



# NewgenONE OmniOMS

## Communication Editor

### User Guide

Version: 12.0

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# Contents

<b>Preface .....</b>	<b>4</b>
Revision history .....	4
About this guide.....	4
Intended audience .....	4
Related documents .....	5
Documentation feedback .....	5
<b>Introduction to Communication Editor.....</b>	<b>6</b>
<b>Viewing and modifying documents in Communication Editor .....</b>	<b>7</b>
Data fields.....	7
Task bar.....	9
Paragraphs.....	10
Comments.....	13
More options.....	13
<b>Editing and sending email for an HTML report .....</b>	<b>15</b>

# Preface

This section provides information about the revision history, about this guide, details on the intended audience, and related documentation 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 Communication Editor. It describes the process of viewing and modifying documents using the Communication Editor.

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



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

## Intended audience

This document is intended for system administrators, developers, and all other users seeking information on the functioning of the various features of NewgenONE OmniOMS Communication Editor. The reader must be comfortable understanding the computer terminology.

## Related documents

Following documents provide additional information about the NewgenONE OmniOMS Communication Editor:

- NewgenONE OmniOMS Release Notes
- NewgenONE OmniOMS Administration Guide
- NewgenONE OmniOMS Admin Workspace User Guide
- NewgenONE OmniOMS Composition Designer User Guide
- NewgenONE OmniOMS Communication Designer User Guide

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

# Introduction to Communication Editor

The Communication Editor allows you to view and modify documents, mainly letters and contracts.

! It is only applicable if the dataset type is XSD or JSON and the template type is Contract or Letter.

The following are the key tabs available in the Communication Editor:

- **Data Fields** — This tab displays a list of all used data fields in the template, including their current values in documents such as letters and contracts.
- **Paragraphs** — This allows you to manage and modify clauses within the document, providing flexibility in customizing content to meet specific requirements.
- **Comments** — This tab offers insight into the approval process, displaying user-added comments and approval or rejection comments by reviewers.

To access each option, click the relevant icon on the right side.

The screenshot displays the NewgenONE OmniOMS Communication Editor interface. The main document area shows a paragraph of Lorem Ipsum text and a 'newgen' logo. The right-hand side features a 'Navigate Data Fields' panel with a search bar and a list of data fields:

Field Name	Value
ContractStartdate	2022-08-18
Durationofcontract	5
Name	Test
Salary	95423.45

Below the list are 'Reset' and 'Save' buttons. To the right of the panel are three icons: a data field icon, a paragraph icon, and a comment icon, each with a label: 'Data fields', 'Paragraphs', and 'Comments'.

# Viewing and modifying documents in Communication Editor

This chapter describes how to view or modify, Letters and Contracts in NewgenONE OmniOMS Communication Editor.

## Data fields

The Data Fields option displays a list of all used data fields along with their current values in the document (Letter or Contract). Certain fields are marked with an asterisk (\*) to indicate they are mandatory. The system enforces that these mandatory fields must have a valid value provided before you can save or send the document for approval. If you attempt to save or send without providing a value for a mandatory field, the system displays an error, "Please fill in the highlighted mandatory field."

For date-type fields, a date picker appears, allowing you to select a date from a calendar. List-type fields display a dropdown menu containing a list of items associated with the field. You can select an item from the dropdown to populate the field with the required value. Read-only data fields, which are configured at the dataset level, are not editable. For data fields configured at the report level, you can set a Display Name. This name appears in the interactive editor to help identify the data field.

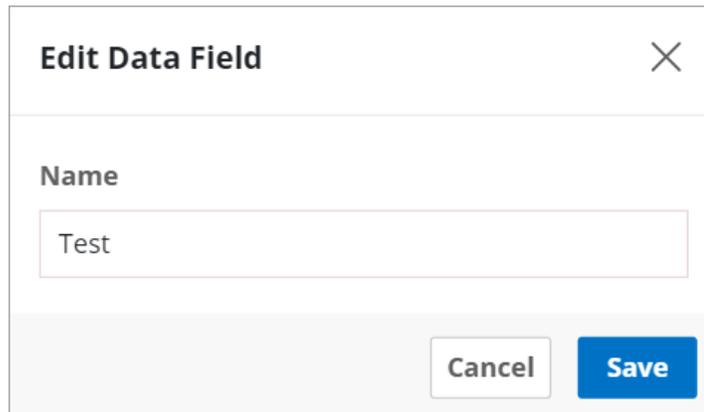
The search box enables you to search for specific report fields by their names. When you select a value for a data field, the search result indicates the total number of matching entries of the selected field value in the PDF. These matching entries are highlighted within the document, serving as a visual cue to indicate that changing the value of this field might impact the highlighted entries. This allows you to consider the potential impact before making any changes.

