NewgenONE

Workspace for Mobile

User Guide

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Disclaimer

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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 for Mobile.

Revision history

Revision date	Description
November 2024	Initial publication

About this guide

This guide provides information about using the NewgenONE Workspace for Mobile graphical user interface (GUI) to perform various tasks related to workitem creation and management on iOS and Android devices. It describes procedural information to use the application and perform each task on the workitem such as initiating workitem, putting workitem on hold, setting reminders, applying filters, and others.

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

- Newgen Internal Doc Portal, if you are a Newgen employee.
- Newgen Partner Portal, if you are a Newgen partner.

Intended audience

This guide is intended for business users and system administrators who oversee performing, monitoring, and managing business case-related activities using the NewgenONE Workspace for Mobile with the underlying iOS and Android operating systems. Business users must know how to perform case-related activities such as case data entry, document upload, task creation, task assignment, and dashboard monitoring.

Ensure that users have sufficient rights and permissions to access NewgenONE Workspace for Mobile and its functionalities.

Related documents

The following documents are related to NewgenONE Workspace for Mobile:

- NewgenONE Overview Guide
- NewgenONE Automation Studio User Guide
- NewgenONE Workspace for Mobile Configuration Guide
- NewgenONE Business Activity Monitor User Guide

Documentation feedback

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

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

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

Introduction

NewgenONE Workspace for Mobile provides an interface for extending the NewgenONE services to handheld devices including iPhone, iPad, and Android devices. It is a workspace to access the dashboard, manage queues, create and initiate workitems, perform workitem related operations, manage assigned cases and tasks, and apply advanced searches on workitems from your handheld devices.

NewgenONE Workspace for Mobile is a cross-platform application available for both Android and iOS users. Depending on your mobile operating system, you can download this application from Apple App Store or Google Play Store.

- Workspace for Mobile is compatible with iOS 13 and later.
- Workspace for Mobile is compatible with Android 10 and later.

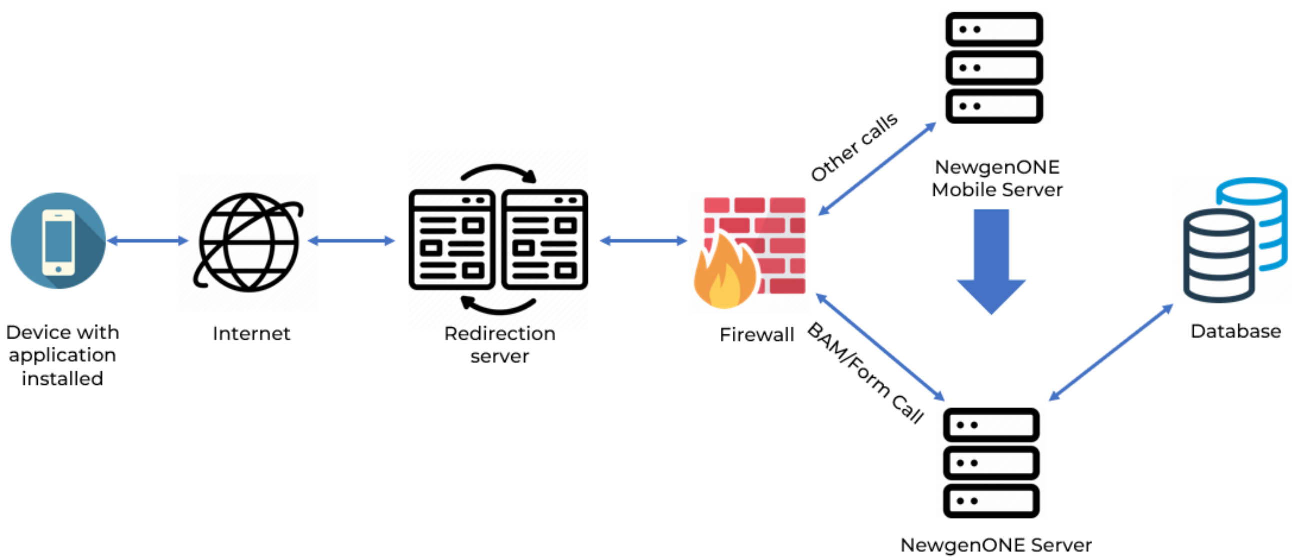
Reference(s)

- Architecture
- Features

Architecture

NewgenONE Workspace for Mobile consists of a variety of components to achieve overall functionality.

NewgenONE Workspace for Mobile Architecture



Reference(s)

Features

Features

The major features of the NewgenONE Workspace for Mobile include the following:

- Manage tab and dashboard settings.
- Display user desktop view with workitem lists in queues.
- Efficiently view and manage your assigned cases.
- Create, save, and manage workitems.
- Apply quick and advanced searches on workitems.

- View the recently accessed workitems for faster navigation.
- Import or view the documents attached to the workitems.
- Set and dismiss reminders for the workitems.
- View the progress, summary, and information for the workitems.
- Raise, respond, reject, and clear exceptions.
- Create relationships between the workitems by linking them.
- View and update to-do items.
- View queues, add, and delete workitems in a queue.
- Support single sign-on authentication mechanism that allows you to sign in using a single set of credentials.
- Support multiple cabinets on the server. This functionality allows you to sign in to the application using any of the registered cabinets. During sign-in, you can also switch between the cabinets on the device.

Getting started

This chapter describes how to get started with NewgenONE Workspace for Mobile.

- Signing in to NewgenONE Workspace for Mobile
- Getting familiar with Home screen
- Creating and initiating workitem

Signing in to NewgenONE Workspace for Mobile

To sign in to NewgenONE Workspace for Mobile, perform the following steps:

1. Open NewgenONE Workspace for Mobile.
2. Enter the NewgenONE server address and tap **Connect**. The Login screen appears.
3. (Optional) To change the locale of Workspace for Mobile, click the locale dropdown and select the required option from the list. You can set the locale either to English or Arabic based on your business requirements. By default, the locale is set to English.
4. Specify the cabinet name, username, and password.

    The Cabinet field automatically picks the cabinet value in case there is only one registered cabinet.

5. Tap **Login**.
    On successful sign-in, a new screen appears prompting you to apply face or fingerprint authentication on the NewgenONE Workspace for Mobile depending on your device's settings.
6. Tap **Allow** or tap **Skip** to avoid biometric detection.
7. Create a 4-digit mPIN for easy sign-in. Enter the mPIN and then confirm it by re-entering.

