Survey Research Operations

Monthly Project Report

Development Initiative and No Data Collection Projects

January 2016

Developmental Initiatives

(DRI Maintenance 2014-15) DRI Maintenance
(GIT AASRO) GIT AASRO
(Illume support 2014-2015) Illume support 2014-2015
(QC/QA/OLIVE 3.0) QC/QA/OLIVE 3.0
(GIT Update) SRC--GIT Update
(Tenrox Upgrade) SRO Tenrox Field Time & Expense Replacement Project

Project Name	DRI Maintenance (DRI Maintenance 2014-15)
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

Budget	***Direct Budget:*** 5,000.00 ***InDirect Budget:*** 0.00 ***Total Budget:*** 5,000.00

**Principal
Investigator/Client**

**Funding Agency
IRB**   ***HUM#:***   ***Period Of Approval:***

Project Team	***Project Lead:***	Marsha S Skoman
	Budget Analyst:	Bethany Benton
	Production Manager:	
	Senior Project Advisor:	Gina-Qian Yang Cheung
	Production Manager:	
	Production Manager:	

Proposal #:	no data
Description:	Maintenance for existing DRI (Digitally Recorded Interviews) systems.

SRO Project Period	07/2014 - 06/2015
Data Col Period	
Security Plan	NA
Milestone Dates	

PreProduction Start:	***Pretest Start:***
Pretest End:	***Recruitment Start:***
Staffing Completed:	***GIT Start:***
SS Train Start:	***SS Train End:***
DC Start:	***DC End:***

Other Project Team Members:	Lawrence Daher, Youhong Liu, Marsha Skoman, Peter Sparks, Deborah Wilson
Other Project Names:	
Sample Mgmt Sys	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Jan, 2016 (DRI Maintenance 2014-15) **Project Phase** Initiation
Risk Level	*Not Rated*
Monthly Update	No update information available.
Special Issues	

| **Cost**
Feb 29, 2016		
Total Cost to Date (Direct + Indirect):	0.00
Estimated Cost at Completion (E$AC):	0.00
Total Budget:	5,000.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	

Projections
Feb 29, 2016

Dollars Projected For Month: 0.00
Actual Dollars Used: 0.00
Variance (Projected minus Actual):   0.00
Reason For Variance:

Measures

	Units Complete	RR	HPI	
Current Goal:				
Goal at Completion:				
Current actual:				
Estimate at Complete:				
Variance:				

Other Measures

Project Name	GIT AASRO (GIT AASRO)
Project Mode	Primary: Not Available Secondary: Not Available
Project Type	Developmental Initiatives **Project Status** Current
Budget	*Direct Budget:* 0.00 *InDirect Budget:* 0.00 *Total Budget:* 0.00
Principal Investigator/Client	
Funding Agency	
IRB	*HUM#:* *Period Of Approval:*
Project Team	*Project Lead:* Beth-Ellen Pennell
	Budget Analyst:
	Production Manager:
	Senior Project Advisor:
	Production Manager: Lisa Holland
	Production Manager: Jody Dougherty
Proposal #:	no data
Description:	SRO is working with UW and UMASS to update content and design for development of an AASRO initiative to provide a CBT GIT for that would be made available to all AASRO organizations. SRO will use this content and design to base further development SRO's both at home GIT work as well as in-person. In partnership with UW and UMASS, SRO will produce content outline, training design proposal, technical development and project milestones to meet a deadline of some content developed by Spring 2014.
SRO Project Period	01/2013 - 03/2014
Data Col Period	
Security Plan	

Milestone Dates

PreProduction Start:	*Pretest Start:*
Pretest End:	*Recruitment Start:*
Staffing Completed:	*GIT Start:*
SS Train Start:	*SS Train End:*
DC Start:	*DC End:*

Other Project Team Members:	
Other Project Names:	
Sample Mgmt Sys	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Jan, 2016 (GIT AASRO) **Project Phase** Initiation
Risk Level	*Not Rated*
Monthly Update	No update information available.
Special Issues	

Cost
Feb 29, 2016

Total Cost to Date (Direct + Indirect):	0.00
Estimated Cost at Completion (E$AC):	0.00
Total Budget:	0.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	

Projections
Feb 29, 2016

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:			
Current actual:			
Estimate at Complete:			
Variance:			

Other Measures

Project Name	Illume support 2014-2015 (Illume support 2014-2015)
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

			Project Status	Current	

Budget	*Direct Budget:*	25,000.00	*InDirect Budget:*	0.00	*Total Budget:*	25,000.00

Principal Investigator/Client

Funding Agency

IRB	*HUM#:*		*Period Of Approval:*
Project Team	*Project Lead:*	Hueichun Peng	
	Budget Analyst:	Bethany Benton	
	Production Manager:		
	Senior Project Advisor:	Gregg Peterson	
	Production Manager:		
	Production Manager:		

Proposal #: no data

Description: This project is the ongoing Illume support and technical development, during the fiscal year 2014-2015. Team has met in July to set up the areas to focus on for the fiscal year when budgets are available.
1. Use Footprint to log request
2. Illume usage guide and best practice of using Illume
3. Generic Mobile Style Sheet
4. Para Data Enhancement
5. Set up a feature/demo survey and a survey specifically for Mobile
6. Retire 4.7 and create a testing environment for the latest Illume engine

SRO Project Period 07/2014 - 06/2015

Data Col Period

Security Plan NA

Milestone Dates

PreProduction Start:		*Pretest Start:*	
Pretest End:		*Recruitment Start:*	
Staffing Completed:		*GIT Start:*	
SS Train Start:		*SS Train End:*	
DC Start:		*DC End:*	

Other Project Team Members: Andy Hupp, Meredith House, Robert Fenton, Max.

