



**Lyon Software**

## **CBISA™ Reporters**

*A resource for the Administrator/Coordinator*

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## Introduction: Role of the Reporter

The main role of the reporter is to enter community benefit data into CBISA™. All records, including Programs, Occurrences, Narratives, and Outcomes, are entered into CBISA™ and tagged with a “pending” status. Since only “active” records are included on reports, pending records must be reviewed by an Administrator/Coordinator and imported. Importing a record changes the status from pending to active and allows the record to be included in community benefit reporting.

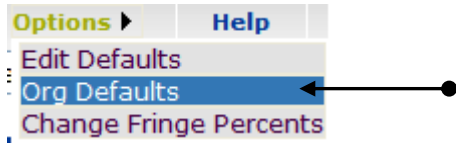
### What the Reporter CAN do

- Add new Programs (if granted permission), Narratives, and Outcomes data
- Publish a record when data entry is complete
- Copy a record while the record is still pending
- Edit/Delete pending records created by him/her
- Add Occurrences to active Programs, or to pending Programs that he/she has created
- Edit his/her own user contact information and password
- Preview/Print/Export limited reports

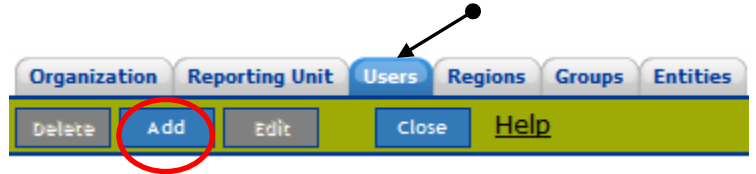
### What the Reporter can NOT do

- Edit/Delete records created by him/her that have already been imported (Active records)
- See or have access to any Occurrence, Narrative entry, or Outcome record that was not created by him/her
- Add/Edit/Delete any facility defaults, facility financial information, or Financial Service records

