Internal memo no. 912-172 - Const division Date: 04-7-2024

Subject: Implementation of Smartsheet.

Keywords: Smartsheet.

1. Smartsheet is like excel. However, it differs from excel in following ways:
   1. It has user control i.e., several users can work on the same sheet with differential rights.
   2. It is cloud based.
   3. The user types are:
      1. Owner – we have 3 subscriptions. Suneel, Shreya & Prashanth shall be owners. They have all rights.
      2. Admin (with/without sharing rights) – They have all rights except to delete, restore and backup. This will be given to Soham, Janaki & Meenaksi to start with.
      3. Editor (with/without sharing rights) – They can edit certain rows and columns and documents created by Owner /admin.
      4. Commentor (with/without sharing rights) – They can view and comment.
      5. Viewer (with/without sharing rights) – Can only view.
   4. The comments are in a conversation mode where comments of various staff can be seen. The comments can be marked to other staff for them to take action.
   5. It has features like scheduling with dates and dependencies. Change of predecessor can change the entire schedule. Schedule to be tracked. Gant charts can be generated.
   6. Trackers for material supply can be made where rows can be struck off when works are completed.
2. As a general practice the following should be implemented in most sheets:
   1. Entire sheet should be in Times New Roman font – 10 point.
   2. Select columns or entire sheet should be in wrap text format.
   3. In case of text – left align.
   4. In case of nos – right align with commas. Remove decimals unless absolutely necessary.
   5. Minimize width of columns to clearly display text.
   6. First column should be – ‘last comment’ – wherever required.
   7. Wherever required add check box for task completed. Once the check box is ticked, strike off entire row and lock it (no further edits). Create filter for active.
   8. Give read + comments access to relevant key members.
   9. Give edit access for select columns to select team members.
   10. Create global filters – that are shared with all.

Details of smartsheet to be maintained by various divisions.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| S No | Division | To be updated by | Name of smartsheet | Description/content | Frequency of update/ reports/remarks |
|  | Accts | Jai Prakash | GST regist. Tracker |  |  |
|  | Accts | Nirisha/  Rishabh | GV1 DD tracker |  |  |
|  | Accts | Sambasiva rao | IT refunds |  |  |
|  | Accts | Sambasiva Rao | IT returns tracker FY 23-24 |  |  |
|  | Accts | Jaya Prakash/ ramya | List of bank accounts |  |  |
|  | Accts | Jaya Prakash/ ramya | List of Expense card |  |  |
|  | Accts | Jaya Prakash/ ramya | Statutory replies |  |  |
|  | Accts | Sambasiva Rao/ ramya | Statutory replies |  |  |
|  | Accts | Naveen/Shiva | Details of loans |  |  |
|  | Admin | Aruna/ Ashaiya | Admin – list of consultants | List of consultants including legal, tax, bankers, CAs, advocates, architects, structural engineers, MEP consultants | Printout of list to be produced on 1st Saturday of every quarter. |
|  | Admin | Aruna/  Ashaiya | Admin- consultants, agreements, payments and correspondence | List of all agreements, details of payments, details of important correspondence – make project wise. Each project should have one row for one consultant. Add columns for agreements/LOC/LOI, payment details, correspondence – scan Ids. |  |
|  | Admin | Aruna/ Ashaiya/ Kanaka Rao | List of GOs, notifications, circulars, etc. | All relevant GOs, notifications, circulars, orders, memos, gazette notifications, etc., to be uploaded. Column heads: last comment, in force, category/dept, sub-category/description, brief description of order, order no., order date, issued by, scan id. | Once a quarter |
|  | Admin | Sanjay | MBMC – list of shops & offices | Existing excel sheet can be transferred to smartsheet |  |
|  | Admin | Aruna | Passport copies of SJK + RJK + Nisha |  |  |
|  | Admin | Kanaka Rao/Aruna | Permits tracker | Details of permits status to be update | Report required on 1st Saturday of every month. |
|  | Admin | Jai Kumar/ Akansha | Employee data | NA | nil |
|  | Admin | Jai Kumar/ Akansha | List of fines | NA | Report required by end of each month |
|  | Admin | Jai Kumar/ Akansha | Leave form | NA | NA |
|  | Admin-audit | Admin-audit | Gate pass and inter-site material transfer | Should contain details of all gate passes from 1/1/24 till 15/6/24 where material has been transferred between sites. It should contain all gate passes from 15/6/24. | Admin-audit to update the sheet on a daily basis including details of bills.  Janaki to coordinate with Admin-audit to preparation and approval of bills.  Admin-audit to send report to Soham on weekly basis. |
|  | Admin-audit | Admin-audit | Supplier reconciliation | Project wise sheet to be prepared | Admin-audit to provide statement on the 1st Friday of every month |
|  | Admin-audit | Admin-audit | Contractors reconciliation | Project wise sheet to be prepared | Admin-audit to provide statement on the 1st Friday of every month |
|  | Const |  |  |  |  |
|  | Legal | Lateef/ Likhita/ Sabitha | Legal – list of court cases | All court cases with next date of hearing related to admin- legal | Printout of list of pending cases to be submitted on the 1st Saturday of each month |
|  | Legal | Lateef/ Likhita/ Sabitha | Legal – list of important judgements/ orders | List judgments/ orders for cases not filed by us but are important reference for other cases. | Printout of list of pending cases to be submitted on the 1st Saturday of each quarter |
|  | Legal | Lateef/ Likhita/ Sabitha | Legal – List of legal opinions | All legal opinions of any nature | Printout of list of pending cases to be submitted on the 1st Saturday of each quarter |
|  | Legal | Lateef/ Likhita/ Sabitha | Legal – list of RTI applications | All RTI applications /appeals and responses | Printout of list of pending cases to be submitted on the 1st Saturday of each month |
|  | MEP | Meenakshi | GV1 equipment tracker | Equipment which means follow-up/plans, etc | Meenakshi to provide weekly reports |
|  | MEP | Meenakshi | NRK equipment tracker | Equipment which means follow-up/plans, etc | Meenakshi to provide weekly reports – once MEP work starts. |
|  | Purchase | Minish/ Janaki | Details of refund receivable from suppliers | Should contain details of excess paid deposits, etc. | Janaki to create the sheet. Accounts/ audit to help in updating the sheet from time to time.  Janaki to send weekly report to Soham. |
|  | Purchase | Minish/  Janaki | GST & Eway bill details | TBD |  |
|  | Purchase | Minish/  Janaki | Inter-site material transfer on loan or hire tracker | All materials transferred between sites from 1/1/24 to till date and further transfers | Janaki to create sheet. Janaki to update on a daily basis. Weekly report to sent to Soham. |
|  | Purchase | Purchase officers | Stock replenishment details | Should contain all items where stock is to be maintained with min. stock value and order value. | Janaki to create the list. Janaki to send list of items to be ordered to Soham on a daily basis. |
|  | Purchase | Gayatri | Tracker of requisition Vs PO | NA | Once a month on the 1st Friday of each month. |
|  | Purchase | Gayatri | Tracker of PO Vs material received | NA | Once a month on the 1st Friday of each month. |

