



April 2008 Nsite Release Notes

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New Features



1



chapter

Source File: This is a "topichead" container

Email Approval

Source File: [email_approval_topic.dita # topic_759E510CB09F46278840BAC91118A44E](#)

The Email Approval feature was introduced as a way to allow users to customize the Nsite routing process. This feature must be activated by an Administrator.

In the routing registration process, users now have the ability to set up an email template. Custom email templates allow routing notification emails to be more informative for users. This also means that users no longer need to log on to Nsite to view routing details, since the details will appear in the routing notification email.

When a user receives an email notification asking for approval of a routing, he or she is no longer required to log on to Nsite. The user can simply reply directly to the email. This will only work if the approver's Nsite email address is their primary email address.

If the user wishes to approve the routing, he or she must type one of the following words into the first line of the reply email: approve, approved, yes, confirm, confirmed, agree, agreed.

If the user wishes to reject the routing, he or she must type one of the following words or phrases into the first line of the reply email: reject, rejected, no, not confirm, not confirmed, disagree, disagreed.

The Email Approval feature supports the following email clients:

- MS Outlook
- MS Outlook Web Access
- Gmail
- Hotmail
- Blackberry

Note: Outlook Express is not supported in this release.

To activate the Email Approval feature

Source File: [email_approval_feature_task.dita # task_415CEE4902174F87BAB3CD5D2FA070DB](#)

1. Click the **Admin** button at the top of any Nsite page.
2. Under "Global Settings", click **Manage Company Global Settings**.
3. Select the "Email Approval" checkbox.
4. Click **Submit**.

Email Template Customization

Source File: [email_template_customization_topic.dita#topic_0D49C395490649C9B27B11CEF6AF354C](#)

The Email Template Customization feature has been updated to allow users to create their own customized email templates. This feature provides users with a centralized facility for managing and creating email templates with an intuitive user interface.

There are two ways to access the "Email Template List" view, where users can edit and delete email templates. The first is the General Mode, where Administrators can click **Manage Email Templates** in the "Administration" screen. This displays all the email templates, including EO definition bound email templates and general email templates. The second is the Enterprise Object (EO) definition bound Mode, where the **Manage Email Template** action is accessed through the "Manage Enterprise Objects" screen. This displays the email templates that are bound to a specific EO.

In the "Email Template List" view, a user can use the "Email Template Search" feature to find a particular email template. The search results will be presented as a list in the table at the bottom of the page.

The email template table supports pagination and column sorting, and each row in the email template table represents one template stored in the system. Each row has two buttons: an edit button and a delete button. The edit button allows an Administrator to edit a template using the authoring user interface, while the delete button deletes the template from the system.

Note: Notification transmission will fail if an Administrator deletes an email template that is being used in a notification process.

To create a new email template, click **New** in the "Email Template List" view. To edit an existing template, click on **Edit** in the email template table. Performing these two actions will bring the user to the email template authoring user interface. In the email template authoring user interface, there are four action buttons:

- **Save** - save the current template and stay on the same page.
- **Save & New** - save the current template and create another new email template.
- **Copy** - create a new email template based on this template; the new email template will inherit the template name, description, email subject and email content.
- **Cancel** - discard any unsaved changes and redirect user back to the "Email Template List" view. If the current mode of edit view is General Mode, the user will be redirected back to the list view with General Mode. If the current mode of edit view is EO definition bound Mode, the user will be redirected back to the list view with EO definition bound Mode. This action will also check whether the changes made in the current email template are saved or not.

Under "Template Contents" in the email template authoring user interface, there are two main tabs: **Edit** and **Preview**.

The **Edit** tab contains two panels: the left panel contains variables, while the right panel contains the content that the user will use to author the template. Users have the option of binding a template to an EO. If a user chooses to do this, and the template is already bound to another EO, some of the EO fields will not be transferred properly because those fields may not exist in the new EO.

The **Preview** tab allows a user to preview the email. This tab provides a tool for users to have a brief idea of what their template would look like, but it cannot fetch any data from the server; no real data will be shown in the preview mode.

