



2022

Paperless Office-Create File – User Manual

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1 Introduction

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

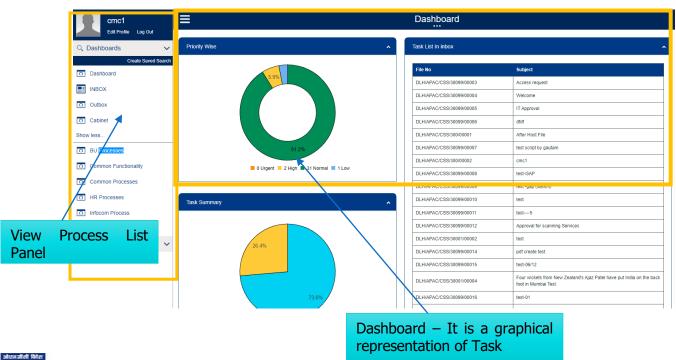
2 Login in the Paperless office:

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



3 Login Screen Overview:

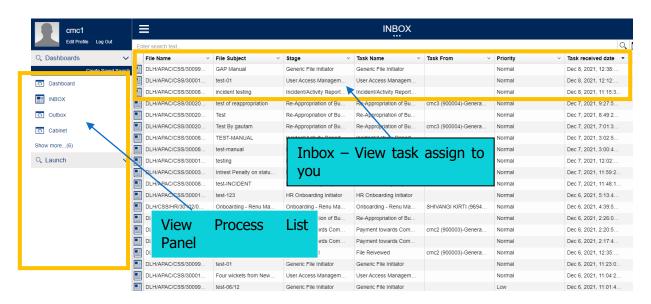
Dashboard screen







Inbox Screen

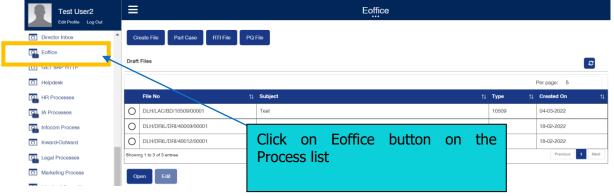


4 How to run the Eoffice

Click on Eoffice.

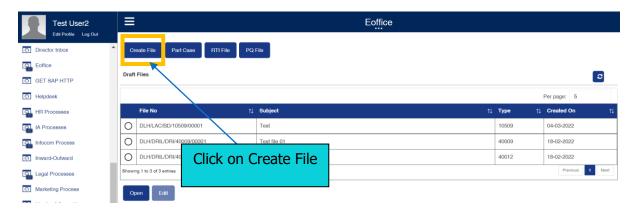
Eoffice Page displayed. List of Processes should be displayed. Process name with

Launch button displays in table.



5 Create File Launch

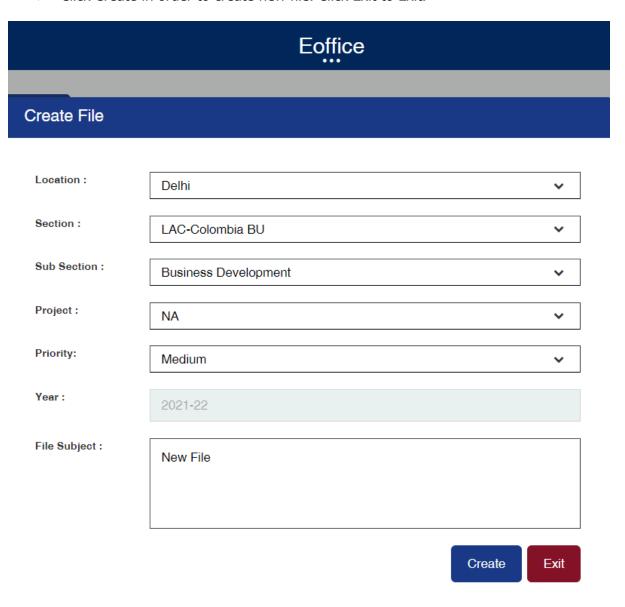
Click on Create File button.







