NewgenONE

IT Admin

Administration Guide

Version: 2024.2

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Newgen Software, Registered Office, New Delhi
E-44/13
Okhla Phase - II
New Delhi 110020
India
Phone: +91 1146 533 200
info@newgensoft.com

Contents

Preface

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

Revision history

Revision date	Description
November 2024	Initial publication

About this guide

This guide explains the usage of the IT Admin workspace of the NewgenONE platform. This guide describes various aspects of server management, system debugging, and user management using NewgenONE IT Admin.

Intended audience

This guide is intended for IT administrators and other equivalent roles responsible for the management of servers and cabinets, debugging, and user management.

This guide assumes that you have a working knowledge of the following:

- The fundamentals and standard practices of your business area
- Database management operations
- Server setup procedure
- Basic knowledge of cabinets

Related documents

The following documents are related to NewgenONE IT Admin:

- NewgenONE Overview Guide
- NewgenONE Release Notes

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

Introduction

NewgenONE provides you with the IT Admin workspace to enable IT administrators to perform various IT administrative operations such as registering servers, registering cabinets, and more. It also allows you access to log files of a particular module. You can also create and manage users. These users can perform operations using a dedicated URL.

Getting started

This chapter explains how to access the IT Admin workspace and its interface.

Click to see the following topics:

- Accessing IT admin workspace
- Exploring IT admin workspace interface

Accessing IT Admin

You can sign in to the IT Admin workspace in two ways. Supervisors can access NewgenONE and then navigate to the IT Admin workspace. Users created from the IT Admin workspace with different IT administrative privileges can access the Setup Configurations workspace using a dedicated URL.

To access the IT Admin workspace, perform the following steps:

1. Open the NewgenONE sign-in page using the following URL 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.

2. (Optional) To change the locale of IT Admin, click the locale dropdown and select the required option from the list. You can set the locale to English or Arabic based on your business requirements. By default, the locale is set to English.
3. Enter the following details:

Field	Description
Username	Enter the name of the IT Admin 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.
5. If a session with the same user is active on another machine, the system displays a message to reconfirm the current sign-in process. Click **Yes, Login** to continue.
6. Select the **IT Admin** workspace from the dropdown list available in the upper-left pane. The IT Admin workspace appears.

To access the Setup Configurations page for registering and managing cabinets, perform the following steps:

1. Open the Setup Configurations sign-in page using the following URL format:
   https://<IP address>:<Port>/workspacestudio/setup
   Where, *<IP address>* specifies the internet protocol (IP) address of the machine where the server is running, and <Port> specifies the port number of the server machine.
   For example: *https://127.0.0.1:6060/workspacestudio/setup*

2. Enter the credentials.

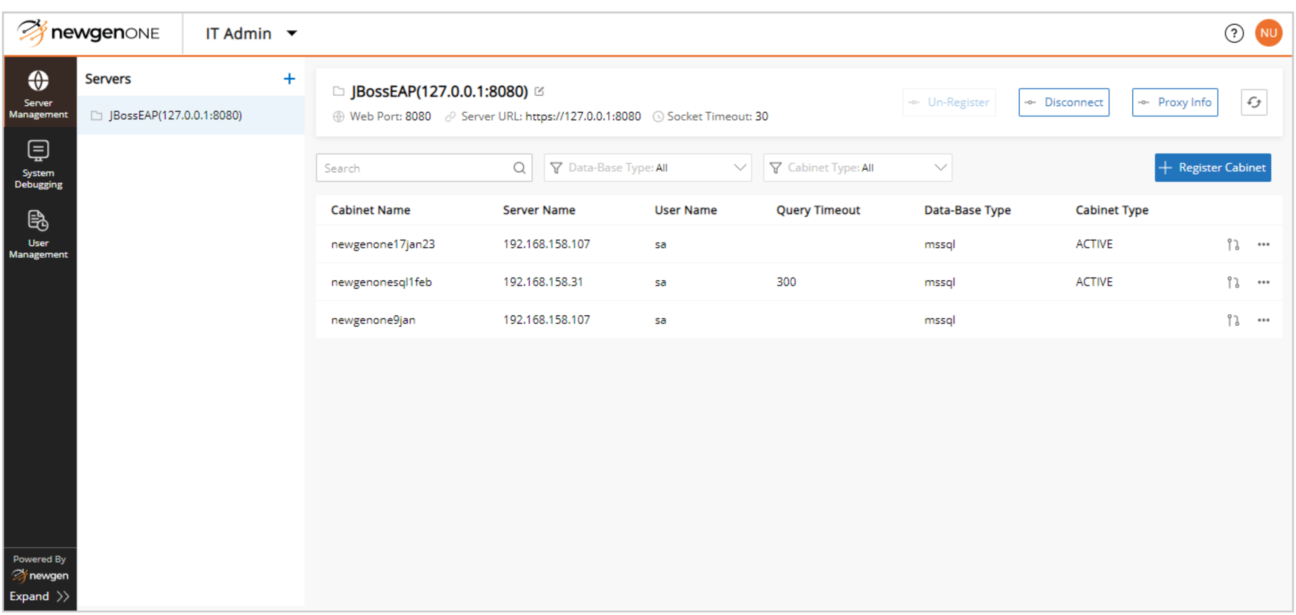
> The default credentials for signing into the Setup Configurations page are as follows:
> - Username: *ngoneadmin*
> - Password: *System123#*

3. Click **Login** to start the session. The Setup Configurations page appears as per the assigned privileges.

Exploring IT Admin user interface

The IT Admin workspace consists of the following menu items:

Tab	Description
Server Management	This is the landing page of the IT Admin workspace. This page provides you with all the necessary tools to register and manage servers and cabinets.
System Debugging	Allows you to access logs of all the modules of all the cabinets associated with the registered server.
User Management	Allows you to add IT administration users and manage their privileges.

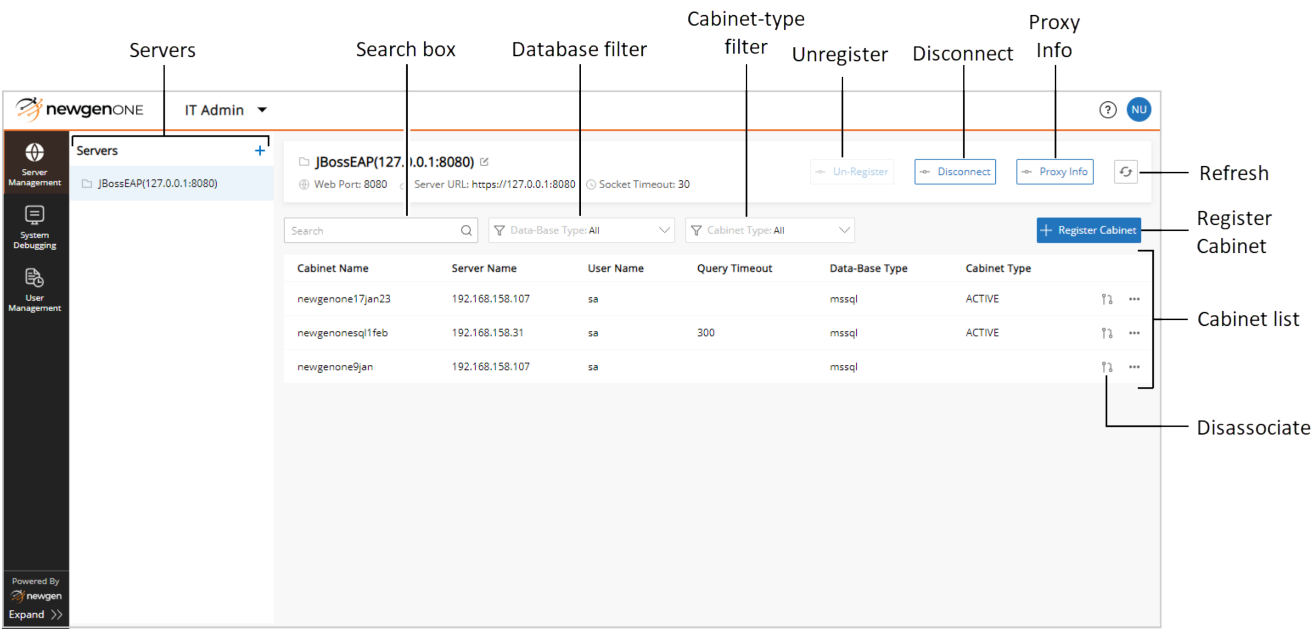


Furthermore, you can navigate through the elements of the IT admin user interface using the Tab key.

