

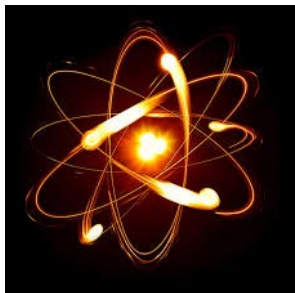


BIP Capstone Project

Trey Viramontes
May Intern Project
May 22, 2024

Personal Background

- Education
 - Graduated in 2021 with Bachelor's in Physics
 - Currently in my final year of Master's program for degree in Business analytics
- Hobbies
 - Coaching baseball for a full-time travel program in Shorewood



Introduction to Fermilab

- New Programs
 - OBIEE
 - Assisting in closing and canceling the balance on purchase orders
 - PowerAutomate
 - Automation of list population, email notifications, form submissions, etc.
 - PowerBI
 - Building metrics and dashboards for data gathered from different processes built within compliance department

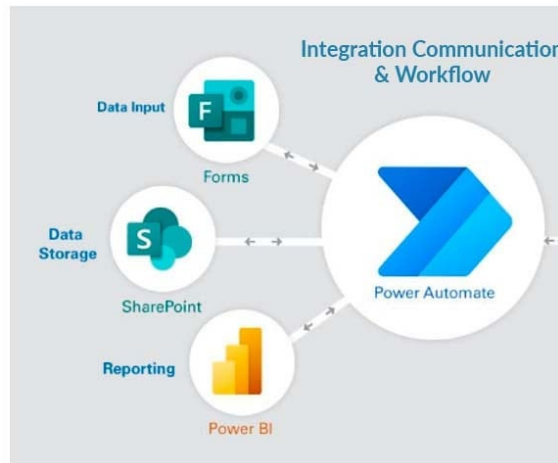


Assisting with Canceling the Balance

- With the abundant number of invoices that needed to be addressed, I was assigned to assist Amelia Block in canceling the balance or final closing certain purchase orders
 - Process
 - Receiving an email request to close out a purchase order
 - Analyze the attached checklist to see if it needed to be closed or canceled, on which line this action was to take place, and the open amount remaining on the order
 - Go into OBIEE and attach the checklist, confirm the information matched, perform the requested action, email the requestor when the process was complete
 - Purpose
 - With the current budget issues, this task has been moved up in importance to aid in canceling un-used funds for the backlog of opened purchase orders

Power Automate

- Microsoft program used for optimizing and automating business process within the Lab
- Projects
 - IA Findings
 - Pre-Award Review
 - Cancel the Balance/Final Close organization



Pre-Award

- File Review Requests
 - Create Microsoft Form
 - PowerAutomate flow takes the submitted form and populates a SharePoint list with the information for Compliance Specialist and Buyers to track new requests
- Pre-Award Review Process
 - Compliance Specialist claim requests from the list and review them in a live Excel form, that when submitted is inputted into a SharePoint document library for back and forth between Compliance and Buyers until the review is complete

Pre-Award

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+ New Page details Analytics Published 4/22/2024 Share

Welcome to Quality, Compliance and Policy

COMPLIANCE HUB
Your Review, Audit and Inquiry Station

Request a Procurement File Review (Pre-Award)

Procurement File Review Queue (Restricted)

Request a PF-08 Review

Procurement Review Files

PF-08 CR Risk Assessment Status

Request Procurement File Review

Hi, Trey. When you submit this form, the owner will see your name and email address.

* Required

Buyer Information

1. Buyer Name *

Enter your answer

2. Buyer Email *

Enter your answer

3. Procurement Department *

Select your answer

4. Procurement Manager Email *

Enter your answer

Next Page 1 of 5

Microsoft 365

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+ New Edit in grid view Share Export Forms Automate Integrate

