



Nsite User Help

Copyright

© 2008 Business Objects, an SAP company. All rights reserved. Business Objects owns the following U.S. patents, which may cover products that are offered and licensed by Business Objects: 5,295,243; 5,339,390; 5,555,403; 5,590,250; 5,619,632; 5,632,009; 5,857,205; 5,880,742; 5,883,635; 6,085,202; 6,108,698; 6,247,008; 6,289,352; 6,300,957; 6,377,259; 6,490,593; 6,578,027; 6,581,068; 6,628,312; 6,654,761; 6,768,986; 6,772,409; 6,831,668; 6,882,998; 6,892,189; 6,901,555; 7,089,238; 7,107,266; 7,139,766; 7,178,099; 7,181,435; 7,181,440; 7,194,465; 7,222,130; 7,299,419; 7,320,122 and 7,356,779. Business Objects and its logos, BusinessObjects, Business Objects Crystal Vision, Business Process On Demand, BusinessQuery, Cartesis, Crystal Analysis, Crystal Applications, Crystal Decisions, Crystal Enterprise, Crystal Insider, Crystal Reports, Crystal Vision, Desktop Intelligence, Inxight and its logos, LinguistX, Star Tree, Table Lens, ThingFinder, Timewall, Let There Be Light, Metify, NSite, Rapid Marts, RapidMarts, the Spectrum Design, Web Intelligence, Workmail and Xcelsius are trademarks or registered trademarks in the United States and/or other countries of Business Objects and/or affiliated companies. SAP is the trademark or registered trademark of SAP AG in Germany and in several other countries. All other names mentioned herein may be trademarks of their respective owners.

Third-party Contributors

Business Objects products in this release may contain redistributions of software licensed from third-party contributors. Some of these individual components may also be available under alternative licenses. A partial listing of third-party contributors that have requested or permitted acknowledgments, as well as required notices, can be found at: <http://www.businessobjects.com/thirdparty>

2008-12-04



Contents

Chapter 1	Nsite User Help	7
	Nsite overview.....	8
	Supported browsers.....	9
	Configuring your browser.....	10
	Settings for pop-up blockers and making Nsite a trusted site	10
	In Microsoft Internet Explorer 6.0	10
	In Mozilla Firefox 1.0	10
	Check for other pop-up blockers	11
	To make Nsite a trusted web site In Microsoft Internet Explorer 6.0	11
	Displaying images.....	11
	In Microsoft Internet Explorer 6.0	11
	In Microsoft Outlook 2003.....	12
	Settings for refreshing cached pages	12
	Printing from the Nsite platform	13
	To configure your browser for printing	13
	Files attached to routing fail to open or save in Internet Explorer 6.0.....	13
	Potential solution: increase temporary internet files disk space	13
	Potential solution: do not save encrypted pages to disk	14
	To make Nsite a trusted web site in Microsoft Internet Explorer 6.0.....	14
	Security alert	14
	Navigating Nsite.....	15
	New features.....	17
	Frequently asked questions.....	19
	Accessing help.....	20
	To launch Nsite's platform help.....	20
	Printing help.....	21

Contents

To print a topic.....	21
Getting started with Nsite.....	21
Integrating with Salesforce.....	22
Nsite Enterprise Applications.....	22
What is an application?.....	22
Selecting applications.....	24
Nsite Enterprise Objects.....	24
The Nsite Platform.....	31
The Nsite navigation bar.....	31
The Support navigation bar.....	32
Modifying Frequently Used lists.....	33
To add a process application or report.....	33
To remove a process application or report	33
The Nsite dashboard.....	33
Personalizing your dashboard.....	34
Routing & Workflows.....	35
User Preferences & Login Information.....	57
Managing your profile.....	57
Changing your password.....	57
To change passwords.....	58
Log-in credentials.....	58
Log-in rules.....	58
If you forget your password.....	59
To obtain a new password.....	59
Editing your user information.....	59
To edit user information.....	59
Managing e-mail notifications.....	60
To manage e-mail notifications.....	60
Delegating approvals.....	61
To delegate your routings.....	61
Managing time zones.....	62

Contents

To adjust your personal time zone.....	63
Overriding the UTC offset.....	64
Reports.....	65
Generating reports.....	65
Running reports.....	66
Routing statistics	66
Exporting data from reports.....	67
To export data.....	67
Using Report Builder.....	68
How to build a report.....	68
Application Center.....	69
Nsite application center.....	69
Using the Quote and Proposal Application.....	69
Using the Channel Management Application.....	73

Index

79

Contents



Nsite User Help

1



chapter

Nsite overview

Why Nsite?

Unlike traditional packaged software, Nsite is software-as-a-service, allowing you to sign up, log in, and immediately access enterprise data, workflow routings, and business processes. Nsite's easy to use platform allows for painless capturing and tracking of important business information.

Nsite's customizable enterprise application can be easily adapted to meet the specialized needs of your business. Chances are, if you're just sitting down to Nsite for the first time, your organization's developers have created applications and workflows that are just waiting to be leveraged.

The Nsite platform has evolved from a process routing engine where each application interface was a routable form to a complete enterprise application which includes a set of interfaces grouped together. The intelligent joining of these [enterprise objects](#) on page 24 creates very powerful data gathering and analysis tools, that allow businesses to track various forms of data, such as accounts, leads, opportunities, quotes, products, and reports.

Note:

For users prior to 6.0, you will still have access to your applications. The single routable form applications are now called process applications, both in the interface and throughout the help. To access process applications, select **Process Applications** from the **Application** menu at the top of the Nsite page. This special application looks and works like the pre 6.0 Nsite platform. New process applications may be initiated from the **Process Apps** tab.

Some of the enterprise object may be routable enterprise objects which, like the earlier single form process applications, not only capture data from the users but can transmit the data to others for review. So there still may be instances where information may need to be routed, whether internally to the company as would most commonly be the case with a request for office supplies, but routing may also be done externally, such as you would with a complex quote that you send to a client.

Enterprise objects may also be transactional interfaces which gather data, but the data does not need to be routed. Transactions can be used for entering vendor data into the office supplies request (usually the Accounting department is the only ones to be able to add, edit, or delete entries for this kind of data). Transactions may also be used in the quote application to

update information about the account, the contact, or the activities, such as calls made by the salesperson.

Why not just use a spreadsheet?

Unlike spreadsheets, Nsite maintains all data in a database, and unlike other applications, Nsite automatically captures actual process flows. You can [generate an on-demand report](#) on page 68, which help you and your team to see your deals, identify and fix bottlenecks, and improve the way your business runs.

Nsite allows you to extend your reach into different channels and partner companies by sharing your standard and customized applications over a secure connection.

