



NewgenONE

Automation Studio

User Guide

Version: 2024.2

Disclaimer

This document contains information proprietary to Newgen Software Technologies Ltd. User may not disclose or use any proprietary information or use any part of this document without written permission from Newgen Software Technologies Ltd.

Newgen Software Technologies Ltd. makes no representations or warranties regarding any software or to the contents or use of this guide. It also specifically disclaims any express or implied warranties of merchantability, title, or fitness for any particular purpose. Even though Newgen Software Technologies Ltd. has tested the hardware and software and reviewed the documentation, it does not guarantee or imply that this document is error free or accurate regarding any particular specification. As a result, this product is sold as it is and user, the purchaser, is assuming the entire risk as to its quality and performance. Further, Newgen Software Technologies Ltd. reserves the right to revise this publication and make changes in its content without any obligation to notify any person, of such revisions or changes. Newgen Software Technologies Ltd. authorizes no Newgen agent, dealer or employee to make any modification, extension, or addition to the above statements.

Newgen Software Technologies Ltd. has attempted to supply trademark information about company names, products, and services mentioned in this document. Trademarks indicated below were derived from various sources.

Copyright © 2024 **Newgen Software Technologies Ltd.** All Rights Reserved.

No part of this publication may be reproduced and distributed without the prior permission of Newgen Software Technologies Ltd.

Newgen Software, Registered Office, New Delhi

E-44/13

Okhla Phase - II

New Delhi 110020

India

Phone: +91 1146 533 200

info@newgensoft.com

Contents

- Preface 4**
 - Revision history 4
 - About this guide..... 4
 - Intended audience 4
 - Related documents 5
 - Documentation feedback 5
- Introduction 6**
- Getting started 7**
 - Signing in to NewgenONE Automation Studio 7
 - Resetting your password 9
 - Managing cabinets..... 10
 - Exploring NewgenONE Automation Studio interface..... 12
- Working with NewgenONE design tools..... 15**
 - Launching process designer 16
 - Launching interface designer 16
 - Launching report designer..... 16
 - Launching rule builder 17
 - Launching data model designer 17
 - Launching RPA script designer..... 17
- Viewing pinned items..... 18**
- Viewing recent items..... 19**
- Applying activity filters 21**

Preface

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

Revision history

Revision date	Description
November 2024	Initial publication

About this guide

This guide explains NewgenONE Automation Studio and its features. Through this guide, users can understand its functional usability. Automation Studio is a starting point with access to design and development tools. It also explains how to launch the different design tools supported by NewgenONE and view the development updates using the Activity stream.

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



- [Newgen Internal Doc Portal](#), if you are a Newgen employee.
- [Newgen Partner Portal](#), if you are a Newgen partner.

Intended audience

This guide is intended for business analysts, administrators, and developers who design and develop processes and portals for customers' demonstrations and implementations. The user must have a basic knowledge of software systems and low-code programming.

Also, ensure users have sufficient rights to access the NewgenONE Automation Studio and its design tools.

Related documents

The following documents are related to NewgenONE Automation Studio:

- NewgenONE Overview Guide
- NewgenONE Interface Designer User Guide
- NewgenONE Rule Builder User Guide
- NewgenONE Process Designer User Guide
- NewgenONE Data Model Designer User Guide

Documentation feedback

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

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

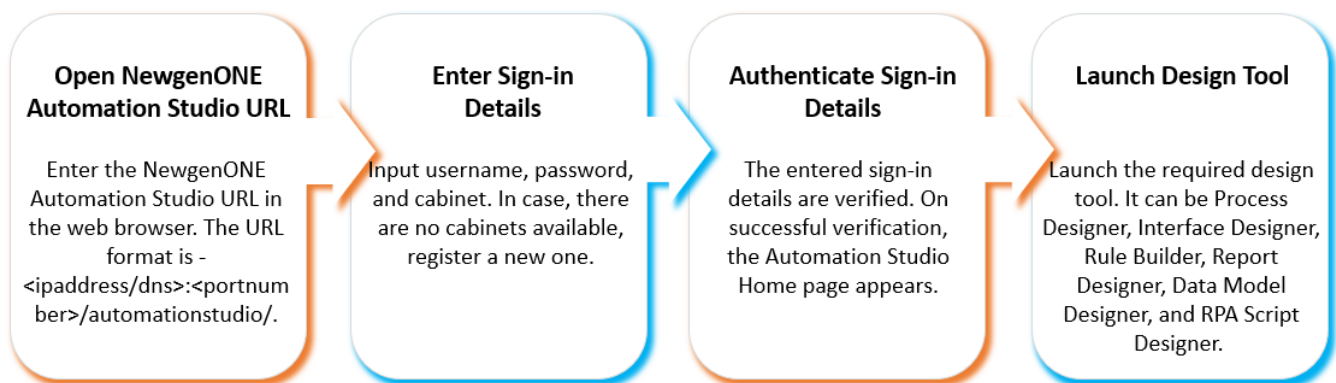
- Document name
- Version
- Chapter, topic, or section
- Feedback or suggestions

