Paperless Office- Nomination of representative for Foreign Trip – User Manual

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Document Control

Document Information

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Document History

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[1.0]	30.12.2021	

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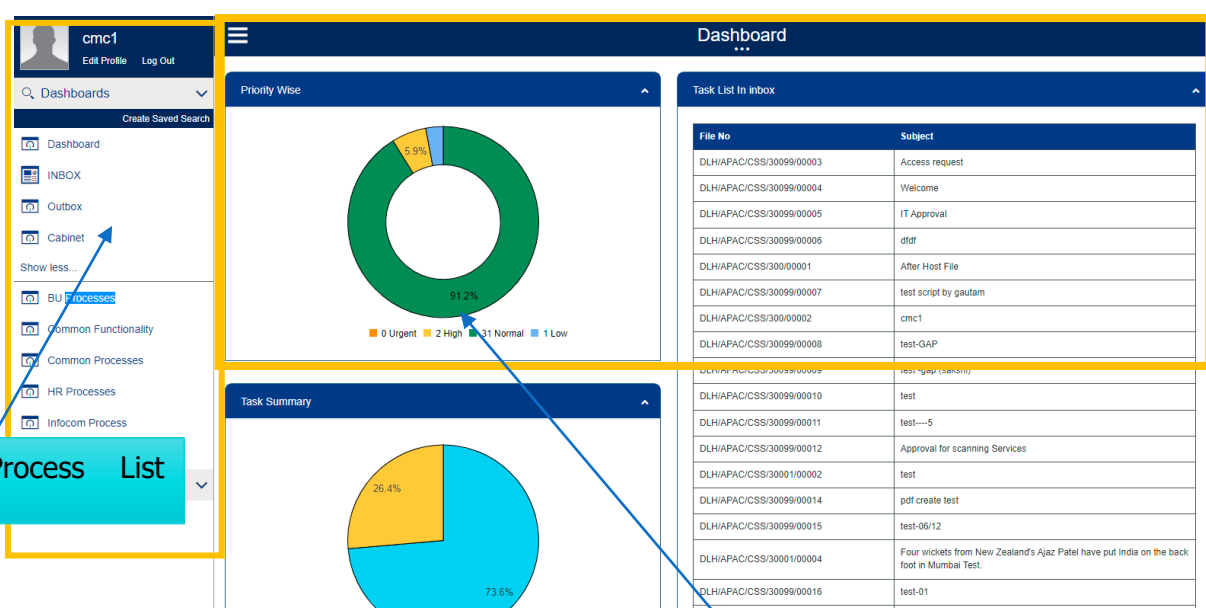
➢ Open the Process Portal URL: https://disha.ongcvidesh.in/ProcessPortal/login.jsp
➢ Enter Your Windows username/ Password.

3   Login Screen Overview:

• Dashboard screen

- Inbox Screen

4 How to run the BU Processes

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

5   Nomination of representative for Foreign Trip 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 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.
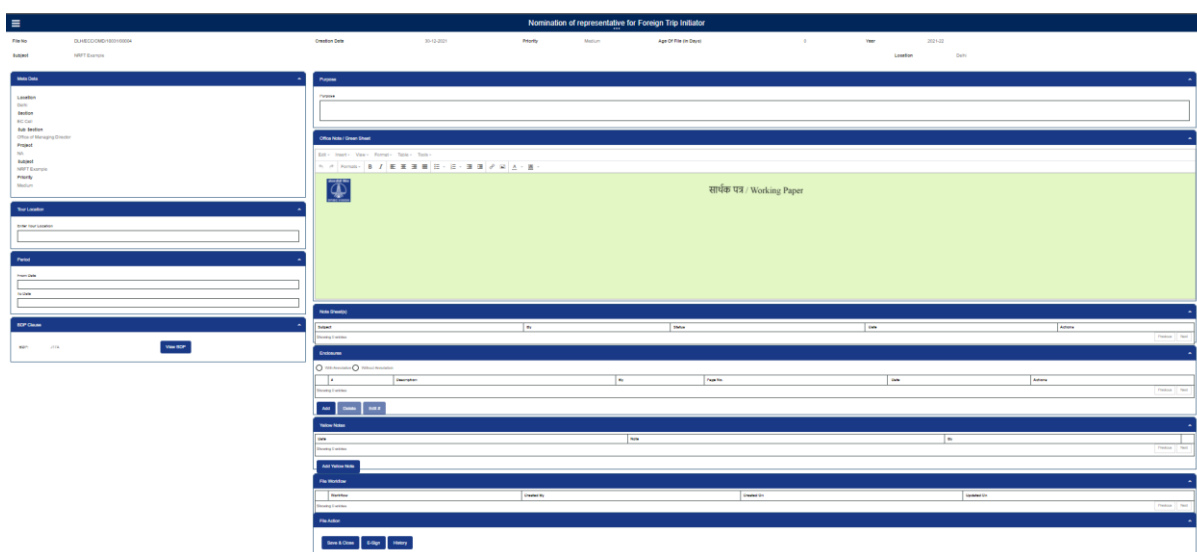
Click on Create button

