Version History

Ver. No.	Authors	Date	Reviewers	Review Date	Release Date
1.0	Project Management Office Team	27-Aug-2018	QMF	31-Aug-2018	03-Sep-2018
1.1	Project Management Office Team	4-Dec-2018	QMF	7-Dec-2018	9-Jan-2019
2.0	Project Management Office Team	29-Nov-2019	QMF	13-Dec-2019	16-Dec-2019
3.0	Project Management Office Team	02-Nov-2020	QMF	06-Nov-2020	10-Nov-2020

Change History

Ver. No.	Section	Date	Change Information	RFC No.
1.0	All	03-Sep-2018	New Release	-
1.1	6.0, 7.1 & 8.0	9-Jan-2019	Rephrasing of the 6.0, 7.1 & 8.0 Procedure	Document Modification Request Form
2.0	All	16-Dec-2019	Annual Review - change in PMO Quality objective from Proposal Tracker + Project billing to Proposal Tracker	-
3.0	All	10-Nov-2020	Annual Review	-

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<u>PMO Process</u>

1.0 Objectives
The objective of this document is to define the process for the Project Management Office (PMO) Team.

2.0 Scope
This process applies to all the processes, and / or sub processes under the purview of the Project Management Office (PMO) Team.

3.0 Policy

3.1 Policy Statement
- To collate accurate, and consistent data, and provide timely inputs to the senior management

3.2 Framework to Support or Implement this Policy
- The stated policy is implemented as per the procedure mentioned below

4.0 References to (checklists, forms, guidelines, lists, standards, templates, other processes)

Process Element	Description	ID
Checklists	NA	
Forms	Timesheet Format	QMS-L4-FR-PMO-01
	Travel Sheet Format	QMS-L4-FR-PMO-02
	STPA Format	QMS-L4-FR-PMO-03
	Project Margin Template	QMS-L4-FR-PMO-04
	Project Status Template	QMS-L4-FR-PMO-05
	Resource Updates Template	QMS-L4-FR-PMO-06
	Risk Management Plan	QMS-L4-FR-MR-03
Guidelines	Resource Portal Management	QMS-L4-GD-PMO-01
	Margin Compilation / Verification	QMS-L4-GD-PMO-02
	Conveyance Processing	QMS-L4-GD-PMO-03
	Project Monitoring	QMS-L4-GD-PMO-04
Lists	NA	
Standards	NA	
Other Processes	RUS	
	Conveyance Portal	

5.0 Entry Criteria

Inputs	Source Processes
Timesheet, Non Attendance Report	Consultants who are a part of delivery team
Resource Updates	RUS/ Technical/Project Managers
Margin calculation – support + project	RUS , Data from IRS (till 31st Oct) & from Oracle Fusion (since 1st Nov), HR Data, Payout, Conveyance portal
Project status & effort tracking	RUS/ Technical/Project Managers
Conveyance disbursement	Conveyance portal

6.0 Responsibilities

Role	Responsibilities
Manager – PMO	• To monitor the Program Management Office Team in maintaining service level processes • Monitoring employee level escalations and issues related to timesheet & conveyance claims • Monitoring the status of timesheet and conveyance disbursement process • Continue to evolve the processes and templates across delivery models • Review of the monthly project and support related deliverables – account level margins, resource deployment status, billing loss tracker, proforma /proposal tracker • Manage communications on regular reporting requests. – monthly, weekly & daily • Prepare consolidate and analyze data from various reports for monthly /quarterly & yearly review • Execute & Monitor service level lessons learned Post monthly data Review to identify key areas of improvement under various delivery models. • Weekly analysis of data that aids in monthly invoicing • Work out business related strategies on monthly facts and figures for upcoming month
Senior Executive - PMO	• Closure of timesheet processing activities as per deadlines • Handle employee queries & escalations over Phone /Emails and provide resolutions and track till closure of issues • Act as key contact point with the employees and seniors for queries related to timesheet and conveyance and margins • Analyze and identify exceptions/challenges and initiate efforts to reduce exceptions in a process. • Lead and participate for the improvement of processes and resolution of issues. Provide guidance to team in the identification of issues and development of solutions related to turnaround and quality of data • Support team in closure of daily/weekly/monthly MIS related to project & support. • Provide data requested by various teams – Sales/Delivery Engagement Manager/ Technical Managers - related to resource status /margin/proforma/proposal status for their respective accounts • Manage communication with HR & Finance

| Role	Responsibilities
Executive - PMO	• Co-ordinate for Timesheet processing activities and close them as per deadline along with follow-up for invoicing • Solve employee queries & escalations over Phone /Emails and provide resolutions related to timesheet and conveyance. • Collate and co-ordinate data for margin preparation, proforma, proposal tracker and their validation. • Follow-up for resource updates , update in system • Process conveyance & travel sheets of resources who have applied for same • Compilation of project related MIS