Introduction

NewgenONE Automation Studio is a centralized launchpad through which users can access different design tools of NewgenONE seamlessly including Process Designer, Interface Designer, Report Designer, Rule Builder, Data Model Designer, and RPA Script Designer. This minimizes a user's hassle of switching across different design tools within the NewgenONE platform.

The following image describes the steps to launch a design tool using the NewgenONE Automation Studio.

Launching a Design Tool



Getting started

This chapter describes how to get started with NewgenONE Automation Studio.

- [Signing in to the NewgenONE Automation Studio](#)
- [Managing cabinets](#)
- [Exploring NewgenONE Automation Studio interface](#)

Signing in to NewgenONE Automation Studio

Prerequisites

Following are the sign-in prerequisites for NewgenONE Automation Studio:

- Valid user credentials
- Sufficient rights to access NewgenONE Automation Studio

To sign in to NewgenONE Automation Studio, perform the following steps:



In case you are signing in for the first time or registering a new cabinet, ensure to configure the cabinet. To know more about cabinets, see [Managing cabinets](#).

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

Condition	URL format
General	<p><i>http or https://<domain or IP address>:<Port>/automationstudio/</i></p> <p>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.</p> <p>For example:</p> <ul style="list-style-type: none"> • Using a domain name: <i>http or https://sample.com/automationstudio/</i> • Using an IP address: <i>http or https://1XX.1XX.0.X:80XX/automationstudio/</i>
If Single sign-on (SSO) is enabled.	<p><i>http or https://<domain or IP address>:<Port>/newgensso/automationstudio/</i></p> <p>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.</p> <p>For example:</p> <ul style="list-style-type: none"> • Using a domain name: <i>http or https://sample.com/newgensso/automationstudio/</i> • Using an IP address: <i>http or https://1XX.1XX.0.X:80XX/newgensso/automationstudio/</i>

The NewgenONE sign-in page appears.

3. (Optional) To change the locale of all the design tools you launch using Automation Studio, select the required option from the locale dropdown 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 NewgenONE user.
Password	Enter the password associated with the username.
Cabinet	Select the cabinet for storing the data. To manage the cabinet, enter this URL in the browser address bar - <i>http or https://<domain or IP address>:<Port>/automationstudio/config</i> . For more information, see Managing cabinets .
Remember me	It allows you to preserve your sign-in details.
Forgot Password	It allows you to reset your password through the registered email.

5. Click **Login** to continue. The Design Workspace page appears.

Related topic(s)

- [Exploring NewgenONE Automation Studio interface](#)
- [Working with NewgenONE design tools](#)

Resetting your password

To reset your forgotten password, perform the following steps:

1. Click the **Forgot Password?** link on the NewgenONE sign-in page. The Forgot Password dialog appears.



The forgot password functionality works only when the alarm mailer is configured and running on the server.

2. Enter the following details in the corresponding fields:

Field	Description
Username	Enter the name of the NewgenONE user.
Email	Enter the email address associated with the username.

3. Click **Get Reset Link**. A reset link and a set of instructions for resetting the password are shared on your registered email address.
4. Open the reset link. The Reset Password page appears.

5. Enter the new password and re-enter to confirm.
6. Click **Reset Password**. The password gets updated.

Managing cabinets

A cabinet is a centralized unit of data storage for a database. There can be multiple cabinets for a particular database. A cabinet typically stores all the system as well as user-defined data objects and definitions needed for the design tools, object rights management, workspaces, queues, and workitems.


Managing cabinets involves the registration and unregistration of cabinets. In order for users to access a cabinet, they must be a member of that cabinet.



To register a cabinet, perform the following steps:

1. Enter this URL in the browser address bar - *http or https://<domain or IP address>:<Port>/automationstudio/config*. The Manage Cabinets dialog appears.
2. Go to the **Register New Cabinet** tab and enter the following details:

Field	Description
App Server IP	Enter the IP address of the NewgenONE application server.
App Server Port	Enter the port of the NewgenONE application server.
App Server Type	Select the type of the NewgenONE application server. It can be JBossEap, WebLogic, WebSphere, and Wrapper.