Managing servers

The Server Management page allows you to register, modify, connect, and disconnect servers. It further allows you to create, associate, test, and upgrade cabinets. You can set proxy information as well.

The Server Management page contains the following options:



Options	Description
Servers	This section displays the list of registered servers. It also provides you with the option to register a new server.

Options	Description
Server details	This area displays the following options: • **Search box** — Allows you to search a cabinet by name. • **Database filter** — Allows you to filter the cabinets by their database type. • **Cabinet-type filter** — Allows you to filter the cabinets by their type. • **Register Cabinet** — Allows you to register a cabinet and associate with the server. • **Cabinet list** — displays the list of cabinets in the selected server. • **Disassociate** — Allows you to disassociate a cabinet from a server. • **More options** — Allows you to test the connection, upgrade the cabinet, upgrade the OD version for the cabinet, and set the cabinet type.
Unregister	This option allows you to unregister a cabinet from the server.
Disconnect	This option is available for connected servers. It allows you to disconnect a server. Any modification to the server is not possible in the disconnected state. You can disconnect a server to avoid accidental modification to the server and its cabinets.
Connect	This option is available for disconnected servers. It allows you to connect to a server. Once connected, you can perform modifications to the server and its cabinets.
Proxy Info	Allows you to set the proxy information. This is required if the service interacts over a network with proxy.
Refresh	Allows you to update the server details.

Perform the below steps to access the server management:

1. Sign in to the IT Admin workspace.
2. Select **Server Management** from the navigation pane. The Servers page appears.

The Server Management menu provides you with options for:

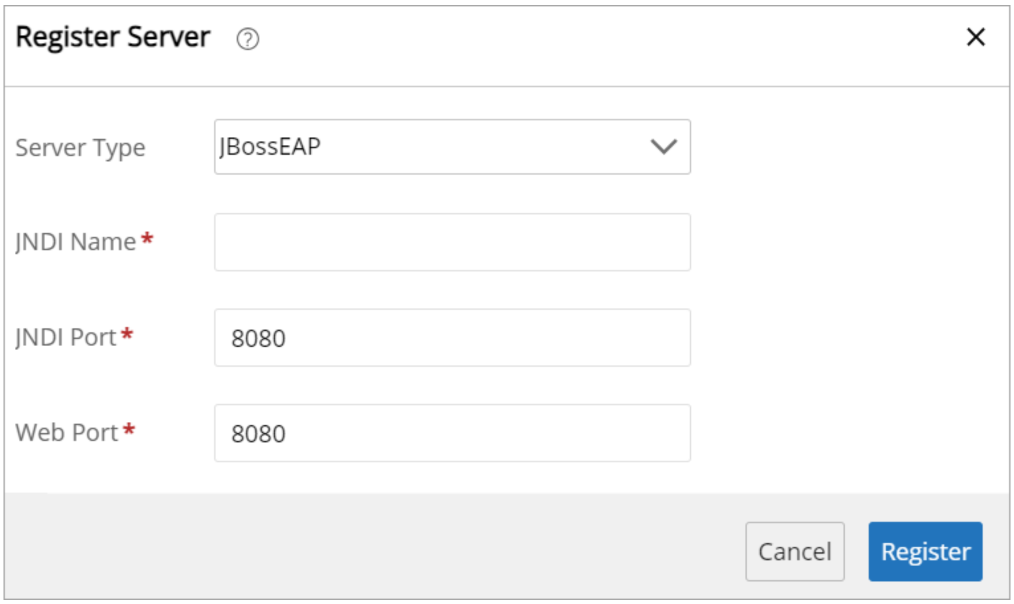
- Registering a server
- Unregistering a server
- Connecting to a new server
- Disconnecting from a server

Registering a server

This section explains the process of registering a new server.

To register a server, perform the following steps:

1. Navigate to the **Server Management** tab.
2. Click the add icon + given in the upper-left pane. The Register Server dialog appears.



3. Enter the following information in the corresponding fields:

> Upon selection of Server Type, the JNDI Port and Web Port field gets populated automatically with the default port number.

Field	Description
Application Server	Select the type of application server. It can be JBoss Enterprise Application Platform (EAP), Oracle WebLogic, IBM WebSphere, and Java Transaction Server (JTS).
JNDI Name	Enter the Java Naming and Directory Interface (JNDI) name for the application server.
JNDI Port	Enter the JNDI port number on which the application server listens to JNDI requests.
Web Port	Enter the port number on which the application server listens to HTTP/HTTPS requests.

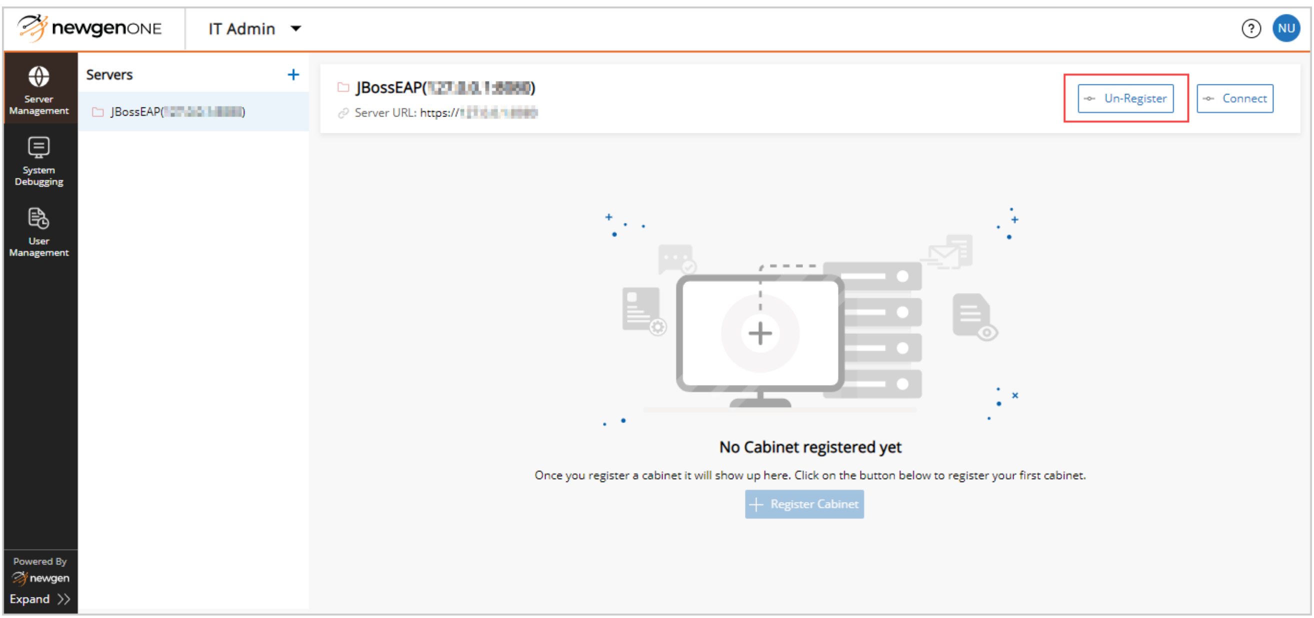
4. Click **Register**.
   The new application server gets registered.

