu icon and a plus sign. Below this, there is a 'Pregnancy' sub-header with an edit icon. A text input field contains the placeholder 'Enter case list description here' with an edit icon. To the right, there are 'App Preview' and 'Publish' buttons. Below the description field, there are three tabs: 'Settings', 'Case List' (which is selected), and 'Case Detail'. Under the 'Cases' header, there is a 'Saved' button. The 'Display Properties' section contains a table with three columns: 'Property', 'Display Text', and 'Format'. The table has one row with the following values: 'name' in the Property column, 'Pregnant Women' in the Display Text column, and 'Plain' in the Format column. Below the table is a '+ Add Property' button.

Property	Display Text	Format
name	Pregnant Women	Plain

You can add to the Case List by clicking on Add Property and then starting to type the name of the property. A dropdown will provide suggestions of properties that have already been saved to the case.

Click on Add Property and then type in Imp to add it to the list of items that will show up in your Case List

Display Properties

	Property	Display Text	Format	
↓	<input type="text" value="name"/>	<input type="text" value="Pregnant Women"/>	<input type="text" value="Plain"/>	✕
↓	<input type="text" value="lmp"/>	<input type="text" value="Lmp"/>	<input type="text" value="Plain"/>	✕

You should now have two items in your Case List: name and lmp

Change Display Text

For each property we can change the Display Text- the text that the user sees. Just type directly into the box.

Change the Display Text for "Name" to "Woman's Name"

Change the Display Text for "Lmp" to "LMP Date"

Display Properties

	Property	Display Text	Format	
↓	<input type="text" value="name"/>	<input type="text" value="Woman's Name"/>	<input type="text" value="Plain"/>	✕
↓	<input type="text" value="lmp"/>	<input type="text" value="LMP Date"/>	<input type="text" value="Plain"/>	✕

Change Property Format

If you click on one of the Format drop-down menus you will see a number of different options:

Format

- ✓ Plain
- Date
- Time Since or Until Date
- Phone Number
- ID Mapping
- Late Flag
- Search Only
- Address
- Distance from current location

You can find details on each of these at [Case List and Case Detail Configuration](#). There are lots of useful designs you can introduce using the appropriate format.

Change the Format for lmp to "Date"

You now have a case list with two properties, using the most appropriate format and readable display text:

Display Properties

	Property	Display Text	Format	
↓	<input type="text" value="name"/>	<input type="text" value="Woman's Name"/>	<input type="text" value="Plain"/>	✕
↓	<input type="text" value="Imp"/>	<input type="text" value="LMP Date"/>	<input type="text" value="Date"/>	✕

Distinguishing Case List and Case Details

This may be a good time to distinguish between Case List and Case Details

Case List - this identifies the properties that are used in the list of cases. For example, if you tried out the Basic Case Management Tutorial app on a phone, you would have found that when you clicked on the Home Visit form, instead of going directly to the form you were brought to a list which showed the name of the Pregnant Woman. That is because in the Basic tutorial we only kept "name" in the Case List. However, you can put any case property in the Case List, and can even remove the name if you choose to. It is important, however, to remember that the case list shows one case per row, so on most phones there is only enough room for two properties in the case list.

Here is an example of a case list that shows two properties- "Name" and "Date of Referral"

