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## Welcome

Welcome to ExxonMobil Bernard Harris Summer Science Camp (BHSSC) Information Management System (IMS) Manual. The IMS is a tool that was adapted to meet the unique needs of the ExxonMobil Bernard Harris Summer Science Camps. This tool will allow you to capture important information about your camp. The system will also allow you to roll-up the data that has been entered into the system and display it in the form of a report.

This manual is not intended to replace IMS training – it is simply your handbook for navigating the system. Use it often, as it will provide you with useful information that will allow you to use the IMS to its full capacity. It will also enable you to tell a compelling story that will motivate your national and local project sponsors to continue to fund your ExxonMobil BHSSC at your site.

If you encounter technical issues while working with the IMS contact the Paragon TEC IMS Help Desk at 216.361.5555, extensions 204 or 209. The IMS Support Team is ready and able to answer your questions and guide you through any difficulties.

IMS Support  
Paragon TEC, Inc.

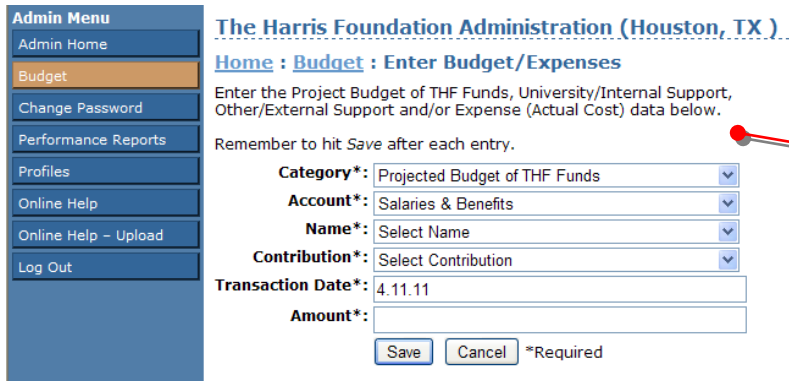
## How to Use This Guide

### IMS Manual Overview

This guide is designed to assist you and your organization to effectively use the Information Management System (IMS) for the ExxonMobil Bernard Harris Summer Science Camps. The IMS is comprised of two sections, the Performance and Budget /Expense Reporting features. Once you enter the required data, the IMS will be able to leverage your data to create the on-demand reports necessary to manage your specific camp site. This step-by-step guide includes easy-to-follow instructions as well as screen captures (see below) that provide you with an image of what you will be viewing as you go through the process.

#### Entering the EMBHSSC Budget Information

1. Click on **Enter Budget/Expenses**. This will open the standard data entry form that you will use to enter all budget and expense-related information.
2. From the **Category** dropdown menu select **Projected Budget of THF Funds**.



**Admin Menu**

- Admin Home
- Budget**
- Change Password
- Performance Reports
- Profiles
- Online Help
- Online Help - Upload
- Log Out

**The Harris Foundation Administration (Houston, TX)**

**Home : Budget : Enter Budget/Expenses**

Enter the Project Budget of THF Funds, University/Internal Support, Other/External Support and/or Expense (Actual Cost) data below.

Remember to hit Save after each entry.

**Category\***: Projected Budget of THF Funds

**Account\***: Salaries & Benefits

**Name\***: Select Name

**Contribution\***: Select Contribution

**Transaction Date\***: 4.11.11

**Amount\***:

\*Required

3. Next, use the **Account** drop-down to select the name of the account in which you will be budgeting a portion of The Harris Foundation Funds. In most cases, the account will contain several individual line items that relate specifically to that account, i.e., Account = Supplies and the individual line items for that account are Equipment, Printing, Purchased Services, Instructional Materials/Lab Supplies.

#### Section Name

Each section provides clear, easy-to-understand instructions.

#### Step-by-Step Instructions

Easy to follow instructions make navigating around the IMS a snap.

#### Screen Captures

Displays what you will see on the screen as you complete a step in the process.

## Username & Passwords

Each ExxonMobil BHSSC location has a site-specific username and password that allows you to access the IMS to enter, update and retrieve information.

We recommend you write your username and password in the space below for future reference. Remember to keep this manual handy when working on the IMS.

---

*Username*

*Password*

## Troubleshooting & Technical Support

If you are experiencing technical issues with the IMS, please contact the IMS Help Desk at **216.361.5555 x204 or x209**. Be prepared to leave a brief message that includes your name, your ExxonMobil BHSSC site location, the specific nature of your problem, and a daytime and evening phone number where you can be reached. IMS Help Desk personnel are committed to responding to all questions or problems within 24 hours.



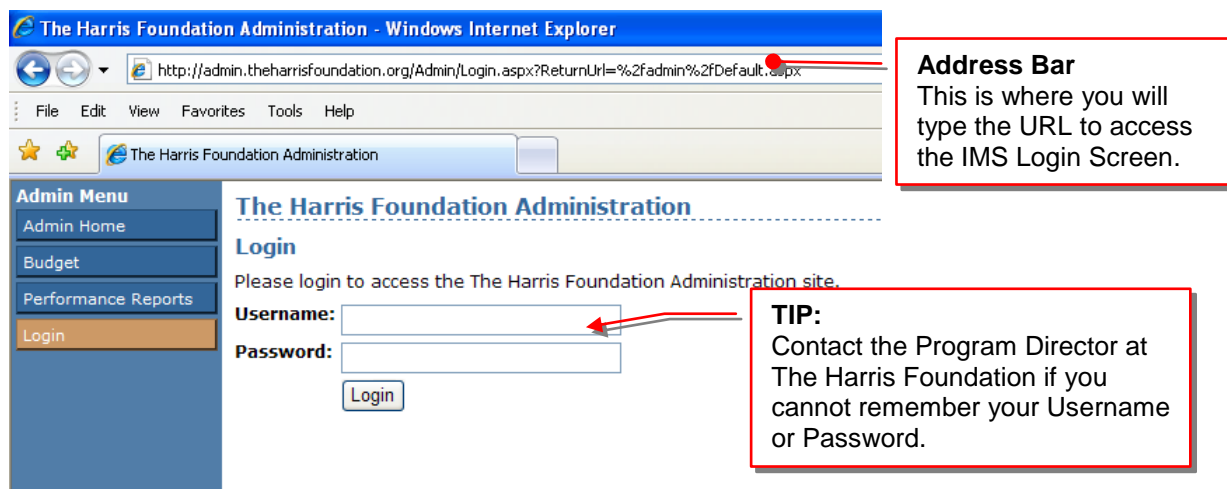
*An ExxonMobil BHSSC middle school student poses a question to founder, Dr. Bernard Harris, Jr., who spoke to all of the students about his life as a former NASA astronaut and the importance of pursuing STEM course subjects in high school and college.*

## Accessing the Information Management System

The IMS was designed to operate with Internet Explorer 6.0 or higher. Attempting to use an unsupported browser is not recommended. Data entered into the system may not be saved properly.

To access the IMS:

1. Launch **Internet Explorer** from the **Start** button on your taskbar.
2. Type [admin.theharrisfoundation.org/Admin/Login.aspx](http://admin.theharrisfoundation.org/Admin/Login.aspx) in the address bar. You might like to save this URL as a “Favorite” for easy future access. Once you are at the IMS login screen, press **ENTER**.



**Address Bar**  
This is where you will type the URL to access the IMS Login Screen.

**TIP:**  
Contact the Program Director at The Harris Foundation if you cannot remember your Username or Password.

3. Type your site-specific username and password.
4. Click **Login** to access your camp site home page.

The **Administration Homepage** is the starting point for all IMS applications. From here, you can launch the two main IMS applications: the IMS **Budget** and **Performance Reports** applications. You can also use the **Online Help** application to access a PDF version of the **IMS Manual**.

### DID YOU KNOW ...

You can also access the IMS login screen by clicking on the **Camp Administrators** link located on The Harris Foundation website. Enter your camp administrator username and password. Remember your camp administrator password and Paragon TEC passwords are different.