3. Click **Connect**, and enter the following details:

Field	Description
Cabinet	Select the name of the cabinet from the dropdown list.  This field shows options based on the entered application server details.
Cabinet Alias	Enter the display name for the cabinet. By default, it picks the value from the Cabinet field.

Field	Description
Site	<p>Select the site name from the dropdown list. A site represents a storage management server (SMS). It serves as a repository for volumes, each consisting of multiple volume blocks.</p> <p> This field shows options based on the chosen cabinet.</p>
Volume	<p>Select the volume from the dropdown list. An image volume lets you group several image-volume blocks where each image-volume block corresponds to a data file, which is a group of one or more data files concatenated.</p> <p> This field shows options based on the chosen site.</p>
Username	Enter the name of the NewgenONE user.
Password	Enter the password associated with the username.
Mobile Enabled	Select to access the cabinet on NewgenONE Workspace for Mobile.

4. Click **Register**.

On a successful connection, the added cabinet now appears in the Registered Cabinets tab.

To unregister a cabinet, perform the following steps:

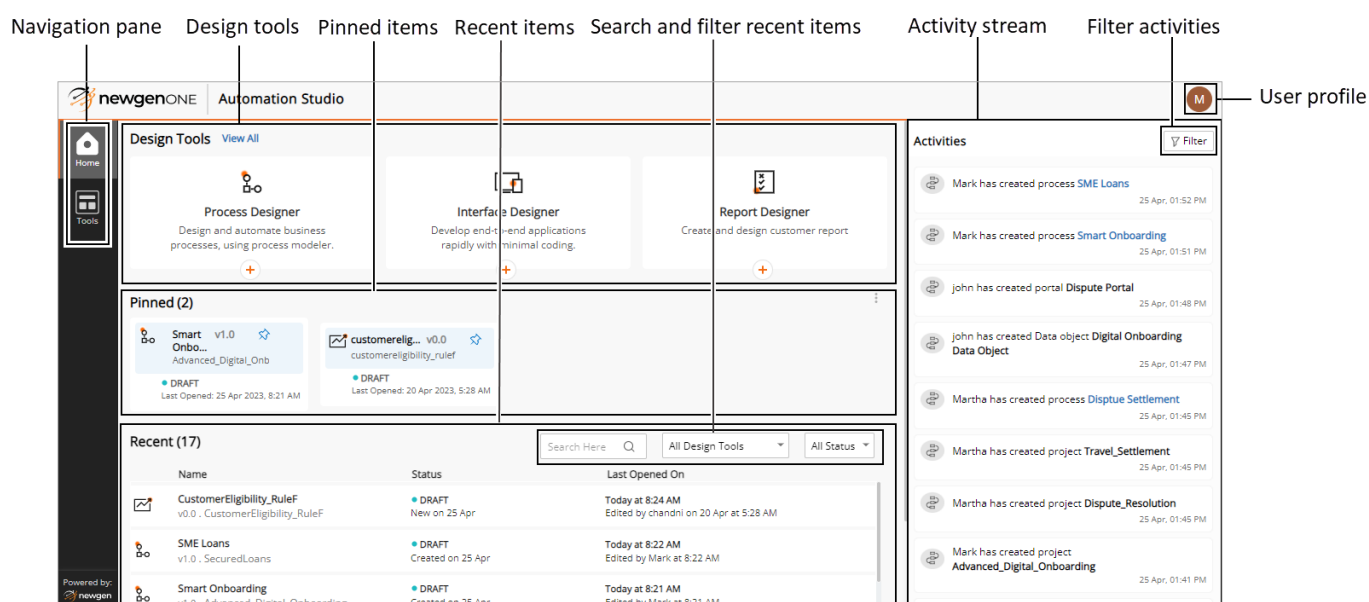
1. Enter this URL in the browser address bar - *http or https://<domain or IP address>:<Port>/automationstudio/config*. The Manage Cabinets dialog appears.
2. Go to the Registered Cabinets tab.
3. Select the cabinet you want to remove, and click **Un-Register**. The Un-register Cabinet dialog appears.
4. Enter your username and password.
5. Click **Proceed**.

The cabinet gets removed.

Exploring NewgenONE Automation Studio interface


On successful sign-in, the NewgenONE Automation Studio Home page appears. It lets you view the pinned and recent tasks, open the design tools, and filter the recent activities.

Furthermore, to navigate through the elements of the automation studio user interface, you can use the Tab key.



