NewgenONE

Workspace

User Guide

Version: 2024.2

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Contents

Preface

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

Revision history

Revision date	Description
November 2024	Initial publication

About this guide

This user guide describes how to process workitems that include working on assigned workitems, creating a new workitem, searching a specific workitem, and other workitem related operations such as initiating, assigning, holding, referring, locking, and more.

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 user guide is intended for business users who work on workitems, cases, and tasks of a process. The reader must have a basic understanding of queues, processes, workitems, cases, tasks, and workdesk. The reader must also have sufficient rights to work with the various features of NewgenONE Workspace.

Related documents

The following documents are related to NewgenONE Workspace:

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

Documentation feedback

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

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

Introduction to Workspace

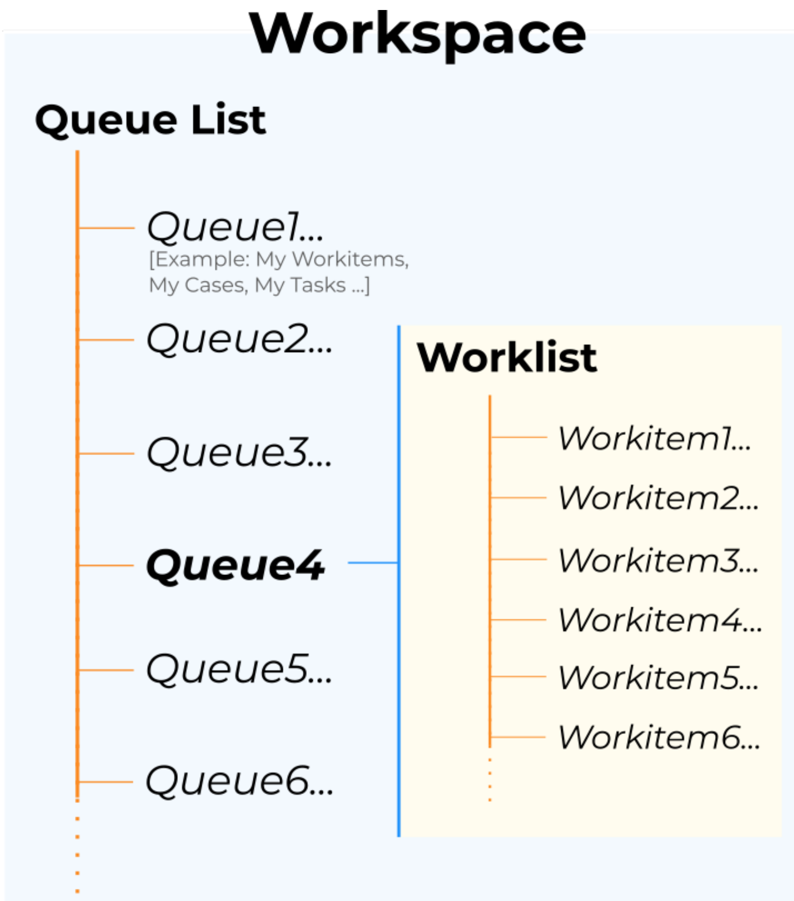
Enterprises need to automate their business operations to improve employee productivity and task completion accuracy, enable accountability, enhance collaboration, and deliver a better customer experience.

For example, let's consider Roy is an employee of XYZ Bank. He is responsible for verifying the KYC documents. As he signed in to the banking portal for back office processing, a list of tasks assigned to him appeared. He opens the requests one by one and verifies them based on the documents attached to the verification requests. Once Roy approves the request, it routes to the next step based on the defined process.

The NewgenONE Workspace empowers the business user to manage deliverables efficiently. It allows business users to view the assigned workitems in their queues, perform data entry operations and verification, manage approvals, and route files and data between different stakeholders of the system to accomplish a task.

The NewgenONE Workspace is a web-based application that lists your workitems awaiting action in various queues. To be able to view a queue, you must be a member of that queue. NewgenONE Workspace also provides extensive search functionality to search specific workitems. Furthermore, you can open any of the workitems on which you have access permissions in the Workdesk and can process them for further routing in the underlying process. All these features allow you to work effectively to improve employees' productivity and efficiency.

The following diagram depicts a logical hierarchy of queues, worklists, and workitems within a Workspace.



Workitem

Workitem is a basic unit or component in a business process workflow. It is a process instance on a workstep that flows in a business process from one workstep to another. In any workflow system, a user works on a particular workitem, performs data entry operations, and routes it through different stages of a process. Using NewgenONE Workspace you can navigate to a specific queue and perform the following operations on a workitem:

- Initiating
- Holding or unholding
- Locking or releasing
- Viewing workitems properties
- Assigning and reassigning
- Filtering specific workitems
- Revoking previously set references
- Setting reminders
- Setting priorities
- Completing
- Referring workitems to other users

Related topic(s):

- Searching a workitem
- Performing operations on My Workitems
- Performing operations on shared queue
- Performing operations on Workdesk

Workdesk

Workdesk is a standard processing desktop used for manually processing workitems in a queue. You can launch the Workdesk for any workitem by clicking it. Workdesk provides all the necessary functions for processing documents electronically such as check-listing, raising and clearing exceptions, annotating documents, viewing and entering data, taking decision-making actions on the documents, and more. It is further empowered with features like searching and linking workitems, referring workitems, and more.

Workdesk combines the capabilities of workflow and document management system (DMS). It also provides an easy mechanism of integration with other external applications. It is further empowered by various other features such as searches, document check-in or check-outs, versioning, and more.

Depending on the configuration defined for the workdesk while designing a process, the different workdesk options appear to the different user roles.

The following are the key features of a Workdesk:

Feature	Description
Standard interface for image-based processing	Workdesk provides an image-based processing of workitems. It is designed for operations that might be performed on a document.
Attaching documents	Workdesk allows you to attach documents of different file formats such as *.doc, .xls, .docs, .zip, .png, .jpeg,* and *.pdf* with workitems.
Adding conversation	Workdesk allows you to record any conversations on workitems. The conversation is recorded as a text document along with a workitem. You can add the conversation as a new document or append it to an existing conversation document.
Searching in DMS	Workdesk allows you to search for folders and documents uploaded in the DMS system.

Feature	Description
Versioning of documents	Workdesk allows you to manage different versions of a document. You can check-out a document to modify it and check-in the updated document as a major or minor version.
Annotation facility for documents	Workdesk allows you to annotate the document using the OpAll viewer tool. It facilitates you to make annotations such as adding notes, stamping date times, highlighting certain sections, and more in image documents.

Related topic(s):

Performing operations on Workdesk

Getting started

This chapter describes how to get started with NewgenONE Workspace.

It contains the following sub-sections:

- Accessing Workspace
- Exploring workspace interface

Accessing Workspace

This section describes how to access the Workspace module using NewgenONE.

To access the Workspace, perform the following steps:

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

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

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

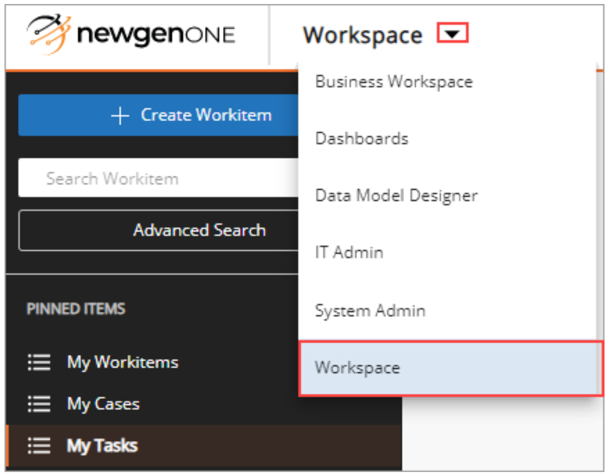
The NewgenONE sign-in page appears.

3. Enter the following details:

Field	Description
Username	Enter your user name.
Password	Enter the password.
Cabinet	Select a cabinet from the dropdown list.
Remember me	Select the checkbox to avoid re-typing the credentials in the next sign-in.

4. Click **Login** to start the session.
   On successful sign-in, the NewgenONE landing page appears.

5. On the upper-left corner, click the dropdown icon ▾ and select **Workspace**.



The Workspace page appears.

Related topic(s):

- Creating workitems
- Searching a workitem
- Performing operations on My Workitems
- Performing operations on shared queue
- Performing operations on My cases
- Performing operations on My tasks
- Performing operations on Workdesk

Resetting password

To reset your forgotten password, perform the following steps:

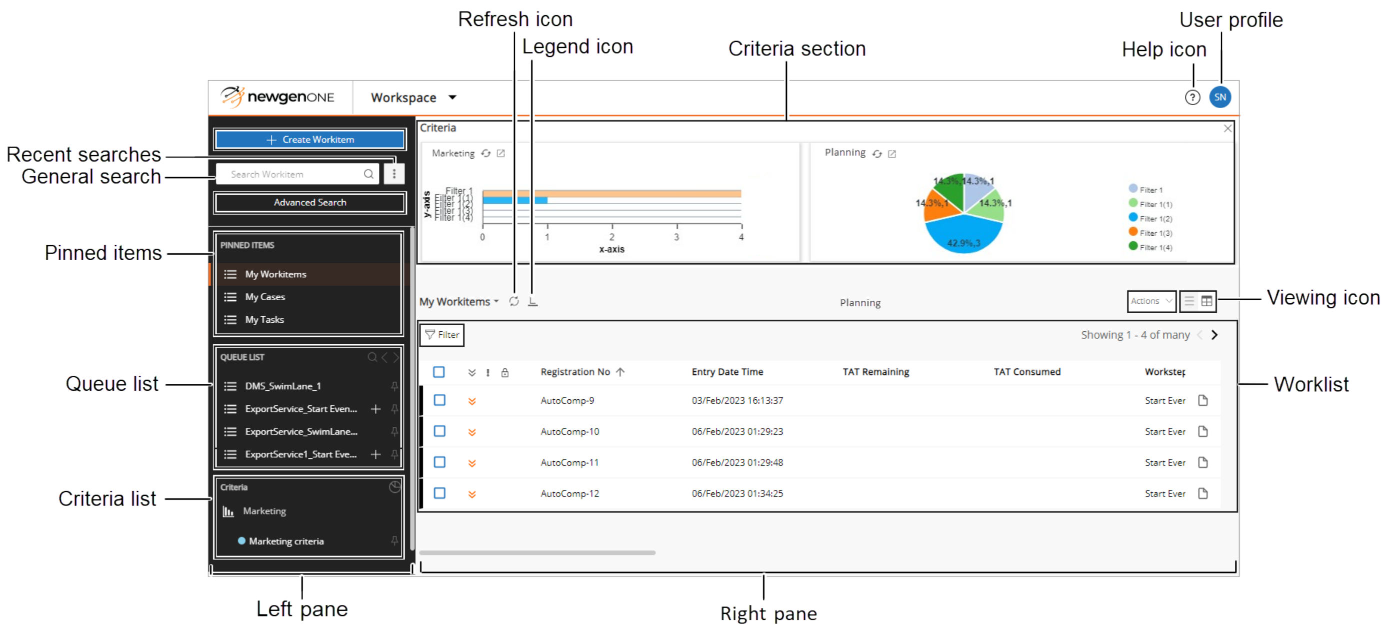
1. On the sign-in page of NewgenONE, click **Forgot Password?**. The Forgot Password dialog appears.
2. Enter the following details:

Field	Description
Username	Enter your user name.
Email	Enter your registered email address.

3. Click **Get Reset Link**. A reset link and a set of instructions for resetting the password are shared on your registered email address.
4. Open the reset link. The Reset Password page appears.
5. Enter the new password and re-enter to confirm.
6. Click **Reset Password**. The password gets updated.

Exploring Workspace interface

This section describes the options on the Workspace interface.



The Workspace interface consists of the following options:

Options	Description
Create workitem	Allows you to create and initiate a workitem in a process by selecting the corresponding initiation queue. For procedural details, see the Creating a workitems section.
General search	Allows you to search a workitem based on the data associated with it. For procedural details, see the General search section.
Recent searches	Displays the list of recent and saved searches by clicking the recent search icon . It also displays the saved search criteria marked as pinned.

Options	Description
Advanced search	Allows you to precisely search a specific workitem on the bases of process, queue, and global queue. Here, you can also pin the searched result. For procedural details, see the Advanced search section.
Pinned items	Allows you to access the list of workitems, cases, and tasks that are assigned to you. • My Workitems — Consists of the list of workitems assigned to you. • My Cases — Consists of the list of cases assigned to you. • My Tasks — Consists of the list of tasks assigned to you. Pinned Items section also lists the queues that are pinned in the Queue List.
Queue list	Displays the list of shared queues on which you have access rights. You can work on any queues and mark them as pinned by clicking the pin icon against the respective queues. As you pin a queue, it also appears in the Pinned Items list. To unpin a pinned item, click the pinned icon . The blue pin icon depicts a pinned item. In case of multiple shared queues, to search a specific queue, you can use the search icon or batching icon < >. For more details, see the Performing operations on shared queue section.
Worklist	Displays the list of workitems in a queue. If there are multiple workitems available in a queue, then you can click the batching icon < > to traverse through the previous or next batches of the worklist.
Filter	Allows you to filter the workitems in a selected queue. For procedural details, see the Filtering workitems section.
Refresh icon	Allows you to refresh the worklist by clicking the icon.
Legend icon	The workitem entries in the worklist possibly appear in different color labels. Each color provides specific information about the state of each workitem. Clicking the icon provides the information of each color.

Options	Description
Actions	Allows you to access the following operations: • **Show Count** — Selecting this action provides the number of workitems in a worklist. • **Reminder List** — Selecting this action displays the list of reminder notifications that are set for you. • **User Preferences** — Selecting this action allows you to set the column names for the worklist to display in the Workspace. It also allows you to rearrange the order of operation appearing on selecting a workitem and set the other preferences in the corresponding tabs. • **Download** — Selecting this action allows you to download the worklist in PDF, CSV, TXT, or XLSX format. For procedural details, see the Other operations on workitem section.
Viewing icon	Allows you to change the worklist view. To view the worklist in list view, click the list view icon or click the compact view icon to view the composed worklist.
Help icon	Allows you to access the Workspace module's online help. It provides all the necessary information you required to get started with the Workspace module.
User profile	Displays: • **User name** — Displays your user name. • **Cabinet** — Displays the cabinet name used for signing in to NewgenONE. Allow you to perform the following operations: • **Default Workspace** — Selecting this option sets the currently open module as your default module. • **My Settings** — Allows you to set the batch size of workitems in a worklist. To set the batch size: 1. Click **My Settings**. 2. Enter a desired number in the **Batch Size** box that must display in the worklist batch. 3. Click **Save**. The batch gets applied. • **Logout** — Signs you out of the NewgenONE platform.

Options	Description
Criteria section	Based on the criteria defined for workitems in the Business Workspace module, the Workspace module provides an encapsulated view of the filtered workitems. The filtered workitems appear as interactive and easy-to-understand charts like bar charts, donut charts, pie charts, or tiles, based on your selection. You can directly access the required workitems based on the filtered categories displayed in the Criteria section. You can close the Criteria section view by clicking the cross icon × displayed in the Criteria section. In case of multiple criteria, you can navigate to the required criteria using the carousel icon (or). The Criteria section only appears on Workspace if it is defined in the Business Workspace module. To define a criterion, refer to the *Business Workspace Administration Guide*. Also, for created criteria-related settings, refer to the *System Admin Administration Guide*.
Criteria list	Displays a list of defined criteria. Selecting a criterion displays a list of filtered workitems and their details. These details appear based on your preferred settings. Here, you can click the icon to view the Criteria section. It is also possible to pin the required criteria by clicking the pin icon. The pinned criteria appear in Pinned Items. You can unpin the criteria by clicking the pinned icon.