➢ 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 e.g., DLH/ECC/OMD/10031/00004

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.

Tour Location – In this enter the Tour Location for foreign trip.

Period – In this enter the period of foreign trip, from start date to end date.

BDP Clause – In this BDP Clause J17A Applicable is fixed.

Purpose – Enter purpose for foreign trip.

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   Tour Location

➢ In this enter the Tour Location for foreign trip.

Tour Location	^
Enter Tour Location	
Russia	

6.3   Period

➢ In this enter the period of foreign trip, from start date to end date.

Period	^
From Date	
30.12.2021	
To Date	
31.12.2021	

6.4   BDP Clause

➢ In this BDP Clause J17A Applicable is fixed.

BDP Clause	^
BDP: J17A View BDP	

6.5 Purpose

➢ Enter purpose for foreign trip.

Purpose	^
Purpose	
Foreign trip for project document signing.	

6.6 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

6.7 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

6.8 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.

Add Yellow Note

Yellow Note:

> server. You can use Process Inspector to troubleshoot process instances that have problems.
> Procedure

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.

File Action

Save & Close   E-Sign   History

Click on E-Sign

Activate Windows
Go to Settings to activate Windows.

➢ Select the user of Nominator.
➢ Click on Add Button.

Nomination of representative for Foreign Trip Initiator

◯ With Annotation ◯ Without Annotation

Nomination

Click on Add button

Select Nominator :   100002-Test User2 (BD-BD)-Senior Finance & Accounts Officer   Add

Selected Users					Per page:	10
User Type	**CPF No**	**Name**	**Section**	**Sub Section**	**Role/Designation**	
Showing 0 entries					Previous	Next

Forward   Exit

➢ All users are showing in table of selected users.

➢ Click on Forward button.

Nomination of representative for Foreign Trip Initiator

○ With Annotation ○ Without Annotation

Nomination

Select Nominator : [Type user name,cpf no,designation..] [Add]

Selected Users					Per page:	10	
User Type	CPF No	Name	Section	Sub Section	Role/Designation		
Nominated By	100002	Test User2	BD	BD	Senior Finance & Accounts Officer	✖	
Showing entry 1 of 1 entries					Previous	1	Next

Click on Forward button. → [Forward] [Exit]
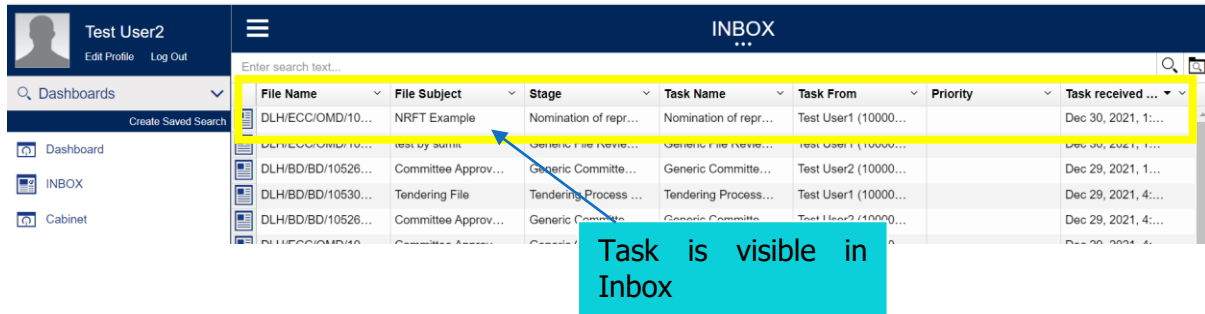
➢ Now task go to the Nominator.
➢ Login to Nominator user.
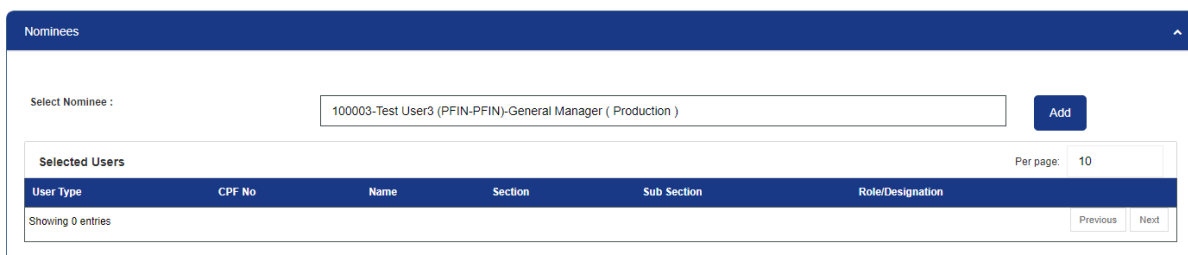
7.2   Nominator Screen