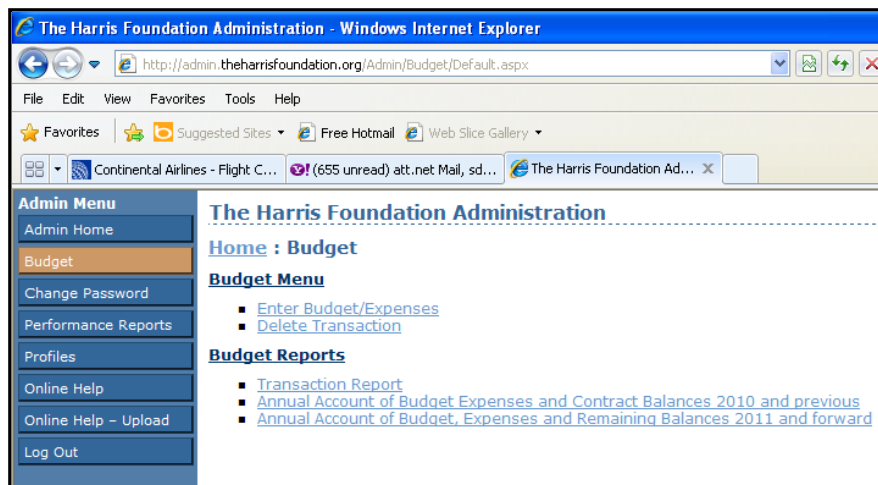
## Using the Budget/Expense Reporting Feature

The **Budget/Expense Reporting** section of the IMS is a great tool to help you quickly organize, report and view project finances. With just a few keystrokes, you will be able to input and update your **EMBHSSC Projected Budget and Expenses**, and review **Transaction Reports** and the **Annual Account of Budget, Expenses and Remaining Balances Report** for your EMBHSSC.

To assist you with completing the Budget, a Glossary of Terms is available on page 28-29.

## Using the Budget Application

Selecting **Budget** from the **Admin Menu** opens the **Budget Application** home page. The page is divided into two sections: **Budget Menu** and **Budget Reports**. The **Budget Menu** section will allow you to enter financial data into the system. It will also allow you to delete a transaction in the event that it was entered in error. The **Budget Reports** section contains two hyperlinks that will allow you to view data in the form of a report.

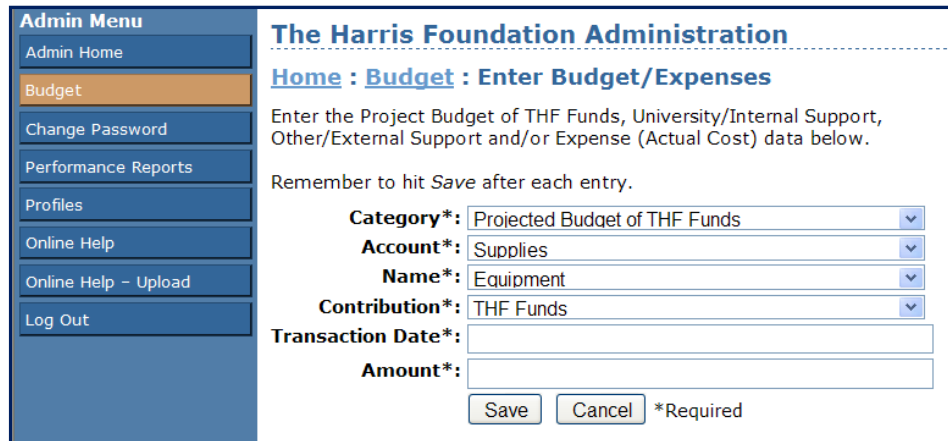


## ExxonMobil BHSSC Budget

### Entering the Projected Budget of The Harris Foundation (THF) Funds

Using your CFP budget form, enter your itemized EMBSSC administrative and operation costs into the **Enter Budget/Expenses** section of the IMS.

1. Select **Budget** from the **Admin Menu** to open the **Budget Application** home page.
2. Click on **Enter Budget/Expenses**. This will open the standard data entry form that you will use to enter all **Projected Budget of the THF Funds**.
3. Select **Projected Budget of the THF Funds** from the **Category** dropdown menu.



4. Next, click on the **Account** dropdown menu to select the name of the **Account** in which you will budget a portion of The Harris Foundation Funds.
5. In most cases in the next field, **Name**, you will find several individual line items that relate specifically to the selected **Account** field. For example, the **Name** field that coincides with the **Supplies Account** will have individual line items such as **Equipment**, **Printing**, **Purchased Services**, and **Instructional Materials/Lab Supplies** for you to select which identifies the specific **Account** line item for the portion of The Harris Foundation funds.
6. The **Contribution** field is the *type* of funds or support for the **Account** and **Name** item(s). You will have the default field of **THF Funds** to choose from upon entering your **Projected Budget of THF Funds**.
7. For the **Transaction Date** field, enter the date you are making the entry.

8. Enter the total budgeted amount for this **Account and Name** line item in the **Amount** field.

**The Harris Foundation Administration**

[Home](#) : [Budget](#) : Enter Budget/Expenses

Enter the Project Budget of THF Funds, University/Internal Support, Other/External Support and/or Expense (Actual Cost) data below.

Remember to hit Save after each entry.

**Category\*:** Projected Budget of THF Funds

**Account\*:** Staff

**Name\*:** Senior Counselor Staff

**Contribution\*:** THF Funds

**Transaction Date\*:** 4.12.11

**Amount\*:**

\*Required

**Amount Field**  
Use this space to enter the amount that you are budgeting for this item.


9. Once your entry is complete, click the **Save** button to ensure that your data will be stored in the IMS.

10. You will need to repeat steps 3-9 for each budgeted line item.

**Transaction Date\*:** 4.12.11

**Amount\*:**

\*Required

 **HELPFUL HINT**

Use your CFP budget form to guide you through the entries of the Projected Budget of The Harris Foundation Funds. These funds are the projected amounts of monies that will be used to administrate and operate the camp.

## Entering the Projected Budget Items for University/Internal Support

According to your CFP budget form, you will have line items that equal a combined total of Financial and In-kind University/Internal Support of at least 20% of the awarded THF funds. You create the University/Internal In-kind or Financial Support IMS budget entries in similar fashion to your Projected Budget of THF Fund entries (above).

1. Select **Budget** from the **Admin Menu** to open the **Budget Application** home page.
2. Click on **Enter Budget/Expenses** to open the data entry form that you will use to enter your Financial or In-kind University/Internal Support budget items.
3. Choose University/Internal Support (Minimum 20%) from the **Category** dropdown menu.

**The Harris Foundation Administration**

[Home](#) : [Budget](#) : Enter Budget/Expenses

Enter the Project Budget of THF Funds, University/Internal Support, Other/External Support and/or Expense (Actual Cost) data below.

Remember to hit Save after each entry.

**Category\***:

**Account\***:

**Name\***:

**Contribution\***:

**Transaction Date\***:

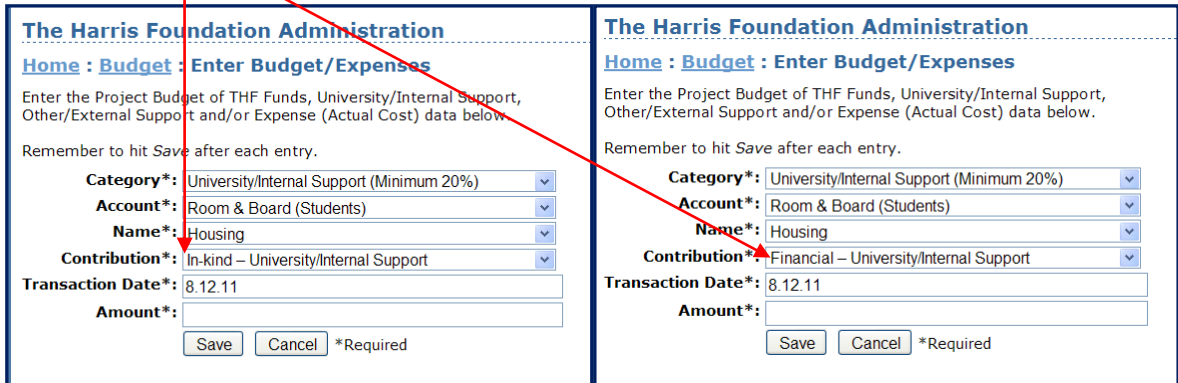
**Amount\***:

\*Required

4. Use the **Account** dropdown menu to select the name of the **Account** in which you will budget a portion of the University/Internal Support.
5. In most cases in the next field, **Name**, you will find several individual line items that relate specifically to the selected **Account** field. For example, the **Name** field that coincides with the Room & Board (Students) **Account** will have two individual line items, Housing and Meals for you to select which identifies the specific **Account** line item for the portion of the University/Internal Support.

