NewgenONE

Process Designer

User Guide

Version: 2024.2

Contents

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Preface

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

Revision history

Revision date	Description
November 2024	Initial publication

About this guide

This guide explains how to configure simple and complex business processes using a low-code method. It also explains how to use the process designer and its supported features with meaningful business use cases. This guide provides step-by-step procedures for creating, designing, and deploying a process. Furthermore, this guide also contains the configuration details of each workstep available in the process designer.

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 process designers and business users who want to configure simple and complex customized processes using a low code method (visual approach). It is also for the users who want to implement mapping of intricate process flows onto a software automation and processing platform, that is NewgenONE.

Ensure that users have sufficient rights to access NewgenONE Process Designer and its functionalities.

Related documents

The following documents are related to NewgenONE Process Designer:

- NewgenONE Overview Guide
- NewgenONE Automation Studio User Guide
- NewgenONE Interface Designer User Guide
- NewgenONE Rule Builder User Guide
- NewgenONE Data Model Designer User Guide

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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 Process Designer is a tool for designing and modeling business processes. It provides an easy-to-use graphical interface for developing business processes in a flow chart fashion.

A process is a series of tasks carried out in sequential order to achieve a target. For example, a bank account opening process is composed of the following tasks:

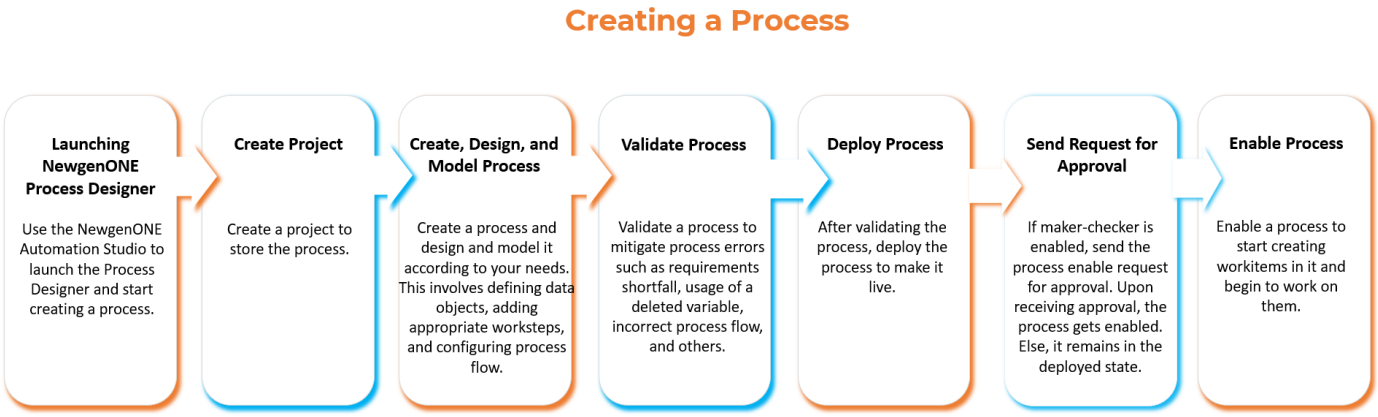
1. Scanning of submitted customer application forms to open a bank account.
2. Manual data entry into the systems through the scanned image of the application form by the bank employees.
3. Application form approval from the bank manager to open a bank account.
4. On manager approval, various documents including bank account number, debit card, and cheque book gets dispatched to the customer.

In this guide, you will understand how to design a process in a step-by-step procedure using the NewgenONE Process Designer. The concept of designing a process is simple.

The following are the key features of NewgenONE Process Designer:

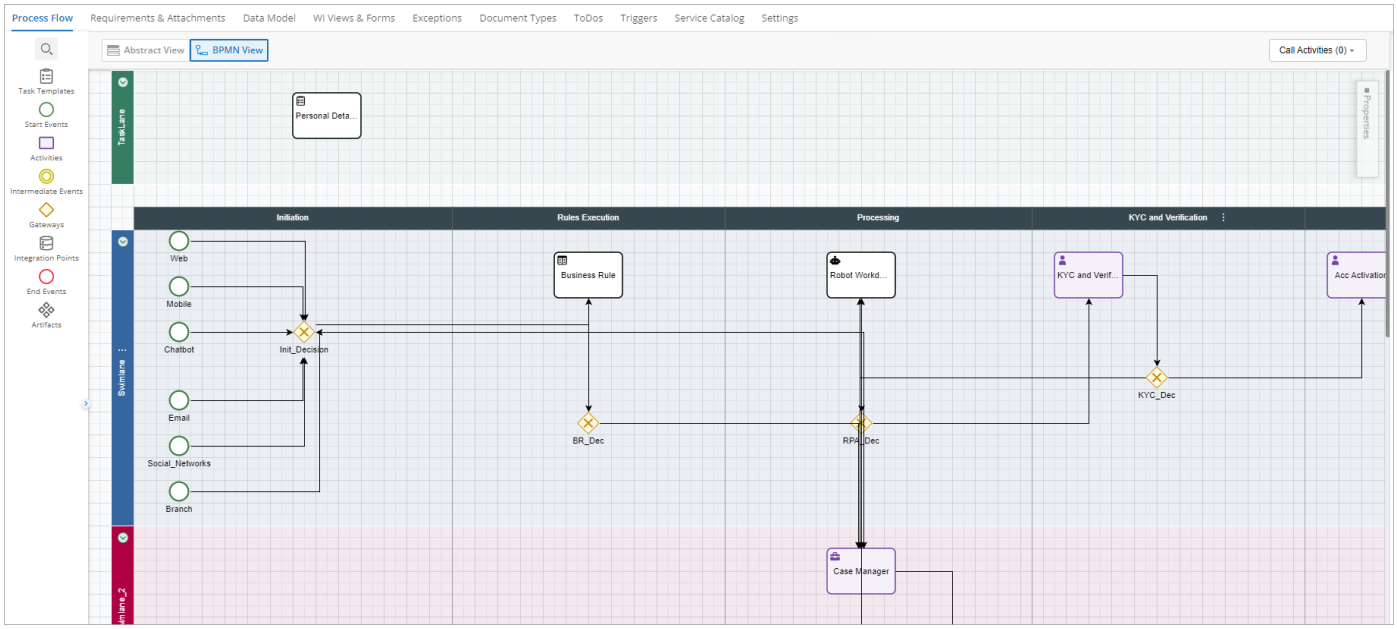
- Provide an easy-to-use graphical interface to create and model processes.
- Design processes with minimum knowledge of programming.
- Support the creation of processes with worksteps in series, parallel, or both.
- Effective management of relationships between worksteps through rules and conditions.
- Generate logs to check the various actions performed on a process.
- Provide case management capability for better decision-making.
- Create templates to save your time and effort in process creation.

The following image describes the steps to create a process in NewgenONE Process Designer.



Understanding process diagram

A process diagram consists of start events, intermediate events, gateways, integration points, tasks, and lanes, which help to determine the sequence flow of a process. For example, the following process diagram describes how a bank creates an account for a customer.



Process Symbols and Notation

NewgenONE Process Designer uses the below symbols to indicate the basic elements of a process.

Symbol	Element	Description
	Start Event	It indicates the starting point of the process flow.
	Task	It is an atomic activity within a process. It represents a piece of work in a process, which cannot be broken down into a finer level of detail.
	Intermediate Event	The events that occur between the start and the end event. Such events affect the flow of the process, but do not initiate the start or end of the process.
	Gateway	It controls the divergence and convergence of sequence flow in a process. For example, branching, merging, forking, and joining paths.
	End Event	It indicates the exit point of the process flow.
	Lane	It helps to organize and categorize the activities within a process flow diagram.

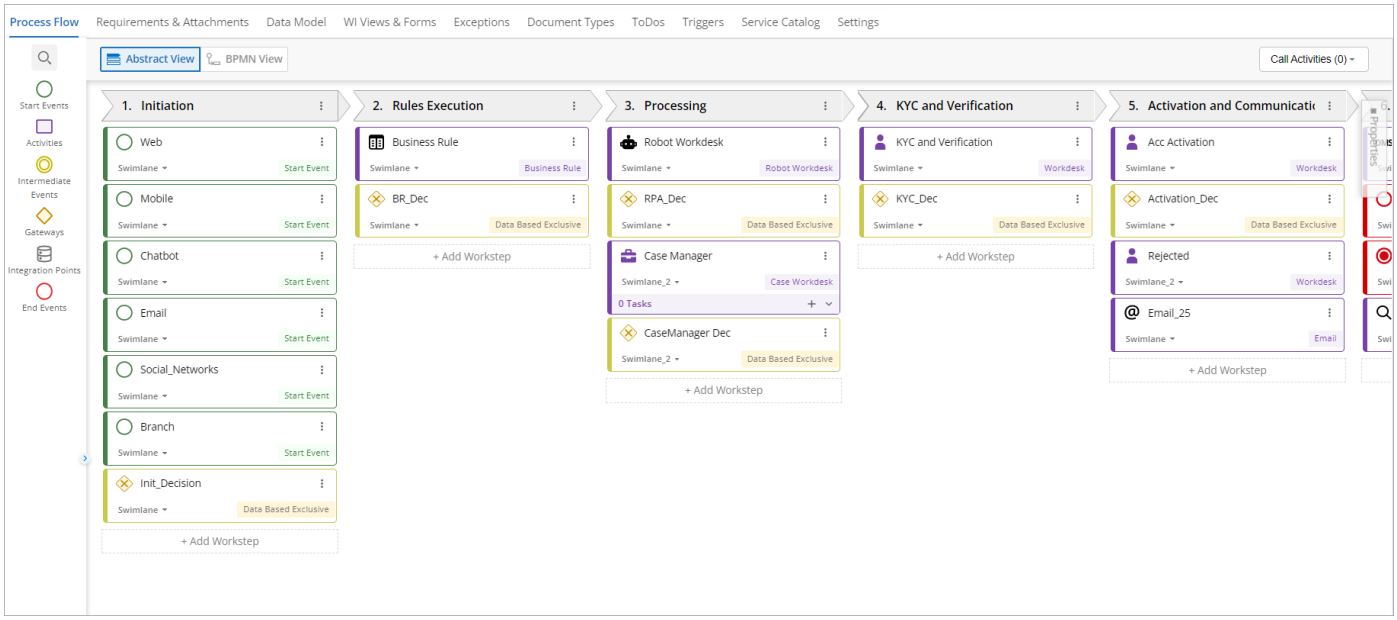
Types of views

A view is a graphical representation of the process. Typically, there are two types of views supported by NewgenONE Process Designer.

- Abstract view
- BPMN view

Abstract view

The Abstract view is the simplest mode for designing a process. In an abstract view, the designing pane is vertically divided into segments, and all the activities linked to these segments are vertically aligned in that column.

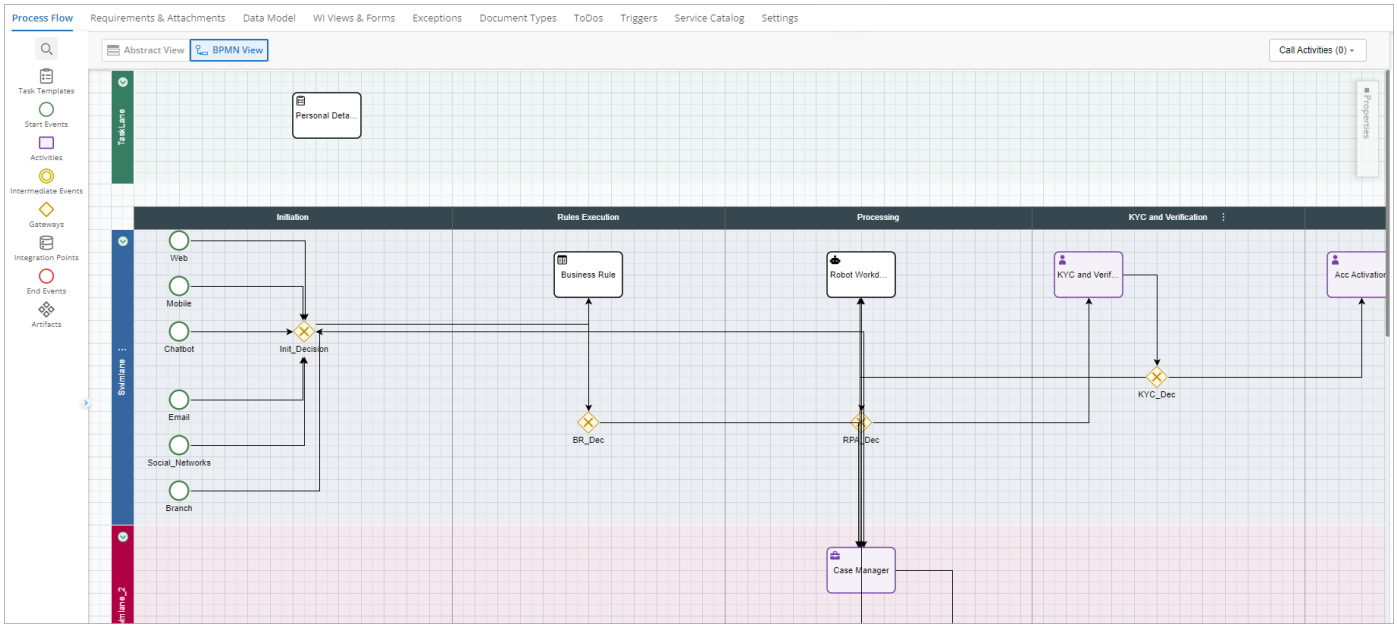


These are the different types of worksteps supported in Abstract view:

- Start events
- Activities
- Intermediate events
- Gateways
- Integration points
- End events

BPMN view

The Business Process Modeling Notation (BPMN) view of the process provides a platform to design a process for bridging the gap between the business process design and process implementation. BPMN view provides a toolbox that has all the activities as per the basic BPM notations. This toolbox aids in designing a complete process by the user.



These are the different types of worksteps supported in BPMN View:

- Task templates
- Start events
- Activities
- Intermediate events
- Gateways
- Integration points
- End events
- Artifacts

Types of worksteps

NewgenONE Process Designer offers a wide range of worksteps for both manual and automated processing. Each workstep has its own set of functionalities and significance.

The design area of the process designer is divided into tasklane and swimlane.

- TaskLane allows you to define adhoc activities for a process. You can make these tasks optional or mandatory as required. But many tasks are associated with a single workdesk. Tasklane is the standard lane available in the system.

> You cannot rename or move a tasklane in a process.

- SwimLane is a graphical container for partitioning a set of activities from other activities.

The different types of worksteps supported by NewgenONE Process Designer are described in the following table:

Workstep	Description
Task templates	It allows you to create adhoc activities or tasks. These tasks are defined and assigned to the users at runtime.
Start events	It indicates the starting point of the process.
Activities	It allows you to define tasks within a process. Use activities when the work in the process cannot be broken down to a finer level of detail.
Intermediate events	It is the intermediate step between the start and end events. The process cannot start or end at these steps.
Gateways	It is used to control how the process flows through sequence flow as they converge and diverge within a process.
Integration points	It lets you interact with other applications.
End events	It indicates the ending point of the process.
Artifacts	It allows you to provide additional information about the process.

Getting started with NewgenONE Process Designer

This chapter describes how to get started with NewgenONE Process Designer:

- Accessing process designer
- Exploring NewgenONE Process Designer interface

Accessing NewgenONE Process Designer

To access NewgenONE Process Designer, you must first log in to NewgenONE Automation Studio using the registered username and password. On successful sign-in, the Design Workspace home page appears.

To know how to sign in to Automation Studio, see the *NewgenONE Automation Studio User Guide*.

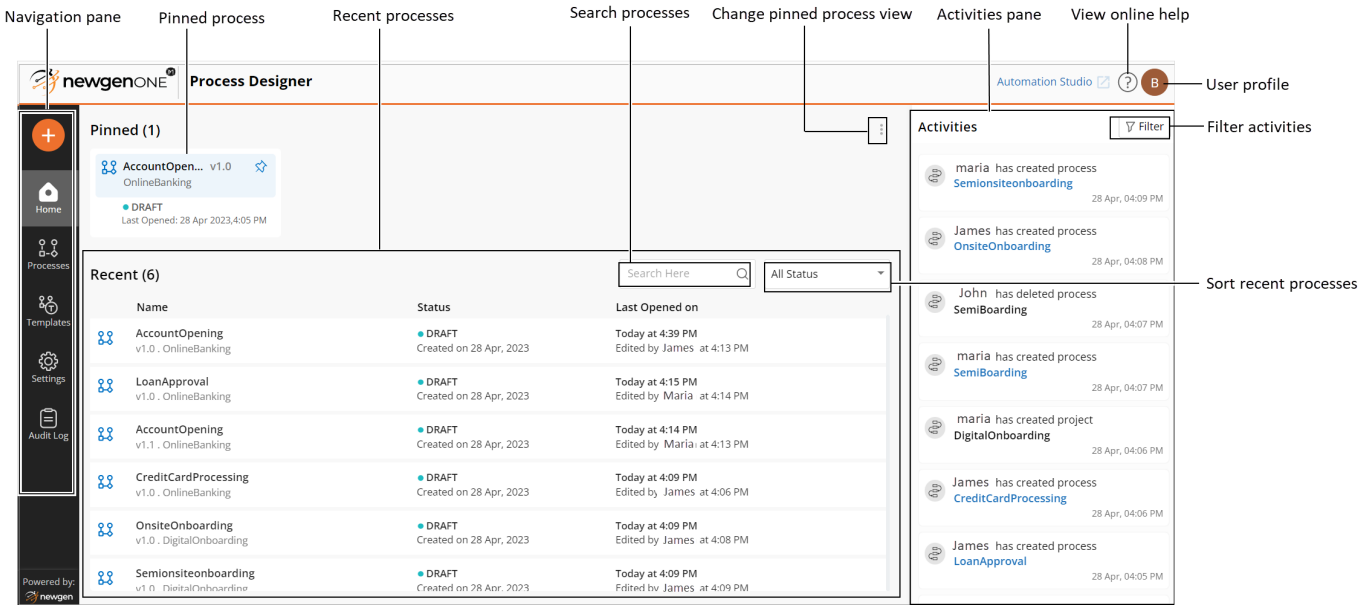
Use any of the following way to launch the NewgenONE Process Designer:

- Click the **Process Designer** tile under the Design Tools section. The Process Designer gets invoked on a new browser tab.
- To create a process, click the + icon under the **Process Designer** and select **Create Process** for creating a process directly.
  For more information, see Creating process.

Exploring NewgenONE Process Designer interface

On accessing the process designer, the Home page appears by default. The Home page consists of a navigation pane on the left for easy navigation between the tabs. On the right, an Activities stream appears that shows the latest activities performed on the processes. Apart from this, you can see the pinned and recently updated processes.

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



The NewgenONE Marvin logo only appears if its engine settings are registered and configured in the NewgenONE OmniDocs. For more information, refer to the *NewgenONE OmniDocs 11.0 SP2 Administration Guide*.

The Home page of the Process Designer includes the following user interface (UI) elements:

Element	Description
Navigation pane	Lets you switch quickly between the different tabs available on the pane, which are as follows: • Home tab • Processes tab • Templates tab • Settings tab • Audit Log tab • Process Level APIs tab
Pinned processes	Displays pinned processes for quick access. For more information, see Pinning process.
Change pinned process 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 processes	Displays the processes that you have recently accessed or worked on.
Search recent processes	Allows you to look for a specific item by typing its name in the search box.
Sort recent processes	Allows you to sort the recent items based on their current status. A process can be in the draft, deployed, deployed (checked-out), enabled, and enabled (checked-out) status.
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.
User profile	Displays the signed-in user and cabinet details. To log out of the Process Designer, click the user profile and select **Log out** from the list.

Applying activity filters

The Activities stream on the right displays the recent activities performed on the processes registered in the cabinet. Here, you can apply filters on the activities based on the artifact type, artifact name, and 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. It can either be a process or project.
Artifact Name	Select the name of the artifact from the dropdown list. This list varies depending on the chosen artifact type.
Action Performed By	Select the name of the executioner from the dropdown list.

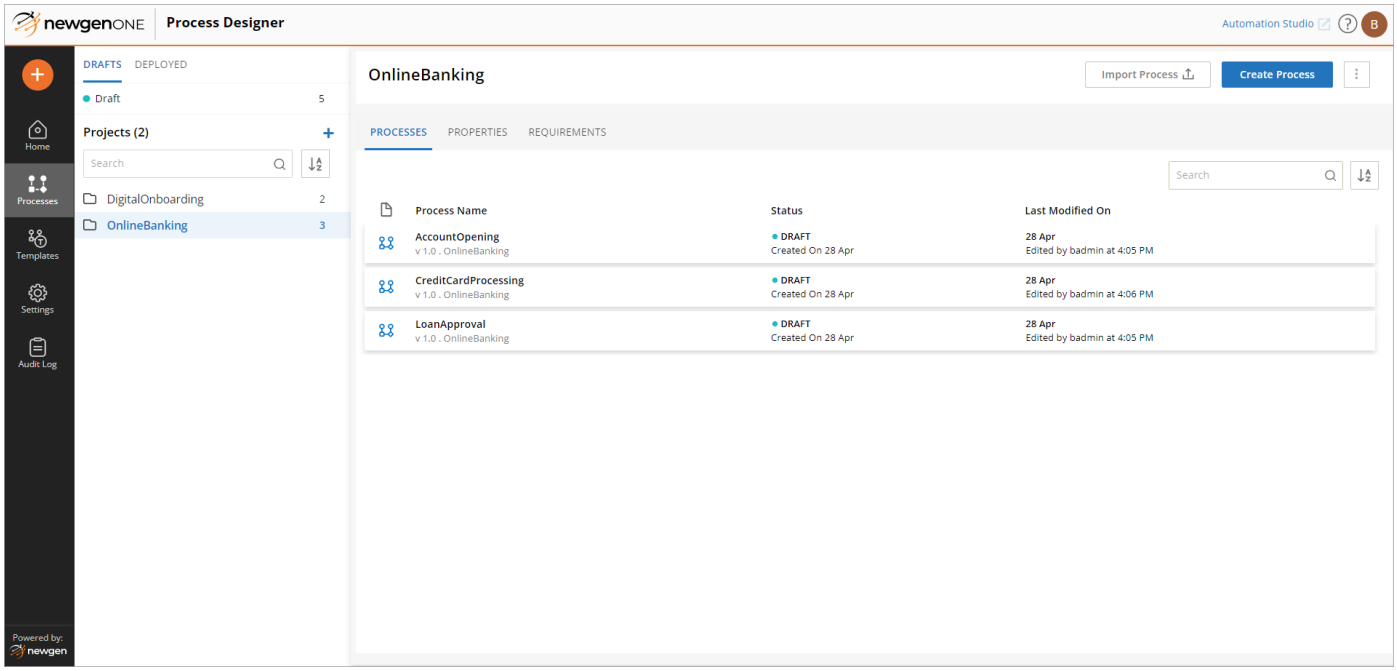
3. Click **Apply** to view the results.

Working with processes

The Processes tab enables you to view, create, and manage the projects and processes in the chosen cabinet. A process is a series of worksteps carried out to accomplish a task. Before creating a process, you need to create a project where you can store more than one process.

Typically, there are two statuses of processes - draft and deployed. Draft processes are those that are awaiting deployment. While, deployed processes are those that are involved in ensuring the working of new processes in their environment, including configuration, running, and testing. You can view these processes on the Projects pane on the left.

The Projects pane displays only those projects for which you have access rights. This pane consists of two tabs, which are Drafts and Deployed. Navigate to the Drafts tab to view those projects that contain draft processes. Else, switch to the Deployed tab to view those projects that contain deployed processes. Both these tabs also show the overall process count and the number of processes against each project. When you select a project, you can view its available processes in the section next to the Projects pane. You can also define the project-related properties and requirements in that section.



These are the various operations that you can perform on the Processes page:

- View projects and processes.
- Create projects and processes.
- Search for a particular project by typing the project name in the search box.
- Sort the projects in chronological order.
- Define project properties and requirements.
- Import processes.
- Rename and delete projects

Reference(s)

- Creating project
- Creating process
- Viewing processes
- Defining project properties

Creating project

To create a project, perform the following steps:

1. On the Processes page, click the + icon against the Projects pane. Alternatively, click the  icon and select **Create Project**. The Project Creation dialog appears.
2. Enter the following details in the dialog:

Field	Description
Name	Enter the name of the project.
Add Description (Optional)	Provide additional information about the project.

3. Click **Create Project**.
   The created project now appears under the Draft tab of the Projects pane.

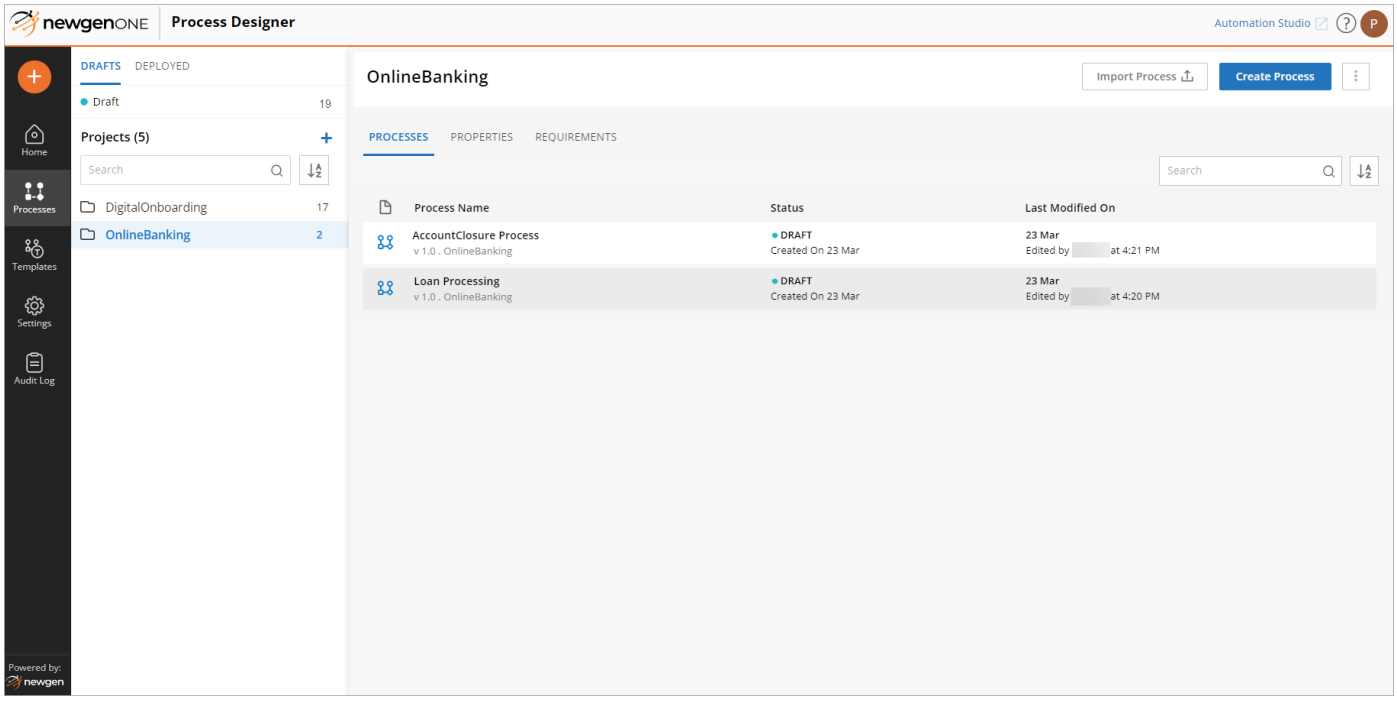
Defining project properties

On successful creation of a project, you can define the project properties and add processes to it. When you select a project from the Projects pane, you can define the project settings and view its related processes.

- Viewing processes
- Viewing and modifying project properties
- Defining project requirements

Viewing processes

The Processes tab lets you view the available processes of the chosen project. You can also see the current status and the latest modified date of the processes.

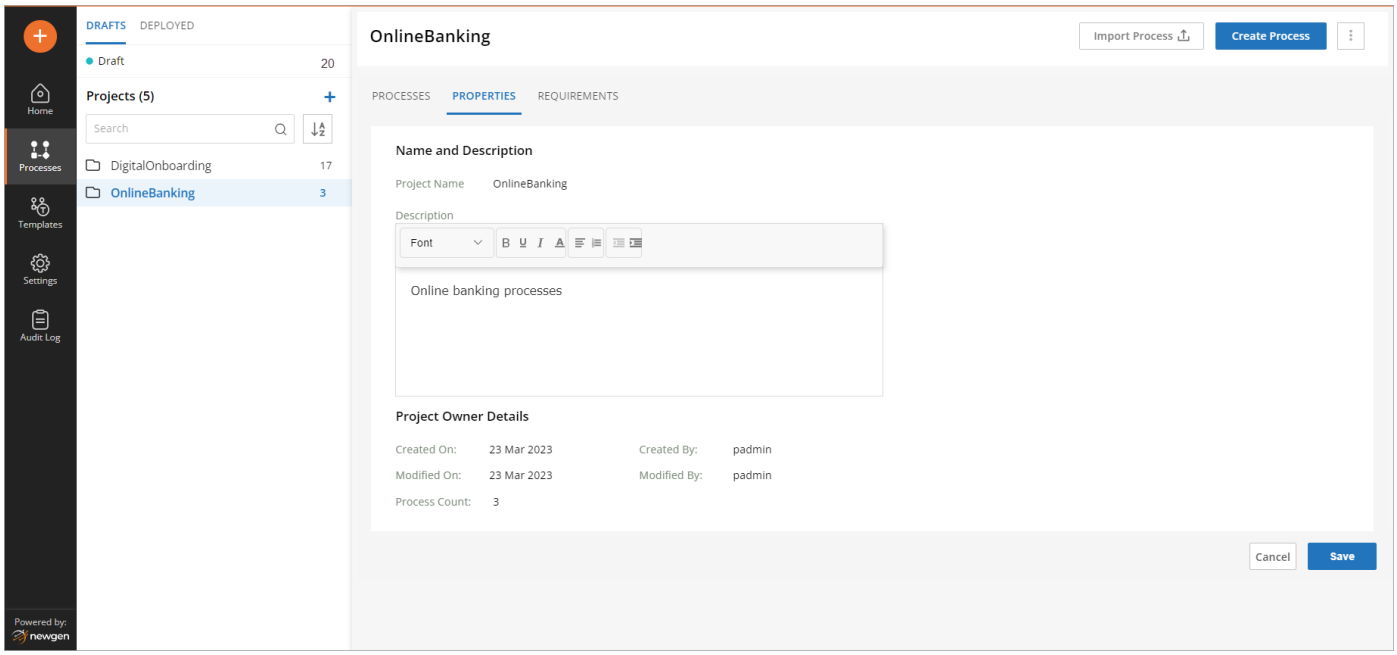


On the Processes page, use the search box to find a particular process in the list. You can also sort the processes based on the following factors and arrange them in chronological order using the **Sort** button:

- Last modified by me
- Last modified
- Name

Viewing and modifying project properties

On the Properties page, you can view and modify the project-related properties. These properties include the name, description, creation date, modified date, creator name, and modifier name of the chosen project.



