

Quarterly Research Program Progress Reporting Guidelines

How to create, update,
and submit a Quarterly
Progress Report on the
Research Project
Management Database



Reporting Periods

The Division of Research, Innovation, and System Information (DRISI),

Research Quarterly Progress Reporting Periods

<u>Fiscal Year Quarter</u>	<u>Fiscal Year Quarter Begin – End Dates</u>	<u>Task Managers Create the RPMD Quarterly Report</u>	<u>Office Chiefs Research Progress Report² Meeting</u>
1 st Quarter	July 1 st – September 30 th	November 1 st – 7 th	Week of December 1 st
2 nd Quarter	October 1 st – December 31 st	February 1 st – 7 th	Week of February 28 th
3 rd Quarter	January 1 st – March 31 st	May 1 st – 7 th	Week of May 29 th
4 th Quarter	April 1 st – June 30 th	August 1 st – 7 th	Week of August 28 th



RPMD – Quarterly Report Details

1.) Complete the nine fields highlighted in yellow and the four fields highlighted in green below with the task's current Fiscal Year (FY) quarter information as per the detailed instruction to follow.

FileMaker Pro - [Research Project Management Database (RPMD_Server)]

File Edit View Help

Main Menu

RPMD - Quarterly Report Details

Quarterly Report Details

TASK NO.	TASK TITLE	TASK DESCRIPTION
1132	Development of Maintenance Decision Support System (MDSS); Pooled Fund TPF-5(054)	This task will develop an Automated Maintenance Decision Support System (MDSS). The MDSS will do the following things: assess current road and weather conditions; provide time and location specific weather forecasts along transportation routes; predict how road conditions will change due to forecast weather; suggest associated application rates of several candidate road maintenance treatments; notify state agencies of approaching conditions and suggest optimal maintenance treatments; and evaluate the reliability of predictions and the effectiveness of applied maintenance treatments for

FISCAL YEAR: [] QUARTER NO.: [] TASK COMPLETE %: [] ON TIME?: [] ON BUDGET?: [] ON SCOPE?: []

POOLED FUND: POOLED LEAD STATE: SD AWP STATUS: Completed

IF ANSWER TO ANY OF THE ABOVE IS NO, PLEASE EXPLAIN: []

THIS QUARTERS ACCOMPLISHMENTS: [] NEXT QUARTER'S TASKS, DELIVERABLES AND DUE DATES: []

EXPENDITURES	INVOICED	DRI INTERNAL COSTS				TOTAL AMT	% EXPENDED TO DATE
	CONTRACT \$	EQUIPMENT	MATERIALS	TRAVEL	DRI PYs		
THIS QUARTER	[]	[]	[]	[]	[]	6,012.03	6,012.03
THIS FY	[]	[]	[]	[]	[]	6,012.03	4.01
TOTAL TASK	150,000.00	[]	[]	[]	[]	50,374.26	133.58

Calculate Totals

SUBMITTED BY: Baumeister, Larry PHONE NO.: (916) 324-2296 LAST MODIFIED DATE: 8/16/2012

Print Preview View Task Details



Quarter's Accomplishments



The Quarter's Accomplishments section should convey a general attitude about task status.

- Are you confident of completion or concerned about problems that have arisen?
- Be honest in your assessment of the situation.
- It's extremely important that the reviewers of your task can get an overall impression of the progress in a short amount of time.

A screenshot of a software interface. At the top, there is a header "THIS QUARTERS ACCOMPLISHMENTS" in bold black text. Below the header is a large yellow rectangular area, likely a text input field. At the bottom of the interface, there is a table with two columns: "EXPENDITURES" and "INVOICED". The "INVOICED" column has a grey button-like appearance.

Quarter's Accomplishments, cont.

Task Status Overview

- The specific task objectives for the quarter
- The task deliverables for the quarter

Progress

- What has been done toward each objective
- Whether the objectives were or were not reached
- One or two "main achievements" from previous reporting period:
 - Provide details



The screenshot shows a software interface with a title bar that reads "THIS QUARTERS ACCOMPLISHMENTS". Below the title bar is a large yellow rectangular area, likely a placeholder for content or a warning message. At the bottom of the interface, there is a section labeled "EXPENDITURES" with a sub-section labeled "INVOICED" highlighted in a grey box.

