

2025-05-13

# Utilizing Microsoft 365 at SNOLAB to Communicate Monthly Status Updates with the Project Oversight Group

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# Outline

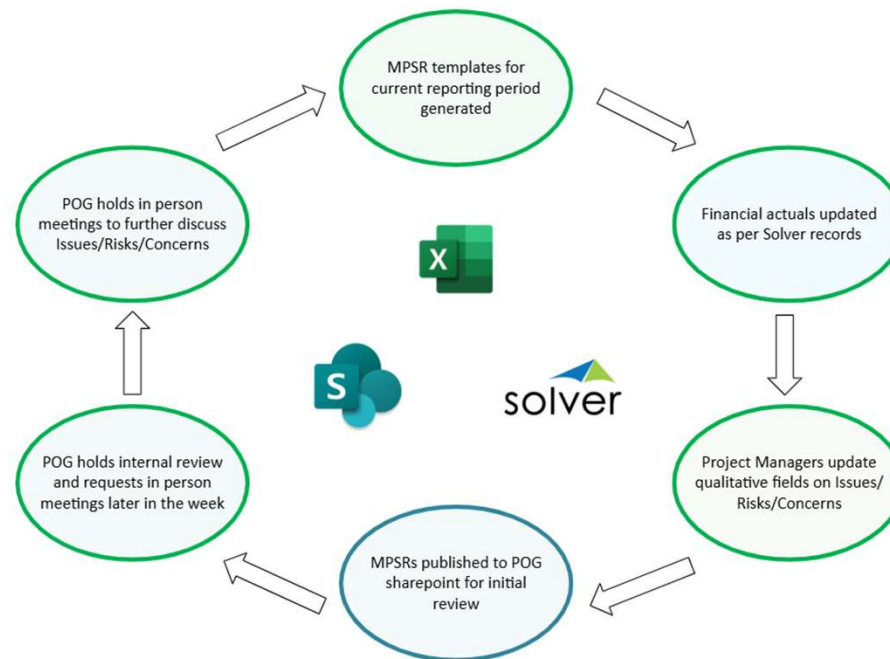


- Problem Statement
- Optimizing Sharepoint
- Optimizing Excel
- Utilizing PowerBI
- Conclusion

# Problem Statement



- With a growing portfolio of projects, the existing method of producing/reviewing Monthly Project Status Reports (MPSR) reviews became unwieldy.



# Optimizing Sharepoint



- Creation of a centralized Sharepoint for all MPSRs to be updated
  - Each project is to have its own folder created
    - Folder permissions are maintained at the Project level folder. This allows it so that Project Managers/Leads to not see the noise of all projects listed
  - Creates a central location for Project Management related documents to be housed for easy access by the Project Oversight Group
  - Creates a folder structure to isolate each fiscal year's MPSRs
  - Standardized naming format to utilize as meta-data

Documents > POG Project Records > 2024-29 MSI

Name

P1806A SCDMS

P1902 nEXO

P2006 DEAP - 3600 Upgrades

P2007 CTBT

P2011A Surface Cryostat

P2101A PICO 500

1 - Project Agreements

2 - MPSRs

3 - Project Forms

Documents > POG Project Records > 2024-29 MSI > P1806A SCDMS

Name

FY24

FY25

FY26

P1806 - SuperCDMS MPSR - P00 - APR 2024 - FY25 Forecast Baseline.xlsx

April 26, 2024

P1806 - SuperCDMS MPSR - P01 - MAY 2024.xlsx

May 27, 2024

P1806 - SuperCDMS MPSR - P02 - JUNE 2024.xlsx

August 15, 2024

P1806 - SuperCDMS MPSR - P03 - JULY 2024.xlsx

October 10, 2024

P1806 - SuperCDMS MPSR - P04 - AUGUST 2024.xlsx

August 27, 2024

Documents > POG Project Records > 2024-29 MSI > P1806A SCDMS > 2 - MPSRs

Documents > POG Project Records > 2024-29 MSI > P1806A SCDMS > 2 - MPSRs > FY25

# Optimizing Excel

- Utilization of named fields



Objectives : X ✓ fx ✓ Last 30 Days  
Accomplishments (recent progress, what did we do?)