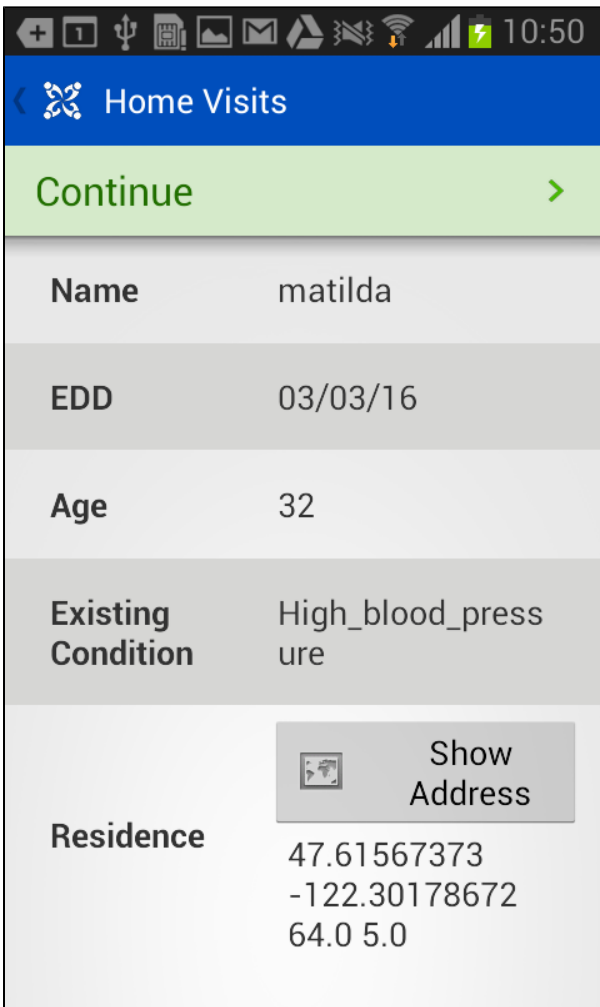


The screenshot shows a mobile application interface for a case list. At the top, there is a blue header bar with a back arrow, a search icon, and the title "Referrals". Below the header is a table with two columns: "Name" and "Date of Referral". The table contains seven rows of data:

Name	Date of Referral
Anita	10/12/15
Gina	11/12/15
Janah	04/12/15
karen	03/12/15
Maria	27/11/15
rashmi	24/11/15
Sofia Mattes	11/12/15

Case Details - this is the list of additional information that the user will see about each case. After the user selects a case from the case list, they will see case details. There is no real technical limit to how many details you can include in a case details view, but think about what will be useful for the mobile user to see before starting a session with a particular client.

Here is an example of how a case details view might appear on a smartphone:



Case List and Case Details are configured on two separate tabs in the module. So far you have been working on the case list, but we will also want to add to the case details.

Configuring Case Details

Go to the Case Detail tab

☰ Pregnancy ✎

Enter case list description here ✎

Settings

Case List

Case Detail

You will notice that "name" is already added as a property

Add two additional properties, `total_children` and `feeling_sick`, by clicking on Add Property and typing the property name.

There should now be 3 case properties in the Case Details. You may notice that we are keeping the property **name** in both case list and details - depending upon what is best for your users it may make sense to keep some properties in both places.

Update the Display Text until it looks like this:

Display Properties ?

	Property	Display Text	Format	
↓	<input type="text" value="name"/>	<input type="text" value="Woman's Name"/>	<input type="text" value="Plain"/>	✕
↓	<input type="text" value="total_children"/>	<input type="text" value="Total Children"/>	<input type="text" value="Plain"/>	✕
↓	<input type="text" value="feeling_sick"/>	<input type="text" value="Feeling Sick"/>	<input type="text" value="Plain"/>	✕
<input type="button" value="+ Add Property"/>				

NOTES:

- You can remove properties by clicking on the "X" on the right side of any row.
- You can change the order of properties by grabbing on the left side of any row and dragging it up and down.
- Don't forget to save!

Advanced Use of the Case List

Advanced Configurations of the Case List

Sorting

Sorting the case list is a very powerful tool. For example, organizing a case list alphabetically may be useful for some workers wanting to quickly find a case (though they can also search in the list).

However, you could also sort by something like a date, which may help to prioritize certain cases. For example, if you had a case property called `next_visit`, you may want to sort your case list by that property so that the cases with an upcoming `next_visit` date go to the top of the list.

You can sort by a case property by clicking on the **Add Sort Property** button in the Case List tab. You can then choose the property, or series of properties you want to sort by, and specify the direction of sorting. A property does not have to be displayed in the Case List in order for you to sort by it.

Filtering

You can also filter the case list. For example, you may have a module that only deals with very malnourished children, so you only want to see children with the correct status in the case list. The image below provides an example of how you would configure your case list to only display the names of severely malnourished children.

Display Properties

	Property	Display Text	Format	
↓	<input type="text" value="name"/>	<input type="text" value="Name"/>	<input type="text" value="Plain"/>	✕
↓	<input type="text" value="id_calc"/>	<input type="text" value="ID"/>	<input type="text" value="Plain"/>	✕
↓	<input type="text" value="child_birthdate"/>	<input type="text" value="Child Birthdate"/>	<input type="text" value="Time Since or Until Date"/>	✕
			Measuring	
			<input type="text" value="Years since date"/>	

Filtering and Sorting

Filter ?

	Sort Property ?	Direction	Display Blanks ?	Format	Display Text ?	
↓	<input type="text" value="date_last_visit"/>	<input type="text" value="Increasing (May 1st, May 2nd)"/>	<input type="text" value="Top of list"/>	<input type="text" value="Date"/>	<input type="text" value="Date Last Visit"/>	✕

Resources

Learn more about configuring sorting and filtering by visiting the [Case List and Case Detail Configuration](#) page on the Help Site.

Go to the next part

Guide to the Advanced Case Management Tutorial

1. [Saving Data to Case Properties](#)
2. [Advanced Case List Configuration](#)
3. [Case Management Window](#)
4. [Referencing Data Loaded from the Case](#)
5. [How to Create an Edit form](#)
6. [Enabling Supervisor Approval Workflows](#)