Paperless Office
Generic Approval Process – User Manual

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Document Control

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Table of Contents

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

View Process List Panel
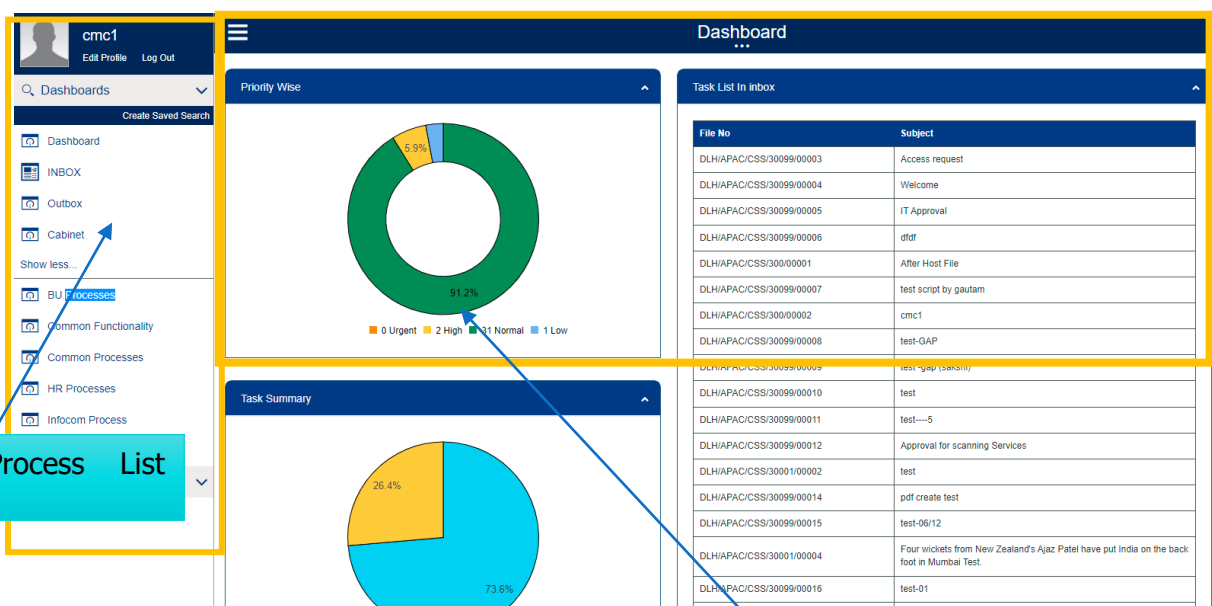
Dashboard – It is a graphical representation of Task

- Inbox Screen

4   How to run the Generic Approval Process

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

5   Generic Approval Process Launch:

➢ 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)**
➢ Click on Create button of File Action panel.

Click on Create button.

➢ Confirmation Box displayed with "Yes" or No" Option.
➢ Click on Yes button.

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.eg. DLH/APAC/CSS/30099/00018)

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 and priority.

BDP Clause – The Applicable BDP Clause can be entered here.

View BDP Button– On click of this button, the BDP Document will open at the selected BDP Clause page.

SAP T-Code –.User can enter the specific SAP T-code for any transaction to be done while working on the File.

Get SAP Button – SAP login screen will open and once the user authenticates himself/herself, SAP will open the selected T-code page for transaction.

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

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.

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.

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   Fill BDP Clause

> ➢ Enter Amount according to BDP Clause.
> ➢ Select BDP.
> ➢ Click on View BDP.

BDP Clause

Enter Amount

Amount | Currency
9,000.00 | INR ⌄

Select BDP Clause

Select BDP
D5 | View BDP

> ➢ BDP Screen opens as shown:

6.3 Add SAP T-Code

> ➢ Select SAP T-Code.
> ➢ Click on Get SAP Button.

➢ This is the View of SAP NetWeaver.
➢ Enter Sap User id and Password and click on Log on .

