

The Reports and Listings sub-menus have been reordered in the following manner to match the order of the data entry modules in the software:

Needs > Goals > Partnerships > Programs > Summaries > Statistics > IRS 990 Schedule H > Narratives & Outcomes > Custom > Other > Multi-Unit (if applicable)

The following Reports are new to CBISA Plus™ 7.0:

- Goals #7 – Progress Compared to Target
- Goals #8 – Progress Compared to Baseline
- Partnerships #2 – Partnerships – Comprehensive (All Linkages)
- Multi-Unit #5 – Elements of Revenue

The following report sub-menus are new or revamped: Programs (most Menu I and Menu II reports), Summaries, Statistics (formerly “Listings”), and Narratives & Outcomes. Details as follows:

Programs Sub-Menu Report List:

| <u>Report Name</u> | <u>Previous Location</u> |
|---|--|
| #1 - Programs Detail | Menu I - #1 |
| #2 - Program Detail Full | Menu I - #2 |
| #3 - Selected Categories - Program Detail | Menu I - #4 |
| #4 - Programs Targeted For... | Menu I - #6 |
| #5 - Comparative Trend | Menu I - #11 |
| #6 - Comparative Trend - Reversed | Menu I - #12 |
| #7 - Selected Formats | Menu I - #13 |
| #8 - Selected Settings | Menu I - #14 |
| #9 - Selected Ages | Menu I - #15 |
| #10 - Selected Genders | Menu I - #16 |
| #11 - Selected Vulnerable Populations | Menu I - #17 (formerly “Special Needs”) |
| #12 - Selected Counties | Menu I - #18 |
| #13 - Selected Healthy Community Goals-Concerns | Menu I - #19 |
| #14 - Selected User-Defined Codes - Programs | Menu I - #20 |
| #15 - Programs with Collaborators | Menu I - #22 |
| #16 - High Impact Programs | Menu II - #3 |
| #17 - Costly Programs | Menu II - #4 |
| #18 - Low Cost Programs | Menu II - #5 |
| #19 - Low Cost-High Impact Programs | Menu II - #6 |
| #20 - Programs Ranked By... | Menu II - #7 |
| #21 - Three Year Comparative By Program | Summaries - #5 (formerly “Executive Summary Detail – 3 Year Comparative) |
| #22 - List of Programs... | Listings - #9 |
| #23 - Program Contacts... | Listings - #12 |
| #24 - Programs Inventory | Other - #7 |

Summaries Sub-Menu Report List:

| <u>Report Name</u> | <u>Previous Location</u> |
|---|---|
| #1 - Complete Summary - Unclassified | Summaries - #1 |
| #2 - Complete Summary - Classified | Summaries - #2 |
| #3 - Executive Summary | Summaries - #3 |
| #4 - Three Year Comparative By Category | Summaries - #4 (formerly "Executive Summary – 3 Year Comparative) |
| #5 - Selected Categories - Summary | Menu I - #3 |
| #6 - Summary of Community Services | Summaries - #6 |
| #7 - Summary By Category | Summaries - #7 |
| #8 - Summary - Selected Departments | Summaries - #8 |
| #9 - Summary - Targeted | Summaries - #9 |
| #10 - Summary By Month - Net Benefit | Summaries - #10 |
| #11 – Direct and Indirect Expense by Category | Summaries - #11 |

Statistics Sub-Menu Report List:

| <u>Report Name</u> | <u>Previous Location</u> |
|---|--------------------------|
| #1 - Occurrences - Selected Programs/Categories | Listings - #1 |
| #2 - Occurrences - Selected Departments | Listings - #2 |
| #3 - Occurrences - Selected Users | Listings - #3 |
| #4 - Occurrences - Sorted by Department for Program | Listings - #5 |
| #5 - Occurrences with Notes | Listings - #6 |
| #6 - Occurrences - Selected Zip Codes | Listings - #4 |
| #7 - Occurrences - Elements Of Cost | Listings - #7 |
| #8 - Occurrences - Salary Expense Detail | Listings - #8 |
| #9 - Occurrences Due | Listings - #10 |
| #10 - Pending Occurrences | Listings - #11 |
| #11 - Occurrences - Restricted Offsetting Revenue | Listings - #13 |
| #12 - Occurrences - Indirect Cost | Listings - #14 |
| #13 - Selected Departments | Menu I - #5 |
| #14 - Selected User-Defined Codes - Occurrences | Menu I - #21 |
| #15 - Elements of Cost | Menu I - #9 |
| #16 - Elements of Offsetting Revenue | Menu I - #10 |
| #17 - Programs with Revenues... | Menu II - #1 |
| #18 - Programs with Expenses... | Menu II - #2 |
| #19 - Financial Services Detail | Menu I - #8 |

Narratives & Outcomes Sub-Menu Report List:

| <u>Report Name</u> | <u>Previous Location</u> |
|--|--------------------------|
| #1 - Selected Keywords | Narrative Reports - #1 |
| #2 - Selected Subjects | Narrative Reports - #2 |
| #3 - Selected Departments | Narrative Reports - #3 |
| #4 - Pending Entries | Narrative Reports - #4 |
| #5 - All Narratives Including Linkages | Narrative Reports - #5 |
| #6 - All Outcomes Including Linkages | Menu I - #7 |
| #7 - Outcomes - Selected Programs | Listings - #15 |