NewgenONE

System Admin

Administration Guide

Version: 2024.2

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Newgen Software, Registered Office, New Delhi
E-44/13, Okhla Phase 2
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 System Admin.

Revision history

Revision date	Description
November 2024	Initial publication

About this guide

This guide explains various aspects of user management, application management, system debugging, various system settings, and logs using the System Admin.

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 system administrators responsible for registering, monitoring, and managing users, groups, applications, components, workspaces, themes, services, and other system-level configurations for NewgenONE. No prior knowledge is required for comprehension of this guide. The user must have sufficient rights to configure and manage various settings available in the System Admin.

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

- The fundamentals and standard practices of your business area
- NewgenONE system administration activities

Related documents

The following documents are related to NewgenONE System Admin:

- NewgenONE Overview Guide
- NewgenONE Release Notes

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 System Admin allows you to handle administrative requests, assign and manage rights to profiles, users, groups, and roles. The System Admin facilitates options to manage various utilities as well as system settings to add and manage applications and external components, create and manage workspaces, themes, and more. With the NewgenONE System Admin, you can also access the system logs of the signed-in cabinet for debugging.

Getting started

This chapter explains how to access NewgenONE System Admin and its interface.

Accessing System Admin

Perform the following steps to access the System Admin:

1. Open the web browser.
2. Enter the Workspace Studio URL into the browser address bar as follows:

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 System Admin sign-in page appears.

3. (Optional) To change the locale of System 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.
4. Enter the following details:

Field	Description
Username	Enter the name of the System 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.

5. Click **Login** to start the session.
6. 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.
7. Select NewgenONE **System Admin** from the dropdown list available in the upper-left pane.

Getting familiar with System Admin

After successfully signing in to the System Admin, the My Inbox page appears by default.

The System Admin contains the following menu items:

Tab	Description
My Inbox	The My Inbox page allows you to manage and track various requests raised by other users as well as raise fresh requests.
Users & Groups Management	The Users & Groups Management page allows you to manage users, roles, groups, password policies, and cabinet properties.
Utility Management	The Utility Management page allows you to register and manage various services.
System Debugging	The System Debugging page allows you to access the logs of any module on the same cabinet for debugging system snags.
System Settings	The System Settings page allows you to manage applications, external components, language settings, logs, workspace theme, cabinet staging settings, and data object maker checker preferences.
Audit Log	The Audit Log page allows you to generate logs with various filter criteria.

The System Admin provides you with the options for:

- Accessing requests
- Managing users and groups
- Managing utilities
- System debugging
- Managing system settings
- Accessing logs

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

Accessing requests

My Inbox allows you to manage and track administrative requests. You can view received, sent, and operated requests. It allows you to filter operated requests and view them as per requirement.

My Inbox page does not show any request by default. Turn on the maker checker functionality to enable this feature. To know the procedure to activate the maker checker functionality, see Managing cabinet properties.

Perform the below steps to access My Inbox:

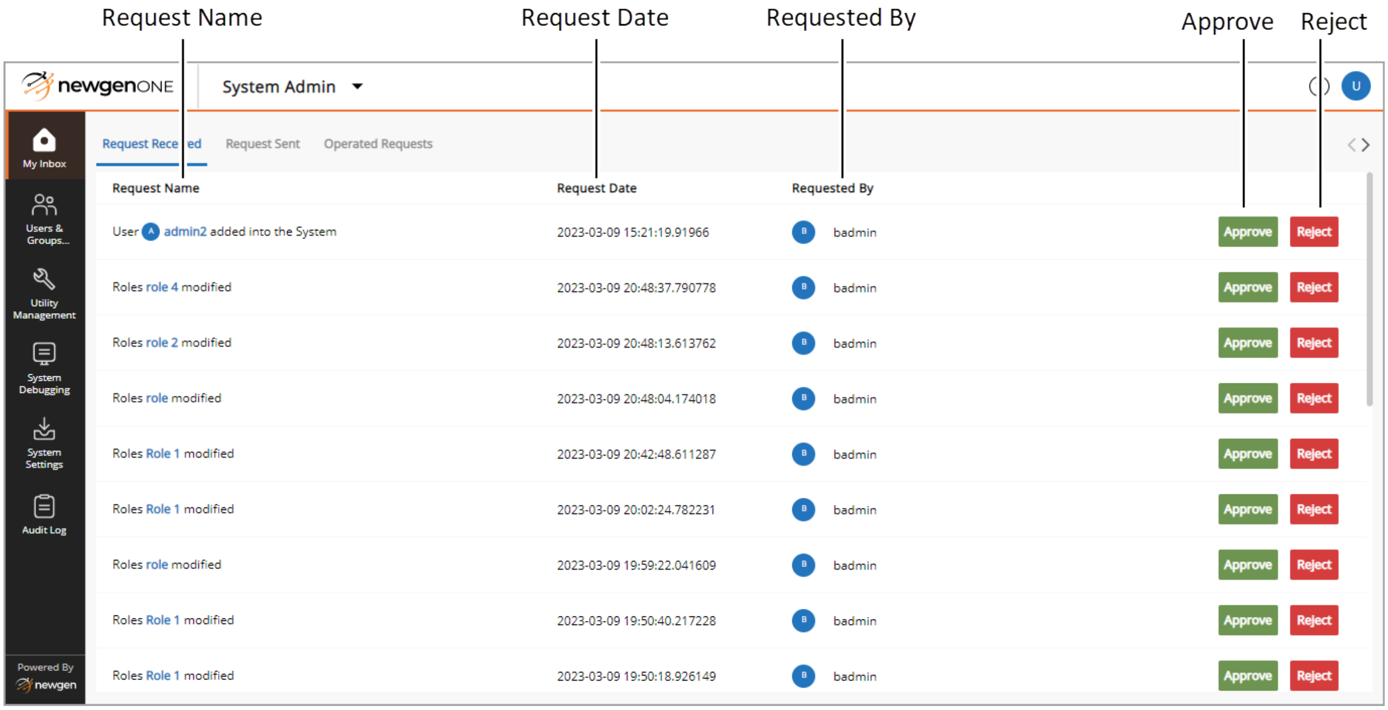
1. Sign in to System Admin Workspace.
2. Click **My Inbox**. My Inbox page appears.

My Inbox contains the following tabs:

- Request Received
- Request Sent
- Operated Requests

Managing received requests

The Request Received tab displays the requests you have received for approval. When you open My Inbox, the Request Received tab appears by default.



The Request Received tab consists of the following information and options:

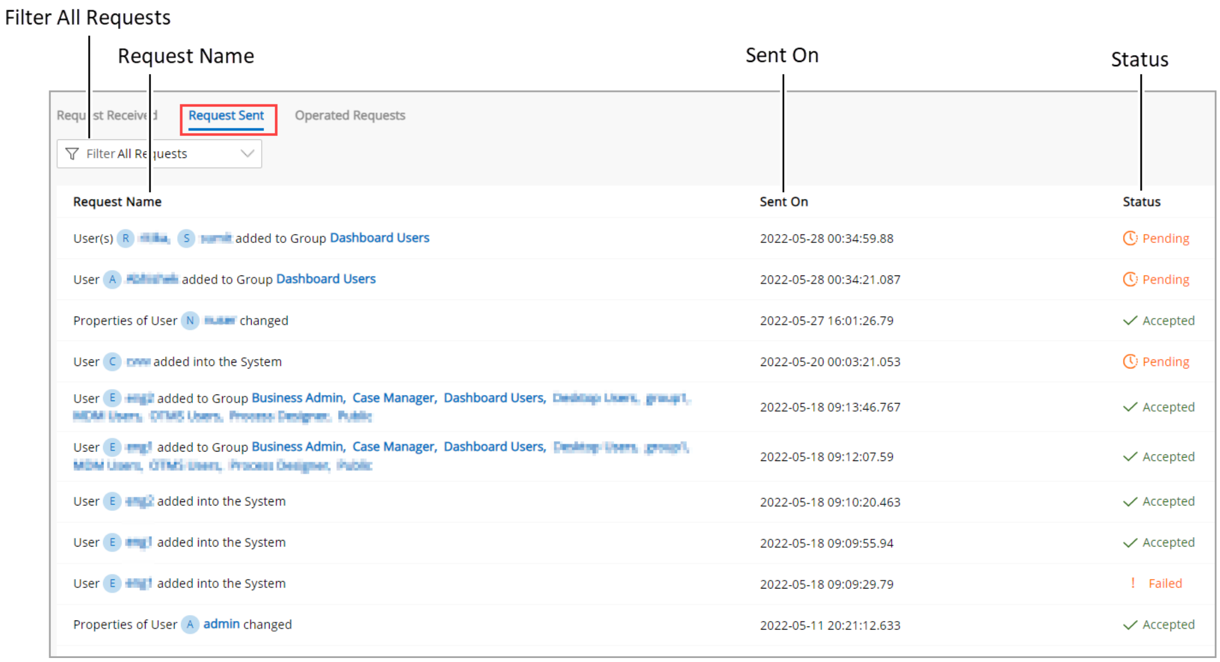
Option	Description
Request Name	Displays the request name.
Request Date	Displays the request introduction date.
Requested By	Displays the name of users that sent the request for approval.
Approve	To approve a request, click **Approve** adjacent to the request.
Reject	To reject a request, click **Reject** adjacent to the request.

Sent requests

The Request Sent tab displays your requests that are sent for approval.

Perform the below steps to access the sent requests:

1. Go to the My Inbox. The My Inbox page appears.
2. Click **Request Sent**. The Request Sent tab appears.



The Request Sent tab consists of the following information and options:

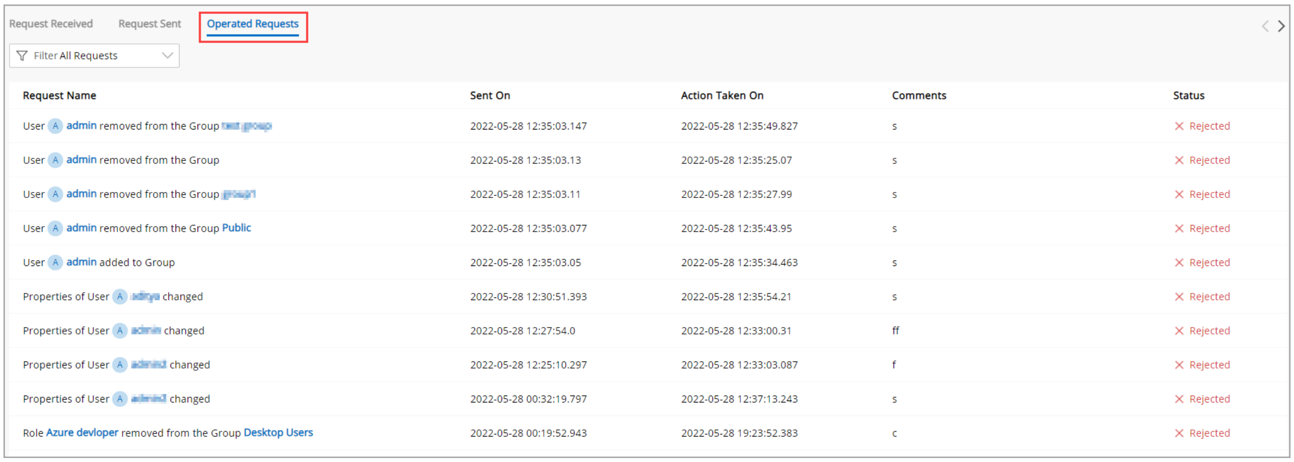
Option	Description
Filter All Requests	Select the Filter Request using the dropdown ﹀ given in Filter All Requests in the left pane. The Filter All Requests section contains the following options: • Pending Requests • Approved Requests • Rejected Requests • Failed Requests
Request Name	Displays the request name.
Sent On	Displays the request sent date and time.
Status	Displays the report status that is pending, accepted, failed and more.

Operated requests

The Operated Requests tab displays the requests that are already accepted or rejected.

Perform the below steps to access the Operated Requests:

1. Go to the My Inbox. The My Inbox page appears.
2. Click **Operated Requests**. The Operated Requests tab appears.



The Operated Requests tab contains the following:

Option	Description
Filter All Requests	Select the Filter Request using the dropdown given in Filter All Requests in the left pane. The Filter All Requests section contains the following options: • Pending Requests • Approved Requests • Rejected Requests • Failed Requests
Request Name	Displays the request name.
Sent On	Displays the request sent date and time.
Action Taken On	Displays the date and time of the action taken upon the requests.
Comments	Displays the comments given on the requests.
Status	Displays the report status that is accepted or rejected.

Managing users and groups

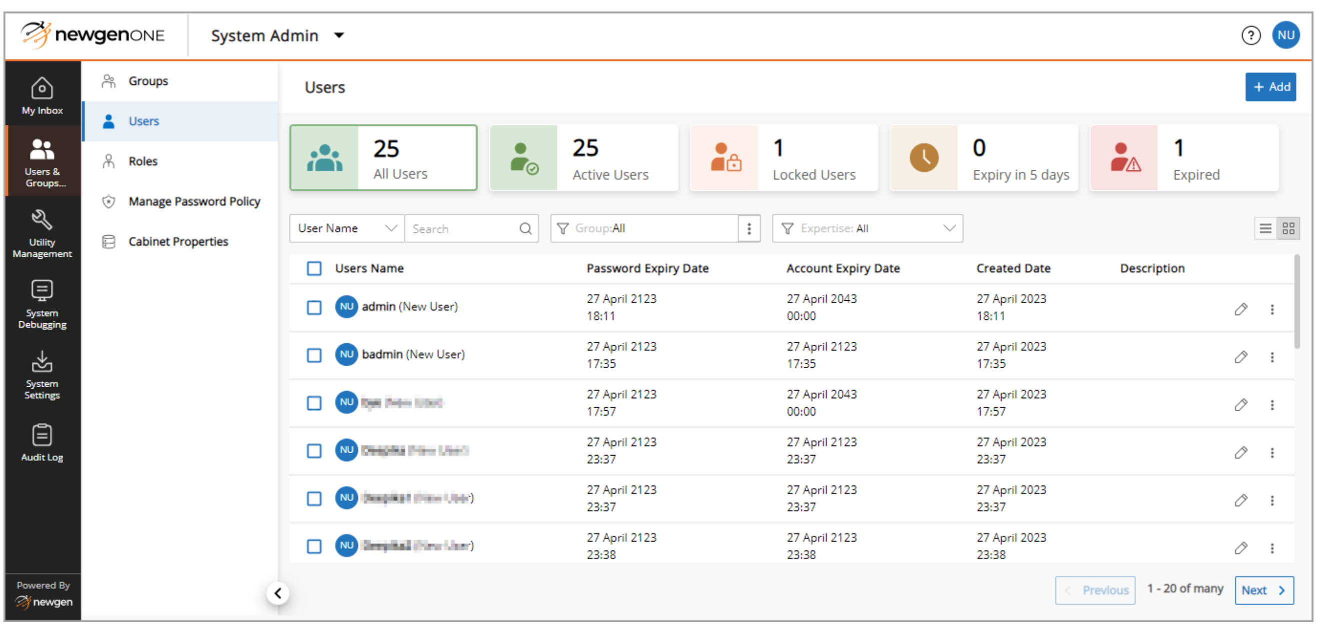
For defining the rights in a process, the System Admin provides you with the Users & Groups Management menu item. The Users & Groups Management consists of users, groups, and roles menus for assigning and managing rights accordingly. You can define rights on folders and documents. Access rights allow you to share documents, folders, data classes, and annotations with other users of the group. You can also assign rights to other users, groups, and roles on the documents and folders, which are created by you.

Using Users & Groups Management, you can manage password policy and set cabinet properties.

For example, a system administrator can modify user privileges and assign users to different groups if there is some corporate structure change within the organization.

Perform the below steps to access the Users & Groups Management:

1. Sign in to System Admin Workspace.
2. Click **Users & Groups Management** on the navigation pane. The Users & Groups Management page appears.



The chapter discusses the following topics:

- Managing groups
- Managing roles
- Managing users
- Managing password policy
- Managing cabinet properties

Managing groups

Every user created by an administrator in the system must be a member of at least one user group.

The following groups are created by default while creating a cabinet.

- Everyone
- Supervisor
- Public

To access the Groups sub-menu, perform the following steps:

1. Go to Users & Groups Management.
2. Click **Groups**. The Groups sub-menu appears.

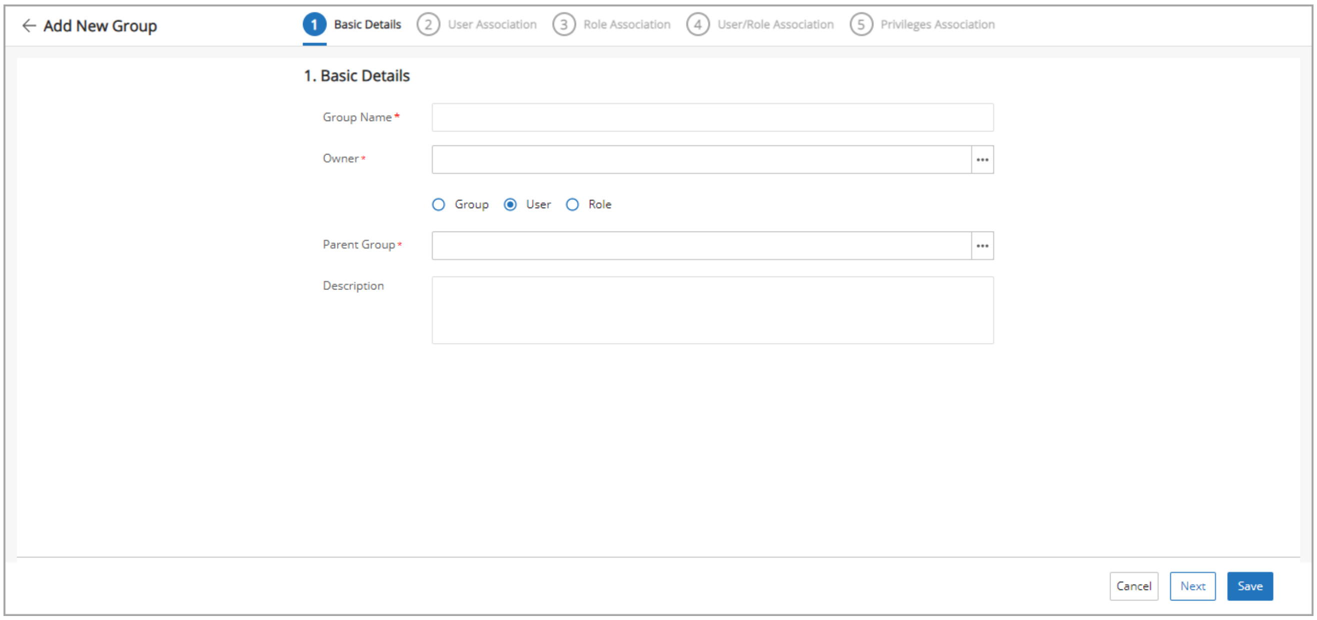
The Groups sub-menu consists of the following options:

Option	Description
Search Box	Allows you to search a group with its name.
Add	To add the new group, click **Add**. For more information, see Adding a group.
List View	To view the groups in list-view, click the list view icon .
Table View	To view the groups in table-view, click the table view icon .

Adding a group

To add a group, perform the following steps:

1. Go to Users & Groups Management.
2. Click **Groups**. The Groups sub-menu appears.
3. Click **+Add** in the upper-right corner. The Add New Group page appears.



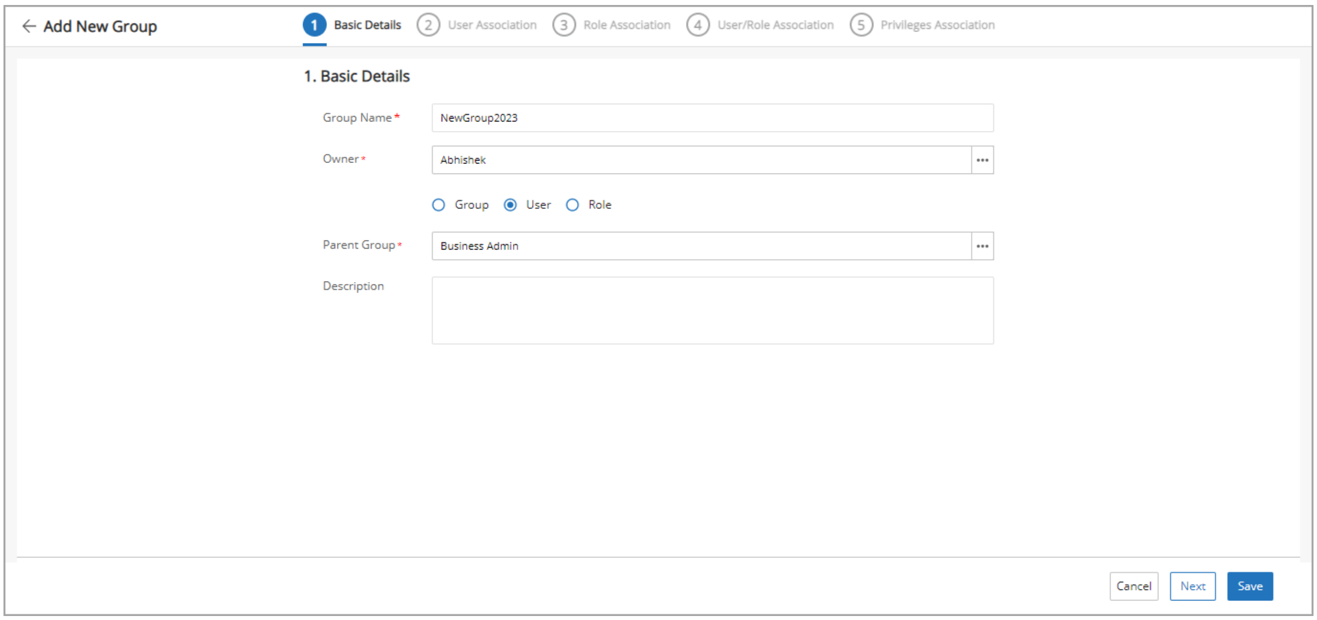
On the Add New Group page, Enter the necessary details in the following tabs:

- Basic Details
- User association
- Role association
- User/Role association
- Privileges association

Basic Details

Perform the following steps in the Basic Details tab:

1. Enter the **Group Name**.



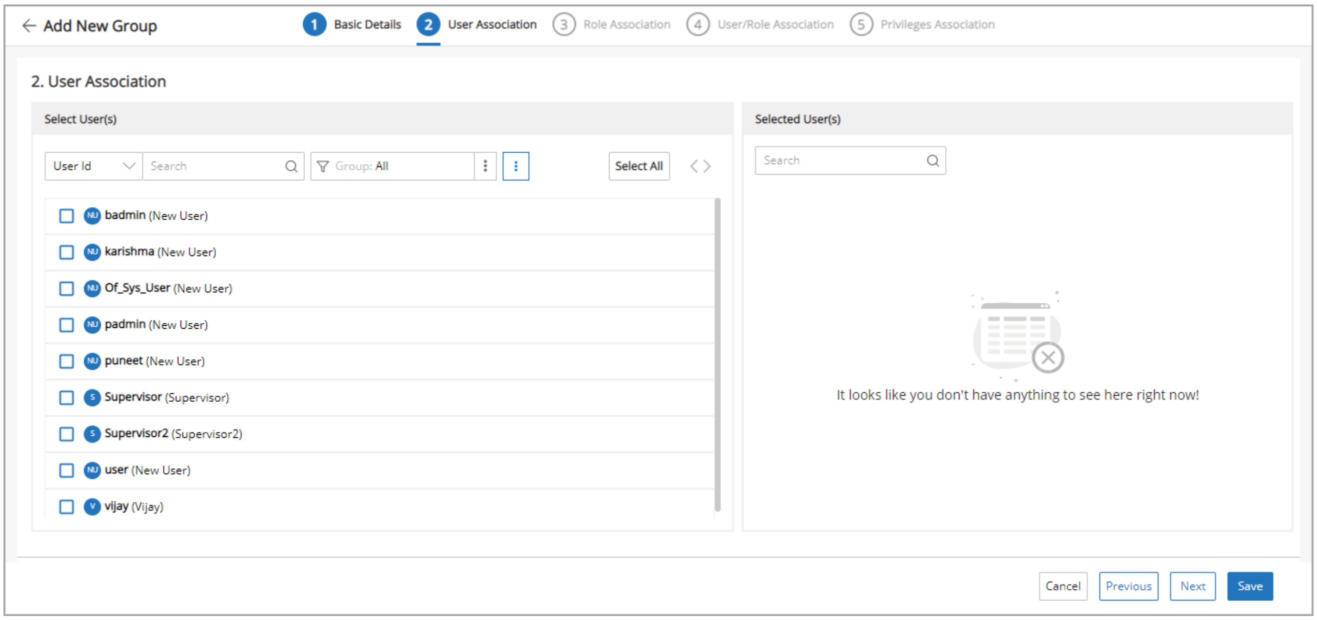
2. To select the owner, click the ellipses ••• icon adjacent to the Owner field. The Select Owner dialog appears.
3. Select **User** through User Name or User id using the .
4. Select Group filter using the .
5. Click to select the ratings.
6. Click **Save**. The owner's details get saved.
7. To select the parent group, click the ellipses ••• icon adjacent to the Parent Group field. The Select Parent Group dialog appears.
8. Select a group. You can use the search box to find the required group.
9. Click **Save**. The parent group gets saved.
10. (Optional) Enter a description of the group in the Description textbox.
11. Click **Save**. A message dialog appears to confirm the successful creation of the group. This dialog also asks you to confirm if you want to continue with the remaining steps or skip them.
12. Click **Yes, Continue** to continue with the remaining steps. The User Association tab appears.

Click **Cancel** to close the add new group screen.

User Association

Perform the following steps in the User Association tab:

1. Select the checkbox given adjacent to the required users.



You can use the searching and sorting options to get the user you require. You can search in the following ways:

- Sort the user through the user name or personal name using the dropdown. Here, personal name refers to the first name of the user.
- Click the filter icon. The Group Filter dialog appears.
- Select the required group using the dropdown and then click **Apply**.
- Click ⋮. The filter dialog appears.
- Select the Ratings. The Selected Users appear on the right.

2. (Optional) Click **Select All** to select all the users.

To remove all users, click **Remove All**. Else, click the remove × icon to remove the user one by one.

3. Click **Save**. The User Association details get saved.

4. Click **Next**. The Role Association tab appears.

Role Association

Role Association allows you to select the roles that you want to associate with a user in the group.

To associate necessary roles, perform the following steps in the User Association tab:

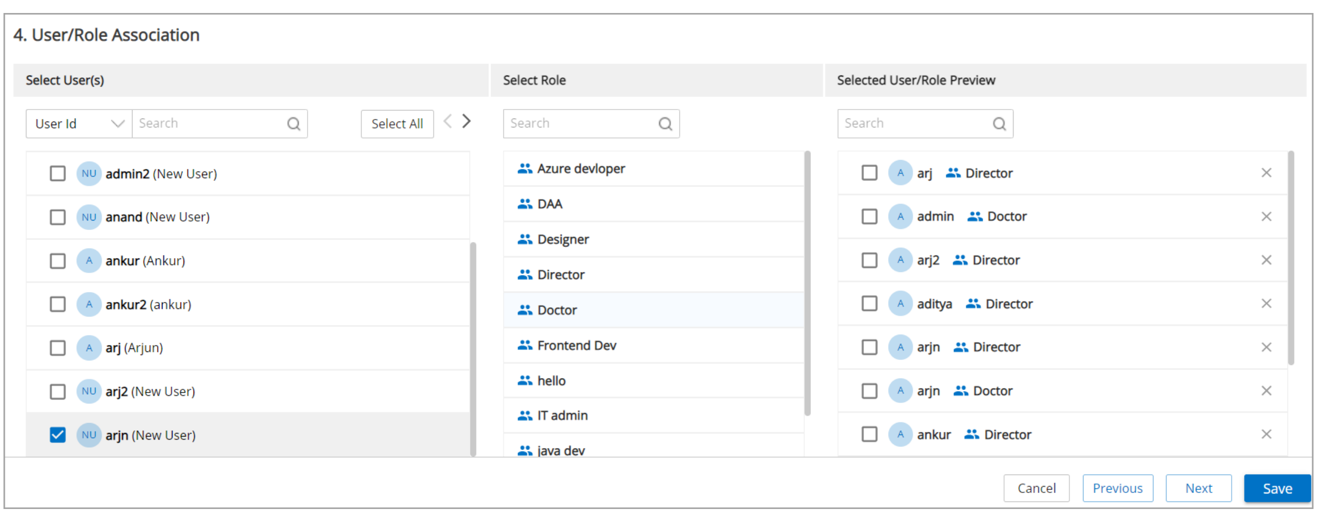
1. In the Select Role section, select the checkbox next to the required roles. The selected roles appear in the Selected Roles section on the right.
2. (Optional) Click **Select All** to select all the available roles in the Select Role section at once.
3. Click **Next**. The User/Role association tab appears.

User/Role Association

In this step, you can assign roles to one or more users of the group.

Perform the following steps in the User/Role association step:

1. Select the checkbox given adjacent to the required Username or Personal Name. You can search the required users through Personal Name or Username using the dropdown. Here, personal name refers to the first name of the user.



2. (Optional) Click **Select All** to select all users.

