



**Monthly Project Report (MPR)  
Documentation for Project Leads**

**Updated December 2019**

## Monthly Project Report (MPR) Documentation for Project Leads

### I. General Instructions

A monthly project report (MPR) is required for all projects, with few exceptions, such as small developmental initiatives with quick turn-around time. Please consult with your Senior Project Advisor (SPA) or unit lead if you have questions about whether or not you need to complete an MPR for your project/initiative.

The MPR has two sections – **Project Details**, which may not change in the course of the project, and **Monthly Details**, which are updated each month. Required fields are identified with ‘\*’.

- Projects should start the MPR as soon as work has started on the project.
- The yearly schedule of monthly due dates is published at the start of the year. Due dates are typically the last Thursday of each month and you will receive a reminder.
- For technical initiatives and international projects, the following should minimally be completed: project detail, monthly cost projections, monthly updates, special issues.
- Only the current month update should be included each month; past month(s) detail will always be available in the archive folder in the MPR system.
- Please use the suggested indicators for variance (+/-) to clearly show overruns or underruns.
- KEY: Use the Status Indicator button to indicate level of risk for your project. This serves as a quick notice to the SRO Admin Team of potential issues that may need special attention. Of course, you will provide details regarding those issues in the Special Issues section.
- When completing the monthly MPR, please do a quick review of overall ‘Project Details’ to see if any edits are required. For example, changes to project team membership.

Please see instructions for completing the MPR below. Note that the screenshots are numbered (SS1, SS2, etc.) for ease of reference.

## II. Completing the MPR

The login page for MPR Administration can be found on the SRO Intranet under 'Project Management' or via this link:

<https://srowebapps.isr.umich.edu/MPRAdmin/LogOn.aspx>

Use ISR domain credentials to access the website. If you try with a specific user account with a wrong password three times, the user account will be locked out for 20 minutes.

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*Production*



MPR Administration

USER NAME

PASSWORD

LOG-IN

SRO Survey Research Operations

Session Time is increased to 50 minutes.  
Last Updated October 28, 2019

The user can enter data in various areas in the system. To save any data, you must press the **"Save Update" button**. Once you log on to the system, the session will be timed out within 50 minutes if there is no activity/clicking in the system. The session time will be extended when you click any button or menu in the system. **Please do not use the browser buttons to navigate in the system.**

## Current Project List

The default page after logon is the Current Project List.

The default list is sorted alphabetical by Project Acronym. Click on any of the project headers to sort the list either ascending or descending.

SS1

**Current Projects Dashboard as of 09/30/2019 (27 in total)**  
**Sort by Proj Acronym ASC**  
[Add New Project](#)

PROJECT	OFFICIAL NAME	FILES	PROJECT TYPE	PRIMARY MODE	PROJECT START/END	DC START/END	PROJECT LEAD	TOTAL BUDGET	CURRENT PHASE	IND STATUS	STAFF NOTES
ACL6	Americans' Changing Lives - Wave 6	1	Sponsored	Tel	09/2018 09/2019	04/2018 08/2019	Terri Ann Ridenour	\$722,153.00	Implementing		
AFHS	American Family Health Study	2	Sponsored	Web	01/2019 10/2021	09/2019 03/2021	Rebecca Gatward	\$2,490,133.00	Planning		
A-STARRS LS	Army Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study	38	Sponsored	Web	02/2015 11/2019	10/2015 11/2019	Meredith A House	\$12,834,699.00	Implementing		
BFY	Baby's First Years		Sponsored	FtF	10/2017 12/2020	04/2018 12/2020	Piotr Dworak	\$5,528,696.00	Implementing		
C.A.R.E.	Concussion Assessment, Research and Education (CARE) Consortium	4	Sponsored	Tel	12/2018 09/2020	02/2019 06/2020	Donnalee Ann Grey-Farquharson	\$1,034,833.00	Implementing		
CAMS 2019	HRS 2019 Consumption and Activity Mail Study	1	Sponsored	Mail	05/2019 05/2020	09/2019 04/2020	Anna Fuqua-Smith	\$411,653.00	Initiation		
CDS-19	PSID Child Development Supplement V (2019)		Sponsored	FtF	09/2018 08/2020	09/2019 05/2020	Rachel Anne Orłowski	\$8,965,959.00	Planning		
ECHO	Environmental Influences on Child Health Outcomes	8	Sponsored	FtF	01/2017 12/2020	05/2018 12/2020	Terri Ann Ridenour	\$459,169.00	Implementing		
EDCPE	Every Dollar Counts Program Evaluation	1	Sponsored	FtF	04/2018 02/2020	03/2019 11/2019	Karin Schneider	\$1,963,818.00	Implementing		
ED-Stars Continuation	Emergency Department Study to Assess Risk of Suicide - Continuation Project	5	Sponsored	Tel	01/2018 12/2020	01/2019 09/2019	Maureen Joan O'Brien	\$529,284.00	Implementing		