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

➢ Select Nominee(s).

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

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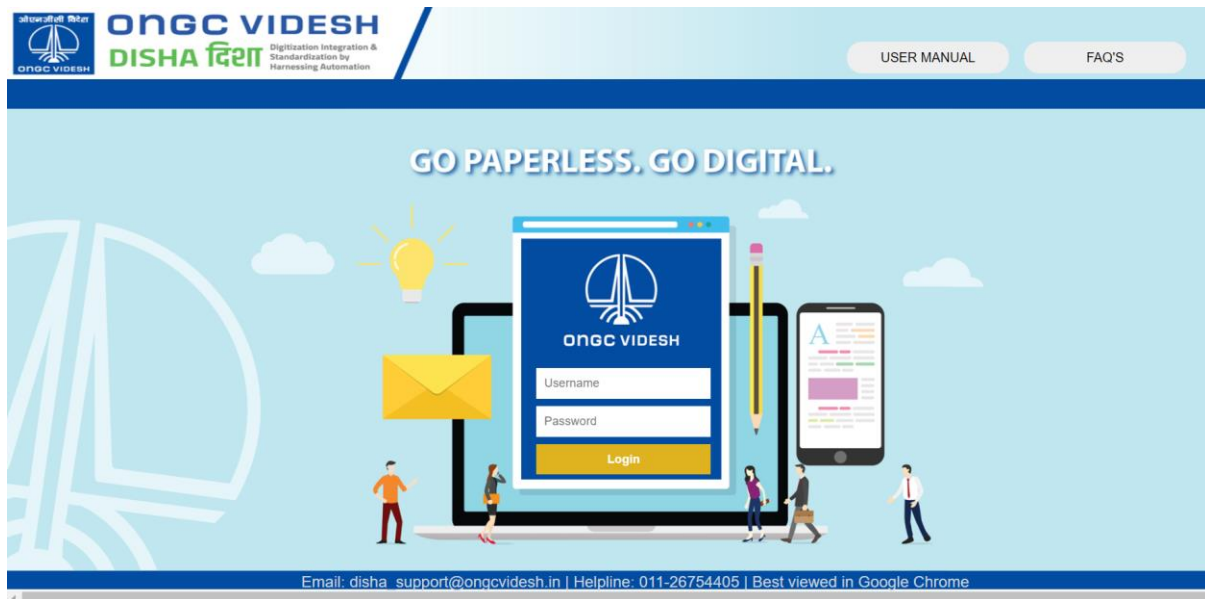
➢ All the sign of users shown in Office Note.

➢ Click on E-sign button.

Click on E-Sign

➢ Select Nominated on Select Action.
➢ Click on Forward button.

Select Action and Click on Forward Button

- ➢ Task goes to the Initiator.
- ➢ Login with Initiator User.

7.3 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 E-sign button.

File Action				^
Save & Close	E-Sign	Send To Cabinet	History	

Click on E-sign Button

➢ Select Forward for Approval.
➢ Click on Next button.

Nomination of representative for Foreign Trip Initiator
...