7.0 Process Description

The PMO team is responsible for collating the data from the various teams like Deployments, Project Delivery, HR, and Finance functions. The team collates the data provided by the respective teams, and prepares the dashboards for the contribution margins and reports on pending PO data, proposal submitted, and other details. This is a monthly activity for the team. The team coordinates with the Sales team for the new / renewal proposals to be submitted.

The team also looks into the reimbursement paid to the employees under different criteria. This fulfillment of the payments made after receiving final approval from HOD.

The PMO team, has the following work tasks

➢ Project Management Office – collating / verification of data for Weekly, Monthly and Quarterly Reviews
➢ PMO Reimbursements – Verification and approval of Employee Conveyance.

Overview Diagram
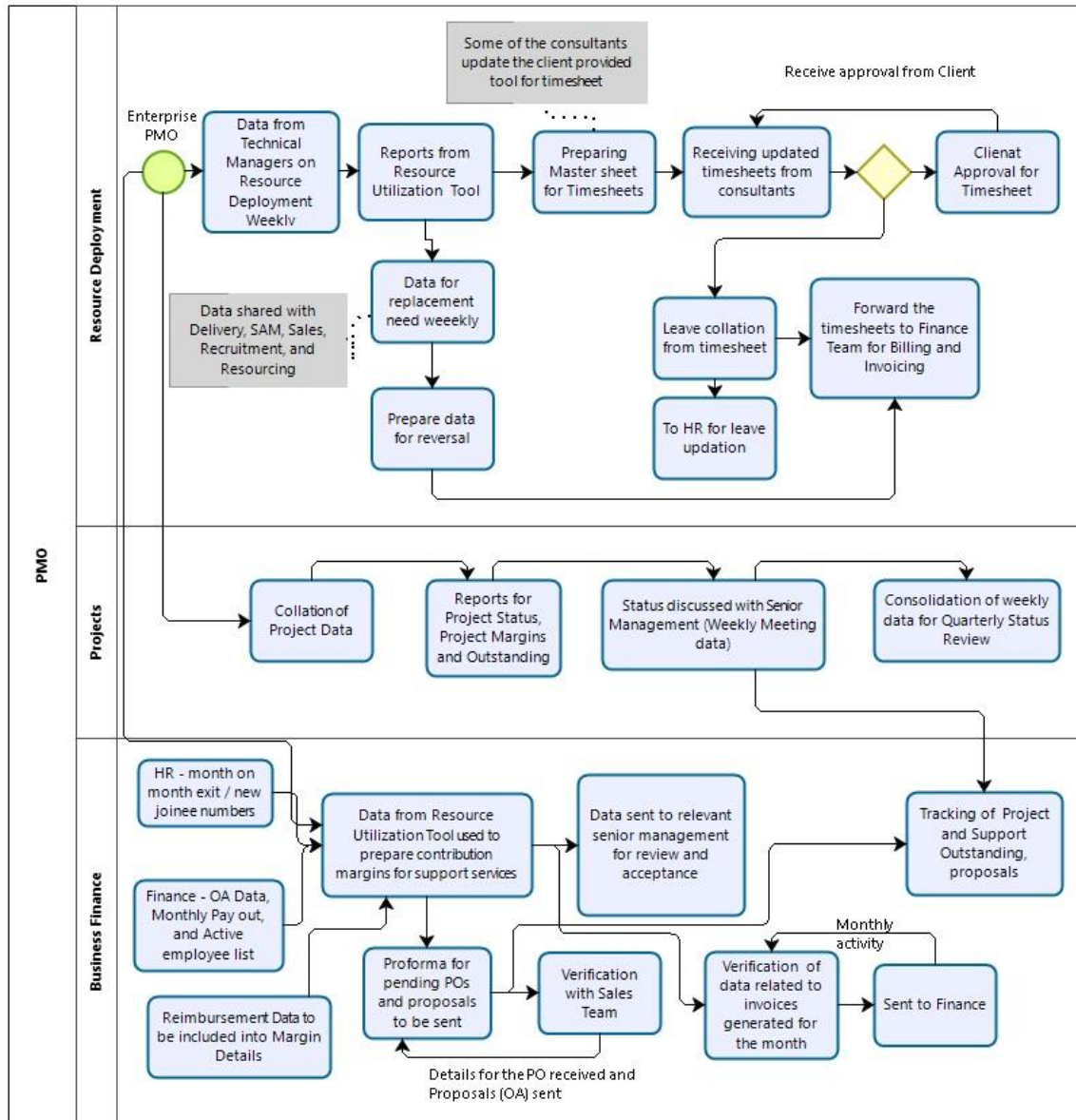
7.1 Procedure for PMO Function

