1. Hierarchical Reporting Structure

- A Hierarchical Reporting structure has been introduced to provide a data structure within Nsite to represent the hierarchical reporting relationship between users in a company. The current Nsite system supports a concept called role. However, this concept is only designed for access control and there is no relationship between different roles. Under the hierarchical reporting structure enhancement, the "role" concept will stay the same, as a security concept, and a new data structure has been created to represent the reporting relationship between users.

Position Hierarchy

- A position hierarchy has been defined to support reporting relationship between users. It is somewhat similar to the "Roles" in SFDC. Each user is allowed to appear in a single position hierarchy once only. However, the administrator can define multiple position hierarchies to model the organization using different perspectives. The EO designer can then select the hierarchies that will be used by their EO for routing.

- For an administrator to define a new hierarchy:
  1. Click the **Admin** link.
  2. In the **Global Settings** section, click on the **Manage Reporting Hierarchy** link.
  3. Initially, the **Reporting Hierarchy List** view is empty.
  4. Click the **New** button to go to the **Reporting Hierarchy Designer** view
  5. To create a hierarchy from scratch, click on the **Add** button.
  6. Define the attributes of the Hierarchy as needed (eg give the hierarchy a meaningful name) and assign individuals to appropriate positions within the hierarchy.
  7. Click the **Save** button to save the completed work.
  8. Use the **Edit** or **Delete** buttons to adjust existing hierarchies.

  Note:
  - Currently outside contacts are not supported and they cannot be assigned to any reporting hierarchy.
  - If there are many hierarchies defined, the search pane can be used to help filter the hierarchies by Name, Creation Date and Last Update Date. This will filter the hierarchies that are shown in the List view. From within the List view, click the Detail button to see more detail about the specific hierarchy (and do further adjustments if needed) and click the delete (X) button to delete a hierarchy.
  - A hierarchy that is in use cannot be deleted.
  - In the Position Designer, for User Assignments the Available Users panel lists users that are not yet assigned to this position and it supports searching (by name or portion there of). The Selected Users panel shows the users that are already holding this position. Both panels support pagination in order to navigate long lists.
  - A reporting hierarchy should be edited by only one person at a time. Concurrently editing the same reporting hierarchy is not supported. Since editing a reporting hierarchy is only done by an administrator, the chances that multiple administrators need to edit the same reporting hierarchy at the same time are rare.

Import Hierarchy from CSV file

- In this release, importing from comma separated value (CSV) files is supported, to allow users to set up the reporting hierarchy with the least amount of effort. The format of the import files is predefined as described below and the import process will only support adding new positions and assigning existing Nsite users to the existing and the newly created positions. This will also be done in two ordered steps, via two separate import files:
  1) import reporting hierarchy
  2) import position assignment

  The format for the reporting hierarchy import file is 3 text columns: Name, ReportsTo, and Description. In order to specify the position name, its parent position name and the position description. For example:

Name*	ReportsTo	Description
Chief Financial Officer		CFO
Regional Vice President(EMEA)	Chief Financial Officer	VP of Sales for the EMEA region

  The format for the user-position assignments import file is 2 text columns: Position and User Id. In order to specify the position name and the related user. For example:

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Position*	User Id*
Chief Financial Officer	user1@domain.com
Regional Vice President(EMEA)	user2@domain.com

Note: * means each row is a required to have a value for this column.

- To import the positions within a hierarchy from within the **Reporting Hierarchy Designer**
  1. Click the **Import** button and select **Import Hierarchy from CSV.**
  2. Enter the necessary information into the CSV file. A template has been provided (see the Tips area for a link to sample.csv).
  3. Click the **Browse** button and navigate to the completed CSV file on your local drive and click **Open**. Note the file cannot be larger than 25MB and must be a CSV file.
  4. Click the **Submit** button to execute the import.

- Once the structure of the hierarchy is imported, to import the position assignment, from within the **Reporting Hierarchy Designer**:
  1. Click the **Import** button and select **Import Position Assignment from CSV**
  2. Enter the necessary information into the CSV file. A template has been provided.
  3. Click the **Browse** button and navigate to the CSV file on your local drive and click **Open**. Note the file cannot be larger than 25MB and must be a valid CSV file.