However, you can only modify the description for the project and apply text and font styles to it.

Defining project requirements

The Requirements tab lets you define the various requirement for the currently opened project. The requirements defined in this tab are applicable to all the processes in this project. Furthermore, it also enables you to create a hierarchy to display project requirements up to three levels.

The Requirements tab also lists the global-level requirements, if any.

For example, you can define the start date, scope, and project environment in the requirements section.

To add a requirement section, perform the following steps:

1. In the Requirements Section tab, click **Add Section**. The Add a new Section dialog appears.
2. Enter the section name and add a description, if any.
3. Click **Add & Close** to add the section and close the dialog. To add another requirement section, click **Add Another**.
   On successful addition, you can add a subsection, modify, or delete the requirement section using the corresponding add, edit, or delete icons.

Creating process

To create a process, perform the following steps:

1. On the Processes tab, select the project where you want to add a process.
2. Click **Create Process** in the upper-right corner of the page. Alternatively, click the icon and select **Create Process**. The Choose a template page appears.
   However, if the NewgenONE Marvin feature is enabled, then the Create a Process page appears consisting of two sections — Generate using NewgenONE Marvin and Choose a Template. Under the Choose a Template, select any of the templates using the corresponding **Use Template** link or click **View all templates**.
   Furthermore, you can use the **Skip to Create Manually** button to create a process from scratch.
3. Select the template category given in the right pane. You can select any from the prebuilt templates or user-defined templates. For information on how to create a template, see Working with templates.

   If the NewgenONE Marvin functionality is enabled, then the **Create Using Marvin** button appears on the upper-right corner of the page. You can click **Create Using Marvin** to generate a process using NewgenONE Marvin. For more information, see Creating process with NewgenONE Marvin.

4. Click **Select this template** to choose an existing template, or click **Create from Scratch** to create a new process. The next page appears where the **Name of Project** is pre-filled based on your project selection.
   However, if you created the process using the icon, then you need to specify the project name. In this case, you also get an option to add a new project.

   If the NewgenONE Marvin functionality is enabled, then the **Create Using Marvin** button appears on the upper-right corner of the page. You can click **Create Using Marvin** to generate a process using NewgenONE Marvin. For more information, see Creating process with NewgenONE Marvin.

5. Enter the **Name of Process**.
6. Then, click **Create**. The Process Modeling page appears.
   For more information, see Designing process.

Creating process with NewgenONE Marvin

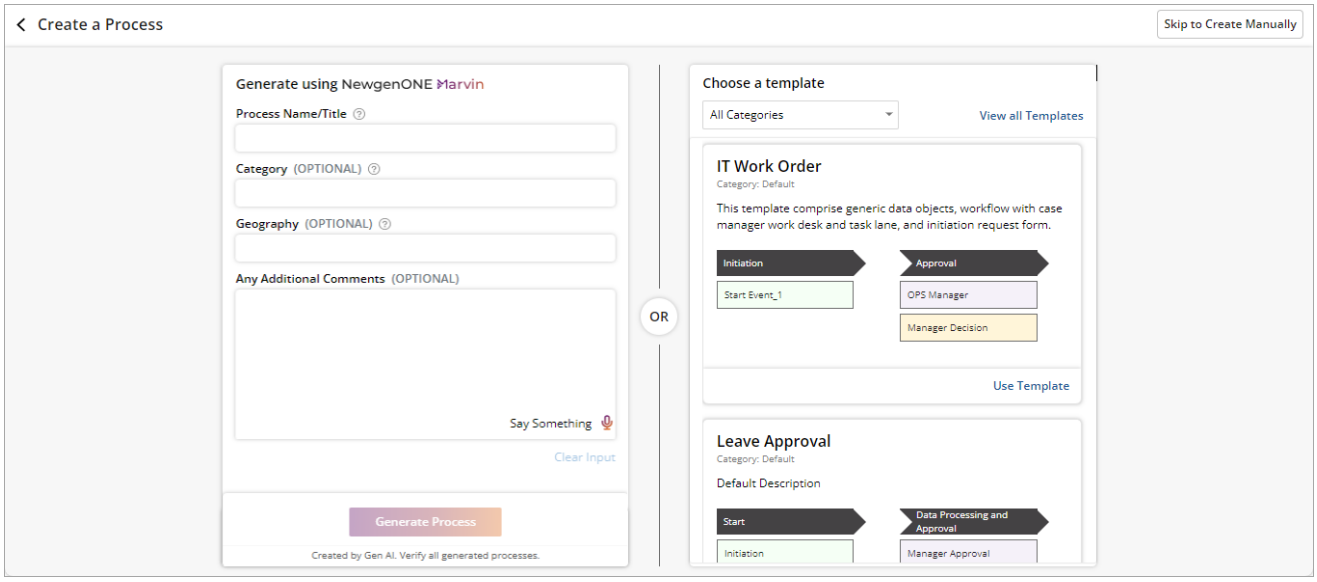
NewgenONE Marvin is a generative artificial intelligence (AI) that understands and generates a preliminary process outline based on your input. This preliminary outline illustrates the basic structure of the process, indicating the sequential flow of different activities and the various key elements involved in the process creation, such as the data model and data fields, exceptions, and todos. You can further modify the process structure depending on your business requirements. This way, NewgenONE Marvin speeds up the process design phase, resulting in a significant reduction in your effort and time to create a process.

Let's suppose, an organization wants to create numerous processes for the human resources (HR) department, such as recruitment and onboarding, payroll processing, performance management, employee training, and others. To speed up its process design phase, the organization can use the NewgenONE Marvin feature to generate preliminary outlines for the multiple processes in the shortest time possible. This saves time and effort, compared to manual creation where you need to create the process from scratch.

To use NewgenONE Marvin in Process Designer, register and configure its engine settings in NewgenONE OmniDocs.
For more information, refer to the *NewgenONE OmniDocs 11.0 SP2 Administration Guide*.

To create a process using NewgenONE Marvin, follow the below steps:

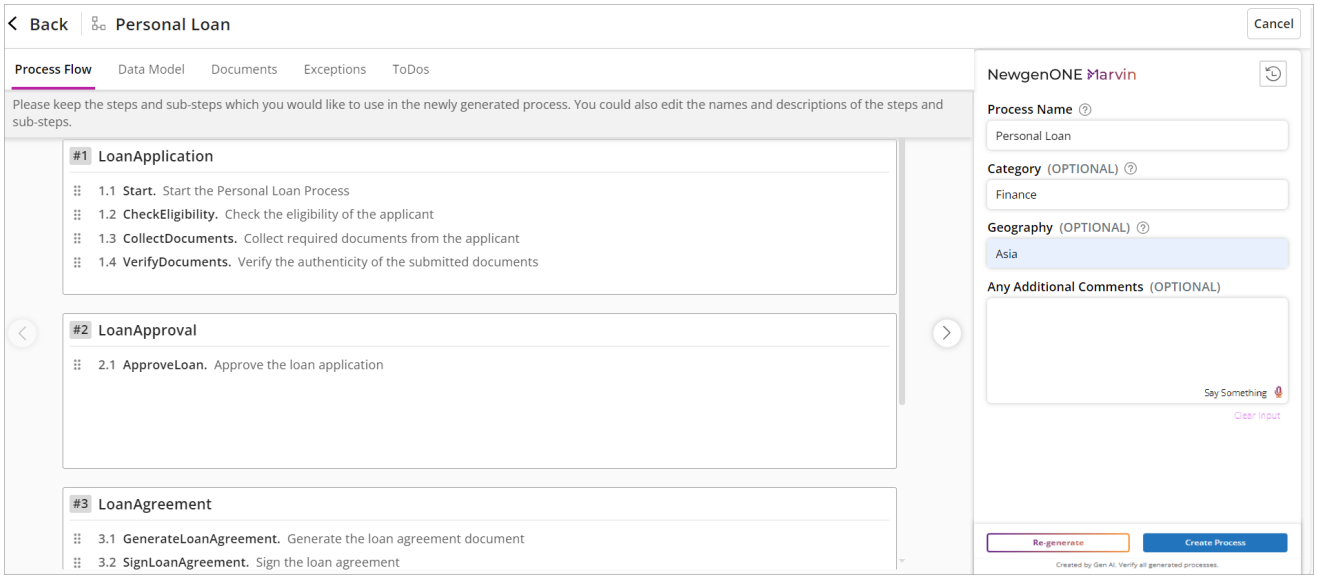
1. On the Processes tab, select the project where you want to add a process.
2. On the upper-right corner of the page, click **Create Process**. Alternatively, click the icon and then select **Create Process**.
   The Create a Process page appears and consists of two sections — Generate using NewgenONE Marvin and Choose a template. Furthermore, you can use the **Skip to Create Manually** button to create a process from scratch. For more information, see Creating process.



3. In the Generate using NewgenONE Marvin section, enter the following information in the corresponding fields:

Field	Description
Process Name/Title	Enter the process name. Ensure the name of the process is simple and precise. For example, gold loan, personal loan, invoice approval, and others.
Category	Enter a suitable category name. A category classifies the process workflows based on their shared functionalities and characteristics. For example, Finance, Information Technology (IT), Banking, and others.
Geography	Enter a suitable geographical location for the process. Geography helps to design the process workflow specific to that location or region. For example, Europe, North America, Asia, and others.
Any Additional Comments	You can add additional comments to create a process by either typing or using the microphone icon to speak your requirements. Once you have finished speaking, click the microphone icon again to stop the recording. Your recorded inputs appear in the Any Additional Comments box. To remove all inputs at once, click **Clear Input**. • The speech-to-text functionality is only available when accessing NewgenONE over a secure HTTPS connection. • The speech-to-text functionality is only supported in the English language.

4. Click **Generate Process**.
   NewgenONE Marvin takes a few seconds to design the process and its required artifacts, based on your inputs. A new page appears displaying the generated process that contains the following tabs — Process Flow, Data Model, Documents, Exceptions, and Todos.



Tab	Description
Process Flow	This tab lists the different worksteps involved in the process creation with their sequential order, type, and description. Here, these worksteps might be arranged in one segment altogether, or in different segments for better categorization. You can also drag a workstep to change its position within a segment. For more information, see Types of worksteps.

Tab	Description
Data Models	This tab lists the data models generated using NewgenONE Marvin for the given process. Each data model is represented in a separate table that further contains the variable names, variable descriptions, and their data types. • To delete an unnecessary data model, click **Delete** on the upper-right corner of the data object table. • To delete an unnecessary variable, click the delete icon next to the required variable name in the data object table. If the process structure contains only one data model, it gets mapped to the external variables on process creation. However, if there are multiple data models, you can view them in the Basic Variables tab as complex data objects. For more information, see Data Models.
Documents	This tab lists the documents generated using NewgenONE Marvin for the given process. Here, it lists the document names with their description. You can also delete an unnecessary document using the corresponding delete icon. Once you create the process, you can then associate the document with the required workstep. For more information, see Document types.
Exceptions	This tab lists the exceptions generated using NewgenONE Marvin for the given process. Here, it lists the exception names with their description. You can also delete an unnecessary exception using the corresponding delete icon. Once you create the process, you can then associate the exception with the required workstep. For more information, see Exceptions.
ToDos	This tab lists the todo items generated using NewgenONE Marvin for the given process. Here, it lists the exception names with their description. You can also delete an unnecessary todo item using the corresponding delete icon. Once you create the process, you can then assign todo rights on the required worksteps and define rules for the todo items. For more information, see ToDos. On successful process creation, the type of these todo items is set to Mark.

On the right, the NewgenONE Marvin pane appears where you can view your specified inputs in the respective fields. However, you can also modify these field values to re-generate the process. For more information, see Regenerating a process.

5. Click **Create** to confirm.
   The Basic Details dialog appears.
6. Enter the following information in the corresponding fields:

Field	Description
Name of Project	The value for this field is prefilled by default. In case you created the process using the  icon. Then, select the project name from the dropdown list. You can also create a new project by selecting the **+ Add Project**.
Name of Process	Enter the process name to create in the Process Designer.

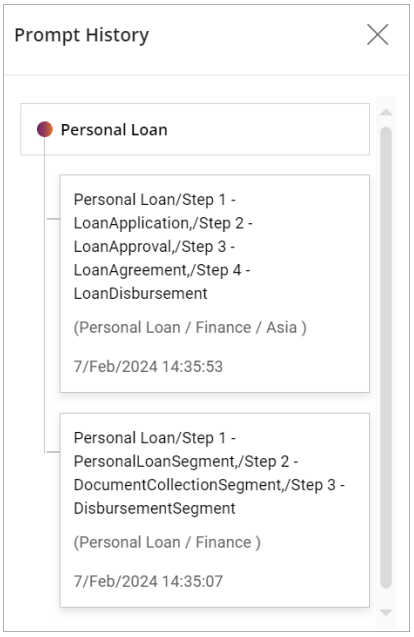
The Process Modeling page appears. You can now modify the process based on your business requirements.

If you accidentally signed out from NewgenONE while creating a process using NewgenONE Marvin. Then, in such a case, if you click **Create process** after re-signing into NewgenONE, a Resume Session dialog appears. Click **Yes, Continue** to resume the previous session. Else, click **Start new session**. Furthermore, the previous session history gets lost on starting a new session.

Viewing prompt history

Process Designer saves the different versions of the preliminary process outlines using NewgenONE Marvin for a specific session. You can view the process history using the Prompt History icon on the upper-right corner of the NewgenONE Marvin pane. Process Designer can store up to 50 different versions of process outlines generated using NewgenONE Marvin.

On the NewgenONE Marvin page, click the **Prompt History** icon. The Prompt History lists process structure generated using NewgenONE Marvin in chronological order with time details.



Prompt history gets lost once the process is created successfully.

Each new process structure is represented in a separate box with the process name, category name, and steps. You can select the required version to restore the desired process.

Regenerating a process

NewgenONE Marvin allows you to regenerate a process based on existing or new inputs. This helps in enhancing the generated current process outline.

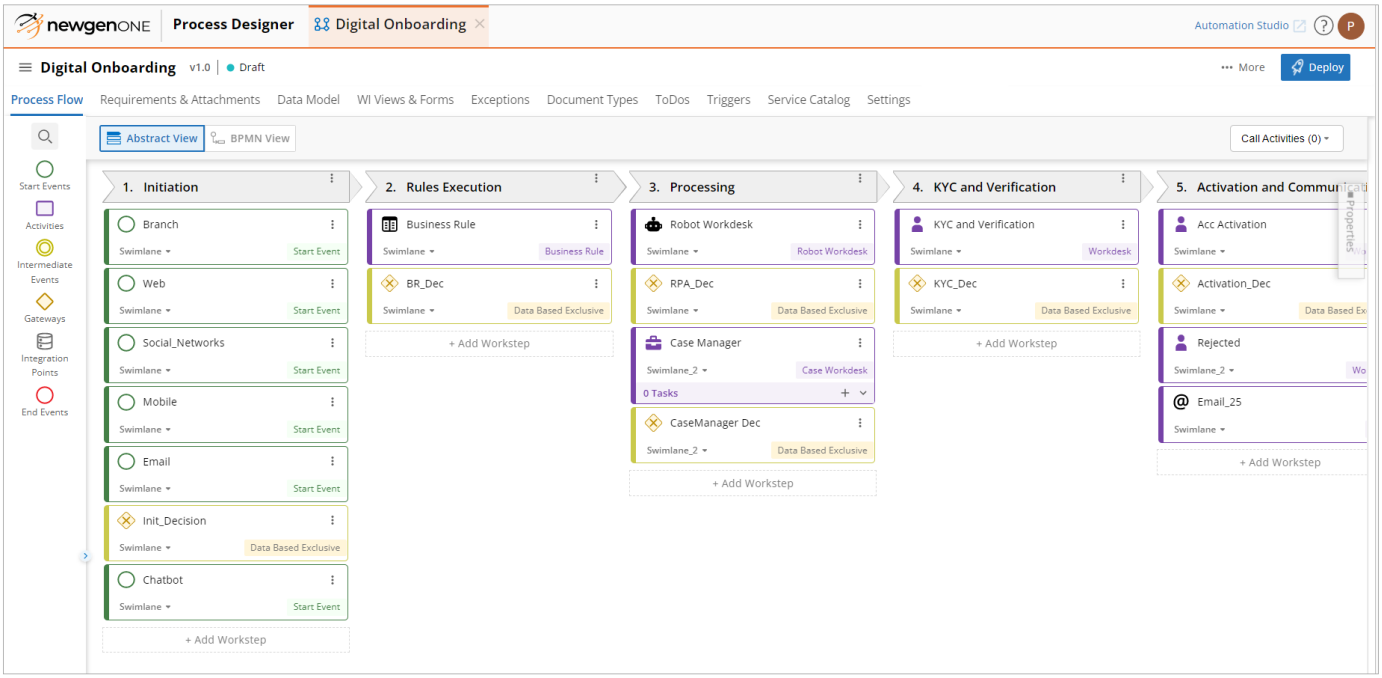
- To regenerate a process based on your existing inputs, click **Regenerate** on the NewgenONE Marvin pane.
- To regenerate a process based on your new inputs, update your existing inputs such as process name, category, geography, or others on the NewgenONE Marvin pane. Then, click **Regenerate** to confirm.

NewgenONE Marvin takes a few seconds and then generates the process.

Exploring process modeling interface

The process modeling interface is where you design and model the processes. This section describes the various components of the process modeling interface.

On the top bar, you can view the process name, status, and version. A process can be in the draft, deployed, deployed (checked-out), enabled, and enabled (checked-out) status.



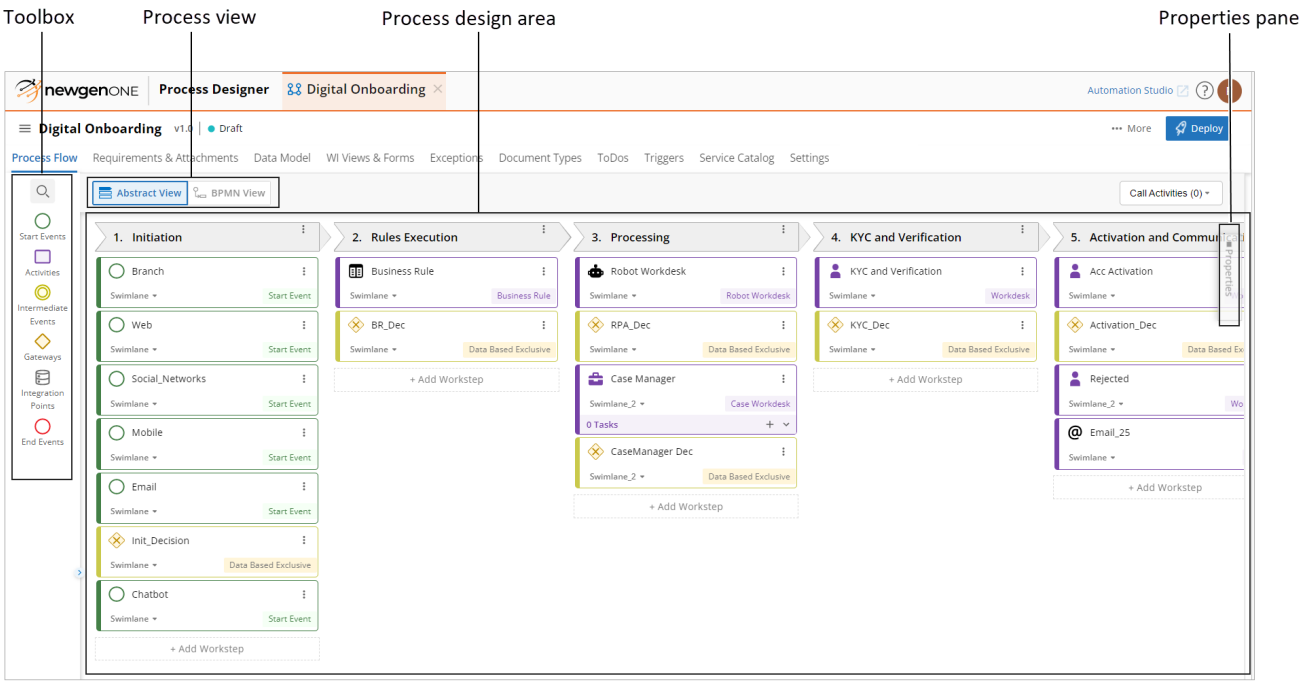
Following are the different tabs available in the Process Modeling interface. Each tab has its own set of functionalities.

- Process flow
- Requirements and attatchments
- Data model
- WI views and forms
- Exceptions
- Document types
- ToDos
- Triggers

- Service catalog
- Settings

Process flow

On the **Process Flow** page, you can create, design, and manage a process. You can add various worksteps to the design area using the Toolbox and later configure their respective properties.



The Process Flow tab is mainly composed of Toolbox, design area, and Properties pane.

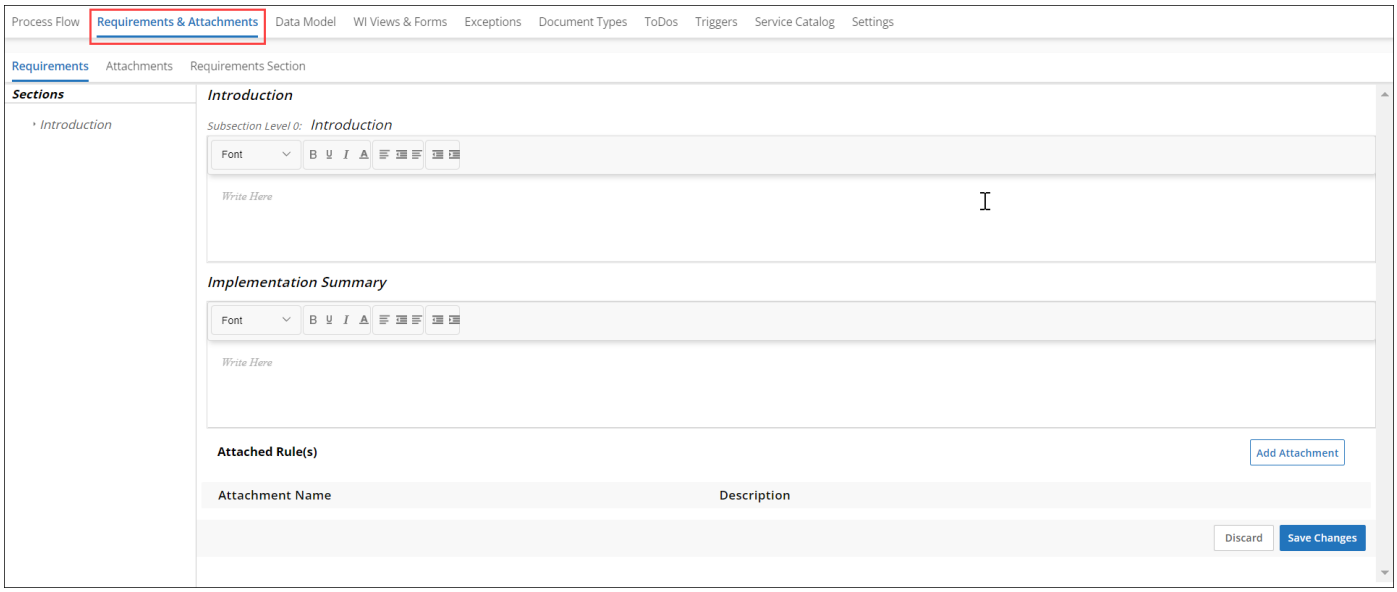
- **Toolbox**: It provides a component palette for the application. It offers a huge variety of tools for designing a business process. Following are the different categories in a Toolbox - start events, task templates, activities, gateways, artifacts, intermediate events, integration points, and end events. These categories vary depending on your chosen view, that is, abstract or BPMN view. For more information, see Types of worksteps.
- **Process View**: It represents the process in a sequence of linked worksteps linked together, through which the workflow moves until it reaches a logical conclusion. There are two types of views in the Process Designer - Abstract and BPMN view. For more information, see Types of views.

- **Process design area**: It is the main work area to create and design a process, such as adding segments, worksteps, and swimlanes. For more information, see Designing process.
- **Properties view**: It displays the complete details of the various types of worksteps and the operations that you can perform on those worksteps. For detailed properties, see Types of worksteps.

The **Call Activities** option on the top-right of the process designer area indicates the number of call activity worksteps used within the process. For more information, see Call activity.

Requirements and attachments

On the **Requirements and Attachments** page, you can view and define the various requirements and attachments for the selected process.



The Requirements and Attachments page contains the following subtabs:

- Requirements
- Attachments
- Requirements section

Requirements section

On the **Requirements Section** page, you can define the process requirements. This section will also show the global and project-level requirements, if any. Furthermore, it also enables you to create a hierarchy to display project requirements up to three levels.

To add a requirement section, perform the following steps:

1. Click **Add Section** on the Requirements Section page. The Add a new Section dialog appears.
2. Enter the section name and add a description, if any.
3. Click **Add & Close** to add the section and close the dialog. To add another requirement section, click **Add Another**.
   On successful addition, you can add a subsection, modify, or delete the requirement section using the corresponding add, edit, or delete icons.

Attachments

On the **Attachments** page, you can add files to a process.

Only .doc, .xls, .xlsx, .docs, .zip, .png, .jpeg, and .pdf files are accepted.

To add an attachment, perform the following steps:

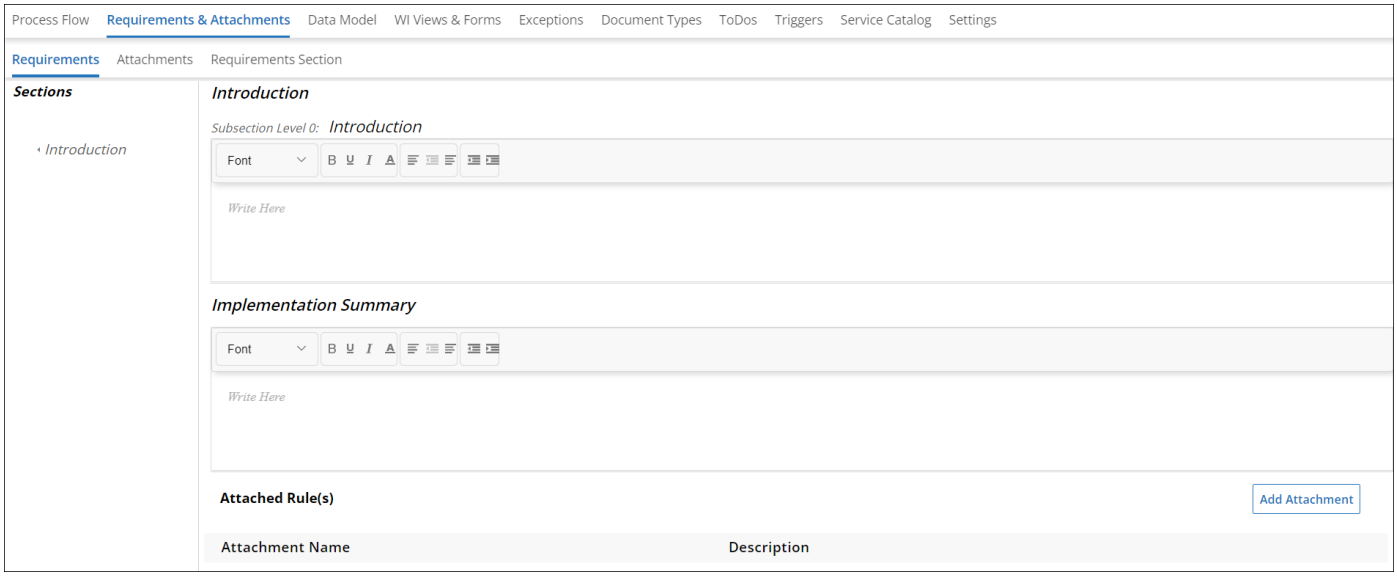
1. Click **Add Attachment** on the Attachments page. The Add Attachment dialog appears.
2. Enter the following details in the dialog.

Field	Description
File Name	Specify the name of the file. Click **Choose File** to select a document from the system.
Document Name	Enter the name of the document.
Description	Provide additional description for the document, if any.

3. Click **Add**.
   On successful addition, you can download or delete the added document using the corresponding download or delete icons.
   Click **Save Attachment** to save the added document.

Requirements

On the **Requirements** page, you can view the added requirement sections and attachments. This tab shows also shows the global and project-level requirements. You can also modify the added requirements and attachments, add new documents by clicking **Add Attachment,** and specify the implementation summary for the added requirement section.

