



ONGC Videsh Ltd.



2021

Paperless Office- Legal Generic 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.

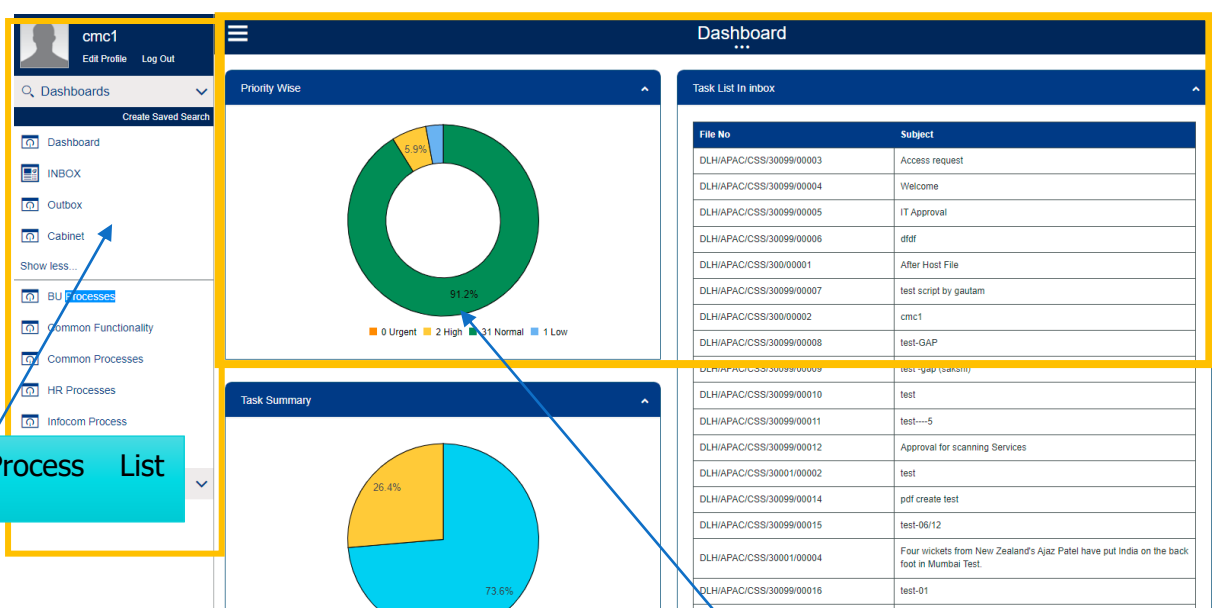
2 Login in the Paperless office:

- 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

View Process List

Inbox – View task assign to you

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...