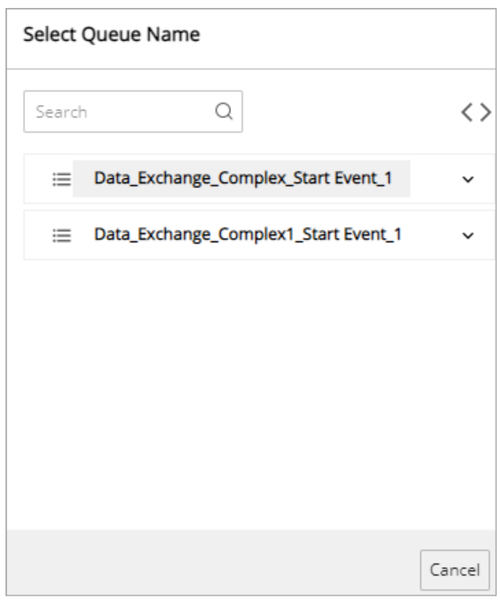
Furthermore, you can navigate through the elements of the workspace user interface using the Tab key.

Creating a workitem

You can create workitems for an initiation queue if you have rights to the respective initiation queue.

To create a workitem, perform the following steps:

1. On the Workspace interface, click **+ Create Workitem**. The Select Queue Name dialog appears. It displays a list of the available initiation queues on which you have access permission.



2. Select the required initiation queue. A list of processes appears. This list includes the names of all the processes on which the selected initiation queue is defined.

> In case the queue list is long, you can navigate to the required initiation queue using the Search box or batching icon .

3. Click the required process. The workitem gets created and appears in the workdesk.

Related topic(s):

- Creating a new workitem
- Initiating a workitem

Searching a workitem

Workspace is empowered with extensive search capabilities that allow you to search for workitems based on information like process name, worksteps, queues, creation date times, introduction date times, and others.

You can perform the search operation using the following ways:

- General search
- Advanced search

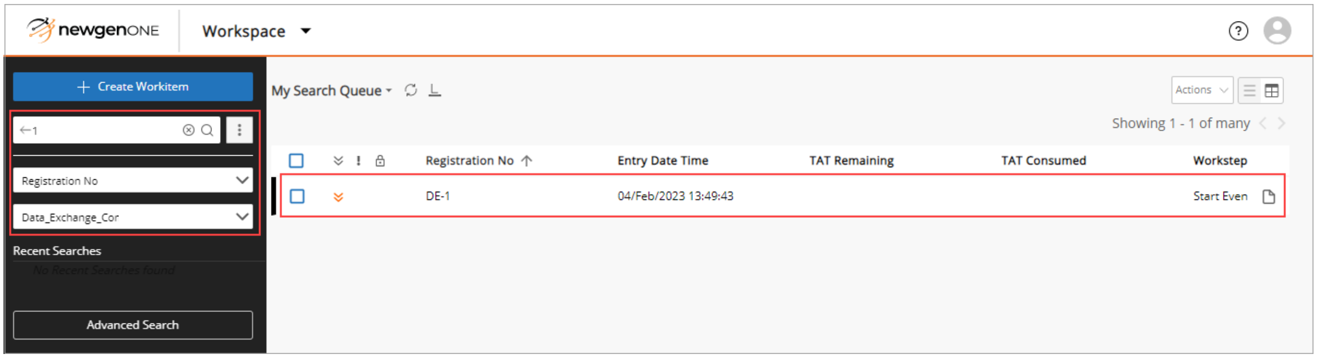
General search

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

1. On the Workspace interface, click the **Search Workitem** box. The following fields appear to select:

Field	Description
Registration No or ProcessInstanceId	• Selecting Registration No searches the workitem based on the registration number. • Selecting ProcessInstanceId searches the workitem based on process instance ID.
Select Process	Allows you to select the process name in which the required workitem exists.

2. Enter the sequence number of the workitem in the search box and click the search icon . The search result appears in the right pane.



Here, you can perform the required operation on the searched workitem. For more information on workitem operations, see the Working on workitems section.

Related topic(s):

- Performing operations on My Workitems
- Performing operations on shared queues

Advanced search

To perform an advanced search, specify values for predefined variables like general, business-specific, system variables, and others. Use the Asterisk (*) for text-based searches. Additionally, save search queries for future use to easily repeat the same search later.

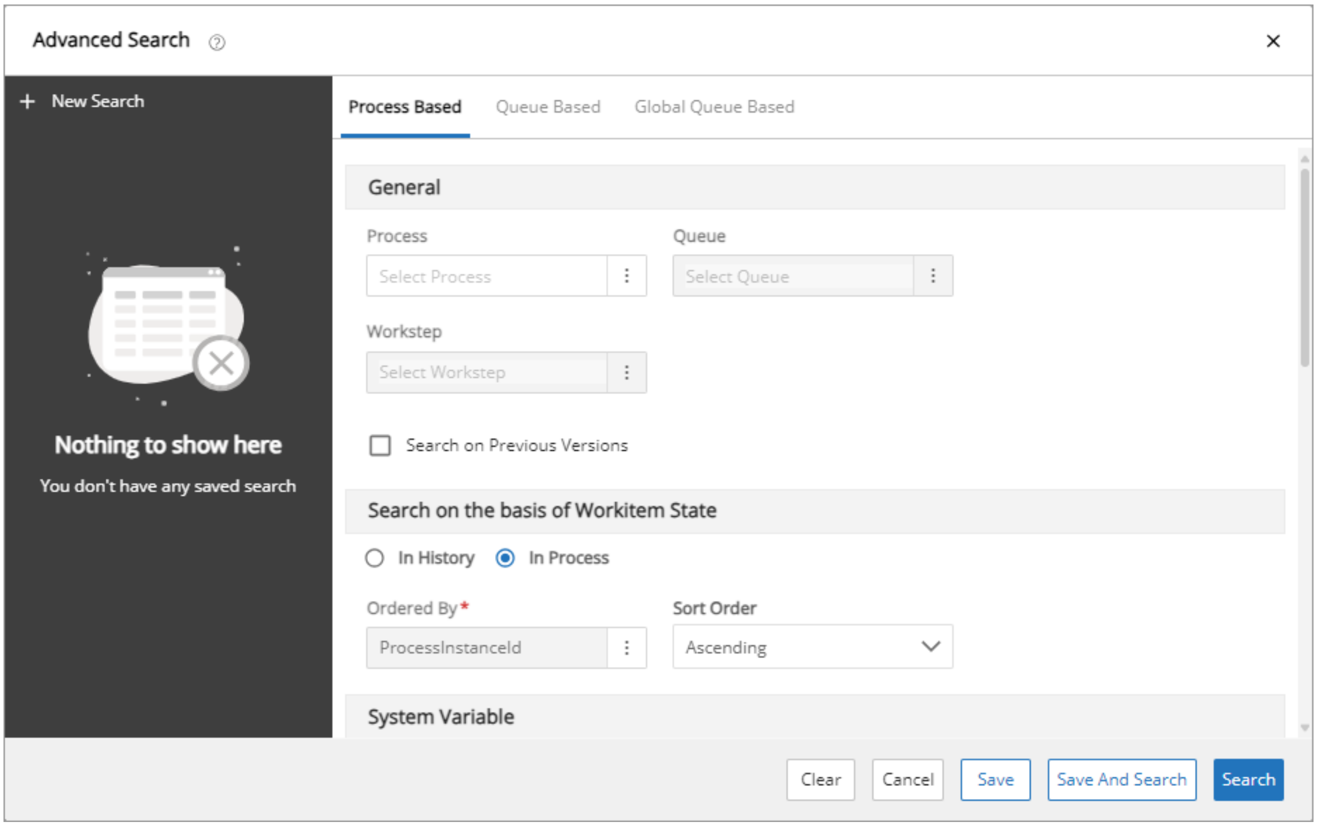
Advanced search provides the following types of search:

- **Process Based search** — You can search within processes where you have rights, either in the Initiation Queue or the Query Workstep Queue. The relevant process query workstep search variables are accessible as business search variables. Additionally, the corresponding search result variables are displayed as columns in the output work item list alongside system variables, providing valuable information.
- **Queue Based search** — You can search within queues where you have rights. The corresponding queue search aliases are available as business search variables. These aliases are also displayed as columns in the output work item list, alongside system variables.
- **Global Queue Based search** — You can search within global queues, that allows searching across all processes where you have rights. The corresponding

searchable aliases for these queues are available as business search variables. These aliases are also displayed as columns in the output work item list, alongside system variables.

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

1. On the Workspace interface, click **Advanced Search**. The Advanced Search dialog appears.



The Advanced Search dialog is divided into the following sections:

Section	Description
Left pane	Displays the list of saved search queries for future reference. It also allows you to pin and delete the saved queries. To perform a new search, click **+ New Search**.

Section	Description
Right pane	Provides you with options to set your search query. It is further divided into the following tabs: • Process Based — For searching workitem based on process. • Queue Based — For searching workitem based on queue. • Global Queue Based — For searching workitem based on global queue.
Operation panel	See step 3.

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

Field	Description
General	
Process	Searches the workitem in the selected process. Click the ⋮ icon to select the required process.
Queue	Searches the workitem in the selected queue. Click the ⋮ icon to select the required queue.
Workstep	Searches the workitem in the selected workstep. Click the ⋮ icon to select the required workstep.
Search on Previous Versions	Includes workitems of the previous versions.
Search on the basis of Workitem State	
In History	Searches for workitems that exit and move out of the system by a scheduled job.
In Process	Searches the workitem pending in the process, moved to exit, or discarded recently.
Ordered By	Order the searched workitem based on the variable. Click the ⋮ icon to select the required order.
Sort Order	Sorts the workitem in ascending or descending order. Click the dropdown option to select the required sorting order.
System Variables	

Field	Description
Registration No.	Searches the workitem using the registration number. Enter the required registration number.
Introduced By	Searches the workitem using the initiator's user name. Click the ⋮ icon and select the required user name.
Locked By	Searches the workitem using the locked by user name. Click the ⋮ icon and select the required user name.
Assigned To	Searches the workitem using the currently assigned user name. Click the ⋮ icon and select the required name.
Business Variable	
Define Condition	Business variables contain the basic, extended, and system variables of a process. The availability of fields depends on the business variable defined for the selected process. Specify the business variables fields that are related to the required workitem. Or, click the **Define Condition** checkbox to add custom variables. Only the variables defined by the administrator are available in business variable.
Date Variables	
Introduced on	Searches for the workitems, introduced between a specified date range.
Created on	Searches for the workitems, created between a specified date range.
Exited on	Searches for the workitems, exited between a specified date range.
Others	
Priority	Searches the workitem based on the selected priority. Click the Priority dropdown list and select the required priority. Following is the list of priorities: • Low • Medium • High • Very High

Field	Description
Exception	Searches the workitem based on the exception availability. Select one of the following options: Yes — To search for workitem with exceptions. No — To search for workitem without exceptions.
Lock Status	Searches the workitem based on the lock status. Select one of the following options: • Yes — To search for workitem with a locked status. • No — To search for workitem without a locked status.
Hold Workitem	Searches for hold workitems.
Suspended Workitems	Searches for suspended workitems.
Exclude exit workitems	Excludes workitems that have exited from the worklist.

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

Field	Description
General	
Queue	Searches the workitem in the selected queue. Click the ⋮ icon to select the required queue.
System Variables	
Introduced By	Searches the workitem using the initiator's user name. Click the ⋮ icon and select the required user name.
Business Variable	
Define Condition	Business variables contain the basic, extended, and system variables of a process. The availability of fields depends on the business variable defined for the selected process. Specify the business variables fields that are related to the required workitem. Or, click the **Define Condition** checkbox to add custom variables. Only the variables defined by the administrator are available in business variable.

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

Field	Description
General	
Global Queue	Searches the workitem in the selected global queue. Click the dropdown to select the required global queue.
Business Variable	
Define Condition	Business variables contain the basic, extended, and system variables of a process. The availability of fields depends on the business variable defined for the selected process. Specify the business variables fields that are related to the required workitem. Or, click the **Define Condition** checkbox to add custom variables. Only the variables defined by the administrator are available in business variable.

3. Go to the Operation panel and select any one of the following buttons based on your requirement:

Button	Description
Clear	Removes the entered search criteria.
Cancel	Closes the Advanced Search dialog.
Save	Saves the search criteria. For more details, click here.
Save And Search	Saves the search query and searches the workitem based on the entered criteria.
Search	Searches the workitem based on the entered criteria.

To save the search criteria as a query, perform the following steps:

1. In the Advanced Search dialog, define the search criteria as explained in the above steps.
2. Click **Save**. The Save Query dialog appears.
3. Specify the following details:

Field	Description
Query name	Enter a name to save the search criteria.

Field	Description
Save As	Select one of the following option: • Local — Selecting this option saves the search criteria only for you. • Global — Selecting this option saves the search criteria for all users of the Workspace module.

4. Click **Save** to finalize.
   The saved search is displayed in the left pane of the Advanced Search dialog. You can pin or delete the required saved search by clicking the respective pin icon or delete icon. You can directly access the pinned and saved searches from the Recent Searches list.

Related topic(s):

- Performing operations on My Workitems
- Performing operations on shared queues
- Performing operations on My Cases
- Performing operations on My Tasks

Generating Q/A with NewgenONE Marvin

NewgenONE Marvin is a Generative Artificial Intelligence (GenAI) tool used for generating questions and answers based on a workitem and its associated documents. To facilitate a quick start, Marvin's Q/A functionality provides preset questions and allows users to ask questions related to the workitem and its documents.

> To use NewgenONE Marvin functionality in the *NewgenONE Workspace*, you must register and configure its engine settings in *NewgenONE OmniDocs Admin*.
> For more information, refer to the *NewgenONE OmniDocs Administration Guide*.

Consider a scenario where the loan processing team at ABC Bank faces a sudden surge in loan applications, leading to delays. The team might struggle to process all applications efficiently. To expedite the process, they can leverage the NewgenONE Marvin feature to swiftly retrieve the required customer information from documents, use it to populate the work item, or quickly access essential work item details through Marvin.