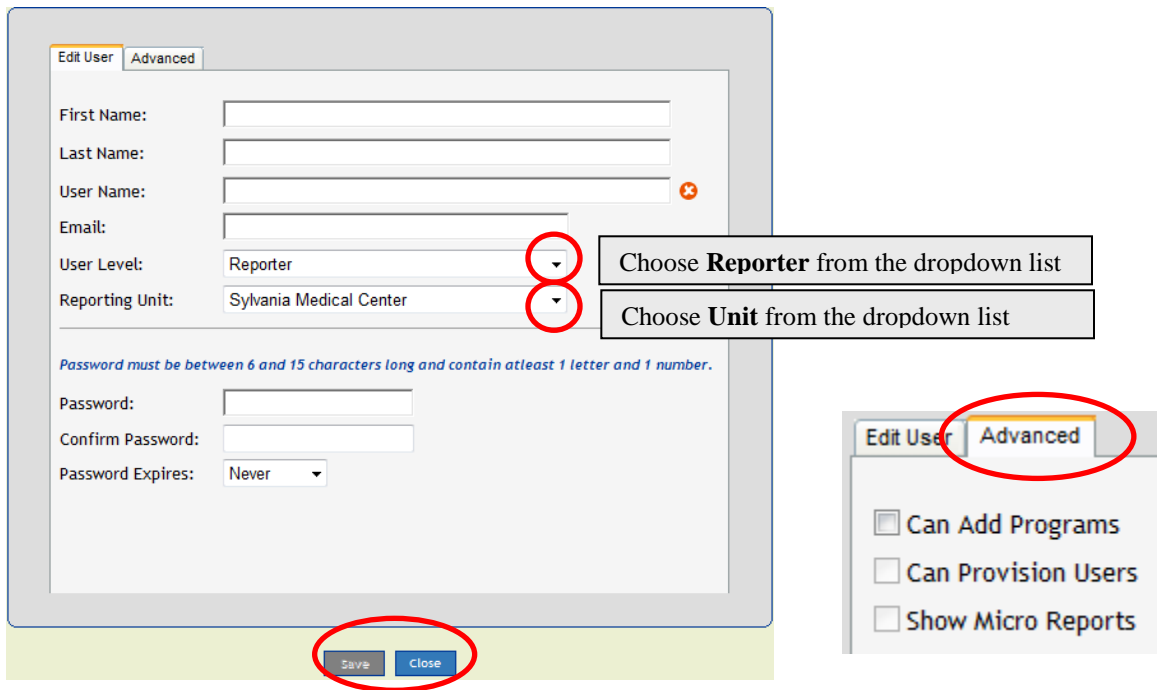
# 1. Setting up Reporter User Accounts



Click on the "Users" tab and choose "add"

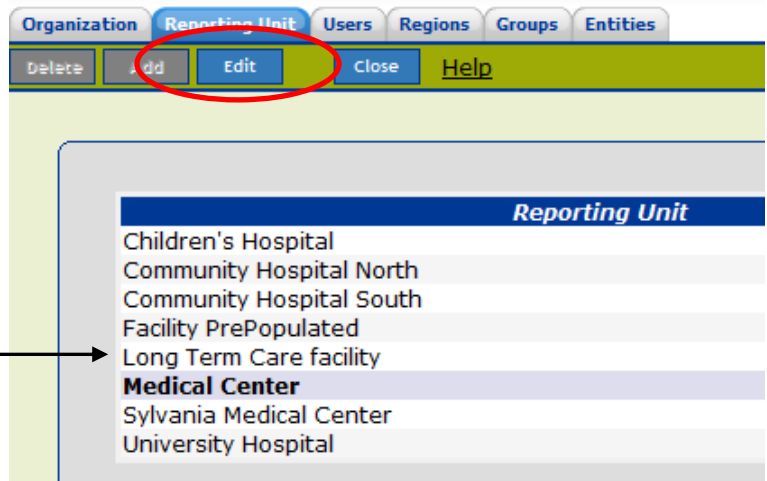
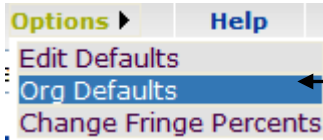


Complete the user information. Click "OK" to save your new user account.

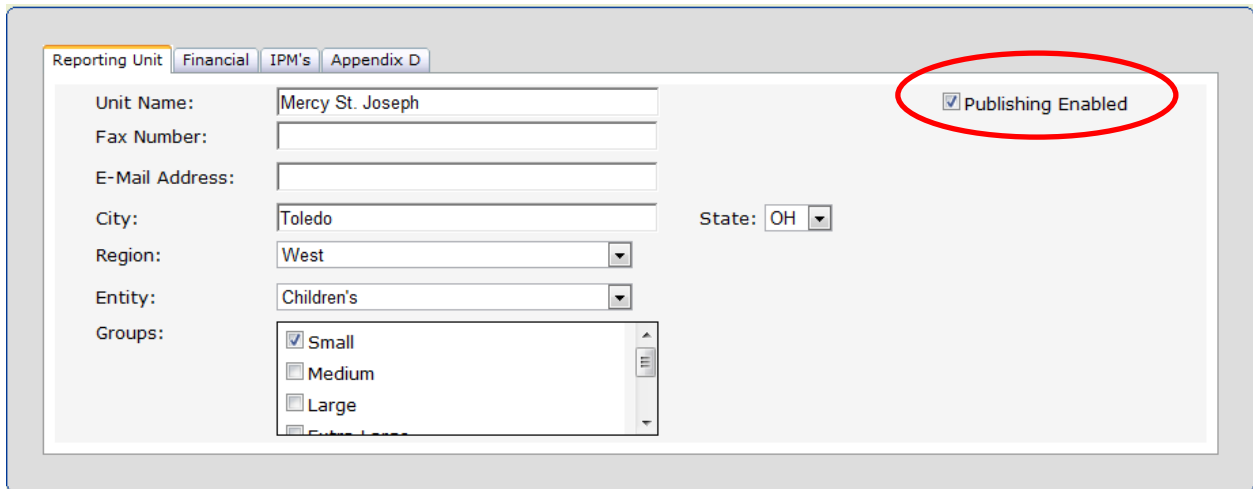


Check the "Can Add Programs" box if you would like Reporters to be able to add new programs, or leave the box unchecked if you want Reporters to use the existing Program list.

