NewgenONE

Business Workspace

Administration Guide

Version: 2024.2

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Contents

Preface

This chapter provides information about the purpose of this guide, details on the intended audience, revision history, and related documents for NewgenONE Business Workspace.

Revision history

Revision date	Description
November 2024	Initial publication

About this guide

This guide contains administrative tasks related to business-level activities in NewgenONE. These activities include assigning object-level rights to users and groups, managing processes registered on the cabinet, configuring application settings, managing queues, specifying rule criteria, and generating audit logs.

To ensure you are referring to the latest and most recent revision of this guide, download it from one of the following locations:

- Newgen Internal Doc Portal, if you are a Newgen employee.
- Newgen Partner Portal, if you are a Newgen partner.

Intended audience

This guide is intended for business administrators who monitor and manage business-level activities such as processes, queues, object rights for users and groups, users, criteria, and application configuration.
Ensure that users have sufficient rights available to configure and manage the various settings available in NewgenONE Business Workspace.

Related documents

The following documents are related to NewgenONE Business Workspace:

- NewgenONE Overview Guide
- NewgenONE Process Designer User Guide
- NewgenONE Workspace User Guide
- NewgenONE System Admin Administration Guide

Documentation feedback

To provide feedback or any improvement suggestions on technical documentation, write an email to docs.feedback@newgensoft.com.

To help capture your feedback effectively, share the following information in your email:

- Document name
- Version
- Chapter, topic, or section
- Feedback or suggestions

Introduction

NewgenONE Business Workspace is a workspace for performing business-related administrative tasks. Here, you can track the requests, perform admin-related operations such as adhoc routing and unlocking, define rights and manage the business processes, monitor queues for efficient workflow, and generate audit logs for monitoring the activities.

Apart from this, Business Workspace offers configurable dashboards that enable you to view customized information related to queues and workitems.

Getting started with NewgenONE Business Workspace

This chapter describes how to get started with NewgenONE Business Workspace:

- Signing in to NewgenONE Business Workspace
- Exploring NewgenONE Business Admin Workspace

Signing in to NewgenONE Business Workspace

To sign in to the Business Workspace, perform the following steps:

1. Open a web browser.
2. In the browser address bar, enter the NewgenONE URL in the following format:

Condition	URL format
General	*http or https://<domain or IP address>:<Port>/workspacestudio/* Here, *<domain or IP address>* represents the location of the server hosting NewgenONE applications, and *<Port>* represents the port number on the server where the NewgenONE services are hosted. For example: • Using a domain name: *http or https://sample.com/workspacestudio/* • Using an IP address: *http or https://1XX.1XX.0.X:80XX/workspacestudio/*

Condition	URL format
If Single sign-on (SSO) is enabled.	*http or https://<domain or IP address>:<Port>/newgensso/workspacestudio/* Here, *<domain or IP address>* represents the location of the server hosting NewgenONE applications, and *<Port>* represents the port number on the server where the NewgenONE services are hosted. For example: • Using a domain name: *http or https://sample.com/newgensso/workspacestudio/* • Using an IP address: *http or https://1XX.1XX.0.X:80XX/newgensso/workspacestudio/*

The NewgenONE sign-in page appears.

3. Enter the following details:

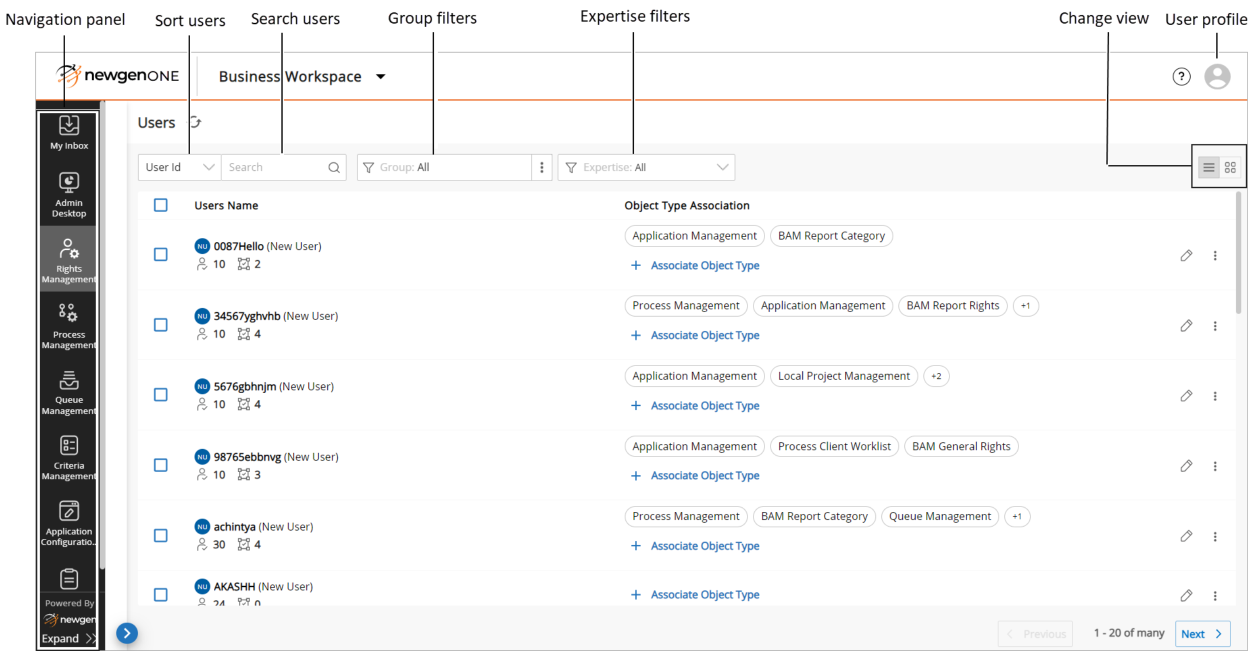
Field	Description
Username	Enter the name of the NewgenONE user.
Password	Enter the password associated with the username.
Cabinet	Select a suitable cabinet from the dropdown list.
Remember me	It allows preserving your sign-in details.

4. Click **Login** to start the session.
   On successful sign-in, the My Inbox page appears.
5. On the upper-left corner of the page, click the dropdown arrow and select **Business Workspace**.
   The Business Workspace page appears.

Exploring NewgenONE Business Workspace interface

On accessing the Business Workspace, the Rights Management page appears by default. This page consists of a navigation pane on the left for easy navigation between the tabs. On the upper-right, click your **User Profile** to see your signed-in details.

Furthermore, you can navigate through the elements of the business workspace user interface using the Tab key.

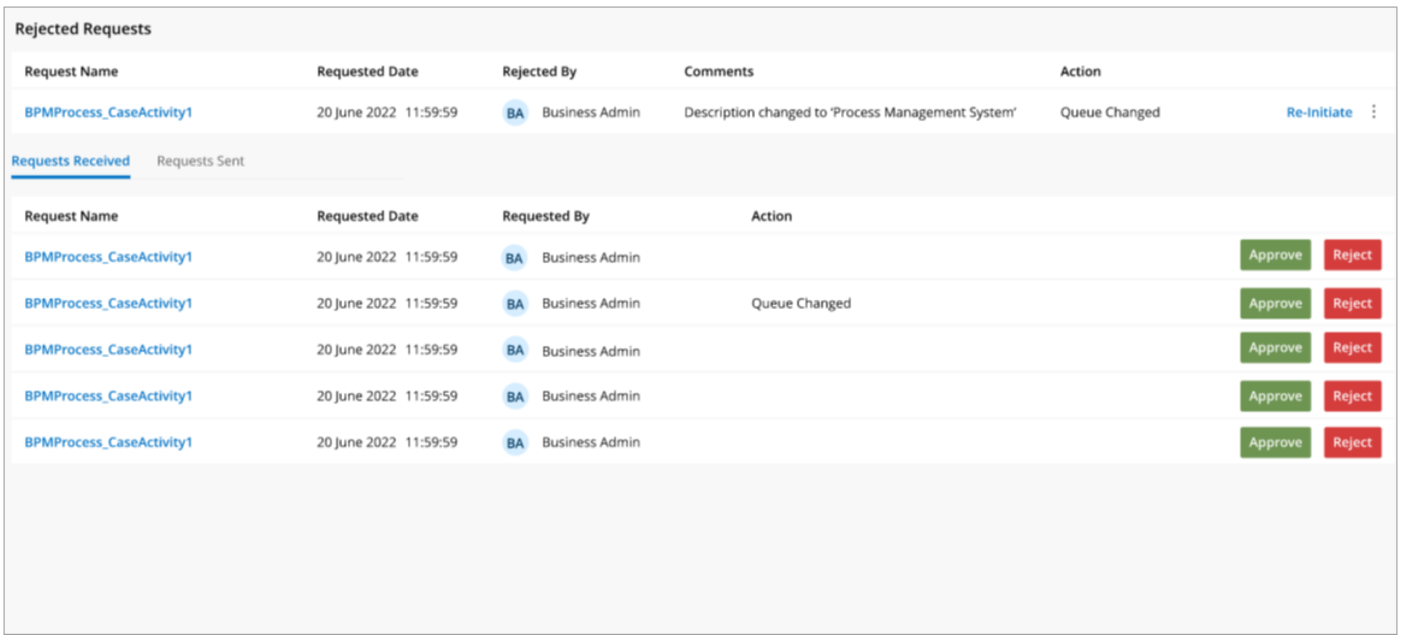


These are the different tabs available in the navigation pane of the NewgenONE Business Workspace.

- My Inbox
- Admin Desktop
- Rights Management
- Process Management
- Queue Management
- Criteria Management
- Application Configuration
- Audit Log

My inbox

The My Inbox tab allows an administrator to manage and track the requests. The administrator can view the received requests, sent requests, and rejected requests. He can accept or reject a raised request. Furthermore, he can also re-initiate a rejected request.



These are the different sections available on the My Inbox page:

- **Requests Received**: Displays the request you have received for approval. You can either accept or reject the request. The rejected request appears under the Rejected Requests section.
- **Requests Sent**: Displays the request you sent for approval.
- **Rejected Requests**: Displays the request you have rejected.

Accepting request

To accept a request, perform the following steps:

1. On the My Inbox page, go to **Request Received** section. This section displays a list of received requests along with their corresponding name, requested date, requester, and action description.
2. Click **Approve** next to the request you want to approve. The Approve dialog appears.
3. Enter a comment and click **Approve**. The accepted request no longer appears in the Request Received section.

Rejecting request

To reject a request, perform the following steps:

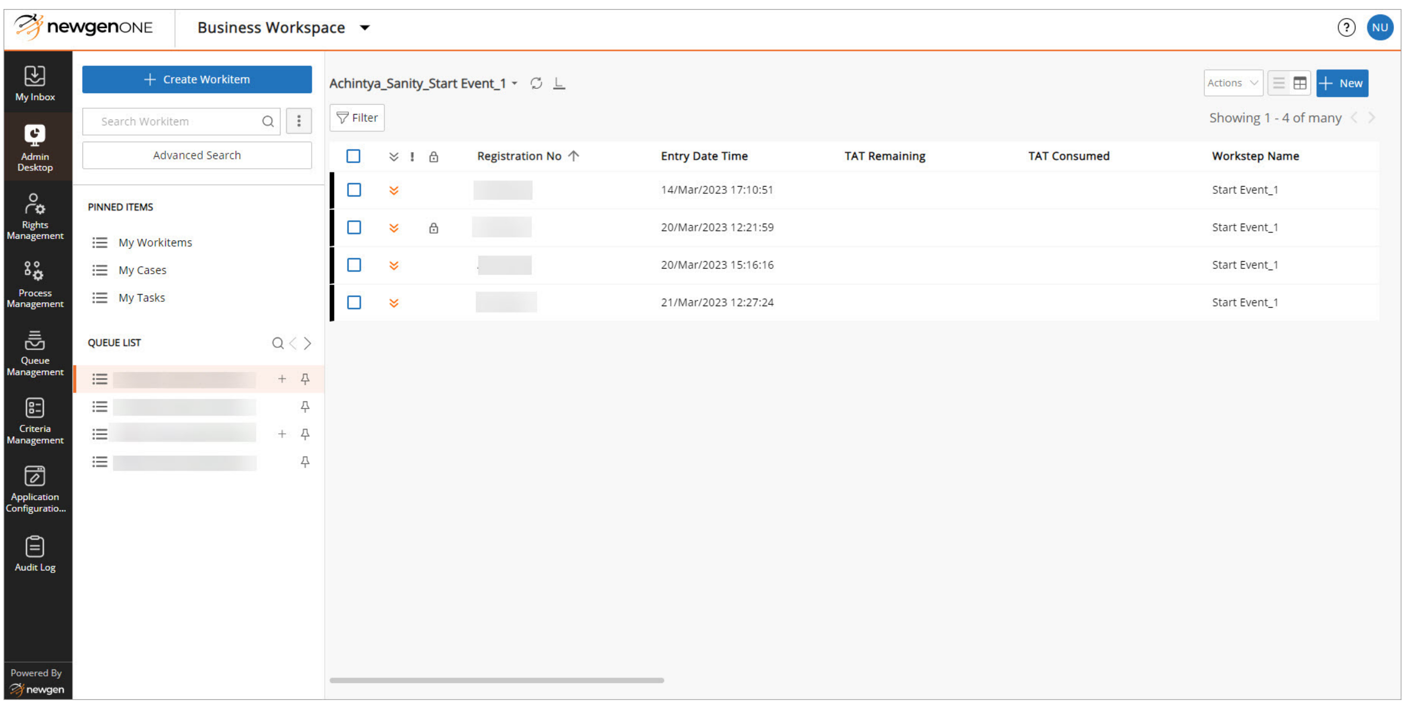
1. On the My Inbox page, go to **Request Received** section. This section displays a list of received requests along with their corresponding name, requested date, requester, and action description.
2. Click **Reject** next to the request you want to reject. The Reject dialog appears.
3. Enter a comment and click **Reject**. The rejected request now appears under the Rejected Requests section.