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MEP tracker for equipment details:

* 1. Fire fighting system
     1. Fire alarm
        1. FRLS cable.
        2. Smoke detectors.
        3. Manual call point.
        4. Hooter.
        5. CO detectors.
        6. Addressable panel.
        7. Non-addressable panel.
        8. Fasteners.
        9. Cable tray
        10. Other detectors
        11. Alarm/gong bell.
        12. PA system
     2. Fire sprinklers/downcomer system
        1. MS pipes
        2. Butterfly valves
        3. Non-return valves.
        4. Flanges + dummies
        5. Nuts/bolts
        6. MS structures + fasteners
        7. Gear valve
        8. Other valves
        9. Stainer
        10. Pressure transmitter/guage
        11. Sprinklers
        12. Hose reel drum
        13. Hose box + pipe
        14. Fire inlet
        15. Fire hose cabinet
        16. Fire doors
        17. Silicone
        18. Booster pump + panel
        19. Gaskets
        20. Red paint
        21. SS/brass fittings
        22. Air release valve
     3. Fire pump room
        1. Main pump
        2. Jockey pump
        3. Butterfly valve
        4. Pressure pump
        5. Ms pipes & fittings
        6. Flanges + gaskets
        7. Nut bolt
     4. Fire system -Yard hydrant

