



ONGC Videsh Ltd.



2021

Paperless Office- Generic BD Approval Process – User Manual

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1 Introduction

This document is intended to guide you step by step through the Paperless E-Office Application.

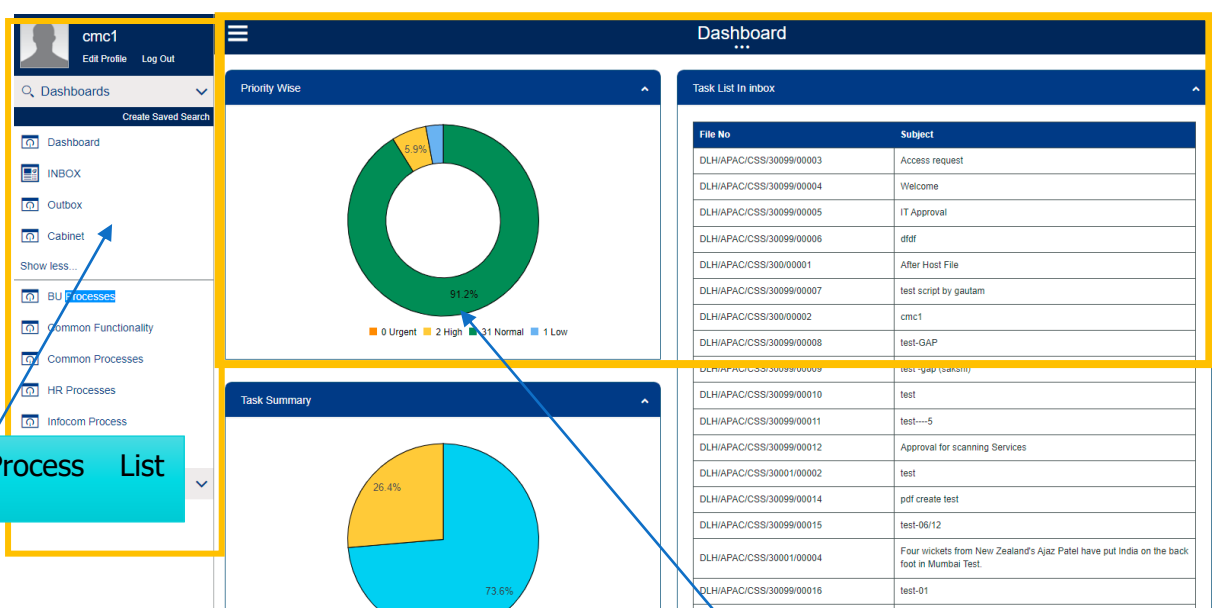
2 Login in the Paperless office:

- Open the Process Portal URL: <https://disha.ongcvidesh.in/ProcessPortal/login.jsp>
- Enter Your Windows username/ Password.



3 Login Screen Overview:

- Dashboard screen



Dashboard – It is a graphical representation of Task

- Inbox Screen

INBOX

File Name	File Subject	Stage	Task Name	Task From	Priority	Task received date
DLH/APAC/CSS/30099...	GAP Manual	Generic File Initiator	Generic File Initiator		Normal	Dec 8, 2021, 12:38...
DLH/APAC/CSS/30001...	test-01	User Access Managem...	User Access Managem...		Normal	Dec 8, 2021, 12:12...
DLH/APAC/CSS/30008...	incident testing	Incident/Activity Report...	Incident/Activity Report...		Normal	Dec 8, 2021, 11:15.3...
DLH/APAC/CSS/30020...	test of reappropriation	Re-Appropriation of Bu...	Re-Appropriation of Bu...	cmc3 (900004)-Genera...	Normal	Dec 7, 2021, 9:27.5...
DLH/APAC/CSS/30020...	Test	Re-Appropriation of Bu...	Re-Appropriation of Bu...		Normal	Dec 7, 2021, 8:49.2...
DLH/APAC/CSS/30020...	Test By gautam	Re-Appropriation of Bu...	Re-Appropriation of Bu...	cmc3 (900004)-Genera...	Normal	Dec 7, 2021, 7:01.3...
DLH/APAC/CSS/30008...	TEST-MANUAL	Re-Appropriation of Bu...	Re-Appropriation of Bu...		Normal	Dec 7, 2021, 3:02.5...
DLH/APAC/CSS/30008...	test-manual	Re-Appropriation of Bu...	Re-Appropriation of Bu...		Normal	Dec 7, 2021, 3:00.4...
DLH/APAC/CSS/30001...	testing	Re-Appropriation of Bu...	Re-Appropriation of Bu...		Normal	Dec 7, 2021, 12:02...
DLH/APAC/CSS/30003...	Intrest Penalty on statu...	Re-Appropriation of Bu...	Re-Appropriation of Bu...		Normal	Dec 7, 2021, 11:59.2...
DLH/APAC/CSS/30008...	test-INCIDENT	Re-Appropriation of Bu...	Re-Appropriation of Bu...		Normal	Dec 7, 2021, 11:48.1...
DLH/APAC/CSS/30001...	test-123	HR Onboarding Initiator	HR Onboarding Initiator		Normal	Dec 6, 2021, 5:13.4...
DLH/CSS/HR/30002/0	Onboarding - Renu Ma...	Onboarding - Renu Ma...	Onboarding - Renu Ma...	SHIVANGI KIRTI (\$694...	Normal	Dec 6, 2021, 4:39.5...
DLH/APAC/CSS/30099...	test-01	Generic File Initiator	Generic File Initiator		Normal	Dec 6, 2021, 11:23.0...
DLH/APAC/CSS/30001...	Four wickets from New...	User Access Managem...	User Access Managem...		Normal	Dec 6, 2021, 11:04.2...
DLH/APAC/CSS/30099...	test-06/12	Generic File Initiator	Generic File Initiator		Low	Dec 6, 2021, 11:01.4...