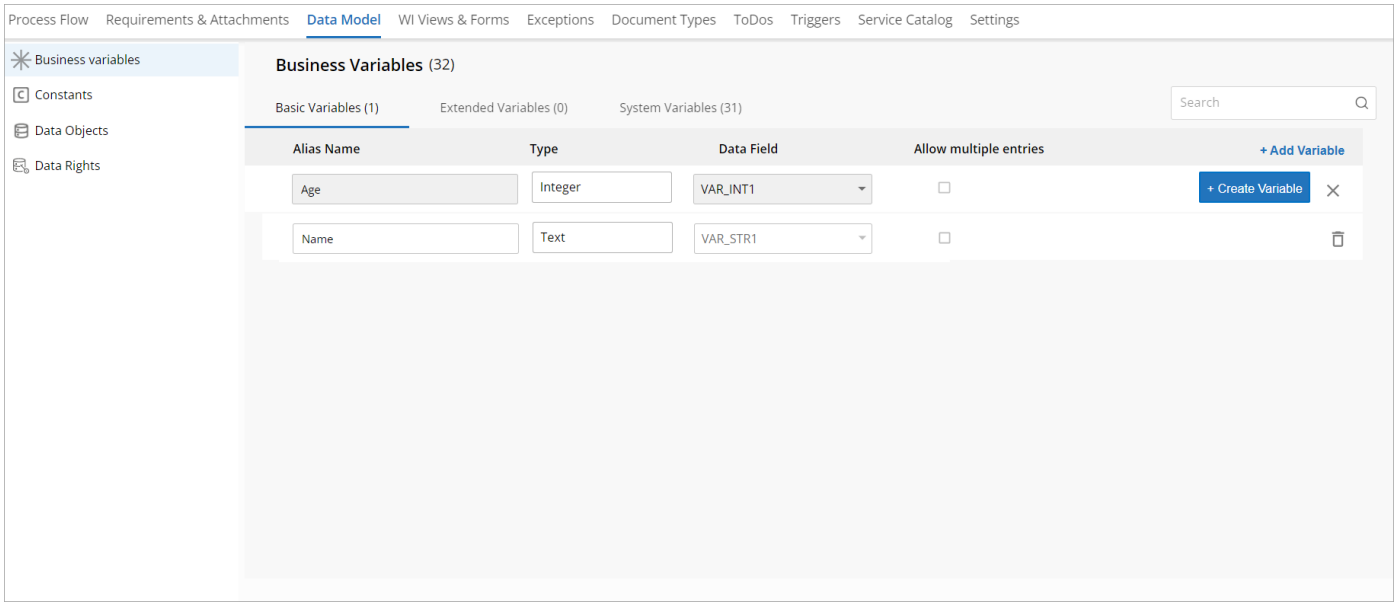


Data model

The **Data Model** page allows you to add business variables, constants, data objects, and data rights.

Before creating a process, it is mandatory to identify and define the variables. The variables represent and store the data associated with the process. Also, these variables help in defining the processing rules for various worksteps within a process.

For example, in an account opening process, the data variables store the information about the customer who has requested to open a bank account. In such a case, the data variables for the account opening process might include variables, such as applicant name, address, age, location, account type, and approval status.



The Data Model page consists of the following sections:

- Business variables
- Constants
- Data objects
- Data rights

Business variables

Business variables are the variables defined for a process.

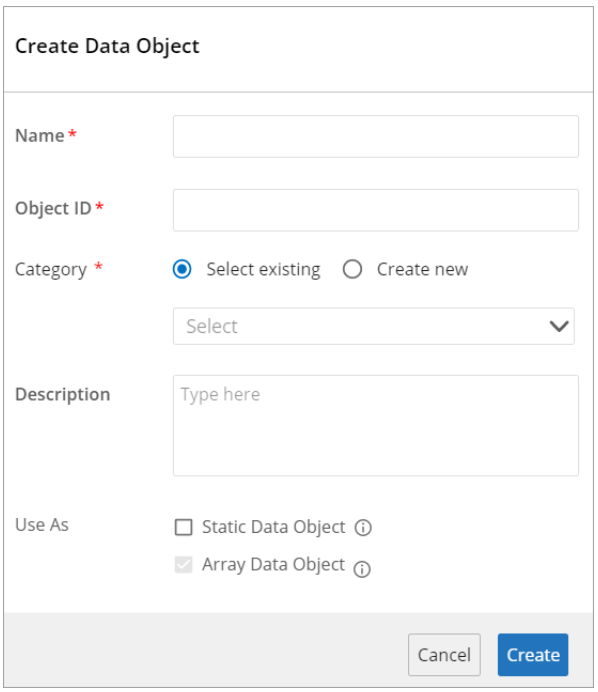
In NewgenONE Process Designer, business variables contain the basic, extended, and system variables for the selected process. Here you can define and view the properties of the variables such as their data type, length, and mapped data field.

Basic variables

Basic variables are the queue variables that are used for storing the process data. They are limited to 42 in number.

To add a basic variable, perform the following steps:

1. Click **Add Variable** in the Basic Variables section.
2. Enter the alias name for the variable.
3. Choose the data type of variable. It can be text, integer, long, float, and date. You can also configure the data object directly.
   If you select the Configure data object directly option, then Create Data Object dialog appears. For procedural details, see **Creating data models** chapter in *NewgenONE Data Model Designer User Guide*.
4. Select the field you want to map with the variable. By default, this field is automatically filled by default value.
5. *(Optional)* Select the **Allow multiple entries** checkbox to enable more than one entry for the added variable.
   The Create Data Object dialog appears. For procedural details, see **Creating data models** chapter in *NewgenONE Data Model Designer User Guide*.



6. Then, click **Create Variable**.

Extended variables

Use extended variables to expand the data storage ability of a process. This is done by creating and mapping the external data objects to store the process data.

To create an extended variable, perform the following steps:

1. Navigate to the Extended Variables tab.
2. Choose any one of the following options to create an extended variable:
    - **Create a data object from scratch** – Use this option to create a data object from scratch within a category. For procedural details, see Creating data object from scratch.
    - **Use existing data object** – Use this option to use an existing data object defined in the Data Model designer. This can be achieved in the following ways:
        - Duplicating the data object and using its copy in the process
        - Directly using the data object in the process

      For procedural details, see Using an existing data object.
    - **Create from template** – Use this option to utilize a template for creating a data object within the selected data object category. These templates are defined in the Data Model designer.

      > For more information, see **Working with data object templates** chapter in *NewgenONE Data Model Designer User Guide*.

Creating data object from scratch

To create a data object, perform the following steps:

1. Specify the name of the new data object.
2. An object ID appears based on the name of the data object you specified. You can modify it and specify an **Object ID** of your choice.
3. For the **Category**, select:
    - **Select existing** — to add the data object from an existing data object category.
        - Select the required category using the dropdown.

- **Create new** — to create a new data object category and add the data object within it.
    - Specify the name of the data object category.
    - Specify a description of the category.
    - Click **Save** to complete the creation of the new data object category.

4. Specify a description of the data object.
5. Click **Create**. The data object gets added.
6. Click **Save** to confirm the changes.
   Once you create a data object, you can then add the variables to the data object as per your requirement in the same manner as you add the basic variables.

Using existing data object

To use an existing data object, perform the following steps:

1. In the Select Data Object dialog that appears, select Categories, Processes, or Applications from the dropdown list based on your requirements.
2. Then, select the corresponding data object.

   > The list of data objects corresponding to Categories is defined in the Data Model Designer.

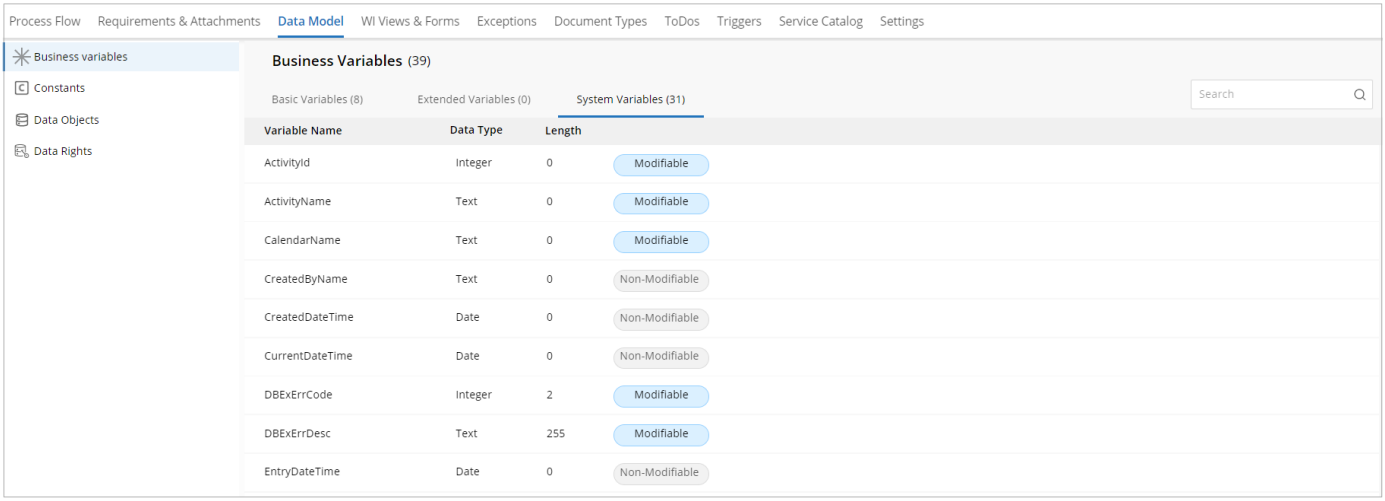
   You can also use the search box to find a particular data object.
   Based on the above data, a list of data objects appears.
3. Select the required data object from the list.
4. Click **Duplicate and use copy** or **Use Data Object** depending on your requirements.
   If you select Duplicate and use copy, then the Duplicate Data Object dialog appears. You can configure the basic and advanced properties of the data object, and then click **Create**.

   > For more information about these options, see **Creating data models** chapter in *NewgenONE Data Model Designer User Guide*.

5. Then, click **Save** to confirm.

System variables

To view the system variables, expand the System Variables section under the Business Variables tab. A list of system variables appears.



Constants

Constants are used for processing rules. They are used to keep a value fixed throughout a process. A prefix CONST_ is added to the name. The value is always kept as a string.

For example, you can add a constant for the interest rate offered by a bank.

To create a constant, perform the following steps:

1. Go to the **Constants** tab.
2. Enter the name and the default value of the constant.
3. Then, click **Create Constant**.
   The constant gets created. You can click the corresponding edit or delete icon to modify or remove the added constant.

Data objects

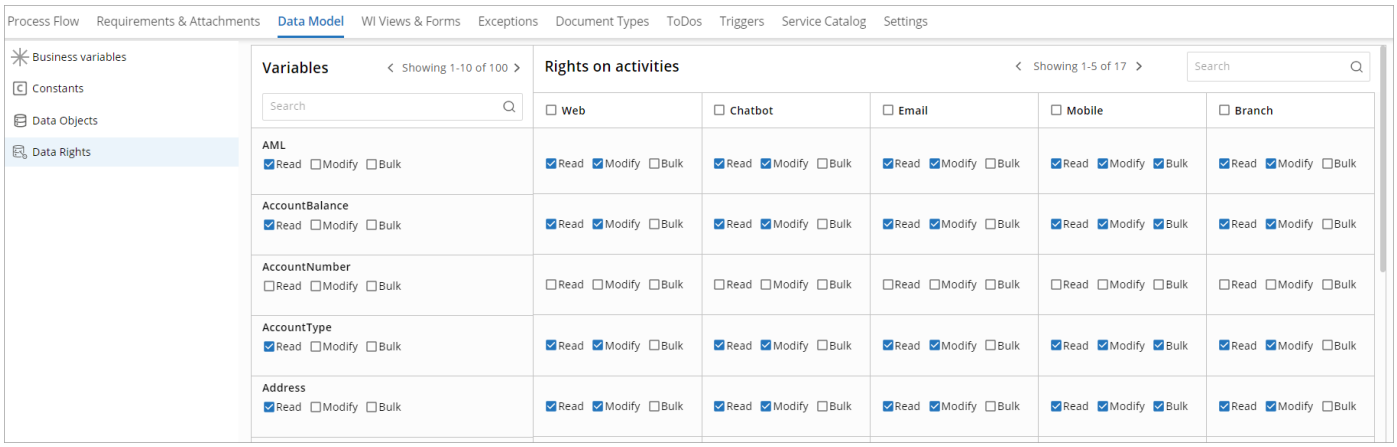
A **data object** is a collection of one or more data points that create meaning as a whole. Values in a data object may have their own unique IDs, data types, and attributes.

In the **Data Objects** tab, you can import data objects, use a template, or create a data object from scratch.

For procedural details, see **Creating data models** chapter in the *Data Model Designer User Guide*.

Data rights

You can control the variable rights of the activities within a process. With these rights, you can enable the read, modify, and bulk rights of the variables in the activities.

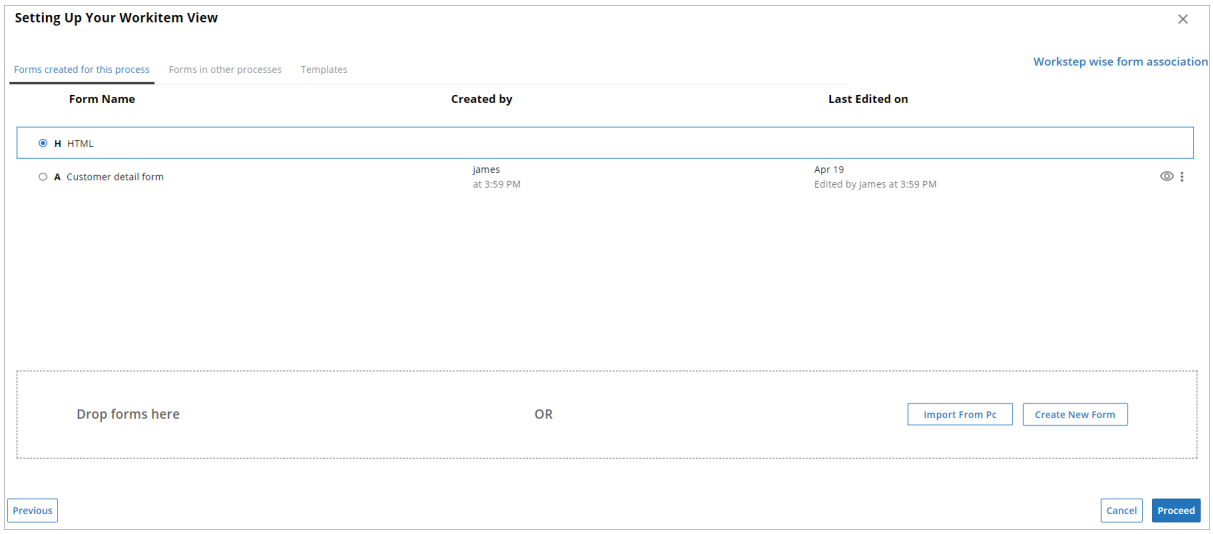


WI views and forms

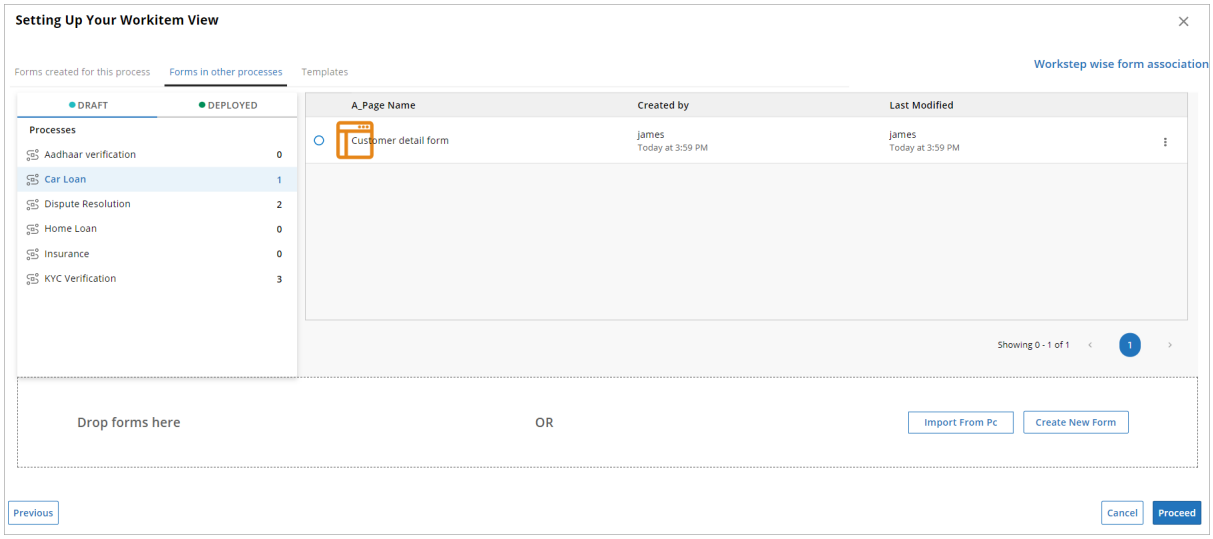
In the WI views and forms tab, you can design or associate the existing form with the process. Here, you can either use a single form for the entire process or different forms for individual worksteps.

To use a single form for an entire process, perform the following steps:

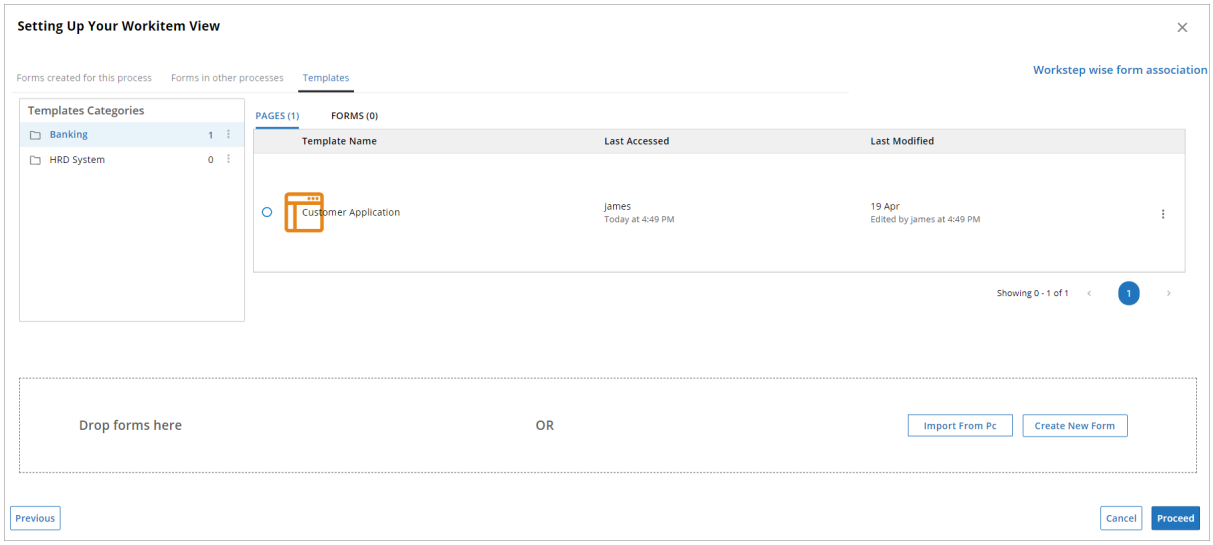
1. Navigate to the **WI views and forms** tab. A Setting Up Your Workitem View dialog appears.
2. Select **Single form for complete process** option, and then click **Next**.
3. Select any of the following options to use the form for the process:
    - **Forms created for this process** — This section displays all the defined forms for this process. Select the required form to associate with the process. You can also create a new form by clicking **Create New Form** and import an existing form from your local system using **Import from PC**.
      For procedural details to create a form, see **Working with forms** chapter in *NewgenONE Interface Designer User Guide*.
      Click the eye icon to view the form. To edit or delete the form, use the corresponding ellipsis icon.



    - **Forms in other processes** — This section displays the forms created in other processes. Select the required form to associate with the process.



- **Templates** — This section displays the forms based on the template categories. These templates are designed in the NewgenONE Interface Designer. Select the required form to associate with the process.

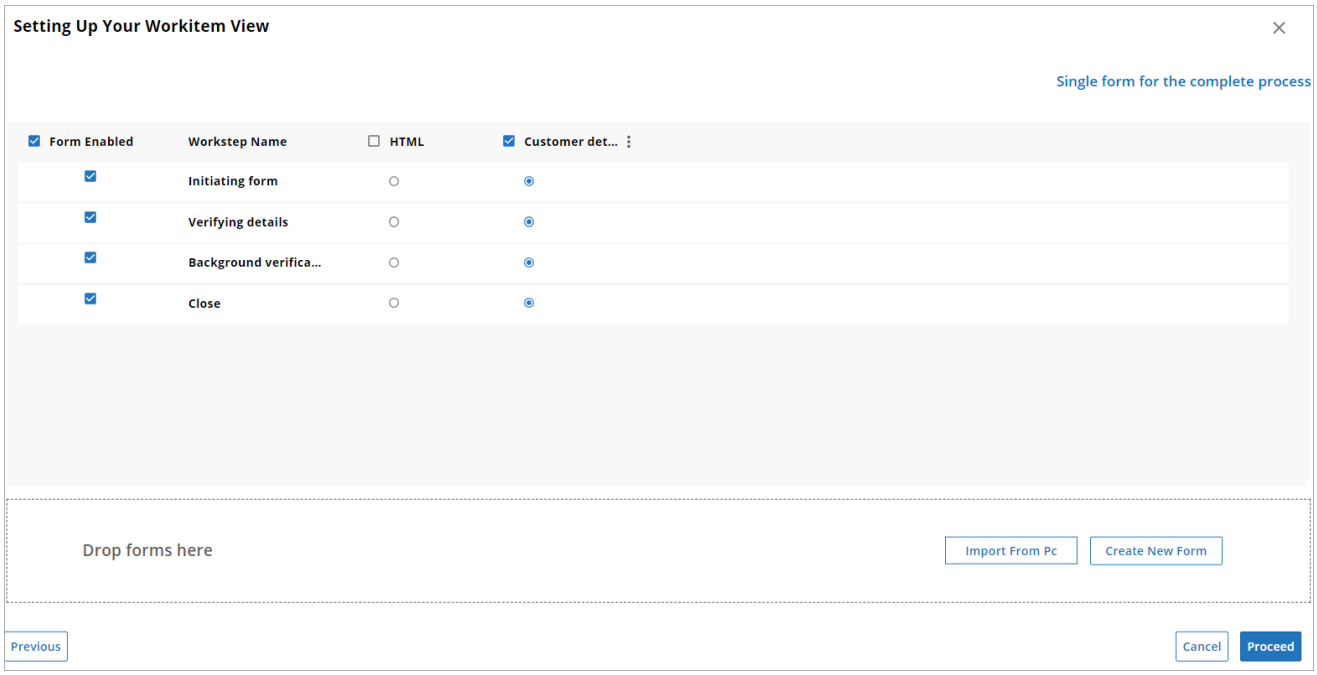


On selecting the form, its preview appears on the right. You can click the **Customize Form Layout** to edit the form layout. You are then redirected to the NewgenONE Form Builder page.

4. Additionally, you can also create a new form by clicking **Create New Form** or import an existing form from your local system using **Import from PC**.
   For procedural details to create a form, see **Working with forms** chapter in *NewgenONE Interface Designer User Guide*.
5. Click **Proceed**.

To select forms separately for each workstep, perform the following steps:

1. Navigate to the **WI views and forms** tab. A Setting Up Your Workitem View dialog appears.
2. Select Workstep wise Form Association option and then click **Next**. The Setting Up Your Workitem View dialog appears. By default, the Form Enabled checkbox is selected for all the worksteps in the process.

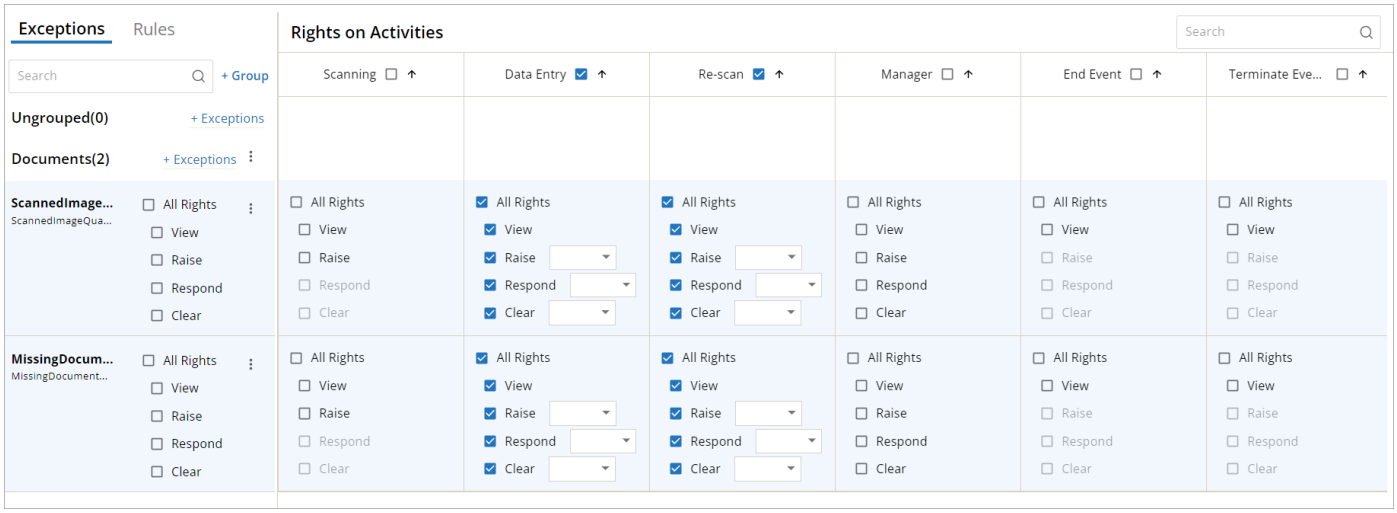


3. Select the required form checkbox you want to associate with the workstep.
4. Additionally, you can also create a new form by clicking **Create New Form** or import an existing form from your local system using **Import from PC**.
   For procedural details to create a form, see **Working with forms** chapter in *NewgenONE Interface Designer User Guide*.
5. Click **Proceed**.

Exceptions

The **Exceptions** tab allows you to define exceptions for the current process. It enables you to throw an exception when a certain condition is not met in the workstep.

For example, in the data entry workstep, you need to ensure the quality of the scanned images in the customer application. In such a case, you can create an exception – 'Low image quality'. So, each time you encounter an image with low image quality, you can raise the Low image quality exception.



On the Exceptions page, you can perform the following operations:

- Group exceptions of similar types. If you do not add an exception to a defined group, they then appear under the Ungrouped section. For procedural details, see Adding group.
- Add, modify, and delete exceptions. For procedural details, see Adding exception.
- Find an exception by typing its name in the search box.
- Grant exception rights to the worksteps or activities defined in the process. The exception rights vary depending on the worksteps or activities. For more details, see Assigning exception rights.
- Define rules for exceptions. For procedural details, see Adding rule.

To add a group, perform the following steps:

1. Click **+Group** on the Exceptions tab. The Add Group dialog appears.
2. Enter the name of the group.
3. Click **Add & Close** to add the group and close the dialog. To add another group, click **Add Another**.
   Click the corresponding ellipsis icon ⋮ to delete the item.

To add an exception, perform the following steps:

1. Click **+Exceptions** on the Exceptions tab. The Add Exception dialog appears.

2. Enter the following details in the corresponding fields:

Field	Description
Exception Name	Enter the name of the exception.
Description	Add information about the exception.

3. Click **Add & Close** to add the exception and close the dialog. To add another exception, click **Add Another**.
   Click the corresponding ellipsis icon ⋮ next to the exception you want to modify, delete, or move to a different location.

To grant exception rights on a workstep or activity, perform the following step:

Select the required checkbox under the particular workstep or activity with the corresponding exception rights. View, raise, respond, and clear are different exception rights, you can assign to a workstep or an activity in the process.

In case, you want to grant all the worksteps or activities, the same exception rights. Then, select the required checkbox under the particular exception. That exception right gets assigned to all the worksteps or activities in the process.

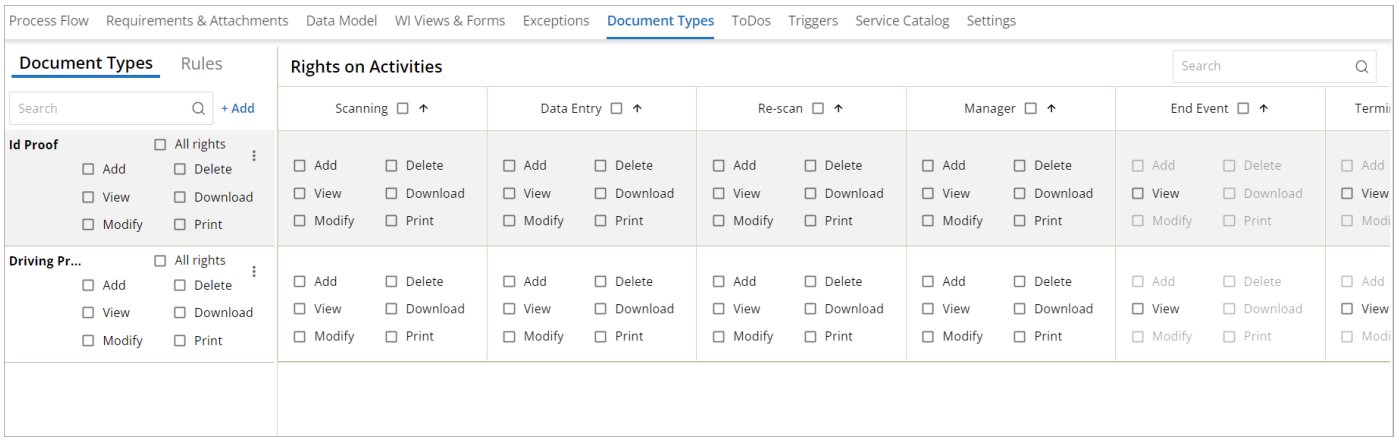
To create a rule, perform the following steps:

1. Navigate to the **Rule** tab, and click **Add Rule**.
2. Select the rule condition. It can either be set to **Always** or **If**.
3. Select the exception you want to apply the rule from the Available Exception section and then click **Add**. To select all the exceptions, click **Add All**. The added exception(s) appear under the Exception List.
4. Click **Add** to create a rule.

