



# CKYC\_DOC\_UPLOAD\_REPORT User Manual



**(NEWGENCONFIDENTIAL)**  
**NewgenSoftwareTechnologiesLtd.**  
**New Delhi, INDIA**

- iBPS login page appears after clicking the **iBPS CKYC Portal**.
- User can give their credentials to login **iBPS**.

OmniApp | Login

dms.uiic.in/omniapp/pages/login/loginapp.jsf

**bps** Case Management

Newgen Case Management Framework built on top of the iBPS platform supports unstructured and dynamic processes. It allows knowledge workers to respond to unforeseeable business scenarios, while maintaining the process integrity and track ability.

**NEWGEN**

*[User Manual](#)*

### Login

User Name

Password

uiic\_live

Remember me

Newgen Software is a pioneer in the Digital Transformation space. For over two decades organizations have relied on Newgen's innovative technologies and solutions to drive smarter business decisions. Newgen through its proven Business Process Management, Enterprise Content Management, Customer Communications Management and Case Management platforms brings about the perfect amalgamation of information, content, technology and processes; the building blocks of Digital Transformation.

- After login into iBPS click **CKYCR**Report.

← → ↻ dms.uiic.in/omniapp/pages/main/main.jsf ☆

**bps** vigneshpalani

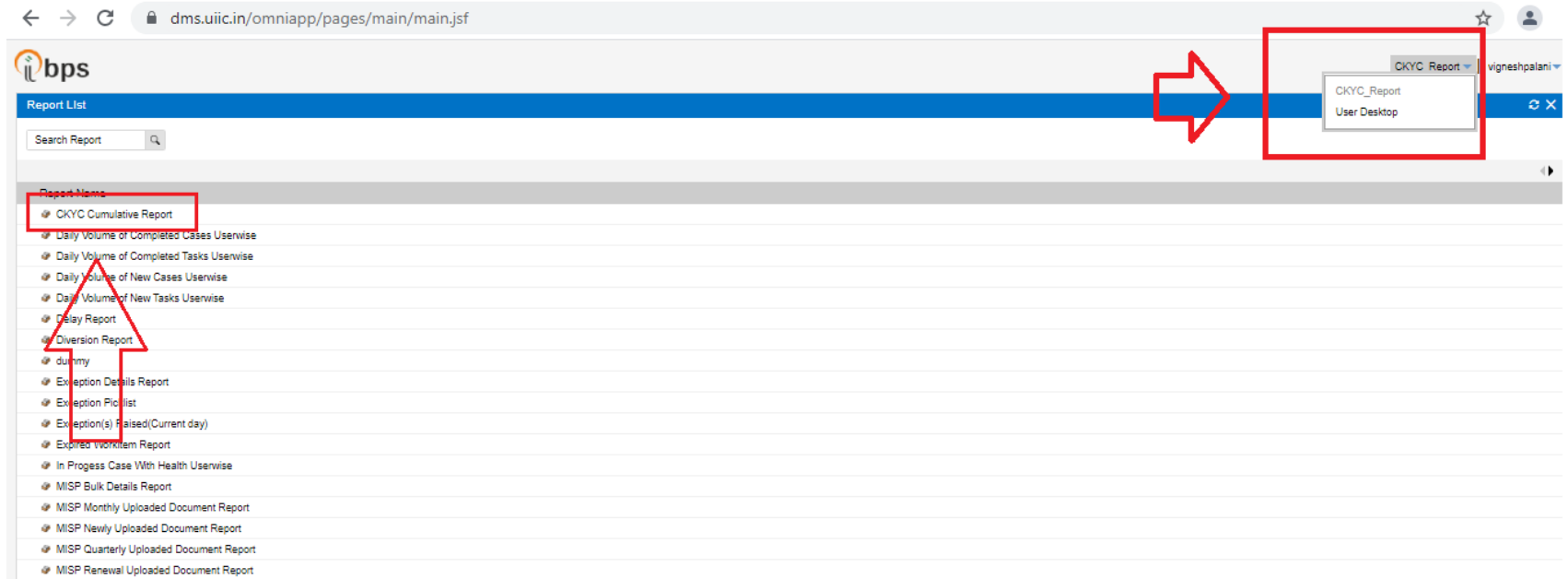
Report List

Search Report 🔍

Report Name

- CKYC Cumulative Report
- Daily Volume of Completed Cases Userwise
- Daily Volume of Completed Tasks Userwise
- Daily Volume of New Cases Userwise
- Daily Volume of New Tasks Userwise
- Delay Report
- Diversion Report
- dummy
- Exception Details Report
- Exception Pic list
- Exception(s) Raised(Current day)
- Expired Workitem Report
- In Progress Case With Health Userwise
- MISP Bulk Details Report
- MISP Monthly Uploaded Document Report
- MISP Newly Uploaded Document Report
- MISP Quarterly Uploaded Document Report
- MISP Renewal Uploaded Document Report

- After clicking the Report button, it will show the below screen.
- Then click the **CKYCR** Folder in the below screen.
- After clicking the Report icon, click on **CKYC Cumulative Report** in the below screen.



- After clicking the **CKYC Cumulative Report** icon, the below screen will appear.
- User can click on **Generate** to generate the **CKYC Cumulative Report**.

The screenshot displays a web application interface for generating reports. On the left, a 'Report List' sidebar contains a search bar and a list of report names. The 'CKYC Cumulative Report' is highlighted with a red box. A red arrow points from this report name to the main content area. The main content area is titled 'Report Designer - Google Chrome' and shows the 'CKYC Cumulative Report [Report Input]' form. The form includes a prompt: 'Enter the value for the following fields to generate the report.' Below this prompt are three input fields: 'Office Code', 'Employee No/TPA Code', and 'Workitem No'. At the bottom of the form, there are two buttons: 'Generate' and 'Clear'. The 'Generate' button is highlighted with a red box, and a red arrow points to it from the left.

□ After generating the **CKYC Cumulative Report**, the below screen will appear.

□ User can save the report with respective formats like **HTML,PDF,XLSX,CSV&TXT**.

S.N	ITEM NO	CUSTOMER ID	CUSTOMER NAME	RECORD TYPE	OFFICE CODE	POLICY NO	CLAIM TYPE	CLAIM / REFUND	CLAIM / REFUND NUMBER	CLAIM / REFUND AMOUNT	CKYC BATCH DATE	CKYC NEWGEN STATUS	CKYC CERSAI S
1	CKYC-												CESS
2	CKYC-												CESS
3	CKYC-												CESS
4	CKYC-												CESS
5	CKYC-												CESS
6	CKYC-												CESS
7	CKYC-												CESS
8	CKYC-												CESS
9	CKYC-												CESS
10	CKYC-												CESS
11	CKYC-												CESS
12	CKYC-												CESS

• "For Queries Related to CKYC Write us at [kychelpdesk@uiic.co.in](mailto:kychelpdesk@uiic.co.in)"