Unregistering a server

This section explains the process of unregistering a server.

To unregister a server, perform the following steps:

1. Navigate to the **Server Management** tab.
2. Select the server that you want to unregister.
3. Click **Un-Register** given in the upper-right pane. The server gets unregistered.



The Un-Register option becomes active when you disconnect the server.

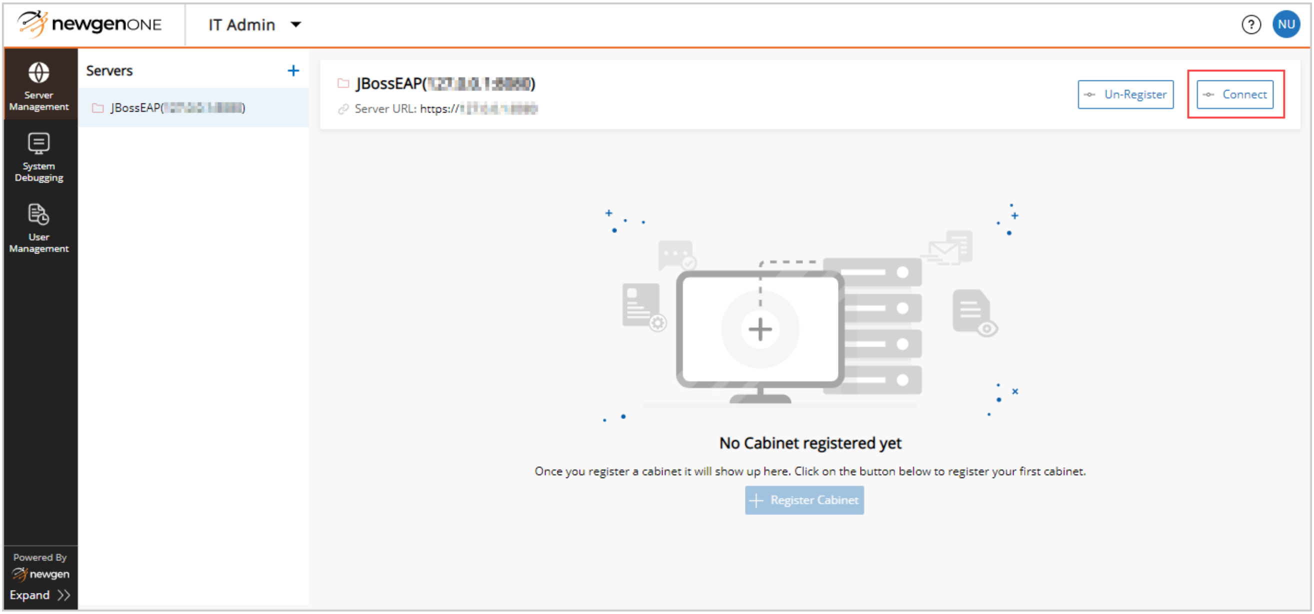
Connecting to a server

This section explains the process of connecting to a server.

To connect to a registered server, perform the following steps:

1. Navigate to the **Server Management** tab.
2. Select the server that you want to connect.

3. Click **Connect**. The server gets connected.



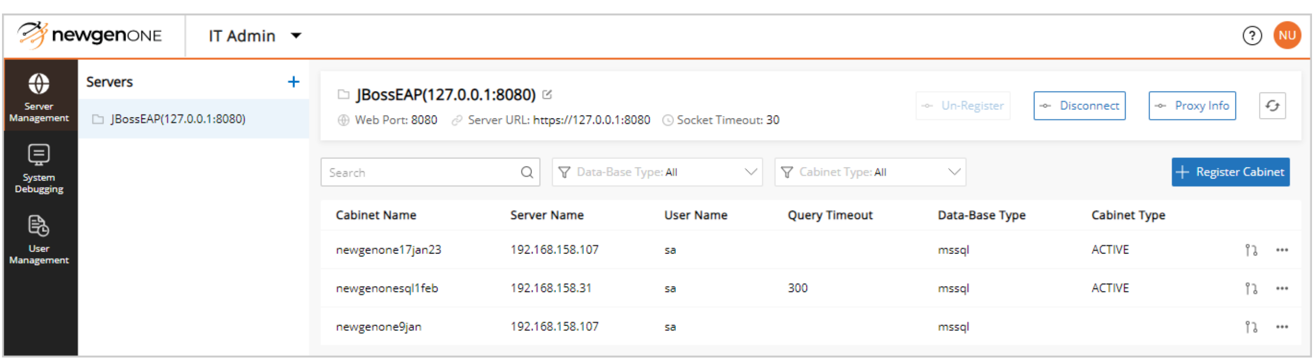
The Connect option is available for disconnected servers.

Disconnecting a server

Disconnecting a server makes it non-editable. This feature is useful for preventing any unintentional modification to the server and the associated cabinets.

To disconnect a server, perform the following steps:

1. Navigate to the **Server Management** tab.
2. Select the server that you want to disconnect.
3. Click **Disconnect**. The server gets disconnected.



Managing server and cabinets

IT Admin provides you with several options for server and cabinet management such as modifying servers, creating, associating, disassociating, testing, and upgrading cabinets.

This section describes the following actions:

- Modifying a server
- Creating and registering a cabinet
- Associating a cabinet
- Dissociating a cabinet
- Testing a cabinet
- Upgrading a cabinet
- Upgrading OD version
- Migrating data
- Generating migration summary report