- **Note:**
  - When importing a reporting hierarchy structure, the system will always check to make sure each row of data is valid. Data validation will be done using the following process. Since the import process will skip rows with a non-existent parent position, it is important for the administrator writing the CSV file to order the positions carefully so that parent positions are created first:
    1. If the specified position already exists in the hierarchy, then the row will be skipped and a warning message will be displayed;
    2. If the specified position does not exist in the hierarchy:
       a. If the parent position does exist in the hierarchy, then the position will be added to the hierarchy as a reference (so no duplicate position will be created) and the system will link it to the parent position;
       b. If the parent position does not exist in the hierarchy, then the row will be skipped and a warning message will be displayed;
  - When importing user-position assignments, the following checks will be performed:
    1. If the user is already assigned to the position, then skip the row and display a warning message;
    2. If the user is not assigned to the position:
       a. If assigning the user to the position will cause the user to show up more than once in any of the hierarchies that are currently defined in the system, then skip the row and post a warning message;
       b. Otherwise, assign the user to the position.

Routing based on Reporting Hierarchy

- Up until now, routing registration in Nsite has been free form, meaning the user can pick any registered user or any outside contact to be the approver(s). With the new routing feature introduced, the participant(s) are fixed to users who reside in the selected reporting line, and an initiator cannot add or remove participant freely. Depending on the routing configuration of the EO, it can be one or more managers along the reporting line. Because the routing approvers must be in the reporting structure, it means all the participants must be registered users in Nsite; outside contacts are not supported. The Nsite application designer will have the ability to specify at design time whether the existing free-form approver selection or the reporting hierarchy will be used.

- In order to configure which hierarchy to align with when an EO is routed:
  1. Click the **Admin** link.
  2. In the **Application Management** section, click the **Manage Applications & Lookups** link.
  3. Click **Enterprise Objects**
  4. In the **Actions** drop down for the specific EO with routing activated, under **Routing…** select **Reporting Hierarchy**
  5. In the **Configure Reporting Hierarchy screen**, check the **Enable Routing by Reporting Hierarchy** checkbox (so that a check mark appears).
  6. Select the appropriate hierarchy from the **Reporting Hierarchy** drop down.
  7. Either specify the **Max # of Traverse Level** or pick the **Destination Position** (of which the drop-down list is populated from the reporting hierarchy selected).
  8. Click the **Submit** button to persist the changes. The rest of the routing initiation workflow remains unchanged. When the EO is routed, the participant list will be populated from the hierarchy chosen.

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Note:

- The routing initiator will not be able to add / remove participants that are predefined by the system with hierarchical routing; the routing hierarchy will be followed as is.
- The routing participant list is fixed after routing has been initiated statically, thus the routing will not attempt to detect any hierarchy changes or position assignment changes after the routing has been initiated. If the hierarchy does get changed after the routing has been initiated, the approver has an option to reject the routing and request the initiator to initiate another routing based on the up-to-date reporting hierarchy if that is the most appropriate action to take.

Routing escalation based on hierarchical reporting structure

- There are times when a routing approver is not available to handle the routing request. The ability to escalate to an approver's manager, after the routing has been pending for a certain period of time, has been introduced in order to help in this type of blocking situation. When automatic escalation is turned on, a routing is "transferred" from one approver to the next approver in line (which would be the immediate manager of the current approver); they receive the routing and are able to ensure it moves forward through the remaining routing process.

- The new Routing by reporting hierarchy feature supports an "Alerting" and "Automated Escalation Mechanism". An approver is allocated a time window within which they have to respond (ie to either approve or reject a routing). Just prior to the expiry of the time window, if so configured an email alert will be sent to the approver reminding them of the pending action required (ie approval/rejection). However if the approver still fails to respond within the allocated time window, then an "Automated Escalation Mechanism" is triggered whereby the next approver in line is notified (as specified by the routing's reporting hierarchy; generally the person's manager). In this way the routing is transferred from the approvers "Pending" queue to their manager's "Pending" queue. The individual who newly acquires the routing is allocated the same time window originally allocated to the initial approver and the same alerting mechanism applies.