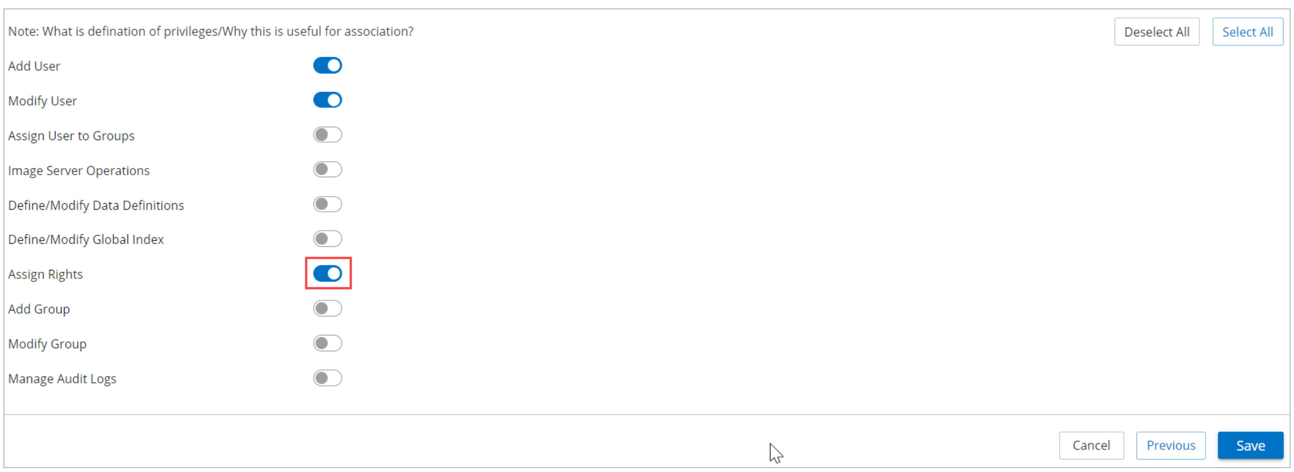
> To remove the selected user, click **Delete**. Else, click the remove × icon to remove the user.

3. Click the required role.
4. Select the checkbox given adjacent to the user and role in the Selected User/Role Preview to select the user with its role.
5. Click **Save**. The user-role association details get saved.
6. Click **Next**. The Privileges Association tab appears.

Privileges Association

Perform the following steps in the Privileges Association tab:

1. Select the privileges you want to give to the user-role association.



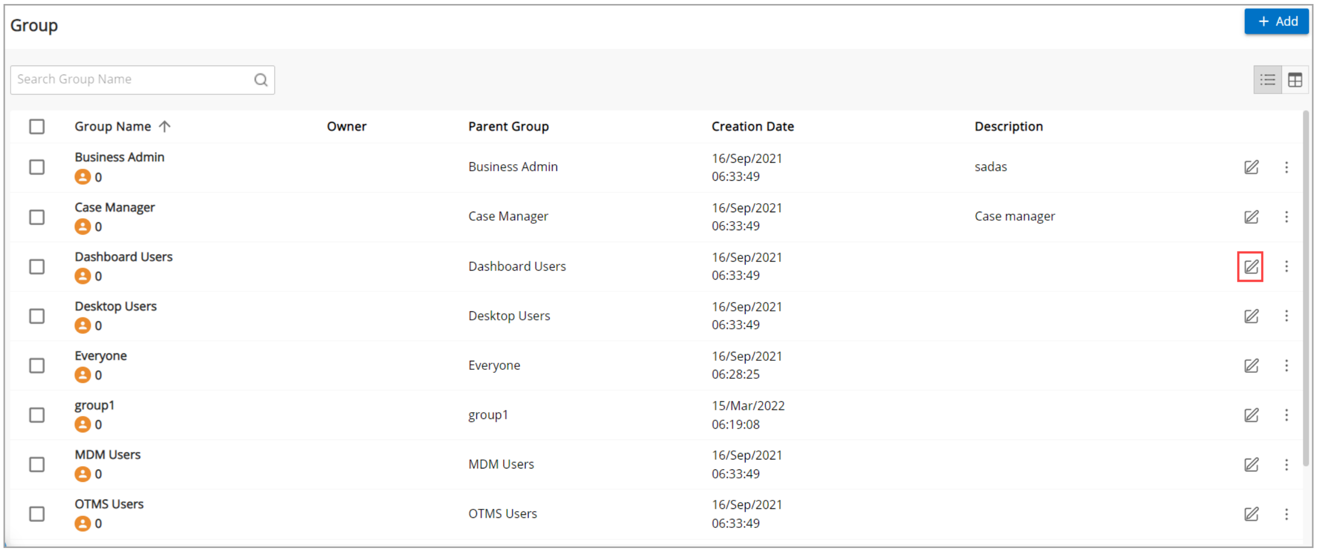
2. (Optional) Click **Select All** to select all the privileges.
3. Click **Save**. The New Group gets added.

> Click **Deselect All** to remove the selected privileges. Click **Previous** to go back to the User/Role Association window or click **Cancel** to close the Add New Group window.

Modifying a group

To modify the group, perform the following steps:

1. Go to the Groups. The Groups sub-menu appears.



2. Click the modify icon given adjacent to the description column. The Groups contains the following tabs:
    - Basic Details
    - User Association
    - Role Association
    - User/Role Association
    - Privileges Association

You can modify the group details in the above-mentioned tabs.

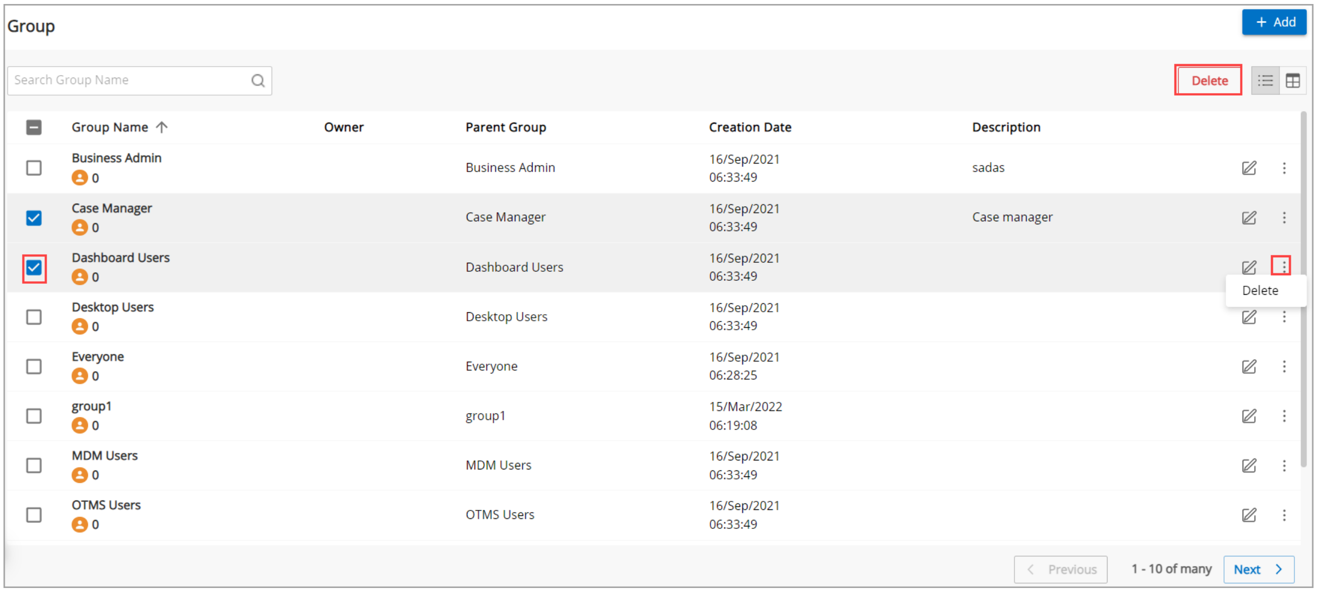
3. Click **Save** to save the edit details in the group.

Click **Cancel** to close the page.

Deleting a group

Perform the below steps to delete the group:

1. Go to the Groups. The Groups sub-menu appears.



2. Select the checkbox adjacent to the required group names.
3. Click **Delete** in the upper-right corner to delete selected groups.

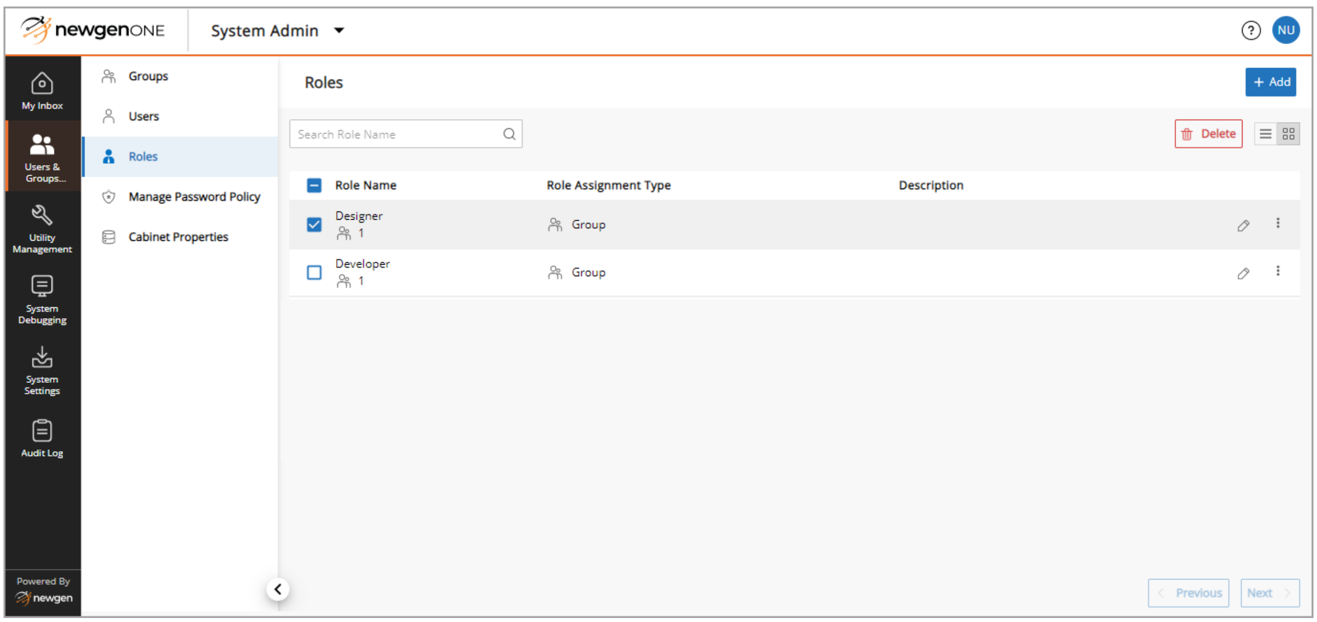
Click the ellipses ⋮ given adjacent to the description column to delete the single group.

Managing roles

A user in the system can perform some defined roles. The Roles tab displays the list of roles added to the process.

Perform the below steps to access the Roles:

1. Go to the Users & Groups Management.
2. Click **Roles**. The Roles page appears.



The Roles tab contains the following options:

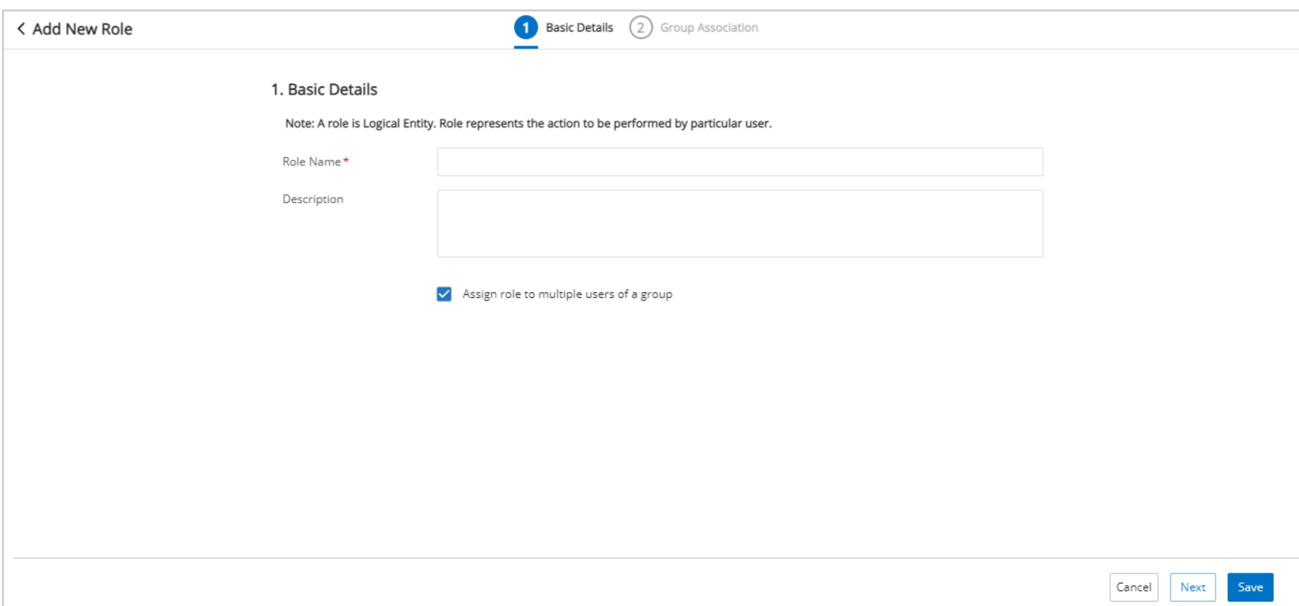
Option	Description
Search Box	You can search the role with its name using the search box.
Add	Click **Add** to add the new role. For more information, refer to the Adding a role section.
List View	Click given in the upper-right to view the role in the list view.
Table View	Click given in the upper-right to view the role in the table view.

Option	Description
More Options	Click ⋮ the following actions appears: • Rate User • Add to Queue • Set Diversions • Set Work Audits • Work Audit Details • Open as Modal You can edit the above fields by clicking on them.

Adding a role

Perform the below steps to add a role:

1. Go to the Roles sub-menu under Users & Group Management.
2. Click **+Add** given in the upper-right corner. The Add New Role window appears.



3. Enter the name of the role in the **Role Name** field.
4. (Optional) Enter a **Description** if required.
5. Select the Assign the role to multiple users of a group checkbox if required.
6. Click **Next**. The Group Association tab appears.

7. Select the checkbox given against the group(s) name. The selected group(s) appear on the right.

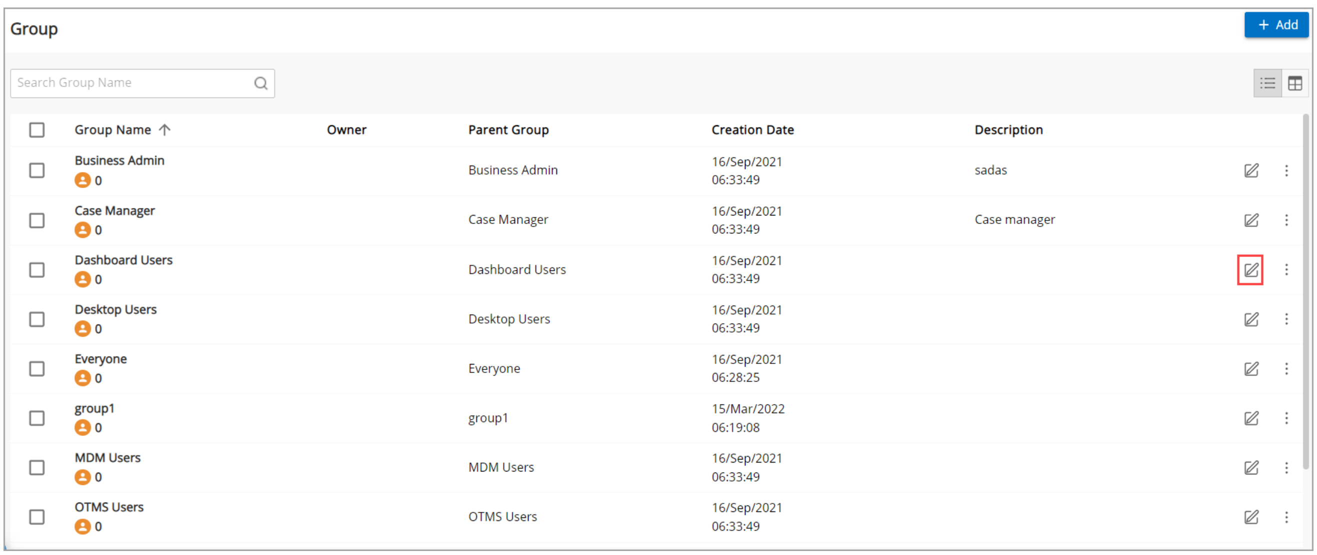
> You can use the search box to search for a group with its name. Click **Select All** to select all the group(s).

8. Click **Save**. The new role gets added.

Modifying a role

Perform the following steps to modify the role:

1. Go to the Roles sub-menu under Users & Groups Management.



2. Click Modify given adjacent to the description column. The Basic Details page appears.
3. Select the checkbox given in basic details to assign roles to many users in a group.
4. Click **Save**. The Group Association page appears.

Specify the following in the Group Association:

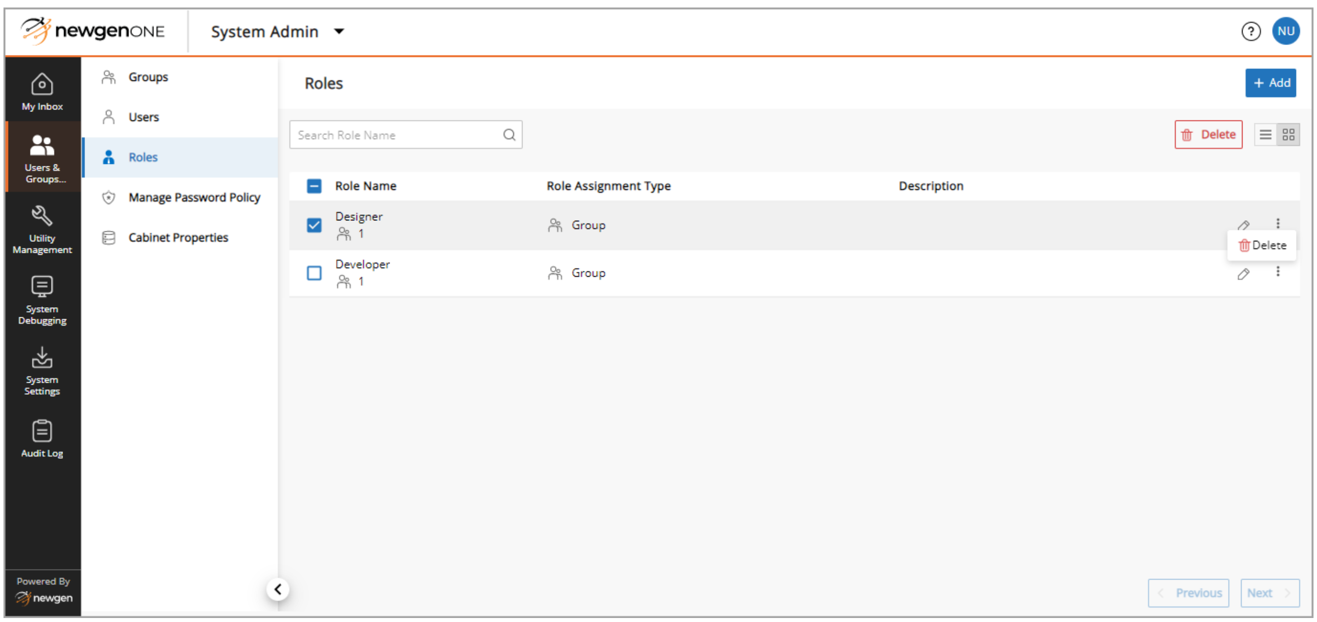
Option	Description
Associate Group	Select the checkbox given adjacent to the Groups name to associate the group in the role.
Delete	Click ellipses ⋮ to delete the group.

Option	Description
Search Box	Enter the group name in the search box to search Group.
Select All	Click **Select All** to select all the groups.
Save	Click **Save**. The Roles get modified.
Cancel	Click **Cancel** to close the edit role page.

Deleting a role

Perform the below steps to delete the role:

1. Go to the Role. The Role window appears.



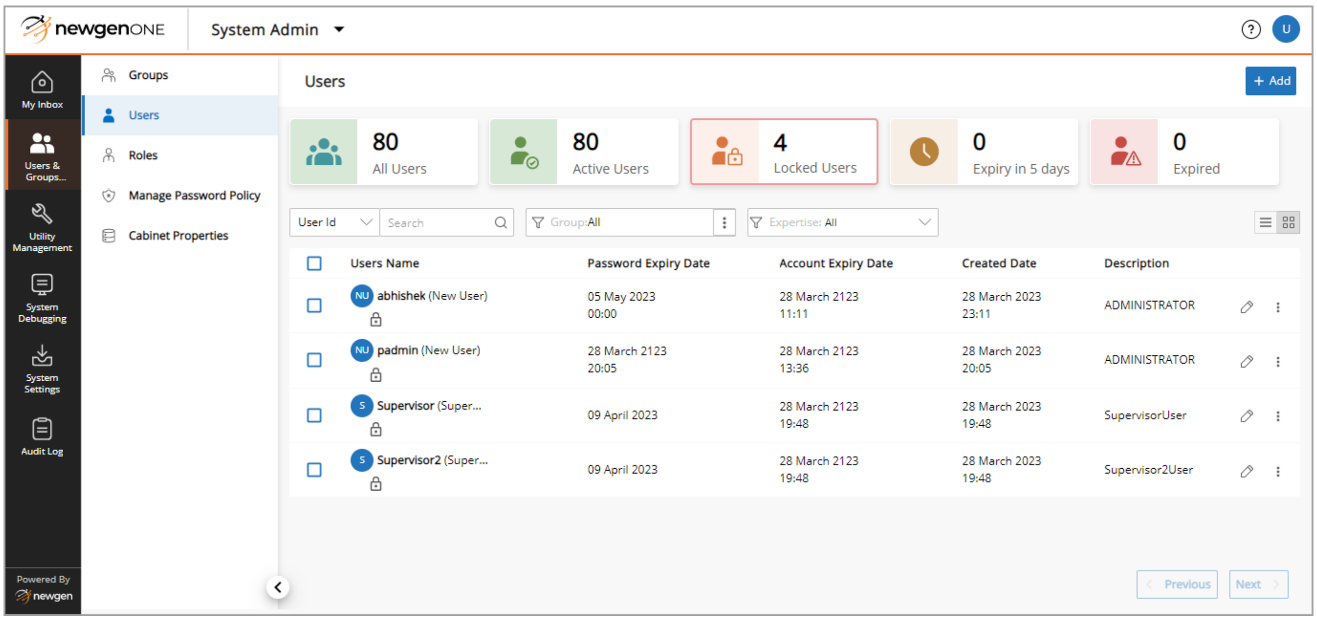
2. Select the checkbox given adjacent to the required Role Name.
3. Click **Delete** given in the upper-right to delete selected groups.

> Alternatively, you can click ⋮ adjacent to the description column and then click **Delete** to delete a specific role.

Managing users

Any person using the NewgenONE platform is referred to as a user in the system. The System Admin workspace allows you to create and manage users.

1. Go to the Users & Groups Management.
2. Click **Users**. The Users sub-menu appears.



The Users page contains the following options:

Option	Description
All Users	This tile displays the total number of users.
Active Users	This tile displays the active users present in the system.
Locked Users	This tile displays the locked users of the system.
Expiry in 5 days	This tile displays the number of accounts that are about to expire in five days.
Expired	This tile displays the number of accounts that are already expired.
Search Box	Click the dropdown icon to select the name type that you want to search You can search the user with its name using the search box.
Group	Click the dropdown icon and select a Group to view the users of the group.

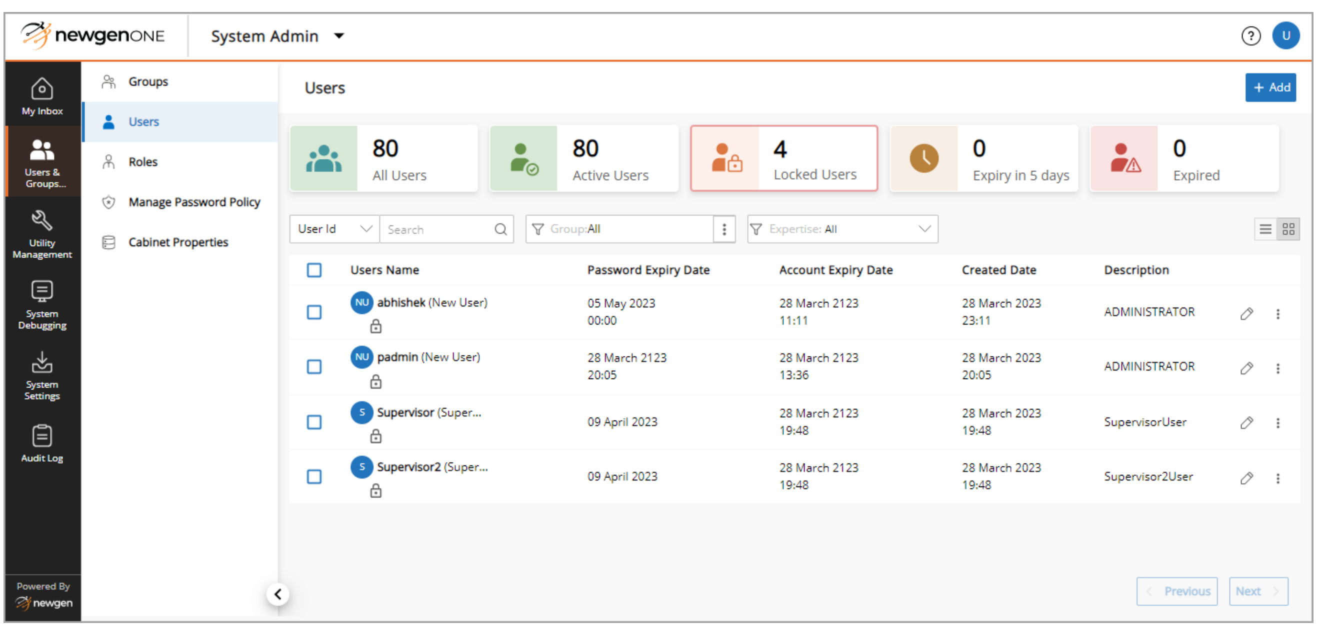
Option	Description
Expertise	Click the dropdown icon and select the expertise to view the users with that expertise.
Add	Click **+ Add** to add the new users. For more information, refer to the add new user section.
Edit	Click the edit icon to alter the details of existing users.
Delete	Click the ellipsis icon and then click the delete icon to remove an existing user.
List View	Click the list view icon to view the users in the list view.
Table View	Click the table view icon to view the role in table view.

Adding a user

This section explains how to add a user.

To add a user, perform the following steps:

1. Go to the Users & Groups Management.
2. Click **Users**. The Users sub-menu appears.
3. Click **+Add** given in the upper-right corner. The Add New User window appears.



4. Enter the required details in the following tabs:
    - Basic Details
    - Group Association
    - Privileges Association
5. Click **Save**. The user is now created.

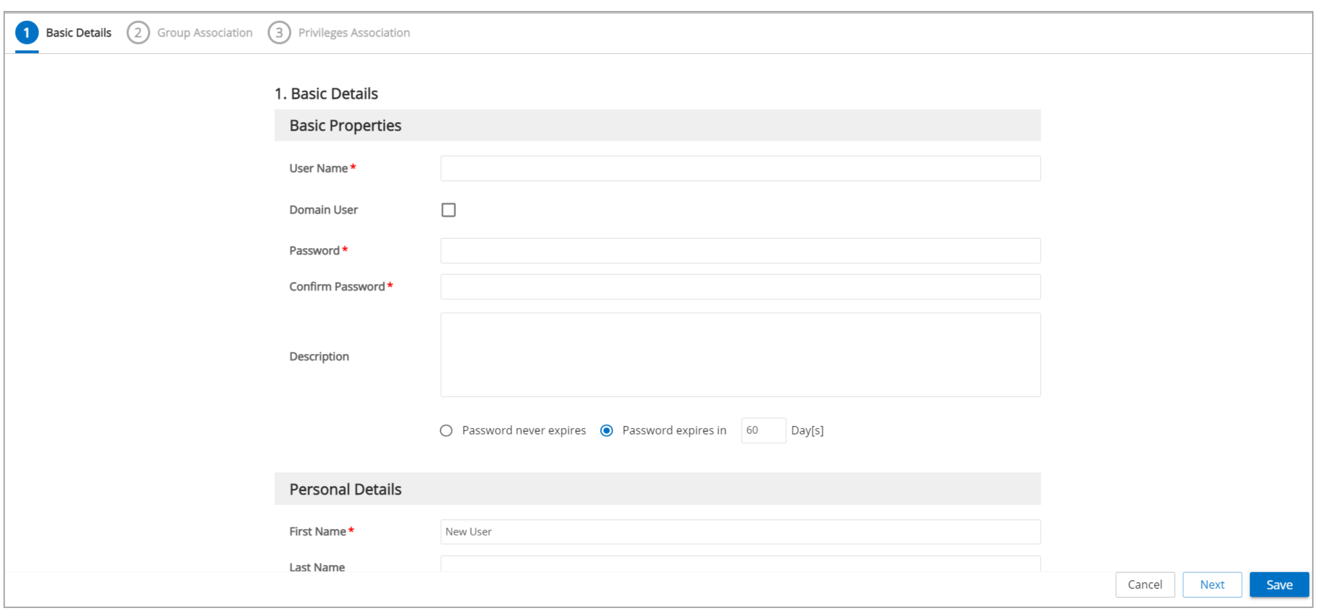
Basic Details

Perform the following operations in the Basic Details tab:

1. Enter the following details as required:

Option	Description
Basic Properties	
User Name	Enter the User Name.
User Profile	Click the upload icon, browse the required profile image, and click **Open**.
Domain User	Select the Domain User checkbox for the domain users. This disables the password and the Confirm Password fields.
Password	Enter the password as per your requirement.
Confirm Password	Re-enter the password to confirm the password.
Description	(Optional) Enter a user description.
Password Expires	Select any of the following password security: • Select the checkbox never expires to set the password without the expiry date. • Select the checkbox Password expires to set the password expiry date. • Enter the password expiration day.
Personal Details	
First Name	Enter your first name in the personal details section.
Last Name	Enter your last name in the personal details section.
Email ID	(Optional) Enter your Email ID.

Option	Description
Fax No.	(Optional) Enter your Fax No.
User Account/Immediate Supervisor	
Account Expiry Date	Select the Account Expiry date using the date picker in the user account section.
User Active	Select the User Active radio button to make the user an active user.
Parent Group	Click ••• to select the parent group. The Select Parent Group page appears. Select the Group and click save.
Immediate Superior	
Group	Click ••• to select the group. The Select Group page appears. Select the Group and click **Save**. The Role selection option appears after the group selection.
User	Perform the following to select the user: • Click ellipses ••• to select the User. The Select User page appears. • Select the User with its name or Id. • Click the dropdown to select the group filter and click **Save**.
No Superior	Select this option to keep the user independent of the immediate supervisor.