6.4 Add Office Note/ Green Sheet

➢ Write Comments in Office note/Green Sheet.

6.5 Add Enclosure(Optional)

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

- ➢ Click on Add Button of Enclosure.
- ➢ Fill the all detail 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.

6.6   Add Yellow Note(Optional)

- ➢ 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 use Reviewed/Recommended By (Optional), Agreed/Concurred By (Optional) and Approved By (Mandatory).
- ➢ Click on Add Button.

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

7.2   Reviewed/Recommended By Screen

➢ Login with Reviewed/Recommended By User id .

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

➢ Write Comments in Office note/Green Sheet .

Write Comments in Office Note/Green Sheet

➢ Verify the comments in Office Note/Green Sheet
➢ Click on E-sign button.

Click on E-Sign

- Select Review/Recommended on Select Access.
- 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.
- Click on Forward button.
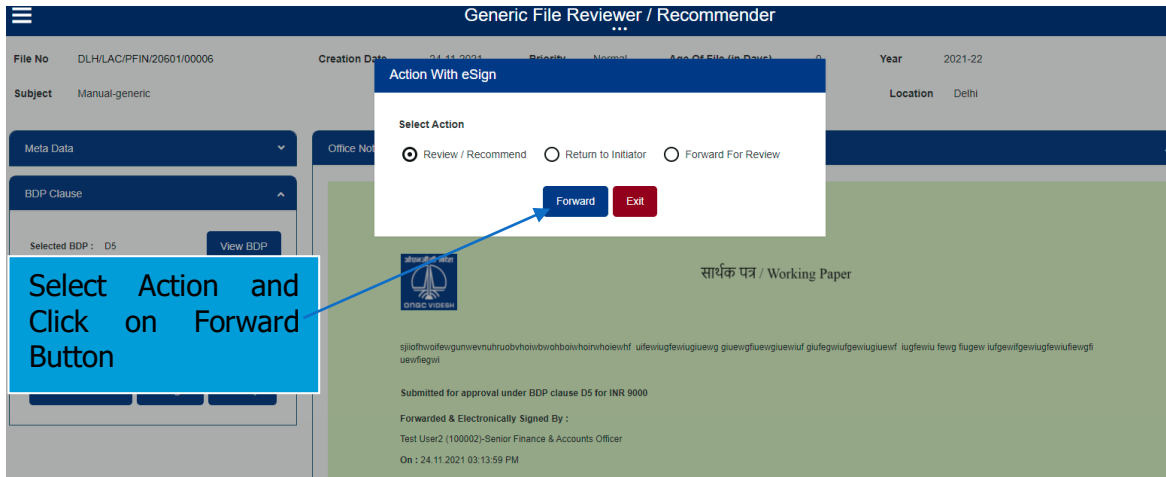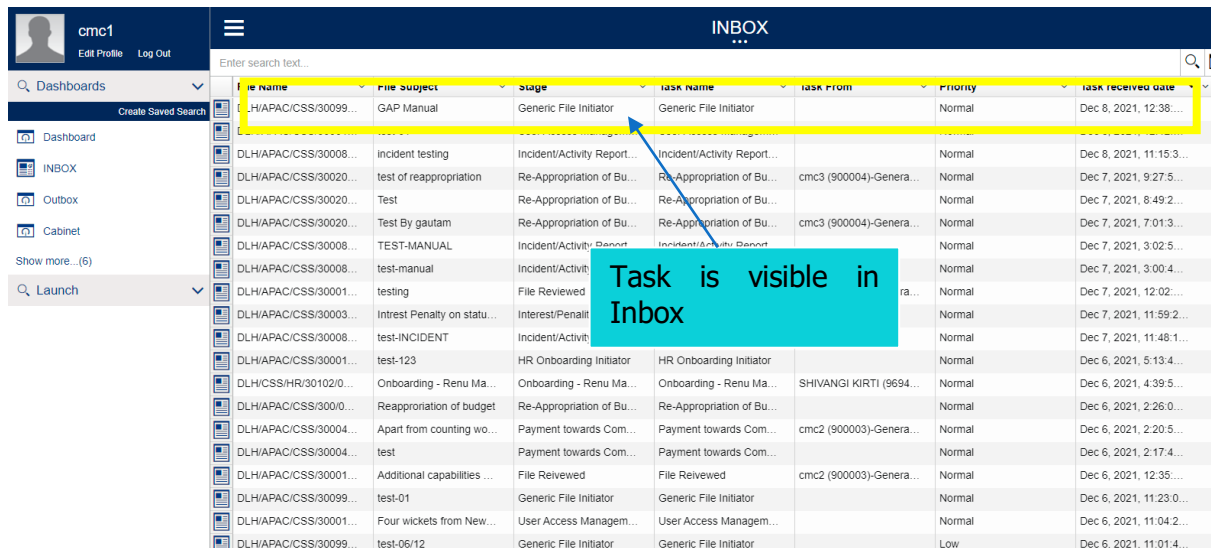
- Task goes to the Agree/Concurrer.
- Login with Concurred by User.