View Process List

Inbox - View task assign to you

4 How to run the BDProcesses

- Click on BD Processes.
- BD Page displayed. List of Processes should be displayed. Process name with Launch button displays in table.

BD Processes

Process Name	Launch
Generic BD Approval Process	Launch

Showing entry 1 of 1 entries

Click on BD Processes button on the Process list

5 Generic BD Approval Process Launch:

- Click on Launch button.

- Meta Data, File Action Panel will open.
- Enter the entire metadata field displayed on the Create file screen. **Note: Location, Section, Sub section, Priority will show repopulated based in the User login profile. If users want to change the repopulated field, he/she can select other value form the dropdown.**
- Select Projects and Type of Approval from the dropdown.
- In the Subject section enter the name of the file to be created.
- In the File action click Create in order to create new file. Click Exit to Exit.

- Click on Create button of File Action panel.

Meta Data

Location

Delhi

Section

EC Cell

Sub Section

Office of Managing Director

Projects

NA

Type of Approval

Pursuance of new business developme...

Subject

Generic BD Example

Priority

Normal

File Action

Exit

Create

Click on Create button

- Click on Yes button.

Confirmation

Are you sure you want to create file? File once created cannot be Discarded.

Click on Yes button.

- Based on metadata entered at the time of file Selected/Entered, Unique File No get Created.

Note: File No convention based on Location/Sec/Sub Sec/File tag/File No Serie.g.,DLH/ECC/OMD/10008/00003

6 Initiator Screen

Following Screen Opens in Full View:

6.1 Form Information

Meta Data – Meta Data shows the Location, Section, Sub Section, Project, Type of Approval, Subject, Priority.

BDP Clause –View BDP button is displayed to view BDP Clause.In this Desired Amount is to be entered in the required field as per BDP and currency is selected from the drop down (Ex. INR, USD etc.).

SAP T-Code - Select SAP T-Code from dropdown.Get SAP button is displayed to get the SAP.

Office Note/ Green Sheet – User can type the contents of the note sheet for which the approval is required in the file.

Note Sheet(s) – It shows the complete Note of Green Sheet/Office Note .

Enclosure – User can add the Enclosure by clicking on Add button.

Yellow Note –They are similar to the yellow post-it stickers we use in physical files. They are like informal instruction provided to the next user which is not recorder in the note. Since this is a informal way of communication this can be removed by any user once he reads the instruction. This does not for part of the note. However, it is user's purgative to remove the yellow note when he feels.

File Workflow– On click of this button, the workflow members of the file is shown.

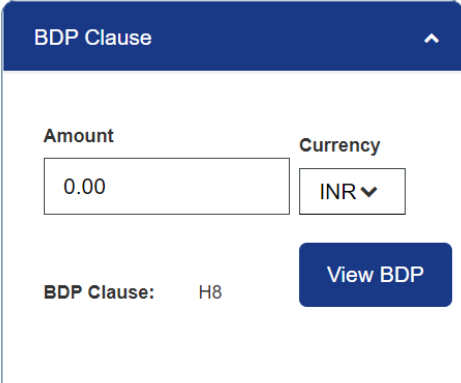
File Action – File Action section has three buttons:

- i. Save & close – File is saved in Inbox.
- ii. E-Sign –User can sign and forward the file.
- iii. History –User can view the history of file.

Outbox –Outbox will list all the task that a user has worked on and forwarded to any user from his/her inbox. User can also see the current status of the file through “History” button after opening the task in his Outbox.

6.2 BDP Clause

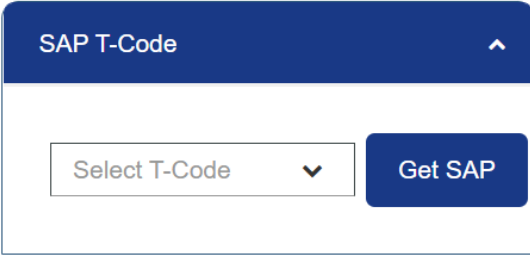
- Enter Amount and Select currency as per BDP.



The BDP Clause form has a dark blue header with the title "BDP Clause" and an upward arrow. Below the header, there are two input fields: "Amount" with the value "0.00" and "Currency" with a dropdown menu showing "INR" and a downward arrow. At the bottom left, there is a label "BDP Clause:" followed by the value "H8". At the bottom right, there is a dark blue button labeled "View BDP".

6.3 SAP T- CODE

- Select SAP T-Code from dropdown.



The SAP T-Code form has a dark blue header with the title "SAP T-Code" and an upward arrow. Below the header, there is a dropdown menu with the text "Select T-Code" and a downward arrow. To the right of the dropdown menu is a dark blue button labeled "Get SAP".

6.4 Add Office Note/ Green Sheet

- Write Comments in Office note/Green Sheet.



सार्थक पत्र / Working Paper

A paragraph is a self-contained unit of discourse in writing dealing with a particular point or idea. A paragraph consists of one or more sentences. Though not required by the syntax of any language, paragraphs are usually an expected part of formal writing, used to organize longer prose.

Write Comments in
Office Note/Green
Sheet

6.5 Add Enclosure

- User can view the document with or without annotation.
- User can do the annotation on the enclosure after opening the enclosure in Preview Windows.
- Select the option in Enclosure section to open the document with annotation or without annotation
- Select the document after selection view option.

Enclosures

☐ With Annotation ☐ Without Annotation

Description	By	Date	Actions
Showing 0 entries			

Previous Next

Add Delete


Click on Add button to add Enclosure

- Click on Add Button of Enclosure.
- Fill all the details of box, upload document and then click on Add button. (Description is mandatory field)
- Click on Add Button.
- Also you can Delete your enclosure, on clicking of radio button of your enclosure.