Select Option

○ Forward For Review   ⊙ Forward For Approval   ○ Forward to Nominator

Next   Exit

Click on Next button

➢ Select users of Reviewed/ Recommended by, Agreed/Concurred by, Approved by.
➢ Click on Add buttons.
➢ Click Forward button.

Nomination of representative for Foreign Trip Initiator
...

Select Users

☐ **Urgent**

Select Favourite

Reviewed/Recommended By :   100003-Test User3 (PFIN-PFIN)-General Manager (Production)   Add

Agreed/Concurred By :   100004-Test User4 (APAC-COFF)-Country Manager-Brazil   Add
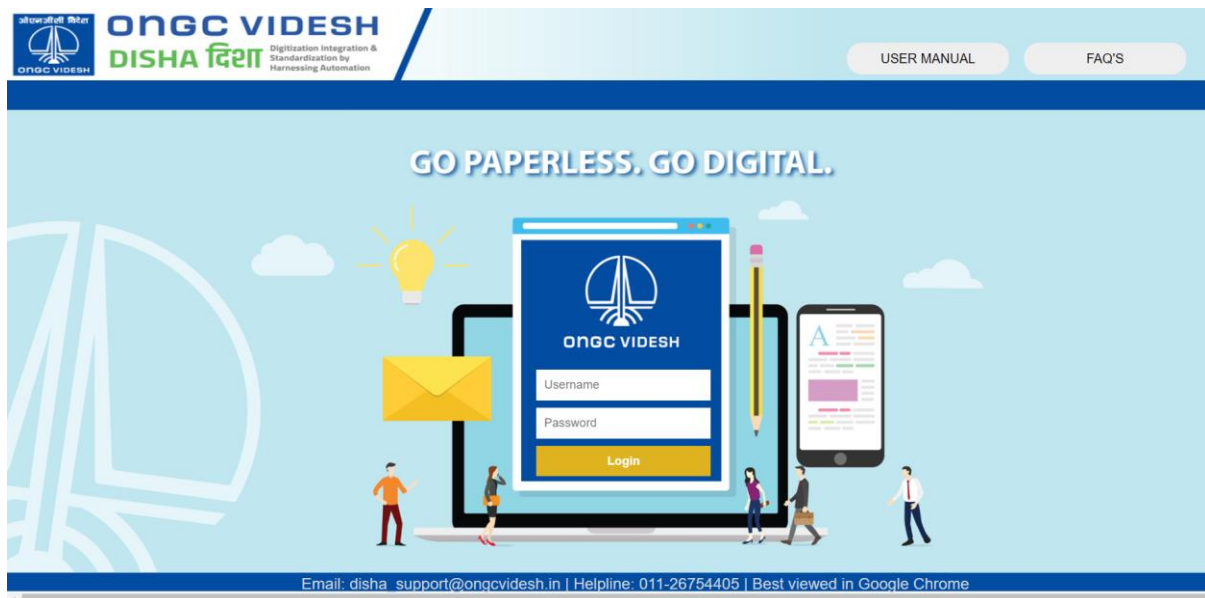
Approved By :   100005-Test User5 (CFIN-OMD)-Director (Appolo)   Add

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.

➢ Task goes to the Reviewer/ Recommender.
➢ Login with Reviewer/ Recommender User.

7.4 Reviewer/ Recommender 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 Review/ Recommend on Select Action.
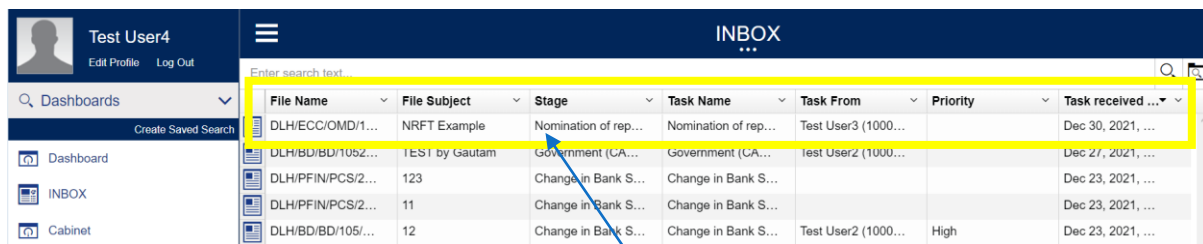➢ Click on Forward button.