6. The **Contribution** field is the *type* of funds or support for the **Account** and **Name** item(s). You will have two choices for the University/Internal Support (minimum 20%) **Category** upon entering your projected budget of line items:

- 1) In-kind – University/Internal Support or
- 2) Financial – University/Internal Support



**The Harris Foundation Administration**  
Home : Budget : Enter Budget/Expenses

Enter the Project Budget of THF Funds, University/Internal Support, Other/External Support and/or Expense (Actual Cost) data below.

Remember to hit Save after each entry.

Category\*: University/Internal Support (Minimum 20%)

Account\*: Room & Board (Students)

Name\*: Housing

Contribution\*: In-kind – University/Internal Support

Transaction Date\*: 8.12.11

Amount\*:

Save Cancel \*Required

---

**The Harris Foundation Administration**  
Home : Budget : Enter Budget/Expenses

Enter the Project Budget of THF Funds, University/Internal Support, Other/External Support and/or Expense (Actual Cost) data below.

Remember to hit Save after each entry.

Category\*: University/Internal Support (Minimum 20%)

Account\*: Room & Board (Students)

Name\*: Housing

Contribution\*: Financial – University/Internal Support

Transaction Date\*: 8.12.11

Amount\*:

Save Cancel \*Required

7. For the **Transaction Date** field, enter the date you are making the entry.
8. Enter the total budgeted amount for this **Account and Name** line item in the **Amount** field.
9. Once you have completed your entry, click the **Save** button to ensure that your entry has been saved to the IMS.
10. You will need to repeat steps 3-9 for each budgeted line item for University/Internal Support.

## Entering the Projected Budget Items for Other/External Support

It is possible that upon entering the projected budget items for your upcoming EMBHSSC, you know ahead of time the Other/External In-kind or Financial Support you will receive to help with camp operations, i.e., a 20% discount on the planetarium fees, or the science center will waive the entrance fees entirely, or you have a generous benefactor who will pay for all staff and students' entrance fees, transportation and/or a field trip meal. If that is the case, you will create these projected budget entries in a similar fashion to the projected budget entries for University/Internal Support (above).

1. Select **Budget** from the **Admin Menu** to open the **Budget Application** home page.

2. Click on **Enter Budget/Expenses** to open the data entry form that you will use to enter your Financial or In-kind Other/External Support budget items.
3. Choose Other/External Support from the **Category** dropdown menu.

**The Harris Foundation Administration**

[Home](#) : [Budget](#) : [Enter Budget/Expenses](#)

Enter the Project Budget of THF Funds, University/Internal Support, Other/External Support and/or Expense (Actual Cost) data below.

Remember to hit Save after each entry.

**Category\*:** Other/External Support

**Account\*:** Field Trip Expenses

**Name\*:** Fees

**Contribution\*:** In-kind – Other/External Support

**Transaction Date\*:** 7.14.11

**Amount\*:**

\*Required

4. Use the **Account** dropdown menu to select the name of the **Account** in which you will budget a portion of the Other/External Support.
5. In most cases in the next field, **Name**, you will find several individual line items that relate specifically to the selected **Account** field. For example, the **Name** field that coincides with the **Account**, Field Trip Expenses, will have three individual line items, Bus Transportation, Fees and Food for you to select which identifies the specific **Account** line item for the portion of the Other/External Support.
6. The **Contribution** field is the *type* of funds or support for the **Account** and **Name** item(s). You will have two choices for the Other/External Support **Category**:
  - 1) In-kind – Other/External Support or
  - 2) Financial – Other/External Support

<div style="border: 1px solid black; padding: 5px;"> <p><b>The Harris Foundation Administration</b></p> <p><a href="#">Home</a> : <a href="#">Budget</a> : <a href="#">Enter Budget/Expenses</a></p> <p>Enter the Project Budget of THF Funds, University/Internal Support, Other/External Support and/or Expense (Actual Cost) data below.</p> <p>Remember to hit Save after each entry.</p> <p><b>Category*:</b> Other/External Support</p> <p><b>Account*:</b> Field Trip Expenses</p> <p><b>Name*:</b> Fees</p> <p><b>Contribution*:</b> In-kind – Other/External Support</p> <p><b>Transaction Date*:</b> 7.14.11</p> <p><b>Amount*:</b> <input type="text"/></p> <p><input type="button" value="Save"/> <input type="button" value="Cancel"/> *Required</p> </div>	<div style="border: 1px solid black; padding: 5px;"> <p><b>The Harris Foundation Administration</b></p> <p><a href="#">Home</a> : <a href="#">Budget</a> : <a href="#">Enter Budget/Expenses</a></p> <p>Enter the Project Budget of THF Funds, University/Internal Support, Other/External Support and/or Expense (Actual Cost) data below.</p> <p>Remember to hit Save after each entry.</p> <p><b>Category*:</b> Other/External Support</p> <p><b>Account*:</b> Field Trip Expenses</p> <p><b>Name*:</b> Food</p> <p><b>Contribution*:</b> Financial – Other/External Support</p> <p><b>Transaction Date*:</b> 7.14.11</p> <p><b>Amount*:</b> <input type="text"/></p> <p><input type="button" value="Save"/> <input type="button" value="Cancel"/> *Required</p> </div>
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- For the **Transaction Date** field, enter the date you are making the entry.

**The Harris Foundation Administration**

**Home : Budget : Enter Budget/Expenses**

Enter the Project Budget of THF Funds, University/Internal Support, Other/External Support and/or Expense (Actual Cost) data below.

Remember to hit Save after each entry.

**Category\*:** Other/External Support

**Account\*:** Field Trip Expenses

**Name\*:** Fees

**Contribution\*:** In-kind – Other/External Support

**Transaction Date\*:** 7.14.11

**Amount\*:**

\*Required

**Amount Field**  
Use this space to enter the amount that you are budgeting for this In-Kind – Other/External Support item.

- Enter the total budgeted amount for this **Account and Name** line item in the **Amount** field.
- Once you have completed your entry, click the **Save** button to ensure that your entry has been saved to the IMS.
- You will need to repeat steps 3-9 for each budgeted line item for Other/External Support.

**Transaction Date\*:** 4.12.11

**Amount\*:**

\*Required

## Entering Line Items for the Project Expense (Actual Costs)

The last **Category** choice in the Budget Application interface, Expenses (Actual Costs), is the field you choose to enter the line items of your actual costs for your EMBHSSC.

1. Select **Budget** from the **Admin Menu** to open the **Budget Application** home page.
2. Click on **Enter Budget/Expenses** to open the data entry form that you will use to enter your expenses for your EMBHSSC.
3. Choose Expense (Actual Cost) from the **Category** dropdown menu.

**The Harris Foundation Administration**

[Home](#) : [Budget](#) : [Enter Budget/Expenses](#)

Enter the Project Budget of THF Funds, University/Internal Support, Other/External Support and/or Expense (Actual Cost) data below.

Remember to hit Save after each entry.

**Category\*:** Expense (Actual Cost)

**Account\*:** Staff

**Name\*:** Senior Counselor Staff

**Contribution\*:** In-kind – University/Internal Support

**Funding Source:** University of Southern Alabama

**Description of Contribution:** Senior Counselor Staff Salary

**Transaction Date\*:** 7.30.11

**Amount\*:**

\*Required

4. Use the **Account** dropdown menu to select the **Account** that you will be expensing.
5. In most cases, the next field, **Name**, you will find several individual line items that relate specifically to the selected **Account** field. For example, the **Name** field that coincides with the **Account**, Staff, will have five line items: Senior Counselor Staff, Junior Counselor Staff, Teachers/Faculty, Administrative/Other and Nurse for you to select which identifies the specific **Account** line item you are expensing.
6. The **Contribution** field is the *type* of funds or support that represents the actual cost for the **Account** and **Name** item(s). You will have five choices for the type of **Contribution**.
  - i. THF Funds
  - ii. In-kind – University/Internal Support
  - iii. Financial – University/Internal Support
  - iv. In-kind – Other/External Support
  - v. Financial – Other/External Support

**The Harris Foundation Administration**

**Home : Budget : Enter Budget/Expenses**

Enter the Project Budget of THF Funds, University/Internal Support, Other/External Support and/or Expense (Actual Cost) data below.

Remember to hit Save after each entry.

**Category\*:** Expense (Actual Cost)

**Account\*:** Staff

**Name\*:** Senior Counselor Staff

**Contribution\*:** In-kind – University/Internal Support

**Funding Source:** Select Contribution

**Description of Contribution:** THF Funds

**Transaction Date\*:** In-kind – University/Internal Support

**Amount\*:** Financial – University/Internal Support

In-kind – Other/External Support

Financial – Other/External Support

Save Cancel \*Required

The **Contribution Field** is the *type* of funds or support that represents the actual cost for the **Account** and **Name** item(s). Note the five choices for the type of **Contribution**.

