NewgenONE OmniOMS

Admin Workspace

User Guide

Version: 12.0

Disclaimer

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Contents

Preface

This section provides information about the revision history, about this guide, details on the intended audience, related documentation and documentation feedback for this guide.

Revision history

Revision date	Description
October 2024	Initial publication

About this guide

This guide provides information on the features of the NewgenONE OmniOMS Admin Workspace for the configuration, maintenance, and development of jobs.

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

The guide is intended for system administrators, developers, and other users seeking information on how to configure, maintain, and develop jobs using the NewgenONE OmniOMS Admin Workspace. The reader needs to be comfortable with computer terminology.

Related documents

Following documents provide additional information about NewgenONE OmniOMS Admin Workspace:

- NewgenONE OmniOMS Release Notes
- NewgenONE OmniOMS Composition Designer User Guide
- NewgenONE OmniOMS Communication Designer User Guide
- NewgenONE OmniOMS Migration Guide
- NewgenONE OmniOMS Administration Guide
- NewgenONE OmniOMS Developer Guide

Documentation feedback

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

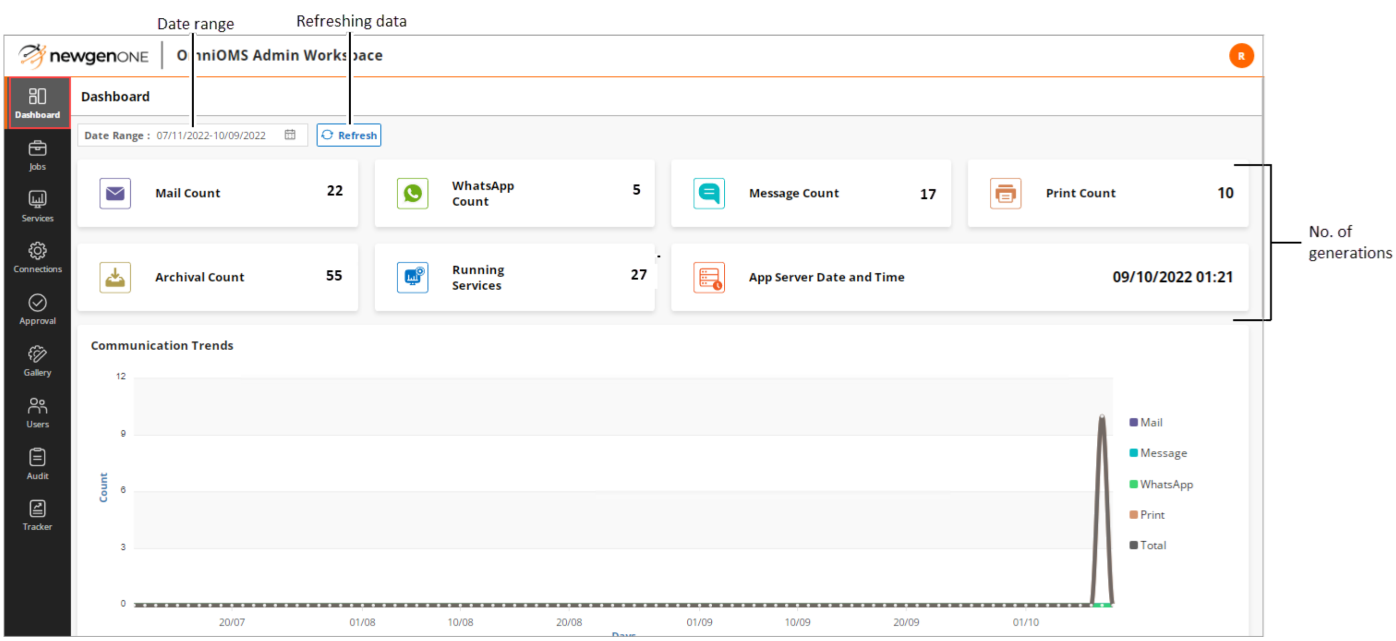
To help capture your feedback effectively, share the following information in your email:

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

Introduction to Admin Workspace

OMS (Output Management System) deal with output generation and distribution. It involves fetching data from databases and distributing the fetched data using various services such as email, print, and PDF. To complete this job successfully, the system needs a console that allows you to perform the necessary administrative functions to make the job programmed and automatic which helps in bringing efficient and effective output.

OmniOMS Admin Workspace caters to this requirement by providing a single administrative console, that allows you to manage users, products, and services. It allows the assigning of rights to the users to operate various products to deliver effective services.



Admin Workspace allows you to perform the following functions:

- User Management
- Services
- Gallery Dynamic Content
- Tracker

- Audit
- History
- Approval
- Job Management – Schedules and Queues
- Workflows
- Letter Generation
- Contract Output Generation

Functions of OmniOMS Admin Workspace

Upon approval of the output design, it is sent for generation. It is mandatory to obtain the necessary approvals from the concerned authorities before generating output. Users are assigned the rights to approve the product for generating output. Using OmniOMS Admin Workspace, users, products, and rights can be managed.

- User Management allows the creation of user and user groups for the Composition Designer, Admin Workspace, and Communication Designer modules. It also allows setting user privileges and associating users to a user group as per roles.
- The Admin Workspace controls and manages jobs configured in Composition Designer. Schedule group jobs that must run according to a specific schedule. A schedule is a group of jobs that can be print jobs, email jobs, and so on.
- Jobs Management allows you to schedule and monitor the jobs. You can create Queues that can be priority-based, or date-time based that is FIFO. Jobs linked to Queues and services; such it runs on queues to service jobs. Once the Queues are in place, you can configure new schedules or modify existing schedules. You must set recurring schedule (daily, weekly, or monthly) along with end date or specify end after a specific number of occurrences. You can associate jobs and their queues in a schedule that get executed as per the recurrence configured. After creating schedules, you must execute schedules under the Jobs tabs **>** Execute. All due schedules appear under Jobs **>** Execution. You can select any due schedule to start data processing. You can generate samples from the processed job and send them for approval.
- The approval section allows approver users to view pending jobs for sample approval. Received tab displays all the jobs waiting for approval by the approver. Sent tab displays the jobs sent by the user for approval to other approvers. Jobs **>** Execute displays the rejected jobs. While Jobs **>** Monitor displays all the approved Jobs.

- The Audit Trail feature allows the user to view logs of actions performed by users specifically in the Composition Designer and Admin Workspace modules. These logs can be accessed from the Admin Workspace module itself.
- The Gallery (Dynamic Content) feature allows you to change the dynamic content that has been set up in the Composition Designer, such as promotional offers, from the Admin Workspace without needing to make any design changes at the Composition Designer level.
- Contract Output Generation feature allows you to approve, reject, or send the contract for approval.
- Tracker feature allows to configure tracking server for mail, message, and WhatsApp.

Accessing Admin Workspace

This chapter describes how to access the NewgenONE Admin Workspace using a Web browser.

To access the NewgenONE OmniOMS Admin Workspace, follow the below steps:

1. Launch a Web browser.
2. In the address bar, enter the OmniOMS Admin Workspace URL in the following format:

Condition	URL format
General	*http://<domain or IP>:<Port>/OMSAdminConsole* Here, *<IP>* is the IP address of the machine where the application is running and *<Port>* is the port number of the machine where the OmniOMS Admin Workspace is registered. For example: • Using a domain name: *https://sample.docker.com/OMSAdminConsole* • Using an IP address: *https://19x.16x.2xx.4xx:8080/OMSAdminConsole*
If Single sign-on (SSO) is enabled	*https://<IP>:<Port>/newgensso/OMSAdminConsole* Here, *<IP>* is the IP address of the machine where the application is running and *<Port>* is the port number of the machine where the OmniOMS Admin Workspace is registered. For example: • Using a domain name: *https://sample.docker.com/newgensso/OMSAdminConsole* • Using an IP address: *https://19x.16x.2xx.4xx:8080/newgensso/OMSAdminConsole*

Condition	URL format
If multi-tenancy is enabled that means multiple cabinets are hosted on a single machine and you want to sign in using your unique cabinet. To enable this functionality set the *MultiTenancy* parameter value as *Y* in the *OMSAdminConfig.ini* file located in your application server directory. For more information, refer to the *NewgenONE OmniOMS 12.0 Administration Guide.*	*http://<IP>:<Port>/OMSAdminConsole/#/login?cabinetname=<name of the cabinet>* Here, *<IP>* is the IP address of the machine where the application is running and *<Port>* is the port number of the machine where the OmniOMS Admin Workspace is registered. For example: • Using a domain name: *https://sample.docker.com/OMSAdminConsole/#/login?cabinetname=sample26cabinet* • Using an IP address: *https://19x.16x.3xx.4xx:8080/OMSAdminConsole/#/login?cabinetname=sample26cabinet*

The sign-in page appears.

3. Enter your username and password.
4. From the cabinet dropdown, select the required cabinet.

> The cabinet dropdown does not appear in case of multi-tenancy is enabled and you must pass the cabinet name in the URL, see *step 2*.

5. (Optional) Select the **Remember me** checkbox to allow the system to store your username and cabinet for future sessions.
6. Click **Login**. The NewgenONE OmniOMS Admin Workspace home page appears. If Two Factor Authentication is enabled, the Two Step Authentication page appears. To proceed with signing in, follow the below steps:
   a. Enter the One Time Password (OTP) sent to your registered email ID or mobile number.

   > - If there is no email ID associated with your user account, an error message stating, "Email ID is not associated with the user" appears.
   > - Use the **Didn't get OTP?** option to resend an OTP to your registered email ID or mobile number. This option gets enabled when the OTP validation time expires.

   b. Click **Verify**. Upon successful verification of the OTP, the NewgenONE Admin Workspace home page appears.

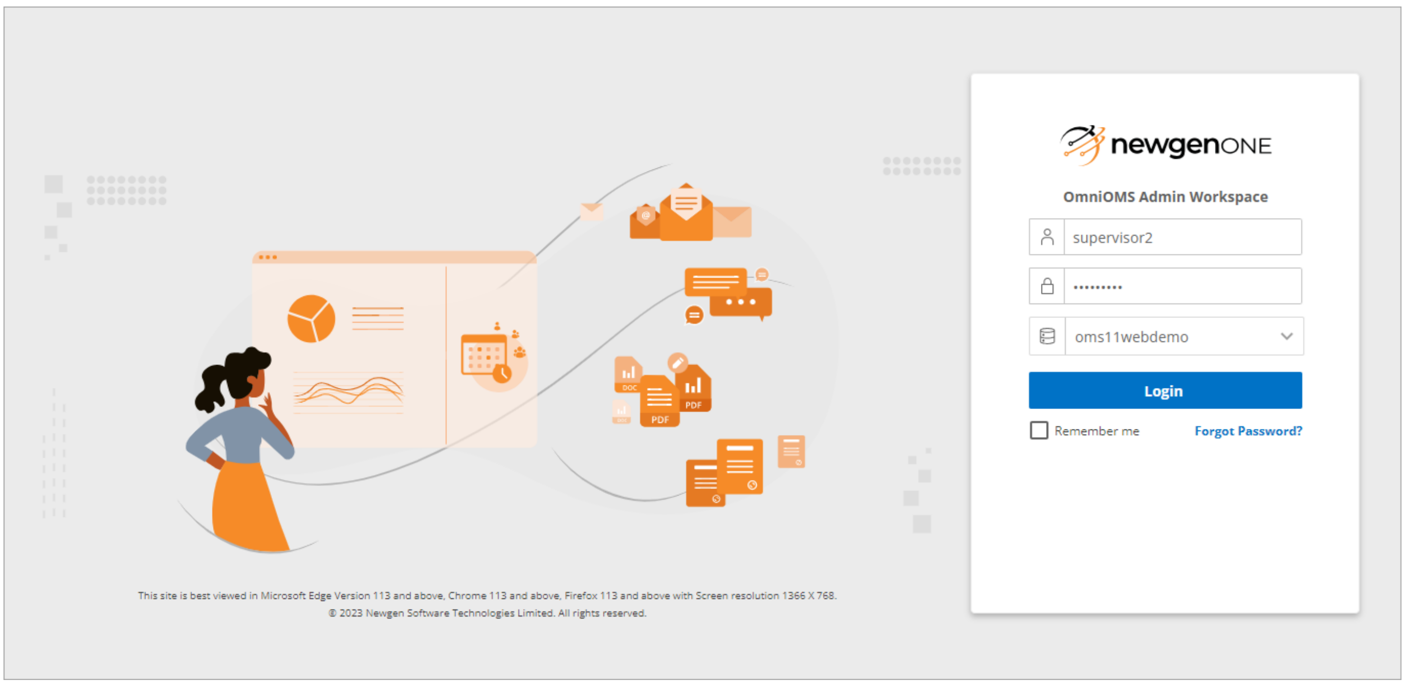
Resetting password

Use the Forgot Password option to reset your password in case you have forgotten it.

To reset your password, follow the below steps:

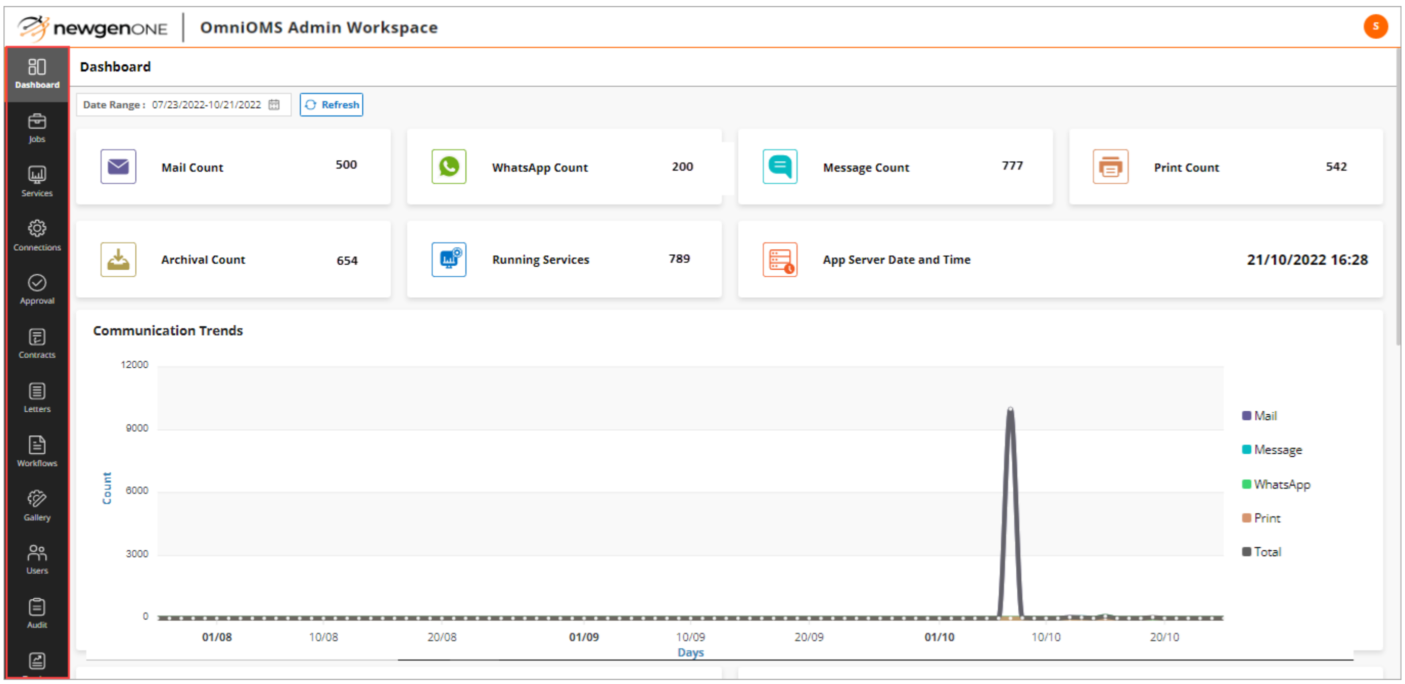
1. Click **Forgot Password?** The Forgot Password page appears.
2. Enter the **Username** and **Email** used during the registration.
3. Click **Get Reset Link**. System sends an email containing the link to reset password on the registered email.ID.

Use the **Back to Login** option to go back to the login page without performing password reset.



Menu bar

The menu bar of the OmniOMS Admin Workspace appears on the left side of the page. It allows you to navigate between different tabs of the console.



The following tabs are available in the menu bar:

- Dashboard
- Jobs
- Services
- Connections
- Approval
- Contracts
- Letters
- Workflows
- Gallery
- Users
- Audit
- Tracker

Dashboard tab

This chapter provides information on the Dashboard tab present in OmniOMS Admin Workspace. The tab appears by default.

The dashboard provides an insight into the OmniOMS system at-a-glance. A collection of widgets gives you an overview of the operational usage and metrics. With the dashboard, you can view number of generations that happened in the OmniOMS system.

Following table lists the options and its related information present in the Dashboard tab:

Field	Description
Date range	Click the **Date Range** icon to select the range for which you want to view the operational usage and metrics. Select: • Last 7 days • Last 14 days • Last 30 days • **Custom** — to select a specific date range
Refreshing data	Use the **Refresh** option to refresh and get the updated metrics.
No. of generations	Displays the number of generations that occurred in OmniOMS: • **Mail Count** — Number of emails generated. • **WhatsApp Count** — Number of WhatsApp communications generated. • **Message Count** — Number of messages generated. • **Print Count** — Number of PDFs generated. • **Archival Count** — Number of communications archived. • **Running Services** — Number of services running. • **App Server Date and Time** — Date and time of login into the app server.

The Dashboard tab displays the following trends:

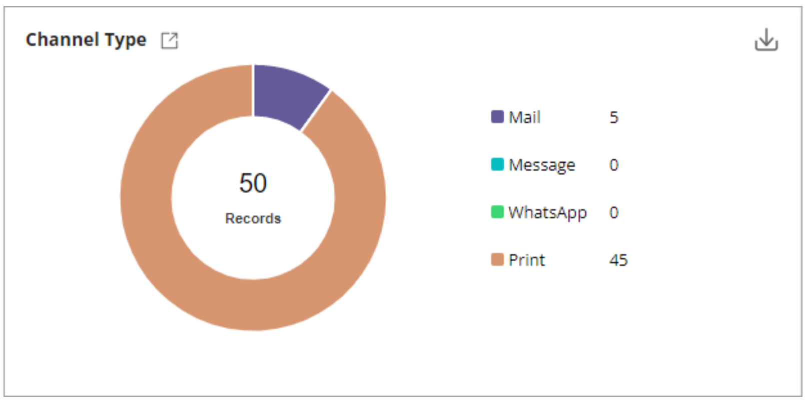
- Channel Type
- Communication Trends
- Top 10 Jobs

- Users
- Services
- Service Type

Channel type

The pie chart represents the relative proportions of the channels and the generations that happened in the OmniOMS.

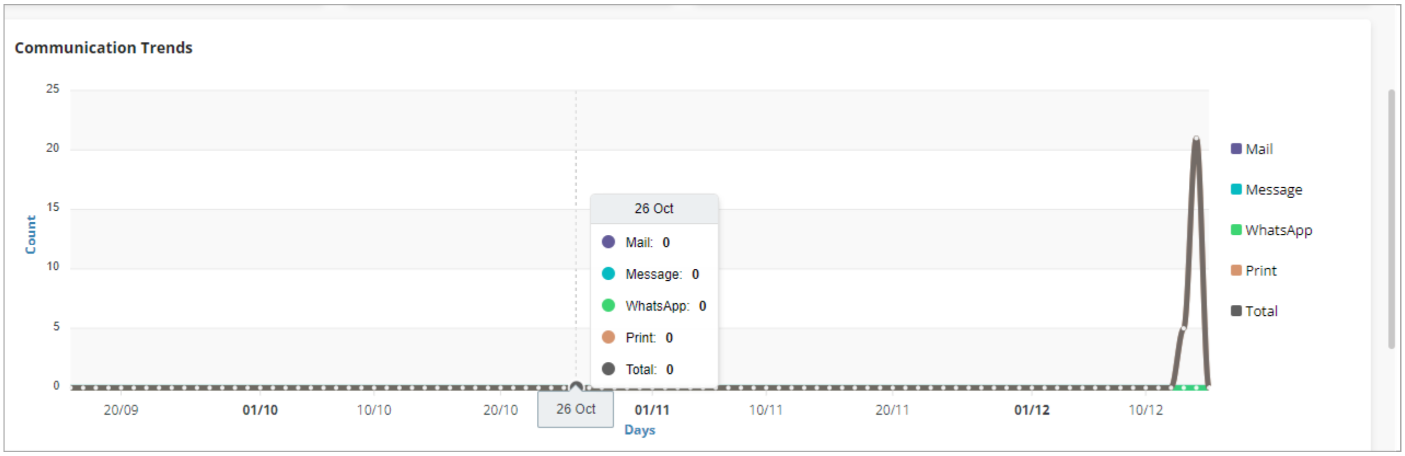
- Click the download icon to download the channel type trend details in .xlsx format.
- Click the expand icon to get redirected to the Channels tab.



Communication trends

The graph represents the trends in communication in OmniOMS over time. A trend line displays the generalization of data.

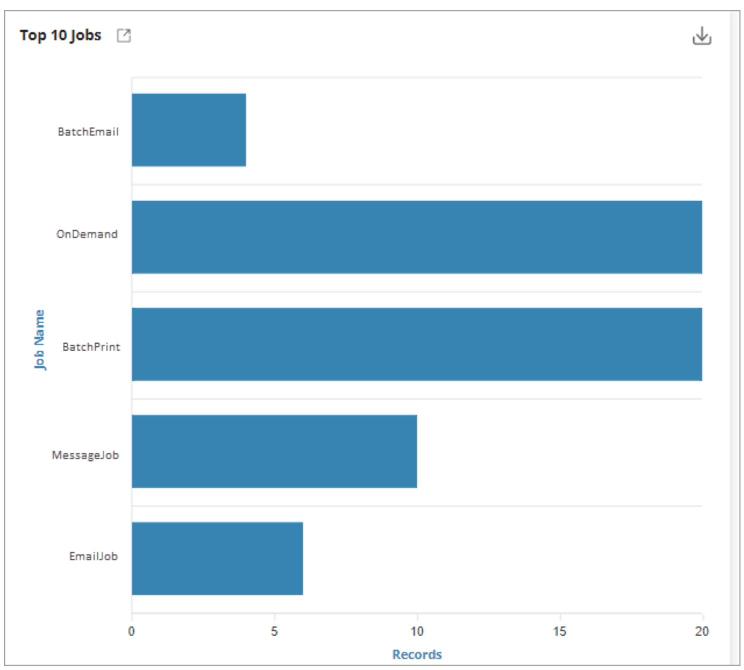
- Click the download icon to download the product-wise read analysis in .xlsx format.



Top 10 jobs

The graph represents the multiple job statements generated at different frequencies utilizing OmniOMS. It shows the job type used to perform generations primarily and top 10 jobs by volume (number of records generated) in a duration of time. It also shows the jobs generated primarily in the system.

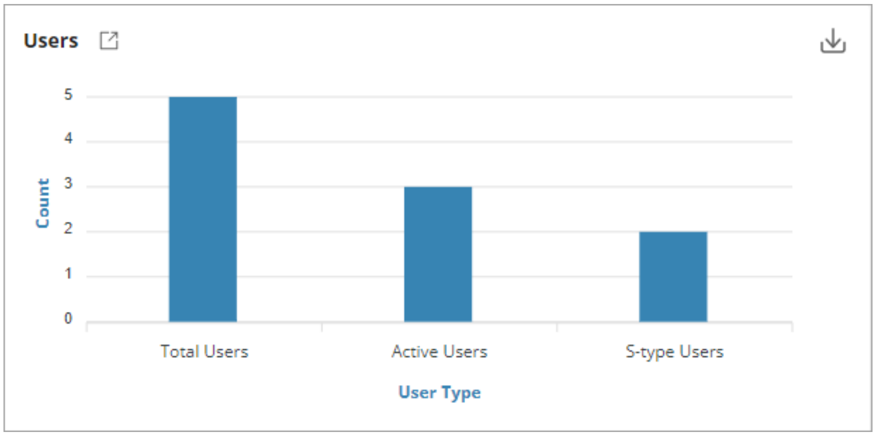
- Click the download icon to download the top 10 job details in .xlsx format.
- Click the expand icon to get redirected to the Monitor tab.



Users

The bar graph represents the total users, active users, and S-type users utilizing OmniOMS.

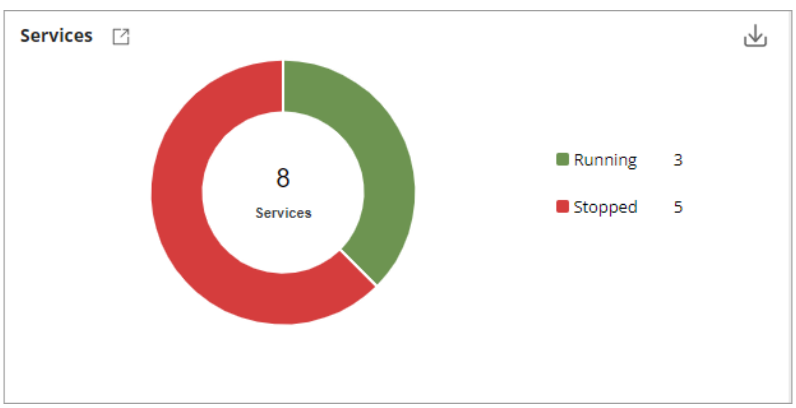
- Click the download icon to download the user details in .xlsx format.
- Click the expand icon to get redirected to the Users tab.



Services

The pie chart represents the total number of services that are running or stopped currently.

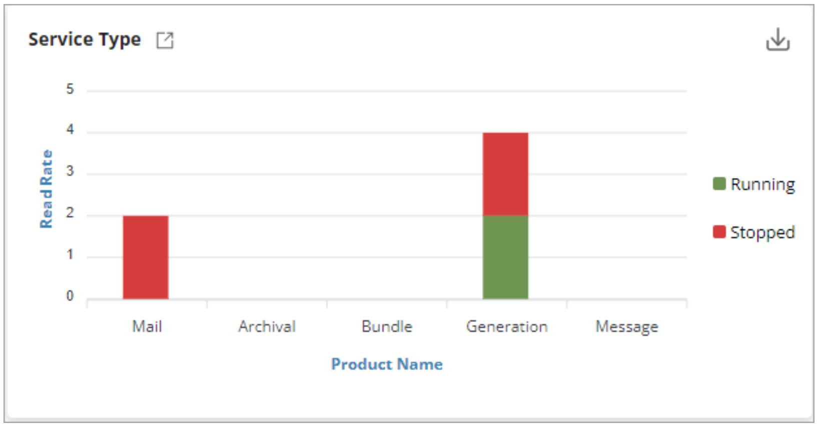
- Click the download icon to download the service details in .xlsx format.
- Click the expand icon to get redirected to the Services tab.



Service type

The bar graph represents the total number of service types that are running or stopped currently.

- Click the download icon to download the service type details in .xlsx format.
- Click the expand icon to get redirected to the Services tab.



Jobs tab

This chapter provides information on the Jobs tab present in OmniOMS Admin Workspace.

The tab does not appear by default, click **Jobs** in the menu bar to open it. It allows you to create and modify jobs and specify queue types. Created queues get linked to generation services, which then serve jobs within them.

The Jobs tab contains the following subtabs:

- Schedule
- Execute
- Monitor
- History

Schedule

The **Schedule** subtab appears by default. It allows you to group together jobs that need to run on a particular day. You can also add, modify, and delete schedules, as well as add or remove email, print, and text jobs.

Following table lists the options present in the Schedule subtab:

Field	Description
Searching schedule	Use the search bar to search the schedule by name.
Type of schedule	Select the **Schedule Type** using dropdown. The available options are: • Batch • On Demand Use the **All** option to view complete list of schedules irrespective of its type.
Job name	Select the **Job Name** using the dropdown.
List of schedules	Displays the list of schedules. The name and description of the schedule, and the jobs associated with the schedule appears.

Field	Description
Creating new schedule	Use the **+New Schedule** option to create a new schedule. For more information, see Creating new schedule.
Managing queues	Use the **Manage Queue** option to manage queues. For more information, see Managing queues.

To view the details of jobs associated with the schedule, click the expand icon present with the schedule name.

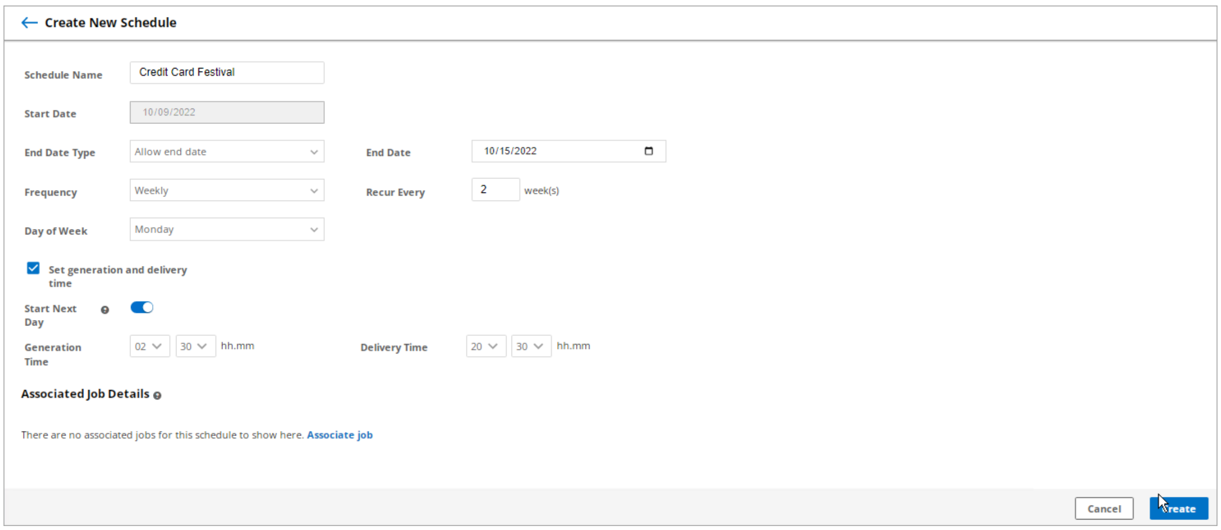
Creating a new schedule

To create a new schedule, follow the below steps:

1. Click **+New Schedule**. The Create New Schedule page appears.
2. Specify the following details:
   - **Schedule Name** — Enter the name of the schedule.
   - **Start Date** — The start date appears selected by default.
   - **End Date Type** — Select:
     - **No end date** — to not specify an end date. The End Date field appears disabled.

       Selecting **No end date** runs the schedule non-stop at the specified time.
     - **Allow end date** — to specify an end date. Select the required End Date.
     - **End After** — to specify number of instances after which the schedule ends. Specify the number of instance(s) after in the End After field.
   - **Frequency** — Select the frequency of the schedule as:
     - **Daily** — to run a schedule daily. Specify the number of day(s) after which the schedule recurs in **Recur Every** field. The Day of Week field appears disabled.
     - **Weekly** — to run a schedule weekly. Specify the number of week(s) after which the schedule recurs in **Recur Every** field. Then, select the **Day of Week** on which the schedule runs.
     - **Monthly** — to run a schedule monthly. Specify the number of month(s) after which the schedule recurs in **Recur Every** field. Then, specify the **Day of Month** on which the schedule runs. For example, specify 5 such that schedule runs on 5th of every month.

- **Yearly** — to run a schedule yearly. Specify the number of year(s) after which the schedule recurs in **Recur Every** field. Then, select the **Month**, specify the **Day** of the month on which the schedule runs in the **Day and Month** field.
- Select the **Set generation and delivery time** checkbox if you want to generate and deliver the job at a specific time of the day. Turn on the **Start Next Day** toggle to enable generation and delivery process after one day of instance creation. Then, select the **Generation Time** and then select the **Delivery Time**.



3. Click the **Associate job** link to associate job to the schedule. The list available jobs appear.

4. Select the required job that you want to associate with the schedule.
5. Select the **Queue Name** using the dropdown to link the job to a queue and set priority (only in the case of the priority-based queue).
6. Select the **Priority.**
7. Enter the **Filter** criteria as instance date=TO_DATE('<#instanceid#>', 'YYYY-MM-DD HH24:MI:SS') and scheduletype = 'D'.\
8. Click ✓ to complete job association.

> - Use the **Delete Selected** option to delete the selected job.
> - Use the **+ Associate New Job** option to associate a new job to the schedule. Click **Create** to save the new schedule.

Editing a schedule

To edit the schedule details, follow the below steps:

1. Hover over the name of the required schedule under the **Schedule** subtab and click the edit icon. The Edit Schedule page appears.
2. Make the required changes.
3. Click **Save**. The changes made to the schedule details get saved.

Deleting a schedule

To delete a user, follow the below steps:

1. Hover over the name of the required schedule under the **Schedule** subtab and click the delete icon. The Delete Schedule dialog appears.
2. Click **Delete**. The schedule gets deleted.

Execute

Click **Execute** to open the related subtab. It allows you to view and execute instances of due schedules. This tab displays the current instances that need to be executed.

Following table lists the options present in the Execute subtab:

Field	Description
Searching jobs	Use the search bar to search the job by name.
Date range	Click the Date Range icon to select the range for which you want to view the scheduled jobs. Select: • Last 7 days • Last 14 days • Last 30 days • Custom — to select a specific date range
Status	Click the **Status** dropdown and select the required option for which you want to view scheduled jobs.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>More filters</td><td>Click the More Filters button to apply the following filters to the job list:
Select the job name.
Select the queue name.
Select the schedule name.
Click Apply to get the filtered list.
Use the Reset to Default button to remove the applied filter and move to the default state of the list.</td></tr>
<tr><td>List of jobs</td><td>Displays the list of scheduled jobs.</td></tr>
</table>

Accessing additional options

In the Execute subtab, hover over the required job name and click the **More Options** ... icon, the following options appear:

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Process Data</td><td>Use this option to process the job execution.</td></tr>
<tr><td>Send for Approval</td><td>Use this option to send the job for approval.

The Send for Approval option appears enabled when the job requires approval.

As you select this option, the Send for Approval dialog appears. This dialog displays the master or sample key, allowing you to preview a report sample before sharing it for approval. You can click any specific key to preview the sample. Alternatively, you can enter a specific key in the Enter Master/Sample Key input box and click the Preview button to preview the sample. In case of an invalid entry, an error occurs, prompting you to enter a valid master key.
From the Send for Approval dialog, click the Send for Approval button to send the selected job for approval.</td></tr>
<tr><td>View Samples</td><td>Use this option to view samples for various jobs that you can refer to execute job. When a job includes saved templates, the View Samples link appears enabled, otherwise disabled. This sends the job to the queue list from where you can generate samples and send them for approval.</td></tr>
<tr><td>Delete</td><td>Use this option to delete the job from the execution queue list.</td></tr>
</table>

Monitor

Click **Monitor** to open the related subtab. It allows you to view and control the real-time progress of jobs executions.