  For an administrator enable automatic escalation:
  1. Click on the **Admin** link.
  2. In the **Global Settings** section, click on the **Manage Company Global Settings** link.
  3. In the **Automatic Routing Escalation Settings** section check the **Enable Automatic Routing Escalation for routings based on Reporting Hierarchies** checkbox (so that check mark shows)
  4. Specify the automated escalation deadline using the **Auto-escalate a routing after:** drop-down. The choices range from 15 minutes to 12 hours. This determines how long to wait after the routing is overdue.
  5. Specify the time to send out a notification reminder by using the **Send a notification before the routing gets escalated** drop-down, choosing between 10 minutes and Disabled (which means no notification is sent).
  6. Click **Submit** to save the changes and confirm that Automatic Routing Escalation has been enabled.

- **Note**:
  - It is recommended to have the Escalation Time less than Routing Post Due Time
  - The Escalation Reminder Time must be less than the Escalation Time
  - When escalating a routing automatically, notifications will be sent to the initiator and the original participant – they will receive a notification saying that the routing has been escalated to a different person. Once the routing has been escalated, the original participant will have no rights to modify the routing anymore. The new routing participant will receive an ordinary routing approval notification.

2. Search Routings

- Searching filters have been added to make it easier to locate a particular routing. The Routing Search link is available wherever routings can be viewed, alongside the View Routings links. Selecting the link will initially show all routings in the Search Results pane. Note that if you navigate to the Routing Search page from an EO Tab, the corresponding EO tab will remain highlighted.

- Users can now use the following routing search criteria:
  - Application
  - Description
  - Direction
  - Archived
  - Initiator
  - Started date, Received date, Completed date
  - Priority
  - Routing State (ie in progress, approved, rejected, stopped)

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- If a user chooses to search by “Description”, and if the value they input is used in any existing routings, those routings will be shown in the search results. The “Description” is the only search field that requires an input value. The other search fields are dropdown menus or check boxes. The following options are available for the dropdown menus and check boxes:
    - “Application”: **All Applications** (default), **specific company applications**
    - “Direction”: **Both** (default), **Sent**, **Received**
    - “Archived”: **Both** (default), **Archived**, **Not Archived**
    - “Initiator”: **Any user** (default), **Internal company users**
    - Dates: **=** (equal, default), **>** (greater than), **>=** (greater than or equal), **<** (less than), **<=** (less than or equal), **between**
    - Priority: 3 checkboxes are available to select individually (**Normal, High, Urgent**)
    - Routing State: 4 checkboxes are available to select individually (**In Progress, Approved, Rejected, Stopped**)

- **Note**:
    - For the Application search field, all available company applications will be listed including Smart Forms, Process Applications and Enterprise Objects. Different versions of the same Enterprise Object are not displayed separately, so instead of “Quote v.1 Active” and “Quote v.2 Test” just “Quote” will be listed.
    - For the State and Priority checkboxes, clicking any of the checkboxes so that there is a check mark shown will include routings of that state or priority in the search. Clicking the checkbox so that it is empty will result in routings of that state or priority not being included in the search. By default, all checkboxes are on, so that all routings in any state and of any priority will be included in the search.

- The behavior of the date search fields is as follows:
    - When Between is selected, two Date Pickers are displayed
    - For all other choices, use the one Date Picker to select the comparison date
    - The date can be directly entered into the date input field manually if desired (ie using the date picker is not required, although likely helpful). Additionally, if the date picker is used to generate a date for the input field, that date can be manually edited further.

    Both dates such as **17 Jun 1008 15:43** or **17 Jun 2008** (ie with or without time) can be used. If the search criteria is “**= 17 Jun 2008”** then all routings for that day will be retrieved. If it is “**= 17 Jun 1008 15:43”** all routings in that minute will be retrieved.

- Within the Search Results pane, by clicking on the header of the column the user can select sorting (ascending or descending) and the set of displayed columns in order to refine the results that are displayed as desired.

3. Batch Archiving

- In addition to being able to individually archive completed routings from the View Completed Routings screen multiple routings can be now be archived from the Routing Search screen.

  To archive multiple routings:
    1. Use the Routing Search criteria to locate the routings to be archived
    2. Within the Search Results pane, to select routings to be archived:
        a. Click the **Select All** button to select all routings on the current page, or
        b. Click on the checkbox in the **Select** column so that it displays a check mark for those individual completed routings that are to be archived.
    3. To deselect routings that were selected in error:
        a. Click the Clear Selection button to deselect all previously selected routings on the current page, or
        b. Click on the check mark in the **Select** column so that the check mark disappears for those individual routings that are not to be archived.
    4. Click the **Archive Selected** button near the bottom of the screen and this will perform the archive action.