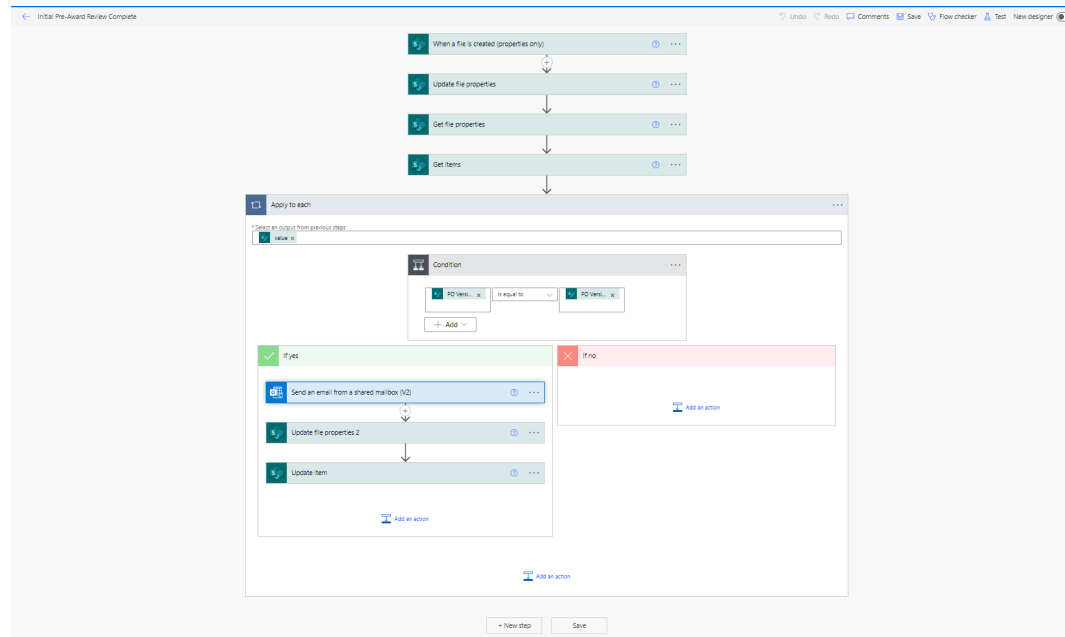
QCP in Process

Pre-Award Review Requests

Purchase Order	PO Version	Date Submitted	Status	Urgent	Compliance Re...	Anticipated Dol...	Procurement D...	Supplier Name	FormSubmitted...	Buyer Not
672515	0	01/04/2024	Complete	No	Francis J. Johns	\$1,047,159.61	LBNF Far Site	Thyssen Mining Inc	Bridget Fugett	
636269	0	01/08/2024	Waiting on Buyer	No	Francis J. Johns	\$33,701,200.00	LBNF Far Site	KALV	Troy Lark	
709516	0	01/10/2024	Complete	No	Elisabeth K. Dalle	\$709,516.00	Scientific & Enterprise Computing	Weeco Distribution	Brian J. Niccolai	
672515	0	01/12/2024	Complete	No	Francis J. Johns	\$961,631.82	LBNF Far Site	Thyssen Mining Inc	Bridget Fugett	
618313	0	01/16/2024	Complete	No	Elisabeth K. Dalle	\$568,273.00	Construction-AE	General Atomics	Chris Bushman	

Pre-Award

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New Upload Edit in grid view Add shortcut to OneDrive Pin to Quick access Export to Excel Automate Integrate All Documents								
Pre-Award File Reviews								
PO	PO Version	Status	Name	Buyer Name	Compliance Re...	Modified	Modified By	Add column
636269	0	Submitted to Buyer	636269_0_Troy Lark.xlsx	Troy Lark	Francis J. Johns	May 3	Troy Lark	
657426	18	Submitted to Buyer	657426_18_Yvette Torres.xlsx	Yvette Torres	Francis J. Johns	April 30	Yvette Torres	
672515	106	Submitted to Buyer	672515_106_Bridget Fugett.xlsx	Bridget Fugett	Francis J. Johns	5 days ago	Bridget Fugett	
680701	5	Submitted to Buyer	680701_5_Dustin Hansrote.xlsx	Dustin Hansrote	Bill Bishop	5 days ago	Bill Bishop	
690643	5	Completed	690463_5_Sandra Efsthathiou.xlsx	Sandra T. Efsthathiou	Bill Bishop	Yesterday at 8:54 AM	Bill Bishop	
711459	0	Completed	711459_0_Jacob Plastiak.xlsx	Jacob Plastiak	Bill Bishop	April 22	Bill Bishop	
711944	0	Completed	711944_0_Derek Hellauer.xlsx	Derek Hellauer x 40833N	Bill Bishop	6 days ago	Derek Hellauer x 40833N	
712303	0	Submitted to Buyer	712303_0_Yvette Torres.xlsx	Yvette Torres	Francis J. Johns	April 19	Yvette Torres	
713004	0	Completed	713004_0_Brian McKenzie.xlsx	Brian McKenzie	Bill Bishop	April 22	Bill Bishop	
713042	0	Completed	713042_0_Yvette Torres.xlsx	Yvette Torres	Bill Bishop	6 days ago	Bill Bishop	
713633	0	Completed	713633_0_Yvette Torres.xlsx	Yvette Torres	Bill Bishop	6 days ago	Bill Bishop	
713762	0	Completed	713762_0_Ryan Hairston.xlsx	Ryan K. Hairston	Bill Bishop	April 30	Bill Bishop	