To access the project details for a project already listed, click on the project name. To add a new project to the list, click on the "Add New Project" button at the top of the screen.

To access the most recent monthly details, press the icon in the "IND STATUS" (Indicator Status) column.

To access the Staff Notes module, press the icon in the "STAFF NOTES" column. The "Staff Notes" column shows if there are any staff notes entered for the project. If yes, you will see a square icon. If there is no staff note, you see a circle icon. (See details in text for SS8 below.)

Roll your mouse over the Project Official name column to see a glimpse of the Project Description of the project. Roll your mouse over the Indicator Status icon, to see a glimpse of the Monthly Updates for the most recent month of the project.

The number in the “Files” column shows the total number of files that have been uploaded for the project. (See details in text for SS5 below.)

### Project Details Page

To enter or update information use the Project Details edit page (Edit Mode). Please see SS2 – SS4 below, using the example from a current project, ACL6.

### SS2

<a href="#">Go to Project List</a> <a href="#">Go to File Upload</a> <a href="#">Go to Monthly Data</a> <a href="#">Enter Staff Notes</a>			
<a href="#">Save Updates</a> <a href="#">Delete Project</a> <a href="#">Add New Project</a>			
Basic			
Acronym*	ACL6		Other Names
			"Racial inequalities in health throughout adulthood: The cumulative impact of
Name*	Americans' Changing Lives - Wave 6		
Status & Type*	Project Status	Current ▼	Project Type
			Sponsored Projects ▼
Mode	Primary Mode	Telephone ▼	Secondary Mode
			Face to Face ▼
	# of Modes	2 ▼	
Proposal#	1. SRO #18-002R01	2.	3.
			4.
			5.
IRB	IRB HUM#	HUM00153243	
	IRB Period Of Approval	Pending	
Desc*	Led by Dr. Maggie Hicken, ACL6 will build on 5 waves (25 years) of data from the nationally-representative Americans' Changing Lives (ACL) study by adding a 6th wave of data collection (ACL6), along with blood collection for DNA methylation analysis. With ACL6, there will be data for over 30 years of neighborhood chemical and non-chemical stressors experienced cumulatively over adulthood, which the investigators will link to DNA methylation and then examine the impact on healthy aging. The objective of ACL6 is to identify underlying epigenomic mechanisms linking racial residential segregation to key markers of healthy aging, for which there are known inequalities.		
Team			
Project Lead*	Terri Ann Ridenour ▼		Budget Analyst
			Grace Tison ▼
Production Manager	Lisa J Carn ▼		Senior Project Advisor
			Shonda R Kruger-Ndiaye ▼
Proj/Prod Manager	▼		Proj/Prod Manager
			James Koopman ▼
Total DC Staff	21		Type DC Staff
			SSL ▼
Project Team	Shonda Kruger-Ndiaye: SPA Terri Ridenour: SRO Lead/Project Manager Jaime Koopman: SSI (Blaise/STrak Specs) Gary Hein: SSI (Weblog Specs)		
Security	Security Plan In Place (Sensitive Data Mgmt Plan) NA ▼		