Admin desktop

The Admin Desktop tab lets you perform admin-related operations such as adhoc routing and unlocking of workitems. For the rest of the functionalities, see *NewgenONE Workspace User Guide*.

Unlike Workpace, the **Release** option in Admin Desktop is available for all the workitems.

The admin desktop provides a workspace to view queues and manage their corresponding workitems. You can view the basic information about each workitem and apply multiple operations to it, such as initiation, specify priority, set reminder, attach form, and many others. It also allows you to create, search, and apply filters on the workitems. For complex workitem searches, you can use the advanced search functionality.



Adhoc routing

Adhoc routing is a mechanism that lets you move or route a workitem from one workstep to another without user intervention.

Suppose there is an exceptional workitem that is not required to flow through the entire chain of worksteps but is to be directly routed to any step in the process, thus jumping the routing sequence. In such a situation, rights are given to directly route the workitems from any step in the process to any other workstep, in an adhoc manner. This type of routing is called adhoc routing.

To route a workitem, perform the following steps:

1. On the Admin Desktop page, select a queue from the Queue List. You can see a list of related workitems appear on the right.
2. Select the workitem you want to route, and click **Adhoc**. The Adhoc Routing dialog appears.
3. Select the target workstep where you want to route the current workitem.
4. Provide a comment, and click **Adhoc**.

Unlocking workitem

A workitem gets locked when a user is currently working on the workitem or does not complete the workitem. For example, in a loan approval process, a manager is working on a workitem awaiting his approval. However, due to some urgent meeting, he gets occupied and forgets to approve the workitem. In such a case, the administrator can unlock the workitem and approve it. Thus, helping to avoid delays in the approval process.

To unlock a workitem, perform the following steps:

1. On the Admin Desktop page, select a queue from the Queue List. You can see a list of related workitems appear on the right.
2. Select the workitem you want to unlock. A lock icon appears next to the locked workitem.
3. Click **Unlock**. The workitem gets unlocked.

> You cannot unlock a workitem if the locked period is less than an hour.

Rights management

The Rights Management tab in Business Workspace allows you to create different profiles and associate them with different groups and users based on your business requirements.

For example, a business user who wants to create, view, or edit productivity and SLA-related reports. He can grant rights to generate, modify, and delete reports. This operation is accessible through the Business Workspace.

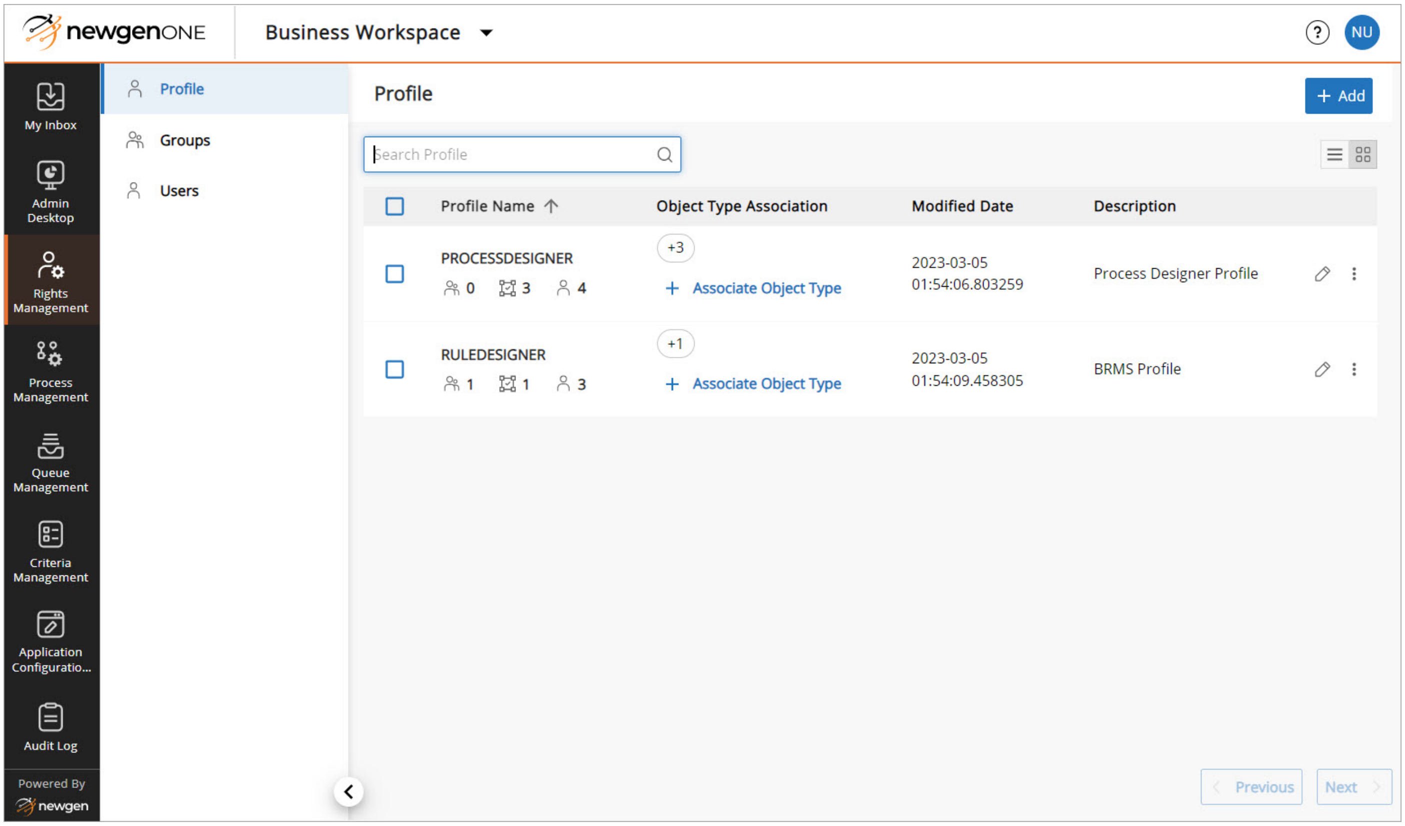
- **Profile** — A collection of folders, files, and configuration settings that define the environment for a user in NewgenONE. For example, the marketing and development profiles in an organization.
- **Group** — A collection of users with similar rights and responsibilities. For example, finance and sales groups in an organization.
- **User** — A person who uses the system. For example, John, Maria, and Linda.

Related topic(s)

- Creating and managing profiles
- Managing groups
- Managing user object rights

Creating and managing profiles

This chapter describes how to create and manage profiles in the NewgenONE Business Workspace. To view profiles, navigate to the **Rights Management** tab and select **Profiles** from the left pane. You will see a list of profiles created in the signed-in cabinet on the right.



Use the search functionality to find a particular profile in the list by its name. You can also change the view by clicking the **List View** or **Compact View** toggle on the upper-right corner of the page. By default, Compact View is selected.

Related topic(s)

- Adding profile
- Modifying profile
- Assigning data objects

Adding profile

Creating a profile is generally composed of five major steps:

- Defining basic details for the profile
- Associating object types with profile
- Associating groups with the profile
- Associating users with the profile

To add a profile, perform the following steps:

1. Select **Profiles** from the left panel on the Rights Management tab. It displays a list of registered users on the current cabinet.
2. Click **Add** to create a new user profile. The Basic Details page appears.

Basic Details

3. Enter the following details on the page:

Field	Description
Profile Name	Enter the name of the profile.
Description	Enter information about the profile.

4. Click **Next**. The Object Type Association page appears. This page contains three sections – Select Object Type(s), Selected Right(s), and Selected Object Type(s) Preview.

Object Type Association

5. From the **Select Object Type(s)** section, choose the required object types to assign to the profile.
6. Then, select the suitable rights for the chosen object type, and click **Add**. To select all the rights, select **Check All**.
   The chosen object type now appears under the Selected Object Type(s) Preview.
7. To add another object type, repeat steps 5 and 6.
8. Click **Next**. The Group Association page appears.

Group Association

9. Select the group(s) to associate with the profile. To select all the groups in the list, click **Select All**.
   The chosen group(s) appear under the Selected Group(s) section. To change the assignment type for the group, click the **Edit**, and choose the required option. By default, the assignment type for a group is set to Permanent Assignment.
   In order to assign objects to an object type, click the icon. For more information, see Assigning data objects.
10. Click **Next**. The Role Association page appears.

User Association

11. Select the required users(s) to associate with the profile. The chosen user(s) appear under the Selected User(s) section. To select all the users in the list, click **Select All**.
    In order to assign objects to an object type, click the icon. For more information, see Assigning data objects.
12. Click **Save**. The newly created profile now appears in the profile list.

Modifying profile

You can modify the existing configurations for a profile such as its basic details, associated object types, associated groups, and associated users. To change profile properties, go to the **Rights Management** tab and then select **Profile** from the left pane. It will display all the registered profiles on the cabinet. Then, click **Modify** and navigate to the required tab to make the changes, and click **Save** to confirm.

For procedural details, see Adding profile.

To delete a profile, click **More Options** next to the profile name and then select **Delete**. Alternatively, select the checkbox(es) next to the required profile(s) and then click **Delete** in the upper-right corner of the page. In the Delete dialog that appears, provide a reason for the profile(s) deletion, and then click **Delete**.

Updating object type rights

There are two ways to update rights for an object type. On the Profiles page, click **Modify** and navigate to the **Object Type Association** tab, and perform any of the following steps:

- To update rights for a specific object type, click the **Expand** toggle next to it. You can now view all the associated rights for the object type. Based on your requirements, select or unselect the required rights. To collapse the object type, click the **Collapse** toggle.
- To update rights for multiple object types, click the **Expand All** toggle on the upper-right corner of the page. You can now view all the associated rights for all

the object types. Based on your requirements, select or unselect the required rights for the object types. To collapse the object type, click the **Collapse All** toggle.

To confirm the changes, click **Save**.

Adding data objects

Data objects can be assigned to groups and users during the profile modification process. Once you click the **Modify** icon on the Profiles page, use the following ways to add data objects:

- To add a data object to a group, navigate to the **Group Association** tab and click the **Objects Assigned** icon next to the required group name.
- To add a data object to a user, navigate to the **User Association** tab and click the **Objects Assigned** icon next to the required object type.

For procedural details, see Assigning data objects.

Assigning data objects

Data objects can be assigned to groups and users during the profile creation process. For more information, see Adding profile.

- To assign a data object to a group, go to the **Group Association** page and click the icon next to the required group under the Selected Group(s) section.
- To assign a data object to a group, go to the **User Association** page and click the icon next to the required user under the Selected User(s) section.