Add Enclosure

Description :

Page No :

 **Browse** Generic(Scrsht).docx

Add **Exit**

Add Description, Page NO. Upload Document.

Click on Add button

6.6 Add Yellow Note

Yellow Notes

Date By

Showing 0 entries

Add Yellow Note

Click on Add Yellow Note button

- Click on Add Yellow Note button of Yellow Notes.
- Fill the box of yellow note.
- Click on Add Button.

Add Yellow Note

Yellow Note:

Add **Exit**

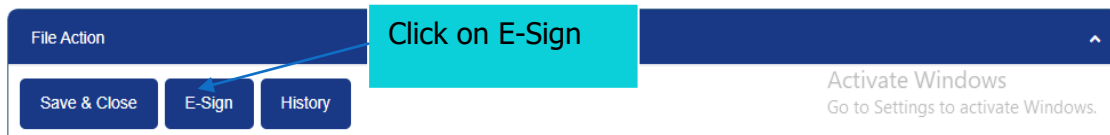
Type Yellow Note and click on Add button

7 Sending a File

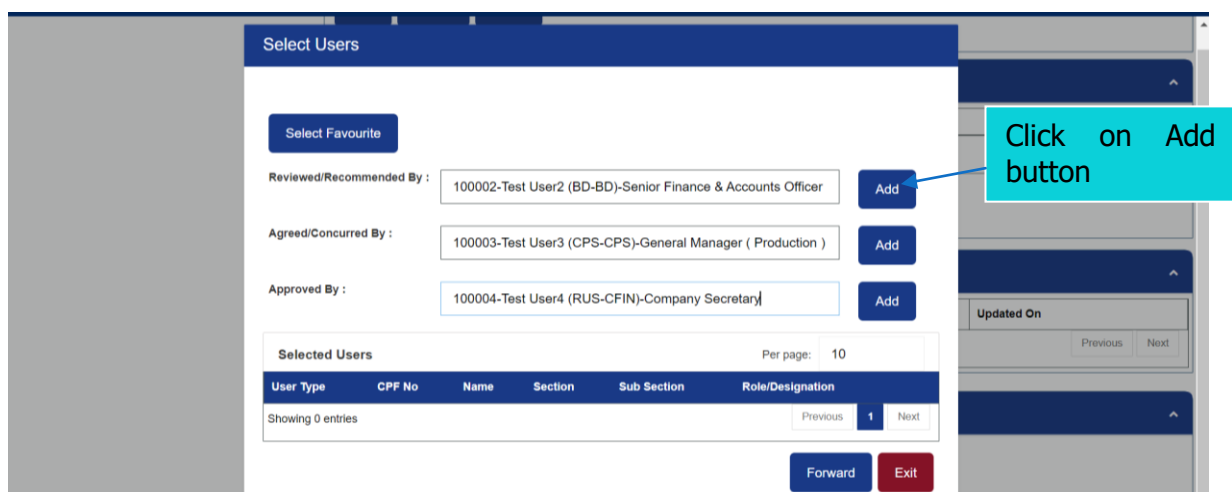
7.1 Initiator Screen

- Click on E-sign button.

Note: On click on save button. Noting will saved as Draft.



- Select the user of Reviewed/Recommended By(Optional), Agree/Concurred By(Optional) and Approved field(Mandatory)
- Click on Add Button.



- All users are showing in table of selected users.
- Click on Forward button.

Select Users

Select Favourite

Reviewed/Recommended By :

Type user name,cpf no,designation..

Add

Agreed/Concurred By :

Type user name,cpf no,designation..

Add

Approved By :

Type user name,cpf no,designation..

Add

Selected Users

Per page: 10

User Type	CPF No	Name	Section	Sub Section	Role/Designation	
Reviewed/Recommended By	100002	Test User2	BD	BD	Senior Finance & Accounts Officer	
Agreed/Concurred By	100003	Test User3	CPS	CPS	General Manager (Production)	
Approved By	100004	Test User4	RUS	CFIN	Company Secretary	

Showing 1 to 3 of 3 entries

Previous

1

Next

Forward


Exit

Click on Forward button.



- Now task go to the Reviewer/Recommender.
- Login to Reviewer/Recommender user.

7.2 Reviewer/Recommender Screen

- Task shown in Inbox.
- Now open the task.


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11

Test User2

Edit Profile Log Out

INBOX

...

Enter search text...

Dashboards

Create Saved Search

Dashboard

INBOX

Cabinet

Show more...(24)

Launch

Access Authorization Generic Process


Mortgage Approval Process

Sanction Process

File Name	File Subject	Stage	Task Name	Task From	Priority	Task r
DLH/ECC/OMD/1...	Generic BD Exa...	Generic BD File ...	Generic BD File ...	Test User1 (1000...		Dec
DLH/BD/BD/1052...	tttt	Government Appr...	Government Appr...	Test User3 (1000...		Dec
DLH/BD/BD/1050...	Test User5	Change in Assign...	Change in Assign...	Test User1 (1000...		Dec
DLH/ECC/OMD/1...	Test BDP	Ge		Test User1 (1000...		Dec
DLH/BD/BD/1051...	Part file sign btn t...	Pa		Test User1 (1000...		Dec
DLH/ECC/OMD/1...	Part case sign bt...	Pa		Test User2 (1000...		Dec
DLH/ECC/OMD/1...	Part case sign bt...	Ap		Test User1 (1000...		Dec
DLH/BD/BD/1052...	Generic Committ...	Generic Committ...	Generic Committ...	Test User1 (1000...		Dec
DLH/BD/BD/1059...	Generic test 01	Generic File Initia...	Generic File Initia...			Dec
DLH/ECC/OMD/1...	Committee Appr...	Generic File Appr...	Generic File Appr...	Test User2 (1000...		Dec
DLH/ECC/OMD/1...	Approver test 02	Approver Part File	Approver Part File	Test User1 (1000...		Dec

Task is visible in Inbox

- Write Comments in Office note/Green Sheet .