- The next field, **Funding Source**, describes the entity that made the **Contribution** type. Examples of **Funding Source** could be THF Funds, the host University, a specific department within the host University (University of Houston Earth & Atmospheric Sciences Department) AISES, the 4H Club, Coca-Cola, Hayden Planetarium, etc.

**The Harris Foundation Administration**  
**Home : Budget : Enter Budget/Expenses**

Enter the Project Budget of THF Funds, University/Internal Support, Other/External Support and/or Expense (Actual Cost) data below.

Remember to hit Save after each entry.

**Category\*:** Expense (Actual Cost)

**Account\*:** Staff

**Name\*:** Senior Counselor Staff

**Contribution\*:** THF Funds

**Funding Source:** THF Funds

**Description of Contribution:** Senior Counselor Staff Salary

**Transaction Date\*:** 7.30.11

**Amount\*:**

Save Cancel \*Required

**The Harris Foundation Administration**  
**Home : Budget : Enter Budget/Expenses**

Enter the Project Budget of THF Funds, University/Internal Support, Other/External Support and/or Expense (Actual Cost) data below.

Remember to hit Save after each entry.

**Category\*:** Expense (Actual Cost)

**Account\*:** Staff

**Name\*:** Senior Counselor Staff

**Contribution\*:** In-kind – University/Internal Support

**Funding Source:** University of Wyoming

**Description of Contribution:** Senior Counselor Staff Salary

**Transaction Date\*:** 7.30.11

**Amount\*:**

Save Cancel \*Required

**The Harris Foundation Administration**  
**Home : Budget : Enter Budget/Expenses**

Enter the Project Budget of THF Funds, University/Internal Support, Other/External Support and/or Expense (Actual Cost) data below.

Remember to hit Save after each entry.

**Category\*:** Expense (Actual Cost)

**Account\*:** Staff

**Name\*:** Senior Counselor Staff

**Contribution\*:** In-kind – University/Internal Support

**Funding Source:** University of Houston Earth & Atmospheric Sciences

**Description of Contribution:** Senior Counselor Staff Salary

**Transaction Date\*:** 7.30.11

**Amount\*:**

Save Cancel \*Required

**The Harris Foundation Administration**  
**Home : Budget : Enter Budget/Expenses**

Enter the Project Budget of THF Funds, University/Internal Support, Other/External Support and/or Expense (Actual Cost) data below.

Remember to hit Save after each entry.

**Category\*:** Expense (Actual Cost)

**Account\*:** Field Trip Expenses

**Name\*:** Fees

**Contribution\*:** Financial – Other/External Support

**Funding Source:** Hayden Planetarium

**Description of Contribution:** Tickets to show "Journey to the Stars"

**Transaction Date\*:** 8.15.11

**Amount\*:**

Save Cancel \*Required

8. Once the Funding Source is described, the **Description of the Contribution** is the next field. The information in the **Account** and **Name** fields will provide a general description and in many cases will suffice for the **Description of the Contribution** field. However, oftentimes more detail of the field is necessary. For example, Travel Costs for Executive Director and Camp Program Director; Room Usage and Audio Visual Equipment for Media Day; Gym and Laundry Bags; Time and Fuel for Helicopter Flight; Materials and Lab Access for Experiments; Educational Presentations and Use of Nature Center, etc.
9. For the **Transaction Date** field, enter the date you are making the entry.
10. Enter the total budgeted amount for this **Account and Name** line item in the **Amount** field.
11. Once you have completed your entry, click the **Save** button to ensure that your entry has been saved to the IMS.
12. You will need to repeat steps 3-11 for each expense (see important note below).

**IMPORTANT – NOTE #1**

If a line item for **Expense (Actual Cost)** is paid for by more than one entity, for example, the THF Funds *AND* In-kind University/Internal Support paid the Room & Board (Group Leaders/Counselors), then TWO entries must be completed identifying both types of **Contributions, Funding Sources, Descriptions of Contributions, Transaction Dates** and **Amounts**.

**1. THF Funds Entry:**

The Harris Foundation Administration  
Home : Budget : Enter Budget/Expenses

Enter the Project Budget of THF Funds, University/Internal Support, Other/External Support and/or Expense (Actual Cost) data below.

Remember to hit Save after each entry.

Category\*: Expense (Actual Cost) [v]  
 Account\*: Room & Board (Group Leaders/Counselors) [v]  
 Name\*: Housing [v]  
 Contribution\*: THF Funds [v]  
 Funding Source: THF Funds  
 Description of Contribution: Housing Costs for Lead Dorm and Camp Counselors  
 Transaction Date\*: 8.18.11  
 Amount\*: [ ]

[ Save ] [ Cancel ] \*Required

**2. In-Kind University/Internal Support Entry:**

The Harris Foundation Administration  
Home : Budget : Enter Budget/Expenses

Enter the Project Budget of THF Funds, University/Internal Support, Other/External Support and/or Expense (Actual Cost) data below.

Remember to hit Save after each entry.

Category\*: Expense (Actual Cost) [v]  
 Account\*: Room & Board (Group Leaders/Counselors) [v]  
 Name\*: Housing [v]  
 Contribution\*: In-kind – University/Internal Support [v]  
 Funding Source: University of Oklahoma  
 Description of Contribution: Housing Costs for Lead Dorm and Camp Counselors  
 Transaction Date\*: 8.18.11  
 Amount\*: [ ]

[ Save ] [ Cancel ] \*Required

**IMPORTANT – NOTE #2**

Every entry for **Project Expense (Actual Costs)** will self-populate questions #2 and #3 in the Performance Report Section, Principle #6, Partnerships (all except THF Funds).

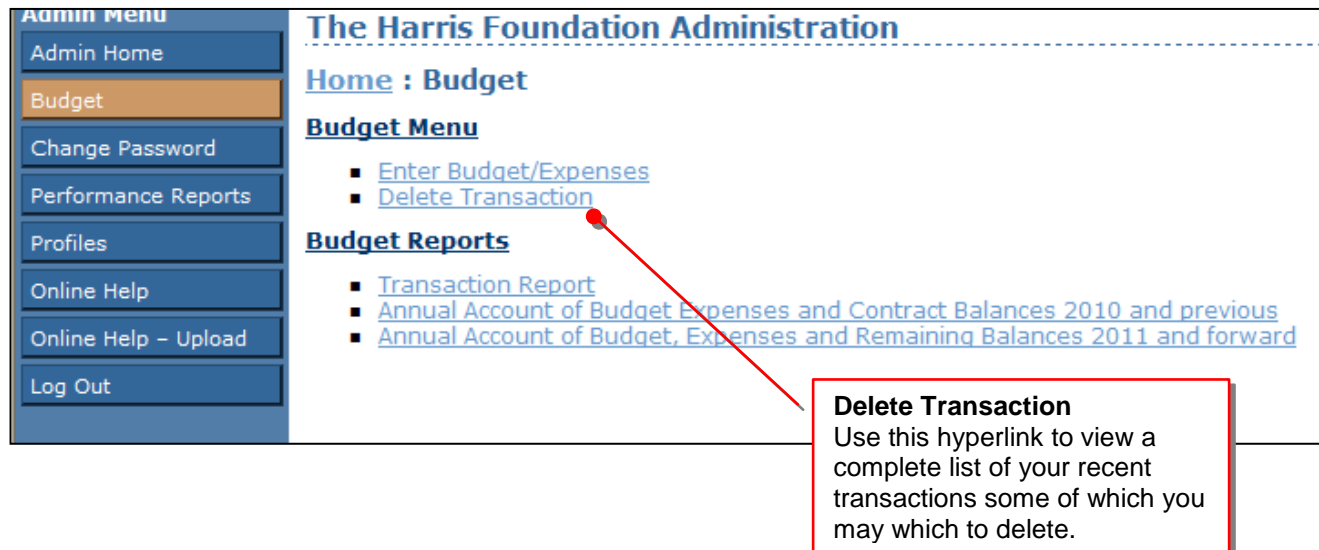
## Deleting a Transaction

Alright, you have made a mistake. You have entered the wrong amount or you entered the right amount into the wrong account. Whatever you did, you figured out that it was wrong. Now what do you do? How do you fix it? Can it be fixed?