A) General Project Information					
Project Name:	001-SuperCDMS GW3 Deliverables	Project Manager:		Fiscal Year (YYYY-YY)	FY2024-25
POG #:	2018-06B	Fiscal Year SPI	1.00		
Status Report Month:	Aug	Current Annual Budget	\$39.2k		
Financial Period Ending:	Jul	Project Lifecycle Estimate	\$1,032.6k	Project Status	Active

B) Monthly Status Reporting		
Last 30 Days Accomplishments (recent progress, what did we do?)	Next 30 Days Objectives (short range upcoming plans, goals and/or targets)	Next 90 Days Objectives (medium range plans, goals, and/or targets)
<ul style="list-style-type: none"><li>- etching &amp; passivation of OVC complete</li><li>-OVC top &amp; bottom shipped underground, leak tested on seismic platform</li><li>-Alignment survey initiated for clocking OVC within shield</li><li>-Added PMO resources to support increase in installation activities</li><li>-Shipment from SLAC with inner cans arrived Aug 26</li><li>-Procurement of ice tanks initiated by collaboration</li></ul>	<ul style="list-style-type: none"><li>-Dilution fridge mounting on seismic platform</li><li>-next etching &amp; passivation campaign (inner cans + copper parts)</li><li>-IRR planning (LN2 cold trap + 4K cold trap)</li><li>-Define resource requirements for Technical Services, transition to 4-week look ahead on work requests to support TS planning.</li></ul>	<ul style="list-style-type: none"><li>- Shipping inner cans u/g, nest inner cans</li><li>-Continue etching &amp; passivation of remaining copper components</li><li>-Install C-stem and 6-way cross</li><li>-Installation of E-tank frame on seismic platform</li><li>-move items from LU storage to u/g, continue installation</li><li>-begin installation of E-tank</li></ul>

# Utilizing PowerBI – Query Editor



SharePoint.Files("https://snolab.sharepoint.com/sites/POG-Team-POGProjectRecords", [ApiVersion = 15])

Queries [47]

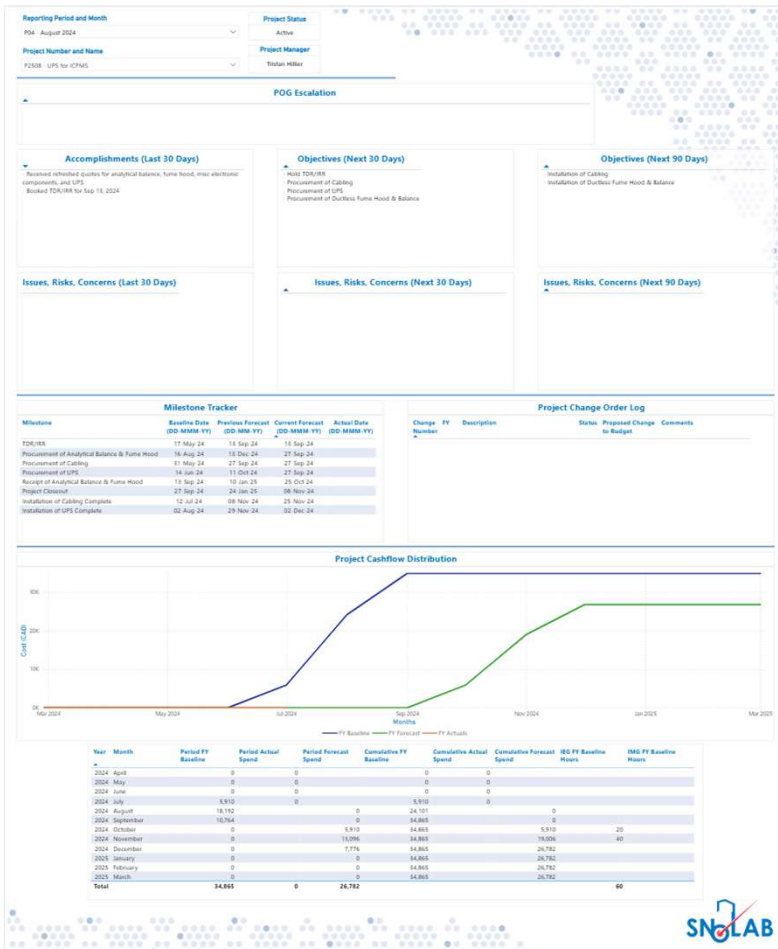
- Transform File from Issues/Risks/Concerns [2]
- Transform File from Accomplishments/Planning [2]
- Transform File from POG Escalation [2]
- Transform File from 2024-29 MSI [2]
- Transform File from Schedule Dates [2]
- Transform File from Change Order Log [2]
- Commentary Backups [3]
  - Issues/Risks/Concerns
  - Accomplishments/Planning
  - POG Escalation
- Misc
- Transform File from Project Status [2]
- Transform File from Project Manager [2]
- Other Queries [12]
  - 2024-29 MSI
  - Commentary
  - Project Number and Name (FY24)
  - Schedule Dates
  - Change Order Log
  - Month Sort Order 2
  - Period Table
  - Project Status
  - Project Status Sort Order
  - Schedule Dates for Previous Period
  - Project Manager
  - Reporting Period