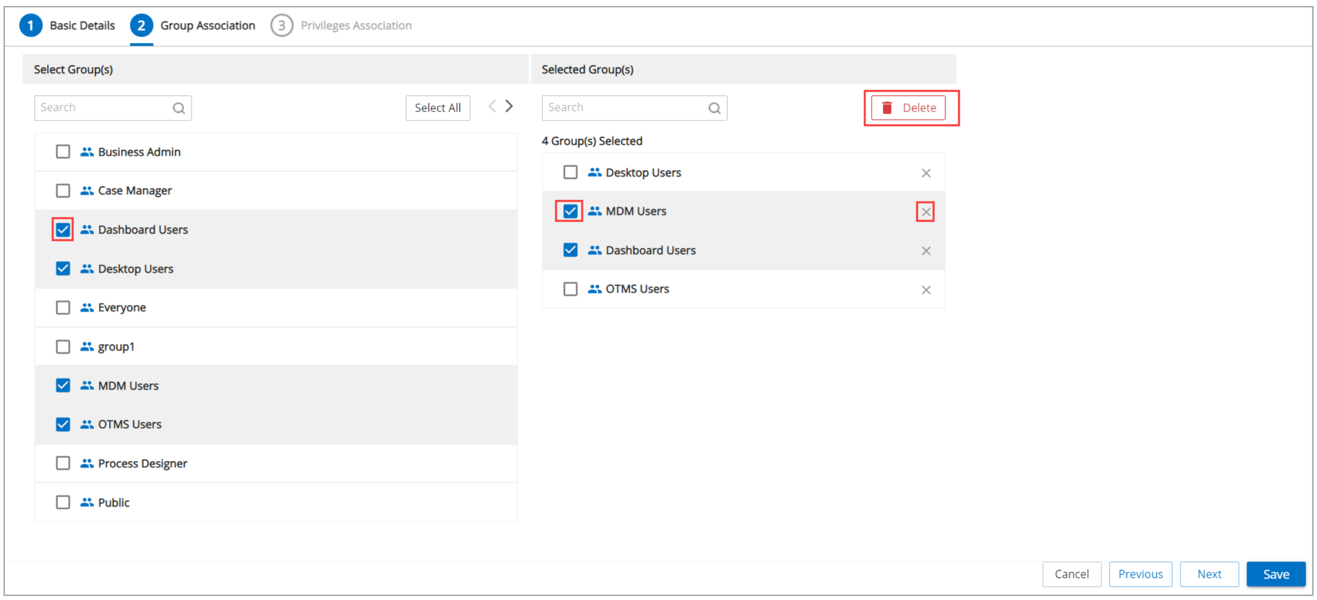


2. Click **Next**.

Group Association

Perform the following steps in the Group Association:

1. Select the checkbox adjacent to the group name to select the group. The added group(s) appear on the right pane.



> You can search the group with its name using the search box. Also, you can click Select All to select all the group(s).

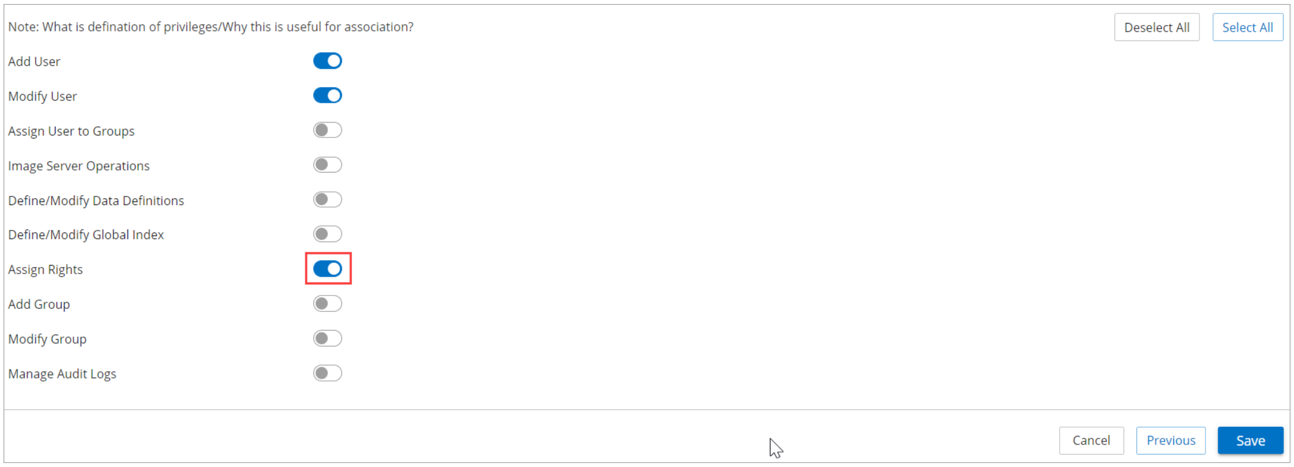
2. Click the remove icon ✕ to remove the added group given in the right pane.
3. Select the checkbox given adjacent to the added group(s) and click **Delete** to delete the multiple added group(s).
4. Click **Save**. The Group Association details get saved.
5. Click **Next**. The Privileges Association window appears.

> Click **Cancel** to close the group association screen.

Privileges Association

Perform the following steps in the Privileges Association tab:

1. Select the privileges you want to give to the user-role association.



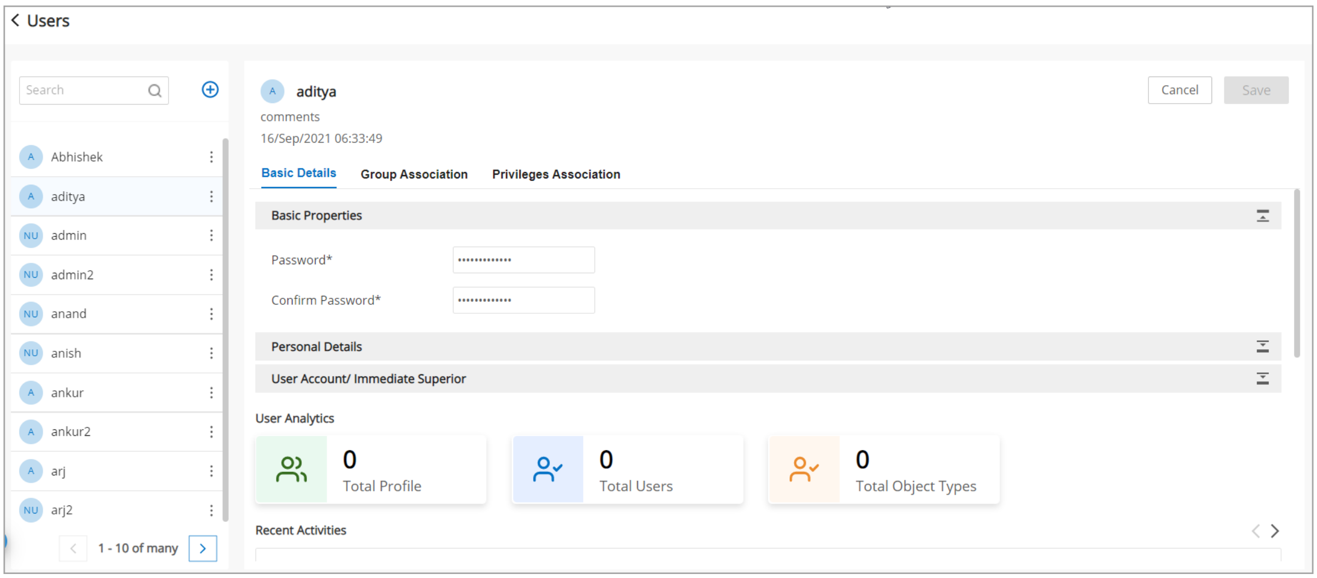
2. (Optional) Click **Select All** to select all the privileges.
3. Click **Save**. The New Group gets added.

> Click **Deselect All** to remove the selected privileges. Click **Previous** to go back to the User/Role Association window or click **Cancel** to close the Add New Group window.

Modifying a user

To modify existing users' details, perform the following steps:

1. Go to Users & Groups Management > Users.
2. Click the edit icon adjacent to the required user. The user details appear.



The User Details section consists of the following tabs:

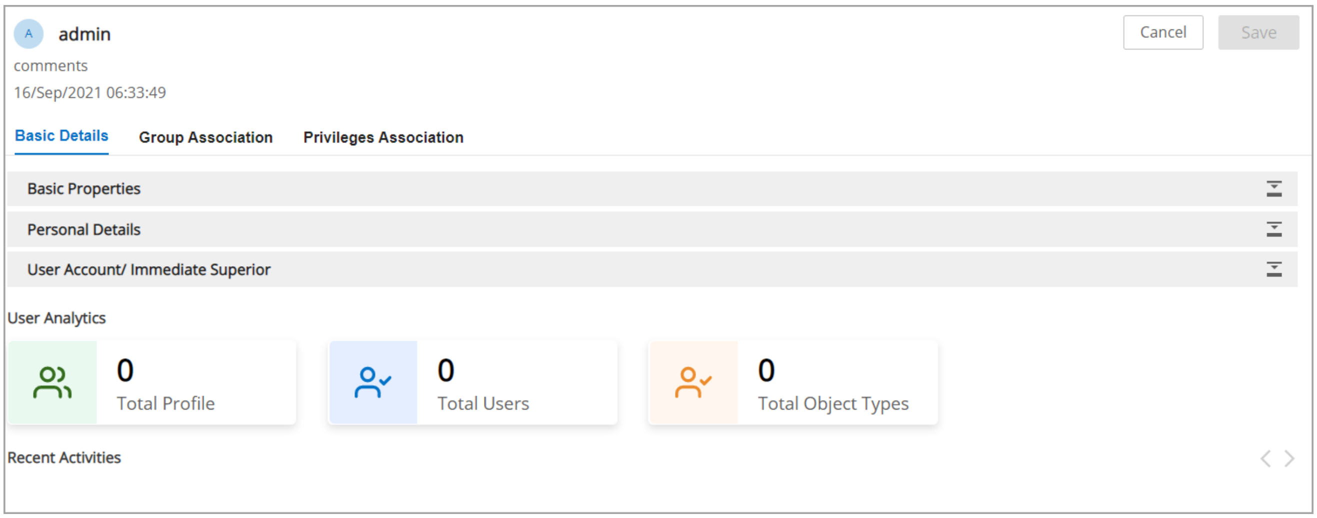
- Basic Details
- Group Association
- Privileges Association

Click the add icon on the left pane to add a new user. For more information, refer to the adding a new user section. You can also search for a user using the search box given in the left pane.

Basic Details

Perform the following steps in the Basic Details tab:

1. Enter the password and confirm the password in the basic properties section.

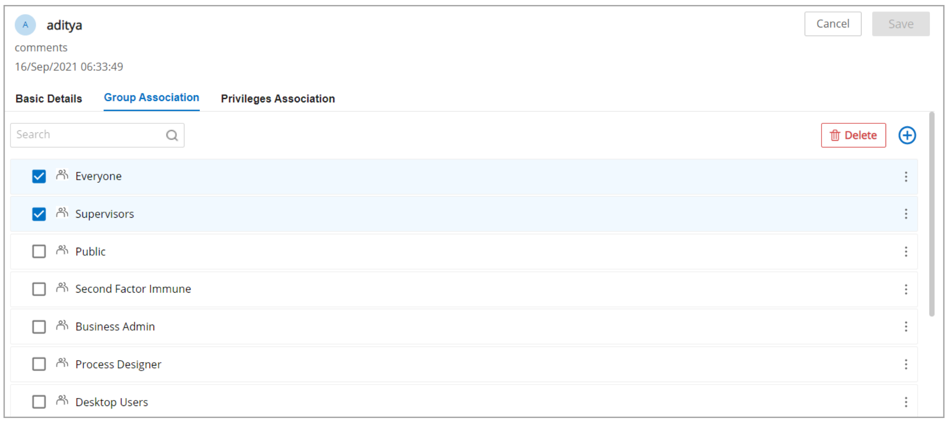


2. Specify the following in the personal details section:
    a. Enter the First Name.
    b. (Optional) Enter the Last Name, Email Id, and Fax Number.
3. Click **Save**. The basic details section gets modified.

Group Association

Perform the following steps in the Group Association tab:

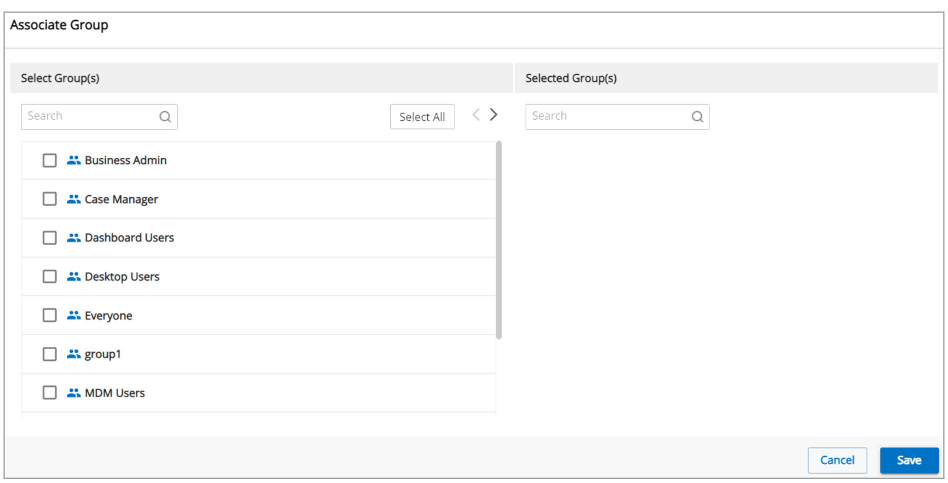
1. Select the checkbox adjacent to the required user roles to associate with groups.



2. Click the ellipses icon ⋮ adjacent to the group name in the right pane to delete the group.

> To delete multiple groups, select the group checkbox and click **Delete**.

3. Click the add icon ⊕ to associate a group. The Associate Group page appears.
   a. Select the group checkbox to select the group you require.
   b. Click **Save** to associate the group.

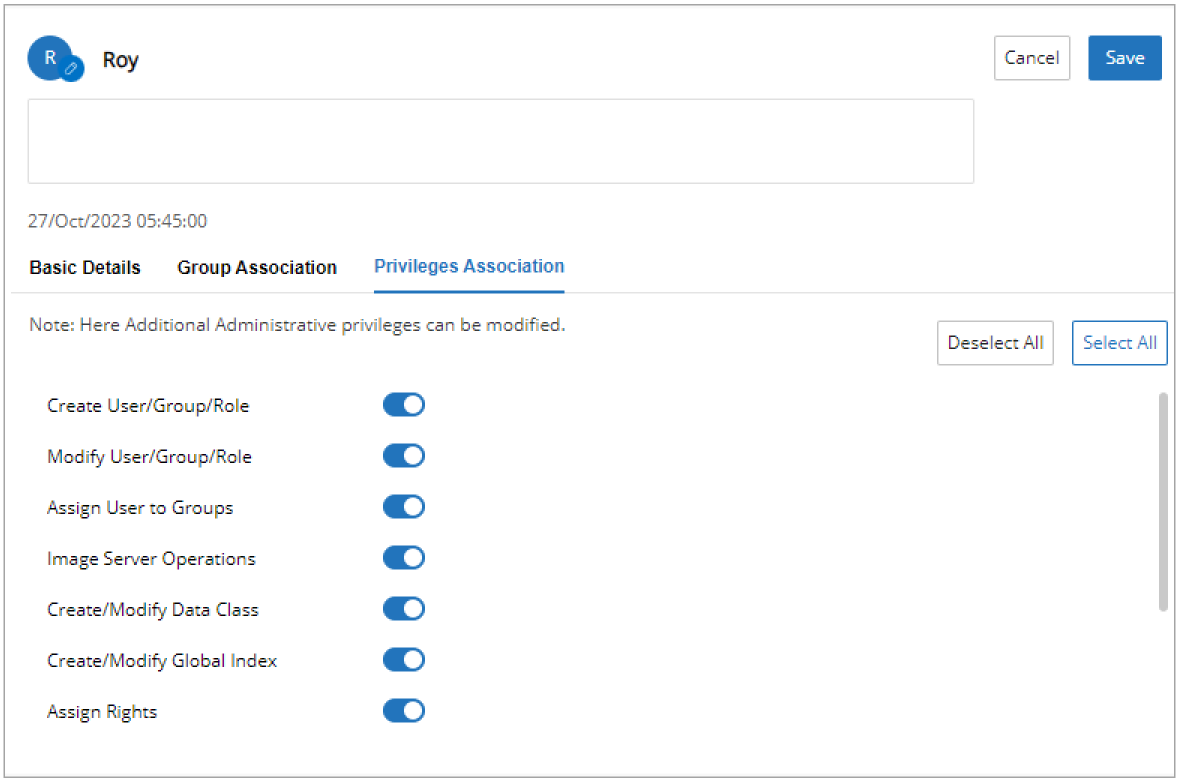


> Click **Select All** to select all group(s). You can also search the group with its name using the search box.

Privileges Association

Perform the following steps in the Privileges Association tab:

1. Select the privileges that you want to modify.

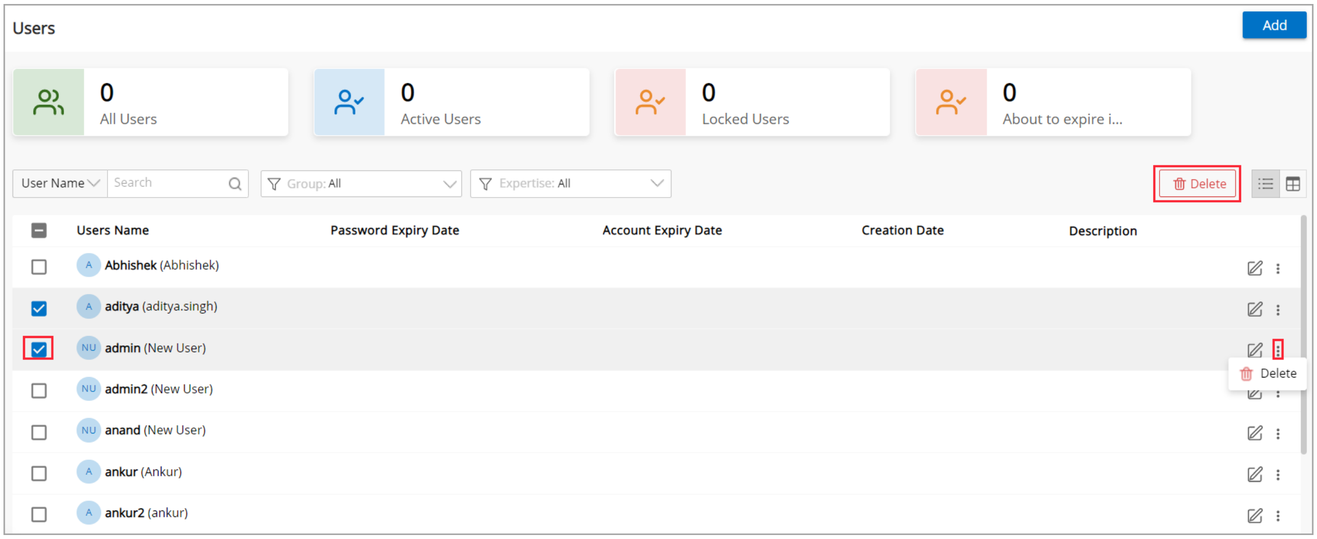


2. Click **Select All** to select all the privileges.
3. Click **Save**. The Privileges get modified.

Deleting a user

Perform the below steps to delete the user:

1. Go to the User. The User screen appears.



2. Select the checkbox given against the User Names.
3. Click **Delete** given in the upper-right to delete multiple groups.

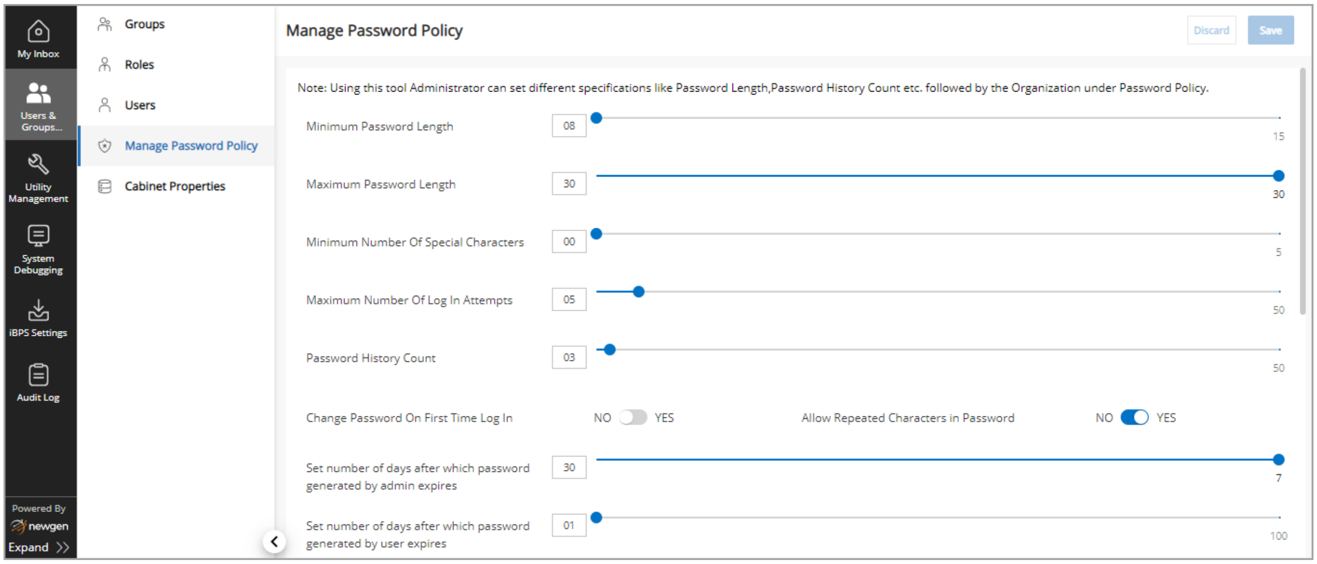
> You can also click the ellipsis icon ⋮ against the description column and then click **Delete** to delete a specific user.

Managing password policy

Manage Password Policy allows you to maintain the password policy as an administrator.

Perform the below steps to manage the password policy:

1. Go to the Users & Groups Management.
2. Click **Manage Password Policy**. The Manage Password Policy window appears.



3. Make the required changes from the following options:

Option	Description	Parameters
Minimum Password Length	Move the slider towards the left to minimize the password length.	• You can set the minimum number of characters for the password. • The user needs to enter a password equal to or greater than this length. • Admin members can set the password length only.
Minimum Number of Special Characters	Minimize the number of special characters in passwords using the dropdown .	• A minimum number of special characters that the user must use while entering the password is configurable. • Only admin members can perform this operation.
Maximum Number of Log In Attempts	Move the slider towards the right to maximize the log-in attempt.	• The number of attempts performed through the user for successful login is configurable. • Once the count reaches to last attempt user gets locked. • Only admin members can perform this operation.

Option	Description	Parameters
Password History Count	Move the slider towards the right to increase the password history count.	It is configurable that how many previous passwords users cannot use while setting the new password. • Only admin members can perform this operation.
Change Password On First Time Log In	Enable the change password on the first time log in.	• Upon enabling this feature, it is mandatory to change the password whenever the user logs in whether the password is system generated or admin generated. • A user is unable to login into OmniDocs unless a user changes his/her password.
Allow Repeated Characters in Password	Enable the allow repeated characters in the password.	It allows users to use the repeated characters in passwords.
No. of Days before Password expiry to warn	Move the slider towards the right to increase the days for password expiration.	It sets the number of days to give a warning to the user before the password expires. For example: On 1st September, a user is created, and the password expiry time is set for 30 days. Now if the value of the “No. of days before password expiry to warn” option is set as 5 days, the user starts getting an alert after 25th Sep that your password will expire in 5 days.
Enable Expiry Mail	Select this to enable expiry mail.	If the “enable expiry mail” checkbox is set as true, the user receives a mail after password expiry.
No. of Days after which User account expires if the User does not Log In to the system	Move the slider towards the right to specify the number of days after which the user account expires.	
Minimum Numeric Count	Move the slider towards the left to minimize the numeric count.	This set the minimum number of Numeric Case characters that must be present in the password.

Option	Description	Parameters
Minimum Lower Case Character Count	Move the slider towards the left to minimize the count of lower-case characters in the password.	This set the minimum number of Lower Case characters that must be present in the password.
Minimum Upper Case Character Count	Move the slider towards the right to minimize the count of upper-case characters in the password.	This set the minimum number of Upper case characters that must be present in the password.
Password Algorithm	Select the Password Algorithm.	
Save	Click Save to save the password policy details.	
Cancel	Click Cancel to close the manage password policy page.	

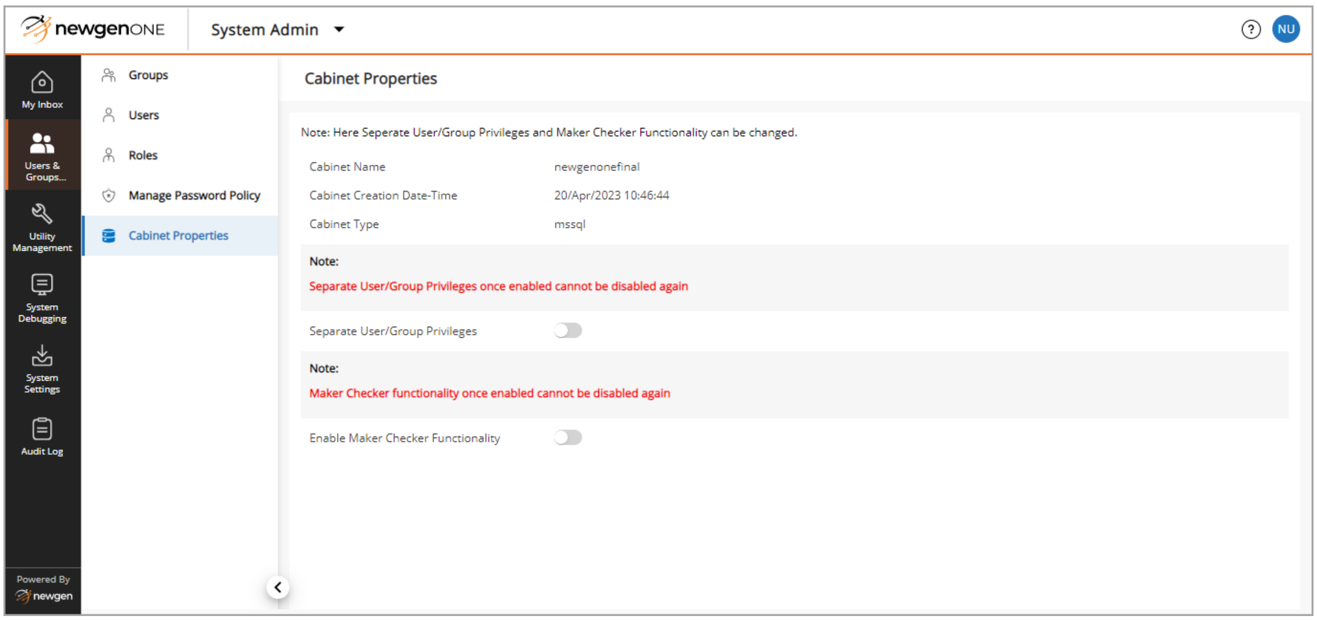
4. Click **Save**.

Managing cabinet properties

Cabinet Properties is used to view the details of the cabinet using which the user is logged in.

Perform the below steps to set cabinet properties:

1. Go to the Users & Groups Management.



2. Click **Cabinet Properties**. The Cabinet Properties window appears.
3. Select Separate User/Group Privileges to separate the privileges.
4. Select Enable Maker Checker Functionality to enable the maker checker.
5. Click **Save** to save the changes.

Managing utilities

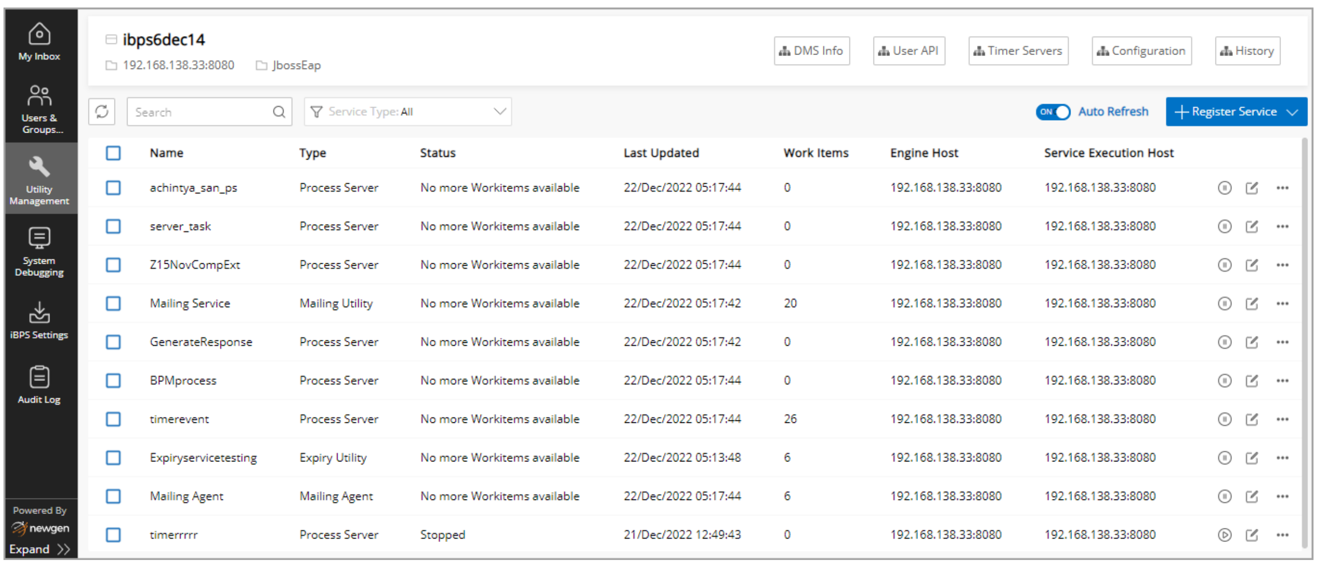
Utility Management is a monitoring system that monitors, and controls various services distributed over the whole system. It is a multi-threaded server that manages several services like print, fax-and-mail utility process servers, and so on. Administrators can register a new one and stop or start an existing service.