The other benefits of using NewgenONE Marvin include:

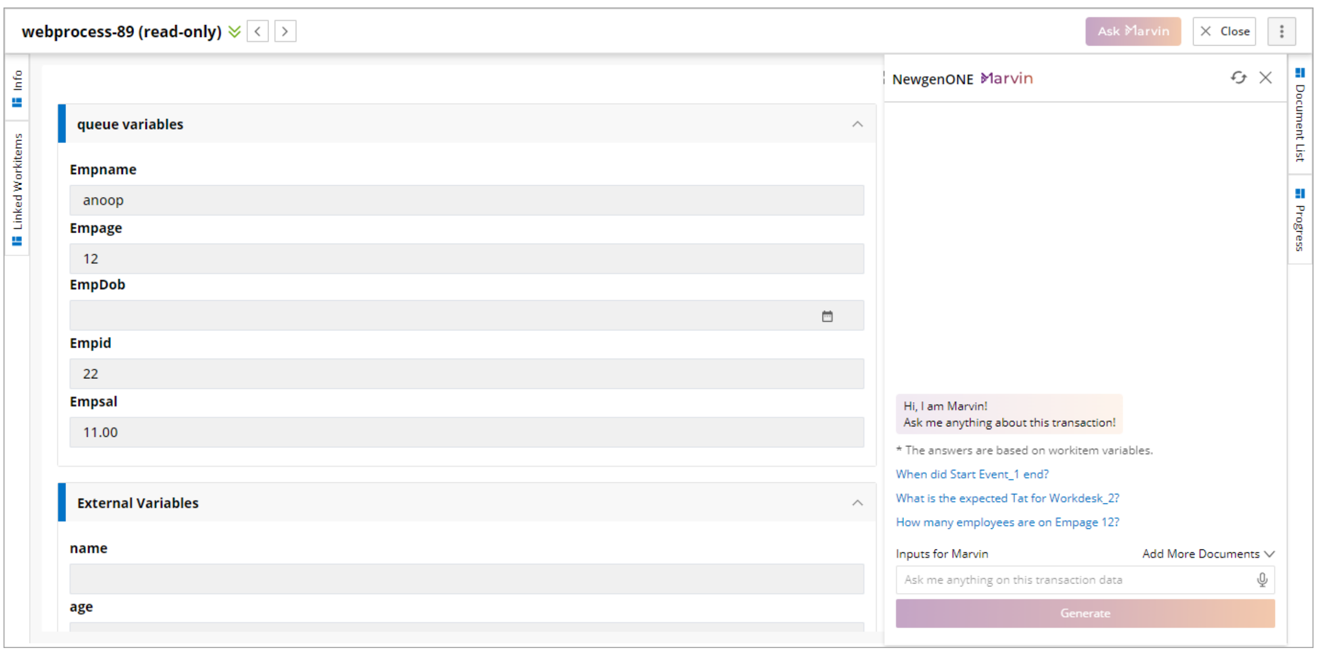
- Assistance in decision-making — Generating questions and answers provide valuable insights and details about the content of documents, helping organizations make informed business decisions.
- Reduced Turnaround Time (TAT) — NewgenONE Marvin quickly retrieves and processes information from documents, significantly speeding up workflows and reducing the time required to complete tasks.
- Error reduction — By automating data extraction and analysis, NewgenONE Marvin minimizes the risk of human error, ensuring greater accuracy in document handling and decision-making.

The NewgenONE Marvin feature in NewgenONE Workspace allows you to fetch the data related to the workitem and its attached documents.

To fetch the data using NewgenONE Marvin, perform the following steps:

1. Open a workitem. Once the workitem gets opened, an Ask Marvin button appears at the top of the workitem.
2. Click **Ask Marvin**. A NewgenONE Marvin pane appears on the right. It takes a few seconds to analyze the data within the workitem and documents and then generate the relevant questions based on this data. Additionally, a text prompt appears at the bottom of the pane. You can use the text prompt to ask questions or click the microphone icon to speak your search query instead of typing it.

   - The OmniDocs Text Extraction Manager must be installed to extract text from documents.
   - You can click the required question to view its corresponding answer. NewgenONE Marvin takes a few seconds to analyze the data and then generates the answer.
   - The speech-to-text functionality is only supported in the English language.



3. Enter your question in the text prompt or click the microphone icon to speak your search query.
4. Click **Generate.** NewgenONE Marvin takes a few seconds to analyze the data and then generates the answer.
5. (Optional) To quickly copy the answer to your device's clipboard, click the **Copy to clipboard** icon that appears along the generated content.
6. Click **Add More Documents** to view the list of documents attached to that particular workitem that NewgenONE Marvin can use while generating the answer. You can select the required document to generate the answers using NewgenONE Marvin.

7. Click the **Clear Chat** icon to clear the conversation with the NewgenONE Marvin.

Performing operations on My Workitems

The My Workitems panel displays a worklist of the workitems that are assigned to you. You can perform the following operations on the workitem available in My Workitems:

- Done
- Refer
- Revoke
- Reassign
- Properties
- Release
- Priority
- Set Reminder
- Hold
- Unhold

Filtering workitems

You can select a specific queue to view all workitems present in that queue. These workitems can come from multiple worksteps or processes. You can set the filter on the worklist to view the workitems belonging to a specific process. You can save the selected filter criteria for future use.

To set a filter on a worklist, perform the following steps:

1. On the Workspace page, from the left pane, select **My Workitems**. Your worklist appears in the right pane.
2. Click **Filter**. The Set Filter dialog appears.

3. Specify the following criteria:

Section	Field	Description
General	Queue	Filters the workitems from the selected queue. This field is specified as My Workitems by default and it is non-editable.
	Process	Filters the workitems in the selected process. Click the ⋮ icon to select the required process.
	Workstep	Filters the workitems in the selected workstep. Click the ⋮ icon to select the required workstep.
Business Variable	Business variables contain the basic, extended, and system variables of a process. The availability of fields depends on the business variable defined for the selected process. Specify the business variables fields that are related to the required workitems.	
System Variables	Registration No. or ProcessInstanceId	Filters the workitems using the registration number or process instance ID. Click the **Registration No.** dropdown list and select a **Registration No.** or **ProcessInstanceId** option. Based on the selected option, a text box appears. Specify the required details in the text box.
	Introduced By	Filters the workitems using the initiator's user name. Click the ⋮ icon and select the required user name.
	Locked By	Filters the workitems using the locked by user name. Click the ⋮ icon and select the required user name.

Section	Field	Description
Others	Priority	Filters the workitems based on the selected priority. Click the dropdown list under **Priority** and select the required priority. Following is the list of priorities: • **Low** • **Medium** • **High** • **Very High**
	Exception	Filters the workitems based on the exception availability. Select one of the following options: • **Yes** — To filter for workitems with exceptions. • **No** — To filter for workitems without exceptions.
	Checklist Complete	Filters the workitems based on the checklist completion status. Select one of the following options: • **Yes** — To filter for workitems with checklist completion status. • **No** — To filter for workitems without checklist completion status.
	Lock Status	Filters the workitems based on the lock status. Select one of the following options: • **Yes** — To filter for workitems with a locked status. • **No** — To filter for workitems without a locked status.

Section	Field	Description
Date	Introduced on	Filters the workitems based on the initiation date. Select a suitable operator from the **Introduced on** dropdown list and specify a date range for workitems initiation.
	Entry Date Time	Filters the workitems based on the entry date time. Select a suitable operator from the **Entry Date Time** dropdown list and specify a date range for workitems entry.
	Valid Till	Filters the workitem based on validity. Select a suitable operator from the **Valid Till** dropdown list and specify a date range for workitems validity.
Exclude exit workitems		Excludes workitems that have exited from your worklist.
Search on Previous Version(s)		Includes workitems of the previous version(s).

You can specify the filter criteria based on your requirements. If you do not want to filter a specific criterion, simply leave the fields empty.

4. Click any of the following buttons:
   - **Save** — Selecting this option opens the Save Query dialog. It saves the entered filter criteria as a query. The saved query appears in the left pane of the Set Filter dialog.
   - **Save and apply** — Selecting this option opens the Save Query dialog. It saves the selected filter criteria as a query and displays the filtered result.
   - **Apply** — Selecting this option displays the filtered result.
   - **Clear** — Selecting this option clears the entered criteria.
   - **Cancel** — Selecting this option closes the Set Filter dialog.

Workitems that meet the filter criteria appear in the worklist of the selected queue.

Related topic(s):

- Performing operations on My Workitems
- Performing operations on shared queues
- Performing operations on My Cases
- Performing operations on My Tasks

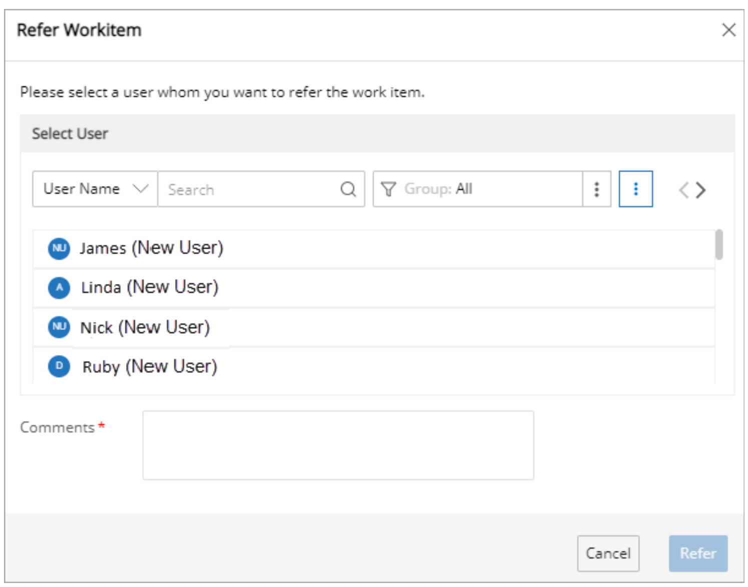
Referring workitems

You can refer workitems to other users of a Workspace. The referred workitems appear in the My Workitems space of the referred user. After the referred user finalizes the workitem, it again appears in the original user's worklist.

Workspace also facilitates chained referrals. In such a scenario, a referred user can further refer the workitem to another user, and so on.

To refer workitems, perform the following steps:

1. On the Workspace page, from the left pane, click **My Workitems**. The worklist appears in the right pane.
2. Select the checkboxes against the required workitems. The related operations appear in the upper-right corner.
3. Click **Refer**. The Refer Workitem dialog appears.



4. In the Select User section, select a user to refer the workitems. You can select a user in any of the following ways:
   - Navigate to the required user by scrolling through the list. If the required user is unavailable in the open list, click the batching icon to move to the next or previous batches of the users' list.

   OR

- Using User Name or Personal Name:
    a. From the User Name dropdown list, select **User Name** to search for a user by user name. Otherwise, select **Personal Name** to search for a user by first name. The users' list appears based on the selected option.
    b. In the **Search** box, enter a user name or user's first name.
    c. Press **Enter** or click the search icon . The searched user appears.
    d. Select the required user.

OR

- Using the Group name:
    a. Click the **Group Filter** icon to filter the users' list by a group name. The Group Filter dialog appears displaying the list of available groups under the Select Group(s) section.
    b. In the Select Group(s) section, click a group name to which the required user belongs. The select group appears under the Selected Group(s) section. You can also select multiple group names.
    c. Click **Apply**. The users' list belonging to the select group appears under the Select User section.
    d. Select the required user.

OR

- Using user's Expertise Filter:
    a. Click the **Expertise Filter** icon . The list of available expertise appears.
    b. Search and select the required expertise. The users' list appears based on the selected expertise.
    c. Click **Select Rating**. The Rating list appears. The users are rated from one star to five stars based on their expertise level in a particular sector.
    d. Select the required rating to which the user belongs. The list of users belonging to the select rating appears.
    e. Select the required user.

5. In the **Comments** box, enter a brief description and click **Refer**. The workitem gets referred.
   The referred workitem appears in the selected user's My Workitems. You can also see the referred workitem in your My Workitems in read-only mode from where you can revoke it, if required.

Related topic(s):

Revoking referred workitems

Revoking referred workitems

Once you refer the workitems, they appear in your My Workitems list. You can perform revoke, properties, set reminders, and hold operations on a referred workitem. In case, you want to revoke the referred workitems, you can select them from the My Workitems list or the queue to which the referred workitems belonged and revoke them.

Only the user who referred the workitems has the authority to revoke them.

To revoke workitems, perform the following steps:

1. On the Workspace page, from the left pane, click **My Workitems**. The worklist appears in the right pane.
2. Select the checkboxes against the workitems that you have referred. The related operations appear in the upper-right corner.
3. Click **Revoke**. The Revoke Workitem dialog appears.
4. In the **Comment** box, specify a brief description and click **Revoke**. The workitems get revoked.

Once you revoke workitems, they automatically move out of the My Workitems list of the referred user to your queue in which the workitems originally belonged. The workitems appear in editable mode.

Reassigning workitems

You can reassign workitems to other users. Reassignment is possible only if it is allowed on the queue in which the workitems are present. You can reassign a workitem to any other member of the same queue.

To reassign the workitem, perform the following steps:

1. On the Workspace page, from the left pane, click **My Workitems**. The worklist appears in the right pane.
2. Select the checkboxes against the required workitems. The related operations appear in the upper-right corner.

3. Click **Reassign**. The Reassign Workitem(s) dialog appears. It displays the current user who is working on the selected workitem.
4. In the Select User section, select a user to refer the workitems. For procedural details, see step 4 of the Referring workitems section.
5. In the **Comments** box, enter a brief description and click **Assign**. The workitems get reassigned successfully and appear in My Workitems of the selected user.

Viewing properties of a workitem

You can view the basic, current status, and other details of a workitem.

To view the properties of a workitem, perform the following steps:

1. On the Workspace page, from the left pane, click **My Workitems**. The worklist appears in the right pane.
2. Select the checkbox against the required workitem. The related operations appear in the upper-right corner.
3. Click **Properties**. The Properties dialog appears. It displays the basic details, current status, and other details of the selected workitem.

Releasing workitems

Once your work is done on a locked workitem or if the other user requires to work on it, then you can release the locked workitem to make it available for other users in the shared queue. As you release the workitem, it moves from the My Workitems tab to the corresponding shared queue where the workitem originally belongs.

To release a workitem, perform the following steps:

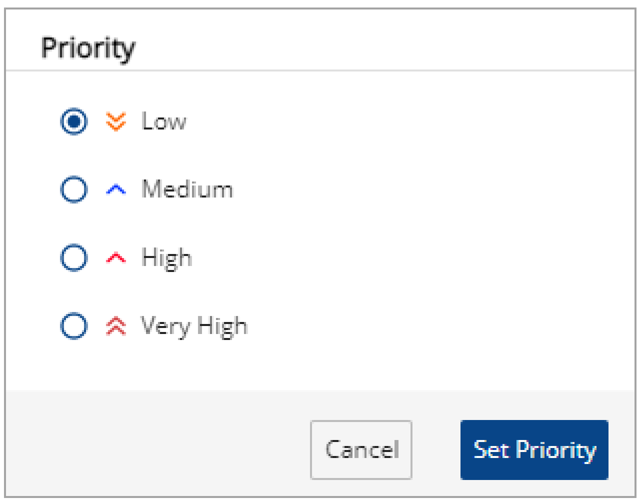
1. On the Workspace page, from the left pane, click **My Workitems**. The worklist appears in the right pane.
2. Select the checkboxes against the workitems that you have locked. The related operations appear in the upper-right corner.
3. Click **Release**. The message "Workitem(s) were released" appears. Once released the workitem moves from the My Workitems tab to the shared queue.

Setting priority for workitems

You can set the priorities for workitems as low, medium, high, and very high based on your requirements. Setting the priorities for workitems helps you to track and manage your workitems effectively.

To set or change priority for workitems, perform the following steps:

1. On the Workspace page, from the left pane, click **My Workitems**. The worklist appears in the right pane.
2. Select the checkboxes against the required workitems. The related operations appear in the upper-right corner.
3. Click **Priority**. The Priority dialog appears.