7.1.1 Resource Deployment

- The Project Management Office (PMO) team has to collate data from project managers for projects and processes on a monthly basis
- The team extracts the weekly data from the Resource Utilization tool, and sends the same for verification to the various team wise Delivery,
- The Technical Managers updates the details from the Resource Utilization tool for the resource deployment of their respective technology track on a weekly basis.
- This verification is for processing the margin & reversal of data, i.e. in case of any employee leaves, replacement details, or any new assignments

- Based on the data from the Resource Utilization tool and the confirmation from the other teams, a Master list is prepared for all the employees to be intimated for the Timesheet submission.
- The identified resources are mailed a Timesheet template, a certain section of resources / consultants would be updating the details for their attendance and work on the format provided by the client. Work Instruction document details the process for timesheet data collection
- The PMO team receives the updated timesheets from the resources, and collates it as per their defined format.
- Specific clients and the CIPL, have agreed that the timesheets from resources would be approved by the client before any other processing is initiated
- The timesheet submitted by the resources with these clients are sent for approval by consultants themselves
- In case of any queries or discrepancies, the resource is expected to resolve the same, and re-submit the timesheet.
- Simultaneously the PMO team collects the data for the leaves availed by the resource, and sanitizes the timesheet.
- On receiving the approval from the client and the other resources, the sanitization and leave details are verified.
- The team then forwards the leave data to the HR, for synchronizing their data, and the Finance Team is provided with the data for invoicing and billing formalities

7.1.2   Data from Projects

- The PMO team initiates data to be received from the Project teams.
- The data submitted by the projects is used for the Weekly reviews with the Senior Management
- The reports pertaining to the Project Status, Project Margin, and Outstanding is collated
- Other details like the project sign-offs, issues etc. are also recorded as part of the reports
- These reports are the inputs for the Weekly Status Review and quarterly meetings
- Project ID is created by the PMO Team for project and services based on Engagement Naming Doc as and when PIN details sent by project managers