    You can unlock the NewgenONE Workspace for Mobile using mPIN, face/fingerprint detection, or both configured for your device.

8. Tap **Save and Continue** to proceed further.
   A new screen appears prompting you to unlock the NewgenONE Workspace for Mobile using the saved mPIN, face or fingerprint detection, or both for your device.

Reference(s)

Resetting password

Resetting your password

To reset your forgotten password, perform the following steps:

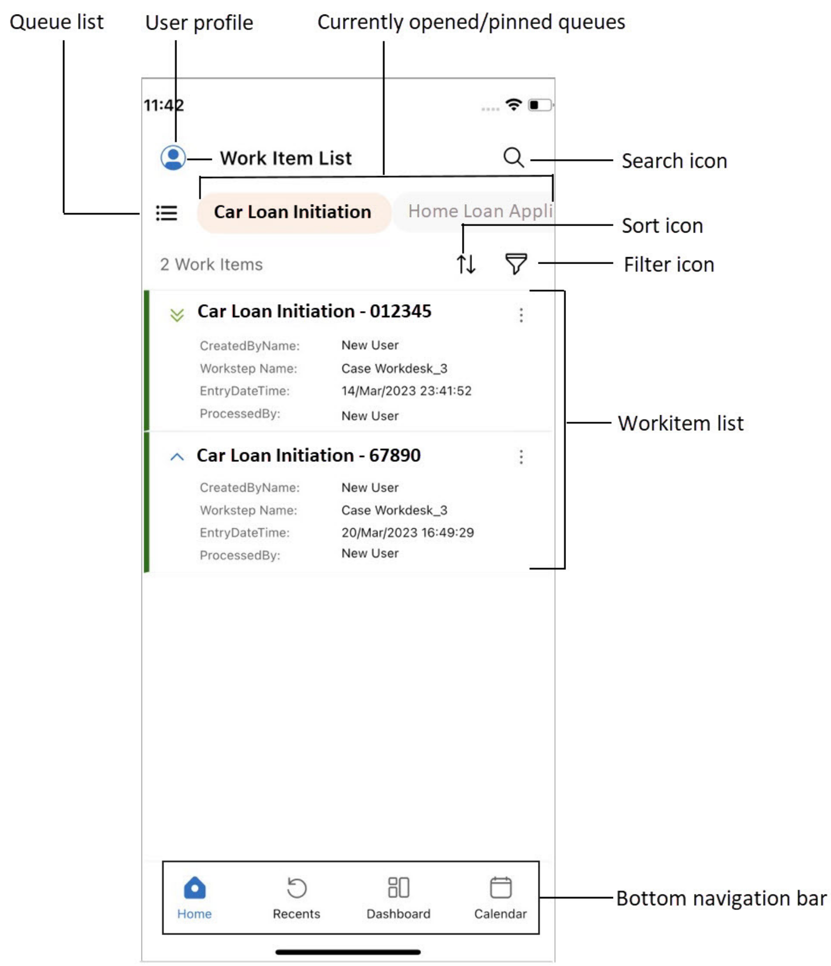
1. Tap the **Forgot Password?** link on the Login screen. The Forgot Password dialog appears.
2. Enter the following details in the corresponding fields:

Field	Description
Cabinet Name	Select a suitable cabinet from the list.
Username	Enter the NewgenONE username.
Email	Enter the email address associated with the username.

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

Getting familiar with home screen

On successful sign-in, the Home screen appears. It lets you view, create, sort, and filter workitems. It also enables you to set reminders, add events, and apply other additional operations on the workitems.



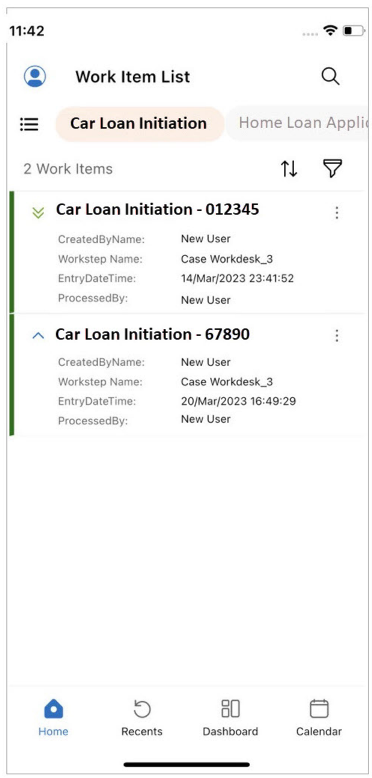
These are the different components of the Home screen:

- Work item list
- Queue list
- Navigation drawer
- Bottom navigation bar

Work item list

The **Work Item List** shows all the workitems present in a particular queue. To look for a specific workitem, type its name in the search box. You can also use quick and advanced search features for faster results.

To organize the workitems in a certain order, apply sorting on the workitem list. Tap the **Filter** icon to view only those workitems that match your criteria. For more information, see Finding workitems.



Reference(s)

- Queue list
- Navigation drawer
- Bottom navigation bar

Queue list

To view the queue list, tap the ≡ icon. On tapping, a list of queues appears assigned or shared with you. Select any queue from the list to view its workitems.

If the queue list is large, tap **View All** to see all the queues. To pin a queue on the Home screen for easier and quicker access, tap the pin icon.

Reference(s)

- Work item list
- Navigation drawer
- Bottom navigation bar

Navigation drawer

The navigation drawer is a sliding left menu that appears when you tap the profile picture on the upper-left corner of the Home screen. Use the navigation drawer for easy navigation between screens.

Following are the important links available in the navigation drawer:

- **My tasks** — It provides a list of tasks assigned to you. You can search, apply filters, and sort to find a particular task in the list.
- **My cases** — It provides a list of cases assigned to you. You can search, apply filters, and sort the list to find a particular case.
- **My workitems** — It provides a list of workitems assigned to you. You can search, apply filters, and sort to find a particular workitem in the list.
- **Reminder List** — It displays a list of workitems you need to accomplish. Any workitem having a reminder for you appears in the list. For more information, see Viewing reminders.
- **Logout** — It lets you sign out of the application.