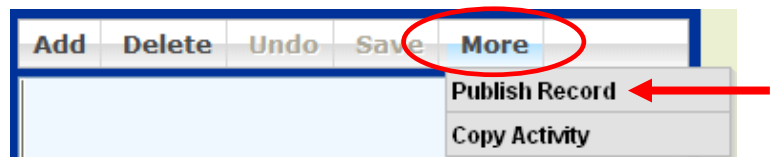
## 2. Enabling the "Publish" Functionality



Edit the Reporting Unit and verify that the "Publishing Enabled" box is checked.

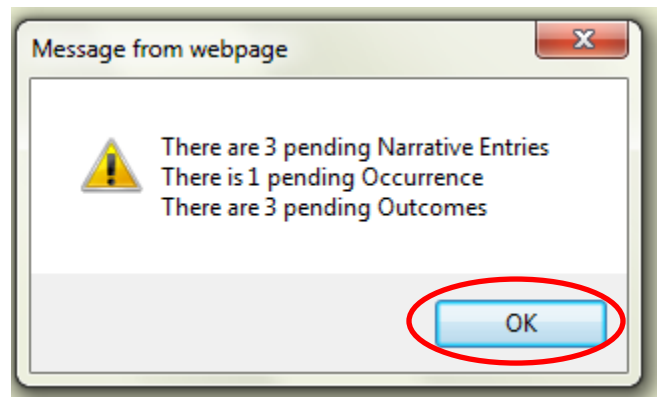
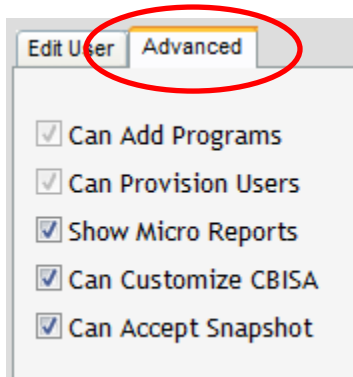
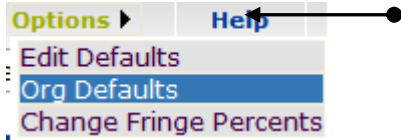


Reporters enter records, save, and then "publish" them to notify Coordinators that the record is complete and ready to be "published" to the community benefit report, i.e., ready to be imported and have the status changed from "pending" to "active".



### 3. Micro Reporting

To be notified when pending records exist, make sure that micro reporting is “turned on” for any Administrator/Coordinator that will be responsible for importing records. Edit the User record and verify that the “Show Micro Reports” box is checked.



Micro Reports notify Administrators/Coordinators that Pending Records exist whenever the user logs in to CBISA™. Simply click “Ok” to acknowledge the report, and import the records at your convenience.

## 4. Training Your Reporters on Data Entry

First, decide what data a Reporter will be responsible to enter. Available data records include: Programs (if they have been granted permission on their user account); Occurrences; Narratives; and Outcomes.

Second, train your Reporters on correctly entering data. If your Reporters will be entering Program information, provide guidance on the data fields that must be completed. **Remember**, CBISA™ only requires that the “General” screen is completed in order to have a program record. The coordinator must decide what data on the additional “optional” screens (Objectives, Indicators, Settings & Formats, Target Audience, and Healthy Communities) should be completed.