Click on Forward button

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

7.5   Agree/Concurrer 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 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.

7.6 Approver Screen.

- ➢ Open the task from Inbox.

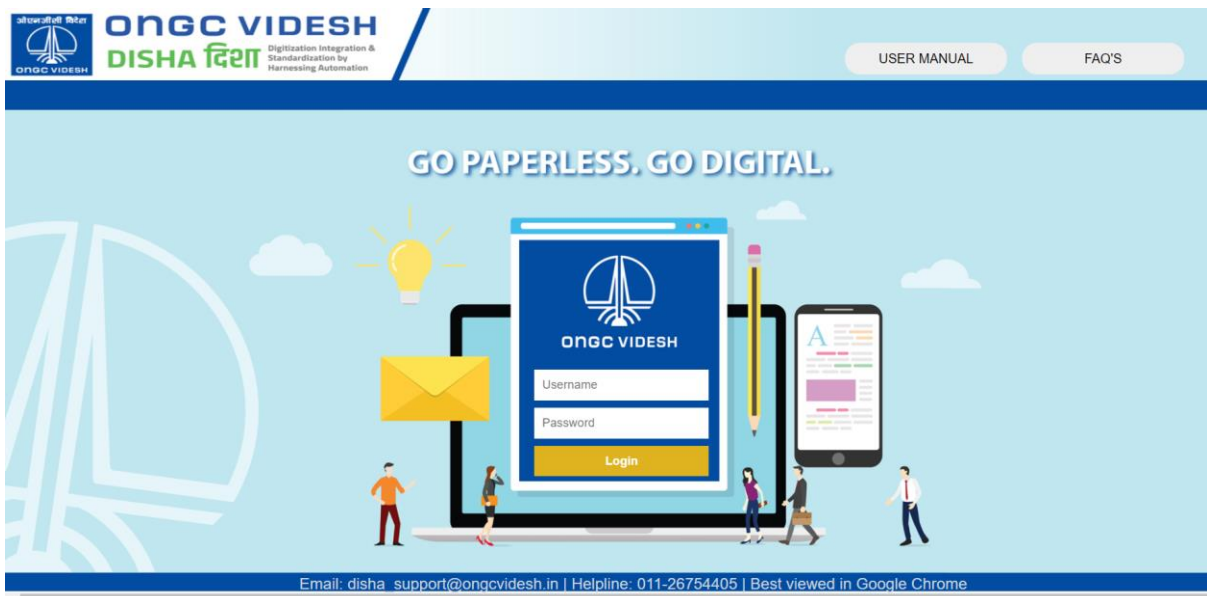| File Name	File Subject	Stage	Task Name	Task From	Priority	Task received ...
DLH/ECC/OMD/1...	NRFT Example	Nomination of rep...	Nomination of rep...	Test User4 (1000...		Dec 30, 2021, ...
DLH/CFIN/OMD/1...	Committee Appro...	Generic Committe...	Generic Committe...	Test User2 (1000...		Dec 29, 2021, ...
DLH/BD/BD/1052...	ss	Partner Audit Proc...	Partner Audit Pro...	Test User5 (1000...		Dec 29, 2021, ...
DLH/ECC/OMD/1...	ia	Investment Appro...	Investment Appro...	Test User3 (1000...		Dec 29, 2021, ...
DLH/ECC/OMD/1...	Test SIgn 2	Investment Appro...	Investment Appro...	Test User3 (1000...		Dec 27, 2021, ...
DLH/ECC/OMD/1...	Test Sign			Test User3 (1000...		Dec 27, 2021, ...

Task is visible in Inbox

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

➢ 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

- Once Approved Office order is created and circulated to all nominated members via Email.

ONGC VIDESH LIMITED

CIN: U74899DL1965GOI004343 Website : www.ongcvidesh.in
Deendayal Urja Bhavan, Plot No. 5A- 5B, Vasant Kunj, Nelson Mandela Marg, New Delhi-110070
Fax : +91 1126129345/46 Phone : +91 11 26129344

Office Order

| File No: | DLH/ECC/OMD/10031/00004 | Date: | 30.12.2021 02:44:11 PM |

Competent authority has accorded approval for tour to Russia of following officer as per detailed below:

Sr.No.	Name,CPF No &Designation	Period of Deployment	Purpose
1	Test User3 (100003)-General Manager (Production)	30.12.2021 to 31.12.2021	Foreign trip for project document signing.