सार्थक पत्र / Working Paper

A paragraph is a self-contained unit of discourse in writing dealing with a particular point or idea. A paragraph consists of one or more sentences. Though not required by the syntax of any language, paragraphs are usually an expected part of formal writing, used to organize longer prose.

Write Comments in Office Note/Green Sheet

- All the sign of users shown in Office Note.

☰

Generic BD File Reviewer / Recommender

...

File No

DLH/ECC/OMD/10008/00003

Creation Date

20-12-2021

Priority

Normal

Age Of File (in Days)

0

Year

2021-22

Subject

Generic BD Example

Location

Delhi

Meta Data

BDP Clause

Amount : 1,000 USD

BDP : H8

View BDP

SAP T-Code

Select T-Code

Get SAP

Office Note / Green Sheet



सार्थक पत्र / Working Paper

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce non imperdiet erat, non tincidunt urna. Mauris iaculis consequat nulla molestie v arius. Duis eleifend, tortor vel tempor lobortis, tellus est egestas dolor, sed interdum felis lectus eu lectus. Cras sit amet mattis lectus, at placer at dolor. In ut molestie magna. In nec urna eget metus posuere tempus. Nulla ac sodales quam. Cras diam sapien, rhoncus a mi id, euismod v enenatis libero. Phasellus pretium metus ut urna malesuada dapibus. Vestibulum vel tortor sed massa pulvinar suscipit. Donec posuere felis e u est porta, eget elementum nisi malesuada.

Submitted for approval under BDP clause H8 for USD 1,000.00.

Forwarded & Electronically Signed By :
Test User1 (100001)-Director (Finance)
On : 20.12.2021 06:15:54 PM

- Click on E-sign button.

File Action

Save & Close

E-Sign

History

Click on E-Sign

- When you select Return to Initiator, task goes to the initiator, for doing next action. When you select Forward for Review, task go to the selected user.
- Select Review/Recommended on Select Action.
- Click on Forward button.

Action With eSign

Select Action

☒ Review / Recommend
 ☐ Return to Initiator
 ☐ Forward For Review

Forward

Exit

Select Action and Click on Forward Button

- Task goes to the Agree/Concurren.
- Login with Agree/Concurren User.



7.3 Agree/Concurre Screen

- Open the task from Inbox.

The screenshot shows the 'INBOX' interface for 'Test User3'. A table lists tasks with columns: File Name, File Subject, Stage, Task Name, Task From, Priority, and Task receive. The first task is highlighted with a yellow box. A blue arrow points from a text box 'Task is visible in Inbox' to this task.

File Name	File Subject	Stage	Task Name	Task From	Priority	Task receive
DLH/ECC/OMD/1...	Generic BD Exa...	Generic BD File ...	Generic BD File ...	Test User2 (1000...		Dec 20, 20...
DLH/BD/BD/105/...	test----	Cash and Bank R...	Cash and Bank R...	Test User2 (1000...		Dec 20, 20...
DLH/BD/BD/105/...	test	Cash and Bank R...	Cash and Bank R...			Dec 20, 20...
DLH/BD/BD/105/...	test-note4	Cash and Bank R...	Cash and Bank R...			Dec 20, 20...
DLH/BD/BD/105/...	cash and bank	Cash and Bank R...	Cash and Bank R...			Dec 20, 20...
DLH/BD/BD/105/...	testnote3	Cash and Bank R...	Cash and Bank R...			Dec 20, 20...
DLH/BD/BD/105/...	test note2					Dec 20, 20...
DLH/BD/BD/105/...	test-note					Dec 20, 20...
DLH/BD/BD/105/...	test					Dec 20, 20...
DLH/BD/BD/105/...	testing	Change in Bank ...	Change in Bank ...			Dec 20, 20...
DLH/BD/BD/105/...	testing lovely	Change in Bank ...	Change in Bank ...			Dec 20, 20...
AMS/IPS/IPS/4	opinion on local	Generic Local Fil	Generic Local Fil			Dec 17, 20...

- All the sign of users shown in Office Note/Green Sheet.

The screenshot shows the 'Generic BD File Agree / Concurrer' screen. The 'Office Note / Green Sheet' section displays a green background with text and signatures. The text includes 'Submitted for approval under BDP clause 10 for USD 1,000.00.' and 'Forwarded & Electronically Signed By: Test User1 (100001)-Director (Finance) On : 20.12.2021 06:15:54 PM'. Another signature is shown for 'Test User2 (100002)-Senior Finance & Accounts Officer On : 20.12.2021 06:26:06 PM'.

- Click on E-sign button.

The screenshot shows the 'File Action' bar with three buttons: 'Save & Close', 'E-Sign', and 'History'. A blue arrow points to the 'E-Sign' button from a text box that says 'Click on E-sign Button'.

- Select Agree/Concur on Select Action.
- Click on Forward button.