Additionally, you can revert the data field values to their original ones using the **Reset** button.

## Modify a data field

You can access or modify data fields in the PDF by clicking them. To modify the value, perform the following steps:

1. Click the required data field, the Edit Data Field dialog appears.

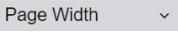


The image shows a dialog box titled "Edit Data Field" with a close button (X) in the top right corner. Below the title bar, there is a label "Name" followed by a text input field containing the text "Test". At the bottom right of the dialog, there are two buttons: "Cancel" and "Save".

2. Modify the value or enter a new value in the textbox.
3. Click the **Save** button allowing you to change the value directly.

# Task bar

Following is the list of options included in the task bar:

Option	Description
Find in Document 	Use this option to search or find content in the letter or contract.
Previous Page 	Use this option to scroll down the letter or contract.
Next Page 	Use this option to scroll up the letter or contract.
Page <input type="text" value="1"/> of 3	Use the page textbox to specify enables a user to navigate directly to the desired page of the Letter.
Zoom Out  and Zoom In 	Use the “Zoom Out” option to get a diminished view of the contract or letter and use “Zoom In” to get an expanded view of the contract or letter.
Page Width 	Use the “Page Width” option to set the specific width of the page.
Text 	Use this option to add text to the letter or contract. It also includes a slider to adjust the text size and a color option to change the text color.
Print 	Use the “Print” option to print the letter or contract.
Download 	Use the “Download” option to download the letter or contract to your machine.
Bookmark 	Use the “Bookmark” option to bookmark the letter or contract.
Tools 	Click the tools icon to view more PDF viewer options.
Toggle Sidebar 	Click the sidebar icon to view thumbnails, attachments, and layers included in the document.

# Paragraphs

The Paragraphs option displays the list of clauses that you can edit and delete as per your requirement.

**!** Tables or rich text boxes created in OmniOMS Composition Designer and OmniOMS Communication Designer do not appear in the Communication Editor. Only paragraphs are visible as editable clauses.

Use the search bar to search the clause by name.

In **Edit Mode**, use the filter icon to select:

- **All** — View the complete list of clauses included in the document (letter or contract).
- **Editable** — View the list of edited clauses. You can edit the required text in the paragraph.

**!** When designing a letter or contract using OmniOMS Composition Designer and OmniOMS Communication Designer, the designer marks the text as editable or non-editable using the Control Editing feature. The text marked as editable appears black in color, while non-editable text appears light grey in color.

The control editing icon  represents that the paragraph is enabled with control editing. Make the required changes to the text available for editing in the paragraph and click "Save".

- **Removable** — View the list of clauses that can be removed from the document.

In **Review Mode**, use the filter icon to select:

- **All** — View the complete list of clauses included in the document.
- **Edited** — View the list of editable clauses available in the document.
- **Removed** — View the list of removed clauses.

**!** In the Review Paragraph dialog box, use the arrows at the bottom to navigate through changes made within the clause.

The rich text editor consists of the following options to format the clause:

Option	Description
Font Style <input type="text" value="Arial"/>	Use this option to change the font style of the selected text in the clause.

Option	Description
Font Size 	Use this option to increase or decrease the size of the selected text in the clause.
Bold <b>B</b>	Use this option to bold the selected text making it thicker and darker.
Italics <i>I</i>	Use this option to italicize the selected text causing it to slant towards the right.
Underline <u>U</u>	Use this option to underline the selected text in the clause.
Unordered List 	Use this option to specify an unordered list in the clause. The available option is round bullets.
Ordered List 	Use this option to specify an ordered list in the clause. The available option is numbers, that is, 1, 2,3 and so on.
Highlight 	Use this option to highlight the selected text in the clause.
Text Color 	Use this option to change the color of the text.
Hyperlink 	Use this option to insert a hyperlink into the text, allowing you to link to external websites or resources. For more information, see <a href="#">Using hyperlink</a> .
Ask Marvin 	This feature allows you to elevate your text based on specific prompts and improvements. For more information, see <a href="#">Using Ask Marvin</a>

As an approver of the documents (letters and contracts) in the paragraphs section, after reviewing the changes made to the paragraph, click the:

- Approve button  — to approve the paragraph. Enter approval comments and click **Approve**.
- Reject button  — to reject the paragraph. Enter rejection comments and click **Reject**.