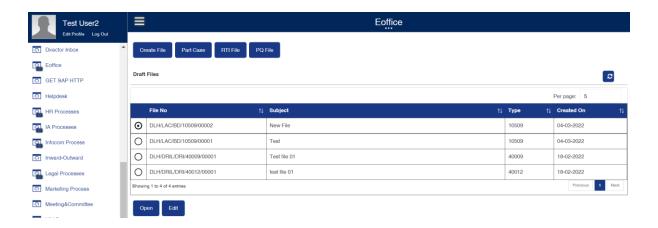
- Create File Panel will open.
- > Enter the entire Create File fields displayed on the screen. Note: Location, Section, Sub section, Priority will show repopulated based in the User login profile. If users want to change the repopulated field, he/she can select other value form the dropdown.
- > Select Project from the dropdown.
- Year is preselected.
- > In the File Subject section enter the name of the file to be created.
- > Click Create in order to create new file. Click Exit to Exit.



- Click on Create button.
- > File is created.
- > Select the file and click open.





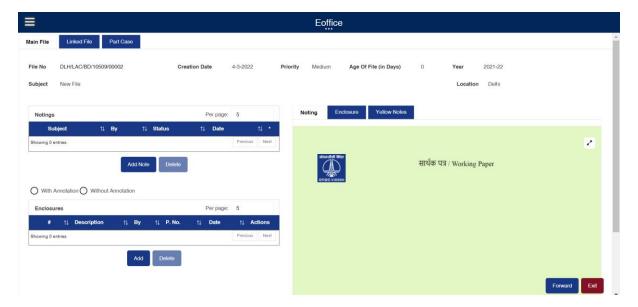


Based on data entered at the time of file Selected/Entered, Unique File No get Created.

Note: File No convention based on Location/Sec/Sub Sec/File tag/File No Series e.g., DLH/LAC/BD/10509/00002

6 Initiator Screen

Following Screen Opens in Full View:







6.1 Form Information

Main File — It shows the File no., Creation date, Priority, Age of File(In days), Year, Subject and Location.

Notings – User can create the note by clicking on Add note button.

Enclosures – 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.

Linked File – In it select file to be linked with the main file.

Part Case – It shows main file part case files.

Forward – It sends the file to selected user for review/approval.

Exit – It is used to exit the file.

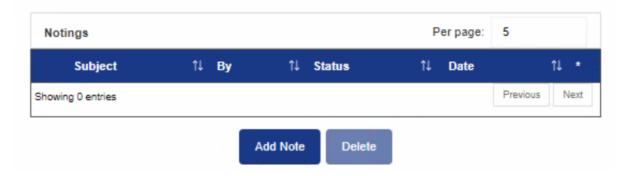
6.2 Main File

> It shows the File no., Creation date, Priority, Age of File(In days), Year, Subject and Location.



6.3 Notings

User can create the note by clicking on Add note button.

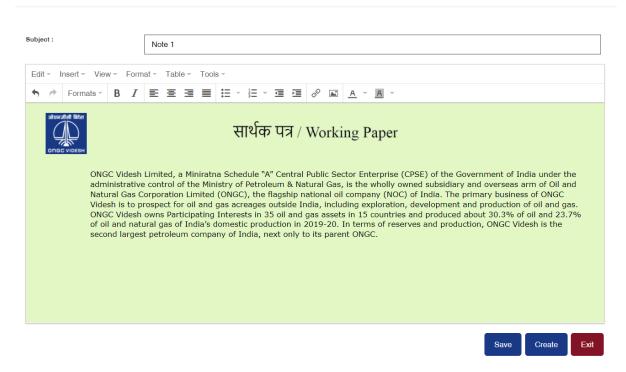




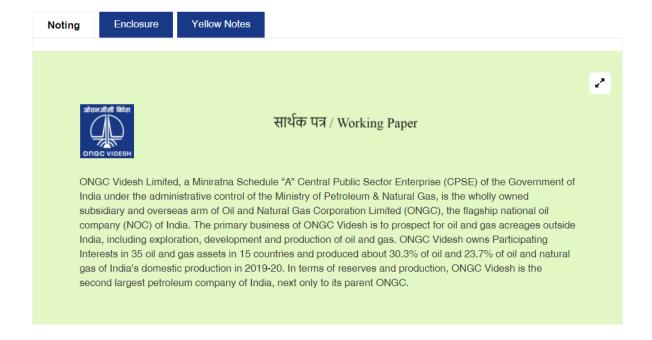


- Enter Subject name.
- Write note contents.
- Click on Create button to create noting.