Action With eSign

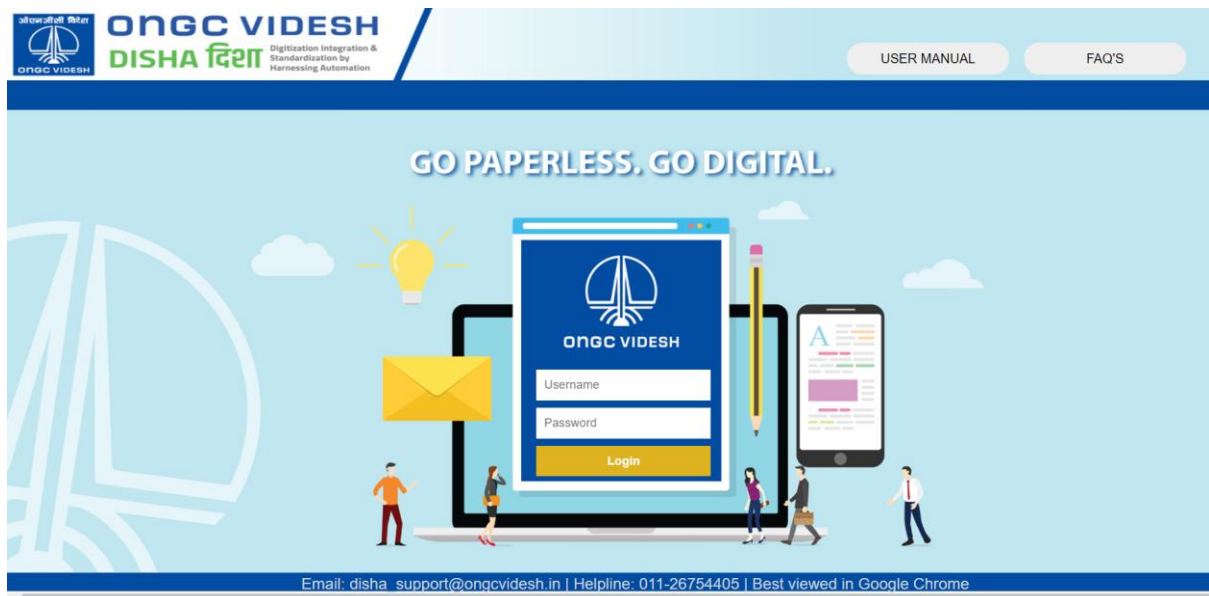
Select Action

☒ Agree / Concur ☐ Return to Initiator ☐ Forward For Review



Click on Forward button

- Task goes to the Approver.
- Login with Approver User.



7.4 Approver Screen.

- Open the task from Inbox.

Test User4
Edit Profile Log Out

INBOX

Enter search text

File Name	File Subject	Stage	Task Name	Task From	Priority	Task receive
DLH/ECC/OMD/1...	Generic BD Exa...	Generic BD File ...	Generic BD File ...	Test User3 (1000...		Dec 20, 20...
DLH/BD/BD/1051...	Test by gautam p...	Approver Part File	Approver Part File	Test User2 (1000...		Dec 16, 20...
DLH/ECC/OMD/1...	Test	Help Desk	Help Desk	Test User1 (1000...		Dec 15, 20...

Task is visible in Inbox

➤ All the sign of users shown in Office Note/Green Sheet.

Generic BD File Approver

File No DLH/ECC/OMD/10008/00003 Creation Date 20-12-2021 Priority Normal Age Of File (in Days) 0 Year 2021-22
Subject Generic BD Example Location Delhi

Meta Data

BDP Clause

Amount : 1,000 USD
BDP : H8 View BDP

SAP T-Code

Select T-Code Get SAP

Office Note / Green Sheet

Print view

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce non imperdiet erat, non trincidunt urna. Mauris iaculis consequat nulla molestie varius. Duis eleifend, tortor vel tempus lobortis, tellus est egestas dolor, sed interdum felis lectus eu lectus. Cras sit amet mattis lectus, at placerat dolor. In ut molestie magna. In nec urna eget metus posuere tempus. Nulla ac sodales quam. Cras diam sapien, rhoncus a mi id, euismod venenatis libero. Phasellus pretium metus ut urna malesuada dapibus. Vestibulum vel tortor sed in massa pulvinar suscipit. Donec posuere felis eu est porta, eget elementum nisi malesuada.

Submitted for approval under BDP clause H8 for USD 1,000.00.

Forwarded & Electronically Signed By :
Test User1 (100001)-Director (Finance)
On : 20.12.2021 06:15:54 PM

Revised ok

Forwarded & Electronically Signed By :
Test User2 (100002)-Senior Finance & Accounts Officer
On : 20.12.2021 06:20:06 PM

Agree ok

Concurred & Electronically Signed By :
Test User3 (100003)-General Manager (Production)
On : 20.12.2021 06:24:38 PM

➤ Click on E-sign button.

File Action

Save & Close E-Sign History

Click on E-sign button

➤ Select Approve on Select Action.

Action With eSign

☐ Urgent

Select Action

☐ Approve ☐ Return to Initiator ☐ Forward For Review

Forward Exit

- Now select Approve & Send to Initiator.
- Click on Forward button.