4 How to run the LegalProcesses

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

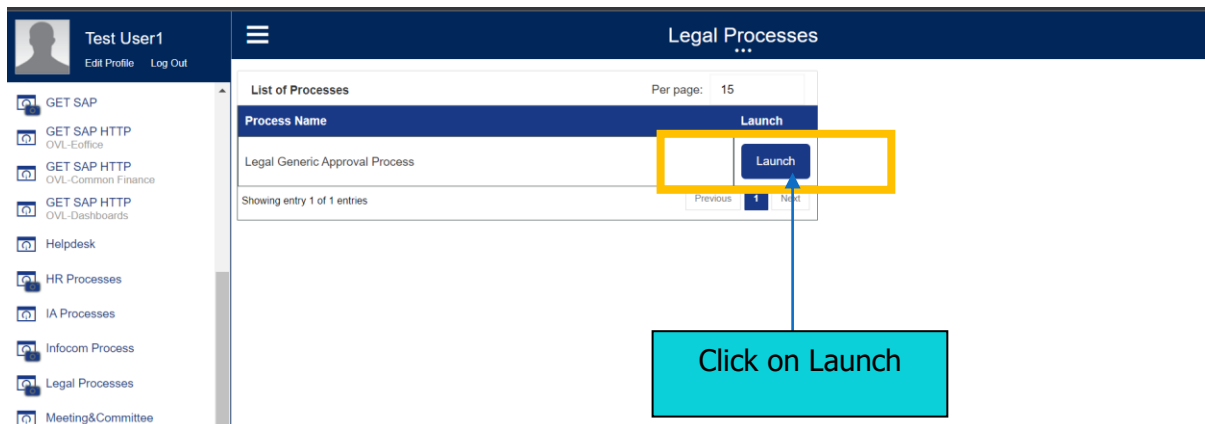
Legal Processes

Click on Legal Processes button on the Process list

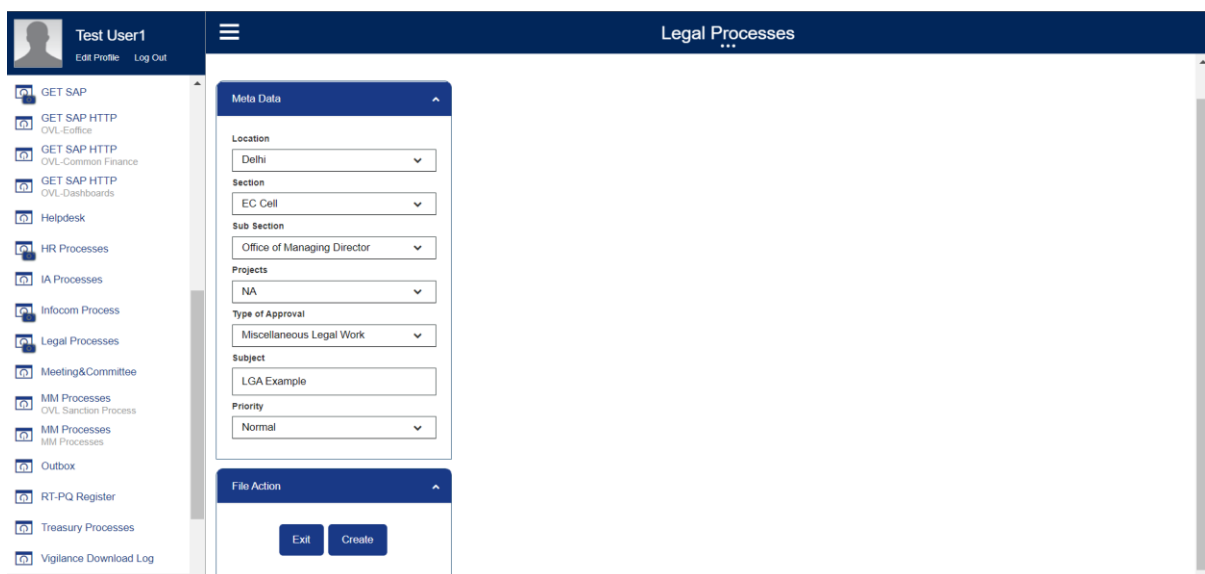
Process Name	Launch
Legal Generic Approval Process	Launch

5 Legal Generic 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

Miscellaneous Legal Work

Subject

LGA 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.

Yes

No

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/10099/00013

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:

- Save & close – File is saved in Inbox.
- E-Sign –User can sign and forward the file.
- 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.

BDP Clause

Amount

50,000.00

Currency

INR ▼

BDP

D1

View BDP

6.3 SAP T- Code

- Select SAP T-Code from dropdown.

SAP T-Code

ML81N ▼

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(Scrnshrt).docx

Add **Exit**

Add Description, Page NO. Upload Document.

Click on Add button

Yellow Notes

Date	Note	By
Showing 0 entries		

6.6 Add Yellow Note

Yellow Notes

Date By

Showing 0 entries

Add Yellow Note

Click on Add Yellow Note button

Previous Next

- 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**

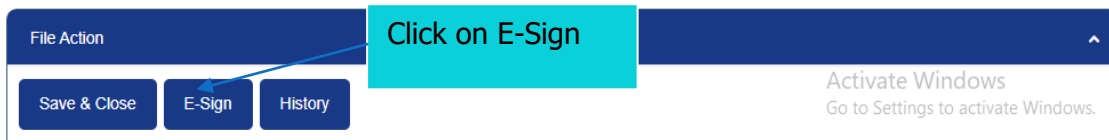
Type Yellow Note and click on Add button

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/RecommendedBy(Optional), Agree/Concurred By(Optional) and Approved field(Mandatory)
- Click on Add Button.