1. Electric power supply
   1. HT works
   2. LT panels
   3. Cables
   4. Transformers
   5. Bus duct
   6. DG
   7. Earthing
   8. Lighting arrestor
   9. Timers
   10. VTPN
   11. Work orders
   12. Cable trays
   13. MS structure + hardware + fasteners
2. PHE
   1. CP & sanitary
   2. CPVC
   3. Pes & fittings
   4. OHT tanks
   5. Sumps
   6. Valves & NRVs
   7. Drainage pipes
   8. MS pipes & fittings
   9. Pumps
   10. ETP
   11. STP
3. HVAC
   1. Chillers
   2. Chiller pumps
   3. UMCC panels
   4. Cabels
   5. MS structure + hardware + fastener
   6. MS pipes
   7. Isolator panels
   8. Instrumentation
   9. Insulation
4. Other systems
   1. HSD
   2. Air compressor
   3. Vacuum
   4. VRV
5. Leave application form – fields:
   1. Company/firm (dropdown list – do not limit to list)
   2. Project /location (dropdown list – do not limit to list)
   3. Division (dropdown list - limit to list)
   4. Employee name
   5. Leave from date
   6. Last date of leave
   7. No. of days
   8. Type of leave (dropdown list – limit to list)
   9. Reason for leave
   10. Level 1 approval required from: (List of managers, directors, HR).
   11. Level 1 leave approved (Yes/No)
   12. Level 1 comments
   13. Level 2 approval required from HR.
   14. Level 2 leave approved (Yes/No)
   15. Level 2 comments
   16. Form must be directed to Level 1 email and HR email.
   17. After Level 1 approval/comments email to be directed to employee + HR.
   18. After Level 2 approval/comments email to be directed to employee.
6. Request for payment – fields
   1. Company/firm
   2. Project
   3. Pay to
   4. Payment type (dropdown list)
   5. Advance
   6. Amount
   7. Payment: (pay on coming Monday/others)
   8. Payment date:
   9. In case of other payment date, give reason.
   10. Payment mode (dropdown list)
   11. Brief description of payment (provide details of purpose of payment)
   12. VRN/CRN no.
   13. PO/WO no.
   14. Requested by & date:
   15. Approved by director
   16. Date of approval.
   17. Level 1 approval required from: (List of managers, directors, HR).
   18. Level 1 leave approved (Yes/No)
   19. Level 1 comments
   20. Level 2 approval required from HR.
   21. Level 2 leave approved (Yes/No)
   22. Level 2 comments
   23. Form must be directed to Level 1 email and HR email.
   24. After Level 1 approval/comments email to be directed to employee + HR.
   25. After Level 2 approval/comments email to be directed to employee.
7. L2 approval list. A file has been created to help Janaki asking for L2 approval. Janaki & Ashaiya shall be editors and Soham as the owner. Prabhakar and Minish can make comments. L2 approval by director to be edited by owner or Soham.
8. Prepare a smart sheet for warranties
   1. Make one smartsheet for every project including head office for equipment purchase. Label the file as HO equipment warranty details.
   2. Details of columns: Last comment, In warranty period, Equipment description, Date of purchase, PO no., Bill + warranty scan IDs, Warranty period, Warranty end date.
   3. One or two persons in each site to be authorized to update this sheet.
   4. Meenakshi- MEP and Janaki to be authorized to update all sheets of all sites.
   5. Meenakshi – Maint, to be authorized to update sheets of HO.
   6. HO sheet should have details of all equipment purchases related to HO, MBMC, Greens Towers, Plot 280 + all common use computers and peripherals.
   7. Include this SOP in smartsheets internal memo.
9. Name of form: Sale agreement authorization form

|  |  |  |
| --- | --- | --- |
| Sl. No. | Field | Field description |
|  | Project name | Drop down list. Limit to list. |
|  | Vendor name | Drop down list. Limit to list. |
|  | Flat/villa no. | Text/no. |
|  | Land area in sq yds | Text/no. |
|  | Super builtup area in sft | Text/no. |
|  | Car parking no. | Text/no. |
|  | Unit type | Drop down list. Limit to list (deluxe/luxury) |
|  | Buyer name | Text/no. |
|  | Buyer age | Text/no. |
|  | Buyer occupation | Text/no. |
|  | Buyer address | Text/no. |
|  | Buyer aadhar card | Text/no. |
|  | Buyer PAN card | Text/no. |
|  | North boundary | Text/no. |
|  | South boundary | Text/no. |
|  | East boundary | Text/no. |
|  | West boundary | Text/no |
|  | Total sale consideration | Text/no |
|  | Sale deed value | Text/no |
|  | Construction contract value | Text/no |
|  | Booking amount and payment details | Text/no |
|  | I instalment (description-amt) | Text/no |
|  | II instalment (description-amt) | Text/no |
|  | III instalment (description-amt) | Text/no |
|  | IV instalment (description-amt) | Text/no |
|  | V instalment (description-amt) | Text/no |
|  | VI instalment (description-amt) | Text/no |
|  | VII instalment (description-amt) | Text/no |
|  | VIII instalment (description-amt) | Text/no |
|  | IX instalment (description-amt) | Text/no |
|  | Other additional installments (description-amt) | Text/no |
|  | Date of completion | Text/no |
|  | Agreement of sale, booking form & plans tally? | Check box |
|  | Remarks | Text/no |
|  | Level 1 authorisation (CR manager) | Text/no |
|  | Level 2 authorisation (Accountant) | Text/no |
|  | Level 3 authorisation (director) | Text/no |
|  |  | Text/no |
|  |  | Text/no |
|  |  | Text/no |
|  |  | Text/no |