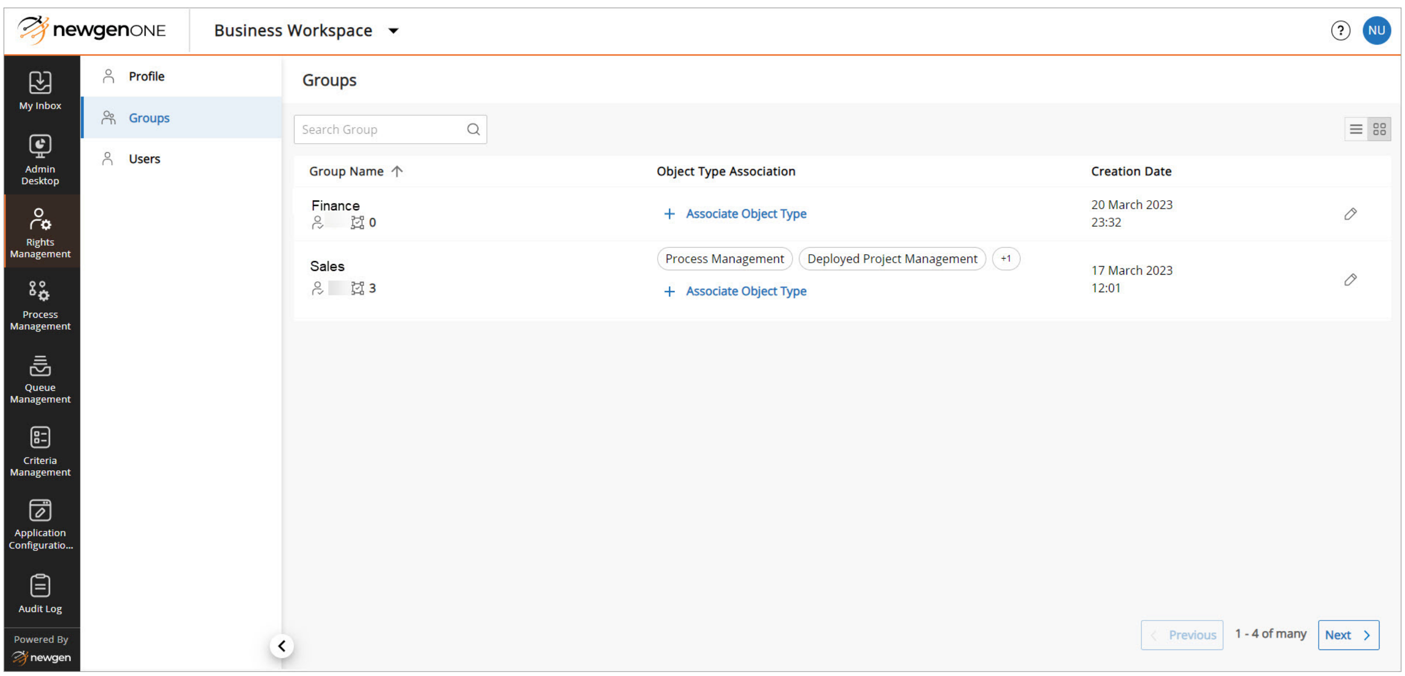
When you click the icon, the Assign Object dialog appears. To assign a data object to the required group or profile, perform the following steps:

1. Choose the object type you want to assign from the **Select Object Type(s)** dropdown. Depending on the chosen object type, its corresponding objects appear under the Object Name section.

2. Select the desired objects in the list or use the search box to look for a particular object. To choose all the objects in the list, click **Select All**.
   The added objects appear under the Selected Object Name section.
3. Click **OK** to save the changes.
4. *(Optional)* To add more data objects, repeat the above steps.

Managing groups

This chapter describes the different ways to manage groups in the NewgenONE Business Workspace. These groups are created using the NewgenONE System Admin. To manage groups, navigate to the **Rights Management** tab and select **Groups** from the left pane. You will see a list of created groups in the signed-in cabinet on the right.



Use the search box to find a particular group in the list. You can also change the view by clicking the **List View** or **Compact View** icon on the upper-right corner of the page. By default, Compact View is selected.

Related topic(s)

[Modifying groups]

Modifying groups

You can modify the existing configurations for a group such as its associated object types and profile. To change the properties for a group, go to the **Rights Management** tab and then select **Group** from the left pane. It will display all the registered groups on the cabinet. Then, click **Modify** and navigate to the required tab to make the changes, and click **Save** to confirm.

Related topic(s)

- Adding data object
- Updating object type rights

Adding data object

Data objects can be assigned to object types and profiles during the group modification process. Once you click the **Modify** icon on the Groups page, use the following ways to add data objects:

- To assign a data object to an object type, navigate to the **Object Type Association** tab and click the **Assign Objects** icon next to the required object type.
- To assign a data object to a profile, navigate to the **Profile Association** tab and click the **Objects Assigned** icon next to the required object type. In the Assigned Object dropdown that appears, click **Assign**.

For procedural details, see Assigning data objects.

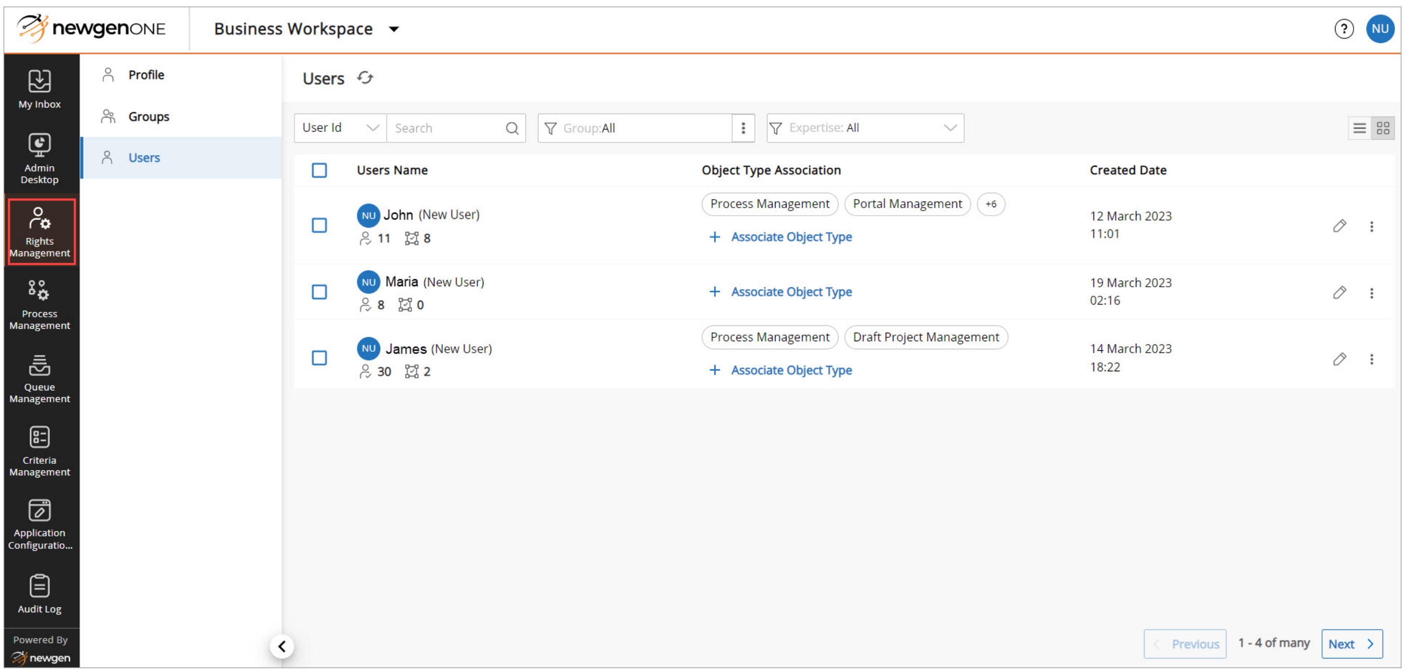
Updating object type rights

The process for updating rights for data objects in groups is similar as explained in Updating data object rights for profile.

Managing user object rights

This chapter describes the different ways to manage the object rights of the users in the NewgenONE Business Workspace. These users are created using the NewgenONE System Admin. To manage user object rights, navigate to the **Rights Management** tab and select **Users** from the left pane. You will see a list of created users in the signed-in cabinet on the right.

For more information, see *NewgenONE 2024.1 System Admin Administration Guide*.



Use the search functionality to find a particular user in the list by its name. You can also apply a filter to view users belonging to certain groups or having certain expertise or rating. To change the view of the users, click the **List View** or **Compact View** toggle on the upper-right corner of the page. By default, Compact View is selected.

Related topic(s)

- Modifying user object rights
- Applying operations to users

Modifying user object rights

You can modify a user's existing configurations, such as its associated object types and profile. To change the properties for a user, go to the **Rights Management** tab and then select **User** from the left pane. It will display all the registered users on the cabinet. Then, click **Modify** , navigate to the required tab to make the changes, and click **Save** to confirm.

Related topic(s)

- Adding data object
- Updating object type rights

Updating data object rights

The process for updating rights for data objects in users is similar as explained in Updating data object rights for profile.

Adding data object

Data objects can be assigned to object types and profiles during the user modification process. Once you click the **Modify** icon on the Users page, use the following ways to add data objects:

- To assign a data object to an object type, navigate to the **Object Type Association** tab and click the **Assign Objects** icon next to the required object type.
- To assign a data object to a profile, navigate to the **Profile Association** tab and click the **Objects Assigned** icon next to the required object type. In the Assigned Object dropdown that appears, click **Assign**.

For procedural details, see Assigning data objects.

Applying operations to users

These are the different operations you can apply on a user through NewgenONE Business Workspace:

- Rating user
- Adding user to queue
- Setting diversion
- Setting work audit
- Viewing work audit details

Rating user

NewgenONE Business Workspace allows you to rate the users based on the defined expertise. For example, you can rate the users based on their programming skills. You can rate them on a scale of 1 to 5 stars. The higher the user rating, the better their performance.

To rate a user, perform the following steps:

1. On the Users page, click **More Options** ⋮ next to the user you want to rate. The Rate User dialog appears. It lists the different expertise based on which you can rate a user.
2. Give the user rating for the desired expertise. In case there is no expertise added, perform the following steps:
   a. Click **Add Expertise** in the upper-right corner of the dialog.
   b. Input the expertise name in the required text box.
   c. Then, click **Define** to save. The expertise gets added. You can now rate the user based on the added expertise.
3. Click **Save** to confirm.

Adding user to queue

In a workflow system, there are chances when the load on a particular workstep increases. To handle such scenarios, the administrator can temporarily or permanently assign the extra users to the queue associated with that workstep.

For example, in an account opening process, the number of applications is huge and the users at the Data Entry workstep are facing difficulty in manually entering the information of all these applications. In this case, the administrator can temporarily or permanently assign some of the users from other queues (associated with other worksteps in the process) to the Data Entry queue, thereby decreasing the load there.

To add a user to the queue, perform the following steps:

1. On the Users page, click **More Options** ⋮ next to the user you want to add to a queue. The Add User to Queue dialog appears. It lists the different queues available in the signed-in cabinet. Alternatively, select the desired user and click **Add to Queue** in the upper-right corner of the page.
2. Select the queue from the list. You can also find a queue by typing its name in the search box.
3. Specify whether you want to assign the queue to the user temporarily or permanently.
    - For permanent basis, set the **Assignment Type** to Permanent Assignment.
    - For temporary basis, set the **Assignment Type** to Temporary Assignment and specify the due date using the date picker.
4. Click **Save** to confirm.

Setting diversion

For balancing the workload or handling volume anomalies, an administrator can divert the workitems allotted to a particular user to another for a certain amount of time. This is useful in scenarios when a user is absent or unavailable to work on workitems.

For example, John is an employee working in ABC organizations. He is currently working on 3 assigned tasks and has 7 more tasks aligned for the upcoming week. However, due to some personal urgency, he is unavailable for the next week. In such a case, the team manager can assign his current and aligned tasks to his coworker, Hardin to handle the workload till John joins back.

To set diversion for a user, perform the following steps:

1. On the Users page, click **More Options** ⋮ next to the required user and select **Set Diversions** from the list. The Set Diversions page appears.
2. Under the Assigned To section, select the user to whom you want to assign the selected user's workitems.
   You can search for specific users and groups based on the user name or personal name. Click the **Group Filter** icon to filter users based on the groups they belong to.
3. Click the ⋮ next to the **Process Name** text box to select the process for the assigned user.
4. Click the ⋮ next to the **Workstep** text box to select the workstep for the assigned user.
5. Specify the date and time up to when the assigned user must work on the diverted workitems. Use the date and time picker to set the date and time.
6. Select **Include current Workitems** to add the current workitems of the user to the diverted user.
7. Select **Assign back diverted Workitems** to allocate back the workitems to the assigned user if the specified time period gets over.
8. Click **Save** to confirm.