- **Note:**
  - The **Select All** button can be used to easily select all of the routings on the current page only. That is, if there are multiple pages of routings matching the search criteria, only those routings on the displayed page will be selected. After completing the archival of the selected routings on the current page, navigate to the subsequent page(s) to select additional routings to archive if desired.
  - After navigating from one page to another and back to the original page all selections will be cleared. This again highlights that archiving the selected routings only applies to the routings that are selected on the current page.
  - Once archived, the **Archived** column in the Search Results pane will display the “Archived” label. The archived routings will also show in the Archive section of the View Routings screen.
  - Only completed routings will be archived. The user will be able to select "in progress" routings for archival on the Routing Search screen, however, when the **Archive Selected** button is clicked to execute the archive

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action, only those routings that are completed will actually be archived. If any “in progress" routings had been selected, they would not have been archived; that is, they can be selected successfully within the UI, however the archive action cannot be completed for them.
  - A routing can still be “in progress” overall, but completed for an individual participant(s) when that participant has taken an action and the routing is then waiting for the action of the next participant. In this case, the participant who has already taken action is able to archive the routing (ie since it is completed from their perspective). Archiving routings individually has previously followed this behavior; it is not new.

4. EO Mapping Filters

- The ability to define custom filtering for EO-to-EO mappings was introduced to allow users to apply a predefined filter to a group of EOs shown in the EO Lookup dialog, associated with a button or table that has an EO mapping. The idea is to restrict the set of results displayed based on the nature of the mapping. For example, there may be a Product EO with type that can be Software, Hardware, Cars, Clothes, etc and there is an Order EO, which has a few tables: Software products, Hardware Products, Inexpensive products, etc.

- To define a custom filter for EO mapping from within the **Enterprise Object Builder**:
  1. Ensure the desired Enterprise Object is chosen in the **Select Enterprise Object** drop down list
  2. Click the **Enable filter** checkbox (so that a check mark appears)
  3. Click the **Mapping Filter** link
  4. In the **Define EO Filter** pane, select an existing filter or create a new filter by clicking the **Add filter element** button
  5. For a new filter element, fill in the filter definition fields as desired; multiple filter elements can be created
  6. Click the **Save Filter** button to save the filter just defined

  Users can set the filter element fields:
  - Field: drop down list of available fields
  - Operator: drop down list varying depending on field type
  - Value: drop down list varying depending on the field value chosen

  The following operators are available:
  - For string fields (textbox and text area): **Operator List:** = , <> (not equal), starts, ends, contains
  - For numeric and date fields: **Operator List: >, >= ,< ,<= ,= , <>**
  - For dropdown and radio button groups: **Operator List:** =, <>, in, not in
  - For checkboxes: **Operator List:** =

  Note:
  - After a filter is created and applied to a button or table with EO mapping, it is still possible to detach that filter and/or delete it.
  - Mapping defines which fields of source EO are going to be inserted into header or detail fields of target EO; and a filter applies to source EO, and only to headers fields of it.
  - A filter element consists of field of source EO, operator and value. The set of EOs shown when a filter is applied is restricted to those EOs which satisfy each condition represented by all elements in the filter

- The filter is assigned to a mapping when the mapping is saved by clicking the usual Save button; the filter is saved as well in that moment. If a filter is assigned to mapping, the next time the mapping is edited – the filter is shown there. If a filter itself is saved, even if it is not assigned to a mapping, the next time the mapping for the same source EO is defined – the filter is shown in the list of possible filters.

- Filters can be saved and reused. A filter is associated with a source EO, so whenever this source EO is used in an EO mapping, existing filters can be used as well as new one can be created. When list of EOs with applied filter is shown, the filter name is displayed, so that it is clear the filter being used to determine which items are displayed, and that the full list of EOs is not being shown.

- Filters can be created, modified and deleted by any user with Application Developer rights. If a filter is deleted that is in use by some EO – the corresponding lookup dialog will show a warning and and all EOs will be shown (as though there were no filter applied). Similarly if the source EO is modified after a filter is created, so the filter contains fields that no longer exist in the source EO and thus the filter has become invalid – the corresponding lookup dialog shows a warning, however no EOs are shown in the lookup dialog (ie no results are displayed).