Generic Legal File Initiator

Select Users

Select Favourite

Reviewed/Recommended By : 100002-Test User2 (BD-BD)-Senior Finance & Accounts Officer Add

Agreed/Concurred By : 100002-Test User2 (APAC-CFIN)-Director (Finance) Add

Approved By : 100003-Test User3 (PFIN-PFIN)-General Manager (Production) Add

Click on Add button

Selected Users Per page: 10

User Type	CPF No	Name	Section	Sub Section	Role/Designation
Showing 0 entries					

Previous 1 Next

Forward Exit

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

Generic Legal File Initiator

Select Users

☐ Urgent

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	100002	Test User2	APAC	CFIN	Director (Finance)	✕
Approved By	100003	Test User3	PFIN	PFIN	General Manager (Production)	✕

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.

The screenshot shows the 'INBOX' screen for 'Test User2'. A table lists tasks with columns: File Name, File Subject, Stage, Task Name, Task From, Priority, and Task received. The first task is highlighted with a yellow box. A blue arrow points from a text box to this task.

File Name	File Subject	Stage	Task Name	Task From	Priority	Task received
DLH/ECC/OMD/10...	LGA Example	Generic Legal File ...	Generic Legal File ...	Test User1 (10000...		Dec 22, 2021, 1...
DLH/ECC/OMD/10...	test0----	Re-Appropriation o...	Re-Appropriation o...	Test User1 (10000...		Dec 22, 2021, 1...
AMS/PFIN/PFIN/5...	dd	Payment towards ...	Payment towards ...	Test User3 (10000...		Dec 22, 2021, 1...
AMS/PFIN/PFIN/5...	esf	Change in Assign...	Change in Assign...	Test User3 (10000...		Dec 21, 2021, 6...
DLH/BD/BD/10599...	test	Gene				Dec 21, 2021, 6...
DLH/BD/BD/105/0...	dgr	Chan				Dec 21, 2021, 5...
DLH/BD/BD/10524...	Test	Gove			0000...	Dec 21, 2021, 5...
DLH/ECC/OMD/10...	ICPay203	Impre			0000...	Dec 21, 2021, 5...

Task is visible in Inbox

- Write Comments in Office note/Green Sheet .

The screenshot shows the 'सार्थक पत्र / Working Paper' screen. It contains a paragraph about paragraphs. A blue arrow points from a text box to the screen.

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.

The screenshot shows the 'Generic Legal File Reviewer / Recommender' screen. It displays a list of tasks and a detailed view of a task.

File No	Creation Date	Priority	Age Of File (in Days)	Year
DLH/ECC/OMD/10099/00013	22-12-2021	Normal	0	2021-22

Subject: LGA Example Location: Delhi

Meta Data

Location: Delhi
Section: EC Cell
Sub Section: Office of Managing Director
Project: NA
Type of Approval: Miscellaneous Legal Work
Subject: LGA Example
Priority: Normal

BDP Clause

Amount: 50,000 INR
BDP: D1 View BDP

Office Note / Green Sheet

सार्थक पत्र / Working Paper

Submitted for approval under BDP clause D1 for INR 50,000.00

Forwarded & Electronically Signed By :
Test User1 (100001)-Director (Finance)
On: 22.12.2021 11:03:46 AM

- 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/ConcurrenUser.



7.3 Agree/Concurrer Screen

- Open the task from Inbox.

The screenshot shows the 'INBOX' interface for 'Test User2'. A table lists tasks with columns: File Name, File Subject, Stage, Task Name, Task From, Priority, and Task received. 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 received
DLH/ECC/OMD/10...	LGA Example	Generic Legal File ...	Generic Legal File ...	Test User2 (10000...		Dec 22, 2021, 1...
DLH/ECC/OMD/10...	testU----	Re-Appropriation o...	Re-Appropriation o...	Test User1 (10000...		Dec 22, 2021, 1...
AMS/PFIN/PFIN/5...	dd	Payment towards ...	Payment towards ...	Test User3 (10000...		Dec 22, 2021, 1...
AMS/PFIN/PFIN/5...	esf	Change in Assign...	Change in Assign...	Test User3 (10000...		Dec 21, 2021, 6...
DLH/BD/BD/10599...	test	Generic File Initiator	Generic File Initiator			Dec 21, 2021, 6...
DLH/BD/BD/10524...	dgr	Change in Bank Si...	Change in Bank Si...			Dec 21, 2021, 5...
DLH/BD/BD/10524...	Test			ser1 (10000...		Dec 21, 2021, 5...
DLH/ECC/OMD/10...	ICPay203			ser1 (10000...		Dec 21, 2021, 5...
DLH/ECC/OMD/10...	Committee Approv...			ser2 (10000...		Dec 21, 2021, 5...