Other Project Names:

Sample Mgmt Sys	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

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Report Period	Jan, 2016 (Illume support 2014-2015)	**Project Phase**	Initiation
Risk Level	*Not Rated*		
Monthly Update	No update information available.		
Special Issues			

Cost
Feb 29, 2016

Total Cost to Date (Direct + Indirect):	0.00
Estimated Cost at Completion (E$AC):	0.00
Total Budget:	25,000.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	

Projections
Feb 29, 2016

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:			
Current actual:			
Estimate at Complete:			
Variance:			

Other Measures

Project Name	QC/QA/OLIVE 3.0 (QC/QA/OLIVE 3.0)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives	**Project Status**	Current
Budget	*Direct Budget:* 30,000.00	*InDirect Budget:* 0.00	*Total Budget:* 30,000.00

Principal Investigator/Client

Funding Agency

IRB	*HUM#:*		*Period Of Approval:*	
Project Team	*Project Lead:*	Joel Devonshire		
	Budget Analyst:	Bethany Benton		
	Production Manager:			
	Senior Project Advisor:	Jody Dougherty		
	Production Manager:			
	Production Manager:			

Proposal #:	no data
Description:	Technical development initiative for the Online Interviewer Evaluation and Verification system (OLIVE 3.0), as well as related interviewer quality control and assurance systems, such as dynamic interview recording flagging. The main dimensions to this project involve updating and maintaining OLIVE, as well as enhancing our verification systems and developing a new dynamic flagging system.

SRO Project Period 07/2014 - 06/2015
Data Col Period
Security Plan NA
Milestone Dates

PreProduction Start:		*Pretest Start:*	
Pretest End:		*Recruitment Start:*	
Staffing Completed:		*GIT Start:*	
SS Train Start:		*SS Train End:*	
DC Start:		*DC End:*	

Other Project Team Members:	Technical team consists of Joel Devonshire, David Padot, Lawrence Daher, Minako Edgar, and David Dybicki.
Other Project Names:	
Sample Mgmt Sys	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Jan, 2016 (QC/QA/OLIVE 3.0)	**Project Phase**	Initiation
Risk Level	*Not Rated*		
Monthly Update	No update information available.		
Special Issues			

Cost
Feb 29, 2016

Total Cost to Date (Direct + Indirect):	0.00
Estimated Cost at Completion (E$AC):	0.00
Total Budget:	30,000.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	

Projections
Feb 29, 2016

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:			
Current actual:			
Estimate at Complete:			
Variance:			

Other Measures

Project Name	SRC--GIT Update (GIT Update)
Project Mode	Primary: Not Available Secondary: Not Available
Project Type	Developmental Initiatives

Project Status   Current

Budget	*Direct Budget:* 0.00	*InDirect Budget:* 0.00	*Total Budget:* 0.00

Principal Investigator/Client

Funding Agency

IRB   *HUM#:*   *Period Of Approval:*

Project Team   *Project Lead:*   Jody Dougherty
            Budget Analyst:
            Production Manager: Barbara Aghababian-Homburg
            Senior Project Advisor:
            Production Manager:
            Production Manager:

Proposal #:   no data

Description: The goal of this project is to revise the computer-based training (CBT) given to new employees prior to an in-class training program.

Specifically, SRO will review it's streaming video, class room material, and assessments to make critical updates to content. Most importantly prepare the material so that it can be loaded into a Learning Management System (Moodle). Timeline is to launch new material/content in January 2014.

SRO Project Period   01/2013 - 12/2014
Data Col Period
Security Plan
Milestone Dates

PreProduction Start:	*Pretest Start:*
Pretest End:	*Recruitment Start:*
Staffing Completed:	*GIT Start:*
SS Train Start:	*SS Train End:*
DC Start:	*DC End:*

Other Project Team Members:
Other Project Names:

Sample Mgmt Sys	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Jan, 2016 (GIT Update)	**Project Phase**	Initiation
Risk Level	*Not Rated*		
Monthly Update	No update information available.		
Special Issues			

Cost
Feb 29, 2016

Total Cost to Date (Direct + Indirect):	0.00
Estimated Cost at Completion (E$AC):	0.00
Total Budget:	0.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	

Projections
Feb 29, 2016

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:			
Current actual:			
Estimate at Complete:			
Variance:			

Other Measures

Project Name	SRO Tenrox Field Time & Expense Replacement Project (Tenrox Upgrade)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives	**Project Status**	Current
Budget	*Direct Budget:* 380,000.00	*InDirect Budget:* 0.00	*Total Budget:* 380,000.00

Principal Investigator/Client   Patty Maher (SRO)

Funding Agency

IRB   *HUM#:*   *Period Of Approval:*

Project Team		
	Project Lead:	Ryan Neice
	Budget Analyst:	Carl S Remmert
	Production Manager:	
	Senior Project Advisor:	Ryan Neice
	Production Manager:	Barbara Lohr Ward
	Production Manager:	

Proposal #:   no data

Description: This is a project to select, procure and implement a replacement for the legacy Tenrox field interviewer time & expense processing system.