Anything entered into the IMS can be removed and reentered. To delete a transaction, simply follow the steps below:

1. Click the hyperlink marked **Delete Transaction** from the **Budget Application Home Page**. This will open the **Delete Transaction** page. This will allow you to view a complete list of your transactions grouped by account.

Each transaction will include the transaction date, ID number, account, name, contribution, description of contribution and amount.



The screenshot shows the 'The Harris Foundation Administration' interface. On the left is an 'Admin Menu' with options: Admin Home, Budget (highlighted), Change Password, Performance Reports, Profiles, Online Help, Online Help - Upload, and Log Out. The main content area is titled 'Home : Budget' and contains a 'Budget Menu' with two items: 'Enter Budget/Expenses' and 'Delete Transaction'. Below this is a 'Budget Reports' section with three items: 'Transaction Report', 'Annual Account of Budget Expenses and Contract Balances 2010 and previous', and 'Annual Account of Budget, Expenses and Remaining Balances 2011 and forward'. A red callout box with a red dot pointing to the 'Delete Transaction' link contains the text: 'Delete Transaction Use this hyperlink to view a complete list of your recent transactions some of which you may which to delete.'

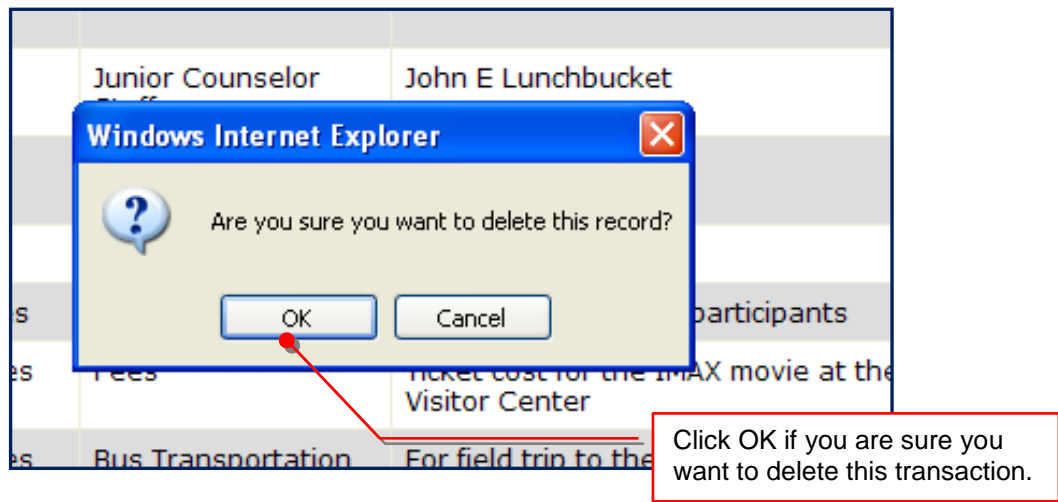
**The Harris Foundation Administration (Houston, TX)**  
 Home : Budget : Delete Transaction

	Tran Date	Tran ID	Category	Account	Name	Contribution	Description of Contribution	Amount
<a href="#">Delete</a>	7/14/2011	10120	Expense (Actual Cost)	Salaries & Benefits	Camp/Program Director	In-kind - Other/External Support	Backpacks	\$500.00
<a href="#">Delete</a>	7/11/2011	10101	Expense (Actual Cost)	Salaries & Benefits	Executive Director	In-kind - University/Internal Support	Executive Director Salary	\$2,000.00
<a href="#">Delete</a>	7/11/2011	10102	Expense (Actual Cost)	Salaries & Benefits	Executive Director	THF Funds	Executive Director Salary	\$2,000.00
<a href="#">Delete</a>	7/11/2011	10103	Expense (Actual Cost)	Salaries & Benefits	Lead Dorm Counselor	Financial - University/Internal Support	Lead Dorm Counselor Salary	\$500.00
<a href="#">Delete</a>	7/11/2011	10107	Expense (Actual Cost)	Staff	Senior Counselor	THF Funds	Senior Counselor Staff Salary	\$500.00
<a href="#">Delete</a>	7/11/2011	10109	Uni Int			In-kind - University/Internal Support		\$500.00
<a href="#">Delete</a>	7/11/2011	10108	Exp Cost			THF Funds	Secretary Salary	\$500.00
<a href="#">Delete</a>	7/11/2011	10106	Expense (Actual Cost)	Supplies	Equipment	THF Funds	Purchase of Microscopes	\$2,000.00

**Delete Transaction**  
 Click the Delete hyperlink to delete your transaction.

1. Click the **Delete** hyperlink to permanently remove the entry from the IMS once you have located the transaction you wish to delete.

As a precaution, the system is designed to ask you if this is really want you want to do. If it is, click the **OK** button. If not, simply select **Cancel**. Once the transaction has been deleted, return to the **Budget Application Home Page** to re-enter the transaction correctly.



## Accessing the Budget Reports

### Transaction Report

There are two reports associated with the Budget section of the IMS. The first is the **Transaction Report** which allows the user to quickly view all of the transactions grouped by account. Each transaction will include the transaction date, transaction ID number, category, account, and the name of the specific line item that the transaction was assigned. It also contains the type and description of the contribution that you entered, and the amount that was budgeted or expensed to that account line item. This report can be quite useful when conducting an internal audit.

To access this report:

1. Select **Budget** from the **Admin Menu** in the side bar. This will open the **Budget Application** home page.
2. Click on the **Transaction Report** hyperlink to open the report.

**The Harris Foundation Administration**  
Home : [Budget](#) : Transaction Report

Tran Date	Tran ID	Category	Account	Name	Contribution	Description of Contribution	Amount
7/14/2011	10101	Expense (Actual Cost)	Salaries & Benefits	Camp/Program Director	In-kind - Other/External Support	Backpacks	\$500.00
7/11/2011	10102	Expense (Actual Cost)	Salaries & Benefits	Executive Director	In-kind - University/Internal Support	Executive Director Salary	\$2,000.00
7/11/2011	10103	Expense (Actual Cost)	Salaries & Benefits	Lead Dorm Counselor	THF Funds	Executive Director Salary	\$2,000.00
7/11/2011	10107	Expense (Actual Cost)	Staff	Senior Counselor Staff	Financial - University/Internal Support	Lead Dorm Counselor Salary	\$500.00
7/11/2011	10109	University Internal/Support	Staff (Other)	Secretary	THF Funds	Senior Counselor Salary	\$500.00
7/11/2011	10109	University Internal/Support	Staff (Other)	Secretary	In-kind - University/Internal Support		\$500.00

Annotations in the image point to the following fields:

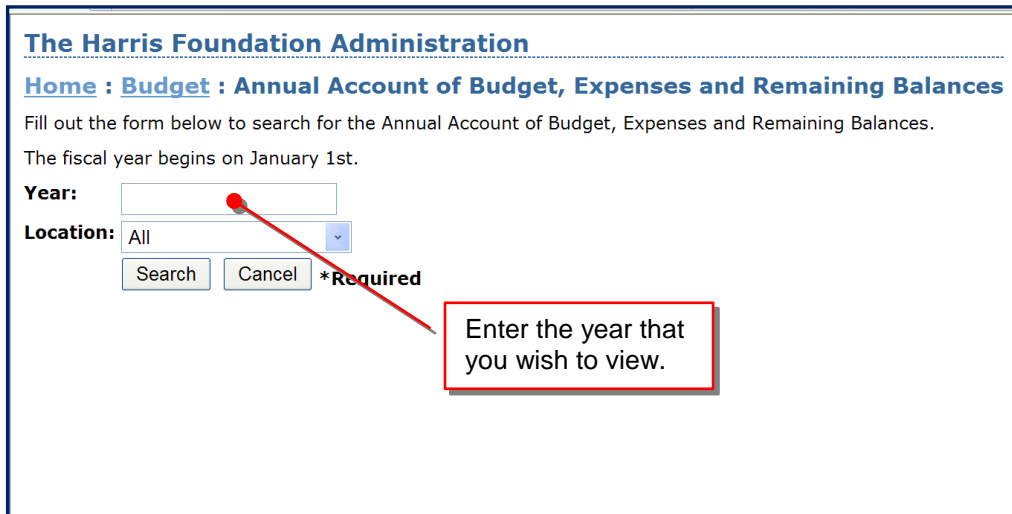
- Transaction Date
- Transaction ID
- Account
- Type of Contribution
- Line Item Name
- Description of Contribution
- Transaction Amount

## Annual Account of Budget, Expenses and Remaining Balances Report

The second report is the **Annual Account of Budget, Expenses and Remaining Balances**. This report provides the end user with an easy to follow, side-by-side comparison of budget vs. expenses grouped by reporting period (semesters).