Following table lists the options present in the Monitor subtab:

Field	Description
Searching jobs	Use the search bar to search the job by name.
Date range	Click the **Date Range** icon to select the range for which you want to monitor the jobs. Select: • Last 7 days • Last 14 days • Last 30 days • Custom — to select a specific date range
List of schedules	Select the required schedule using the dropdown.
More filters	Click the **More Filters** button to apply the following filters to the job list: • Select “Status”. • Select “Job Name” Use the **Reset to Default** button to remove the applied filter and move to the default state of list.
Refreshing data	Use the **Refresh** option to refresh and get the updated execution status.
List of jobs	Displays the list of jobs with the count of records that are being executed currently.

Accessing additional options

In the Monitor subtab, hover the required job name and click the **More Options** ... icon, the following options appear:

Option	Description
Retry	Use this option to resume and retry the paused execution of job schedules.
Move to history	Use this option to move the completed job schedule to the history.

Option	Description
Failed Records	Use this option to view the records of the failed executions.

History

Click **History** to open the related subtab. It allows you to view the complete data of an archived job.

Following table lists the options present in the History subtab:

Field	Description
Date range	Click the **Date Range** icon to select the range for which you want to view the archived job history. Select: • Last 7 days • Last 14 days • Last 30 days • Custom — to select a specific date range
Schedules	Select the required schedule using the dropdown.
Job	Select the required job using the dropdown.
List of archived jobs	Displays the list of archived (completed) jobs.

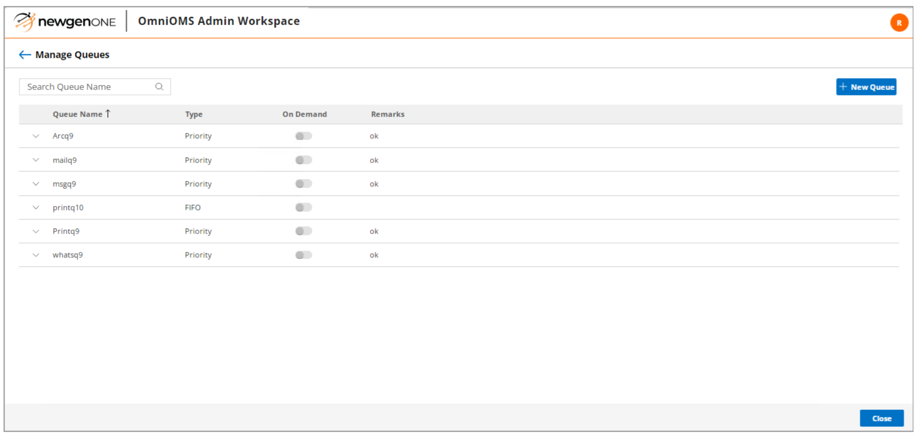
Accessing additional option

In the History subtab, hover over the required job name and click the **More Options** ... icon. Then, select the **Delete** option to delete the job history.

Managing queues

Click **Manage Queues** present in the upper-right corner. The Manage Queues page appears.

> Use the search bar to search the queue by name.



Adding a queue

To add a new queue, follow the below steps:

1. Click **+ New Queue**. A new queue gets added to the list.
2. Enter the **Queue Name**.
3. Select the **Queue Type** as Priority or FIFO.

   > The job gets executed according to priority which can be set among Lowest, Low, Medium, High, and Highest. You can set the Queue Type as "Priority" or else as FIFO to serve the requests on a First-In-First-Out basis.

4. Turn on the **On Demand** toggle to create an on-demand queue.
5. Enter the required **Remarks**.
6. Click to complete adding the queue.

Editing a queue

To edit the queue details, follow the below steps:

1. Hover over the name of the required queue and click the edit icon.
2. Make the required changes.
3. Click . The changes made to the queue get saved.

Deleting a queue

Hover over the name of the required queue, icon. Use this option to delete the queue.

Services tab

This chapter provides information on the Services tab present in the NewgenONE OmniOMS Admin Workspace. The tab does not appear by default, click **Services** in the menu bar to open it.
It allows you to create, modify, and monitor services. There are two types of services: Native services and microservices.

The microservice option appears only after you provide the microservice URL in the Cabinet-level Settings in the Configurations tab. Once enabled, you can create and view either microservices or normal services, but not both.

The following table lists the options present in the Services tab:

Field	Description
Searching service/channel/app server/ queue	Use this option to search a service, channel, app server, or queue by name.
Type of services	Use this option to sort the list based on the type of service. Select the Service Type using the dropdown.
Status	Use this option to sort the list based on the status of the service. Select the Status using the dropdown.
Refreshing data	Click **Refresh** to get the updated service status.
Creating new service	Click **+ New Service** to create a new service. For more information, see Creating new service.
List of services	Displays a list of available services.
Microservices	Turn on the **Microservices** toggle to enable the microservices.

Creating a service

To create a service, follow the below steps:

1. Click **+ New Service**. A list of types of services appears.

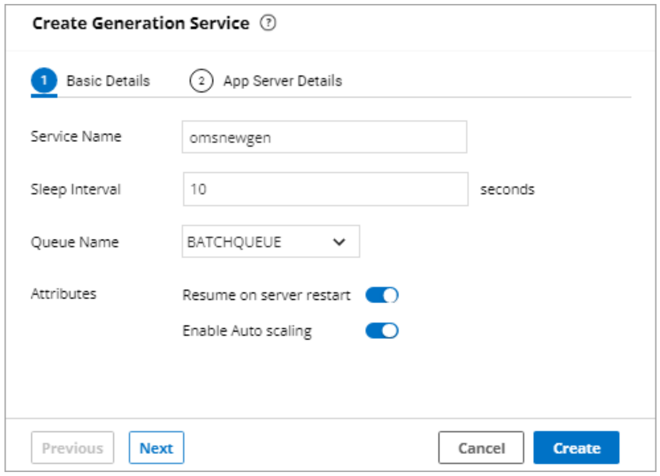
2. Select:
   - Generation — to create a generation service
   - Archival — to create an archival service
   - Mail — to create a mail service
   - Bounce Mail — to create a bounce mail service
   - Bundle — to create a bundle service
   - Email Notification — to create an email notification service
   - WhatsApp — to create a WhatsApp service
   - Message — to create a message service
   - X — to create an X service
   - Facebook — to create a Facebook service

Creating generation service

To create a generation service, follow the below steps:

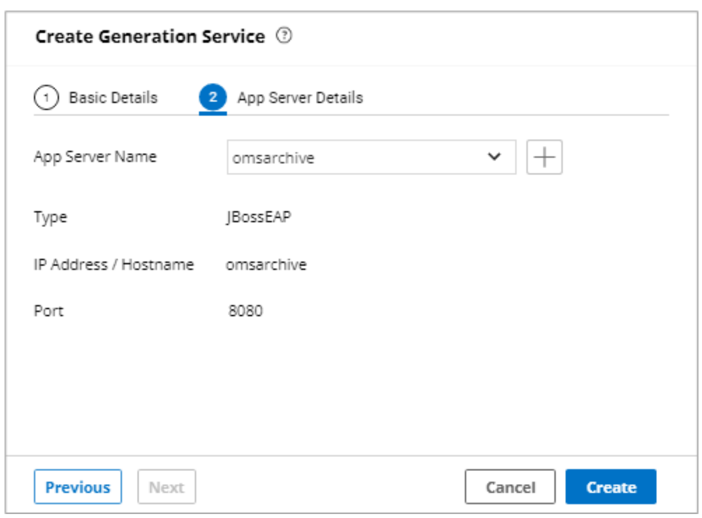
1. Click **+New Service > Generation**. The Create Generation Service dialog appears, displaying the Basic Details tab by default.
2. Refer to the below table to specify details in the given fields:

Field	Description
Service Name	Enter the name of the service.
Sleep Interval	Specify the sleep interval (in seconds) for the service to remain idle before its next execution cycle.
Queue Name	Select the queue name using the dropdown.
Attributes	• Resume on server restart — Turn on the toggle to resume the generation service whenever the server restarts. • Enable Autoscaling — Turn on the toggle to enable automatic scaling of the service.



3. Click **App Server Details** to open the related tab, or click **Next**.
4. Refer to the below table to specify details in the given fields:

Field	Description
App Server Name	Select the application server using the dropdown. OR Click the add icon ⊞ to create an application server.
Type	Displays the type of the application server.
IP Address / Hostname	Displays the IP address or the hostname of the application server.
Port	Displays the port number of the application server.



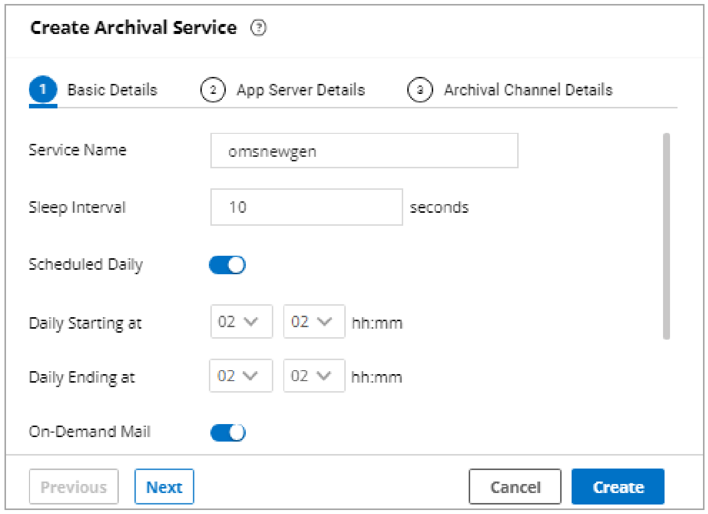
5. Click **Create** to complete the creation of the generation service.

Creating archival service

To create an archival service, follow the below steps:

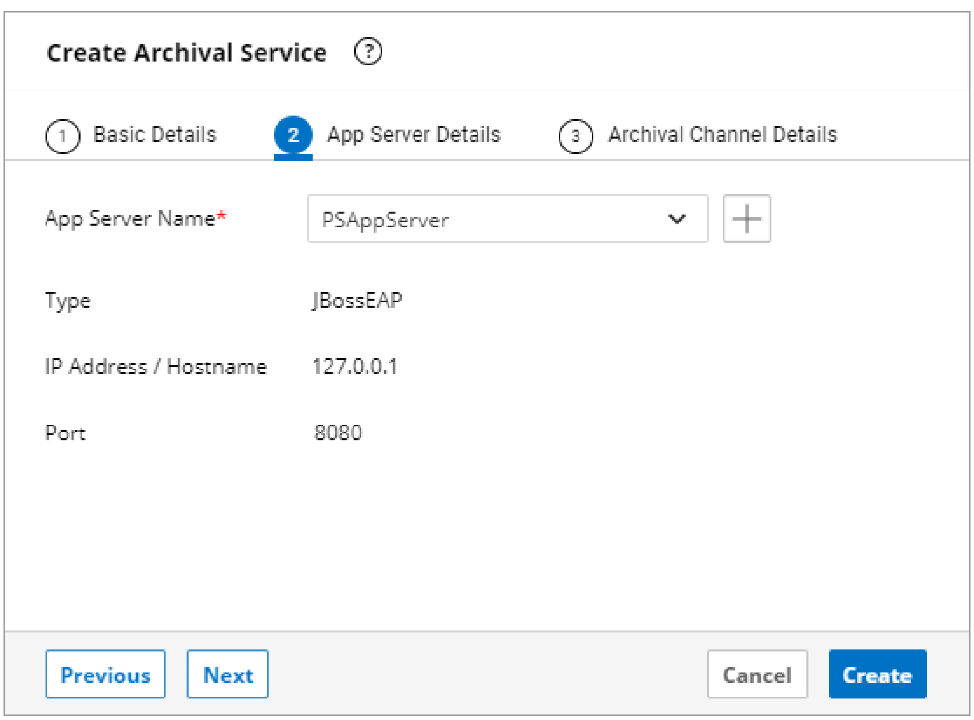
1. Click **+New Service > Archival**. The Create Archival Service dialog appears, displaying the Basic Details tab by default.
2. Refer to the below table to specify details in the given fields:

Field	Description
Service Name	Enter the name of the service.
Sleep Interval	Specify the sleep interval (in seconds) for the service to remain idle before its next execution cycle.
Scheduled Daily	Turn on the toggle to enable daily archival service.
Daily Starting at	This option gets enabled when you turn on the “Scheduled Daily” toggle. Set the service start time in a 24-hour format.
Daily Ending at	This option gets enabled when you turn on the “Scheduled Daily” toggle. Set the service end time in a 24-hour format.
On-Demand	Toggle the switch to enable or disable the on-demand service.
Queue Selection	Select: • Specific Queue — To map the service to process the batch jobs associated with the below-selected queue. • All except associated queues — To map the service to process the batch jobs of all the queues except the ones mapped under the specific queue option. Queue Selection field is only visible when the On-Demand toggle is disabled.
Queue Name	This option gets enabled when you select “Specific Queue” under Queue Selection or the On-Demand toggle is enabled. Select the queue name using the dropdown.
Attributes	• Resume on server restart — Turn on the toggle to resume the archival service whenever the server restarts. • Enable Autoscaling — Turn on the toggle to enable automatic scaling of the service.



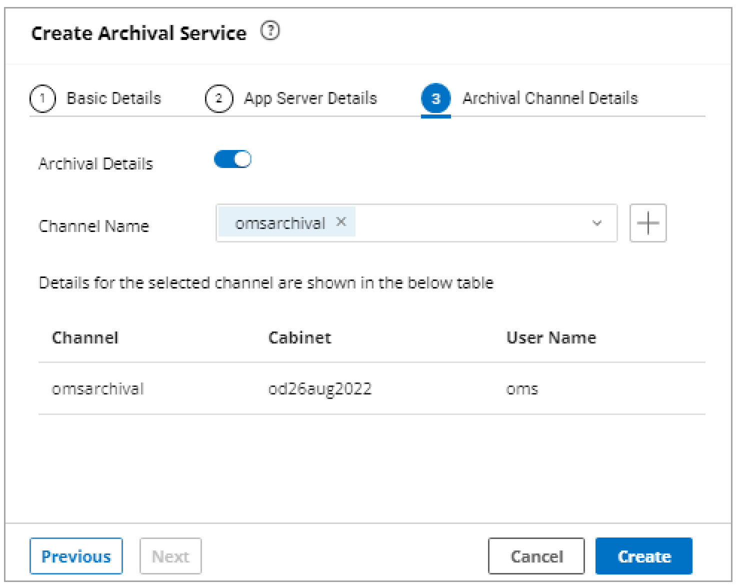
3. Click **App Server Details** to open the related tab, or click **Next**.
4. Refer to the below table to specify details in the given fields:

Field	Description
App Server Name	Select the application server using the dropdown. OR Click the add icon to create an application server.
Type	Displays the type of the application server.
IP Address / Hostname	Displays the IP address or the hostname of the application server.
Port	Displays the port number of the application server.



5. Click **Archival Channel Details** to open the related tab, or click **Next**.
6. Refer to the below table to specify details in the given fields:

Field	Description
Archival Details	Turn on the "Archival Details" toggle to enable the selection of the archival channel.
Channel Name	Select the channel using the dropdown. OR Click the add icon to create an archival channel.
Details of the selected channel	Displays the details (Channel, Cabinet, and User Name) of the selected channel.



7. Click **Create** to complete the creation of the archival service.

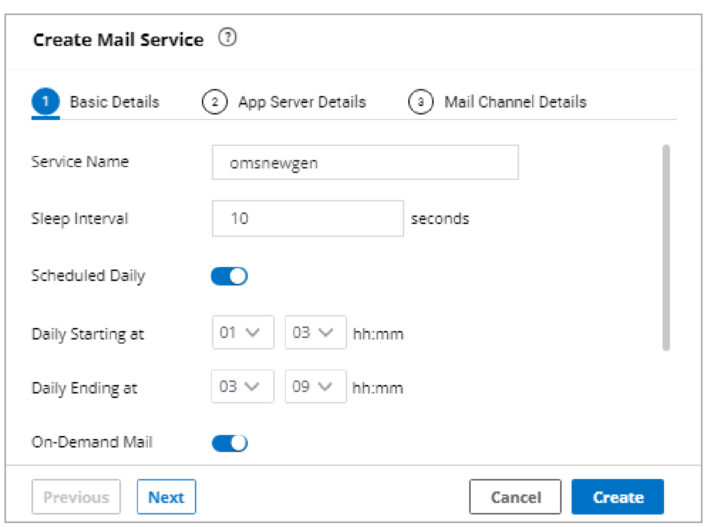
Creating mail service

To create a mail service, follow the below steps:

1. Click **+New Service > Mail**. The Create Mail Service dialog appears, displaying the Basic Details tab by default.
2. Refer to the below table to specify details in the given fields:

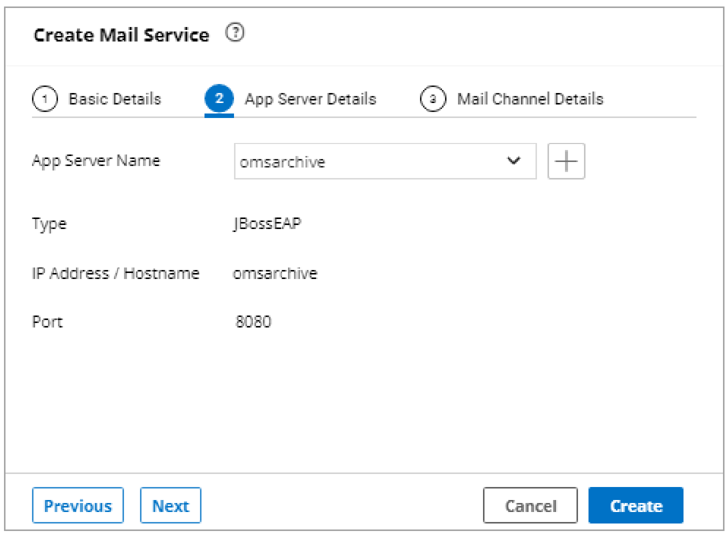
Field	Description
Service Name	Enter the name of the service.

Field	Description
Sleep Interval	Specify the sleep interval (in seconds) for the service to remain idle before its next execution cycle.
Scheduled Daily	Turn on the toggle to enable daily mail service.
Daily Starting at	This option gets enabled when you turn on the Scheduled Daily toggle. Set the service start time in a 24-hour format.
Daily Ending at	This option gets enabled when you turn on the Scheduled Daily toggle. Set the service start time in a 24-hour format.
On-Demand Mail	Toggle the switch to enable or disable the on-demand service.
Queue Selection	Select: • Specific Queue — To map the service to process the batch jobs that are associated with the below-selected queue. • All except associated queues — To map the service to process the batch jobs of all the queues except the ones mapped under the specific queue option. Queue Selection field is only visible when the On-Demand toggle is disabled.
Queue Name	This option gets enabled when you select Specific Queue under Queue Selection or the On-Demand toggle is enabled. Select the queue name using the dropdown.
Attributes	• Resume on server restart — Turn on the toggle to resume the mail service whenever the server restarts. • Enable Autoscaling — Turn on the toggle to enable automatic scaling of the service.



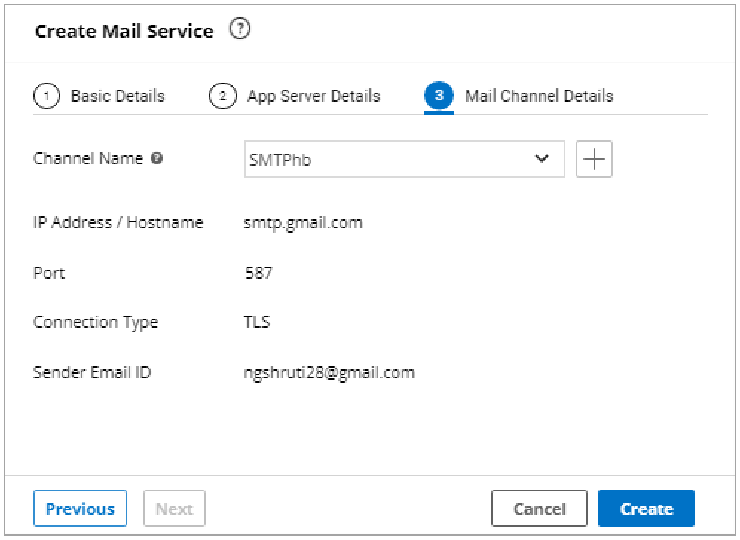
3. Click **App Server Details** to open the related tab, or click **Next**.
4. Refer to the table below to specify details in the given fields:

Field	Description
App Server Name	Select the application server using the dropdown. OR Click the add icon to create an application server.
Type	Displays the type of the application server.
IP Address / Hostname	Displays the IP address or the hostname of the application server.
Port	Displays the port number of the application server.



5. Click **Mail Channel Details** to open the related tab, or click **Next**.
6. Refer to the below table to specify details in the given fields:

Field	Description
Channel Name	Select the channel using the dropdown. OR Click the add icon to create a mail channel.
Sender Email ID	Displays the sender's email ID of the selected Mail channel.
IP Address / Hostname	Displays the IP address or hostname of the selected Mail channel.
Port	Displays the port number of the selected Mail channel.
Connection Type	Displays the connection type of the selected Mail channel.



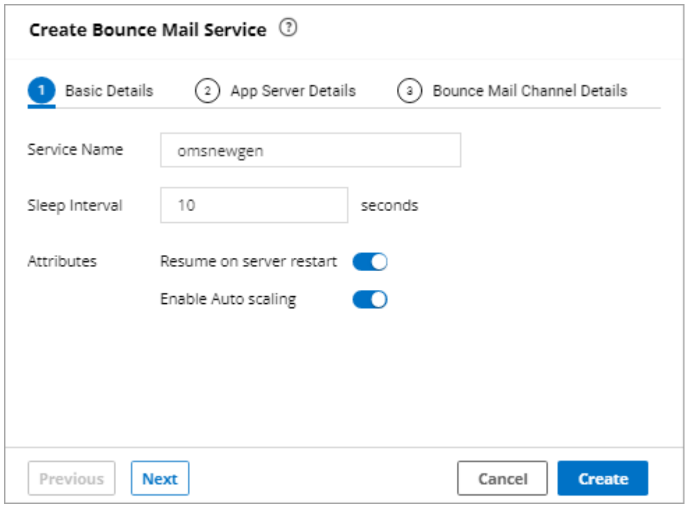
7. Click **Create** to complete the creation of mail service.

Creating bounce mail service

To create a bounce mail service, follow the below steps:

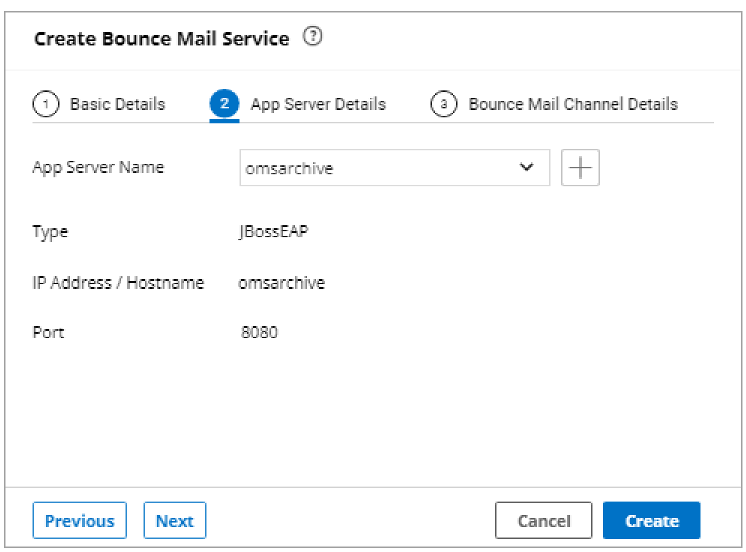
1. Click **+New Service > Bounce Mail**. The Create Bounce Mail Service dialog appears, displaying the Basic Details tab by default.
2. Refer to the below table to specify details in the given fields:

Field	Description
Service Name	Enter the name of the service.
Sleep Interval	Specify the sleep interval (in seconds) for the service to remain idle before its next execution cycle.
Attributes	• Resume on server restart — Turn on the toggle to resume the bounce mail service whenever the server restarts. • Enable Auto scaling — Turn on the toggle to enable automatic scaling of the service.



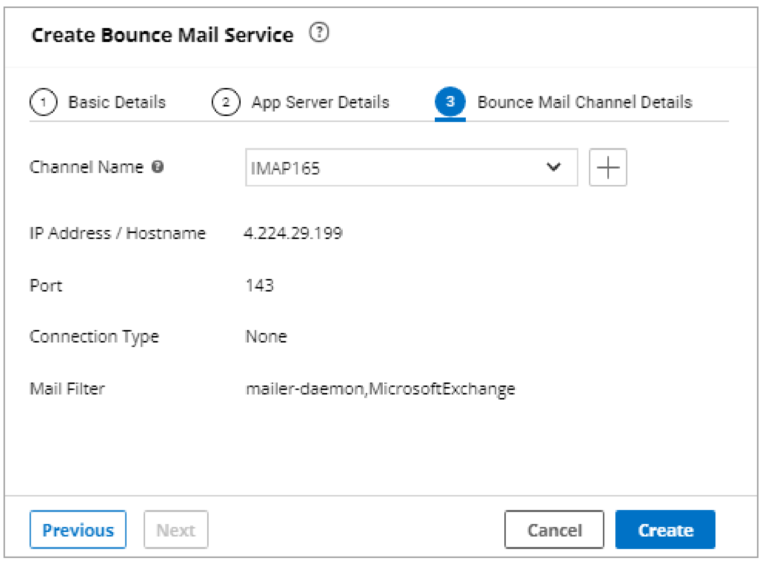
3. Click **App Server Details** to open the related tab, or click **Next**.
4. Refer to the table below to specify details in the given fields:

Field	Description
App Server Name	Select the application server using the dropdown. OR Click the add icon ⊞ to create an application server.
Type	Displays the type of the application server.
IP Address / Hostname	Displays the IP address or the hostname of the application server.
Port	Displays the port number of the application server.



5. Click **Bounce Mail Channel Details** to open the related tab, or click **Next**.
6. Refer to the below table to specify details in the given fields:

Field	Description
Channel Name	Select the channel using the dropdown. OR Click the add icon ⊞ to create a bounce mail channel.
Sender Email ID	Displays the sender's email ID of the selected bounce mail channel.
IP Address / Hostname	Displays the IP address or hostname of the selected bounce mail channel.
Port	Displays the port number of the selected bounce mail channel.
Connection Type	Displays the connection type of the selected bounce mail channel.
Mail Filter	Displays the filter applied on the selected bounce mail channel.



7. Click **Create** to complete the creation of the bounce mail service.

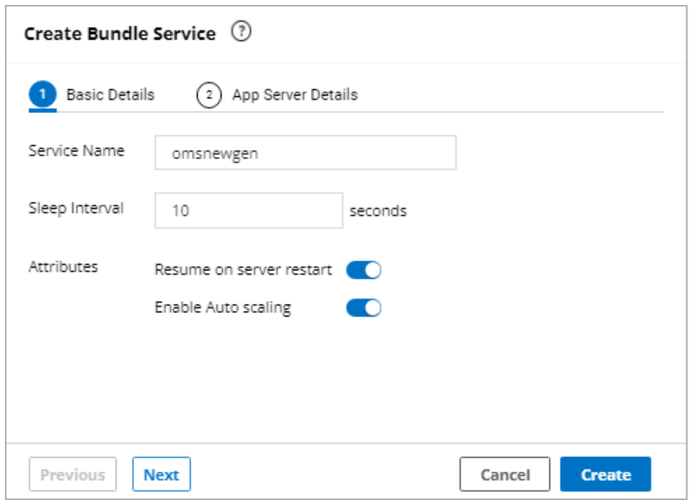
Creating bundle service

To create a bundle service, follow the below steps:

1. Click **+New Service > Bundle**. The Create Bundle Service dialog appears, displaying the Basic Details tab by default.
2. Refer to the below table to specify details in the given fields:

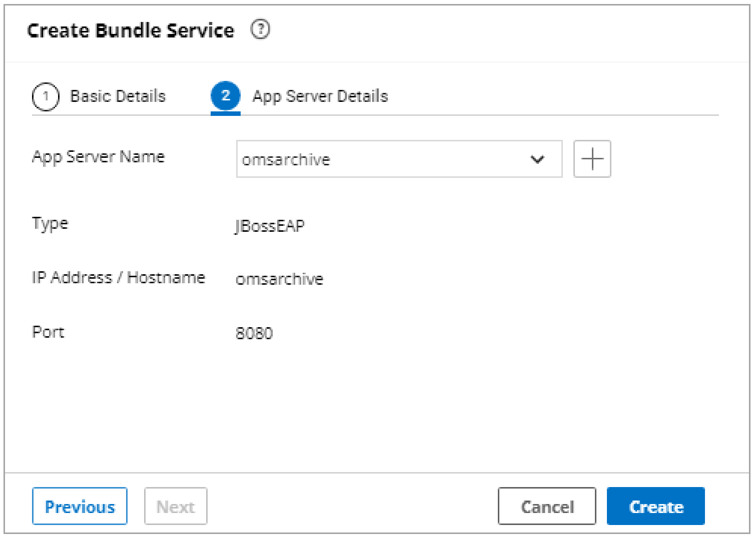
Field	Description
Service Name	Enter the name of the service.

Field	Description
Sleep Interval	Specify the sleep interval (in seconds) for the service to remain idle before its next execution cycle.
Attributes	• Resume on server restart — Turn on the toggle to resume the bundle service whenever the server restarts. • Enable Auto scaling — Turn on the toggle to enable automatic scaling of the service.



3. Click **App Server Details** to open the related tab or click **Next**.
4. Refer the below table to specify details in the given fields:

Field	Description
App Server Name	Select the application server using the dropdown. OR Click the add icon ⊞ to create an application server.
Type	Displays the type of the application server.
IP Address / Hostname	Displays the IP address or the hostname of the application server.
Port	Displays the port number of the application server.



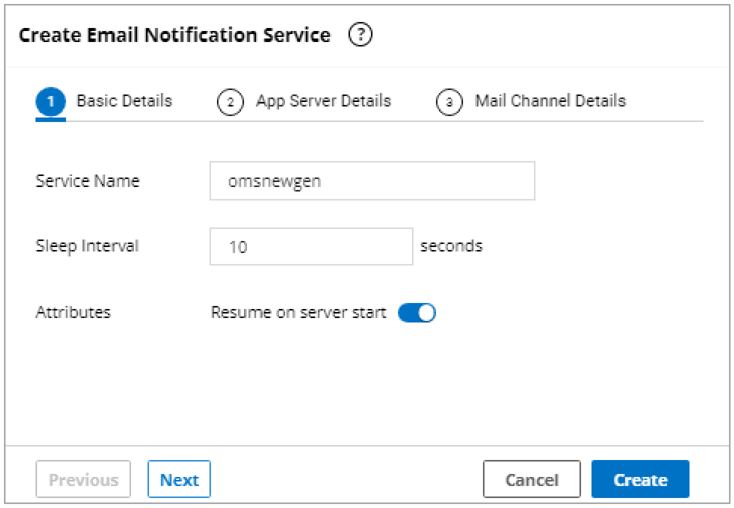
5. Click **Create** to complete the creation of the bundle service.

Creating email notification service

To create email notification service, follow the below steps:

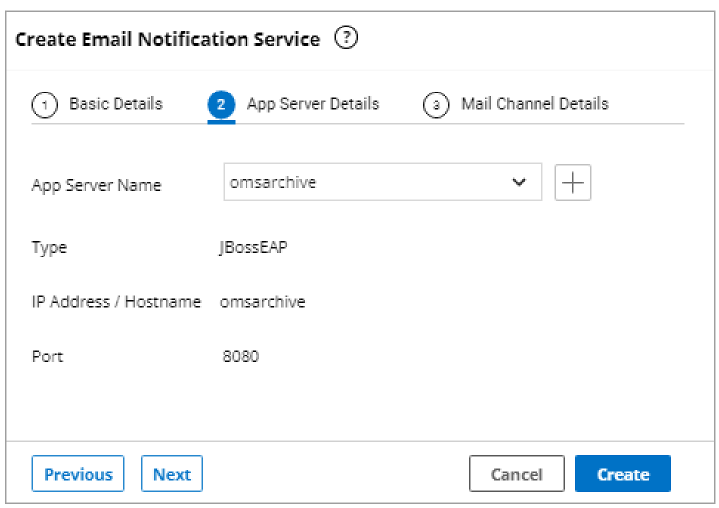
1. Click **+New Service > Email Notification**. The Create Email Notification Service dialog appears, displaying the Basic Details tab by default.
2. Refer the below table to specify details in the given fields:

Field	Description
Service Name	Enter the name of the service.
Sleep Interval	Specify the sleep interval (in seconds) for the service to remain idle before its next execution cycle.
Attributes	• Resume on server restart — Turn on the toggle to resume the email notification service whenever the server restarts. • Enable Auto scaling — Turn on the toggle to enable automatic scaling of the service.



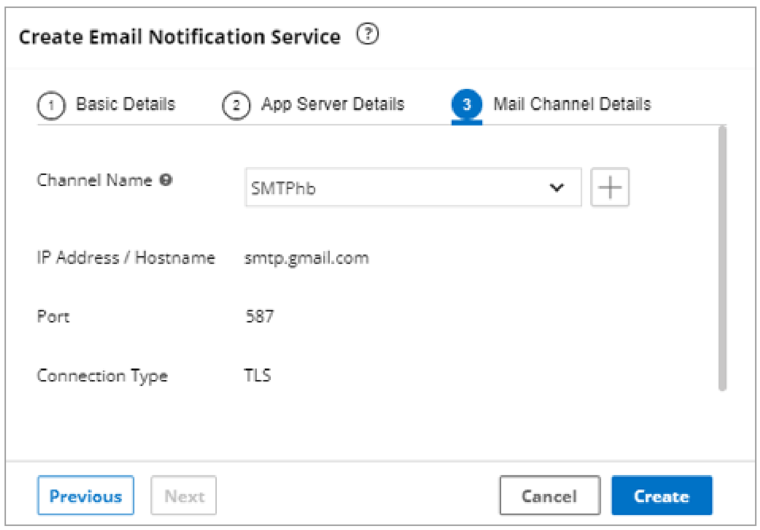
3. Click **App Server Details** to open the related tab, or click **Next**.
4. Refer to the below table to specify details in the given fields:

Field	Description
App Server Name	Select the application server using the dropdown. OR Click the add icon ⊞ to create an application server.
Type	Displays the type of the application server.
IP Address / Hostname	Displays the IP address or the hostname of the application server.
Port	Displays the port number of the application server.