- **Note**:
  - EO filters do not apply to standalone dropdown mapping.
  - Currently mapping itself (source EO and fields) is defined separately from mapping type of detail table (Lookup or Add mode). This requirement applies to the Lookup EO dialog, which takes place for header link/button mapping and detail table mapping with Lookup mode, because mapping with Add object mode does not show lookup dialog again. Filters will not be applied for Add object mapping.

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5. Email Approval/Rejection with Comments & Forwarding

- Recall that for the company administrator to enable email approval:
  1. Click the **Admin** link 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**

- Also recall that when a user receives an email notification asking for approval of a routing, they are no longer required to log on to Nsite. The user can simply reply directly to the email. This will only work if the approvers 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 (case insensitive): approve, approved, yes, confirm, confirmed, agree, agreed. Do not include punctuation on this line.

  If the user wishes to reject the routing, they must type one of the following words or phrases into the first line of the reply email (case insensitive): reject, rejected, no, not confirm, not confirmed, disagree, disagreed. Do not include punctuation on this line.

- In addition to their approval or rejection, the user is now able to include a comment or note as part of their email reply. They can do so by starting a note on a line following the line with the approve or reject key word. The text of the note must be enclosed within 2 tags: [Note] and [/Note]. That is, the first [Note] tag signifies the start of the note, the second [/Note] tag marks the end of the note. The note will be added to the routing detail history (which can be viewed via the Web UI) and will be sent via email to the routing initiator and to all participants.

  For example, to approve a routing and include a public comment/note, the user would reply to the routing email as follows:

  Agree
  [Note] Hi Guys,
  I'm approving this.
  Thanks,
  George [/Note]

  Just as when using the Web UI, a user can post notes which are public or directed (private) to a particular routing participant, this is also the case via email. To post a public note, use the **[Note] [/Note]** tag as described above. To post a directed note use the following syntax: **[Note:user1@domain.com]**This is text of the note for only user1. **[/Note]**. By specifying the email address of a specific participant in the approval chain within the first note tag, the associated note text will be sent only to that participant, not to any other of the routing participants. And to post a directed note to the initiator of the routing use the **[Note:initiator] [/Note]** tags.

- The user can now also forward a routing to add another participant to the routing via their email reply. The option to allow this functionality needs to be configured during routing registration:
  1. Navigate to the Routing Registration page
  2. Select the "Yes" radio button next to "Allow participants to add approvers to the routing"

  And use the following tags in the body of the routing email reply to add approvers or reviewers:
  - [**AddApprover]**email address of existing user**[/AddApprover]**
  - **[AddApproverNotInSequence]**email address of existing user**[/AddApproverNotInSequence]**
  - **[AddReviewer]**email address of existing user**[/AddReviewer]**
  - **[AddReviewerNotInSequence]**email address of existing user**[/AddReviewerNotInSequence]**

  Using these forwarding tags the routing email will be forwarded only to one person; in order to forward the routing to another Nsite user(s) as well, use additional [AddApprover] tags. For example, to add two approvers who will be added to the routing approval in sequence based on the order they are added in the email (ie first user1, then user2) add the following two lines to the email:
  [AddApprover]user1@domain.com[/AddApprover]
  [AddApprover]user2@domain.com[/AddApprover]

  Note:
  - Outside contacts can send public notes (ie using **[Note][/Note]** tags), however they cannot send directed notes.
  - Only registered users can forward routings, an outside contact cannot forward routings.

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- Multiple notes can be specified in the body of one email (for example the user might want to send both a public and several directed notes at the same time). And posting one or more notes can be used together in one email along with other Approve, Reject or Forward operations.
- A routing email can be forwarded to a registered user or an existing outside contact, but cannot be forwarded to an email address that does not belong to the company.
- The forward routing operation is only available for the current routing participants (although this includes both approvers and reviewers).
- If the routing is completed (stopped, rejected, approved) participants will only be able to add reviewers (ie CC participant), the routing cannot be forwarded to any additional approvers.
- "InSequence" means the routing notification will be sent to one participant at a time after the approver in front of them has approved the routing. This is in contrast to "parallel" which means the routing notification is sent to all the participants at the same time.