Setting work audit

NewgenONE provides support for percentage-based work audits to review the performance of the users by the auditors. For example, when a new user joins an organization, you can set his percentage of audit to 100%. But as the user gains work experience, you can decrease or remove the work audit percentage. It also helps to evaluate the performance appraisal of the employees.

Once you set the audit for a user, the percentage of workitems completed by the user gets routed to the auditor for reviewing purposes. During the audit, the auditor can either approve or reject the workitems. If the work item gets rejected, it routes back to that user. If the workitem gets approved, it moves to the next workstep defined in the process.

To set work audit for a user, perform the following steps:

1. On the Users page, click **More Options** ⋮ next to the required user.
2. Select **Set Work Audit** from the list. The Set Work Audits page appears.
3. Specify the process name, workstep name, auditor name, and percentage of audit using the corresponding dropdowns.
4. Click **Add**.
5. *(Optional)* To add another work audit for the user, repeat steps 3 to 4.

Work audit details

Work audit details provide information on the process name, workstep name, auditor name, audit status, and audit date. Use this option to check the audit status, that is, whether the assigned task, is approved or rejected by the auditor.

To view the work audit details, click **More Options** ⋮ next to the required user and then select **Work Audit Details**.

Managing object rights

The following table describes the rights available for different object types:

Object Type	Object Type Rights
Advance Search	View
Criteria Management	View, Modify, Delete
Data Modeller General Rights	Create Data Object, Delete Data Object
Data Object Rights	View Data, Add Data, Modify Data, Delete Data, Upload Data, View Definition, Modify Definition, Modify Data Object
Deployed Project Management	View, Delete
Draft Project Management	View, Modify, Delete, Create Process, Import Process, Audit Trail

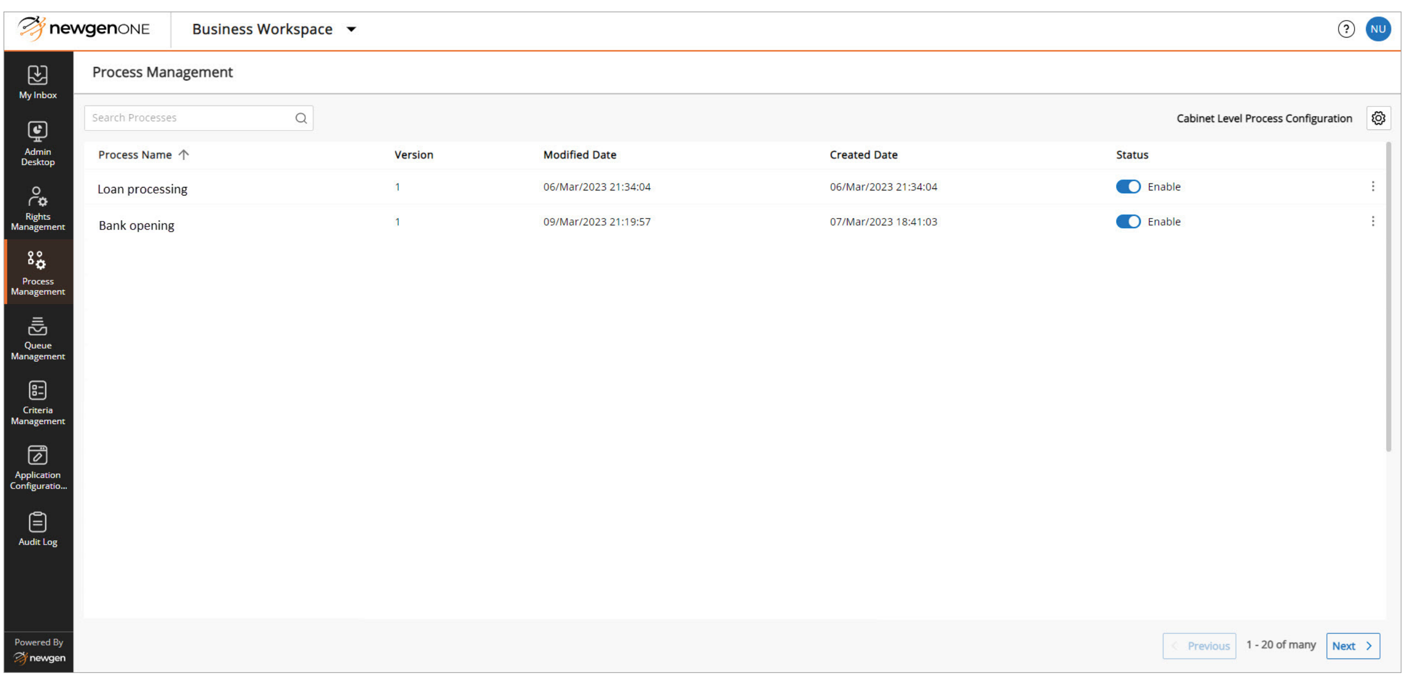
Object Type	Object Type Rights
Portal Management	View, Modify, Delete, Create, Import, Bind to Pipeline, Publish, Download, Process Mapping
Process Designer Menu Management	Save process, version, audit trail, Features, TodoList, Documents, Catalog Definition, Exception, Trigger, Register Template, Register Window, Register Trigger, Constants, External Variables, Queue Variables, Create Project, Delete Project, Create Process, Delete Process, Register Process, Import Process, Export Process
Process Management	View, Modify, UnRegister, Check-In/CheckOut/UndoCheckOut, Change State, Audit Trail, Process Report, Import Business objects
Profile General Rights	Manage profiles
Queue General Rights	Add Queue, Add User to Queue, Set User Diversion, Set User Work Audit, View Work Audit Details, Add Criteria
Queue Management	View, Delete, Modify Queue Properties, Modify Queue User, Modify Queue Activity
Report Category Rights	Delete Category, View Category
Report General Rights	Craete Report, Create Category
Report Rights	Generate Report, Modify Report, Delete Report
RuleBuilder Artifacts Rights	Create RulePackage, Create RuleFlow, View Query, View Audit Trail, Create/Modify/Delete Picklist, Download Reports, Modify Settings, Create/Modify/Delete Entity
RuleFlow Rights	View RuleFlow, Create/Modify/Delete/Association, Delete RuleFlow, Execute/Testing, Export RuleFlow/Import RuleFlow, Deploy RuleFlow, Check-OUT RuleFlow/
RuleFlowExecution Rights	Execute RuleFlow
RulePackage Rights	View Package, Create/Modify/Delete/Association, Delete Package, Execute/Testing, Export Package/Import Package, Deploy Package, Check-OUT Package/
RulePackageExecution Rights	Execute RulePackage
Transport Management	Transport Request ID
Workitem General Rights	Query List, New, Done, Initiate, Refer, Revoke, Release, Reassign, Priority, Properties, Delete, Assign To Me, Save Worklist, Reminder List, Set Reminder, Set Filter, Count Workitem, Preferences

Process management

NewgenONE Business Workspace provides a thin client user interface for administering and monitoring business processes. It facilitates managing individual processes, identifying bottlenecks in the processes, taking necessary steps to remove the bottlenecks, and improving the processes. It also enables the process owners to carry out the routine administrative tasks of changing process states, defining TAT, setting task preferences, and monitoring process configuration in an efficient manner.

For example, a business administrator can define turnaround time for an entire process or for an individual workstep to prioritize workitem completion. In this case, if a process or workstep does not get completed within the specified TAT, it will appear as delayed.

To view the Process Management page, select **Process Management** from the navigation pane. This page lists all the processes registered in the cabinet along with other additional details such as process name, version, creation date, modified date, and status.



Following is the list of operations that you can perform on the processes:

- Searching process
- Sorting process
- Changing process state
- Defining turnaround time
- Modifying constant value
- Configuring web service
- Setting task preferences
- Rename activity
- Configuring case detail variables
- Configuring case information variables
- Defining cabinet-level configuration settings
- Defining process-level configurations
- Customizing workitem layout
- Adding calendar

Searching process

To find a process, type the process name in the search box and click the search icon to view the results.

Sorting processes

Sorting helps to arrange the processes in a certain order for efficient searching. You can perform searches based on the process names, creation date, and modified date by clicking the corresponding column headers.

Click the up arrow to sort the processes in ascending order of their names, creation date, or modified date. Similarly, click the down arrow to sort the processes in descending order of their names, creation date, or modified date.

Changing process state

A defined process can either be in an enabled or disabled state. A process must be enabled to allow other users to work on it and create its corresponding workitems.

To enable or disable a process, use the status toggle and switch to the required status. As soon as you change the process state, a Comment dialog appears. Enter the comment and then click **Enable** or **Disable**.

Defining turnaround time

Turnaround Time (TAT) is the approximate time required to complete a process. It is the amount of time a workitem needs to flow through the entire process until its completion. If the process does not get completed within the TAT, it appears as delayed.
You can set the TAT for the entire process as well as for individual custom worksteps in the process.

To define the turnaround time for a process, perform the following steps:

1. On the Process Management tab, click **More Options** ⋮ next to the desired process and choose **Turnaround Time (TAT)**. Alternatively, select the required process from the list and navigate to the **Turnaround Time (TAT)** tab.
2. Specify the process turnaround time in days, hours, minutes, or seconds.
3. Select the **Would you like to "Use Calendar"** checkbox to use the calendar for calculating the turnaround time for the process.
4. Click **Save**.

To define the turnaround time for a workstep, perform the following steps:

1. On the Process Management tab, click **More Options** ⋮ next to the desired process and choose **Turnaround Time (TAT)**. Alternatively, select the required process from the list and navigate to the **Turnaround Time (TAT)** tab.
2. Specify the workstep turnaround time in days, hours, minutes, or seconds.
3. Select the **Use Calendar checkbox** to use the calendar for calculating the turnaround time for the process workstep.
4. Click **Save**.

Modifying constant value

Constant values are defined while designing a process. To change the defined value of a constant, go to the **Process Management** tab. Click **More Options** ⋮ next to the required process and choose **Constants** from the list. Alternatively, you can select the desired process from the list and navigate to the **Constants** tab.

This tab displays all the defined constants along with their corresponding values. To modify a constant value, enter the new value in the desired text box under the Constant Value column.

Configuring web service

The Web Service tab shows a list of web services or third-party integration endpoints used within the process. It allows you to modify the WSDL details for the listed web services. These web services are defined at the time of designing a process.

To modify the WSDL detail for a web service, perform the following steps:

1. On the Process Management tab, click **More Options** next to the desired process name, and then choose **Web Service** from the list. Alternatively, click the required process from the list and navigate to **Web Service** tab.
   It shows a list of web services registered for the chosen process.
2. Click **Edit** next to the required web service whose WSDL location you want to change.
3. Input the following details in the corresponding fields:

Field	Description
WSDL Location	Enter the URL of the WSDL through which the required web service can be registered in the process.
User ID	Enter the user ID that can access the entered WSDL location.
Password	Enter the password associated with the user.
Confirm Password	Re-enter the password associated with the user to confirm.

4. Click **Save** to apply the changes.

Setting task preferences

Specify task preferences to configure users and groups preferences against each task defined for a case workstep.

To configure task preferences, perform the following steps:

1. On the Process Management tab, click **More Options** ⋮ next to the desired process and choose **Task Preferences**. Alternatively, select the required process from the list and navigate to the **Task Preferences** tab.
2. Select the activity name from the list. On selecting a case workstep, all its associated tasks appear along with their names and associated users and groups.
3. To associate users and groups with a task, click the **Associate Object Type** link against the desired task. The User(s)/Group(s) Association dialog appears.
4. Click **User** to view and select users in the cabinet.
   OR,
   Click **Groups** to view and select groups.
   You can search for specific users and groups based on the user name or personal name. Click the **Group Filter** icon to filter users based on the groups they belong to. As you select the filter icon, More Options ⋮ appears. It allows you to further filter the users based on the user expertise and ratings.
   The chosen users and groups appear in the Selected User(s) and Group(s) pane.
   To select all the users or groups, click **Select All**.
5. Click **Save** to apply changes.
   The selected users and groups appear under the Group/User Association column against the task name.
6. Then, again click **Save**.