APPLIED STEPS

- Source \*
- Filtered for Funding Period \*
- Filtered for MPSRs \*
- Filtered for FY26 \*
- {1} \*
- Filtered Hidden Files1 \*
- Filtered Hidden Files2 \*
- Invoke Custom Function1 \*
- Renamed Columns1 \*
- Added FY Column \*
- Removed Excess Columns \*
- Expanded Table Columns \*
- Changed Type 1 \*
- Sorted Source.Name \*
- {2} \*
- Added Reporting Period \*
- Added Project Number and N... \*
- Added Project Number \*
- Merged with Period Table \*
- Expanded Period Table \*
- Added Cumulative Forecast \*
- Removed Nulls \*
- Added FY Baseline \*
- Changed Type 2 \*
- Merged with Project Status \*
- Expanded Project Status \*
- Merged with Project Manager \*
- Expanded Project Manager \*
- X Added Graph Actuals \*
- Added Graph Forecast \*

- Direct connection to Sharepoint archive
- Well labeled Queries so you can you can more easily navigate
- Well labeled Applied Steps so people can more easily update the Query Editor

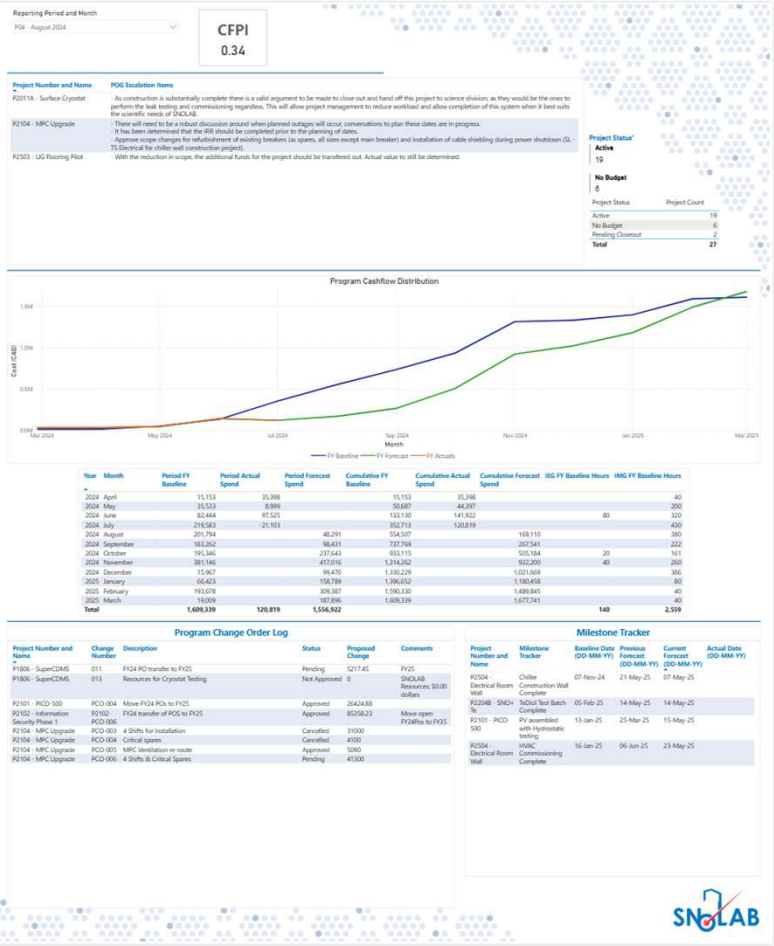