Action With eSign

☐ Urgent

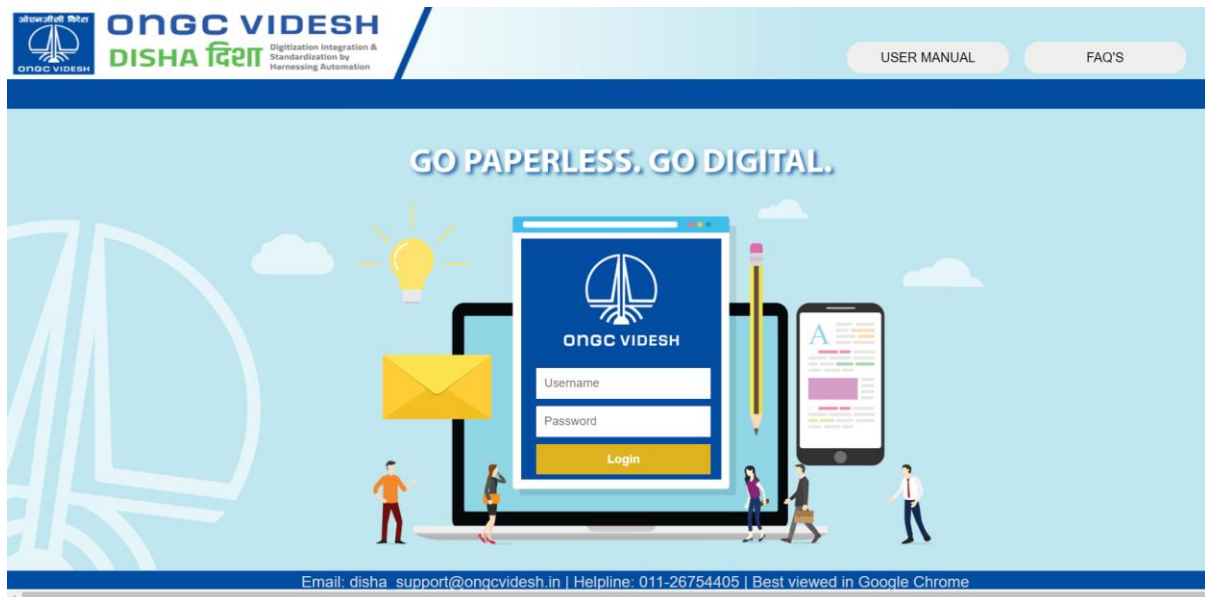
Select Action

☒ Approve & Send To Initiator ☐ Approve & Send To Other User

Back Forward Exit

Click on Forward button

- Task goes to the Initiator.
- Login with InitiatorUser.



7.5 Initiator Screen.

➤ Open the Task from Inbox.

The screenshot shows the "INBOX" screen of the application. On the left, there is a sidebar with the user profile "Test User1" and navigation links for "Dashboards", "Cabinet", and "INBOX". The main area displays a table of tasks. A yellow box highlights the first row of the table, and a blue arrow points to it with the text "Task is Visible in Inbox".

File Name	File Subject	Stage	Task Name	Task From	Priority	Task receive
DLH/ECC/OMD/1...	Generic BD Exa...	Generic BD File I...	Generic BD File I...	Test User4 (1000...		Dec 20, 20...
DLH/ECC/OMD/1...	Generic BD Exa...	Generic BD File I...	Generic BD File I...	Test User4 (1000...		Dec 20, 20...
DLH/ECC/OMD/1...	test	Change in Bank ...	Change in Bank ...			Dec 20, 20...
AMS/PFIN/PFIN/...	Test	Cash and Bank R...	Cash and Bank R...			Dec 20, 20...
DLH/ECC/OMD/1...	Test Additional As					Dec 20, 20...
DLH/ECC/OMD/1...	lovely					Dec 20, 20...
DLH/ECC/OMD/1...	test					Dec 20, 20...

➤ All the sign of users shown in Office Note/Green Sheet.

The screenshot shows the "Generic BD File Initiator" screen. On the left, there is a sidebar with the user profile "Test User1" and navigation links for "Dashboards", "Cabinet", and "INBOX". The main area displays the "Office Note / Green Sheet" section, which contains a list of users and their signatures. A blue arrow points to the list with the text "All the sign of users shown in Office Note/Green Sheet.".

Submitted for approval under BDP clause H8 for USD 1,000.00.

Forwarded & Electronically Signed By :
Test User1 (100001)-Director (Finance)
On : 20.12.2021 06:15:54 PM

Revived ok

Forwarded & Electronically Signed By :
Test User2 (100002)-Senior Finance & Accounts Officer
On : 20.12.2021 06:20:06 PM

Agree ok

Concurred & Electronically Signed By :
Test User3 (100003)-General Manager (Production)
On : 20.12.2021 06:24:38 PM

Approved ok

Approved & Electronically Signed By :
Test User4 (100004)-Company Secretary
On : 20.12.2021 06:28:34 PM

- Click on Send to Cabinet Button.



Click on Send to Cabinet button

- Send File to Cabinet box be open.
- Click on Yes button.

Send File to Cabinet

Are you sure want to send this file to cabinet ?

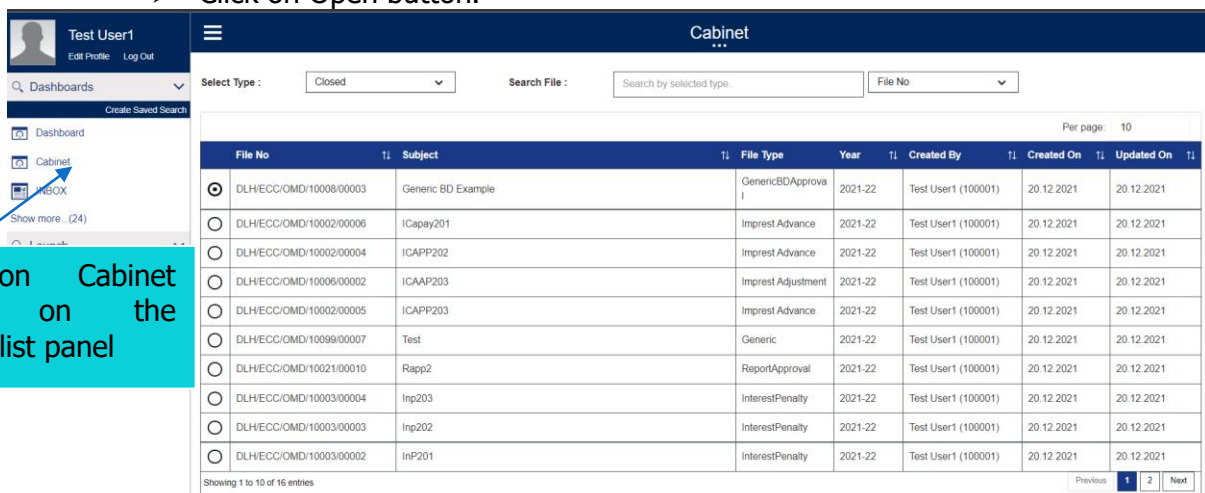


Click on Forward button

- Task goes to the Cabinet of Initiator.