In the channel management component, you can create and configure quotes, apply pricing and discounts, [generate proposals](#) on page 30, and [route](#) on page 35 quotes through your company's established approval workflow.

How do I use these tools to manage my business processes?

Nsite applications are a mixture of different interface screens. [Enterprise Objects](#) on page 24 (EOs) are self-contained entities consisting of business data and associated processing. Each EO has views for creating, editing, retrieving, and deleting data. Some are also [workflow-enabled](#) on page 35 which are used for capturing data, then routing the data to reviewers.

All actions in a routing are tracked by the system. Actions include the moment the routing is sent, when each recipient receives the routing, and which actions the recipient takes. Tracking routings provides not only a history of routing actions, but also accountability of participants in the routing.

Helpful links

- [Getting Started with Nsite](#) on page 21
- [New Features](#) on page 17
- [Frequently Asked Questions](#) on page 19

To review the most common tasks that you can perform with Nsite, see the user [tutorial](#) on page 53.

Supported browsers

The Nsite platform currently supports the following browsers:

Windows 98, 2000, and XP	Internet Explorer 6.x and above
--------------------------	---------------------------------

Note:

All process applications created with Process Application Builder work only with Internet Explorer 6.x and later on Windows 98, 2000, and XP. You cannot create applications with earlier versions of Internet Explorer or other browsers.

Configuring your browser

Browsers or security programs may be configured to block all pop-up HTML pages and dialog boxes, such as confirmation messages.

Settings for pop-up blockers and making Nsite a trusted site

To make sure you can view all Nsite messages, change your browser's or security program's settings to designate Nsite as a trusted site.

If you click a link or button and nothing happens, check pop-up blocker settings and allow pop-ups from Nsite:

In Microsoft Internet Explorer 6.0

1. Select **Tools** on the menu bar
2. Select **Pop-up Blocker**
3. Select **Pop-up Blocker Setting**
4. In the **Address of Web site to allow** field type `https://process.nsite.com` and click the **Add** button
5. Then type `https://process2.nsite.com` and click the **Add** button
6. Click the **Close** button
7. Try again!

In Mozilla Firefox 1.0

1. Select **Tools** on the menu bar

2. Select **Options**
3. Select **Web Features** from the icons on the left
4. If **Block Popup Windows** is checked, click the **Allowed Sites** button
5. Enter `https://process.nsite.com` and click **Allow**
6. Enter `https://process2.nsite.com` and click **Allow**
7. Click **OK** then **OK**

Check for other pop-up blockers

- Yahoo! toolbar
- Google toolbar
- AOL Instant Messenger

To make Nsite a trusted web site In Microsoft Internet Explorer 6.0

1. Select **Tools** on the menu bar
2. Select **Internet Options**
3. Select the **Security** tab
4. Select **Trusted Sites** (green circle with check mark)
5. Click the **Sites** button
6. Enter `https://process.nsite.com` and click **Add**
7. Enter `https://process2.nsite.com` and click **Add**
8. Click **OK** then **OK**
9. Try again!

Displaying images

If images do not display in Nsite notification emails (in other words, you see a red "X" instead of an image), add Nsite as a trusted web site in your security settings:

In Microsoft Internet Explorer 6.0

1. Select **Tools** on the menu bar

2. Select **Internet Options**
3. Select the **Security** tab
4. Select **Trusted Sites** (green circle with check mark)
5. Click the **Sites** button
6. Enter `https://process.nsite.com` and click **Add**
7. Enter `https://process2.nsite.com` and click **Add**
8. Click **OK** then **OK**

If still doesn't work, change email settings to display html images.

In Microsoft Outlook 2003

1. Select **Tools** on the menu bar
2. Select **Options**
3. Select the **Security** tab
4. In the **Download Pictures** section, click the **Change Automatic Download Settings** button
5. Remove the check mark from the box that says **Don't download pictures or other content automatically in HTML e-mail**
6. Or, remove check mark from the box that says **Permit downloads from Web sites in this security zone: Trusted zone**

Settings for refreshing cached pages

Since the Nsite platform operates as an application in your browser, set your browser to refresh cached pages when the page has changed:

1. From the Internet Explorer **Tools** menu, select **Internet Options**.
2. Click the **General** tab.
3. Under the **Temporary Internet files** section click the **Settings** button.
4. For the **Check for newer version of stored pages** option select **Every visit to the page**.
5. Click the **OK** button. Then click **OK** again in the Internet Options window.

Printing from the Nsite platform

To make sure borders and background colors display when you print from the **In Progress**, **Completed**, or **Archive** screens, follow these steps:

To configure your browser for printing

1. From the Internet Explorer **Tools** menu, select **Internet Options**.
2. Click the **Advanced** tab.
3. Scroll down and make sure that the **Print background colors and images** check box is selected.
4. Click **OK** and then click the **Print Friendly with Status** button again.

Files attached to routing fail to open or save in Internet Explorer 6.0

Typical error messages:

- Internet Explorer cannot download msword from process2.nsite.com
- Internet explorer was not able to open this internet site.
- The requested site is either unavailable or cannot be found.

Potential solution: increase temporary internet files disk space

1. On the Internet Explorer menu select **Tools**
2. Select **Internet Options**
3. On the **General** settings tab
4. In the **Temporary Internet files** section
5. Select the **Settings** button
6. Under **Temporary Internet files folder**
7. Increase **Amount of disk space to use:** to at least 100 MB

Potential solution: do not save encrypted pages to disk

1. On the Internet Explorer menu select **Tools**
2. Select **Internet Options**
3. On the **Advanced** tab, scroll down to the **Security** section
4. Uncheck the box that says **Do not save encrypted pages to disk**

To make Nsite a trusted web site in Microsoft Internet Explorer 6.0

1. Select **Tools** on the menu bar
2. Select **Internet Options**
3. Select the **Security** tab
4. Select **Trusted Sites** (green circle with check mark)
5. Click the **Sites** button
6. Enter https://process.nsite.com and click **Add**
7. Enter https://process2.nsite.com and click **Add**
8. Click **OK** then **OK**

Security alert

When you first sign on to Nsite's Beta version, you will see a Security Alert.

Nsite generates its own security certificate which you can add to your browser. Click **View Certificate** to make sure you want to accept the Nsite certificate. Otherwise, click **Yes** to proceed. In the general release of Nsite, the certificate authority will be Verisign.

Note:

If the browser is not configured properly, clicking the **Approve** or **Reject** button may not work.

Navigating Nsite

One of the great things about Nsite is how easy it is to navigate. You navigate it the way you would any other Web page: by pointing and clicking over text links, tabs, and buttons.

Every time you log into Nsite, you begin at your home page. The first page you see is the home page of the last *application* on page 22 you accessed. The look and feel of the elements on your home page is similar to other users' home pages, but the tasks and events that appear in the body of the page are specific to you.