# Utilizing PowerBI – Project Overview



- Summarizes information from excel template
- Capability to select any existing reporting period
- Capability to select any existing project
- Summarizes financial information in graphical representation
- Summarizes financial information in both period and cumulative



# Utilizing PowerBI – Program Overview

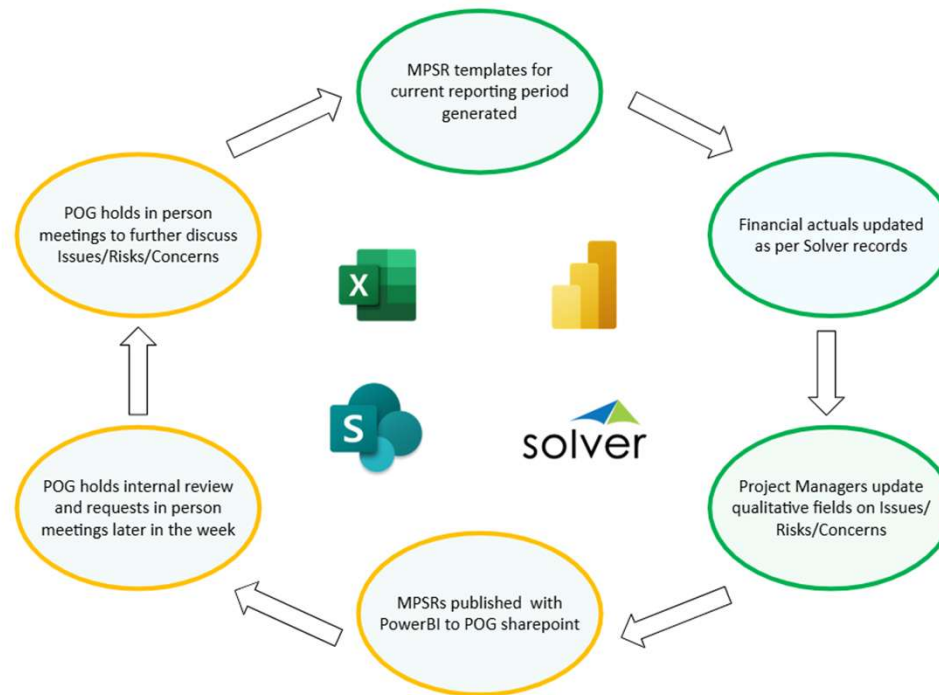


- Summarizes information for all projects from excel templates
- Capability to select any existing reporting period
- Highlights all projects with escalation items
- Summarizes financial information in graphical representation
- Summarizes financial information in both period and cumulative
- Highlights milestones for all projects due in next 30 days



# Conclusion

- Although the process flow has stayed the same leveraging PowerBI has been able to both streamline steps and provide an easier to use reporting tool with added functionality.



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# Questions ?

 @SNOLABscience