7.6 Cabinet Screen

- Click on Cabinet button on the Process list Panel.
- Select your File in Table.
- Click on Open button.



Click on Cabinet button on the process list panel

Click on Open button.

The screenshot displays the 'Cabinet' application interface. On the left, a sidebar shows the user profile 'Test User1' and navigation options like 'Dashboards', 'Cabinet', and 'INBOX'. The main content area is divided into two panels. The left panel, titled 'Meta Data', contains fields for Location (Delhi), Section (EC Cell), Sub Section (Office of Managing Director), Project (NA), Subject (Generic BD Example), and Priority (Normal). Below this is a 'BDP Clause' section showing 'Amount: 1,000 USD' and 'BDP: H8' with a 'View BDP' button. The right panel, titled 'Office Note / Green Sheet', displays a document titled 'सार्थक पत्र / Working Paper' with a logo and a block of placeholder text. Below the text, it states 'Submitted for approval under BDP clause H8 for USD 1,000.00', 'Forwarded & Electronically Signed By: Test User1 (100001)-Director (Finance)', and 'On: 20.12.2021 06:15:54 PM'. A 'Revised ok' status is also visible.

- Now you can see all the data of user.

7.6.1 Notes Sheet(s)

- In this section click on actions icon to open Notes sheet(s).

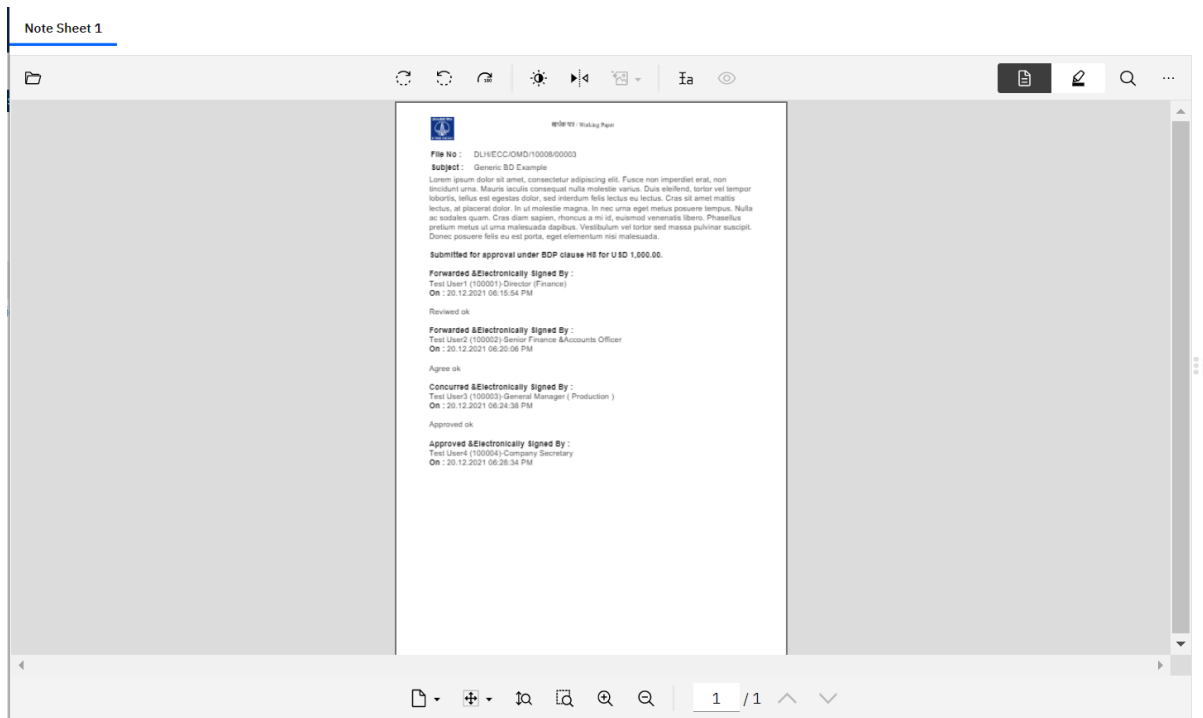
The screenshot shows the 'Cabinet' application interface with the 'Notes Sheet(s)' section open. It features a table with the following data:

Subject	By	Status	Date	Actions
Note Sheet 1	Test User1	Signed	17.12.2021	

Below the table, it indicates 'Showing entry 1 of 1 entries'. Navigation buttons for 'Previous', '1', and 'Next' are present. A yellow box highlights the actions icon in the 'Actions' column, with a blue arrow pointing to a callout box.

- Notes Sheet(s) will open.

View Notes Sheet(s)



7.6.2 Enclosures

- Enclosures send can be viewed and downloaded from Action section (if any).

Enclosures					
#	Description	By	P. No	Date	Action
Showing 0 entries					
					Previous Next

7.6.3 File Workflow

- Select File Workflow using radio selection button.

File Workflow				
	Workflow	Created By	Created On	Updated On
<input type="radio"/>	File Workflow 1	Test User1 (100001)-Senior Geophysicist (Surface)	17.12.2021	17.12.2021
Showing entry 1 of 1 entries				
			Previous	1 Next

- Workflow Members will be shown.