- It is important to remember that when using the new email tags for forwarding or adding comments to an email approval/rejection of a routing, the user absolutely needs to get the tags correct (ie use the **precise spelling** for Note, AddApprover, AddApproverNotInSequence, AddReviewer, AddReviewerNotInSequence). Correctly spelled tags are the only way for the Nsite system to determine the difference between what is a tag and what is user text/content.

  In order to receive some help on the various tags available, the user can type the word **Help** in the first line of the email and then send. They will receive back an email with helpful information which describes all existing functionality for email approval including some examples of usage.

6. Image Control

- A new component has been added to allow users to attach images to their forms. Images are stored in an image store or repository and they can be shared among EOs and, if desired, with other users in the company.

- To add an image control to a form:
  1. In the Application Designer, click the **Customize** button
  2. From the **Controls** section of the developer's palette, drag and drop the **Image Control** into an appropriate area on the form. As for any control, the mouse-over icon displays an icon showing that you can add a control to an area or not.
  3. In the **Control Properties** section of the developer's palette, specify the properties of the image component as desired.
  4. Click the **Save** button.

  Note: Image controls cannot be placed in a grid.

  Users can set the following Control Properties for image controls:
  - Name: free form input; defines the programming name for the control used when identifying the control elsewhere
  - Alignment: **Left, Right, Center**
  - Width: input number (in px = pixels)
  - Height: input number (in px = pixels)
  - Default image: activates Image Search screen to allow selection of the default image which will be used for new instances of that EO; if nothing is selected an image placeholder is displayed.
  - Data Visibility: allows only the selected user definition to see the control (via Data Visibility Options dialog)
  - Edit Privilege: allows only the selected user definition to edit the control (via the Edit Privilege Options dialog)
  - Routing edits: **Never** (default), **Enable edits when routing is in progress**, **enable edits after routing**, **enable edits during and after routing**.

  Note:
  - At design time, the user can specify the size of the image component in pixels via the width and height properties. The image size will be fixed at runtime, but the user can click on the image name on the properties tab to see a larger sized version in a pop up window.
  - If the image component is editable, the user can select the image at runtime. Rules to determine if control is editable are the same as for other components – based on Routing status, Routing Edits settings, Edit Privilege and the Role based Access Control (RBAC). This applies similarly to visibility.

- To delete an image control from a form:
  1. In Application Designer, click the **Customize** button.
  2. Select the desired control, and then delete it by pressing the **Ctrl** and **Delete** keys at the same time.

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- In the Application Designer, the **Default Image** property of the image component contains a link to the default image and a button to choose it. Clicking the button opens the "image store" (via the **Image Search** screen) where the user can select an image to be inserted or where they can manage the images already in the store. Clicking on an image in the Application Player (if the component is editable) also leads the user to the same "image store". In the "image store" a regular user can see all the images uploaded by them plus the shared images uploaded by other users; administrator can see all images uploaded by all users in the company.

  To select an image to be inserted from the **Image Search** screen:
  1. On the **Image Search** pane, use any combination of the image search criteria to filter images among those that the user can see within the image store:
     a. Click the **Search** button to execute the search, given the criteria specified
     b. Click the **Clear** button to clear the criteria (shows all images in results pane; which is the default view)
     c. Click the **Cancel** button to close the Image Search screen
  2. Click the view radio buttons to toggle between **Detail view** and **Thumbnail view**
  3. Within the **Images** results pane:
     a. Click on the image **Name** to select an image to be inserted
     b. Click the **View** icon to view the image at full size

  Users can use the following image search criteria:
  - **File name**: If a user chooses to search by "File name", and if the value they input is all or part of the name of any existing images in the image store those images will be shown in the search results.
  - **Created by**: this search field is a drop down list and has a default value of **Any User**; alternatively the user may select from the list of all **internal company users**.
  - **Created after, Created before**: these search fields are dates values. The date can be directly entered into the input field manually if desired (ie using the date picker is not required, although likely helpful). Additionally, if the date picker is used to generate a date initially, that date can be manually edited further.