Using Utility Management, Businesses can view a list of registered services or register a new service.

For example, a system administrator can register a load balancer service and can assign the workitems evenly to active users having the access to work on that queue. This distribution of workitems results in faster processing.

Perform the below steps to access the Utility management:

1. Sign in to System Admin Workspace.
2. Click **Utility Management** on the navigation pane. The Utility Management window appears.



Utility Management contains the following options and operations:

Option	Description
Refresh	Click given in the left pane to refresh the processes.

Option	Description
Search Box	You can search the process with its name using the search box.
Service Type	You can select the service type using the service type filter given adjacent to the search box.
DMS Info	Click **DMS Info**. The DMS Info dialog appears. For more information, refer to the DMS info section.
User API	Click **User API**. The User API dialog appears. For more information, refer to the User API section.
Time Servers	Click **Time Servers** to edit the servers.
Configuration	Click **Configuration** to edit the processes configuration.
History	Click **History** to view the process history.
+Register Service	Click **+Register Service**. The Registered Service list appears. Click Service to edit the registered service.
Start	The start icon adjacent to service execution host displays the service is in start mode.
Stop	The stop adjacent to service execution host displays the service is in stop mode.
Edit	Click edit given in the right pane to edit the service details.
More Options	Click ellipses . The unregister option appears. Click Unregister to remove service from registered services.

Registering services

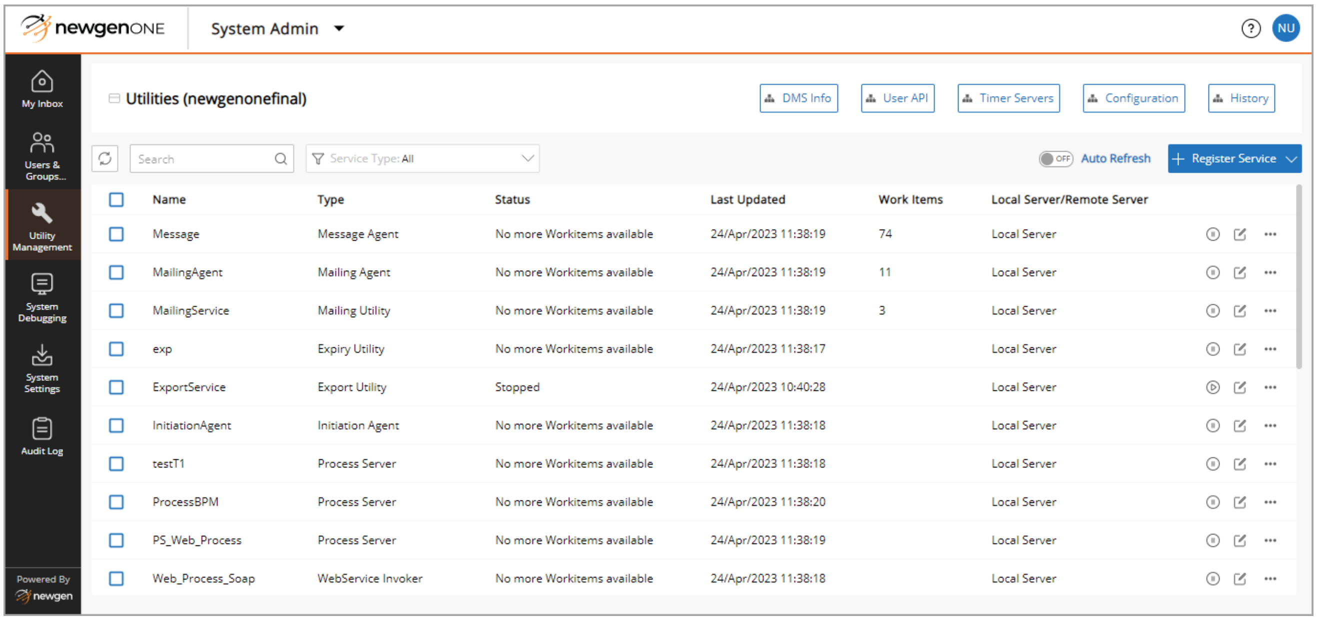
Registering a service enables the Service and notifies the service manager about its status. Upon receiving the notification, the service manager updates the status of the service or application.

The Service also notifies other details to the service manager such as the number of processed workitems, the number of unsuccessful attempts to fetch workitems from the Application Server, and so on depending on the monitoring status configured by the user.

For already registered applications, once the service manager starts, it intimates the Application Server. The services that are already connected to the Application Server, and are running, get this information from the Application Server, as well as update their respective status information to the service manager.

Perform the below steps to register a service:

1. Go to the Utility Management. The Utility Management page appears.



2. Click **+Register Service** and then select the required service from the following:

- Process Server
- Print, Fax and Email
- Import Service
- Mailing Service
- Load Balancer
- Expiry Service
- Archive Service
- Mailing Agent
- Message Agent
- JMS Publisher
- JMS Subscriber
- File Upload Service
- Reminder Utility
- SAP Invoker
- Export Purge
- Initiation Agent
- Audit Archive
- Business Rule Executor
- OMS Adapter Service
- Common Service
- Data Exchange Utility
- Custom Service (I)

- Web Service Invoker
- Export Service
- Custom Service (E)

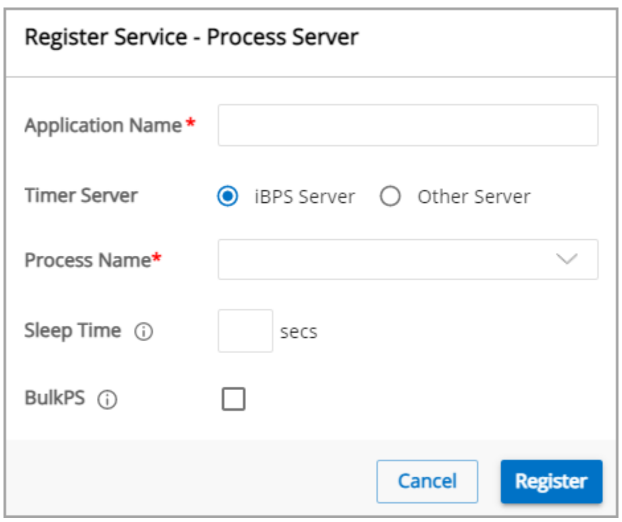
Process Server

The Process Server is responsible for routing the workitems to the next workstep in the Process. It also executes the Entry and Exit rules for the processing workitems. The Process Server works in both Asynchronous and Synchronous modes. In both modes, you need to create a dedicated user to generate a session Id for performing data management system (DMS) operations.

For Synchronous routing of workitems, you can create a dedicated user using the Set DMS Info menu option, which is discussed in Set DMS Info.

Perform the below steps to register Process Server:

1. Click **+Register Service**. The Dropdown menu appears.
2. Click **Process Server**. The *Register Service-Process Server* dialog appears.



3. Specify the following in the Process Server:

Field	Description
Application Name	Enter the Process Server Service name.

Field	Description
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown ﹀.
Select Server	Select the remote server from this dropdown list.
Process Name	This field contains a list of the processes stored in the selected cabinet. Select the Process Name using the ellipsis icon next to this field.
Sleep Time	Sleep Time is the duration in seconds after which service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.
BulkPS	It's a provision in Ofservices to register a new type of Process server. It processes workitems dedicatedly only on those Activities having greater count than the Threshold value. Select the BulkPS checkbox to enable BulkPS.

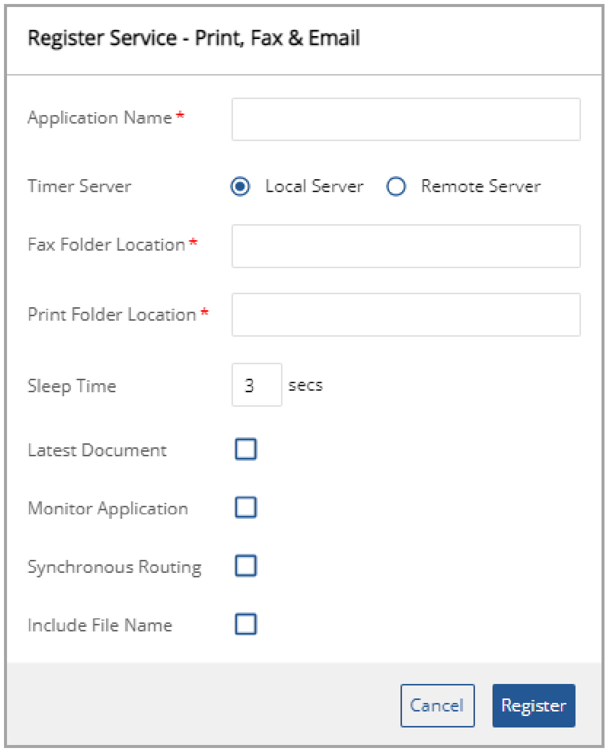
4. Click **Register**.

Print, Fax & Email

Print, Fax and Email Service allows you to mail, print and fax at the specified workstep within the defined process. In a particular process there can be workstep, which is defined as the Print, Fax & Email type. On this workstep, the workitems are processed for printing, fax or e-mailing the data as well as the associated documents before routing them on the next workstep. For initiating this task, Print, Fax & Email Service must be registered for that Process.

Perform the below steps to register Print, Fax & Email Service:

1. Click **+Register Service**. The Dropdown menu appears.
2. Click **Print, Fax & Email**. The Register Service-Print, Fax & Email dialog appears.



3. Specify the following information:

Field	Description
Application Name	Enter the Name of the Print, Fax & Email Service.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown .
Select Server	Select the remote server from this dropdown list.
Fax Folder Location	Enter the location of the fax folder. For more information, refer to the Fax Folder section.
Print Folder Location	Enter the location of the print folder.
Sleep Time	Sleep Time is the duration in seconds after which service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.
Latest Document	Select the Latest Document if you want to generate response details on latest document.

Field	Description
Monitor Application	Select the Monitor Application checkbox to allow application monitoring.
Synchronous Routing	Select the Synchronous routing mode checkbox to enable synchronous routing of workitems. For more information, refer to the Synchronous Routing section.
Include File Name	Select the Include File Name checkbox if required.

4. Click **Register**.

Fax Folder Location

Upon configuration of Fax documents for any workstep, the fax server is required on the system to run print, fax, and email service. The Fax gets configured to poll a particular directory, and as soon as it obtains the document in that directory, it processes them for fax. In the case of fax, this Service puts the documents in the directory that is polled by the Fax Server. Specify the fax folder location where the documents must be placed by the Print, Fax, and E-mail Service to be later processed by the integrated fax server. Under the specified location, the documents to be faxed are stored in a sub-folder named '<ProcessDefId>_<ProcessInstanceId>_<ActivityId>', where ProcessDefId is the id of the process in which the document is contained, ProcessInstanceId is the name of the workitem which contains the document, and activity id is the id of the print/fax/email workstep at which the document was marked to be faxed. The folder is generated at run-time at the specified location. The sub-folder also contains a file called 'fax.ini'. It contains entries of the fax number and all the document names to be faxed.

Synchronous Routing

The checkbox added as “Synchronous Routing” for the utilities enables its process server to run in synchronous mode, irrespective of whether the process server is set to run in synchronous or asynchronous mode.

There can be 4 scenarios:

- Server-Synchronous Utility: “Synchronous Routing”-Not checked
  In this scenario the utility-PS will run in synchronous mode since the server is synchronous.
- Server-Asynchronous Utility: “Synchronous Routing”-Not checked
  In this scenario the utility-PS will run in asynchronous mode since neither the server nor the utility is running in synchronous mode
- Server-Synchronous Utility: “Synchronous Routing”- Checked
  In this scenario the utility-PS will run in synchronous mode since both the server as well as Utility is running in synchronous.
- Server-Asynchronous Utility: “Synchronous Routing”-Checked
  In this scenario the utility-PS will run in synchronous mode since utility is running in synchronous mode.

If either server or the Utility is synchronous then for that utility processing server will be synchronous.

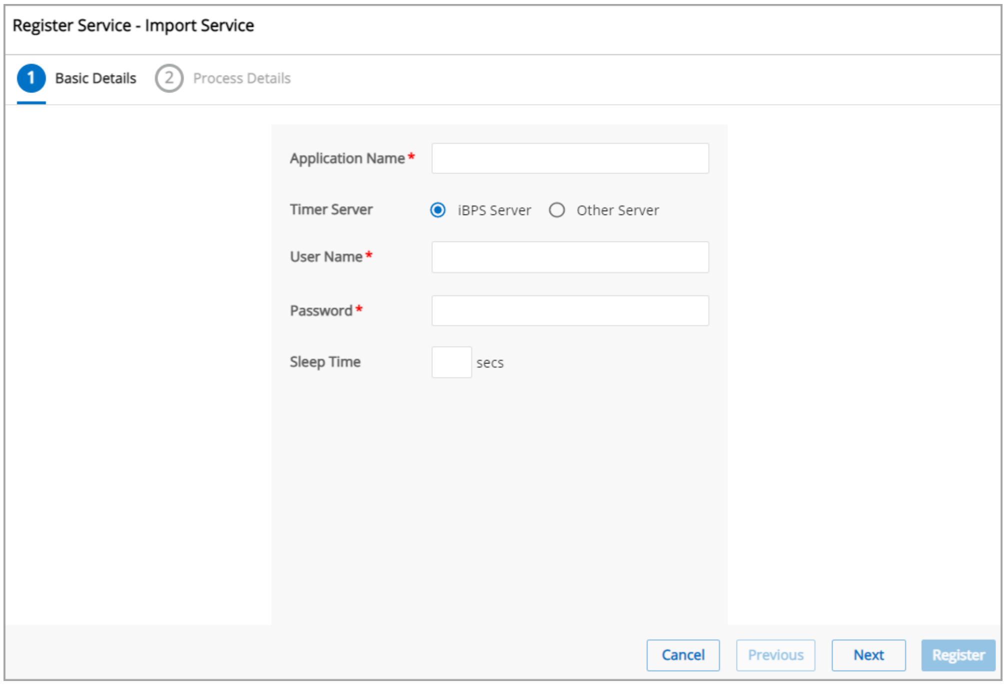
All the above statements are true for all Utilities with “Synchronous Routing” checkbox.

Import Service

This service is used when there is a need to add data from an external application. This service either sets Data in workitem or Initiate workitem in process.

Perform the below steps to register Import Service:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **Import Service**. The Register Service-Import Service dialog appears.



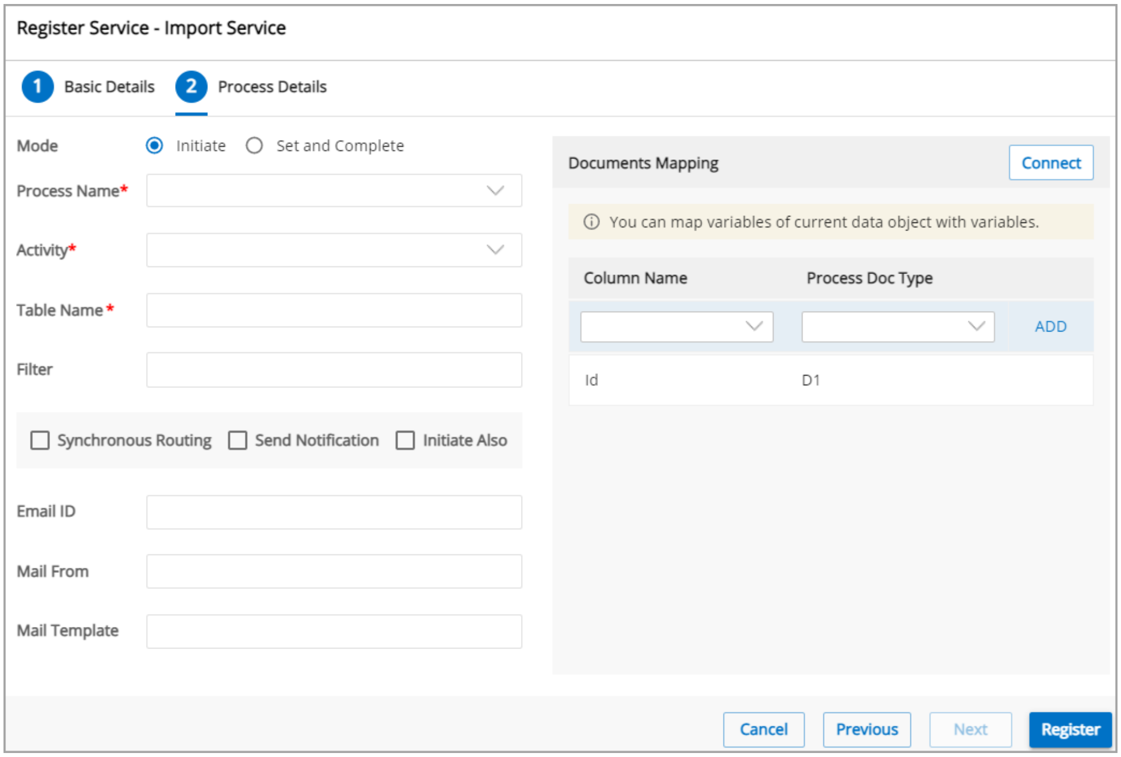
3. Specify the following information on the Basic Details tab:

Field	Description
Application Name	Enter the Process Server Service name.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown .
Select Server	Select the remote server from this dropdown list.
Sleep Time	Sleep Time is the duration in seconds after which the service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.

4. Click **Next**. The Process Details tab appears.
5. Specify the following Process Details in Import Service:

Field	Description
Mode	Select the any of the following Mode: • Initiate • Set and Complete
Process Name	Select the process name using the ellipsis icon.
Activity	Select the activity using the dropdown.

Field	Description
Table Name	Enter the name of the table.
Filter	Enter the filter that you want to register in import service.
Synchronous Routing	Select the Synchronous Routing checkbox to select routing.
Send Notifications	Select the Send Notifications checkbox to send service notifications.
Initiate Also	Select the Initiate Also checkbox to initiate the workitems.
Email ID	Enter the Email ID of the User to whom you want to deliver the notification on completion of Import Service operation.
Mail From	Enter the sender's Email ID that receives notification mail on completion of Import Service operation.
Mail Template	Specify the template to send notification mails on completion of Import Service operation.
Document Mapping	Specify the following to map the document: • Select the Column Name using the dropdown. • Select the Process Doc Type using the dropdown. • Click Add to add the current object data. • Click Connect to map documents.
Set and Complete	Upon selecting the Set and Complete Mode, specify the following: • iBPS File Attribute: Specify the iBPS File Attribute to add a filter on the file name in the Set and Complete operation. • Replace: Enter the Replace Value to generate Filter String to With field. • With: Enter the With Value to substitute the With Value with Replace. • Leave If Blank: Select to leave the blank field as it is. • Suppress If Blank: Select to suppress blank fields. • Search Column: Select the Search Column using the dropdown and click Add.



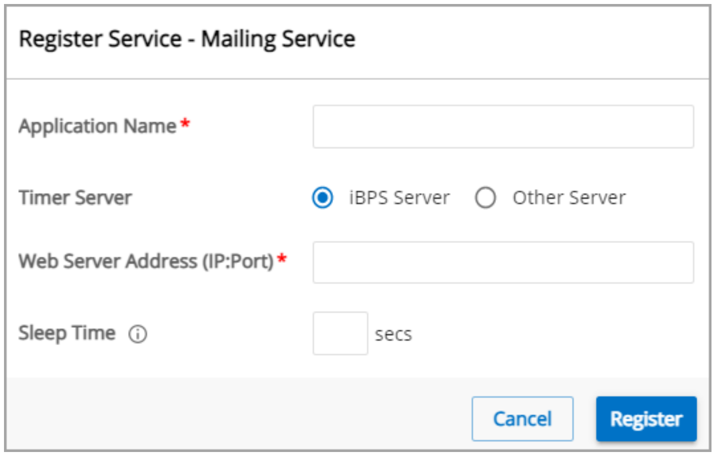
6. Click **Register**.

Mailing Service

The Mailing Service allows you to send notification e-mails. For example, an e-mail can be automatically sent to the user if a report gets blocked in BAM or if a workitem is re-assigned to a user.

Perform the below steps to register for Mailing Service:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **Mailing Service**. The Register Service-Mailing Service dialog appears.



3. Specify the following information:

Field	Description
Application Name	Enter the Mailing Service name.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown .
Select Server	Select the remote server from this dropdown list.
Web Server Address (IP: Port)	Specify the Web Server IP address and its Port in the Web Server IP Address textbox. Enter the IP and Port in the format like IP:Port.
Sleep Time	Sleep Time is the duration in seconds after which the service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.

4. Click **Register**.

Load Balancer

Load Balancer service polls the application server and depending upon the load on the Dynamic Queue, the workitems are assigned to the active users in that Queue.

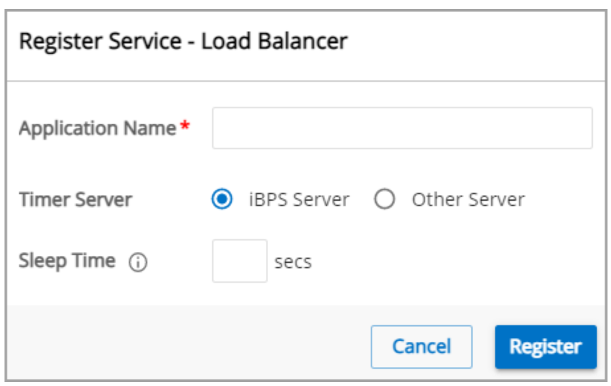
Suppose in a bank, a process is defined for loan approval. This process consists of the following worksteps- Introduction, where the applications are received from the customers; Data Entry, where the data is entered in the process and the documents are scanned; Verify, where the application is verified according to the data and the documents received from the client; and Final Approval for deciding whether to sanction the loan.

Suppose, on the 'Data Entry', it was found that the load is more, so there should be more people assigned in the Queue, which is currently operating on that workstep. Now, a mechanism is required to distribute the application forms (workitems) evenly among all the users assigned to that queue for faster processing.

That's where the Load Balancer comes into use. It assigns the workitems evenly among the members of the Dynamic Queue.

Perform the below steps to register Load Balancer:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **Load Balancer**. The Register Service-Load Balancer dialog appears.



3. Specify the following information:

Field	Description
Application Name	Enter the Load Balancer Service name.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown .
Select Server	Select the remote server from this dropdown list.

Field	Description
Sleep Time	Sleep Time is the duration in seconds after which the service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.

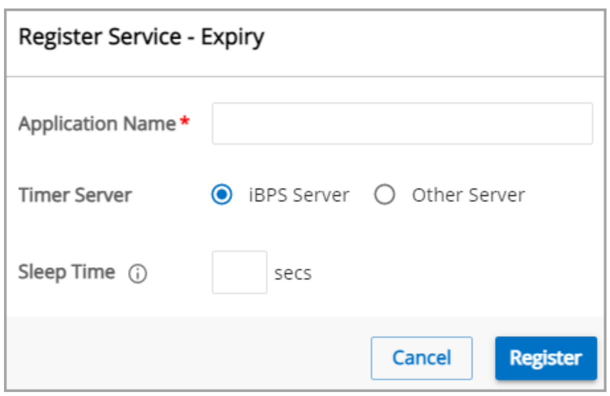
4. Click **Register**.

Expiry Service

When a workitem is not processed after a specified time period, this service is used to route the workitem to the destination workstep.

Perform the below steps to register Expiry Service:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **Expiry Service**. The Register Service-Expiry dialog appears.



3. Specify the following information:

Field	Description
Application Name	Enter the Expiry Service name.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown .
Select Server	Select the remote server from this dropdown list.

Field	Description
Sleep Time	Sleep Time is the duration in seconds after which service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.

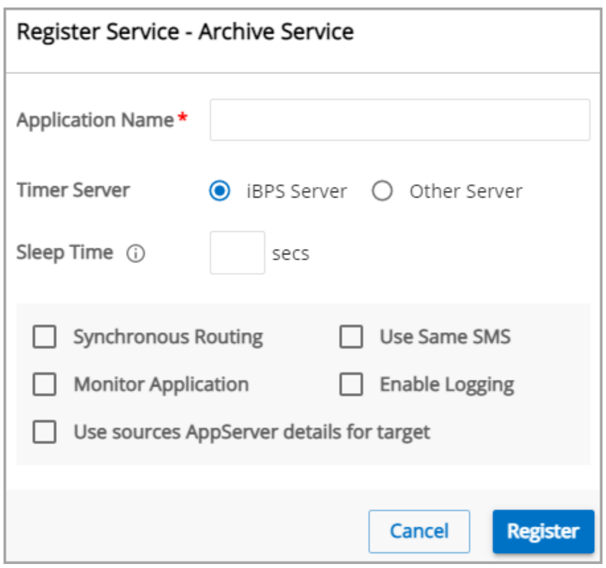
4. Click **Register**.

Archive Service

Archive Service allows archiving of workitems, associated data, and documents in a specified cabinet.

Perform the below steps to register Archive Service:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **Archive Service**. The Register Service-Archive Service dialog appears.



3. Specify the following information:

Field	Description
Application Name	Enter the Archive Service name.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown .

Field	Description
Select Server	Select the remote server from this dropdown list.
Sleep Time	Sleep Time is the duration in seconds after which service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.
Synchronous Routing	Select to enable synchronous routing of workitems.
Use Same SMS	Select to use the same SMS.
Monitor Application	Select to enable application monitoring.
Enable Logging	Select to enable logging.
Use sources AppServer details for target	Select to use the appserver details of the source for the target. This checkbox is selected by default. Deselect this option to specify the target DMS information. Deselecting this enables the DMS Info fields.
AppServer IP	Enter the IP of the target application server.
AppServer Port	Enter the port of the target application server.
AppServer Type	Select the type of the target application server from this dropdown list.
Connect	Click to connect to the target server.
Cabinet Details	This dropdown list displays the available cabinets on the connected server. Select a cabinet as target from this dropdown list.
User Name	Enter a username to access the target cabinet.
User Password	Enter the password for the selected user.
Add	Click to add the target cabinet.
Clear	Click to discard the entered cabinet details.

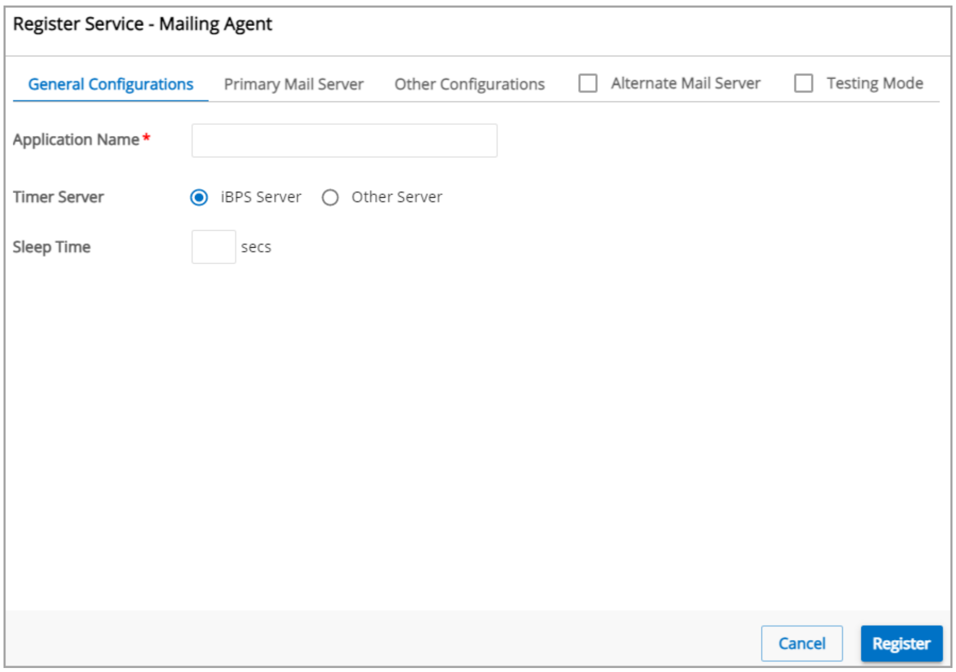
4. Click **Register**.

Mailing Agent

This service is responsible for sending e-mails, whose entries have been created in the mail queue table.

Perform the below steps to register Mailing Agent:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **Mailing Agent**. The Register Service-Mailing Agent dialog appears.



3. Specify the following information:

Tab	Description
General Configuration	Specify the following details in the General Configuration: • Application Name: Enter the Mailing Agent Service name. • Time Server: You can select any of the following server: ◦ Local Server: Select to use the time of the local server. ◦ Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown . • Select Server: Select the remote server from this dropdown list. • Sleep Time: Sleep Time is the duration in seconds after which service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.

Tab	Description
Primary Mail Server	Specify the following details in the Primary Mail Server: • Mail Protocol: Select the MTP Protocol using the dropdown. • Upon selection of MAPI, Enter the following: ◦ Profile Name: Enter the profile name for the primary mail server. ◦ SMTP Server: Specify the IP address of the mail server which is used to send the mails. ◦ SMTP Port: Enter the mentioned SMTP Server in the SMTP Port. ◦ Security Mode: Select the Security Mode using the dropdown. ◦ Email ID: Enter the Email ID to send the emails. ◦ Authentication Required: Select the Authentication Required checkbox to enable authentication. ◦ SMTP Account Name: Upon enabling authentication required, Specify the SMTP Account Name. ◦ SMTP Password: Enter the SMTP Password.
Other Configurations	Specify the following details in the Other Configurations: • Reconnection Time: Specify the Reconnection Time in seconds. • Connection Timeout: Specify the Connection Timeout in seconds. • No Response Timeout: Specify the No Response Timeout in seconds. • Wait Before Retry Time: Specify the Wait Before Retry Time in seconds. • No of Trials: Specify the No of Trials in seconds. • Set Return Path: Select the Set Return Path checkbox. • Read Receipt: Select the Read Receipt checkbox to allow the system to send an acknowledgment mail to the recipient. • Mail Filter: Select the Field using the dropdown in the Mail Filter.