Combining the pre 6.0 Process Applications with 6.0 Enterprise Applications

In 6.0, the single routable form applications from pre 6.0 accounts are called Process Applications. The pre 6.0 Nsite platform becomes another application you can *select* on page 24 from the **Applications** menu at the top right corner of any Nsite screen. The Home screen for this special Process Application application is the pre 6.0 My Nsite screen. For more information about the Process Application change, see "What are Process Applications".

Nsite Process Application home screen

In the process application home page, the **At a Glance** and **Frequently Used** areas are shortcuts to status tabs on the application. Items listed in the **At a Glance** area display on the In Progress or Drafts tab. Items listed in the Frequently Used area display on the Process Applications or Drafts tab.

The At A Glance area

The At A Glance area displays an overview of active routings and past due routings. Each routing is assigned a system-generated number.

Next to Received, Draft, Sent, and Notes , there is a number. The number lets you know how many active routings you have sent or received, the number of drafts you have created, or the number of unread notes that have been posted to routings in which you are a participant.

- Click the **Received** or the **Sent** link to launch the **In Progress** screen.
- Click the **Draft** link to launch the **Drafts** screen.
- Click the **Notes** link to launch a screen where you select the screen with the note. The Notes icon guides you to your Nsite **In Progress**, **Completed**, or **Archive** screen, which has the unread note.

The Frequently Used area

Frequently used process applications and reports are just one click away. To launch the process application or report directly from the Home screen, click the process application. You may customize your frequently used list to display process applications or reports.

- Click the **Add** button to add new process applications or reports to the frequently used list.
- Click the **Edit** button to modify existing process applications or reports on the frequently used list.

6.0 Navigation

If your administrator has given you access to the new 6.0 applications in addition to your process applications, you can access them from your [Applications menu](#) on page 24. Once you select a 6.0 Nsite application, the navigation and features on your home page shift to the new paradigm:

- [Applications](#) on page 24: You can select the application you want to work with in the Application field at the top right corner of any screen.
- [Enterprise Objects](#) on page 24: These are represented by the tabs across your screen.
- [Dashboard](#) on page 33: A visual representation of reports and other metrics that can provide key performance indicators on the health of your business.

Nsite Home Screen

Other components of the Nsite home page include:

History Bar

You can use the History Bar to view and return to the last applications and enterprise objects you accessed.

Shortcuts

The Shortcuts module is a mirror of the tabs that display on your application. You can use these shortcuts to quickly create a new record for any of the enterprise objects associated with the application.

Messages

Messages are a simplified view of your received, sent, and draft messages, including any attached notes.

Starting Points

Starting Points links you to:

- [Frequently Asked Questions](#) on page 19
- [Getting Started with Nsite](#) on page 21
- New features added in this release

New features

Here's a list of enhancements and developments new to version 6.0 of the Nsite platform:

- **Process Applications:** For users with 5.0 and earlier versions of Nsite, SmartForms and what were then called Applications are now called Process Applications. Process Applications are provided so these customers and others who wish to only have Nsite routings may still use and modify existing (process) applications, and even create new process applications.

The 6.0 version of Nsite is quite a large paradigm shift from 5.0. The new applications are not only for routings, though they do have workflow objects which create routings. The 6.0 version of applications contain both standard enterprise objects and workflow enterprise objects. These objects and fields from these objects may be interrelated. Though process applications and the new 6.0 applications coexist, they do not merge. Features from 6.0 do not carry over to the 5.0 style platform. The older style My Nsite dashboard and tabs exist as a separate application within the new 6.0 platform.

To get reports from process applications, you have to select **Process Applications** from the **Application** menu. None of the new 6.0 workflow objects will be displayed in the status views, only the status of process application routings. Likewise, no process application routings will be displayed in the status view of workflow objects.

- **Applications:** An [application](#) on page 22 refers to a series of tabs across an Nsite screen. By clicking on a tab, you go to a tab-specific home page. Each tab represents an enterprise object, and these enterprise objects work as a unit to provide application functionality. You can [select applications via a drop-down menu](#) on page 24 that's always visible on

the Nsite platform. Applications may also be shared with your corporate partners.

- **Nsite-provided applications:** Although Nsite provides your organization with the power to build its own robust applications with routable workflows, we also get you started with built-in Quote/Proposal and Channel Management applications you can use right away.

If you are a 5.0 user, Nsite applications are not included in your system automatically-- they must be requested from your administrator.

- **Enterprise Objects:** An [Enterprise Object](#) on page 24 is a self-contained entity consisting of business data and associated processing. Examples of Enterprise Objects include accounts, contacts, leads, opportunities, quotes, products, and campaigns. Standard enterprise objects include data that is not routed in the manner of process applications. Workflow enterprise objects can be routed with all the controls and flexibility Nsite is known for. Don't have time to add details to many records? Just use our [Quick Create](#) on page 29 function to rapidly enter required information.
- **Summary and detail views of enterprise objects:** You can alternately choose to view [crucial, basic data elements](#) on page 29 of an object record, or add [additional information and activities](#) on page 30 into a more detailed view of the record.
- **Export Records:** You can [export records](#) on page 30 into Excel or CSV format from any enterprise object at the push of a button.
- **Dashboard View:** Track your company's performance metrics in the form of [charts, graphs, and tables](#) on page 33 pertaining to the application you are viewing. You can [customize this view](#) on page 34 by selecting the number of rows, columns, and individual components.
- **Proposals:** Easily [generate proposals](#) on page 30 from your data with the push of a button.
- **Report Builder:** Nsite's [report builder](#) on page 68 will guide you through the steps for creating a custom report that will answer your data questions in minutes.
- **Role based access control:** Nsite users get access to their organization's data based on their role in the organization. Different views of enterprise objects can exist for sales, marketing, operations, human resources, IT, finance, manufacturing, product development, and support. You can create your own roles. Different roles can include standard user (you can view your own data in any application), marketing department user, channel manager, sales VP, sales representative, and CEO. Role Based Access Control is controlled by your administrator.

