2021

Paperless Office- Generic BD Approval Process – User Manual

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Document Control

Document Information

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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.

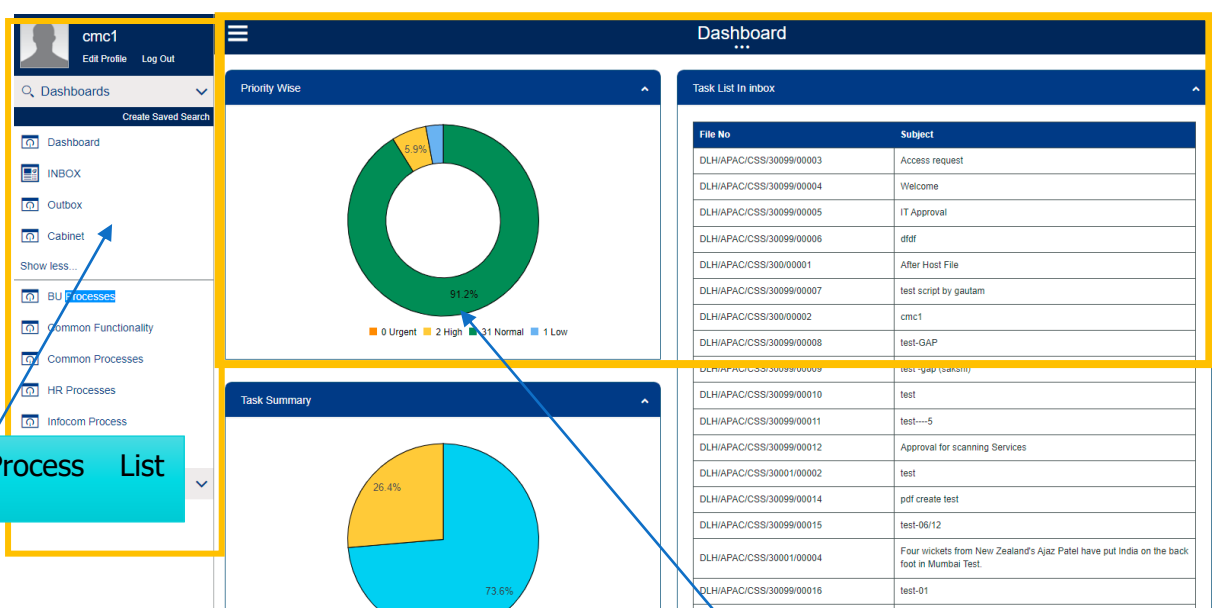# 2   Login in the Paperless office:

- 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 BDProcesses

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

5   Generic BD Approval Process Launch:

- ➢ Click on Launch button.

Click on 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.**
- 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.

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 Seriese.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.
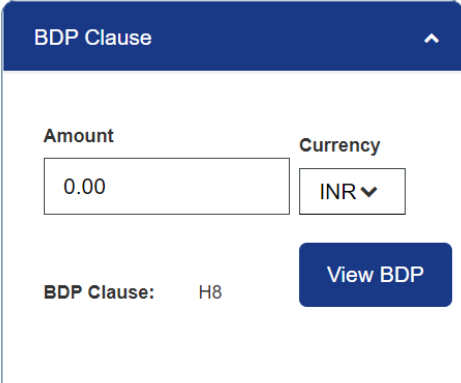
File Action – File Action section has three buttons:

     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.
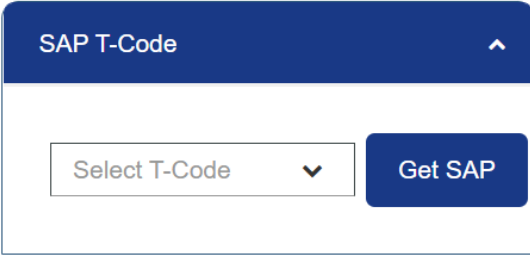
6.2   BDP Clause

➢ Enter Amount and Select currency as per BDP.

6.3   SAP T- CODE

➢ Select SAP T-Code from dropdown.

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.

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 Description, Page NO.
Upload Document.

Click on Add button

6.6 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.