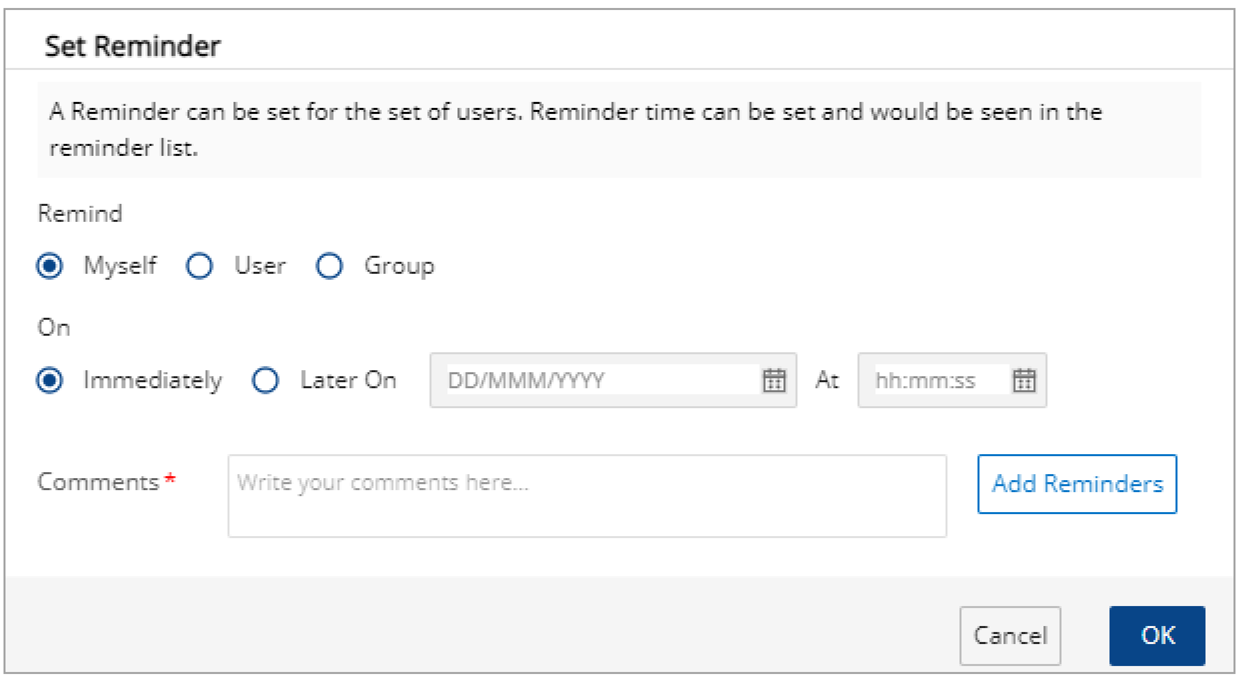
4. Select the **Low**, **Medium**, **High**, or **Very High** priority option based on your requirements.
5. Click **Set Priority**. The priority gets set. You can change the priority of a workitem by performing the above steps.

Setting reminders for workitems

You can set a reminder for any workitem. A reminder is a notification that gets flashed to all the selected users. You can set the time at which you want to flash the notification and can also select the members to receive the reminders.

To set the reminders for workitems, perform the following steps:

1. On the Workspace page, from the left pane, click **My Workitems**. The worklist appears in the right pane.
2. Select the checkboxes against the required workitems. The related operations appear in the upper-right corner.
3. Click **Set Reminder**. The Set Reminder dialog appears.



4. Specify the following details:

Section	Field	Action
Reminder	Myself	Sets a reminder only for you.
	User	Sets a reminder for other members of Workspace.
	Group	Sets a reminder for existing groups of Workspace.

Section	Field	Action
On	Immediately	Sets a reminder for the current time.
	Later On	Allow setting a reminder for a later time.
Comments		Enter a brief description that appears for reminder notification.

5. Click **Add Reminders**. The reminder gets added under the **Reminder(s)** section. Here, you can delete the added reminder by selecting the checkbox against the specific reminder and clicking the **Delete** button.
6. Click **OK** to finalize. Once the reminder is set, it appears in the Reminder List of the selected users or groups at the defined time.

Holding a workitem

You can hold any workitem temporarily or for a particular duration. A workitem once put on hold moves from a shared queue to your My Workitems list.

To hold a workitem, perform the following steps:

1. On the Workspace page, from the left pane, click **My Workitems**. The worklist appears in the right pane.
2. Select the checkbox against the required workitem. The related operations appear in the upper-right corner.
3. Click **Hold**. The Hold dialog appears.
4. Select one of the following options:
   - **Temporary Hold** — Selecting this option holds the workitem temporarily until you un-hold it manually.
   - **Activity Hold** — Selecting this option holds the workitem for a particular duration of time. As you select the **Activity Hold** option, a dropdown list appears. Select an activity from the dropdown list and click **OK**.
5. In the **Comments** box, specify the reason for holding the workitem.
6. Click **Hold**. The workitem moves to your My Workitems list.

Once the purpose of holding a workitem is achieved, you can manually un-hold the workitem or the workitem automatically returns to the process.

Related topic(s):

Unhoding a workitem

Unholding a workitem

You can unhold a workitem that was put on hold. Once you unhold the workitem, you can further work on it.

To unhold a workitem, perform the following steps:

1. On the Workspace page, from the left pane, click **My Workitems**. The worklist appears in the right pane.
2. Select the checkbox against the required held workitem. The related operations appear in the upper-right corner.
3. Click **Unhold**. The Unhold dialog appears.
4. In the **Comments** box, specify the reason for unholding the workitem.
5. Click **Unhold** to finalize.

Finishing your task on a workitem

Once your work on a workitems is completed, you can mark it as done. You can also mark a workitem as done even without opening it in Workdesk.

To complete a workitem, perform the following steps:

1. On the Workspace page, from the left pane, click **My Workitems**. The worklist appears in the right pane.
2. Select the checkbox against the required workitem. The related operations appear in the upper-right corner.

3. Specify the required details for the selected workitem and then click **Done**. The workitem gets completed and disappears from the worklist. The completed workitem routes to the next workstep, provided the processing server is running.

   The Done operation is enabled for only those workitems that are initiated in the process.

Other operations on workitem

This section describes the following operations on the My Workitems panel:

- Show Count
- Reminder List
- User Preferences
- Download

The above operations appear on clicking the **Actions** dropdown list from the right pane of the My Workitems panel.

Viewing count of workitems

You can view the count of workitems available in the worklist of a queue.

To view the workitems count, perform the following steps:

1. On the Workspace page, from the left pane, click **My Workitems**.
2. From the right pane, click the **Actions** dropdown list and then select **Show Count**. A count of the workitems appears against the selected queue name in the right pane.

Viewing reminder list

You can view and dismiss the reminder notifications that are set for you.

To view the reminder list, perform the following steps:

1. On the Workspace page, from the left pane, click **My Workitems**.

2. From the right pane, click the **Actions** dropdown list and then select **Reminder List**. The Reminder List dialog appears.
   Here, you can download or delete reminder notifications by selecting the checkboxes against the notifications and then clicking **Download** or **Delete** as required.

Setting user preferences

You can set the preference for listing workitems in a worklist, sequencing of workitem operation, and other preferences.

Users can customize their preferences only for the settings that the admin has enabled in the global preferences.

To set the preferences, perform the following steps:

1. On the Workspace page, from the left pane, click **My Workitems**.
2. From the right pane, click the **Actions** dropdown list and then select **User Preferences**. The User Preferences dialog appears containing various tabs to set user preferences.
3. In the General tab, specify the following fields:

Field	Description
Select Default Queue	Allows you to select the default queue.
Default Quick Search Variable	Allows you to select the default quick search variable.
Workitem History Order	Allows you to select the workitem history in ascending or descending order.

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

9. The icon allows you to arrange the sequence of the worklist column header by drag and drop functionality.
10. Click the **Workitem Operations** tab. The list of workitem operations header appears.
11. Enable or disable the toggle to show or hide the column header based on your requirements.
12. Click the **Document Operations** tab and specify the following details:
    - Document SortOrder — Allows to sort the document in ascending or descending order from the dropdown list.
    - Document OrderBy — Allows to order the document in different categories from the dropdown.
    - Resize Option — Allows to resize the document in a different mode from the dropdown.
    - Resize Percentage — Allows to resize the document in percentage.

      This option is only enabled when the Resize Option is selected as the PercentageMode.
13. Click **Save Changes**. The User Preferences get saved and the worklist is modified based on the defined preferences.

Downloading worklist

You can download the worklist of workitems in the required format.

To view the reminder list, perform the following steps:

1. On the Workspace page, from the left pane, click **My Workitems**.
2. From the right pane, click the **Actions** dropdown list and select **Download**. The following list of formats appear:
   - PDF
   - CSV
   - TXT
   - XLSX
3. Select any of the above formats based on your requirements. The worklist of the selected queue gets downloaded to your local system.

Performing operations on shared queues

Shared queues are categorized as follows:

- **Initiation queue** — It contains the worklist of ready to initiate workitems that are shared among different users of a Workspace. You can perform the following operations on the workitem available in the initiation queue:

  > The procedures of the Properties, Priority, and Set Reminder operations of Initiation queues are similar to the operations explained for My Workitems. The only difference is that while performing these operations for the Initiation queue, instead of selecting My Workitems, you must select the Initiation queue from the left pane of the Workspace page.

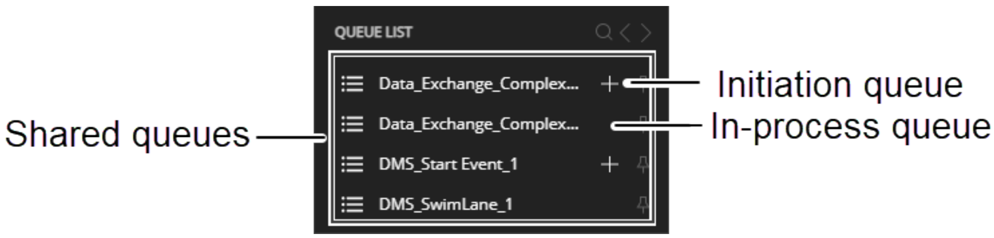
  - Create new workitem
  - Initiate
  - Properties
  - Priority
  - Set Reminder
  - Delete
  - Form (Bulk initiation)

- **In-process queue** — It contains the worklist of the workitems that are shared among different users of a Workspace and are already in process. You can perform the following operations on the workitem available in the in-process queue:

  > The procedures of the Done, Refer, Revoke, Reassign, Properties, Priority, Set Reminder, Hold, and Unhold operations of In-process queues are similar to the operations explained for My Workitems. The only difference is that while performing these operations for the In-process queue, instead of selecting My Workitems, you must select the In-process queue from the left pane of the Workspace page.

  - Done
  - Refer
  - Revoke
  - Reassign
  - Properties

- Assign to me
- Priority
- Set Reminder
- Hold
- Unhold
- Form (Bulk completion)



In addition to the above-mentioned operations, you can also perform the following operations on the shared queues:

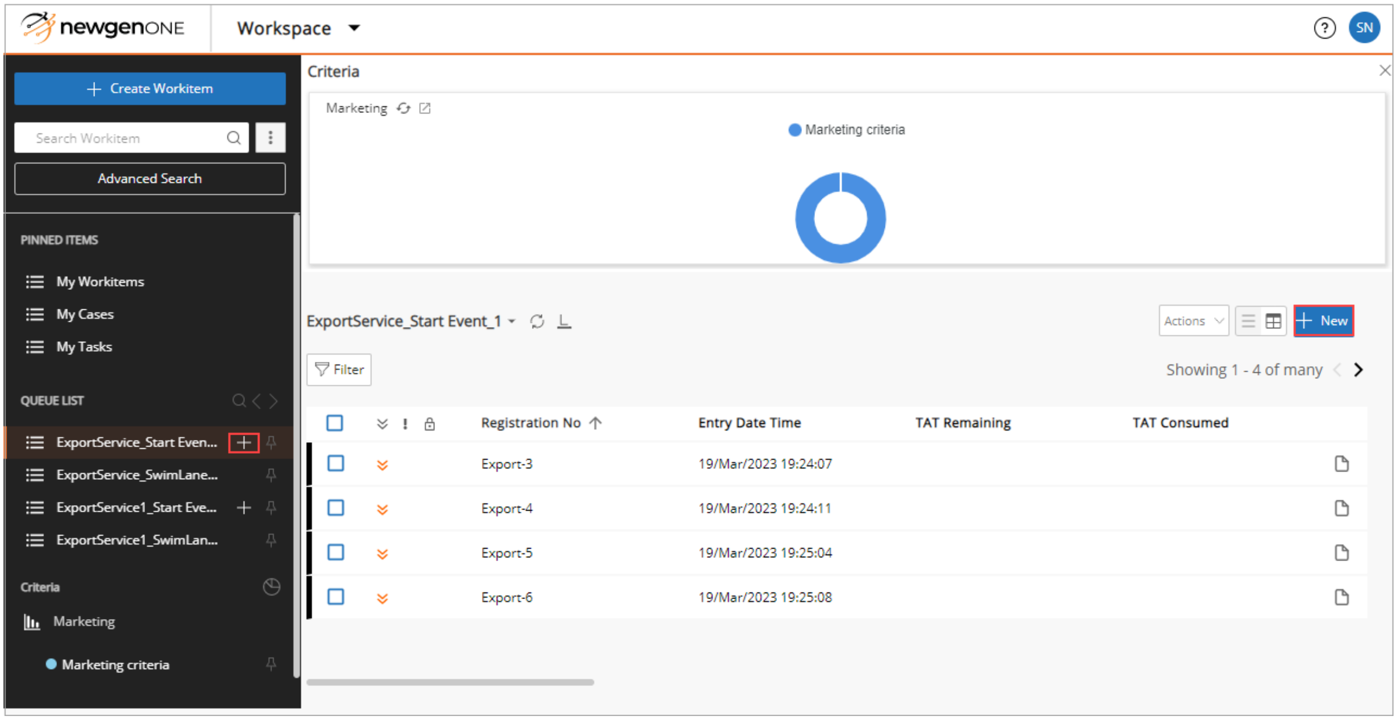
> The procedures of the Show Count, Reminder List, User Preferences, and Download operations of shared queues are similar to the other operations explained for My Workitems. The only difference is that while performing these operations for a shared queue, instead of selecting My Workitems, you must select a shared queue from the left pane of the Workspace page.

- Show Count
- Reminder List
- User Preferences
- Download

Creating a new workitem

You can create a new workitem in an initiation queue. This is an additional method of creating a new workitem besides the procedure explained in the Creating a workitems section.

To create a new workitem, go to the required initiation queue, and then click the add icon **+** against it. Alternatively, in the right pane, click **+ New**. A new workitem is created and the Workdesk page appears where you can perform further operations. For more detail, see the Performing operations on Workdesk section.



Related topic(s):

Initiating a workitem

Initiating a workitem

Once a workitem is created in an initiation queue, you can perform the defined workstep on it and then make it part of your defined process by initiating it. An initiated workitem moves from the initiation queue to the in-process queue based on the defined process.

For workitem to get routed to the next workstep, the processing server must be running. To register and configure the process server, refer to the *NewgenONE System Admin Administration Guide*.

To initiate a workitem, perform the following steps:

1. On the Workspace page, from the left pane, select the required initiation queue. The worklist of the selected queue appears in the right pane.
2. Select the checkbox against the required workitem. The related operations appear in the upper-right corner.

3. Click **Initiate**. The workitem gets initiated in the underlying process and disappears from the worklist of the select initiation queue.

