



2022

Paperless Office-Offboarding-Transfer-User Manual

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1 Introduction

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

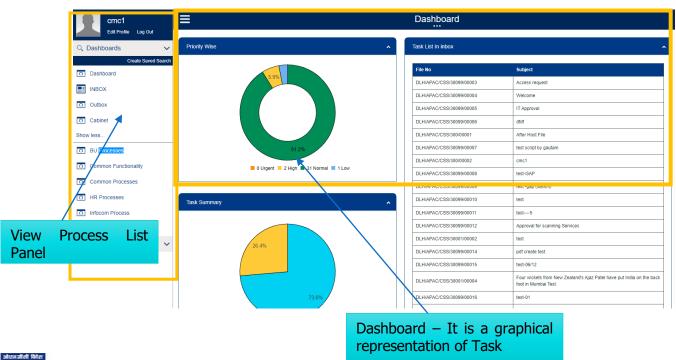
2 Login in the Paperless office:

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



3 Login Screen Overview:

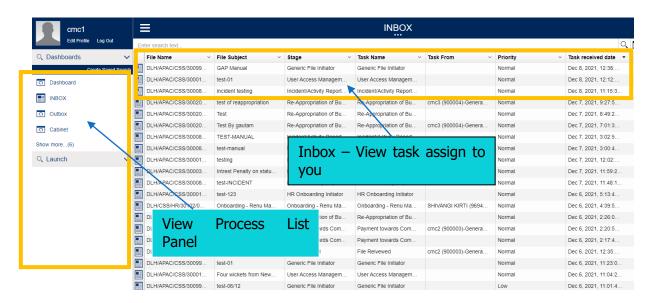
Dashboard screen







Inbox Screen



4 How to run the Common Processes

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

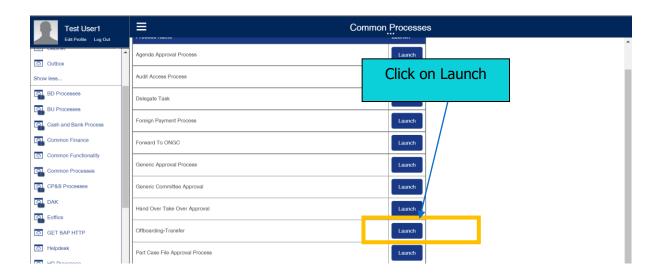






5 Offboarding-Transfer Launch:

Click on Launch button.



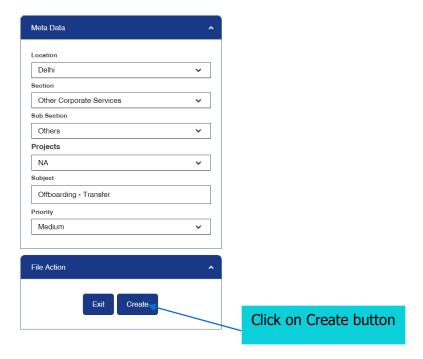
- Meta Data and File Action Panel will open.
- Enter the entire metadata field displayed on the Create file screen. Note: Location, Section, Sub section, Priority will show repopulated based in the User login profile. If users want to change the repopulated field, he/she can select other value form the dropdown.
- > Select Projects 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.



Click on Yes button.



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

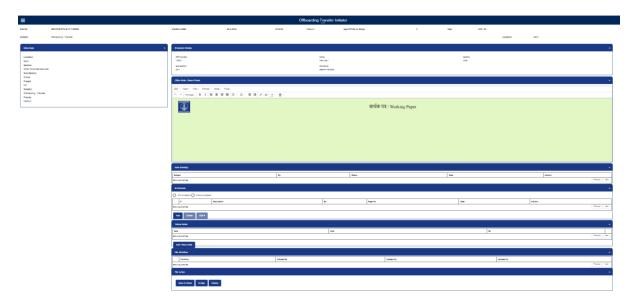
Note: File No convention based on Location/Sec/Sub Sec/File tag/File No Series e.g., ISR/OCS/OTH/31411/00005





6 Initiator Screen

Following Screen Opens in Full View:



6.1 Form Information

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

Employee Details – In this CPF Number, Name, Section, Sub Section and Discipline of the initiator employee are shown.

Office Note/ Green Sheet – User can type the contents of the note sheet.

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 form 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.





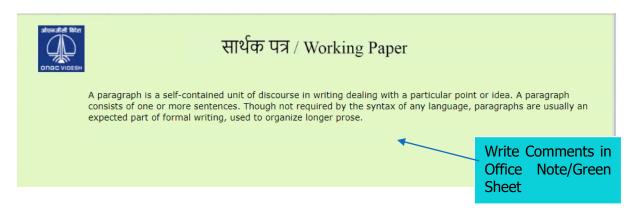
6.2 Employee Details

➤ In this CPF Number, Name, Section, Sub Section and Discipline of the initiator employee are shown.