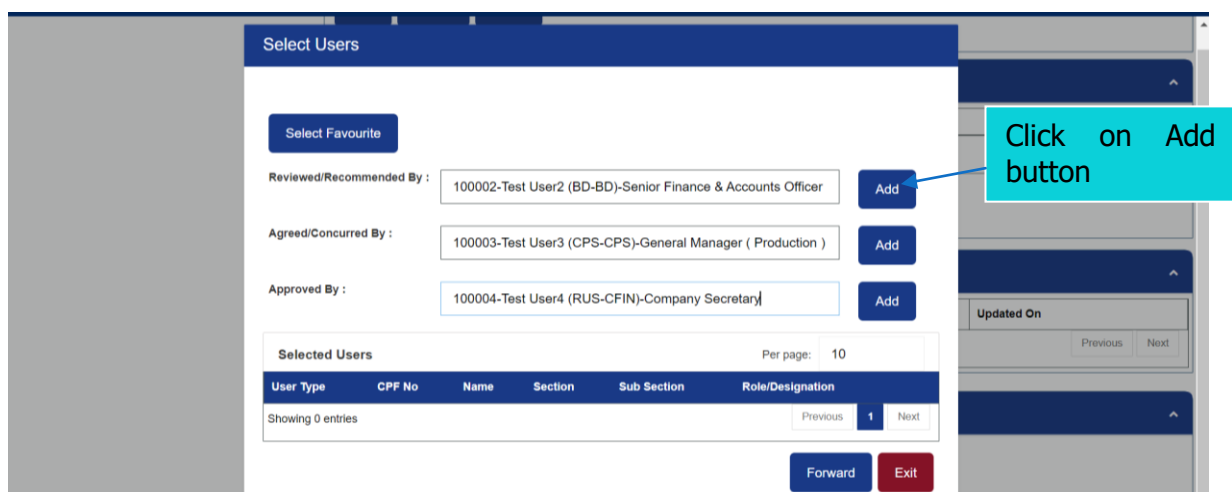Type Yellow Note and click on Add button

7   Sending a File

7.1   Initiator Screen

➢ Click on E-sign button.

Note: On click on save button. Noting will saved as Draft.
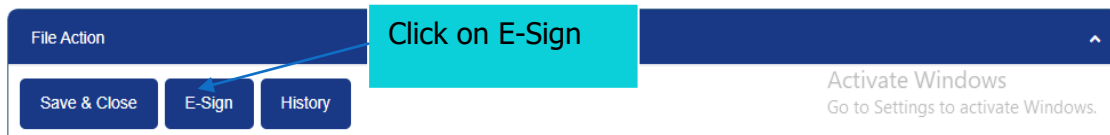
➢ Select the user of Reviewed/Recommended By(Optional), Agree/Concurred By(Optional) and Approved field(Mandatory)
➢ Click on Add Button.

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

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 .

Write Comments in Office Note/Green Sheet

> All the sign of users shown in Office Note.

> Click on E-sign button.

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.

Select Action and Click on Forward Button

- ➢ Task goes to the Agree/Concurrer.
- ➢ Login withAgree/Concurrer User.

7.3 Agree/Concurrer Screen

➢ Open the task from Inbox.

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

➢ 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

[Forward] [Exit]

Click on Forward button

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

GO PAPERLESS. GO DIGITAL.

ONGC VIDESH

Username

Password

Login

Email: disha_support@ongcvidesh.in | Helpline: 011-26754405 | Best viewed in Google Chrome
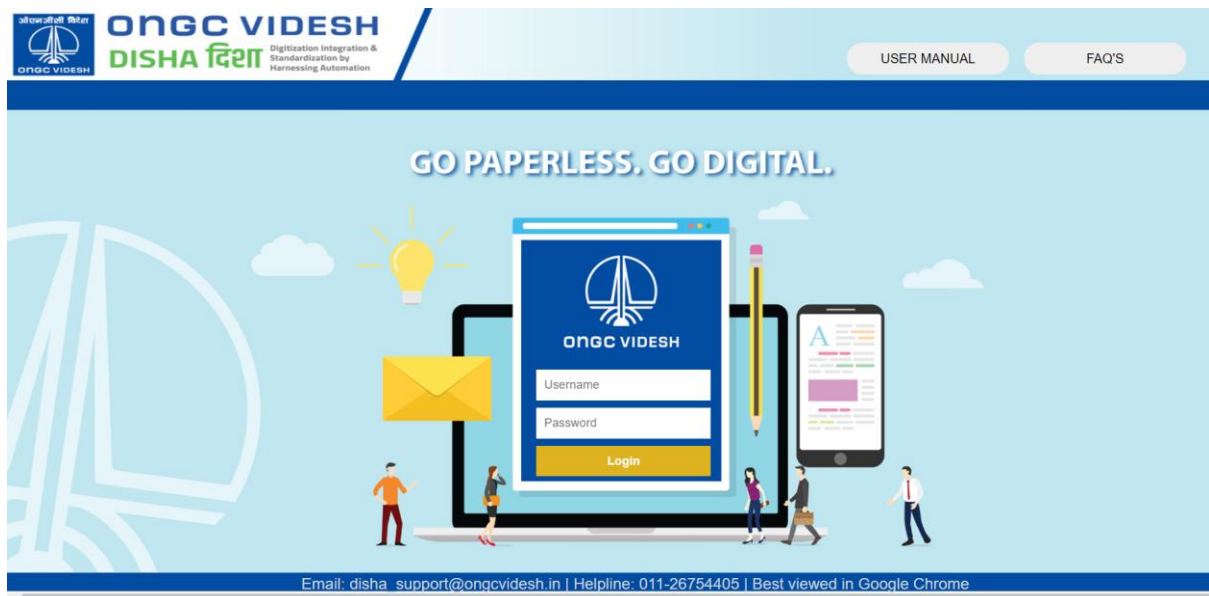
7.4   Approver Screen.