List of trackers to be made on smartsheets – accounts division

1. Name of form: Pending statutory replies – accounts division - Jaya Prakash.

|  |  |  |
| --- | --- | --- |
| SNo. | Field | Field description |
|  | Action to be taken/remarks | Text/no. |
|  | Task completed | Check box (strike off row once task is completed. |
|  | Firm/company | Text/no. |
|  | Department | Drop down list. Limit to list. |
|  | Period | Text/no. |
|  | Details of notice /case | Text/no. |
|  | Notice scan id no. | Text/no. |
|  | Notice received on | Text/no. |
|  | Reply due-date | Text/no. |
|  | Reply filed on | Text/no. |
|  | Reply scan id no. | Text/no. |
|  | Notes on implementation:  Ramya and Jaya Prakash shall be editors.  Printout of report required before every accounts meeting.  Make filter for active tasks. | |

1. Name of form: Pending statutory replies - Sambasiva Rao.

|  |  |  |
| --- | --- | --- |
| SNo. | Field | Field description |
|  | Action to be taken/remarks | Text/no. |
|  | Task completed | Check box (strike off row once task is completed. |
|  | Firm/company | Text/no. |
|  | Department | Drop down list. Limit to list. |
|  | Period | Text/no. |
|  | Details of notice /case | Text/no. |
|  | Notice scan id no. | Text/no. |
|  | Notice received on | Text/no. |
|  | Reply due-date | Text/no. |
|  | Reply filed on | Text/no. |
|  | Reply scan id no. | Text/no. |
|  | Notes on implementation:  Ramya and Sambasiva Rao shall be editors.  Printout of report required before every accounts meeting.  Make filter for active tasks. | |

1. Name of form: Accountants Vs Companies allotted.

|  |  |  |
| --- | --- | --- |
| S No | Field | Field description |
|  | Action to be taken/remarks | Text/no. |
|  | Firm/company | Drop down list. Limit to list. |
|  | Project | Drop down list. Limit to list. |
|  | Accountant name | Text/no. |
|  | Group | Drop down list. Limit to list (group1 – Rajya Laxmi, group 2 – Lavanya,….) |
|  | Notes on implementation:  Ramya to keep this list updated at all times. | |

1. Name of form: Project loans

|  |  |  |
| --- | --- | --- |
| S No | Field | Field description |
|  | Action to be taken/remarks | Text/no. |
|  | Priority | Priority |
|  | Loan status | Drop down list. Limit to list (under approval, for first disbursement, partially disbursed, fully disbursed, for enhancement, loan closed) |
|  | Loan closed | Check box (strike off row once task is completed. |
|  |  | Text/no. |
|  |  | Drop down list. Limit to list. |
|  |  | Text/no. |
|  | Notes on implementation:  Naveen to enter the fields required  All past & present loans to be entered in this sheet. | |

1. Name of form: Vehicle loans

|  |  |  |
| --- | --- | --- |
| S No | Field | Field description |
|  | Action to be taken/remarks | Text/no. |
|  | Loan closed | Check box (strike off row once task is completed. |
|  |  | Text/no. |
|  |  | Drop down list. Limit to list. |
|  |  | Text/no. |
|  |  | Text/no. |
|  | Notes on implementation:  Naveen to enter the fields required  All past & present vehicle loans to be entered in this sheet.  Add column for user – mention if vehicle for personal of any employee. | |

1. Name of form: Loan payments tracker

|  |  |  |
| --- | --- | --- |
| S No | Field | Field description |
|  | Action to be taken/remarks | Text/no. |
|  | Due date | Date |
|  | Amount paid | Check box (strike off row once task is completed. |
|  |  | Text/no. |
|  |  | Drop down list. Limit to list. |
|  |  | Text/no. |
|  | Notes on implementation:  Naveen to enter the fields required  Limit to current loans.  Create one check list for every month. At the end of the month modify the check list for the next month.  Ramya & Naveen to be editors | |