  Note:
  - Thumbnail images are created from the original by proportional resizing; they will appear as a small copy of the original.
  - The detail view will appear faster than the thumbnail view (as there are no images to retrieve/draw); as a result, this view is the default view.
  - In both thumbnail and detail views the images listed are shown using pagination; use the navigation buttons (eg First, Prev, etc) to navigate through the pages. The detail view will always contain more records per page than the thumbnail view. And images are sorted by share flag (shared first), then by name.

  To add images to the image storage from **Image Search** screen:
  1. Click the **Add Image** button
  2. From the **Upload Files** screen up to 5 images can be added at one time. For each of the files to be uploaded:
     a. In the **File** input box, specify the name of the image file, including path. The **Browse** button can be used to navigate via the Windows **Choose File** dialog to locate the image file on a local drive; only one file can be chosen at a time. Once the file is located, click **Open**.
     b. Click the **Share** checkbox (adding a check mark) if the resulting uploaded image can be seen by other regular users in the company; if left unchecked the image cannot be seen by other regular users.
     c. Specifying a **New Name** for the image to be stored is optional. If not specified the original image name is used.
  3. Click the **Submit** button to perform the upload of the image file(s) into the image repository.

  Note:
  - When uploading images, if a naming conflict happens, a warning message is shown and the image is not saved. A conflict will happens in two cases:
    1. the user uploads a shared image when another shared image with the same name already exists
    2. the user uploads non-shared image when another non-shared image with the same name for the same user already exists

    It is not a conflict to have many non-shared images with same names for different users since. In this way a regular user will not see more than one image with same name; an administrator may see more than one image with the same name because they can see the non-shared images of all users.
  - Normally individual images cannot be larger than 2MB; if this size limit is exceeded a warning message is shown and the image is not saved to the repository. The Tips link on the Upload Files screen provides guidelines on the size of the images that can be uploaded.
  - Only files of image type will be allowed. If the file chosen to be uploaded is not an image, a warning will be shown and the file will not be saved within the image storage.
  - The user cannot change the shared status or the name of the image after it is uploaded.

  To delete an image from the repository from the **Image Search** screen:
  1. On the **Image Search** pane, use any combination of the image search criteria to filter images
  2. Within the **Images** results pane, click the X in the **Delete** column (or on the right corner of the thumbnail) to delete an image from the image repository

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3. A dialog confirming the deletion will appear; click **OK** to confirm or click **Cancel** to abort the deletion.

Note:

- Users can delete images that they have uploaded. In doing so, the image is deleted permanently from the image storage database. Any EOs which contain the deleted image will show an "image deleted" placeholder.

7. Enhanced Universal Web Services (UWSC) Driver

- Users can now create Crystal Reports off detail table data in Nsite Enterprise Objects (EOs). The detail table is accessible in the report creation wizard as a database table. For example, the "Products" detail table in the "Quote" EO will be exposed as [Quote/Products].
- If you add both the master EO table and its detail table to the main report, the 2 tables will be automatically linked through the master table's id field and the detail table's detail_parent_master_id field (note that this id is generated by the UWSC driver). It is important to maintain this link in order to ensure your Nsite application data is represented correctly in the report. If you need to report off multiple detail tables in one EO, it is recommended that you put the EO master table in the main report, and create sub-reports off the detail tables, one in each subreport, and insert the subreports into the detail section of the main report.
- It is recommended to select the "Show Description" option in the data connection options dialog to display a user friendly table alias in the report creation wizard. If you have multiple versions of the same EO in the system, and need to distinguish the versions, you can select the "Show Both" option to display both the table name (unique EO id) and the user friendly table alias.
- New customers will have sample reports automatically uploaded in their CR.com space under the "Application Sample Reports" folder. The sample reports are created based on the definition and data from the sample Quote and Proposal Application, and are not refreshable. If you want to connect the sample reports to the sample application in your Nsite company, please follow the instruction in "How to modify sample report to connect to Nsite live data.doc".
- After logon to Nsite, the user can SSO to CR.com, and the Nsite access rights will apply and control the data that is available to the user when viewing the Nsite reports. There is no additional logon required when refreshing the reports. However, if the user logs onto the CR.com portal, and refreshes reports, the user will be prompted to enter Nsite logon credentials to access Nsite data.
- Only one data connection with UWSC should be used for each report. Multiple data connections are not supported at this time. Also note that reporting off EO with version enabled is not supported (i.e. EO with the version check box checked in the EO edit page).

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