Create Note In System



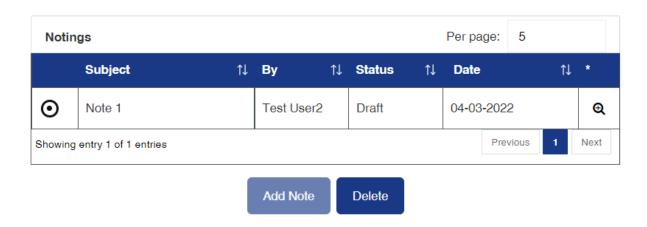
Noting is shown in noting tab.





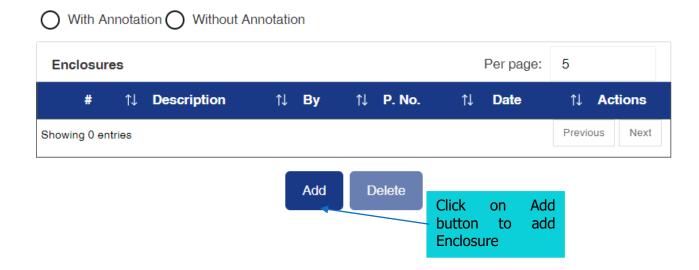


> If you want to delete note then select the note and click on delete button.



6.4 Add Enclosure

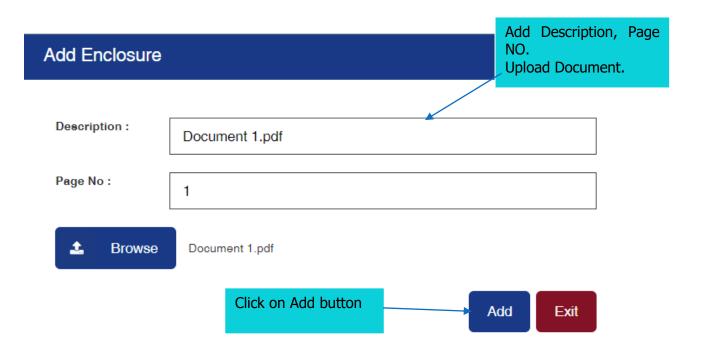
- > User can view the document with or without annotation.
- > User can do the annotation on the enclosure after opening the enclosure in Preview Windows.
- > Select the option in Enclosure section to open the document with annotation or without annotation
- > Select the document after selection view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



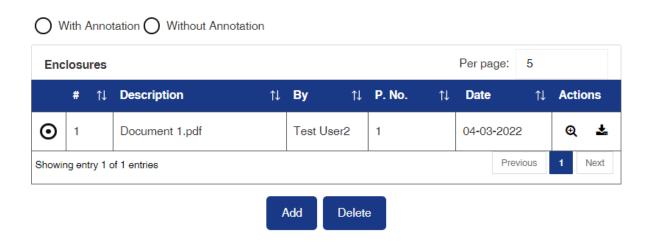
- > Click on Add Button of Enclosure.
- Fill all the details of box, upload document and then click on Add button.
 (Description is mandatory field)
- > Click on Add Button.







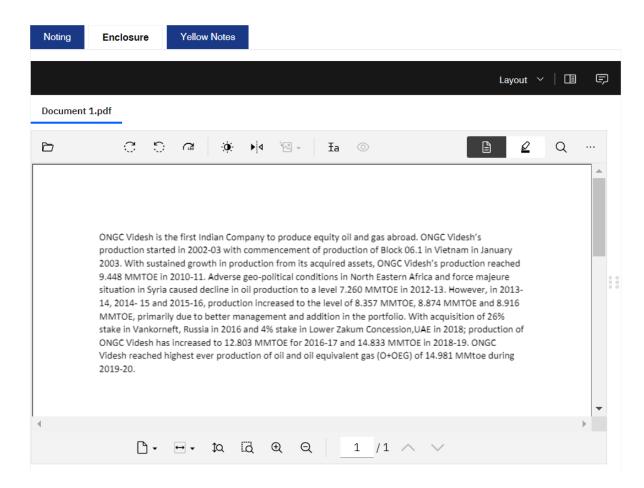
You can Delete your enclosure by selecting enclosure and click on delete button.







> Select enclosure and click on enclosure tab to view enclosure.



6.5 Add Yellow Note

> Click on Add Yellow Note button of Yellow Notes.



- > Fill the box of yellow note.
- Click on Add Button.