You can also integrate external applications and pages in the navigation drawer. For this, you need to set the **<CustomLinkFlag>** to "Y" in the *ini.properties* file.

For more information, see *NewgenONE Workspace for Mobile Configuration Guide*.

Reference(s)

- Work item list
- Queue list
- Bottom navigation bar

Bottom navigation bar

The bottom navigation bar consists of multiple tabs, each providing a different set of functionality. By default, the bottom navigation bar consists of Home, Recents, Dashboard, and Calendar tabs.

Reference(s)

- Work item list
- Queue list
- Navigation drawer

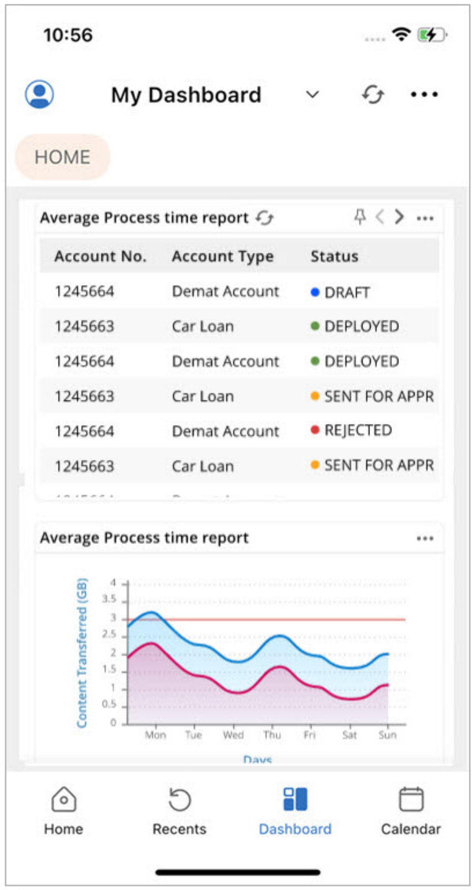
Recents

The Recents tab lists all the recently accessed workitems on NewgenONE Workspace for Mobile. You can navigate through the list and tap to view its summarized information.
To perform various operations on the workitem, tap the ellipsis icon next to the required workitem. For more information on the operations, see Managing workitems.

Dashboard

The Dashboard tab provides a comprehensive overview of your data. This helps to track, analyze, and visualize the key indicators of your data. The configuration of the dashboard in the application is done using the Business Activity Monitor module.

For more information, see *NewgenONE Business Activity Monitor User Guide*.



To view data in the Dashboard tab, tap the dropdown on the top of the screen and select the required dashboard from the list. By default, it shows the data of the home dashboard.

To keep yourself updated with the latest changes in the data, tap the **Refresh** icon. Apart from this, you can add a new tab and specify the home dashboard.

Adding new tab

You can add multiple tabs to the dashboard based on your requirements.

To add a new tab in the dashboard, perform the following steps:

1. Tap the horizontal ellipsis icon ••• on the upper-right corner of the screen and select **Tab Settings**. The Tab Settings dialog appears listing all the available tabs.
2. Tap **New Tab**. The New Tab screen appears.
3. Enter the name of the tab and select the template from the dropdown list.
4. Tap **Add**. The tab gets added.
   To modify the added tab, tap the edit icon next to the required tab and make the necessary changes.

Modifying tab preferences

To specify the home tab in the Dashboard, perform the following steps:

1. Tap the horizontal ellipsis icon ••• on the upper-right corner of the screen and select **Tab Settings**. The Tab Settings dialog appears listing all the available tabs.
2. Select the tab that you want to set as the home tab.
3. Tap **Save Preferences**.

Specifying home dashboard

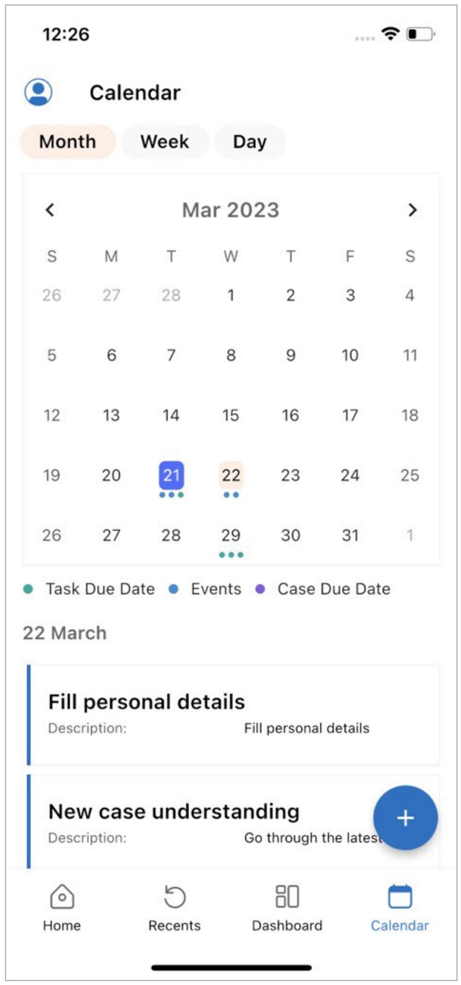
The home dashboard refers to the dashboard that appears by default when you open the Dashboard tab.

To specify the home dashboard, perform the following steps:

1. Tap the horizontal ellipsis icon ••• on the upper-right corner of the screen and select **Manage Dashboard(s)**. The Manage Dashboard(s) dialog appears.
2. Choose the dashboard from the dropdown list you want to set as the home dashboard.
3. Tap **Save**.

Calendar

The Calendar tab helps to keep a track of upcoming deadlines and milestones. When you tap a day in the calendar, it lists the pending tasks, cases, and events, assigned to you for that day. These due dates for tasks, cases, and events are represented by different colors.



The calendar displays the days on a monthly basis, by default. In order to change the default view, tap **Week** or **Day** on top of the screen.

To add an event to the calendar, perform the following steps:

1. Navigate to the **Calendar** tab and tap the create icon . The New Event screen appears.
2. Enter the following details in the corresponding fields:

Field	Description
Event Name	Enter the name for the event.
Event Description	Provide description about the event.
Event Timing	Enable the **All Day Event** toggle if the event lasts for 24 hours or complete day. In this case, specify the Start Date and End Date for the event. On enabling the toggle, the Start Time and End Time options get disabled. Disable the All Day Event toggle if the event lasts for a specified time interval. In this case, specify the Start Date, End Date, Start Time, and End Time for the event.
Add Guests	Choose the guest for the event based on the user name, group, or expertise.