The **Find a variable** input is used to search the variable tree. When a user inputs a key word, only the variables that contain the key word will be displayed in the tree. A user can add variables to both the email subject and email content, and later these fields will be substituted with real values loaded from the database. To add a field, simply click on the variable name and it will be inserted into the active text panel.

Note: In the initial release, not all variables listed in the tree are supported in every notification (for example, EO specific fields are not supported in welcome emails).

Email Template Grammar

Source File: [email_template_grammar_topic.dita #topic_BB2FEC5939B74CCBA8D052FFE37FB401](#)

You should use the field tree values instead of entering the variable syntax manually, but we have provided the variable syntax grammar for those of you that are interested, as well as the variable syntax with examples.

Variable syntax grammar

The variable syntax can be defined by the following grammar:

```
variable
  : LANGLE ( unquoted_variable_name | qualified_variable_name
  ) RANGLE
  ;

unquoted_variable_name
  : ( LETTER | DIGIT | SPACE | UNDERSCORE )+
  ;

quoted_variable_name
  : LSQUARE unquoted_variable_name ( DOUBLE_COLON identifier
  )? RSQUARE
  ;

qualified_variable_name
  : quoted_variable_name ( DOT quoted_variable_name )*
  ;

identifier
  : ( DIGIT )+
  ;

SPACE      : ' ';
UNDERSCORE : '_';
DOT        : '.';
SHARP     : '#';
LPAREN     : '(';
RPAREN    : ')';
LANGLE    : '<';
RANGLE    : '>';
LSQUARE    : '[';
RSQUARE    : ']';

DOUBLE_COLON : " :: ";
```

```
LETTER
  : 'a'..'z' | 'A'..'Z'
  ;
DIGIT
  : '0'..'9'
  ;
```

Variable syntax with examples

A variable must be surrounded by a pair of angle brackets. Each variable can be a simple and unquoted variable, or it can be a qualified and quoted variable. Please read through the following examples:

Unquoted versus Quoted variables

```
<row>
```

```
<[row]>
```

The first variable is a simple, unquoted and unqualified variable. The second variable is the quoted and qualified version of the first variable. Note that all qualified variables are "quoted" by a pair of square brackets.

Qualified variables

```
<[RECIPIENT].[FULL_NAME]>
```

```
<[RECIPIENT].[CREATED_BY].[FULL_NAME]>
```

Some qualified variables are hierarchical and their names are made up of multiple parts - the meaning of the variable depends on the context. For example, the `FULL_NAME` variable can represent two things: the recipient's full name, or the full name of the user who created the recipient (for example, this field might be useful when sending out welcome emails). How do you distinguish between the two? In this case, hierarchical naming comes into play. For this particular example, the `< [RECIPIENT].[FULL_NAME]>` variable represents the full name of the recipient while the `<[RECIPIENT].[CREATED_BY].[FULL_NAME]>` variable represents the full name of the user who created the recipient.

Qualified EO field variables

```
<[EO::123].[EO_NAME]>
```

```
<[EO::123].[DETAIL::4]>
```

```
<[EO::123].[DETAIL::4].[COL_0_1]>
```

Enterprise objects also have their own variable naming syntax. Each enterprise object (EO) variable is hierarchical, and the first component is always "EO", followed by a pair of colons, and the EO definition ID. Having the definition ID allows the template to bind to multiple EOs, but unfortunately this feature is not yet supported in the initial version.

EO header variables usually have two parts only: the EO prefix followed by the field name. An EO detail table variable follows the same syntax except the detail part is qualified by the detail table type ID. An EO detail table variable is always a variable that returns a tabular data set. These detail table variables are seldom used directly by users, unless they are used in a `foreach` loop, which will be discussed in *The #foreach Directive*.

The #foreach Directive

Source File: [email_template_directive_topic.dita#topic_18FC7580B2B84EB9AD3E24285B84F9F5](#)

The `#foreach` directive allows the template author to loop through a tabular data set (for example, an EO detail table variable) and output the data contained in the data set in a table format.