Frequently asked questions

Getting started quickly

- [What types of applications can I build with Nsite?](#) on page 22
- [How long does it take to build an application?](#) on page 22
- [How do I get started?](#) on page 21
- [What's the fastest way to enter a new Enterprise Object record?](#) on page 29
- [How do I customize my dashboard?](#) on page 34
- [Sharing process applications with partner companies](#) on page 41

Signing on to your account

- [Why do I get a security alert when I log on?](#) on page 10
- [How do I change my password?](#) on page 57
- [What do I do if I have forgotten my password?](#) on page 59
- [What do I do if I have forgotten my user ID or my company ID?](#) on page 58
- [When I log in, why do I get a message that I am already logged on? What do I do when it asks if I want to end the other session? What happens when I end the other session?](#) on page 58

Routings and Workflow-enabled Enterprise Objects

- [Why doesn't anything happen when I click the Approve or Reject button on an application?](#) on page 10
- [Why can't I remove a user from the routing list?](#) on page 49
- [Why can't I delete a routing?](#) on page 49
- [Can you delegate routings to another manager?](#) on page 61
- [Do all users see the notes that are posted on a routing?](#) on page 40
- [Does Nsite automatically inform a user and approver if their process is past due?](#) on page 48

Other questions

- [Why are borders and background colors not visible when I print?](#) on page 10
- [Sometime when information has changed, I don't see the change. Why?](#) on page 10

Accessing help

Since Nsite is a platform providing customized applications, there is the help which Nsite provides for the platform (called Nsite help) and there is the help which customers should create as they create applications.

To launch Nsite's platform help

Click the Help icon at the top of any screen.

To report any errors or suggestions for improvement of the Nsite platform help, contact ondemandsupport_nsite@sap.com.

Customized application and Enterprise Object help

When customized applications are developed, your developers should add overview information for the application describing the flow of the application for each type of user.

Application overview help

Application overview help is normally added as a Web file to a tab. Help may be in the form of any application supported by the browser. Examples of application specific help have included streaming audio and video, slide shows, PDF files, or html pages.

Enterprise Object help

Enterprise object specific help can be accessed using the **Procedures** button in when in the data entering (edit) interface of any enterprise object. Each company is responsible for customizing the help files associated with their enterprise object.

To report any errors or suggestions for improvement of the application or enterprise object specific help, contact your Nsite Administrator.

Note:

If you cannot see the navigation tabs (Contents, Index, Glossary, and Search) in the help systems, click the **Show** button in the Content pane on the right.

Printing help

You can print out any help topic for use as a handy desktop reference. Using the Contents navigation tab, you don't even need to open a topic to print it.

Note:

If you cannot see the navigation tabs (Contents, Index, Glossary, and Search) in the help systems, click the **Show** button in the Content pane on the right.

To print a topic

1. In the Table of Contents, right click on the topic you want to print.
2. Select **Print Target** on the pop-up menu.
3. Click **Print** in the Print Dialog box.

To print a series of topics, you must open each one individually from the Table of Contents and repeat the steps listed above.

Getting started with Nsite

Here are some of the tasks you can accomplish using Nsite:

Working with your applications

- [Select an application](#) on page 24
- [Create an Enterprise Object record](#) on page 29

Working with process applications

- [Initiating a process](#) on page 54
- [Add a recipient after the process has been started](#) on page 52
- [Send a message to a specific participant of the process](#) on page 42
- [Including unregistered users in a routing](#) on page 43
- [Check the status of a process](#) on page 36
- [Modifying Frequently Used lists](#) on page 33

Working with the Quote and Proposal application

- [Use the Quote and Proposal Application](#) on page 69
- [Integrate the Quote and Proposal application with Salesforce](#) on page 70

- [Generate proposals](#) on page 30

Working with the Channel Management application

- [Use the Channel Management Application](#) on page 73

Dashboard and analytics

- [Personalize your dashboard](#) on page 34
- [Running reports](#) on page 66
- [Exporting data from reports](#) on page 67

Other tasks

- [Manage personal preferences](#) on page 57

Integrating with Salesforce

Nsite integrates with Salesforce through Salesforce AppExchange program.

Note:

Salesforce integration with Nsite requires the Salesforce edition which provides the Salesforce Web services API. The Salesforce full enterprise edition already has the Web services API. Check with Salesforce about upgrading your Salesforce account to include the Web services API.

To configure Salesforce you must be an Nsite Administrator.

Nsite provides a document for configuring your Salesforce and Nsite accounts:

Related Topics

- [Five steps to set up Nsite Quote and Proposal Management with Salesforce.com](#)

Nsite Enterprise Applications

What is an application?

[Looking for Process Applications?](#) on page 17

An application is a series of tabs across an Nsite screen. Tabs will show different interfaces. There are special tabs, such as the Home tab, which is the user's home page for that application. When you login to Nsite, you will see the home page of the last application you were using. Each application always has a home tab since it provides access to all your routings. The Application Metrics tab is a special tab which allows you to run reports on routing. In your customized application it is your application developers which decide whether to include the Application Metrics tab in the application. Any type of browser supported web page may also be a tab, but most commonly tabs will be associated with Nsite enterprise objects.

- **Home tab** -- The home page tab is displayed regardless of the application. The user's home page is customized by the user. The home page provides views into information important to the user. This important information can be graphics, charts, the status of routings, or sorting of standard enterprise objects. While each user can select their own views, the Nsite application developer and administrators need to define the data from which users can select.
- **Application Metrics tab** -- Many Applications will have an Application Metrics tab for monitoring and analyzing routings
- **Web pages tab** -- Application Developers (usually within your own organization) can add any type of web page which the browser will support.
- **Enterprise Object tabs** -- Most tabs will access [Enterprise Objects](#) on page 24, while some access external URLs. By clicking on an enterprise object tab, you go to the main access page for that enterprise object.

You can [switch between applications](#) on page 24 easily from any Nsite screen. To navigate between screens, you use the application menu and the application tabs.

Examples of applications you can make include:

- Invoice approvals
- Payment requests
- Expense reports
- Requests for time off
- Document approval
- New hire forms
- Capital authorization requests
- Marketing operations plans
- Purchase requests

- Travel authorizations
- Requests for quote
- Deposit vouchers
- Quote approvals for salesforce.com or Siebel OnDemand

Applications are easy to create and usually only take hours or days, depending on the number of enterprise objects and the complexity of your business relationships. Usually individuals within your own company create and maintain your own applications. These individuals are given Nsite application management privileges by your Nsite Administrator.

Selecting applications

Applications may be selected from any screen.

To select an application:

1. Select an application from the pull-down menu in the **Select Application** field.

The Select Application field is located at the top right-hand corner of your screen, next to the Setup, Help, Logout and About fields.

2. The system will take you to the application you selected.

Note that the tab names will change depending on the application you selected.

From there, you can access the [Enterprise Object](#) on page 24 appropriate to your task.

Nsite Enterprise Objects

What is an Enterprise Object?

Nsite's enterprise objects are the main building block of Nsite Enterprise Applications.

Enterprise Objects are groups of records or “instances” with the same fields because they are created from the same interface. Examples of Enterprise Objects include Contacts, Leads, Opportunities, Quotes, Products,

Campaigns, and Reports. In applications these enterprise objects work as a unit to provide application functionality. Enterprise objects may be standard objects which you create, edit, view, or delete, or they can be workflow-enabled enterprise objects.

The Nsite system is designed around Enterprise Objects (or EOs) because EOs reflect the way people think of their data.