Document types

The **Document Types** tab lets you define the different types of documents for the process. A process might require several types of documents to successfully complete its life cycle. With the help of NewgenONE Process Designer, you can define and add various documents and their types to a process.

For example, in an account opening process, documents like account opening application forms and other supporting documents like residence proof, income proof, and others are scanned into the process during the Scanning workstep. Therefore, you need to configure the Document Tool for associating documents with the account opening process.



On the Document Types page, you can perform the following operations:

- Add, modify, and delete documents. For procedural details, see Adding document.
- Find a document by typing its name in the search box.
- Grant document rights to the worksteps or activities defined in the process. The document rights vary depending on the worksteps or activities. For more details, see Assigning document rights.
- Define rules for documents. For procedural details, see Adding rule.

To create a document type, perform the following steps:

1. Click **Create Document Types** on the Document Types page. The Add Documents dialog appears.
2. Enter the following details in the corresponding fields:

Field	Description
Document Type	Enter the name of the document.
Description	Provide additional detail about the document, if any.
Is Mandatory	Specify whether the document is necessary.

3. Click **Add & Close** to add the document type and close the dialog. To create another document type, click **Add Another**.
   Click the corresponding ellipsis icon ⋮ next to the document you want to view or delete.

To grant document rights on a workstep or activity, perform the following step:

Select the required checkbox under the particular workstep or activity with the corresponding document rights. Add, view, modify, delete, download, and print are different document rights, you can assign to a workstep or an activity in the process.

In case, you want to grant all the worksteps or activities, the same document rights. Then, select the required checkbox under the particular document type. That document right gets assigned to all the worksteps or activities in the process.

To create a rule, perform the following steps:

> You cannot define document rules at an activity or workstep level.

1. Navigate to the **Rule** tab, and click **Add Rule**.
2. Select the rule condition. It can either be set to **Always** or **If**.
3. Select the document you want to apply the rule from the Available DocType section and then click **Add**. To select all the documents, click **Add All**.
   The added document(s) appear under the DocType List.
4. Click **Add** to create a rule.

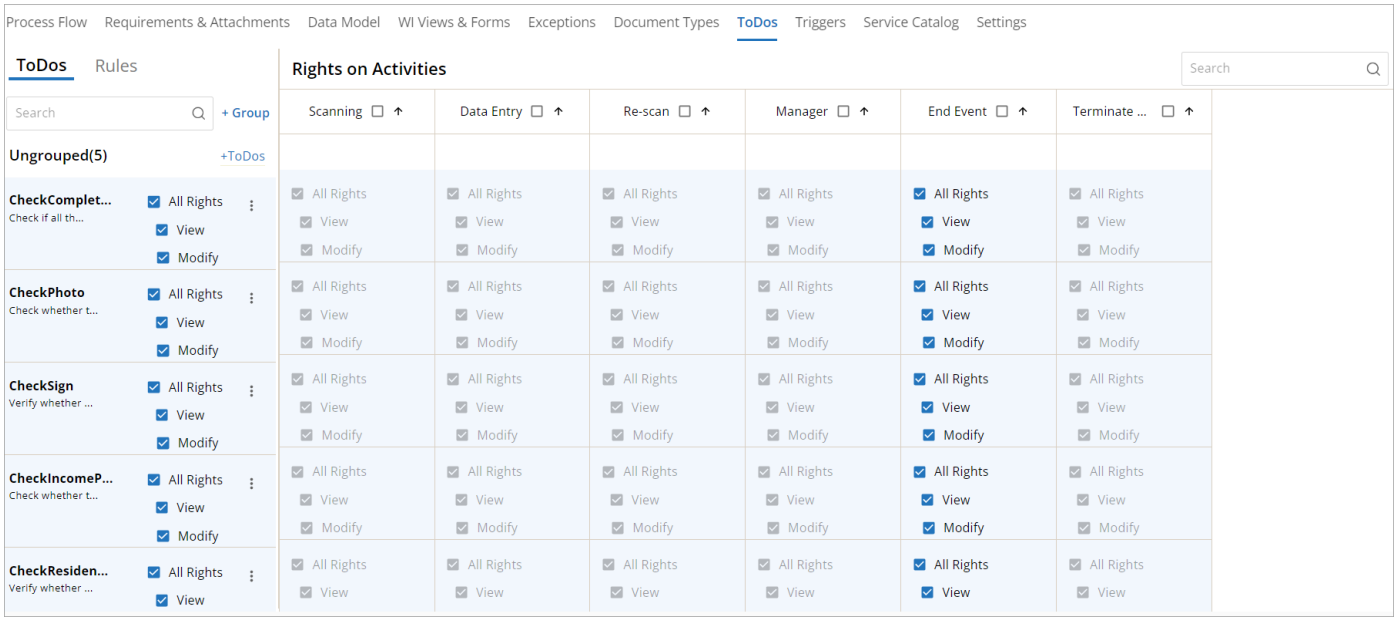
ToDos

In the **Todos** tab, you can define the to-do list for the currently chosen process. A to-do list is typically a comprehensive list of tasks to be completed at a particular step that helps to ensure no important item or task is left for execution.

For example, at the data entry step in the account opening process, there is a need to check the below items:

Todo Item	Description
CheckCompleteness	Check if all the sections of the application form are completely filled.

Todo Item	Description
CheckPhoto	Check whether the photograph of the applicant is attached to the application form.
CheckSign	Verify whether the application form is signed by the applicant.
CheckIncomeProof	Check whether the income proof is attached to the application.
CheckResidence	Verify whether the residence proof is submitted with the application form.



On the ToDos page, you can perform the following operations:

- Group to-do items of similar types. If you do not add a to-do item to a defined group, they then appear under the Ungrouped section. For procedural details, see Adding group.
- Add, modify, and delete to-do items. For procedural details, see Adding todo item.
- Find a to-do item by typing its name in the search box.
- Grant item rights to the worksteps or activities defined in the process. The item rights vary depending on the worksteps or activities. For more details, see Assigning rights.
- Define rules for the to-do items. For procedural details, see Adding rule.

To add a group, perform the following steps:

1. Click **+Group** on the ToDo tab. The Add Group dialog appears.

2. Enter the name of the group.
3. Click **Add & Close** to add the group and close the dialog. To add another group, click **Add Another**.
   Click the corresponding ellipsis icon ⋮ to delete the item.

To add a to-do item, perform the following steps:

1. Navigate to the ToDo tab on the Process Modeling page.
2. On the left pane, click **+ToDos**. The Add ToDo dialog appears.
3. Enter the following details in the corresponding fields of the dialog:

Field	Description
ToDo Name	Enter the name of the to-do item.
Description	Provide additional information about the to-do item, if any.
Mandatory	Select to mark the to-do item as mandatory for the completion of the workstep.
Associated Field	Select the data field you want to map with the to-do item.
Type	Specify the type of the to-do item. It can be any of the following: • **Mark** — Allows you to set the value of the chosen data field to Yes, No, and NA. • **Picklist** — Allows you to add multiple values to the chosen data field. • **Trigger** — Allows you to set a trigger action for the chosen data field. For more information, see Triggers.

4. Click **Add & Close** to add the to-do item and close the dialog. To add another item, click **Add Another**.
   Click the corresponding ellipsis icon ⋮ next to the to-do item you want to view or delete.

To grant to-do rights on a workstep or activity, perform the following step:

Select the required checkbox under the particular workstep or activity with the corresponding to-do rights. View and modify are the different to-do rights, you can assign to a workstep or an activity in the process.

In case, you want to grant all the worksteps or activities, the same to-do rights. Then, select the required checkbox under the particular to-do item. That to-do right gets assigned to all the worksteps or activities in the process.

To create a rule, perform the following steps:

1. Navigate to the **Rule** tab, and click **Add Rule**.
2. Select the rule condition. It can either be set to **Always** or **If**.
3. Select the to-do item you want to apply the rule from the Available ToDo section and then click **Add**. To select all the todo items, click **Add All**.
   The added todo item(s) appear under the ToDo List.
4. Click **Add** to create a rule.

Triggers

A trigger is a set of actions that occurs when a certain event occurs. These actions include sending a mail, setting the value for the data variable, invoking an application, invoking data form for data entry, and communicating from external systems for data population and retrieval.

These are the different types of triggers available in the NewgenONE Process Designer:

- Mail
- Execute
- Launch Application
- Data Entry
- Set
- Set Generate Response
- Exception
- Create Child Workitem

Mail trigger

The mail trigger allows you to send e-mail notifications with a predefined message and subject text to specified users. The predefined message and subject text can also contain variable names that are substituted by their actual values at run time. Mail triggers can be triggered on the entry of workitems in a workstep, or through actions, to-do lists, and more.

To add a mail trigger, perform the following steps:

1. On the Triggers tab, click **Add Trigger** and select **Mail** from the list. The New Trigger page appears.
2. Enter the **Trigger Name** and set the **Type** to mail.
3. Provide a **Description** of the trigger.
4. Specify **From** and **To** using the dropdown.
5. Select **CC**, **BCC**, and **Priority** for the mail trigger using the dropdown.
6. Enter the **Subject** in the space provided. Click **Insert Variable** to add a variable in the mail subject.
7. Enter **Mail Body** in the provided space. Click **Insert Variable** to add a variable in the mail body.
8. Then, click **Add Trigger**.

Fields marked with * are mandatory to fill.

Execute trigger

The execute trigger allows you to execute a workstep in the process.

To add an execute trigger, perform the following steps:

1. On the Triggers tab, click **Add Trigger** and select **Execute** from the list. The New Trigger page appears.
2. Enter the **Trigger Name** and set the **Type** to execute.
3. Provide a **Description** of the trigger.
4. Specify the **Function Name** and **Server Executable** in the space provided.
5. Enter the **Arguments String** in the space provided. Click **Insert Variable** to add a variable in the string.
6. Then, click **Add Trigger**.

Fields marked with * are mandatory to fill.

Launch application trigger

The launch application trigger lets you launch the specified application along with the specified command-line argument string. All three types of variables such as system variables, basic variables, and extended variables can be used for entering the argument string.

To add a trigger using the launch application, perform the following steps:

1. On the Triggers tab, click **Add Trigger** and select **Launch Application** from the list. The New Trigger page appears.
2. Enter the **Trigger Name** and set the **Type** to launch application.
3. Provide a **Description** of the trigger.
4. Input the **Application Name** in the space provided.
5. Enter the **Arguments String** in the space provided. Click **Insert Variable** to add a variable in the string.
6. Then, click **Add Trigger**.

Fields marked with * are mandatory to fill.

Data entry trigger

The data entry trigger enables the data entry of the specified variables. This trigger is mainly used for accomplishing data entry in required fields. The entry of data in fields is facilitated by launching small forms containing the fields for which data entry is required. These small data-entry forms can be used in a process by associating the data-entry triggers with actions or to-do items.

To add a trigger using data entry, perform the following steps:

1. On the Triggers tab, click **Add Trigger** and select **Data Entry** from the list. The New Trigger page appears.
2. Enter the **Trigger Name** and set the **Type** to data entry.
3. Provide a **Description** of the trigger.
4. Select the fields to allow data entry using **+Add**.
5. Then, click **Add Trigger**.
   The new trigger gets added to the list on the left. You can use the search box to find a particular trigger.

Fields marked with * are mandatory to fill.

Set trigger

The set trigger enables you to set a variable with a specified value or with the value of any other variable. This trigger sets values for user-defined variables and external

variables. When the trigger is invoked, the values specified for these variables are automatically set for the workitem in the process.

To add a trigger using a set, perform the following steps:

1. On the Triggers tab, click **Add Trigger** and select **Set** from the list. The New Trigger page appears.
2. Enter the **Trigger Name** and set the **Type** to set.
3. Provide a **Description** of the trigger.
4. Select definition variables from the dropdown. To add more variables, click **Add**.
5. Then, click **Add Trigger**.

Fields marked with * are mandatory to fill.

Generate response trigger

The generate response trigger lets you generate response letters in a process, based on a certain predefined word template. These response letters can also be added to the workitem as documents of the specified document types. Thus, the user can define and register word templates and use them in this trigger.

To add a trigger using generate response, perform the following steps:

A word template is a word document, which may contain process variable names.

1. On the Triggers tab, click **Add Trigger** and select **Generate Response** from the list. The New Trigger page appears.
2. Enter the **Trigger Name** and set the **Type** to generate a response.
3. Provide a **Description** of the trigger.
4. Select the **File Name** from the dropdown.
5. Specify the **Document Type** from the dropdown.
6. Then, click **Add Trigger**.

Fields marked with * are mandatory to fill.

Exception trigger

The exception trigger lets you raise or clear exceptions with comments, on the occurrence of certain events, like actions, to-do lists, rules, and others. When this trigger is executed, the defined exception is raised or cleared with the specified comments.

To define an exception trigger, at least one exception should be defined in the process. To learn about defining exceptions, see Exceptions.

To add a trigger using an exception, perform the following steps:

1. On the Triggers tab, click **Add Trigger** and select **Exception** from the list. The New Trigger page appears.
2. Enter the **Trigger Name** and set the **Type** to exception.
3. Provide a **Description** of the trigger.
4. Select the **Exception Name** from the dropdown.
5. Set the **Action** to raise, respond, or clear.
6. Add a **Comment** for the trigger, if any.
7. Then, click **Add Trigger**.

Fields marked with * are mandatory to fill.

Child workitem trigger

The create child workitem trigger lets you distribute the workflow from one workstep to others while executing workitems. When this trigger is executed, the workitem gets split into two or more paths.

To add a trigger using create child workitem, perform the following steps:

1. On the Triggers tab, click **Add Trigger** and select **Create Child WorkItem** from the list. The New Trigger page appears.
2. Enter the **Trigger Name** and set the **Type** to create child workitem.
3. Provide a **Description** of the trigger.
4. Set the Workstep Name to an existing workstep or variable.
5. Select the **Generate Same Parent** checkbox to make chosen workstep the parent workstep.
6. Select variables from the dropdown. To add more variables, click **Add**.
   When a child workitem gets created, variables defined here will be auto-filled with the values defined here. It can be a constant or variable whose values are substituted with the actual runtime values.
7. Then, click **Add Trigger**.

Fields marked with * are mandatory to fill.

Service catalog

The Service Catalog tab contains the following subtabs.

- WebService
- External Methods
- SAP

Registering web service

A local web service can be used within the currently opened process. The different types of web services supported by NewgenONE Process Designer are SOAP and RESTful.

By default, the SOAP service configuration is disabled. To enable the SOAP service configuration, refer to the *Automation Studio* section of the *NewgenONE Configuration Guide*.

To register a local RESTful web service, perform the following steps:

1. Go to the **Webservice** tab, and click **Add New** in the Webservice List pane.
2. Then, go to the **Definition** tab.
3. Enter the following details in the corresponding fields:

Field	Description
Webservice type	Select a suitable type for the web service. In this case, set the web service type to RESTful.
Manual/Load Template	Specify whether to manually fill in the web service details or load it from the template. To load from template, select **Load Template** option and click **Upload from Desktop**.
Alias	Provide an alias for the web service.
Domain	Select the domain for the web service. It can be BPM, ECM, CCM, BRMS, and SAP.
Description	Provide additional information about the web service if any.
Endpoint Name	Specify the name of the function for accessing the web service.

Field	Description
Base URI	Enter the base URL of the resource, which is being registered.
Resource Path	Specify the remaining URL Path of RESTful service to be appended after the Base URL.
Operation Type	A resource method can be defined on different HTTP protocols such as GET, PUT, POST and DELETE.
Parameter Definition	It allows you to define and configure the parameters for passing additional information to the resource.
Request Body Definition	A method can accept data in the form of a request either in XML or JSON format. Here, you can define and configure the request parameters.
Response Body Definition	It allows you to define and configure the response body structure. Based on the defined structure, the response generates either in JSON or XML format.
Authentication Type	A resource can be secured either through basic authentication or token-based authentication. • **Basic authentication** requires a username and password. • **Token-based authentication** requires all possible fields for authenticating the resource in the OAUTH2 way.
Request Media Type	The type of request body accepted by the resource.
Response Media Type	Choose the type of response body received post execution of resource. For example, the **Response Media Type** can be JSON or XML.

4. Click **Add Webservice** to register the specified web service.
   You can view the registered web service in the Web service List pane. In this pane, you can filter the web service based on its type or domain type. You can also use the search box to look for a particular web service.
   To view the object dependencies, go to the **Process Association** tab.

To register a local SOAP web service using the WSDL path, perform the following steps:

1. Go to the **Webservice** tab, and click **Add New** in the Web service List pane.
2. Then, go to the **Definition** tab.

3. Enter the following details in the corresponding fields:

Field	Description
Webservice Type	Select the suitable type of web service. In this case, set the web service type to SOAP.
Alias	Provide an alias for the web service.
Domain	Select the domain for the SOAP web service. It can be BPM, ECM, CCM, BRMS, and SAP.
Description	Provide additional information about the web service, if any.
WDSL URL	Enter the URL for the web service. Click **Fetch Details** to retrieve the web service name and methods exposed by the specified web service in the **Service Name** and **Method Name** fields.

4. Click **Add Webservice** to register the specified web service.
   You can view the registered web service in the Webservice List pane. In this pane, you can filter the web service based on its type or domain type. You can also use the search box to look for a particular web service.
   To view the object dependencies, go to the **Process Association** tab.

External method

The **External Methods** tab lets you view the system methods and add user-defined methods.

To add a user-defined method, perform the following steps:

1. Navigate to the **External Methods** tab, and expand the User Defined section.
2. Click **+Add**.
3. Enter the name of the application.
4. Enter the name of the method.
5. Specify the return type for the method.
6. Click **Add Parameter** to define parameters for the method.
7. Then, specify the name and type of the parameter.
8. Select the **Array** checkbox to pass arrays as arguments to the method.
9. Then, click **Add Method**.

To view the system variables, expand the System section.

SAP

In the SAP tab, first configure the details to connect with the SAP system. Then, on successful connection, register the functions required to design the processes.

- Registering SAP configuration details
- Registering SAP function

Registering SAP configuration details

To register the SAP configuration details, perform the following steps:

1. From the left pane, navigate to the **SAP** tab. Two tabs, namely Functions and Configurations appear.
2. Go to the **Configuration** tab.
3. Click **Add New** to configure SAP details.
4. Enter the following details in the corresponding fields:

Field	Description
SAP Configuration	Enter the SAP configuration name.
SAP Host Name	Enter the name of the machine running the SAP instance.
RFC Host Name	Select the RFC Host Name checkbox to provide the name of the machine running the RFC server program. RFC is an SAP interface for enabling function calls between the SAP systems.
SAP User Name	Enter the SAP username.
SAP Password	Enter the SAP password associated with the username.
Language	Enter the code for the language to use for developing the business functions.
Instance No.	Enter the SAP instance number.
SAP Client	Enter the client number used in the SAP system.
Http Port	Enter the HTTP port number for the SAP server.

Field	Description
SAP Protocol	Select whether to use HTTP or HTTPS to connect to the SAP system.
SAP ITS Server	SAP Internet Transaction Server (ITS) interface enables effective data exchange between a web server and an SAP (R/3) application server. Select any of the following options: • **Embedded** — If the web server runs on the same machine where the SAP application is running. • **Standalone** — If the web server runs on a separate machine from the SAP application server.

5. Click **Add SAP** to confirm the changes.
6. The SAP configuration now appears in the list on the left. You can also use the search bar to find a specific SAP configuration in the list.

Registering SAP function

To register an SAP function, perform the below steps:

1. Go to the **Functions** tab.
2. Select the SAP configuration from the dropdown list.
   The rest of the details such as SAP hostname, RFC hostname, SAP username and password, language, instance number, and SAP client get automatically filled-in based on the selected configuration.
3. Enter the password associated with the SAP username.
4. Click **Go**.
   On successful validation of entered details, the SAP Function dialog appears. Here, you can choose any one of the following options for selecting a function:
   - Select **ListAll** to view all the functions associated with the configured SAP system.
   - Select **Search on the basis of business object** to narrow down the search results based on the chosen business object. To do this, select the required business object from the **Business Object Types** dropdown list and then select the appropriate method name from the **Method** dropdown list. The Method dropdown list contains only those methods that fall under the selected business object.
     Also, on selection, the ABAP Function field automatically fills with a value

based on the chosen method. Here, ABAP refers to advanced business application programming.

Then, click **OK** to confirm.

5. Click **Register SAP** to confirm the changes. The function is now added to the list. You can also use the search bar to find a specific SAP configuration in the list.

Settings

This tab provides various settings and options for updating the properties and information for the current process.

Setting	Description
General	This section contains the basic details of the process. You can additionally add the owner's email ID, provide a description for the process, add custom validation by configuring the required people and systems, and determine the key performance indices. For more information, see Defining general properties.
Deploy Properties	This section describes the deployment properties of the process. You can specify these settings here or at the time of process deployment. For more information about these properties, see Deploying processes.

Setting	Description
Features	This section lists the process features you require at the time of designing. These features include SAPGUIAdapter, Mobile, TodoList, Action, FormView, Exceptions, Document, Archive, PrintFaxEmail, ScanTool, and DynamicCase. • Todo List — It allows you to choose whether to display the to-do lists used for defining and capturing items or checkpoints to be completed at the time of process simulation. • Action — It allows you to perform certain operations when certain conditions are met. • FormView — It enables you to choose whether to display the forms menu for attaching forms to process if needed. • Exceptions — It enables you to choose whether to display the exceptions menu for attaching exceptions to the process. • Document — It enables you to choose whether to display the documents menu for defining document types associated with the process. • Archive — It enables you to choose whether to display the DMS Adapter menu which allows the users to archive the workitem data and document in the underlying Document Management System. • PrintFaxEmail — It enables you to choose whether to display the Print/Fax/Email settings for configuration via Send activity in a process. • ScanTool — It enables you to choose whether to display the Scan settings for connecting to scanning devices. • Mobile — It allows you to enable mobile-related settings in processes via workdesk properties. • SAPGUIAdapter — It allows you to enable SAP-related configuration screens through which process(es) can integrate with SAP servers. The SAPGUIAdapter feature is only available when the SAP Add-In installer is running on the JBoss application server. • DynamicCase — It allows you to enable the case management feature in the process. In case, you remove the feature from the list, then you cannot see the tasklane in the BPMN view and case workdesk activity in the Toolbox. You can also register a new feature. For procedural details, see Registering feature.

Setting	Description
Default Queues	This section allows you to set the default queue for the activities in the swimlane. It can either be a swimlane queue or activity specific queue.
Templates	This section allows you to add a template in the process for a defined document type. For procedural details, see Registering templates.
Trigger Type	This section lets you register user-defined trigger types in the process. You can define new trigger types. This menu item invokes the Trigger Definition dialog box for defining triggers for the current process. These are used to define the events at the defined worksteps in a process. These events can invoke triggers that can send messages or invoke exception-processing programs. Triggers can be used by the system for sending mails/fax, generating responses, invoking data forms for data entry, communicating from external systems for data updating and retrieval, informing supervisors of exceptional conditions, and others. For procedural details, see Registering trigger.
Audit Logs	This section allows you to generate a log of actions for the process. For more information, see Generating audit log.

Defining general properties

The General section shows the name, version, and creator name for the process.

1. Enter the email address for the email.
2. Click the plus icon next to the corresponding fields to configure the owner, consultant, system, provider, and consumer.
3. In the dialog that appears, select the required users, and click **Save Changes** to confirm.
4. Enter the cost of the process in dollars ($).
5. Enter the turnaround time for the process in days, hours, and minutes using working days or calendar days.
6. Select the type of calendar. The default value is set to 24/7. Click the add button to add a calendar type, and the edit icon to modify the added calendar. For more information, see Creating, adding, and editing calendar.

7. Provide the description for the process in the rich text editor.
8. Click **Save**.

Registering feature

To register a feature, perform the following steps:

1. On the Settings page, from the left navigation bar, click **Feature**. The Process Features page appears. It displays the list of features that can be defined for the selected process.
2. On the right, click **Register feature**. The Register Feature dialog appears.
3. Specify the following details:

Field	Description
Feature Name	Enter the feature name.
Property Interface Http Path	Enter the HTTP (Hypertext Transfer Protocol) path for the property interface.
Table Name	Enter the name of the table.
Execution Interface Http Path	Enter the HTTP path for the execution interface.
Menu Name	Enter the name of the menu.

4. Click **Register**. The feature gets registered.

Registering template

To register a template, perform the following steps:

1. On the Settings page, from the left navigation bar, click **Templates**. The Templates page appears. It displays the list of trigger types that are available for the selected process.
2. On the right, click **Register Template**. The Register Template dialog appears.

3. Specify the following details:

Field	Description
Tools	Select one of the following tools to register the template: • MS Office • Open Office • Apache • AddIns(Jave)
Input Format	Select the required input file format for the template. The options in this field appear as per the selected tool in the Tools field.
File Name	Click **Choose File** to add the required file from your local system.
Document Type	Select the required document type from the dropdown list.
Output Format	Select the required output file format for the template.
Data Format	Select the required data format for the template.
Arguments	Select the required argument. You can also select multiple arguments. The selected arguments appear under the Arguments field.

4. Click **Register**. The template gets registered.

Registering trigger

To register a trigger type for the current process:

1. On the Settings page, from the left navigation bar, click **Trigger Types** and then click **Register Trigger**.
2. Enter the name of the trigger.
3. Enter the HTTP path for the property.
4. Enter the HTTP path for the execution.
5. Enter the name of the table.
6. Click **Register**.

Designing process

This chapter describes the various operations involved in designing a process using the NewgenONE Process Designer:

- Adding workstep
- Renaming workstep
- Copying and pasting workstep
- Deleting workstep
- Adding segment
- Renaming segment
- Deleting segment
- Adding swimlane
- Renaming swimlane
- Deleting swimlane

Adding workstep

The Toolbox in the Process Designer supports a variety of worksteps that you can add to your process. To know more about worksteps, see Types of worksteps.

To add a workstep in the abstract view, perform the following steps:

> Ensure you are designing the process in the abstract view. Else, click **Abstract View** on top of the design area.

1. Go to the **Process Flow** tab on the Process Modeling page.
2. From the Toolbox on the left, select the required workstep category. For example, start events, activities, intermediate events, gateways, integration points, or end events.
   You can also use the search box to directly find the workstep.

   > To directly add a workdesk to a segment, click **+ Add Workstep** on the design area.

3. Then, select the workstep from the category list and drag-drop to the **+ Add Workstep** area under the required segment. The workstep gets added.

To add a workstep in the BPMN view, perform the following steps:

Ensure you are designing the process in the BPMN view. Else, click **BPMN View** on top of the design area.

1. Go to the **Process Flow** tab on the Process Modeling page.
2. From the Toolbox on the left, select the required workstep category. For example, start events, activities, intermediate events, gateways, integration points, end events, or artifacts.
   You can also use the search box to directly find the workstep.
3. Then, select the workstep from the category list and drag-drop to the required swimlane. The workstep gets added.
   Furthermore, you can select that workstep and choose the required activity icon to directly add a workdesk, JMS producer, inclusive distribute, data exchange, and end point to the process.

Renaming workstep

To rename a workstep in the abstract view, perform the following steps:

Ensure you are designing the process in the abstract view. Else, click **Abstract View** on top of the design area.

1. Go to the **Process Flow** tab on the Process Modeling page.
2. Click the ellipsis icon ⋮ next to the required workstep, and select **Rename**.
   Alternatively, hover your mouse cursor over the workstep name.
3. Enter the new name for the workstep and click ✓. The Rename Queue dialog appears. This dialog only appears when you are renaming a workdesk that uses its own queue, or in case you are renaming a start event.
   In the dialog, click **Yes** if you want to rename the queue as the activity name. Else, click **No**.
   The workstep gets renamed.

To rename a workstep in the BPMN view, perform the following steps:

Ensure you are designing the process in the BPMN view. Else, click **BPMN View** on top of the design area.

1. Go to the **Process Flow** tab on the Process Modeling page.

2. Click the **Settings** icon next to the required workstep, and select **Rename**. Alternatively, hover your mouse cursor over the workstep name and click the edit icon.
3. Enter the new name for the workstep and click . The Rename Queue dialog appears. This dialog only appears when you are renaming a workdesk that uses its own queue, or in case you are renaming a start event.
   In the dialog, click **Yes** if you want to rename the queue as the activity name. Else, click **No**.
   The workstep gets renamed.

Copying and pasting workstep

You can copy and paste a workstep only in the BPMN view.

To copy and paste a workstep, perform the following steps:

Ensure you are designing the process in the BPMN view. Else, click **BPMN View** on top of the design area.

1. Click the **Settings** icon next to the required workstep.
2. Select **Copy** from the list.
3. Then, right-click on the design area where you want to paste the copied workstep and select **Paste**. The workstep gets copied.

Deleting workstep

To delete a workstep in the abstract view, perform the following steps:

Ensure you are designing the process in the abstract view. Else, click **Abstract View** on top of the design area.

1. Go to the **Process Flow** tab on the Process Modeling page.
2. Click the ellipsis icon next to the required workstep, and select **Delete**.
   The workstep gets deleted.

To delete a workstep in the BPMN view, perform the following steps:

Ensure you are designing the process in the BPMN view. Else, click **BPMN View** on top of the design area.

1. Go to the **Process Flow** tab on the Process Modeling page.
2. Click the **Delete** icon next to the required workstep.
   The workstep gets deleted.