Add Yellow Note

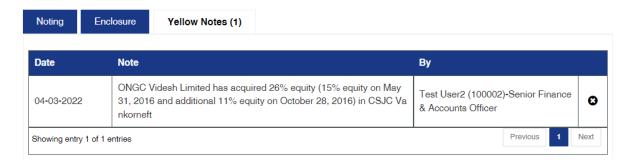
Yellow Note:

ONGC Videsh Limited has acquired 26% equity (15% equity on May 31, 2016 and additional 11% equity on October 28, 2016) in CSJC Vankorneft

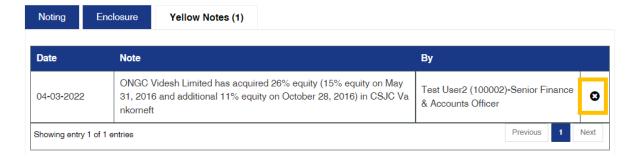
Type Yellow Note and click on Add button



> Yellow notes are added.



Click on x button if you want to delete yellow notes.







6.6 Linked File

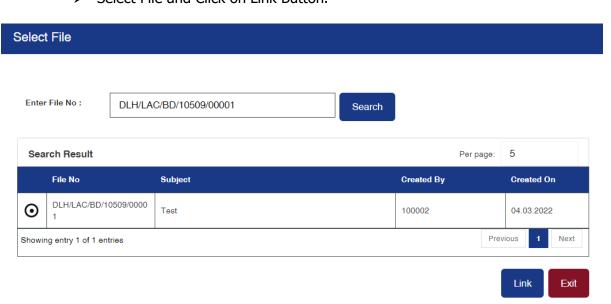
- > In it select file to be linked with the main file.
- > Click on "Select File to Link" Button.



> Enter File No. of file to be linked and click on Search Button.



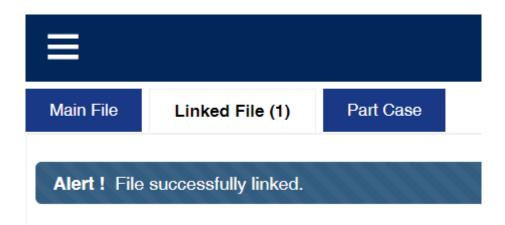
> Select File and Click on Link Button.



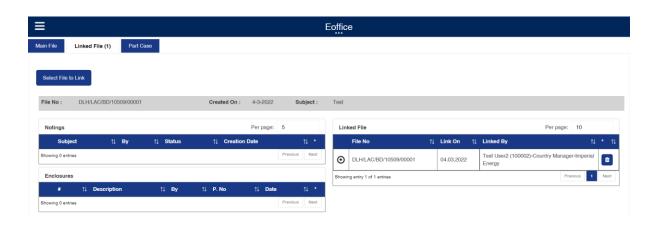




> Number of files linked will be shown in bracket, as shown below here we had linked one file.

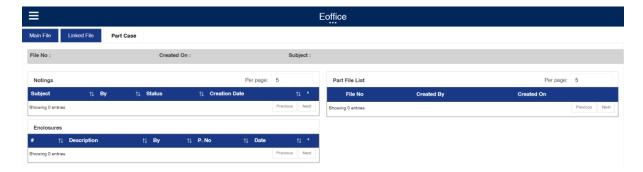


➤ Linked file can be selected and its Notings and Enclosure can be seen.



6.7 Part Case

- > It shows main file part case files.
- > Part Case file can be selected and its Notings and Enclosure can be seen.







6.8 Exit

- > It is used to exit the file.
- > Click on Exit button to exit file.



6.9 Forward

- > It sends the file to selected user for review / approval.
- > Click on Forward button.



> Select Role from Dropdown.



Select Forward Type



Select Forward To

Forward To:







- Select Users
- > Click on Add Button.



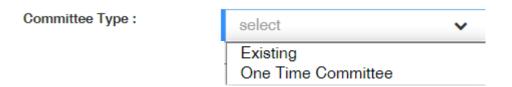
> Selected Users are shown in Selected users list.



> Select user and click on **UP/DOWN Arrow** to change position of user in file workflow.



> Select Committee type.



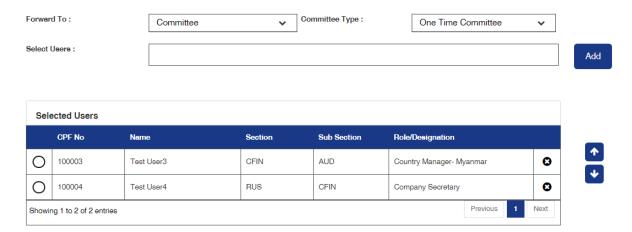
- > Select Committee users.
- > Click on Add button.