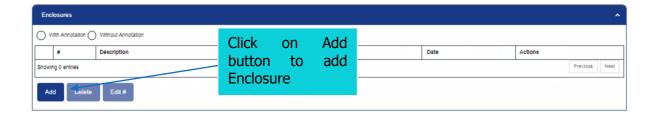
6.3 Add Office Note/ Green Sheet

Write Comments in Office note/Green Sheet.



6.4 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.



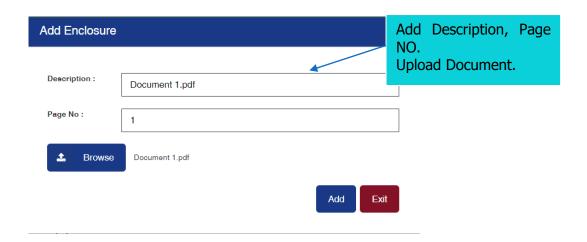
- Click on Add Button of Enclosure.
- Fill all the details of box, upload document and then click on Add button.



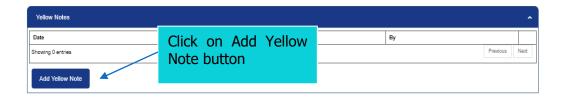


(Description is mandatory field)

- Click on Add Button.
- > You can Delete your enclosure, by selecting it and clicking delete button.
- > You can Edit the Sr. No. of your enclosure using Edit# button.



6.5 Add Yellow Note



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



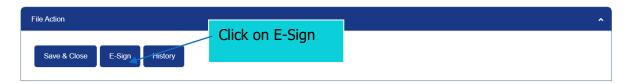




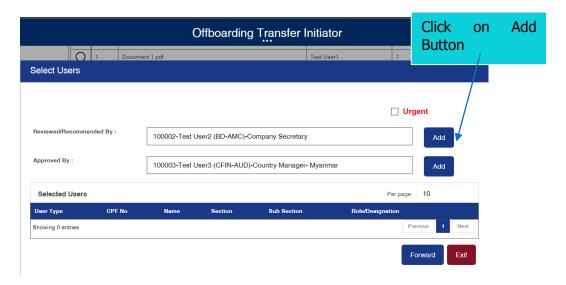
7 Sending a File

7.1 Initiator Screen

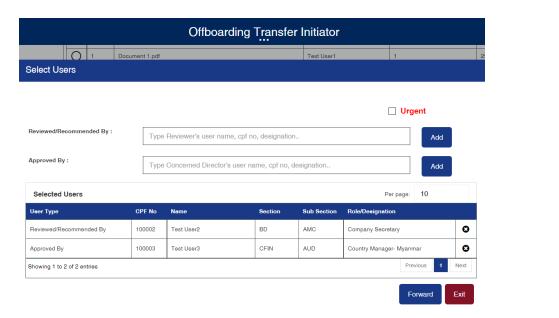
Click on E-sign button.
 Note: On click on save button. Noting will saved as Draft.



- > Select the user(s) of Reviewed/Recommended By (Optional) and Approved By (Mandatory).
- Click on Add Button.



- All the users are now added to the selected users list.
- > Click on Forward button.





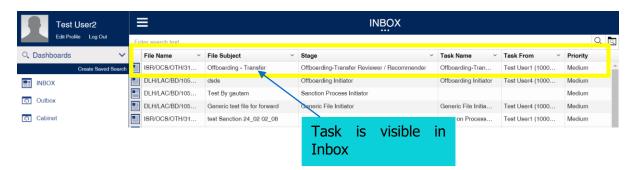


- Now task go to the Reviewer/Recommender.
- > Login to Reviewer/ Recommender user.

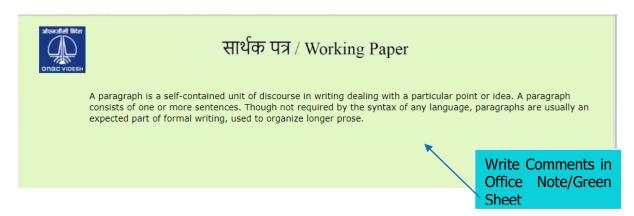


7.2 Reviewer/Recommender Screen

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



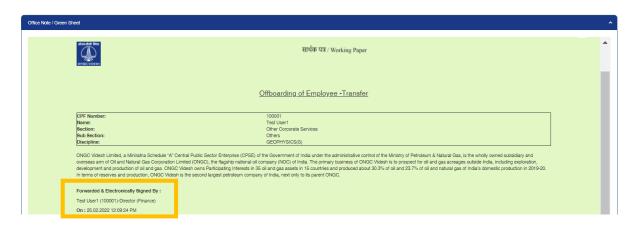
Write Comments in Office note/Green Sheet .