Initiating workitems in bulk

You can initiate multiple workitems simultaneously. Bulk initiation is possible only if it is permitted on the selected queue. In this operation, a simple form having input fields associated with each workitem appears and initiates multiple workitems simultaneously.

To initiate multiple workitems, perform the following steps:

1. On the Workspace page, from the left pane, select the required initiation queue. The worklist of the selected queue appears in the right pane.
2. Select the checkboxes against the required workitems. The related operations appear in the upper-right corner.
3. Click **Form**. The Form Fields dialog appears.
4. Specify the inputs in the available fields.
5. Click **Initiate**. The workitems get initiated.
   Once the workitems are initiated, they are routed to the next workstep in the defined process.

   > For workitems to get routed to the next workstep, the processing server must be running. To register and configure the process server, refer to the *NewgenONE System Admin Administration Guide*.

Deleting workitems

You can delete only those workitems that are created in a queue but are not initiated.

To delete the workitems, perform the following steps:

1. On the Workspace page, from the left pane, select the required initiation queue. The worklist of the selected queue appears in the right pane.
2. Select the checkboxes against the specific workitems. The related operations appear in the upper-right corner.
3. Click **Delete**. The Delete dialog appears.
4. Click **Delete** to confirm. The workitem gets deleted and disappears from the worklist of the selected Initiation queue.

Completing multiple workitems

You can complete multiple workitems simultaneously from an in-process queue. In this operation, a common form is used for all workitem that contains the entire field associated with each workitems. You can specify the input in the Form Fields to finalize the multiple workitems simultaneously.

To complete multiple workitem simultaneously, perform the following steps:

1. On the Workspace page, from the left pane, click a required in-process queue. The worklist of the selected queue appears in the right pane.
2. Select the checkboxes against the required workitems. The related operations appear in the upper-right corner.
3. Click **Form**. The Form Fields dialog appears.
4. Specify the required details and then click **Done**. The workitems disappear from the worklist and get routed to the next workstep, provided the processing server is running.

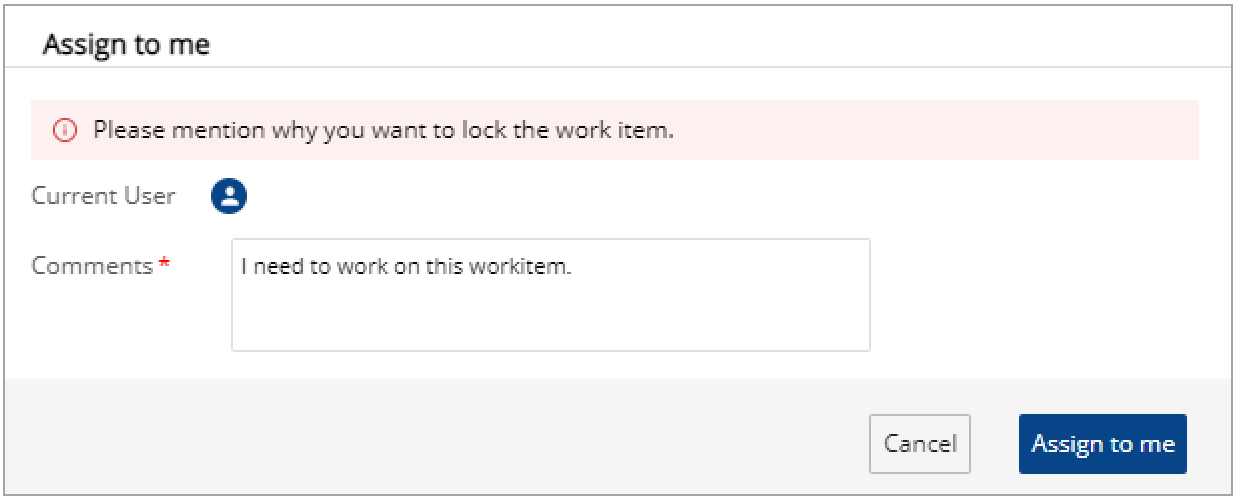
> The Form operation is enabled for only those workitems that are initiated in the process.

Locking or assigning a workitem

You can assign workitems to yourself from a shared queue. This feature is useful when you want to maintain some important workitems in your My Workitems queue and work on them at a later time. A lock icon appears in front of the workitem that you have assigned to yourself.

To assign workitems to yourself, perform the following steps:

1. On the Workspace page, from the left pane, select the required in-process queue. The worklist of the selected queue appears in the right pane.
2. Select the checkboxes against the required workitems. The related operations appear in the upper-right corner.
3. Click **Assign to me**. The Assign to me dialog appears.



4. In the **Comments** box, specify the reason why you want to assign the selected workitem to yourself.
5. Click **Assign to me** to finalize. The selected workitems assigned to you appear in your My Workitems list.

Performing operations on My Cases

A Case in Workspace defines a series of tasks to achieve a specific goal. For example, to take a loan from a bank is a case, then verifying your loan eligibility such as KYC details, address proof, and income details might be a series of tasks.

The Workspace facilitates you to handle the task-based workitems as a case workstep. The My Cases tab allows you to work on cases that are assigned to you.

Perform the following operations on a case assigned to you:

> The procedures of the Done, Reassign, Priority, Set Reminder, and Properties operations of My Cases are similar to the operations explained for My Workitems. The only difference is that while performing these operations for My Cases, instead of selecting My Workitems, you must select the My Cases from the left pane of the Workspace page.

- Done
- Reassign
- Priority
- Set Reminder
- Properties

In addition to the above-mentioned operations, you can also perform the following operations on the My Cases worklist:

- Filtering cases worklist — To filter the cases worklist, perform the following steps:
  a. On the My Cases panel, Click **Filter**.
  b. Select the required filter criteria and click **Apply**. The filtered results appear. You can click **Clear** to reset the filtered criteria and results.
- Searching a case — To search a case, perform the following steps:
  a. On the My Cases panel, from the Case ID dropdown list, select **Case ID** or **Case Name**.
  b. In the **Search** box, enter the required case ID or case name and then click the search icon . The searched case appears on which you can perform the required operation.

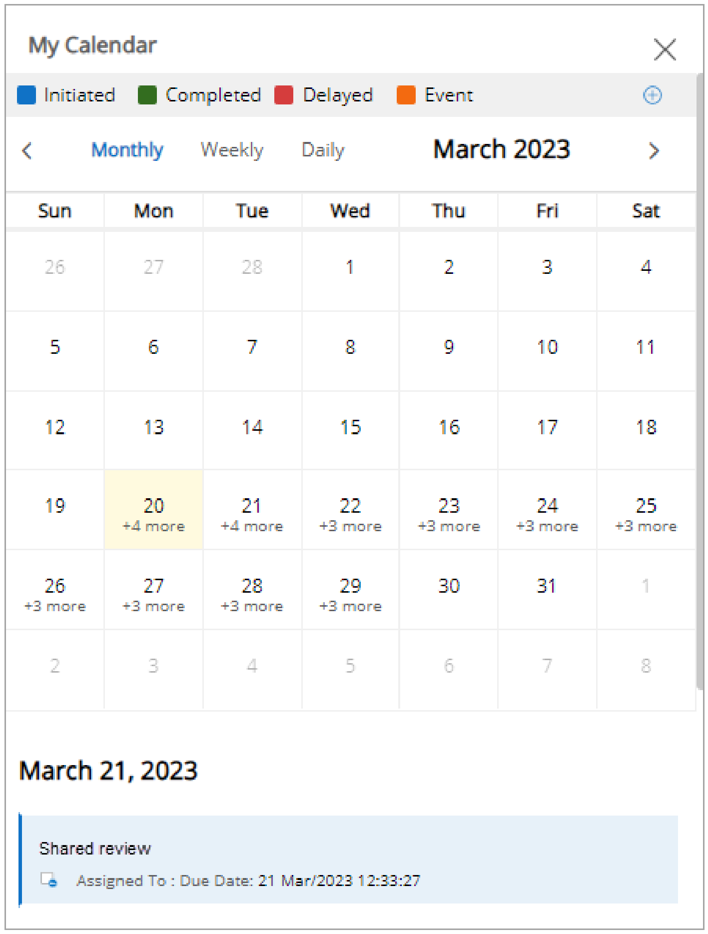
- Viewing, deleting, and downloading case reminders — To view, delete, and download case reminders, perform the following steps:
    a. On the My Cases panel, click the **Actions** dropdown list and select **Reminder List**. The Reminder List dialog appears listing all the reminders.
    b. To delete a reminder, select the checkbox against it and click **Delete**. The reminder gets removed from the list.
    c. To download a reminder, select the checkbox against it and click **Download**. The reminder gets downloaded into your system.
- Setting preferences — To set case worklist preferences, perform the following steps:
    a. On the My Cases panel, click the **Actions** dropdown list and select **My Preferences**. The My Preferences dialog appears.
    b. Specify the required details under **Case Preferences**, **CaseFile/Summary Preference**, and **User Preferences** sections.
    c. Click **Save**. The preferences are set.

Adding an event

The My Cases panel allows you to add an event among different users or groups of Workspace modules to work or collaborate on common agenda.

To add an event, perform the following steps:

1. On the Workspace page, from the left pane, click **My Cases**. The case worklist appears in the right pane.
2. From the right pane, click the calendar icon . The My Calendar pane appears.



3. Click the add event icon . The Add Event dialog appears.
4. Specify the following fields:

Field	Description
Event Name	Enter the name for the event.
Event Description	Provide a description of the event.
Event Timing	Enable the **Full Day Event** toggle if the event lasts for 24 hours or a complete day. In this case, specify the **Start Date** and **End Date** for the event. Disable the **Full Day Event** toggle if the event lasts for a specified time interval. In this case, specify the **Start Date** and **End Date** for the event. You can also select the event time for the start and end dates from the **Start Date** and **End Date** fields.
Add Guests	Select the guests to invite for the event based on User Name, Personal Name, Group, or Expertise. For procedural details, see step 4 of the Referring workitems section.

5. Click **Ok**. The added event appears to all the selected users at the bottom of the My Calendar dialog.
   You can track the status of the event by referring to the color code defined at the top of the My Calendar dialog.

Modifying an event

You can modify an added event if required.

To modify an event, perform the following steps:

1. On the Workspace page, from the left pane, click **My Cases**. The case worklist appears in the right pane.
2. From the right pane, click the calendar icon . The My Calendar pane appears.
3. Click the edit icon against the event that you want to modify.
4. Modify the details as explained in the Adding an event section.
5. Click **Modify**. The event gets modified.

Deleting an event

You can delete an added event.

To delete an event, perform the following steps:

1. On the Workspace page, from the left pane, click **My Cases**. The case worklist appears in the right pane.
2. In the right pane, click the calendar icon . The My Calendar pane appears.
3. Click the edit icon against the event that you want to delete.
4. Click **Delete**. The event is removed from the list of events.

Performing operations on My Tasks

A Task in Workspace is a part of the case workstep. For example, approving a loan may involve the following tasks:

- KYC details verification
- Address proof verification
- Income details verification

The Workspace facilitates you to handle task-based workitems effectively. The My Tasks tab allows you to work on tasks assigned to you. You can perform the following operations on a task assigned to you:

> The procedures of the Set Reminder, Priority, and Done operations of My Tasks are similar to the operations explained for My Workitems. The only difference is that while performing these operations for My Tasks, instead of selecting My Workitems, you must select the My Tasks from the left pane of the Workspace page.

- Mark as Read or Unread
- Decline
- Reassign
- Set Reminder
- Priority
- Done

In addition to the above-mentioned operations, you can also perform the following operations on the My Tasks worklist:

- Filtering tasks worklist — To filter the tasks worklist, perform the following steps:
    a. On the My Tasks panel, Click **Filter**.
    b. Select the required filter criteria and click **Apply**. The filtered results appear. You can click **Clear** to reset the filtered criteria and results.
- Searching a task— To search for a task, perform the following steps:
    a. On the My Tasks panel, from the Task Name dropdown, select **Task Name** or **Case ID**.

   b. In the **Search** box, enter the required task name or case ID and then click the search icon . The searched task appears. You can perform the required operation on the task.
- Viewing, deleting, and downloading task reminders — To view, delete, and download task reminders, perform the following steps:
   a. On the My Tasks panel, click the **Actions** dropdown list and select **Reminder List**. The Reminder List dialog appears listing all the reminders.
   b. To delete a reminder, select the checkbox against it and click **Delete**. The reminder gets removed from the list.
   c. To download a reminder, select the checkbox against it and click **Download**. The reminder gets downloaded into your system.
- Setting preferences — To set task worklist preferences, perform the following steps:
   a. On the My Tasks panel, click the **Actions** dropdown list and select **My Preferences**. The My Preferences dialog appears.
   b. Specify the required details under **Case Preferences**, **CaseFile/Summary Preference**, and **User Preferences** sections.
   c. Click **Save**. The preferences are set.

Marking as read or unread

To mark a task as read or unread, perform the following steps:

1. On the Workspace page, from the left pane, click **My Tasks**. The task worklist appears in the right pane.
2. Select the required tasks to mark as read or unread. The list of available operations appears in the upper-right corner of the worklist pane.

   > In case the selected workitem was previously marked as read, then the operation displays as *Mark as Unread*. Similarly, if the selected workitem was previously marked as unread, then the *Mark as Read* operation appears.

3. Click **Mark as Read** or **Mark as Unread**. The task is marked as read or unread.

Declining a task

To decline a task, perform the following steps:

1. On the Workspace page, from the left pane, click **My Tasks**. The task worklist appears in the right pane.
2. Select the required task. The list of available operations appears in the upper-right corner of the worklist pane.
3. Click **Decline**. The task gets declined.

Reassigning a task

It is possible to reassign a task to another user or group of the Workspace module. This section describes how to reassign a task.

To reassign a task, perform the following steps:

1. On the Workspace page, from the left pane, click **My Tasks**. The task worklist appears in the right pane.
2. Select the required task. The list of available operations appears in the upper-right corner of the worklist pane.
3. Click **Reassign**. The Task Reassign dialog appears. This dialog consists of the following tabs:
    - **Assignment** — Allows you to specify the instruction for the task goal. If you want to assign the task to yourself, then select the **Assign to me** checkbox and proceed further. Otherwise, to select a specific user for assigning the task, see step 4 of the Reassigning workitems section.
    - **Rights** — Allows you to select the general rights for a task. It also allows you to configure the properties for Form, Exception, and Document.
    - **Associated Form** — Contains the field of associated form and allows you to fill the required inputs.
4. Once all the mandatory fields are filled, click **Reassign**. The task moves to the My Tasks tab of the assigned user or group.