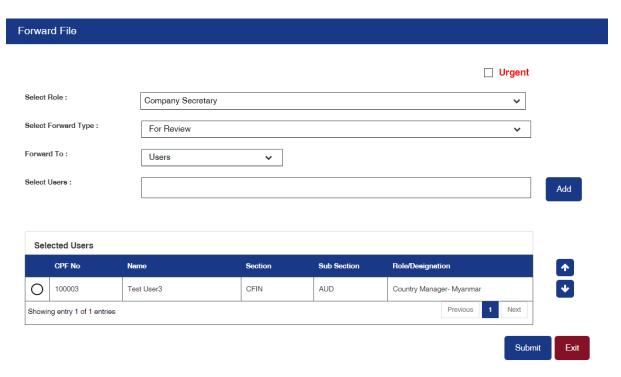




> Selected Users are shown in Selected users list.



> Let us send file for Review to selected user.



> File Successfully send for Review to selected user.



File DLH/LAC/BD/10509/00002 has been successfully submitted.





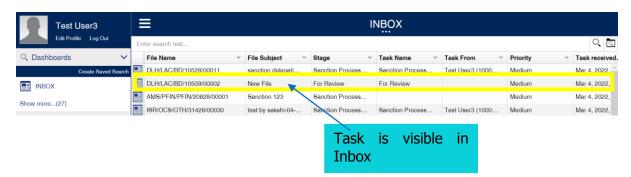


- The file is sent to Reviewer.
- Login to Reviewer user.



7 Reviewer Screen

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



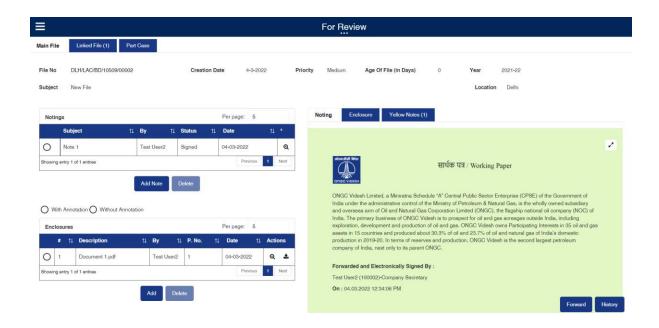
> All the sign of the user are shown in noting.







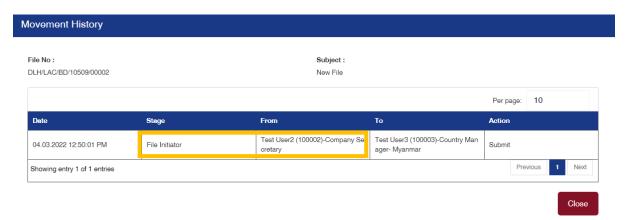
➤ All the noting, enclosures, yellow notes and linked files can be seen.



> Click on History button to view Movement History.



- Note- Reviewer can forward the file to another user which can again review the file and the review process continues until the file is reached to the initiator.
- > File Initiator user details are available in History.
- > Click on History button.



> Select the Initiator user while forwarding the file to complete process.





Click on Forward Button to forward the file.



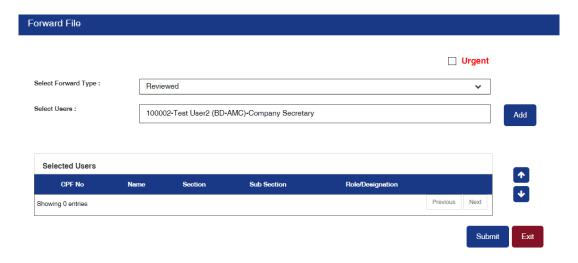
- Reviewer can write the review in the space provided.
- Click on next to forward the file.



> Select Forward type from the dropdown.



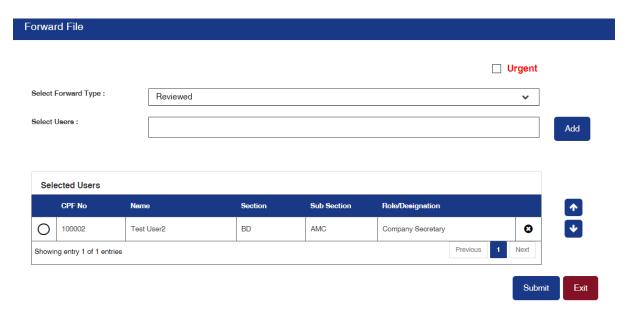
- > Select Forward type as Reviewed from the dropdown.
- > Select User and click on Add button.