Renaming activity

To rename an activity of a process, perform the following steps:

1. On the Process Management tab, click **More Options** ⋮ next to the desired process name, and then choose **Rename Activity** from the list. Alternatively, click the required process from the list and navigate to Rename Activity tab.

In the Rename Activity tab that appears, you can view the names of all the corresponding activities of the selected process under the Activity Name header.

2. Input the new name for the activity under the New Activity Name header.
3. Click **Save** to confirm the changes.

Configuring case detail variables

Case Detail Configuration allows you to define a display name of the case data variable. Once the display name is defined, the case worker working on the case process gets to see the display name instead of the name of the actual case data variable defined during the case-type process creation.

To add a display name of the case data variable, perform the following steps:

1. On the Process Management page, click **More Options** ⋮ against the required process, and select **Case Detail Configuration** from the list. The Case Detail Configuration tab appears.
2. Select a case activity. The Case Activity dropdown contains a list of only those activities that are designed for case worksteps.
3. Select a process variable. The Process Variable dropdown contains a list of all the process variables that were created for the selected case activity during the case-type process creation.
4. Enter the display name for the process variable.
5. Click **Add** to add the display name. The process variable and its display name appear in the lower half of the page.
6. Click **Save**.

Configuring case information variables

The case information variables are the same as the case detail configuration. Here also, you can define a display name of the case data variable.

The case information variable defined here appears in the information tab as additional details for the case. The information tab appears when you open the case workitem.

To add a display name of the case information variable, perform the following steps:

1. On the Process Management page, click **More Options** ⋮ against the required process, and choose **Case Information Variable** from the list. The Case Information Variables page appears.
2. Select a case activity. The Case Activity dropdown contains a list of only those activities that are designed for case worksteps.
3. Select a process variable. The Process Variable dropdown contains a list of all the process variables that were created for the selected case activity during the case-type process creation.
4. Enter the display name for the process variable.
5. Click **Add** to add the display name. The process variable and its display name appear in the lower half of the page.
6. Click **Save**.

Defining cabinet-level configuration settings

The configuration settings define the different options available when loading a workitem.

The process configuration can be defined at the cabinet level as well as at the individual process level. When you define process configuration at the cabinet level, the defined configuration applies to all the processes in that cabinet. When you define process configuration for a process, the defined configuration applies to that process only.

To define cabinet-level configuration settings, click the **Cabinet Level Process Configuration** icon ⚙ on the upper-right corner of the Process Management page. In the Process Configuration dialog that appears, choose any of the following options:

Option	Description
Do not Load anything	Use this option to load nothing when a process workitem gets opened.

Option	Description
Load IForm from Process Specific War	Select this option to load the iform from the process-specific war file. Additionally, check the Web Application Context to specify the context for the web application. Similarly, check the Backend Application Context to specify the context for the backend application.

Click **Save** to confirm the changes.

Defining process-level configuration settings

The configuration settings define the different options available when loading a workitem. When you define process configuration for a process, the defined configuration applies to that process only.
To define process-level configuration settings, click **More Options** ⋮ next to the required process and select **Process Configuration**. For procedural details, see Defining cabinet-level configuration settings.

Customizing workitem layout

NewgenONE Business Workspace allows you to customize the workitem layout at the process level and workstep level. If you customize the workitem layout at the process level, it is applicable to all the worksteps in the process. However, if you customize the workitem layout for a particular workstep, it is applicable only to that workitem.

To customize the workitem layout, perform the following steps:

1. On the Process Management page, select the required process.
2. On the upper-left corner of the page, click **Workitem Layout Configuration**. A dialog box appears showing the default workitem view at the process level. In case, you want to customize the workitem view for a workstep, then select the required workstep from the left pane.

> The process for customizing the workitem layout at the process and workitem level are the same.

3. Click **Customize this layout**. The Customize Layout dialog appears.
4. To rearrange the tab sequencing, hold the required tab and drop it into the new location.
5. Click **Save As** to confirm the changes.

Adding calendar

To create a calendar, perform the following steps:

1. On the Process Management page, select the required process.
2. On the upper-left corner of the page, click the **Calendar** icon . The Calendar Settings dialog appear.
3. Click the plus icon next and enter the following details:

Property	Description
Name	Enter the name of the calendar.
Comments	Enter any additional information about the calendar.
Create As	Set the property to any of the following options. • If you select **Create new base calendar**, a new base calendar is created. • If you select **Make a copy of**, you need to choose a calendar from the dropdown list.

4. Then, click the **Create** button.
5. Enter the following details in the corresponding fields of the dialog:

Property	Description
Selected Date(s) Settings	Select any of the following options. • If you choose **Holiday/Partial Working**, specify the dates and working hours. • If you choose **Weekly Off/Partial Working Day**, specify the occurrence, days, and working hours. Then, click **Apply**.
Set Default Working Hours	Set the time interval for working hours.

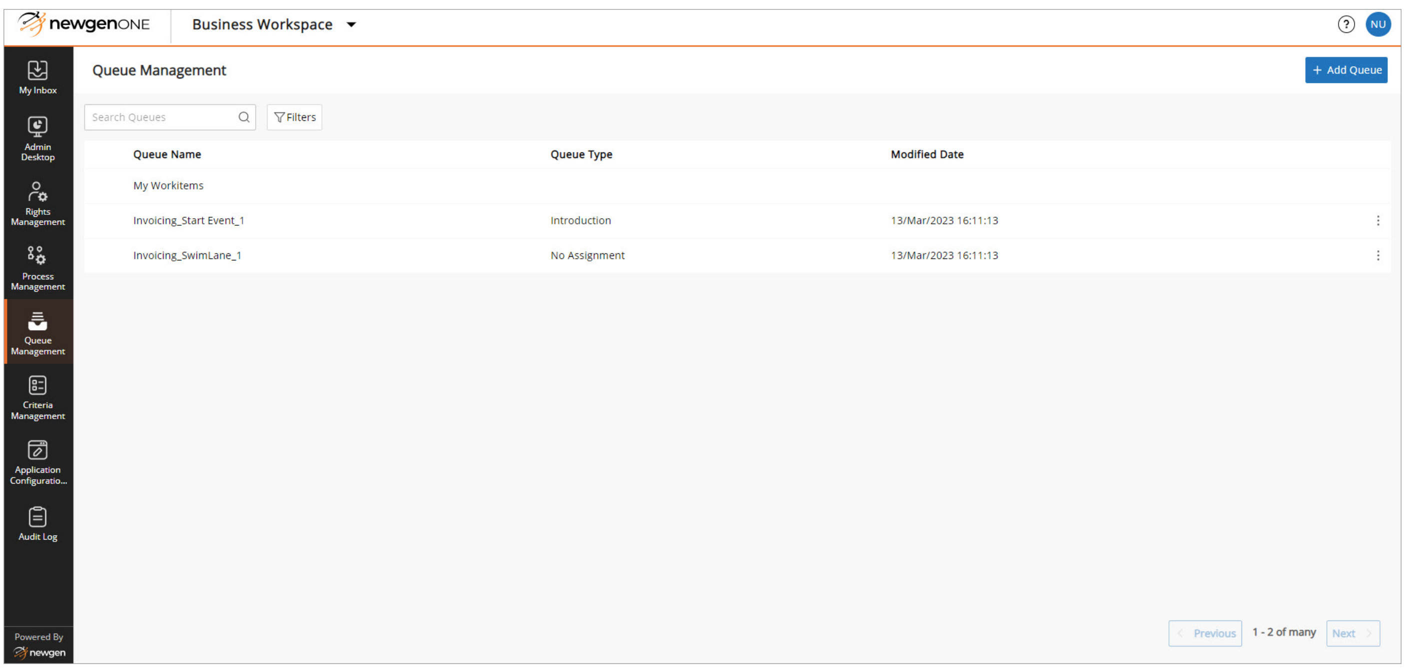
6. Click **Add**.

Queue management

NewgenONE facilitates the definition of specific users as queue managers whose primary task includes managing their business queues and monitoring them to see if work is flowing normally. Queue management facilitates the addition or deletion of users from process queues. It also includes the temporary assignment of users to queues, changing the priority of workitems, re-assigning workitems, and others.

A business administrator can add multiple users to process queues, and these users get access to workitems present in these queues. This assignment of multiple users to queue results in better task management.

To manage queues, switch to the **Queue Management** tab using the navigation pane. This page lists all the queues registered in the cabinet along with their type and modified dates.



Use the search functionality to find a particular queue in the list by its name. You can also apply filters to view queues of a particular process or type. You can also filter queues belonging to a certain time.

Adding queue

Queues can span across processes and worksteps. Multiple worksteps of different processes can be a part of the same queue. Each queue has a set of user(s) or group(s) associated with it and can process the workitems in the same queue.

To add a new queue, perform the following steps:

1. On the Queue Management tab, click **Add Queue** in the upper-right corner of the page. A new page appears displaying a list of queues on the left pane and queue configuration properties on the right. The queue configuration properties consist of general, groups, users, worksteps, column configuration, and worklist rules properties. By default, the General tab opens.

General

2. Enter the following information in the corresponding fields on the General page:

Field	Description
Queue Name	Enter the name of the queue.
Description	Add information about the queue.
Process Specific Queue	Select to associate a process specific to the queue. On selecting, the Associated Process(es) option becomes enabled. In case you select the All Processes option, then the Associated Process(es) option becomes disabled.
Associated Process(s)	Select the process you want to associate with the queue.
Fetch Workitems in order of	Specify the order in which you want to fetch the workitems. The order can be specified based on the variable.
Sorting Order	Specify the sort order in which you want to fetch the workitems.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Queue Type</td><td>Select a suitable type of queue. It can be FIFO, WIP, and global queue.
If you chose the WIP queue, then specify the following options:
Specify the assignment type for the queue:
No assignment — In this queue type, all the workitems are available only in the shared queue and are temporarily not assigned to any user in the queue. Users can process these workitems by simply connecting to the shared queue, where the entire list of items is available.
Click the Define button to specify filter condition(s) based on which you want to display the workitems in the queue. In the Define Filter dialog that appears, select the field name, operator type, value, and condition type. Then, click Add Condition. You can also write the query directly in the space provided. To save the changes, click Save.
Dynamic assignment — In this type of queue, workitems entering the queue are automatically load-balanced amongst the users and get temporarily assigned to the users. Thus, each signed-in user of this queue can see different workitems in their individual queues. Also, when the users sign in to the shared queue, they see the entire list of workitems contained in this queue
Permanent assignment — In this type of queue, the workitems are fixed and assigned to the users of the queue after load balancing. The workitems are nearly equally distributed amongst the users of this queue and are available in each of the user's individual queue or his 'My Queue'. No workitem is available in the shared queue, as they are already distributed amongst the signed-in users.</td></tr>
</table>

	◦ **Search** — In this type, you see only those workitems in the queue that matches the filter condition across the cabinet. To define the filter condition, click the **Define** button. In the Define Filter dialog that appears, select the field name, operator type, value, and condition type. Then, click **Add Condition**. You can also write the query directly in the space provided. Then, click **Save** to confirm. If you are specifying an alias variable having space between words. Then, the same has to be specified in double quotes (""). For example, if the Alias variable is emp age, the filter must be "emp age". ◦ **Allow Reassignment** — Select this checkbox to enable the reassignment operation on the queue. ◦ **Bulk workitem operations** — Select this checkbox to enable the bulk initiation of workitems in the queue. • Choose the condition for the workitem visibility: ◦ **Show all workitems** — Select this option to display all the workitems in the queue. ◦ **Show workitems where the logged-in index is equal to** — Select this option to display the workitem where the logged-in index is equal to the chosen variable. ◦ **Show workitems where logged-in index is not equal to** — Select this option to display the workitem where the logged-in index is not equal to the chosen variable.

3. Navigate to the **Groups** tab. Since you are creating a new queue, no data appears here.

Groups

4. Click **Add Group**. The Select Groups dialog appears. This dialog contains two sections:
    - Select Group(s) where you can choose the groups you want to associate with the queue.
    - Selected Group(s) where you can see the associated queues.
5. From the Select Group(s) section, choose the groups you want to associate with the queue. To associate all the groups, click **Select All**. The added groups appear under the Selected Group(s) section.
6. Click **OK** to save the changes.
7. Navigate to the **Users** tab. Since you are creating a new queue, no data appears here.