Remarks:

- Above period does not include the journey period.
- Necessary action may be taken for issuing tickets,foreign exchange etc.

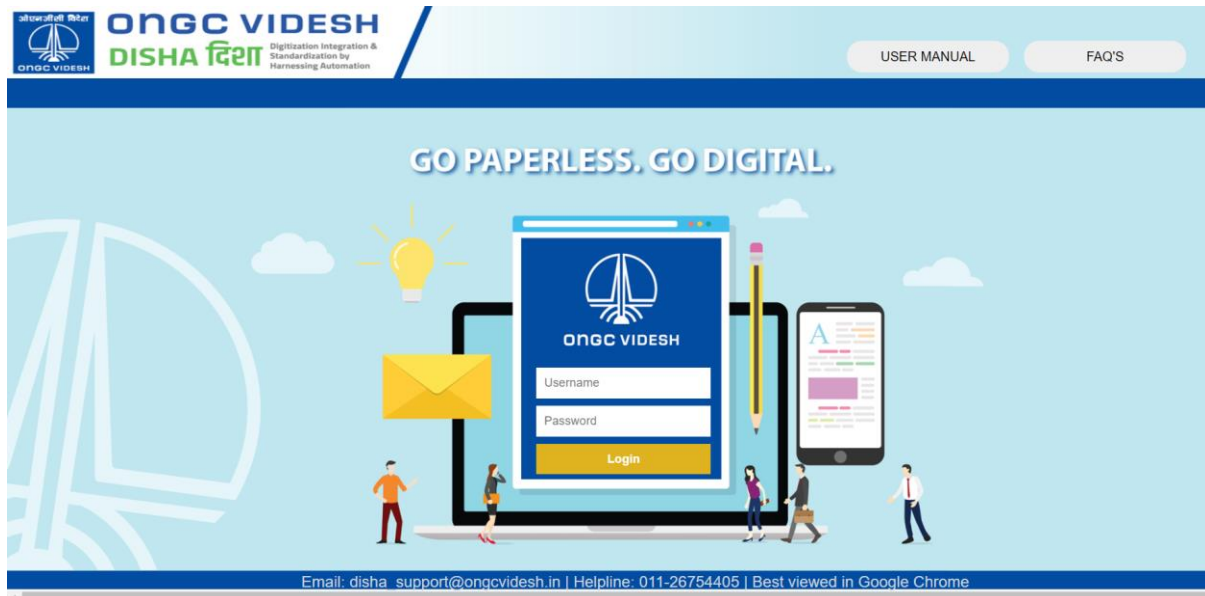**Forwarded &Electronically Signed By**

Test User1 (100001)-CORP

Distribution through mail:

1. Individual Concerned
2. Country Manager, Russia
3. EA to MD/D(E)/D(F)/D(O)
4. RP Russia -BU
5. Head Corporate Finanace
6. HR &Finance for ticket and FE

- ➢ Task goes to the Initiator.
- ➢ Login with Initiator User.

7.7   Initiator Screen.

- ➢ Open the Task from Inbox.

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

> Click on Send to Cabinet Button.

Click on Send to Cabinet button

> File send to Cabinet box can be opened.
> Click on Yes button.

Click on Yes button

> Task goes to the Cabinet of Initiator.

7.8 Cabinet Screen

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

Click on Cabinet button on the process list panel

Click on Open button.

➢ Now you can see all the data of user.
➢ In Notes Sheet(s) section click on actions icon to open Notes sheet(s).

Subject	By	Status	Date	Actions
Note Sheet 1	100001	Signed	30.12.2021	🔍

Note Sheet(s)

Showing entry 1 of 1 entries

Previous 1 Next

View Notes Sheet(s)

➢ Notes Sheet(s) will open.

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

#	Description	By	P. No	Date	Action

Showing 0 entries   Previous   Next

➤ Select File Workflow using radio selection button.

	Workflow	Created By	Created On	Updated On
○	File Workflow 1	Test User1 (100001)-Director (Finance)	28.12.2021	28.12.2021

File Workflow

Showing entry 1 of 1 entries   Previous   **1**   Next

➤ Workflow Members will be shown.