Workflow Members

Member Type	Member Name
Reviewer / Recommender	Test User2 (100002)-Senior Finance & Accounts Officer
Agree / Concurrer	Test User3 (100003)-General Manager (Production)
Approver	Test User4 (100004)-Company Secretary

Exit

7.6.4 File Action

- File Action contains Exit, History, Move to Inbox and Send for Review options.

File Action

Exit

History

Move To Inbox

Send For Review

- Exit is used to exit the opened file.
- History shows the Movement History of the file.
- Move to Inbox will move the file from Cabinet to Inbox.

Movement History

File No :

DLH/ECC/OMD/10008/00003

Subject :

Generic BD Example

			Per page: 10
Date	Stage	From	To
20.12.2021 06:21:35 P M	Generic BD File Initiator	Test User1 (100001)-Director (Finance)	Test User2 (100002)-Senior Finance & Accounts Officer
20.12.2021 06:25:47 P M	Review / Recommend	Test User2 (100002)-Senior Finance & Accounts Officer	Test User3 (100003)-General Manager (Production)
20.12.2021 06:30:20 P M	Agree / Concur	Test User3 (100003)-General Manager (Production)	Test User4 (100004)-Company Secretary
20.12.2021 06:34:15 P M	Approve	Test User4 (100004)-Company Secretary	Test User1 (100001)-Director (Finance)
20.12.2021 06:39:06 P M	Generic BD File Initiator	Test User1 (100001)-Director (Finance)	To Cabinet
Showing 1 to 5 of 5 entries			Previous 1 Next

Close

- Send for Review will send the file for review.
- In order to send the file for review we need to select users and click Forward button.

Forward File For Review

Select Users :

100004-Test User4 (RUS-CFIN)-Company Secretary

Forward

Exit

Click on Forward button

7.7 Outbox Screen

- Click on Outbox button on the Process list Panel.
- Select your File in Table.
- Click on Open button.

Test User1
Edit Profile Log Out

Outbox

From Date : 13 12 2021 To Date : 20 12 2021 Search Filter File : Filter by any field

Per page: 10

File No	Subject	File Type	Priority	Stage	Action	Date
DLH/BD/10524/00003	Test	CAG	Low	Director	Director	20-12-2021 06:40 PM
DLH/ECC/OMD/10008/00003	Generic BD Example	GenericBDApproval	Normal	Generic BD File Initiator	Cabinet	20-12-2021 06:39 PM
DLH/CFIN/OMD/10025/00003	Test 3	TreasuryInvestment	Normal	Review	Review	20-12-2021 06:30 PM
DLH/CFIN/OMD/10025/00002	Test 2	TreasuryInvestment	Normal	Review	Review	20-12-2021 05:58 PM
DLH/ECC/OMD/10002/00006	ICapay201	Imprest Advance	Normal	Advance Payment Process Initiator	Cabinet	20-12-2021 05:08 PM
DLH/ECC/OMD/10002/00004	ICAPP202	Imprest Advance	Normal	Advance Payment Process Initiator	Cabinet	20-12-2021 04:49 PM
DLH/APAC/PRJ/50703/00001	Interest	InterestPenalty	High	Review / Recommend	Review / Recommend	20-12-2021 04:47 PM
DLH/ECC/OMD/10006/00002	ICAAP203	Imprest Adjustment	Normal	Advance Adjustment Process Initiator	Cabinet	20-12-2021 04:45 PM
DLH/PFIN/PFIN/20807/00001	Test Change of Assignment	ChangelnAssignment	Normal	Approve	Approve & Send To Initiator	20-12-2021 04:38 PM
DLH/CSS/SAP/31007/00012	Test Part Case File	ChangelnAssignment	Low	Approve	Approve & Send To Initiator	20-12-2021 04:16 PM

Showing 1 to 10 of 72 entries

Previous 1 3 4 6 8 Next

Open

Click on Open button

➤ This is user Outbox screen.

Test User1
Edit Profile Log Out

Outbox

File No DLH/ECC/OMD/10008/00003 Creation Date 20-12-2021 Priority Normal Age Of File (in Days) 0 Year 2021-22

Subject Generic BD Example Location Delhi

Meta Data

Location Delhi
Section EC Cell
Sub Section Office of Managing Director
Project NA
Subject Generic BD Example
Priority Normal

BDP Clause

Amount: 1,000 USD
BDP: H8 View BDP

Office Note / Green Sheet

सार्थक पत्र / Working Paper

Submitted for approval under BDP clause H8 for USD 1,000.00.

Forwarded & Electronically Signed By :
Test User1 (100001)-Director (Finance)
On : 20 12 2021 06:15:54 PM

Revised ok

Forwarded & Electronically Signed By :

➤ Click on History button.

File Action

Exit History

- Movement History box be open.
- Show all the details of user.
- If you want to close, then click on close button.

Movement History

File No :

DLH/ECC/OMD/10008/00003

Subject :

Generic BD Example

Per page: 10

Date	Stage	From	To
20.12.2021 06:21:35 P M	Generic BD File Initiator	Test User1 (100001)-Director (Finance)	Test User2 (100002)-Senior Finance & Accounts Officer
20.12.2021 06:25:47 P M	Review / Recommend	Test User2 (100002)-Senior Finance & Accounts Officer	Test User3 (100003)-General Manager (Production)
20.12.2021 06:30:20 P M	Agree / Concur	Test User3 (100003)-General Manager (Production)	Test User4 (100004)-Company Secretary
20.12.2021 06:34:15 P M	Approve	Test User4 (100004)-Company Secretary	Test User1 (100001)-Director (Finance)
20.12.2021 06:39:06 P M	Generic BD File Initiator	Test User1 (100001)-Director (Finance)	To Cabinet

Showing 1 to 5 of 5 entries

Previous

1

Next

Close

Click on Close button

-----End of Document-----