Users

8. Click the add icon on the upper-right corner of the page. The Select Users dialog appears. This dialog contains two sections:
    - Select User(s) where you can choose the users you want to associate with the queue.
    - Selected User(s) where you can see the associated queues.
9. From the Select User(s) section, choose the users you want to associate with the queue. You can search a user through its ID or name, and even apply filters based on the groups they belong to.
   To associate all the groups, click **Select All**. The added users appear under the Selected User(s) section.
10. Click **OK** to save the changes.
11. Then, navigate to the **Worksteps** tab. Since you are creating a new queue, no data appears here.

Worksteps

12. Click the add icon on the upper-right corner of the page. The Select Worksteps dialog appears. This dialog contains two sections:
    - Process name where you can choose the process you want to associate with the queue.
    - Workstep name where you can see the corresponding worksteps of the chosen process.

13. From the Process name section, choose the worksteps you want to associate with the queue.
14. Click **OK** to save the changes.
15. Then navigate to the Column Configuration tab. Since you are creating a new queue, no data appears here.

Column Configurations

This tab displays a list of variables used in the selected workstep. It displays the display name, variable name, variable type, and support for mobile display. The variable name and variable type values cannot be modified.

However, you can modify the display name of the variable by simply entering the new name in the space provided. You can also extend the support of the new column to NewgenONE Workspace for Mobile by selecting the corresponding Mobile Display checkbox.

Then, click **Save** to confirm the changes.

Worklist Rules

21. Select the variable name based on which you want to define the worklist rule.
22. Enter the alias for the variable.
23. Specify additional properties of the variables like display, sorting, and searching.
24. Then, under the Rule Definition section, define the rule expression. To add more rules, click **Add Rule**.
25. Click **Add** to save the rule.
26. Then, click **Save** to confirm.

Modifying queue

You can modify the existing configurations for a queue such as its basic details, assigned groups, assigned users, worklists, column configuration, and defined rules. To change queue properties, go to the **Queue Management** tab that shows all the queues registered in the cabinet and click **More Options** ⋮. Based on your requirement, choose the required option from the list such as General, Groups, Users, Worksteps, Column Configuration, and Worklist Rules, and make the modifications. Then, click **Save**. In the

Comment dialog that appears, enter the description about the change you made, and click **Save** again.

To delete a queue, click **More Options** ⋮ and select **Delete** from the list. In the Delete dialog that appears, provide a reason for the queue deletion, and then click **Delete**.

Filtering queues

Apply filters to display only those queues in the list that match the defined criteria. For example, you can use a filter to view only process-specific queues, workstep-specific queues, particular queue types, or queues based on their modification date.
To apply a filter, perform the following steps:

1. On the Queue Management page, click **Filters**. The Filters dialog appears on the right.
2. Enter the following details in the corresponding fields of the dialog:

Field	Description
Select Process(es)	Select the name of the process(es) from the dropdown list.
Workstep Name	Select the name of the workstep from the dropdown list. The worksteps in the list vary depending on the chosen process.
Queue Type	Select a suitable type for the queue. It can be Introduction, Case Manager, Query, FIFO, Hold, Global Queue, System, WIP: Permanent, WIP: Dynamic, WIP: Search, and WIP: No Assignment.
Modified on	Specify the time span for filter criteria.

3. Click **Apply**.

Click **Reset to Default** to set the filter to default settings.

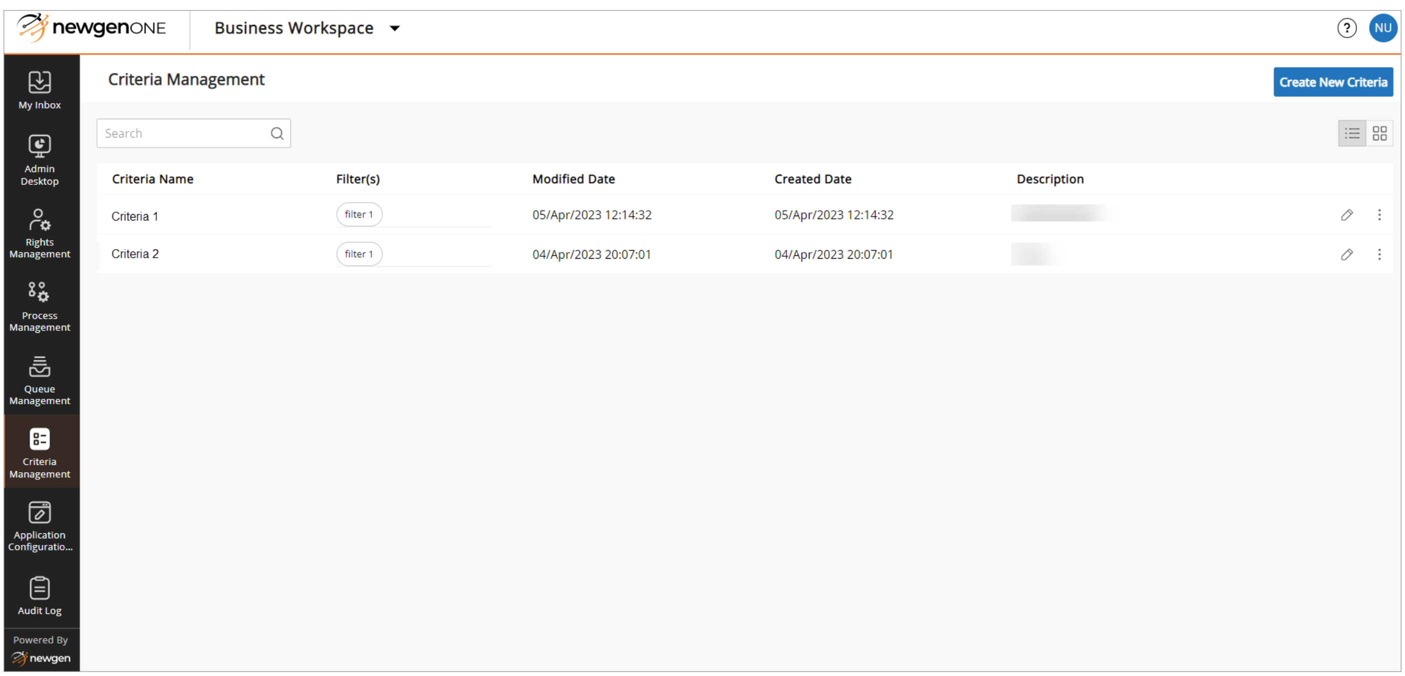
Criteria management

NewgenONE offers configurable dashboards that enable you to view customized information related to queues and workitems as per your preference in an easy-to-use visual representation. You can view information obtained from specific filters in chart or tile format. For this, you need to first define these filters and store them as criteria using NewgenONE Business Workspace, which can be used in views they are associated with.

You can configure these views using NewgenONE System Admin and see them in Business Workspace. Configurable dashboards give enhanced search functions and the ability to see filtered information in real time based on your requirements. Apart from this, you can also modify the visual appearance of the dashboard.

For more information, refer to *NewgenONE 2024.1 System Admin Administration Guide* and *NewgenONE 2024.1 Business Workspace User Guide*.

To manage queues, switch to the **Criteria Management** tab using the navigation pane. This page lists all the defined criteria in the cabinet along with their applied filter, modified date, creation date, and description.



Apart from this, use the search functionality to find a particular criterion in the list by its name. To change the view of the users, click the **List View** or **Compact View** toggle on the upper-right corner of the page. By default, Compact View is selected.

Creating criteria

To create criteria, perform the following steps:

1. Navigate to the **Criteria Management** tab. The Criteria Management page appears.
2. Click **Create New Criteria**. The Criteria Definition page appears.

Criteria Definition

3. Enter the name of the criteria. It accepts only alphanumeric values up to 40 characters.
4. Enter a description of the criteria.
5. Choose the process on which you want to apply the criteria.
6. Select the respective queue on which you want to apply the criteria.
7. Click **Next**. The Define Filter page appears.

Define Filter

8. Enter the name of the filter.
9. Specify the filter condition. It can be any of the following:
    - **Satisfy Following Conditions** — Implies all the conditions in the selected filter must be met.
    - **Satisfy All Conditions** — Implies all the conditions across all the filters must be met.
    - **Satisfy Any Conditions** — Implies any of the conditions in the selected filter must be met.
10. Enter the variable, operator, and value in the respective fields.
    To add more filters, click **Add Condition**.
11. Click **Next**. The Criteria Visualization page appears. The left pane displays all the defined criteria. While, the pane on the right, displays the properties you require for visualizing the criteria.

Criteria Visualization

12. Select the filters and the corresponding color you want to use for the output.
13. Select the view for criteria visualization. It can be set to **Graph View** or **Tiles View**.
    - On selecting **Graph View**, you have the option to set the **Chart Type** as Donut, Bar, and Pie.
        - For the **Donut** or **Pie** chart type, specify the following properties:

<table>
<tr><th>Property</th><th>Description</th></tr>
<tr><td>Semi chart</td><td>Turn on this toggle to display a semi-donut or semi-pie chart.</td></tr>
<tr><td>Show Legend</td><td>Turn on this toggle to display the legend with the chart. The following options appear:
Legends Position — Specify the legend position adjacent to the chart. It can be set to Top, Bottom, Left, or Right.
Legends Font Size — Specify the legend font size. It can be set to Small, Medium, and Large.</td></tr>
<tr><td>Select Output Mode</td><td>Allows you to customize or manually adjust the chart orientation and data representation. Select any of the following options:
System(Auto) — Select this option to automatically adjust the chart orientation and data representation, prioritizing the best user experience. Upon selection, the Legends Position, Legends Font Size, and Data Display Type in Charts options get disabled.
For pie and donut charts, the system consistently places legends on the right side, enhancing visual understanding and user navigation.
When you choose the Show Percentage option for the data display type in a pie or donut chart, the labels in the output are displayed slightly outside the chart.
Custom — Select this option to manually adjust the chart orientation and data representation.
In custom mode, be careful when you make manual changes, as they can distort the user interface in the output.</td></tr>
</table>

Property	Description
Data Display Type in Charts	Select any of the following options: • **None** — Select this option if you want to display no display type for data in the chart. • **Show Percentage** — Select this option to display data in percentage. • **Show Numbers & Percentage** — Select this option to display data in numbers and percentages. • **Show Numbers** — Select this option to display data in numbers only.
Enable Refresh (Optional)	Turn on this toggle to enable the **Refresh** option in the output. Use this option to refresh the data in the chart.

◦ For the **Bar** chart type, specify the following properties:

Property	Description
Show grid	Turn on this toggle to display grid lines on a bar chart, providing a visual reference for accurate data reading and interpretation
Show Legend	Turn on this toggle to display the legend with the chart. The following options appear: • **Legends Position** — Specify the legend position adjacent to the chart. It can be set to **Top**, **Bottom**, **Left**, or **Right**. • **Legends Font Size** — Specify the legend font size. It can be set to **Small**, **Medium**, and **Large**.

Property	Description
Select Output Mode	Allows you to customize or manually adjust the chart orientation and data representation. Select any of the following options: • **System(Auto)** — Select this option to automatically adjust the chart orientation and data representation, prioritizing the best user experience. Upon selection, the Legends Position, Legends Font Size, Label Orientation, Chart Orientation, and Show Numbers on Bar options get disabled. In the output, if a user opens the bar chart in a separate window, the legends will appear even if the Show Legend toggle is turned off while defining the properties of the bar chart. • **Custom** — Select this option to manually adjust the chart orientation and data representation. In custom mode, be careful when you make manual changes, as they can distort the user interface in the output.
Label Orientation	Set the orientation of the X-axis labels. It can be set to **0**, **45**, or **90** degrees.
Chart Orientation	Set the orientation of the chart. It can be set to **Horizontal** or **Vertical**.
Title	Specify the titles for the X and Y axes.
Show Numbers on Bar	Select any of the following options to set data representation on a bar chart: • **On Hover** — Select this option to display the data when hovering over the chart. • **Permanent** — Select this option to display the data permanently on the chart.
Enable Refresh	Turn on this toggle to enable the **Refresh** option in the output. Use this option to refresh the data in the chart.