<table>
<tr><th>Tab</th><th>Description</th></tr>
<tr><td>Alternate Mail Server</td><td>To specify the details in Alternate Mail Server, select the checkbox given adjacent to the Alternate Mail Server.
Specify the following details in the Alternate Mail Server:
Mail Protocol: Select the MTP Protocol using the dropdown.
Upon selection of MAPI, Enter the Profile Name.
SMTP Server: Specify the IP address of the mail server which is used to send the mails.
SMTP Port: Enter the mentioned SMTP Server in the SMTP Port.
Security Mode: Select the Security Mode using the dropdown.
Email ID: Enter the Email ID to send the emails.
Authentication Required: Select the Authentication Required checkbox to enable authentication.
SMTP Account Name: Upon enabling authentication required, Specify the SMTP Account Name.
SMTP Password: Enter the SMTP Password.
For more information, refer to the Alternate mail server section.</td></tr>
<tr><td>Testing Mode</td><td>To specify the details in Testing Mode, select the checkbox given adjacent to the Testing Mode.
Specify the following details in the Testing Mode:
Test Email To: Enter an email ID to send a test mail.
Test Email From: Enter an email ID to use for sending a test mail.
Test Email Cc: Enter an email ID in the Cc list to send a test mail.
Test Email Bcc: Enter an email ID in the Bcc list to send a test mail.
Test Email Subject: Enter the Test email Subject.
Test Email Message: Enter the Test email message.
For more information, refer to the Testing Mode section.</td></tr>
</table>

4. Click **Register**.

Alternate mail server

Alternate mail server allows you to configure an alternate mail server for uninterrupted email sending feature. Here, you can configure the alternate mail server in case the actual mail server configured in the mailing agent is not available to send the emails then this alternate mail server sends the emails. When the main mail server is not able to send an email and the mailing agent tried up to the specified number of times, then it automatically switches to the alternate mail server and uses the alternate mail server to send the email.

Testing mode

Testing Mode allows you to avoid sending emails to actual users in UAT or SIT environments. If a developer wants to test the mailing agent feature, he can register the mailing agent in testing mode and provide the testing mail IDs for testing purposes. In this way, the mail agent reads the mail information from WFMailQUeueTable and replaces the actual mail IDs with the testing email IDs and sends emails to testing email IDs.

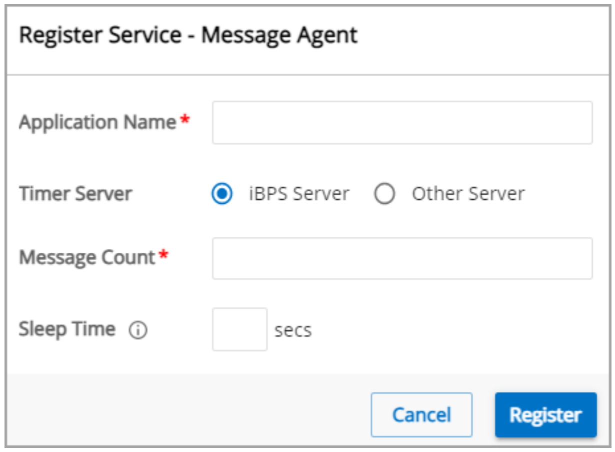
Message Agent

Message Agent is a Service used for generating reports for all completed operations. The generated messages, corresponding to different operations, are added to a common queue. From this common queue, Message Agent first locks a particular number of messages and then processes all locked messages one by one. The number of messages to be locked by the Message Agent must be specified by the administrator. The optimum value is 50 but it can be changed accordingly.

For all reports generation, only one Message Agent is sufficient to be registered, though more than one Message Agent can also be registered for the same cabinet.

Perform the below steps to register Message Agent:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **Message Agent**. The Register Service-Message Agent dialog appears.



3. Specify the following information:

Field	Description
Application Name	Enter the Message Agent name.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown .
Select Server	Select the remote server from this dropdown list.
Message Count	Specify the No of Messages you want to lock through the Message Agent. The optimal value is 50 but you can change it accordingly.
Sleep Time	Sleep Time is the duration in seconds after which the service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.

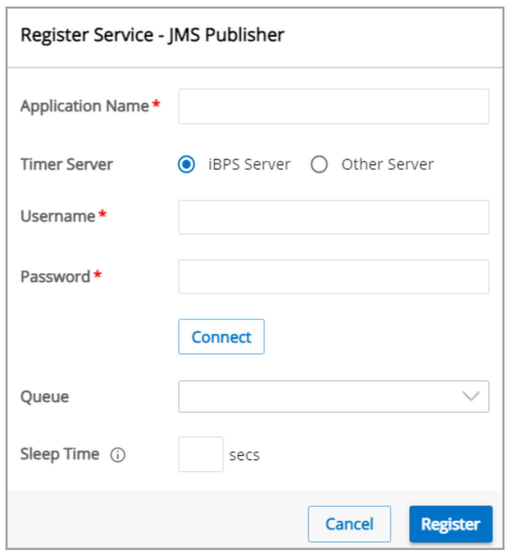
4. Click **Register**.

JMS Publisher

This service works in the concept of Java Message Service. It publishes the messages into a queue, created on the Application Server.

Perform the below steps to register JMS Publisher:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **JMS Publisher**. The Register Service-JMS Publisher dialog appears.



3. Specify the following information:

Field	Description
Application Name	Enter the JMS Publisher name.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown.
Select Server	Select the remote server from this dropdown list.
User Name	Specify the User name of the JMS Publisher.
Password	Specify the Password.
Connect	Click Connect. The Application gets connected.

Field	Description
Queue	Select the Queue using the dropdown ﹀.
Sleep Time	Sleep Time is the duration in seconds after which service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.

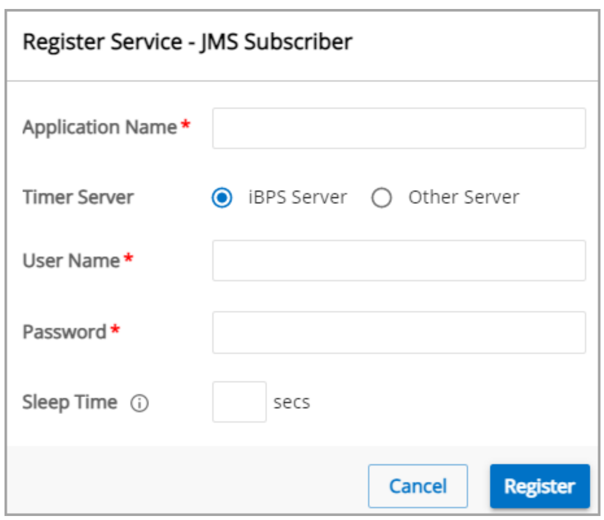
4. Click **Register**.

JMS Subscriber

This service allows you to retrieve messages from Queue from an Application Server.

Perform the below steps to register JMS Subscriber:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **JMS Subscriber**. The Register Service-JMS Subscriber dialog appears.



3. Specify the following information:

Field	Description
Application Name	Enter the JMS Subscriber name.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown ﹀.

Field	Description
Select Server	Select the remote server from this dropdown list.
User Name	Specify the User name of the JMS Subscriber.
Password	Specify the Password.
Sleep Time	Sleep Time is the duration in seconds after which the service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.

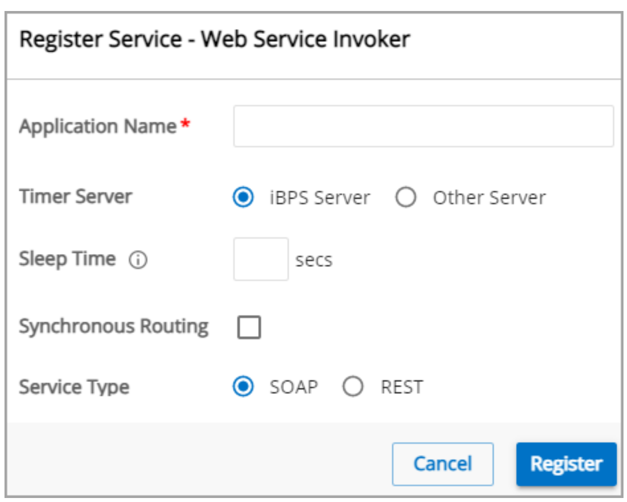
4. Click **Register**.

Web Service Invoker

This service enables the invocation of a remote web method of a web service.

Perform the below steps to register Web Service Invoker:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **Web Service Invoker**. The Register Service-Web Service Invoker dialog appears.



3. Specify the following information:

Field	Description
Application Name	Enter the Web Service Invoker name.

Field	Description
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown ﹀.
Select Server	Select the remote server from this dropdown list.
Sleep Time	Sleep Time is the duration in seconds after which the service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.
Synchronous Routing	Select the Synchronous Routing checkbox to enable synchronous routing of workitems.
Service Type	Select any of the following Service Type: • SOAP • REST

4. Click **Register**.

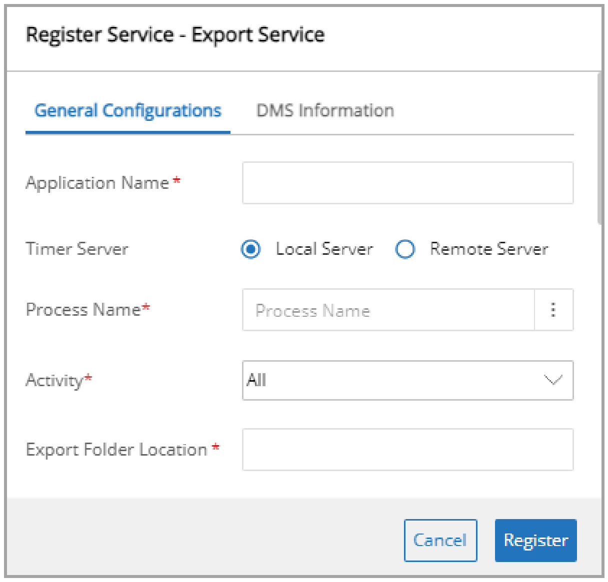
Export Service

Export Service allows you to generate a CSV file from Process or Workitem Data. The type of the CSV file can be fixed-length or comma-separated. In the case of fixed length, the length of each field is specified at the time of writing data into the file. In the case of a comma-separated file, the field separator configured by the Service Manager is considered.

The default field separator is a comma.

Perform the below steps to register Export Service:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **Export Service**. The Register Service-Export Service dialog appears.



3. Specify the following information:

Field	Description
General Configurations	
Application Name	Enter the Export Service name.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown .
Select Server	Select the remote server from this dropdown list.
Process Name	It contains the list of the processes stored in the selected cabinet. Click the dropdown to select the Process Name.
Activity	The corresponding activities of the selected process get populated in the Activity dropdown. Select the activity using the dropdown on which the Export feature gets implemented from Activity combo-box.
Export Folder Location	Enter the location where you want to save the CSV file in the Export Folder Location.
Field Separator	Enter the Field Separator to separate table columns in the CSV file.
Masked Value	Masked Value allows you to hide a column of the exported table while exporting workitem's data. You can specify the column name in the Masked Value field for which you want to hide the data.

Field	Description
Filter	Filter condition generates the CSV file containing data according to the specified filter condition. For Example: If you want to generate the CSV file containing data of only those employees whose age is more than 25 and monthly income is more than 20,000 then you can specify the filter as, “age>25 and income>2000” (without quotes) [‘age’ and ‘income’ are the predefined column names defined in Process Designer].
Date Format	Select the date format using the format.
Header String	Enter the header string.
Footer String	Enter the footer string.
Record Size	Enter the Record Size.
Record Date Format	Enter the Record Date Format as required.
Sleep Time	Sleep Time is the duration in seconds after which the service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.
File Type	Select the File Type using the dropdown. It contains different file formats.
DMS Information	
Add in DMS	Select the checkbox if required.
DMS Folder Location	Select the DMS Location where you want to store the file.
Trailing String	Enter the Trailing string. It gets appended at the end of the file.
Padding Count	Specify the number of digits in the sequence number field of the file name.
File Move	Specify the duration of moving the generated CSV or other files to the destination on a Daily, Weekly, or Monthly basis.
Export Time	Specify the Export Time after which the file gets exported to the destination.

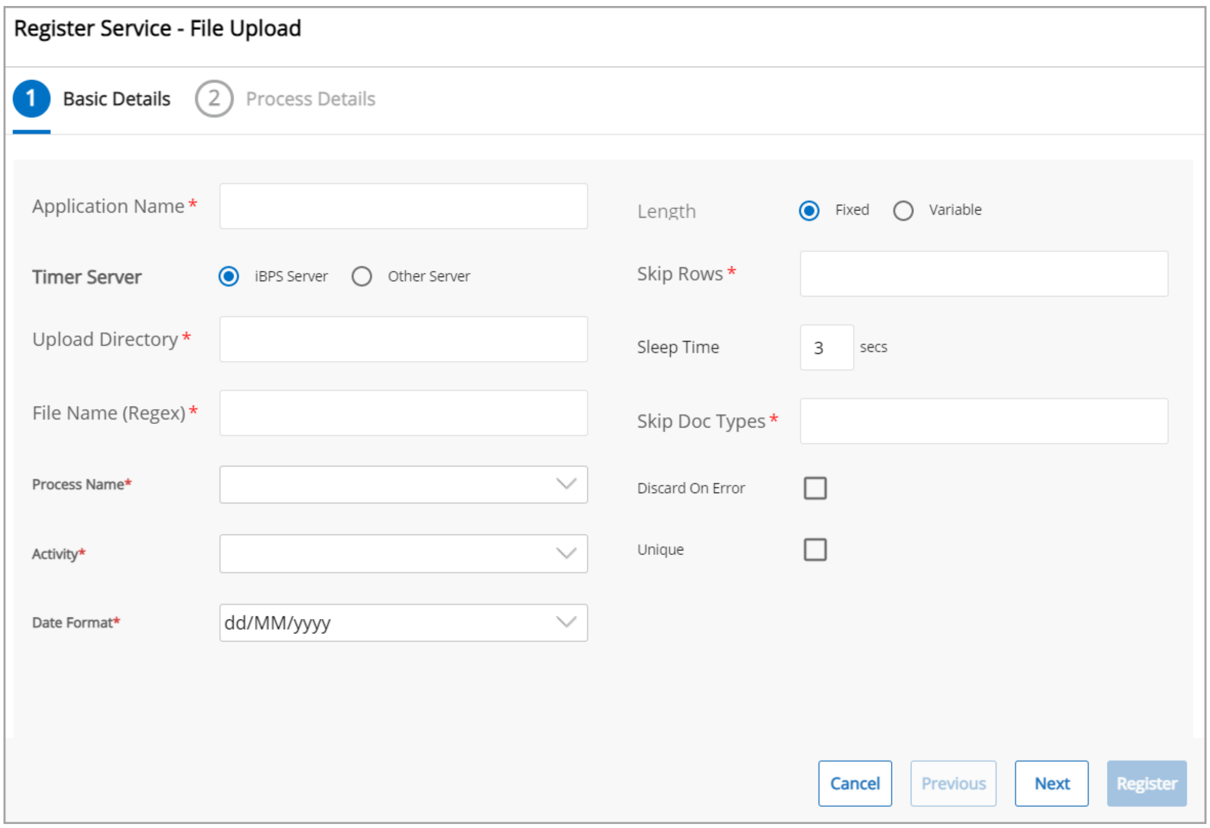
4. Click **Register**.

File Upload Service

This service allows you to upload records from files into NewgenONE System.

Perform the below steps to register File Upload Service:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **File Upload Service**. The Register Service-File Upload Service dialog appears.



3. Specify the following information:

Field	Description
Basic Details	
Application Name	Enter the File Upload Service name.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown .
Select Server	Select the remote server from this dropdown list.

Field	Description
Upload Directory	Enter the Upload Directory. It shows the location of the files where you need to upload the documents.
File Name (Regex)	The name of the file that is located at the upload directory.
Activity	The corresponding activities of the selected process get populated in the Activity dropdown. Select the activity using the dropdown on which the Export feature gets implemented from the Activity combo-box.
Date Format	Select the Date Format using the dropdown. The selected date format gets applied in the files.
Length	The following are the types of length: • Fixed: It allows you to define a fixed length for the file columns while registering File Upload Service. If the user selects the radio button adjacent to Fixed in the Length field, a new field called “Field Length” displays. You can define the length of each column or field. For example: Suppose a CSV file having two columns that is Name and Age. These columns are defined as shown below: ◦ NameAge ◦ ABC11 ◦ XYZ22 Now you can define the length of these 2 columns or fields as 3 and 2 respectively and skips the Row 1. It means system pick values from second row, then it pick first three characters for field1 and 2 characters for Field2 ahead of field1. Means Field1 =ABC or XYZ and Field2 =11/22 If Defined lengths are 4 and 1, then Field1 =ABC1/XYZ2 and Field2 = 1/2. • Variable: It allows you to define variable length for the file columns while registering File Upload Service. If you select Variable, a new field called Separator displays. You can define a separator like ‘,’ (comma). For example: Suppose a CSV file having two columns namely Name and Age. These columns are defined as shown below: ◦ Name,Age ◦ ABC,11 ◦ XYZPQR, 222 Now you define a separator ‘,’ and skips the Row 1.

Field	Description
	It means system pick values from the second row, then pick all characters before ‘,’ for field1 and all characters after separator’,’ for Field2. Means Field1 =ABC/XYZPQR & Field2 =11/222.
Skip Rows	Specify the Rows you want to skip from the top.
Sleep Time	Sleep Time is the duration in seconds after which service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.
Skip Doc Types	Enter doc types to skip.
Discard On Error	Select the checkbox to enable discard on error. It implies that in case an error occurs in a record of a file, the entire file gets discarded.
Unique	Select the checkbox to specify the uniqueness of the file name.
Process Details	
Table Name	Enter the required table name.
No. of fields	Enter the number of required fields.
Column Header	Select the column header type and click Connect
Field	Select the required field from this dropdown list.
Variable	Select the required variable from this dropdown list.
Field Length	Mention the field length and then click ADD.

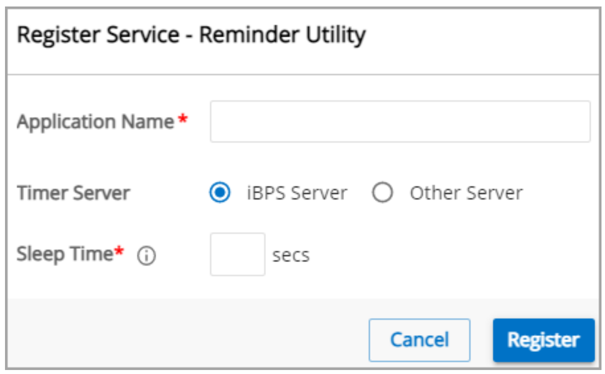
4. Click **Register**.

Reminder Utility

Reminder Utility allows you to send reminders at predefined intervals as defined in the Timer Activity or Event properties. It is required to register when you have a Timer Activity or Event in any of the processes. It is a generic service for the entire cabinet.

Perform the below steps to register Reminder Utility:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **Reminder Utility**. The Register Service-Reminder Utility dialog appears.



3. Specify the following information:

Field	Description
Application Name	Enter the Reminder Utility Service name.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown .
Select Server	Select the remote server from this dropdown list.
Sleep Time	Sleep Time is the duration in seconds after which the service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.

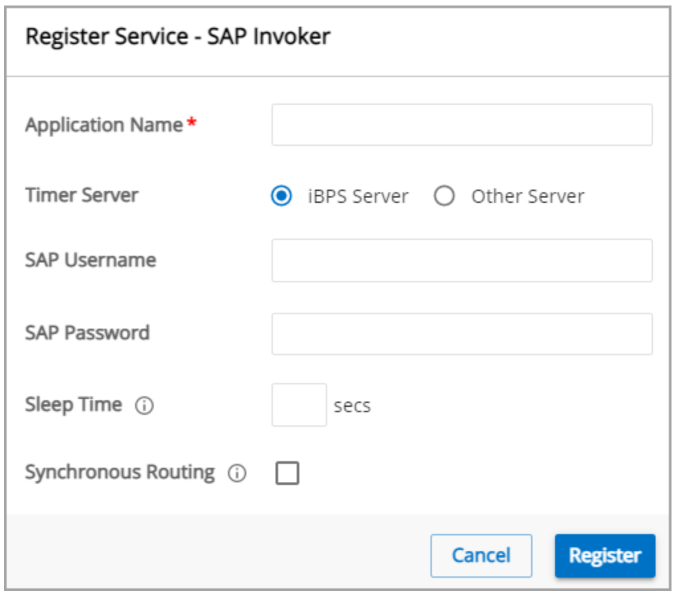
4. Click **Register**.

SAP Invoker

This service allows you to invoke SAP function modules.

Perform the below steps to register SAP Invoker:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **SAP Invoker**. The Register Service-SAP Invoker dialog appears.



3. Specify the following information:

Field	Description
Application Name	Enter the SAP Invoker Service name.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown .
Select Server	Select the remote server from this dropdown list.
SAP User Name	Specify the User name of the SAP System.
SAP Password	Specify the Password of the SAP System.

Field	Description
Sleep Time	Sleep Time is the duration in seconds after which service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.
Synchronous Routing	Select the Synchronous Routing checkbox to enable synchronous routing of workitems.

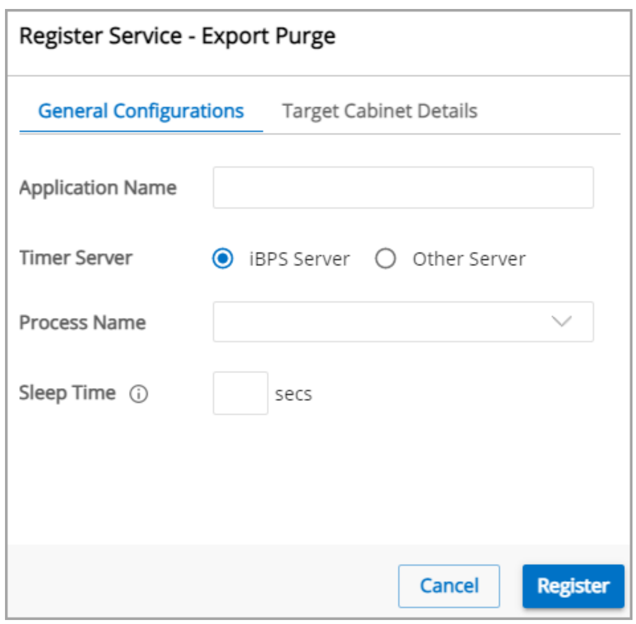
4. Click **Register**.

Export Purge

Export Purge is an NewgenONE system service that allows the Process owner to Export and Purge old transnational and document data.

Perform the below steps to register Export Purge:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **Export Purge**. The Register Service-Export Purge dialog appears.



3. Specify the following information:

Tab	Description
General Configurations	Specify the following in the General Configurations: • Application Name: Enter the General Configuration name. • Timer Server: You can select any of the following server: ◦ Local Server: Select to use the time of the local server. ◦ Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown . • Select Server: Select the remote server from this dropdown list. • Process Name: Select the Process Name using the dropdown. • Sleep Time: Sleep Time is the duration in seconds after which the service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.
Target Cabinet Details	Specify the following in the Target Cabinet Details: • Cabinet Name: Enter the Target Cabinet name. Fresh cabinet refers as a Target Cabinet, there must be no other registered process in the Target Cabinet. • WFS IP Address: Enter WorkFlow Sever IP of the Target Cabinet. • WFS Port: Enter WorkFlowServer Port of the Target Cabinet. • Username: Enter a User Name to assign Utility Registration and allowing to perform DMS Operation. The user must be a member of a Supervisor Group. • Password: Enter a Password for Target Cabinet.

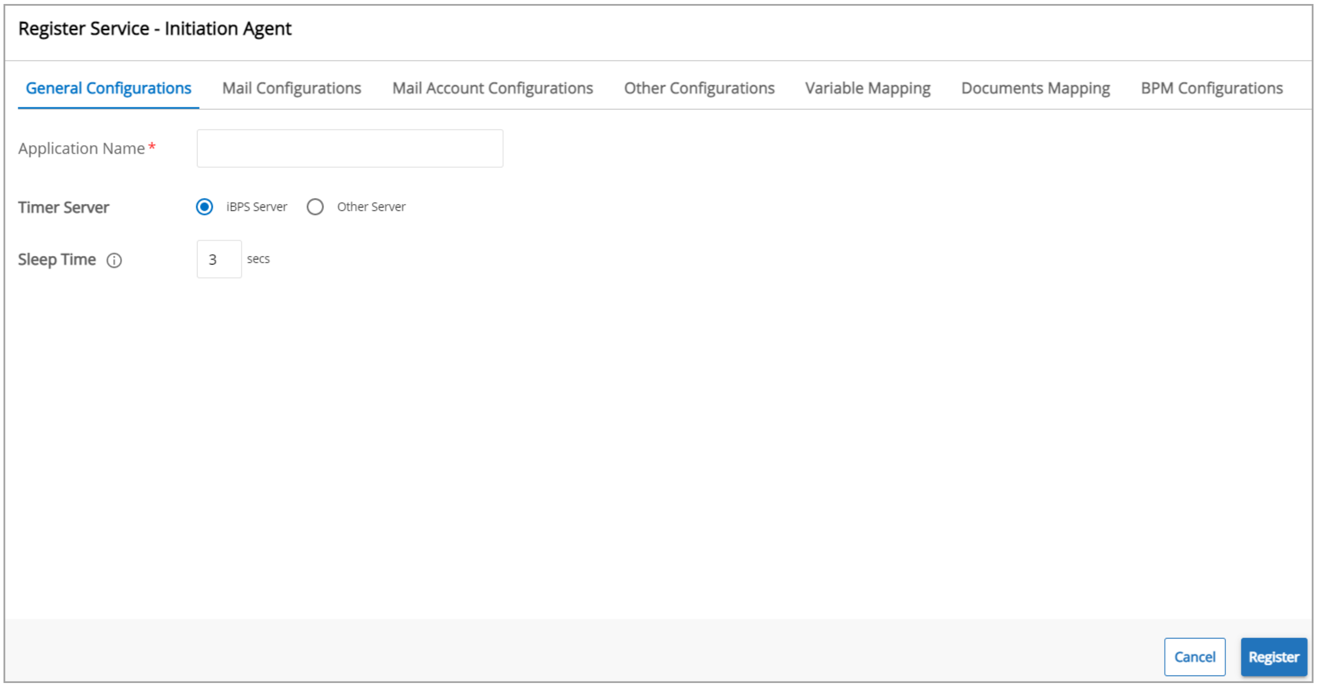
4. Click **Register**.

Initiation Agent

This service fetches emails from the Mail Server and creates corresponding workitems in the registered process. You can also map the message's attachment to the Process document.

Perform the below steps to register the Initiation Agent:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **Initiation Agent**. The Register Service-Initiation Agent dialog appears.



3. Specify the following information:

Tab	Description
General Configurations	
Application Name	Enter the Initiation Agent Service name.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown .
Select Server	Select the remote server from this dropdown list.
Sleep Time	Sleep Time is the duration in seconds after which the service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.
Mail Configurations	
Mail Protocol	Select the Mail Protocol using the dropdown. This lists the different Email related protocols such as SMTP, POP, and so on.
Import Path	Specify the Import Path. It's the path where the fetched emails are stored temporarily.

Tab	Description
Destination Folder	Specify the destination folder. After the successful processing, the document is stored in the specified folder. Else, it is stored in the Failure folder.
Connection Timeout	Enter the timeout value in seconds.
Download Emails	Select the All or Unread emails to download.
Security Mode	Select the Security Mode using the dropdown.
Source Folder	Select the Source Folder using the dropdown.
Message Status	Select the Message Status using the dropdown. The following option appears: • Move: It indicates that after processing, emails move to the destination folder. • Delete: It indicates that after processing, emails get deleted.
Failure Notification Email id	Enter an email id to notify in case of a failure.
Mail Account Configurations	
Host	Enter the Mail Server IP Address.
Email ID	Enter your Email ID.
Account Name	Enter the Email Account Name.
Password	Enter the Account Password.
ADD	Click ADD. The Mail Account Configuration gets added.
Other Configurations	
Debug Mode	Select the Debug Mode checkbox to enable debugging.
Generate Email Report	Select the Generate Email Report checkbox to enable email report generation.
Attach Email (eml) In Workitem	Select to attach the email to the created workitem.
Append Header In Mail Body Document	Select to append the header in the mail body.

Tab	Description
Variable Mapping	
Process Name	Enter the Process Name. This field contains the list of the processes stored in the selected cabinet. Select the Process that avails the Initiation Agent Service.
Mail Header Variable	Select the following Mail Header Variables using the corresponding Process Variable dropdown. • To • CC • From • Subject • Date • Priority
Documents Mapping	
Attachment Mandatory	Select to make an attachment mandatory.
Default Doc type for Attachments	Select the default doc type for the attachment.
Mail Attachment type	Enter the mail attachment type.
ADD	Click ADD to save the settings.
BPM Configurations	
Introduction Activity	Select the required introduction activity from this dropdown list.
Create Multiple Workitems	Select to create multiple workitem.
Initiate Also	Select to initiate the created workitem
Synchronous Routing	Select the Synchronous Routing checkbox to enable synchronous routing of workitems.