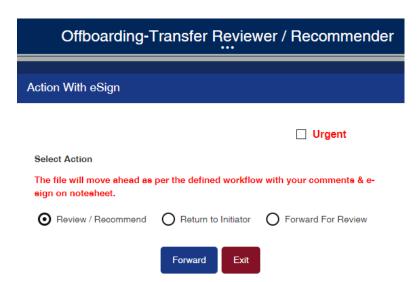
> All the sign of users shown in Office Note.



Click on E-sign button.



- > If you select Return to Initiator, file will be returned to initiator.
- > If you select Forward for Review, file will go to the selected user.
- Select Review/Recommend.
- Click on forward button.





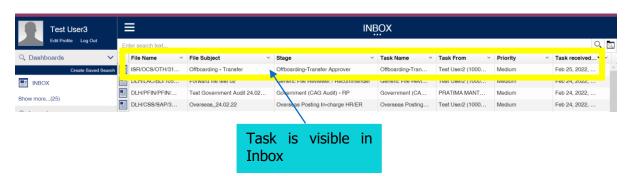


- Task goes to the Approver.
- > Login with Approver User.

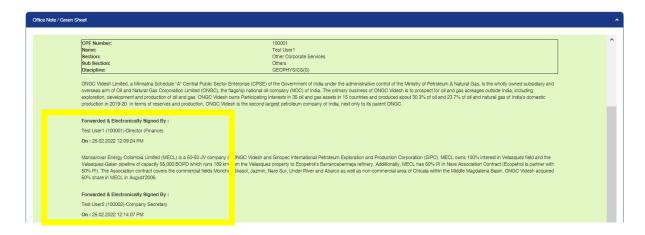


7.3 Approver Screen.

Open the task from Inbox.



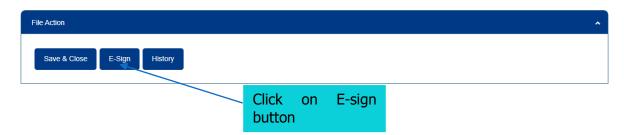
> All the sign of users shown in Office Note/Green Sheet.



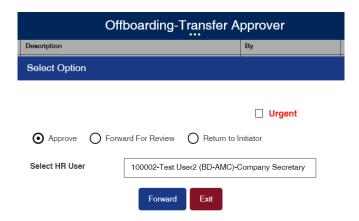




Click on E-sign button.



- ➤ If you select Return to Initiator, file will be returned to initiator.
- > If you select Forward for Review, file will go to the selected user.
- > Select Approve.
- > Select HR User.
- > Click on forward button.



- > Task goes to the HR.
- Login with HR User.





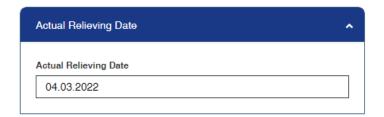


7.4 HR User

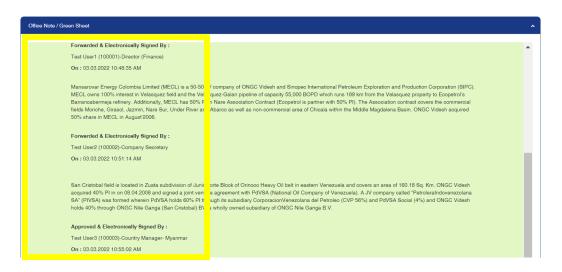
Open the task from Inbox.



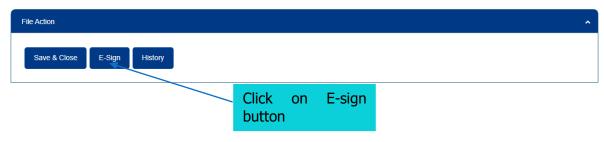
> Enter Actual Relieving Date.



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



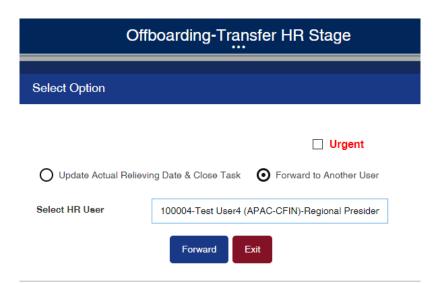
Click on E-sign button.



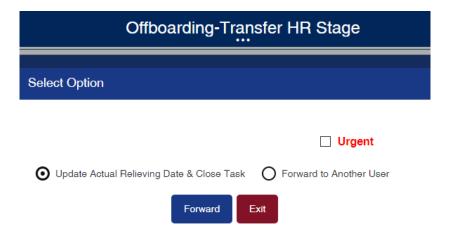




> If you select Forward to another user, you have to select HR user. File will be forwarded to selected user.