Regarding Occurrences, provide detailed instructions on completely and accurately filling out the statistical information. Make sure that you have defined line three “inputs” (Staff hours and Volunteer hours), that your reporters know how to count the “persons served”, and that they have been given guidance on entering expenses and offsetting revenues. **Remember**, Reporters will not see sensitive information like fringe benefit, hourly rates and expense and revenue totals.

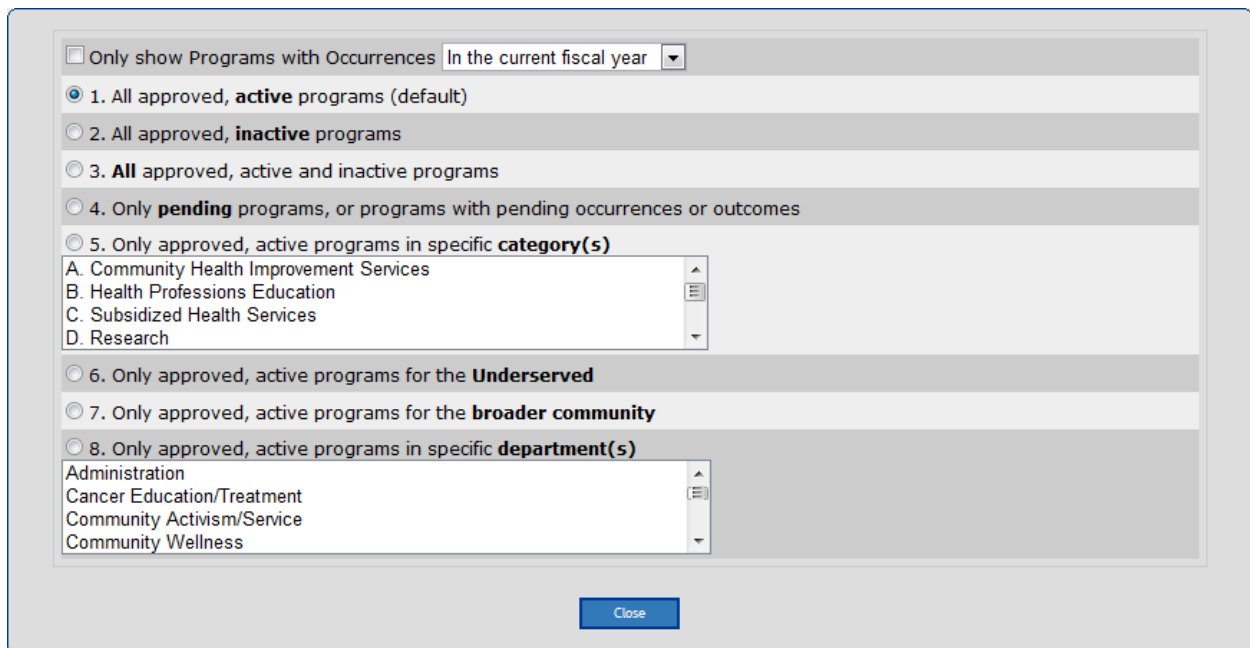
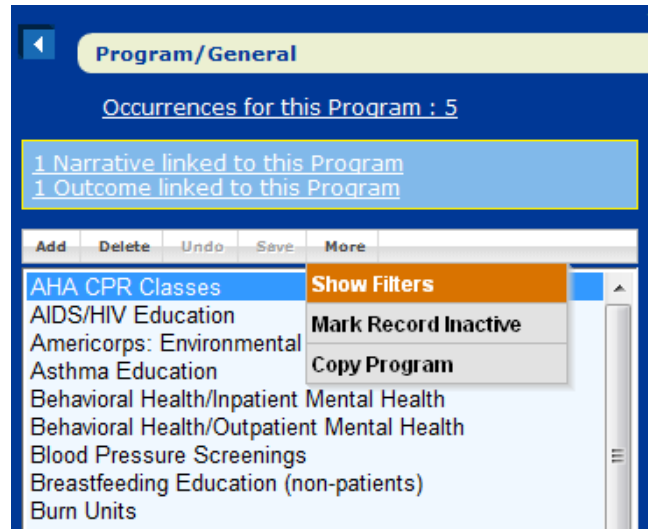
Narrative and Outcome records may be linked to Program records by Reporters. It is important that Reporters understand how to properly link records.