7.3   Agree/Concurrer Screen (Optional)

➢ Open the task from Inbox.

Task is visible in Inbox

➢ Write Comments in Office note/Green Sheet .

Write Comments in Office Note/Green Sheet

➢ All the sign of user shown in office note.
➢ Click on E-sign button.

Click on E-sign Button

- ➢ Select Agree/Concur on Select Access.
- ➢ Click on Forward button.
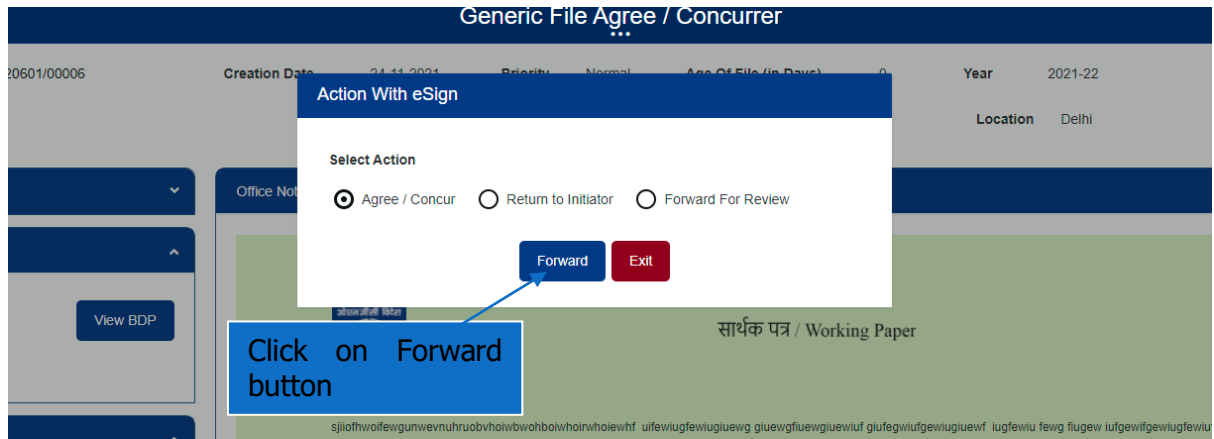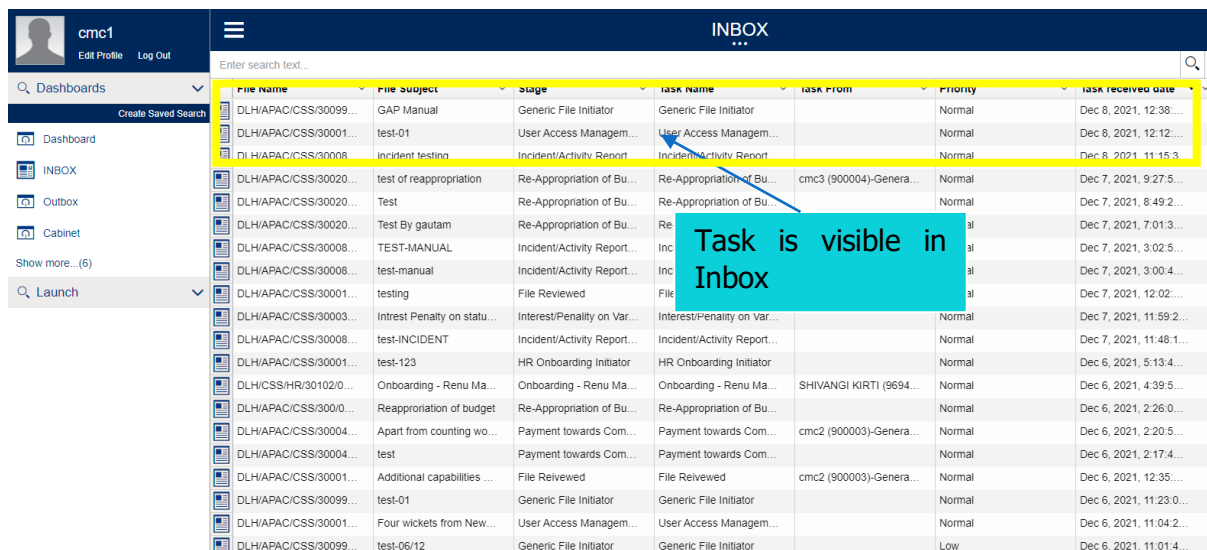
- ➢ Task goes to the Approver.
- ➢ Login with Approver User.
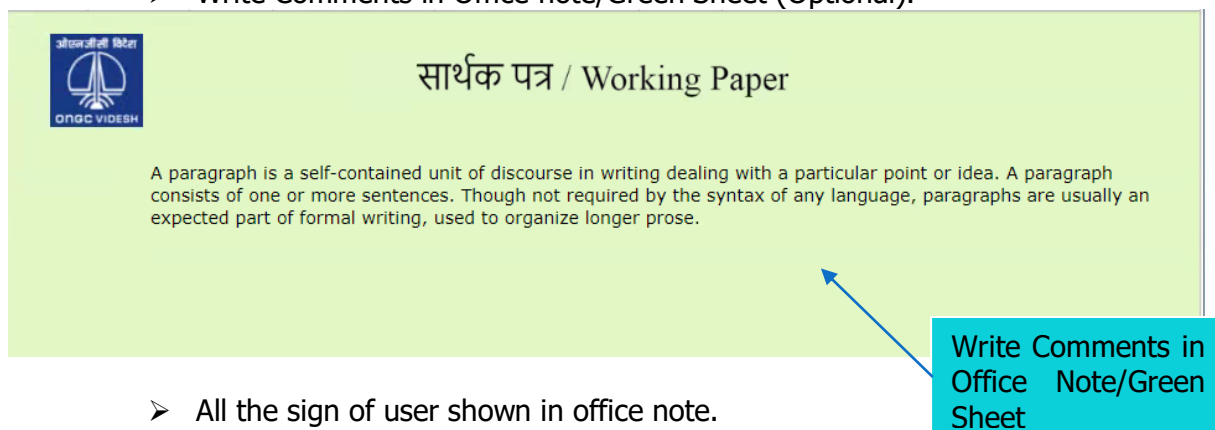
7.4 Approver Screen

➢ Open the task from Inbox.

➢ Write Comments in Office note/Green Sheet (Optional).

➢ All the sign of user shown in office note.
➢ Click on E-sign button.