5. Click **Mail Channel Details** to open the related tab, or click **Next**.
6. Refer to the below table to specify details in the given fields:

Field	Description
Channel Name	Select the channel using the dropdown. OR Click the add icon ⊞ to create a mail channel.
IP Address / Hostname	Displays the IP address or hostname of the selected Mail channel.
Port	Displays the port number of the selected Mail channel.
Connection Type	Displays the connection type of the selected Mail channel.



7. Click **Create** to complete the creation of email notification service.

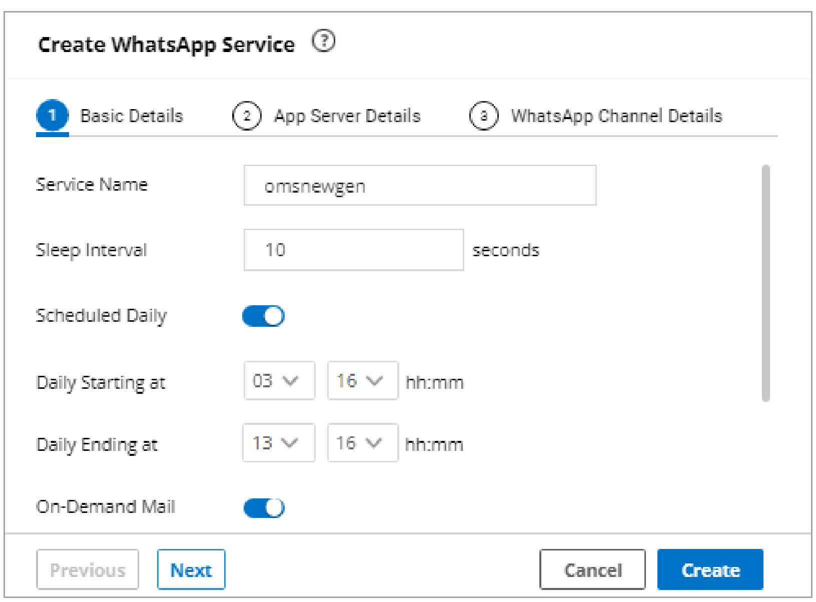
Creating WhatsApp service

To create a WhatsApp service, follow the below steps:

1. Click **+New Service > WhatsApp**. The Create WhatsApp Service dialog appears, displaying the Basic Details tab by default.
2. Refer to the table below to specify details in the given fields:

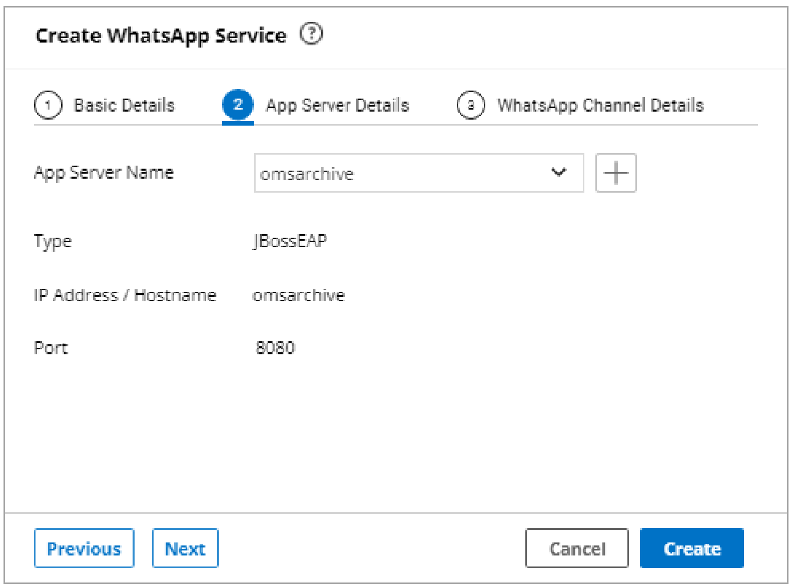
Field	Description
Service Name	Enter the name of the service.
Sleep Interval	Specify the sleep interval (in seconds) for the service to remain idle before its next execution cycle.
Scheduled Daily	Turn on the toggle to enable daily WhatsApp service.

Field	Description
Daily Starting at	This option gets enabled when you turn on the “Scheduled Daily” toggle. Set the service start time in a 24-hour format.
Daily Ending at	This option gets enabled when you turn on the “Scheduled Daily” toggle. Set the service start time in a 24-hour format.
On-Demand Mail	Toggle the switch to enable or disable the on-demand service.
Queue Selection	Select: • Specific Queue — To map the service to process the batch jobs that are associated with the below-selected queue. • All except associated queues — To map the service to process the batch jobs of all the queues except the ones mapped under the specific queue option. Queue Selection field is only visible when the On-Demand toggle is disabled.
Queue Name	This option gets enabled when you select “Specific Queue” under Queue Selection or the On-Demand toggle is enabled. Select the queue name using the dropdown.
Attributes	• Resume on server restart — Turn on the toggle to resume the WhatsApp service whenever the server restarts. • Enable Autoscaling — Turn on the toggle to enable automatic scaling of the service.



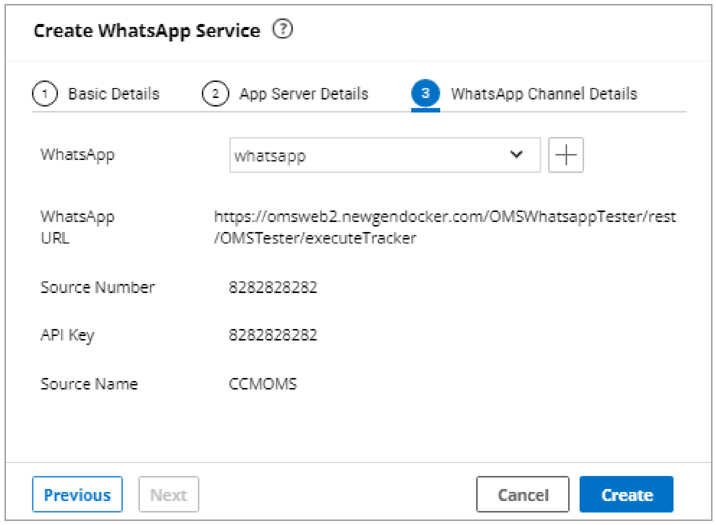
3. Click **App Server Details** to open the related tab, or click **Next**.
4. Refer to the below table to specify details in the given fields:

Field	Description
App Server Name	Select the application server using the dropdown. OR Click the add icon ⊞ to create an application server.
Type	Displays the type of the application server.
IP Address / Hostname	Displays the IP address or the hostname of the application server.
Port	Displays the port number of the application server.



5. Click **WhatsApp Channel Details** to open the related tab, or click **Next**.
6. Refer to the below table to specify details in the given fields:

Field	Description
WhatsApp	Select the channel using the dropdown. OR Click the add icon ⊞ to create a WhatsApp channel.
WhatsApp URL	Displays the URL of the selected WhatsApp channel.
Source Number	Displays the source number of the selected WhatsApp channel.
API Key	Displays the API key of the selected WhatsApp channel.
Source Name	Displays the source name of the selected WhatsApp channel.



7. Click **Create** to complete the creation of WhatsApp service.

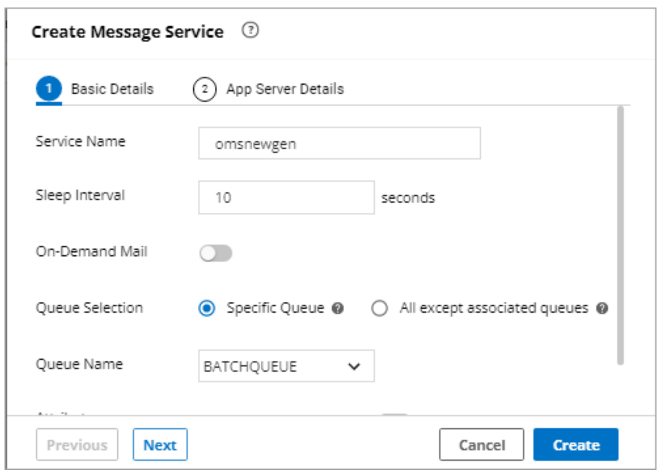
Creating message service

To create message service, follow the below steps:

1. Click **+New Service > Message**. The Create Message Service dialog appears, displaying the Basic Details tab by default.
2. Refer to the below table to specify details in the given fields:

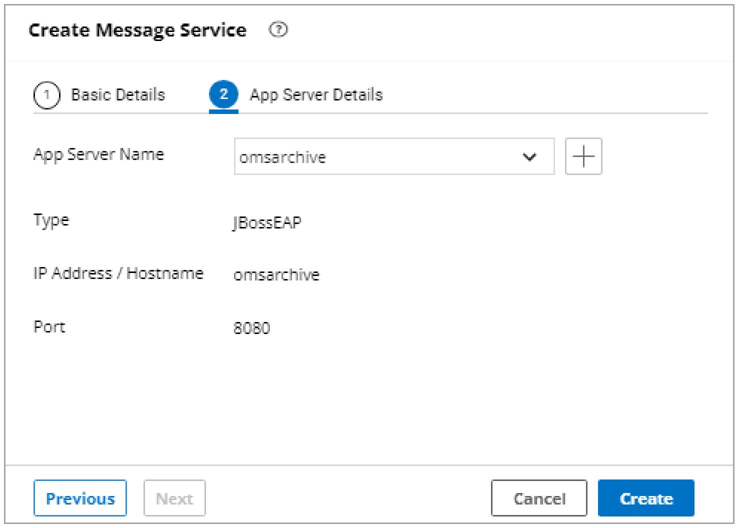
Field	Description
Service Name	Enter the name of the service.
Sleep Interval	Specify the sleep interval (in seconds) for the service to remain idle before its next execution cycle.
On-Demand Mail	Toggle the switch to enable or disable the on-demand service.
Schedule Daily	Turn on the toggle to enable daily message service.
Daily Starting at	This option gets enabled when you turn on the Scheduled Daily toggle. Set the service start time in a 24-hour format.
Daily Ending at	This option gets enabled when you turn on the Scheduled Daily toggle. Set the service start time in a 24-hour format.

Field	Description
Queue Selection	Select: • Specific Queue — to map the service to process the batch jobs that are associated with the below-selected queue. • All except associated queues — to map the service to process the batch jobs of all the queues except the ones mapped under the specific queue option.
Queue Name	This option gets enabled when you select "Specific Queue" under Queue Selection or the On-Demand toggle is enabled. Select the queue name using the dropdown.
Attributes	• Resume on server restart — Turn on the toggle to resume the message service whenever the server restarts. • Enable Autoscaling — Turn on the toggle to enable automatic scaling of the service.



3. Click **App Server Details** to open the related tab or click Next.
4. Refer the below table to specify details in the given fields:

Field	Description
App Server Name	Select the application server using the dropdown. OR Click the add icon ⊞ to create an application server.
Type	Displays the type of the application server.
IP Address / Hostname	Displays the IP address or the hostname of the application server.
Port	Displays the port number of the application server.



5. Click **Create** to complete the creation of the message service.

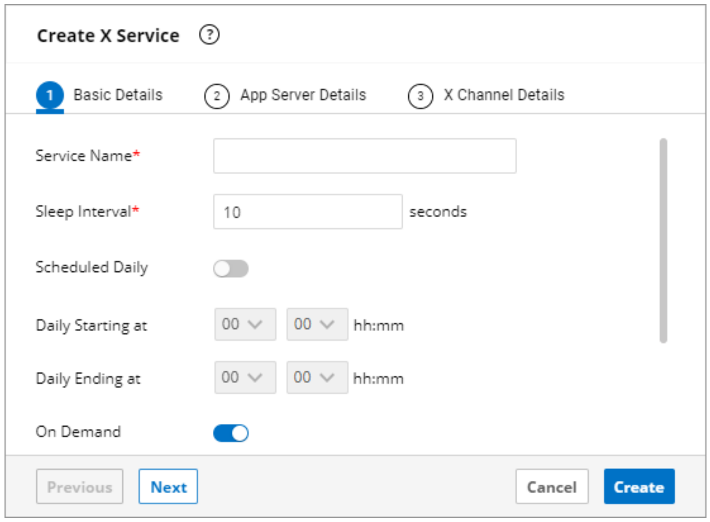
Creating X service

To create an X service, follow the below steps:

1. Click **+New Service > X**. The Create X Service dialog displays the Basic Details tab by default.
2. Refer to the table below to specify details in the given fields:

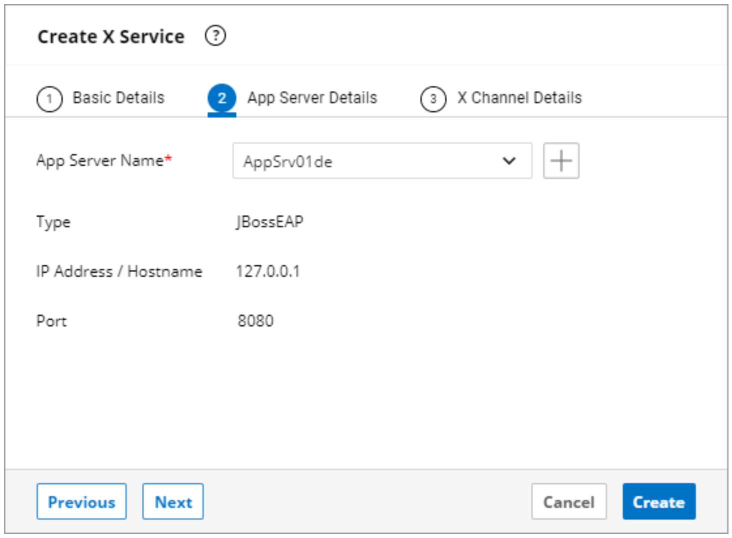
Field	Description
Service Name	Enter the name of the service.
Sleep Interval	Enter the interval (in seconds) for which the service runs.
Scheduled Daily	Turn on the toggle to enable daily X service.
Daily Starting at	This option gets enabled when you turn on the Scheduled Daily toggle. Set the service start time in a 24-hour format.
Daily Ending at	This option gets enabled when you turn on the Scheduled Daily toggle. Set the service start time in a 24-hour format.
On-Demand	Toggle the switch to enable or disable the on-demand service. It is always enabled in the case of X service.
Queue Name	Select the queue name using the dropdown.

Field	Description
Attributes	• Resume on server restart — Turn on the toggle to resume the X service whenever the server restarts. • Enable Autoscaling — Turn on the toggle to enable automatic service scaling.



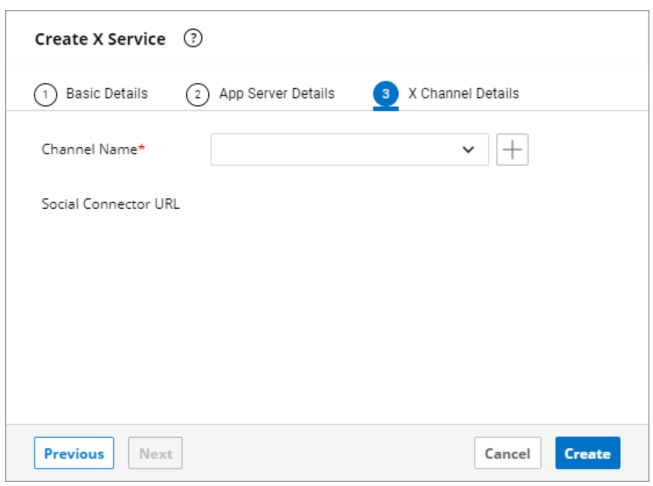
3. Click **App Server Details** to open the related tab, or click **Next**.
4. Refer to the table below to specify details in the given fields:

Field	Description
App Server Name	Select the application server using the dropdown. OR Click the add icon ⊞ to create an application server.
Type	Displays the type of the application server.
IP Address / Hostname	Displays the IP address or the hostname of the application server.
Port	Displays the port number of the application server.



5. Click **X Channel Details** to open the related tab or click **Next**.
6. Refer to the below table to specify details in the given fields:

Field	Description
Channel Name	Select the channel using the dropdown. OR Click the add icon ⊞ to create X channel.
Social Connector URL	Displays the URL of the selected X channel.



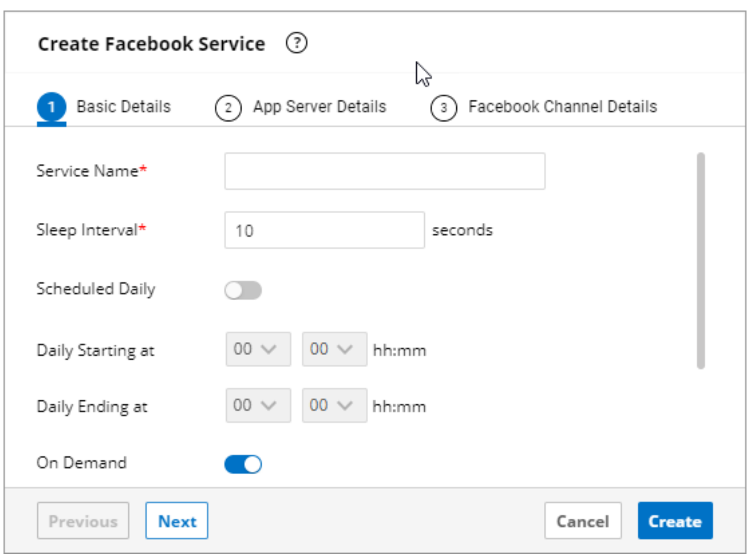
7. Click **Create** to complete the creation of X service.

Creating Facebook service

To create a Facebook service, follow the below steps:

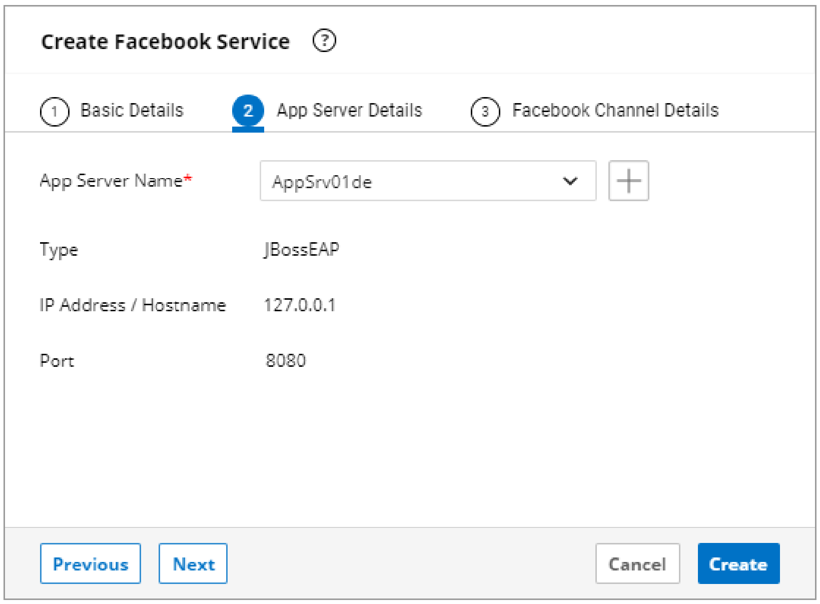
1. Click **+New Service > Facebook**. The Create Facebook Service dialog appears, displaying the Basic Details tab by default.
2. Refer to the below table to specify details in the given fields:

Field	Description
Service Name	Enter the name of the service.
Sleep Interval	Specify the sleep interval (in seconds) for the service to remain idle before its next execution cycle.
Scheduled Daily	Turn on the toggle to enable daily Facebook service.
Daily Starting at	This option gets enabled when you turn on the Scheduled Daily toggle. Set the service start time in a 24-hour format.
Daily Ending at	This option gets enabled when you turn on the Scheduled Daily toggle. Set the service start time in a 24-hour format.
On-Demand	Toggle the switch to enable or disable the on-demand service. It is always enabled in the case of Facebook service.
Queue Name	Select the queue name using the dropdown.
Attributes	• Resume on server restart — Turn on the toggle to resume the Facebook service whenever the server restarts. • Enable Autoscaling — Turn on the toggle to enable automatic service scaling.



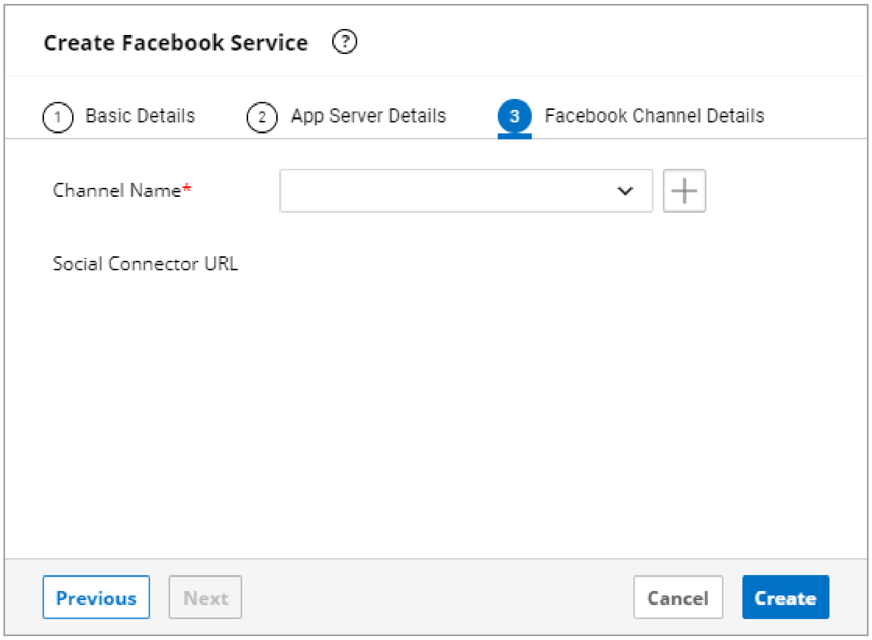
3. Click **App Server Details** to open the related tab, or click **Next**.
4. Refer to the below table to specify details in the given fields:

Field	Description
App Server Name	Select the application server using the dropdown. OR Click the add icon ⊞ to create an application server.
Type	Displays the type of the application server.
IP Address / Hostname	Displays the IP address or the hostname of the application server.
Port	Displays the port number of the application server.



5. Click **Facebook Channel Details** to open the related tab, or click **Next**.
6. Refer to the below table to specify details in the given fields:

Field	Description
Channel Name	Select the channel using the dropdown. OR Click the add icon ⊞ to create facebook channel.
Social Connector URL	Displays the URL of the selected Facebook channel.



7. Click **Create** to finalize the Facebook service.

Creating a Microservice

To create a microservice, follow the below steps:

1. Turn on the **Microservices** toggle.
2. Click **+ New Service**. A list of types of services appears.
3. Select:
   - Generation — to create a generation service
   - Archival — to create an archival service
   - Mail — to create a mail service
   - WhatsApp — to create a WhatsApp service
   - Message — to create a message service
   - X — to create an X service
   - Facebook — to create a Facebook service

Creating generation service

To create a generation service, follow the below steps:

1. Click **+New Service > Generation**. The Create Generation Service dialog appears, displaying the Basic Details tab by default.

2. Refer to the below table to specify details in the given fields:

Field	Description
Service Name	Enter the name of the service.
Sleep Interval	Specify the sleep interval (in seconds) for the service to remain idle before its next execution cycle.
Queue Name	Select the queue name using the dropdown.
Attributes	Enable Autoscaling — Turn on the toggle to enable automatic scaling of the service.

3. Click **Create** to finalize the generation service.

Creating archival service

To create an archival service, follow the below steps:

1. Click **+New Service > Archival**. The Create Archival Service dialog displays the Basic Details tab by default.
2. Refer the below table to specify details in the given fields:

Field	Description
Service Name	Enter the name of the service.
Sleep Interval	Specify the sleep interval (in seconds) for the service to remain idle before its next execution cycle.
Scheduled Daily	Turn on the toggle to enable daily archival service.
Daily Starting at	This option gets enabled when you turn on the “Scheduled Daily” toggle. Set the service start time in a 24-hour format.
Daily Ending at	This option gets enabled when you turn on the “Scheduled Daily” toggle. Set the service start time in a 24-hour format.
On-Demand Mail	Toggle the switch to enable or disable the on-demand service.

Field	Description
Queue Selection	Select: • Specific Queue — To map the service to process the batch jobs that are associated with the below-selected queue. • All except associated queues — To map the service to process the batch jobs of all the queues except the ones mapped under the specific queue option. Queue Selection field is only visible when the On-Demand toggle is disabled.
Queue Name	This option is enabled when you select "Specific Queue" under Queue Selection or when the On-Demand toggle is enabled. Select the queue name using the dropdown.
Attributes	Enable Auto scaling — Turn on the toggle to enable automatic scaling of the service.

3. Click **Archival Channel Details** to open the related tab or click **Next**.
4. Refer to the below table to specify details in the given fields:

Field	Description
Archival Details	Turn on the "Archival Details" toggle to enable selection of archival channel.
Channel Name	Select the channel using the dropdown. OR Click the add icon ⊞ to create an archival channel.
Details of the selected channel	Displays the details (Channel, Cabinet, and User Name) of the selected channel.

5. Click **Create** to finalize the archival service.

Creating mail service

To create a mail service, follow the below steps:

1. Click **+New Service > Mail**. The Create Mail Service dialog appears, displaying the Basic Details tab by default.
2. Refer to the below table to specify details in the given fields:

Field	Description
Service Name	Enter the name of the service.
Sleep Interval	Specify the sleep interval (in seconds) for the service to remain idle before its next execution cycle.
Scheduled Daily	Turn on the toggle to enable daily mail service.
Daily Starting at	This option gets enabled when you turn on the Scheduled Daily toggle. Set the service start time in a 24-hour format.
Daily Ending at	This option gets enabled when you turn on the Scheduled Daily toggle. Set the service start time in a 24-hour format.
On-Demand Mail	Toggle the switch to enable or disable the on-demand service.
Queue Selection	Select: • Specific Queue — To map the service to process the batch jobs associated with the below-selected queue. • All except associated queues — To map the service to process the batch jobs of all the queues except the ones mapped under the specific queue option. Queue Selection field is only visible when the On-Demand toggle is disabled.
Queue Name	This option gets enabled when you select Specific Queue under Queue Selection or when the On-Demand toggle is enabled. Select the queue name using the dropdown.
Attributes	Enable Autoscaling — Turn on the toggle to enable automatic service scaling.

3. Click **Mail Channel Details** to open the related tab, or click **Next**.
4. Refer to the below table to specify details in the given fields:

Field	Description
Channel Name	Select the channel using the dropdown. OR Click the add icon ⊞ to create a mail channel.
Sender Email ID	Displays the sender's email ID of the selected Mail channel.
IP Address / Hostname	Displays the IP address or hostname of the selected Mail channel.

Field	Description
Port	Displays the port number of the selected Mail channel.
Connection Type	Displays the connection type of the selected Mail channel.

5. Click **Create** to finalize the mail service.

Creating WhatsApp service

To create a WhatsApp service, follow the below steps:

1. Click **+New Service > WhatsApp**. The Create WhatsApp Service dialog appears, displaying the Basic Details tab by default..
2. Refer to the below table to specify details in the given fields:

Field	Description
Service Name	Enter the name of the service.
Sleep Interval	Specify the sleep interval (in seconds) for the service to remain idle before its next execution cycle.
Scheduled Daily	Turn on the toggle to enable daily WhatsApp service.
Daily Starting at	This option gets enabled when you turn on the “Scheduled Daily” toggle. Set the service start time in a 24-hour format.
Daily Ending at	This option gets enabled when you turn on the “Scheduled Daily” toggle. Set the service start time in a 24-hour format.
On-Demand Mail	Toggle the switch to enable or disable the on-demand service.
Queue Selection	Select: • Specific Queue — To map the service to process the batch jobs associated with the below-selected queue. • All except associated queues — To map the service to process the batch jobs of all the queues except the ones mapped under the specific queue option. Queue Selection field is only visible when the On-Demand toggle is disabled.

Field	Description
Queue Name	This option gets enabled when you select “Specific Queue” under Queue Selection or when the On-Demand toggle is enabled. Select the queue name using the dropdown.
Attributes	Enable Autoscaling — Turn on the toggle to enable automatic service scaling.

3. Click **WhatsApp Channel Details** to open the related tab, or click **Next**.
4. Refer to the below table to specify details in the given fields:

Field	Description
Channel Name	Select the channel using the dropdown. OR Click the add icon ⊞ to create a WhatsApp channel.
Sender Email ID	Displays the sender's email ID of the selected WhatsApp channel.
IP Address / Hostname	Displays the IP address or hostname of the selected WhatsApp channel.
Port	Displays the port number of the selected WhatsApp channel.
Connection Type	Displays the connection type of the selected WhatsApp channel.

5. Click **Create** to finalize WhatsApp service.

Creating message service

To create a message service, follow the below steps:

1. Click **+New Service > Message**. The Create Message Service dialog appears, displaying the Basic Details tab by default..
2. Refer to the below table to specify details in the given fields:

Field	Description
Service Name	Enter the name of the service.
Sleep Interval	Specify the sleep interval (in seconds) for the service to remain idle before its next execution cycle.
On-Demand Mail	Toggle the switch to enable or disable the on-demand service.

Field	Description
Scheduled Daily	Turn on the toggle to enable daily message service.
Daily Starting at	This option gets enabled when you turn on the Scheduled Daily toggle. Set the service start time in a 24-hour format.
Daily Ending at	This option gets enabled when you turn on the Scheduled Daily toggle. Set the service start time in a 24-hour format.
Queue Selection	Select: • Specific Queue — To map the service to process the batch jobs associated with the below-selected queue. • All except associated queues — To map the service to process the batch jobs of all the queues except the ones mapped under the specific queue option. Queue Selection field is only visible when the On-Demand toggle is disabled.
Queue Name	This option gets enabled when you select “Specific Queue” under Queue Selection or when the On-Demand toggle is enabled. Select the queue name using the dropdown.
Attributes	Enable Autoscaling — Turn on the toggle to enable automatic scaling of the service.

3. Click **Create** to finalize the message service.

Creating X service

To create an X service, follow the below steps:

1. Click **+New Service > X**. The Create X Service dialog appears, displaying the Basic Details tab by default..
2. The Basic Details tab appears by default. Refer to the below table to specify details in the given fields:

Field	Description
Service Name	Enter the name of the service.
Sleep Interval	Specify the sleep interval (in seconds) for the service to remain idle before its next execution cycle.

Field	Description
Scheduled Daily	Turn on the toggle to enable daily X service.
Daily Starting at	This option gets enabled when you turn on the Scheduled Daily toggle. Set the service start time in a 24-hour format.
Daily Ending at	This option gets enabled when you turn on the Scheduled Daily toggle. Set the service start time in a 24-hour format.
On-Demand	Toggle the switch to enable or disable the on-demand service. It is always enabled in the case of X microservice.
Queue Name	This option gets enabled when you select Specific Queue under Queue Selection or when the On-Demand toggle is enabled. Select the queue name using the dropdown.
Attributes	Enable Autoscaling — Turn on the toggle to enable automatic service scaling.

3. Click **X Channel Details** to open the related tab or click **Next**.
4. Refer to the below table to specify details in the given fields:

Field	Description
Channel Name	Select the channel using the dropdown. OR Click the add icon ⊞ to create X channel.
Social Connector URL	Displays the URL of the selected Facebook channel.

5. Click **Create** to finalize the X service.

Creating Facebook service

To create a Facebook service, follow the below steps:

1. Click **+New Service > Facebook**. The Create Facebook Service dialog appears, displaying the Basic Details tab by default.
2. Refer to the below table to specify details in the given fields:

Field	Description
Service Name	Enter the name of the service.

Field	Description
Sleep Interval	Enter the interval (in seconds) for which the service runs.
Scheduled Daily	Turn on the Scheduled Daily toggle to enable daily Facebook service.
Daily Starting at	This option gets enabled when you turn on the Scheduled Daily toggle. Select when the Facebook service starts in 24hr format.
Daily Ending at	This option gets enabled when you turn on the Scheduled Daily toggle. Select when the Facebook service ends in 24hr format.
On-Demand	Turn on the On-Demand toggle to enable on-demand mail. It is always enabled in the case of Facebook microservice.
Queue Name	This option gets enabled when you select Specific Queue under Queue Selection or when the On-Demand toggle is enabled. Select the queue name using the dropdown.
Attributes	Enable Autoscaling — Turn on the toggle to enable automatic service scaling.

3. Click **Facebook Channel Details** to open the related tab, or click **Next**.
4. Refer to the below table to specify details in the given fields:

Field	Description
Channel Name	Select the channel using the dropdown. OR Click the add icon ⊞ to create facebook channel.
Social Connector URL	Displays the URL of the selected Facebook channel.

5. Click **Create** to finalize the Facebook service.

Starting or stopping service

The services tab allows you to start or stop a service.

To start or stop a service, follow the below steps:

1. Hover over the name of the required service in the available list.
2. Click:

- Play icon — to start a stopped service.
- Pause icon — to stop a running service.

Editing service details

To edit details of a service, follow the below steps:

1. Hover over the name of the required service in the available list.
2. Click the horizontal ellipses icon .
3. Select **Edit Details**. A dialog with the service details appears.
4. Make the required changes.
5. Click **Save** to confirm the changes made to the app server.

You cannot edit the name of the service.

Creating copy of service

The services tab allows you to create a copy of an existing service alongwith all its properties.

To create copy of a service, follow the below steps:

1. Hover over the name of the required service in the available list.
2. Click the horizontal ellipses icon .
3. Select **Create a copy**. The Create Copy dialog appears.
4. Enter the **Service Name**.
5. Click **Create** to confirm the creation of a copy of the selected service.

Deleting service

To edit the details of a service, follow the below steps:

1. Hover over the name of the required service in the available list.
2. Click the horizontal ellipses icon .
3. Select **Delete**. The Delete Service dialog appears.
4. Click **Delete** to confirm the changes made to the app server.

You cannot delete a running service. Start by stopping the service, then try to delete it.

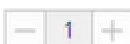
Best Practices:

- You can create different services to handle generation, mailing, archival, and other functionalities.
- You can handle Service Name, Check Interval, and App Server Details (such as App Server IP address, App Server Type, and App Server Port) parameters using OmniOMS Services.