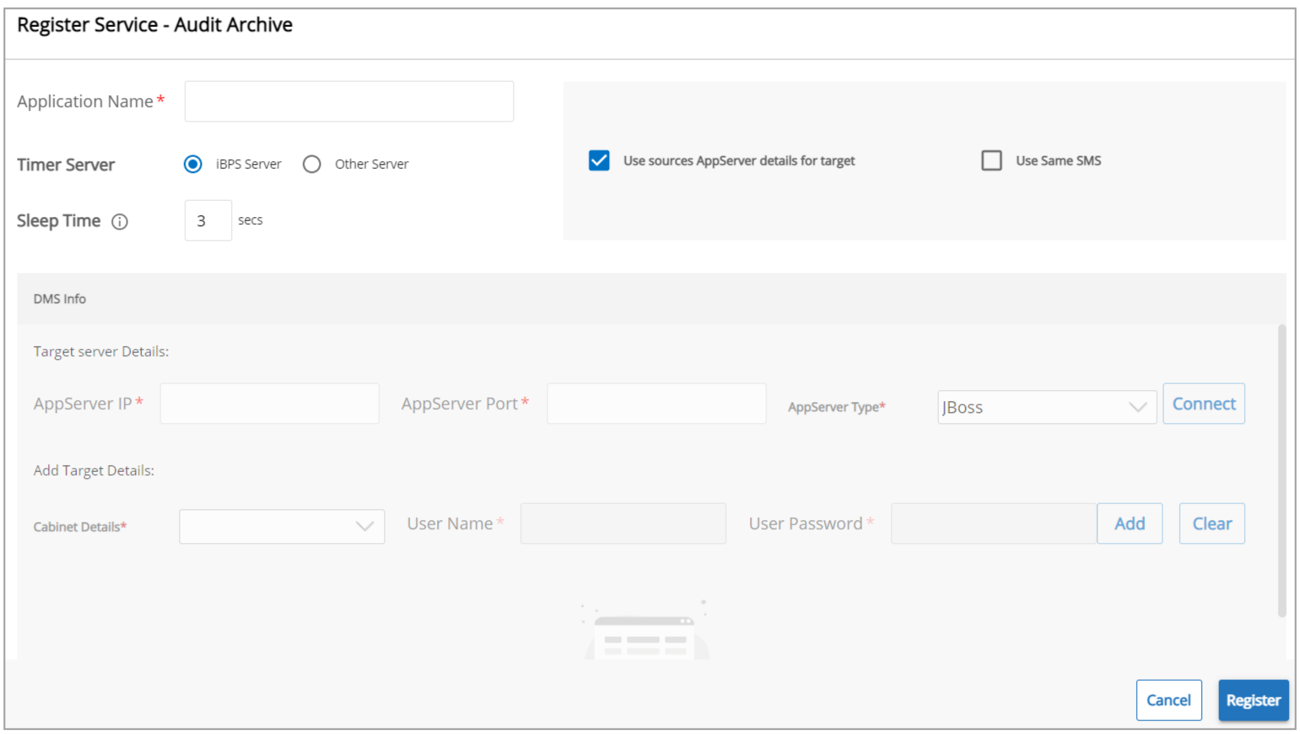
Tab	Description
Set and Complete	Select the Set and Complete checkbox and set the following fields: • Introduction Activity • Regular Expression • Process Variable • Search Workitem in History also • Complete Workitem

4. Click **Register**.

Audit Archive

Perform the below steps to register the Audit Archive:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **Audit Archive**. The Register Service - Audit Archive dialog appears.



3. Specify the following information:

Tab	Description
Application Name	Enter the Audit Archive name.

Tab	Description
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown .
Select Server	Select the remote server from this dropdown list.
Sleep Time	Sleep Time is the duration in seconds after which service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.
Use Sources AppServer details for target	Select to use the appserver details of the source for the target. This checkbox is selected by default. Deselect this option to specify the target DMS information. Deselecting this enables the DMS Info fields.
Use Same SMS	SMS (Storage management system) enables the processing of documents like Add Documents; import documents; upload documents, and so on. Select the Use Same SMS checkbox. It allows you to use the same SMS source and target cabinet to Archive the Documents. For each and every Application Server, there is a separate SMS running for uploading the documents, and if Source and target cabinet both are different. In that case, the Application server does not use the same SMS.
DMS Info	It contains the following details: • Target Server Details: Specify the following fields to connect to the target application server: ◦ AppServer IP: Enter the AppServer IP. ◦ AppServer Port: Enter the AppServer Port. ◦ AppServer Type: Enter the AppServer Type. ◦ Connect: Click **Connect**. The Target Server gets connected. • Add Target Details: Specify the following fields to add the target cabinet: ◦ Cabinet Details: Select the Cabinet using the dropdown. ◦ User Name: Enter the User Name. ◦ User Password: Enter the user password.

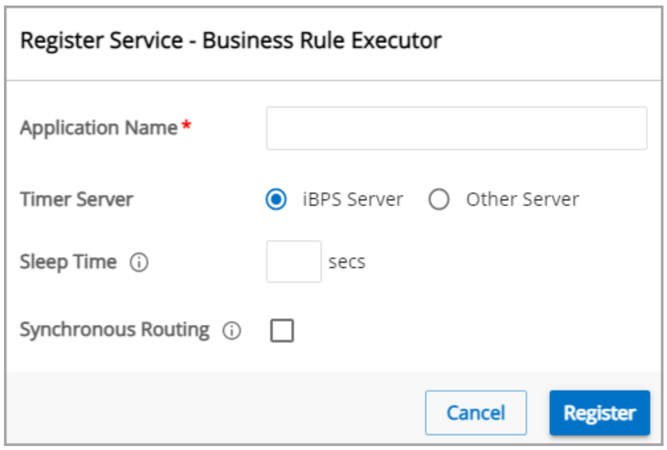
4. Click **Register**.

Business Rule Executor

It allows you to execute Business Rules activity if the server is running in asynchronous mode.

Perform the below steps to register Business Rule Executor:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **Business Rule Executor**. The Register Service-Business Rule Executor dialog appears.



3. Specify the following information:

Field	Description
Application Name	Enter the Business Rule Executor name.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown .
Select Server	Select the remote server from this dropdown list.
Sleep Time	Sleep Time is the duration in seconds after which the service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.
Synchronous Routing	Select the Synchronous Routing check box to enable synchronous routing of workitems.

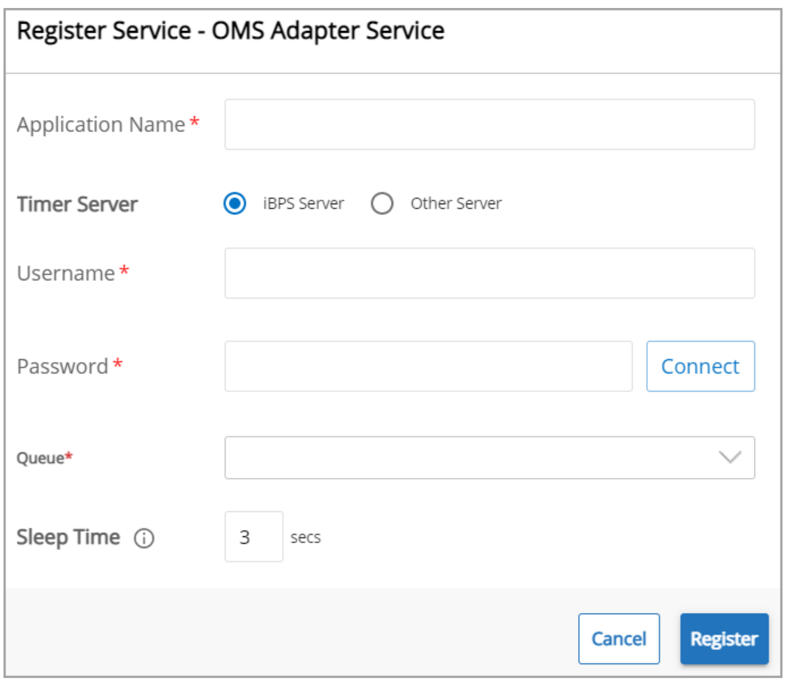
4. Click **Register**.

OMS Adapter Service

This service provides a reference to the communication templates that are designed and deployed on OMS (CCM) platform. This service must be registered when OMS adapter is used to consume these communication templates within a process designed in NewgenONE.

Perform the below steps to register OMS Adapter Service:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **OMS Adapter Service**. The Register Service - OMS Adapter Service dialog appears.



3. Specify the following information:

Option	Description
Application Name	Enter the OMS Adapter Service name.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown .

Option	Description
Select Server	Select the remote server from this dropdown list.
Username	Enter the User Name for the specified Service. The User must have relevant permissions on Queue associated with pertaining Workstep.
Password	Enter the user password.
Queue	Select the Queue using the dropdown. This field contains the queues list stored in the selected cabinet.
Sleep Time	Sleep Time is the duration in seconds after which service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.

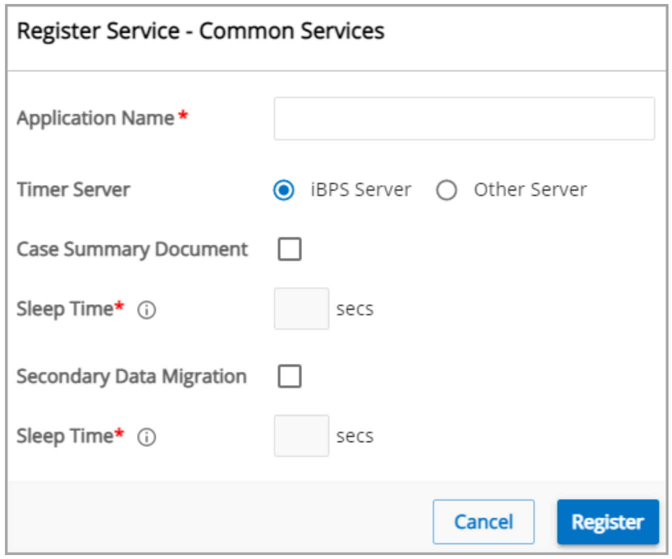
4. Click **Register**.

Common Services

Common Services allow you to generate case summary documents or to transfer data to a secondary cabinet when the secondary cabinet is defined for the current cabinet. The case summary document holds the summary of actions that are performed on all tasks. Common Services are cabinet-specific. Thus, for each option, the utility must be registered only once.

Perform the below steps to register Common Services:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **Common Services**. The Register Service-Common Services dialog appears.



3. Specify the following information:

Option	Description
Application Name	Enter the Common Service application name.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown .
Select Server	Select the remote server from this dropdown list.
Case Summary Document	Select the Case Summary Document checkbox to enable summary actions on all tasks.
Sleep Time	Sleep Time is the duration in seconds after which the service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.
Secondary Data Migration	Select the Secondary Data Migration checkbox.
Sleep Time	Sleep Time is the duration in seconds after which the service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.

4. Click **Register**.

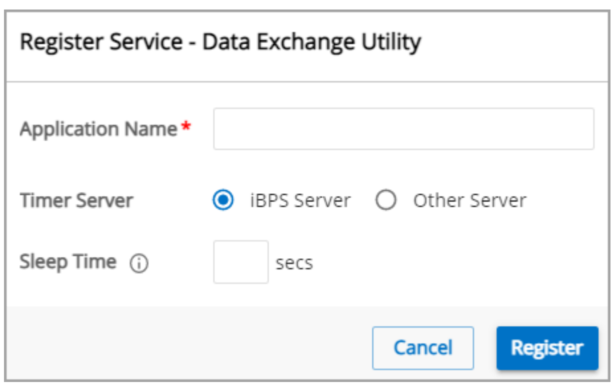
Data Exchange Utility

Data Exchange Utility allows you to exchange data between the selected database entities, their identified data fields, and corresponding process variables (queue, external and complex variables) as per the definition on data exchange workstep in the process.

The workitems eligible for data exchange operations are added to a common system-generated queue. From this common queue, Data Exchange Utility first locks a particular workitem and then processes all Data Exchange operations defined for that workitem. As Data Exchange Utility is a cabinet-specific service therefore only one Data Exchange Utility is sufficient to register, though more than one Data Exchange Utility can also be registered for the same cabinet.

Perform the below steps to register Data Exchange Utility:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **Data Exchange Utility**. The Register Service-Data Exchange Utility dialog appears.



3. Specify the following information:

Option	Description
Application Name	Enter the Data Exchange Utility application name.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown .
Select Server	Select the remote server from this dropdown list.

Option	Description
Sleep Time	Sleep Time is the duration in seconds after which the service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.

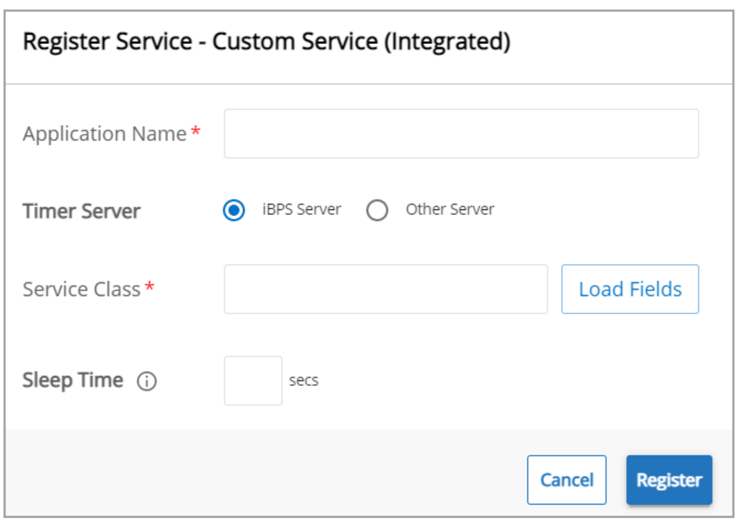
4. Click **Register**.

Custom Service(I)

Custom Services are the utilities created through the implementation team or implementation partner for business use cases. Integrated custom services are those custom services that are written using a product framework for services.

Perform the below steps to register Integrated Custom Service:

1. Click **+Register Service**. The dropdown menu appears.
2. Click **Custom Service(I)**. The Register Service-Custom Service (Integrated) dialog appears.



3. Specify the following information:

Option	Description
Application Name	Enter the Integrated Custom Service application name. The Application Name appears while listing the services.

Option	Description
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown.
Select Server	Select the remote server from this dropdown list.
Service Class	Specify the Service Class with a package.
Sleep Time	Sleep Time is the duration in seconds after which the service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.
Load Fields	Click Load Fields for loading the custom fields defined for this service.

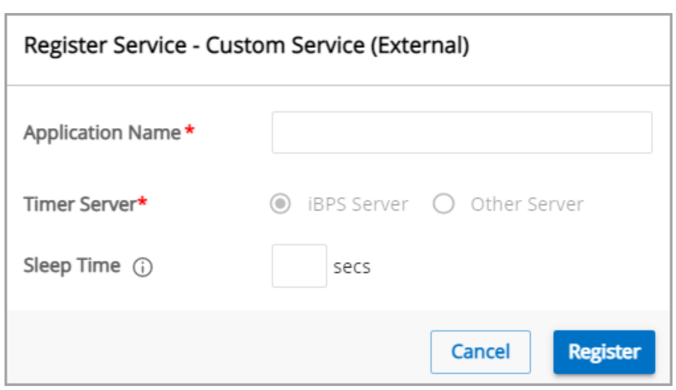
4. Click **Register**.

Custom Service(E)

Custom services are those utilities that are written by the implementation team or implementation partner for business use-cases. External custom services are the ones that are not written using a product framework for services.

Perform the below steps to register Custom Service (E):

1. Click **+Register Service**. The dropdown menu appears.
2. Click **Custom Service(E)**. The Register Service-Custom Service (External) dialog appears.



3. Specify the following information:

Option	Description
Application Name	Enter the Custom Service (E) name.
Timer Server	You can select any of the following server: • Local Server: Select to use the time of the local server. • Remote Server: Select to enable the Select Server option. Now Select Server using the dropdown .
Select Server	Select the remote server from this dropdown list.
Sleep Time	Sleep Time is the duration in seconds after which the service looks for any new workitem allocated for processing. Specify the Sleep Time in seconds.

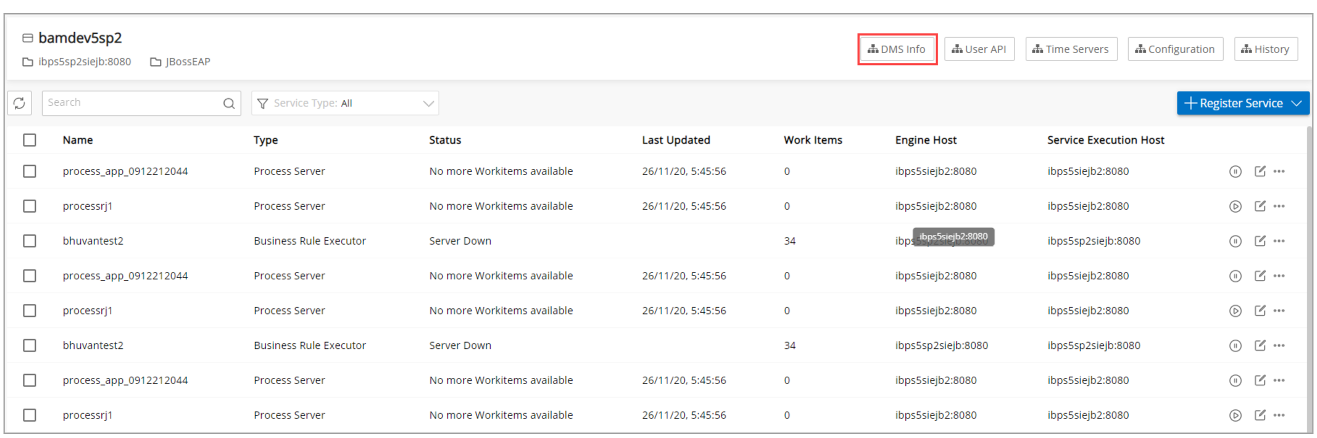
4. Click **Register**.

Editing DMS info

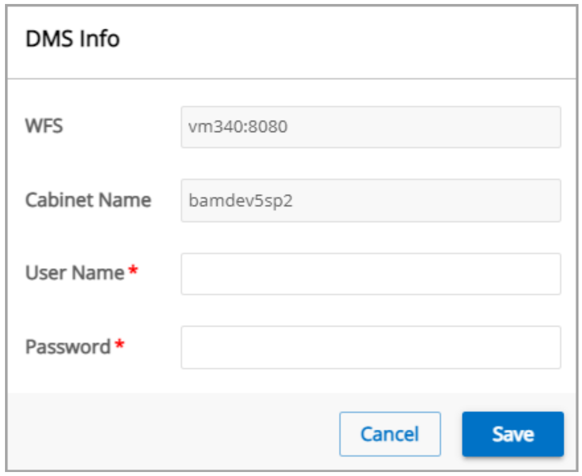
The DMS Info enables the synchronous routing of workitems. The DMS information such as User name, password, and more is specified synchronously to generate Session ID using the DMS Info.

Perform the below steps to edit the DMS Info:

1. Go to the Utility Management. The Utility Management page appears.



2. Click **DMS Info**. The DMS Info dialog appears.



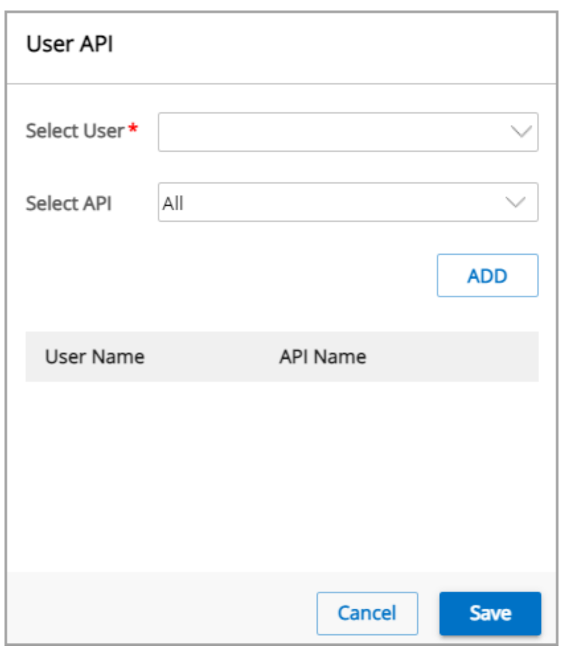
3. Enter User Name and Password.
4. Click **Save**. The DMS Info gets saved.

Setting user API

User API allows you to prepare a separate log for a specific user of different APIs.

Perform the below steps to edit the User API:

1. Go to Utility Management. The Utility Management screen appears.
2. Click **User API**. The User API dialog appears.



3. Select the User using the dropdown list.

4. Select API using the dropdown list.
5. Click **Add**. The User gets added.
6. Click **Save**. The User API gets saved.

Registering time server

Time Servers allow you to register and execute the services from different Application servers.

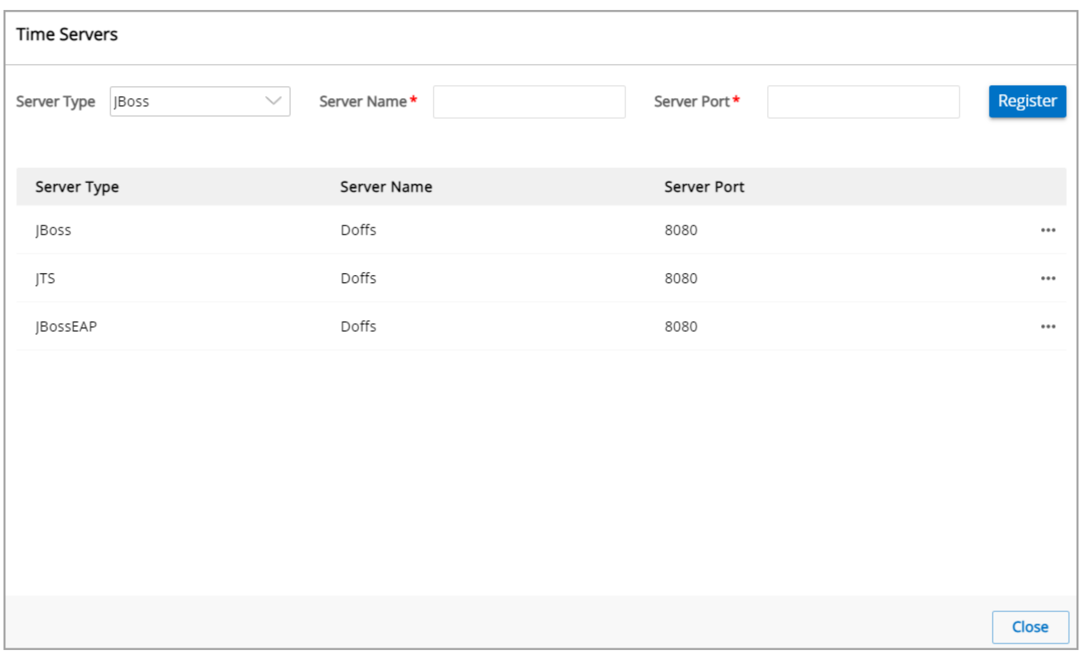
For example, you want to register the Mailing agent utility on server S1 to send an email.

You have two solutions: either you can register the Mail utility on server S1 and executes it from here or you can register the Mail utility on server S2 and execute it here for server S1 using Timer Server.

In this case, server S2 is the Engine Host and server S1 is the Execution Host.

Perform the below steps to register Time Servers:

1. Go to Utility Management.
2. Click **Time Servers**. The Time Servers dialog appears.



3. Specify the following information:

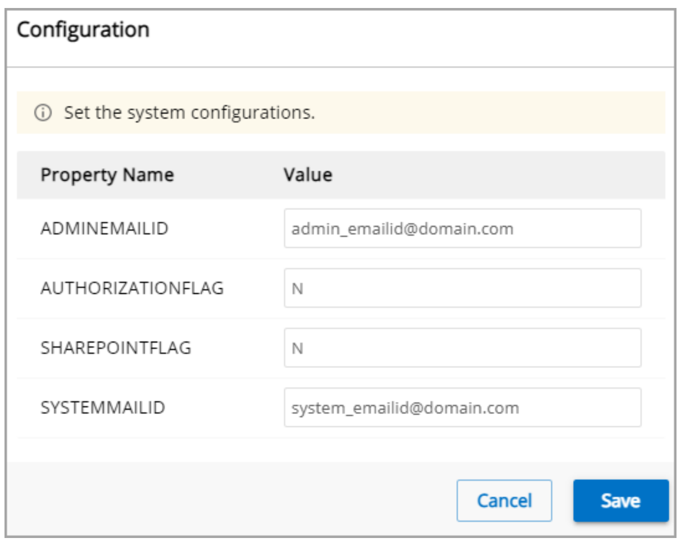
Option	Description
Server Type	Select the Server Type using the dropdown list.
Server Name	Enter the Server Name.
Server Port	Enter the Server Port.

4. Click **Register**.

Editing configuration

Perform the below steps to edit the Configuration:

1. Go to Utility Management.
2. Click **Configuration**. The Configuration dialog appears.



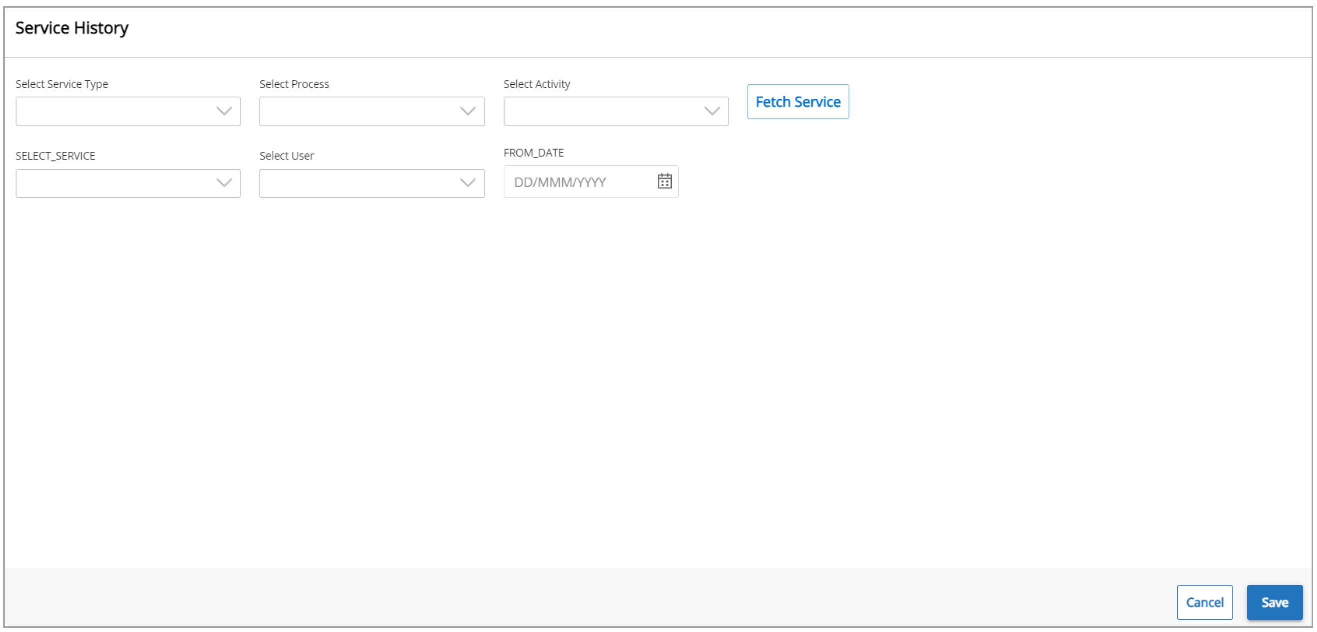
3. Enter the value of the required properties.
4. Click **Save**.

Accessing service history

The History option allows you to fetch the service history.

Perform the below steps to fetch Service History:

1. Go to Utility Management.
2. Click **History**. The Service History dialog appears.



3. Specify the following fields on the Service History dialog:

Option	Description
Select Service Type	Select the Service Type using the dropdown.
Select Process	Select the Process using the dropdown.
Select Activity	Select the Activity using the dropdown.
Fetch Service	Click Fetch Service to fetch service history.
Select Service	Select the Service using the dropdown.
Select User	Select the User using the dropdown.
From DATE	Select the From Date using the date picker .

Option	Description
To DATE	Select the To Date using the date picker .
Record Size	Select the number of records you want to see in one page.

4. Click **Fetch History**. The history appears for the given parameters.

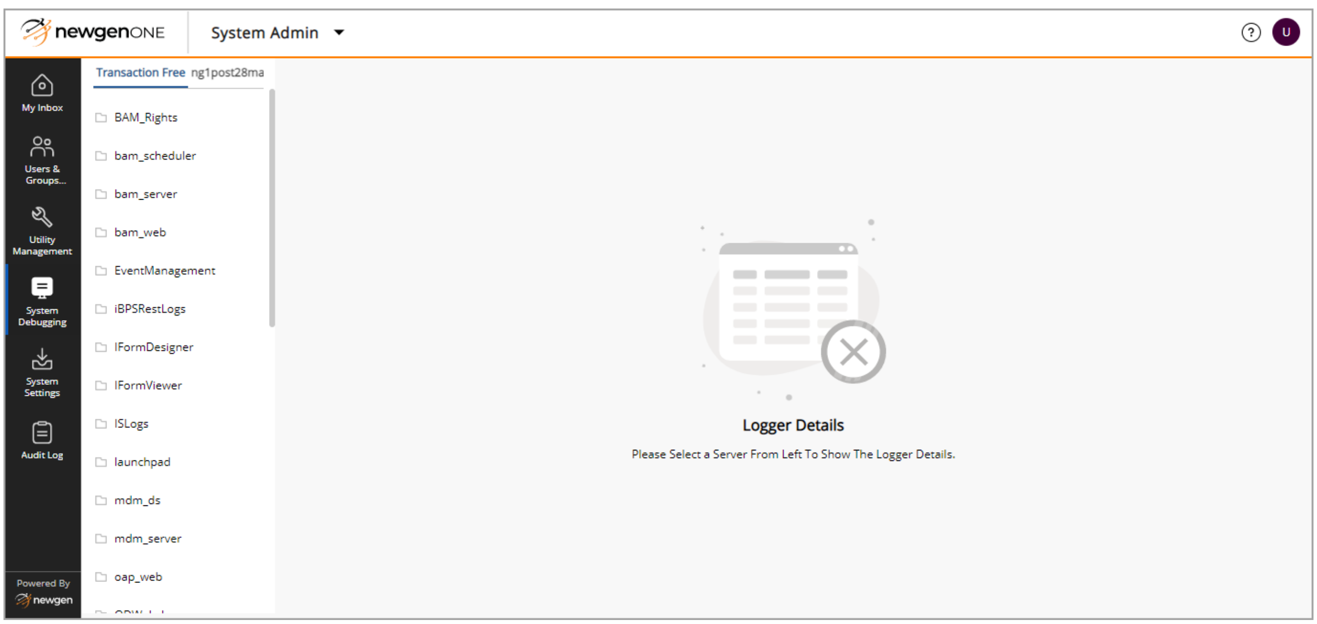
System Debugging

System Debugging allows you to fetch the log files of all the modules of NewgenONE. Using System Debugging you can view logs of a particular module and access its corresponding log file.