**Remember**, reporters may “publish” all new records after they have been saved **IF** you have turned on the publishing function.

Last, outline expectations for Reporters. Include how often data should be entered (once a month, once a week, as it happens, etc.), any reporting deadlines (monthly, quarterly), how expenses should be calculated, and what kinds of narratives should be entered. Also, provide resources and contact information so your Reporters will know who to call with questions.

## 5. Importing Pending Records

**Step 1:** Expand the "More" function button, and choose the option "Show Filters".

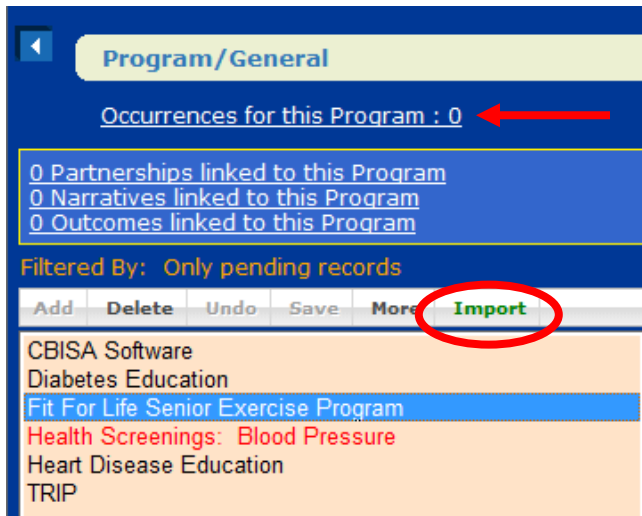
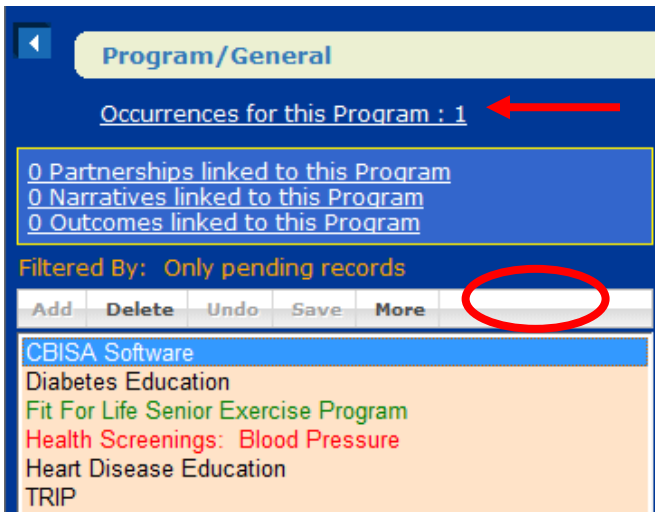


**Step 2:** In the Programs module, select filter option #4 to view pending records. (Viewing Pending records for other modules will be accessed the same; however, the filter option number may be different.)

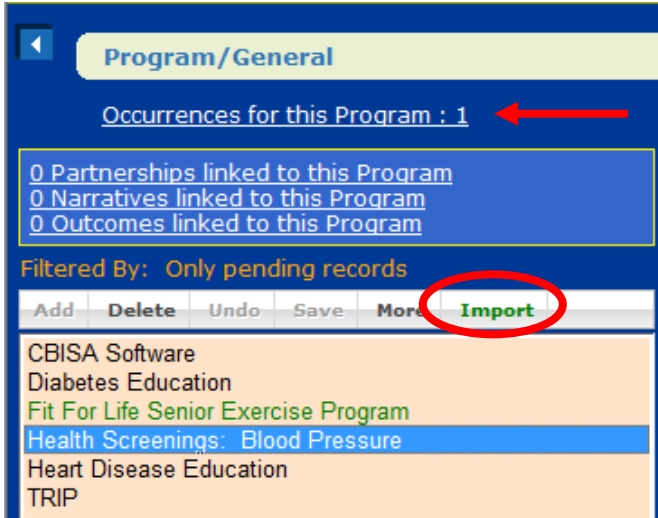
Step 3: The browse box will contain a list of:

- a. Programs that are currently active but have pending occurrences/outcomes attached
- b. Pending programs, or
- c. Pending programs with pending occurrence/outcomes records

Example a: Active Program, Pending Occurrence record



Example b: Pending Program, no Occurrence records



Example c: Pending Program with Pending Occurrence



Step 4: Review each pending data record, make any necessary edits and “Save” the changes, then click the “Import” button to change the status from “pending” to “active”.

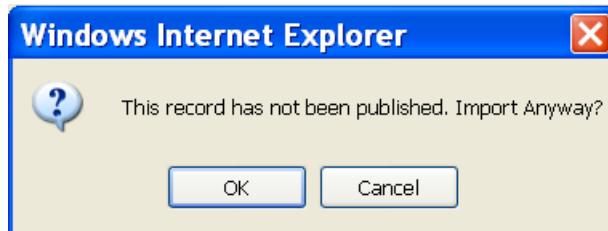
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Please note: An Occurrence record cannot be imported prior to the Program (parent) record.

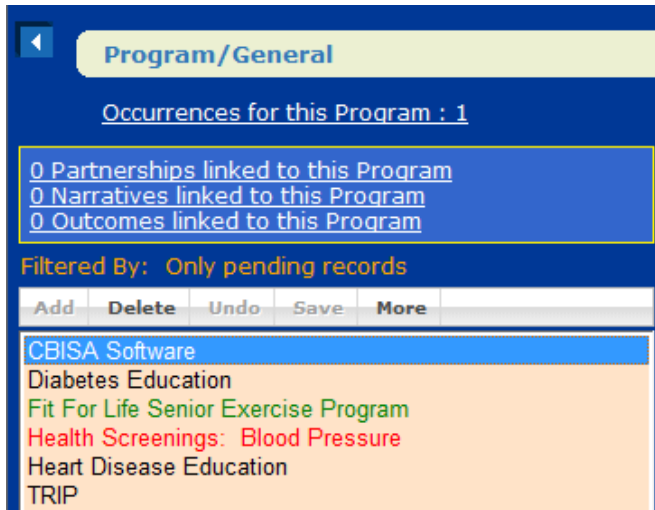
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If a reporter has not marked their record as “published”, the Administrator/Coordinator importing the record(s) will see the following warning message:



Click “Ok” to continue with the import or “Cancel” to abort.