Creating concurrent services

This feature allows you to process multiple threads concurrently. You can run between 1 and 99 threads at a time. Adjust the number of threads by typing a value or using the + and - buttons. This tab is only visible for microservices.

To create a concurrence service, follow the below steps:

1. Hover over to the required service in the microservice list.
2. Click on 

to increase or decrease the services you want to process.

The microservice must be in the start state to increase or decrease the concurrent services.

Configuration tab

This chapter provides information on the configuration tab present in OmniOMS Admin Workspace. The tab does not appear by default, click **Configuration** in the menu bar to open it.

It allows you to create, modify, and delete channels, app servers, and sites, and manage trackers, authentication, and configuration."

The Configuration tab contains the following subtabs:

- Connection
- Sites
- Trackers
- DB Datasource
- Mail Configuration
- URL Shortening
- Marvin
- Cabinet-level Settings
- License Details
- Others

Connections

The Connections sub-tab appears by default. It is useful for creating, managing, and deleting channels and application servers.

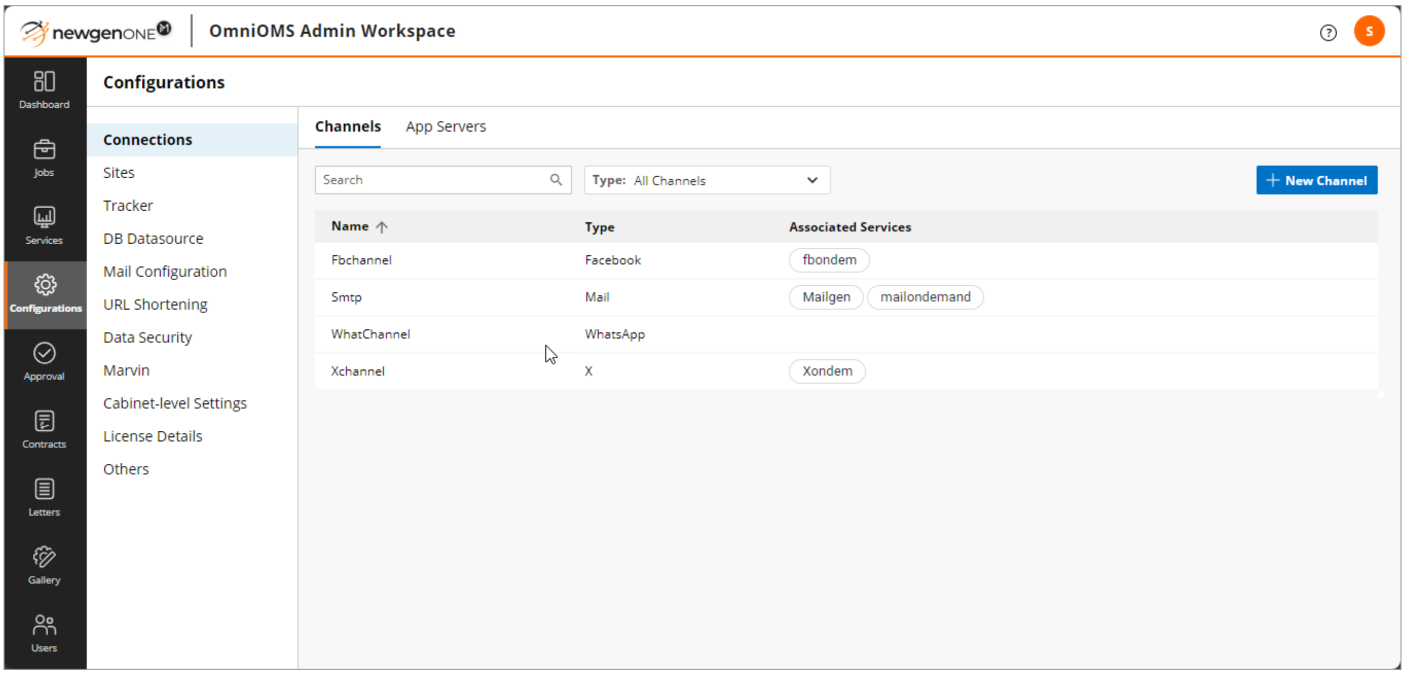
The connection tab consists of two sub-tabs:

- Channels
- App Servers

Channels

The Channel subtab appears by default. The tab allows you to create, edit, and delete different channels.

- Use the search bar to search channels by name.
- Use the **Type** drop-down to sort the list by channel type.



Creating channel

To create a channel, follow the below steps:

1. Click **+ New Channel**. A list of types of channels appears.
2. Select:
   - Mail — to register a Mail channel
   - Archival — to register an Archival channel
   - Bounce Mail — to register a Bounce Mail Channel
   - WhatsApp — to register a WhatsApp channel
   - X — to register an X channel
   - Facebook — to register a Facebook channel

Creating a mail channel

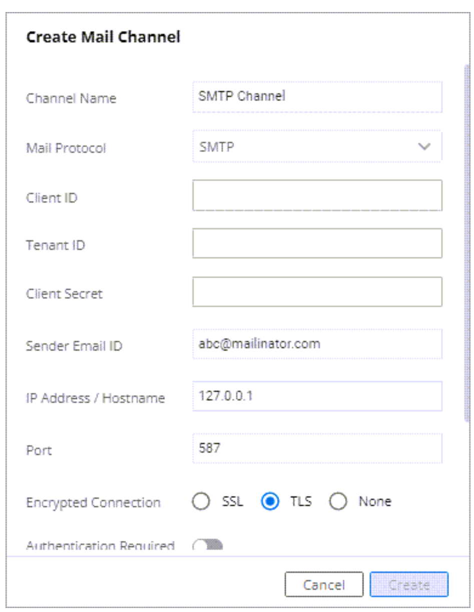
A mail channel refers to the communication channel utilized for customer interactions and communications through email addresses.

To create a mail channel, follow the below steps:

1. Click **+New Channel > Mail**. The Create Mail Channel dialog appears.
2. Refer to the below table to specify details in the given fields:

Field	Description
Channel Name	Enter the name of the Mail channel.
Mail Protocol	Select the type of mail protocol. The available options are: • SMTP • Office 365 — The Client ID, Tenant ID, and Client Secret fields get enabled in the case of Office 365 only.
Client ID	Enter the client ID of Office 365 account.
Tenant ID	Enter the tenant ID of Office 365 account.
Client Secret	Enter the Client Secret of Office 365 account. When the parameter SecretManager is set to Y in the AdminConfig.ini file and the mail protocol is selected as Office 365, this field appears disabled. In this case, the system automatically retrieves the Client Secret value from the AWS Secret Manager, eliminating the need for manual input. For more information, refer to the *NewgenONE OmniOMS 12.0 Administration Guide*.
Sender Email ID	Enter the email ID of the sender configured for the Mail server.
IP Address / Hostname	Enter the IP address or hostname of the Mail server.
Port	Enter the port number of the Mail server.

Field	Description
Encrypted Connection	Select the encrypted connection protocol: • SSL (Secure Socket Layer) • TLS (Transport Layer Security) • None
Authentication Required	Turn on the Authentication Required toggle to make authentication mandatory.
User Name	Enter the user name.
Password	Enter the password for the specified user. When the parameter SecretManager is set to Y in the AdminConfig.ini file and the mail protocol is selected as SMTP, this field appears disabled. In this case, the system automatically retrieves the Account Password value from the AWS Secret Manager, eliminating the need for manual input. For more information, refer to the *NewgenONE OmniOMS 12.0 Administration Guide*.
Test Connection and Connection Status	Click **Test Connection** to test the status of the connection to the channel. The Connection status appears, that is, either, success or failure. For the completion of the Mail channel creation, the test connection must be successful.



3. Click **Create** to complete the Mail channel creation.

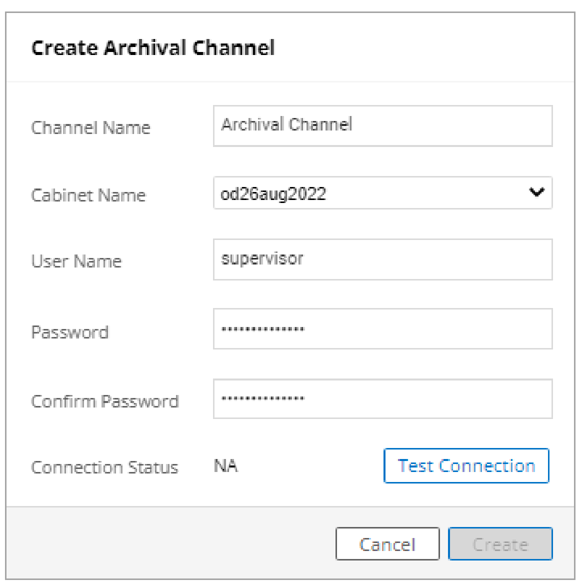
Creating an archival channel

An archival channel refers to a dedicated channel or repository used for storing and managing customer communications in a secure and organized manner.

To create an archival channel, follow the below steps:

1. Click **+New Channel > Archival**. The Create Archival Channel dialog appears.
2. Refer the below table to specify details in the given fields:

Field	Description
Channel Name	Enter the name of the archival channel.
Cabinet Name	Select the archival cabinet name using dropdown.
User Name	Enter the user name.
Password	Enter the password of the specified user.
Confirm Password	Re-enter the password to confirm.
Test Connection and Connection Status	Click the Test Connection option to test the status of connection to the channel. The Connection status appears, Success or Failure. For the completion of the Archival channel creation, the test connection must be successful.



3. Click **Create** to complete the Archival channel creation.

Creating a bounce mail channel

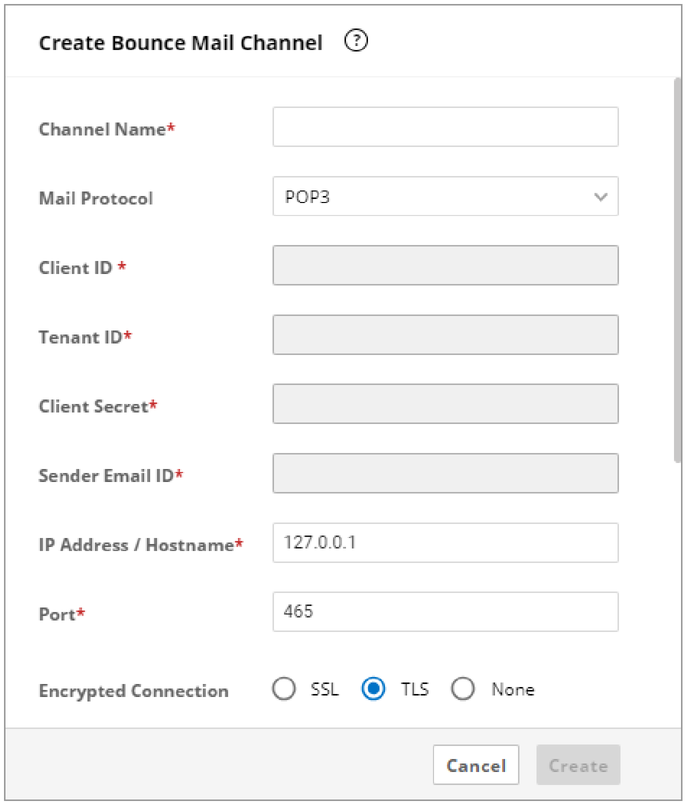
A bounce mail channel refers to a communication channel that handles bounced or undelivered communications.

To create a bounce mail channel, follow the below steps:

1. Click **+New Channel > Bounce Mail**. The Create Bounce Mail Channel dialog appears.
2. Refer the below table to specify details in the given fields:

Field	Description
Channel Name	Enter the name of the bounce mail channel.
Mail Protocol	Select the type of mail protocol. The available options are: • POP3 • IMAP • Office 365 — The Client ID, Tenant ID, Client Secret, and Sender Email ID fields get enabled in the case of Office 365 only.
Client ID	Enter the client ID of the Office 365 account.
Tenant ID	Enter the tenant ID of the Office 365 account.
Client Secret	Enter the Client Secret of the Office 365 account. When the parameter SecretManager is set to Y in the *AdminConfig.ini* file and the mail protocol is selected as Office 365, this field appears disabled. In this case, the system automatically retrieves the Client Secret from the AWS Secret Manager, eliminating the need for manual input. For more information, refer to the *NewgenONE OmniOMS 12.0 Administration Guide*.
Sender Email ID	Enter the email ID of the sender configured for the bounce mail server.
IP Address / Hostname	Enter the IP address or hostname of the bounce mail server.
Port	Enter the port number of the bounce mail server.

Field	Description
Encrypted Connection	Select the encrypted connection protocol: • SSL (Secure Socket Layer) • TLS (Transport Layer Security) • None
Authentication Required	Turn on the Authentication Required toggle to make authentication mandatory.
User Name	Enter the user name.
Password	Enter the password of the specified user. When the parameter SecretManager is set to Y in the AdminConfig.ini file and the mail protocol is selected as POP3 or IMAP, this field appears disabled. In this case, the system automatically retrieves the Account Password from the AWS Secret Manager, eliminating the need for manual input. For more information, refer to the *NewgenONE OmniOMS Administration Guide*.
Mail Filter	Enter filter criteria for the mails. Separate the values with commas or enter them on separate lines.
Test Connection and Connection Status	Click the Test Connection option to test the status of connection to the channel. The Connection status appears, Success or Failure. For the completion of the Bounce mail channel creation, the test connection must be successful.



3. Click **Create** to complete the Bounce mail channel creation.

Creating a WhatsApp channel

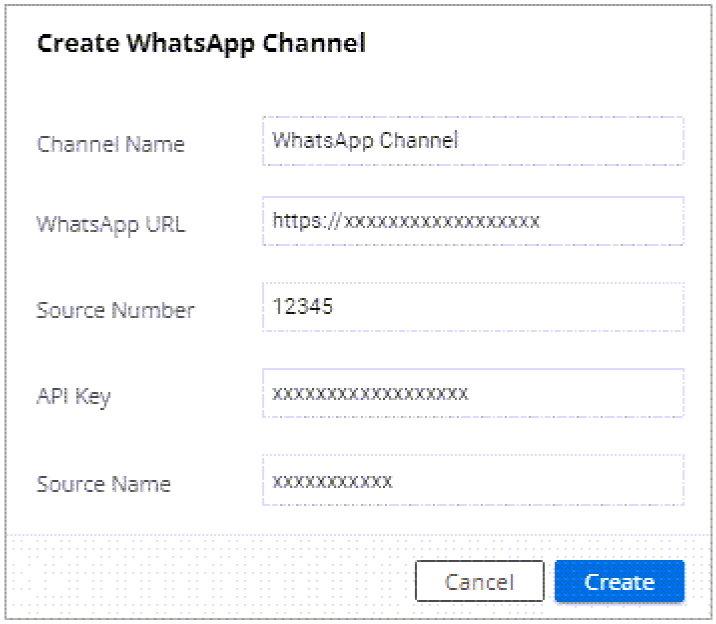
A WhatsApp channel refers to a communication channel that utilizes the WhatsApp platform to facilitate customer interactions and communications.

To create a WhatsApp channel, follow the below steps:

1. Click **+New Channel > WhatsApp**. The Create WhatsApp Channel dialog appears.
2. Refer to the below table to specify details in the given fields:

Field	Description
Channel Name	Enter the name of the WhatsApp channel.
WhatsApp URL	Enter the configured WhatsApp URL.
Source Number	Enter the source number.
API key	Enter the Application Programming Interface (API) key to authenticate the source.

Field	Description
Source Name	Enter the name of the source.



3. Click **Create** to complete the WhatsApp channel creation.

Creating X channel

An X channel is a communication channel that utilizes the X social platform strengths to enhance customer communication while maintaining efficiency, personalization, and support across channels.

To create a mail channel, follow the below steps:

1. Click **+New Channel > X**. The Create X channel dialog appears.
2. Refer to the below table to specify details in the given fields:

Fields	Description
Channel Name	Enter the name of the X channel.
Social Connector URL	Enter the URL where the NewgenOneSocialConnector is deployed.

Fields	Description
Access Token	Enter the access token provided with your license purchase. For access token details, refer to Integrating Facebook or X channel section in *NewgenONE OmniOMS 12.0 Developer Guide*.
Connection status	Specify whether the connection is established if the details entered are valid. To check the status, click **Validate**.

3. Once the status is verified, click **Create** to complete creating the X channel.

Creating Facebook channel

A Facebook channel is a communication channel that uses Facebook's social platform strengths to enhance customer communication while maintaining efficiency, personalization, and support across channels.

To create a mail channel, follow the below steps:

1. Click **+New Channel > Facebook**. The Create Facebook Channel dialog appears.
2. Refer to the below table to specify details in the given fields:

Fields	Description
Channel Name	Enter the name of the Facebook channel.
Social Connector URL	Enter the URL where the NewgenOneSocialConnector is deployed.
Access Token	Enter the access token provided with your license purchase. For access token details, refer to the Integrating Facebook or X channel section in the *NewgenONE OmniOMS 12.0 Developer Guide*.
Connection status	Specify whether the connection is established if the details entered are valid. To check the status, click **Validate**.

3. Once the status is verified, click **Create** to complete creating the Facebook channel.

Editing channel details

To edit details of the channel, follow the below steps:

1. Hover over the name of the required channel in the available list.
2. Click the vertical ellipses icon ⋮.
3. Select **Edit Details**. A dialog with the channel details appears.
4. Make the required changes.
5. Click **Save** to confirm the changes made to the details.

Testing channel status

To test channel status, follow the below steps:

1. Hover over the name of the required channel in the available list.
2. Click the vertical ellipses icon ⋮.
3. Select **Test Channel Status**. In case of:
   - Successful testing — “Channel tested successfully” toast appears.
   - Unsuccessful testing — “Channel testing failed” toast appears.

Deleting channel

To delete a channel, follow the below steps:

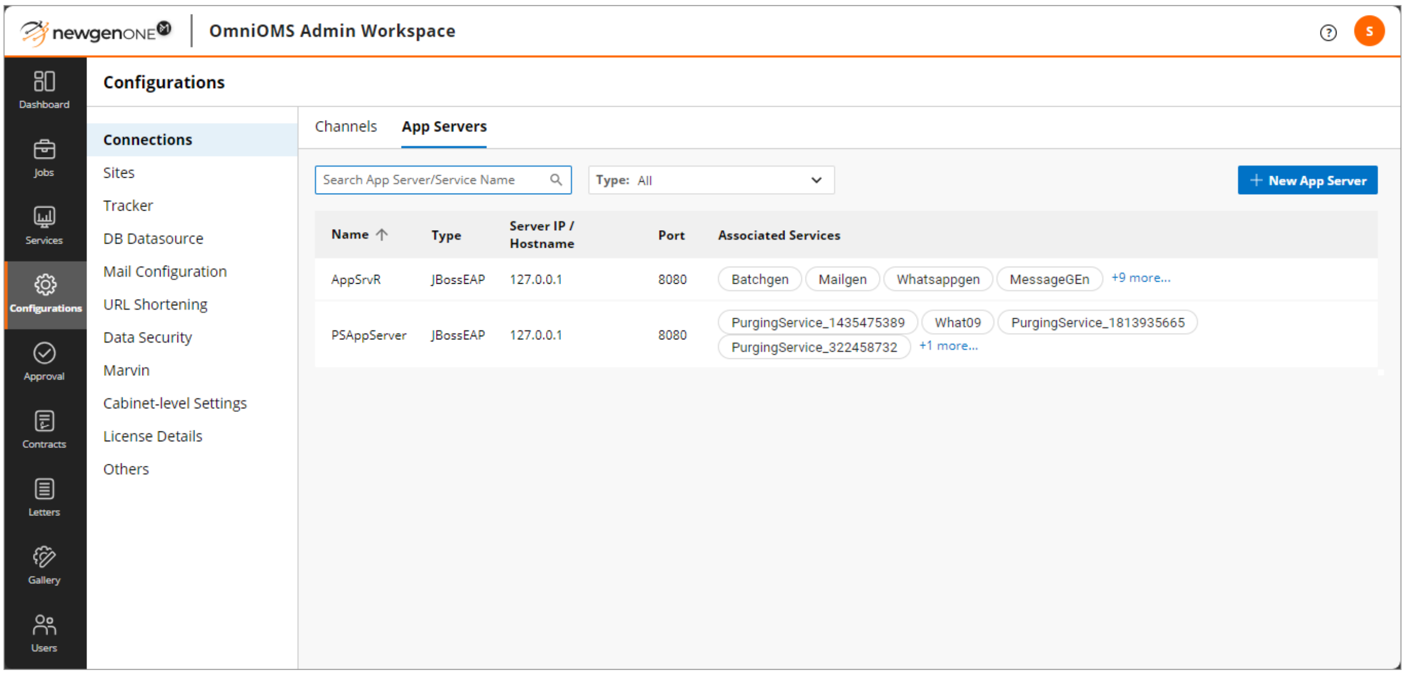
1. Hover over the name of the required channel in the available list.
2. Click the vertical ellipses icon ⋮.
3. Select **Delete**. The Delete Channel dialog appears.
4. Click **Delete** to confirm the deletion of the channel.

> You cannot delete a channel associated with a service.

App servers

Click **Trackers** to open the related subtab. Use the App Servers tab to create, edit, and delete an application server.

- Use the search bar to search app server or service by name.
- Use the **Type** dropdown to sort the list by app server type.



Creating app server

To create an application server, follow the below steps:

1. Click **+ New App Server**. The Create App Server dialog appears.
2. Refer the below table to specify details in the given fields:

Field	Description
Name	Enter the name of the application server.
Type	Select the type of application server: • JBoss EAP • WebLogic • WebSphere

Field	Description
Server IP / Hostname	Enter the IP address or hostname of the application server.
Port	Enter the port number of the selected application server.

3. Click **Create** to complete the creation of app server.

Editing app server details

To edit details of an application server, follow the below steps:

1. Hover over the name of the required app server in the available list.
2. Click the horizontal ellipses icon •••.
3. Select **Edit Details**. A dialog with the app server details appears.
4. Make the required changes.
5. Click **Save** to confirm the changes made to the app server.

You cannot edit the name of the app server.

Deleting app server

To delete an application server, follow the below steps:

1. Hover over the name of the required app server in the available list.
2. Click the horizontal ellipses icon •••.
3. Select **Delete**. The Delete App Servers dialog appears.
4. Click **Delete** to confirm the deletion of app server.

Sites

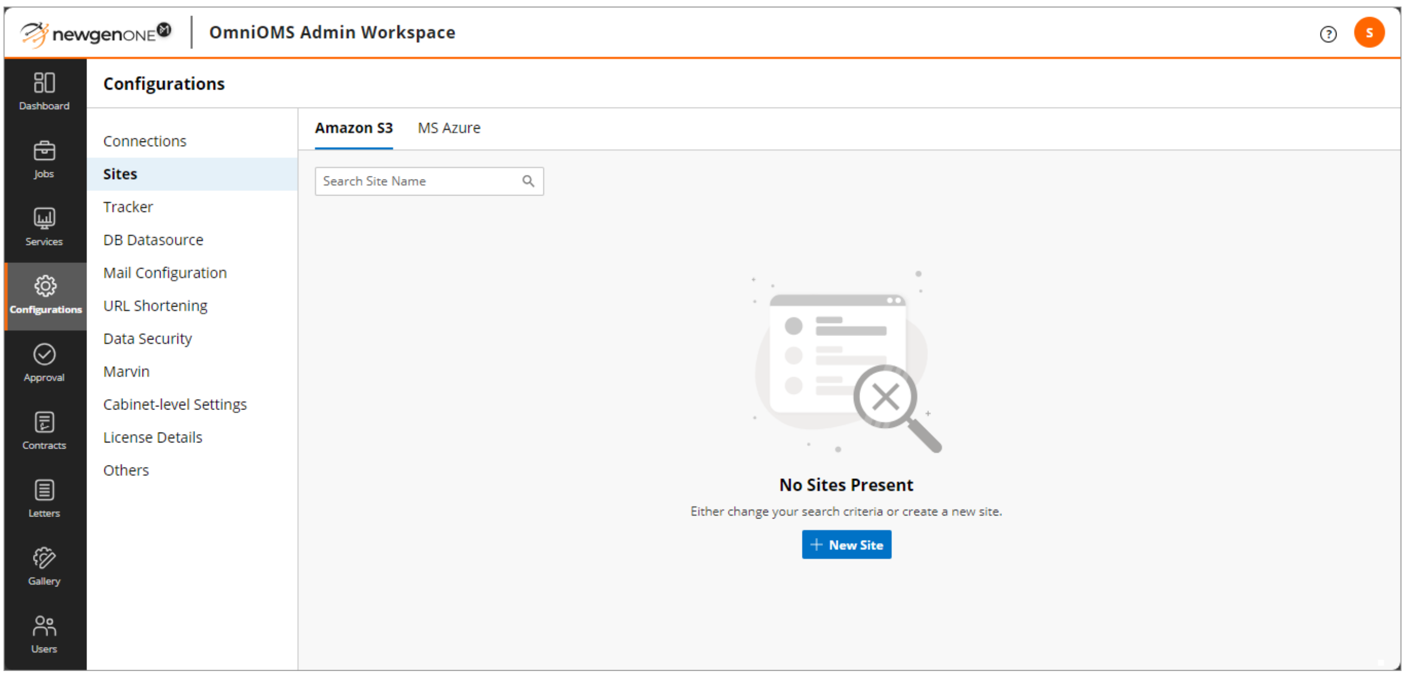
The sites tab provides information about the list of sites integrated with **Amazon S3** or **MS Azure** bucket. It also facilitates the storage of the generated communications in **Amazon S3** or **MS Azure**.

The Sites tab consist of two sub-tabs that are Amazon S3 and MS Azure.

Amazon S3

Click **Amazon S3 Sites** to open the related subtab. It facilitates storage of the generated communications in Amazon S3 buckets. A list of sites integrated with Amazon S3 bucket appears under this tab. OmniOMS Composition Designer uses the Amazon S3 sites (created in the Admin Workspace) in the Jobs. Use the Amazon S3 sites tab to create, edit, and delete sites.

Use the search bar to search the site by name.



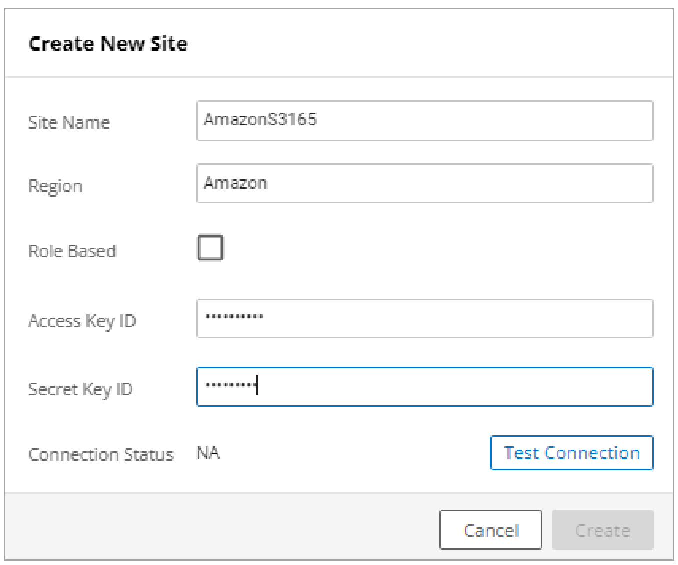
Creating Amazon S3 site

To create a new Amazon S3 site, follow the below steps:

1. Click **+ New Site**. The Create New Site dialog appears.
2. Refer the below table to specify details in the given fields:

Field	Description
Site Name	Enter the name of the site that you want to associate with Amazon S3 bucket.

Field	Description
Region	Enter the name of region to which you want to associate the site to.
Role Based	Select the Role based support checkbox to enable access to S3 buckets in the configured sites without using access and secret key ID. If selected, Access Key ID and Secret Key ID appears disabled.
Access Key ID	Enter the access key ID.
Secret Key ID	Enter the secret key ID.
Test Connection and Connection Status	Click the Test Connection option to test the status of connection to the site. The Connection status appears, that is, either, Success or Failure. To complete the creation of the Amazon S3 site, it is mandatory to have a successful test connection.



3. Click **Create** to complete the creation of the Amazon S3 site .

> To know how to integrate OmniOMS with Amazon S3 and MS Azure sites, refer to the Integrating Amazon S3 and MS Azure sites section in *NewgenONE OmniOMS Composition Designer User Guide*.

Editing Amazon S3 site details

To edit details of the site, follow the below steps:

1. Hover over the name of the required site in the available list.

2. Click the horizontal ellipses icon ⋯.
3. Select Edit Details. A dialog with site details appears.
4. Make the required changes.
5. Click **Save** to confirm the changes made to the Amazon S3 site.

Testing connection to Amazon S3 site

To test the connection of the site, follow the below steps:

1. Hover over the name of the required site in the available list.
2. Click the horizontal ellipses icon ⋯.
3. Select **Test Connection**. In case of:
   - Successful connection — Test connection successful toast appears.
   - Unsuccessful connection — Test connection failed toast appears.

Deleting Amazon S3 site

To delete a site, follow the below steps:

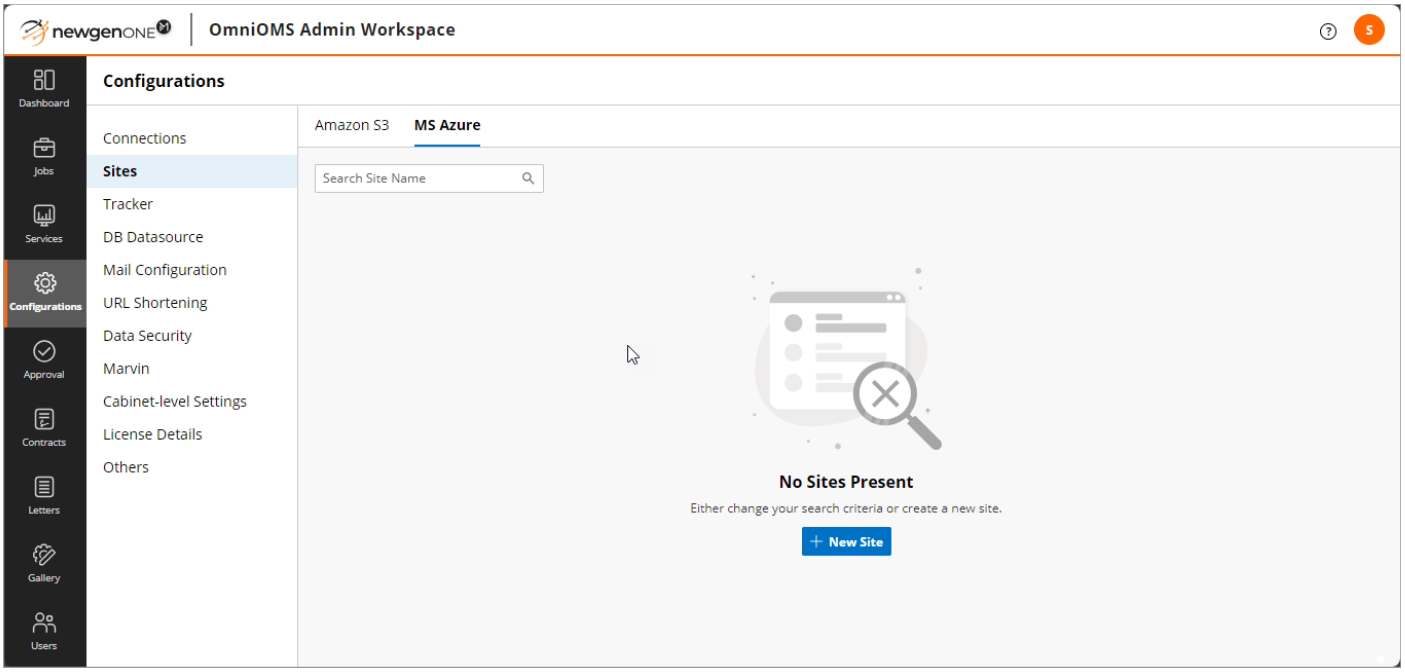
1. Hover over the name of the required site in the available list.
2. Click the horizontal ellipses icon ⋯.
3. Select **Delete**. The Delete Site dialog appears.
4. Click **Delete** to confirm the deletion of Amazon S3 site.

> You cannot delete a site associated with a job.

MS Azure

Click **MS Azure Sites** to open the related subtab. It facilitates the storage of the generated communications in MS Azure. A list of sites integrated with MS Azure appears under this tab. OmniOMS Composition Designer uses the MS Azure sites (created in the Admin Workspace) in the jobs.

- Use the MS Azure Sites subtab to create, edit, and delete sites.
- Use the search bar to search the site by name.

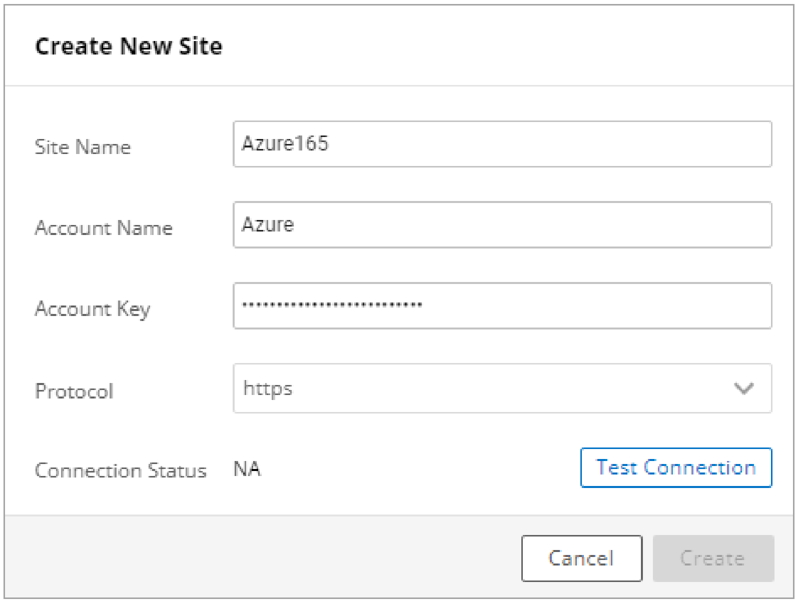


Creating MS Azure site

To create a new MS Azure site, follow the below steps:

1. Click **+ New Site**. The Create New Site dialog appears.
2. Refer the below table to specify details in the given fields:

Field	Description
Site Name	Enter the name of the site that you want to associate.
Account Name	Enter the account name of the Azure Blob storage.
Account Key	Enter the account key of the Azure Blob storage.
Protocol	Select the required protocol. The available options are: • https • http
Test Connection and Connection Status	Click the “Test Connection” option to test the status of connection to the site. The Connection status appears, “Success” or “Failure”. In order to complete the creation of a MS Azure site, it is mandatory to have a successful to test connection.