> ➢ Open the task from Inbox.

Task is visible in Inbox

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

➤ Click on E-sign button.

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.

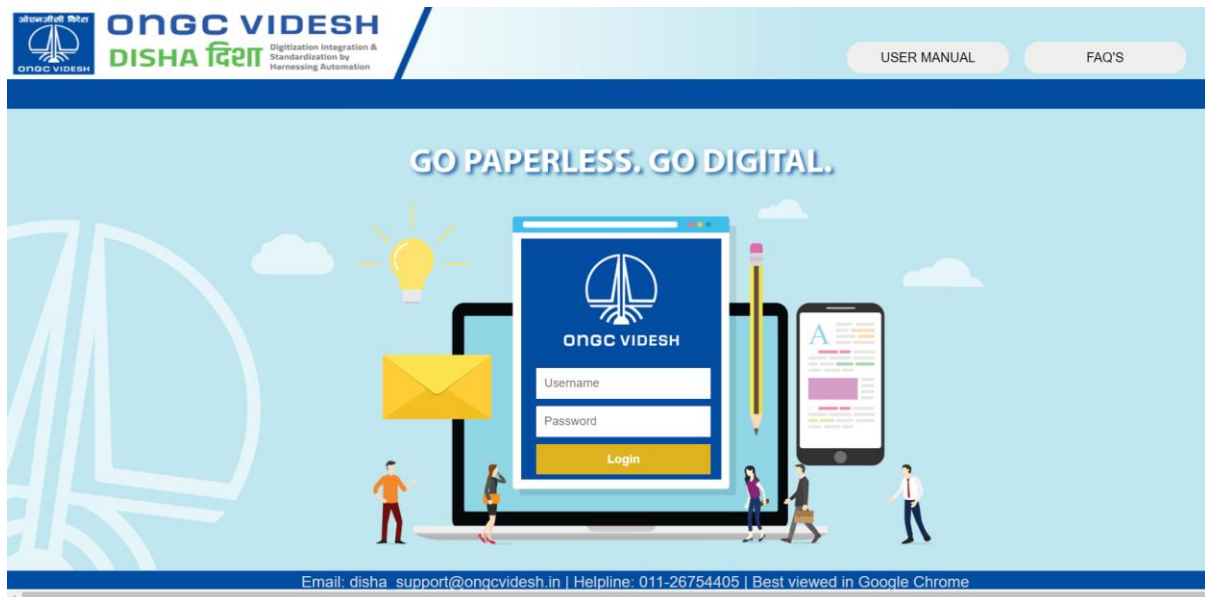## 7.5 Initiator Screen.

- ➢ Open the Task from Inbox.

Task is Visible in Inbox

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

➢ Click on Send to Cabinet Button.

File Action

Save & Close | Send To Cabinet | History

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.

	File No	Subject	File Type	Year	Created By	Created On	Updated On
⦿	DLH/ECC/OMD/10008/00003	Generic BD Example	GenericBDApproval	2021-22	Test User1 (100001)	20.12.2021	20.12.2021
○	DLH/ECC/OMD/10002/00006	ICapay201	Imprest Advance	2021-22	Test User1 (100001)	20.12.2021	20.12.2021
○	DLH/ECC/OMD/10002/00004	ICAPP202	Imprest Advance	2021-22	Test User1 (100001)	20.12.2021	20.12.2021
○	DLH/ECC/OMD/10006/00002	ICAAP203	Imprest Adjustment	2021-22	Test User1 (100001)	20.12.2021	20.12.2021
○	DLH/ECC/OMD/10002/00005	ICAPP203	Imprest Advance	2021-22	Test User1 (100001)	20.12.2021	20.12.2021
○	DLH/ECC/OMD/10099/00007	Test	Generic	2021-22	Test User1 (100001)	20.12.2021	20.12.2021
○	DLH/ECC/OMD/10021/00010	Rapp2	ReportApproval	2021-22	Test User1 (100001)	20.12.2021	20.12.2021
○	DLH/ECC/OMD/10003/00004	Inp203	InterestPenalty	2021-22	Test User1 (100001)	20.12.2021	20.12.2021
○	DLH/ECC/OMD/10003/00003	Inp202	InterestPenalty	2021-22	Test User1 (100001)	20.12.2021	20.12.2021
○	DLH/ECC/OMD/10003/00002	InP201	InterestPenalty	2021-22	Test User1 (100001)	20.12.2021	20.12.2021

Showing 1 to 10 of 16 entries   Previous 1 2 Next

Click on Cabinet button on the process list panel

Open

Click on Open button.