Main access page for the Enterprise Object

Each enterprise object has an access screen which is made up of several areas for creating, accessing, and editing enterprise object records:

Search and List pane	The Search and List panes work together to locate existing records which belong to the enterprise object. Entering information in the Search pane displays which records in the list pane contain the information. You can then access and edit objects in the list pane.
New button	The New button launches the edit interface for the enterprise object. The edit interface is the data gathering interface for the enterprise object.
Quick Create pane	The Quick Create pane allows you to quickly create several records by only requiring the minimum amount of information to create a record.
Shortcuts pane	The Shortcuts pane allows you to quickly create records for other enterprise objects in the application. Clicking the shortcut takes you to the edit view of the selected enterprise object.

Enterprise Object edit and detail interfaces

Enterprise objects have a data gathering interface called the edit page. The edit interface, depending on the design of the enterprise object, provides processing, such as validation and data lookups. Data lookups may be simple one value lookups, or complex mappings between fields in the editing view of the EO and other EOs or web services.

Detail interfaces are similar in appearance to the edit interface however they display data in read only fields for routing (though some fields may be editable in routings depending on the design of the EO).

Workflow Enabled and Standard Enterprise Objects

There are two types of Enterprise Objects:

- **Workflow Enabled** - these EOs are enabled for routing, such as quotes. Workflow stages for an EO include In Progress, Completed, Draft, and Archive. Workflow enabled enterprise objects create records that can be routed to others for approval. Nsite tracks data in the request, as well as all the actions taken by reviewers.
- **Standard** - these EOs, such as contacts and accounts, are not routed, and simply store data

Examples of Enterprise Objects include:

- Accounts
- Contacts
- Leads
- Opportunities
- Quotes
- Products
- Campaigns

Your company's Nsite application developers can build custom enterprise objects, or can deploy enterprise objects provided by Nsite. The enterprise object is a set of fields, properties, and relationships Application Developers create. Application Developers create the form of the object. When you access an Enterprise Object and click **New**, you create a new record with new information. These new records can be edited, retrieved, or deleted by users.

Whether you view EOs in your application is determined by roles or groups assigned you by your Nsite Administrator.

Each Enterprise Object is represented by a tab, and a group of tabs make up an application. Tabs may also display web pages.

Each instance of an EO is called a **record**, which is simply a collection of fields related to a specific item.

As you use different Enterprise Objects, they appear on the Enterprise Object History Bar at the top of your screen with a "**Last Viewed**" label.

Navigating tabs

If you have more enterprise objects than can fit across the tab bar, you can use the arrow button to access a **Select Tab** screen. The arrow tab appears regardless of the number of tabs in your application.

To view and navigate to all Enterprise Objects:

1. Click the double-arrow tab
2. In the **Select Tab** screen select the appropriate tab

Using the Enterprise Object main page

The enterprise object main access page displays [Quick Create](#) on page 29, [Search, and List](#) on page 27 views for an enterprise object. The main page is made up of four sections. One section, the Quick Create pane, provides the minimum fields for creating a new record for the object. The [Search and List](#) on page 27 panes are used together to find records.

Related Topics

- [Using the Quick Create function](#) on page 29
- [Viewing and editing Enterprise Object details](#) on page 30
- [Viewing and editing the Enterprise Object summary interface](#) on page 29
- [What is an Enterprise Object?](#) on page 24

Finding records

Using the search and filter mechanism in the main access page for enterprise objects, there are a number of ways to locate records.

When an application is created, the application developer can select which fields to display in both the **Search** pane and the **List** panes of the main enterprise object access page.

The **Search** and **List** panes work together to locate the records the user is looking for. You enter data in the search pane to bring up a number of records

which contain that data. These records are displayed in the list. The user then can select the record from the list to access the record.

Filtering dropdowns and text boxes

Searching for records is done by limiting the number of records in the List pane or by sorting the records in the list pane. If you have Joe Davis and Joe Davison in a text field and type in Joe D or even Joe Davis, you will see records for Joe Davis and Joe Davison.

Text boxes will show the records which contain the data entered in the filter. Drop downs will match records which have the same selection in the drop down. For example Joe Davis and Joe Davison will be separate items for the search. If you select Joe Davis in the dropdown, Joe Davison will not be displayed

Sorting

Sorting is another main way of accessing records. Each column in the list pane is sortable. Clicking the column heading will sort the records on that column. Once the column heading is clicked a triangle appears to show whether the sorting is ascending or descending.

Using dates to search for records

Date filters show the records that are BEFORE the date in the filter.

Note:

Unlike the other filter Date filters require you to click the Search button before the filter is applied against the records in the List pane.

Using multiple filters

When multiple filters are used the resulting list will be the combination. For example see the filtering by Account Owner example above. When Annual Revenue is set to \$30,000,000, then only the records which Amy Manager is the Account Owner AND the Annual Revenue is equal to or above \$30,000,000 are displayed.

Fields in the search pane

Your application developers can select fields to be displayed in the search pane. Created By, Create Date, Last Updated By, and Last Updated Date are always part of the search pane.

Using the Quick Create function

On the home page of any Enterprise Object, the **Quick Create** module allows you to speed up the process of creating a record for the EO.

The **Quick Create** module always appears with one or two required fields, as indicated by a red asterisk.

To use the Quick Create module:

1. Enter the required information.
2. Click **Create**.

Result: The home pages refreshes, adding your new instance to the **List** module.

From the List view, you can click an icon to view a [Summary](#) on page 29 page, where you can add additional information, attach files, and generate proposals.

Viewing and editing the Enterprise Object summary interface

When you click the **Edit** button next to a record in the List view, the Summary interface appears. The summary information is the top level (sometimes called header level) information for the record. To access table (detail) information you access the detail view.

The Edit interface is the data entry interface of the object. Depending on the design of the enterprise object validation, computations, simple one field lookups, lookups of records from other enterprise objects, or generating PDF documents to include data from the record.

In the case of workflow-enabled enterprise objects, you can attach files and [route](#) on page 35 records from this screen.

Viewing and editing Enterprise Object details

When you click the **Edit** icon for a record, Nsite displays a detail view of the record. This view includes the summary, plus any activities, products, audit information, and attachments in detail tables.

Adding additional information

Click the icon in any of the modules in the Details page to add a new activity or product.

Exporting Enterprise Object records

If you would like to review enterprise object records in an external file format, such as a Microsoft Excel spreadsheet or a CSV (comma separated value) text file, you can click the **Export** button in any record listing table in an Enterprise Object.

Note:

If you do not have an export button it is because your security permission in the roles based access control (RBAC) module are not set for you to have export privileges for the record(s) in the list. Your Nsite Administrator manages the RBAC settings.