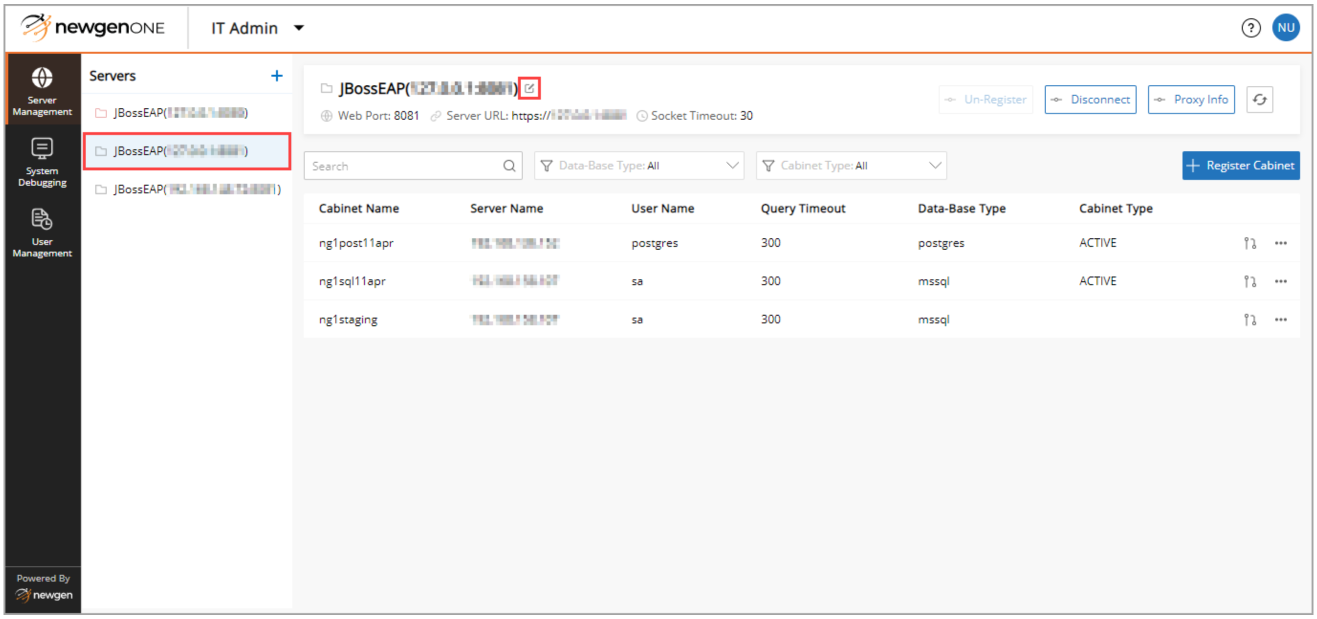
Modifying a server

The edit icon next to a server name allows you to edit the following server information:

- Socket Timeout
- Batch Size
- Log
- Routing

To modify a server, perform the following steps:

1. Navigate to the **Server Management** tab.



2. Select the server that you want to modify.
3. Click the edit icon given against the server name in the upper-left pane. The Modify Server dialog appears.
4. Enter the socket timeout. The socket timeout refers to the time after which the socket connection gets closed.
5. Specify the batch size. Batch size is the maximum number of items the server can fetch at a time and keep in its queue or list.
6. Select to generate logs for the following actions.:
   - **Transaction** — Select this checkbox to generate transaction-related logs.
   - **Connection** — Select this checkbox to generate all the connection-related logs.
7. Select the **Synchronous Mode** checkbox to enable synchronous routing of workitems.
8. Click **Modify**. The server gets modified successfully.

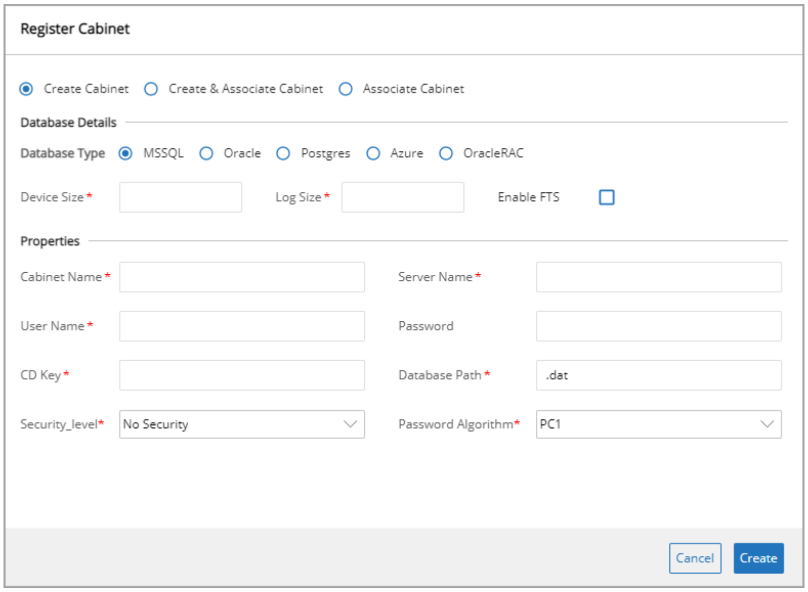
Creating and registering a cabinet

You can register a cabinet in a registered server.

To register a cabinet, perform the following steps:

1. Navigate to the **Server Management** tab.
2. Select the server to register a cabinet.

3. Click **+Register Cabinet**. The Register Cabinet dialog appears.
4. Select **Create Cabinet** to register a new cabinet.
   (Optional) You can also select **Create & Associate Cabinet** if you want to associate the cabinet after creation. Selecting Create & Associate Cabinet displays the Associate section with fields necessary to associate the cabinet.



5. Select any of the following database types:

- MSSQL
- Postgres
- OracleRAC
- Oracle
- Azure

6. Specify the following fields:

Field	Description
Device Size	Enter the initial size of the database in MB.
Log Size	Enter the initial log size.
Port	Enter the port number of the selected database server. This field is applicable for Oracle and Postgres databases only.
Service Name	Enter the service name for the Oracle database server only.
Enable FTS	Select to enable full-text search.
Cabinet Name	Provide a name for the cabinet.
Server Name	Enter the name of the machine where the server is running.

Field	Description
User Name	Enter the username to access the cabinet. The user must have sufficient privileges and rights to create a database or a Tablespace.
Password	Enter the password for the mentioned username.
CD Key	Specify the CD Key for cabinet registration. This CD key is available with the NewgenONE software package and is database specific.
Database Path	Enter the path to store the database information.
Security_level	Select one of the following options from this dropdown list: • No Security • Cabinet Level • Object Level
Password Algorithm	Select one of the following options from this dropdown list: • PC1 • SHA-1 • SHA-256 • SHA-512 • MD5 • AES

The input fields in the database and properties section can vary as per database type selection.

7. Click **Create**. On successful association, a confirmation message appears.

Associating a cabinet

This section explains the process of associating a cabinet with a registered server.

To associate a cabinet, perform the following steps:

1. Navigate to the **Server Management** tab.
2. Select a server to associate it with a cabinet.

3. Click **+Register Cabinet**. The Register Cabinet dialog appears.
4. Select **Associate Cabinet**.
5. Select any of the following database types:

- MSSQL
- Postgres
- Oracle Real Application Clusters (RAC)
- Oracle
- Azure

6. Specify the following fields:

Field	Description
Port	Enter the port number of the selected database server. This field is available for Oracle, Postgres, and Azure database types.
Service Name	Enter the service name. This field is available only for Oracle database type.
Cabinet Name	Provide a name for the cabinet.
Server Name	Enter the name of the machine where the server is running.
Tnsnames	It refers to the Transparent Network Substrate (TNS) names used for establishing connections to database instances by Oracle Net Services. This field is available only for Oracle RAC database type.
User Name	Enter the username to access the cabinet. The user must have sufficient privileges and rights to create a database or a Tablespace.
Password	Enter the password for the mentioned username.
Query Timeout	It defines the time within which the query must be executed.
Refresh Interval	Enter the time span at which the cabinet gets refreshed.
Min. Connection	Enter the minimum connection time for the session.
Max. Connection	Enter the maximum connection time for the session.

> The input fields in the Database Details and Properties sections can vary as per the database type selection.

7. Click **Associate**. On successful association, a confirmation message appears.

Dissociating a cabinet

To disassociate a cabinet from a registered server, perform the following steps:

1. Navigate to the **Server Management** tab.
2. Select a server to disassociate it from a cabinet.
3. Click the disassociate icon adjacent to the required cabinet. The Disassociate Cabinet dialog appears.
4. Click **Continue anyway** to disassociate the cabinet.