Workflow Members

Member Type	Member Name
Reviewer / Recommender	Test User3 (100003)-General Manager (Production)
Agree / Concurrer	Test User4 (100004)-Country Manager-Brazil
Approver	Test User5 (100005)-Director (Appolo)

Exit

➤ File Action contains Exit, History and Send for Review options.

File Action

Exit   History   Send For Review

➤ Exit is used to exit the opened file.
➤ History shows the Movement History of the file.

Cabinet

Movement History

File No :
DLH/ECC/OMD/10031/00004

Subject :
NRFT Example

Per page: 10

Date	Stage	From	To
30.12.2021 01:19:11 PM	Nomination of representative for Foreign Trip Initiator	Test User1 (100001)-Director (Finance)	Test User2 (100002)-Senior Finance & Accounts Officer
30.12.2021 02:13:34 PM	Nominated	Test User2 (100002)-Senior Finance & Accounts Officer	Test User1 (100001)-Director (Finance)
30.12.2021 02:36:17 PM	Nomination of representative for Foreign Trip Initiator	Test User1 (100001)-Director (Finance)	Test User3 (100003)-General Manager (Production)
30.12.2021 02:43:43 PM	Review / Recommend	Test User3 (100003)-General Manager (Production)	Test User4 (100004)-Country Manager-Brazil
30.12.2021 02:48:13 PM	Agree / Concur	Test User4 (100004)-Country Manager-Brazil	Test User5 (100005)-Director (Appolo)
30.12.2021 02:51:10 PM	Approve	Test User5 (100005)-Director (Appolo)	Test User1 (100001)-Director (Finance)
30.12.2021 02:55:30 PM	Nomination of representative for Foreign Trip Initiator	Test User1 (100001)-Director (Finance)	To Cabinet

Showing 1 to 7 of 7 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

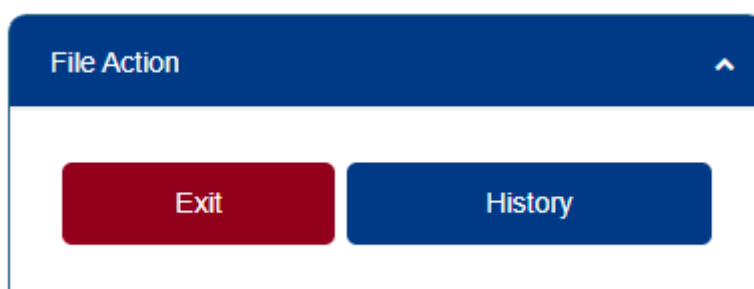Forward   Exit

Click on Forward button

7.9   Outbox Screen

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

Click on Open button

➢ This is user Outbox screen.

➢ Click on History button.

File Action ⌃

| Exit | History |

➢ Movement History box will be opened.
➢ Show all the details of user.
➢ If you want to close, then click on close button.

Outbox
...

Movement History

File No :
DLH/ECC/OMD/10031/00004

Subject :
NRFT Example

Per page: 10

Date	Stage	From	To
30.12.2021 01:19:11 PM	Nomination of representative for Foreign Trip Initiator	Test User1 (100001)-Director (Finance)	Test User2 (100002)-Senior Finance & Accounts Officer
30.12.2021 02:13:34 PM	Nominated	Test User2 (100002)-Senior Finance & Accounts Officer	Test User1 (100001)-Director (Finance)
30.12.2021 02:36:17 PM	Nomination of representative for Foreign Trip Initiator	Test User1 (100001)-Director (Finance)	Test User3 (100003)-General Manager (Production)
30.12.2021 02:43:43 PM	Review / Recommend	Test User3 (100003)-General Manager (Production)	Test User4 (100004)-Country Manager-Brazil
30.12.2021 02:48:13 PM	Agree / Concur	Test User4 (100004)-Country Manager-Brazil	Test User5 (100005)-Director (Appolo)
30.12.2021 02:51:10 PM	Approve	Test User5 (100005)-Director (Appolo)	Test User1 (100001)-Director (Finance)
30.12.2021 02:55:30 PM	Nomination of representative for Foreign Trip Initiator	Test User1 (100001)-Director (Finance)	To Cabinet

Showing 1 to 7 of 7 entries

Previous **1** Next

Close

Click on Close button

--End of Document--