You cannot delete a workstep in the following scenarios:

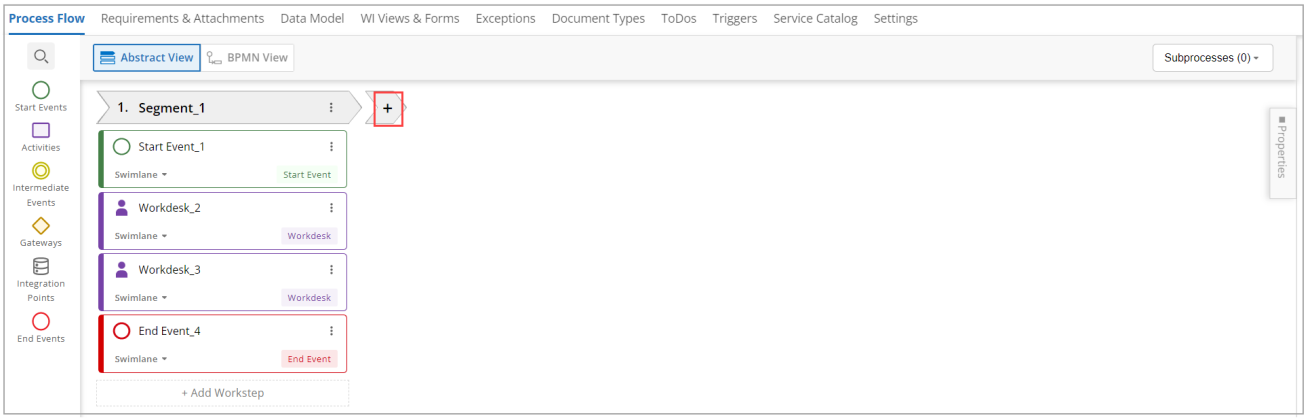
- If the workstep is the default activity.
- If there is a single workstep in the segment.
- If the workstep is associated with another workstep.

Adding segment

To add a segment in the abstract view, perform the following steps:

Ensure you are designing the process in the abstract view. Else, click **Abstract View** on top of the design area.

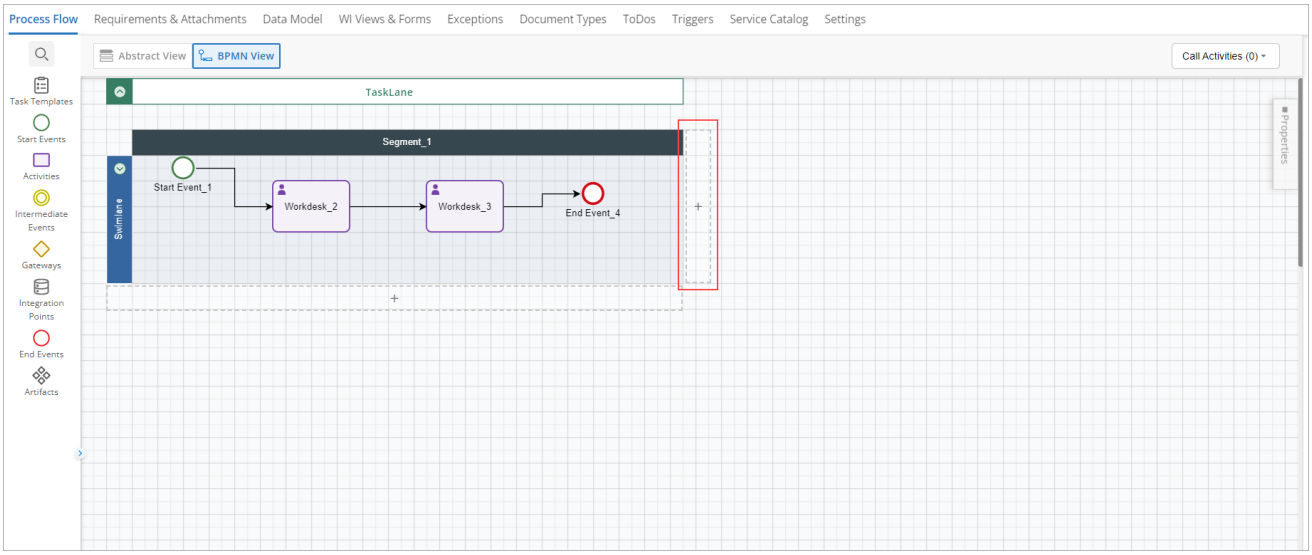
1. Go to the **Process Flow** tab on the Process Modeling page.
2. On the design area, click the **Add Segment** icon.
   A new segment gets added.



To add a segment in the BPMN view, perform the following steps:

Ensure you are designing the process in the BPMN view. Else, click **BPMN View** on top of the design area.

1. Go to the **Process Flow** tab on the Process Modeling page.
2. On the design area, click the **Add Segment** icon.
   A new segment gets added.



Renaming segment

To rename a segment in the abstract view, perform the following steps:

Ensure you are designing the process in the abstract view. Else, click **Abstract View** on top of the design area.

1. Go to the **Process Flow** tab on the Process Modeling page.
2. Click the ellipsis icon next to the required segment, and select **Rename**.
   Alternatively, hover your mouse cursor over the segment name.
3. Enter the new name for the segment and click .
   The segment gets renamed.

To rename a segment in the BPMN view, perform the following steps:

Ensure you are designing the process in the BPMN view. Else, click **BPMN View** on top of the design area.

1. Go to the **Process Flow** tab on the Process Modeling page.

2. Click the ellipsis icon next to the required segment, and select **Rename**. Alternatively, double-click over the segment name.
3. Enter the new name for the segment and click .
   The segment gets renamed.

Deleting segment

To delete a segment in the abstract/BPMN view, perform the following steps:

> You cannot delete a segment if it contains default activity.

1. Go to the **Process Flow** tab on the Process Modeling page.
2. Click the ellipsis icon next to the required segment, and select **Delete**.
   The segment gets deleted.

Adding swimlane

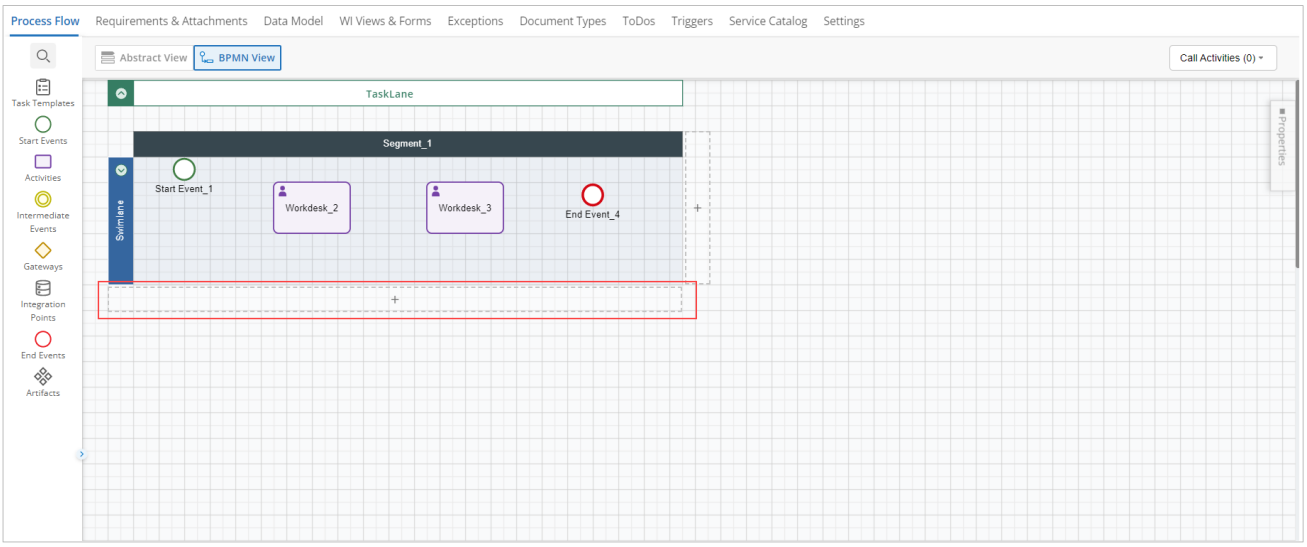
Swimlane is a visually separated row within a process diagram. It groups different activities by resource definitions, roles, classifiers, organization units, or locations.

> Swimlanes can only be added in the BPMN view.

To add a swimlane, perform the following steps:

> Ensure you are designing the process in the BPMN view. Else, click **BPMN View** on top of the design area.

1. Go to the **Process Flow** tab on the Process Modeling page.
2. On the design area, click the **Add Swimlane** icon.
   A new swimlane gets added.



Renaming swimlane

To rename a swimlane in the BPMN view, perform the following steps:

Swimlanes are only present in the BPMN view.

1. Go to the **Process Flow** tab on the Process Modeling page.
2. Click the ellipsis icon ⋮ next to the required swimlane, and select **Rename**.
3. Enter the new name for the swimlane and click ✓.
   The swimlane gets renamed.

Deleting swimlane

To delete a swimlane in the BPMN view, perform the following steps:

- Swimlanes are only present in the BPMN view.
- You cannot delete a segment if it contains default activity.
- Ensure you are designing the process in the BPMN view. Else, click **BPMN View** on top of the design area.

1. Go to the **Process Flow** tab on the Process Modeling page.
2. Click the ellipsis icon ⋮ next to the required swimlane, and select **Delete**.
   The swimlane gets deleted.

Working with worksteps

This chapter describes how to configure the properties of different worksteps in NewgenONE Process Designer:

- Start events
- Activities
- Intermediate events
- Gateways
- Integration points
- Artifacts
- Task templates
- End events

Reference(s)

Types of worksteps

Start events

Start Event is referred to as an entry point in each process. It consists of only outgoing links and no incoming links. The start event is added by default when a new process is created. In other words, each process defines an entry point from where the workitems enter the workflow. This entry point is referred to as the start event workstep.

For example, in an account opening process, the initiation includes scanning applications and other additional documents. This initiation task signifies the starting point of the process.

> In earlier versions of NewgenONE Process Designer, work items generated from the Portal moved to the start event, requiring users to initiate them manually. Now, a default setting advances Portal-generated work items to the swimlane.

To add a start event workstep, select **Start Events** from the Toolbox, and drag the Start event to the design area.

Start event

This section discusses the various properties of the **Start Event** workstep available in the NewgenONE Process Designer. The following are the ways to access the properties for a workstep from different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep, and select **Properties**.

A Properties dialog appears that comprises of the following tabs:

- Basic Details
- Initial Rules
- Requirements
- Attachments
- Workdesk
- Data Fields

Basic Details tab

This tab lets you configure the basic settings for the workstep.

Field	Description
Set as Default Start	Select the checkbox to set the event as the default starting point of the process. In case of start event, this option is selected by default.
Description	Provide additional information about the workstep, if any.
Mobile Enabled	Select to enable management of to-do items, documents, and exceptions at run time while accessing the queues in mobile.
Associated Queue	Each workstep is associated with a queue. By default, the start event workstep uses the default queue generated by the process designer. You can click the edit button to modify the queue settings. For more information, see Associating queue with the workstep.
Target Workstep	Choose an activity from the dropdown as the target workstep.

Field	Description
Cost	Specify the cost for workstep in dollars.
Calendar	Select the type of calendar. The default value is set to 24/7. Click the add button to add a calendar type, and the edit button to modify the added calendar. For more information, see Creating, adding, and editing calendar.
Forms and Validations	Select the **Form Enabled** checkbox to attach a form with the activity.
Form Name	Select the name of the form from the dropdown.
Bulk Enabled	Select the checkbox to enable bulk initiation of the workitems at the same time.
Bulk Form Name	Select the name of the bulk form using the dropdown.
Configure People and Systems	Allows user to add custom validation on activity. You can configure the owner, consultant, system, provider, and consumer.

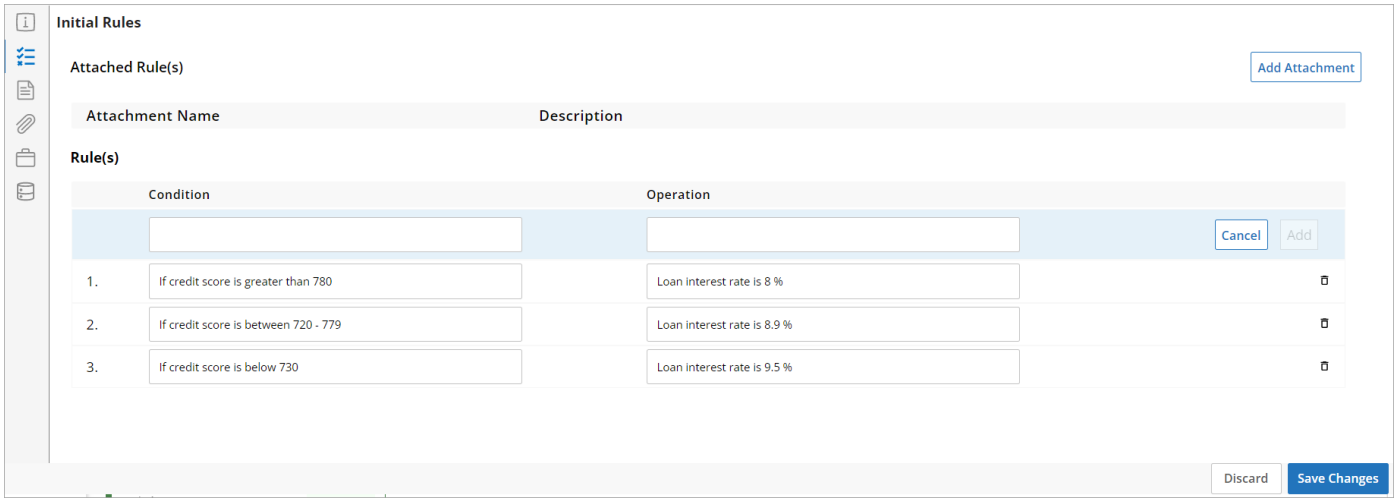
Initial Rules tab

In this tab, you can specify the rules for the processes that are easily understood by other users. It does not require you to have any technical knowledge for the creation of conditional expressions.

Initial rules do not impact the execution of the process.

For example, in a loan approval process. The bank can create rules to specify the interest rates for the loan depending on the customer's credit score, as follows:

- If the credit score is below 730, then the customer will pay an interest rate of 9.5 percent.
- If the credit score is between 720 - 759, then the customer will pay an interest rate of 8.9 percent.
- If the credit score is greater than 780, then the customer will pay an interest rate of 8 percent.



To create an initial rule, perform the following steps:

1. Click **Add** under the Rule(s) section.
2. Enter the **condition** for the rule. For example, you can enter this text in the condition textbox - "If credit score is between 720 - 759".
3. Enter the **operation** you want to apply in case the condition is met. For example, if the customer's credit score lies between 720 to 759, then he will pay an interest rate of 8.9%.
4. Then, click **Add** to save the rule.
   To delete a rule, click the corresponding delete icon .

You can also upload attachments under the Attached Rule(s) using the **Add Attachment** button. For procedural details, see Attachments.

Requirements tab

In this tab, you can view the added requirement sections and attachments. You can also modify the added requirements and attachments, add new documents by clicking **Add Attachment,** and specify the implementation summary for the added requirement section.

Attachments tab

This tab lets you attach documents to the process using the **Add Attachment** button. You can also view the added attachments here. For procedural details, see Attachments.

Only .doc, .xls, .docs, .zip, .png, .jpeg, and .pdf files are supported types for attachment.

Workdesk tab

This tab enables you to view the to-do list, actions, exception(s), and document(s), add SAP definitions, and enable the scan tool along with the selected activity. The configuration of the workdesk facilitates the run-time display of the workdesk for the users working on workitems of this workstep.

Following are the different tabs available:

- ToDo
- Actions
- Exception(s)
- Document
- Scan
- SAP

ToDo

To associate a to-do item, perform the following steps:

1. Navigate to the **ToDo** tab. This tab is selected by default.
2. Select the **ToDo List** checkbox.
3. Select a to-do item to associate with the workstep from the Defined List. Once you select a to-do item, you can see its information under the ToDo Item Details section.

> In case, there are no to-do items added to the process, click **Define**. For procedural details on how to define a to-do item, see ToDos.

4. Click **Associate**, and then select **Save Changes** to confirm.

To remove an associated to-do item:

1. Select the required to-do item from the Associated List.
2. Click **De-Associate**.
3. Then, select **Save Changes** to confirm.

To make a to-do item read-only, perform the following steps:

1. Select the required to-do item from the Associated List.
2. Select the **ReadOnly** checkbox under the to-do item Details section.
3. Click **Save Changes** to confirm.

Actions

To add an action, perform the following steps:

1. Navigate to the **Actions** tab.
2. Select the **Action** checkbox to add a new action.
3. Enter the name of the action.
4. Set the condition to always, if, or otherwise. After choosing the condition type, specify the variable, operator, and value.
    a. Specify the operation type, variable, value, and operator using the dropdown. Following are the different operation types you can use in NewgenONE Process Designer:

Operation type	Functionality	Description
Set	To set a variable (external, system modifiable, or queue) to a constant, value of a variable, result of an expression, or a fixed value.	All the modifiable system variables, external data, and queue variables appear in Field combo box. The Value combo box includes all the constants, all system variables, external data, and queue variables. Operators can be +, -, * or \.
Increase Priority	To increment the priority of the workitem.	Priority cannot be increased beyond 'Very High'. Thus if the priority of a workitem is already 'Very High' then this action will not have any effect.
Decrease Priority	To decrement the priority of the workitem.	Priority cannot be decreased beyond 'Low'. Thus if the priority of a workitem is already 'Low' then this action will not have any effect.
Trigger	To fire a trigger defined in the process.	All triggers defined in the process are available in the selection list.
Raise	To raise an exception.	Only the exceptions associated with the workstep having raise rights are available in the Exceptions list.
Submit	To submit the workitem or mark the workitem as 'Done'.	When this action gets fired, you are prompted to save all the changes made to the workitem, and then the workitem is marked as 'DONE'.

Operation type	Functionality	Description
Release	To save and release the workitem.	When this action gets fired, you are prompted to save all the changes made to the workitem. Thus, the workitem gets closed.

5. Click **Add Action** and then **Save Changes** to confirm.
   To delete an added action, select the required action from the Action list on the left and click **Delete**.

Exception(s)

To associate an exception, perform the following steps:

1. Navigate to the **Exception(s)** tab.
2. Select the **Exception** checkbox.
3. Select an exception to associate with the workstep from the Defined List. Once you select an exception, you can see its information under the Exception Details section.

> In case, there are no exceptions added to the process, click **Define**. For procedural details, see Exceptions.

4. Click **Associate**, and then select **Save Changes** to confirm.

To remove an associated exception:

1. Select the required exception from the Associated List.
2. Click **De-Associate** and then **Save Changes** to confirm.

Document

Grant document rights to the chosen workstep or activity by navigating to the **Document** tab and clicking the **Document** checkbox. The document rights vary depending on the worksteps or activities. View, modify, delete, download, and print are the available document rights.

> In case, there are no documents added to the process, click **Define**. For procedural details, see Document types.

Select the required document rights checkbox(es) corresponding to the particular document type.

Scan

Scan Actions are a set of actions that are triggered on the addition of a document of that type to the workitem. They are used for setting variables to specific fixed values, constants, or values of other variables.

To enable scan action on a document, perform the following steps:

1. Navigate to the **Scan** tab.
2. Select the **Scan Tool** checkbox.
3. Select the checkbox to provide **additional scan rights** on the corresponding document.
4. Click **Scan**. The Scan Action dialog appears.
5. Set a variable against a fixed or constant value, or another variable. Click **Add** to specify another variable.
6. Click **OK** and then **Save Changes** to confirm.

SAP

This tab lets you add SAP definitions to access the SAP functions on a manual workstep. Each definition corresponds to an SAP TCode (Transaction Code) for which you need to map the SAP field names with the required NewgenONE process variables.

This tab only appears in the case of start event, workdesk, and case workdesk worksteps.

To add a new SAP definition, perform the following steps:

To view the SAP tab in the workstep, ensure to do the following:

- Add the SAPGUIAdapter feature to the process features. For more information, see Settings.
- Run the SAP Add-Ins installer. For more information, see *NewgenONE SAP Add-on Installation Guide*.

1. Navigate to the **SAP** tab.
2. Click **+ Add New**. On the left pane, you can see a list of SAP definitions added to the current workstep and on the right, you can create a new SAP definition.
3. Select the **SAP Adapter** checkbox.
4. Select an appropriate SAP configuration from the dropdown list. For information on how to configure the SAP details, see SAP.
5. Click the **Add New Definition** icon and enter the following information in the corresponding fields:

- **Definition Name** — Enter the name of the SAP definition.
- **SAP TCode** — Select the process variable from the dropdown list containing the SAP TCode value. The SAP TCode value is a transaction code for accessing the functions in the SAP system more rapidly.

To use an existing SAP definition, select the required definition from the dropdown list.

> The Defined Definition dropdown shows all the SAP definitions created within the processes at the cabinet level.

6. Click the **Mapping** icon to map the SAP field names with the required NewgenONE process variables. The Mapping dialog appears.
   a. Manually enter the SAP field names associated with the SAP TCode and map them with the required NewgenONE process variables.
   b. Click **Add**.
   c. *(Optional)* To add multiple SAP field names, repeat steps 6 (a) to 6 (b).
   d. Click **Save** to confirm.
7. Click **Add**. The added definition now appears in the Defined Definition dropdown.
8. Click **Add Definition** to add the definition to the current workstep. The added definition now appears on the left pane.
9. *(Optional)* To add another definition, click **Add New** and repeat steps from 4 to 8.
10. Click **Save Changes** to confirm.

To modify an added definition, perform the following steps:

1. From the Associated Definition list, select the required SAP definition.
2. From the SAP Configuration dropdown list, select the required SAP configuration.
3. From the Defined Definition dropdown list, select the required SAP definition. Alternatively, you can click the **Add New Definition** icon to use a new SAP definition. For procedural details, see step 5 of Adding SAP definition.
4. Click **Modify** and then click **Save Changes**.
   The SAP definition gets modified.

To delete an added definition, select the required definition from the Associated Definition list and then click **Delete**. Click **Save Changes** to confirm.

Data Fields tab

In this tab, you can grant rights to read or modify the business variables.

Property	Description
Read	Select the checkbox to grant read right on the data field.
Modify	Select the checkbox to grant editing right on the data field.
Bulk	Select the checkbox to use the variable while processing the bulk workitems.

Activities

Activity is work that is performed in a business process.

For example, the second step of an account opening process involves manual checking and data entry through the scanned image of the application forms.

These are the different types of activities supported by NewgenONE Process Designer.

- Embedded subprocess
- Call activity
- Workdesk
- Case workdesk
- Receive
- Reply
- Email
- Export
- Query

To add an activity workstep, select **Activities** from the Toolbox, and drag the required item to the design area.

Embedded subprocess

An embedded subprocess is a simpler form of process. Independent subprocess workstep facilitates the easy designing and linking of business processes together. This feature allows the workitem automatic initiation for processing in a subprocess until which it remains suspended in the main process, and after its completion in the sub-process, it resumes it processing in the parent process.

The concept of subprocess is introduced to break down these complex processes into simpler tasks that you can perform independently. For example, an insurance company uses a process to renew the policy. When a customer requests to renew the policy, the company will check if the customer has a valid policy, and then initiate the process to renew the policy. You can create a validate policy subprocess that executes whenever there is a request to renew the policy.

When you drop the subprocess to the design area, it contains dummy start and end events. Dummy implies they are not part of the process execution and does not have any properties. Additionally, you can add up to 10 activities to the subprocess.

Call activity

This section discusses the various properties of the call activity workstep available in the NewgenONE Process Designer. The following are the ways to access the properties for a workstep from different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep, and select **Properties**.

A Properties dialog appears that comprises of the following tabs:

- Basic Details
- Initial Rules
- Requirements
- Attachments
- Forward Variable Mapping
- Reverse Variable Mapping
- Forward Doctype Mapping
- Reverse DocType Mapping
- Data Fields

Basic Details tab

This tab lets you configure the basic settings for the workstep.

Property	Description
Deployed Process Name	Choose a deployed process from the dropdown list.

For more information about the properties, see Basic details section.

Initial Rules tab

For details, see Initial rules section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Forward Variable Mapping tab

Forward variable mapping facilitates the transfer of data and documents from the workitem in the parent process to the corresponding workitem in the call activity.

To map the variables from the parent process to the current process, perform the following steps:

Ensure you have specified the deployed process name in the Basic Details tab.

1. Click **Add Variable(s)** on the Forward Variable Mapping tab. A dialog appears.
2. Select the variable you want to map. It can be a basic or extended variable.
   To select all the variables in the list, click **Select All**.
3. Then, click **Add**.
4. Select the required field to map with the added variable.
5. Click **Save Changes** to confirm.

Reverse Variable Mapping tab

The reverse mapping implies that the data of the selected variables (of the call activity) reflect in the corresponding mapped variables of the parent process.

To map the variables from the current process to the parent process, perform the following steps:

1. Click **Add Variable(s)** on the Reverse Variable Mapping tab. A dialog appears.
2. Select the variable you want to map. It can be a basic or extended variable.
   To select all the variables in the list, click **Select All**.
3. Then, click **Add**.
4. Select the required field to map with the added variable.
5. Click **Save Changes** to confirm.

Forward Doctype Mapping tab

Forward doctype mapping facilitates the transfer of data and documents from the workitem in the parent process to the corresponding workitem in the call activity.

To map the documents from the parent process to the current process, perform the following steps:

> Ensure you have specified the deployed process name in the Basic Details tab.

1. Click **Add Document(s)** on the Forward Document Mapping tab. A dialog appears.
2. Select the document you want to map.
   To select all the documents in the list, click **Select All**.
3. Then, click **Add**.
4. Select the required document to map from the dropdown.
5. Click **Save Changes** to confirm.

Reverse Doctype Mapping tab

The reverse doctype mapping facilitates the transfer back of data and documents from the workitem in the sub-process to the corresponding workitem in the parent process.

To map the documents from the current process to the parent process, perform the following steps:

1. Click **Add Document(s)** on the Reverse Document Mapping tab. A dialog appears.
2. Select the document you want to map.
   To select all the documents in the list, click **Select All**.
3. Then, click **Add**.
4. Select the required document to map from the dropdown.

5. Click **Save Changes** to confirm.

Data Fields tab

For details, see Data fields section.

Workdesk

With the help of the **Workdesk** workstep, you can explicitly sign in to the desktop to perform an intended operation. You can refer to such worksteps as manual worksteps.

Further, this section discusses the various properties of the workstep available in NewgenONE Process Designer. Following are the ways to access workstep properties in different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep.

A Properties dialog appears that comprises of the following tabs:

- Basic Details
- Initial Rules
- Entry Settings
- Requirements
- Attachments
- Workdesk
- Streams
- Options
- Data Fields

Basic Details tab

This tab lets you configure the basic settings for the workstep.

Property	Description
Associated Queue	Set the property to **Use Swimlane Queue** or **Create Own Queue**, and then click the corresponding edit button. Each workdesk is associated with a queue. By default, every workdesk uses the swimlane queue. For more information, see Associating queue with the workstep.

For more details about the properties, see Basic details section.

Initial Rules tab

For details, see Initial rules section.

Entry settings tab

This tab lets you set the entry criteria for the workstep.

To add a rule, perform the following steps:

1. Click **Add Rule** on the Entry Settings tab.
2. Enter the name of the rule.
3. Set the condition to always, if, or otherwise. After choosing the condition type, specify the variable, operator, and value.
4. Specify the operation type, variable, value, and operator using the dropdown. Following are the different operation types you can use in NewgenONE Process Designer:

Operation Type	Functionality	Description
Set	To set a variable (external, system modifiable, or queue) to a constant, value of a variable, result of an expression, or a fixed value.	All the modifiable system variables, external data, and queue variables appear in Field combo box. The Value combo box includes all the constants, all system variables, external data, and queue variables. Operators can be +, -, * or \.

Operation Type	Functionality	Description
Increase Priority	To increment the priority of the workitem.	Priority cannot be increased beyond 'Very High'. Thus if the priority of a workitem is already 'Very High' then this Action will not have any effect.
Decrease Priority	To decrement the priority of the workitem.	Priority cannot be decreased beyond 'Low'. Thus if the priority of a workitem is already 'Low' then this Action will not have any effect.
Trigger	To fire a trigger defined in the process.	All triggers defined in the process are available in the selection list.
Commit	To mark the current step as the 'Save Stage'.	It saves all the changes made since the last commit or rollback.
Assigned To	To assign the workitem to a specific user or a role.	Variable list displays all text type system, external data, and queue variables. You can select any variable that contains the name of the run-time user or can enter a fixed user name, by selecting the <constant> option.
Set Parent Data	To set data in the parent workitem in case of distributed workitem.	All the modifiable system variables, external data, and queue variables appear in Field combo box. The Value combo box includes all the constants, all system variables, external data, and queue variables. Operators can be +, -, * or \.
Call	To call an external function from the current workstep.	External functions defined through the Register Catalog menu option are available in Application-> Function selections. After selecting the function, the 'Map data' button appears that allows you to set the forward and backward mapping of the process variables and the function parameters.

Operation Type	Functionality	Description
Set and Execute	To call an external function from the current workstep, and storing the function result in the process variable.	All queue and external variables appear in the operand selection list. External functions defined through the Register Catalog menu option are available in Application-> Function selections. After selecting the function, the 'Map data' button appears that allows you to set the forward and backward mapping of the process variables and the function parameters.
Escalate to	To escalate the workitem status to a user or role, in case the workitem does not get deleted within the specified time. It also allows you to set multiple escalation levels.	Specify the user or role name to send the escalation mail. You can also enter the email id of the user. These can be specified by selecting a variable from the variable list or entering a fixed value, by selecting <constant>. The time range of the escalation can be set by entering the date followed by the number of days and hours. The Date selection displays a list of all date type variables in the process, and you can also enter a fixed date by selecting the <constant> option. The system keeps sending escalation mails to the specified user after workitem expiration time.
Escalate with Trigger	To escalate the workitem status by associating a Mail Trigger with expiry. This triggers a notification or escalation email to the supervisor or other participants, whenever the process workitem gets expired.	When a workitem does not completes within the specified time, email messages are sent to the supervisor or the team leader. Escalate To With Trigger operation allows you to draft a complete mail for escalating the workitem status rather than using a pre-defined email template. For more information, see Mail trigger.