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

The screenshot shows the 'Generic Legal File Agree / Concurrer' screen. On the left, there's a 'Meta Data' section with fields like Location, Section, Sub Section, Project, Type of Approval, Subject, and Priority. On the right, the 'Office Note / Green Sheet' section has a green background with text and signatures.

Meta Data:

- Location: Delhi
- Section: EC Cell
- Sub Section: Office of Managing Director
- Project: NA
- Type of Approval: Miscellaneous Legal Work
- Subject: LGA Example
- Priority: Normal

Office Note / Green Sheet:

Submitted for approval under BDP clause D1 for INR 50,000.00

Forwarded & Electronically Signed By :

Test User1 (100001)-Director (Finance)

On : 22.12.2021 11:03:46 AM

Review ok

Forwarded & Electronically Signed By :

Test User2 (100002)-Senior Finance & Accounts Officer

On : 22.12.2021 11:07:49 AM

- 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 from a text box 'Click on E-sign Button' to the 'E-Sign' button.

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

Action With eSign

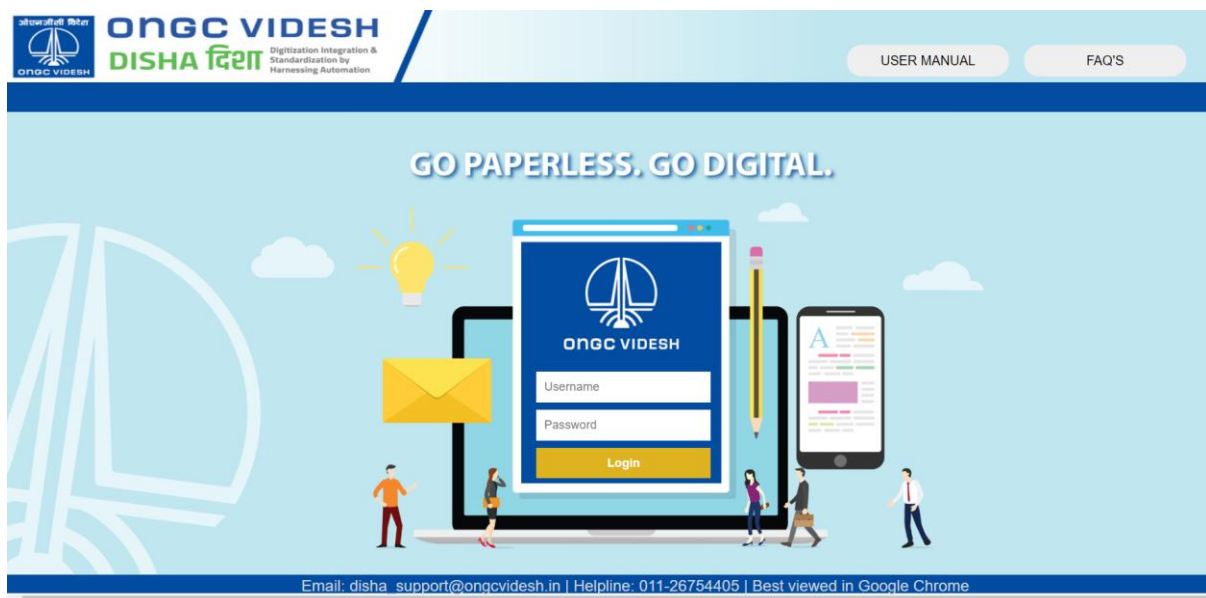
Select Action

☒ 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 User3
Edit Profile Log Out

INBOX

Enter search text...