➢ Select Approver on Select Action.
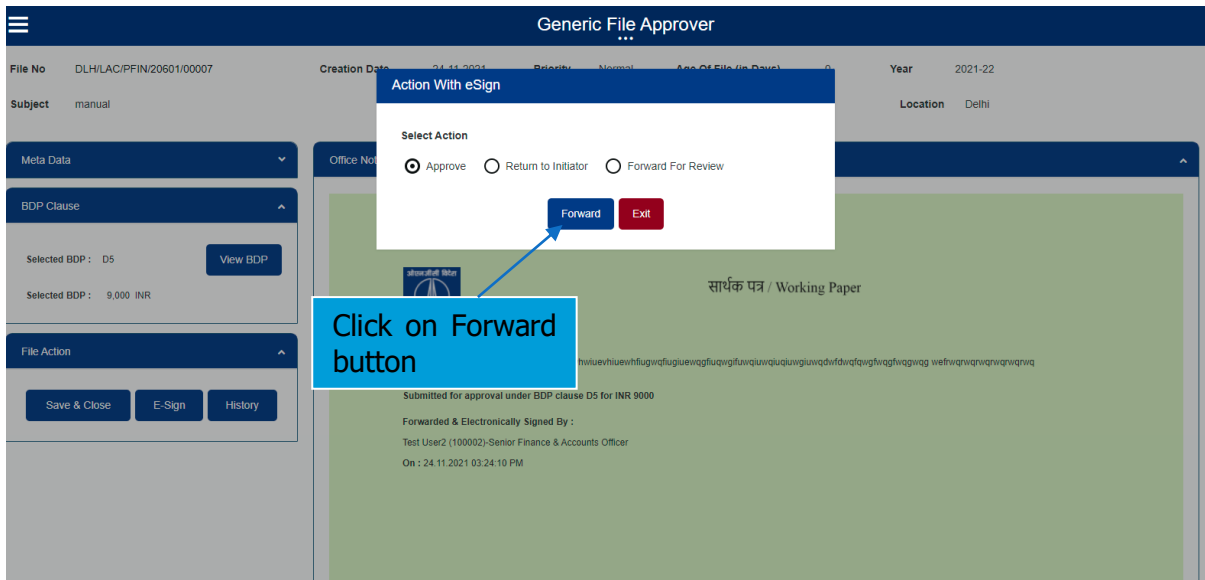
Note: When click on approve button there are two options to send a file.

1. Approve send to Initiator. - File will be approved and go to Initiator.

2. Approve and send to other user. - File will be approved and go to the selected user.

➢ Select Approve and send to Initiator.
➢ Click on Forward button.
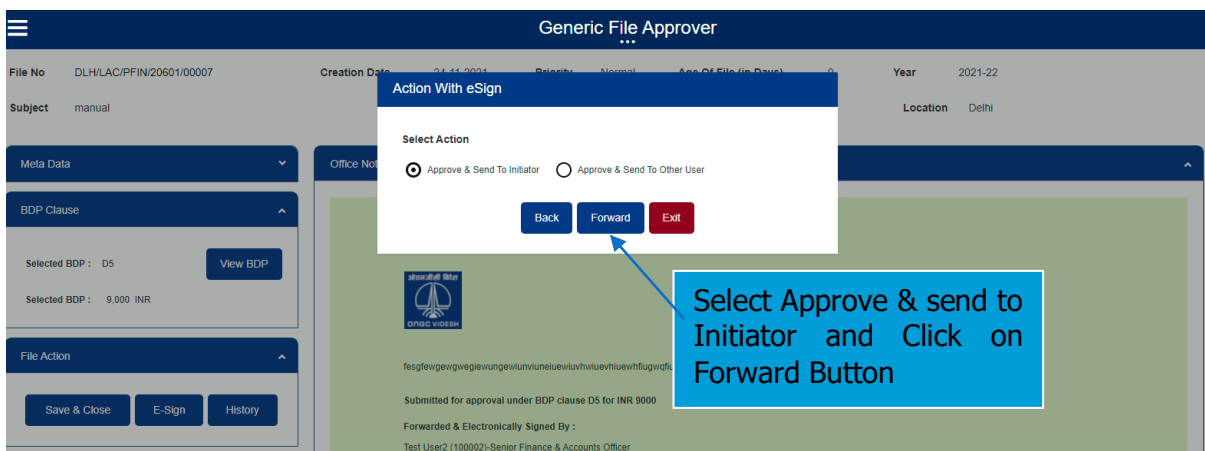
- Task goes to the Initiator.
  (Note: If user want to send file to other user then click on approve and Send to Other User)
- Login with Initiator User.

