



# Nsite 2008 October Release: What's New

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Reporting hierarchy routing  
enhancements

1

chapter



The new features in the October release make routing by reporting hierarchies more flexible and customizable. Hierarchy-based routing now has a new user interface, and includes the following functions:

## **Hierarchy shaping**

You can set destination and origin positions for each hierarchy that you add to a routing sequence.

## **Hierarchy chaining**

You can chain together unrelated parts of one or more hierarchies in the same routing sequence.

## **Optional approval**

In previous versions of Nsite, free-form routing initiators could add users as optional participants. When creating a hierarchy-based process control, you can now select which positions will be optional. These selections are enforced when the routing is initiated.

## **Cascade filtering**

You can filter a routing using a separate hierarchy. This feature allows geographically-aware routing, for example.

### **Related Topics**

- [To set origin and destination positions](#) on page 9
- [Hierarchy chaining](#) on page 9
- [To define approval requirements](#) on page 12
- [Cascade filtering](#) on page 16



# Configuring a reporting hierarchy routing sequence



# 2

chapter

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## To configure reporting hierarchy routings

Before performing these steps, you must have a pre-defined and populated reporting hierarchy.

The user interface for creating a routing sequence using reporting hierarchies has changed in this release. Follow these steps to configure a reporting hierarchy routing:

1. Click **Admin**, then click **Manage Applications & Lookups**.
2. Click **Enterprise Objects** and locate a workflow-enabled enterprise object (EO) to configure its routing sequence.
3. Click **Process Control** from the **Actions** list.
4. Open a process control.

You can click the name of a pre-existing process control, or click **Create New Key Control** to configure a new process control. The control can be a default control or key control — see the *Process Controls* section of the *Nsite Online Help* for more information.

5. Select **Route by Reporting Hierarchy** and click **Configure**.

The "Reporting Hierarchy Routing Configurator" dialog box appears.

6. Click **Add** to access the list of reporting hierarchies.
7. In the "Add a Reporting Hierarchy to the Sequence" pane, select a **Reporting Hierarchy** and click **Add**.

The reporting hierarchy is added to the routing sequence.

By default, any position in the hierarchy can initiate routings. The destination is the topmost position. All participants are also required to approve the routing.

If necessary, you can customize the routing sequence further. You can:

- Set origin and destination positions.
  - Chain other hierarchies to the sequence.
  - Specify optional approval for one or more positions.
  - Filter the positions with another reporting hierarchy.
8. Click **Save** when you have finished configuring the routing sequence. Click **Submit** to activate the new process control.

### Related Topics

- [To set origin and destination positions](#) on page 9
- [Hierarchy chaining](#) on page 9
- [To define approval requirements](#) on page 12
- [Cascade filtering](#) on page 16

## To set origin and destination positions

Create a process control and add a reporting hierarchy to the sequence before following these steps.

When you create a process control based on a routing hierarchy, the default routing path goes from **all positions** to **the topmost position**. However, you can customize the routing path by setting specific origin and destination positions.

1. Open the "Reporting Hierarchy Routing Configurator" dialog box for the process control that you want to edit.
2. To set an origin position for a hierarchy, click the origin position link. (By default, the link text reads **all positions**.)  
The reporting hierarchy appears in the "Hierarchy Shaping" pane.
3. Click the arrows next to each position to expand the hierarchy, and locate the origin position in the reporting hierarchy.
4. Click the origin position and click **Mark Origin Position**.  
The origin position is added to the "Hierarchy Shaping Rules" list and the hierarchy routing description. Only this position can initiate routings.
5. To set a destination position for a hierarchy, click the appropriate position and click **Mark Destination Position**.  
The destination position is added to the "Hierarchy Shaping Rules" list and the hierarchy routing description.
6. To restore the default origin or destination position, click the appropriate entry in the "Hierarchy Shaping Rules" list and click **Remove**.
7. When you have finished configuring the routing, click **Save**.

## Hierarchy chaining

Hierarchy chaining describes the creation of links between disconnected parts of one or more reporting hierarchies.