- Selected user is shown in selected users list.
- > Click on Submit button.



- > The file is sent to Initiator.
- Login to Initiator user.





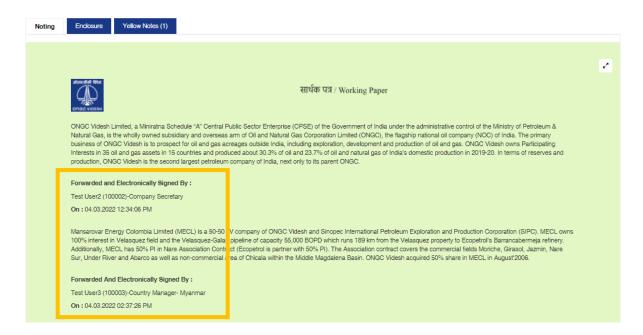


8 Initiator Screen

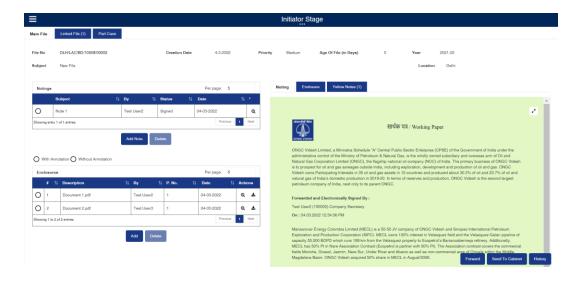
- > Task shown in Inbox.
- Now open the task.



> All the sign of the user are shown in noting.



➤ All the noting, enclosures, yellow notes and linked files can be seen.



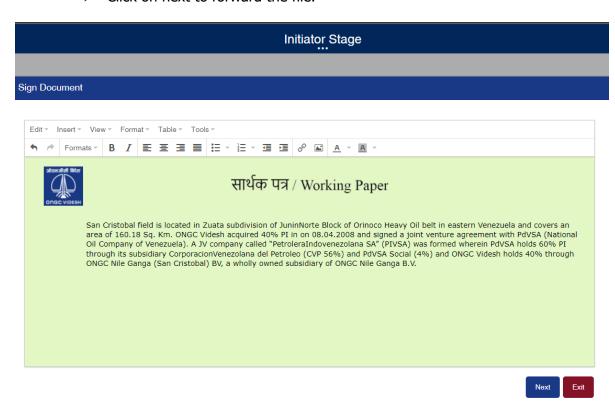




- Click on History button to view Movement History.
- Click on Send To Cabinet Button to send file to Cabinet.
- Click on Forward button.



- Initiator can write in the space provided.
- Click on next to forward the file.



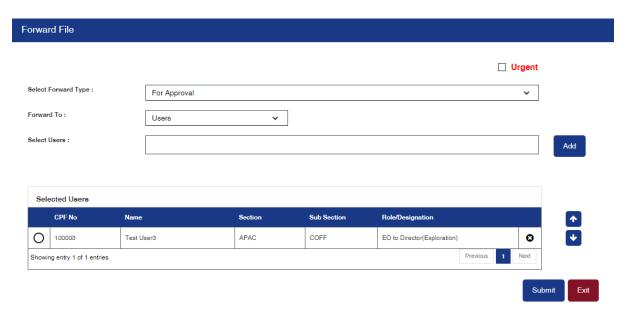
- > Select Forward type as approval from the dropdown.
- > Select Forward to "users" from the dropdown.
- > You can also select Forward to Committee.
- > Select User and click on Add button.







- Selected user is shown in selected users list.
- > Click on Submit button.



- > The file is sent to Approver.
- Login to Approver user.