When you click **Export**, Nsite generates an Excel document and allows you to save it on your hard drive.

Generating proposals

You can use Nsite to generate proposals in multiple formats from your data.

To generate a proposal:

1. Ensure that your administrator has uploaded a template in RTF format.
2. *Select an application* on page 24 from the drop-down menu at the top-right of any screen.
3. Select an *enterprise object* on page 24.
4. Select an enterprise object record from the List view, or use the Search module to find the record you want to include in the proposal.

5. Select the record by clicking on its description in the List view, or the Edit button.
6. In the [Summary](#) on page 29 module of the record, click the **Generate Proposal** button.
The Select Proposal Template window will pop up.
7. Choose the template you want to use for the proposal in the **Proposal Template** field.
8. Select the **Output** type.
You can choose:
 - RTF
 - Microsoft Word document
 - Adobe Acrobat PDF
 - Plain text
9. Click **Submit**.
10. In the File Download dialog box, select whether you want to open or save your proposal.
Depending on your selection in the File Download dialog, the proposal will open in your selected file format, or will be saved to the location of your choice.

The Nsite Platform

The Nsite navigation bar

Click the Home tab to display your customizable Home screen.

Click other tabs to go to other screens of the Nsite dashboard. When you are working in a particular tab, that tab turns white. In the following example, you are working in the Home tab.

Nsite dashboard

Click the **In Progress** tab to display the active routings in which you are a participant, whether initiator or recipient.

Click the **Completed** tab to display completed routings in which you are a participant, whether initiator or recipient. A routing is considered completed when it has been approved by all approvers, has been stopped by the initiator, or has been stopped or rejected by any approver.

Click the Applications tab to display the Nsite applications that are available to each user.

Click the Drafts tab to display processes that you have started by entering information, but have not yet routed.

Click the **Archive** tab to display completed routings that have been moved to the archive folder.

Click the Application Metrics tab to display a list of available reports you can run to view statistics about routings or export data to multiple applications.

The Support navigation bar

The support navigation bar displays in the upper-right corner.

Support navigation bar

The support navigation bar provides the following access points:

Click this button	To perform this task
My Profile	Manage your contact information on page 57, and your time on page 62 and email notification preferences on page 60
Help	Find information you need on page 20 to complete a task or context-sensitive help associated with each process application
Logout	Exit the platform

Modifying Frequently Used lists

The Frequently Used list, which includes process applications and reports, is available from the Home screen.

To add a process application or report

1. Select the process application or report to display in your frequently used list.
Selected process applications and reports display a check in the box.
2. Click the **Edit** button to update the frequently used list of process applications and reports for your Home screen.

To remove a process application or report

1. Clear the process application or report to display in your frequently used list.
Cleared process applications and reports display no check in the box.
2. Click the **Edit** button to revise the frequently used list of process applications and reports for your Home screen.

The Nsite dashboard

Whenever you select an application, the first page you'll see is its home page. On the home page users have the option to add dashboards.

Dashboards are visual representations that display important information from reports and other metrics that can provide key performance indicators on the health of your business.

Components of the dashboard

Each dashboard chart or table is called a component. Application Developers and Administrators build dashboards using the following kinds of components:

- Horizontal or vertical bar charts

- Stacked bar charts
- Pie Charts
- Line Group Charts
- Tables
- Metrics

Users are able to add or change components to their application home page by selecting the dashboard components on page 34.

Examples of Dashboard Components

- Top Accounts: top 10 accounts by revenue and by rep (user) List
- Quote Status Display: quotes by status (open, etc.) Bar diagram
- Open Activities: open activities/task by rep (user) List
- Quotes by Channel: quote \$ by channel Pie chart
- Top Selling Products: Top products based on revenues and average % Bar diagram
- Order Status Display: orders by status Pie chart
- Discount and Margins Display: average % per product starting with highest List

Personalizing your dashboard

The first time you [select an application](#) on page 24, an empty dashboard will appear with a "Dashboard Personalization" link of the application's main page. Follow these steps to build your first personalized dashboard:

1. Click the **Dashboard Personalization** link to begin building your dashboard.
You will be taken to the Dashboard Layout screen.
2. Select a layout in the **Dashboard Layout** field.
You can choose a one-, two-, or three-column format.
3. Select the reported data you would like to see appear in each row of the dashboard.
4. Click **Save**. Nsite will then take you to your newly created dashboard.

Note:

You can also add a row, delete a row, or cancel this procedure in the Dashboard Layout screen. At any time, you can also click **Dashboard Personalization** from the home page to modify your layout.

Routing & Workflows

Routings defined

Initiators send the workflow-enabled enterprise object to recipients of the routing. Recipients are either approvers or CC recipients. Approvers must accept or reject the routing. CC recipients can only view the routing.

Recipients can also *forward* on page 52 or *delegate* on page 61 routings.

Recipients are sent routings according to the order shown in the **Select Order** list in the **Select/Sort Participants** screen. Recipients can be part of a parallel or a sequential routing.

To route to all recipients in sequential order

- Select the **Select Order** check box for each recipient.
The **Select Order** column is incremented in ascending order. Note that the total time allocated is the addition of all allocated times for each recipient.

To route to all recipients in parallel order

- Clear the **Select Order** check boxes for all recipients.
The Select Order numbers are the same. Note that the allocated time and total allocated time are the same for each recipient.
Parallel groups are identified by having the same Select Order number.

What happens when a routing is rejected?

Anytime an approver rejects a process, whether in a sequential or parallel routing, that routing status becomes **Completed** and the routing ends at the rejection.

When a process is rejected, the initiator can copy and start a new process. The new process has its own routing ID and is considered a new routing for

reporting purposes. Unless the initiator writes a process description that matches that of the rejected process, there is no way to tie the rejected process to the approved process.

Note:

Nsite does not support mixed approvals (one of three approvers gives the approval; the others do not act or one rejects in a parallel routing. The routing is rejected at the moment one approver rejects, so the other parallel recipient would not be able to act upon the routing. In a serial routing the routing would not move to the next recipient after the rejection).

Checking the status of routings

Normal users can check the status of routings that they participate in. Routing participants include the initiator and the recipients.

There are several ways to check the status of routings. You can generate a report, check the status screens, run a search, or open the enterprise object list view.

Checking status using reports

You can group the status of routings by date or by participant when generating a report. Users with **Organization** or **Company Wide** Report Generation Security can create reports that include routings for their entire organization or company.

Check status using status screens

Routings have a status of **In Progress** or **Completed**. Stopped routings are considered to be complete. Initiators are the only participants who can stop a routing. Initiators can restart a stopped routing by clicking the **Copy & Start New Routing**.