3. Click **Create** to complete the creation of the MS Azure site .

Editing MS Azure site details

To edit details of the site, follow the below steps:

1. Hover over the name of the required site in the available list.
2. Click the horizontal ellipses icon .
3. Select **Edit Details**. A dialog with site details appears.
4. Make the required changes.
5. Click **Save** to confirm the changes made to the MS Azure site.

Testing connection to MS Azure site

To test connection of the site, follow the below steps:

1. Hover over the name of the required site in the available list.
2. Click the horizontal ellipses icon .
3. Select **Test Connection**. In case of:
   - Successful connection — Test connection successful toast appears.
   - Unsuccessful connection — Test connection failed toast appears.

Deleting MS Azure site

To delete a site, follow the below steps:

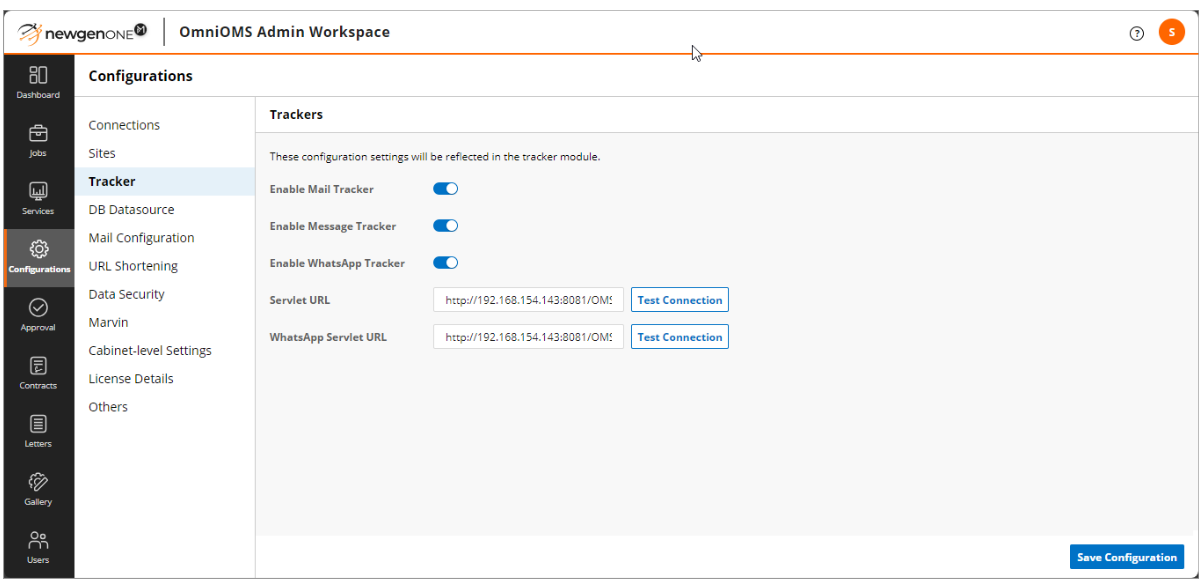
1. Hover over the name of the required site in the available list.
2. Click the horizontal ellipses icon •••.
3. Select **Delete**. The Delete Site dialog appears.
4. Click **Delete** to confirm the deletion of MS Azure site.

> You cannot delete a site associated with a job.

Trackers

Click **Trackers** to open the related subtab. It allows you to configure and enable mail, message, and WhatsApp trackers.

> To enable mail tracking, you must install JWS (JBoss Web Server) in your machine.



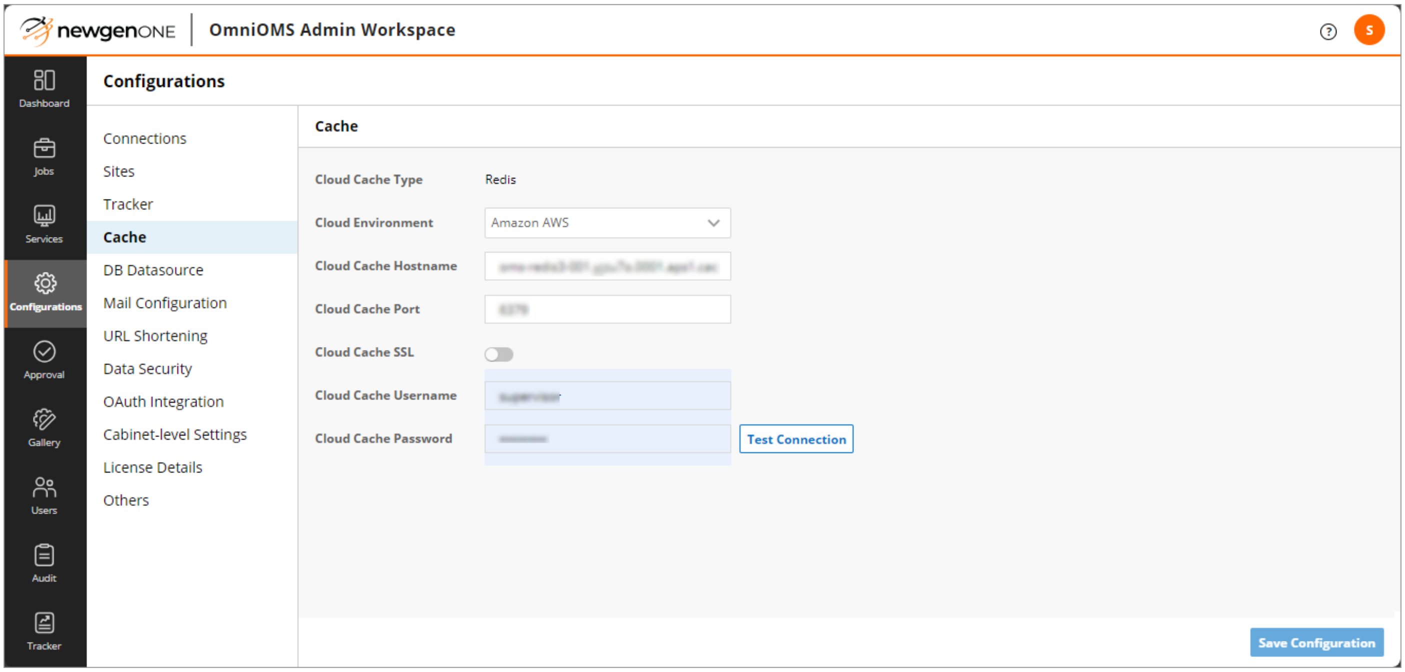
Field	Description
Enable Mail Tracker	Turn on the Enable Mail Tracker toggle to enable the mail tracker.
Enable Message Tracker	Turn on the Enable Message Tracker toggle to enable the message tracker.

Field	Description
Enable WhatsApp Tracker	Turn on the Enable WhatsApp Tracker toggle to enable the WhatsApp tracker.
Servlet URL	Enter the tracking server URL. Click Test Connection. In case of: • Successful connection — Tracking servlet tested successfully toast appears. • Unsuccessful connection — Connection failed. Please try again toast appears.
WhatsApp Servlet URL	Enter the WhatsApp tracking server URL. Click Test Connection. In case of: • Successful connection — Tracking servlet tested successfully toast appears. • Unsuccessful connection — Connection failed. Please try again toast appears.
Save Configuration	Click Save Configuration to save any changes made to the tracker configuration.

Cache

Click **Cache** to open the related subtab. It allows you to configure cloud cache support in OmniOMS Admin Workspace.

- To view this tab, you must set the value of the *isCloud* parameter as Y in the *OMSAdminConfig.ini*.
- In the case of cloud deployment, you must configure Cache to process the jobs.



The following table lists the options present in the Cache subtab:

Field	Description
Cloud Cache Type	Displays the Cloud Cache Type as Redis.
Cloud Environment	Select the cloud environment to setup Cache. The available options are: • Amazon AWS • MS Azure • OpenShift
Cloud Cache Hostname	Enter the hostname of the cloud cache environment.
Cloud Cache Port	Enter the port number of the cloud cache environment.
Cloud Cache SSL	Turn on the toggle to enable storing session IDs for SSL sessions.
Cloud Cache Username	Enter the username of the cloud cache environment.
Cloud Cache Password	Enter the password of the cloud cache environment.
Save Configuration	Click **Save Configuration** to save any changes made to the cache configuration. Before saving the configuration, testing the connection with the mentioned hostname and port is important. Click **Test Connection**.

DB Datasource

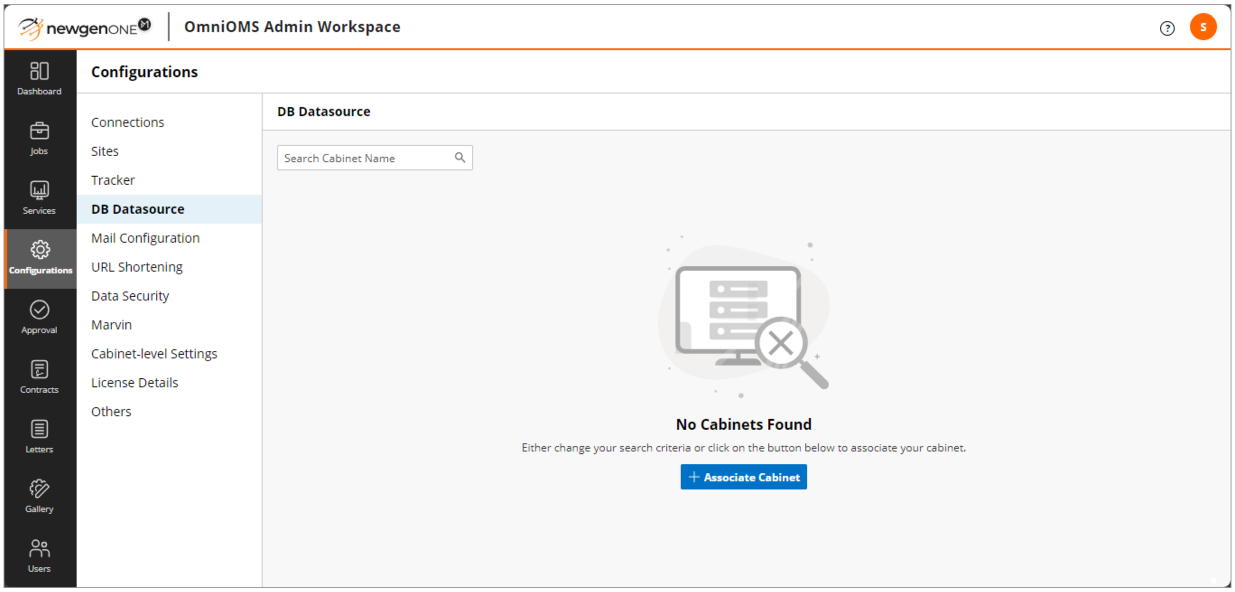
A database (DB) datasource is the connection between an application and a database, facilitating interaction, data retrieval, storage, and various operations within the application. It serves as a bridge, enabling seamless communication and transferring data between the software program and the underlying database.

The NewgenONE OmniOMS Admin Workspace enables you to associate the DB datasource (cabinet) with the one you are currently signed into. Once these DB datasource are associated, they become accessible when creating a dataset for an object in the Composition Designer module.

For example, you have signed into the NewgenONE OmniOMS Admin Workspace using the *sample1* database. Let's assume there are two external databases named *sample2* and *sample3* that you aim to link with the *sample1* databases. By navigating to the DB Datasource tab in the NewgenONE OmniOMS Admin Workspace, you can seamlessly associate *sample2* and *sample3* external databases with the *sample1* database. Once these associations are established, the NewgenONE OmniOMS Admin Workspace transforms into a streamlined hub, where the *sample1, sample2*, and *sample3* databases are interconnected. This configuration ensures that only relevant databases are prominently displayed while creating datasets in the Composition Designer module fostering a clutter-free environment for efficiently managing diverse datasource.

To access the DB Datasource tab, follow the below steps:

1. On the OmniOMS Admin Workspace home page, select **Connections** from the left navigation bar.
2. On the right pane, select **DB Datasource**.



The DB Datasource tab opens displaying the already associated databases, if any, or lets you perform the following operations:

- Associating a DB datasource
- Modifying details of a DB datasource
- Testing connection for a DB datasource
- Dissociating a DB datasource

  Additionally, you can search for an existing database using the **Search Cabinet Name** box.

Associating a DB datasource

You can associate a database with the one you are currently signed into, to create a dataset in the Composition Designer module.

Before associating a database in the NewgenONE OmniOMS Admin Workspace, ensure that you create the datasource for the database in your application server. To create a datasource, refer to the *Creating a datasource* section in the *NewgenONE OmniOMS Installation and Configuration Guide*.

To associate a database, follow the below steps:

1. On the DB Datasource tab, click **Associate Cabinet**. The Associate Cabinet dialog appears.
2. Specify the following fields:

Field	Description
Cabinet Name	Enter a database name to associate with the signed-in database. It is a mandatory field.

Field	Description
Database Type	To manage and organize the data in a structured format for the selected database, choose a database type from the following options: • MSSQL • Oracle • PostgreSQL • Azure It is a mandatory field.
Query Timeout	Specify the time, in seconds, after which any query running in a database through the application stops executing. You can specify a maximum of 300 seconds as a query timeout.

3. Click **Test Connection** to check the datasource configuration.
   In case of invalid entries for any of the above fields, the "Unable to find datasource configuration" error message appears.
4. Click **Associate**. The "Cabinet associated successfully" message appears. The associated database appears in the list of existing associated databases.

Related topic(s)

- Modifying an details of a DB datasource
- Testing connection for a DB datasource
- Dissociating a DB datasource

Modifying details of a DB datasource

You can modify the details of an associated database.

To modify the details of an associated database, follow the below steps:

1. On the DB Datasource tab, from the list of associated databases, hover over a specific database and click the **More Options** icon ... The list of permitted operations appears.
2. Select **Edit Details**. The Edit Associated Cabinet dialog appears.
3. Modify the database type or query timeout based on your requirements. For more details, see *step 2* in the Associating a cabinet section.

4. Click **Test Connection** to check the datasource configuration.
   In case of invalid entries of the database type or query timeout field, the "Unable to find datasource configuration" error message appears.
5. Click **Save**. The "Cabinet modified successfully" message appears.

Testing connection for a DB datasource

You can test the connection for a database to check the datasource configuration.

To test the connection for a database, follow the below steps:

1. On the DB Datasource tab, from the list of associated databases, hover over a specific database and click the **More Options** icon ⋯. The list of permitted operations appears.
2. Select **Test Connection**. If the provided database details are valid, the "Test connection successful" message appears. Otherwise, the "Unable to find datasource configuration" error message appears.

Dissociating a DB datasource

You can dissociate a database from the one you are currently signed into.

To dissociate a database, follow the below steps:

1. On the DB Datasource tab, from the list of associated databases, hover over a specific database and click the **More Options** icon ⋯. The list of permitted operations appears.
2. Select **Dissociate**. The Dissociate Cabinet dialog appears.
3. Click **Dissociate** to confirm. The "Cabinet dissociated successfully" message appears.

Configuring mail

The Mail Configuration tab allows you to perform the configure emails for the following functionalities:

- **Password set or reset emails** — This feature allows you to configure emails that contain a URL for setting or resetting passwords. These emails are sent to newly added users for password setup or existing users for password reset.
- **Status and action notifications** — During template baselining, you have the option to send status or action notifications through email to both the maker and checker of report templates.

For this feature to function, it is essential to enable the Generate Mail option during user creation. For more information, refer to the Creating a new user section.

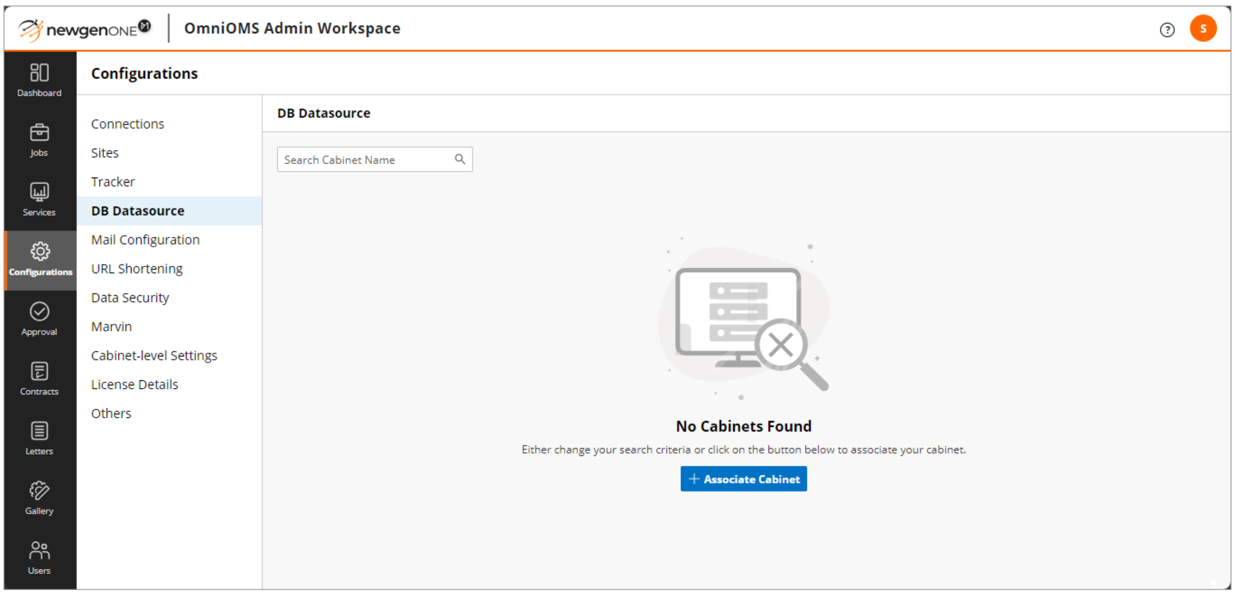
To configure the mails, follow the below steps:

1. Refer the below table to specify details in the given fields:

Field	Description
Mail Channel Details	
Channel Name	From the Channel Name dropdown, select the required SMTP channel to send the necessary emails. If the required channel is not available, you can create a new mail channel (SMTP) using the add icon ⊞. For procedural details on creating a mail channel, refer to the Creating a mail channel section. Once you select the mail channel, the following information appears based on the channel configuration: • Account Username — The username associated with the selected mail channel. • Connection Type — The type of connection used for the mail channel (for example: SSL or TLS). • Email ID — The email address associated with the selected mail channel. • Port — The port number used for the mail server connection. • Mail Server Address – The address of the mail server used for the selected channel.
Password Notifications – Configuration	
Mail Subject	Specify the subject for the email. This field is mandatory.

Field	Description
Mail Body	Specify the required email body. This field is mandatory. Ensure that the mail body includes the <USER> and <URL> tags. These tags are the placeholders that get replaced with the appropriate values when the email is sent. The <USER> tag represents the username of the recipient to whom the mail is being sent, and the <URL> tag represents the URL for setting or resetting the password. If the mail body does not contain these tags, the system will generate an error indicating that the <USER> and <URL> tags are missing.

2. Click **Save Configuration**. The changes made to the mail configuration get saved.



URL shortening

This is a technique that allows you to create and add shorter and more manageable Uniform Resource Locators (URLs) to your reports. The purpose of URL shortening is to condense long and complex URLs into shorter ones. It enhances the shareability and aesthetics of the URL while maintaining its usability.

To configure URL shortening, follow the below steps:

1. Turn on the **Shorten URL** toggle.
2. From the **Shorten By** dropdown, select the required shortening service. The available options are:
   - **Bitly** —

a. In the **Access Key** field, specify the unique identifier or token that provides access to the Bitly API.
b. In the **URL** field, enter the specific URL of the Bitly API utilized for URL shortening within reports. For example, https://api-ssl.bitly.com/v4/shorten.

- **Others** — This option enables you to define custom API parameters for URL shortening when using services other than Bitly.
  Before configuring URL shortening parameters in the OmniOMS Admin Workspace, you must begin with writing an implementation class for the URL shortening service being utilized. For information on implementing a URL shortening service other than Bitly, refer to the *NewgenONE OmniOMS Developer Guide*.
  a. In the **Key and Value** fields, specify all the required parameters, one after another needed to call and execute the URL shortening service.
  b. Click the check icon ✓. The parameter gets added.
  Click **+ New Parameter** to specify additional parameters for configuring URL shortening.

3. Click **Test Connection** to verify the connection with the URL shortening service using the specified parameters.
4. After the successful test connection, click **Save Configuration**. The URL shortening configuration gets saved.

Data security

The data security tab provides the functionality of encrypting the cabinet directly from the NewgenONE OmniOMS Admin Workspace. It also allows you to update the existing encryption settings if required.

To encrypt the new cabinet, follow the below steps:

1. On the Configurations page, navigate to the **Data Security** tab.
2. Enter the following information in the corresponding fields:

Fields	Description
Key management service	Select the service from the drop-down.
Access key	Enter the access key that you set for cabinet.
Secret key	Enter the secret key for the encryption of data in cabinet.

Fields	Description
Service URL	Enter the URL for the service.
ACS key strength	Select any one 128 or 256 strength.

3. Click **Save Configuration**, to save the details.

Marvin

Once you register NewgenONE Marvin, you can configure its engine settings in the Marvin tab. These configuration settings include the engine name, model name, secret key, and engine URL.

The Marvin tab is only visible after successfully registering NewgenONE Marvin in the Others tab. For more information, see Registering NewgenONE Marvin.

To configure NewgenONE Marvin settings, follow the below steps:

1. On the Configurations page, navigate to the **Marvin** tab.
2. Turn on the **Enable Marvin** toggle to use the NewgenONE Marvin feature in Communication Designer.
3. Enter the following information in the corresponding fields:

Field	Description
Engine	It refers to the set of OpenAI text generation models.
Model	It refers to the OpenAI text generation model name. Select the required model name from the dropdown list.
Secret Key	It refers to the secret key allowing the Communication Designer to use the OpenAI APIs to generate AI-based content.
Engine URL	It indicates the engine URL.

4. Click **Save Configuration**.
   If the engine settings are configured correctly, you can then use the NewgenONE Marvin feature in Communication Designer.

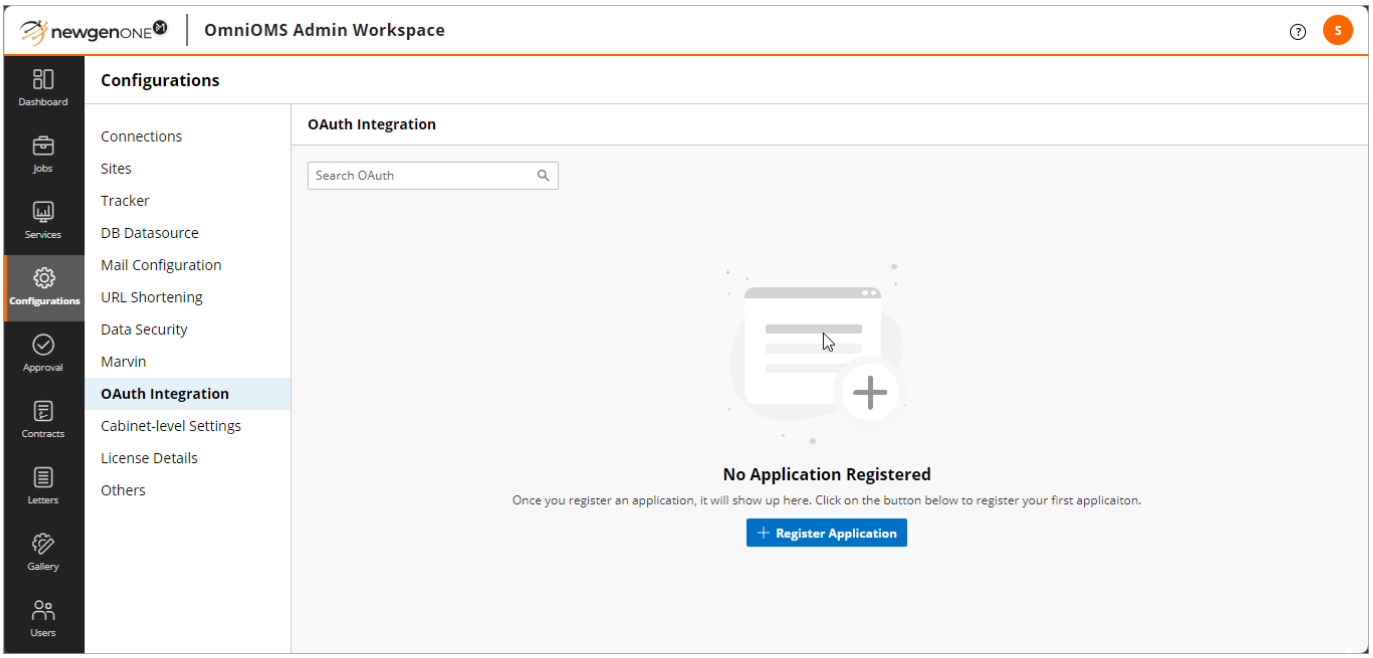
Related topic(s)

- Others

- Registering NewgenONE Marvin

Integrating OAuth

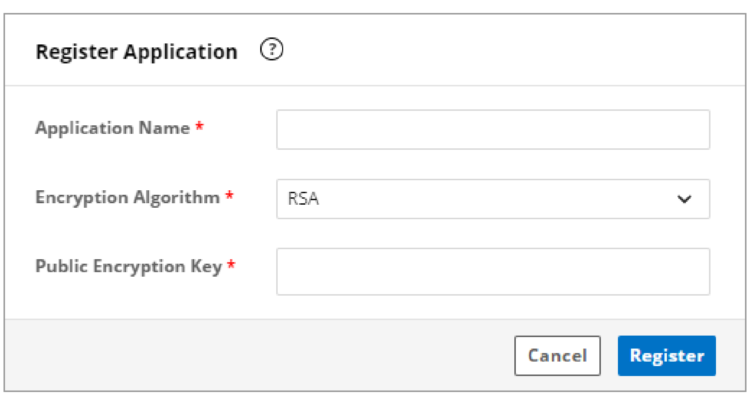
Once OAuth is enabled from the **Others** tab, you can register a new application or use the search bar to filter applications.



Register the application

To register an application, follow the below steps:

1. On the Configurations page, navigate to the **OAuth Integration** tab.
2. Click **+Register Application**. The register application pop-up appears.



3. Enter the following information in the corresponding fields:

Fields	Description
Application Name	Specify the name of the application that you want to register with OAuth.
Encryption Algorithm	Select the encryption algorithm from the dropdown.
Public Encryption Key	Enter the encryption key used for public decryption of data.

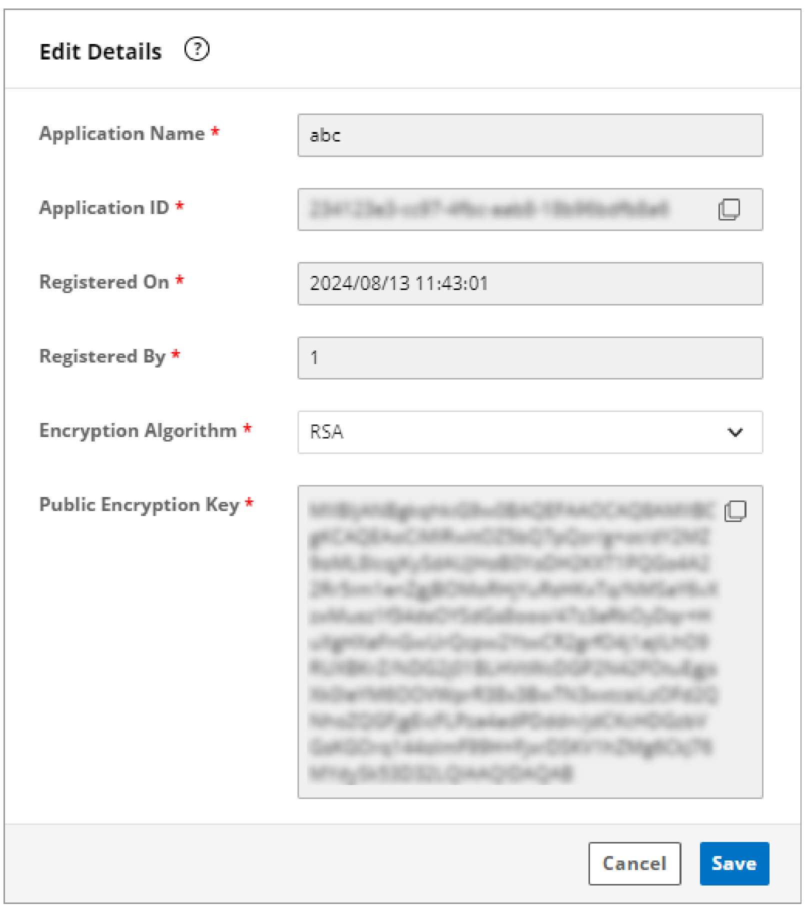
All fields marked with * are mandatory and must not be left empty.

4. Click **Register** to complete the application registration. A pop-up appears on successful registration of the application.

Edit the application

To edit the registered application, follow the below steps:

1. Hover over to the registered application and click on •••.
2. Click on **Edit Details**, edit details pop-up appears.

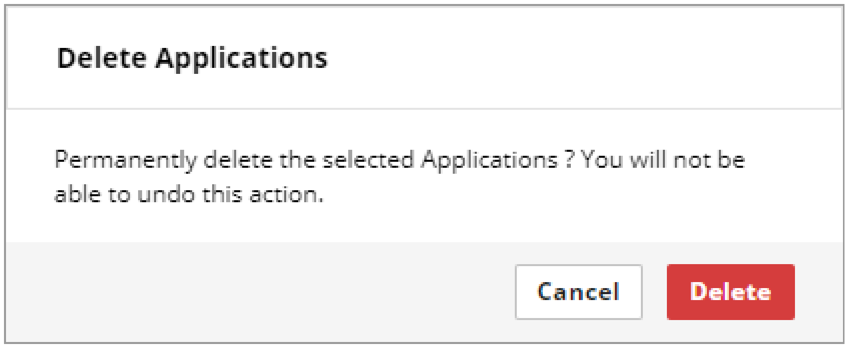


While editing the application details, you can only modify the encryption algorithm.

3. Click **Save** to save the details.

Delete the application

1. Hover over to the registered application and click the More Options icon.
2. Click **Delete**. The delete applications pop-up appears.



3. Click **Delete** to delete the application

Related topic(s)

- Others
- Configuring OAuth

Cabinet-level settings

The cabinet-level settings allow you to set application preferences based on your requirements.

Previously, these settings were configured using the *OMSAdminConfig.ini* file and deployed on the server. For more information, refer to the *NewgenONE OmniOMS Administration Guide*.

To configure the settings, follow the below steps:

1. On the Configurations page, go to the **Cabinet-level Settings** tab.
2. In the default section, enter the information in the corresponding fields:

Fields	Description
NewgenONEServerURL	Specify the NewgenONE server URL to provide or run approval using NewgenONE. For example, http:// 127.0.0.1:8080.

Fields	Description
PurgeFailedTime	Set the purge time for failed records (in days), or enter -1 to disable purging.
ChartServerURL	Specify the highcharts server URL. For example, http://127.0.0.1:8080.
EnableContract	It enables or disables the contract module in the admin workspace.
PurgeService	Specifies the state of working of the purging service. The PurgeService has the following values – • N - No Purging, • C - only Create Purge Service, • I - Only insert records for purging, • B - Create service and Purge • Records(C+I)
SaveFileForPreview	Specify the value as Y or N to save the file for previewing.
AuthTokenParser	Specifies the Auth Token Parser package name. It is applicable only if the Auth token is implemented in the custom layer.
PurgeDatabaseRecords	Specify the value as Y or N to purge the database records.
SleepTime	Specifies the sleep time in seconds for purging the generated communications.
MicroserviceURL	Specify the URL where the OmniOMS microservices are deployed. For example: https://<DomainName>/
PurgeFailedRecords	Specify Y or N to indicate whether you want to purge the failed records.
iBPSServerURL	Specify the iBPS server URL to provide or run approval workflow using iBPS. For example, *https://127.0.0.1:8080*

Fields	Description
PurgeTime	Specifies the time in seconds for purging the communications generated by OmniOMS. If PurgeTime = -1 then purging is disabled, If Purgetime >= 0 then purging is done for those communications which are older than the specified PurgeTime seconds.
EnableLetter	Enables or disables the Letters module in the Admin Workspace menu. • If EnableLetter = Y, then the Letters module is enabled in Admin Workspace. • If EnableLetter = N, then the Letters module is disabled in Admin Workspace.
SecretManager	When the value of SecretManager is set to Y, the username and password of OMSServices login get validated by the Secret Manager. Conversely, when the value of SecretManager is set to N, the username and password of the OMSServices login are validated from the *CSUsers.xml* file.

3. Click **Save Configuration** to save the details.

Additional configuration

This feature is used to create any extra configuration that you want to set for the INI parameters.

To create additional configuration, follow the below steps:

1. Click **+Additional Configuration**.
2. Enter the label name and the value you want to set for the parameter.
3. Click to set the label, or click to cancel, creating a parameter.

To edit the created parameter, follow the below steps:

1. Hover over to the parameter that you want to edit.
2. Click on , and update the label name or parameter value.
3. Click to save the updated details.

To delete the created parameter, follow the below steps:

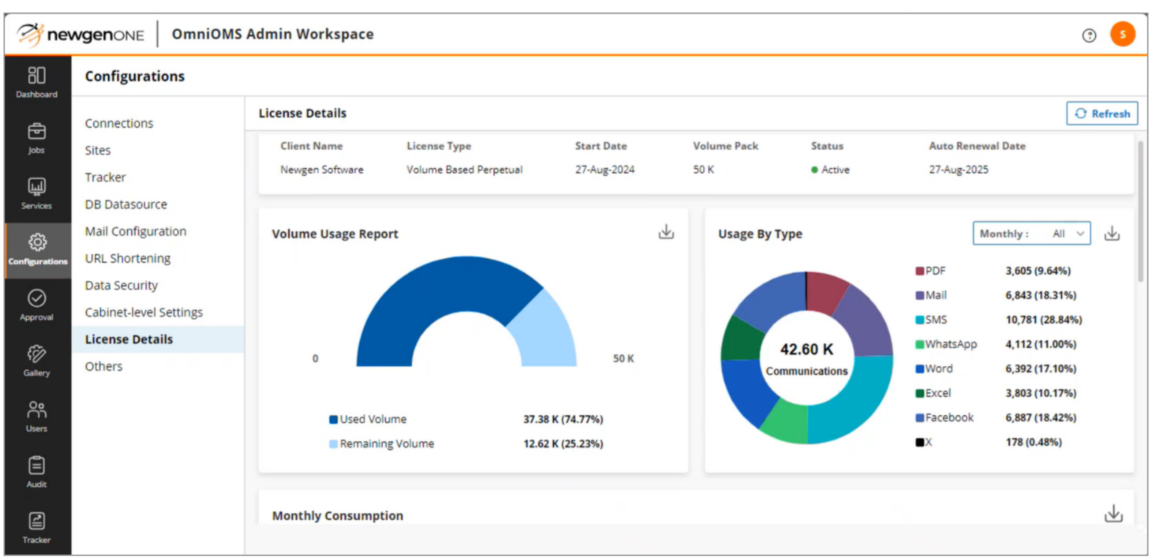
1. Hover over to the parameter that you want to delete.
2. Click to delete the created parameter.