5. Click **Add Rule** and then **Save Changes** to confirm.
   To delete an added rule, select the required action from the Rules list on the left and click **Delete**.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Workdesk tab

For details, see Workdesk section.

Streams tab

Streams are the predefined filters on a workstep that determines who the next person is to view the workitem. Stream definition is an elegant method for using a single workstep definition with different groups of people. It facilitates selective working based on the data values of an item. You can define multiple streams based on conditional criteria. The criteria can be anything such as physical locations, specific customers, priorities, and others.

To add a stream, perform the following steps:

1. Click **Add New Stream** on the Streams tab.
2. Enter the name of the stream.
3. Specify whether to apply the stream on **All Worklist** or **On Filter**.
    - If you chose **On Filter**, specify the filter condition.
    - Click + to add more filters.
4. Then, click **Add Stream** and **Save Changes**.
   To delete an added stream, select the required action from the Rules list on the left and click **Delete**.

Options tab

Ensure timely execution of workitems on a workstep by specifying their expiration time. For setting the expiry on the workstep, select **Expires After** option. Then, specify the date after which the work items on that workstep gets expired, and are routed to the target workstep. Else, select the **Never Expires** option if you don't want to specify any expiry date for the workstep.
The **Expires After** option lists all the date type variables in the current process. To set the expiry period, specify the number of days and hours after which the workitems get

expire. For example, the expiry date can be specified as 12 days after the entry date time. You can also specify a fixed value for days and hours, by selecting the <constant> option, or simply select a defined constant from the list, which is expected to have a valid integer value at the run-time.

Data Fields tab

For details, see Data fields section.

Case workdesk

The **Case Workdesk** workstep allows the process designer to associate a task with a workstep. So, that when the process comes to this workstep, you can perform the associated tasks.

Further, this section discusses the various properties of the workstep available in NewgenONE Process Designer. Following are the ways to access workstep properties in different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep.

A Properties dialog appears that comprises of the following tabs:

- Basic Details
- Initial Rules
- Entry Settings
- Requirements
- Attachments
- Workdesk
- Task
- Stream
- Options
- Data Fields

Basic Details tab

This tab lets you configure the basic details for the workstep.

Property	Description
Generate Summary Document	Select the checkbox to enable auto-generation of case summary document. The document, containing case details, is generated once the case workdesk is marked as complete and the work item is routed to the next workstep.
Mapped Document Type	Enter the name of the mapped document type. By default, the document is named in the format: Case Summary – Activity Name. This property is enabled only when you select the **Generate Summary Document** checkbox.

For more details about the properties, see Basic details section.

Initial Rules tab

For details, see Initial rules section.

Entry Settings tab

For details, see Entry settings section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Workdesk tab

For details, see Workdesk section.

Task tab

This tab lets you define properties for associating tasks with the case workdesk workstep. The Tasks list on the left displays the tasks associated with the workstep.

With the help of the process designer, you can select a specific user or group who has the right to work on that task at runtime. Then, map the task variables with the process variables. It implies that the data of the selected task variables are passed to the corresponding mapped variables of the process. Later, define rules to set pre-conditions to enable the initiation of a task. The system starts the task when the pre-conditions are met while executing the process.

Associate Tasks

To add in the case workdesk in the abstract view, perform the following steps:

1. Click the add icon + in added case workdesk, and select **Create New Task**.
2. Enter the name of the task in the provided space, and click **OK**.
3. To associate the task, select the required checkbox next to the task name in the list.
   Alternatively, go to the **Tasks** tab on the Properties dialog and click **Associate Task**. In the Associate Task dialog that appears, select the required tasks to associate and click **Associate Tasks**. For more details on task association, see Task Templates.

To associate user(s) with the task, perform the following steps:

1. Select the required task from the left pane and go to the **Users** tab.
2. Click **Associate Users/Groups**. The Associate User(s)/Group(s) dialog appears.
3. Select the required user or group from the list. You can also look for a particular user or group in the list using the search box. Apart from this, you can also apply filters to view users belonging to certain groups only. The chosen users and groups appear under the Selected User(s) and Group(s) section.
   To associate all the users, click **Select All**.
4. Click **Save Changes**.

To define rules, perform the following steps:

1. Go to the **Rules** tab.
2. Set the following task properties as per the requirement:
   - **Default State : Waiting** — Select this checkbox to set the default task status as waiting. On selecting the textbox, you can write the reason for setting the default status as waiting.
   - **Make Mandatory** — Select this checkbox to make the task mandatory. Once a task is made mandatory, it becomes compulsory to complete this task to move to the next step.

- **Allow Reassignment** — Select this checkbox to enable task reassignment. Once enabled, the end user to whom the task is assigned will be able to reassign the task to some other user.
- **Can Be Declined** — On selecting this checkbox, the user to whom the task is assigned, will be able to decline it.
- **Needs Approval** — On selecting this checkbox, the user can send the task for approval (if required) to a user or case manager. Once the approver approves the task only then the task will be marked completed otherwise it will be sent back to the task worker for re-work.

3. Click **Add Rule** to define rules. The Rule Definition dialog appears.
4. Set the condition to always, or if. After choosing the condition type, specify the variable, operator, and value.
5. Specify the operation type, variable, value, and operator using the dropdown. Following are the different operation types you can use in NewgenONE Process Designer:
    - **Set** — It allows the end user to set the value for a case variable.
    - **Set State: Ready** — In the set state, the user can make the status of the process ready for initiation.
    - **Make Mandatory** — This allows you to make the task mandatory based on the set condition.
    - **Make Optional** — It allows you to make the task optional based on the set condition.
    - **Auto Initiate** — It allows you to initiate the task automatically and assign it to a particular user. The username can be defined using process or case variables, process constants, queue variables, and static usernames based on your business requirement.
6. Click **Add Rule** and then **Save Changes**.

To manage rights, perform the following steps:

Navigate to the **Manage Right(s)** tab that allows you to grant read and modify permissions on the todo items, documents, exceptions, and forms. If these permissions are not given, then the end user working on Case Workdesk will not be able to view or modify the items while executing the process.

Streams tab

For details, see Streams section.

Options tab

For details, see Options section.

Data Fields tab

For details, see Data fields section.

Receive

With the help of **Receive** workstep, you can obtain a request from an external service in the form of a message.

This section discusses the various properties of the workstep available in NewgenONE Process Designer. Following are the ways to access workstep properties in different views:

- In the abstract view, click the ellipsis icon ⋮ in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep.

A Properties dialog appears that comprises of the following tabs:

- Basic Details
- Initial Rules
- Requirements
- Attachments
- Receive
- Data Fields

Basic Details tab

This tab lets you configure the basic settings for the workstep.

Property	Description
Associated Queue	Set the property to **Use Swimlane Queue** or **Create Own Queue**, and then click the corresponding edit button. Each workdesk is associated with a queue. By default, every workdesk uses the swimlane queue.

Property	Description
	For more information, see Associating queue with the workstep.

For more details about the properties, see Basic details section.

Initial Rules tab

For details, see Initial rules section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Receive tab

The following table describes the properties of Receive tab:

Property	Description
Invocation Type	Set the property to **Reply Immediate** or **Reply After Completion**. • If the user selects **Reply Immediate**, the system executes the workstep without waiting for the reply. • If the user selects **Reply After Completion**, the system waits for the reply before executing the workstep. Select the suitable reply workstep from the dropdown.

Data Fields tab

For details, see Data fields section.

Reply

The **Reply** workstep is used in conjunction with the **Receive** workstep. It is used to send a response to a request previously accepted through an inbound message (receive) activity. These responses are only meaningful for request-response interactions.

This section discusses the various properties of the workstep available in NewgenONE Process Designer. Following are the ways to access workstep properties in different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep.

A Properties dialog appears that comprises of the following tabs:

- Basic Details
- Entry Settings
- Requirements
- Attachments
- Output Variables

Basic Details tab

This tab lets you configure the basic details for the workstep.

Property	Description
Associated Queue	Set the property to **Use Swimlane Queue** or **Create Own Queue**, and then click the corresponding edit button. Each workdesk is associated with a queue. By default, every workdesk uses the swimlane queue. For more information, see Associating queue with the workstep.

For more details about the properties, see Basic details section.

Initial Rules tab

For details, see Initial rules section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Output Variables tab

This tab displays all the process variables including the queue, complex, and external variables (if an external database is associated). Select the checkbox next to the required variables in the list needed in the output.

Email

The **Email** workstep lets you print, fax, or email the documents. This section discusses the various properties of the **Email** workstep available in NewgenONE Process Designer.

The following are the ways to access the properties for a workstep from different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep, and select **Properties**.

A Properties dialog appears that comprises of the following tabs.

- Basic Details
- Entry Settings
- Requirements
- Attachments
- Send
- Data Fields

Basic Details tab

For details, see Basic details section.

Entry Settings tab

For details, see Entry settings section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Send tab

In this tab, you can configure the print, email, and fax settings. Apart from sending the different document types, you can also include the workitem status.

To configure the print settings, perform the following steps:

1. Go to the **Print** tab. A list of defined documents appears. You can additionally see Conversation and Audit Trail documents.
2. From the **Document Type** dropdown, click **Status** to add the workitem status, and then click **Add**. The Status now appears under the Document list.
3. Select the **Print** checkbox next to the required document you want to print.
4. Click **Save Changes** to confirm.

To configure the fax settings, perform the following steps:

1. Go to the **Fax** tab. A list of defined documents appears. You can additionally see the Conversation and Audit Trail documents in the list.
2. From the **Document Type** dropdown, click **Status** to add the workitem status, and then click **Add**. The Status now appears under the Document list.
3. Specify the fax number. You can either set the fax number to a variable or constant.
4. Select the **Print** checkbox next to the required document you want to print.
5. Click **Save Changes** to confirm.

To configure the email settings, perform the following steps:

1. Go to the **Email** tab. A list of defined documents appears. You can additionally see the Conversation document in the list.
2. From the email details including the sender, recipient, CC recipients, BCC recipients, and priority of the email.
3. Specify the subject of the email. You can also use variables in the email subject.
4. Specify the message of the email. You can also use variables in the email message.
5. From the **Document Type** dropdown, click **Status** to add the workitem status, and then click **Add**. The Status now appears under the Document list.
6. Specify the fax number. You can either set the fax number to a variable or constant.
7. Select the **Print** checkbox next to the required document you want to print.
8. Click **Save Changes** to confirm.

Data Fields tab

For details, see Data fields section.

Export

The **Export** workstep lets you export the workitem from a process into a CSV file.

This section discusses the various properties of the export workstep available in NewgenONE Process Designer. The following are the ways to access the properties for a workstep from different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep.

A Properties dialog appears that comprises of the following tabs:

- Basic Details
- Requirements
- Attachments
- Export

Basic Details tab

For details, see Basic details section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Export tab

The following table describes the properties of the Export tab:

Property	Description
Table Details tab	
Existing Table	Select to add an existing table in the table details.
Define Table	Select to add a new table data in the table details.
Table Name	Enter the name of the table.
Date Format	Choose the date format from the dropdown

Property	Description
Add Field	Click to add a new field and enter the following details. • Enter the name of the field. • Specify the type for the field. It can be text, float, integer, long, and date. • If you want to apply a constraint on the field, select the **Constraint** checkbox, and set it to the primary key or unique key. • Specify the length of the field. Then, click **Add**.
More Options	Click the ellipsis icon ••• to define field mapping. In the Mapping dialog that appears, enter the following details. • Specify the type of mapping. It can either be set to data or document. • Choose the mapping field from the dropdown. • Enter the length for the mapping field. • Select the **Quotes** checkbox based on your requirement. • Set the export alignment to left or right. Then, click **Save** to add changes.
File Details tab	
Field Name	Choose a field name from the dropdown. To add a new field, click **Add**.
CSV File Name	Enter the CSV file name.
Field Name	Enter the name of the field.
File Path	Enter the path for the file.
Order by	Choose a field from the dropdown based on which you want to sort.
File Type	Choose the type of file from the dropdown. It can be CSV, text, Dat, and Res.
Masked Value	Select the value from the dropdown.
Field Type	Set the type to variable or field length.
Field Separator	Enter the field separator.
File Move	Choose whether you want to move the file on a daily, weekly, or monthly basis.

Property	Description
Record No.	Enter the record number based on your requirement.
Sleep Time (Sec(s))	Specify the sleep time in seconds.
Generate Header	Select the checkbox to add header in the email while exporting.
Header String	Input the header string.
Footer String	Input the footer string.

Query

The **Query** workstep is a dangling workstep in a business process having no incoming or outgoing links. It serves the primary role of defining a view for the workitems when they are opened for the purpose of status tracking, from the query workdesk.

System users can search a workitem for a process using the search option. However, if another user, who is not a member, tries to open a searched workitem lying in a queue, or has been completed or discarded in the process, opens in the query workdesk settings defined in the **Query** workstep, of the currently logged-in user who is the member. Thus, the query workstep helps set constraints on the search operations, preventing the user from viewing confidential data that can be associated with a workitem.

Further, this section discusses the various properties of the workstep available in NewgenONE Process Designer. Following are the ways to access workstep properties in different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep.

A Properties dialog appears that comprises of the following tabs:

- Basic Details
- Requirements
- Attachments
- Workdesk
- Search Variables

- Search Results
- Data Fields

Basic Details tab

For details, see Basic details section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Workdesk tab

For details, see Workdesk section.

Search Variables tab

Search variables are the selected queue variables that can be used for searching the workitems during process execution. These search variables are visible to serve as the default search option in the Advanced Search bar. All users of a process can use these search variables from the advanced search bar.

To give search rights to a variable, select its corresponding checkbox under the Search Rights column and then click **Save**.

Search Results tab

Variables must also be specified in search results which are visible in the output on carrying out any search using search variables. These search variables are visible to serve as the default search option in the Advanced Search bar. All users for a process will be able to use these search variables and search results options from the Advanced Search bar.

To give search rights to a variable, select its corresponding checkbox under the Search Rights column and then click **Save**.

Data Fields tab

For details, see Data fields section.

Intermediate events

Intermediate events indicate any events that occur during a process. Such events affect the flow of the process but do not terminate or delete the process.

Following are the different types of intermediate events supported by NewgenONE Process Designer.

- Event
- JMS producer
- JMS consumer
- Timer event

Event

The **Event** workstep lets you re-initiate a process whenever the process receives a message from an external source.

This section discusses the various properties of the workstep available in NewgenONE Process Designer. The following are the ways to access the properties for a workstep from different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep, and select **Properties**.

A Properties dialog appears that comprises of the following tabs.

- Basic Details
- Requirements
- Attachments
- Message
- Data Fields

Basic Details tab

For details, see Basic details section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Message tab

This tab contains all the variables that have search rights provided under the default introduction in the process. The WebService Location textbox contains the location of the web service, which gets created when the server registers the process. Therefore, when you open the registered route, the location gets displayed in this textbox.

You can provide search rights on the process variables (exclude the complex variables) to make them searchable in the web service.

Data Fields tab

For details, see Data fields section.

JMS producer

The **JMS Producer** workstep allows the integration of a business process with any external application that exposes functionality in the form of web service or JMS message. It enables the external client to publish the message to the required destination to perform various operations like creating, saving, and completing workitems in a business process. The web service functionality enables the worksteps to invoke the methods of the remotely deployed web services.

This section discusses the various properties of the workstep available in NewgenONE Process Designer. The following are the ways to access the properties for a workstep from different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep, and select **Properties**.

A Properties dialog appears that comprises of the following tabs.

- Basic Details
- Entry Settings
- Requirements
- Attachments
- JMS Producer
- Data Fields

Basic Details tab

For details, see Basic details section.

Entry Settings tab

For details, see Entry settings section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

JMS Producer tab

This tab lets you configure the exchange of workitem data with external applications through JMS messages.

To configure JMS production server settings, perform the following steps:

1. Go to the **JMS Producer tab**.
2. Enter the IP address of the production server where the destinations are defined.
3. Enter the port ID for the production server on which the destination names (or message queues) are present.
4. Enter the type of the production server, whether WebSphere, WebLogic, JBoss, and JTS.
5. Specify the type of destination. It can be a topic or queue.
6. Enter the destination name in the textbox.
    - If you chose **Topic**, then enter the topic type destination names.
    - If you chose **Queue**, then enter the queue type destination names.

7. Enter the variables that will form a part of the JMS Producer using the **InsertVariable** button. All the queue variables and the external data variables that have been given the read access permissions on this workstep, along with all system variables, will be available in the Message list.
   All the variables added in the message get replaced by their actual values at run-time, in the XML to be sent to the specified JMS Destination.
8. Click **Save Changes**.

Data Fields tab

For details, see Data fields section.

JMS consumer

The **JMS Consumer** workstep is the opposite of the **JMS Producer** workstep. The **JMS Consumer** workstep consumes the JMS messages published by the external applications. MDBs (Message Driven Beans) are deployed on an Application Server, which consumes the messages from the destination and carries out operations like create, save, done, and save and done on the workitems in the process.

Further, this section discusses the various properties of the workstep available in NewgenONE Process Designer. The following are the ways to access the properties for a workstep from different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep, and select **Properties**.

A Properties dialog appears that comprises the following tabs.

- Basic Details
- Entry Settings
- Requirements
- Attachments
- JMS Consumer
- Data Fields

Basic Details tab

For details, see Basic details section.

Entry Details tab

For details, see Entry settings section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

JMS Consumer tab

This tab lets you configure the exchange of workitem data with external applications through JMS messages.

To import XML, perform the following steps:

1. Enter the destination name.
2. Click **Import XML** to write or paste the XML.
3. Then, click **Read XML**. A list of message data appears.

To map process variables with the message data, select the required message data and map it to the suitable process variable.

You can also grant search and update rights on the message data by clicking the required right checkbox(es) next to the particular data.

Data Fields tab

For details, see Data fields section.

Timer event

In a process, the workitems can be set on hold for a particular duration of time, during which they become inaccessible to any user of the system for processing. The **Timer Event** workstep is defined for the purpose of holding workitems for a specified time period. After the expiration of the hold period, the workitems are released back into the process.

Further, this section discusses the various properties of the workstep available in NewgenONE Process Designer. Following are the ways to access workstep properties in different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep.

A Properties dialog appears that comprises of the following tabs:

- Basic Details
- Entry Settings
- Requirements
- Attachments
- Workdesk
- Timer
- Reminder
- Data Fields

Basic Details tab

For details, see Basic details section.

Entry Details tab

For details, see Entry settings section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Workdesk tab

For details, see Workdesk section.

Timer tab

This tab lets you set the hold-until and manual unhold settings for a workstep. This helps to hold workitems on a workstep for specified time. As soon as workitem expires, it gets routed to the target workstep.

To define the timer settings, perform the following steps:

1. Enter **Hold Until** time. This field indicates the time duration for holding workitems in a workstep. You can define the time using the date type variable or through constant values, such as the number of days, hours, minutes, and seconds.
2. Set **Expiry** to the target workstep. This field refers to the workstep where the expired workitems get routed.
3. Select the **Target** checkbox to fire a trigger. These triggers are defined in the process.
4. In case of manual unhold, set the target activity to the required workstep. The manual unhold settings allow you to unhold the on-hold workitem before the defined turnaround time.
5. Select the **Trigger** checkbox to fire a trigger in the manual unhold and set it to the required trigger activity.
6. To define an event to unhold the on-hold workitem, set the trigger and the target activity for the defined event.
7. Click **Save** to confirm.

Reminder tab

This tab lets you set the reminder criteria for the workstep.

To create a reminder rule, perform the following steps:

1. Navigate to the **Rules** tab.
2. Click **Add Rule** to define a new rule.

3. Specify the condition for the rule. It can be set to always, if, or otherwise. After selecting the condition type, specify the variable, operator, and value using the corresponding dropdown.
4. Choose the type of operation you want to trigger if the specified condition gets satisfied. You can choose any of the following:
    - If you select **Define Mail**, then click the **Email** button and enter the From, To, CC, BCC, priority, subject, and body details for the email.
    - If you select **Select Mail Trigger**, then select the mail trigger from the dropdown list. For information on mail trigger, see Triggers.
5. Define the frequency for the reminder.
6. Enter the date, days, hours, minutes, and seconds based on which you want to execute the reminder.
7. Choose whether you want to set the calendar type to working day or holiday day.
8. Enter the repeat time for reminder in minutes.
9. Click **Add Rule** to confirm the changes.

Data Fields tab

For details, see Data fields section.

Gateways

In a workflow process, you need to define the various criteria for entering the routing sequence of the workitem. You can accomplish this by configuring the routing rules in a process.

For example, in an account opening process, once the workitem reaches data entry, the workitem needs to flow along alternate paths even if the data entry operator has raised any exception.

```
If InstrumentStatus = 'E' Then
Route To ReScan
If InstrumentStatus = 'N' Then
Route To Manager
```

Following are the different types of gateways supported by NewgenONE Process Designer.

- Inclusive Distribute

- Inclusive Collect
- Parallel Distribute
- Parallel Collect
- Data Based Exclusive

Inclusive distribute

The **Inclusive distribute** workstep allows the creation and distribution of workitems to collect a workstep. Hence, the users on those worksteps can process the workitem according to the rule specified on distribute workstep.

This section discusses the various properties of the workstep available in NewgenONE Process Designer. The following are the ways to access the properties for a workstep from different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep, and select **Properties**.

A Properties dialog appears that comprises the following tabs:

- Basic Details
- Requirements
- Attachments
- Distribute

Basic Details tab

For details, see Basic details section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Distribute tab

This tab lets you set the entry criteria for the end event.

To add a rule, perform the following steps:

1. Click **Add Rule** on the Entry Settings tab.
2. Enter the name of the rule.
3. Set the condition to always, if, or otherwise. After choosing the condition type, specify the variable, operator, and value.
4. Specify the operation type, variable, value, and operator using the dropdown. Following are the different operation types you can use in NewgenONE Process Designer:

Operation Type	Functionality	Description
Set	To set a variable (external, system modifiable, or queue) to a constant, value of a variable, result of an expression, or a fixed value.	All the modifiable system variables, external data, and queue variables appear in Field combo box. The Value combo box includes all the constants, all system variables, external data, and queue variables. Operators can be +, -, * or \.
Increase Priority	To increment the priority of the workitem	Priority cannot be increased beyond 'Very High'. Thus if the priority of a workitem is already 'Very High' then this Action will not have any effect.
Decrease Priority	To decrement the priority of the workitem	Priority cannot be decreased beyond 'Low'. Thus if the priority of a workitem is already 'Low' then this Action will not have any effect.
Trigger	To fire a trigger defined in the process	All triggers defined in the process are available in the selection list.
Commit	To mark the current step as the 'Save Stage'.	It saves all the changes made since the last commit or rollback.

Operation Type	Functionality	Description
Call	To call an external function from the current workstep.	External functions defined through the Register Catalog menu option are available in Application-> Function selections. After selecting the function, the 'Map data' button appears that allows you to set the forward and backward mapping of the process variables and the function parameters.
Set and Execute	To call an external function from the current workstep, and store the function result in the process variable.	All queue and external variables appear in the operand selection list. External functions defined through the Register Catalog menu option are available in Application-> Function selections. After selecting the function, the 'Map data' button appears that allows you to set the forward and backward mapping of the process variables and the function parameters.
Distribute to	To set the worksteps for distributing the workitems from a distribute workstep.	The workstep selection lists all the worksteps in the process having incoming links.

5. Click **Add Rule** and then **Save Changes** to confirm.
   To delete an added rule, select the required action from the Rules list on the left and click **Delete**.

Inclusive collect

The **Inclusive Collect** workstep lets you collect all the distributed instances back and merge them into a single instance for further routing in the process.

This section discusses the various properties of the workstep available in NewgenONE Process Designer. The following are the ways to access the properties for a workstep from different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep, and select **Properties**.

A Properties dialog appears that comprises the following tabs:

- Basic Details
- Requirements
- Attachments
- Collect

Basic Details tab

For details, see Basic details section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Collect tab

This tab lets you define the criteria for collecting the distributive instances. One instance of the distributed workitems can be defined as the Primary Instance, based on which the collection criteria may be defined. This primary instance can be defined by selecting one of the worksteps from which the instances are arriving into the collect workstep as Primary Workstep. Thus, the instance of the workitem arriving from that workstep will be treated as the primary instance at the time of collection.

To set the collection criteria, perform the following steps:

1. Go to the **Collect** tab.
2. Select the primary workstep from the dropdown.

> Only the worksteps that have an outgoing link to the Collect Workstep are available in the Primary Workstep list.

3. Select the distribute workstep from where the workitems arrive at the collect workstep.
4. Select the **Delete on Collect** checkbox to delete the distributed instances that are not processed.
5. Choose the collection criteria you want to apply:
    - **Wait for only Primary —** It indicates that the collect workstep collects the instances of the workitem until the primary instance arrives. After the arrival of the primary instance, it merges all the instances collected till then, and that merged workitem gets proceeds further in the process. While the remaining instances (if any) get aborted.
    - **Wait for Primary + Number of instances —** It indicates the collect workstep will keep collecting the instances of the workitem until the primary instance arrives. It then continues to collect instances until it reaches the specified count. It then merges all the collected instances and routes the merged workitem further in the process. While the remaining instances (if any) get aborted.
    - **Wait for Number of Instances —** It indicates that the collect workstep keeps collecting instances until it reaches a certain count specified in the No. Of Instances field. It then merges all the instances collected, and that merged workitem gets proceeds further in the process. While the remaining instances (if any) get aborted.

> The Primary Workstep selection is valid only in the case of Wait for only Primary and Wait for Primary + Number of instances options.

6. Click **OK** to save the changes.

Parallel distribute

The **Parallel Distribute** workstep allows the creation and distribution of multiple workitems into multiple worksteps. As a result, the users on these worksteps can process the item simultaneously.

This section discusses the various properties of the workstep available in NewgenONE Process Designer. The following are the ways to access the properties for a workstep from different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep, and select **Properties**.

A Properties dialog appears that comprises the following tabs:

- Basic Details
- Requirements
- Attachments
- Distribute

Basic Details tab

For details, see Basic details section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Distribute tab

For details, see Distribute section.

Parallel collect

The **Parallel Collect** workstep allows the creation and distribution of the workitem to collect workstep. Thus, the users on those worksteps can process the item according to the rule specified on distributed workstep.

This section discusses the various properties of the workstep available in NewgenONE Process Designer. The following are the ways to access the properties for a workstep from different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.

- In the BPMN view, click the **Settings** icon in the workstep, and select **Properties**.

A Properties dialog appears that comprises the following tabs.

- Basic Details
- Requirements
- Attachments
- Collect

Basic Details tab

For details, see Basic details section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Collect tab

This tab lets you define the criteria for collecting the distributive instances. To set the collection criteria, navigate to the **Collect** tab and specify the distribute workstep from where the workitems arrive at the collect workstep.
The rest of the properties such as collection criteria and number of instances are disabled.

Data based exclusive

The **Data Based Exclusive** workstep is used as an OR step in the process, from where the workitems take an alternate path depending on their data and the routing criteria defined for the workstep.

Further, this section discusses the various properties of the workstep available in NewgenONE Process Designer. Following are the ways to access workstep properties in different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep.

A Properties dialog appears that comprises of the following tabs:

- Basic Details
- Requirements
- Attachments
- Routing Criteria

Basic Details tab

For details, see Basic details section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Routing Criteria tab

Routing criteria is a set of rules based on which a workitem at a Data Based Exclusive workstep is routed to other worksteps in the process. There may be situations based on some conditions or value of any variable or status of the process or some operations have to be executed and the workitems are to be routed on alternate paths in a process. This definition of rules that govern the routing sequence of workitems is facilitated by the Data Based Exclusive workstep.

The Routing Criteria tab displays all the defined rules along with a default rule 'OTHERWISE ROUTE TO Previous Stage'. This default rule is defined for all decision types of worksteps to ensure that if none of the other defined rules are satisfied then the workitem is to be routed to the previous stage. You cannot delete the default rule. However, it can be modified to enter the target workstep to which the workitem is to be routed to incase all other rules fail.

To define routing criteria for the workstep, perform the following steps:

1. Click **Add Rule** on the **Routing Criteria** tab.

2. Enter the name of the rule.
3. Set the condition to always, if, or otherwise. After choosing the condition type, specify the variable, operator, and value.
4. Specify the operation type, variable, value, and operator using the dropdown. Following are the different operation types you can use in NewgenONE Process Designer:

Operation Type	Functionality	Description
Set	To set a variable (external, system modifiable, or queue) to a constant, value of a variable, result of an expression, or a fixed value.	All the modifiable system variables, external data, and queue variables appear in Field combo box. The Value combo box includes all the constants, all system variables, external data, and queue variables. Operators can be +, -, * or \.
Increase Priority	To increment the priority of the workitem	Priority cannot be increased beyond 'Very High'. Thus if the priority of a workitem is already 'Very High' then this Action will not have any effect.
Decrease Priority	To decrement the priority of the workitem	Priority cannot be decreased beyond 'Low'. Thus if the priority of a workitem is already 'Low' then this Action will not have any effect.
Trigger	To fire a trigger defined in the process	All triggers defined in the process are available in the selection list.
Commit	To mark the current step as the 'Save Stage'.	It saves all the changes made since the last commit or rollback.
Assigned To	To assign the workitem to a specific user or a role.	Variable list displays all text type system, external data, and queue variables. You can select any variable that contains the name of the run-time user or can enter a fixed user name, by selecting the <constant> option. The list also contains an entry named ROLE to specify the role name. In order to discretely enter the role within a group, you can enter the group name followed by a dot, followed by the role name. For example, <GroupName>.<RoleName>.