The Automation Studio Home page includes the following user interface (UI) elements:

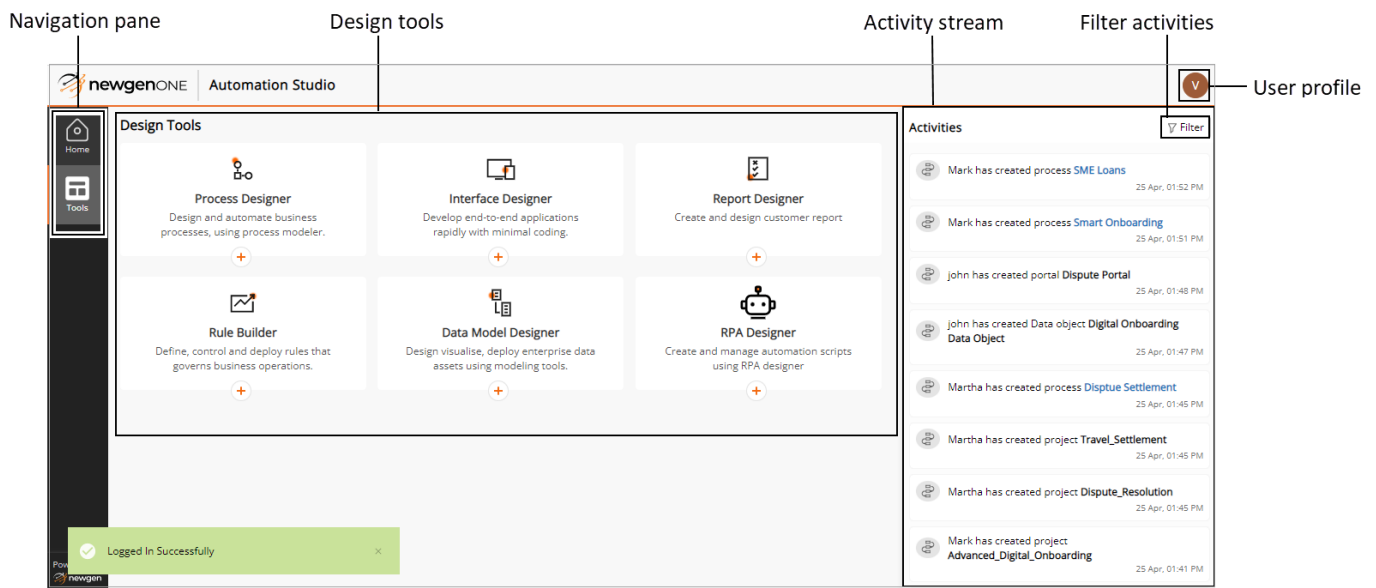
UI element	Description
Navigation pane	<p>Lets you switch quickly between the different tabs available on the pane, which are as follows:</p> <ul style="list-style-type: none"> • Home tab • Tools tab

UI element	Description
Design tools	<p>Allows you to launch the following NewgenONE design tools:</p> <ul style="list-style-type: none"> • Process designer • Interface designer • Report designer • Rule builder • Data model designer • Robotic Process Automation (RPA) script designer <p>By default, only three design tools appear. Click to launch the required design tool. Click View All, and the Tools tab appears. The Tools tab allows you to launch any NewgenONE design tool. For more information, see Working with NewgenONE design tools</p> <div> <p>The RPA Script Designer tile appears only when you have installed the Newgen RPA on your system. For more information, see Newgen RPA Script Designer User Guide.</p> <p>You can view only those design tools for which you have accessibility rights.</p> </div>
Pinned items	Displays pinned items for quick access. For more information, see Viewing pinned items .
Change pinned items view	Lets you change the view of the pinned items using the ellipsis icon  . You can display the pinned items either in the tile or list view.
Recent items	Displays the items that you have recently accessed or worked on. For more information, see Viewing recent items .
Search recent items	Allows you to look for a specific item by typing its name in the search box.
Sort recent items	Allows you to sort the recent items based on their current status. The current status of each design tool item is different.
Activity stream	Displays the latest activities performed on the items.
Filter activities	Lets you filter the activities in the Activity stream based on the artifact type, artifact name, and executioner. To know more, see Applying activity filters .
View online help	Opens the online help for NewgenONE Automation Studio.

UI element	Description
User profile	<p>Displays the current user and cabinet details.</p> <p>To sign out of the Automation Studio, click the user profile and select Log out from the list.</p>

Working with NewgenONE design tools

To launch the NewgenONE design tools, switch to the **Tools** tab using the navigation pane on the left. The design tools include Process Designer, Interface Designer, Report Designer, Business Rule Designer, Data Model Designer, and RPA Script Designer. However, you can also launch specific design tools from the [Home page](#).




The Tools page of the Automation Studio contains the following UI elements:

- Navigation pane
- Design tools
- Activity stream
- Filter activities
- User profile

For more information on these UI elements, see [Exploring NewgenONE Automation Studio interface](#).