7.5 Initiator Screen.

- Open the task from Inbox.

> All the sign of user shown in green sheet.

Office Note / Green Sheet

Submitted for approval under BDP clause D5 for INR 9000

Forwarded & Electronically Signed By :

Test User2 (100002)-Senior Finance & Accounts Officer

On : 24.11.2021 03:13:59 PM

cndjsnfhefuihweiufhewiufheiuw

Reviewed / Recommended & Electronically Signed By :

Test User1 (100001)-Senior Geophysicist (Surface)

On : 24.11.2021 03:17:17 PM

dsvdsvdsvsd

Agreed / Concurred & Electronically Signed By :

Test User3 (100003)-General Manager (Production)

On : 24.11.2021 03:19:40 PM

dsvsdvdsvdsv

Approved & Electronically Signed By :

Test User4 (100004)-Deputy General Manager (HR)

On : 24.11.2021 03:21:59 PM

> Click on History Button.

File Action

Save & Close   History

Send To Cabinet

Click on History button

➢ All the File movement is shown in Movement History Box.

Movement History

File No :
DLH/LAC/PFIN/20601/00006

Subject :
Manual-generic

Per page: 10

Date	Stage	From	To
24.11.2021 03:13:59 PM	Generic File Initiator	Test User2 (100002)-Senior Finance & Accounts Officer	Test User1 (100001)-Senior Geophysicist (Surface)
24.11.2021 03:17:16 PM	Review / Recommend	Test User1 (100001)-Senior Geophysicist (Surface)	Test User3 (100003)-General Manager (Production)
24.11.2021 03:19:39 PM	Agree / Concur	Test User3 (100003)-General Manager (Production)	Test User4 (100004)-Deputy General Manager (HR)
24.11.2021 03:21:58 PM	Approve	Test User4 (100004)-Deputy General Manager (HR)	Test User2 (100002)-Senior Finance & Accounts Officer

Showing 1 to 4 of 4 entries

Previous **1** Next

Close

➢ Now Click on Send to Cabinet button.