3. Tap **Save**. The event gets added to the calendar.

To modify an event, select that event from the calendar list and tap the edit icon . To remove an event, tap the delete icon .

Creating and initiating workitem

You can create workitems based on the rights assigned to you.

To create and initiate a workitem, perform the following steps:

1. Select an initiation queue from the queue list.
   The selected queue workitems appear.
2. Tap the **Create** button . A new screen appears with the following tabs in the bottom navigation bar. Go through each tab and perform the required action.

Tab	Description
Summary	It allows you to view the workitem information including basic details, raised exceptions, attached documents, linked workitems, added to-do items, and progress. For more information, see Summary.
Form	It allows you to fill in the values in the form. For more information, see Form.
Documents	It lets you add, overwrite, and delete documents of a specified type. It also allows you to maintain document versions. For more information, see Documents.
Exceptions	It enables you to raise, reject, respond, and clear exceptions. For more information, see Exceptions.
More Options	It provides additional operations that you can apply to the workitem.

3. Tap **Save**, and then tap **Initiate**. The workitem gets initiated to the next queue. For more information, see Work item list.

All changes, except for conversations and documents, require the corresponding workitem to save for persistence.

Summary

The Summary tab provides information about the currently selected workitem in the list including its basic information and progress state.

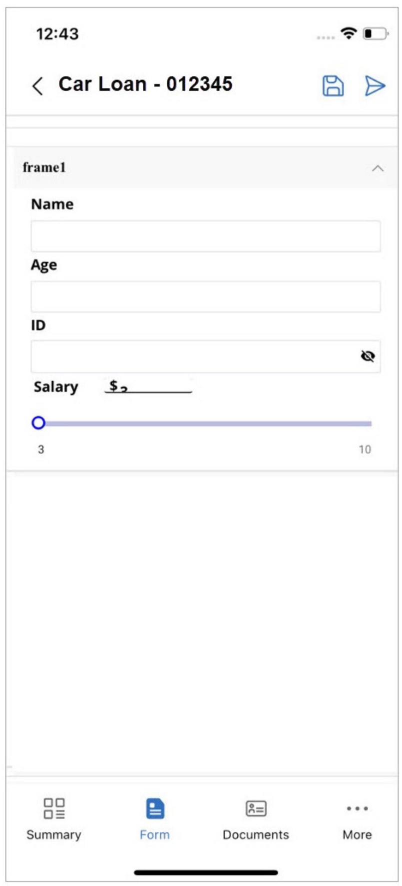
- **Workitem Information** — It includes information such as the workitem registration number, name, priority, and turnaround time.
- **Workitem Progress** — It displays the progress state of the workitem, depicting the stages (worksteps) the workitem has completed.

Apart from this, it also displays four tiles showing the added exceptions, uploaded documents, linked workitems, and associated to-do items for the workitem. You can tap the required tile to add an exception, upload a document, link a workitem, and associate a to-do item.

Form

The Form tab lets you view and input the values in the form for the currently selected workitem. This form is created and designed using the NewgenONEProcess Designer. The form varies depending on the process requirements.

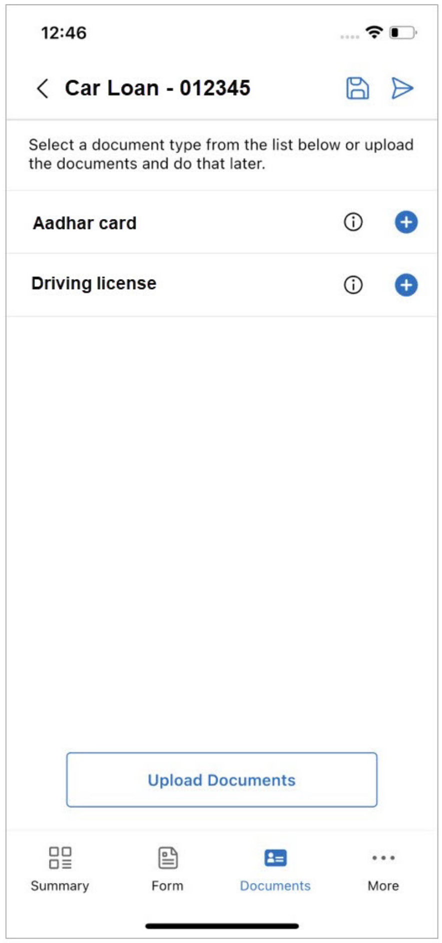
For example, a loan approval form requires details such as the age and name of the person. An employee personal form requires details like the name, ID, address, and gender of the employee.



Documents

There can be chances when you need to attach a document to a workstep necessary for its completion. The types of documents are already defined while designing a process. Here, in the **Documents** tab, you can view, add, overwrite, and delete documents of a particular type. You can also manage document versioning.

For example, a scanning workitem of an account opening process requires documents for identification proof. Therefore, you can add an Aadhaar card, driving license, or passport to the required workitem.



For more information, see Working with documents.

Tasks

The **Tasks** tab lets you view, add, and perform actions on the various tasks defined for the currently opened case. There are two tabs in the Tasks tab.

- **My Task** — It shows the list of tasks assigned to the currently signed-in user for the chosen case.
- **All Tasks** — It shows the list of all the tasks related to the chosen case.

For more information on task creation, see Creating and initiating task.

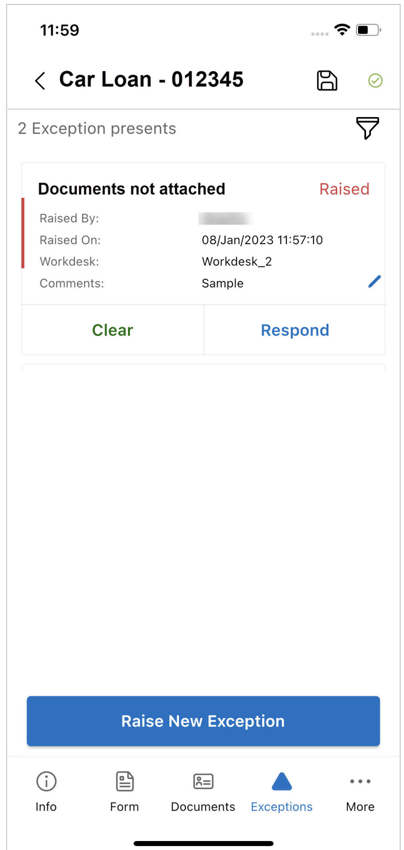
After the successful creation, you can perform the following operations on a task by tapping the corresponding ellipsis icon ⋮ .