The `#foreach` directive always starts with a `#foreach` clause and ends with a `#end` clause. The `#foreach` clause should also include a pair of parenthesis. Within the parenthesis, a user can specify a row variable that serves as a placeholder variable which points to the current row of data in the tabular data set, as indicated by the table variable. The row variable name must be unique within the entire template. Unlike other variables, a row variable is defined by the user and it is nowhere to be found in the variable tree.

Example:

`foreach_statement:`

```
#foreach LPAREN row_variable IN table_variable RPAREN template
#end
```

To reference a cell value for a particular column at the current row, take the column name and qualify it by the row variable. For example, if the column name is `col_0_1`, and the row variable name is "row", then the variable would be `<[row].[col_0_1]>`.

To better understand this syntax, please refer to the following example. For this example, the "Quote" Enterprise Object has a detail table called "table_area_4". This table is represented by the `[[E0::55977]].[DETAIL::5]` variable. To display all product_sku, product_qty and product_amount values stored in the detail table as a HTML table, the user can include the following code in the template content:

```
<TABLE>
  <TR>
    <TD>SKU</TD>
    <TD>Quantity</TD>
    <TD>Amount</TD>
  </TR>
  #foreach ( <row> in <[[E0::55977]].[DETAIL::5]> )
    <TR>
      <TD><[row].[product_sku]></TD>
      <TD><[row].[product_qty]></TD>
      <TD><[row].[product_amount]></TD>
    </TR>
  #end
</TABLE>
```

Accessing the Email Template List

Source File: [email_template_accessing_list_topic.dita #topic_54A7ABDE03E64C96A19E8BC4072FF6EF](#)

There are two ways to access the "Email Template List" view, where users can edit and delete email templates. The first is the General Mode, where Administrators can click **Manage Email Templates** in the "Administration" screen. This displays all the email templates, including EO definition bound email templates and general email templates. The second is the Enterprise Object (EO) definition bound Mode, where the **Manage Email Template** action is accessed through the "Manage Enterprise Objects" screen. This displays the email templates that are bound to a specific EO.

To access the Email Template List using the Enterprise Object definition bound Mode

Source File: [email_template_eo_mode_task.dita #task_7988AFD5236D42CF811AD7ECCC97835A](#)

1. Click the **Admin** button at the top of any Nsite page.
2. Under "Application Management", click **Manage Applications & Lookups**.

3. Click **Enterprise Objects** in the menu bar.
4. In the **Select Action** dropdown menu next to the appropriate enterprise object, select **Manage Email Template**.

To access the Email Template List using the General Mode

Source File: [email_template_general_mode_task.dita](#) #
[task_2D00DE8F5FE440F9AA92E9E7A55ED108](#)

1. Click the **Admin** button at the top of any Nsite page.
2. Under "Global Settings", click **Manage Email Templates**.

Email User Security Enhancement

Source File: [ws_api_email_security_topic.dita](#) #
[topic_7D0BD1B2BB2E417AA5F7B55B35618C92](#)

An Administrator can no longer decide which "User Security" setting to apply to "Email Users", because the security settings options have been disabled. "User Security" for Nsite "Email Users" has been updated to allow only the **Normal Security** setting.

When a "Regular User (Initiator)" is changed to an "Email User", the "User Security" will automatically be set to **Normal Security** and the security settings options will be disabled.

Search and Pagination

Source File: [search_and_pagination_topic.dita](#) #
[topic_BB1010707C55463591FCC9FFB2E9A00A](#)

Search filters and pagination have been added to several Nsite pages to increase usability for users. These added features will allow users to easily access any data they require.

All of the updated pages can be accessed from the "Administration" screen.