- If you select **Tiles View**, then specify the following properties:

Property	Description
Browse Icon	Choose the icon for the tile.
Alignment	Specify the alignment of text in the tile. It can be set to **Left** or **Center**.
Tile Background Color	Specify the background color of the tile.
Tile Border Color	Specify the border color for the tile.
Tile Border Size	Specify the border size for the tile. It can be set to **Small**, **Medium**, or **Large**.
Filter Font Color	Specify the font color for the filter.
Filter Font Size	Specify the font size for the filter. It can be set to **Small**, **Medium**, or **Large**.
Count Font Color	Specify the font color of the count in the tile.
Count Font Size	Specify the font size of the count in the tile. It can be set to **Small**, **Medium**, or **Large**.
Aggregate Settings	Select the **Enable Aggregate** checkbox to show the total count of all the filter values in the tile. You can also add a text label to provide a description of the aggregated value in the tile.
Enable Refresh	Turn on this toggle to enable the **Refresh** option in the output. Use this option to refresh the data in the chart.

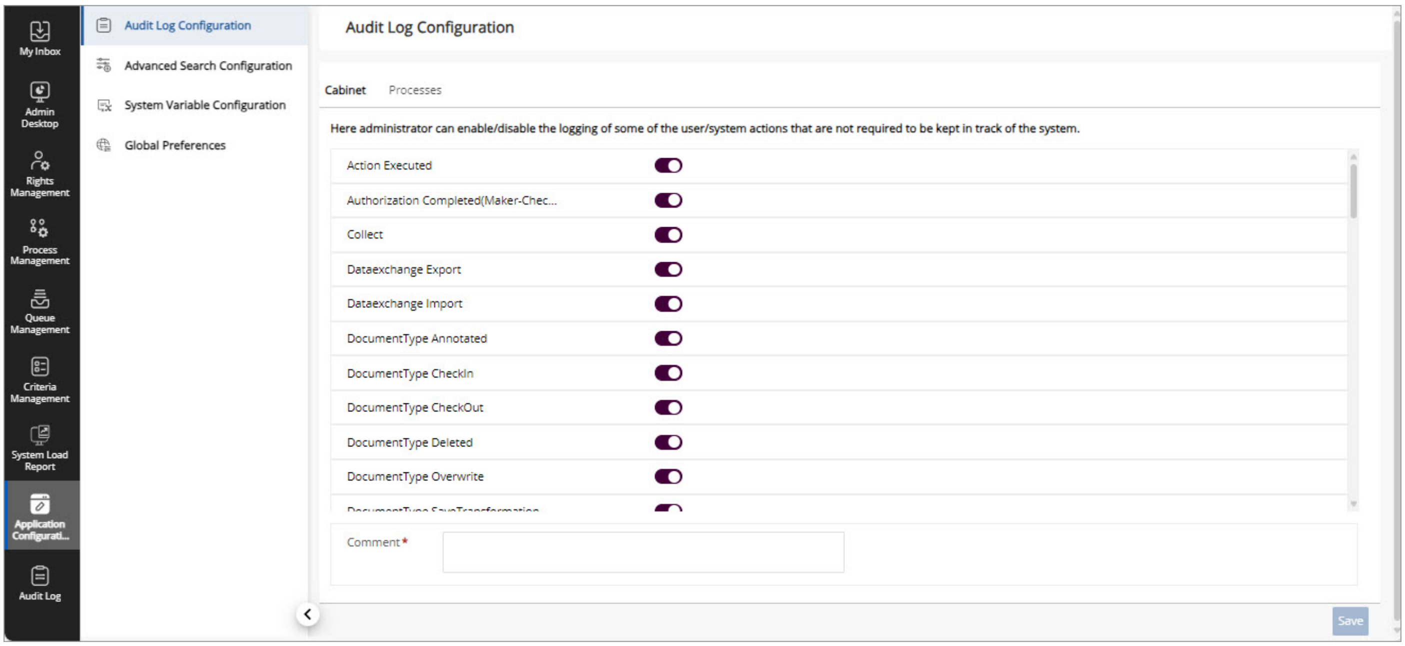
14. Click **Next**. The Output Definition page appears.

Output Definition

15. Select the variable you want to use to view the data.
16. Specify the display name for the variable.
17. Enable the sorting toggle to organize the data in a particular order.
18. Specify the variable based on which you want to apply the default sorting and define the sorting order, that is, ascending or descending.
19. Click **Save**. The criteria get created.

Application configurations

The **Application Configuration** tab allows you to configure the audit log, advanced search, system variable, and global preferences settings.



Related topic(s)

- Configuring audit log settings
- Configuring advanced search settings
- Configuring system variable settings
- Configuring global preferences settings

Configuring audit log settings

Audit Log Configuration allows you to enable or disable user or system actions per your requirement in the cabinet and processes.

To enable or disable the logging of specific user or system actions in the cabinet, perform the following steps:

1. Go to **Audit Log Configuration**. By default, the Cabinet page appears.
2. Use the toggle to enable or disable the required actions such as Action Executed, Authorization Completed(Maker-Checker), ChildWorkitem Deleted, Collect, Dataexchange Export, Dataexchange Import, Delete Log, Delete Reminder, Document Downloaded, DocumentType Added, DocumentType Annotated, DocumentType CheckIn, DocumentType CheckOut, DocumentType Deleted, DocumentType Overwrite, DocumentType SaveTransformation, DocumentType Undo CheckOut, DocumentType Undo CheckOut, Email, Escalation Action, Exception_Cleared, Exception_Modify, Exception_Raised, Exception_Undo, Fax, Mail Action Failed, Mail Action Successful, Mail Added To Queue, Print, Priority_Decremented, ProcessInstance Completed, ProcessInstance Deleted, ProcessInstance Discarded, ProcessInstance State Changed, Release, RollBack Diverted Workitem, SecondaryDBFlag was updated, Set AuditTrail, Set Auditor, Set Reminder, Spawned workitem, Spawning Workitem, Submit, Subscribe Action, ToDoItemStatus_Modified, Trigger, WorkItem Holded, WorkItem Referred, WorkItem Submitted, WorkItem Unassigned, WorkItem Unholded, WorkItem WithDrawn, Workitem AdHocRouted, Workitem Collected, Workitem Data Exported, Workitem Diverted, Workitem Opened, Workitem Reassigned, Workitem Reassigned, Workitem Rejected, Workitem delinked, Workitem linked, getlink, set User Preferences, and workitem Accepted.
3. Add comments in the **Comment** box.
4. Click **Save**. The cabinet settings get changed.

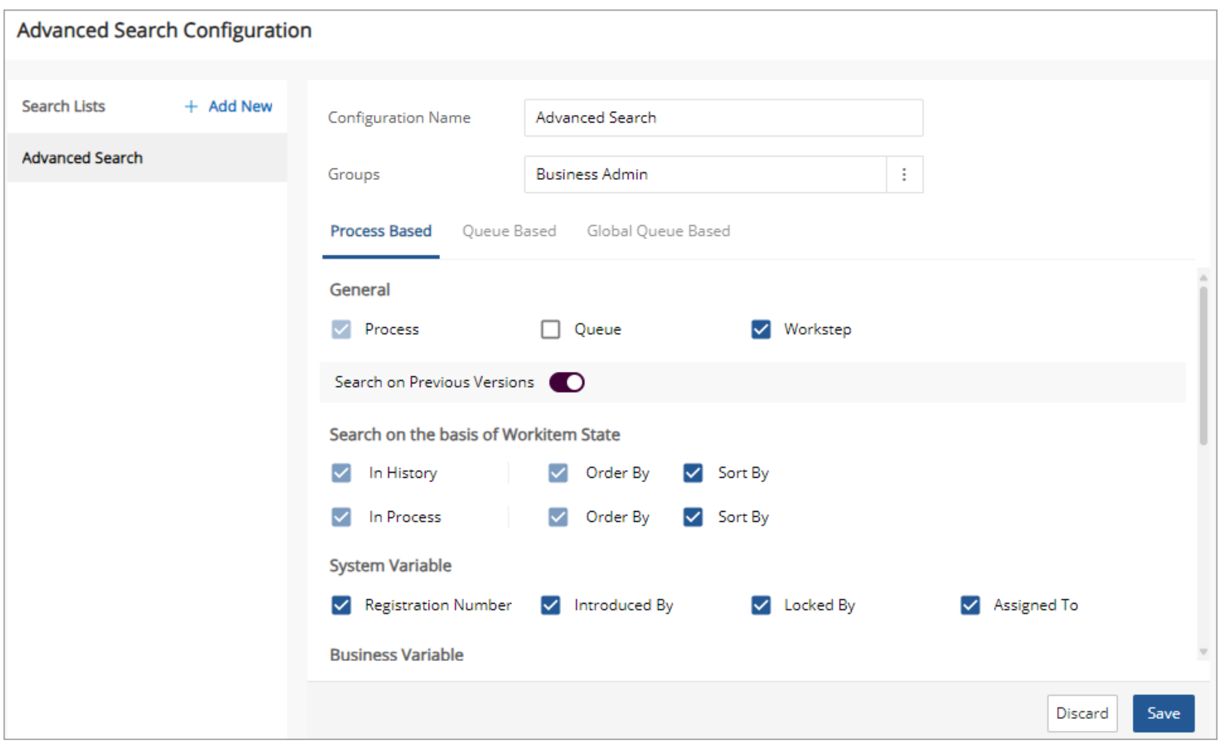
Configuring advanced search settings

To search a workitem using advanced search functionality, perform the following steps:

1. On the Application Configuration page, navigate to the **Advanced Search Configuration** tab.
2. Click **+Add New Configuration Name**. The Add Configuration dialog appears.
3. Enter the configuration name and associate the groups to it.

   You cannot associate the same groups in different search configurations.

4. Click **Continue** to proceed further. The Advanced Search Configuration page appears. Here, you can apply a search based on the process, queue, and global queue.
   - Process Based — For searching workitem based on process.
   - Queue Based — For searching workitem based on queue.
   - Global Queue Based — For searching workitem based on a global queue.



5. Select the **Process-Based**, **Queue Based**, or **Global Queue Based** tab as required and specify the following criteria.
   a. If you chose the **Process Based** tab, then enter the following details:

Field	Description
General	Select the required option you want to include in the search criteria from the following options: • Queue • Workstep The **Process** is selected by default and cannot be changed. You are allowed to search on previous versions by enabling the **Search on Previous Versions** toggle.
Search on the basis of Workitem State	Select the required option you want to search on the basis of workitem state from the following options: • In History (Selected by default) ◦ Order By (Selected by default) ◦ Sort By • In Process (Selected by default) ◦ Order By (Selected by default) ◦ Sort By
System Variable	Select the system variables you want to include in the search criteria. It can be any of the following: • Registration Number • Introduced By • Locked By • Assigned To
Business Variables	Business variables contain the basic, extended, and system variables of a process. The availability of fields depends on the business variable defined for the selected process. Specify the business variables fields that are related to the required workitem. Else, enable the **Provision to define conditions on business variables** toggle to add custom variables. To configure search variables, see Configuring search variables.
Date Variables	Select the date variables you want to include in the search criteria. It can be any of the following: • Introduced On • Exited On • Created On

Field	Description
Others	Select the workitem state you want to include in the search criteria. It can be any of the following: • Priority • Exception • Lock status • Hold Workitem • Suspended Workitem • Exclude Exit Workitems

b. If you chose the **Queue Based** tab, then enter the following details:

Queue based search allows only web advanced search and mobile advanced search.

Field	Description
General	**Queue** is selected by default.
System Variable	**Introduced By** is selected by default.
Business Variables	For details see Business Variables.

c. If you chose the **Global Queue Based** tab, then enter the following details:

Global queue based search allows only web advanced search and mobile advanced search.

Field	Description
General	**Global Queue** is selected by default.
System Variable	**Introduced By** is selected by default.
Business Variables	For details see Business Variables.

6. Click **Save**. The configuration gets saved.

Configuring search variables

Perform the following steps to configure the search variable that will be used in advanced search:

1. Enable the search variables for the following searches:
   - Web Advanced Search
   - Mobile Advanced Search
   - Web Quick Search
   - Mobile Quick Search
2. Click ⋮ icon. The list of processes appears.
3. Select the process, then click **OK**. For web quick search and mobile quick search go to step 6.
4. A list of search variables and search output appears for web and mobile advanced search.
5. Select the variables, or click **Select All** to configure all the variables for advanced search.

   Web advanced search and web quick search allows you to define a picklist on the added variables. Boolean and date data types are not available for the picklist.

6. Select a variable name from the drop-down.
7. Enter the Alias name in the text box to use in the quick search.
8. (Optional) Select **Search All Versions** to apply search on all versions of the process.
9. Click **Click to Add**. The selected variable appears in the below table to use in quick search.