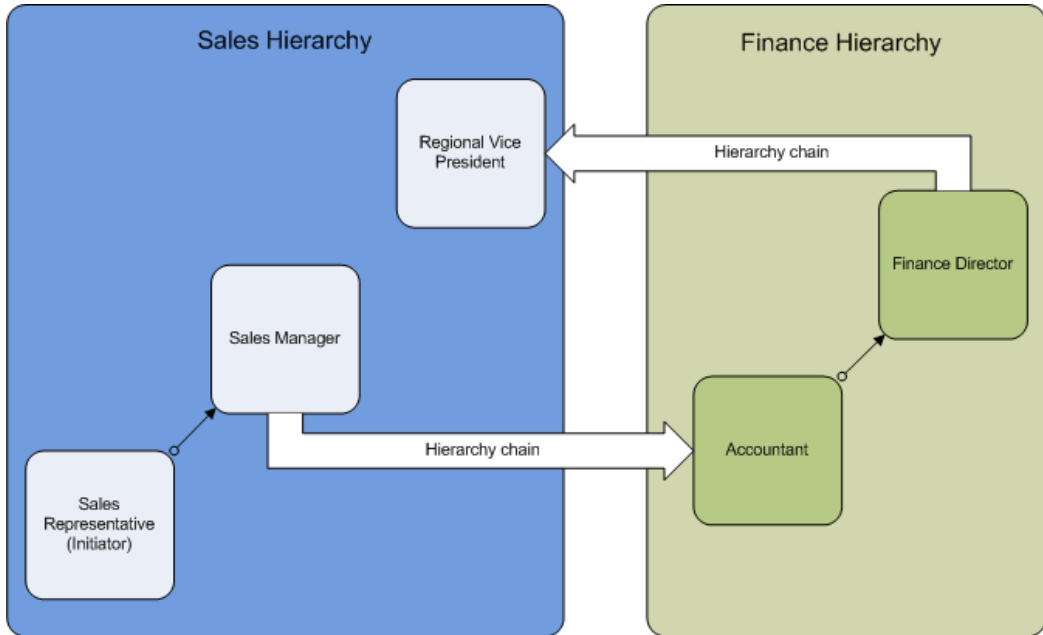
This feature allows you to:

- Chain two or more parts of the same hierarchy together.
- Chain one hierarchy to another hierarchy.

There are some circumstances where a routing needs approval from members who do not have direct relationships in a hierarchy. In such cases, you can chain one hierarchy to another hierarchy, or to another branch of the same hierarchy. It is possible to chain several hierarchies or parts of hierarchies together in the same process control. Combined with the ability to specify origin and destination positions for each hierarchy, this feature makes routing by hierarchy highly customizable.

### **Example:**

You have a workflow-enabled enterprise object (EO) for generating and approving quotes. Quotes need to be approved by a sales manager and a regional vice president. These positions are in the “Sales” hierarchy. However, quotes must also receive approval from an accountant and a finance director. These positions are in the finance department, which has a separate reporting hierarchy.



You create a default control for the quote EO. You configure this key control to route by reporting hierarchy, and add the “Sales” hierarchy. You set the sales manager as the destination. Next, you add the “Finance” hierarchy, establishing the accountant as the origin and the finance director as the destination. Finally, you add the “Sales” hierarchy again, and set the regional vice president as the origin and destination position.

When a sales representative routes a quote, the sales manager will receive it first. The next approver is the accountant, followed by the finance director. The regional vice president then receives the quote and can give the final approval or rejection.

## To chain hierarchies

Before performing these steps, you must have one or more pre-defined and populated reporting hierarchies.

1. Open the "Reporting Hierarchy Routing Configurator" dialog box for the process control that you want to edit.
2. Click **Add** to access the list of reporting hierarchies.

3. In the "Add a Reporting Hierarchy to the Sequence" pane, select a **Reporting Hierarchy** and click **Add**.  
The reporting hierarchy is added to the routing sequence.
  4. Select a hierarchy to chain to the original hierarchy and click **Add**.  
You can add multiple hierarchies in this manner. If necessary, you can add the same hierarchy more than once.
  5. Arrange the hierarchies in order using the **Move Up** and **Move Down** buttons.
  6. Specify the origin and destination positions for each hierarchy.  
The origin position of the first hierarchy is the routing initiator. The routing continues to the destination position of this hierarchy, and then is passed to the origin position of the second hierarchy, and so on.  
If you want only one position in the hierarchy to participate in the routing, mark that position as both the origin and the destination.
- Note:**  
You do not have to set an origin position for the first hierarchy or a destination position for the last hierarchy. However, all other origin and destination positions must be specified.
7. Click **Save** when you have finished configuring the routing sequence.  
Click **Submit** to activate the new process control.

#### Related Topics

- [Hierarchy chaining](#) on page 9
- [To configure reporting hierarchy routings](#) on page 8

## To define approval requirements

Before following these steps, create a process control and add a reporting hierarchy to the sequence.

If certain positions in a hierarchy do not need to approve the routing, you can set them as optional positions. Setting positions as optional clears the **Approval Required** check box in the "Routing Registration" screen. Thus, these participants are added as reviewers (also known as CC participants) rather than approvers.