Expenditures

2. Complete “On Time,” “On Budget,” and “On Scope” details.

Rate of overall concrete road maintenance treatments, noting any approaching conditions and suggest optimal maintenance treatment reliability of predictions and the effectiveness of applied maintenance

FISCAL YEAR	QUARTER NO.	TASK COMPLETE %	ON TIME?	ON BUDGET?	ON SCOPE?
<input type="text"/>					

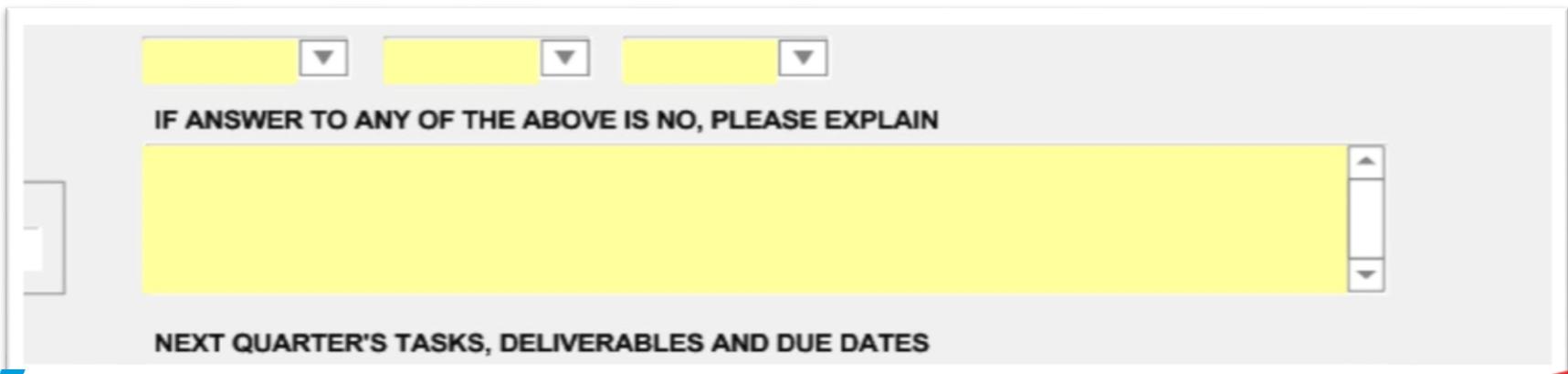
IF ANSWER TO ANY OF THE ABOVE IS NO, PLEASE EXPLAIN

Deviations and Budget Details

If the task status overview lists problems/challenges, here you provide details of these problems/challenges (either the obstacles in the previous period, the foreseen obstacles in the next period, or both). Also detail your planned contingency actions.

If no to on “On Time”

- Provide details about any deviations from the original work timeline
- Explain why these deviations were made or what happened
- Explain how these deviations effect(s) the task/project
- Provide details of your planned solution
- Also note any planned future deviations and possible solutions