Testing a cabinet

To test a cabinet connection, perform the following steps:

1. Navigate to the **Server Management** tab.
2. Select a server to test an associated cabinet.
3. Click the More Options icon ••• adjacent to the required cabinet and then select **Test**. On a successful test, a confirmation message appears.

Upgrading a cabinet

Prerequisites

- Before taking the cabinet backup, stop all the services and unregister them from the NewgenONE System Admin module.
- Ensure the collation of the source and target database server or cabinet is the same.
- Upgrade OmniDocs to a version that is compatible with NewgenONE 2024.2.

To upgrade a cabinet, perform the following steps:

1. Navigate to the **Server Management** tab.
2. Select a server to upgrade an associated cabinet.
3. Click the **More Options** icon ••• adjacent to the required cabinet and select **Upgrade**. The Cabinet Upgrade Confirmation dialog appears.
4. Click **Continue anyway**. On a successful upgrade, a confirmation message appears.
   In case the upgrade process fails, an Upgrade Summary dialog appears. It displays a list of succeeded and failed items during the process. These items include the new tables added to the database, new columns added to the existing tables, and columns deleted from the existing tables.
   Click **Retry** to upgrade the cabinet again or click **Cancel** to proceed further.

To verify the successful upgrade of the cabinet, perform the following steps:

1. To check for an upgraded version of NewgenONE 2024.2, execute the following query in the DB client administration tool for the upgraded cabinet:

   ```
   SELECT * FROM PDBPMS_TABLE
   ```

2. Then, ensure the following entry in PDBPMS_TABLE for NewgenONE 2024.2:

   ```
   Product_Name = 'NewgenONE' and Product_Version = '2024.2'
   ```

Generating upgrade summary report

Upgrade summary report plays a crucial role in delivering key insights about the success and failure of the cabinet upgrade process. It also provides details about the different changes and updates made to the database due to cabinet upgrade. These changes include the list of new tables added to the database, new columns added to the existing tables, and deletion of columns from existing tables.

To generate a upgrade summary report, perform the following steps:

1. Navigate to the **Server Management** tab.
2. From the left pane, select the required server. The area on the right displays the corresponding cabinets.

3. Click the ellipsis icon ••• next to the required cabinet and select **Upgrade Summary** from the list.
   The Upgrade Summary dialog appears. It displays a list of succeeded and failed actions on including the addition of new tables to the database, addition of new columns to the existing tables, and deletion of columns from existing tables.
4. Click **Retry** to upgrade the cabinet again or click **Cancel** to proceed further.

Upgrading OD version

To upgrade the OmniDocs version for a cabinet, refer to the *OmniDocs Service Administration* section of the *NewgenONE OmniDocs 12.0 Service Administration Guide*.

Migrating data

NewgenONE offers the capability to migrate data from an iBPS cabinet to NewgenONE. After successfully associating the iBPS cabinet with the registered application server and upgrading the cabinet, you can migrate data to NewgenONE.

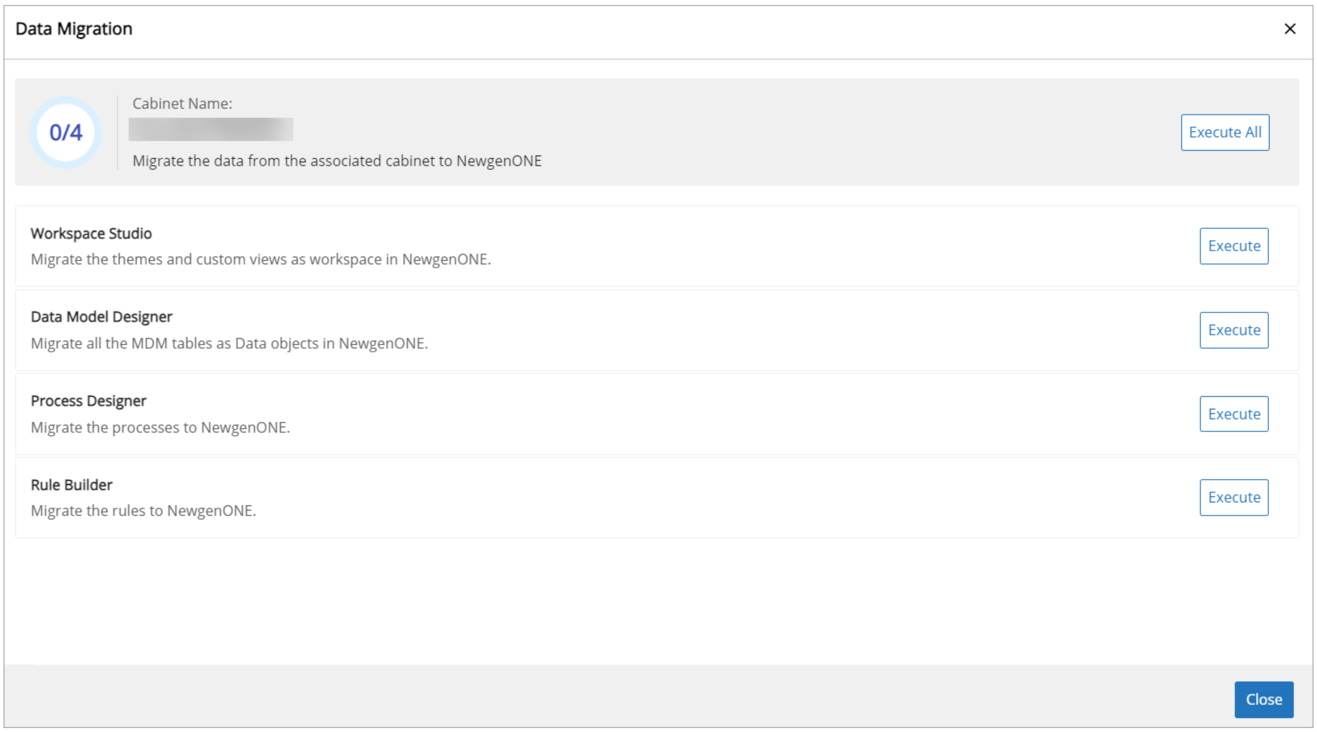
For more information, refer to the *NewgenONE Migration Guide*.

To migrate data to NewgenONE, perform the following steps:

1. Click **Data Migration**.
   The Authentication for Migration dialog appears.
2. Enter the username and the corresponding password.
3. Select the required cabinet from the dropdown list.
4. Select the **Confirm if the cabinet upgradation is completed before proceeding** checkbox in case cabinet is upgraded.
5. Click **Continue to Migration** to continue further.
   The Data Migration dialog appears. Here, you can specify the data you want to migrate to NewgenONE:
   - Click **Execute** next to Workspace Studio to migrate the iBPS themes and custom views as workspace in NewgenONE.

- Click **Execute** next to Data Model Designer to migrate all the Master Data Management (MDM) tables as data objects in NewgenONE.
- Click **Execute** next to Process Designer to migrate the processes to NewgenONE.
- Click **Execute** next to Rule Builder to migrate all the rules to NewgenONE.

Click **Execute All** to migrate all the above data to NewgenONE.



It takes a few seconds to migrate the data. To stop the migration process, click **Stop Execution**.

After successful migration, it shows the success and warning count of the themes, MDM tables, processes, and rules. Also, the migration status turns to Completed. Additionally, you can click **Execute Again** to migrate the specific data again.