Operation Type	Functionality	Description
Set Parent Data	To set data in the parent workitem in case of distributed workitem.	All the modifiable system variables, external data, and queue variables appear in Field combo box. The Value combo box includes all the constants, all system variables, external data, and queue variables. Operators can be +, -, * or \.
Call	To call an external function from the current workstep.	External functions defined through the Register Catalog menu option are available in Application-> Function selections. After selecting the function, the 'Map data' button appears that allows you to set the forward and backward mapping of the process variables and the function parameters.
Set and Execute	To call an external function from the current workstep, and store the function result in the process variable.	All queue and external variables appear in the operand selection list. External functions defined through the Register Catalog menu option are available in Application-> Function selections. After selecting the function, the 'Map data' button appears that allows you to set the forward and backward mapping of the process variables and the function parameters.
Reinitiate	To re-initiate the workitem in the process	This action takes the workitem back to the Work-Introduction step, initiating it again into the process.
Rollback	To rollback the workitem to the last 'Save Stage' in the process.	If no action is committed in the process, before the Rollback operation. Then, in such a case, the workitem gets rolled back to the Work-Introduction step.

5. Click **Add Rule** and then **Save Changes** to confirm.
   To delete an added rule, select the required action from the Rules list on the left and click **Delete**.

Integration points

An integration point allows you to interact with other applications.

- **OMS Adapter**: This allows you to connect with Newgen's CCM. For example, in an account opening process, once you open an account before marking the workitem complete, you need to send the Welcome kit to the customer. Using this adapter, the Welcome kit template created in CCM is used and sent to the customer.
- **DMS adapter**: This allows you to archive the documents attached during the workitem life cycle in the document management system. In the account opening process, it is mandatory to archive all the documents submitted by the customer for security and future usage purposes.
- **Business rule**: This is a connector to the rule management system. Within the process, if you need to take certain decisions based on this rule then you can use this connector.
  For example, in a loan approval process, the application gets approved only when the applicant's salary is greater than a certain amount and CIBIL is between 500 to 900. These rules get created in the BRMS and later attached to the process using the business rule.

These are the different types of integration points supported by NewgenONE Process Designer:

- Data Exchange
- Web Service
- DMS Adapter
- OMS Adapter
- SAP Adapter
- Robot Workdesk
- Business Rule

Data exchange

The **Data Exchange** workstep can be used in both generic and RPA processes. The objective of this activity is to enable low code functionalities by allowing users to

configure and design data exchange for exchanging data with various data sources. Data exchange is carried out between the selected database entities, their identified data fields, and corresponding process variables.

The **Data Exchange** workstep indicates the successful completion of the import or export of data in the process. There are multiple exits for the process.

Further, this section discusses the various properties of the workstep available in NewgenONE Process Designer. Following are the ways to access workstep properties in different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep.

A Properties dialog appears that comprises of the following tabs:

- Basic Details
- Data Exchange
- Requirements
- Attachments
- Data Fields

Basic Details tab

For details, see Basic details section.

Data Exchange tab

This tab lets you test the cabinet to check whether a successful connection is established with the data source. Data exchange supports queue variables, external variables, complex variables, nested complex variables, and more.

You can perform the import and export operations only once you log in to the cabinet.

Data Exchange is performed in two ways:

- Loggedin Cabinet — In this case, the data exchange is done in the same cabinet. As the cabinet is in a logged-in status, the cabinet name textbox and test connection button are disabled.
- Other Cabinet — In this, the **Loggedin Cabinet** is in an unchecked state. If the user wants to use the other cabinet rather than the logged-in cabinet, then the

checkbox will be unchecked. Here, the user adds the cabinet name and checks the connection using the **Test Connection** button. Both the cabinet name textbox and test connection button work in a parallel manner.

To perform import and export operations, perform the following steps:

The export operation allows you to map the data of the process variable into the data exchange table. While the import operation allows you to map the data of the data exchange table with the process variables.

1. Select the type of operation you want to perform. In this case, select **Import** or **Export** respectively.
2. Click **Add New**. A new operation gets added to the list.
3. In the Properties pane on the right, select a suitable variable from the list where you want to store the row count. The dropdown list shows the variables of integer and float variables.
4. Select the type of variable. It can be any of the following:
    - **IsComplex** — Select this option to export complex variable data and then select the required complex variable from the list.
    - **IsNested** — Select this option to export nested variable data and then select the required nested variable from the list.
    - **Update if Exist** — Select this option to update the existing data in the table.
5. Select the variable where you want to export or import the data.
6. You can select more than one data exchange table in case you chose isNested variable.
7. In the Mapping section, you can perform the mapping of process variables. To do this, add the data exchange table to map it with the columns and variables.
8. In the Table Relation section, you can add the relation data exchange tables with the process variables. To do this, add the data exchange table one and then add column and process variables accordingly for mapping.
9. In the Filter section, you can add queries on the basis of which export of data can be done.
10. Click **Save Changes** to confirm.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Data Fields tab

For details, see Data fields section.

Web service

The **Web Service** workstep enables you to invoke an external webservice in the current workflow process. Using this workstep, you can invoke a web method of an existing web service in the current workstep. When the workitem comes on this workstep, the web service gets invoked for all the workitems either synchronously or asynchronously.

Further, this section discusses the various properties of the workstep available in NewgenONE Process Designer. Following are the ways to access workstep properties in different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep.

A Properties dialog appears that comprises of the following tabs:

- Basic Details
- Entry Settings
- Requirements
- Attachments
- Webservice
- Data Fields

Basic Details tab

This tab lets you configure the basic settings for the workstep.

Property	Description
Webservice Type	Choose the type of web service from the dropdown. The available options are webservice (SOAP), webservice (REST),

Property	Description
	response consumer JMS, response consumer SOAP, and request consumer SOAP. By default, the SOAP service configuration is disabled. To enable the SOAP service configuration, refer to the *Automation Studio* section of the *NewgenONE Configuration Guide*.

For more details about the properties, see Basic details section.

Initial Rules tab

For details, see Initial rules section.

Entry Settings tab

For details, see Entry settings section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Web service tab

This section describes the web service settings depending on your chosen web service type.

Webservice(SOAP)

This section describes the steps to configure the web service (SOAP) settings.

By default, the SOAP service configuration is disabled. To enable the SOAP service configuration, refer to the *Automation Studio* section of the *NewgenONE Configuration Guide*.

To associate web service and method, perform the following steps:

1. Select the webservice you want to associate with the workstep.
2. Then, select the corresponding web service method to associate with the workstep.

3. Click **Associate**.
   The associated web service and method gets listed under the Associated Web services and Methods section.

To view and set mapping for the associated web service and method, perform the following steps:

1. From the Associated Web services and Methods section, click the view mapping button next to the web service method. A new pane appears on the right.
2. Set the **Invocation Type** to any of the following options. The invocation type indicates the technique to invoke the web service methods.
   - **Fire and Forget** — In this type of invocation, the server simply invokes the web service and processes the workitem further in the process. It will not wait for any status or response from the web service.
   - **Synchronous** — In this type of invocation, the server invokes the web service method in a synchronous manner. In this technique, the server blocks the workstep, until the web service method executes successfully and receives a response.
   - **Asynchronous** — In this type of invocation, the server invokes the specified web service method in an asynchronous manner. In this technique, the server does not wait for the response and processes further in the process. The workitem gets updated only on receiving the web service response.
3. Set the **Time Out** property to the required time (in seconds). This property defines the response time-out interval for the web service method.
4. To set forward mapping, go to the **Forward Mapping** tab. This tab is opened, by default.
   In this tab, you can map the soap input parameters to the current process variables.
5. To set reverse mapping, go to the **Reverse Mapping** tab.
   In this tab, you can map the current process variables to the required soap output parameters.
6. Then, click **Save Changes** to confirm.

Web service(REST)

This section describes the steps to configure the web service (REST) settings.

To associate web service method, perform the following steps:

1. Select the web service method you want to associate with the workstep.

2. Click **Associate**.
   The associated web service method gets listed under the Associated Webservices and Methods section.

To view and set mapping for the associated web service method, perform the following steps:

1. From the Associated Webservices and Methods section, click the view mapping button next to the web service method. A new pane appears on the right.
2. Set the **Time Out** property to the required time (in seconds). This property defines the response time-out interval for the web service method.
3. To set forward mapping, go to the **Forward Mapping** tab. This tab is opened, by default.
   In this tab, you can map the rest input parameters to the current process variables.
4. To set reverse mapping, go to the **Reverse Mapping** tab.
   In this tab, you can map the current process variables to the required rest output parameters.
5. Then, click **Save Changes** to confirm.

Response Consumer JMS

For configuration details, see JMS consumer.

Data Fields tab

For details, see Data fields section.

DMS adapter

The **DMS Adapter** workstep allows you to archive the workitem data and document it in the underlying document management system.

Further, this section discusses the various properties of the workstep available in NewgenONE Process Designer. Following are the ways to access workstep properties in different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.

- In the BPMN view, click the **Settings** icon in the workstep.

A Properties dialog appears that comprises of the following tabs:

- Basic Details
- Entry Settings
- Requirements
- Attachments
- Archive
- Data Fields

Basic Details tab

For details, see Basic details section.

Entry Settings tab

For details, see Entry settings section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Archive tab

This tab lets you configure the archive settings for the document management system.

To configure the archive settings, perform the following steps:

1. Select the cabinet name from the dropdown.
2. Enter the user credentials.
3. Click **Connect** to establish a connection.
4. Select the variable to insert from the Include Variables dropdown and click **Add**.
   The added variables appear in the Content section.
5. Then, associate the required data class from the options available.
6. Click icon to map the associated fields with the process variables.
   The associated fields vary based on the chosen data class.
7. Select the **Delete Workitem Audit** checkbox to clear the audit log for workitem.

8. Then, associate the data class with the required document types.
9. Again, click icon to map the associated fields with the process variables.
10. Then, click **Save Changes**.

Data Fields tab

For details, see Data fields section.

OMS adapter

The **OMS Adaptor** workdesk enables the process designer to connect with Newgen's CCM (Customer Communication Management) suite to generate on-demand personalized communication and deliver consistent communications across multiple channels.

Further, this section discusses the various properties of the workstep available in NewgenONE Process Designer. Following are the ways to access workstep properties in different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep.

A Properties dialog appears that comprises of the following tabs:

- Basic Details
- Entry Settings
- Requirements
- Attachments
- Templates
- Data Fields

Basic Details tab

For details, see Basic details section.

Entry Settings tab

For details, see Entry settings section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Templates tab

This tab allows you to map the template variables with the current process variables.

To map template variables with the process variables, perform the following steps:

1. Go to the **Templates** tab. The options to configure the OMS template appear.
2. Click **OmniOMS Configuration**, specify the following fields:

Field	Description
Protocol Type	Select the required protocol from the dropdown list. It can either be set to *http* or *https*.
Domain Name / IP Address	Enter the domain name or IP address of the OMS server. For example • Domain Name: *sample.newgendocker.com* • IP Address: *127.0.0.1*
Port ID	Enter the port number of the server where the OMS services are running. The Port ID is only necessary if an IP address is specified in the Domain Name / IP Address field.

3. Click **Get Cabinets** to fetch the cabinet list and specify the following fields:

Field	Description
Cabinet	Select the desired OMS cabinet from the cabinet.
Username	Enter the username of the selected cabinet.
Password	Enter the password of the above stated user.

4. Click **Connect** to establish a connection**.**
5. Click **Select Templates** to expand the section, then specify the following fields:

Field	Description
Category	Select the required template category.
Communication Group	Select the communication group to which you want to send the batch communication.
Template Type	Select any of the following template types from the dropdown list: • PDF • SMS • WhatsApp • Email Select **All** to list all the above-stated templates in the Associated template section.
Template Style	Select the required template style from the dropdown list.

The selected category appears in the Associated Templates section. The following icons appear against the selected templates:

Icon	Description
Preview icon	Click this icon to preview the selected template.
View Mapping icon	Click this icon to define the mapping for the selected template. For further procedure, see step 6.
More Options	Properties — Click this option to view the selected template's properties, such as product name, category name, report name, communication group name, description, and version number. Delete — Click the delete icon to delete the selected template from the Associated Templates section.

6. Click the view mapping icon . The Define Mapping dialog appears.
7. Map the required template with the current process variables as follows:
   a. Click the **Forward Mapping** tab. This tab is opened, by default.
   b. Under the **Template Variables** column, select the checkbox against the required variable to map.

c. Under the **Current Process Variable(s)** column, select the required process variable from the dropdown list.
d. In the **Timeout** field, specify the timeout period (in seconds) for the template variables.

8. Map the required template with the current process document:
   a. Click the **Document Mapping** tab.
   b. Under the **Current Process Document(s)** column, select the required document for the template from the dropdown list.
   c. In the **Timeout** field, specify the timeout period (in seconds) for the template variables.
9. Click **OK** to confirm.
10. Click **Save Changes** to save the defined configurations.

Data Fields tab

For details, see Data fields section.

SAP adapter

SAP is one of the most widely used Enterprise Resource Planning (ERP) platforms used across enterprises. All different business applications developed on the NewgenONE platform, such as accounts payable, accounts receivable, and expense management require integration with SAP for approval, purchase order generation, and invoice processing.

The SAP Adapter workstep facilitates seamless integration with SAP ERP. This adapter helps the exchange of data with SAP ERP efficiently. With the SAP Adapter workstep, you can configure the Remote Enabled Function Modules and Business Application Programming Interfaces (BAPIs) within the process at design time.

The following are the prerequisites for using the SAP adapter:

- Run the SAP Add-Ins installer. For more information, see *NewgenONE SAP Add-on Installation Guide*.
- Configure the SAP details and functions in the SAP tab of the Service Catalog. For more information, see SAP.

Further, this section discusses the various properties of the workstep available in NewgenONE Process Designer. Following are the ways to access workstep properties in different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep.

A Properties dialog appears that comprises of the following tabs:

- Basic Details
- Entry Settings
- Requirements
- Attachments
- SAP
- Data Fields

Basic Details tab

For details, see Basic details section.

Entry Settings tab

For details, see Entry settings section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

SAP tab

Typically, an SAP function consists of three types of parameters — input, output, and table parameters. In context with NewgenONE Process Designer, the role of these parameters is as follows:

- **Input parameters** — SAP variables that accept inputs from the NewgenONE process variables.

- **Output parameters** — SAP variables that provide inputs to the NewgenONE process variables.
- **Table parameters** — SAP variables that are of complex and array data types. They can either accept or provide inputs to the NewgenONE process variables having the same variable definition.

The SAP tab facilitates the mapping of SAP function parameters with the NewgenONE process variables. To do this, perform the following steps:

1. From the **Registered Functions** dropdown, select the required registered function.
2. On selection, the SAP Configuration field automatically fills with a value based on the chosen registered function.
3. From the **SAP User Name** dropdown, select the required variable containing the SAP username value.
4. Navigate to the required subtab to map the NewgenONE process variables with the SAP parameters
    a. To import the data from the process variables to the input parameters of the SAP function, go to the **Input** subtab. Here, you can see a list of SAP input parameters available in the chosen function, along with their corresponding parent names, if any. A parent name is the name of an SAP complex variable structure. It appears only when the SAP import parameter is a child of such a variable structure. You can then map the required NewgenONE process variables with the SAP input parameters.
    b. To export the data from the process variables to the export parameters of the SAP function, go to the **Output** subtab. Here, you can see a list of SAP output parameters available in the chosen function, along with their corresponding parent names, if any. A parent name is the name of an SAP complex variable structure. It appears only when the SAP output parameter is a child of such a variable structure. You can then map the required NewgenONE process variables with the SAP output parameters.
    c. To import or export the data from the process variables to the SAP function parameters, go to the **Table** subtab. Here, you can see a list of complex and array data types available in the chosen SAP function. You can determine whether to use the table parameter as an input or output parameter by selecting the corresponding **Import** or **Output** checkbox. You can then map the NewgenONE process variables to the SAP table parameters if they have the same variable definition, members, and data types. Also, the names of the

data objects used to create the process variables must match with the SAP table parameters.

5. Click **Save Changes** to confirm.

Data Fields tab

For details, see Data fields section.

Robot workdesk

The **Robot Workdesk** workstep allows you to integrate the process with Newgen's RPA (Robotic Process Automation) solution framework and automate tasks using recorded scripts.

Further, this section discusses the various properties of the workstep available in NewgenONE Process Designer. Following are the ways to access workstep properties in different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep.

A Properties dialog appears that comprises of the following tabs:

- Basic Details
- Initial Rules
- Entry Settings
- Requirements
- Attachments
- Workdesk
- Options
- Data Fields

Basic Details tab

For dteails, see Basic details section.

Initial Rules tab

For details, see Initial rules section.

Entry Settings tab

For details, see Entry settings section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Workdesk tab

This tab enables you to view the todo list, actions, exception(s), and document(s), and enable the scan tool along with the selected activity. The configuration of the workdesk facilitates the run-time display of the workdesk for the users working on workitems of this workstep.

Following are the different tabs available:

- Document
- Scan

Document

Grant document rights to the chosen workstep or activity by navigating to the **Document** tab and clicking the **Document** checkbox. The document rights vary depending on the worksteps or activities. View, modify, delete, download, and print are the available document rights.

In case, there are no documents added to the process, click **Define**. For procedural details, see Document types.

Select the required document rights checkbox(es) corresponding to the particular document type.

Scan

Scan actions are a set of actions triggered when you add the required document type to the workitem. This helps in setting the variables to specific fixed values, constants, or values of other variables.

To enable scan action on a document, perform the following steps:

1. Navigate to the **Scan** tab.
2. Select the **Scan Tool** checkbox.
3. Select the checkbox to provide **additional scan rights** on the corresponding document.
4. Click **Scan**. The Scan Action dialog appears.
5. Set a variable against a fixed or constant value, or another variable. Click **Add** to specify another variable.
6. Click **OK** and then **Save Changes** to confirm.

Options tab

For details, see Options section.

Data Fields tab

For details, see Data fields section.

Business rule

The **Business Rule** workstep allows you to define business rules for the activities.

This section discusses the various properties of the workstep available in NewgenONE Process Designer. The following are the ways to access the properties for a workstep from different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep, and select **Properties**.

A Properties dialog appears that comprises the following tabs:

- Basic Details
- Entry Settings
- Requirements
- Attachments
- Business Rules
- Data Fields

Basic Details tab

For details, see Basic details section.

Entry Settings tab

For details, see Entry settings section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Business Rules tab

This tab lets you define the business rules for the activity.

To apply the business rule, perform the following steps:

1. Choose the type of web service. It can be either SOAP or Rest.

   By default, the SOAP service configuration is disabled. To enable the SOAP service configuration, refer to the *Automation Studio* section of the *NewgenONE Configuration Guide*.

2. Select the rule flow name and its version from the respective dropdowns, and click **Associate**. These rule flow names are defined in the Rule Builder.
   The added rule flow appears under the Associated Rule Package/Flow section.
3. Select the rule package name and its version from the respective dropdowns, and click **Associate**. These rule flow packages are defined in the Rule Builder.
   The added rule package appears under the Associated Rule Package/Flow section.

To view and set mapping for the associated rule flow or package, perform the following steps:

1. From the Associated Rule Package/Flow section, click the **View mapping** button next to the required rule flow or package. A new pane appears on the right.
2. Under the Invocation Type Time Out section, set the **Synchronous** property to the required time (in seconds). This property defines the response time-out interval for the business rule parameters.
    - The minimum response time-out is 0 seconds.
    - The maximum response time-out is 99 seconds.
3. To set forward mapping, go to the **Forward Mapping** tab. This tab is opened, by default.
   In this tab, you can map the business rule input parameters to the current process variables.
4. To set reverse mapping, go to the **Reverse Mapping** tab. In this tab, you can map the current process variables to the required business rule output parameters.
5. Then, click **Save** to confirm.

Data Fields tab

For details, see Data fields section.

Artifacts

These are the different types of artifacts supported by NewgenONE Process Designer:

> These worksteps or activities are only available in the BPMN view.

- Text Annotations
- Group Box
- Data Objects
- Message

Text annotations

The **Text Annotations** workstep is one of the standard artifacts used in the BPMN view. It is used to write additional information and explanation about the elements within a process. However, they do not affect the process execution.

To use text annotation in a process, perform the following steps:

1. From the **ToolBox** on the left, under **Artifacts**, select **Text Annotations**.
2. Drag-drop **Text Annotations** to the design area.
3. Click the **Edit** icon on the text annotation.
4. Input the comment and hit **Enter**.

Group box

The **Group Box** workstep lets you define a set of activities for the same individual user or group of users and activities within it are executed at the same time.

To use a group box in a process, perform the following steps:

1. From the **ToolBox** on the left, under **Artifacts**, select **Group Box**.
2. Drag-drop **Group Box** to the design area.
3. Then, add other worksteps or activities to the group box.

- You can add only the following worksteps or activities to the group box: start event, database exclusive, workdesk, case workdesk, webservice, query, and artifacts.
- A **Group Box** cannot be overlapped between two swimlanes.

Data object

The Data Object workstep lets you store information about the object's documents and more without impacting the process execution.

To use a data object, perform the following steps:

1. From the **ToolBox** on the left, under **Artifacts**, select **Data Object**.

2. Drag-drop **Data Object** to the design area.
3. Link it with any activity in the process.

Message

The **Message** workstep represents the content of a communication between two participants and does not have any impact on the process execution.

To use a data object, perform the following steps:

1. From the **ToolBox** on the left, under **Artifacts**, select **Message**.
2. Drag-drop **Message** to the design area.
3. Link it with any activity in the process.

Task templates

Task templates enable you to create ad-hoc activities within a process. A task dependency might vary within the process, which you can execute at any time as required. You can also specify whether the task is optional or mandatory based on your requirement.

> The task templates category is only available in the BPMN view.

These are the different types of task templates supported by NewgenONE Process Designer:

- New Task
- Process task

New Task

With the help of New Task, you can create an ad-hoc task within a process. The task may or may not be dependent on another task within the process and can be executed at any time based on the requirements.

To create a new task, perform the following steps:

1. Select a process in which you want to add a task from the Processes tab.
2. On the Process Modeling page that appears, click **BPMN View**.
3. On the Process Flow tab, click **Task Templates** and drag **Add Task** on the tasklane.
   A new task is created.

To configure the properties of the workstep, click the Settings icon in the workstep, and then select **Properties**. This opens up a Properties dialog that comprises the following tabs:

- Tasks
- Data
- Options
- Escalation rules

Tasks tab

This tab lets you configure the basic settings of the workstep.

Field	Description
Description	Provide information about the task.
Goal	Specify the goal for the task.
Instructions	Specify the instructions to complete the task.
Repeatable	Select to use this task multiple times. Else, you can use the task only once.
Notify by email	Select to send the task notifications to the registered email.
Turnaround time	Specify the turnaround time for the task completion. Enter the time in days, hours, and minutes using working days or calendar days.
Cost (in $)	Specify the cost to complete the task in dollars.
Task Advisor	Specify the advisors for the task. Click the ... or + icon. In the Users dialog that appears, select the users you want to appoint as task advisors, and then click **Save Changes** to confirm.

Data tab

The Data tab allows you to create the data for the task and define its variables using forms.

Under the Forms section, select the type of form you want to use. It can be any of the following:

- **HTML Form** — Use this option to use the default HTML form. Click Preview HTML Form to view the form.
- **Form** — Use this option to import the form from the system or add a new form.
  - Click **Import From System** to use a form stored on your local system.
  - Click **Add New Form** to create a new form. On clicking this option, the Form Builder dialog appears. Here, you can design your form and use it later for the task.

> For more information, refer to *NewgenONE Interface Designer User Guide*.

To add variable definition, perform the following steps:

1. Enter the name of the variable.
2. Select the data type for the variable from the dropdown list. It can be text, float, integer, long, or date.
3. Enter the display name for the variable.

> This field is disabled in case you select the Form type.

4. Select the control type for the variable. It can be text, text area, or combo box.

> This field is disabled in case you select the Form type.

5. Click **Add Variable**. The variable gets added.
6. Click **Save Changes** to confirm.
   OR,
   Click **Save as Global Template** to save the defined data as a global template. It means the definition is available across the cabinet. Thus, it can be used by any user for any process.

Options tab

For details, see Options section.

Escalation Rule(s) tab

The Escalation Rules tab defines the escalation rules for a task that triggers on breaching the task deadline.

To define an escalation rule, perform the following steps:

1. Navigate to the **Escalation Rule(s)** tab.
2. Click **Add Rules**. The Escalation Rule(s) dialog appears.
3. Under the Escalation Details section, specify the time period after which the escalation gets invoked.
    - Specify the date, the number of days, hours, minutes, seconds, and the type of calendar Type (working or calendar day) after which you want to escalate the task.
      You can also enter a fixed value for the date, number of days, hours, minutes, and seconds by selecting the <constant> option.
4. Under the Mail Template section, define the mail template to send to the supervisor or team leader for the escalated task.
    - Enter the mail details such as From, To, CC, BCC, Priority, Subject, and Message.
5. Click **Save Changes** to confirm. The escalation rule gets added.
   OR,
   Click **Save as Global Template** to save the rule as a global template. It means the rule definition is available across the cabinet. Thus, it can be used by any user for any process.

Process task

A process task allows you to initiate and link another process as a child process to the main process or case. At the run time, a case manager may require to further initiate the independent processes and link them to the main process or case for processing information.

In such a situation, the process task enables the case manager to initiate the subprocesses as independent or dependent processes to the case. In this way, you can exchange the data and documents between the child and the main process.

To create a process task, perform the following steps:

1. Select a process in which you want to add a process task from the Processes tab.
2. On the Process Modeling page that appears, click **BPMN View**.
3. On the Process Flow tab, click **Task Templates** and drag **Process Task** on the tasklane.
   A new process task is created.

To configure the properties of the workstep, click the Settings icon in the workstep, and then select **Properties**. This opens up a Properties dialog that comprises the following tabs:

- Task Details
- Forward Variable Mapping
- Reverse Variable Mapping
- Forward DocType Mapping
- Reverse DocType Mapping

Tasks details tab

This tab lets you configure the basic settings of the workstep.

Field	Description
Type	Select a suitable type for the task. It can be any of the following: • **Asynchronous** – Use this type to initiate a subprocess in asynchronous mode i.e. the completion of the initiated child process does not have a dependency on the case. The case can be completed even if the child's workitem is not completed. • **Synchronous** – Use this type to initiate a subprocess in synchronous mode i.e. the completion of the initiated child process impacts the case. Additionally, the case does not get completed till the initiated child workitem gets completed. • **User Monitored Synchronous** – Use this type to allow the case manager to initiate a task and assign it to the case worker or participant as a normal task. The task worker works on the task and if required initiates the subprocess based on the requirements. Once the child process gets completed, the information gets synchronized back at the task level and then the task worker can process that information and complete the underlying task. The completion of the initiated child process impacts the case. Additionally, the case does not get completed till the initiated child workitem gets completed.
Select Registered Process	Select a suitable registered process from the list.
Description	Provide information about the task.
Goal	Specify the goal for the task.
Instructions	Specify the instructions to complete the task.
Notify by email	Select to send the task notifications to the registered email.
Turnaround time	Specify the turnaround time for the task completion. Enter the time in days, hours, and minutes using working days or calendar days.
Cost (in $)	Specify the cost to complete the task in dollars.
Task Advisor	Specify the advisors for the task. Click the ... or + icon. In the Users dialog that appears, select the users you want to appoint as task advisors, and then click **Save Changes** to confirm.

Forward variable mapping tab

For details, see Forward variable mapping section.

Reverse variable mapping tab

For details, see Reverse variable mapping section.

Forward DocType Mapping

For details, see Forward document mapping section.

Reverse DocType Mapping

For details, see Reverse DocType mapping section.

End events

NewgenONE provides a feature of linking two separate processes through the **End Event** workstep. Thus, the completion of a workitem in one process automatically creates and initiates a workitem in the process which is linked to the process End Event workstep. Likewise, the workitem data in terms of variable data and documents pass from the parent process to the linked child process. The **End Event** workstep indicates the successful completion of a workitem in the process. There can be multiple process exits.

Every workflow process must contain at least one exit point to signify the successful execution of workitem in a process. You can define the exit points in a process through the **End Event** workstep.

For example, you can define the exit workstep for an account opening process from which another process for the dispatch of various documents, including bank account number, debit card, and cheque book, gets triggered.

You can also define a **Terminate Event** workstep to signify the abnormal completion of workitems. In the account opening process, abnormal completion is caused due to the input of wrong details in the application form or when the manager rejects the form.

These are the different types of gateways supported by NewgenONE Process Designer.

- End Event
- Terminate Event
- Message End

End event

This section discusses the various properties of the workstep available in NewgenONE Process Designer. The following are the ways to access the properties for a workstep from different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep, and select **Properties**.

A Properties dialog appears that comprises the following tabs.

- Basic Details
- Entry Settings
- Requirements
- Attachments
- Workdesk
- Data Fields

Basic Details tab

For details, see Basic details section.

Entry Settings tab

For details, see Entry settings section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Workdesk tab

For details, see Workdesk section.

Data Fields tab

For details, see Data fields section.

Terminate event

The **Terminate Event** workstep allows you to discard the workitems in a process through routing.

This section discusses the various properties of the workstep available in NewgenONE Process Designer. The following are the ways to access the properties for a workstep from different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
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A Properties dialog appears that comprises the following tabs.

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- Entry Settings
- Requirements
- Attachments
- Workdesk
- Data Fields

Basic Details tab

For details, see Basic details section.

Entry Settings tab

For details, see Entry settings section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Workdesk tab

For details, see Workdesk section.

Data Fields tab

For details, see Data fields section.

Message end

This section discusses the various properties of the workstep available in NewgenONE Process Designer. The following are the ways to access the properties for a workstep from different views:

- In the abstract view, click the ellipsis icon in the workstep and select **Properties**.
- In the BPMN view, click the **Settings** icon in the workstep, and select **Properties**.

A Properties dialog appears that comprises the following tabs:

- Basic Details
- Entry Settings
- Requirements
- Attachments
- Workdesk
- Forward Variable Mapping
- Forward Document Mapping

- Data Fields

Basic Details tab

For details, see Basic details section.

Entry Settings tab

For details, see Entry settings section.

Requirements tab

For details, see Requirements section.

Attachments tab

For details, see Attachments section.

Workdesk tab

For details, see Workdesk section.

Forward Variable Mapping tab

For details, see Forward variable mapping section.

Forward Document Mapping tab

For details, see Forward document mapping section.

Data Fields tab

For details, see Data fields section.