To access this report:

1. Select **Budget** from the **Admin Menu** in the side bar. This will open the **Budget Application** home page.
2. Click on the **Annual Account of Budget, Expenses and Remaining Balances** hyperlink. This will open the report selection page where you will need to enter the fiscal year of the report.



**The Harris Foundation Administration**

[Home](#) : [Budget](#) : [Annual Account of Budget, Expenses and Remaining Balances](#)

Fill out the form below to search for the Annual Account of Budget, Expenses and Remaining Balances.

The fiscal year begins on January 1st.

**Year:**

**Location:** All

\*Required

Enter the year that you wish to view.

3. Click the **Search** button to view the report to open an online spreadsheet detailing the budget, expenses and remaining balances. The report will clearly indicate the following: the Projected Budget of THF Funds; Projected Budget of University/Internal Support; Projected Budget of Other/External Support; Spring, Summer and Fall Expenses; Expenses Entered After December 31<sup>st</sup>; Total Expenses; University/Internal In-kind Balance; Other/External In-kind Balance; University/Internal Financial Balance; Other/External Financial Balance; THF Funds Balance; and Total Balance.

Projected Budget of THF Funds

Account Categories and Names

Projected Budget of University/Internal Support

Projected Budget of Other/External Support

Category	Name	Projected Budget of THF Funds	Projected Budget of University/Internal Support	Projected Budget of Other/External Support	Spring Semester Expenses	Summer Semester Expenses	Fall Semester Expenses	Expenses Entered After 12/31	Total Expenses	University/Internal In-Kind Balance	Other/External In-Kind Balance	University/Internal Financial Balance	Other/External Financial Balance	THF Funds Balance	Total Balance
Salaries & Benefits	Camp/Program Director	\$0.00	\$0.00	\$0.00	\$0.00	\$5,000.00	\$0.00	\$0.00	\$5,000.00	(\$5,000.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Salaries & Benefits	Executive Director	\$4,000.00	\$0.00	\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$5,000.00	(\$1,500.00)	\$0.00	\$0.00	\$0.00	\$500.00	\$500.00
<b>Total Salaries &amp; Benefits</b>		<b>\$4,000.00</b>				<b>\$5,000.00</b>			<b>\$10,000.00</b>	<b>(\$6,500.00)</b>				<b>\$500.00</b>	<b>\$500.00</b>
<b>Total Project Administration</b>		<b>\$4,000.00</b>				<b>\$5,000.00</b>			<b>\$10,000.00</b>	<b>(\$6,500.00)</b>				<b>\$500.00</b>	<b>\$500.00</b>
Field Trip Expenses	Fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$750.00)	(\$750.00)
<b>Total Field Trip Expenses</b>		<b>\$0.00</b>				<b>\$0.00</b>			<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>(\$750.00)</b>	<b>(\$750.00)</b>
Room & Board (Group Leaders/Counselors)	Housing	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Room & Board (Group Leaders/Counselors)	Meals	\$0.00	\$6,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total Room &amp; Board (Group Leaders/Counselors)</b>		<b>\$0.00</b>	<b>\$11,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$11,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
Room & Board (Students)	Housing	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,500.00	(\$7,500.00)	\$0.00	\$0.00	\$1,000.00	\$1,000.00
<b>Total Room &amp; Board (Students)</b>		<b>\$1,000.00</b>				<b>\$0.00</b>			<b>\$0.00</b>	<b>\$7,500.00</b>	<b>(\$7,500.00)</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,000.00</b>	<b>\$1,000.00</b>
Staff	Senior Counselor Staff	\$1,505.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total Staff</b>		<b>\$1,505.00</b>				<b>\$0.00</b>			<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,005.00</b>	<b>\$1,005.00</b>
Staff (Other)	Secretary	\$500.00	\$0.00	\$0.00	\$0.00	\$500.00	\$0.00	\$0.00	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Staff (Other)	Teacher Assistant	\$0.00	\$0.00	\$0.00	\$2,500.00	\$0.00	\$0.00	\$0.00	\$2,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total Staff (Other)</b>		<b>\$500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$2,500.00</b>	<b>\$500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$3,500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
Supplies	Equipment	\$500.00	\$0.00	\$0.00	\$3,650.00	\$2,000.00	\$0.00	\$0.00	\$6,150.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$2,150.00)	(\$2,150.00)
<b>Total Supplies</b>		<b>\$500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$3,650.00</b>	<b>\$2,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$5,650.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>(\$2,150.00)</b>	<b>(\$2,150.00)</b>
<b>Total Summer Science Camp Operations</b>		<b>\$3,505.00</b>	<b>\$11,000.00</b>	<b>\$0.00</b>	<b>\$14,400.00</b>	<b>\$3,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$17,400.00</b>	<b>\$1,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,000.00</b>	<b>\$1,000.00</b>

Expenses (by Semester)

University/Internal In-kind Balance

Expenses Entered after 12/31

Other/External In-kind Balance

University/Internal Financial Balance

Other/External Financial Balance

Total Balance

THF Funds Balance

Other/External Financial Balance

University/Internal Financial Balance

Category	Projected Budget of THF Funds	Projected Budget of University/Internal Support	Projected Budget of Other/External Support	Spring Semester Expenses	Summer Semester Expenses	Fall Semester Expenses	Expenses Entered After 12/31	Total Expenses	University/Internal In-Kind Balance	Other/External In-Kind Balance	University/Internal Financial Balance	Other/External Financial Balance	THF Funds Balance	Total Balance
<b>Financial Total</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$2,150.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$2,150.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>(\$2,150.00)</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>(\$2,150.00)</b>
<b>In-Kind Total</b>	<b>\$0.00</b>	<b>\$11,000.00</b>	<b>\$0.00</b>	<b>\$11,500.00</b>	<b>\$5,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$16,500.00</b>	<b>(\$5,500.00)</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>THF Funds</b>	<b>\$7,505.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$5,750.00</b>	<b>\$3,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$8,750.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>(\$1,245.00)</b>	<b>(\$1,245.00)</b>
<b>Grand Total</b>	<b>\$7,505.00</b>	<b>\$11,000.00</b>	<b>\$0.00</b>	<b>\$19,400.00</b>	<b>\$8,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$27,400.00</b>	<b>(\$5,500.00)</b>	<b>\$0.00</b>	<b>(\$2,150.00)</b>	<b>\$0.00</b>	<b>(\$1,245.00)</b>	<b>(\$3,395.00)</b>

Category	Projected Budget of THF Funds	Projected Budget of University/Internal Support	Projected Budget of Other/External Support	Spring Semester Expenses	Summer Semester Expenses	Fall Semester Expenses	Expenses Entered After 12/31	Total Expenses	University/Internal In-Kind Balance	Other/External In-Kind Balance	University/Internal Financial Balance	Other/External Financial Balance	THF Funds Balance	Total Balance
<b>Financial Total</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$4,500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$3,500.00</b>	<b>\$0.00</b>	<b>\$3,500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,000.00</b>	<b>\$0.00</b>	<b>\$1,000.00</b>
<b>In-Kind Total</b>	<b>\$0.00</b>	<b>\$16,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$16,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$16,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>THF Funds</b>	<b>\$80,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$79,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$79,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,000.00</b>	<b>\$1,000.00</b>
<b>Grand Total</b>	<b>\$80,000.00</b>	<b>\$16,000.00</b>	<b>\$4,500.00</b>	<b>\$0.00</b>	<b>\$95,000.00</b>	<b>\$3,500.00</b>	<b>\$0.00</b>	<b>\$98,500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,000.00</b>	<b>\$1,000.00</b>	<b>\$2,000.00</b>

**See IMPORTANT NOTE 3a below.**

**See IMPORTANT NOTE 3b below.**


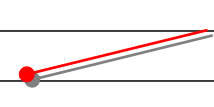
**See IMPORTANT NOTE 3c below.**

**IMPORTANT – NOTES 3a, 3b and 3c**

3a – The THF Grand Total must equal your total awarded funds on your CFP budget.

3b – The University/Internal Support must equal at least 20% of your awarded THF funds.

3c – These In-kind Balances must total out to zero to show that you have expensed every in-kind contribution.