SS3

Schedule					
Project*	Begin Year	2018 ▼	Month	09 ▼	End Year
Data Collection	Begin Year	2018 ▼	Month	04 ▼	End Year
				2019 ▼	Month
				08 ▼	
Budget & Funding					
Budget & Cost*	Direct Budget	\$462,919.00	Indirect Budget	\$259,234.00	Total Budget
					\$722,153.00
PI	Name	Organization			
	1.	Margaret Hicken	University of Michigan, SRC - SEH		
	2.				
	3.				
Funding Agency	National Institutes of Health, National Institute on Aging				
Hardware, Software & Tools					
Hardware					
<input type="checkbox"/> Laptop <input checked="" type="checkbox"/> Desktop <input type="checkbox"/> Tablet <input type="checkbox"/> [UM cell] Phone <input type="checkbox"/> Paper and Pencil <input type="checkbox"/> Other <input type="text"/>					
Sample Management			Data Collection		
<input checked="" type="checkbox"/> SurveyTrak <input type="checkbox"/> SMS <input type="checkbox"/> Web SMS <input type="checkbox"/> Illume <input type="checkbox"/> MSMS <input type="checkbox"/> Project specific system <input type="text"/> <input type="checkbox"/> Other <input type="text"/>			<input checked="" type="checkbox"/> Blaise 4.8 <input type="checkbox"/> Blaise 5 <input type="checkbox"/> Blaise IS <input type="checkbox"/> Illume <input type="checkbox"/> SAQ <input type="checkbox"/> Other <input type="text"/>		
Data Entry			OC Recording Method		

SS4

Payment		Administration	
<input checked="" type="checkbox"/> Yes, R <input type="checkbox"/> Yes, INF <input type="checkbox"/> Yes, Other <input type="text"/> <input type="checkbox"/> Not used		<input checked="" type="checkbox"/> SRO Group <input type="checkbox"/> ISR Group <input type="text"/> <input type="checkbox"/> UM Group <input type="text"/> <input type="checkbox"/> Other <input type="text"/> <input type="checkbox"/> N/A	
Payment Type		Payment Method	
<input checked="" type="checkbox"/> Check, prepaid Amount <input type="text"/> \$30 (interview) <input type="checkbox"/> Check, post Amount <input type="text"/> <input type="checkbox"/> Cash, prepaid Amount <input type="text"/> <input type="checkbox"/> Cash, post Amount <input type="text"/> <input checked="" type="checkbox"/> Other <input type="text"/> Check, prepaid - \$50 (consent to WBD/m: Amount <input type="text"/> <input type="checkbox"/> N/A		<input type="checkbox"/> Check through STRak RPay System <input type="checkbox"/> Check through other system <input type="text"/> <input type="checkbox"/> Interviewer payment of cash (reimbursed/reconciled via Tenrox) <input type="checkbox"/> Imprest Cash Fund from ISR Business Office <input type="checkbox"/> Other <input type="text"/> <input type="checkbox"/> N/A	
File Upload			
File Upload	Title	Document Type	File Name
Click the File Name to download	Project Review Doc	Project Review Document	ACL 20190607_ProjectManagementReview_702.pdf
			Uploaded By
			Ann Vernier

Remember to always click on "Save Updates" (for edited information) or "Save New Project" (if entering information for a new project) to save any data that you enter.

Project leads will need to edit information on the Project Details screen if/when project information changes. Most common fields that will need updating are:

- Project Status
- Project Team information
- Budget information

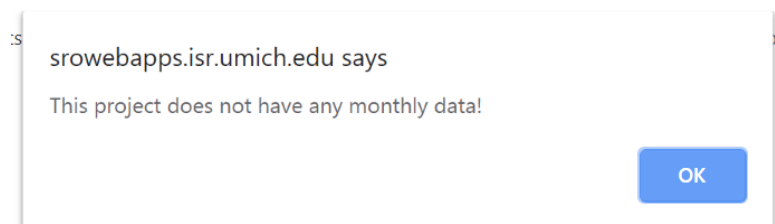
The "Project Status & Type" field has four possible values: Pending, Upcoming, Current, and Archived. Projects will generally start out as Pending or Upcoming, depending on when data for the project is first entered into the MPR system. *Pending* projects are generally not yet funded, but have a high probability of being funded. A project would be moved to *Upcoming* when the project has been funded and initial work on the charter and setting up of accounts has started. Once the kickoff meeting has taken place and work has begun, the project status should be changed to *Current*. It will remain in this status until work is completed. When work is completed, the status should be changed to *Archived*. Projects where work is completed, but final reports are still being processed, can be moved to Archived status. **Upcoming and Current projects require an update each month.** Pending and Archived projects do not. To change the status, click on the down arrow in the "Project Status" box (third line of the screen) and select the appropriate status.

If there is a change in the composition of the project team, this information should be updated on the Project Details page. To change team information, simply type over existing information.

If the project budget changes during the course of the project, you will need to change this information on the Project Details page. The information that is entered here is what will be displayed as the budget information on the Monthly Details page. To change budget information, just type over existing information.

As with any changes in this system, remember to "Save Updates" when done.