You can check enterprise objects by clicking the Sent or Received links on the left side of any application's home page. This link will take you to the **In Progress** screen. Click the **Completed** link for routings which are completed. When a routing is rejected, stopped or completely approved, the routing is considered to be complete, so if you are checking a routing, but it has disappeared from your **In Progress** screen, check the **Completed** screen. Older completed routings may also be found in the **Archive** screen.

The Sent and Received links on the home page will display all routings from all enterprise objects. You can also check the status of routings which belong to a specific enterprise object by clicking the tab for the EO, then clicking the **In Progress** or **Completed** link.

You can check Process Applications by clicking the **In Progress** or **Completed** tabs in the Process Application special application.

Checking status using searches

You can also search for routings by clicking **Routing Search**. You can type a description to search for all routings that contain that description, or filter routings by date, direction, priority, status, initiator, and more. If you select **All Applications** from the "Application" drop-down, the search will return results from enterprise objects, process applications, and smart forms.

Related Topics

- [Routings defined](#) on page 35
- [Editing routing selections](#) on page 49
- [Forwarding routings](#) on page 52
- [Initiating a process](#) on page 54
- [Using notes](#) on page 40

The Drafts screen

The Drafts screen displays processes that you have begun by entering information, but have not yet routed. Saved processes are available from the Drafts screen. Drafts may be routed or deleted. After a draft has been either routed or deleted, it is removed automatically from your Drafts screen.

Related Topics

- [Navigating in routing screens](#) on page 37

Navigating in routing screens

The In Progress, Completed, and Archive screens have additional navigation features:

- **Expanded and collapsed views.** The Received and Sent items lists can be collapsed and expanded.

Click the icon to collapse or expand the view. The number of routings is displayed in the upper-right corner.

Two views to use

- **Quick view of next routing.** When you are in the In Progress screen or the Completed screen and select multiple routings, click the **View Selected Routings** button to go directly to the next routing without returning to the Routing Details screen. The arrows to the right provide the navigation between routings. The left arrow displays a previous routing; the right arrow, the next routing. The up arrow returns you to the In Progress or Completed screen, depending on which screen you started from. You can also move to the next routing by approving, stopping, or rejecting a routing.

Additional navigation buttons

- **Sorting.** You can sort the routings by clicking each header.
- **Select all.** You can select all routings in the list at once to view them in sequence.

Note:

If you have access to 6.0 applications, you can filter your routings by selecting a [Workflow-Enabled Enterprise Object](#) on page 24. This way, you'll only see the routings associated with that object. Alternately, you can see the status of your routings at a glance using your Home tab.

The In Progress screen

The In-Progress screen displays your active routings in which you are a participant, whether initiator or recipient. When a routing has been approved by all approvers, has been stopped, or has been rejected by any approver, the routing is no longer considered to be in progress.

Routings sent to you are displayed in the **Received** area. Routings that you initiated are displayed in the **Sent** area.

Note:

If you share process applications with partner companies, these routings also appear in the applicable area of this screen.

Related Topics

- [Navigating in routing screens](#) on page 37

The Completed screen

The **Completed** screen displays completed routings in which you are a participant, whether initiator or recipient. Routings are considered completed when the routing has been approved by all approvers, has been stopped by the initiator, or has been rejected by any approver.

Routings sent to you are displayed in the **Received** area. Routings that you initiated are displayed in the **Sent** area.

Note:

If you share process applications with partner companies, these routings also appear in the applicable area of this screen.

Related Topics

- [Navigating in routing screens](#) on page 37

The Archive screen

Note:

Remember to use the Company and **Duration** drop-down lists in the upper right of the screen to filter the information correctly when you view the Archive screen.

When viewing routings in your archive folder, select a range. The default setting is "Last 10 days." If you do not have any routings that were archived in the last 10 days in the archive folder, then no routings are listed.

The Archive screen displays completed routings that have been moved to the archive folder.

Archiving the routings allows the Completed screen to display the most current routings. As in the In Progress and Completed screens, archived routings are listed with Sent or Received routings. From the Archive screen you can still view the routing, the routing status, and the routing notes. Routings that have been archived, however, cannot be moved back to the Completed screen.

Note:

If you share process applications with partner companies, these routings also appear in the applicable area of this screen.

Related Topics

- [Navigating in routing screens](#) on page 37

The Application Metrics screen

The Application Metrics screen allows you to run reports or view statistics about routings or export data from multiple routings. Depending on the privileges granted you by your Nsite Administrator, you may run reports for and export data from your own routings, your department's routings, or your company's routings.

Note:

If you share process applications with other partner companies, reports also include statistics for these routings.

Related Topics

- [Navigating in routing screens](#) on page 37

Using notes

Notes are used to communicate to the participants of the routing.

Notes are usually ancillary information that you would not include in the workflow-enabled enterprise object. Although notes are part of the record, they are usually informal comments between the originator and the recipients.

Notes are posted on the "Routing Details" screen. You can click the **Notes** icon to view a routing's notes. If a routing has unread notes, this icon displays text reading "New". The routing originator is shown at the upper left of the screen. The routing originator is the owner of the process and receives directed notes among recipients.

Posted notes show the name of the user who posted the note and the date that the note was posted. After a note has been posted, the note cannot be changed or deleted.

Sharing process applications with partner companies

When sharing process applications with partner companies, the Nsite Administrator for each company determines whether notes should be private or public. When notes are public, participants see the assigned initiators or assigned recipients for the shared process application . When notes are private, only the participants internal to the company can see the list of recipients who can receive notes.

To direct a note:

Select the participant from the Routing Participants list, and move them to the **Directed Notes Participants** list. All recipients may be added at once by clicking the **All Routing Participants** button.

Directed notes may be sent to one or more participants of a routing. Unless **All Routing Participants** is selected, only specified participants and the initiator can see the notes, whether the participant is a registered user or an outside contact.

Note:

The initiator is the owner of the process and always receives notes. Other participants only receive notes when they are directed to that recipient or to all routing participants.

Directed notes are only posted to recipients when the recipient actually receives the routing. For example, if Robert sends a sequential routing to Lutz, Rosie, and Paul, then sends a directed note to Rosie, Rosie only receives the note after Lutz has approved the routing.

The person to whom the routing is sent receives the directed note at the same time as the routing. Recipients may set their preferences to receive an e-mail notification; however, the notification is not sent until the participant receives the routing.

Example

Fred is the initiator of a routing that is sent in parallel to George, Harry, and Hermione, then sequentially to Ron and Al. If Harry sends a directed note to Ron, Ron does not see the note until George, Harry, and Hermione -- the members of the parallel group -- have approved the routing. The initiator of the process receives the note immediately.

If Ron decides to direct a note to all routing participants, but has not approved the routing, then the note is routed to Fred, George, Harry, and Hermione,

but not to AI, because he does not receive the routing or the note until Ron approves the routing.