Performing operations on Workdesk

This chapter includes:

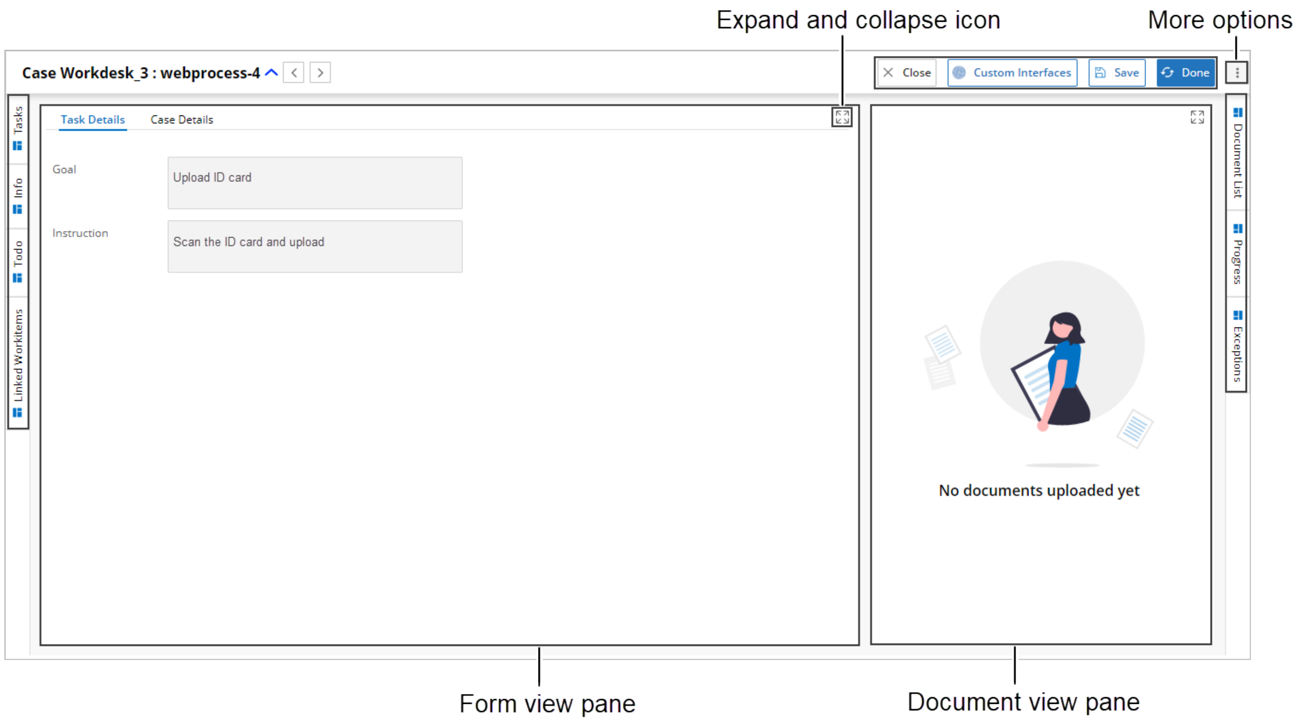
Opening a workitem in Workdesk

Workspace facilitates you to open a workitem in the Workdesk to work on a required workstep.

To open a workitem in the Workdesk, perform the following steps:

1. On the Workspace page, from the left pane, click the required queue. The worklist of the selected queue appears in the right pane.
2. Double-click any of the workitem. The workitem opens on the Workdesk page.

> The options on the Workdesk page appear based on the interface, settings, and functionalities selected while defining the process in the Process Designer module. For more details, refer to the *NewgenONE Process Designer User Guide*.



Based on the configuration settings while creating the process in the NewgenONE Process Designer module, the following options appear on the Workdesk page:

Option	Description
Tasks	Displays the list of tasks associated with workitem. This tab appears only for the Case Workdesks. For more details, see the Working on Tasks section. The Case Workdesks are designed and configured in the *NewgenONE Process Designer* module to manage the required tasks.
Info	Displays the detailed information of a workitem such as: • **Properties** — Displays the basic details, current status details, and other details for a workitem. • **History** — Displays the log of actions or activities performed on a selected workitem. It also allows you to search, sort, export (XLS, TXT, or CSV format), and print the listed activities. • **Comment** — Displays the list of comments corresponding to the performed activity along with details of the comment's publisher and receiver names. • **TAT Report** — Displays the Turn Around Time (TAT) for each worksteps.

Option	Description
Todo	Displays a thorough inventory of tasks that must be finished during a specific stage of a workitem. For more details, see the Processing Todo lists section.
Linked Workitems	Allows you to link a workitem with another workitem. You can provide the reference of a linked workitem from another workitem. Also, you can link the same workitem with multiple workitems. For more details, see the Linking or de-linking a workitem section.
Document List	Allows you to upload documents and displays the list of documents associated with the workitem. For more details, see the Working on Document List section.
Progress	Displays the progress of the workitem. It also displays the user who initiated, worked, and completed the workitem along with the date and time details. Additionally, there are color-coded indicators for various statuses, such as Initiated, Completed Activity, Completed, Revoked, Declined, Next Activity, Ready, and Waiting.
Exceptions	Workdesk provides the facility to define a list of exceptions that can be raised or cleared at a particular workstep. For more details, see the Raising and modifying exceptions section.
Form view pane	Displays the fields to associate the data with the workitem.
Document view pane	Displays the uploaded document and allows you to perform the permitted operations on the uploaded document.
Expand and collapse icon	This icon allows you to expand and collapse the view of the Form view pane or Document view pane as required.
Close	Allows you to close the opened Workdesk page.
Custom Interface	You can define a template of the corresponding workstep or activity at the time of deployment, to display a customized view. In a customized view, you can set the position and number of sections to display in the Workdesk. You can define only one template for one activity in a process. While opening a workitem, if you find a template for an activity and process, then the workitem gets visible according to the given template. If no template is defined for that activity, then the workitem is visible according to the default template.
Save	Saves the operations performed on the Workdesk.

Option	Description
Done	Allows you to complete your task on the workitem. This option depends on the workstep type. For example, in case of the start event workstep the Done option gets replaced with the Introduce option.
More options	Allows you to perform a set of permitted operations, search for documents and folders from OmniDocs, and edit the layout of the Workdesk page. To perform a specific operation, click **Operations** and select the required option. For procedural details, see the Performing operations on My Workitems section. Also an additional option, Interfaces, appears, in case SAP definitions are configured in the workstep during process designing. Click **Interfaces** and then select the required SAP definition from the list. Once you select the SAP definition, an SAP sign-in page appears. Here, you can enter the SAP sign-in credentials and further use them.

Processing Todo list

The Todo tab usually displays a thorough inventory of tasks that must be finished during a specific workstep of a workitem. This helps to ensure that no essential tasks or items are overlooked during the process execution. The Todo tab displays the to-do list based on the configuration settings done while designing the process in the NewgenONE Process Designer module.

To process a to-do list, perform the following steps:

1. On the Workdesk page, click the **Todo** tab. The To Do (s) pane appears. It displays the list of all the to-do items associated with the workstep. Following are the types of to-do items:
   - *Mark* — A type of to-do item that provides the selection options as **Yes**, **No**, and **NA**.
   - *Picklist* — A type of to-do item that provides a dropdown list displaying all the defined picklist options.
   - *Trigger* — A type of to-do item that provides the **Execute** button. Clicking this button executes the defined action for the selected to-do item.
2. Select an option for to-do items based on your requirements.
3. In the **Remark** box, enter a brief description.

4. Click **Save**. The to-do list is processed successfully.

Working on Exceptions

Exceptions are a common occurrence in all types of business scenarios. Usually, business processes have provisions for handling exceptions in unique situations. The authorized users of the system can raise exceptions whenever necessary. The processes are designed to redirect exceptional cases to alternative paths.

The Exception tab allows you to view and raise the exceptions that you might encounter while working on a workitem. The exceptions are defined while designing a process and you can select the defined exception while raising it. Additionally, you can view, respond, clear, reject, and view a history of an exception if it is configured while designing a process.

The Clear and Respond operations are not applicable for workitems in the initiation queue.

For example, when an income document is missing, processing a credit card application can be considered an exception. However, an authorized user can clear this exception.

You can perform the following operations in the Exceptions tab:

- Raising an exception
- Modifying a comment of an exception
- Responding to an exception
- Rejecting an exception
- Clearing an exception
- Viewing the history of an exception
- Filtering the exceptions

Raising an exception

To raise an exception, perform the following steps:

1. On the Workdesk page, click the **Exception** tab. The exception pane appears. It contains the list of all raised exceptions, if any.

2. Click **Raise Exception**. The Raise New Exception dialog appears.
3. From the **Category** dropdown list, select an exception category.
4. From the **Type** dropdown list, select an exception type.
5. In the **Comment** box, enter a brief description.
6. Click **Raise** to continue. The added exception appears in the In Draft status under the selected category. Here, you can select the following options:
   a. **Discard** — Allows you to discard the added exception.
      i. Click **Discard**. The Undo Exception dialog appears.
      ii. Enter the reason to undo the exception.
      iii. Click **Save**. The exception gets discarded from the exception list.
   b. **Commit** — Allows you to commit the added exception. Once the exception is committed, you cannot undo it.
      i. Click **Commit**. The Commit Exception dialog appears.
      ii. Enter a brief description.
      iii. Click **Save**. The exception appears in the Raised status.
7. Click **Save**. Once the exception is raised, the exception "!" icon appears against the workitem in the worklist.

Modifying a comment of an exception

To modify a comment of an exception, perform the following steps:

1. Click the edit icon against the required exception. The Modify Comments dialog appears.
2. (Optional) Modify a comment based on your requirements.
3. Click **Save**. The comment gets modified.

Responding to an exception

To respond to an exception, perform the following steps:

1. Click **Respond** against the required exception. The Respond Exception dialog appears.
2. (Optional) Specify a comment.
3. Click **Respond**. The exception displays the Responded and the In Draft status.
4. Click **Commit**. The Commit Exception dialog appears.

5. (Optional) Specify a comment.
6. Click **Save**. The exception gets responded and the Reject option appears.
   You can reject the responded exception by clicking **Reject** and for further steps, see the Rejecting an exception section.

Rejecting an exception

To reject the responded exception, perform the following steps:

1. Click **Reject** against the required exception. The Reject Exception dialog appears.
2. (Optional) Specify a comment.
3. Click **Reject**. The exception displays the Reject and the In Draft status.
4. Click **Commit**. The Commit Exception dialog appears.
5. (Optional) Specify a comment.
6. Click **Save**. The responded exception gets rejected.
   You can again respond to the rejected exception by clicking **Respond** and for further steps, see the Responding to an exception section.

Clearing an exception

To clear an exception, perform the following steps:

1. Click **Clear** against the required exception. The Clear Exception dialog appears.
2. (Optional) Specify a comment.
3. Click **Clear**. The exception displays the Clear and the In Draft status.
4. Click **Commit**. The Commit Exception dialog appears.
5. (Optional) Specify a comment.
6. Click **Save**. The exception gets cleared.

Viewing the history of an exception

To view the history of an exception, click the required exception. The History dialog appears. It displays a detailed list of all the operations performed on the selected exception.

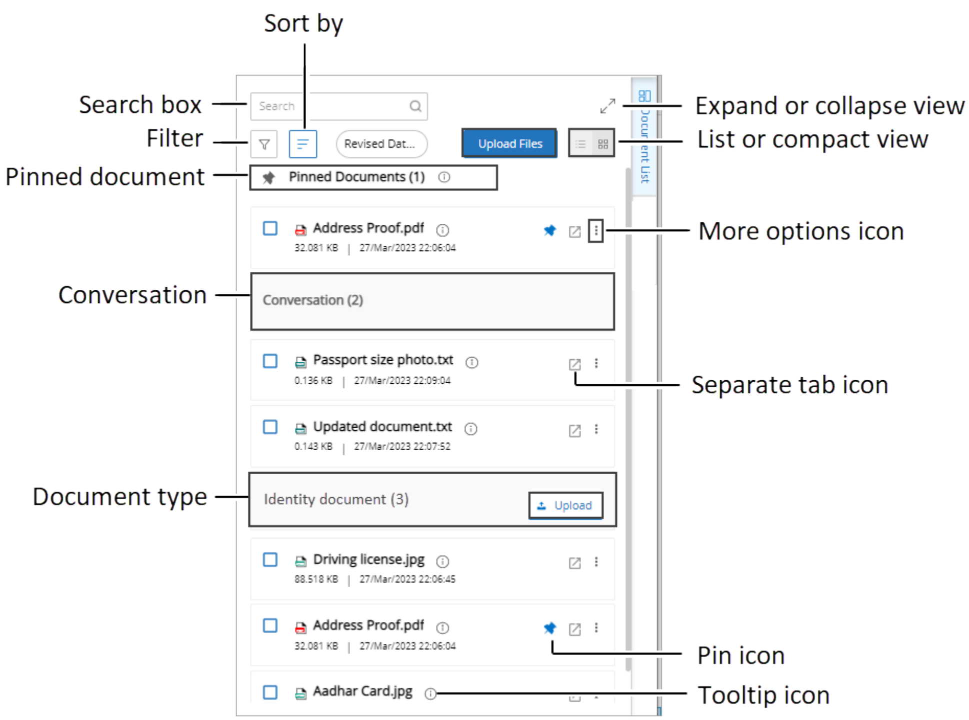
Filtering the exceptions

To filter the exceptions, perform the following steps:

1. On the Exception pane, click the filter icon from the upper-right corner. The Apply Filters dialog appears. It displays a list of filter criteria.
2. Select one of the following filters criteria:
   - **All** — To filter all the exceptions in the drafts, raised, responded, rejected, and cleared status.
   - **In Drafts** — To filter exceptions that are in draft status.
   - **Raised** — To filter exceptions that are in raised status.
   - **Responded** — To filter exceptions that are in responded status.
   - **Rejected** — To filter exceptions that are in rejected status.
   - **Cleared** — To filter exceptions that are in cleared status.
3. Select the **Group By Category** checkbox to filter exceptions along with the group names.
   If you want to reset the filter criteria, click **Reset to default**.
4. Click **Apply**. The filtered results appear.

Working on Document List

The Document List tab allows you to upload and view the required documents. The Workdesk supports the OpAll viewer tool to display the uploaded document. To view or upload documents for a workitem, open the workitem in Workdesk and click the Document List tab.



The Document List tab contains the following options:

Option	Description
Upload Files or Upload	Allows you to upload documents from your local system, scanner, or using drag and drop. If OmniDocs is integrated, an option to upload documents from OmniDocs also appears. The Workdesk has a file size limit of 4 MB for JPG, PNG, or TIFF file uploads. For procedural details, see the Uploading documents and Uploading a document using scanner sections.

Option	Description
Document type	Displays a list of similar types of documents. It also displays the count of documents available in a document list. This type of arrangement helps you to easily navigate to the required documents. Based on the configuration defined for a particular process in the NewgenONE Process Designer module, the name of the specific document types is displayed in the Document List tab. It is possible to define multiple document types from NewgenONE Process Designer.
Conversation	Displays a list of conversations in TXT format. It also displays the count of conversations available in a conversation list. Here, you can click any of the conversations to view associated comments along with various details such as the conversation added by, activity name, queue name, and publishing time of the conversation. For procedural details, see the Conversation section.
Pinned document	Displays a list of pinned documents. It also displays the count of conversations available in a list.
More options icon	Clicking this icon allows you to access the following options: • Checkout or Checkin — Selecting the **Checkout** option allows you to check out the document to work on it offline. As you select the Checkout option, the Check Out Document dialog appears. Here, you can click the download icon to download the current version of a document or else click **Undo Checkout** to revoke the Checkout operation. Once you updated the checked-out document, you can again upload the updated document by selecting the **Checkin** option. • Delete — Selecting this option deletes the document from the listed documents. • Version(s) — Selecting this option allows you to create a new document version. It also allows you to set any previous version as the latest and add comments. • Download — Selecting this option downloads the document to your local system. For the documents listed under Conversation, only the Version(s) option is available.
Filter	Clicking the **Filter** icon allows you to filter the documents based on document type, file type, last modified, and uploaded by filters.