1. Open the "Reporting Hierarchy Routing Configurator" dialog box for the process control that you want to edit.

2. In the "Reporting Hierarchy" list, click the approval link for the appropriate hierarchy. (This link reads **all positions** by default.)  
The "Define Approval Requirement" pane appears.
3. Click the arrows next to each position to expand the hierarchy, and locate the positions that do not need to approve the routing.
4. Click an auto-approve position and click **Make Optional** to add it to the "Positions that do not require approval" list.
5. To change an optional position to a required position, click the position in the "Positions that do not require approval" list and click **Remove**. Click **Remove All** to change every optional position to a required position.
6. When you have finished setting approval requirements, click **Save**.

When a user initiates the routing, the **Approval Required** option is deselected for all participants from the "Positions that do not require approval" list. The initiator cannot change these settings in the "Routing Registration" screen.

#### Related Topics

- [To configure reporting hierarchy routings](#) on page 8

## 2 | Configuring a reporting hierarchy routing sequence *To define approval requirements*



Configuring options for a reporting hierarchy routing



3

chapter

## Limiting maximum traversal

This option functions in the same manner as the “Maximum Number of Traverse Level(s)” in the previous version of the reporting hierarchy routing feature.

You can limit the maximum number of positions that a routing traverses. For instance, if you set the maximum traversal limit to five, the initiator can send the routing only to the first five positions in the routing sequence.

However, if the entire routing sequence is shorter than the maximum number of traverse levels, this option has no effect.

## To limit the maximum number of traverses

Create a process control and add a reporting hierarchy to the sequence before following these steps.

1. Open the "Reporting Hierarchy Routing Configurator" dialog box for the process control that you want to edit.
2. Click **Options**.
3. Click **Limit Maximum Traversal**.
4. Type the maximum number of traverses in the text box.
5. Click **Save**.

### Related Topics

- [To configure reporting hierarchy routings](#) on page 8

## Cascade filtering

Cascade filtering allows you to filter out routing participants who do not occupy the appropriate branch of a second hierarchy.

Your company might have several members occupying each position, and often it is not necessary for each of them to approve a routing. You can use cascade filtering to ensure that a routing is sent only to the appropriate members of each position.

A common use for cascade filtering is the creation of geographically-aware routing sequences.

**Example: Geographically-aware routing**

You have a global “Sales” hierarchy, where most positions are occupied by employees from several different countries or regions. Without cascade filtering, each member of a position has to approve or review a routing when that position is included in the sequence. A sales manager for the Eastern US, for instance, might have to approve quotes from Japan.

To solve this problem, you create another hierarchy that assigns territories to each member of the “Sales” hierarchy. The positions in this “Territory” hierarchy would each be geographical regions. For instance, the base positions might be individual countries, the parent positions would be regions, and the topmost position would be “World”.

After configuring the two hierarchies, you create a routing sequence with the “Sales” hierarchy, and then select the “Territory” hierarchy as the cascade filtering hierarchy.

When a user initiates a routing that uses this sequence, members who are not in the same territory (or a parent territory) are excluded from the routing.

For instance, if a sales representative from Japan initiates a routing, the next recipients are the sales managers from Japan. If no sales manager is assigned to Japan, then the Asia-Pacific region (Japan's parent position in the “Territory” hierarchy) is searched for a sales manager. This process continues until a sales manager is found or the uppermost position in the territory hierarchy is reached. Sales managers from unrelated territories such as China or the Americas region do not receive the routing.

**Note:**

If no members of a participating position exist in the same territory or any of its parent territories, the routing cannot be initiated. For this reason, you must define each hierarchy carefully and ensure that managers are assigned to appropriate territories.

Cascade filtering can also be used in routings that include multiple hierarchies, as long as members of each of the routing hierarchies are included in the filtering hierarchy.

## To filter routing participants by a hierarchy

Before using cascade filtering, you must:

- Create and configure a reporting hierarchy routing sequence.
- Create a filtering hierarchy that contains each member of the routing sequence's hierarchies.

1. Open the "Reporting Hierarchy Routing Configurator" dialog box for the routing sequence that you want to filter.
2. Click **Options**.
3. Click **Enable Cascade Filtering**.  
The **Reporting Hierarchy** list appears.
4. Select the filtering hierarchy from the **Reporting Hierarchy** list.
5. Click **Save**.

When a routing is initiated with this process control, the participants will be filtered by the hierarchy that you selected.

**Note:**

Members of the routing hierarchy who are not part of the filtering hierarchy are never included as routing participants. If no member of a participating position is part of the appropriate positions in the filtering hierarchy, the routing cannot be initiated.

If a participating position in the routing hierarchy has no members in the appropriate positions of the filtering hierarchy, the routing cannot be initiated.

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