Operation	Description
Mark as Done	It allows you to mark a task as completed. This can also be done by swiping left on the task name.
Reassign	It lets you reassign a task to another user.
Revoke	It lets you revoke a task.
Mark as unread	It allows you to mark a task as unread.
Set Priority	It allows to set the priority of a task.
Set Reminder	It lets you set a reminder for a task.

Exceptions

The **Exception** tab lets you view the raised exceptions that you might encounter while working on a workitem. The types of exceptions are defined while designing a process. Additionally, you can respond, clear, or reject an exception.

For example, the loan approval process can contain exceptions of the following types – low image quality, incomplete documents uploaded, and incomplete details.



For more information, see Handling exceptions.

To do(s)

The **To do (s)** tab lets you view, organize, and prioritize tasks effectively. It also enables you to update the values and remarks of a to-do item.

Linked WI

The Linked WI tab lets you view the linked workitems. You can also link and de-link the workitems in this tab.

To link a workitem, perform the following steps:

1. Tao **More** on the bottom navigation drawer and select **Linked WI**. The Linked WI screen appears.
2. Tao **Linked Work Item(s)**.

3. Apply advanced search to find the required workitems, and tap **Search**. To save the search filter, tap **Save and Search**. For more information, see Using advanced search.
   A list of workitems appears.
4. Tap and hold the required workitem in the list. To select multiple workitems, select the remaining one.
5. Tao **Link Work Item(s)**. The Link Work Item(s) dialog appears.
6. *(Optional)* Enter a comment.
   In case you are linking multiple workitems, you can either provide the comment separately for each workitem or tap the **Comment on batch** checkbox to provide a common comment for all the workitems.
7. Tap **Link**.

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

1. Tap **More** on the bottom navigation drawer and select **Linked WI**. The Linked WI screen appears.
2. Tap and hold the required workitem in the list. To select multiple workitems, select the remaining one.
3. Tap **De-Link Work Item(s)**. The De-Link Work Item(s) dialog appears.
4. *(Optional)* Enter a comment.
   In case you are de-linking multiple workitems, you can either provide the comment separately for each workitem or tap the **Comment on batch** checkbox to provide a common comment for all the workitems.
5. Tap **De-Link**

Progress

This tab displays the progress of the workitem. It displays the user who initiated, worked, and completed the workitem along with the date and time details. It also displays the color representation that indicates the Initiated, Completed, Revoked, Declined, Next Activity, Ready, and Waiting Operations.

History

The **History** tab lets you view the history of actions performed on a workitem. It includes details such as the opening time, locked time, and closing time of the workitem. Apart from this, it also provides information on who opened, locked, or closed the workitem. You can also view the data next to each action performed, or export the entire workitem history in .txt, .csv, or .xlsx format.

When you open the History tab, it contains two tabs which are All Activities and the currently selected workitem.

Comments

The **Comments** tab displays a list of comments added to the workitem.

Conversation summary

The **Conversation Summary** tab lets you view the conversation history for the chosen workitem. It also lets you start a new conversation.

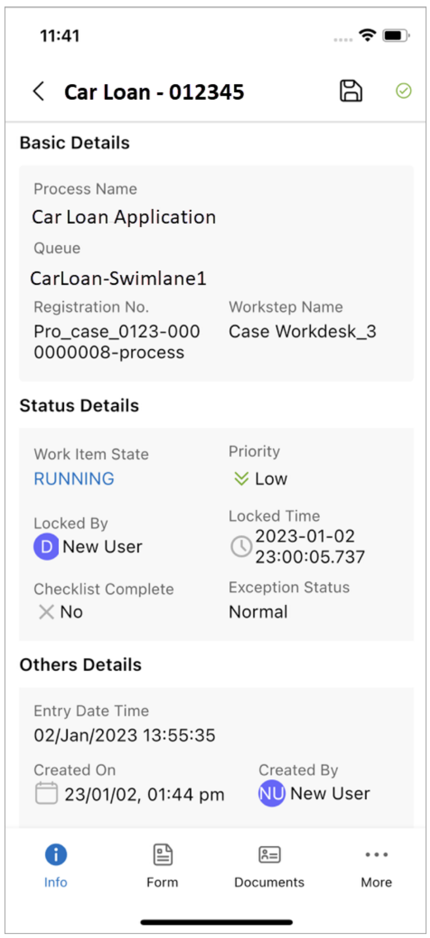
To initiate a new conversation, perform the following steps:

1. Tap **Start New Conversation**. The New Conversation dialog appears.
2. Specify the subject of the conversation.
3. Then, enter a message.
4. Tap **Create**. The conversation gets added to the list.

Info

The Info tab provides information about the currently selected workitem in the list including its basic, status, and other additional details.

- **Basic Details** — Contains information about the process name, associated queue name, process registration number, and workstep name.
- **Status Details** — Contains information about the workitem status, priority, locked time, checklist complete, locked by, and exception status.
- **Other Details** — Contains information about the workitem entry date time, created date, and owner.



Finding workitems

This chapter discusses the various ways to find a particular workitem in the list easily and quickly.

- Using quick search
- Using advanced search
- Sorting
- Applying filter

Using quick search

To use a quick search, perform the following steps:

1. Tap the search icon on the upper-right corner of the workitem list.
2. Tap the dropdown arrow.
3. Select the registration number from the dropdown list.
4. Select the process name from the dropdown list.
5. Tap **Search**.

   The registration number is the default search variable, but additional search variables can be defined through the web portal to suit specific use cases.

Applying advanced search

The advanced search feature allows you to filter workitems based on the process name, queue name, and global queue name. These filters help to conduct more specific searches for better results.