Once you have saved the project (or changes), click on "Go to Monthly Data" to go to the Monthly Details Edit page. If there is no Monthly data yet, you will get a message (see below) "This project does not have any monthly data!", and then you will get to the monthly update page in Add New Month.



## Project File Upload Module



The MPR system is equipped to store uploaded files. SRO requests uploads of key documents, including the project charter, all project review materials, and, if available, the project security plan, i.e. a sensitive data management plan.

At the bottom of the Project Details update page, you see the File Upload module. Please see the template below (SS5).

To upload a file, select “Choose File” and then enter document name, specify type of file to be uploaded. You access the file through your browser.

After the file is uploaded, you can click the File Name to access the uploaded file or delete the file.

SS5

File Upload Maintenance for Project ACL6					
<a href="#">Current Project List</a>		<a href="#">Go to Project Detail</a>		<a href="#">Go to Project Monthly Detail</a>	
List of Uploaded Files (click File Name to download)					
Type	File Name	Document Name	Document Type	File Type	Delete
	ACL 20190607_ProjectManagementReview_702.pdf	Project Review Doc	Project Review Document	PDF	
:: Click the File name to download the file ::					
<b>Upload File</b> <b>Please upload files no more than 8 MB</b> allow file types: PDF, TXT, XLS, XLT, XLSX, DOC, DOCX, DOCM, PPS, PPT, GIF, JPG					
Select File	<input type="button" value="Choose File"/> No file chosen				
Document Name/Title	<input type="text"/>				
Document Type	<input type="text"/>				
<input type="button" value="Press to Upload File"/>					

## Monthly Details Page

Please see SS6 & SS7 below.



SS6

Edit Monthly Details for ACL6					
ACL6 Monthly Data 09/2019 - Implementing ▼					
<a href="#">Go to Project List</a> <a href="#">Go to File Upload</a> <a href="#">Go to Project Detail</a> <a href="#">Enter Staff Notes</a>					
<a href="#">Save Updates</a> <a href="#">Delete this Monthly Updates</a> <a href="#">Add New Month</a>					
<b>🚩 You are currently at the monthly updates for Sep, 2019! Press "Add New Month" button to add any new monthly updates!!</b>					
Report Period*	Year	2019 ▼	Month	09 ▼	Project Phase
				Implementing ▼	
Cost*	Total Cost to Date (Direct+Indirect)		\$728,598.87		Cost Report Date
					09/18/2019
					(mm/dd/yyyy)
	Estimates cost at completion (EAC)		\$795,879.29		Total Budget
				\$722,153.00	
(Target=zero/positive variance)	Variance (Total Budget minus EAC)		\$-73,726.29		(Negative entry please use -9 or -9 format!)
	Reason For Variance		Please see Monthly Updates.		
Projections*	Dollars Projected For Month		\$125,295.65		Actual Dollars Used
					\$127,354.82
(Target=zero/positive variance)	Variance (Projected minus Actual)		\$-2,059.17		(Negative entry please use -9 or -9 format!)
	Reason For Variance				
Monthly Updates*	<p>On 9/19/19 the following message was sent to the PI (Maggie Hicken) and her Grants/Finance Manager (Nick Prieur).</p> <p>We finished the current data collection period on 9/14/19. There were 726 ACL6 interviews completed, reflecting a 54% response rate. The average length of the interview was 78 minutes. There were 409 Rs (58%) consented to the Home Visit, with 35 cases still undecided. Attached is the latest progress report with further details.</p> <p>Also attached is the SRO August cost report. It provides a summary of budget, actual costs through August, future projections (Sept/Oct), and total, projected cost to complete. The total, direct budget is \$462,919. \$467,050 has been spent through</p>				
Special Issues					

SS7

Project Team Member Notes for this month					
Milestone Dates (mm/dd/yyyy)	Pre-Production Start		Pretest Start		Pretest End
	Recruitment Start	02/25/2019	Staffing Completed		GIT Start
	SS Train Start	04/02/2019	SS Train End	04/03/2019	DC Start
	DC End	09/14/2019			
<b>Measures</b>					
Units Completed (Target=zero/negative variance)	Current Goal	1,058 (1,526 sample)	Goal at Completion		
	Current Actual	729	(Estimate) # at Complete (E#AC)		
			Variance		
RR (Target=zero/negative variance)	Current Goal	80%	Goal at completion		
	Current Actual	54%	(Estimate) RR at Completion (ErrAC)		
			Variance		
HPI (Target=zero/positive variance)	Current Goal	5	Goal at Completion		
	Current Actual	6.7	(Estimate) HPI at Completion (EhpiAC)		
			Variance		
Other Measures	Home Visit Consent				
	Goal at Completion: 700				
Status Indicator**	<input type="radio"/> On Track <input checked="" type="radio"/> Some Concerns <input type="radio"/> Special Attention Needed				