Launching process designer


Use any one of the following ways to launch the NewgenONE Process Designer:


- Click the **Process Designer** tile under the Design Tools section. The Process Designer Home page appears on a new browser tab.
- To directly create a process, click the  icon under the **Process Designer** tile and select **Create Process**. The Choose a template page appears on a new browser tab.

 For more information on how to create a process, see *NewgenONE Process Designer User Guide*.

Launching interface designer


Use any one of the following ways to launch the NewgenONE Interface Designer:


- Click the **Interface Designer** tile under the Design Tools section. The Interface Designer Home page appears on a new browser tab.
- To directly create a form, click the  icon under the **Interface Designer** tile and select **Create Form**. The Template Selection page appears on a new browser tab.

 For information on how to create a form, see *NewgenONE Interface Designer User Guide*.

Launching report designer


Use any one of the following ways to launch the NewgenONE Report Designer:

- Click the **Report Designer** tile under the Design Tools section. The Report Designer Home page gets invoked on a new browser tab.
- To directly create a report or scheduler, click the  icon under the **Report Designer** tile and select **Create Report** or **Create Scheduler**, respectively.

 For information on how to create a report or scheduler, see *NewgenONE Business Activity Monitor User Guide*.

Launching rule builder

Use any one of the following way to launch the NewgenONE Rule Builder:


- Click the **Rule Builder** tile under the Design Tools section. The Rule Builder Home page appears on a new browser tab.
- To directly create an entity, rule package, or rule flow, click the  icon under the **Rule Builder** tile and select **Create Entity**, **Create RulePackage**, or **Create RuleFlow**, respectively.



For information on how to create an entity, rule package, or rule flow, see *NewgenONE Rule Builder User Guide*.

Launching data model designer

Use any one of the following ways to launch the NewgenONE **Data Model Designer**:

- Click the **Data Model Designer** tile under the Design Tools section. The Data Model Designer Home page appears on a new browser tab.
- To directly create a data object or template, click the  icon under the **Data Model Designer** tile and select **Create Data Object** or **Create Template**, respectively.



For information on how to create data objects and templates, see *NewgenONE Data Model Designer User Guide*.

Launching RPA script designer


Click the **RPA Script Designer** tile under the Design Tools section. The RPA Script Designer Home page appears on a new browser tab.



For information on how to create a script, see *Newgen RPA Script Designer User Guide*.

Viewing pinned items

The Pinned section shows the pinned items across all the design tools. You can pin an item you work the most on. This helps in easier navigation and saves your time. A pinned item appears along with its name, version, state, and the last modified time. By default, you can view only four pinned items. To see all the pinned items, click **View all**.

Click the ellipsis icon  to change the view for the pinned items. It can be **Tile View** or **List View**.

Viewing recent items

The Recents section displays a list of recently created, worked, or accessed items across the design tools. This makes it easier to access the items you often work on. Apart from this, you can view the state, creation date, modifier name, and the recently accessed time for the item.

You can also filter the items based on their current status. The current status of each design tool item is different.

Designer tool item	Status
Rule Builder	You can filter the recently accessed rule packages and rule flows based on the following statuses: <ul style="list-style-type: none">• All Status• Draft• Deployed
Process Designer	You can filter the recently accessed processes based on the following statuses: <ul style="list-style-type: none">• All Status• Draft• Deployed• Enabled
Data Model Designer	You can filter the recently accessed data objects based on the following statuses: <ul style="list-style-type: none">• All Status• Pending• Approved
Interface Designer	You can filter the recently accessed portals based on the following statuses: <ul style="list-style-type: none">• All Status• Draft• Published

Designer tool item	Status
Report Designer	<p>You can filter the recently accessed reports based on the following statuses:</p> <ul style="list-style-type: none">• All Status• Good• Average• Critical• Blocked

Applying activity filters

The Activity stream on the right displays the recent activities performed by users in different design tools. This stream is also available in each design tool showing activities only specific to that tool. Here, you can access the artifacts from the stream based on your rights and additionally apply filters based on the artifact type, name, or executioner.

To apply a filter on the latest activities, perform the following steps:

1. Click **Filter** on the Activities pane of the Home page. The Activity Filters dialog appears.
2. Enter the following filter criteria in the dialog:

Filter criteria	Description
Artifact Type	Select a suitable type for the artifact. Types of artifact can be: process, project, portal, report, report category, rule package, rule flow, and data object.
Artifact Name	Select the name of the artifact from the dropdown list.
Action Performed By	Select the name of the executioner who performed the action.

3. Click **Apply** to view the results.