Here, the system generates log4j property files for all the modules. Run time logs classification is possible as well.

Perform the following steps to access the System Debugging:

1. Sign in to System Admin Workspace.
2. Click **System Debugging** on the navigation pane. The System Debugging window appears.

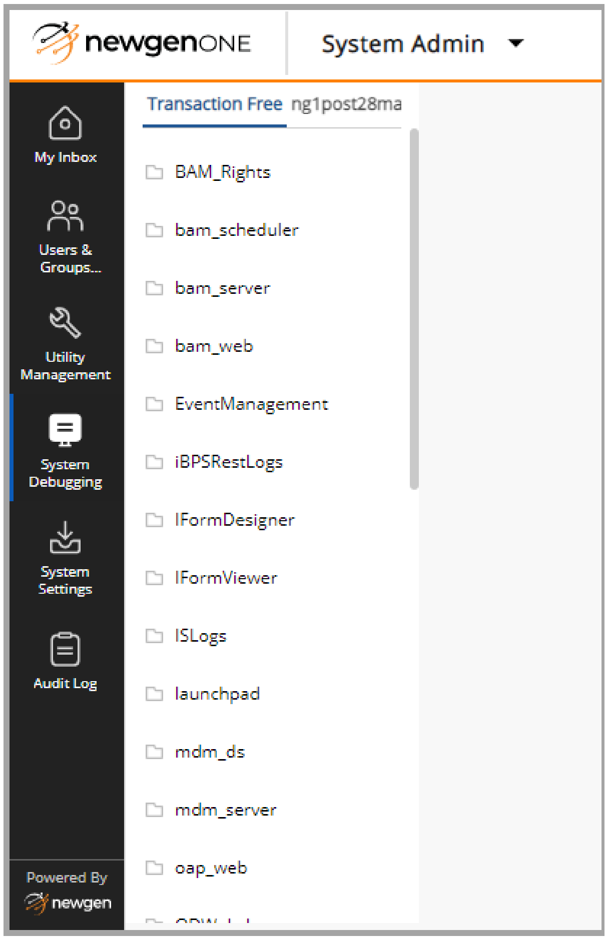


System Debugging contains the following tabs:

- Transaction Free - This tab displays the common loggers for all the cabinets in the same environment.
- Logged in cabinet - This tab displays the loggers available in the logged in cabinet.

Accessing existing loggers

The Transaction Free tab contains the existing loggers in the system.



The loggers contain the following options:

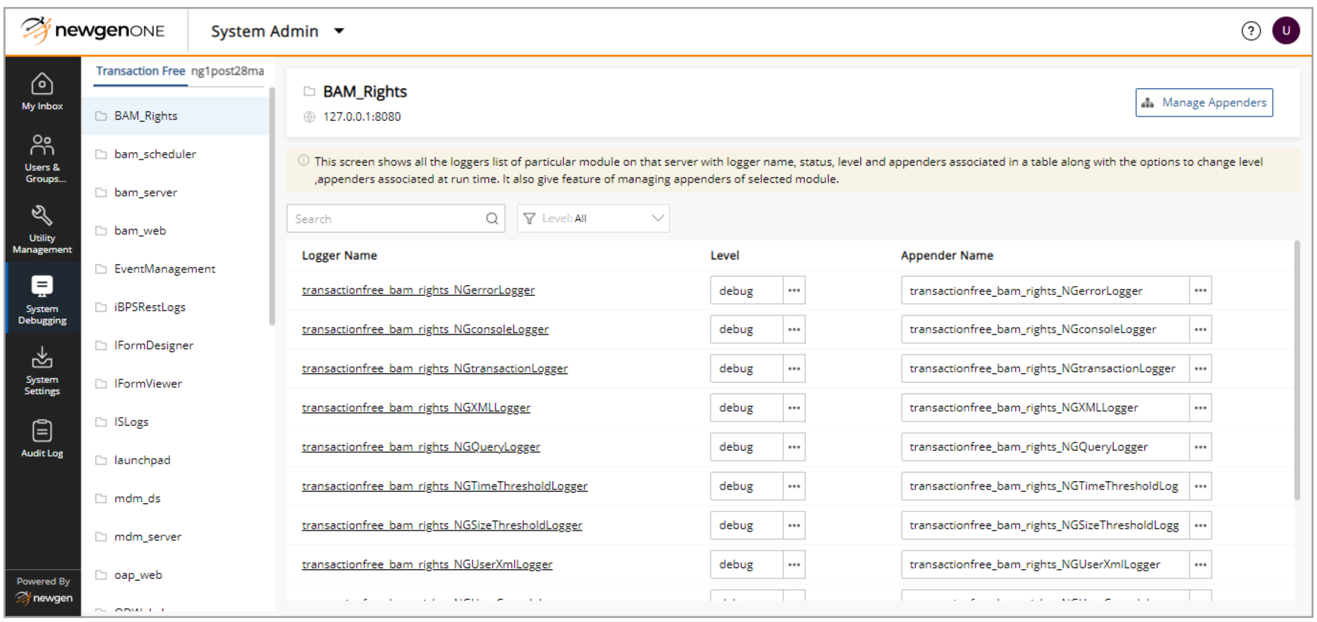
Option	Description
Search Box	You can search the logger with its name using the search box.
Level	Click dropdown given against the Level to view the logger with the following level: • Debug • Fatal • Off • Error • Info
Logger Name	It displays the Logger Name available in the Transaction Free.

Option	Description
Status	It displays the enable or disable status of loggers.
Appender Name	It displays the Appender Name of loggers.

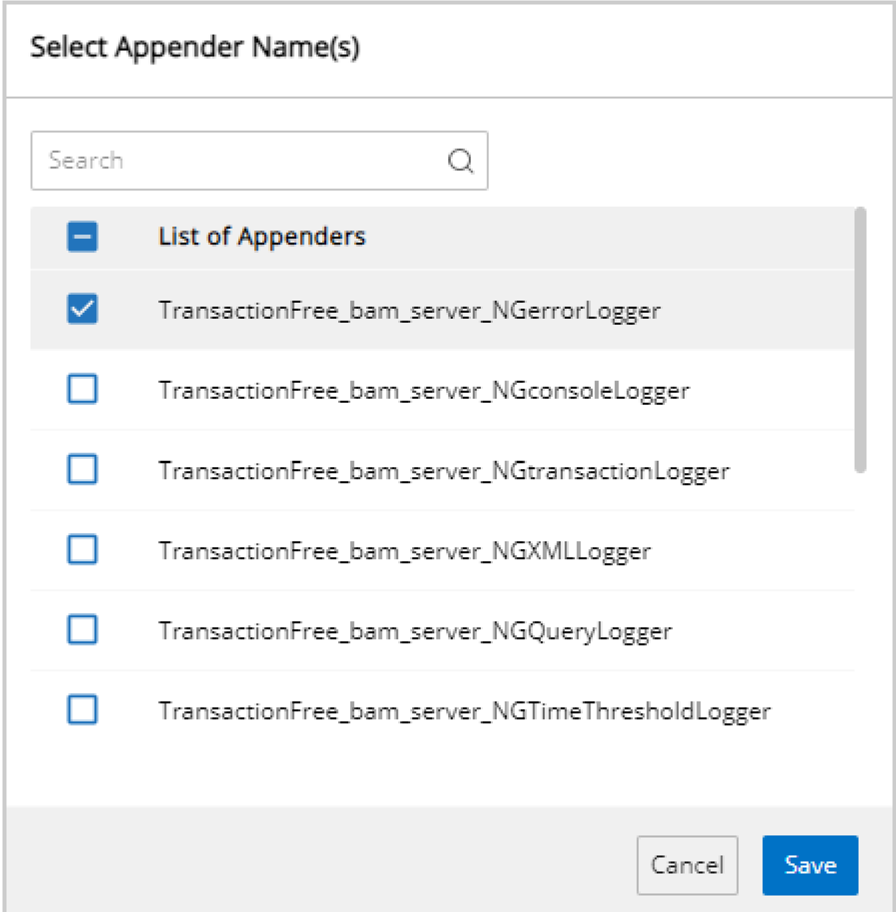
Editing associate appender

Perform the below steps to modify the associate appender:

1. Go to the Transaction Free.
2. Click any logger in Transaction Free. The logger page appears.



3. Click ••• adjacent to the Appender Name. The Select Appender Name(s) dialog appears.



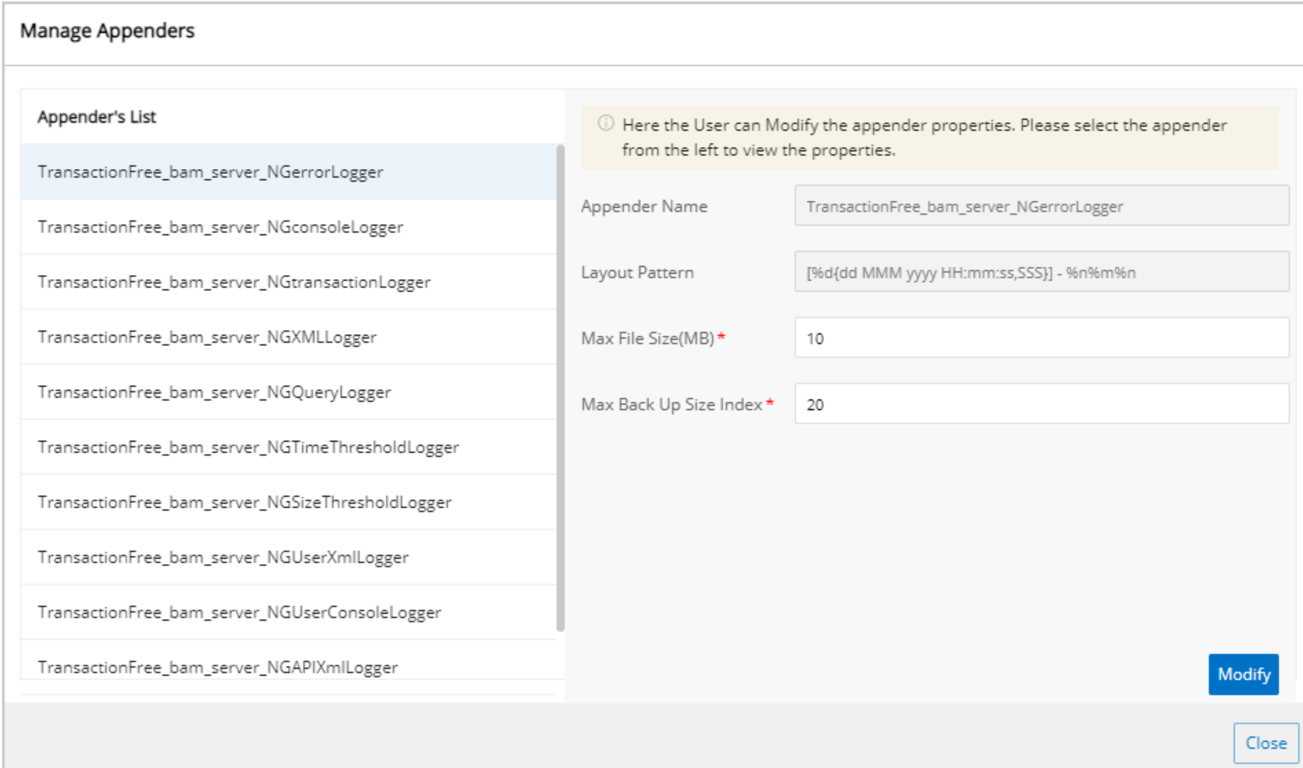
4. Select the checkbox given along with Appender Names if you want to change the Appender.
5. Click **Save**.

Managing appender

Manage Appender allows you to edit the appender properties.

Perform the below steps to Manage Appender:

1. Go to the Transaction Free.
2. Click **Manage Appenders** in the upper-right pane. The Manage Appenders dialog appears.
3. Select the required appender from the Appender's List.



4. Enter the Max File Size (MB).
5. Enter the Max Back Up Size Index.
6. Click **Modify**. The Appender gets modified.

Logged in cabinet

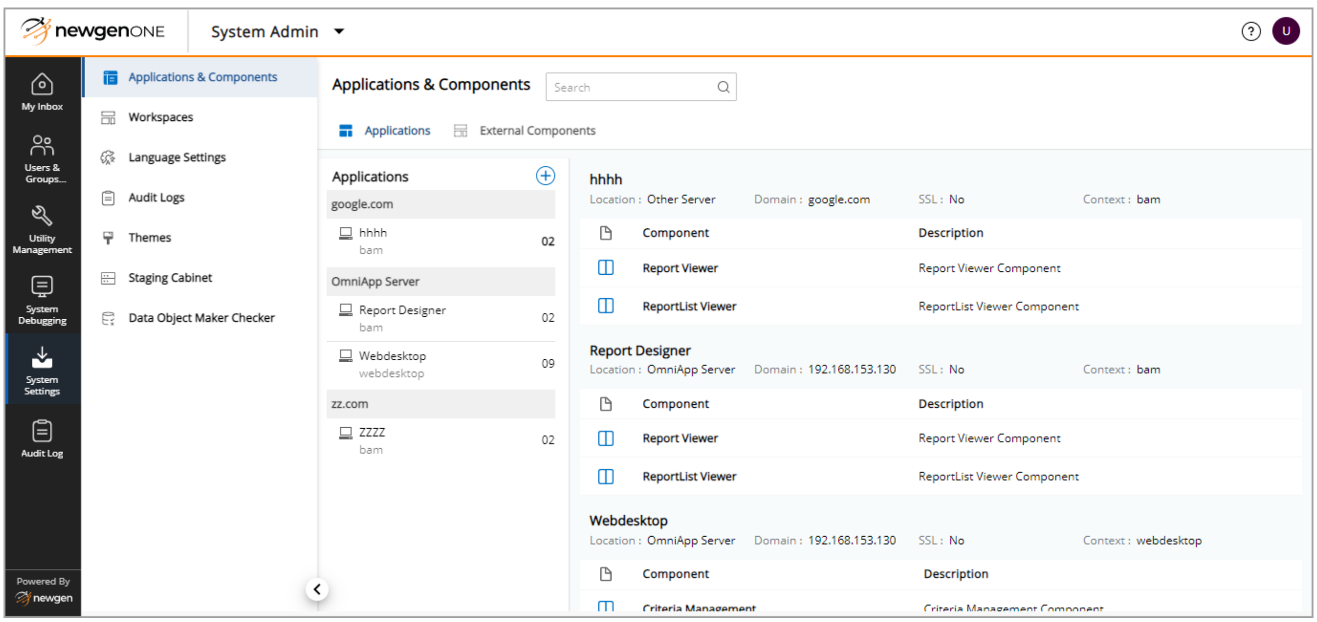
The logged in cabinet tab contains the loggers created by users. Refer to the Accessing existing loggers section for more information on the process of accessing the available loggers and managing appenders.

Managing system settings

System Settings allow you to register applications, components, component instances, external applications, and views. It displays a list of components associated with the user's view. Every user is associated with a view that contains the list of added component instances. Using System Settings, you can define a workspace and modify layouts. You can also modify the Language and themes as per the requirement.

Perform the following steps to access the System Settings:

1. Sign in to System Admin Workspace.
2. Click **System Settings** on the navigation pane. The System Settings window appears.



The System Settings contains the options for:

- Managing applications and components
- Managing workspaces
- Managing language
- Generating logs
- Managing themes
- Staging cabinet
- Managing maker checker preferences

- Managing cache

Managing application and components

The Applications & Components option in the System Settings menu displays the applications and external components that are added to the NewgenONE server. It also allows you to add applications and external components and manage them. The Applications & Components window is comprised of two tabs: Applications and External Components.
The Applications tab displays all the added applications on the left pane and the details of each selected application on the right. This tab also allows you to add applications.
The External Components tab displays the list of all the added external components. You can manage each external component using the view, edit, or delete icons next to them. This tab also allows you to add external components.

This chapter covers the following topics:

- Adding an applications
- Adding an external components
- Managing external components

Adding an application

The Applications tab allows you to add applications as required.

To add an application, perform the following steps:

1. Click the add icon ⊕ on the Applications tab. The Add Application dialog appears.
2. Select the location of the application to add.
    - Select **Remote Server** if the application is available on a remote server.
    - Select **Local Server** if the application is available on a local server.
3. Enter the application name, domain, port, and context information in their respective fields.
4. Select the **SSL** checkbox for a secured connection.
5. Click **Register**. The added application now appears on the Applications tab.

Adding an external component

The External Components tab allows you to add external components as required.

To add an external component, perform the following steps:

1. On the External Components tab click **+ Add External Component**. The Add External Application dialog appears.
2. Enter the name and URL of the component in their respective fields.
3. Select the checkbox to pass your authentication token to the URL. Authentication tokens can pass information such as username, cabinet name, and so on.
4. Click **Register**. The added component now appears on the External Components tab.

Managing external components

The External Components tab allows you to manage the added external components. You can perform the following actions on the added components:

- **View** - Click the view icon next to the required component to view it on a pop-up window.
- **Edit** - Click the edit icon next to the required component to launch the Edit External Application dialog. On this dialog box you can edit the application name and URL as required and then click **Modify** to save the changes.
- **Delete** - Click the delete icon next to the required component and then click **Delete** to remove the component.

Managing workspaces

The Workspaces option under the System Settings menu displays the available workspaces under the Deployed tab and the saved workspaces under the Drafts tab.

The Deployed tab displays all the active workspaces and their components. The search bar allows you to search a specific workspace by name. The Workspaces window also allows you to see the workspaces in list or tile view.

The Workspaces option also allows you to create new workspaces and edit existing workspaces.

Creating and editing workspaces

To create a new workspace, perform the following steps:

1. On the Workspace window click **+ Create Workspace**. The Create Workspace window appears.
2. Enter the **Workspace Name** and the **Description** of the workspace as required in their respective fields under the Basic Details tab.
3. Click **Next**. The Assign Groups tab appears.
4. Select the required user groups to provide access to the workspace. You can use the search bar to locate the required user group. The selected groups appear on the Selected Group(s) pane.
5. Click **Next**. The Components tab appears.
6. Select the required internal and external components to include in the workspace.
7. Click **Next**. The Templates/ Layout tab appears.
8. Double-click the required predefined template. The Arrange Components window appears.
   Alternatively, click **Create Custom Layout** and follow steps 3 to 5 of the template creation procedure to create a custom template.
9. Perform the following changes on the Arrange Components window:
   a. Click **+ Add** Tab to add a tab. The Add Tab dialog appears.
   b. Enter the required tab name.
   c. Select the layout for the tab from the Select Layout dropdown list.
   d. Click **Browse** to select the required icon.
   e. Select the required icon and then click **Save**. The tab now appears in the preview area. You can click the Add Tab icon at the bottom-left to add multiple tabs.
   f. Click **+ Add Subtab** to create subtabs under the selected tab.
   g. Drag and drop the components from the Selected Components pane to the sections on the template.
10. Click **Next**. The Preview tab appears.
11. Click **Publish** to deploy the workspace. The deployed workspace now appears under the Deployed tab.

To edit a workspace, perform the following steps:

1. Click the edit icon next to the required workspace. The Edit Workspace window appears.
2. Refer to steps 2 to 10 of the new workspace creation procedure to make necessary changes.
3. Click **Publish** to deploy the updated workspace.

To delete a workspace, perform the following steps:

1. Click the delete icon next to the required workspace. The Delete Workspace dialog appears.
2. Click **Delete anyway**. The workspace is now deleted.

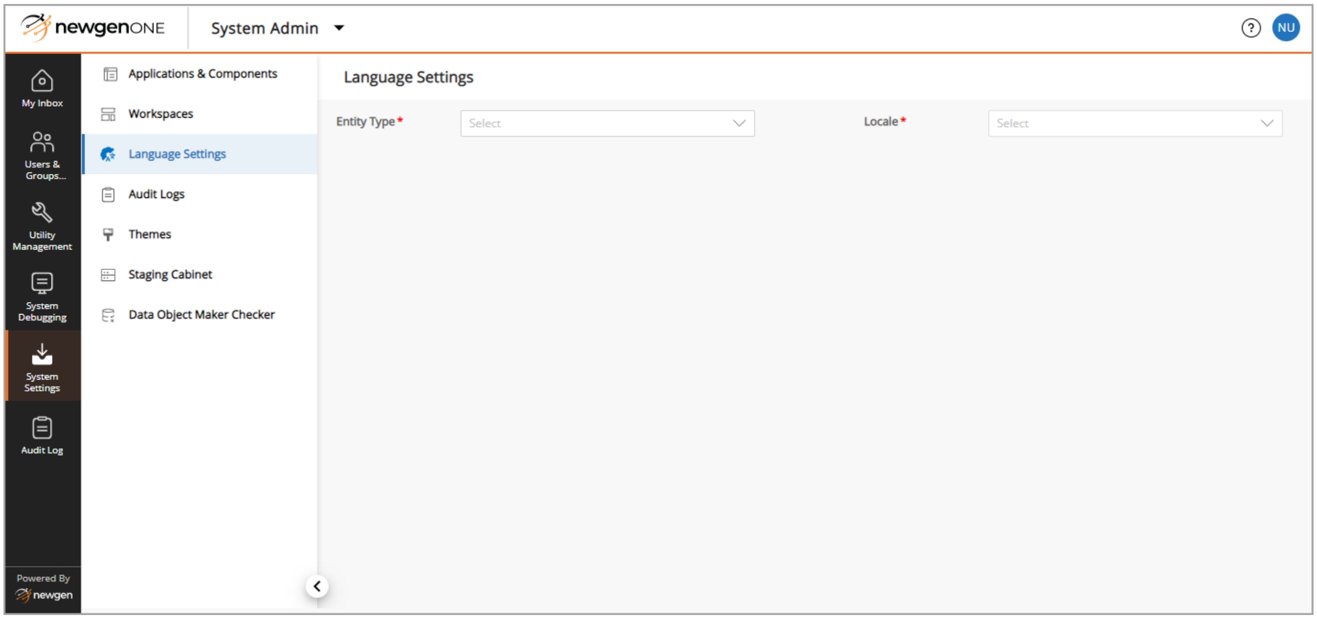
   Any user with the right to access the Workspace menu can delete custom workspaces.

Managing language

The Language Settings feature allows you to set a preferred language for any entity in NewgenONE.

Perform the below steps to add a Language Settings:

1. Go to the System Settings.
2. Click **Language Settings** on the left pane. The Language Settings window appears.



3. Select the Entity Type using the dropdown.
4. Select the Locale using the dropdown.
5. Select the Process Name, Variable Name, Document, Application, Component, Workspaces, and Themes as required from the respective dropdown list.
6. Enter a Multilingual Name.
7. Click **Add**.

Generating logs

The Audit Logs option in the System Settings menu allows you to generate logs of various actions performed in NewgenONE.

To generate logs, perform the following steps:

1. Click the calendar icon on the From Date field and select the required start date.
2. Click the calendar icon on the To Date field and select the required end date.
3. Select the required parameters to generate logs.
4. Click **Generate**. The logs now appear for the indicated date range and parameters.

Managing themes

The Themes option in the System Settings menu allows you to apply the color scheme, font, and spacing of your choice to the BAM components (Dashboard and Report Designer). System Admin Workspace offers multiple predefined themes as well as the ability to modify these predefined themes or create entirely new themes.

To apply a theme from the Themes window, click the **Apply** button on the required theme tile. A pop-up message confirms the action.

This chapter covers the following topics:

- Adding new themes
- Managing themes

Adding new themes

The Themes window allows you to create new themes.

To create a new theme, perform the following steps:

1. On the Themes window, click **Add New Theme**.
2. On the top-left of the window, select a theme from the dropdown list to modify to create a new theme.
3. Select Runtime Workspace or Business Admin Workspace: User to check the live preview of the theme.
4. Select the required preview mode from desktop, tablet, or mobile options. By default desktop is selected.
5. On the right pane under the Basic tab:
    a. Select the required color mode and the colors.
    b. Select the required Navigation panel color.
    c. Select the required font from the Font Family fropdown list.
    d. Select the required Text Size and the Spacing option.
6. Click the **Advanced** tab and then select the following:
    a. Select the required color for the links, buttons, checkboxes, radio buttons, selected dropdown lists, and tabs.

   b. Select the required text size for the main text, links, headings, and subheadings.
7. Click **Custom CSS** and then enter or import your custom CSS id required.
8. Click **Save As and Apply**. The Save As and Apply dialog appears.
9. Enter the required Theme Name. By default the text field displays the predefined theme name.
10. Click **Save As and Apply**.

Editing themes

The Themes window allows you to edit all themes and delete custom themes.

To edit a theme, perform the following steps:

1. Click the edit icon on the required theme in the Themes window. The Modify dialog appears.
2. Click the edit icon on the required resolution of the theme to edit. The theme opens in edit mode.
3. Make the necessary changes and then click **Save and Apply**. The Save and Apply dialog appears.
4. Click **Save and Apply**.

To delete a custom theme, perform the following steps:

1. Click the vertical ellipsis icon on the required custom theme on the Themes window and then select **Delete**. The Delete dialog appears.
2. Click **Delete**. The theme is now deleted from the Custom Themes section.

Staging cabinet

The Staging Cabinet option in the System Settings menu allows you to configure any cabinet on the same server for BAM staging.

To configure a cabinet, perform the following steps:

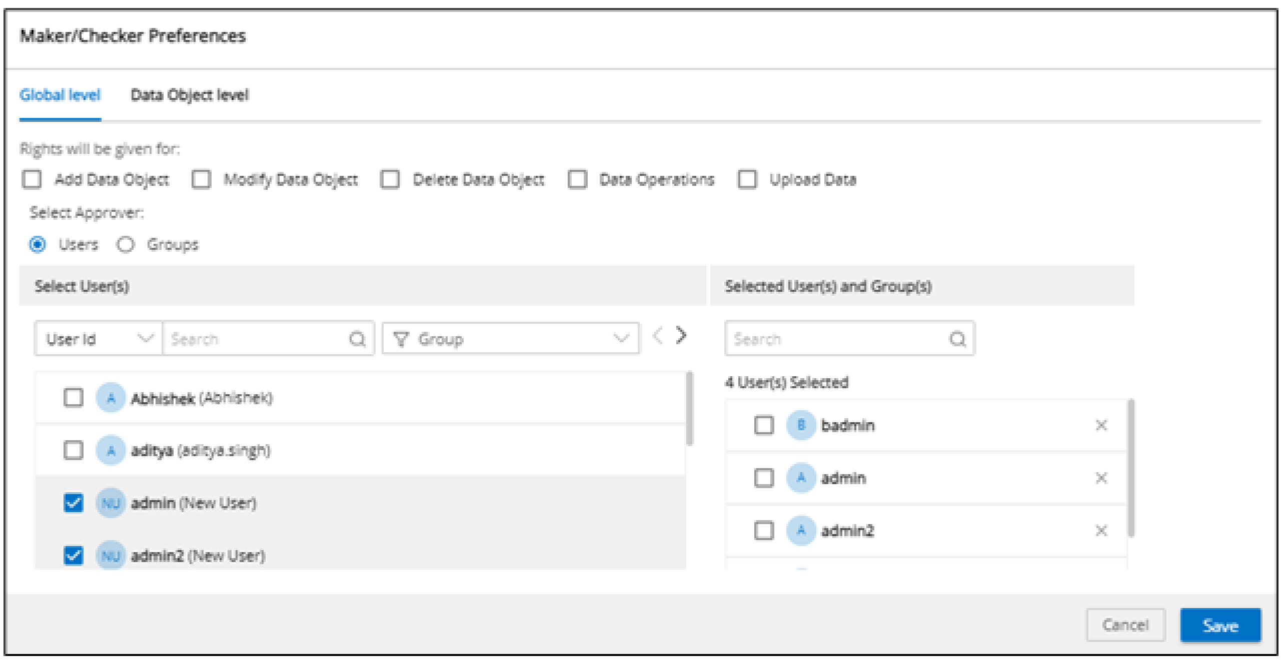
1. Click **Staging Cabinet** in the System Settings menu. The Staging Cabinet tab appears.

2. Select the required cabinet from the Staging Cabinet dropdown list.
3. Select the required option from the Force Staging dropdown list.
   - **Yes** - Reports that are dependent on data from the staging cabinet fetch the data whenever the report is generated.
   - **No** - Reports that are dependent on data from the staging cabinet requests permission to fetch the data whenever the report is generated.
4. Click **Save**.

Managing maker checker preferences

The maker is the user who is responsible for sending requests for approval to the supervisor users. The checker is the user who is responsible for approving the requests sent by other users.
Use Maker Checker to approve or reject the requests sent by other users.

Click **Data Object Maker Checker** to view the Maker/Checker Preferences.