> ➢ 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).

> ➢ Notes Sheet(s) will open.

View Notes Sheet(s)
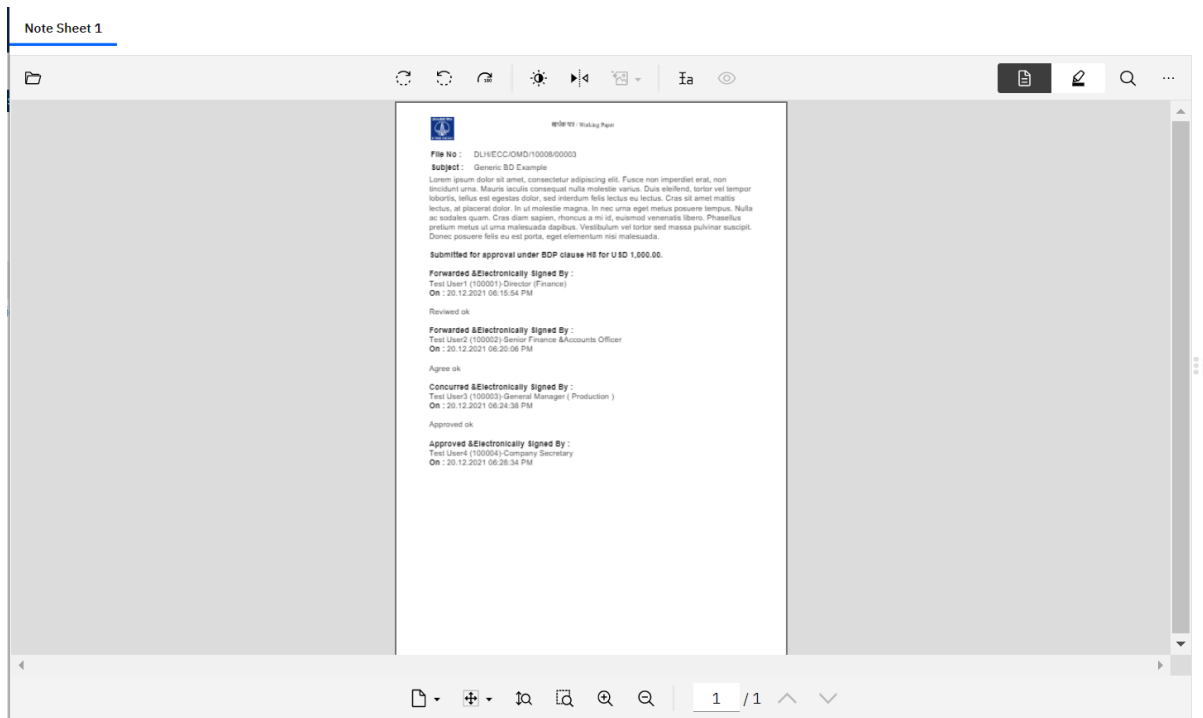
7.6.2 Enclosures

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

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

Enclosures

7.6.3 File Workflow

➢ Select File Workflow using radio selection button.

File Workflow

	Workflow	Created By	Created On	Updated On
◯	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.

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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 PM	Generic BD File Initiator	Test User1 (100001)-Director (Finance)	Test User2 (100002)-Senior Finance & Accounts Officer
20.12.2021 06:25:47 PM	Review / Recommend	Test User2 (100002)-Senior Finance & Accounts Officer	Test User3 (100003)-General Manager (Production)
20.12.2021 06:30:20 PM	Agree / Concur	Test User3 (100003)-General Manager (Production)	Test User4 (100004)-Company Secretary
20.12.2021 06:34:15 PM	Approve	Test User4 (100004)-Company Secretary	Test User1 (100001)-Director (Finance)
20.12.2021 06:39:06 PM	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.

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APPOLO COMPUTERS | costacloud

Click on Open button

➢ This is user Outbox screen.

➢ Click on History button.

- ➢ 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 PM	Generic BD File Initiator	Test User1 (100001)-Director (Finance)	Test User2 (100002)-Senior Finance & Accounts Officer
20.12.2021 06:25:47 PM	Review / Recommend	Test User2 (100002)-Senior Finance & Accounts Officer	Test User3 (100003)-General Manager (Production)
20.12.2021 06:30:20 PM	Agree / Concur	Test User3 (100003)-General Manager (Production)	Test User4 (100004)-Company Secretary
20.12.2021 06:34:15 PM	Approve	Test User4 (100004)-Company Secretary	Test User1 (100001)-Director (Finance)
20.12.2021 06:39:06 PM	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--