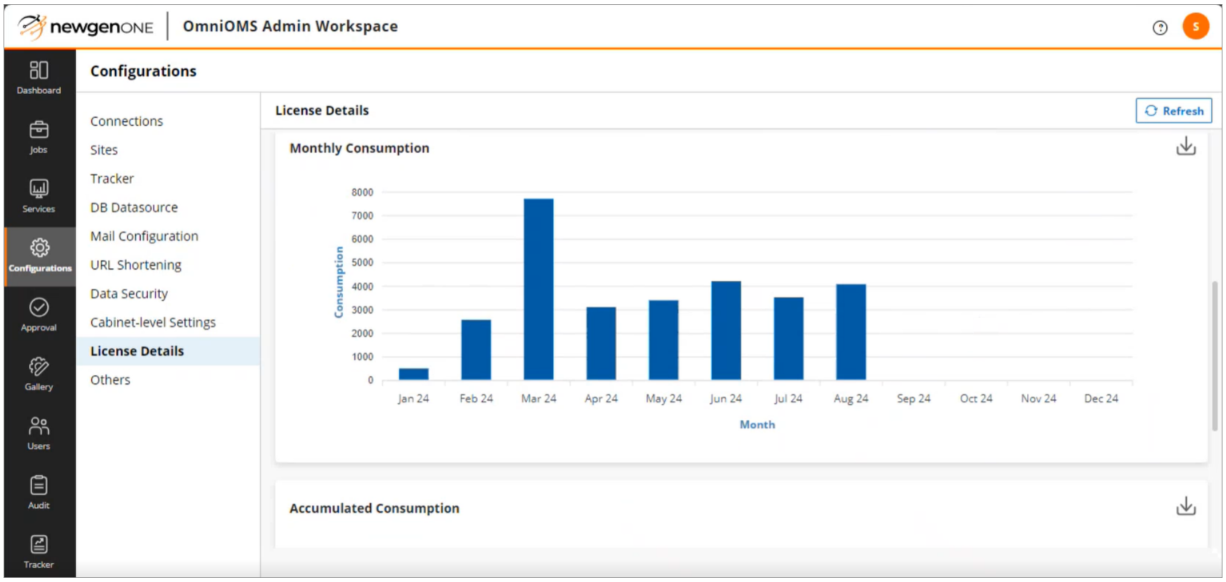
After creating, editing, or deleting the additional parameter, click **Save Configuration** to save the changes.

License Details

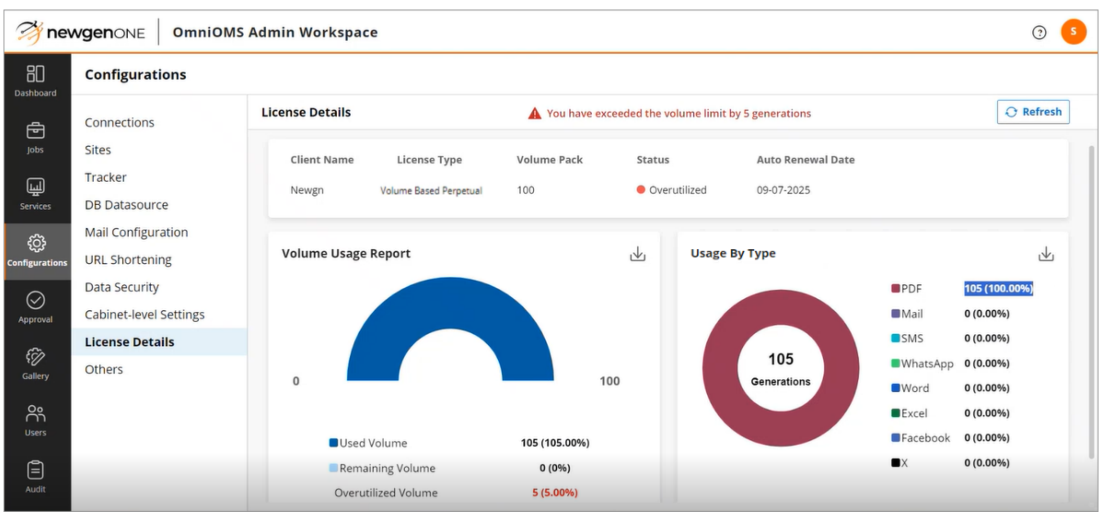
After you register your license key in the Others tab, the License Details tab displays information like client name, license type, start date, volume pack, status, and Auto-renewal date. It tracks the overall usage of the license in a graphical format and it also allows you to download the following reports:

1. **Volume Usage Report**: Specifies the information about how many records are processed from the total volume pack.
2. **Usage By Type**: Specifies the total number of records like PDFs, Mail, SMS, and all the other records.
3. **Monthly Consumption**: Specifies the total consumption of the license pack in a month.
4. **Accumulated Consumption**: Specifies the total consumption to date and predicts how much is consumed in the upcoming months.
   To download the above reports, click .





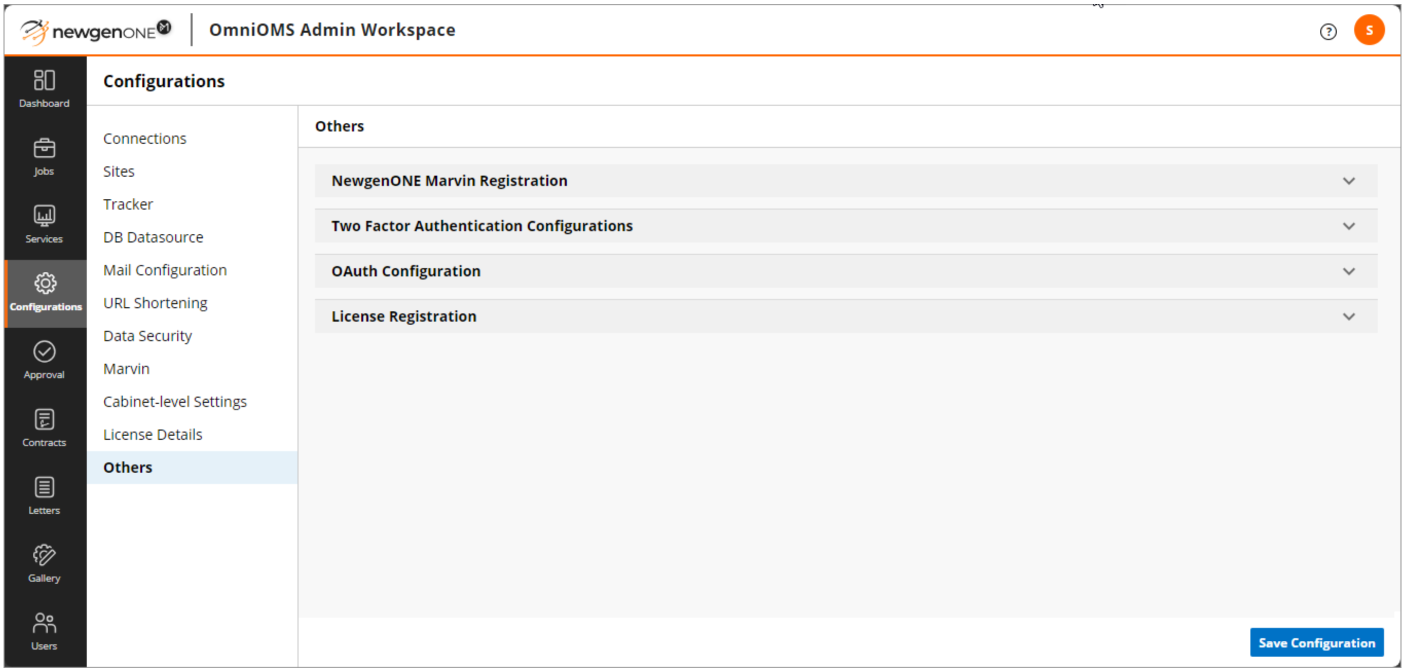
In the **License Details** tab, when the generated records exceed the limit assigned to you on the license the status changes from active to over-utilized. Also, a pop-up generates when you sign-in again to the NewgenONE OmniOMS Admin Workspace.



Others

The **Others** subtab within the Configurations tab provides access to key administrative features such as registering NewgenONE Marvin, configuring two-factor authentication, configuring OAuth, and registering the product license.

- **NewgenONE Marvin Registration** — NewgenONE Marvin is a type of generative Artificial Intelligence (AI) through which you can generate personalized content for the communication templates in the Communication Designer. For example, designers can use NewgenONE Marvin to generate content for welcome letters, loan reminders, disclaimers, and others.
  To use the NewgenONE Marvin feature in Communication Designer, you need to register and configure its engine settings in the Others and Marvin tabs of Admin Workspace, respectively.
- **Two Factor Authentication (2FA)** — It is a measure used to add a layer of security and check unauthorized access to user accounts. The purpose of 2FA is to verify the identity of users by requiring them to specify two different types of authentication details.
  After enabling 2FA, when you attempt to sign in to the NewgenONE OmniOMS Admin Workspace, Composition Designer, or Communication Designer, the system asks you to fill in the user credentials first. On successful verification of credentials system sends a One Time Password (OTP) to the email address associated with your user account or through Short Message Service (SMS). You must provide the correct OTP to further complete the sign-in process.
- **OAuth Configuration** — It enables OAuth in the OmniOMS cabinet. Users can register OAuth-enabled applications from the OAuth configuration tab.
- **License Registration** — It enables you to register a new license key or upgrade an existing one.
  Once registered, you can monitor license communication generation, including volume usage and usage by generation type. Additionally, you can track the license type, volume pack, license status, and auto-renewal date. For more details on the license tracking, see License Details.



Registering NewgenONE Marvin

To register NewgenONE Marvin, follow the below steps:

1. On the Configuration page, go to the **Others** tab.
2. Under the **NewgenONE Marvin Registration** section, specify the following information:

Field	Description
Register Marvin	Enable this option to register the NewgenONE Marvin functionality with the currently signed-in cabinet. By enabling this functionality, you can further configure Marvin in the Admin Workspace and use it to generate AI-based content in the Communication Designer. For more information, see the *NewgenONE OmniOMS Communication Designer User Guide*.
License Key	Enter a valid license key to register NewgenONE Marvin.

3. Click **Save Configuration**.
   Once the configuration is saved successfully, a popup indicating the successful registration of NewgenONE Marvin appears. Additionally, on successful registration, the Register Marvin and License key fields become disabled. This

implies you can no longer change or modify these fields after successfully saving the configuration.

> You need to re-login to Admin Workspace to configure the NewgenONE Marvin settings. On re-login, you can see the NewgenONE Marvin logo on top of the Home page and a new Marvin tab on the Connections page. For more information, see Marvin. Furthermore, on successful registration, the Marvin logo also appears on the NewgenONE Communication Designer Home page.

Related topic(s)

Marvin

Configuring two factor authentication

To configure two factor authentication, follow the below steps:

1. Turn on the **2 factor Authentication** toggle.
2. Select the **Integration Mode** as:
   - **Default** — To select and use an existing mail channel having SMTP mail protocol for integrating 2FA.
     From the **Channel Name** dropdown, select the required mail channel. The details of the selected channel including Account Username, Connection Type, Email ID, Port, and Mail Server Address appear.
     Alternatively, click the add icon + to create a mail channel with SMTP protocol directly from here and use it to implement 2FA. For information on creating a mail channel, refer to the Creating a mail channel section.
   - **Custom** — To specify custom class details for integrating 2FA.
     a. In the **Class Name** field, specify the name of the class you want to use for 2FA.
     b. In the **OTP Length** field, specify the total length of the OTP including letters, numbers, and special characters.
     c. In the **OTP Time Validation** field, specify the time (in seconds) after which the option to resend the OTP gets activated.
3. Click **Save Configuration**. The two-factor authentication configuration gets saved.

Configuring OAuth

To configure OAuth, perform the following steps:

1. On the Configuration page, go to the **Others** tab.
2. Under the **OAuth Configuration** section. Turn on the **OAuth Integration** toggle.
3. Click **Save Configuration**.

   Once the configuration is saved successfully, a popup indicating the successfully enabled OAuth.

   OAuth once enabled cannot be disable again in the same cabinet.

Related topic(s)

OAuth Integration

Registering license

To register a license, follow the below steps:

1. On the Configuration page, go to the **Others** tab
2. Under the **License Registration** section, specify the following information:

Fields	Description
License Key	Enter the valid license key.
Channel Name	Enter the channel name on which the notification is sent for over-utilization.
Email ID	Enter the email ID on which the email is sent for overutilization of the license.

3. Click **Save Configuration**.

   You need to re-login to Admin Workspace to activate the license.

Related topic(s)

License Details

Approval tab

This chapter provides information on the Approval tab present in OmniOMS Admin Workspace. The tab does not appear by default, click **Approval** in the menu bar to open it.

It allows you to view pending, approved, or rejected requests before output distribution and generation.
The Approval tab contains the following subtabs:

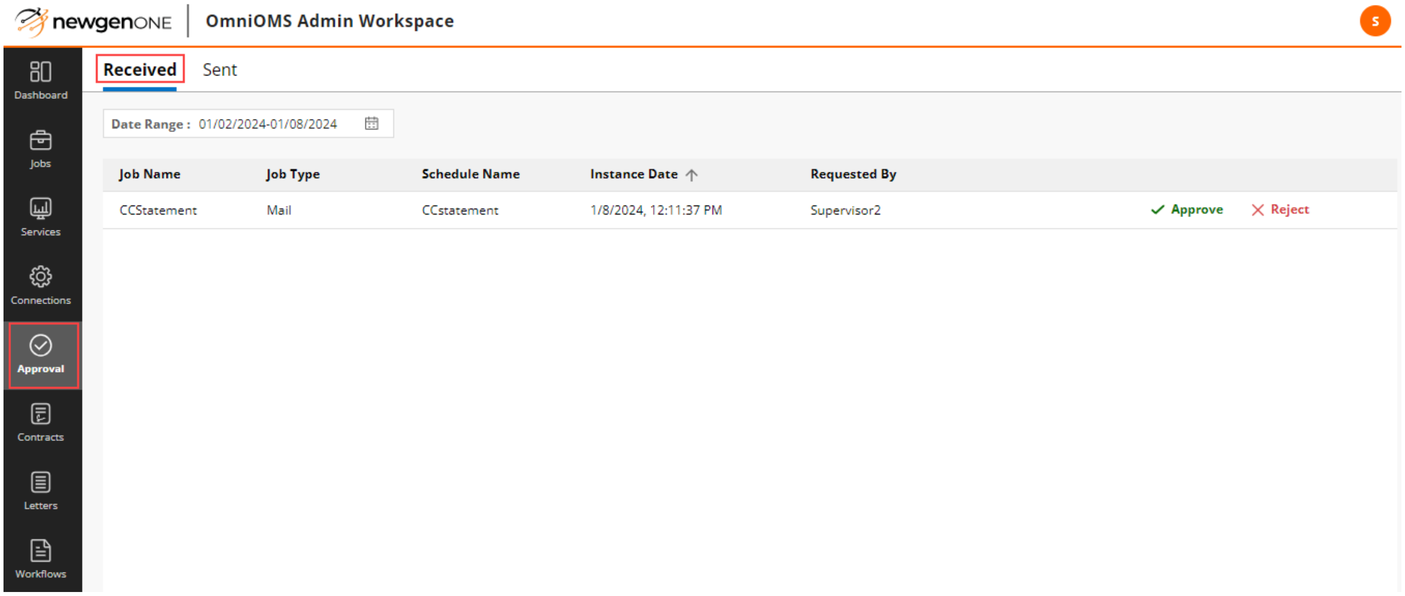
- Received
- Sent

Received

The Received subtab appears by default. It displays the approval requests that the approver has received to review the jobs for sample generation.

- Use the **Date Range** option to view the approval requests received for a specific time interval.
- Click **Approve** to approve the job pending for sample generation and specify approval comments.
- Click **Reject** to reject the job and specify comments for rejection.

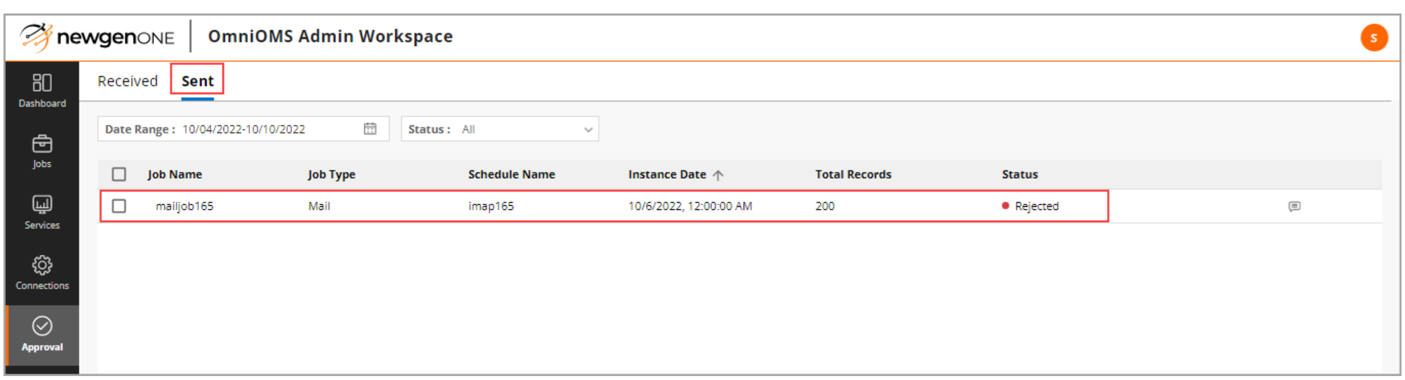
Once approved, the job goes for a generation While on being rejected, the selected job disappears from the received list. It then appears under the sender's **Sent** subtab along with the rejection comments.



Sent

Click **Sent** to open the related subtab. It displays the status of approval requests sent to review the jobs for sample generation.

- Use the **Date Range** option to view the status of approval requests sent for a specific time interval.
- Use the **Status** option to sort the list according to approval status (All, Approved, or Rejected).
- Click the comments icon to view who has approved or rejected the request and comments.
- Hover over the job name and click the delete icon to permanently delete the selected record.



Contracts tab

This chapter provides information on the Contracts tab present in OmniOMS Admin Workspace.

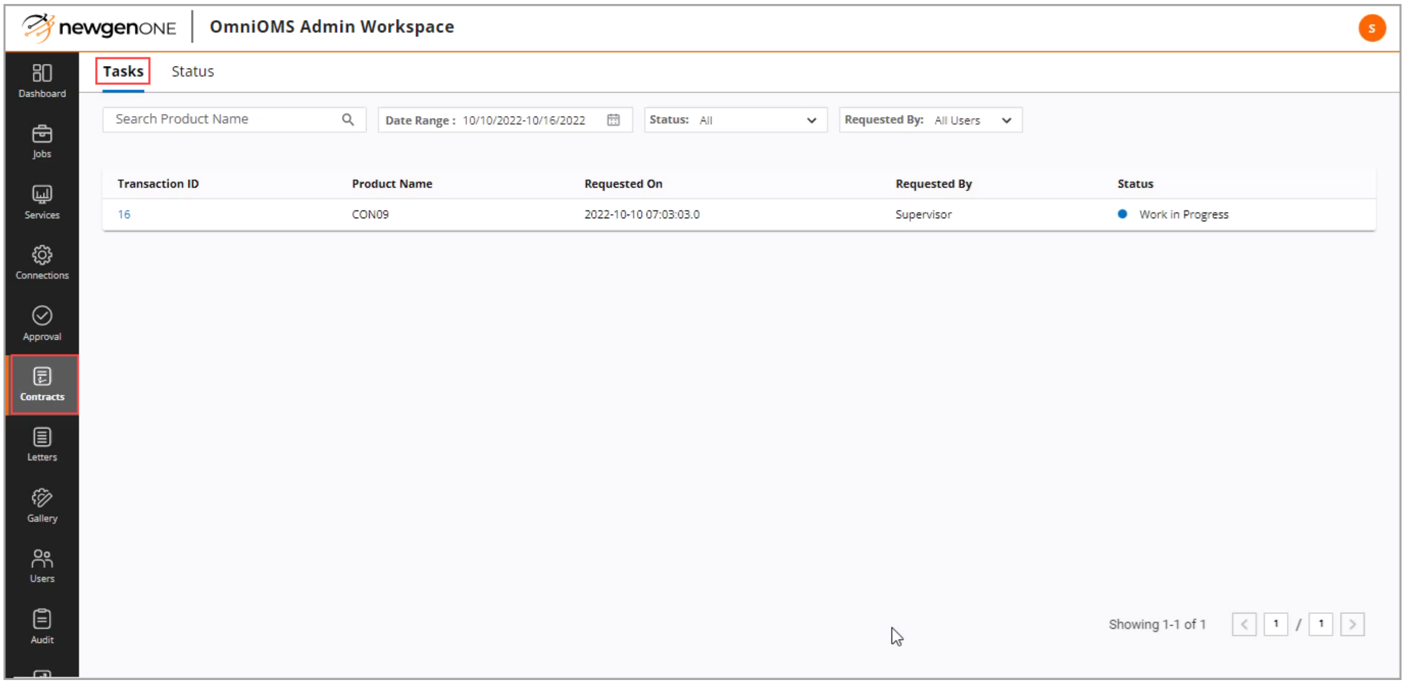
The Contracts tab is visible to Operations Admin or Reviewer-type users only. It allows you to approve, reject, or send the contract for approval.
The tab does not appear by default, click **Contracts** in the menu bar to open it.
The contract tab contains the following subtabs:

- Tasks
- Status

Tasks

The Tasks subtab appears by default. It allows you to view and manage all your pending tasks.

- Use the search bar to search the product by name.
- Use the **Date Range** option to view the pending tasks for a specific time interval.
- Use the **Status** option to sort the list of pending tasks for a specific status. The available options are Work in Progress, Pending Approval, and All (displays the complete list of pending tasks irrespective of status).
- Use the **Requested By** option to sort the list based on the name of the contract initiator.



The list contains the following details of the pending contracts:

- **Transaction ID** — Displays the system-generated serial number of the contract.
- **Product Name** — Displays the name of the contract.
- **Requested On** — Displays the date and time when the contract was requested.
- **Requested By** — Displays the contract initiator's name.
- **Status** — Displays the current status of the contract, that is, Approved, Pending, or Rejected.

To review (approve or reject) a pending contract, click the **Transaction ID** of the respective pending contract. The pending contract appears on the contract reviewer (Communication Editor) page.

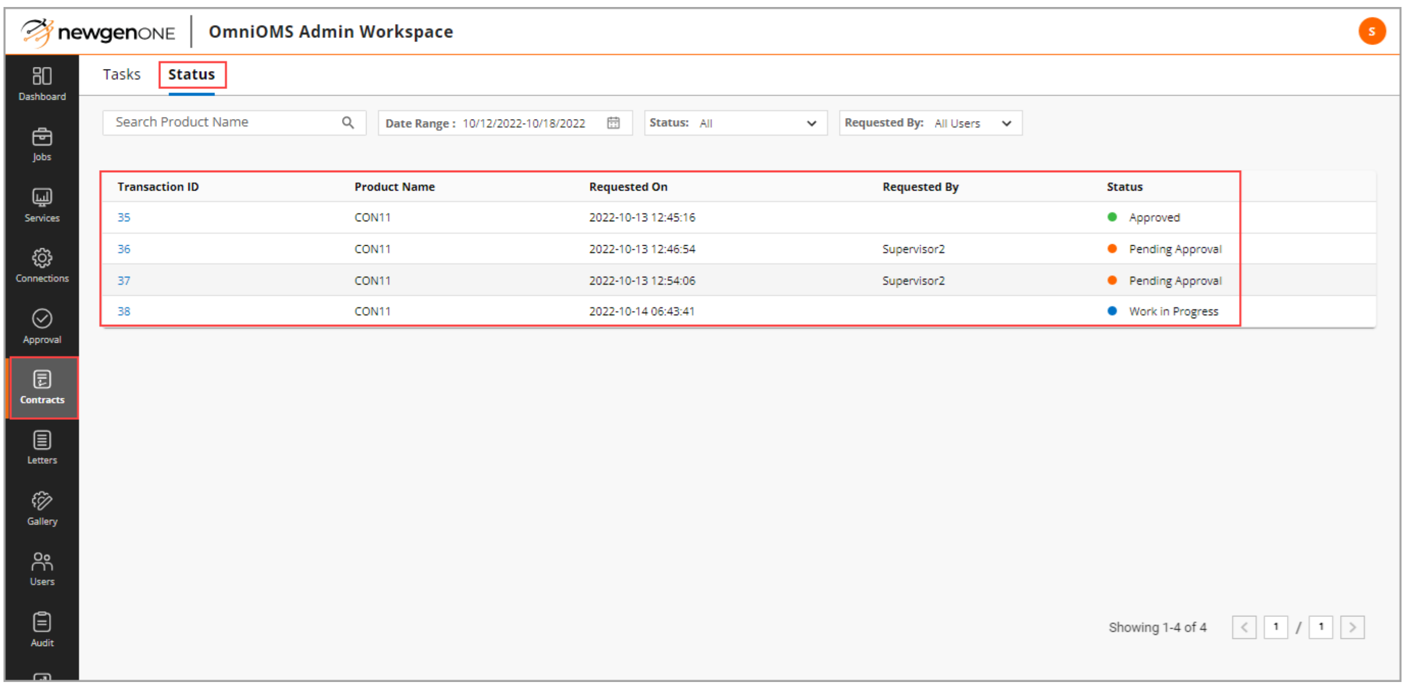
Users other than the Supervisor user can send the contract for approval. A supervisor user must review the contract in OMS Communication Editor and approve or reject it.

For information on viewing and modifying contracts in the Communication Editor, refer to the *NewgenONE OmniOMS Communication Editor User Guide*.

Status

Click **Status** to open the related subtab. It allows you to view and manage the status of your tasks.

- Use the search bar to search the product by name.
- Use the **Date Range** option to view the status of contracts for a specific time interval.
- Use the Status option to sort the list of pending tasks for a specific status. The available options are Work in Progress, Approved, Pending Approval, Rejected, and All (displays the complete list of pending tasks irrespective of status).
- Use the **Requested By** option to sort the list based on the name of the contract initiator.



The list contains the following details of the contracts:

- **Contract No** — Displays the system-generated serial number of the contract.
- **Product Name** — Displays the name of the contract.
- **Last Modified** — Displays the date of the contract on which it was last modified.
- **Pending On** — Displays the name of a user with whom the contract is pending for approval.

- **Status** — Displays the current status of the contract, that is, Approved or Pending.
- **Requested On** — Displays the date of the contract on which it was requested.

To review (approve or reject) or view a contract, click the **Transaction ID** of the respective pending Letter. The pending letter appears on the letter reviewer (Communication Editor) page.

For information on viewing and modifying contracts in the Communication Editor, refer to the *NewgenONE OmniOMS Communication Editor User Guide*.

Letters tab

This chapter provides information on the Letters tab present in OmniOMS Admin Workspace.

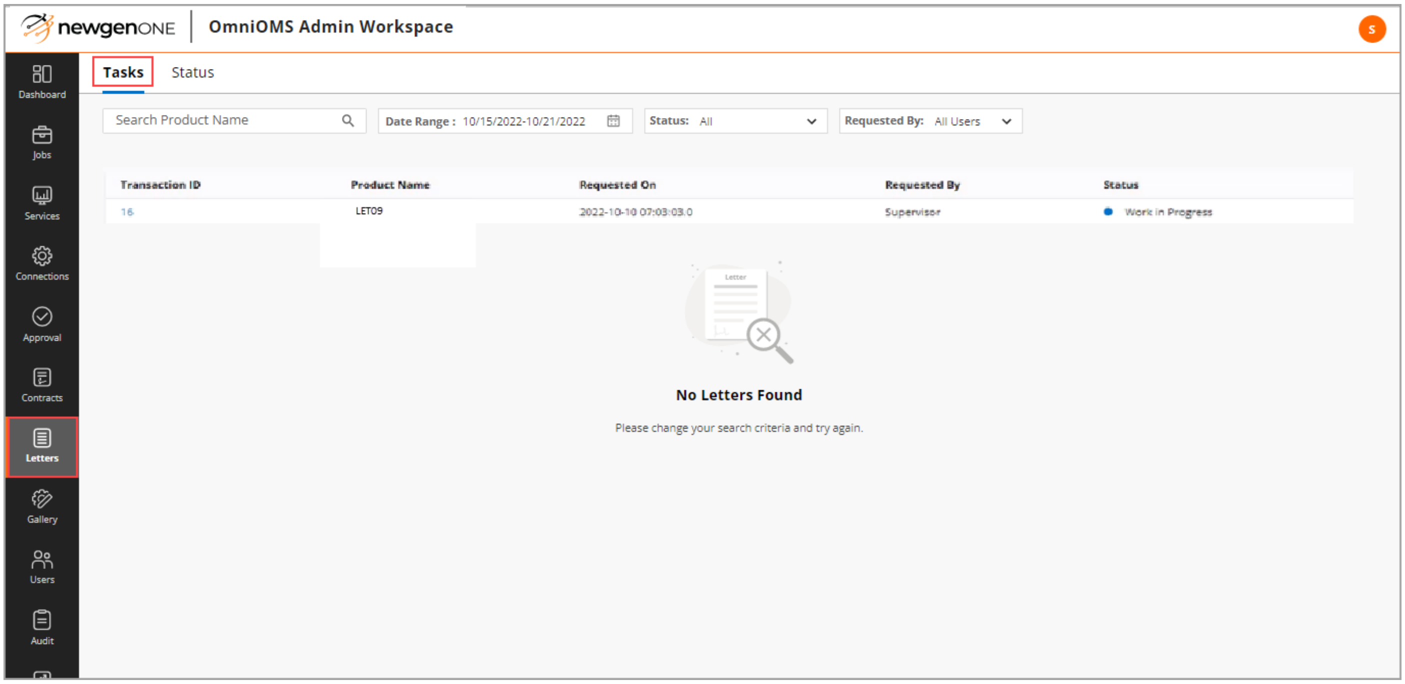
It allows you to approve, reject, or send the letter(s) for approval. The tab does not appear by default, click **Letters** in the menu bar to open it.
The contract tab contains the following subtabs:

- Tasks
- Status

Tasks

The Tasks subtab appears by default. It allows you to view and manage all your pending tasks.

- Use the search bar to search the product by name.
- Use the **Date Range** option to view the pending tasks for a specific time interval.
- Use the **Status** option to sort the list of pending tasks for a specific status. The available options are Work in Progress, Pending Approval, and All (displays the complete list of pending tasks irrespective of status).
- Use the **Requested By** option to sort the list based on the name of the letter initiator.



The list contains the following details of the pending letters:

- **Transaction ID** — Displays the system-generated serial number of the letter.
- **Product Name** — Displays the name of the letter.
- **Requested On** — Displays the date on which the letter was requested.
- **Initiated By** — Displays the name of the user who initiated the letter.

To review (approve or reject) a pending letter, click the **Transaction ID** of the respective pending Letter. The pending letter appears inthe the letter reviewer (Communication Editor) page.

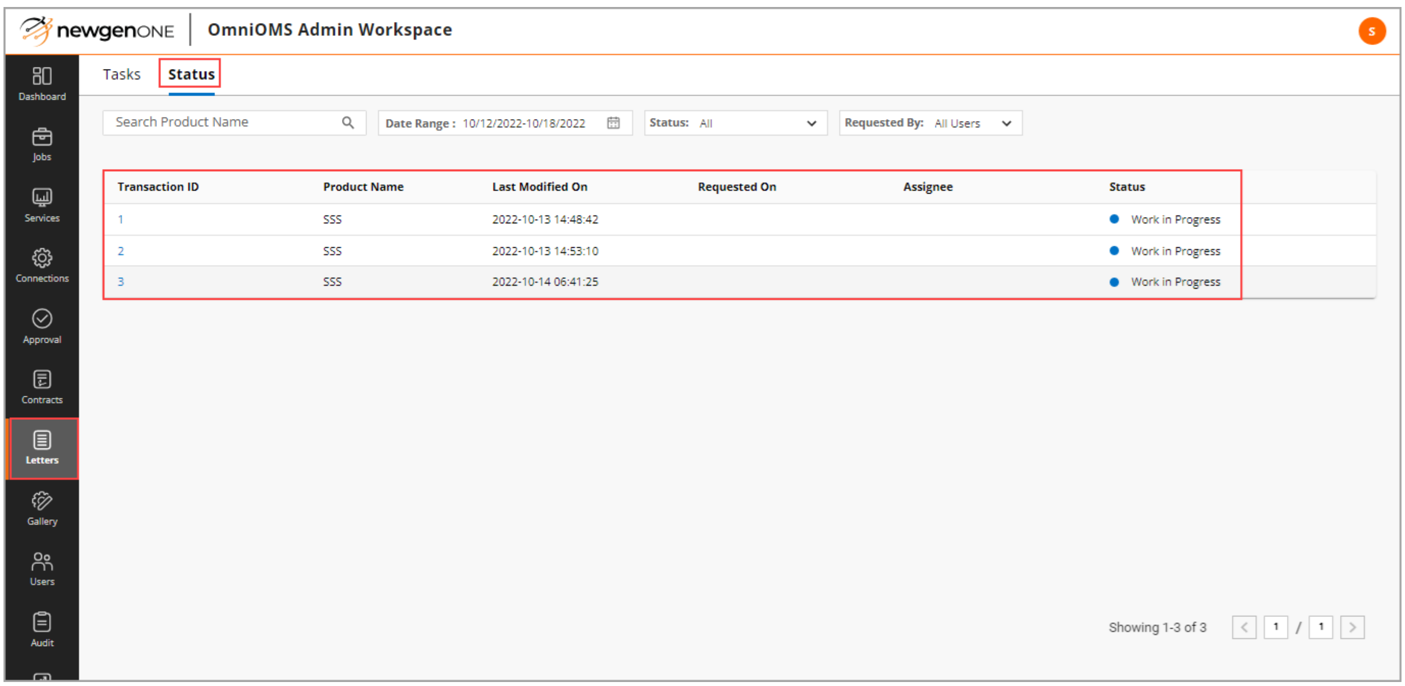
Users other than the Supervisor user can send the letter for approval. A supervisor user must review the letter in NewgenONE OmniOMS Communication Editor and approve or reject it.