7.1.3   Data for Business Finance

- The margin contributions are calculated with the help of data that is received from various inputs
  - HR provides the month-on-month details of the number of new joinees, and the exits that have taken during the month
  - Finance supplies the data for the Fusion ID, monthly pay-outs, active employee list
  - The Reimbursements that are paid during the month are also included as part of the contribution margin reports
  - Resource Utilization tool, also supplements details related to the support services
- The team after receiving the data from the respective teams collates it as per their defined formats and sends back margin details to the respective team senior management for review, verification and acceptance.
- Simultaneously the proforma pertaining to Purchase Orders (PO), and Proposals sent, is prepared and verified with the Sales Team. Final copy is shared with sales team for proforma. The details of the projects and support tracking are also verified for PO with Oracle Fusion.
- Reversal data for credit note details are sent to finance; the invoicing details are prepared by Finance team after verification and clarifications from respective teams
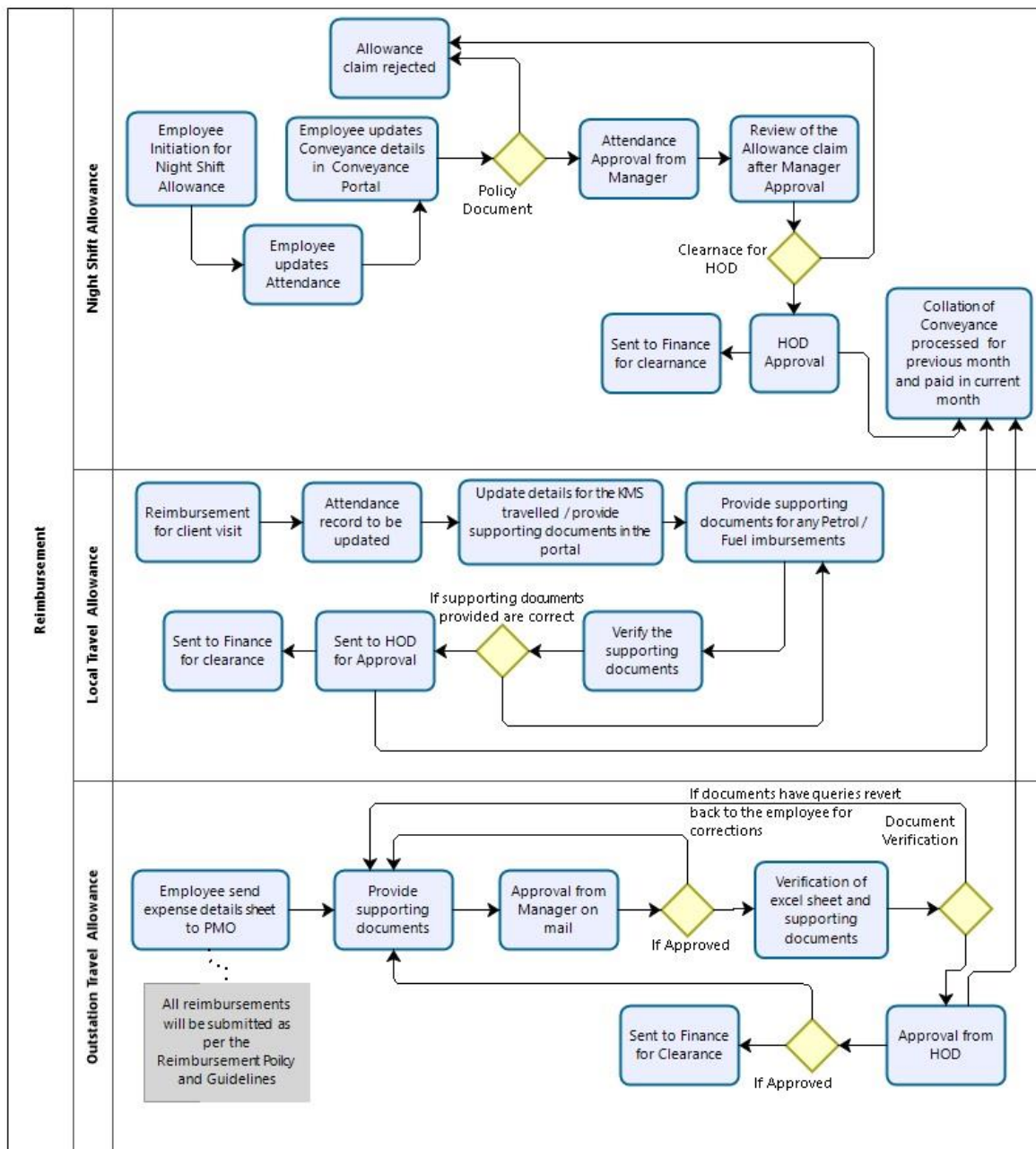
7.2 Procedure for PMO Reimbursement Function

This function of the PMO team, undertakes the reimbursement of conveyance that is provided to the employees based on the different criteria. The function performs the task as per the conveyance process document.