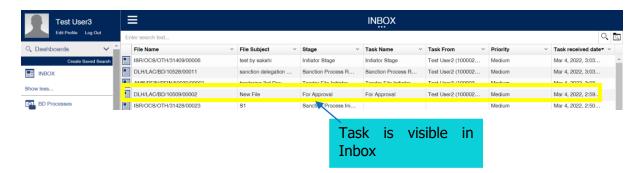






9 Approver Screen

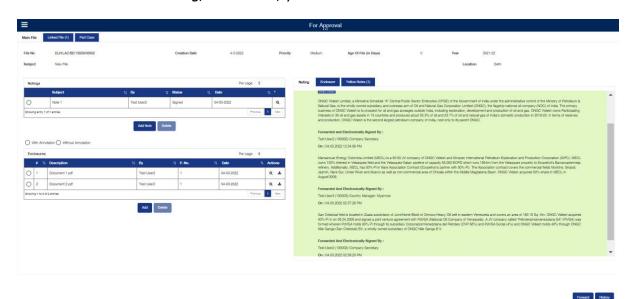
- > Task shown in Inbox.
- Now open the task.



> All the sign of the user are shown in noting.



> All the noting, enclosures, yellow notes and linked files can be seen.



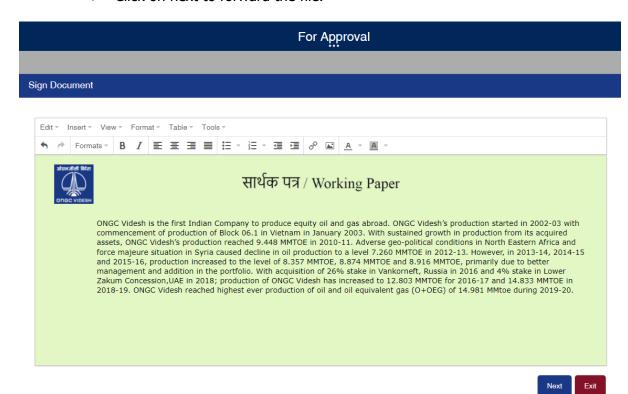




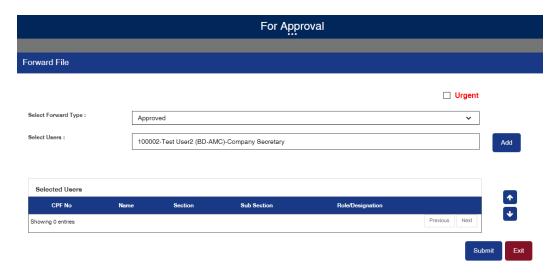
- Click on History button to view Movement History.
- > Click on Forward button.



- User can write in the space provided.
- > Click on next to forward the file.



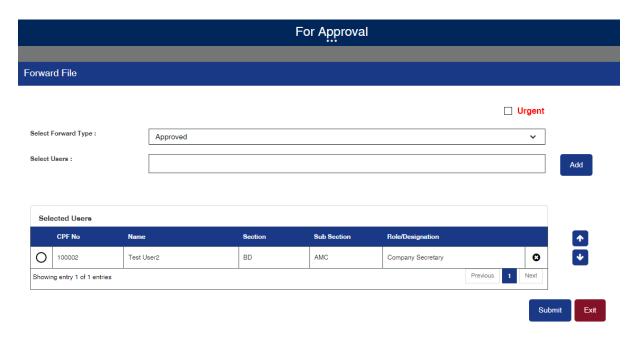
- Select Forward type as approved from the dropdown.
- > Select User and click on Add button.







- Selected user is shown in selected users list.
- > Click on Submit button.



- > The file is sent to Initiator.
- > Login to Initiator user.





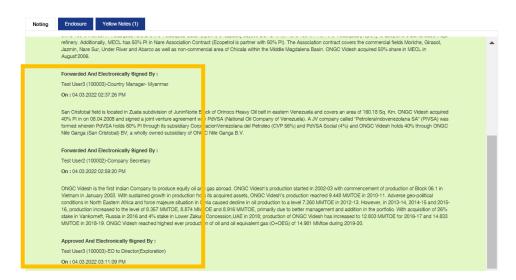


10 Initiator Screen

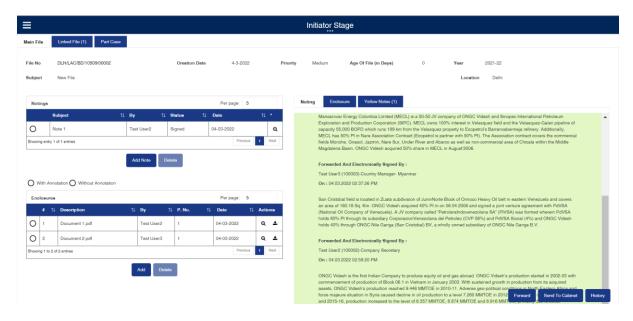
- Task shown in Inbox.
- Now open the task.