Cancel The Balance/Final Close Automation

- New process being developed to partially automate and better organize new requests to cancel/close open amounts on purchase orders
- Develop new Microsoft form to process requests, populate responses into a SharePoint list, create a status column for updates, send notification emails to associated parties throughout the process
- This new method will remove the need to sift through an email inbox, provide a more organized view of all the requests, and automate responses to requestors when new actions have taken place on the PO in question

Cancel The Balance/Final Close Automation

Final Close or Cancel the Balance Checklist

Hi, Trey. When you submit this form, the owner will see your name and email address.

* Required

1. Division/Section *
2. Division or Section Budget FFM Signature *
3. Need this action by (Date): *

Please input date (M/d/yyyy)

When a new response is submitted

Get response details

Create Item

Send an email (V2)

To: Created By Email x

Subject: PO Title x

Body

Font 12 B U

Hello body/Requestor/DisplayName x

A new request to Final Close or Cancel the Balance has successfully been submitted. PO body/Title x has been requested to body/Choose One: x. The status of the request can be seen in the following SharePoint list. You will be notified if any additional information is needed, and when the request has been completed.

Link to Item: body/Link x

Thank you.
Procurement Team

Show advanced options

+ New step Save

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Home QCP Team Restricted Assurance & Compliance FPD Home Inside Fermilab IA Requests for University Audit 2023 Final Close or Cancel the Balance Checklist Recycle bin Edit										
+ New Edit in grid view Share Export Forms Automate Integrate										
Final Close or Cancel the Balance Checklist										
Requested Action	Reason	PO Number	Requestor	Division / Section	Vendor Name	Line Number	Shipment Num...	PO Extension	PO Complete	Open Commit...
Cancel The Balance	Relieve an open comr	123456	Trey Viramontes	TEST PPD	Trey Viramontes	1	1	No	Yes	\$123,456
Cancel The Balance	Relieve an open comr	123456	Trey Viramontes	TEST PPD	Trey Viramontes	1	1	No	Yes	\$123,456

PowerBI

- Microsoft program that focuses on business intelligence and allows us to upload excel spreadsheets for interactive data visualization
- Projects
 - Using data from OBIEE some finance metrics were compiled to see an overview of invoice aging
 - Project 2 was to help Chelsen with visualizations/metrics for his work with the Supplier Report Cards

Invoice Aging Dashboard

Vendor Name	Sum of Past Due 1-30	Sum of Past Due 31-60	Sum of Past Due 61-90	Sum of Past Due 91+ Days	Count of Invoice Id	Sum of Past Due Total
NORTHWESTERN UNIVERSITY	\$4,605.61	\$442,427.36	\$33,770.1	\$3,696,839.71	17	\$4,177,642.78
SOUTH DAKOTA SCIENCE & TECHNOLOGY AUTHORITY	\$1,774,565.33	\$0	\$0	\$0	3	\$1,774,565.33
UNIVERSITY OF WISCONSIN-MADISON	\$392,727.38	\$221,422.1	\$15,173.7	\$101,669.43	12	\$730,992.61
AON RISK SERVICES CENTRAL INC	\$730.250	\$0	\$0	\$0	4	\$730.250
LAWRENCE BERKELEY NATIONAL LABORATORY	\$498,046.13	\$0	\$0	\$4,502.19	13	\$502,548.32
Total	\$7,213,982.94	\$1,594,224.68	\$623,094.49	\$5,370,273.16	1199	\$14,801,575.27