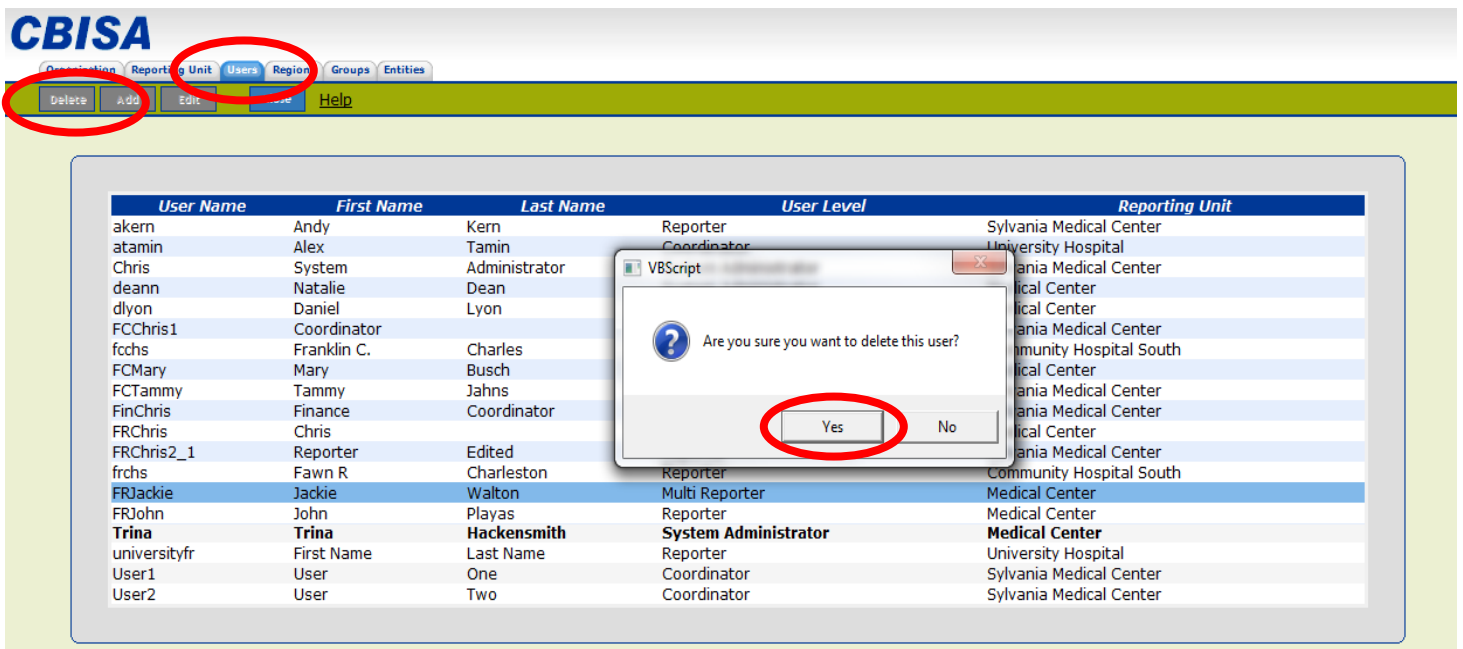


“Active” records = black font  
 “Published” records = green font  
 “Unpublished” records = red font

## 6. Deleting/Editing a Reporter User Account

What happens when a Reporter is no longer reporting community benefit? As an administrator/coordinator you have two options: delete the User Account or edit it.

Option 1: To delete a user account, select it from the user control panel (Options/Org Defaults/Users) and click on the function control button “delete”.



Any record created by the user will continue to exist in the database and the “record created by” will continue to show the original users name followed by the “tilde” symbol.

*Record Created by: FRJackie~  
Record Created on: 1/12/2012*

**Option 2:** Editing the user account of a Reporter who is no longer entering data into CBISA™ offers a unique advantage. Data records are attached to the user account, not the user name; therefore, if you edit an existing user account with new user information, the new reporter will be able to see all data the previous reporter entered. This is most helpful when a new reporter is “taking over” for the previous reporter.

However, it is important to note than when a user’s account is overwritten with a new user’s information, the account name is globally changed, even in “closed” years.

*“Delete a User Account” when it is important to preserve the user name on the data record*

*“Edit an existing User Account” when it is important for the new reporter to have access to data the previous reporter entered*

## 7. Important Facts to Remember

- Reporters do not have the ability to edit active records, so
  - ... *don’t import a record unless you are sure the reporter has completed their data entry*
  - ... *don’t ask reporters to update any of the program records that were pre-populated with your CBISA™ program*
- Reporters do not have access to the Financial Services module
- Reporters will not see any rate information, fringe benefit percent, or calculated community benefit expenses or revenues on the Occurrence screen
- Reporters cannot customize CBISA™ and access “Edit Defaults”
- Reporters see ALL Program records, but only dated records (Occurrences, Narratives, Outcomes) that they have entered.