



Nsite 2008 November Release: What's New

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New features overview



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chapter

The November release of Nsite includes the following new features:

Enterprise Object bundles

Using this feature, application designers can create simple hierarchical relationships among an enterprise object's (EO) instances. Nested tables allow users to create bundles of EO records using an Enterprise Object Builder mapping.

Application designers can also designate a substitute table for the EO bundle. This table allows users to customize EO bundles by substituting related instances.

Enterprise Object Builder enhancements

Three new features enhance the functionality of data mappings from one EO to another:

- **TopN mapping filter:** using the new **Nth largest** and **Nth smallest** operators, application designers can sort source EO records based on the selected field and control the number of records retrieved by the mapping.
- **Interactive Lookup** option: application designers can deselect this option to allow the automatic population of target fields for mappings.
- **Filtering by dynamic control values:** application designers can use controls from an EO form as dynamic inputs for filters.

Routing approval enhancements

The **Approval Type** list has been added to the "Configure Routing by Reporting Hierarchy" screen. Application designers can choose an approval type for each position, allowing them to customize and streamline the approval process.

The **Approval Type** list includes a new approval method for hierarchical routings. With **Approve by One**, the routing advances to the next position as soon as one position member approves it.

Routing notifications enhancements

Two new features make routing notifications more reliable and customizable:

- **Disable Email Notifications When Delegation is in Effect** option: users who have delegated their routings can choose not to receive email

notifications for the delegated routings. Administrators can also configure this option for any user.

- **Resend Routing Notification** button: in case an email notification is lost, routing initiators can resend notifications to in progress participants.

Customizable user interface

Two new features allow administrators and application designers to customize the appearance of the Nsite interface:

- **Customize EO views** in the "Application Builder" screen: application designers can edit the appearance of buttons and fields in the list view, detail view, and routing detail screen of an EO.
- **Manage Look and Feel** in the "Administration" screen: administrators can change the appearance of all EO list views, edit views, and routing detail screens.

EO designer enhancements

The **Show Name on Components** option has been added to the "Application Builder" to allow application designers to locate controls more easily. You can select this option to display control names in the "Application Builder" interface.

JavaScript API enhancements

Three new Nsite JavaScript API features make the Action Builder more powerful. See the *JavaScript API manual* for more details.

- **Dynamic field visibility**: application designers can control the visibility of EO areas, controls, tables, and table components in the Detail View.
- **Setting or retrieving EO field values**: any field values set via the API are persisted when the EO instance is saved.
- **Auto-fill**: application designers can programmatically trigger EO-to-EO mappings using the JavaScript API. If they also enable automatic data population for the mapping, the target fields can be filled without any action by the user.

1 | New features overview



Enterprise object bundles



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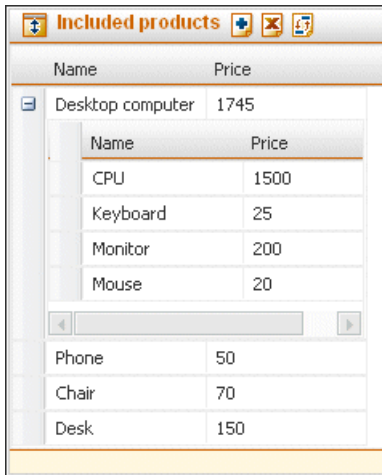
chapter



Enterprise object bundles

The EO bundle feature addresses the need to build simple hierarchical relationships between instances of a single enterprise object.

Bundles are groups of instances from the same EO. By mapping records to specially designated tables, users can nest together one or more EO instances to create a bundle.



Included products	
Name	Price
Desktop computer	1745
Phone	50
Chair	70
Desk	150

When you map a bundle instance to a table, the record appears as an expandable row. You can open the row to view the nested records. Bundle instances can also be nested within another bundle to create several nested layers of records.

A likely use for this feature is the creation of product bundles. For instance, you could add a nested EO bundle table to the “Product” EO. Users who have edit privileges for the “Product” EO can bundle products together by:

- creating instances for individual products;
- then creating an instance for the product bundle;
- and then mapping the individual products to a table in the product bundle.

The “Product” EO might be mapped to a table in the “Quote” EO. In this case, users can map entire product bundles to the “Quote” EO.

For instance, several products could be nested within the Office Workstation bundle. When the Office Workstation instance is mapped to a table in the

“Quote” EO, it appears as a single row that can be expanded to show the individual products in the bundle. There is also a Desktop Computer bundle nested within the Office Workstation, so this row can also be expanded to show the products that make up the Desktop Computer.