1. Tap the search icon on the upper-right corner of the workitem list.

2. Tap the dropdown arrow and select **Advanced Search**. The Advanced Search screen appears. Here, you can apply a search based on the process, queue, and global queue.
3. If you want to search the workitems based on the process name, go to the **Process** tab and enter the following details:

Field	Description
Process Name	Select the name of the process.
Queue Name	Select the name of the queue.
Registration Number	Select the registration number of the process.
Workitem State	Select the current state of the workitem. It can be in any of the following states: • In History • In Progress • Temporary Hold • Activity Hold • Temporary & Activity Hold
Search with respect to the date of	Select the date criteria that you want to include in the search criteria. You can search with respect to the creation date, introduction date, and completion date.
Business Variables	Select the business variables that you want to include in the search criteria.

If you want to search the workitems based on the queue name, go to the **Queue** tab and enter the following details:

Field	Description
Queue Name	Select the name of the queue.
Process Name	Select the name of the process.
Registration Number	Select the registration number of the process.
Workitem State	Select the current state of the workitem. It can be in any of the following states: • In History • In Progress • Temporary Hold • Activity Hold

Field	Description
	• Temporary & Activity Hold
Business Variables	Select the business variables that you want to include in the search criteria.

If you want to search the workitems based on the global queue name, go to the **Global Queue** tab and enter the following details:

Field	Description
Queue Name	Select the name of the queue.
Workitem State	Select the current state of the workitem. It can be in any of the following states: • In History • In Progress • Temporary Hold • Activity Hold • Temporary & Activity Hold

4. Tap **Search**. The related search results appear.
5. To save the search query, tap **Save**.
   OR,
   To save the search query and continue searching, tap **Save and Search.**

Configurations can be set based on advanced search parameters from the web desktop version.

Sorting

Use the sort icon ⇅ to arrange the workitems in a particular order in the list. You can sort based on recent workitems, oldest first, high to low priority, or low to high priority.

Applying filter

Use the filter icon to view only those workitems that match your filter criteria. You can apply filters based on the queue name, process name, registration number, workitem state, exception status, lock status, and data variables.

To apply a filter, perform the following steps:

1. Tap the filter icon on the upper-right corner of the workitem list. The Filters screen appears. Here, you can use apply the filter criteria based on a new filter or a saved filter.
2. If you want to create a new filter, go to the **New Filter** tab and enter the following details:

Field	Property
Queue Name	Select the name of the queue.
Process Name	Select the name of the process.
Registration Number	Enter the registration number of the process.
Workitem State	Select the current state of the workitem. It can be in any of the following states: • All • In Process • Exited
Priority	Select the priority of the workitem. It can be very low, low, medium, or high.
Exception Status	Select the status of the exception. It can either be normal or in exception.
Lock Status	Select the lock status of the workitem. It can either be yes or no. • If you choose **Yes**, then specify the user who locked the workitem and the assignee. • If you choose **No**, then specify the assignee.
Data Variables	Display various details about the data variables including its created date, created before, introduced on, introduced after, and valid till.

   If you want to use a saved filter, go to the **Saved** tab to view the search results directly. Tap the edit icon to modify the filter criteria.
3. Tap **Apply**. The related search results appear.
4. Tap **Save** to save the filter query.
   OR,
   To save the query and continue filtering, tap **Save and Apply**.

Managing workitems

NewgenONE Workspace for Mobile provides the following ways to manage the workitems:

- Initiating workitem
- Putting workitem on hold
- Referring workitem
- Revoking workitem
- Assigning workitem to myself
- Releasing workitem
- Reassigning workitem
- Setting workitem priority
- Marking workitem as done
- Setting reminders
- Deleting workitem

Initiating workitem

Initiation is the initial step in workitem execution. Use the **Initiate** option to initiate the workitem for execution.

To initiate a workitem, perform the following steps:

1. Tap the ellipsis icon ⋮ next to the workitem and then select **Initiate**. The Initiate Work Item dialog appears.
2. Tap **Initiate**. The workitem gets initiated.

Putting workitem on hold

You can put a workitem on hold and later resume working on it.

To put a workitem on hold, perform the following steps:

1. Tap the ellipsis icon ⋮ next to the workitem. The Hold Work Item dialog appears.
2. Enter the following details in the corresponding fields:

Field	Description
Hold Mode	Select the hold mode you want to apply to the workitem. A workitem can either be put on temporary hold or activity hold.
Comments	Enter any additional information about the workitem.

3. Tap **Hold**.

Referring workitem

To refer a workitem to another user, perform the following steps:

1. Tap the ellipsis icon ⋮ next to the workitem, and then select **Refer**. The Refer Work Item dialog appears.
2. Enter the following details in the corresponding fields:

Field	Description
Refer To	Select the user to whom you want to refer to the selected workitem.
Comments	Enter additional information about the workitem if any

3. Tap **Refer**.

Revoking workitem

When you refer a workitem to another user, it gets displayed in your My Queue in read-only mode. However, if you wish to revert this operation, revoke the workitem.

To revoke a workitem, perform the following steps:

1. Tap the ellipsis icon ⋮ next to the workitem. The Revoke Work Item dialog appears.
2. Enter the comment describing why you want to revoke the workitem.
3. Tap **Revoke**.

Assigning workitem to yourself

The **Assign to Me** option lets you lock a workitem in the queue. It prevents the workitems from being shared with other users.

To lock a workitem, tap the ellipsis icon ⋮ next to it and select **Assign to Me**. The workitem is now assigned to you and gets locked for other users to access.

Releasing workitem

The **Release** option lets you release a workitem, which is either locked by you or assigned to you.

To release a workitem, tap the ellipsis icon ⋮ next to the required workitem, and select **Release**.

Reassigning workitem

Reassign to change the assignee of the workitem.

To reassign a workitem, perform the following steps:

1. Click the ellipsis icon ⋮ next to the workitem and select **Reassign**. The Reassign Work Item dialog appears.
2. Enter the username to whom you want to assign the workitem.
3. Add a comment to provide a note.
4. Then, click **Reassign**.

Setting priority

The **Set Priority** option enables you to specify a priority for a workitem. Prioritizing helps to identify the important tasks that require your attention. You can set the priority of a workitem to Low, Medium, High, or Very High.

To set the workitem priority, perform the following steps:

1. Tap the ellipsis icon ⋮ next to the workitem and then select **Set Priority**. The Set Priority dialog appears.
2. Select the priority to Low, Medium, High, or Very High.
3. Tap **Save** to apply the changes.