File Name	File Subject	Stage	Task Name	Task From	Priority	Task
DLH/ECC/OMD/1...	LGA Example	Generic Legal Fil...	Generic Legal Fil...	Test User2 (1000...		Dec
DLH/ECC/OMD/1...	Committee list te...	Generic File Appr...	Generic File Appr...	Test User1 (1000...		Dec
DLH/ECC/OMD/1...	test-22-12	Cash and Bank R...	Cash and Bank R...	Test User1 (1000...		Dec
DLH/BD/BD/105/...	aa	Cash and Bank R...	Cash and Bank R...	Test User2 (1000...		Dec
DLH/BD/BD/105/...	fehrhore	Cash and Bank R...	Cash and Bank R...	Test User2 (1000...		Dec

Task is visible in Inbox

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

Generic Legal File Approver

File No: DLH/ECC/OMD/10099/00013 Creation Date: 22-12-2021 Priority: Normal Age Of File (in Days): 0 Year: 2021-22

Subject: LGA Example Location: Delhi

Meta Data

Location: Delhi

Section: EC Cell

Sub Section: Office of Managing Director

Project: NA

Type of Approval: Miscellaneous Legal Work

Subject: LGA Example

Priority: Normal

BDP Clause

Amount: 50,000 INR

BDP: D1 View BDP

Office Note / Green Sheet

Submitted for approval under BDP clause D1 for INR 50,000.00

Forwarded & Electronically Signed By:

Test User1 (100001)-Director (Finance)

On: 22-12-2021 11:03:46 AM

Review ok

Forwarded & Electronically Signed By:

Test User2 (100002)-Senior Finance & Accounts Officer

On: 22-12-2021 11:07:49 AM

Agree ok

Concurred & Electronically Signed By:

Test User2 (100002)-Director (Finance)

On: 22-12-2021 11:15:06 AM

- Click on E-sign button.

File Action

Save & Close E-Sign History

Click on E-sign button

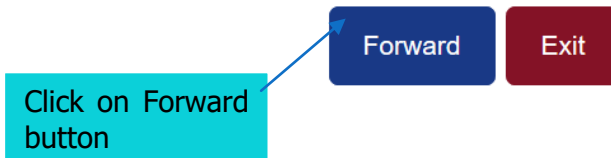
- Select Approve on Select Action.

Action With eSign

☐ Urgent

Select Action

☐ Approve ☐ Return to Initiator ☐ Forward For Review



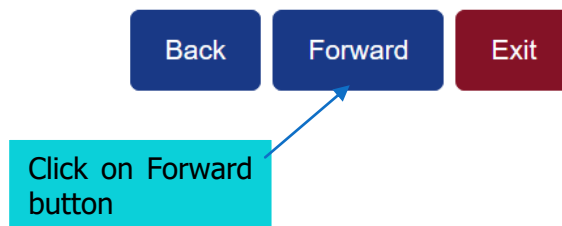
- Now select Approve & Send to Initiator.
- Click on Forward button.