Option	Description
Sort by	Clicking the **Sort by** icon allows you to sort the documents based on sort within or across the documents, sorting order ascending or descending, sort by file type, document name, document size, document type, or more.
Search box	Allows you to search the document by its name.
Expand or Collapse view	Clicking the **Expand** icon displays the Document List pane in an expanded view. Whereas, clicking the **Collapse** icon displays the Document List pane to its default size.
List or compact view	Selecting the **List View** icon displays the documents in list view. Whereas, selecting the **Compact View** icon displays the documents in compact view.
Separate tab icon	Clicking the icon opens the document in a separate browser tab.
Pin icon	The pinning of document functionality allows you to pin the documents that are frequently used. As you hover over a document the pin icon appears. You can click the pin icon to set the document as a favorite. As you click the pin icon, it turns to a blue pin icon indicating the pinned status and the pinned document also appears in a list of Pinned Documents.
Tooltip icon	Clicking the tooltip icon provides extensive details of the uploaded document such as document version, owner name, number of pages in a document, last modified date and time, and comments.

Uploading documents from your local machine

The Document List tab of Workdesk allows you to upload the required documents from your local machine, scanner, or using drag and drop functionality.

To upload documents from your local machine, perform the following steps:

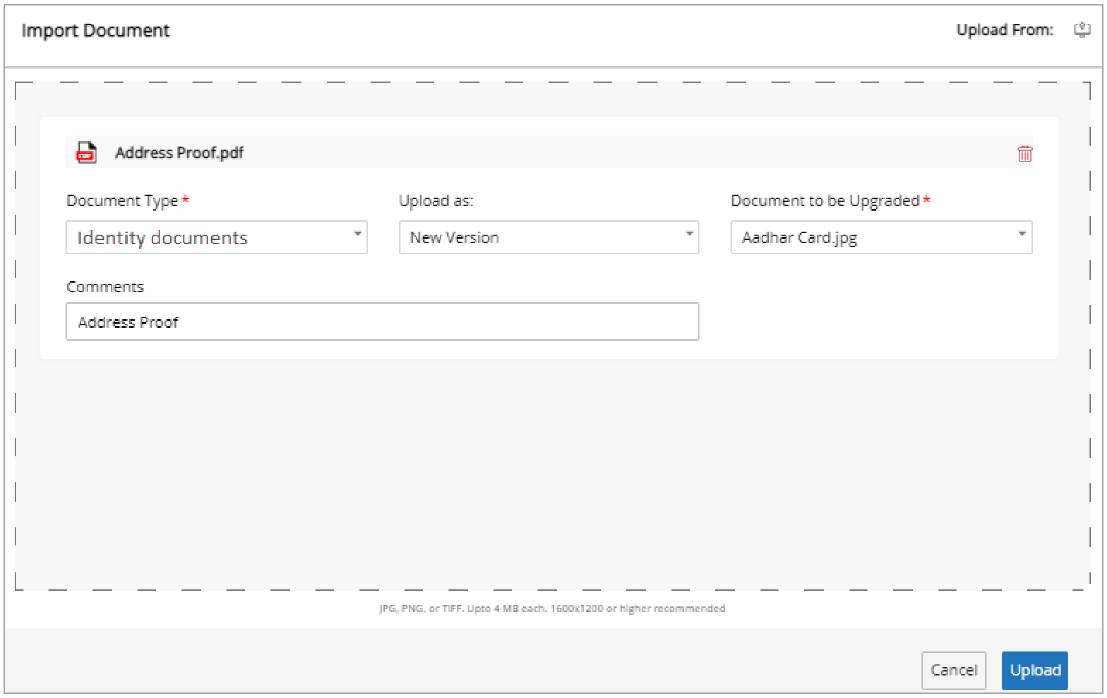
1. On the Workdesk page, click **Document List**. The Upload Documents pane appears displaying the list of defined document types, if any.

   In case, there are no documents uploaded earlier for the opened workitem in Workdesk, then in the *Document view pane,* the icons to upload documents from computer and using the scanner appear. If OmniDocs is integrated, then an additional option to upload documents from OmniDocs appears.

2. Click **Upload Files** to upload a new document or click **Upload** against the defined document type. The Upload Form dialog appears.
3. Click the **From Computer** icon.
4. Select and upload a document from your local machine. The Import Document dialog appears.
5. Specify the following details:

Field	Description
Document Type	From the **Document Type** dropdown list, select a document type.
Upload as	From the **Upload as** dropdown list, select one of the following: • **New** — Select this option to upload a new document. • **New Version** — Select this option to upload a new version of an existing document. • **Overwrite** — Select this option to upload and overwrite the existing document. While uploading a new document, only the New option appears in the Upload as dropdown list.
Document to be Upgraded	Select the document name which you want to upgrade. This option gets disabled if the Upload as option is selected as New.
Comments	Enter a brief description of the document.

6. Click the **Upload From** option to upload more documents, else click **Upload**.



The uploaded document appears under the selected Document Type in the Document List tab.

Related topic(s):

Viewing uploaded document

Uploading a document using scanner

The scanner option in the Workdesk facilitates you to upload a document using a scanner. The scanner option appears if it is configured with the Workdesk page.

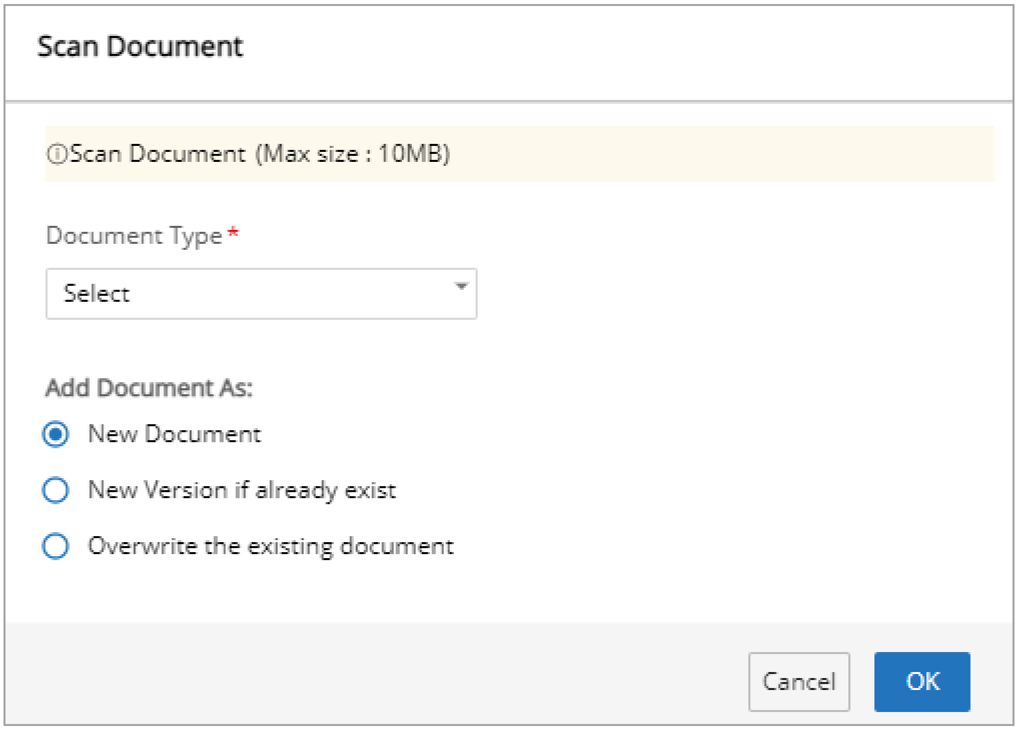
To upload a document using the scanner option, a scanner and its drivers must be installed in your system.

To upload a document using a scanner, perform the following steps:

1. On the Workdesk page, click **Document List**. The Upload Documents pane appears displaying the list of defined document types, if any.
2. Click **Upload Files** to upload a new document or click **Upload** against the defined document type. The Upload Form dialog appears.

It is possible to upload a file with a maximum size of 10 MB.

3. Click the **Scanner** icon. The Scan Document dialog appears.



4. From the **Document Type** dropdown list, select a required option.
5. Under **Add Document As**, select one of the following options:
   - **New Document** — Select this option to scan and upload a new document.
   - **New Version if already exist** — Select this option to scan and upload a new version of an existing document. As you select this option, a dropdown list appears to select an existing document for uploading its newer version.
   - **Overwrite the existing document** — Select this option to scan and overwrite an existing document.
6. Click **OK**. The WebScan page appears.
7. Configure the WebScan settings and scan the required document.
8. Once the document is scanned, save it. The scanned document appears under the selected Document Type in the Document List tab. Here, you can view and perform available operations on the uploaded document.

Related topic(s):

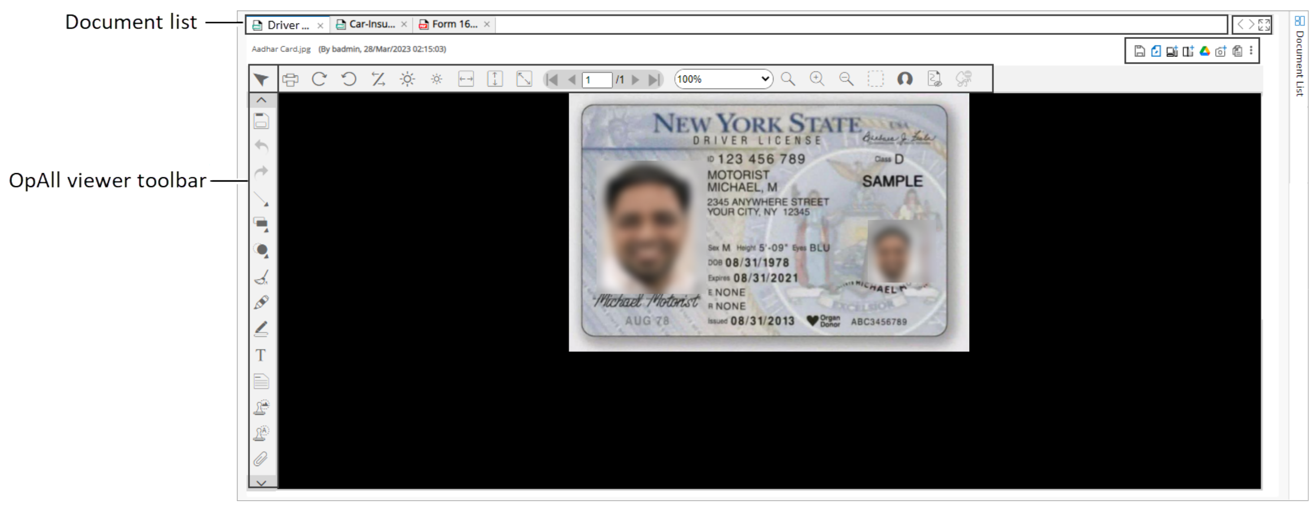
Viewing uploaded document

Viewing uploaded document

The Workdesk allows you to view the uploaded documents for a workitem. The document opens in the OpAll viewer from where you can annotate and save a document.

To view a document, perform the following steps:

1. On the Workdesk page, click the **Document List** tab. The lists of uploaded documents appear under the different document types.
2. Select the required document and then click the **Document List** tab again. The selected document opens in the OpAll viewer.



The following options appear:

Option	Description
OpAll viewer toolbar	This toolbar allows you to annotate or make the required changes on an open document.
Document list	This section lists all opened documents.
Batching icon	In case the list of opened documents is long, then using the batching icon, you can navigate to the required documents available in an open document list.
Expand or Collapse icon	This icon allows you to expand or collapse the document view pane.
Save Transformation	Selecting this icon allows you to save the document along with changes made.

Option	Description
Set as Default	Selecting this icon sets the required document as default.
Import Document	Selecting this icon opens a dialog to upload a document. For procedural details, see the Uploading documents from your local machine section.
Scan Document	Selecting this icon allows you to scan and upload the document using a scanner.
Import from Google Drive	Selecting this icon allows you to import and upload the document from Google Drive.
Import from Camera	Selecting this icon allows you to import and upload the document using your system's camera.
Show/Hide Toolbar	Selecting this icon show or hide the OpAll viewer toolbar.
More Options	Clicking this icon allows you to access the following options: • Checkout or Checkin — Selecting the **Checkout** option allows you to check out the document to work on it offline. As you select the Checkout option, the Check Out Document dialog appears. Here, you can click the download icon to download the current version of a document or click **Undo Checkout** to revoke the checkout operation. Once you updated the checked-out document, you can again upload the updated document by selecting the **Checkin** option. • Delete — Selecting this option deletes the document from the listed documents. • Version(s) — Selecting this option allows you to create a new document version. It also allows you to set any previous version as the latest and add comments. • Download — Selecting this option downloads the document to your local system. For the documents listed under Conversation, only the Version(s) option is available to perform.

Editing a document

Prerequisites:

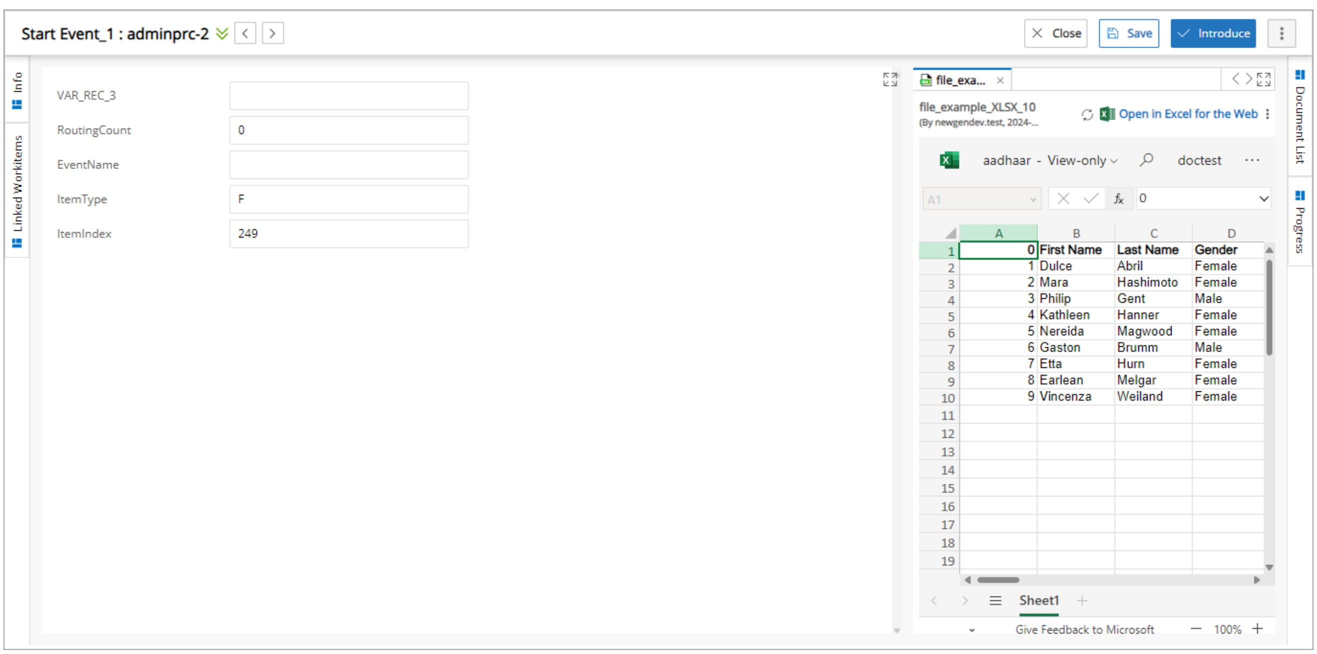
To edit a document online, the Web Application Open Platform Interface (WOPI) must be configured on your server machine. For procedural details, refer to the *Configuring the WOPI MS Office server* section in the *NewgenONE Configuration Guide*.