Application Search in the Manage Applications Page

Source File: [search_manage_applications_topic.dita](#) #
[topic_977CDC7948F54DF7977D83860AB90A24](#)

An "Application Search" has been added to the "Manage Applications" page. Users can use the following search fields:

- "Name"
- "Description"
- "Status"
- "Created By"
- "Updated By"
- "Creation Date"

By default, all of these fields are set to empty or **All** so that all of the applications are loaded when the "Manage Applications" page is first opened by a user. Once a search has been conducted, the filtered results are a sub-view of the "Manage Applications" page. This means that if a user navigates to other Nsite pages and then returns to the "Manage Applications" page, the filtered results will still be displayed. Pagination on the page should be consistent with the search results.

If a user chooses to only search by "Name" or "Description", and if the value they input is part of the name or description of an application, that application will be shown in the filtered results. The "Name" and "Description" search fields are the only two search fields that require an input value. The other search fields are dropdown menus. The following options are available for the dropdown menus:

- "Status": **All** (default), **Active**, **Inactive**.
- "Created by"/"Updated By": **All** (default), **Internal company users**.
- "Creation Date": **All** (default), **Equals**, **Before**, **After**, **Between**.

The behaviours of the "Creation Date" search field are as follows:

- When **All** is selected, no Date Picker is displayed.
- When **Equals**, **Before** or **After** is selected, one Date Picker is displayed.
- When **Between** is selected, two Date Pickers are displayed.

Note: In order to for the "Creation Date" search field to be valid, these rules must be followed:

- Date format should be MM/DD/YYYY.
- If an option other than **All** is selected, a valid date must be entered.
- If **Between** option is selected, both date fields are required, and the start date must come before the end date.

Any violation of these rules will result in an error.

Enterprise Object Search in the Manage Enterprise Objects Page

Source File: [search_manage_eo_topic.dita #topic_25E06D8516694F29B7826CD09ED16746](#)

An "Enterprise Object Search" has been added to the "Manage Enterprise Objects" page. Users can use the following search fields:

- "Name"
- "Description"
- "Mode"
- "Workflow"
- "Created By"
- "Updated By"
- "Creation Date"

By default, all of these fields are set to empty or **All** so that all of the enterprise objects are loaded when the "Manage Enterprise Objects" page is first loaded. Once a search has been conducted, the filtered results are a sub-view of the "Manage Enterprise Objects" page. This means that if a user navigates to other Nsite pages and then returns to the "Manage Enterprise Objects" page, the filtered results will still be displayed. Pagination, EO tree expansion and closure on the page should be consistent with the search results.

The "Name" and "Description" search fields are the only two search fields that require an input value. The other search fields are dropdown menus. The following options are available for the dropdown menus:

- "Mode": **All** (default), **Active**, **Inactive**, **Test**.
- "Workflow": **All** (default), **Yes**, **No**.
- "Status": **All** (default), **Active**, **Inactive**.
- "Created by"/"Updated By": **All** (default), **Internal company users**.
- "Creation Date": **All** (default), **Equals**, **Before**, **After**, **Between**.

The behaviours of the "Creation Date" search field are as follows:

- When **All** is selected, no Date Picker is displayed.
- When **Equals**, **Before** or **After** is selected, one Date Picker is displayed.
- When **Between** is selected, two Date Pickers are displayed.

Note: In order to for the "Creation Date" search field to be valid, these rules must be followed:

- Date format should be MM/DD/YYYY.
- If an option other than **All** is selected, a valid date must be entered.
- If **Between** option is selected, both date fields are required, and the start date must come before the end date.

Any violation of these rules will result in an error.

User Search in the Manage Users' Roles and Groups Page

Source File: [search_manage_users_roles_and_groups_topic.dita#topic_00B26E8D40424DDFAB28FBB949D48798](#)

A "User Search" has been added to the "Manage Users' Roles and Groups" page. Users can use the following search fields:

- "Last Name"
- "First Name"
- "Organization"

By default, all of these fields are set to empty or **All** so that all of the active registered users are loaded when the "Manage Users' Roles and Groups" page is first loaded. Once a search has been conducted, the filtered results are a sub-view of the "Manage Users' Roles and Groups" page. This means that if a user navigates to other Nsite pages and then returns to the "Manage Users' Roles and Groups" page, the filtered results will still be displayed. Pagination should be consistent with the search results.