> All the sign of the user are shown in noting.



➤ All the noting, enclosures, yellow notes and linked files can be seen.







- Click on History button to view Movement History.
- Click on Forward button to further forward the file for Review/Approval.
- Click on Send To Cabinet button.



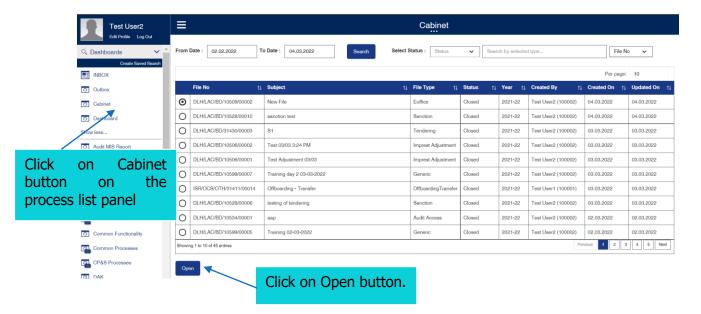
> Click yes button.



> File will be Send to cabinet.

10.1 Cabinet Screen

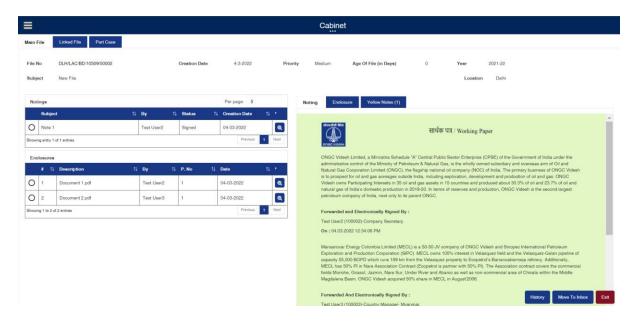
- Click on Cabinet button on the Process list Panel.
- Select your File in Table.
- > Click on Open button.







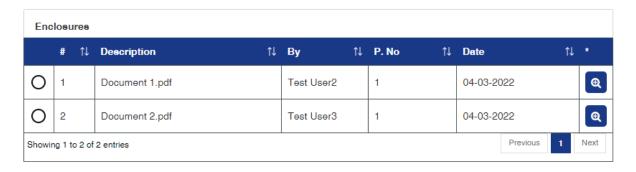
Now you can see all the data.



> All the Notings can be seen.



> All the Enclosures can be seen.



Yellow notes can be seen.





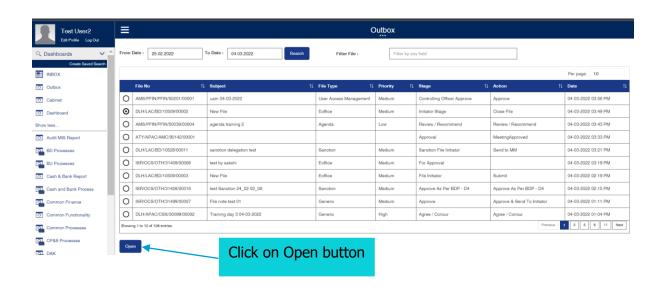


- History is used to see file movement history.
- Move to Inbox is used to move file to inbox.
- Exit is used to exit the file.



10.2 Outbox Screen

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



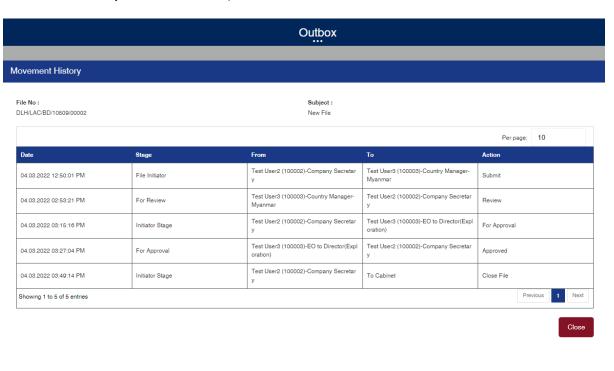
> This is user Outbox screen.







- > Click on History button.
- > Movement History box will be open.
- > If you want to close, then click on close button.



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