To edit a document, perform the following steps:

1. On the Workdesk page, click the **Document List** tab. The lists of uploaded documents appear under the different document types.

   - Documents with extensions DOCX, XLSX, and PPTX support both editing and viewing, while documents with extensions DOC, XLS, and PPT are only viewable.
   - Viewing WOPI-supported files in a limited width may result in portions of the document, such as the scrollbar, being hidden or partially obscured.

2. Click the document to open the required document. The document opens.



3. Click **Open in Excel for the Web** to open the document in the web to edit. The document opened in web.

   If the selected document is Word document, it will be **Open in Word for the Web**, and for PowerPoint document, it will be **Open in PowerPoint for the Web**.

4. Make the required modifications.

5. Multiple users with modify content rights can simultaneously edit the same document. Changes made by any user will be visible in real-time to all collaborators. The first user to begin editing becomes the initiator, while others are participants.
   Participants can save their changes by clicking **Redirect to Newgen Link** within the Microsoft application. However, only the initiator has the option to save a new version of the document, which will incorporate the changes made by both the initiator and participants.

   > To use the functionality of simultaneously editing office documents, use parallel distribute gateway in your process.

6. Once the required modifications are done, click **Document Name - Saved** dropdown displayed on the upper-left of the screen
7. Click **Save**. The Save Document dialog appears.
8. Click **Save**. The document gets saved and appears in the user interface.

Downloading a document

To download a document, perform the following steps:

1. On the Workdesk page, click the **Document List** tab. The lists of uploaded documents appear under the different document types.
2. Click the more options icon ⋮ against the required document.
3. Select **Download**. The document gets downloaded into your local system.

You can download multiple documents of the same document type at a time. By selecting the checkboxes against the required documents and then clicking **Download** on the upper-right corner of the Document List tab.

Checking out a document

You can check out a document to work on it offline. Once you worked on the checked-out document, you need to check in the updated document again in Workdesk.

To check out a document, perform the following steps:

1. On the Workdesk page, click the **Document List** tab. The lists of uploaded documents appear under the different document types.
2. Click the more options icon ⋮ against the required document.
3. Select **Checkout**. The Check Out Document dialog box appears.
4. Click the download icon to download and update the checked-out document offline. In case, you want to revoke the Checkout operation, click **Undo Checkout**. Otherwise, click **Cancel**.

Once you update the document, you must check in the updated document in Workdesk.

Related topic(s):

Checking in a document

Checking in a document

You can check in an updated document in a Workdesk with a new version.

To check in a document, perform the following steps:

1. On the Workdesk page, click the **Document List** tab. The lists of uploaded documents appear under the different document types.
2. Click the more options icon ⋮ against a checked-out document.
3. Select **Checkin**. The Check in Document dialog box appears.
4. Select one of the following **Import from** options:
   - **PC** — Select this option to import a document from your system.
   - **Google Drive** — Select this option to import a document from Google drive.
5. Click **Browse file** and select the required document for check in.
6. (Optional) In the **Comments** box, enter a brief description.
7. Click **Check in**. The checked-in document appears in the list of documents.

Deleting a document

To delete a document, perform the following steps:

1. On the Workdesk page, click the **Document List** tab. The lists of uploaded documents appear under the different document types.
2. Click the more options icon ⋮ against the required document.
3. Select **Delete**. The document gets deleted.

You can also delete multiple documents of the same document type at a time. By selecting the checkboxes against the specific documents and then clicking **Delete** on the upper-right corner of the Document List tab.

Document versioning

Whenever the document is checked out and then checked in back into a Workdesk of a workitem, a new version of the document gets created. By default, the latest version of the document gets displayed in the Document List tab. You can set any of the previous document versions as the latest. Also, you can add and modify the comments for any version of a document.

To create a document version, perform the following steps:

1. On the Workdesk page, click the **Document List** tab. The lists of uploaded documents appear under the different document types.
2. Click the more options icon ⋮ against the required document.
3. Select **Version(s)**. The Version(s) dialog appears.
4. Click **Add Version**. The Create Version dialog appears.
5. Specify the comment for the new version.
6. Click **Create**. The new version gets created.

To comment on a specific version of a document, perform the following steps:

1. On the Version(s) dialog of a document, click the **Comments** icon against a specific version of a document. The Version Comments dialog appears.
2. In the **Comments** box, enter a brief description.
3. Click **Modify**. The entered comment appears against the selected document version.

To set any version of a document as the latest, go to the Version(s) dialog and click the **Set As Latest** icon against a specific version of a document.

Recording a conversation

The Workdesk allows you to record and view the conversations for workitems.

To record a conversation, perform the following steps:

1. Open workitems in the Workdesk. The Workdesk page appears.
2. Click the more options icon ⋮ and then click **Operations**.
3. Select **Conversation**. The Conversation dialog appears.
4. In the **Subject** box, enter the subject for the conversation.
5. In the **Comments** box, enter a message that you want to record.
6. (Optional) Select the **Add as different document** checkbox to add a new conversation.

   If you are adding the conversation for the first time, the *Add as different document* checkbox gets enabled by default.

7. Click **Save**. The conversation gets added as a document in *.txt* file format.

Linking or de-linking a workitem

The Linked Workitems tab allows you to view the linked workitems. You can also link more workitems or de-link the linked workitems in this tab.

To link a workitem, perform the following steps:

1. Open a workitem in the Workdesk.
2. Click the **Linked Workitems** tab. A list of linked workitems appears, if available.
3. Click **Link Work Item(s)** (if there is no linked workitem available) or click the link workitem icon ⊕ (if the workitem is already linked). The Advance Search dialog appears.
4. Search the document, for procedural details, see the Advanced search section. The Search Workitem (s) dialog appears displaying the searched results.
5. Select the required workitems to link and then click **Link**. The Link Workitem (s) dialog appears.

> If you select multiple documents to link, then in the Link Workitem (s) dialog box the **Comment on batch** checkbox appears as checked. You can clear the selection of this checkbox to enter comments for each workitem while linking.

6. (Optional) In the **Comment** box, enter a brief description.
7. Click **Link**. The workitems get linked with the select workitem and appear in the Linked Workitems tab.

To de-link a workitem, perform the following steps:

1. On the Linked Workitems tab, click the **Delink** icon. The Delink Workitem (s) dialog appears.
2. (Optional) In the **Comment** box, enter a brief description.
3. Click **Delink**. The workitem gets de-linked and removes from the list of linked workitems.

Working on Tasks

The Tasks tab of the Workdesk page allows you to view and process the tasks. This tab appears only for the Case Workdesks.

The Tasks tab contains the following sub-tabs:

- **My Tasks** — This tab contains the tasks that are assigned to you. Here, you can search, filter, and sort the required tasks.
  To perform an operation on a task, click the more options icon against the required task and select any of the following operations:
  - Mark as Read or Unread
  - Decline
  - Reassign
  - Set Reminder
  - Priority
  - Done
  - Reminder List
- **All Tasks** — This tab contains the list of all the tasks related to the opened workstep. Here, the tasks are categorized as mandatory and optional. The current status of the task appears against it. You can search, filter, and sort the required tasks. You can also add a new task.

To perform an operation on a task, click the more options icon ⋮ against the required task and select any of the following operations:

- **Initiate** — Selecting this operation allows you to initiate a task. For procedural details, see the Initiating a task section.
- **Reassign** — Selecting this operation opens the Task Reassign dialog to specify the details for reassigning the task. For further procedural details, see the Reassigning a task section.
- **Revoke** — Selecting this operation revokes the task. To revoke the task:
  a. Click **Revoke** against the required task. The Revoke Task dialog appears.
  b. In the **Comments** box, enter a brief description.
  c. Click **Revoke** to confirm. The task gets revoked.
- **Make Optional** — Selecting this operation makes the task optional and the task moves to the Optional Task list.
- **Make Mandatory** — Selecting this operation makes the task mandatory and the task moves to the Mandatory Task list.

Adding a new task

You can add a new task in a Case Workdesk based on your requirements.

To add a new task, perform the following steps:

1. On the Case Workdesk, click the **Tasks** tab and select **All Tasks**.
2. Click **Add Task**. The Add Task dialog appears.
3. Click **Create New**, if you want to define new data variables. Otherwise, click **Select a Template** and then select a predefined template from the available list. The Add Task: Create New dialog appears.
4. In the Basic Details tab, specify the following details:

Field	Description
Task Name	Name of the task.
Instructions	Instructions for the task.
Goals	Goal of the task.

Field	Description
Turnaround Time	Expiration of the task. Select **Working days** or **Calendar days** and then specify the expiration in days, hours, and minutes, respectively.
Repeatable	Selecting this option makes the task reusable.
Mandatory	Selecting this option makes the task mandatory.
Mail Notification	Selecting this option allows you to send a notification using an email.

5. In the Expiry Details tab, set the date and time for task expiry as follows:

Field	Description
Expire	Selecting this option allows you to set task expiry using the following fields: • **Expires After** — Allows you to select a condition from the available dropdown list to set expiry. • Select **Working days** or **Calendar days** and then specify the expiration in days, hours, and minutes, respectively. • **Perform Action** — Select one of the following options: ◦ **Reassign** — Click this option and then from the dropdown list, select a required option (Constant, CaseManager, or TaskInitiator) to reassign the task automatically on task expiry. A notification sends automatically to the concerned member on task reassignment, if configured. ◦ **Revoke** — Click this option and then from the dropdown list, select a required option (Constant, CaseManager, or TaskInitiator) to revoke the task automatically on task expiry. A notification sends automatically to the concerned member on task revilement, if configured.
Never Expire	Select this option to ensure that the task does not expire.

6. In the Variable tab, specify the following details:

Fields	Description
Variable Name	Name of the task variable.

Fields	Description
Variable Type	Type of the task variable. The following variable types are available to select from the Variable Type dropdown list: • **Text** • **Integer** • **Date** • **Long** • **Float**
Control Type	Type of the input field for the defined task variable. The following control types are available to select from the Control Type dropdown list: • **Text Box** • **Text Area** • **Combo**
Display Name	Display name of the task variable.

Following are the additional options in the Variable tab:

- To add a new variable, click **+ Add Variable**. Specify variable details as mentioned in the above table.
- To delete an added variable, click the delete icon against it.
- To rearrange a variable sequencing, hold the drag icon = and drop it in the required order.

7. In the Escalation Rules tab, define the escalation rules for a task that triggers on breaching the task deadline. To define an escalation rule:
   a. Click **+ Add Rules**. The Escalate After and Email Template fields appear.
   b. Specify the details based on your requirements.
   c. Click **Add Rule**. The rule gets added and appears in the Escalation Rules tab.

   Following are the additional options in the Escalation Rules tab:

   - To edit an escalation rule, click the edit icon against it and make the required modifications.
   - To delete an escalation rule, click the delete icon against it.
   - To rearrange an escalation rule sequencing, hold the drag icon = and drop it in the required order.
   - To add more escalation rules, click **Add More** and follow the above-mentioned steps.

8. Once all the required details are filled, click **Create Task**. The created task gets added to the list of All Tasks.

Related topic(s):

Working on Tasks

Initiating a task

To initiate a task, perform the following steps:

1. On the Case Workdesk, click the **Tasks** tab and select **All Tasks**.
2. Click **INITIATE** against the required task. The Task Initiation dialog appears.
3. Specify the field details as explained in the Reassigning a task section.
4. In **Completion Time**, specify the task expiry**.**
5. In **Priority**, select the task priority as **Low**, **Medium**, **High**, or **Very High**.
6. Click **Initiate**. The task route to the next workstep based on the defined process.

Related topic(s):

Working on Tasks

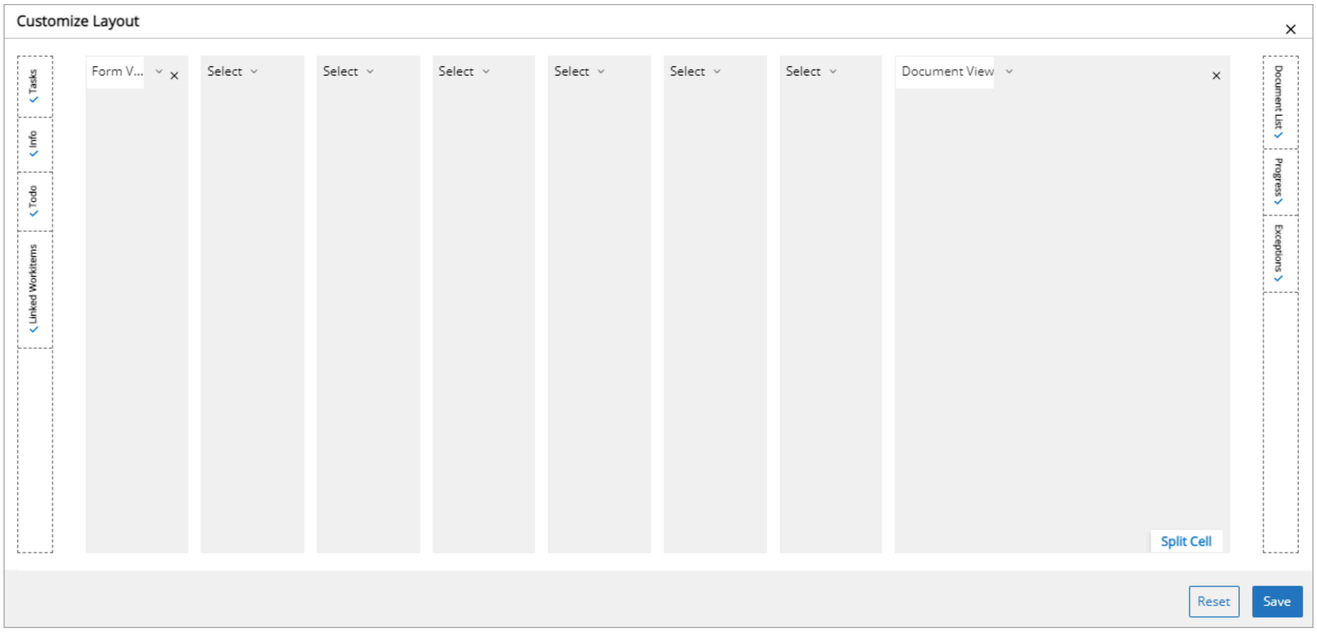
Customizing Workdesk layout

The Workdesk facilitates you to customize or edit your predefined Workdesk layout.

To edit the Workdesk layout, perform the following steps:

1. On the Workdesk page, click the more options icon ⋮ and then select the **Edit Layout** option. The Customize Layout dialog appears. This dialog displays the default layout of a Workdesk that contains the tab list (on the right and left sides) and panes (Form view pane and Document view pane in middle).
2. To disable a tab from a Workdesk, click the respective tab. The tab gets unchecked and does not appear once saved.
3. To rearrange a tab sequencing, hold a tab and drop it in the required order.

4. To divide the Form View or Document View pane into multiple sections, go to the respective pane and then click **Split Cell**.



5. Once the panes are divided into multiple cells, click the **Select** dropdown list and then select a component for each pane.
6. Click **Save** to finalize the customized layout.