Marking workitem as done

Mark a workitem as done when it gets completed at your end. It implies, the workitem has been completed by the assigned user at the workstep level, and is ready to be processed to the next queue.

Setting reminder

To set a reminder for a workitem, perform the following steps:

1. Tap the ellipsis icon ⋮ next to the workitem. The Set Reminder dialog appears.
2. Enter the following details in the corresponding fields:

Field	Description
Set For	Select the name fo the assignee to whom you want to set the reminder. It can be set to myself, user(s), or group.
Remind On	Choose whether you want to send the reminder immediately or later at a specified time.
Comments	Add additional information about the reminder if any.

3. Tap **Save**.
   The reminder gets added to the Reminder List.

Deleting workitem

The **Delete** option lets you remove unnecessary workitems from a queue. After deleting a workitem, you cannot recover it.

To delete a workitem, perform the following steps:

1. Tap the ellipsis icon ⋮ next to the workitem, and then select **Delete**. The Delete dialog appears.
2. Tap **Delete**. The workitem gets deleted permanently.

Working with documents

NewgenONE Workspace for Mobile allows you to perform the following operations on the documents:

- Uploading document
- Overwriting document
- View document version history
- Deleting document

The document types are defined while designing a process.

Uploading document

To add document(s) to a workitem, perform the following steps:

1. Tap **Add Documents** on the Documents tab. This button is visible when there are no documents attached to the workitem.
2. Select a document type from the list and tap the add button next to it. Alternatively, tap **Upload Documents** present at the bottom of the screen.
3. Choose the documents you want to upload from the camera, gallery, or files.
    - If you choose the **Camera** option, capture your document's image using the device camera and upload it as a .pdf or .jpeg file.
    - If you choose the **Gallery** option, then choose an image from your gallery. You can also choose multiple images and upload them as different document types.
    - If you choose the **Files** option, navigate to the **Recents** or **Shared** tab to select any recent or shared file(s). Go to the **Browse** tab to search for the document on your device. You can also choose multiple documents and upload them as different document types.
4. Tap **Open**. A new screen appears.

5. Enter the following details in the corresponding fields:

Field	Description
Document Name	Enter the name of document.
Document Type	Select a suitable type for the document. These types are defined at the time of process creation.
Document Option	Choose what type of operation you want to apply on the document. It can be any of the following: • **New Document** — Saves the uploaded document as a new document. • **New Version** — Saves the document as a new version of an already uploaded document. • **Overwrite** — Replaces an existing document with the uploaded document. Options such as New Version and Overwrite do not appear when you upload a document of a specific type for the first time.
Comment	Provide additional description about the document if any.

6. Tap **Upload**. On successful upload, the Documents uploaded successfully dialog appears.
7. Tap **Ok** and then select **Save**.
   The document gets added under the selected document type. The following table describes the different operations you can perform on the uploaded document.

Operation	Description
Info	Provides information about the uploaded document including its name, size, creation date, owner, and comment.
Share	Lets you share the uploaded document using email, messages, or other applications.
Download	Allows you to store the uploaded document on your device.
Edit Properties	Allows you to modify the added comments to documents. For procedural steps, see Modifying document comment.
Document Version	Provides details about the different versions of the uploaded document. For more information, see Overwriting document.

Reference(s)

- Overwriting document
- View document version history
- Modifying document comment
- Deleting document

Overwriting document

Overwriting allows you to replace an existing uploaded document with a new document. For procedural details, see Uploading document.

Reference(s)

- View document version history
- Modifying document comment
- Deleting document

Viewing document version history

Document versioning keeps a track of all the changes applied to the document. For procedural details, see Uploading document.

To fetch the document version details, tap the ellipsis icon ⋮ next to the desired document and select **Document Versions**. In case you want to perform additional operations on a particular document version, tap its corresponding ellipsis icon ⋮ and select any of the following options:

Option	Description
Edit Comments	Lets you modify the existing comment.
Download	Allows you to store the document on your device.

Option	Description
Set as latest	Lets you set the current document as the latest document version. This option does not appear in the case of a single document version.
Delete	Allows you to remove the current document version. This option does not appear in the case of a single version of the document.

Reference(s)

- Modifying document comment
- Deleting document

Modifying document comment

Adding comments helps to keep a track of changes you made while uploading documents.

To modify a comment, perform the following steps:

1. After selecting a workitem from the list, tap **Documents** on the bottom navigation bar. A list of uploaded documents appears.
2. Tap the ellipsis icon ⋮ next to the document, and then select **Edit Properties**. The Edit Properties dialog appears.
3. Update the comment, and then tap **Save**.
   The comment gets updated.

Deleting document

To delete a document, perform the following steps:

1. Select a workitem from the workitem list.
2. Select **Documents** from the bottom navigation bar. A list of documents of the specified type appears.

3. Tap the ellipsis icon ⋮ next to the document, and then tap **Delete**. The Delete dialog appears.
4. Tap **Yes, Delete** to confirm.

Handling exceptions

NewgenONE Workspace for Mobile provides ways to handle exceptions:

- Raising exception
- Responding to exception
- Rejecting exception
- Clearing exception
- Modifying exception comments
- Filtering exceptions

The exception categories and types are defined while designing a process.

Raising exception

To raise an exception for a workitem, perform the following steps:

1. Select a workitem from the workitem list.
2. Select **Exceptions** from the bottom navigation bar, and then tap **Raise New Exception**. The Raise New Exception dialog appears.
3. Enter the following details in the dialog:

Field	Description
Exception Category	Select a suitable category for the exception.
Exception Type	Enter the type of the exception.
Comments	Provide additional information about the exception.

4. Tap **Raise** to save the exception as a draft. The exception is now visible under the Exceptions tab but will not be implemented with the workitem.
5. Tap **Commit** to raise the exception. The exception is now applied to the workitem.

Ensure to have sufficient rights to raise an exception. In case you do not have sufficient rights, the **Raise New Exception** button does not appear.

Reference(s)

- Responding to exception
- Rejecting exception
- Clearing exception
- Modifying exception comments
- Filtering exceptions

Responding to exception

To respond to a raised exception, perform the following steps:

1. Select a workitem from the workitem list.
2. Choose **Exceptions** from the bottom navigation bar. A list of raised exceptions appears.
3. Tap **Respond** next to the desired exception. The Respond Exception dialog appears.
4. Enter a comment.
5. Tap **Save** to view the added comment
6. Tap **Respond**.