**The default display on this screen is the last month updated for this project.** To add a new month, click on "Add New Month" to bring up a screen to enter the monthly report information. You will see the button "Populate with Last Month's Data" on the top. It will fill some text boxes with information from last month's update. However, please be sure to press the "Save New Monthly Updates" button to save the data.

AHRB Monthly Data	
Go to Project List	Go to File Upload
Go to Project Detail	Enter Staff Notes
Save New Monthly Updates	Populate with Last Month's data

Please pay careful attention to the Project Phase field. This will default to "Initiation" when adding new monthly information. You will need to change this to the appropriate phase for the project. **Note that projects in Archived status should only have Closing or Final as their project phase.** You should only use Final when all reports have been done and submitted and final cost reports have been run.

At the bottom you see Status Indicator to indicate your assessment of current risk to the project. Not to be confused with the 'Status & Type' project status on the Project Details page, which refers to project phase (see SS2).

## Staff Notes Edit

All project managers have manager access or Admin access to MPR. Besides Manager and Admin access, we also have “Staff Notes” access for other SRO Units (like TSG). Staff working on the project can enter Staff Notes to document issues or concerns.

SS8

	Services				
251	SRO Technical Services	Marsha Skoman	08/2007	Continued bug fixing with FPR programming, programmed some web logging enhancements. ...	10/12/2007 1:34:59 PM
258	SRO Technical Services	Marsha Skoman	09/2007	Continued bug fixing and investigation problems with the CATI FPR. Programmed a Send Web Link feature in Web Logging. Attended meetings....	10/12/2007 4:47:12 PM
284	SRO Technical Services	Marsha Skoman	10/2007	Attended meetings, made some web logging enhancements. ...	12/7/2007 1:15:46 PM
285	SRO Technical Services	Marsha Skoman	11/2007	Attended meetings, responded to questions regarding web logging, programmed some web logging enhancements. ...	12/7/2007 1:16:41 PM
333	SRO Technical Services	Marsha Skoman	12/2007	Attended meetings, programmed some web logging changes, and programmed changes to the FPR for Final NIO. ...	1/14/2008 11:44:21 AM

Internal ID	0
Group	<input type="text" value=""/>
By	<input type="text" value=""/>
For Report Period	Year <input type="text" value="2019"/> Month <input type="text" value="10"/>
staffnotes Contents	<div style="border: 1px solid black; height: 100px;"></div>

## Report Query

Please see SS9 below. If you click “Report Query” from the menu, you will see a grid view of projects with monthly update indicator icon/ball. If the project has the monthly update data, you will see the indicator status icon. The empty square box in the cell shows when there is no monthly update for that month.

If you click any of the status indicator lights, you will go to the Monthly Details Edit page for that month. If you click on any of the square boxes, you will go to the Monthly Details Update page to “Add New Month” with that specific month selected. NOTE: The Cost Report Date will be defaulted to the previous month.



























































































































































Also, if you click on the project acronym, it will take you to the Project Details Edit page.

### Projects Report Query/Monthly Update Quick Reference

Select Calendar Year 2019 ▼

Click the month to pull up Project Monthly report for the month for that project type.

Click the Project Name to pull up Project Monthly Archive Report for the Project. 

NonArchived Sponsored Projects													
Project	Type	Status	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
ACL6	Sponsored	Current											
AFHS	Sponsored	Current											
A-STARRS LS	Sponsored	Current											
BFY	Sponsored	Current											
C.A.R.E.	Sponsored	Current											
CAMS 2019	Sponsored	Current											
CDS-19	Sponsored	Current											
Child First	Sponsored	Current											
ECHO	Sponsored	Current											
EDCPE	Sponsored	Current											
ED-Stars Continuation	Sponsored	Current											
H&WB	Sponsored	Current											
HCDC, H&C	Sponsored	Current											
HRS - LHMS 2019	Sponsored	Current											

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