- > Select Update Actual Relieving Date & Close Task.
- Click on forward button.



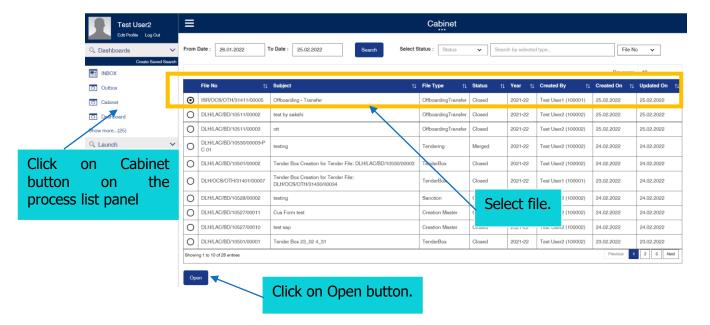
Now Task can be seen in HR Cabinet.





7.5 HR Cabinet Screen

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



Now you can see all the data of user.



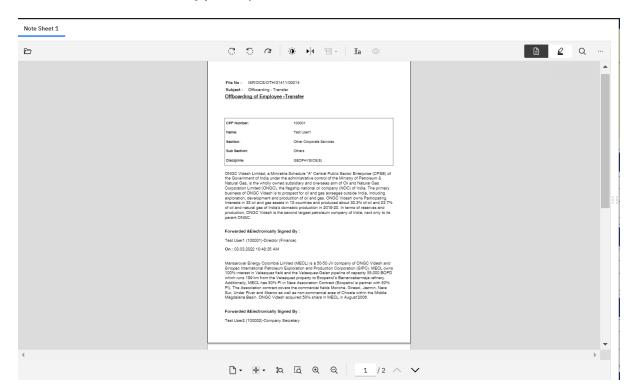




➤ In Notes Sheet(s) section click on viewer icon to open Notes sheet(s).



Notes Sheet(s) will open.



> Enclosures send can be viewed and downloaded.







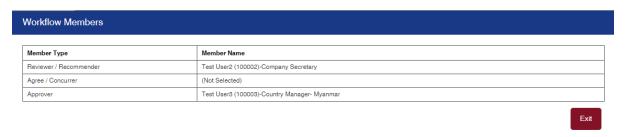
> Yellow notes can be seen.



> Click on File Workflow.



Workflow Members will be shown.



> File Action contains Exit, History, Send for Review and Send For NA options.



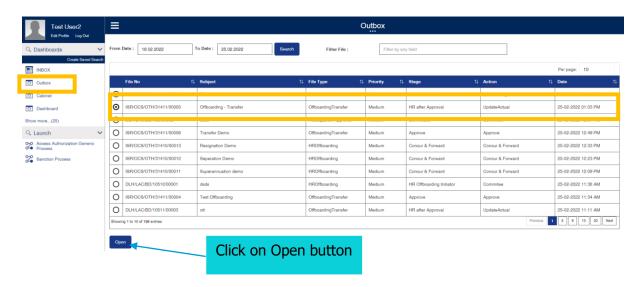
- > Exit is used to exit the opened file.
- > History shows the Movement History of the file.
- > Send for Review will send the file for review to selected user.
- > If you want to send the file for Necessary Action (NA). Then click on Send For NA button. Select the user(s) and click on Add button.





7.6 HR Outbox Screen

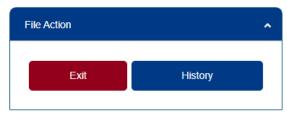
- > Click on Outbox button on the Process list Panel.
- Select your File in Table.
- Click on Open button.



> This is user Outbox screen.



> Click on History button.

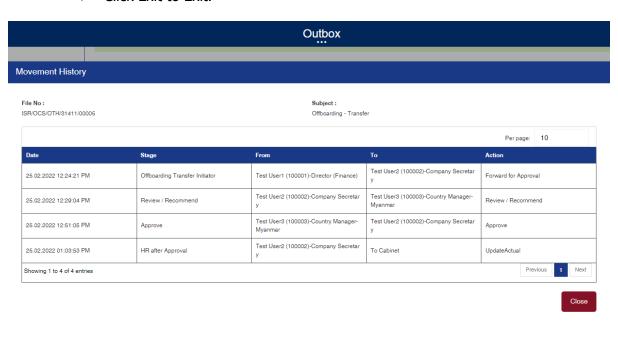


- Movement History box will be opened.
- > It Shows all the details of user.
- > If you want to close history, then click on close button.





Click Exit to Exit.



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