1. Name of form: Bank account list.

|  |  |  |
| --- | --- | --- |
| SNo. | Field | Field description |
|  | Action to be taken/remarks | Text/no. |
|  | Priority | Priority |
|  | Accounts status | Drop down list. Limit to list (Closed, Active, Blocked, Dormant, To be opened, To be closed) |
|  | Account closed | Check box (strike off row once task is completed). |
|  |  | Drop down list. Limit to list. |
|  |  | Text/no. |
|  | Notes on implementation:  Editors – Jaya Prakash & Ramya.  Enter all active and closed accounts in single list.  Jaya Prakash to define fields required. | |

1. Name of form: expense card list.

|  |  |  |
| --- | --- | --- |
| S No | Field | Field description |
|  | Action to be taken/remarks | Text/no. |
|  | Priority | Priority |
|  | Card status | Drop down list. Limit to list (Closed, Active, Blocked, Dormant, To be opened, To be closed) |
|  | Card cancelled | Check box (strike off row once task is completed). |
|  |  | Drop down list. Limit to list. |
|  |  | Text/no. |
|  | Notes on implementation:  Editors – Jaya Prakash & Ramya.  Enter all active and closed cards in single list.  Jaya Prakash to define fields required.  Add field for name on card and add field for user of card. | |

List of trackers to be made on smartsheets – Admin-audit division

Date: 23-5-2024

1. Name of form: <MPL> Supplier reconciliation statement.

|  |  |  |
| --- | --- | --- |
| S No | Field | Field description |
|  | Last comment | Text/no. |
|  | Task completed | Check box (strike off row once task is completed. |
|  | Name of supplier | Text/no. |
|  | VRN | Text/no. |
|  | Debit balance | Text/no. |
|  | Credit balance | Text/no. |
|  | Related PO/WO nos. | Text/no. |
|  | Status of work /receipt/installation | Drop down list. Limit to list |
|  | Remarks by site | Drop down list. Do not limit to list |
|  | Remarks by accountant | Drop down list. Do not limit to list |
|  | Remarks by Admin-Audit | Drop down list. Do not limit to list |
|  | Notes on implementation:  Admin-audit, site & accountant to be editors.  Status of work to be updated by site.  Report to be updated on a weekly basis – by way of zoom with site and accounts. - schedule to be made.  Report to be sent to MDs desk before every Admin-audit meeting. | |

1. Name of form: <MPL> Contractor reconciliation statement.

|  |  |  |
| --- | --- | --- |
| SNo. | Field | Field description |
|  | Last comment | Text/no. |
|  | Task completed | Check box (strike off row once task is completed. |
|  | Name of contractor | Text/no. |
|  | CRN | Text/no. |
|  | Debit balance | Text/no. |
|  | Credit balance | Text/no. |
|  | Work type | Drop down list. Do not limit to list |
|  | Contractor working at site | Drop down list. Do not limit to list |
|  | Work status | Drop down list. Limit to list |
|  | Remarks by site | Drop down list. Do not limit to list |
|  | Remarks by accountant | Drop down list. Do not limit to list |
|  | Remarks by Admin-Audit | Drop down list. Do not limit to list |
|  | Notes on implementation:  Admin-audit, site & accountant to be editors.  Report to be updated on a weekly basis – by way of zoom with site and accounts. - schedule to be made.  Report to be sent to MDs desk before every Admin-audit meeting. | |

1. Name of form: Contactors PF-ESI details

|  |  |  |
| --- | --- | --- |
| SNo. | Field | Field description |
|  | Last comment | Text/no. |
|  | Task completed | Check box (strike off row once task is completed. |
|  | Name of contractor | Text/no. |
|  | CRN | Text/no. |
|  | Last quarter | Text/no. |
|  | Total payment made in last quarter | Text/no. |
|  | PF registration required | Drop down list. Limit to list |
|  | Contractor registered for PF | Drop down list. Limit to list |
|  | No. of workers registered for PF | Text/no. |
|  | ESI registration required | Drop down list. Limit to list |
|  | Contractor registered for ESI | Drop down list. Limit to list |
|  | No. of workers registered for ESI | Text/no. |
|  | Details of PF/ESI registration | Text/no. |
|  | Remarks by Admin | Drop down list. Do not limit to list |
|  | Remarks by Admin-Audit | Drop down list. Do not limit to list |
|  | Notes on implementation:  Admin-audit, & admin to be editors.  Report to be updated on quarterly basis  Report to be sent to MDs desk before every Admin-audit meeting. | |