Creating, adding, and editing calendar

To create a calendar, perform the following steps:

1. On the design area, select the workstep and open the Properties dialog.
2. On the Basic Details tab of the dialog, click the add button  next to the **Calendar** property. The New Calendar dialog appears.
3. Enter the following details in the corresponding fields of the dialog:

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

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

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

6. Click **Apply**.

To modify the calendar settings, click the edit button next to the **Calendar** property, and enter the details in the Calendar Settings dialog as specified in Step 5 above. Then, click **Apply** to save the changes.

Associating queue with workstep

There are two types of queues that you can associate with the workstep in the Basic Details tab. You either use a swimlane queue or create your own queue.

The process for both is the same.

To associate a queue with the workstep, perform the following steps:

1. Select **Use Swimlane Queue** or **Create Own Queue** on the Basic Details tab of the Properties dialog.
2. Then, click the corresponding edit button. A new dialog box appears.
3. On the General tab, specify the following information:
    a. Enter the name of the queue. In the case of the swimlane queue, the Name field is prefilled by default value.
    b. Provide additional information about the queue.
    c. Specify the type of queue — FIFO or WIP.
        - In case you chose **FIFO**, specify the fetching order. It can be in the order of Process Instance ID, entry date time, or priority level.
        - In case you chose **WIP**, specify the assignment order. It can be no assignment, dynamic assignment, or permanent assignment. To enable reassignment, select **Allow Reassignment** checkbox.
4. Navigate to the **Groups** tab, and add the required groups you want to associate with the queue. To select all the queues in the cabinet, select **Add All**.
   The added groups appear under the Selected Groups section.
5. Then, click **Associate**.

Operations on process

This chapter describes the various operations that you can perform in a process:

- Saving as new version
- Saving as template
- Validating process
- Pinning process
- Importing process
- Exporting process
- Generating process report
- Maker checker

Saving as new version

To save a process as a new version, perform the following steps:

1. On the Process Modeling page, click **More Options**.
2. Then, choose **Save as new version** from the list. The Save as new version dialog appears.
3. Select the version for the process and add a comment.
4. Click **Save**.

Saving as template

In NewgenONE Process Designer, you can either use prebuilt or user-defined templates for process designing. For using a user-defined template, you need to save a process as a template.

To save a process as a template, perform the following steps:

1. On the Process Modeling page, click **More Options**.
2. Then, choose **Save as template** from the list. The Save as template dialog appears.
3. Enter the following details in the dialog:

Field	Description
Category Name	Select the required category from the dropdown list.
Template Name	Enter the name of the template.
Template Description (Optional)	Provide additional details about the template if any.

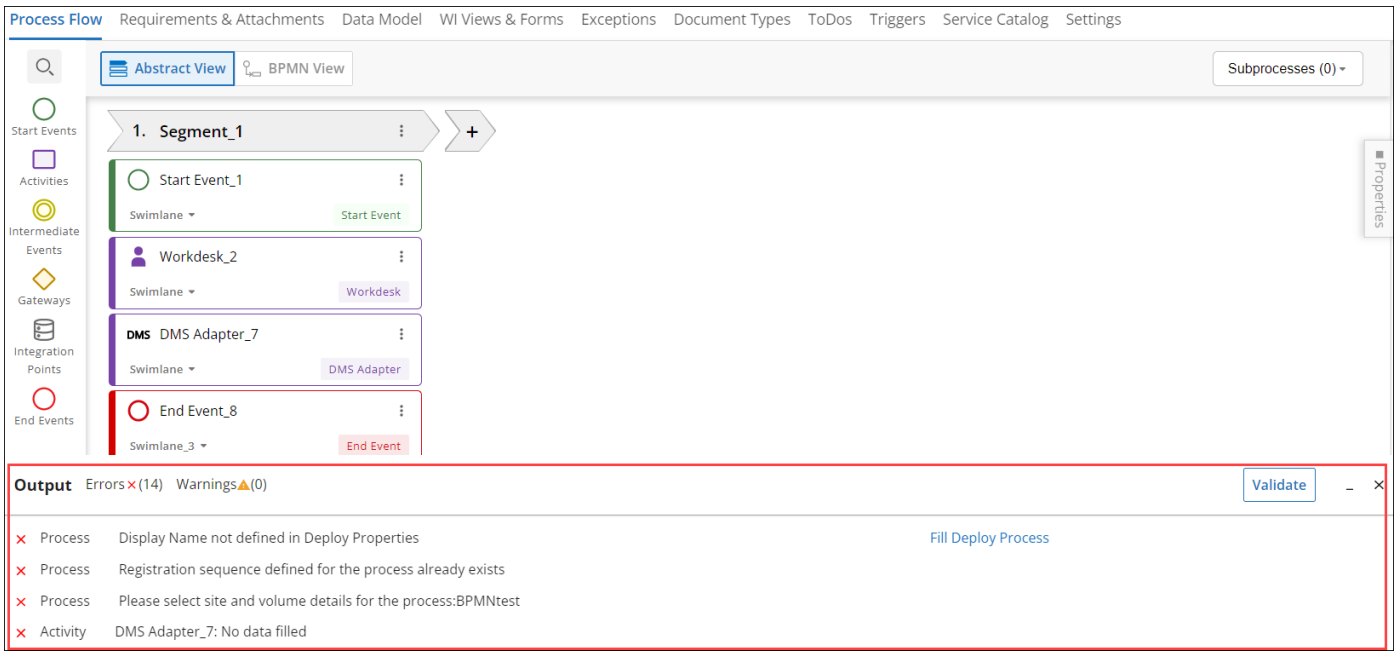
4. Click **Create Template**.

Validating process

Validate a process to mitigate process errors.

Errors can be caused due to requirements shortfall, deletion of a variable, trigger, workstep, or link. For example, if a rule consists of a variable, which is deleted later. Then, the corresponding rule becomes invalid.

To validate a process, click **More** and then select **Validate Process**. An output window appears at the bottom displaying the error and warning list for the process.



Pinning process

To pin a process, perform the following steps:

1. On the Process Modeling page, click **More Options**.
2. Then, choose **Pin Process** from the list. The process is now pinned, and you can view it on the Home page of the process designer. For more information, see Exploring home page.

Importing process

Importing helps to transfer processes between different applications. The different formats in which you can import a process are as follows:

- XML: It is a file format that allows you to import processes that are exported using the NewgenONE Process Designer. This XML file format does not include processes exported using external process designers.
- BPEL, XPDL 2.2, BPMN 2.0: These are standard file formats that the system supports importing processes created by external process designers and NewgenONE Process Designers.

You cannot import any process, created in iBPS Process Designer.

To import a process, perform the following steps:

1. Click **Import Process** on the top-right corner of the Processes page. The Import Process dialog appears.
2. Enter the following details in the corresponding fields of the dialog:

Field	Description
Import Type	The file type to be used for importing a process. The supported file types for importing are XML, XPDL 2.2, BPMN 2.0, and BPEL
Choose File	The process file to import.
Process Name	The name of the process.
Project Name	The name of the project where you want to store the process. It is typically the name of the selected project, and is not editable.

- When you import a process of type BPMN or XPDL, only the process's workflow gets imported. Properties are allowed to import from Newgen XML format.
- Query workstep is Newgen proprietary and not in the specifications of BPMN or XPDL. So, if a process with query workstep is imported in BPMN/XPDL, it is imported as Newgen's workdesk and behaves like a standard workdesk that needs incoming and outgoing connections.
- Currently, you can import only two BPEL processes. They are NgInsuranceClaim and NgPurchaseOrder.

3. Select the required option:

Option	Description
Import	Select this option to import the process to the chosen project.
Import and Open	Select this option to import the process to the chosen project and open the process afterward.
Cancel	Select this option to cancel the importing process and close the Import Process dialog.

When importing processes, you might face conflicts with existing data objects. In such cases, the conflicting data objects dialog appears with the following fields:

Feild	Description
Data Object	Displays all the conflicting data objects currently present in the target database cabinet that you are importing with the process.
Associated Processes	Lists the processes associated with the conflicting data object.
Resolve Conflict By	From the dropdown menu, select one of the following options: • Select **Existing** to keep the existing data objects from the current process. The imported data objects get ignored. • Select **Rename** to rename the imported data objects from the process and continue using them.

Feild	Description
Change Data Object Name	If you have selected "**Rename**" in the **Resolve Conflict By** field, you must enter a new name for the data object in this field. Ensure that this new name is unique and does not conflict with the names of existing data objects. • This field is mandatory and must be filled out. • This field is disabled if you select **Existing** in the **Resolve Conflict By** field.

A checkbox at the bottom of the import screen is selected by default, which includes the physical table of data objects during the import process. If the user prefers not to include the physical table, they can clear the checkbox.

4. Click **Validate & Save** to save the defined configurations. A dialog to confirm data object configuration appears.
5. Select the checkbox to confirm the changes in the data object configurations.
6. Select **Import Process** to import the process.

Exporting process

To export a process, perform the following steps:

1. On the Process Modeling page, click **More Options**.
2. Then, choose **Export Process** from the list. The Export Process dialog appears.
3. Specify the export type for the document. It can be XML, XPDL 2.2, BPMN 2.0, and BPEL.
4. Click **Export**.

Generating process report

The **Process report** feature provides you with detailed information about the various worksteps involved in a process in the form of a report. The format of the process report

is a Word document, which is dependent on Office 2016, Office 365, or the latest version of Office. When you generate a process report, you can either store it as a single process image or archive it in Omnidocs.

To generate a process report, perform the following steps:

1. On the Process Modeling page, click **More Options**.
2. Then, choose **Process Report** from the list. The Process Report dialog appears.
3. Depending on your requirements, select any one of the following options and click **Generate**.

    - Single Process Image: Appends the process image with the generated report in .zip format.
    - Archive in OmniDocs: The report is added to the OmniDocs. After generating the report, you can view it by navigating to the Archived Reports tab of the Process Report dialog.
      This tab shows the name and creation date of the report. It also lets you download the report using the download button next to it.

Maker checker

The Maker Checker option lets you manage and track the requests related to processes. Here, you can approve or reject requests added for process operations like enabling process, disabling process, or changing queue properties associated with the process.

These are the different sections available on the Maker Checker page:

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

To accept a request, perform the following operations:

1. On the Request Received section, click **Approve** next to the request you want to approve. The Approve dialog appears.

2. Enter a comment and click **Approve**. The accepted request no longer appears in the Request Received section.

To reject a request, perform the following steps:

1. On the Request Received section, click **Reject** next to the request you want to reject. The Reject dialog appears.
2. Enter a comment and click **Reject**. The rejected request now appears under the Rejected Requests section.

Deploying process

A process must be deployed to make it live. This option invokes the Deploy Process dialog for deploying the process in the connected remote database.

After deploying the process, it is mandatory to enable the process to create the workitems in it and start working on it. A deployed process can be in an enabled or disabled status. By default, a process is in a disabled status after it has been registered in the cabinet.

You can also make changes in the deployed processes by checking out the process. The check-out process option lets users make changes in the deployed process.

To deploy a process, perform the following steps:

1. On the Processes page, select the process. The Process Modeling page appears.
2. Click the **More** button and then choose **Deploy** from the list. The Deploy Process dialog appears.
3. Enter the following details in the corresponding fields:

Field	Description
Process Name	The name of the process.
Starting Sequence Number	A unique sequence number for the process.
Prefix/Suffix	Prefix or suffix for the default work item (WI) name that will be displayed to the business user in the run time workspace.
Registration length	The registration length of the process.

Field	Description
Display Name	A desired display name for the workitem. A workitem is created with this display name along with the sequence number.
Site	A site represents a storage management server (SMS). It serves as a repository for volumes, each consisting of multiple volume blocks. This field shows options based on the chosen cabinet.
Volume	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. This field shows options based on the chosen site.
Secure Folder	Select this checkbox to hide the process folder in Omnidocs to prevent unauthorized access to the workitem documents.
Create Webservice	Select this checkbox to create a web service when the process gets deployed.
Threshold Count	It denotes the number of times any process loop can run. Once the loop reaches a threshold count, the workitem moves to the subsequent workitem.
Comment	Additional information about the process, if any.

4. Click **Save & Deploy**.

Enabling process

By enabling a process, you can make deployed process enabled to start creating workitems in it.

To enable a process, perform the following steps:

1. On the Process Modeling page, click **More**.

2. Then, choose **Enable** from the list. The Enable Process dialog appears.
3. Enter a comment in the space provided.
4. Then, click **Enable** to confirm.

Disabling process

If you disable a process, you cannot create any workitem on the selected process.

To disable a process, perform the following steps:

1. On the Process Modeling page, click **More**.
2. Then, choose **Disable** from the list. The Disable Process dialog appears.
3. Enter a comment in the space provided.
4. Then, click **Disable** to confirm.

Checking out process

By checking out a process, you can make changes to the chosen process.

- You can check out a process only in the deployed status.
- You can check out only a checked-in process.

To check out a process, perform the following steps:

1. On the Process Modeling page, click **More**.
2. Then, choose **Check-out Process** from the list. The Checking-Out Process dialog appears.
3. Enter a comment in the space provided.
4. Then, click **Check Out** to confirm.

Users can also undo the check-out operation performed on a process.

You can undo check out a process only in the deployed status.

To undo check out a process, perform the following steps:

1. On the Process Modeling page, click **More**.

2. Then, choose **Undo Check-out Process** from the list. The Undo Checking-Out Process dialog appears.
3. Enter a comment in the space provided.
4. Then, click **Undo Check-out** to confirm.

Checking in process

After checking out a business process and making changes to it, you need to check in the same process to reflect the same changes in deployed process.

> You can check in a process only in the draft status.

To check in a process, perform the following steps:

1. On the Process Modeling page, click **More**.
2. Then, choose **Check-in Process** from the list. The Checking-In Process dialog appears.
3. Enter a comment in the space provided.
4. Then, click **Check-In** to confirm.

Managing projects and processes

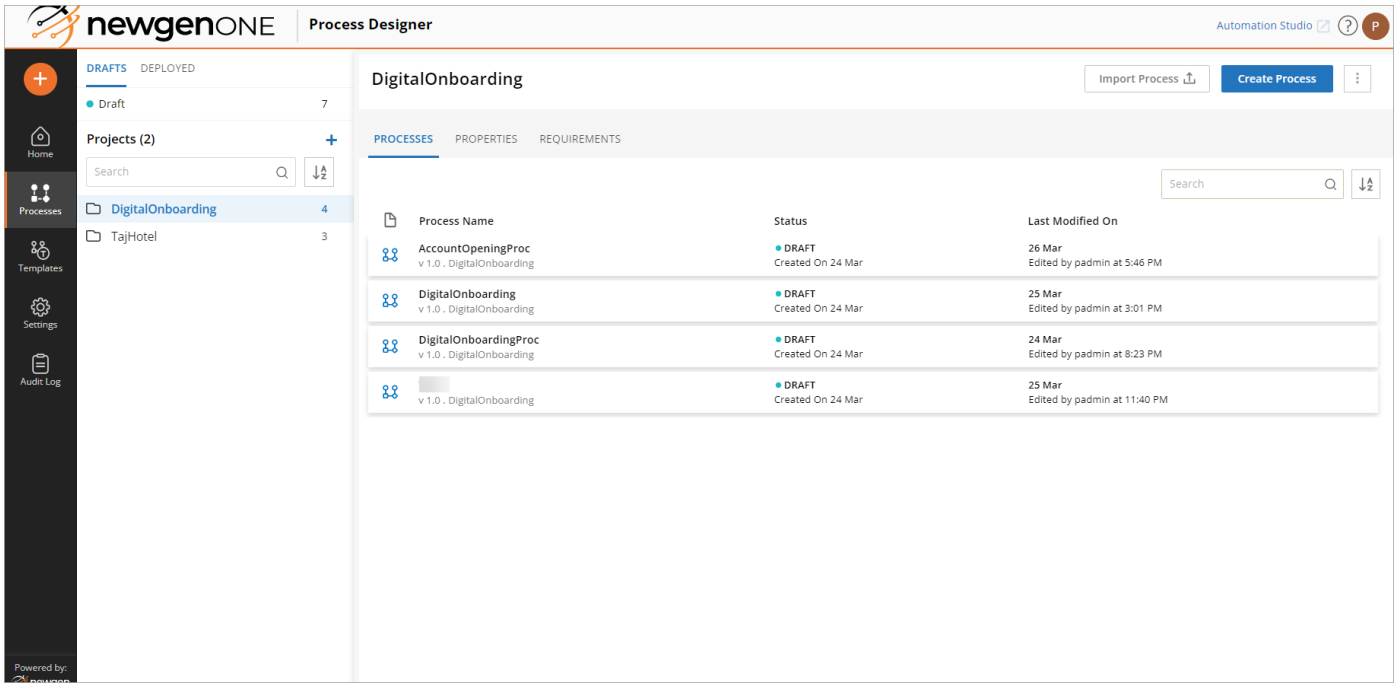
In this chapter, you will learn how to manage projects and processes using the NewgenONE Process Designer:

- Viewing projects and processes
- Renaming project
- Deleting project
- Deleting process

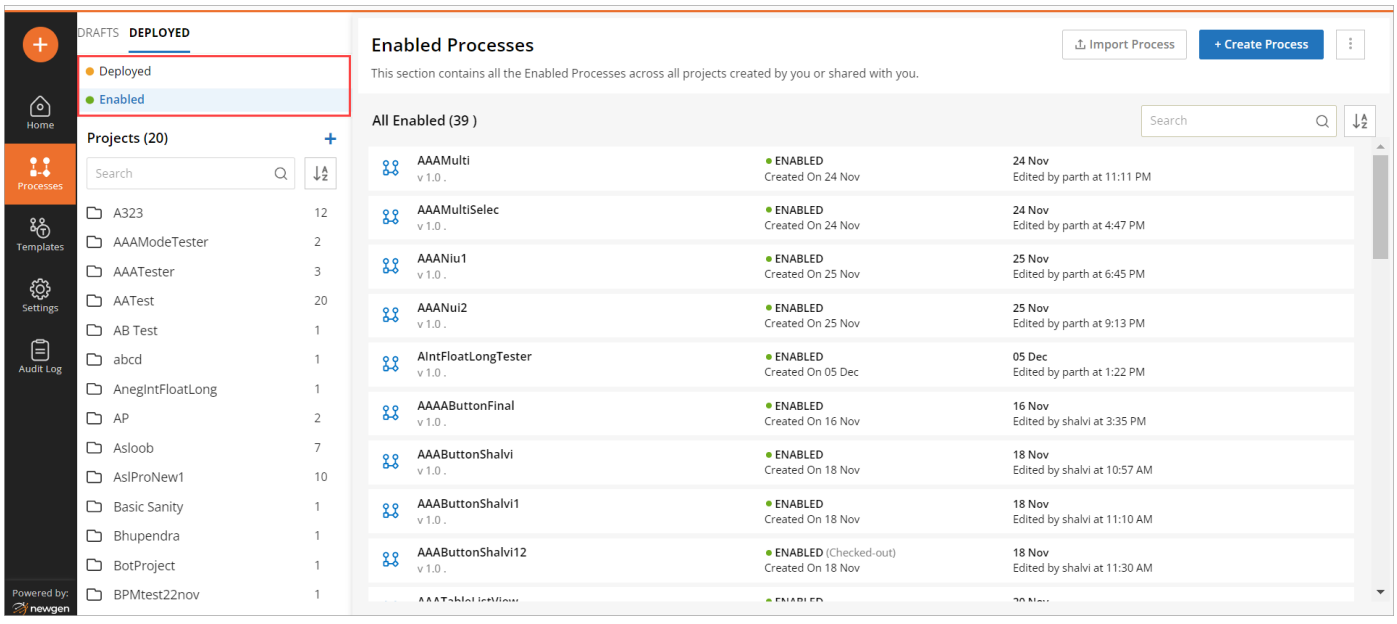
Viewing projects and processes

The Projects pane on the left of the Processes tab lists the processes across all the projects created or shared by you. There are two tabs in the Projects pane - Drafts and Deployed. The Drafts tab displays all the projects containing draft processes, while the

Deployed tab displays all the projects containing deployed processes. The section next to the Projects pane shows the processes of the chosen project, if available.



A process in the Deployed tab can either be in an enabled or deployed status. You can choose the process status through the **Deployed** or **Enabled** option at the top of the Deployed tab.



By clicking **Deployed**, the section next to the Projects pane shows all the deployed processes across the projects, while clicking **Enabled**, the section displays all the enabled processes across the projects.

Apart from this, you can search for a particular project or process in a list by typing its name in the search box. To arrange the projects or processes in chronological order, use the sort button  .

Renaming project

After saving a project, you can modify the project name by performing the following steps.

1. On the Processes tab, choose a project from the list shown under the Draft section.

   > In deployed mode, the project cannot be renamed.

2. Click the ellipsis icon on the top-right corner of the Process Designer window, and then choose **Rename** from the list.
3. In the Rename Project dialog that appears, enter the new name for the selected project, and click **Ok**.

Deleting project

Deleting helps to remove the projects that are no longer required in the Process Designer. When you delete a project, all the processes within that project along with their versions get removed from the cabinet.

> Once you delete a project, you cannot recover the deleted data.

To delete a project, perform the following steps:

1. On the Processes tab, choose a project from the list shown under the Drafts or Deployed section.
2. Click the ellipsis icon on the top-right corner of the Process Designer window, and then choose **Delete** from the list.

3. In the dialog that appears, click **Delete** to confirm.

Deleting process

To delete a process, perform the following steps:

1. Navigate to the Processes tab and choose a project from the list shown under the Drafts or Deployed section. A list of processes appears under the Processes tab of the selected project.
2. Select a process you want to delete. The Process Designer interface appears.
3. Click the **More** button and then choose **Delete** from the list.
4. In the dialog that appears, click **Delete** to confirm.

> Once you delete a process, you cannot recover the deleted data.

Working with templates

The **Templates** tab lets you arrange the process templates in different categories for easy navigation. To create a process template, you need to create and save a process as a template. For more information, please see Saving as template.

To add a category, perform the following steps:

1. Click the add icon + on the Categories pane of the Templates tab. The Add Category dialog appears.
2. Enter the **Category Name** and **Description**.
3. Click **Add & Close** to add the category and close the dialog. To add more categories, click **Add Another**.
   The added category appears in the Categories pane. Click the ellipsis icon ⋮ to edit or delete the category.
   In the Categories pane, you can also sort the categories in alphabetical order or find a specific category by typing its name in the search box.

Configuring global settings

This chapter describes the various global-level settings you can configure in NewgenONE Process Designer:

- Configuring service catalog settings
- Defining global requirement sections

Configuring service catalog settings

In this tab, you can configure the service catalog settings at the global level. It means these settings implies to all the projects and processes in the logged-in cabinet.

For procedural details, see Service catalog.

Defining global requirement sections

Business analysts can interact with an organization's business process managers and understand the business process. Business analysts define the requirements under requirement sections in natural language which will be utilized by technical users to define the process. This functionality has been provided to capture a better requirement-capturing mechanism while carrying out process modeling. This requirement-gathering activity is useful to generate detailed process documentation with links for embedded documents and annexures with form screenshots and integration details.

Requirement sections can be specified in a hierarchal model with first-level requirement section definition at the cabinet level here. The requirements defined at this level are shown at the project and process levels.

For information on how to add a requirement section, see Requirements section.

You can click the **Export Section** button to store the added requirement sections in an XML file, so that these requirements can then be easily moved to another cabinet, by importing the requirements file in another cabinet.

To import a requirement section, click the **Import Section** button. Then, drag-drop the required file or upload it from your system. The section gets imported.

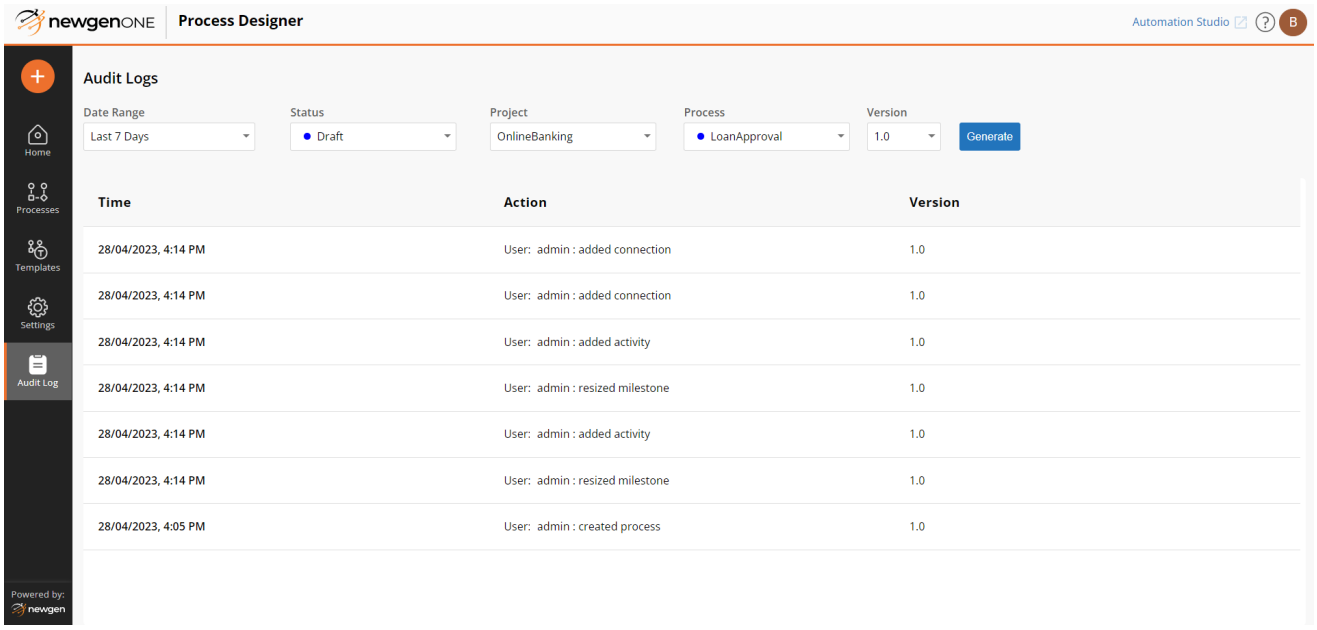
Generating audit log

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

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

To generate an audit log for a process, perform the following steps:

1. Navigate to the **Audit Log** tab.



2. Enter the following details in the corresponding fields:

Property	Description
Date Range	The time interval for which you want to generate the audit log. The available options are last 7 days, last 15 days, and last 30 days. To provide a customized time interval, select the **Custom Date Range** option.
Status	The status of the process. It can be draft or deployed.

Property	Description
Process	The name of the process for which you want to generate the audit logs.
Version	The version of the process.

3. Click **Generate** to view the audit log.

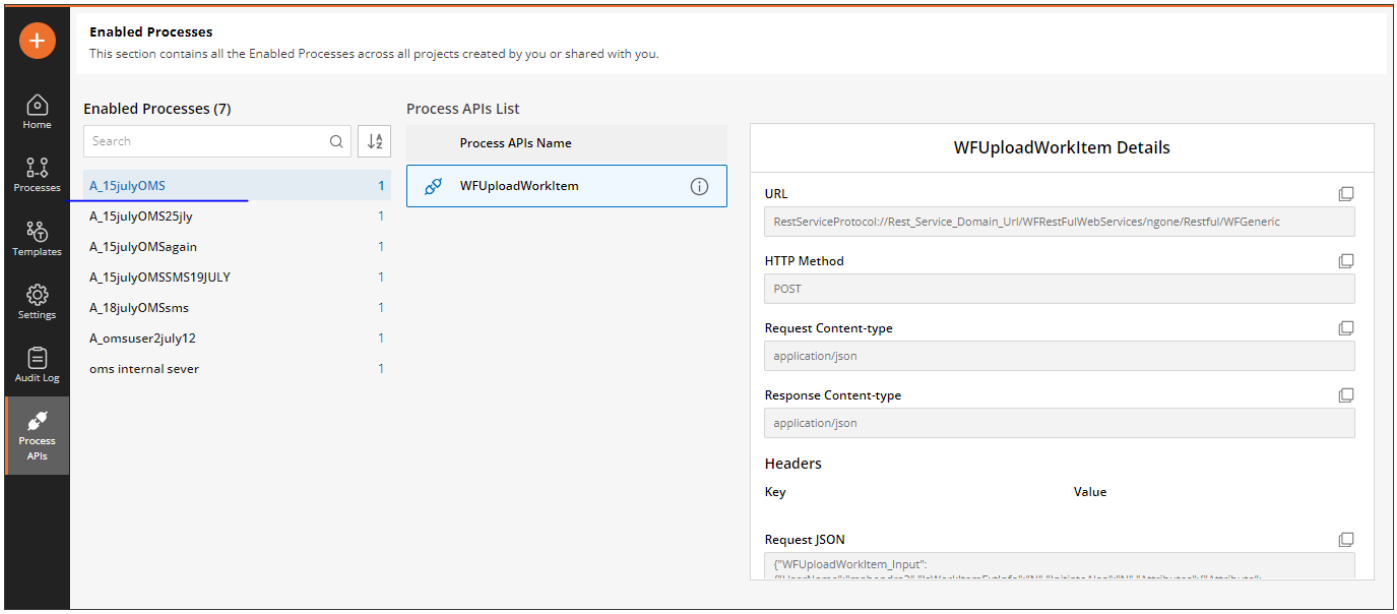
Managing Process APIs

The Process APIs tab navigates to the centralized platform for managing the process-related APIs within Process Designer. When the process is enabled, essential APIs get generated automatically. You can view the enabled processes in the left pane and a list of available APIs for the latest enabled version of the processes in the section next to it.

Currently, only the *WFuploadworkitem* API is available in the process APIs list. This API is used to create a workitem and upload the documents to its folder.

In the right pane, you can view the API details, such as URL, HTTP method, content type, request JSON, and more.

This tab enables you to use the required listed APIs and interact with the enabled process.



You can perform the following actions in the *Process APIs* tab:

- Manage process-related APIs.
- View API configuration and functionality.
- Copy API details using the copy icon against the specific field such as URL, HTTP method, request and response content type, request JSON, and more.