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Vendor Name	Count of Invoice Id	Count of Count Past Due 1-30	Count of Count Past Due 31-60	Count of Count Past Due 61-90	Count of Count Past Due 91+
AALLTEMP INC.	2	1			
ABDISATAROV, BEKTUR	1	1			
ABRAMOWICZ, HALINA	1	1			
ACCELERATED TECHNOLOGY LABORATORIES, INC.	1				1
Total	1000	277	101	86	321

Vendor Name





\$7.21M

Sum of Past Due 1-30

\$1.59M

Sum of Past Due 31-60

\$623.09K

Sum of Past Due 61-90

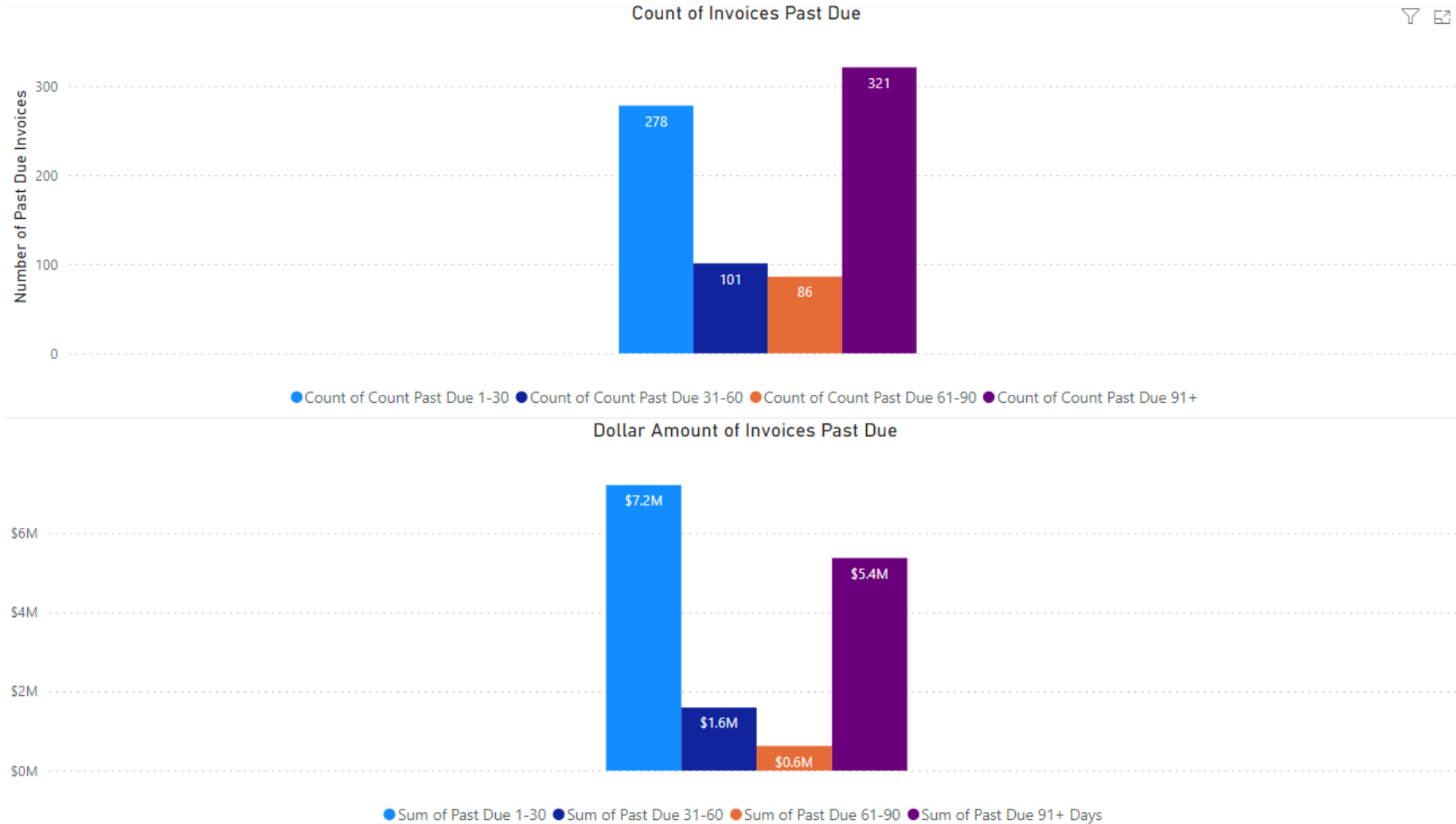
\$5.37M

Sum of Past Due 91+ Days

\$14.8M

Sum of Past Due Total

Invoice Aging Dashboard



Supplier Report Card

Clipboard	Data					Queries	Inse
Supplier Type/Supplier	PO COUNT	Small/Large	Local	Performance Grade	Latest SPA Rating		
Barton Marlow Company	289	Large	Yes	Exit	48%		
Burns & McDonnell Engineering	102	Large	Yes	Grow	100%		
ECS INC	210			Maintain	88%		
ECS INC	540	Small	Yes	Maintain	88%		
Emergent LLC	172			Grow	100%		
Emergent Safety Supply	148	SDB/WOSB	Yes	Grow	100%		
Emergent Safety Supply	1068	SDB/WOSB	Yes	Grow	100%		
KOI Computers	746	WOSB	Yes	Grow	100%		
Konecranes INC	148			Exit	36%		
Leverage Information Systems	212			Exit	60%		
Leverage Information Systems	585	Small	No	Exit	60%		
Leyden Electric INC	176	WOSB/SDB	Yes	Consider Grow	95%		
Leyden Electric INC	98			Consider Grow	95%		
Nexsan Technologies INC	116			Grow	100%		
Northern Illinois University	230	University		Consider Grow	92%		
Photonis Defense INC	165			Maintain	84%		
Prism Mechanical Corp	113	Small	Yes	Maintain	88%		
Bartholomew and Mechanical INC	118	Small	Yes	Exit	60%		

Supplier Type/Supplier

Search

23
Count of PO COUNT

Large
Type of Company

82%
Latest SPA Rating

Consider Grow
First Performance Grade