6. (Optional) Click the info icon ⓘ next to the Warnings for more information about the error details. An error dialog appears displaying a list of errors with the total error count on top.
7. Click **OK** to close the dialog.
8. (Optional) To refresh the information in the dialog, click the refresh icon.
9. Click **Close** to close the dialog.

   Now, you can further register the cabinet using Automation Studio.

   For more information, refer to the Managing cabinets chapter of the *NewgenONE Automation Studio User Guide*.

Setting proxy information

Some services need proxy information to operate. You can set this information using the Proxy Info option.

To set proxy information, perform the following steps:

1. Navigate to the **Server Management** tab.
2. Select a server to set the proxy.
3. Click **Proxy Info**. The Set Proxy Info dialog appears.
4. Specify the following fields in the Set Proxy Info dialog:

Field	Description
WFS	It is a read-only field. The IP address of the WorkFlow Server appears here.
Proxy Enabled	Select this checkbox to enable the proxy. Selecting this checkbox activates the proxy details fields.
Debug Mode	Select this checkbox if you want to run the service in debug mode. In the debug mode the system logs the proxy activity.
Proxy Host	Enter the IP address of the proxy server.
Proxy Port	Enter the port address of the proxy server.
User Name	Specify the username to access the proxy server.
Password	Specify the password to access the proxy server with the mentioned username.
No Proxy For	It indicates the hosts that must be accessed without going through the proxy. Typically, this defines internal hosts. The value of this property is a list of hosts, separated by the pipe symbol '|'. In addition, you can use the asterisk symbol '*' for pattern matching. For example: "*.foo.com|localhost" indicates that every host in the foo.com domain and the localhost must be accessed directly even if a proxy server is specified.

5. Click **Save**. The proxy information gets saved.

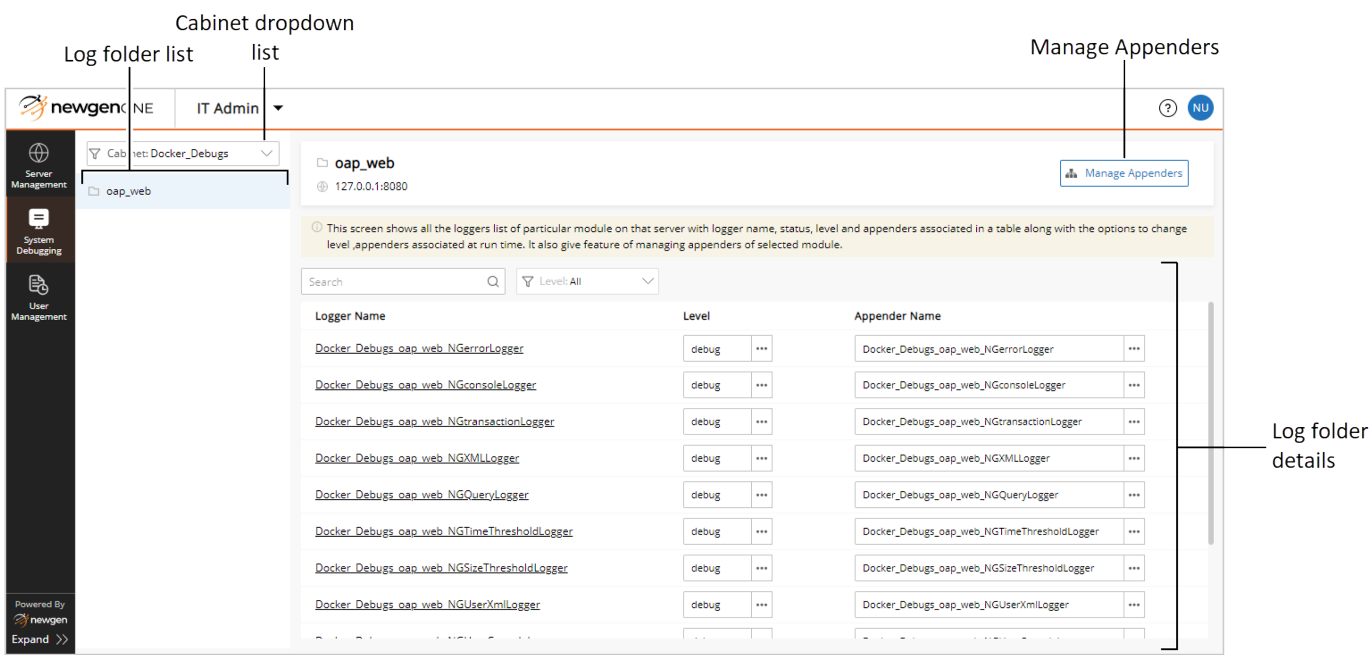
Refreshing service information

The Refresh option allows you to get the latest information about the number of processed work items through the service. To refresh, go to the **Server Management** tab and then click the refresh icon that appears in the upper-right corner.

System debugging

System debugging allows you to fetch the log files of all the modules of NewgenONE. Through system debugging, you can view a particular module and access its corresponding log files.

The System Debugging page contains the following options:



Options	Description
Cabinet dropdown list	This dropdown list consists of all the cabinets associated to the registered server.
Log folder list	This area displays the log folders available in the selected cabinet.

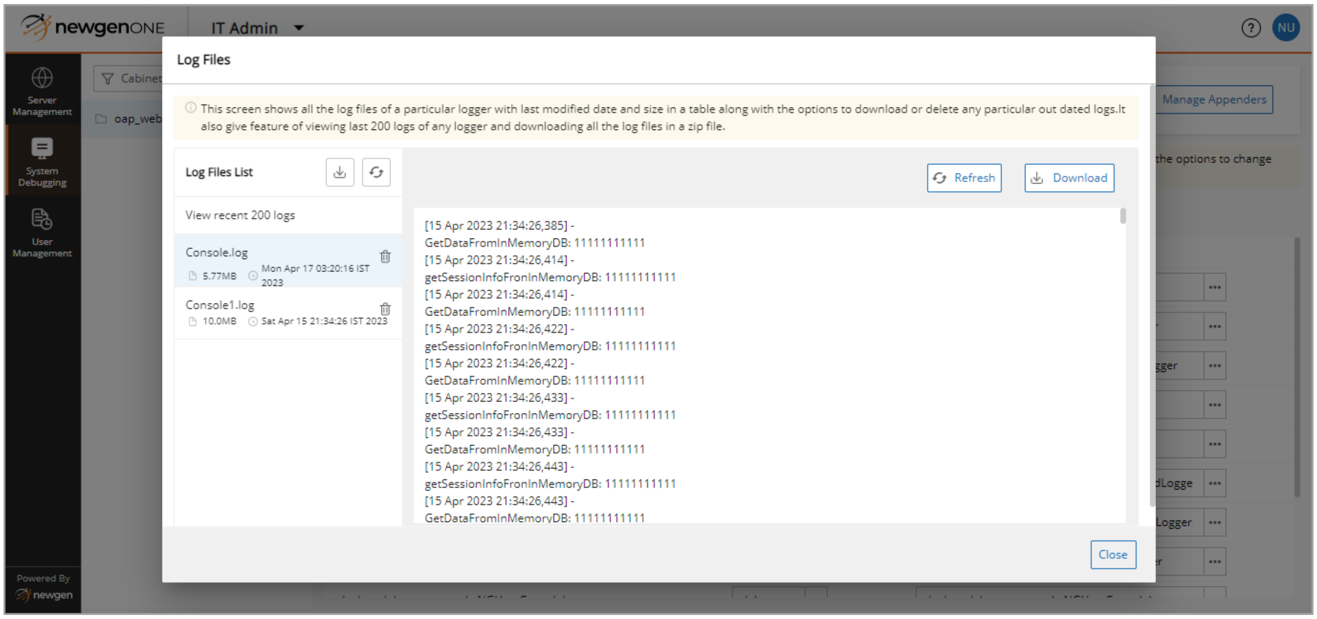
Options	Description
Log folder details	This area displays the following options: • **Search box** — Allows you to search a logger by name. • **Level filter** — Allows you to filter the loggers by the level assigned to them. • **Logger Name** — Displays all the loggers available in the selected log folder. Clicking a logger name displays the log files and provides the option to refresh and download the log files. • **Level** — Allows you to set the level of the logger. For example, you can set the level to Debug to generate logs for debugging purposes. You can also select Off to stop the logger function. • **Appender Name** — Appenders save the logs to a specific log file associated with it.
Manage Appenders	This option allows you to set the maximum size of a log file and the maximum number of log files for the logger to which the appender is assigned.