<b>Prepared By</b>	
Date: 4/8/2011	
Site Director	
Phone #	
Signature	
Financial Officer	
Phone #	
Signature	

**IMPORTANT – NOTE #4**

There are two signature lines at the bottom of the page. The signatures of the Executive Camp Director and the designated financial officer will indicate that both have reviewed the report and have validated the all expenses shown. The Harris Foundation requires a signed copy of this document be sent to their headquarters by **December 15<sup>th</sup>**.

## Using the Performance Reporting Feature

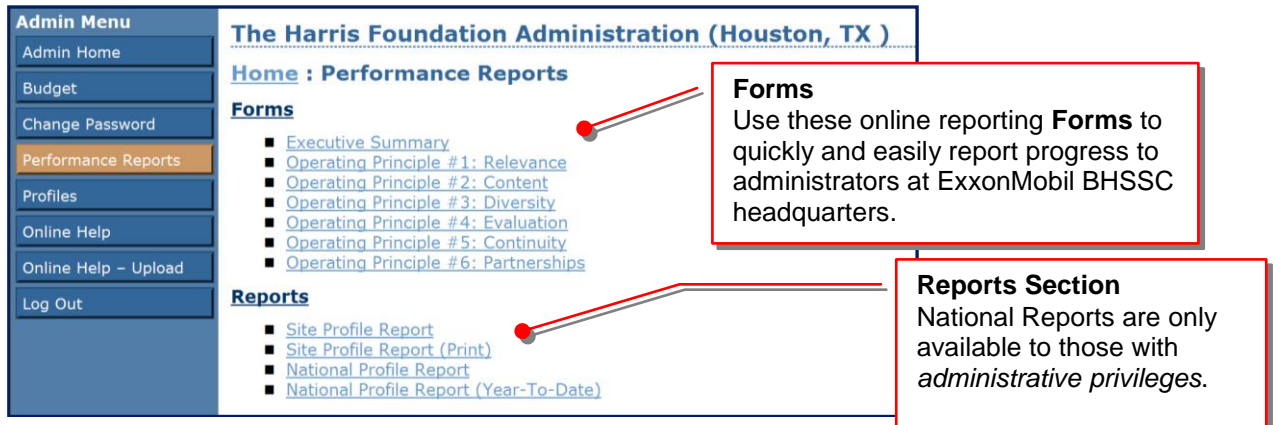
The **Performance Reporting** application of the IMS is a great tool to help you quickly organize and report on overall project performance at your site. By using the online reporting forms, you will be able to capture and report the kinds of information that project funders want and need to know. It also provides you with an opportunity to “sell” your program to current and potential funders that might never have the opportunity to visit your location.

### Entering Data for the Online Performance Reporting Forms

Follow the instructions below to begin entering information into the Performance Reports section of the IMS.

1. Select **Performance Reports** from the Admin Menu, starting from the Administration Homepage. This will open the **Report Menu** page.

The page is divided into two sections. The first section includes the various forms that you will use to enter information into the system. The second section contains four hyperlinks that will allow you to retrieve data in the form of a report.



The screenshot shows the 'The Harris Foundation Administration (Houston, TX)' page. On the left is the 'Admin Menu' with 'Performance Reports' selected. The main content area is titled 'Home : Performance Reports' and is divided into two sections: 'Forms' and 'Reports'. The 'Forms' section lists: Executive Summary, Operating Principle #1: Relevance, Operating Principle #2: Content, Operating Principle #3: Diversity, Operating Principle #4: Evaluation, Operating Principle #5: Continuity, and Operating Principle #6: Partnerships. The 'Reports' section lists: Site Profile Report, Site Profile Report (Print), National Profile Report, and National Profile Report (Year-To-Date). Two callout boxes are present: one for 'Forms' stating 'Use these online reporting Forms to quickly and easily report progress to administrators at ExxonMobil BHSSC headquarters.' and another for 'Reports Section' stating 'National Reports are only available to those with administrative privileges.'

2. Click on the hyperlink of the online reporting **Performance Report Forms** that you would like to work on first. There is no set order to completing the forms. However, we recommend you complete all of the Operating Principles 1-6 first before working on the **Executive Summary**. It will give you the opportunity to collect and organize your thoughts before you begin to summarize the activities at your site.

#### IMPORTANT - NOTE #5

We recommend that you create your Executive Summary in **Microsoft Word®**, then run the spell check, grammar check and character count tools. When you are ready to transfer your data from Microsoft Word to the IMS, cut and paste your comments directly into the text box on the form. Since the **Executive Summary** is limited to 4800 characters (approx. 700 words), *the report will not save if you have more than 4800 characters*. Look for the reminder message that will appear at the top of the page: **Executive Summary must not exceed 4800 characters**.

3. After selecting an online form to view or edit, a blank version of that form of the Executive Summary or Operating Principle will open on your computer screen. At the top of each online form are two dropdown menus that allow you to select the specific reporting period and year that you would view or edit. ***After selecting reporting period and year, click on View Report.***

There are hyperlinks for six online forms and a special hyperlink for the Executive Summary. A brief description of each form can be found below:

- a. **Executive Summary** – Allows the end user to update the basic information about your site and provides a place to summarize the activities that occurred at your program site. Maximum 4800 characters {approx. 700 words}.
- b. **Operating Principle #1: Relevance** – Enables you to capture important information about where and how your ExxonMobil BHSSC project site operated during each reporting period.
- c. **Operating Principle #2: Content** - Provides you with a place to record information about the core STEM subjects and the ExxonMobil BHSSC guiding principles that were addressed during the reporting period. There is also space to note the types of STEM professionals who were involved at the site as well as the learning techniques and resources employed.
- d. **Operating Principle #3: Diversity** – Captures and reports the gender, ethnicity, and economic status of all ExxonMobil BHSSC participants in relation to the general population of the community (as reported in the last US Census).
- e. **Operating Principle #4: Evaluation** – Captures and reports data relevant to the effectiveness of the project. The form contains space to record the results of student pre and post testing, student interest levels (both before and after their participation in the project), Participant comments, and a place to report on any special awards or recognition that the local site may have received because of their involvement in the project.
- f. **Operating Principle #5: Continuity** – Provides a space to report on the activities of former ExxonMobil BHSSC participants. This online form lets you tell them where those former students are and what other doors were opened to them because of their participation in the project.
- g. **Operating Principle #6: Partnership** – Provides a place to capture and report any additional gifts or contributions received beyond the funding provided by The Harris Foundation. This includes other contributions received from corporate donors, private donors, or grants and scholarships.

**Admin Menu**

- Admin Home
- Budget
- Change Password
- Performance Reports
- Profiles
- Online Help
- Online Help - Upload
- Log Out

**The Harris Foundation Administration**

**Home : Performance Reports : Operating Principle #1: Relevance**

**Select Location:**

**Report Period:**

**Current Quarter:** (Quarter: Winter Semester, Year: 2011)

Please answer the following questions and click Save to record your answers.

- Which of the following accurately describes this site?**
  - Urban  Rural
- Where were BHSSC classes held during your summer camp? (Check all that apply)**
  - 2-year College
  - 4-year College/University
  - Primary/Secondary
  - Museum /Planetarium
  - Community Center
  - Industry or Private Sector Facilities
  - Other:

**Reporting Period** – These dropdown menus allow you to select the *Semester* and *Year* of the report you wish to review or edit.

All ExxonMobil BHSSC sites must provide follow-up activities. Therefore, the IMS has been configured to capture data in three reporting periods called **semesters**. Typically, you will have **15 days from the end of each semester** to enter your performance data for that reporting period into the system.

After 15 days, the system will automatically lockout any attempts to add or delete data into that semester. Any data entered after the lockout date will automatically be recorded in the next reporting period, with the exception of the lockout date for the Fall Semester. To meet year-end reporting requirements, the lockout date for this reporting period has been moved forward by 30 days.

Because the system has its own internal calendar, the default reporting period will always be the current semester. If you wish to view or edit a previous semester, use the dropdown menu to select your desired semester. Refer to the following chart for the inclusive dates and lockout dates for each reporting period.

Reporting Period	Inclusive Dates	IMS Lockout Date
Winter/Spring	Jan 1 – Apr 30	May 15
Summer	May 1 – Aug 15	Sep 2
Fall	Aug 16 – Dec 31	Nov 30

*\*Indicates an early lockout date for year-end reporting*

After selecting the reporting period, you are ready to enter the data. Each online form asks a series of relatively straight-forward questions. For your convenience, most can be answered by checking a box, selecting an answer from a dropdown menu or typing information into a field.

These fields allow you to provide the reader with a clear understanding of what you did, how you did it, and who was involved. The narrative that you enter in these fields will be critical to future projects. Be sure to take your time and tell your story.