Action With eSign

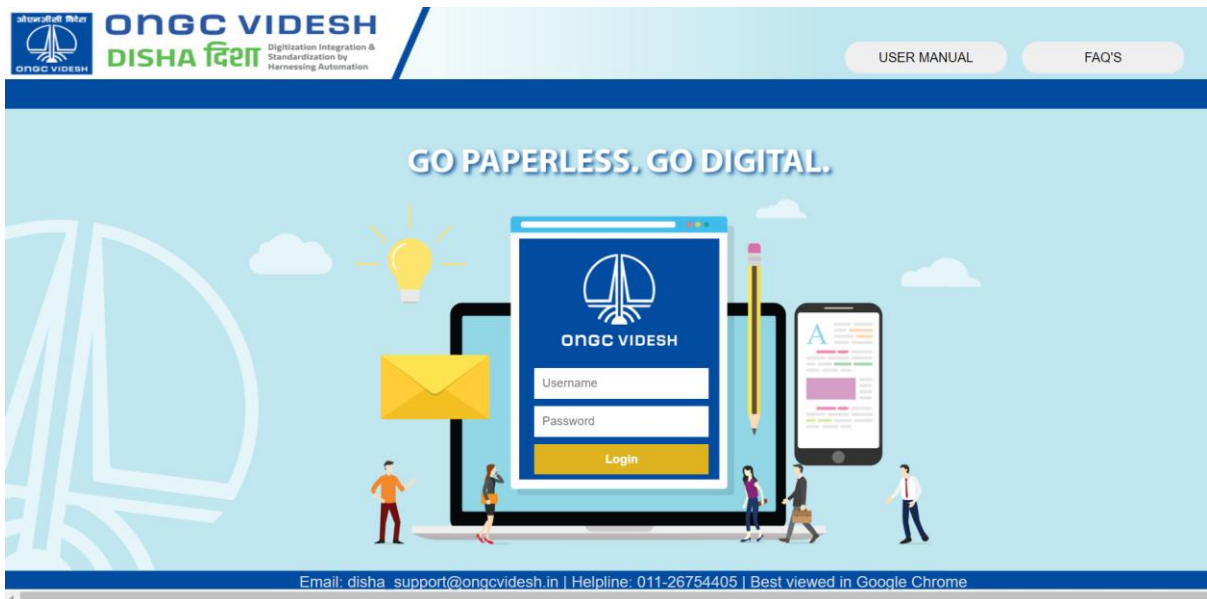
☐ Urgent

Select Action

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



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



7.5 Initiator Screen.

- Open the Task from Inbox.

File Name	File Subject	Stage	Task Name	Task From	Priority	Task received ...
DLH/ECC/OMD/10...	LGA Example	Generic Legal File ...	Generic Legal File ...	Test User3 (10000...		Dec 22, 2021, 1...
DLH/ECC/OMD/10...	Test	Investment Approv...	Investment Approv...	Test User2 (10000...		Dec 22, 2021, 1...
DLH/BD/BD/10516...	test-----0	Cash Call Reviewe...	Cash Call Reviewe...	Test User2 (10000...		Dec 21, 2021, 1...
DLH/ECC/OMD/10...	Test	Partner Audit Proc...	Partner Audit Proc...			Dec 21, 2021, 7...
DLH/ECC/OMD/10...	ABC					Dec 21, 2021, 6...
DLH/ECC/OMD/10...	test for copy			0000...		Dec 21, 2021, 6...
DLH/ECC/OMD/10...	Test					Dec 21, 2021, 6...
DLH/ECC/OMD/10...	ICAAPay2101	impress-Comingent...	impress-Comingent...			Dec 21, 2021, 6...

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

Office Note / Green Sheet

Forwarded & Electronically Signed By :
 Test User1 (100001)-Director (Finance)
 On : 22.12.2021 11:03:46 AM

Review ok

Forwarded & Electronically Signed By :
 Test User2 (100002)-Senior Finance & Accounts Officer
 On : 22.12.2021 11:07:49 AM

Agree ok

Concurred & Electronically Signed By :
 Test User2 (100002)-Director (Finance)
 On : 22.12.2021 11:15:06 AM

Approve ok

Approved & Electronically Signed By :
 Test User3 (100003)-General Manager (Production)
 On : 22.12.2021 11:20:52 AM

- Click on Send to Cabinet Button.

File Action

Save & Close

History

Send To Cabinet

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 ?

Yes

No

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.

Test User1

Edit Profile Log Out

Dashboard

Cabinet

INBOX

Show more... (25)

Cabinet

Select Type : Closed

Search File : Search by selected type.