SRO Project Period   07/2014 - 06/2015

Data Col Period

Security Plan   NA

Milestone Dates

PreProduction Start:	*Pretest Start:*
Pretest End:	*Recruitment Start:*
Staffing Completed:	*GIT Start:*
SS Train Start:	*SS Train End:*
DC Start:	*DC End:*

Other Project Team Members:
Ryan Neice - Senior Project Advisor
Jody Dougherty - Senior Project Advisor
Barb Ward - Project Manager
Jas Sokhal - Technical Lead
Programmer TBD

Other Project Names:

Sample Mgmt Sys	NA
Data Col Tool	NA
Hardware	Laptop; Desktop
DE Software	N/A
QC Recording Tool	N/A
Incentive	Not used
Administration	N/A
Payment Type	N/A
Payment Method	N/A

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Report Period	Jan, 2016 (Tenrox Upgrade)	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update   Activities for January 2016
Administrative/Project Management Tasks
- Met biweekly with the Tenrox project manager to review progress, task assignments, schedule
- Met weekly with SRO Tenrox Lead team to make configuration decisions, assign tasks.
- Held weekly planning meetings with the ISR Business Office to discuss roll out plans/progress
- Monitored schedule for roll out, revised as necessary
  - o Jan 4 go/no go decision, deferred for further testing
  - o Jan 10, deferred for SurveyTrak changes, project report testing
- Jan 25, 2016 selected alternative roll out date

Upgrade Preparation
- Copied test database to production environment with assistance of Tenrox technical team.
- Obtained CCB permission to proceed ODBC install on NSFG servers, and with permission to punch hole for NSFG interviewers to access Tenrox.
- Installed and tested ODBC on SRO production servers (including NSFG servers)
- Input/updated projects, created tasks, for all production projects
- Updated users, changed roles, added new employees.
- Input project teams and created task assignments for team members for all current production projects.
- Conducted two use-case production tests, plus additional cases as necessary to test Survey Trak.
o Data entered test cases and cash upload cases.
o Tested/revised export query to SRO financial databases
o Tested/revised export queries to ISR Business Office/MPathways
o Made data structure and query revisions as necessary.
- Continued work on reporting utility
o Tested user-interface to access created reports. Added staff to reporting tool as necessary
o Created additional reports
o Made formatting and programming changes to draft reports
- Promoted all stored procedures to "production" and tested
- Ran scripts to clean all testing data
- Reset all passwords, created documentation on how to reset passwords

Training Team
- Finalized training materials for on-staffers.
- Training for on-staffers began on Jan 18, 2016

Implementation
- Closed future pay periods in legacy Tenrox
- Emailed instructions to users on resetting shortcut for Tenrox2
- Provided support to users on accessing the new system
- Repaired task connections that were destroyed during data cleaning
- Input/updated task assignments for projects
- Triaged other problems
- Began training documentation for Finance Team

Cost information:
Total project funding available:	$	380,000
Total Expended as of 12/31/2015	$	254,312*
Expected cost at complete:	$	335,443
Expected Variance:	$	44,557

*$119,000 of the expended cost was for Tenrox software licensing, maintenance and installation fees, paid in advance.

Special Issues

Project Risks/Concerns
- We are continuing to triage and fix problems with user assignments, created when the script to clean transactions was run.
- We will set up a Footprints system for requests for or changes to project assignments. This will help the Finance/DCS team to better triage issues and will provide feedback to the project team when the requested work has been completed.
- We are working to create documentation for standard tasks, both for the Finance team and the ISR Business Office team.

Cost
Feb 29, 2016

Total Cost to Date (Direct + Indirect):	254,312.00
Estimated Cost at Completion (E$AC):	335,443.00
Total Budget:	380,000.00
Variance (Budget minus E$AC):	44,557.00
Reason For Variance:	Many staff members charged unit overhead for work, instead of charging the project budget.

Projections
Feb 29, 2016

Dollars Projected For Month:	39,935.00
Actual Dollars Used:	16,676.00
Variance (Projected minus Actual):	23,257.00
Reason For Variance:	Many staff members charged unit overhead accounts instead of charging the project budget.

Measures

	Units Complete	RR	HPI	
Current Goal:				
Goal at Completion:				
Current actual:				
Estimate at Complete:				
Variance:				

Other Measures