4. When you have answered all of the applicable questions on an online form, click the **Save Report** button at the bottom of the page to save your work. You can also use this button if you get interrupted. You can always come back later and complete the report.



Broadcast Television/Cable Television Advertising  
 Flyers/Posters  
 Presentations/Trade Show  
 Internet  
 Word of Mouth  
 Other:

9. Did the program provide some means to promote ongoing communications among former participants during your summer camp?

Yes  No

10. If yes, how was it accomplished? (Check all)

Newsletter  
 Direct Mail  
 E-mail/Website  
 Other:

**Save Report**  
This button will allow you to save the data entered to the IMS.

**Report Menu**  
This button will take you back to the Report Menu page.

5. After saving the report, and when ready, click on the **Report Menu** button at the bottom of the page or the **Performance Reports** hyperlink at the top of the page to return to the report menu page.

## Generating Site and National Profile Performance Reports

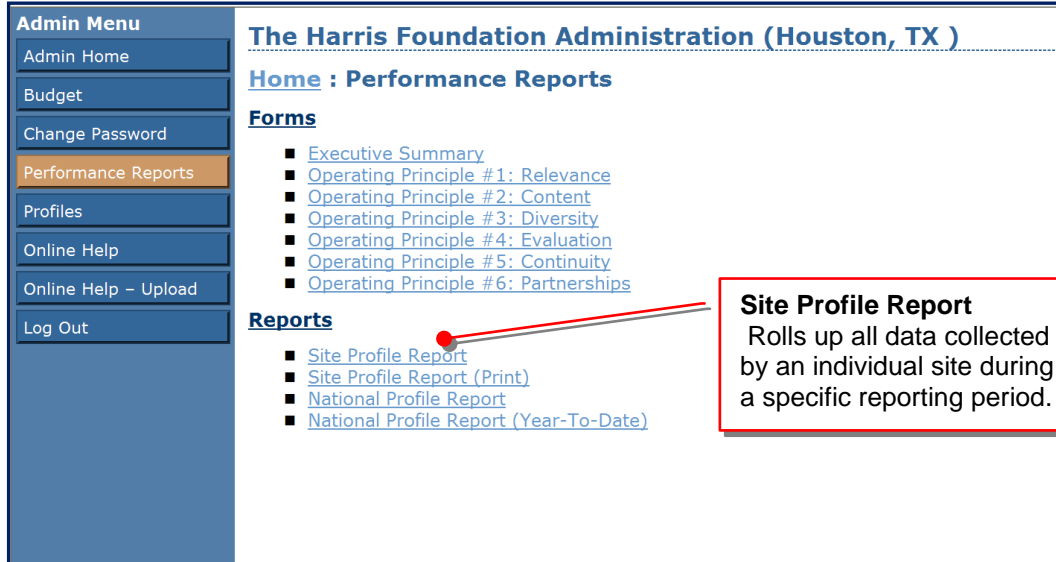
There are four reports associated with the Performance Reports application of the IMS, two **Site Profile Reports** and two **National Profile Reports**. The site reports are available to any logged-in user, and the national reports are available to users with administrative privileges.

The **Site Profile Report** allows the user to quickly rollup all the data collected by an individual site for a specific reporting period and present the information in an online report.

The data contained in this report is submitted to project stakeholders and are used by National project officials to attract potential project sponsors and justify project funding.

To access the **Site Profile Report**:

1. Select **Performance Reports** from the Admin Menu on the Administration Homepage. This will open the **Report Menu** page.
2. Click on **Site Profile Report**. This will open the online version of the report.



The screenshot shows the 'Admin Menu' on the left with 'Performance Reports' selected. The main content area is titled 'The Harris Foundation Administration (Houston, TX)' and 'Home : Performance Reports'. Under the 'Forms' section, there are links for 'Executive Summary' and six 'Operating Principle' reports. Under the 'Reports' section, there are four links: 'Site Profile Report', 'Site Profile Report (Print)', 'National Profile Report', and 'National Profile Report (Year-To-Date)'. A red callout box points to the 'Site Profile Report' link with the text: 'Site Profile Report: Rolls up all data collected by an individual site during a specific reporting period.'

3. Use the **Report Period** dropdown menu to select the semester and year you wish to view. Click the **View Report** button to access the desired report.

<b>Admin Menu</b>	<b>The Harris Foundation Administration (Houston, TX )</b>
Admin Home	<a href="#">Home</a> : <a href="#">Performance Reports</a> : <a href="#">Site Performance Report</a>
Budget	<b>Contract No. NAS3-02123</b>
Change Password	Select the location, quarter, and academic year; then click View Report to view the print friendly version of the Site Profile report
Performance Reports	<b>Select Location:</b> <input type="text" value="The Harris Foundation"/>
Profiles	<b>Report Period:</b> <input type="text" value="Summer Semester"/> <input type="text" value="2011"/>
Online Help	<input type="checkbox"/> <b>Quarterly Reports (Legacy)</b>
Online Help – Upload	<input type="button" value="View Report"/>
Log Out	

Your viewable report will contain all of the collected data for the selected reporting period grouped by the following subject areas:

- Executive Summary
- Relevance
- Content
- Diversity
- Evaluation
- Continuity
- Partnerships

The second report is a printable version of **Site Profile Report** which can be accessed by clicking on the **Site Profile Report (Print)** hyperlink from the **Report Menu** page.

The two remaining reports will provide the user with administrative privileges with information on a National level. The first of these is the **National Profile Report**. Similar to a **Site Profile Report**, the **National Profile Report** rolls up all of the data collected by every site for a specific reporting period. The report presents the information in an online format.

The second report is the **National Profile Report (Year-to-Date)**. As the name implies, it rolls up similar information for the entire year. Both reports are accessible through the **Report Menu**.

## Abbreviated Glossary of EMBHSSC IMS Terms

### Budget Category or Types of Contributions

#### **Projected Budget of THF Funds**

The THF Funds are monies awarded to each EMBHSSC site upon acceptance of their submitted proposal. The Projected Budget of THF Funds is the projected monies found on your CFP budget form that must be entered to document the funds that will be used to administrate and operate the camp.

#### **In-Kind – University/Internal Support**

These contributions are specified as other than monetary contributions. It is an in-kind contribution, which is voluntarily transferred from one entity to another within the institution without charge or consideration, e.g., camp administrator/staff salaries; classrooms, meeting and dorm space; office supplies; use of equipment; etc.

All gifts of the use of space, educational materials, office supplies, equipment, etc. are to be valued based upon what it would cost your institution to purchase the item. When a piece of equipment or use of space, for example, is provided on a short-term basis, the value of the gift is considered to be the amount that it would have cost the University to lease the equipment or rent the space for that amount of time.

#### **Financial – University/Internal Support**

These funds are monies that were included on the CFP as part of or the entire required 20% match from your university.

#### **Minimum 20%**

The combined total of Financial and In-kind University/Internal Support must equal at least 20% of the awarded THF funds. This amount was included on the CFP budget form.

#### **In-Kind – Other/External Support**

These contributions are specified as other than monetary contributions received from a source other than the university. It is an in-kind, which is voluntarily transferred from one entity to another without charge or consideration, e.g., classroom, meeting space; office supplies; use of equipment; prizes; etc.

#### **Financial – Other/External Support**

These contributions are specified as monetary contributions received from a source other than the university in which an invoice was generated, submitted for payment and/or a check was generated and cashed.

## Budget Account Terms

### Extended Activities

These are follow-up activities that occur after your two-week EMBHSSC.

### Indirect Cost Related to Overall Operations (not to exceed 9%)

Indirect costs represent the expenses of conducting the camp that are not readily identified with the grant's required budget lines, but are necessary for the general operation of the camp and the conduct of its activities. Indirect costs categories are depreciation and use allowances, general administration and general expenses, operation and maintenance expenses, library expenses, and departmental administration expenses. For example: clerical assistance, fringe benefits, express mail service, computer software and supplies, printing, and telephone charges.

### Staff (Other)

This includes any clerical, administrative or instructional personnel that are not listed on the dropdown menu. These include grad students, consultants, group leaders, health counselors and paid outside presenters.

### Administrative/Other

Anyone that serves in an administrative capacity that is not included on the drop down menu.

## Budget Report Terms

### Transaction Date

This is the date that the entry is made.

### Transaction ID #

This is a computer-generated number that can be used to identify each individual transaction. The number should be placed on invoices, packing slips, payroll and other records.

## Important Contact Information

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