Note:

Web service mappings for nested tables are not supported in this release of Nsite.

Related Topics

- [Enterprise object bundle substitutions](#) on page 12

To create a nested enterprise object bundle table

Create or open an EO in the "Application Builder" before adding an EO bundle table.

1. Click **Add Table**.

2. Configure and name the table and its columns.

Ensure that at least one column corresponds to an identifying field of the EO. You can add further columns as necessary. For instance, a product bundle table might have columns for the product name and price. You could also add columns for quantity and total price, in case the bundle contains multiple copies of the same product.

Also, give the table a name that allows users to identify it as the bundle table.

3. Click **Save**.

Note:

Unsaved changes to the EO interface are not reflected in the "Enterprise Object Builder".

4. Click the table name and click **Enterprise Object Builder**.
5. Choose the same EO that you are currently editing from the **Select Enterprise Object** list.
6. Select the appropriate fields for the table from the **Target Enterprise Object** lists and the fields from the rest of the EO from the **Source Enterprise Object**. Ensure that **By reference** is selected as the type for each mapping.
7. Click **Save** to close the "Enterprise Object Builder".

8. Choose the mapped table from the **Nested table** list in the "Enterprise Object Settings" pane.
9. Click **Save**.

When editing an instance of this EO, users can create a nested EO bundle by adding other instances to the bundle table.

To add instances to a nested enterprise object bundle

You must have edit privileges for an enterprise object's bundle table to create an EO bundle.

Creating an EO bundle consists of mapping EO instances into the nested table of an instance of the same EO.

1. Open the detail view of the appropriate EO instance to add nested products.
2. Click the **Add Row** icon on the EO bundle table.
The EO instance lookup dialog box appears.
3. Select one or more instances to nest within the original instance.
4. Click **Submit**.
The records are added to the nested table.
5. Click **Save**.

The instance now contains nested instances of the same EO. When a user maps this instance to another EO table, for instance, the entry contains the original instance, which can be expanded to show the nested instances.

It is possible to have several levels of nesting by adding the original instance to the bundle table of another instance.

Note:

You cannot nest an EO instance within itself. If you attempt to create a bundle with an instance nested within the same instance, an error message appears.

Enterprise object bundle substitutions

In some circumstances, users need to replace one or more records in an EO bundle. EO bundle substitutions allow users to quickly customize EO bundles by swapping related instances.

First, an application designer has to add a substitute table that is mapped to the same EO. This table stores substitutes for each instance.

A user with edit privileges can then open an EO instance and designate substitute instances by adding them to the substitute table. Finally, whenever the original instance appears in a table, users can replace it with one of its substitutes.

For instance, the Desktop Computer product bundle might contain a 17" Monitor instance. If a 19" Monitor instance is added as a substitute product for the 17" Monitor, users could substitute in the 19" Monitor when creating a quote for a Desktop Computer.

This kind of substitution might be necessary if a customer prefers the substitute product, or if the original product is out of stock.

Related Topics

- [Enterprise object bundles](#) on page 10

To create an enterprise object bundle substitution table

Before adding a substitution table, create or open an EO in the "Application Builder", and choose a **Nested table** for this EO.

1. Click **Add Table**.

2. Configure and name the table and its columns.

Ensure that at least one column corresponds to an identifying field of the EO.

Also, give the table a name that allows users to identify it as the substitution table.

3. Click **Save**.

Note:

Unsaved changes to the EO interface are not reflected in the "Enterprise Object Builder".

4. Click the table name and click **Enterprise Object Builder**.

5. Choose the same EO that you are currently editing from the **Select Enterprise Object** list.

6. Select the appropriate fields for the table from the **Target Enterprise Object** lists and the fields from the rest of the EO from the **Source Enterprise Object**.
7. Click **Save** to close the "Enterprise Object Builder".
8. Choose the mapped table from the **Substitute table** list in the "Enterprise Object Settings" pane.
9. Click **Save**.

When editing an instance of this EO, users can designate another instance as a substitute. This instance can then be swapped into an EO bundle in place of the original instance.

To add substitute instances to an enterprise object

You must have edit privileges for an enterprise object's substitute table to designate substitute instances.

Adding substitute instances allows users to customize EO bundles by swapping substitute instances.

1. Open the detail view of the appropriate EO instance to add substitute instances.
2. Click the **Add Row** icon on the substitute table.
The EO instance lookup dialog box appears.
3. Select one or more instances to act as substitutes for the original instance.
4. Click **Submit**.
The records are added to the substitute table.
5. Click **Save**.