All paragraphs in the document must be approved in order for the document to be approved. Rejecting a paragraph and then attempting to approve the document results in an error. You must reject the paragraph in this case.

## Using hyperlink

To use a hyperlink, perform the following steps:

1. Select the text where you want to add a hyperlink to the text.
2. Click the Hyperlink icon in the para edit tools menu. The Hyperlink dialog appears.

3. Enter the following details:

Field	Description
Text to display	Use this option to specify the text that appears as the hyperlink and is created as a link in the PDF.
Link	Use this option to enter the URL or destination that is embedded in the text to create and redirect to the hyperlink in the PDF.

4. Click **Add** to insert the hyperlink.

 This same option can be used to modify the existing hyperlinks in PDF which are under editable clauses.

## Using Ask Marvin

To use NewgenONE Marvin for improving content, perform the following steps:

1. From the upper options, click **Ask Marvin**. The NewgenONE Marvin pane appears on the right.

The Content Improvement screen appears with the following options:

Field	Description
Fix Spelling and Grammar	Allows you to automatically correct spelling and grammar issues in the selected text.
Tone Adjustment	Allows you to adjust the tone of the text. You can choose from six tone options: Crisp, Warning, Professional, Optimistic, Assertive, and Encouraging.
Simplify Language	Allows you to simplify complex language, making it more accessible and easier to understand.
Message Length Optimization	Allows you to optimize the length of the message according to your preferences.
Language Translation	Allows you to translate the content into the selected language from the following options: English, Hindi, and French.
Additional Inputs	It refers to additional instructions you provide to Marvin for generating accurate content.
Voice Input 	This allows you to add additional inputs using the mic option to dictate by speaking.

2. Click the **Generate** button to apply the selected improvements to your text. The enhanced text will replace the original content in the text box.

## Viewing content version history

You can view the content history using the Prompt History icon  on the top-right corner of the NewgenONE Marvin pane. You can select the required version to restore the desired content.

To view the version history of the content improved using NewgenONE Marvin, follow the below steps:

1. On the NewgenONE Marvin pane, click the **Prompt History** icon .

 The Prompt History icon appears when you are re-generating content using NewgenONE Marvin.

The Prompt History lists content generated using NewgenONE Marvin in chronological order with time details.

You can click **Show More** to view the entire content.

2. (Optional) To delete an unnecessary version of content from the list, hover over the required content and then select **Delete** .
3. Select the required content version you want to use. On selecting, the control uses the selected content version.

## Comments

The **Comments** option displays the list of comments added by the user while sending the letter or contract for approval. Also, the approval or rejection comments added by the reviewer appear.

 Comments are added for each paragraph, and approval or rejection comments are taken as input.

## More options

When you open a document (contract or letter) using the **Tasks** subtab from Admin Console, the following options appear in the upper-right corner of the Communication Editor:

- Click **Approve** to approve the document (letter or contract) and specify approval comments.

- Similarly, click **Reject** to reject the document and specify the rejection comments.

When you open a document (contract or letter) using the **Status** subtab from Admin Console, the following options appear in the Communication Editor:

- **Editing:** to view and edit the document.
- **Reviewing:** allows you to track changes made in clause.
- **Change traversal:** for moving next or previous changes within a clause.
- Click **Set to Default** to reset all the changes made and restore the default state of the document.
- Click **Send for Approval** to send the document for approval after making the required changes. Select the **Approvers** and enter your **Comments**.

- Approvers can also be pre-configured in the ReviewerList tag, allowing the document to be sent for approval directly. For more information, refer to the *NewgenONE OmniOMS Communication Editor Integration Guide*.

- ! When the *SendMail* property is enabled and configured for the Communication Editor associated with a letter or contract, along with an email template, the OmniOMS Communication Editor allows you to access the Send Mail screen. This screen enables you to review and customize the email before sending it to end users. For procedural details, refer to the [Editing and sending email for an HTML report](#).

### Shortcut keys for Communication Editor operations

You can navigate through the entire Communication Editor module using the following shortcut keys:

Shortcut keys	Action
Tab	Move forward.
Shift+Tab	Move backward.
Space	Select or remove the selection of the checkbox.
Enter	Execute selected action.