The "Last Name" and "First Name" search fields require an input value, while the "Organization" search field is a dropdown menu. If a user uses the "First Name" or "Last Name" search fields to conduct a partial search, any active registered users with names that match the input value will be displayed in the search results.

Search and Pagination in the Create/Edit Role and Create/Edit Group Pages

*Source File: [search_and_pagination_role_group_topic.dita](#) #
[topic_3337E73BE72A4DC4B593D36F3F15BB22](#)*

Pagination has been added to the "Object Access Matrix", "Application Access", and "URL Tabs Access" sections of the "Create/Edit Role" and "Create/Edit Group" pages. The pagination has been enabled so that 15 rows of each section will be displayed per page. Each of these sections has also been updated so that they can expand and collapse when a user clicks the "Expand/Collapse" icon next to each section title bar.

An Enterprise Object search has been added to the "Object Access Matrix" section only. The search will be conducted using the "Name" search field. By default, all company Enterprise Objects will be displayed when the page is loaded from any other Nsite page. The search results of the "Object Access Matrix" are per request and view is maintained within the page scope, so for the same user in the same session, returning to the page after navigation from other Nsite pages will render the default view of the "Object Access Matrix" section. If the "Object Access Matrix" section is collapsed, the search section will not be displayed.

Querying Multiple Enterprise Objects

*Source File: [ws_api_multiple_eo_query_topic.dita](#) #
[topic_756B58545E0E4642A3EBE1E9107BF286](#)*

THIS SECTION IS NOT COMPLETE -- Many users store data in more than one system. Nsite's Web Service Integration allows one system to talk to another by connecting a user's data from one system with their data in another. The main purpose of this component is to provide users with the ability to retrieve and synchronize data between Nsite and a third party system. The communication between these two systems is usually organized using Web Service API.

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Sanity Check Summary

Referenced DITA Files

Total Referenced DITA Files: 15

- /XML/en_US/other/onDemand/nSite/April 2008 Release Notes/email_approval_topic.dita
- /XML/en_US/other/onDemand/nSite/April 2008 Release Notes/email_approval_feature_task.dita
- /XML/en_US/other/onDemand/nSite/April 2008 Release Notes/email_template_customization_topic.dita
- /XML/en_US/other/onDemand/nSite/April 2008 Release Notes/email_template_grammar_topic.dita
- /XML/en_US/other/onDemand/nSite/April 2008 Release Notes/email_template_directive_topic.dita
- /XML/en_US/other/onDemand/nSite/April 2008 Release Notes/email_template_accessing_list_topic.dita
- /XML/en_US/other/onDemand/nSite/April 2008 Release Notes/email_template_eo_mode_task.dita
- /XML/en_US/other/onDemand/nSite/April 2008 Release Notes/email_template_general_mode_task.dita
- /XML/en_US/other/onDemand/nSite/April 2008 Release Notes/ws_api_email_security_topic.dita
- /XML/en_US/other/onDemand/nSite/April 2008 Release Notes/search_and_pagination_topic.dita
- /XML/en_US/other/onDemand/nSite/April 2008 Release Notes/search_manage_applications_topic.dita
- /XML/en_US/other/onDemand/nSite/April 2008 Release Notes/search_manage_eo_topic.dita
- /XML/en_US/other/onDemand/nSite/April 2008 Release Notes/search_manage_users_roles_and_groups_topic.dita
- /XML/en_US/other/onDemand/nSite/April 2008 Release Notes/search_and_pagination_role_group_topic.dita
- /XML/en_US/other/onDemand/nSite/April 2008 Release Notes/ws_api_multiple_eo_query_topic.dita

Referenced Artwork Images

Total Referenced Artwork Images: 0

(Note: Unresolved images are in **RED** color.)

Cross References (xref)

Total Cross References (xref): 0

(Note: Unresolved targets are in **RED** color.)

Related Links (link)

Total Related Links (link): 0

(Note: Unresolved targets are in **RED** color.)