The instance now has substitute instances. When this instance is mapped to an EO table, they can replace it with a substitute instance.

To substitute an enterprise object instance

The EO instance that you want to substitute must have a substitute table defined and populated with one or more substitute instances.

1. Open the detail view of the EO where you want to substitute the instance.

You can substitute instances in the EO bundle table, or in any other table to which the EO is mapped.

2. Click the row that you want to substitute and click  .
The EO instance lookup dialog box appears.
3. Select the appropriate substitute instance.
4. Click **Submit**.
5. Click **Save**.

The instance that you selected is added to the table in the place of the previous instance.

Note:

An instance cannot be replaced by multiple substitutes. Users can only substitute in one record for each instance.

2 | Enterprise object bundles *Enterprise object bundle substitutions*



Enterprise Object Builder enhancements



3



chapter

To filter by Nth largest or Nth smallest values

Create an Enterprise Object Builder mapping before filtering values using the **Nth largest** or **Nth smallest** values.

These operators rank the source EO records based on the specified field, and return the highest or lowest records. They can be used in conjunction with other filter operators.

1. Open "Application Builder" screen of the target EO.
2. Click the button or link that activates the mapping and click **Enterprise Object Builder**.
3. Select **Enable filter** and click **Filter** to define the mapping filter.
4. Type a **Filter name** for a **New filter**.
5. Click **Add filter element**.
6. Choose a source EO **Field** to filter by.
7. Choose **Nth largest** or **Nth smallest** from the **Operator** list.
8. Choose **Constant** as the **Filter type**.
9. Type an integer as the "Value".

The Value determines the number of records that are returned by the filter. For instance, if you type "2" as the Value for an **Nth largest** filter, the filter returns the records with the highest and second highest values of the specified field.

10. Add other filter elements as necessary.

The **Nth largest** or **Nth smallest** filter element is always applied last, regardless of the element order.

Note:

Each filter can contain only one element with an **Nth largest** or **Nth smallest** operator. If you include two of these elements in a filter, an error message appears when you try to save the filter.

Automatic population of mapped fields

This feature automatically maps data to fields in certain circumstances. When automatic population takes effect, the mapping lookup dialog box does not appear and values are instantly added to the target fields.

When it is enabled, automatic population of mapped fields occurs for:

- lookup mode mappings for tables, and
- mappings for controls when only one record is returned.

If a mapping for a control returns multiple records, the field is not automatically populated. Instead, the user can specify the correct record from the lookup dialog box as usual.

Note:

If the mapping does not return any records, an error message appears.

To enable automatic population of mapped fields

Create an Enterprise Object Builder mapping before enabling automatic field population. If the mapping target field is a table, you must choose **Lookup Object** as the **Add Mode**.

1. Open "Application Builder" screen of the target EO.
2. Click the button, link, or table for the mapping and click **Enterprise Object Builder**.
3. Deselect **Interactive Lookup**.
4. Click **Save**.

Your changes take effect when a user runs the mapping.

If the target field is a table, every record that the mapping returns is added to the table.

If the target field is a control, a record is added if it is the only result that the mapping returns. If multiple records are returned, the user must choose the appropriate record from the lookup.

If no record is returned, an error message appears.

3 | Enterprise Object Builder enhancements *Automatic population of mapped fields*



Filtering by dynamic control values

4

chapter



4 | Filtering by dynamic control values

To filter mapping sources by dynamic control values

Filters restrict the set of EO instances that appear for a mapping lookup. Dynamic filters are a new type of filter that restrict the results based on a field value entered by the user.

The **Filter Type** list has been added to the "Define EO Filter" pane. Application designers can choose either **Constant** or **Control**.

Constant filters act like filters in the previous Nsite release. You type a "Value" and the records are filtered by that value.

Control filters allow you to define dynamic values. Rather than typing a static "Value", you select a header control from the target EO. When a user runs the mapping, records are filtered based on the value that the user entered for this field.

Note:

- The **Value** field for a **Control** filter must have the same control type as the filter **Field**. For instance, if you are filtering by a Drop Down control, the **Value** control must also be a Drop Down.
- Also, the **Value** field for a **Control** filter must be in the header area of the EO.

If users attempt to run the mapping before entering a value for the **Value** field, the dynamic filter element based on that field is ignored. The mapping still runs, and other filter elements are applied.

To filter mapping sources by dynamic control values

To set up a dynamic filter for an EO mapping, you must have pre-existing lookup mapping applied to a table, a button, or a link. You must also have a header control that corresponds to the control that you want to filter by.