For information on viewing and modifying letters in the Communication Editor, refer to the *NewgenONE OmniOMS Communication Editor User Guide*.

Status

Click **Status** to open the related subtab. It allows you to view and manage the status of your tasks.

- Use the search bar to search the product by name.
- Use the **Date Range** option to view the status of letters for a specific time interval.
- Use the **Status** option to sort the list of pending tasks for a specific status. The available options are Work in Progress, Approved, Pending Approval, Rejected, and All (displays the complete list of pending tasks irrespective of status).
- Use the **Requested By** option to sort the list based on the name of the letter initiator.



The list contains the following details of the letters:

- **Transaction ID** — Displays the system-generated serial number of the letter.
- **Product Name** — Displays the name of the letter.
- **Last Modified On** — Displays the date on which the letter was last modified.
- **Requested On** — Displays the date on which the letter was requested.
- **Assignee** — Displays the name of the user to whom the letter was assigned.
- **Status** — Displays the current status of the letter.

To review (approve or reject) or view a letter, click the **Transaction ID** of the respective pending Letter. The pending letter appears on the letter reviewer (Communication Editor) page.

For information on viewing and modifying letters in the Communication Editor, refer to the *NewgenONE OmniOMS Communication Editor User Guide*.

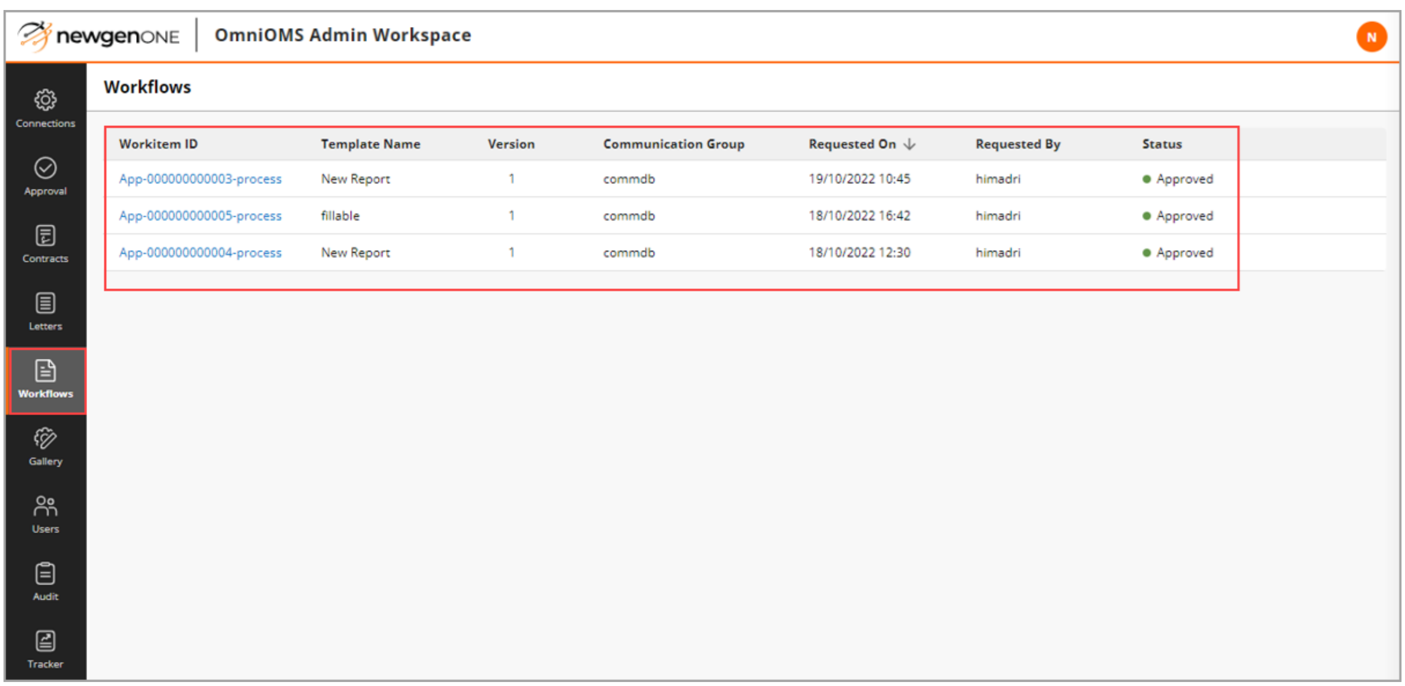
Workflows tab

This chapter provides information on the Workflows tab present in OmniOMS Admin Workspace.

The tab does not appear by default, click **Workflows** in the menu bar to open it. It allows you to review the report templates (designed in OmniOMS Composition Designer) received for approval and provide approval or rejection comments. Approval workflow is essential to ensure that communications are thoroughly reviewed, before sharing with the customers.
Designated reviewers approve or reject the report design templates. The approval flow can either be sequential or parallel.

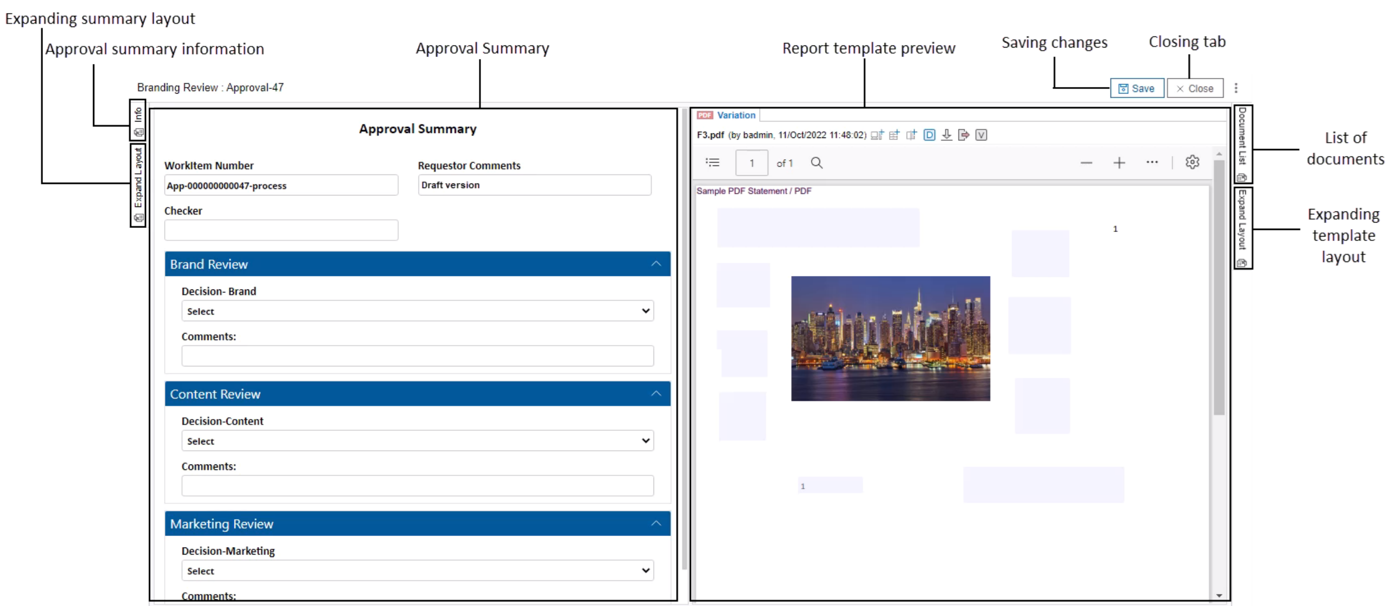
> The Workflows tab appears when you specify a value for the “*iBPSServerURL*” parameter in the *OMSAdminConfig.ini* file.

A list of report templates appears displaying the following information:



Click the **Workitem ID** of the required template to perform the template review or view the comments added for approving, rejecting, or holding the template. The Approval Summary page (designed in iBPS Process Designer) gets invoked.

Based on the business requirements, the user may include the required types of reviews in the approval workflow process at NewgenONE.



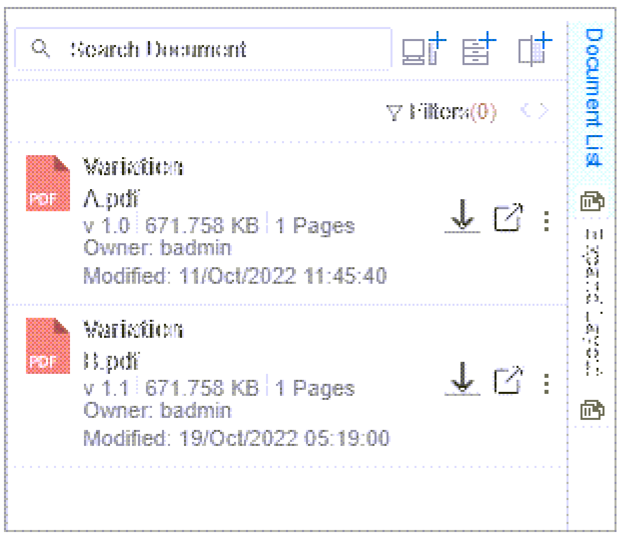
Following table lists the options and information present in the Templates Approval tab:

Field	Description
Report template preview	Displays the preview of the report template.
List of documents	Click “Document List” to view the list of sample templates (created in OmniOMS CDG) available for the report.
Expanding template layout	Click “Expand Layout” to expand the template preview to full page.
Approval summary	Displays the Workitem ID (created at iBPS end for approval workflow), Requestor comments. Use this section to view or specify the list of reviews required for template approval and related comments.
Approval summary information	Click “Info” to view complete details of the template approval workflow, that is, Process Name, Queue, Created By, Introduced By, and so on.
Expanding summary layout	Click “Expand Layout” to expand the approval summary to full page.

Field	Description
Saving changes	Click “Save” to save the changes made to the approval summary. This option does not appear when you view the details or either a rejected or approved template.
Closing tab	Click “Close” to close the approval summary page.

List of Documents

A list of available versions of the documents appears.



Following table lists the options and information present in the Templates Approval tab:

Field	Description
Search Document	Use this option to search the document by name.
Filters	Use this option to filter the list of documents by “File Type” (JPEG, PNG, PDF, or Others), “Updated Within” (select the timeline for which you want to view the documents), or “Uploaded By” (select the name of the user who uploaded the document).
Download	Use this option to download the document to your machine.
Open Document	Use this option to open the document in a new window.

Field	Description
More Options ⋮	Use this option to "Check Out" the document and view the list of Version(s) of the documents.

Approval Summary

A list of review types included in the approval workflow appears. The Workitem Number (generated in iBPS Process Designer), the Requestor's Comments (comment added by user while send it for approval).

To mark the review decision and add comments, follow the below steps:

1. In the **Approval Summary** section under the required type of review, select the **Decision** as **Approved** or **Rejected**.
2. Enter **Comments** for approval or rejection of the template.
3. Click **Save**. The marked decision and added comments are visible to the sender in OmniOMS CDG.

The requestor can view the reviewer comments and review status in OmniOMS Composition Designer.

Gallery tab

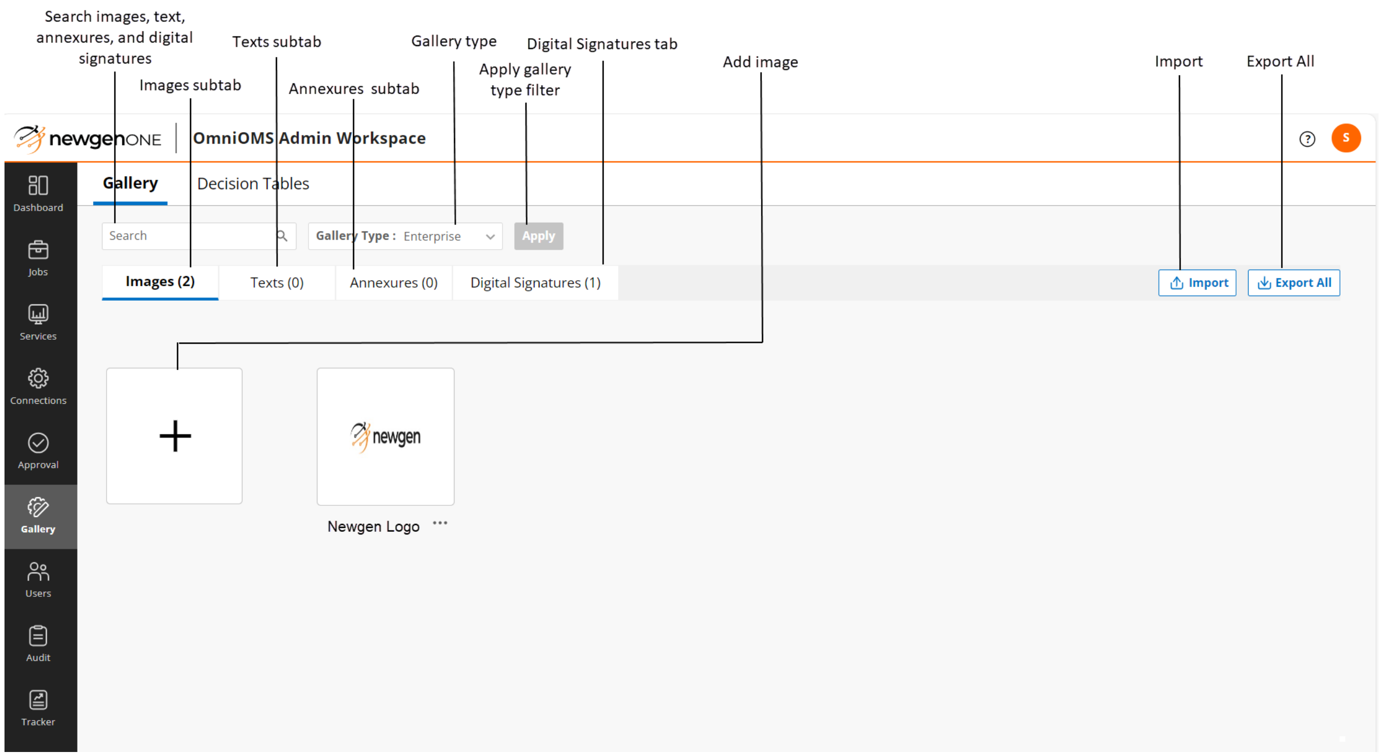
This chapter provides information on the Gallery tab. This tab enables you to manage dynamic content in reports created in the Composition Designer using decision tables. The Gallery tab provides the means to make real-time adjustments to report content and set up digital signatures.
The tab is not visible by default click **Gallery** in the menu bar to access it.

The Gallery tab contains the following subtabs:

- Gallery
- Decision Tables

Gallery

The **Gallery** subtab appears by default. It allows you to change dynamic messages (images, texts, annexures, and digital signatures) to meet the ever-changing need for promotional content.



Following table lists the options present in the Gallery subtab:

Field	Description
Searching Image or Text or Annexure	Use the search bar to search image, text, annexure, or digital signature by name.
Gallery type	Select the Gallery Type as: • Enterprise — to view all the content that is available at the enterprise level • Local — to view all the content that is available locally (at the report level) ◦ Select the required Category, Communication Group, and Report.
Applying gallery type filter	Use the Apply option to sort the content based on the selected gallery type.
Searching image	Use the search bar to search image by name.
Adding image	Use the add icon ⊞ to add another image to the gallery.
Importing Image/Text/ Annexure	Use the Import option to import image, text, annexure, or digital signature into Admin Workspace.
Exporting all content	Use the Export All option to export all the content to your system.

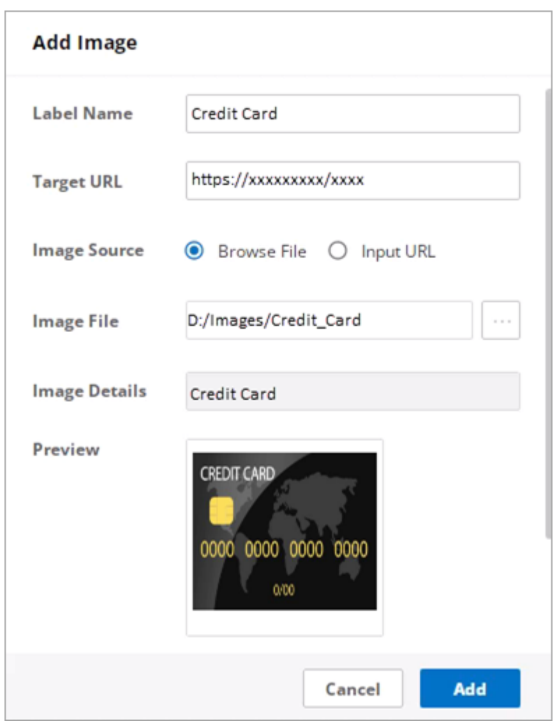
The Gallery subtab contains the following four sections:

- **Images** — This tab displays a list of texts uploaded to the Admin Workspace. These images can further be used in decision tables in Composition Designer and Communication Designer.
- **Texts** — This tab displays a list of texts uploaded to the Admin Workspace. These texts can further be used in decision tables in Composition Designer.
- **Annexure** — This tab displays a list of the annexures (PDF files) uploaded to the Admin Workspace. These annexures can further be used for template designing in Composition Designer and Communication Designer.
- **Digital Signature** — This tab displays a list of uploaded signatures to the Admin Workspace. These signatures can further be used for template designing in Composition Designer and Communication Designer.

Adding a new image

To add a new image to the repository, follow the below steps:

1. Click **+New Image** to add an image to the repository. The Add Image dialog appears.
2. Specify the following details:
   - **Label Name** — Enter the name of the label.
   - **Target URL** — Enter the target URL.
   - **Image Source** — Select:
     - **Browse File** — to browse the image file from your system.
       - Click the ellipses icon to select the **Image File**.
     - **Input URL** — to use the URL of the image to the gallery.
       - Enter the **Image URL**.
   - **Image Details** — Enter the details of the image.
   - **Preview** — Preview of the added image appears.
   - **Image Type** — This option appears in the case of an accessible PDF. Select:
     - **Artifact** — to add a decorative image to you PDF.
     - **Non-Artifact** — to add an alternate text that describes your image.
       - Enter an **Alternate Text** to describe added image.
3. Click **Add**. The image gets added to the repository.



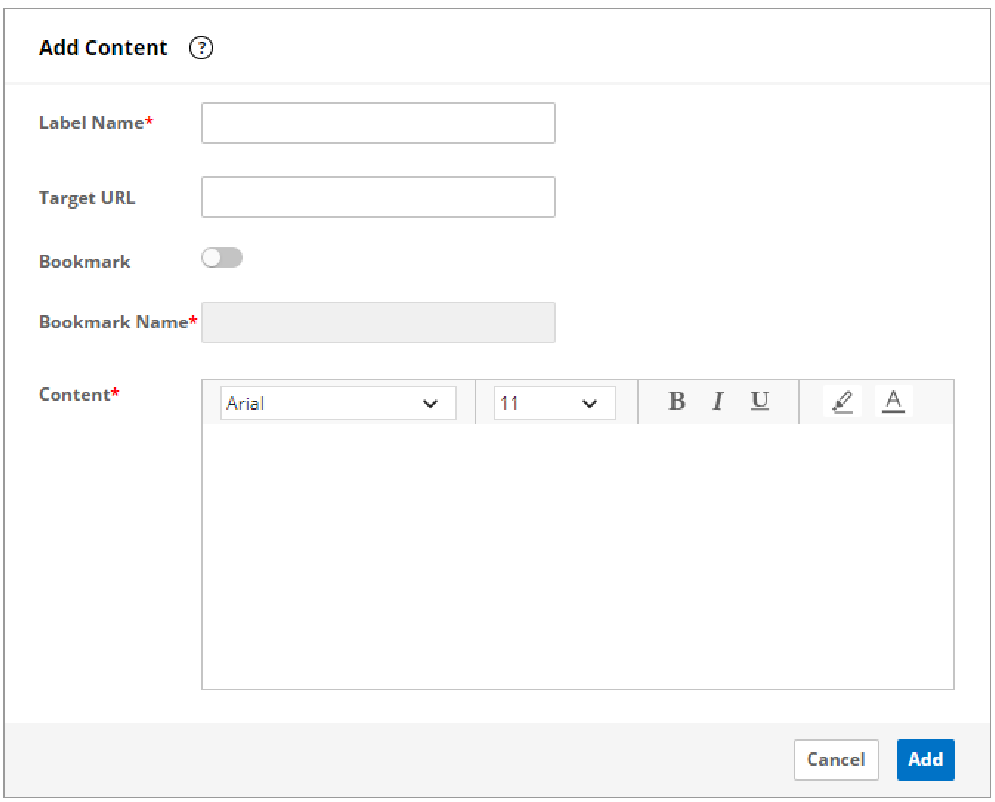
Adding text

To add text (content) to the repository, follow the below steps:

1. Click **+New Text** to add content to the repository. The Add Content dialog appears.
2. Specify the details:
   - **Label Name** — Enter the name of the label.
   - **Target URL** — Enter the target URL.
   - **Bookmark** — This option appears in the case of an accessible PDF. Turn on the toggle to enable adding a bookmark for your content.
     - Enter the **Bookmark Name**.
   - **Content** — Enter the required content.

> Use the available formatting option to format the content

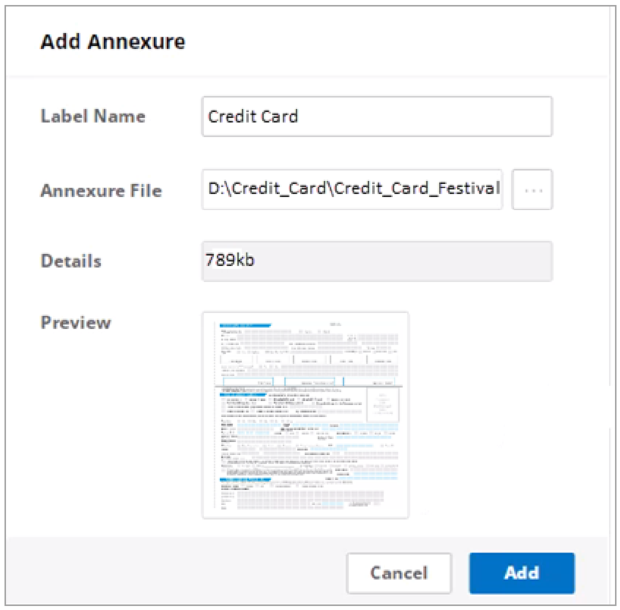
3. Click **Add**. The content (text) gets added to the repository.



Adding an annexure

To add an annexure (PDF file) to the repository, follow the below steps:

1. Click **+New Annexure** to add a PDF file to the repository. The Add Annexure dialog appears.
2. Specify the **Label Name** and **Annexure File**.
3. Click **Add**. The PDF file gets added to the repository.



Adding a digital signature

A digital signature helps you ensure the authenticity of the report and provides data integrity, which means that the report content has not been modified since it was signed.

The Digital Signature tab allows you to set up digital signatures using Personal Exchange Format (PFX) or Hardware Security Module (HSM) methods. The signatures configured within the Admin Workspace can subsequently be used within the Communication Designer and Composition Designer for the purpose of authentication and safeguarding reports.

To add a digital signature, follow the below steps:

1. In the menu bar, click **Gallery**. The Gallery tab appears by default.

2. Go to the **Digital Signatures** tab.
3. Click **+ New Digital Signature**. The New Digital Signature dialog appears.
4. In the **Label Name** box, specify the digital signature name.
5. In the **Configuration Type** field, select one of the following options:
   - **PFX** — Select this option to add a digital signature using the PFX configuration.
     a. In the **Certificate File** field, click the ellipsis icon ... and select the required .pfx certificate file from your computer.
     b. In the **Password** box, specify the password to access the .pfx certificate file.
     c. *(Optional)* Select the **Add Signature Image** checkbox to add a signature image. This enables the Signature Image field.
     d. In the **Signature Image** field, click the ellipsis icon ... to select the required signature image file from your computer.
   - **HSM** — Select this option to add a digital signature using the PFX configuration.
     a. In the **Partition Name** box, specify the required partition name to access the keys used for digital signature.
     b. In the **Password** box, specify the password for the mentioned partition name.
     c. In the **Certificate Label** box, specify the required digital certificate label.
6. In the **Attributes** field, select the attributes to apply to the digital signature:
   - **Make Visible in PDF** — Select this option to make the digital signature visible when viewing the PDF in a PDF reader.
   - **Default Signature** — Select this option to add the following details for the digital signature:
     a. **Location** — Specify the signing location.
     b. **Reason** — Specify the signing reason.
     c. **Contact** — Specify the signing contact.
7. From the **Algorithm** dropdown, select the required type of digital signature encryption algorithm. The available options are:
   - RIPEMD160
   - SHA1
   - SHA256
   - SHA384
   - SHA512
8. In the **Alternate Text** field, specify the text for accessible PDFs.
9. Click **Add**. The digital signature gets added.

For information on how to add a digital signature to a report, refer to the *NewgenONE OmniOMS 12.0 Composition Designer User Guide*.

Accessing additional options

Select the added image, text, or annexure and click the **More Options** ... icon to view the following options:

Field	Description
Edit Details	Use this option to edit the details of the added image, text, annexure, or digital signature.
Export	Use this option to export the added image, text, or annexure.
View Image/View Text/View Annexure	Use this option to view the added image, text, or annexure.
Delete	Use this option to delete the added image, text, annexure, or digital signature.

Importing content

To export content (image, text, or annexure), follow the below steps:

1. Click **Import**. The Import dialog appears.
2. Click **Choose File** to select .zip file containing content.
3. Select **Overwrite labels with the same names** checkbox to overwrite labels with the names of the content present in the .zip file.
4. Click **Import**. The content gets imported.

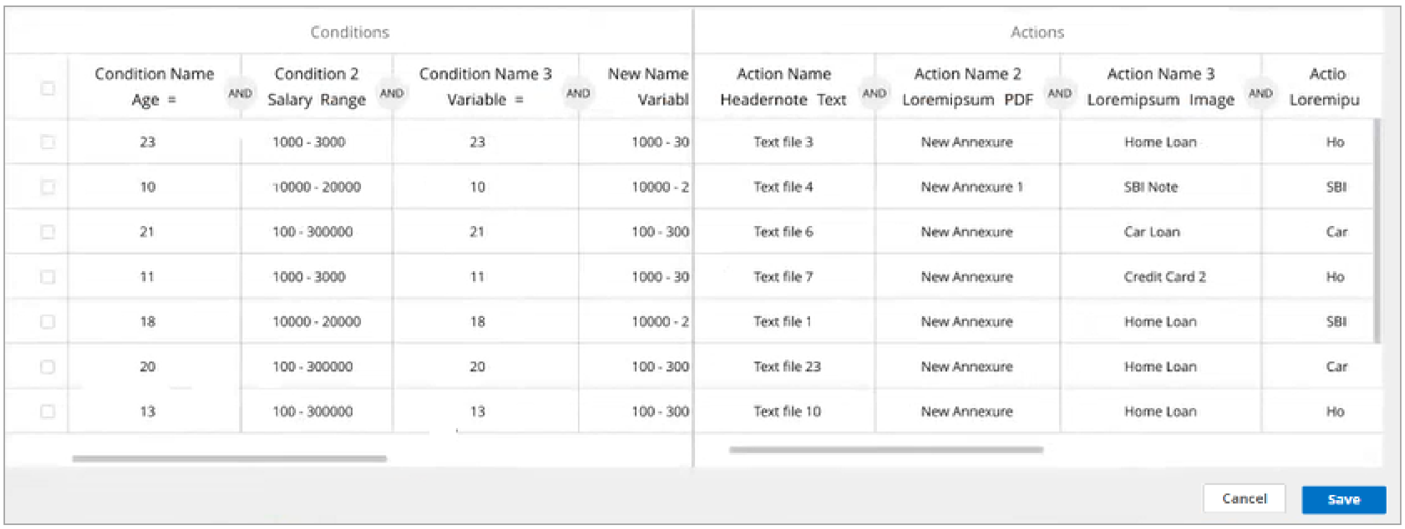
Exporting all content

Click **Export All** to save the content to your system. The content gets downloaded and saved as a .zip file in your system.

Decision tables

Click **Decision Tables** to open the related subtab. It allows you to create a dynamic message.

Select the required **Category**, **Communication Group**, and **Report** using the respective dropdowns. Then click **Apply** to get the list of dynamic tables. You can add, delete, and modify the table data. Also, you can change the order of the data rows.



Conditions					Actions			
	Condition Name Age =	Condition 2 Salary Range	Condition Name 3 Variable =	New Name Variabl	Action Name Headernote Text	Action Name 2 Loremipsum PDF	Action Name 3 Loremipsum Image	Actio Loremipu
	23	1000 - 3000	23	1000 - 30	Text file 3	New Annexure	Home Loan	Ho
	10	10000 - 20000	10	10000 - 2	Text file 4	New Annexure 1	SBI Note	SBI
	21	100 - 300000	21	100 - 300	Text file 6	New Annexure	Car Loan	Car
	11	1000 - 3000	11	1000 - 30	Text file 7	New Annexure	Credit Card 2	Ho
	18	10000 - 20000	18	10000 - 2	Text file 1	New Annexure	Home Loan	SBI
	20	100 - 300000	20	100 - 300	Text file 23	New Annexure	Home Loan	Car
	13	100 - 300000	13	100 - 300	Text file 10	New Annexure	Home Loan	Ho

Cancel Save

Users tab

This chapter provides information on the Users tab present in OmniOMS Admin Workspace.
It allows you to create and manage users and user groups for performing administrative tasks. A user group is a collection of users. Each user belongs to at least one user group.
The tab does not appear by default, click **Users** in the menu bar to open it.

The Users tab contains the following subtabs:

- Users
- User Groups
- Custom Tab Mapping

Users

The **Users** subtab appears by default. It displays the list of available users.

The following table lists the options present in the Users subtab:

Field	Description
Searching user	Use the search bar to search the user by name.
Selecting attributes	Use the Attributes option to sort the list of users based on the following attributes: • S-Type — to allow the user to login into multiple devices at the same time. • Locked — to lock the user. • Active — to make the user active.
Creating new user	Use the **+New User** option to create a new user. For more information, see Creating new user.
List of users	Displays the list of users. The name of the user, email ID of the user, groups with which the user is associated, and attributes appear.

Creating a new user

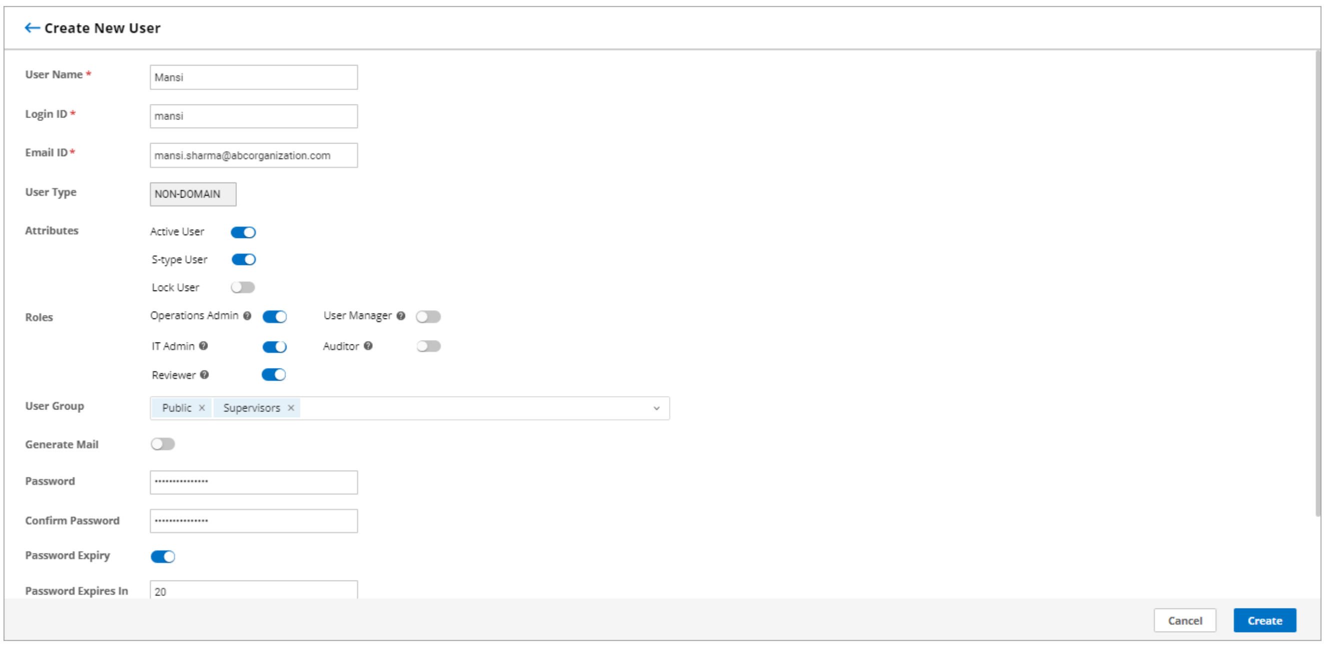
To create a new user, follow the below steps:

1. Click **+New User** option present in the upper-right corner. The Create New User page appears.
2. Refer the below table to specify details in the available fields:

Field	Description
User Name	Enter the name of the user.
Login ID	Enter the ID using which the user logs into the OmniOMS Admin Workspace.
Email ID	Enter the email ID of the user.
User Type	A domain user is a user synchronized with OmniOMS. While users created in OmniOMS are non-domain users. You cannot modify the User Type.
Attributes	Specify the “Attributes” for the user: • Active User — Turn on this toggle to make the user active. • S-type User — Turn on this toggle to allow multiple logins at the same time. • Lock User — Turn on this toggle to lock the user.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Roles</td><td>User management has a rights management option (named privilege) to distribute and control access to the web portal to the users.
Specify the “Roles” to assign the rights to the user:
Operations Admin — An operation admin is responsible for managing all operation activities regarding communication generation and surveillance across the system.
Its responsibility includes
Approval or Rejection
Dynamic Content
Schedule Management
Job History
User Manager — It manages users across the system.
IT Admin — An IT admin is responsible for managing all administrative activities and monitoring across the system.
Its responsibility includes:
Services
Job Queue Management
Auditor — It has the privilege to view the audit logs of the following:
Operations Admin
IT Admin
User Manager
Auditor
Reviewer
Reviewer — It has the privilege to review and approve the batches, templates, letters, and contracts.</td></tr>
<tr><td>User Group</td><td>Click the dropdown to view the available user groups. Select the checkbox against the required user group to associate the user with it.</td></tr>
<tr><td>Generate Mail</td><td>Turn on the “Generate Mail” toggle to allow the system to send an email to the registered email ID of the user for setting up the password.
For successful mail generation configure the mail details in a file.</td></tr>
<tr><td>Password</td><td>Enter a strong password to keep the information safe and log in to OmniOMS Admin Workspace.
Password length must be 8 or greater than 8 characters. Also, it must contain at least 1 character, 1 number, and 1 special character.</td></tr>
<tr><td>Confirm Password</td><td>Enter the password again to validate and confirm the mentioned password.</td></tr>
</table>

Field	Description
Password Expiry	Turn on the "Password Expiry" toggle if you want the password to expire after a specific time duration. Else, keep it off. On enabling the Password Expiry feature, the "Password Expires In" and "Password Expires on" fields get enabled.
Password Expires in	Enter the number of days in which the password expires. This prompts the users to change the password when they log in for the first time.
Password Expires on	The date when the password expires appears based on the number of days you mentioned in the "Password Expires" text box.
Remarks	Enter remarks about the user.