File No

File No	Subject	File Type	Year	Created By	Created On	Updated On
<input checked="" type="radio"/> DLH/ECC/OMD/10099/00013	LGA Example	GenericLegal	2021-22	Test User1 (100001)	22.12.2021	22.12.2021
<input type="radio"/> DLH/ECC/OMD/10099/00012	LGP	GenericLegal	2021-22	Test User1 (100001)	21.12.2021	21.12.2021
<input type="radio"/> DLH/ECC/OMD/10024/00025	Test	CAG Audit	2021-22	Test User1 (100001)	21.12.2021	21.12.2021
<input type="radio"/> DLH/ECC/OMD/10002/00013	ICAPay203	Imprest Advance	2021-22	Test User1 (100001)	21.12.2021	21.12.2021
<input type="radio"/> DLH/ECC/OMD/10002/00011	ICAPay202	Imprest Advance	2021-22	Test User1 (100001)	21.12.2021	21.12.2021
<input type="radio"/> DLH/ECC/OMD/10002/00010	ICAPay211	Imprest Advance	2021-22	Test User1 (100001)	21.12.2021	21.12.2021
<input type="radio"/> DLH/ECC/OMD/10007/00007	test-manual2	ChangeInAssignm ent	2021-22	Test User1 (100001)	21.12.2021	21.12.2021
<input type="radio"/> DLH/ECC/OMD/10007/00006	test-manual	ChangeInAssignm ent	2021-22	Test User1 (100001)	21.12.2021	21.12.2021
<input type="radio"/> DLH/ECC/OMD/10017/00002	LGA211	GenericLegal	2021-22	Test User1 (100001)	21.12.2021	21.12.2021
<input type="radio"/> DLH/ECC/OMD/10026/00009	Copy test suresh 01	Generic Committee	2021-22	Test User1 (100001)	21.12.2021	21.12.2021

Showing 1 to 10 of 34 entries

Previous 1 2 3 4 Next

Open

Click on Cabinet button on the process list panel

Click on Open button.

Test User1 | **Cabinet**

File No: DLHECCOMD10099/00013 | Creation Date: 22-12-2021 | Priority: Normal | Age Of File (in Days): 0 | Year: 2021-22

Subject: LGA Example | Location: Delhi

Meta Data

- Location: Delhi
- Section: EC Cell
- Sub Section: Office of Managing Director
- Project: N/A
- Subject: LGA Example
- Priority: Normal

BDP Clause

Amount: 50,000 INR | BDP: D1 | [View BDP](#)

SAPT Code

Select S-Code | [Get SAP](#)

Office Note / Genn Sheet

Submitted for approval under BDP clause D1 for INR 50,000.00

Forwarded & Electronically Signed By :
Test User1 (100001)-Director (Finance)
On: 22-12-2021 11:03:46 AM

Review ok

Forwarded & Electronically Signed By :
Test User2 (100002)-Senior Finance & Accounts Officer
On: 22-12-2021 11:07:49 AM

Agree ok

Concerned & Electronically Signed By :
Test User2 (100002)-Director (Finance)
On: 22-12-2021 11:15:06 AM

Approve ok

Approved & Electronically Signed By :
Test User3 (100003)-General Manager (Production)

- Now you can see all the data of user.

7.6.1 Notes Sheet(s)

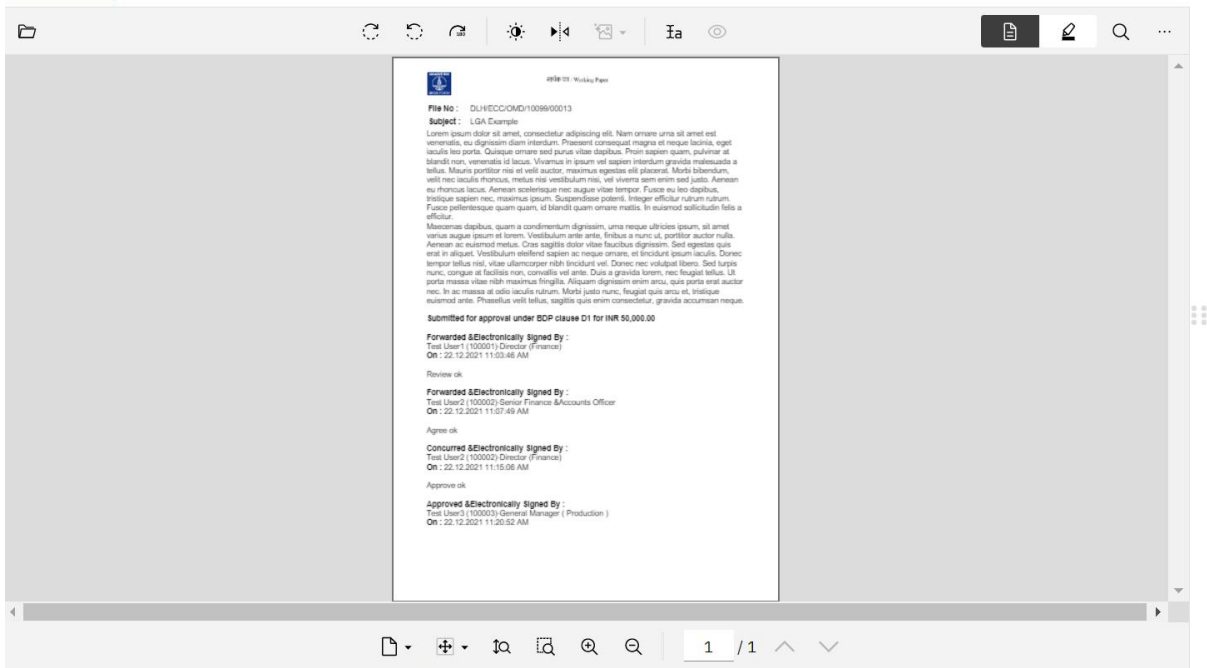
- In this section click on actions icon to open Notes sheet(s).