1. Open "Application Builder" screen of the target EO.
2. Click the button, link, or table for the mapping.
3. Click **Enterprise Object Builder**.
4. In the "Enterprise Object Builder" dialog, select **Enable filter**, and click **Filter**.
5. Type a **Filter name** for a **New filter**.
6. Click **Add filter element**.

7. Select **Control** from the **Filter Type** list.
8. Select a **Field**. The **Operator** and **Value** options will change depending on the data type and control type of the field.
9. Select an **Operator**.
10. Select a **Value**.
 The **Value** must be a header field with the same control type as the **Field**. The value of this field determines which records are returned for the mapping.
11. Add and configure additional filter elements if necessary.
12. Click **Save filter**.

Note:

If an application developer changes the name or data type of an EO field that you have used in a filter condition, your filter becomes invalid. To avoid this problem, ensure that updates to source EOs are reflected in your filters.

13. Click **Save** to exit the "Enterprise Object Builder" dialog box.

When users open the lookup screen for this mapping, only the instances that meet the filter conditions are displayed.

Example:

For instance, if you want to allow the user to choose what product type to filter from a list of "Product" EO instances, you might create a condition such as this:

Field	Operator	Filter Type	Value
<i>product_type</i>	=	Control	<i>product_type_choice</i>

product_type_choice would be a Drop Down control in the target EO that corresponds to the *product_type* Drop Down in the "Product" EO.

A user must select a value from the *product_type_choice* Drop Down before running the mapping. The mapping returns records that have the same *product_type* as the one that the user selected from *product_type_choice*.

If the user selects **Hardware**, for example, the mapping returns only hardware products.

4 | Filtering by dynamic control values

To filter mapping sources by dynamic control values

Routing approval

5

chapter

Defining approval requirements for hierarchical routings

Application designers can customize hierarchical routing approval requirements by choosing from several different types of approval for individual positions and for the entire routing.

You can select one of the following approval types:

Approval Type	Description
Approve by All	This is the default approval type. Each participating member of the position must approve the routing.
Approve by One	This option is new to Nsite. Only one member of the position needs to approve the routing. As soon as one member approves, the other members become "Auto Approve" participants and the routing is forwarded to the next approvers.
For Review Only	Members of the position do not have to approve the routing, and it is forwarded to the next approvers. However, the routing remains in the "Review Only" users' "Received" screen until they view the details.
Auto Approve	No members of the position need to take action. The routing does not appear in the "Received" screen of these users, and it is automatically forwarded to the next approvers. This option can be used to skip positions that do not need to approve or review the routing.
Auto Reject	No users in the position need to take action. The routing is automatically rejected. This option is usually used to reject routings that contain incorrect or disallowed data.

You can define different approval requirements for positions using these settings:

- **Default Approval Type:** You can choose an approval type for the entire routing. Your choice applies to every position, except those that have individual approval types.
- **Individual Approval Type:** You can define individual approval requirements for each position. These settings apply to the positions regardless of the **Default Approval Type**.

To define the default approval requirement for a hierarchical routing

Before following these steps, create a process control and configure a hierarchical routing sequence. See the *Process control* and *Routing by reporting hierarchy* sections of the *Nsite Online Help* for details.

The **Default Approval Type** setting applies to every routing position that does not have an individually-defined approval type.

1. Open the "Configure Routing by Reporting Hierarchy" dialog box for the appropriate process control.
2. Click **Options**.
3. In the "Default Sequence Settings" pane, choose an option from the **Default Approval Type** list.
4. Click **Save**.

Related Topics

- [Nsite Online Help](#)

To define approval requirements for individual positions

Before following these steps, create a process control and add a reporting hierarchy to the sequence. See the *Process control* and *Routing by reporting hierarchy* sections of the *Nsite Online Help* for details.

If some positions have approval requirements that are different from the default approval type for the routing, you can customize the approval types for those positions.

1. Open the "Configure Routing by Reporting Hierarchy" 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 using the default approval type** by default.)

The "Define Approval Requirement" pane appears.

3. Click the arrows next to each position to expand the hierarchy, and locate the appropriate position.
4. Click the position and click **Define Rule**.
5. Click the **Approval Type** and choose an option from the list.
6. Configure approval requirements for additional positions as necessary.

Click a position and click **Define Rule** to add another individual approval requirement.

Select a rule and click **Remove** to delete the rule and revert to the default approval requirement. Click **Remove All** to delete every rule.

Your changes are reflected in the reporting hierarchy description.