3. Click **Create**. The user gets created and added to the list.

Editing user details

To edit the user details, follow the below steps:

1. Hover over the name of the required user under the **Users** subtab and click the horizontal ellipse icon.
2. Select **Edit Details**. The Edit Details page appears.
3. Make the required changes.

You cannot change the Login ID.

4. Click **Save**. The changes made to the user details get saved.

Deleting a user

To delete a user, follow the below steps:

1. Hover over the name of the required user under the **Users** subtab and click the horizontal ellipse icon ....
2. Select **Delete**. The Delete User dialog appears.
3. Click **Delete**. The user gets deleted.

User groups

Click **Users Groups** to open the related subtab. It displays the list of user groups. User groups help you to divide and manage users belonging to different departments, roles, and responsibilities.

The following table lists the options present in the User Groups subtab:

Field	Description
Searching user	Use the search bar to search the user group by name.
Creating new user group	Use the **+New User Group** option to create a new user group. For more information, see Creating new user group.
List of users	Displays the list of user groups The name of the user group, roles assigned to the users of the group, and users associated with the group appear.

Creating a new user group

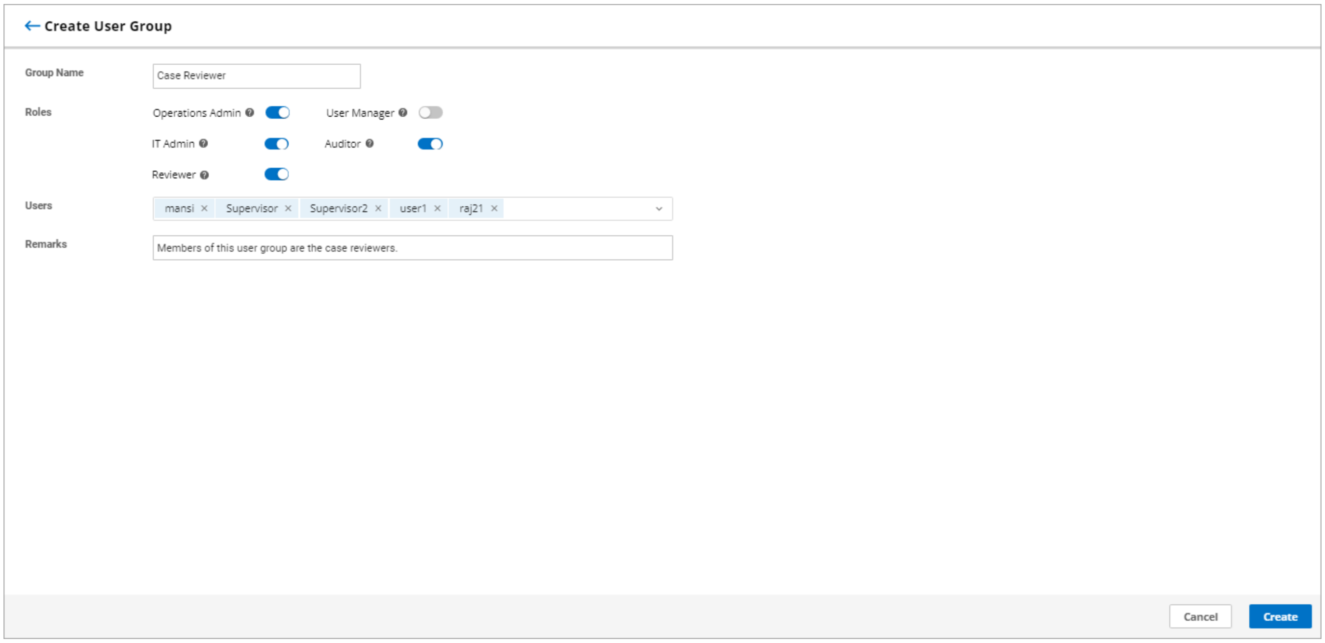
To create a new user group, follow the below steps:

1. Click **+New User Group** option present in the upper-right corner. The Create User Group page appears.

2. Refer the below table to specify details in the available fields:

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Group Name</td><td>Enter the name of the user group.</td></tr>
<tr><td>Roles</td><td>User management has a rights management option (named as privilege) to distribute and control access to the web portal to the users.
Specify the "Roles" to assign the rights to the users of the group:

Operations Admin — An operation admin is responsible for managing all operation activities regarding communication generation and surveillance across the system.
Its responsibility includes
Approval or Rejection
Dynamic Content
Schedule Management
Job History
User Manager — It manages users across the system.
IT Admin — An IT admin is responsible for managing all administrative activities and monitoring across the system.
Its responsibility includes:
Services
Job Queue Management
Auditor — It has the privilege to view the audit logs of the following:
Operations Admin
IT Admin
User Manager
Auditor
Reviewer
Reviewer — It has the privilege to review and approve the batches, templates, letters, and contracts.
</td></tr>
<tr><td>Users</td><td>Click the dropdown to view the available users. Select the checkbox against the required user to associate it to the group.</td></tr>
<tr><td>Remarks</td><td>Enter remarks about the user group.</td></tr>
</table>



3. Click **Create**. The user group gets created and added to the list.

Editing user groups

To edit the user group details, follow the below steps:

1. Hover over the name of the required user group under the **User Groups** subtab and click the horizontal ellipse icon .
2. Select **Edit Details**. The Edit User Group page appears.
3. Make the required changes.
4. Click **Save**. The changes made to the user group get saved.

Deleting a user group

To delete the user group, follow the below steps:

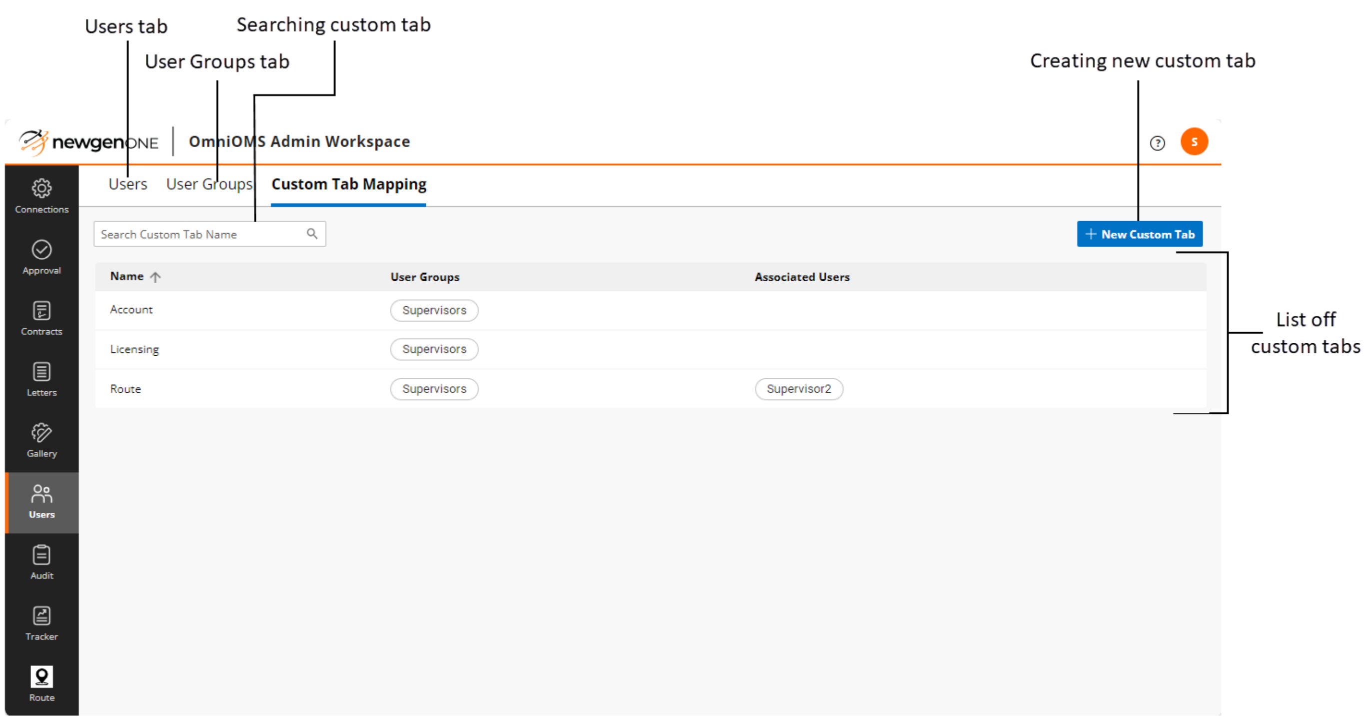
1. Hover over the name of the required user under the **User Groups** subtab and click the horizontal ellipse icon .
2. Select **Delete**. The Delete Group dialog appears.
3. Click **Delete**. The user group gets deleted.

Use the LDAP Integration option to configure and enable LDAP with NewgenONE OmniOMS. For more information, refer to the *NewgenONE OmniOMS LDAP and SSO Integration Guide*.

Custom Tab Mapping

Custom Tab Mapping is a configuration feature that allows you to map an external page with the admin console by creating a custom tab. This feature is only visible to supervisor users who can create, edit, delete, and provide access to the custom tabs. Any other user can use the custom tab, depending on the access given to them.

> If the external page that needs to be mapped is not deployed correctly then the custom tab shows the authentication error.



The following table lists the options present in the Custom Tab Mapping:

Field	Description
Search attribute	Use the search bar to search the custom tabs created by name.
New Custom tab	Use the **+New Custom tab** option to create a new custom tab.
List of custom tabs	It displays the list of existing custom tabs. It displays the following columns: • Name • User Groups • Associated Users

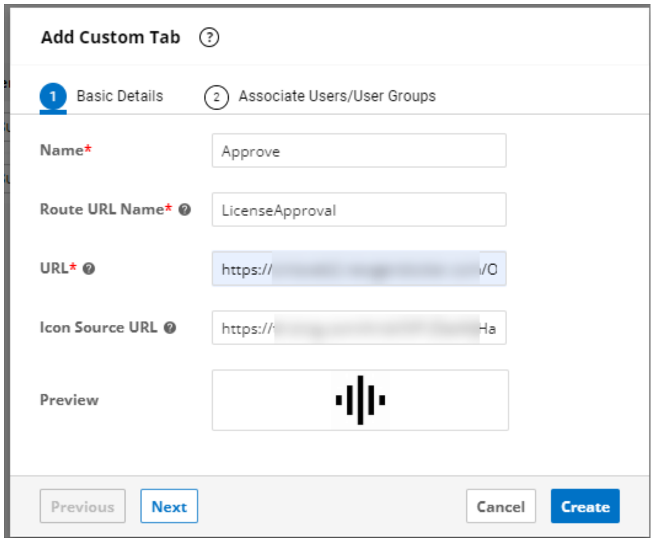
Adding a custom tab

To create a new custom tab, follow the below steps:

1. Click the **+New Custom tab** button present in the upper-right corner. The Add Custom tab page appears and has two sections, Basic Details and Associate Users/ User Groups. By default, the basic details tab appears.
2. Specify the following details in the corresponding fields:

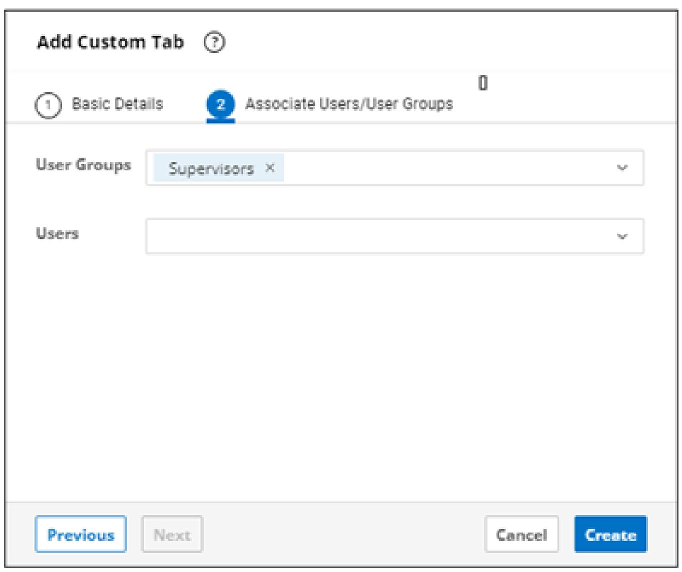
Field	Description
Name*	Enter the name of the custom tab. The name of the custom tab should not have more than 9 characters.
Route URL Name*	Enter a route URL name that displays on the URL of the custom tab. The route URL name should only contain alphabets. The route URL name should be unique.
URL*	Enter the URL path of the external page that must be mapped with the custom tab. For the URL to work, ensure the external feature is deployed on the same server as the NewgenONE OmniOMS *Admin Workspace User Guide*.
Icon Source URL*	Enter the URL for the custom tab icon. If not provided, icon is displayed by default.
Preview	This section displays the icon image, only when the selected external icon has a valid source URL. If URL is not valid, then it displays No Preview Available.

* represents a mandatory field that must be filled while creating the custom tab.



3. Click **Next** to specify details in the Associate Users/User Groups section.
4. Refer to the table below to specify Associate Users/User Groups details:

Field	Description
User Groups	Specify the user group name to grant group access to the custom tab.
Users	Specify the user's name to grant access to the custom tab.



5. Click **Create** to save the specified details and create the custom tab. After being created, the custom tab appears in the table list, and the custom tab starts displaying in the menu bar.

Editing a custom tab

To edit a custom tab, follow the below steps:

1. Hover over to the specific custom tab from the list of custom tabs.
2. Click the edit icon , Custom tab form opens from which you can edit the custom tab.
3. After updating details, click **Save**.
4. Updated details have been added to the custom tab.

Deleting a custom tab

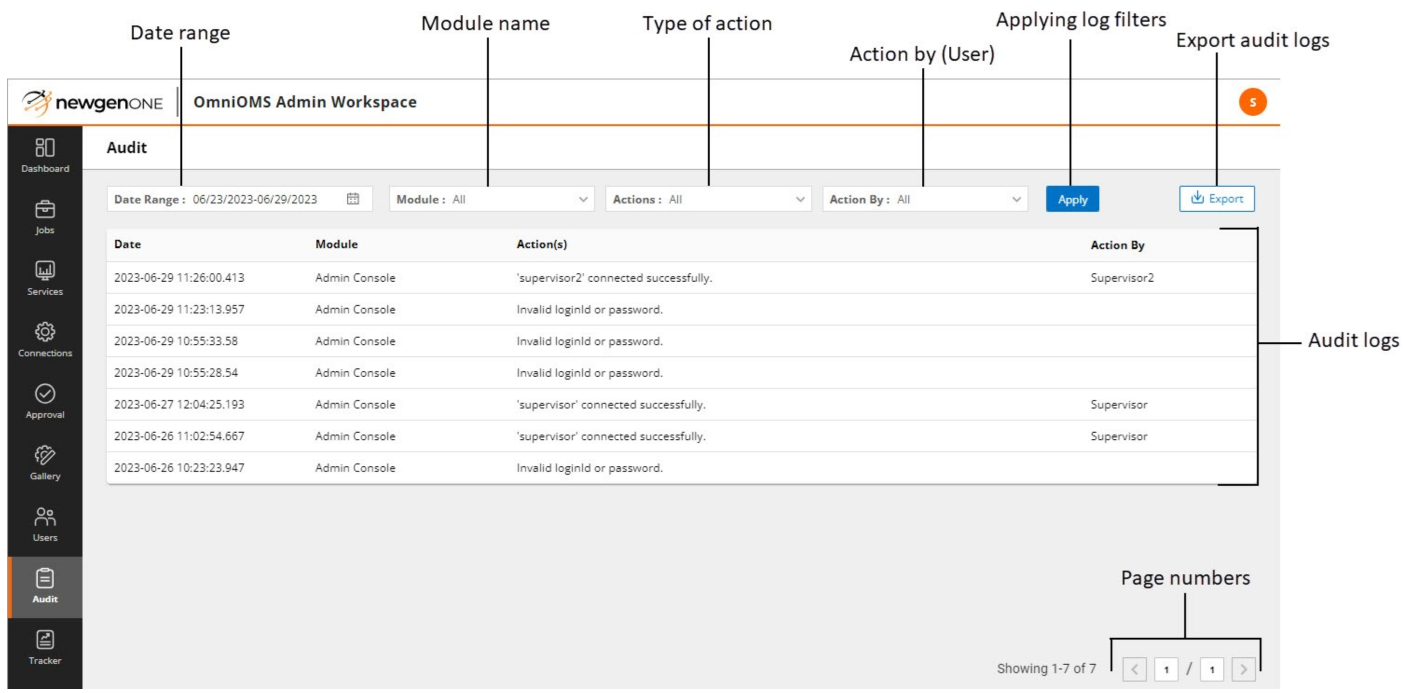
To delete a custom tab, follow the below steps:

1. Hover over to the specific custom tab from the list of custom tabs you want to delete.
2. Click the delete icon , a pop-up appears asking for confirmation to delete the custom tab.
3. Click the **Delete** button that appears on the pop-up.

   The custom tab gets deleted.

Audit tab

This chapter provides information on the Audit tab present in the NewgenONE OmniOMS Admin Workspace.
It allows you to view logs of operations performed by users using Admin Workspace, Composition Designer, and for on-demand jobs.
The tab does not appear by default, click **Audit** in the menu bar to open it.

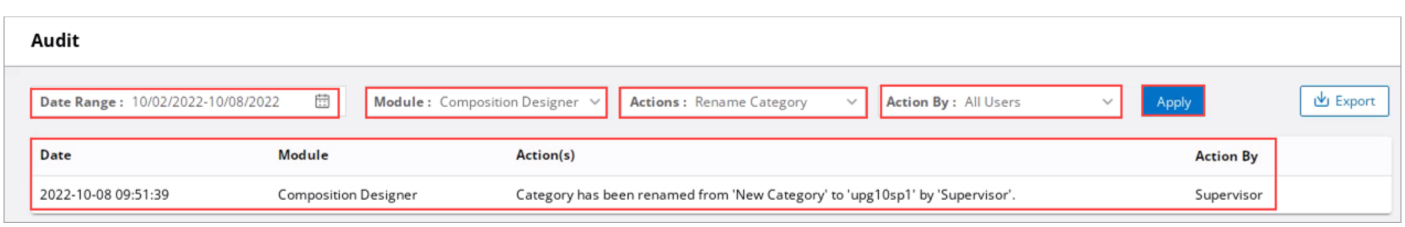


The following table lists the options present in the Audit tab:

Field	Description
Date range	Click the “Date Range” icon to select the range for which you want to view the audit logs. Select: • Last 7 days • Last 14 days • Last 30 days • Custom — to select a specific date range.

Field	Description
Module name	Use the Module dropdown to select: • Admin Workspace — to view logs of operations performed using Admin Workspace • Composition Designer — to view logs of operations performed using Composition Designer. • On Demand — to view logs of operations performed for on-demand jobs Use the All option to view logs of all operations performed using all available modules.
Type of action	Use the Actions dropdown to select the action for which you want to view the log using the dropdown. Use the All option to view logs of all type of operations.
Action by (User)	Use the Action By to select the user to view user-specific audit logs. Use the All option to view logs of all operations performed by all users.
Applying log filters	Use the Apply option to generate the audit logs as per applied filters.
Export audit logs	Use the Export option to export the log details to your system.
Audit logs	Displays the logs as per applied filters. The Date and Time on which operation was performed, Module name, Action performed by the user, and name of user who has performed the action appears.
Page numbers	Displays the total number of pages and the page currently open. • Use the next icon to move to the next page. • Use the previous icon to move to the previous page.

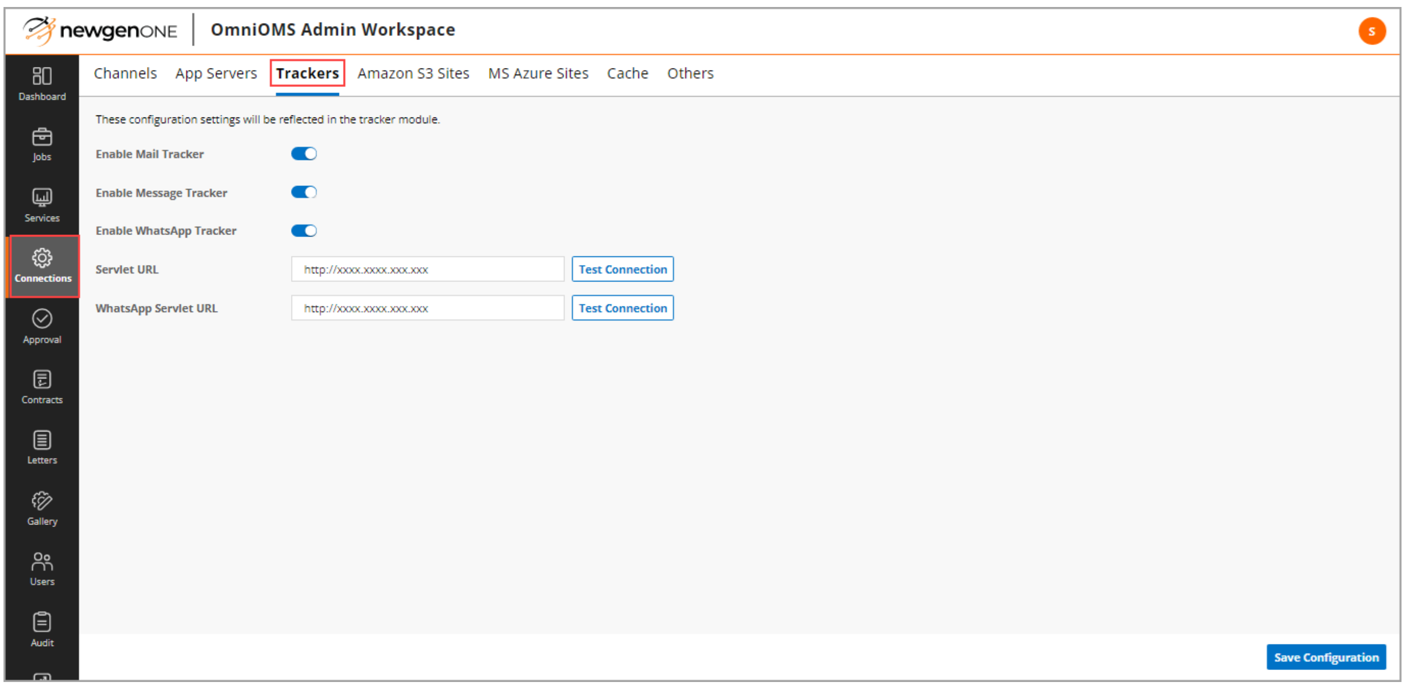
For example, to view the audit logs for Delete Report operation performed by all available users in last seven days using Composition Designer, select Date Range as Last 7 days, Module as Composition Designer, Actions as Delete Report, and Action By as All Users. Then, click Apply to apply the selected filter and generate audit logs according to it.



Trackers tab

This chapter provides information on the Tracker tab present in OmniOMS Admin Workspace.
It allows you to track communications over Mail, Message, WhatsApp, and Promotional channels with delivery and read analysis. The dashboards help you to view communication trends over a specific channel.
The tab does not appear by default, click **Trackers** in the menu bar to open it.

To view information in the trackers tab, you must first configure Trackers in the Connections tab.



Following table lists the options present in the Tracker tab:

Field	Description
Date range	Click the “Date Range” icon to select the range for which you want to view the communication trends. Select: • Last 7 days • Last 14 days • Last 30 days • Custom — to select a specific date range

Field	Description
Tracking type	Select the “Tracking Type” as: • Mail — to track communications over mail channel • Message — to track communications over message channel • WhatsApp — to track communications over WhatsApp channel • Promotional — to track communications over promotional channel
Job name	Select the “Job Name” using the dropdown. Use the All option to view communication trends of all jobs for the selected channel.
Downloading CSV	Click **Download CSV** to download the current trend details in CSV format.

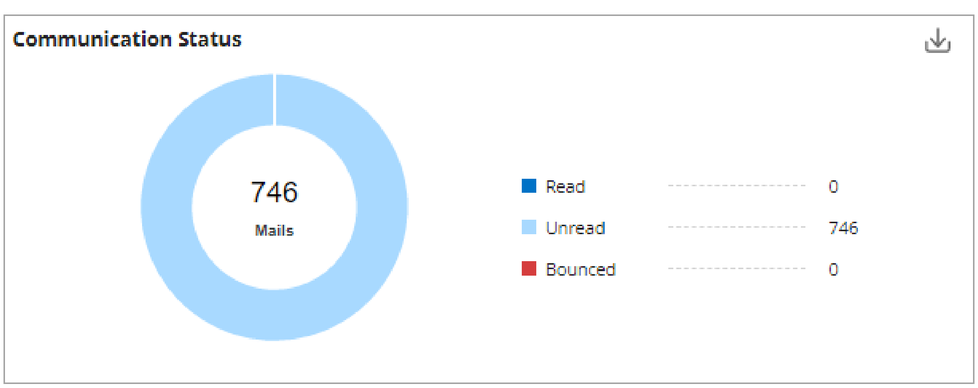
The Tracker tab displays the following trends of the selected job:

- Communication Status
- Product Wise Read Analysis
- Daywise Trend
- Product Tracking

Communication status

The pie chart displays the communication status of the selected job. Total number of communications for the selected job appears at the center of pie chart. Different colours of the pie chart indicate the number of Read, Unread, and Bounced (in case of mails), Delivered and Undelivered (in case of message), and Sent, Delivered, and Read (in case of WhatsApp) communications. Hover over the pie chart to view the percentage status of the communications.

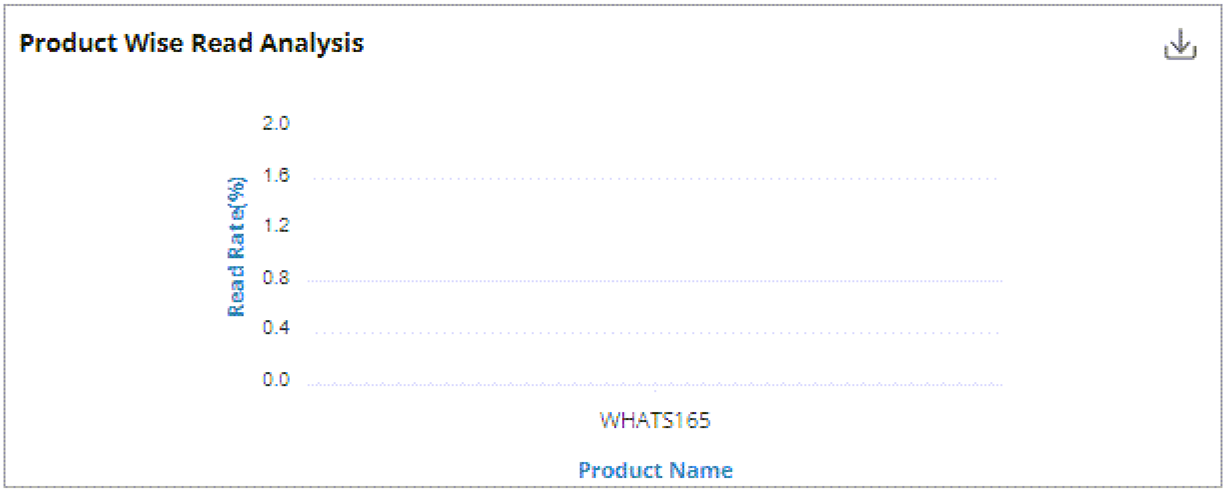
Click the download icon  to download the communication status in .xlsx format.



Product wise read analysis

The graph represents the product-wise analysis of the selected job. The X and Y axis indicates the Read Rate (in percentage) and Product Name respectively.

Click the download icon to download the product-wise read analysis in .xlsx format.

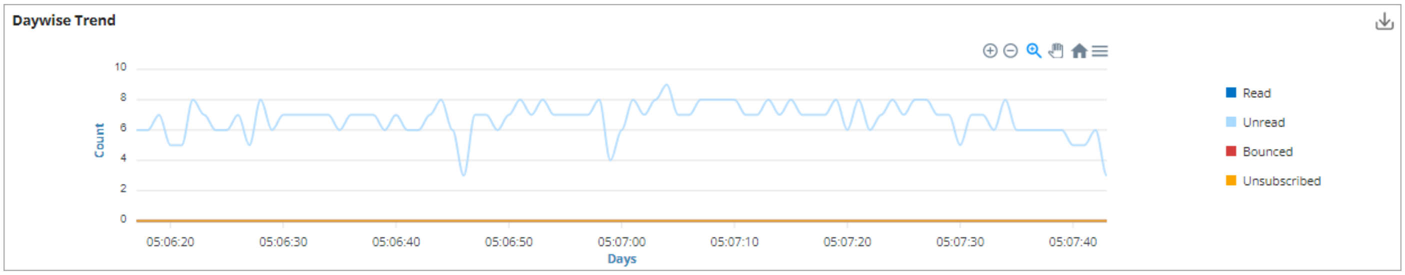


Daywise trend

The line chart represents the daywise trend of the selected job. Different colors of the line chart indicate different labels of the daywise trends. Hover over the chart to view communication trends for a specific period.

- Click the download icon to download the daywise trend in .xlsx format.
- Click the **Zoom In** icon to zoom on the line chart to view finer details of the days trend.
- Click the **Zoom Out** icon to zoom out of the line chart and get a consolidated view of the trend.
- Click the **Selection Zoom** icon to zoom a particular section of the line chart.
- Click the **Panning** icon to pan to a specific section of the line chart.
- Click the **Reset Zoom** icon to exit the applied zoom to the daywise trend line chart.
- Click the **Menu** icon to download the trend details in one of the following formats:
    - SVG

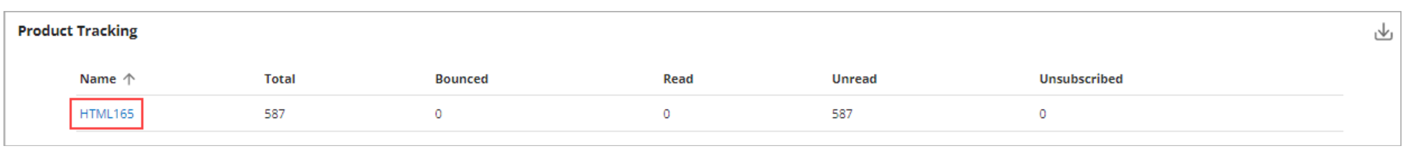
- PNG
- CSV



Product tracking

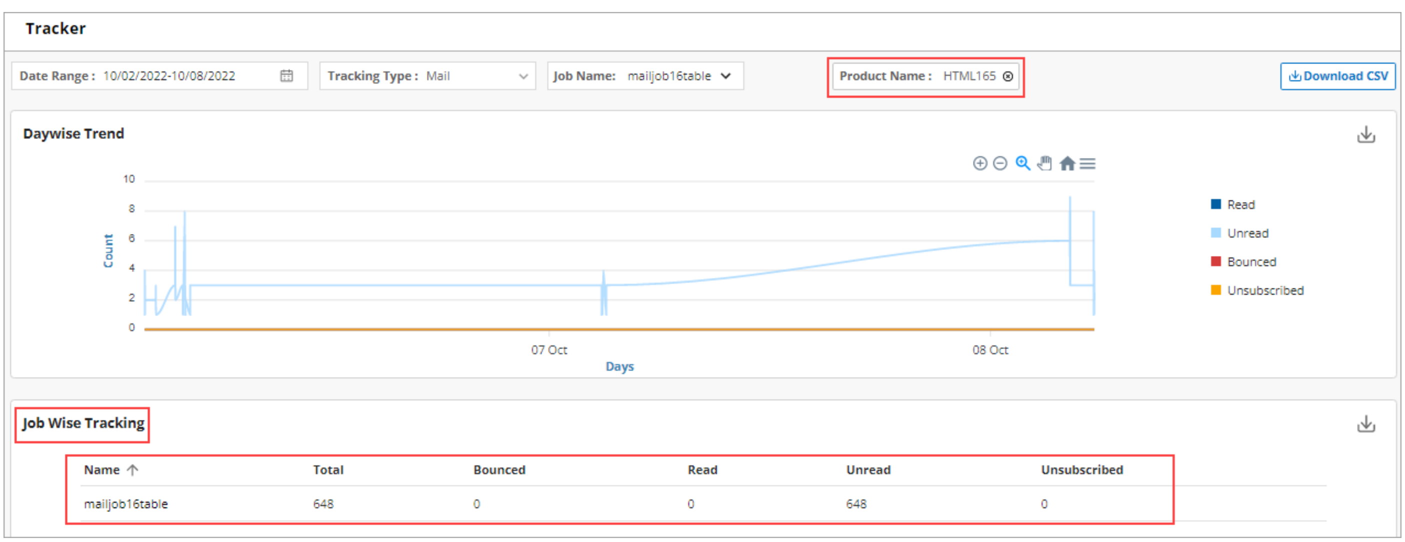
The table represents the communication trends of the products associated with the selected job. The Name of the product, the total number of communications, and their status-wise breakage appear.

- Click the download icon to download the product communication trends details in .xlsx format.
- Click the product name to get insights only for that specific product.
- Click the remove icon present with the product name to exit Job Wise Tracking.



Product Tracking

Name	Total	Bounced	Read	Unread	Unsubscribed
HTML165	587	0	0	587	0



Name	Total	Bounced	Read	Unread	Unsubscribed
mailjob16table	648	0	0	648	0