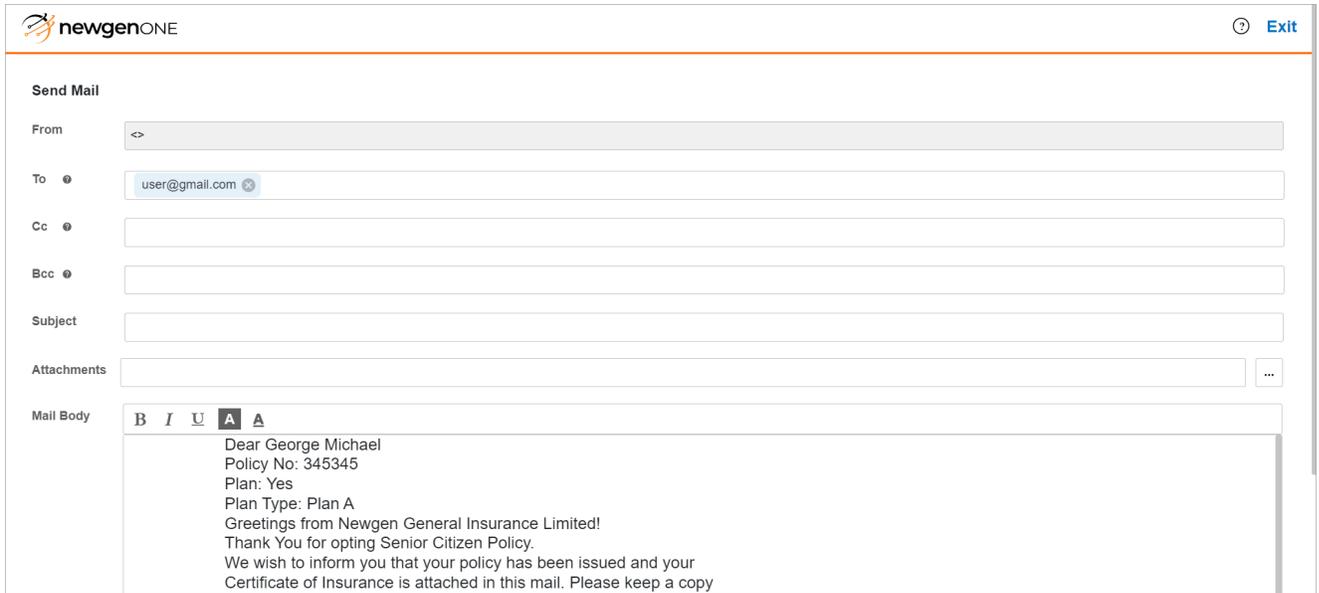
# Editing and sending email for an HTML report

The NewgenONE OmniOMS Communication Editor enables you to customize the email communication for an HTML report before sending it to end users. The HTML report design is created in the Composition Designer and Communication Designer module.

For example, XYZ Bank is introducing an exclusive savings product for selected customers. Leveraging the NewgenONE OmniOMS Communication Editor, a bank employee customizes a personalized email invitation. This invitation comprehensively outlines the distinctive features and benefits of the new product, ensuring a targeted and compelling message efficiently reaches the intended customers of the bank.

To edit and send email communication for HTML report, perform the below steps:

1. Create an HTML report in the Composition Designer and Communication Designer module. For procedural details, refer to the respective user guides.
2. Configure and launch the NewgenONE OmniOMS Communication Editor for an HTML report using your unique product name. For procedural details, refer to the *NewgenONE OmniOMS 12.0 Communication Editor Integration Guide*.  
On successful launching, the Send Mail screen appears. This screen displays an email format with the pre-filled data specified in the Composition Designer and Communication Designer module.



3. Specify or modify the following fields:

Field	Description
From	Displays the sender email ID. It is a non-editable field.
To	Allows you to add or modify the receiver email ID.
Cc	Allows you to add or modify the CC receiver email ID.
Bcc	Allows you to add or modify the BCC receiver email ID.
Subject	Allows you to add or modify the email subject.
Attachments	Allows you to add or remove the attachments from the email.
Mail Body	Allows you to modify the content from the email body. Additionally, you can use the rich text editor options to apply styles such as bold, italic, underline, background color, and text color to enhance the presentation of your email.

4. Click **Send** to proceed. The email communication for the HTML report is sent to the selected users.