Reference(s)

- Rejecting exception
- Clearing exception
- Modifying exception comments
- Filtering exceptions

Rejecting exception

To reject a raised exception, perform the following steps:

1. Select a workitem from the workitem list.

2. Choose **Exceptions** from the bottom navigation bar. A list of raised exceptions appears.
3. Tap **Reject** next to the desired exception. The Reject Exception dialog appears.
4. Enter a comment.
5. Tap **Save** to view the added comment
6. Tap **Reject**.

Reference(s)

- Clearing exception
- Modifying exception comments
- Filtering exceptions

Clearing exception

To clear a raised exception, perform the following steps:

1. Select a workitem from the workitem list.
2. Choose **Exceptions** from the bottom navigation bar. A list of raised exceptions appears.
3. Tap **Clear** next to the desired exception. The Clear Exception dialog appears.
4. Enter a comment.
5. Tap **Save** to view the added comment
6. Tap **Clear**.

Reference(s)

- Modifying exception comments
- Filtering exceptions

Modifying exception comments

Adding comments helps to keep a track of changes you made while raising, responding, rejecting, or clearing exceptions.

To modify a comment, perform the following steps:

1. Select a workitem from the workitem list.
2. Select **Exceptions** from the bottom navigation bar. A list of raised exceptions appears.
3. Tap the edit icon next to the required exception. The Modify Comment dialog appears.
4. Update the comment, and then tap **Save**.
   The comment gets updated.

Reference(s)

- Modifying exception comments
- Filtering exceptions

Filtering exceptions

Apply filters to temporarily hide the exceptions in the list that do not match your defined criteria. By filtering exceptions, you can find a particular exception quickly.

Tap the **Filter** icon on the upper-right corner of the screen, and then select the filter criteria. The filter criteria can be applied on the basis of the exception status or group. Following are the different criteria based on which you can apply the filter.

- All
- In Drafts
- Raised
- Responded
- Rejected
- Cleared
- Group By Category

Tap **Apply** to see the filtered list of exceptions.

Creating and initiating task

To create and initiate a task, perform the following steps:

1. Tap the **Tasks** tab on the bottom navigation bar.
2. Navigate to the **All Tasks** tab and tap the **Create** icon . The Add New Task dialog appears.
3. Choose whether you want to create a new task from scratch or use a template. The Task Creation screen appears.
4. Enter the following details in the corresponding fields:

Field	Description
Task Name	Enter the name of the task.
Instructions	Enter detailed information on how to perform the task.
Goals	Set the aim of the task.
Turnaround Time	Specify the time span to complete the task.
Repeatable	Indicates whether the task is repeatable.
Mandatory	Indicates whether the task is compulsory to perform.
Mail Notification	Indicates whether to send mail notifications for the task.
Expiry Details	Set the expiration date and time of the task. It can either be set to **Never Expire** or **Expire**.
Expire After	If you chose Expire in the above field, specify the date and time details here.
Perform Action	Specify the action that needs to be revoked or reassigned to another user.

5. Navigate to the **Variables** tab. Here, you can define new variables for the task. To create a new variable, perform the following steps:
   a. Tap **Define New Variable**.
   b. Enter the name of the variable.
   c. Set the control type of the variable.

   d. Specify the data type of variable.
   e. Input the display name of the variable.
   f. Tap **Add**. The variable gets added to the list.
   g. *(Optional)* To define more variables, tap **Add More**.
6. Navigate to the **Escalation Rules** tab. Here, you can define new rules for the task. To create a new escalation rule, perform the following steps:
   a. Tap **Define New Rule**.
   b. Specify the time to escalate the task.
   c. Specify the sender, receiver, and priority for the mail notification.
   d. Specify the subject and variable for the mail notification.
   e. Specify the body for the mail notification.
   f. Tap **Add**. The rule gets added to the list.
   g. *(Optional)* To define more rules, tap **Add More**.
7. Tap **Create Task**. The task gets created.
8. Tap **Initiate** next to the task. The Task Initiation screen appears.
9. Enter the following details in the Assignment tab of the screen:

Field	Description
Instruction	Enter detailed information on how to perform the task.
Goal	Set the aim of the task.
Assign To	Select the name of the assignee to whom you want to assign the task.
Completion Time	Set the time required to complete the task.
Priority	Set the priority of the task. It can be low, medium, high, and very high.

10. Navigate to the **Rights** tab of the screen, and enter the following details:

Right	Description
General Rights	Indicates the general rights of the assignee.
Form Rights	Indicates the assignee rights on the form.
Exception Rights	Indicates the assignee rights on the exceptions.
Document Rights	Indicates the assignee rights on the documents.

11. Navigate to the **Variables** tab of the screen. Set the required values against the variable name.
12. Tap **Initiate**. The task gets initiated.

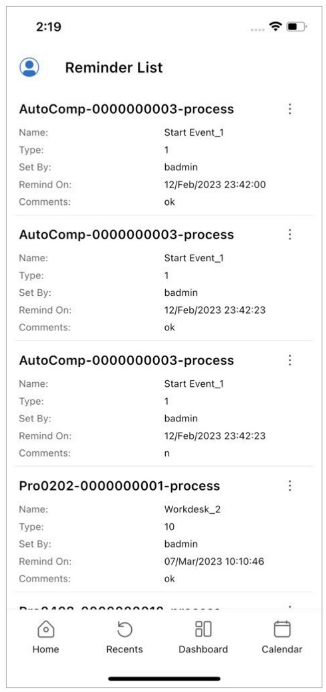
Customizing bottom navigation bar

NewgenONE Workspace for Mobile allows you to customize the bottom navigation bar for a workitem by simply dragging and dropping the items using the **More** button.

To remove an item from the bottom navigation bar, tap the minus icon next to that item.

Viewing reminders

The reminder list reminds you about the workitems that require your attention. These are typically those workitems for which you have added a reminder for yourself or the ones assigned to you. This list displays the workitem name, workitem type, user who set the reminder, reminder date and time, and comments.



To view the details of a workitem in a list, tap the ellipsis icon next to the required workitem and select **Open Work Item**. The Summary tab appears and displays information about the workitem.

To remove a reminder from a workitem, tap the ellipsis icon next to the required workitem and select **Dismiss Reminder**.