File Action

Save & Close   History

Send To Cabinet

Click on Send to Cabinet button

- Confirmation Dialog box open.
- Click on Yes button.
- Task goes to the Cabinet.
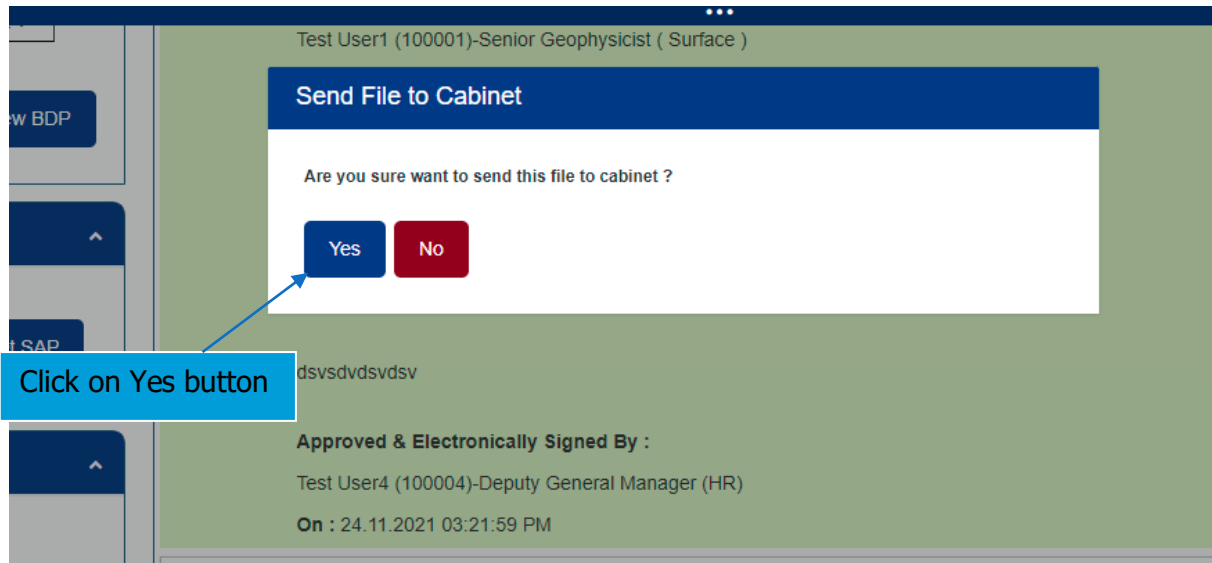
7.6   Cabinet Screen

- File shown in table.
- Choose your File.
- Click on Open button.

➤ File opens from cabinet.

➤ Click on Move to Inbox button.

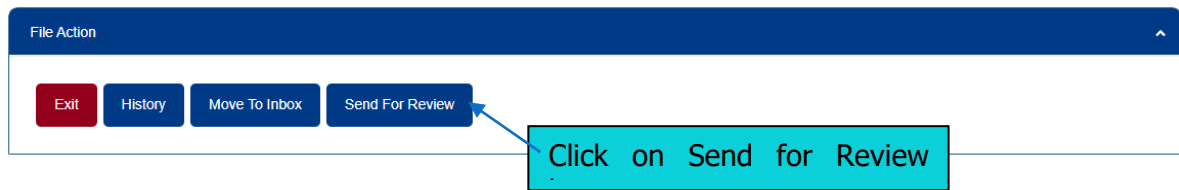Click on Move to Inbox button

➤ Click on Yes button.
➤ Task goes to the Inbox.
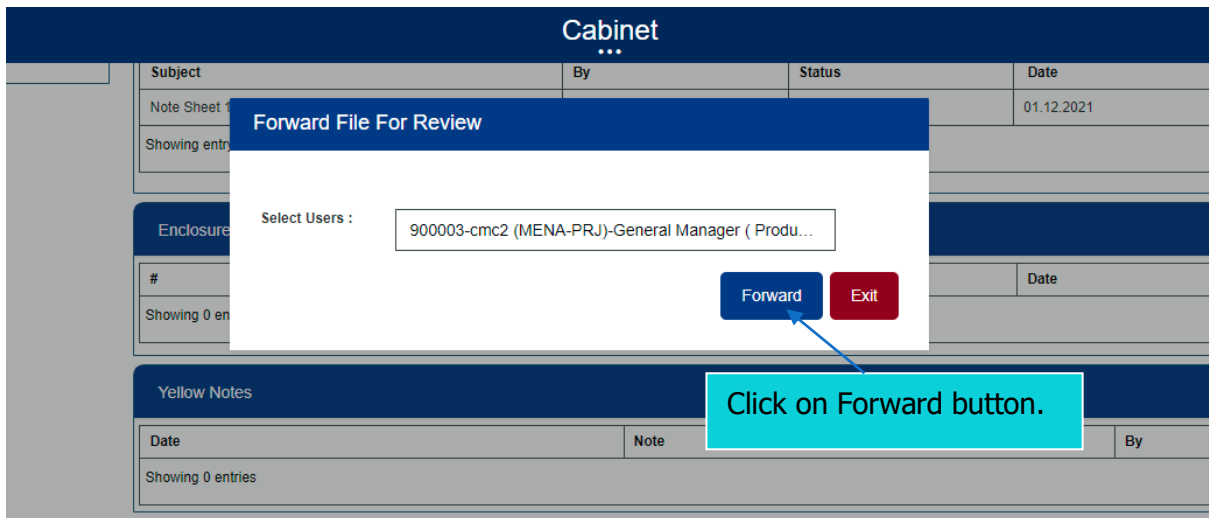➤ Now you can open the Task from Inbox and take further action.