Note Sheet(s)				
Subject	By	Status	Date	Actions
Note Sheet 1	Test User1	Signed	22.12.2021	
Showing entry 1 of 1 entries				Previous 1 Next

- Notes Sheet(s) will open.

View Notes Sheet(s)

Note Sheet 1



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)-Director (Finance)	22.12.2021	22.12.2021
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 User2 (100002)-Director (Finance)
Approver	Test User3 (100003)-General Manager (Production)

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/10099/00013

Subject :

LGA Example

			Per page:	10
Date	Stage	From	To	
22.12.2021 11:09:41 AM	Generic File Initiator	Test User1 (100001)-Director (Finance)	Test User2 (100002)-Senior Finance & Accounts Officer	
22.12.2021 11:13:43 AM	Review / Recommended	Test User2 (100002)-Senior Finance & Accounts Officer	Test User2 (100002)-Director (Finance)	
22.12.2021 11:21:01 AM	Agree / Concur	Test User2 (100002)-Director (Finance)	Test User3 (100003)-General Manager (Production)	
22.12.2021 11:26:46 AM	Approve	Test User3 (100003)-General Manager (Production)	Test User1 (100001)-Director (Finance)	
22.12.2021 11:38:24 AM	Generic 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.

The screenshot shows the 'Outbox' screen for 'Test User1'. On the left is a sidebar with various process categories. The main area displays a table of files with columns: File No, Subject, File Type, Priority, Stage, Action, and Date. The first file is selected. Below the table, there is a pagination bar showing 'Showing 1 to 10 of 125 entries'. At the bottom left of the table area, there is an 'Open' button, which is highlighted by a red arrow and the text 'Click on Open button'.

- This is user Outbox screen.

The screenshot shows the 'Outbox' screen for 'Test User1' with the details of a selected file. The file number is DLHECC/OMD/10099/00013, created on 22-12-2021, with a priority of Normal and a location of Delhi. The subject is LGA Example. The 'Meta Data' section shows the location as Delhi, section as EC Cell, sub-section as Office of Managing Director, project as NA, and subject as LGA Example. The 'BDP Clause' section shows an amount of 50,000 INR and a BDP of D1. The 'Office Note / Green Sheet' section contains a detailed note about the submission for approval under BDP clause D1 for INR 50,000.00, including forwarding and electronic signing by Test User1 and Test User2.

- 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/10099/00013

Subject :
LGA Example

			Per page:	10
Date	Stage	From	To	
22.12.2021 11:09:41 AM	Generic File Initiator	Test User1 (100001)-Director (Finance)	Test User2 (100002)-Senior Finance & Accounts Officer	
22.12.2021 11:13:43 AM	Review / Recommend	Test User2 (100002)-Senior Finance & Accounts Officer	Test User2 (100002)-Director (Finance)	
22.12.2021 11:21:01 AM	Agree / Concur	Test User2 (100002)-Director (Finance)	Test User3 (100003)-General Manager (Production)	
22.12.2021 11:26:46 AM	Approve	Test User3 (100003)-General Manager (Production)	Test User1 (100001)-Director (Finance)	
22.12.2021 11:38:24 AM	Generic File Initiator	Test User1 (100001)-Director (Finance)	To Cabinet	
Showing 1 to 5 of 5 entries			Previous	1 Next

Close

Click on Close button

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