Accessing logs

From System Debugging you can access the logs for each module associated with a cabinet.

To access the logs of a specific module, perform the following steps:

1. From the navigation pane on the left, select **System Debugging**. The System Debugging page appears.
2. Select the required cabinet from the cabinet dropdown list. The list of log folders appears.
3. Select the required log folder. The loggers appear on the right.
4. Click the required logger. The Log Files dialog appears.
5. Click the required log file from the Log Files List section. The logs appear on the right.



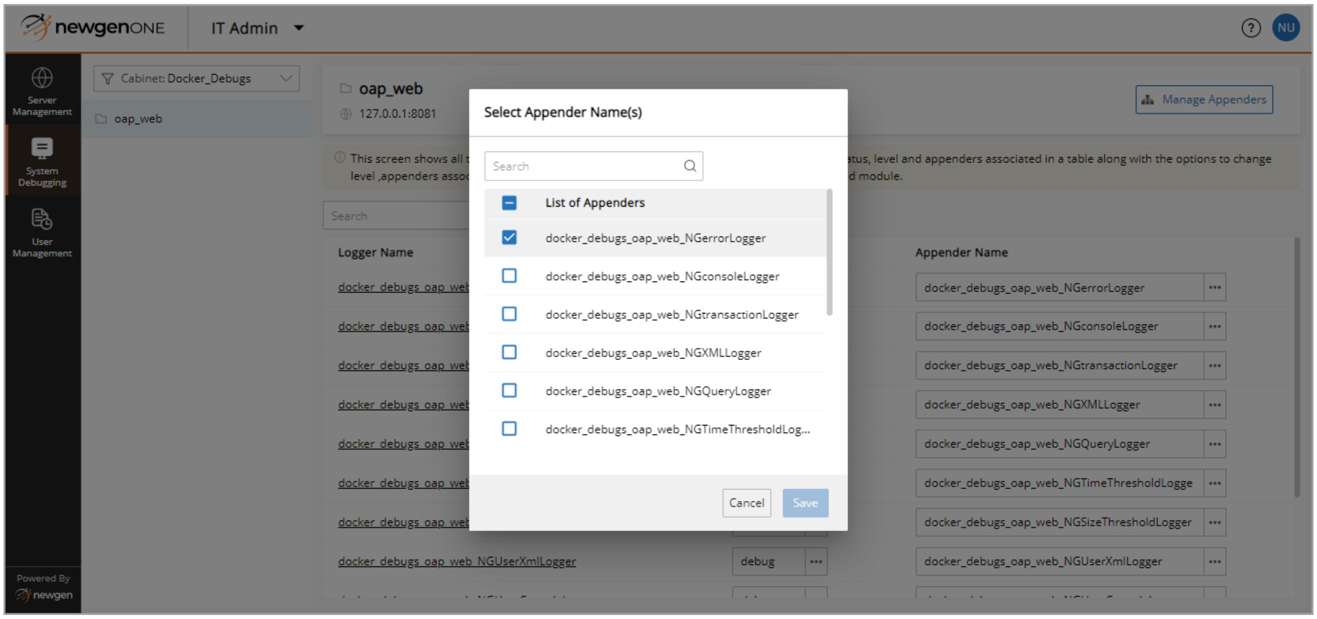
6. (Optional) Click the download icon to download all the available log files. Alternatively, click the Download button to download the selected log file.
7. (Optional)Click the refresh icon to refresh all the available logs to the most recent activity.
   Alternatively, click the Refresh button to refresh the selected log file.
8. (Optional) Click the delete icon next to a log file to delete the log file.

Managing appenders

An appender is associated with each logger to save logs to a specific file. NewgenONE IT Admin allows you to select the required appender for each logger.

To associate an appender with a logger, perform the following steps:

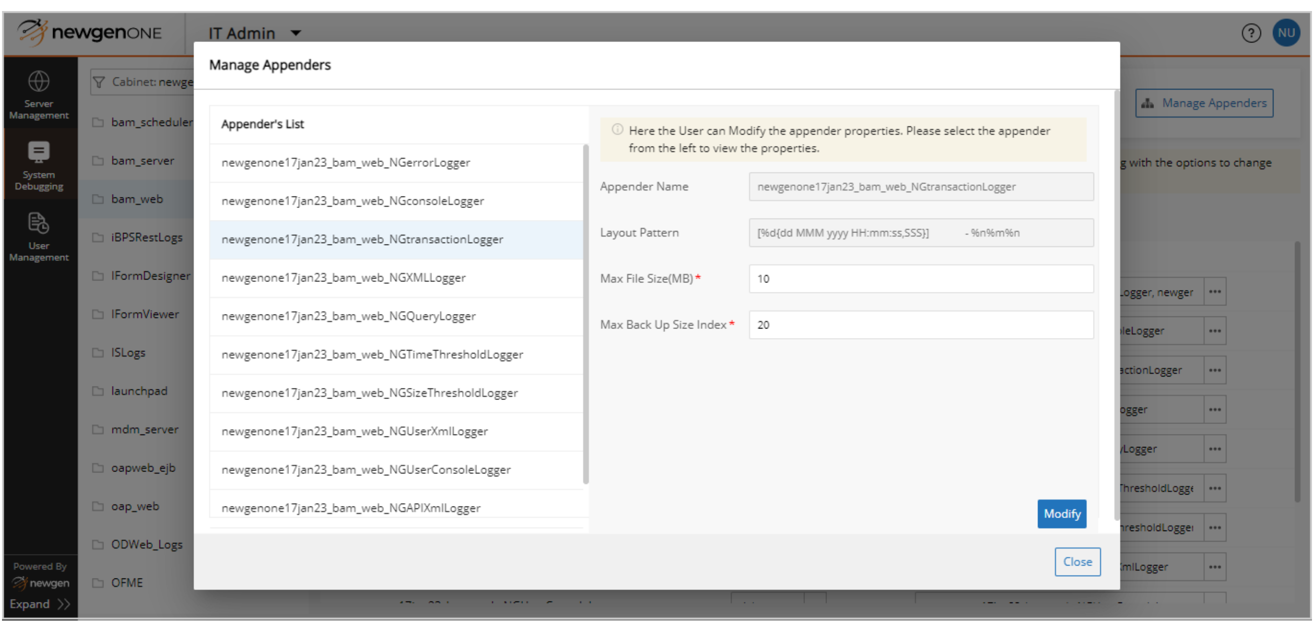
1. From the navigation pane on the left, select **System Debugging**. The System Debugging page appears.
2. From the cabinet dropdown, select the log folder.
3. Click the ellipsis icon ••• next to the appender name of the required logger. The Select Appender Name(s) dialog appears.