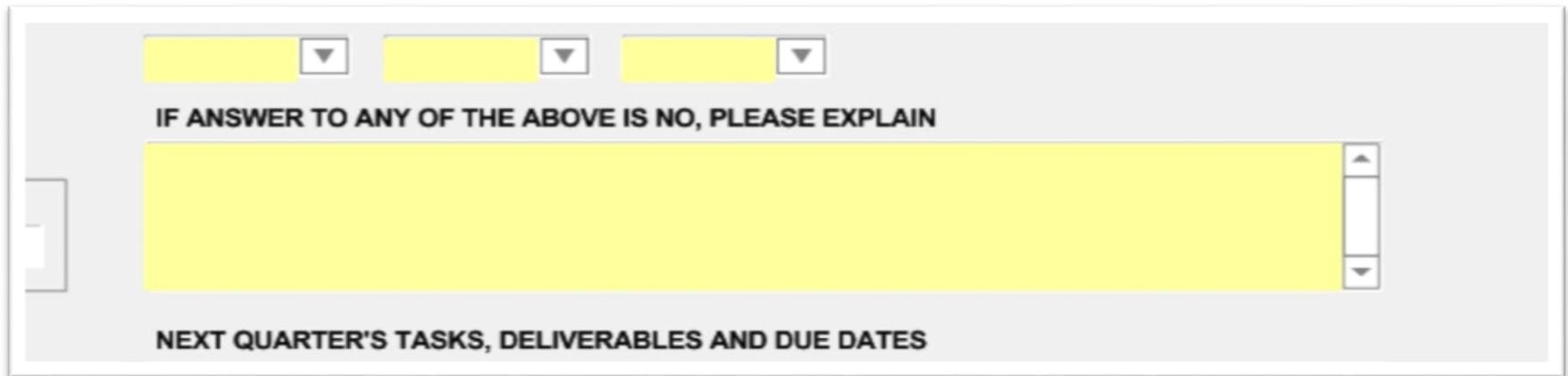


The screenshot shows a form interface with a light gray background. At the top, there are three yellow rectangular boxes, each followed by a small downward-pointing arrow icon. Below these boxes, the text reads: "IF ANSWER TO ANY OF THE ABOVE IS NO, PLEASE EXPLAIN". Underneath this text is a large, empty yellow rectangular area with a vertical scrollbar on the right side, indicating it is a text input field. At the bottom of the form, the text reads: "NEXT QUARTER'S TASKS, DELIVERABLES AND DUE DATES".

Deviations and Budget Details, cont.

If no on “On Budget”

- Provide details of overages
- Explain why
- Explain effect(s) on the task/project
- Provide details of your planned solution
- Also note any foreseen budget overages and possible solutions

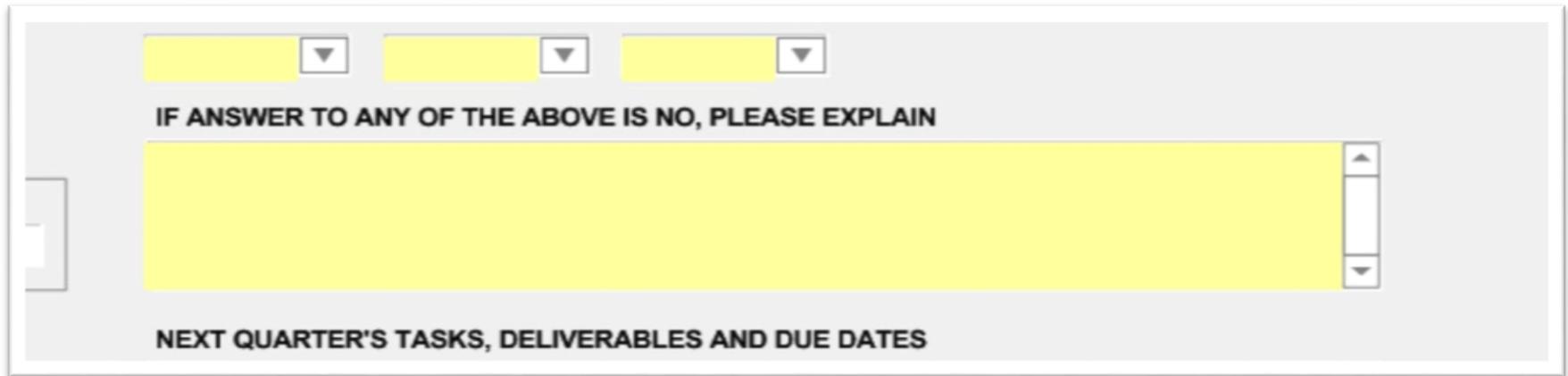


The screenshot shows a web form with a light gray background. At the top, there are three yellow rectangular input fields, each followed by a small downward-pointing arrow icon. Below these fields, the text "IF ANSWER TO ANY OF THE ABOVE IS NO, PLEASE EXPLAIN" is displayed in a bold, black, sans-serif font. Underneath this text is a large, empty yellow rectangular text area with a vertical scrollbar on its right side. At the bottom of the form, the text "NEXT QUARTER'S TASKS, DELIVERABLES AND DUE DATES" is displayed in a bold, black, sans-serif font.

Deviations and Budget Details, cont.

If no on “On Scope”

- Provide details about any deviations from the original scope
- Explain why these deviations were made or what happened
- Explain how these deviations effect(s) the task/project
- Provide details of your planned solution
- Also note any planned future deviations and possible solutions



The screenshot shows a form interface with a light gray background. At the top, there are three yellow rectangular boxes, each with a small downward-pointing arrow icon to its right. Below these boxes, the text "IF ANSWER TO ANY OF THE ABOVE IS NO, PLEASE EXPLAIN" is displayed in a bold, black, sans-serif font. Underneath this text is a large, empty yellow rectangular area with a vertical scrollbar on its right side, indicating it is a text input field. At the bottom of the form, the text "NEXT QUARTER'S TASKS, DELIVERABLES AND DUE DATES" is displayed in a bold, black, sans-serif font.