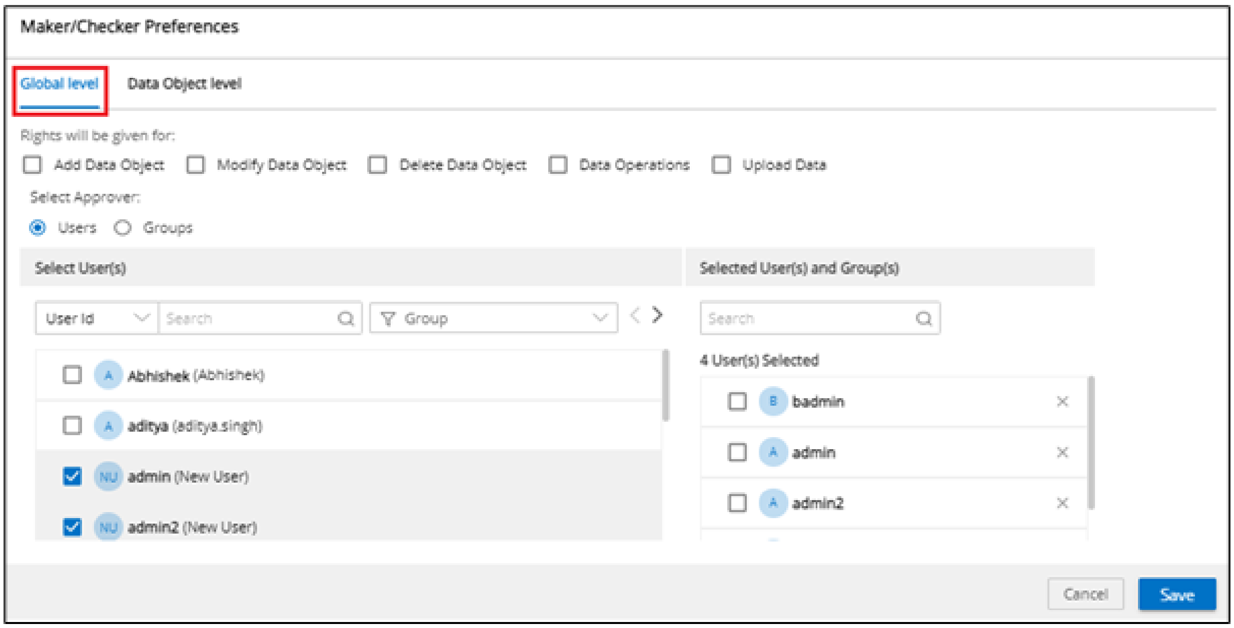
The following maker checker functionalities are explained in this section:

- Global level Maker-checker
- Data Object level Maker-checker

Global level maker checker

Use the Global level maker checker to enable maker-checker on the selected functionalities or complete DMD system.

The Global level maker-checker tab appears by default. If not, click **Global level** to view it.



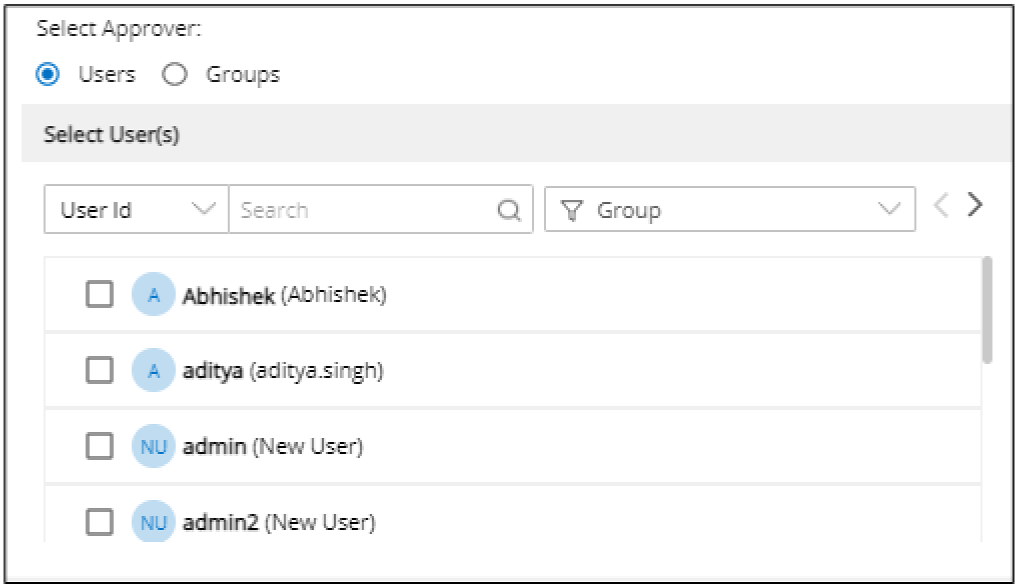
The global level maker-checker preferences allow you to enable or disable the maker-checker process for the following operations:

- Add Data Object
- Modify Data Object
- Delete Data Object
- Data Operations
- Upload Data

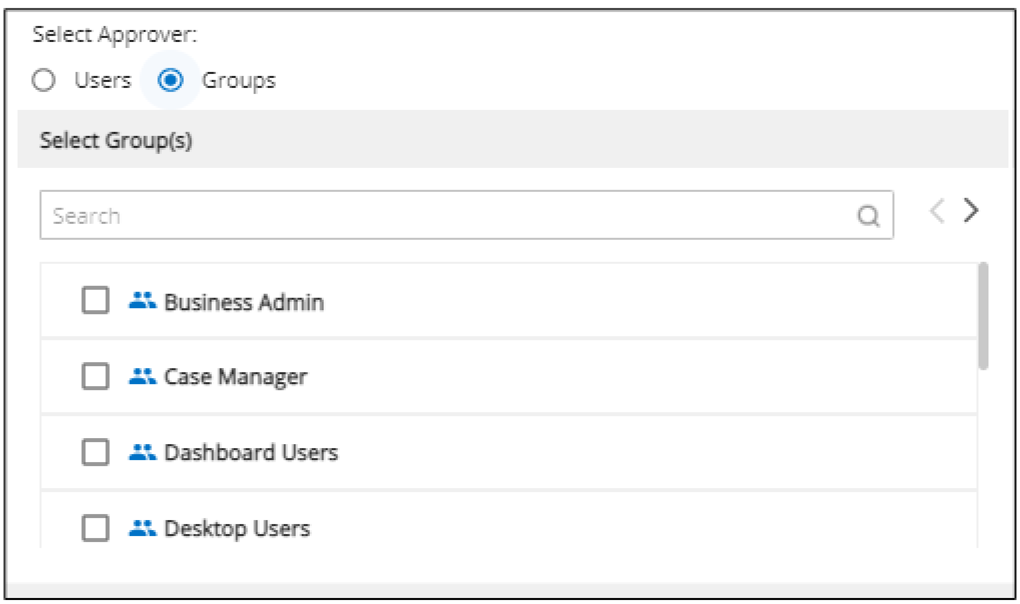
Enable global level maker-checker:
To enable the global level maker-checker, follow the below steps:

1. Select the checkbox adjacent to the operation under the Rights will be given for section.
2. Similarly, to disable an already-enabled operation, clear the checkbox adjacent to the enabled operations.

3. Select Approver:
    - Users: Upon selection, the Select User(s) section appears.

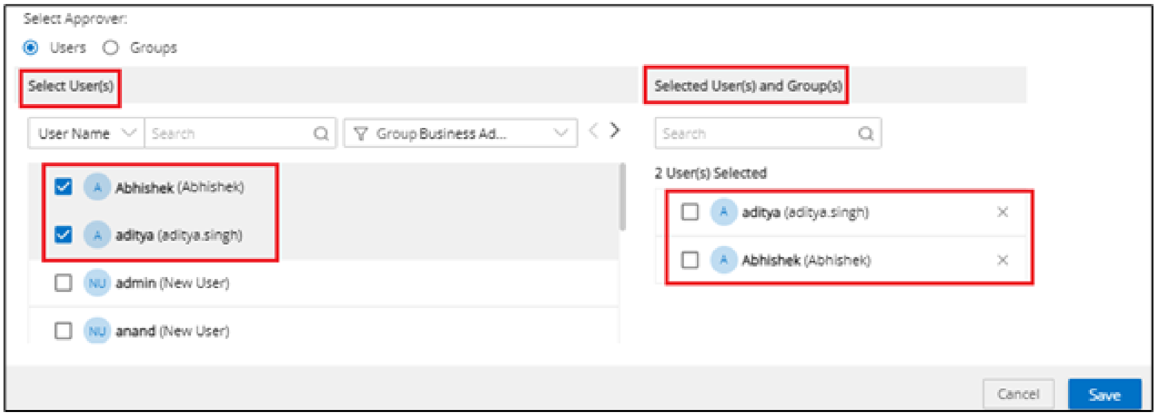


    - Groups: Upon selection, the Select Group(s) section appears.

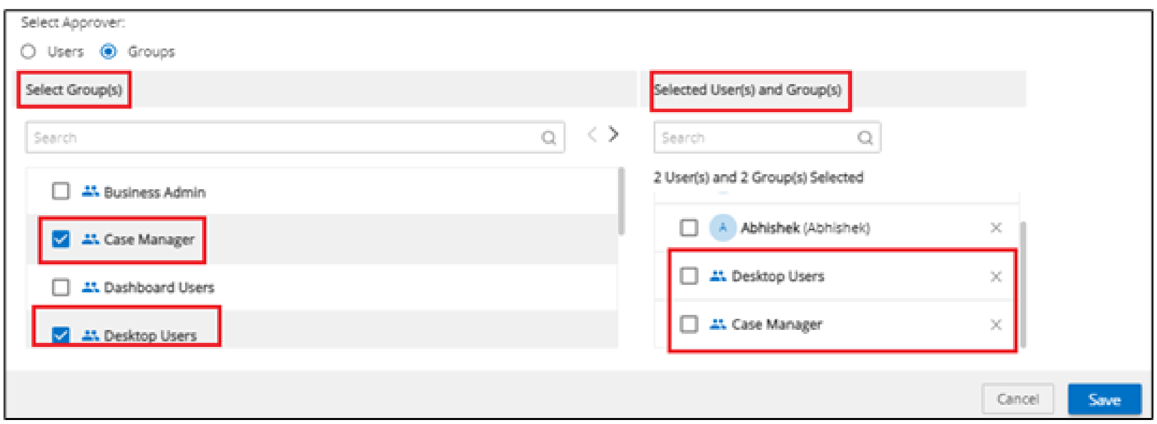


4. Select the required User(s) or Group(s).
    - For User(s)
        - Use the dropdown to select the users either by User Id or User Name. Alternatively, use the search box to search the user by name or ID. Alternatively, use option to sort the users list by groups.

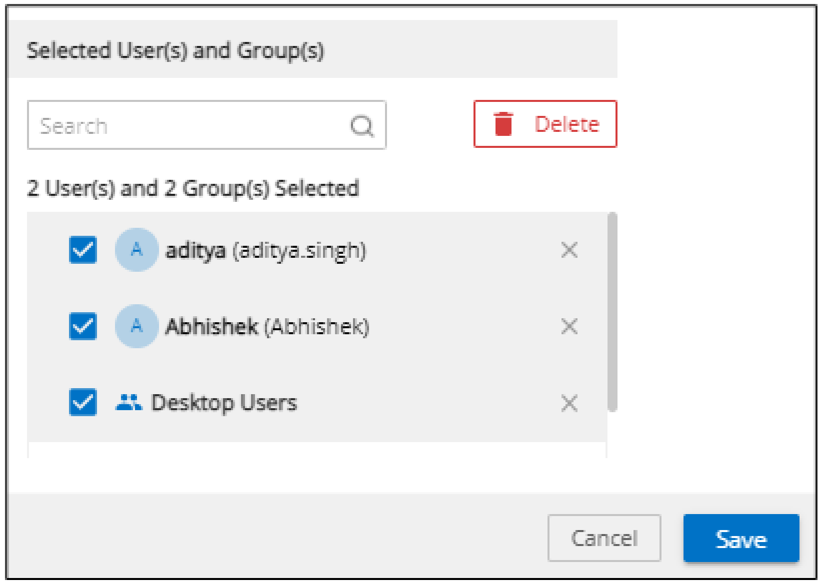
Select the checkbox adjacent to the user name or user ID. The selected user gets added to the Selected User(s) and Group(s) list.



- For Group(s)
  - Select the checkbox adjacent to the group name to it. The selected user gets added to the Selected User(s) and Group(s) list.
    Alternatively, use the search box to search the group by name.



- Use < and > options to move to the previous or next list of users or groups respectively.
- Use the search box present under Select User(s) and Group(s) section to search the selected user or group.
- Click × present next to the name of selected user or group to remove the selected user or group.



> Select the checkbox adjacent to the user or group name under Selected User(s) and Group(s) section and then click the delete option to remove the selected user(s) or group(s).

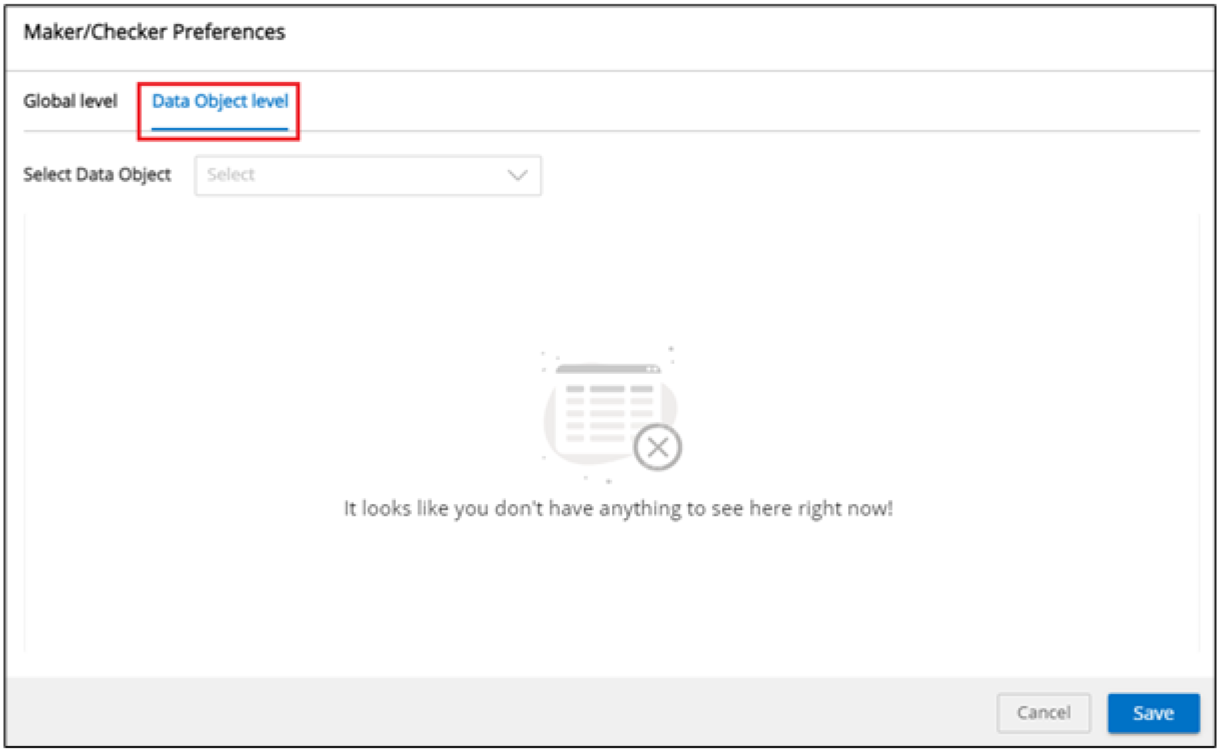
5. Click Save to save changes made to the global level maker checker. The preferences added successful toast appears.

> Use the Cancel option to close the Maker Checker Preferences dialog without saving the changes.

Data object level maker checker

Use the Data object level maker checker to enable maker-checker on the selected data object or on all the data objects of the DMD system.

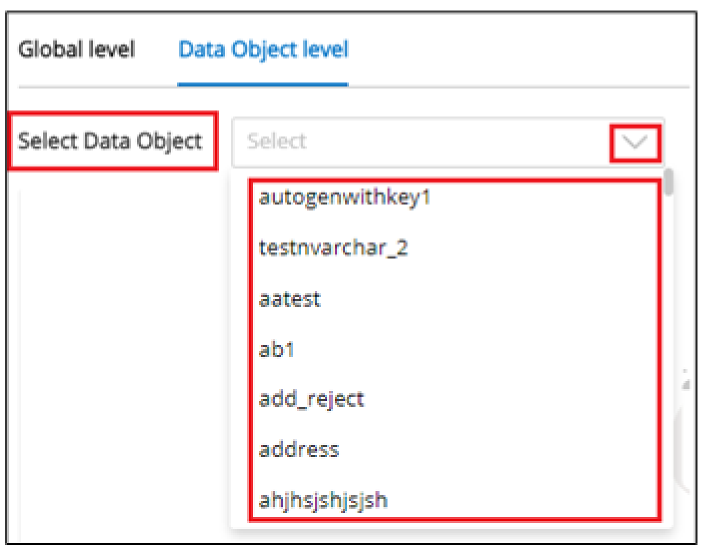
Click **Data Object level** to view it.



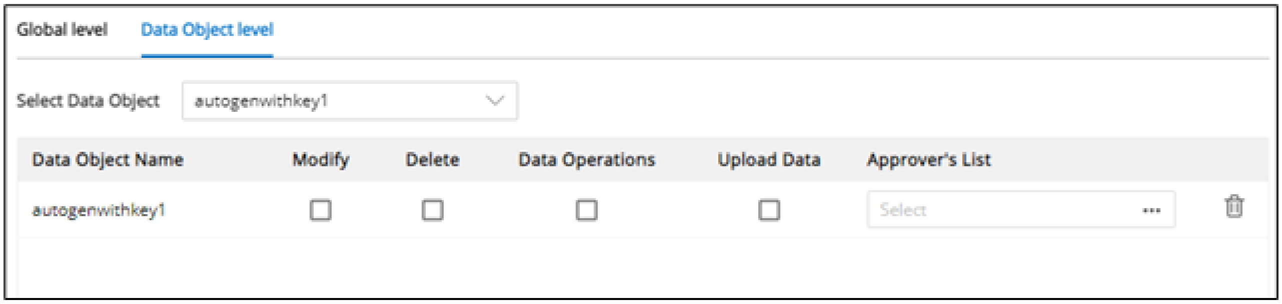
Enable data object level maker-checker:

To enable the data object level maker-checker, follow the below steps:

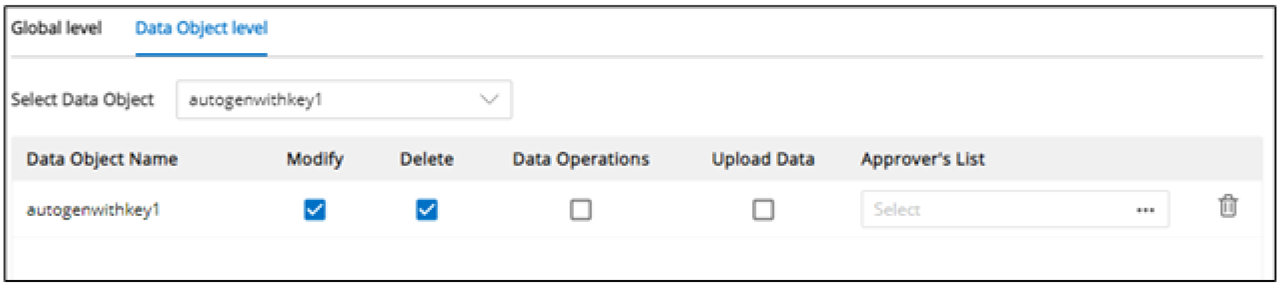
1. Click **Select Data Object** dropdown to view the list of data objects.



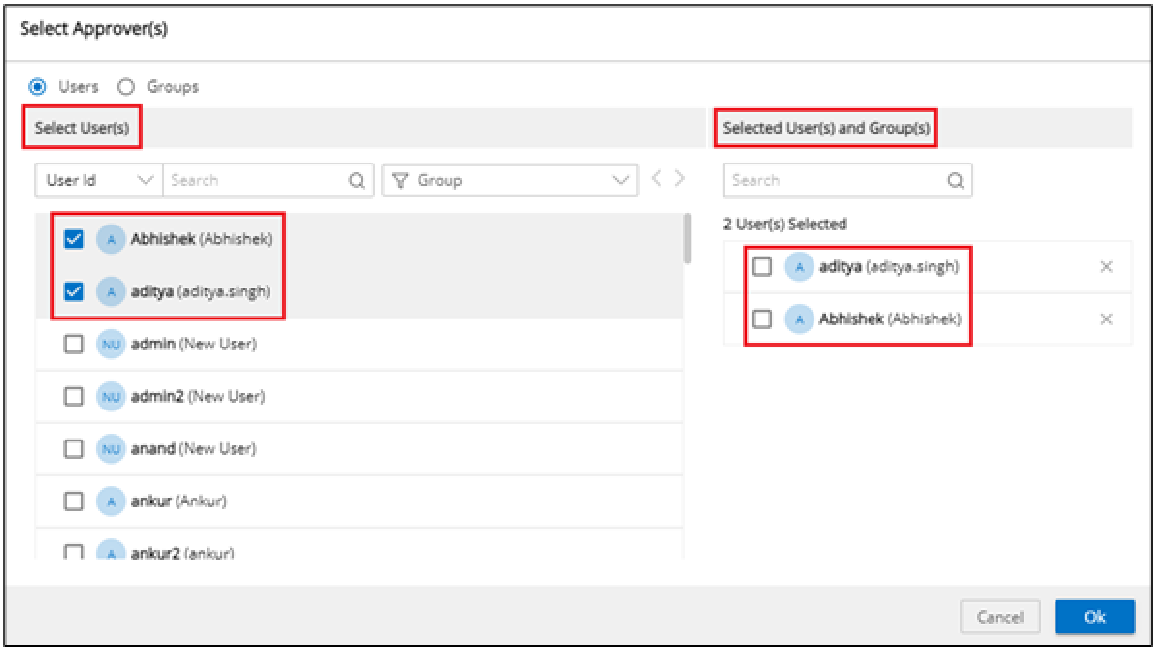
2. Select the required data object. The added data object appears in the list.



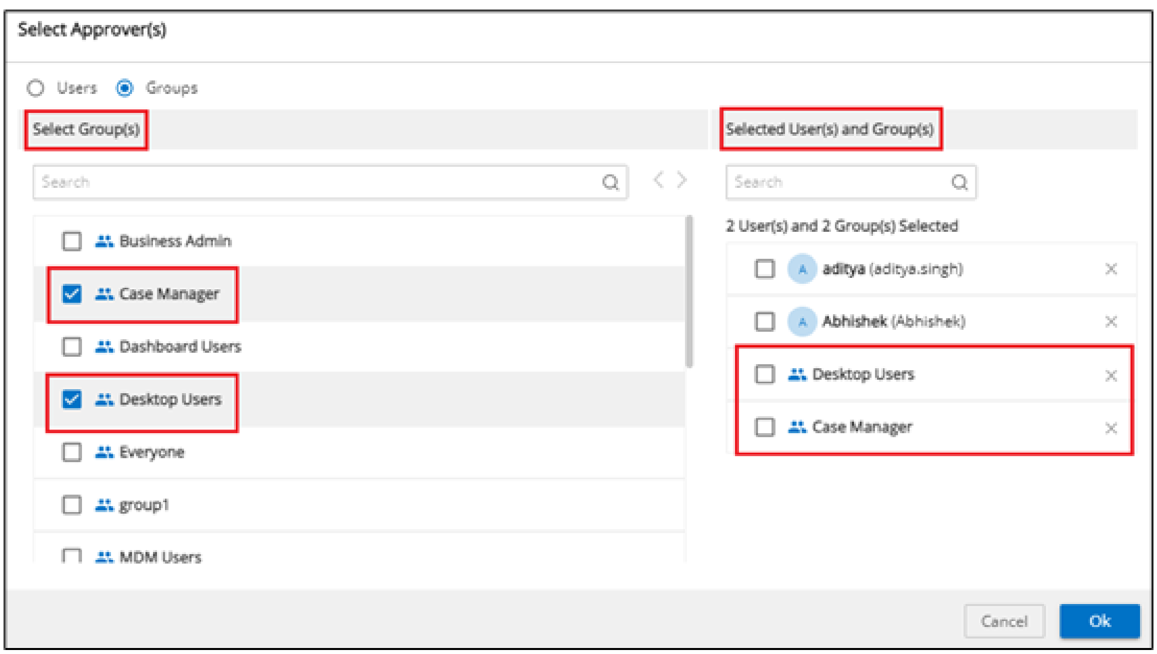
3. Select the checkboxes adjacent to the operations that you want to enable for the maker checker.



4. Select approvers under the Approver's List.
5. Click ellipses ··· to select the approver. The Select Approver(s) page appears.
    - Users: Upon selection, the Select User(s) section appears.
    - Groups: Upon selection, the Select Group(s) section appears.
6. Select the required User(s) or Group(s).
    - For User(s)
        - Use the dropdown to select the users either by User Id or User Name. Alternatively, use the search box to search the user by name or ID. Alternatively, use the sort option to sort the users list by groups.
        - Select the checkbox adjacent to the user name or user ID. The selected user gets added to the Selected User(s) and Group(s) list.



- For Group(s)
  - Select the checkbox adjacent to the group name to it. The selected user gets added to the Selected User(s) and Group(s) list.
    Alternatively, use the search box to search the group by name.

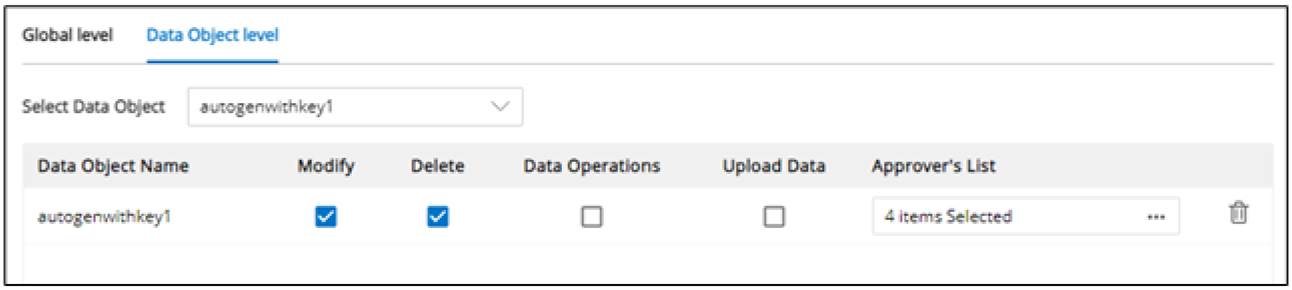


- Use < and > options to move to the previous or next list of users or groups respectively.

- Use the search box present under Select User(s) and Group(s) section to search the selected user or group.
- Click present next to the name of selected user or group to remove the selected user or group.
- Select the checkbox adjacent to the user or group name under Selected User(s) and Group(s) section and then click the delete option to remove the selected user(s) or group(s).

7. Click **Ok** to save the list of selected approvers.

> Use the Cancel option to close the Select Approver(s) page without saving the changes made to the approver's list.



> Use to remove the selected data object from the list.

8. Click **Save** to save changes made to the data object level maker checker. The preferences added successful toast appears.

> Use the Cancel option to close the Maker Checker Preferences dialog without saving the changes.

Managing cache

The **Cache Management** tab allows you to manage the application cache including the memory and file cache. With cache, you can improve the response time and the overall performance of the application.

These are the different operations you can perform in the Cache Management tab:

- **Enabling application cache** — Turn on the **Enable Application Cache** toggle to speed up the performance and efficiency of the application. By enabling the toggle, the application starts using the cached data.

  > Ensure that you turn on the **Enable Application Cache** toggle after completing the application deployment on the production environment.

- **Clearing cache** — Click the **Clear Cache** button to delete the memory and file cache of the application. By default, both the memory and file cache checkboxes are selected and are uneditable.

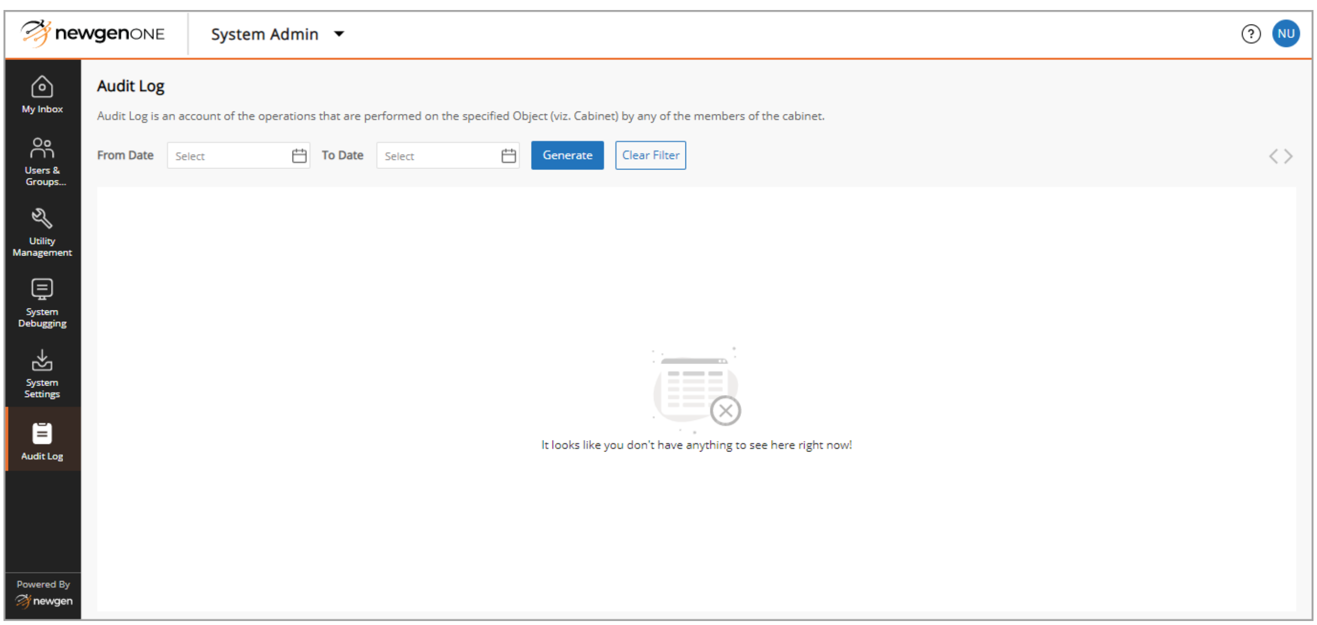
Accessing logs

Audit Log is an account of the operations. It is performed on the specified Cabinet. Also, any members of the cabinet can generate audit logs. The generated log displays the following information:

- Action
- Action done by
- Date and time
- Comments
- Old value
- New value

Perform the below steps to generate *Audit Log*:

1. Sign in to the System Admin Workspace.
2. Click **Audit Log** on the navigation pane. The *Audit Log* window appears.
3. Select the From Date and To Date using the respective calendar icon.



4. Click **Generate**. The log appears for the specified date range.