

PROJECT CHARTER

Project Title	Lean Project: Semi-Automated Reports and Dashboards Using SharePoint and Power BI	Project Lead	PASOS Joe
Project Start Date	Q1 2025	Project End Date	Q2 2025 Q1 2025

Project Business Case	Project Background
The current manual reporting is time-consuming and prone to errors, leading to inefficiencies and delays in decision-making. Automating these processes using SharePoint and Power BI will enhance efficiency, reduce manual errors, and provide real-time insights to stake holders. This initiative aligns with the organization’s goals of streamlining operations and improving data-driven decision-making.	The current reporting process involves manual data collection and consolidation, leading to inefficiencies and delays. This project aims to address these challenges by implementing a scalable and automated reporting system

Project Objectives	In Scope	Out-of-Scope
<ul style="list-style-type: none"><li>Automate reporting workflows to reduce processing time by 60%</li><li>Develop a dashboard for data-driven decision-making</li><li>Ensure system scalability and integration within existing infrastructure</li></ul>	<ul style="list-style-type: none"><li>Automating existing reporting processes and dashboard generation</li><li>Integrating SharePoint and Power BI for real-time data updates</li><li>Training end-users to utilize the new system effectively</li><li>Establishing control measures for system sustainability</li></ul>	<ul style="list-style-type: none"><li>Overhauling non-reporting related systems</li><li>Developing customer APIs or extensive data warehousing solutions</li></ul>

Key Deliverables	Risk Management		
<ul style="list-style-type: none"><li><b>Cost savings:</b> Time saved from automation (e.g., reduction in hours spent on manual report creation, overtime).</li><li><b>Error reduction:</b> Fewer manual errors, leading to better decision-making.</li><li><b>Efficiency gains:</b> Faster decision-making due to real-time reporting and dashboards.</li></ul>	Risk/Issues Description	Action Plan	Status
	Delay in integration with existing systems	Ensure robust testing & validation	Closed
	Resistance to change from end-users	Provide thorough training for end-users	Closed
	Data quality issues during migration	Close collaboration with Reporting Team	Closed

Key Roles & Responsibilities			Project Milestone		
Role	Name	Responsibilities	Phase	Activities	Target Date
LSS Greenbelt	PASOS, Joe	Oversee DMAIC – Project Charter	Define	Proposal & Approval Project Charter	JAN 2025
Manager	██████████	Stakeholder: Allocation of resources	Measure	Collection of baseline, and identification of key metrics	JAN 2025
Reporter	██████████	Linkage of SharePoint to Power Bi	Analyze	RCA & Prioritization of Automation opportunities	FEB 2025
			Improve	Implementation and UAT of dashboard	FEB 2025
			Control	Final deployment, user training, and sustainability measure	MAR 2025