Reimbursement is provided to the employee on any of the following scenarios

- ➢ Night Shift Allowance
- ➢ Local Travel Allowance
- ➢ Outstation Allowance

7.2.1 Night Shift Allowance

- Employee can apply for the Night-shift Allowance in case of any work assignments performed between 11.00 pm and 6.00 am for more than 2 hrs.
- The employee updates the attendance for the day, and updates the conveyance details on the portal.
- The team checks the claim for the conveyance based on the policy requirements which have been defined
- The conveyance claim would be rejected, if the criterion under which it is paid is not fulfilled.
- The attendance approval from the Manager is obtained for the conveyance details pertaining to the night-shift allowance
- The allowance claim is again reviewed once the Manager approval is obtained.
- The next level of approval is taken from the HOD of the department.
- On receiving the approval from the HOD, the Finance team is intimated for the payment.
- The reimbursement team simultaneously updates data for the allowance paid for the current month and the claims that are process for the previous month.

7.2.2 Local Travel Allowance

- Managers who travel to the client site, locally, are eligible for Local Travel Allowance
- Employees have to update the attendance for the date of travel.
- The details to be updated in the tool, along with the supporting documents like, petrol bill, or any bill / invoice from the rental taxi service.
- If no supporting documents are provided with the claims, then the reimbursement is made on the actuals calculated As per policy
- On verification of the supporting documents, in case of any queries, the employee is intimated for the same to furnish the requirements.
- The claim is then presented for the HOD approval
- The Finance team is forwarded with all the claim details and the supporting documents with the necessary approvals to process

7.2.3 Outstation Travel Allowance

- Employees after their outstation travel shall submit the detailed Expense sheet to the PMO team
- The employee has to check the Reimbursement Policy and Guidelines, to understand the criteria under which the Outstation allowance can be claimed
- Supporting documents namely; travel ticket, local travel expenses, any other bills or invoices.
- The employees has to get the approval from their Manager, this approval can be received on mail, and needs to be forwarded to the PMO team with the claim details
- The employee has to provide necessary details in case the Manager has as any queries.
- Once the approval from the Manager is intimated, the Reimbursement Team, will verify the supporting documents, and in case of queries the employee is reverted with the same.
- If the claim, with the necessary approvals and supporting documents are in place, the claim is forwarded to the HOD for approval.
- The loop regarding the queries from HOD, follows the same path of the employee provided the required replies to the queries.
- HOD approval is a clearance to the claim, and the Reimbursement Team can forward the claim to the Finance team for reimbursement.

8.0 Quality Mechanisms

- Resource deployment details are reviewed weekly after updates done in the system
- Timesheets are validated as per process documents.
- Non-attendance report is reviewed based on timesheets received.
- Replacement & Reversal is validated with resource deployment data received from technical managers.
- Project details are reviewed based on technical managers' updated feedback.
- Support margin is reviewed with invoice details.
- Proforma, Proposal Tracker validated based on compiled margin details for the month.
- Conveyance reimbursement data (Travel sheet and STPA Data) is reviewed based on HR policies.
- HR Data and active employee data are verified as per resource deployment data and queries rose to Respective teams.
- Back-up plan for PMO Team: For any confidential data, in the absence of Manager PMO approval of Respective HOD will be taken by PMO team members.

9.0 Quality Objectives

Sr. No	Objectives	Responsibility	Frequency of Measurement	Reporting of Measurement	Target to Achieve
1)	To close collation of timesheets	PMO Team	Monthly (10th of every month)	Consolidated Client wise Timesheets	75%
2)	To process conveyance (includes travel + STPA)	PMO Team	Monthly (25th of every month)	Conveyance Report & Consolidated Travel Reimbursements	100%
3)	Support/Project Margin communication to senior management	PMO Team	7th of every month	Project Margin Dashboard	100%
4)	Resource Updates +Replacement tracking	PMO Team	Weekly (Thursday/Friday)	Weekly Replacement Report	100%
5)	Leave ledger to HR	PMO Team	Monthly (20th of every month)	Leave Ledger Report	100%
6)	Reversal Data to Finance	PMO Team	Monthly (10th of every month)	Reversal Report	100%
7)	Proposal Tracker	PMO Team	Monthly	Proposal Tracker	100%

10.0 Identified Risk
- All risks identified for the process will be recorded into the Risk Management Plan (RMP)
- Risks will be reviewed and monitored as per the agreed schedule

11.0 Exit Criteria

Outputs
Timesheets Consolidations

Non Attendance Report
Replacement
Reversal Data
Project Margin
Project Invoicing/Outstanding
Support Margin
Proposal Tracker
Conveyance Reimbursement data
Risk Management Plan
Strategy Presentation