4. Select the required appenders and then click **Save**.

To modify the properties of an appender, perform the following steps:

1. From the navigation pane on the left, select **System Debugging**. The System Debugging page appears.
2. From the cabinet dropdown, select the log folder.
3. Click **Manage Appenders**. The Manage Appenders dialog appears.
4. Select the required appender from the Appender's list.
5. Enter the maximum size for the log files in the Max File Size(MB) field.

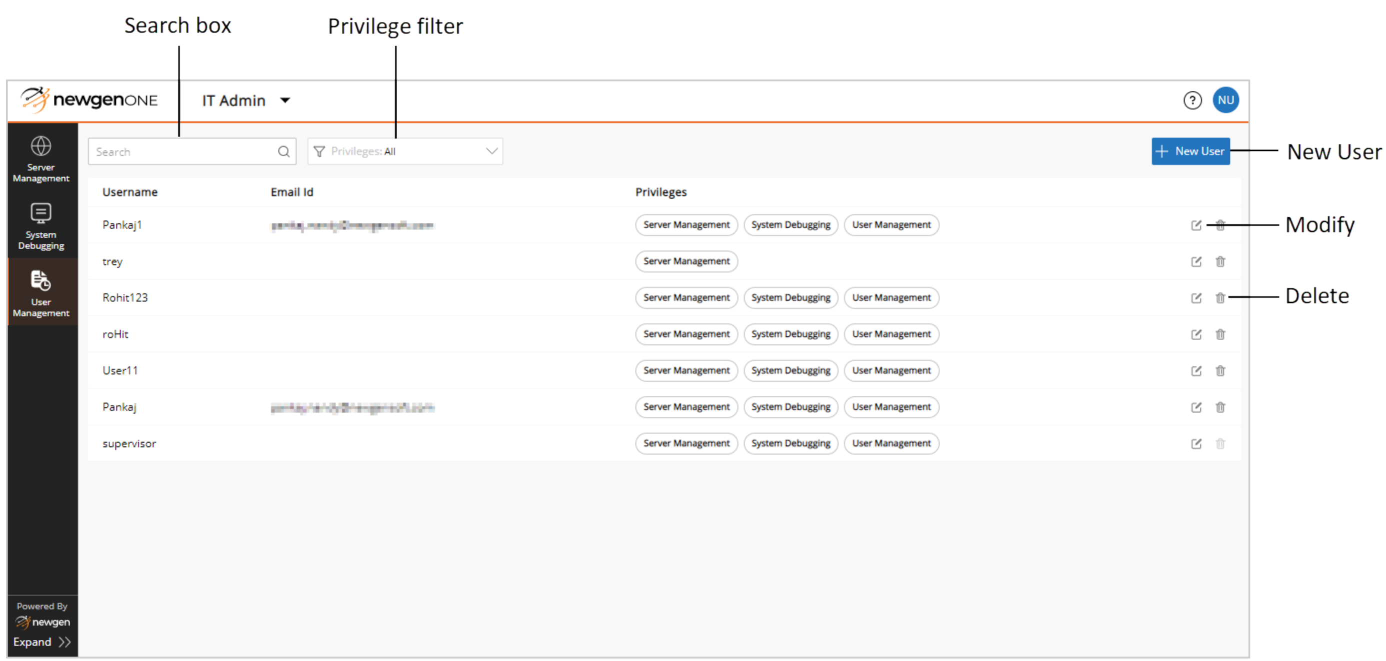


6. Enter the maximum number of log files in the Max Back Up Size Index field. When this limit is reached, the system automatically deletes the oldest file to create a new one.
7. Click **Modify**. On a successful modification of the appender, a confirmation message appears.

Managing users

User Management allows you to add or modify users and assign them the required user privileges.

From the navigation pane on the left, select **User Management**. The User Management page appears containing the following options:



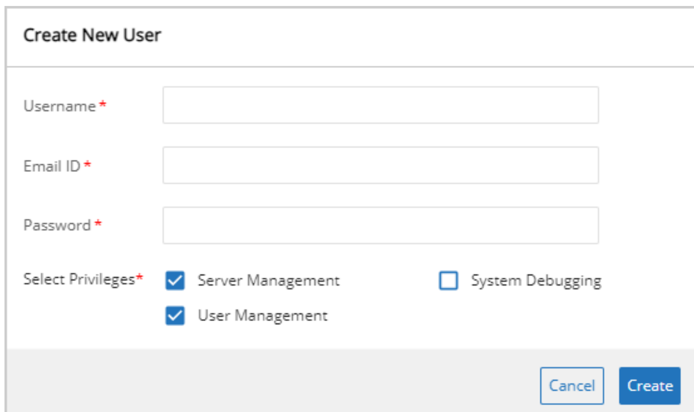
Options	Description
Search box	Allows you to search for a user.
Filter	You can filter users based on privileges. To filter users, click the filter icon and then select the required privilege. Users with the selected privilege appear.
+New User	Click **+New User** in the upper-right corner to add a new user. For more information, refer to the Creating a new user section.
Modify	Click the modify icon to modify an existing user.
Delete	Click the delete icon to delete an existing user.

Creating a new user

This section explains the process of creating a new user.

To create a new user, perform the following steps:

1. From the navigation pane, select **User Management**.
2. Click **+New User** given in the upper-right corner. The Create New User dialog appears.



3. Enter the username for the user.

Field	Description
Username	Username for the user account.
Email ID	Email ID of the user to associate with the user account.
Password	Password for the user account.
Select Privileges	Select the checkboxes to give the corresponding privileges to the user.

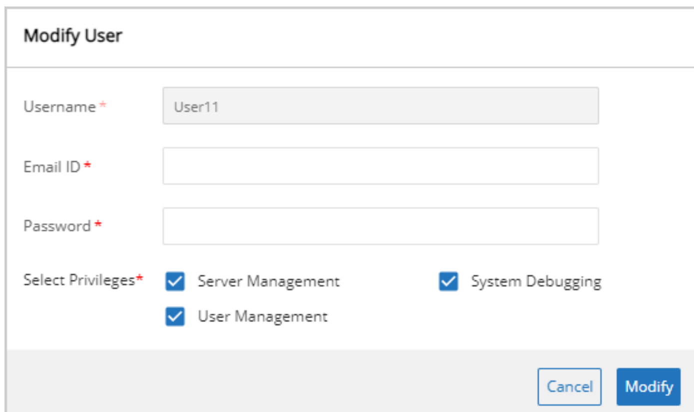
4. Click **Create**. The new user gets created successfully.

Modifying existing users

User Management allows you to modify the email ID, password, and other privileges of the users.

To modify a user, perform the following steps:

1. From the navigation pane, select **User Management**.
2. Click the modify icon adjacent to the user details. The Modify User dialog appears.



3. Enter the username for the user.

Field	Description
Email ID	Email ID of the user to associate with the user account.
Password	Password for the user account.
Select Privileges	Select the checkboxes to give the corresponding privileges to the user.

4. Click **Modify**. The user gets modified successfully.

Deleting a user

User Management allows you to delete the IT Admin users. You can also delete a user.

To delete a user, perform the following steps:

1. From the navigation pane, select **User Management**.
2. Click the delete icon 🗑 next to the user you need to delete. The Delete dialog appears.
3. Click **Continue anyway**. The user gets deleted successfully.