Supplier Type/Supplier	PO COUNT	Small/Large	Local	Performance Grade	Latest SPA Rating
Barton Marlow Company	289	Large	Yes	Exit	48%

Supplier Type/Supplier	PO COUNT	Small/Large	Local	Performance Grade	Latest SPA Rating
South Dakota Science & Technology Authority	192		Pause		72%

Supplier Type/Supplier	PO COUNT	Small/Large	Local	Performance Grade	Latest SPA Rating
Photonis Defense INC	165			Maintain	84%

Supplier Type/Supplier	PO COUNT	Small/Large	Local	Performance Grade	Latest SPA Rating
Northern Illinois University	230	University		Consider Grow	92%

Supplier Type/Supplier
barton

Supplier Type/Supplier
south dakota science

Supplier Type/Supplier
photonis

Supplier Type/Supplier
northern il

1 Count of PO COUNT	Large Type of Company	48% Latest SPA Rating	Exit First Performance Grade
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1 Count of PO COUNT	(Blank) Type of Company	72% Latest SPA Rating	Pause First Performance Grade
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1 Count of PO COUNT	(Blank) Type of Company	84% Latest SPA Rating	Maintain First Performance Grade
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1 Count of PO COUNT	University Type of Company	92% Latest SPA Rating	Consider Grow First Performance Grade
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Overall Takeaways

- Major improvement of my skills in data cleaning, interpreting, and visualizing
- New experience and skills with new programs such as OBIEE, SharePoint, PowerAutomate, and PowerBI
- Collaborating with new people to achieve common goals
- See how knowledge gained in school applies to real world problems and within the industry of business as a whole

Thank you for your time!