Click on Yes button

- ➢ If you want to send for Review from Cabinet.**(Optional)**
- ➢ Then Click on Send for Review button.

Click on Send for Review

- ➢ Enter user in Select Users field.
- ➢ Click on Forward button.

Click on Forward button.

- ➢ Details of user shown in table.
- ➢ Click on Yes button.

Click on yes button.
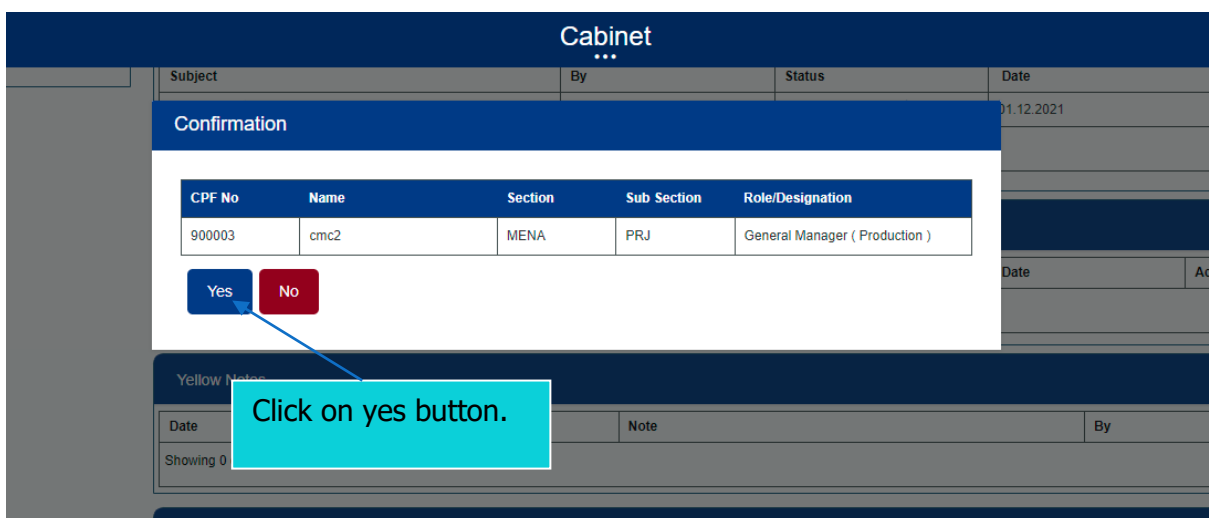
- ➢ Task goes to the Inbox of selected users.
- ➢ Login to the selected user.

7.7   File for Review Screen (Optional).

- ➢ Open the task from Inbox.

➢ All the sign of users shown in office note.

➢ Click on Return Button.

➢ Confirmation Dialog box open.
➢ Click on Yes button.

- ➢ Task goes to the Initiator.
- ➢ Login to the Initiator user.

7.8 File Reviewed Screen.

- ➢ Open the task from Inbox.

➢ All the sign of users shown in office note.

➢ Click on Send to Cabinet button.

Click on Send to Cabinet button.

➢ Confirmation Dialog box open.
➢ Click on Yes button.
➢ Task goes to the Cabinet of Initiator.
➢ Now user can open the task from cabinet and see the details of history.

Click on Yes button

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