Configuring system variable settings

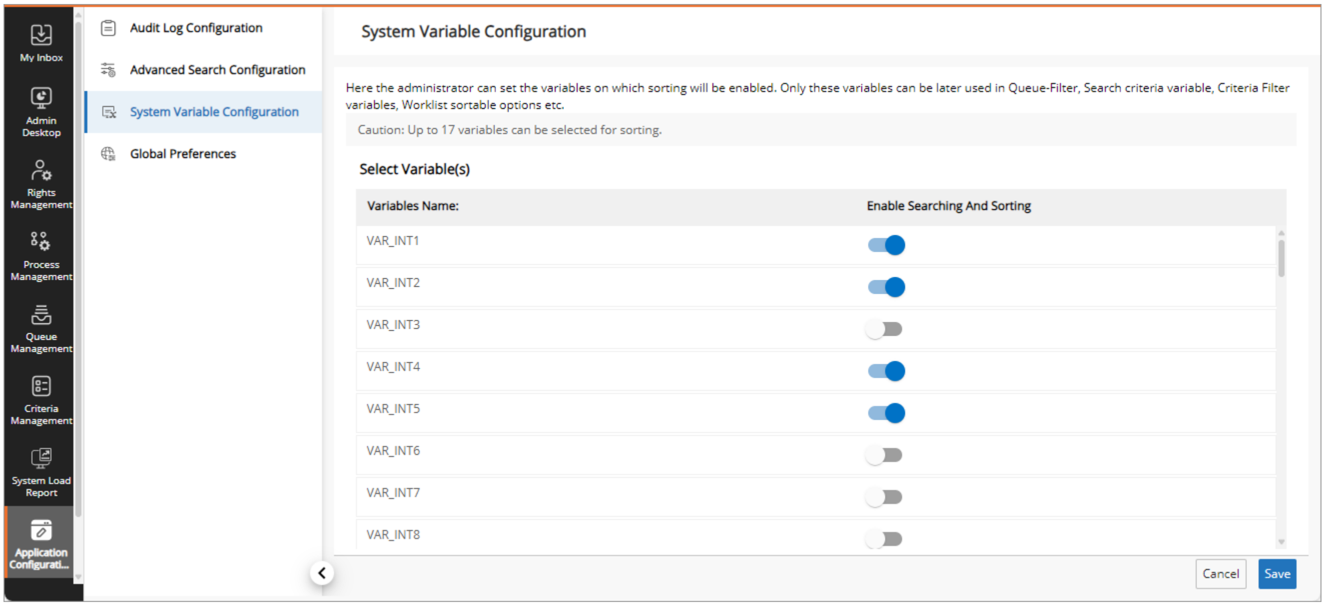
System Variable Configuration allows you to configure the system and queue variables on which searching and sorting are enabled. Only these variables can be used in queue-filter, search criteria variable, criteria filter variables, worklist sortable options, and others. By default, you are allowed to configure upto 17 variables for searching and sorting.

The following four variables are system defined on which sorting and searching is enabled by default:

- WorkitemName
- EntryDateTime
- ValidTillDateTime
- ActivityName

To set the system variable configuration, perform the following steps:

1. On the Application Configuration page, navigate to the **System Variable Configuration** tab. The Select Variable(s) page appears displaying all the system and queue variables.



2. Use the toggle to enable or disable the searching and sorting on the respective variables name.
3. Click **Save**. The variable setting gets changed.

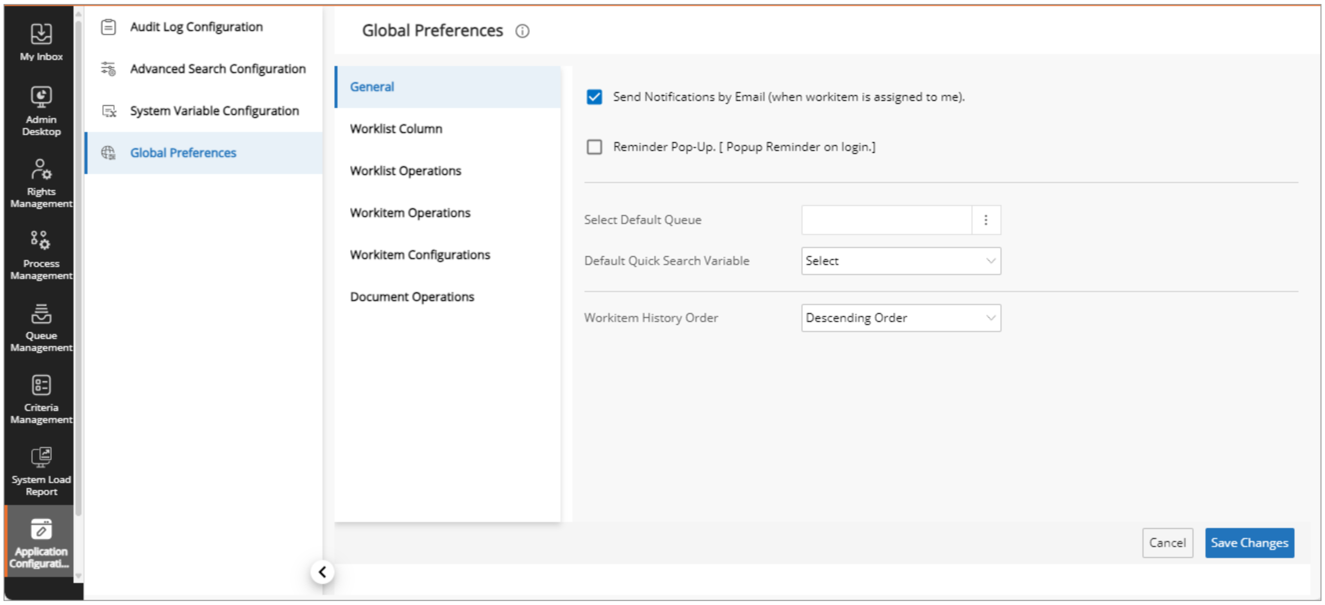
Configuring global preferences settings

Global Preferences allows you to set the sequencing of worklist columns and operations, for selecting the required options to display on workitem and worklist, and configuring document related operations, among other preferences.

To set the global preferences, perform the following steps:

> If any operation is disabled in the global preferences, the user cannot supersede those settings.

1. On the Application Configuration page, navigate to the **Global Preferences** tab. The Global Preferences page appears containing various tabs to set preferences.



2. In the General tab, specify the following fields:

Field	Description
Send Notifications by Email	Selecting this checkbox enables the system to send you an email notification when a workitem is assigned to you. With this setting enabled, you can directly open the workitem in WorkDesk using the link provided in the email notification and begin working on it.
Reminder Pop-Up	Selecting this option enables the reminder notification to pop-up whenever administrator signs into the workspace. Admin users can on or off their user preferences superseding global preferences.
Select Default Queue	Allows you to select the default queue.
Default Quick Search Variable	Allows you to select the default quick search variable.
Workitem History Order	Allows you to select the workitem history in ascending or descending order.

3. Click the **Worklist Column** tab. The list of worklist column header appears.
4. Enable or disable the toggle to show or hide the column header based on your requirements.
5. The ⠿ icon allows you to arrange the sequence of the worklist column header by drag and drop functionality.

6. Click the **Worklist Operations** tab. The list of worklist operations header appears.
7. Enable or disable the toggle to show or hide the column header based on your requirements.
8. The ⠿ icon allows you to arrange the sequence of the worklist column header by drag and drop functionality.
9. Click the **Workitem Operations** tab. The list of workitem operations header appears.
10. Enable or disable the toggle to show or hide the column header based on your requirements.
11. Click the **Workitem Configurations** tab. The following configuration list appears to submit the workitem:
    - Show the confirmation pop-up on submitting the workitem.
    - Show the option to bring the next workitem on confirmation pop-up.
12. Enable or disable the configurations based on your requirements.
13. Click the **Document Operations** tab and specify the following details:
    - Document SortOrder — Allows to sort the document in ascending or descending order from the dropdown list.
    - Document OrderBy — Allows to order the document in different categories from the dropdown.
    - Resize Option — Allows to resize the document in a different mode from the dropdown.
    - Resize Percentage — Allows to resize the document in percentage.

      This option is only enabled when the Resize Option is selected as the PercentageMode.

    - Select the following options to set on the document:
        - Allow delete document
        - Allow deletion of document by owner only
        - Show workitem original name in parenthesis
        - Zoom lens status
14. Click **Save Changes.** The Global Preferences get changed.

System load report

The System Load Report tab allows you to generate a report of the workitems based on the selected process in tabular and graphical view. It lets you view the report based on activity, queue, and user.

To generate a system load report, perform the following steps:

1. Navigate to the **System Load Report** tab.
2. Click the ellipsis icon ⋮ to view the list of processes.
3. Select a process to view the report of its workitems.
4. Click **OK**. The report appears in a tabular format, allowing you to view activity, queue, and user based reports.
5. Filter the report
6. To filter workitems by date, click the **dropdown** menu and select a predefined range like Today, Yesterday, Last 7 days, Last 30 days, or choose Custom to set a specific date range. The filtered workitems appear based on your selected date range.
7. Click the refresh icon to refresh the report.
8. Click the graphical icon to view the report in a graphical format.
9. Click the next and previous icons < > to navigate between the reports.

Audit logs

The audit log feature allows you to generate a log of actions performed on a process. It helps you to track the type, executor, and time of the action.

For example, a business administrator can generate an audit log to keep a track of all the modifications done in a particular process.

To generate an audit log, perform the following steps:

1. Navigate to the **Audit Log** tab.
2. Enter the following details in the corresponding fields:

Field	Description
Type	Indicates the type of item being audited. It can be a queue, process, cabinet, right management, or user. Depending on the chosen type, select the required queue, process, or user, respectively.
Operation	Indicates the type of operation performed on the item. It can be admin operations, workitem operations, and others. These operations depend on the chosen type.
From	Refers to the start date for which you want to generate the audit log.
End	Refers to the end date start date for which you want to generate the audit log.

3. Click **Generate**.

Terms and definitions

This section describes the different terms and their definitions used in process management.

Users

Manual operators and automatic programs utilize the users to connect and interact with the NewgenONE system. The following are the types of users:

- Non-supervisory users — Refers to the normal users of the system that do not belong to any supervisor group of users. Such users can access those features for which they have assigned rights and permissions.
- Supervisory users — Refers to the administrator users of the system belonging to the Supervisor group of users. Such users can access all the available features. They do not require any separate rights for a particular feature.

> A supervisor can give rights to users for managing queues and processes. He can give these rights through the Document Management System (DMS). He can also grant full access permissions to the documents present in the queue and process folders with their names.

Cabinet

A cabinet is a database where all the processes are stored. It contains information about the definition of the processes, and their corresponding workitems along with the data associated with them.

Cabinet Management

Cabinet Management means managing the NewgenONE database containing all the process definitions, user details, group details, workitem data, and others. Cabinet Management is a supervisory task performed by an administrator user of the system. It facilitates the creation and association of sites and volumes on one hand and the addition and deletion of users and groups on the other. It also facilitates the creation of roles in the system. Furthermore, you can assign queue management and process management rights to different users.

Process Variables

While designing a process, multiple queue variables and external workitem data variables can be defined. These variables configure the processing rules in the process and might be updated at various points in the process. After the import of the external data variables, they behave the same way as the queue variable.
However, the 26th queue variables can be displayed in the Workitem List, while external variables can only be viewed and updated while opening the workitem.

The queue variables configured to appear on the Workitem Lists page are referred to as the process variables.

This configuration includes specifying an alias name for the corresponding system-defined name of the queue.

While designing a process, multiple queue variables and external workitem data variables can be defined. These variables are used to configure processing rules in the process and might be updated at various points in the process. After the import of the external data variables, they behave the same way as the queue variable.
However, the 26 queue variables can be displayed in the Workitem List, while external variables can be viewed and updated only upon opening the workitem.

The queue variables configured to appear in the Workitem List page are referred to as the process variables. This configuration includes specifying an alias name for the corresponding system-defined name of the queue variable.

> Define the queue variables to map the queue variable and system-defined names like VAR_INT1, VAR_STR1, and others.

For each queue, you can define process variable mappings, that is, which of the system-defined variables must appear in the header in the workitem list for the selected queue and with what names (specified in the alias).

Dynamic constants

Dynamic constants are fixed value holders that can be defined in a process at the time of designing through the NewgenONE Process Designer. These can then be used in various rules and settings in the process. Default values can be assigned to these constants during their definition. These values can also be changed at run-time during the execution of the process.