7. When you have finished setting individual approval requirements, click **Save**.

Related Topics

- [Nsite Online Help](#)



Routing notifications



chapter

To resend routing notifications

If a routing email notification is not delivered successfully, routing initiators can resend the notification while the routing is still in progress.

1. Open the "Routing Details" screen of an "In Progress" routing.
2. Click **Routing Status**.
3. Click **Resend Notification**.
4. Select the users to whom you want to send notifications.
You can select any in progress participants.
5. Click **Resend**.

The routing notification is sent to the selected participants.

Disabling email notifications for delegators

Users can delegate their routings to another member of their account. However, in previous versions of Nsite, both users received routing notification emails. The original user may not need to see these notifications since a different user is dealing with the routings.

Individual users can now choose whether or not to receive routing notification emails while they are delegating their routings to another user.

Also, administrators can configure this option for other users. Thus, when delegating users cannot access their account to enable this option, an administrator can still set it.

To disable routing notifications as a normal user

1. Click **My Profile**.
2. Select **Disable Email Notifications When Delegation is in Effect**.

Note:

This option is not available unless **Enable Approval Delegation** is selected. For more information on configuring email delegation, see the *Nsite Online Help*.

You do not receive routing notification emails while delegation is in effect.

Related Topics

- [Nsite Online Help](#)

To disable routing notifications for delegators as an administrator

1. Click **Admin**.
2. Click **Manage Users**.
3. Locate the user in the "Manage Users" list and click the edit icon.
4. Select **Disable Email Notifications When Delegation is in Effect**.

Note:

This option is not available unless **Enable Approval Delegation** is selected. For more information on configuring email delegation, see the *Nsite Online Help*.

The user does not receive routing notification emails while delegation is in effect.

Related Topics

- [Nsite Online Help](#)

6 | Routing notifications *Disabling email notifications for delegators*



User interface customization
enhancements

7

chapter

To customize enterprise object system buttons and fields

Application designers can change the appearance of buttons and search fields that appear outside the EO interface. Buttons and fields in the list view, edit view, and routing detail view can be customized.

1. Open the "Application Builder" screen of the target EO.
2. Click **Customize EO Views** in the "Application Extensions" pane.
The "Customize EO Views" dialog box appears. The folder list shows the different EO screens that you can customize.
3. Expand the folders in the list to locate the correct screen, and click **Buttons**, **System Buttons**, or **System Fields** for that screen.

A list of button or field properties appears.

For regular **Buttons**, the properties include "Type", "Label", and "Show".

For **System Buttons**, the properties include "Type", "Label", "Show on Top", and "Show on Bottom".

For **System Fields**, the properties include "Type" and "Show".

4. Customize the properties as necessary.

Property	Description
"Type"	Describes the function of the button or field. You cannot change this property.
"Label"	The text that appears on the button. Click the text to type a new label if desired.
Show	The button or field is displayed only when Show is selected.
Show on Top	The button is displayed above the EO data only when Show on Top is selected.
Show on Bottom	The button is displayed below the EO data only when Show on Bottom is selected.

5. Click **Save**.

To change the style theme

Administrators can choose a new style theme to change the appearance of EO views.

Note:

- Only the EO list view, detail view, and routing view screens are affected by changing the theme.
- Selecting a new theme changes the appearance of the interface, but does not affect its functional parts.

1. Click **Admin**.
2. Click **Manage Look and Feel** in the "Global Settings" pane.
3. Choose a theme from the list.
 - The **Nsite Default** style is the regular Nsite appearance.
 - The **Integration Theme - Green** style is similar to the appearance of the Salesforce.com interface.
4. Click **Save**.

The appearance of every EO list view, detail view, and routing screen view changes to reflect your choice. All system buttons still function in the same manner — the change only impacts the appearance of the interface.

7 | User interface customization enhancements *To change the style theme*



Displaying field names



chapter

By default, field names only appear when a field is selected. As a result, controls and columns can be difficult to locate in complex enterprise objects.

The "Application Builder" screen now has an option for displaying the names of all controls and table columns in the EO interface itself. Instead of appearing as blank fields, the fields display their names when this option is enabled.

Note:

This option has no effect outside the "Application Builder" screen.

To enable field name display

1. Open the "Application Builder" screen.
2. Expand the **Application Designer Settings** pane.
3. Select **Show Name on Components**.

The names of each control and column are shown in their fields.

Note:

The following control types are not affected:

- Date Pickers
- Check Boxes
- Radio Buttons
- Buttons
- Links
- Attachments
- Images

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