Sending a message to a specific participant in a process

To send a message to a specific participant that is associated with the process, send a note by clicking the **Post Note** button. You may send a directed message to one, several, or all participants in a routing. As the owner of the process, the initiator always receives directed messages associated with the process.

Note:

If you have other email messages that are concerned with processes, those messages are considered to be outside of the Nsite platform, so they are not associated with the process for process development, logging, and auditing purposes.

Related Topics

- [Using notes](#) on page 40

Defining e-mail users

Email users are different from initiators and outside contacts. Initiators can start their own routings, run reports, and export data. Outside contacts can only respond to routings.

Email users actually have an abbreviated dashboard on which they can review the status of their own routings and allows access to routings in which they participate. They are registered users that are added by an Nsite Administrator and count as licensed users.

Email users receive a notification email when they are first registered by an Nsite Administrator. Included with this initial welcome message are password and user information, as with an initiator. Nsite saves a cookie on their machine to store the credential information.

Note:

If e-mail users use another machine or block cookies, they must log in again.

Email users can:

- Approve or reject routings, or post notes in which they are a participant.

- View the process application and any attachments that are routed to them.
- Receive notification of approved or rejected routings in which they are a participant.
- View the status of routings in which they are a participant.
- Add approvers or reviewers (if the originator allows).

Email users cannot:

- Initiate routings.
- Stop routings.
- Manage their own preferences.
- Delegate routings.

To participate in a routing, e-mail users follow these steps:

1. In the e-mail notification message, click the **Login** button to log in to Nsite to respond to the request.
2. In the **In Progress** tab on the Routing Details screen, to reject, approve, or forward a routing, or to post a note, click the appropriate button.
3. To view the abbreviated Email dashboard, click the up arrow in the upper-right corner of this screen.
4. Click the applicable tab to view their own routings, which they can see in the **In Progress**, **Completed**, or **Archive** screens.

Note:

E-mail users also have access to the Drafts screen and a **Sent** list in the routings screens, because some applications may contain a button for initiating a process.

Including unregistered users in a routing

Note:

The partner management feature only works for Process Applications.

To include people in a routing who are not registered users, you add them as outside contacts. You also have the option of using verified outside contacts, which are similar to outside contacts, but with added personal identification validation.

However, unlike outside contacts, which a user can create to include in an approval process, your Nsite Administrator creates verified outside contacts, which can be added to a routing through the [Select/Sort Participants screen](#)

on page 46. As with all registered users, all users can see verified outside contacts.

Outside contacts show only the e-mail address and are displayed only to the user who added the outside contact.

Adding outside contacts

Using the outside contact, you can add partners, customers, vendors or others into your processes by entering their names and e-mail addresses.

Outside contacts may only be recipients, as approvers or CC recipients. Outside contacts cannot launch workflows. If an outside contact is an approver, this person can approve reject, or post notes, but cannot add approvers even if the initiator of the process allows recipients that option.

If an outside contact is a CC recipient, this person can only view the routing or post notes.

Outside contacts cannot see the Nsite dashboard. They do not count as licensed users.

To add an outside contact

1. Initiate or forward a routing as you normally would.
2. Click the **Select/Sort Participants** button to open the Select/Sort Participants screen.
3. Under the **Outside Contact Quick Add** area, do the following:
 - a. In the **First Name** text box, enter the first name of the outside contact.
 - b. In the **Last Name** text box, enter the last name of the outside contact.
 - c. In the **Email** text box, enter the e-mail address of the outside contact.
 - d. Use the right arrow to add the outside contact to the **Selected Participants** list.
4. Enter as many outside contacts as necessary by repeating steps 3a through 3d.

About verified outside contacts

A verified outside contact is similar to an [outside contact](#) on page 44, but requires additional verification through the use of a Personal Identification Number (PIN). Like an outside contact, verified outside contacts can receive routings, but cannot initiate processes. After a verified outside contact receives the notification e-mail of a routing, this person can view the routing. If a verified outside contact rejects or approves the routing, this person must enter a PIN to register the decision.

Like outside contacts, verified outside contacts do not require a license, so Nsite does not charge for them. Unlike outside contacts, which any initiator can enter at the time of the routing, only your Nsite Administrator can add verified outside contacts.

Verified outside contacts show in the **Outside Contacts** list in the Select/Sort Participants screen. You can clearly see which recipients are verified outside contacts in the Select/Sort Participants screen and the Routing Registration screen, because they have a "(V)" in front of the contact's name.

While outside contacts are only displayed for the user who entered them, verified outside contacts are visible to all users after an Nsite Administrator has added them.

Initiating Routings

The Routing Registration screen

The Routing Registration screen may already display routing recipients. Recipients might be displayed for several reasons:

- Nsite's predictive routing engine (PRE) suggested the routing recipients. The PRE has analyzed your process and determined that your routings containing the information you have entered are usually sent to these recipients in this order.
- The process is a controlled routing, and all routings with this process require that certain people are included on the routing. (For example, all time-off requests go to Human Resource personnel.)
- The process is a controlled routing, and conditions within this process trigger the control. (For example, purchase requests that are greater than a certain amount require a Director's approval.)

- Both controlled routing and PRE suggestions are displayed.
- Initiators can also edit routing selections and forward routings. See [Editing Routing Selections](#) on page 49 and [Forwarding Routings](#) on page 52 for more information.

Process control makes routing rules more complex.

- If process control is in effect, participants have a lock next to their names when they are required approvers. This setting means that you can view the list of participants, but cannot change the order or the approvers. You can only change the duration of the review time.
- If process control is not in effect, the initiator may allow approvers to add more approvers.
- Any participant can add CC recipients. This setting is independent of process control.

The order that recipients are sent routings is determined by (1) where the recipient is in the ordered recipient list from the Select/Sort Participants screen, and (2) whether they are part of a parallel or a sequential routing.

- To route to all recipients in a sequential order, select the **Select Order** check box for each recipient.
- To route to all recipients in parallel, clear any **Select Order** boxes from all recipients.
- To mix and match sequential and parallel routings, see [Combining Parallel and Sequential Routings](#) on page 47.

To start the routing:

1. Select and sort recipient(s) (See [Selecting and sorting participants](#) on page 46.)
2. [Define approvers](#) on page 47.
3. [Define review time](#) on page 48.
4. Click the **Submit** button.

The routing is underway!

Selecting and sorting participants

After successfully completing a workflow-enabled enterprise object, you can select recipients for the routing by clicking the **Route** button.

Nsite remembers routings and keywords, so pre-existing routing information might display.

To select and sort participants:

1. Click the **Select/Sort Participants** button to display the Select/Sort Participants screen.
2. Move the recipients from the **Registered User** or **Outside Contacts** list to the **Selected Participants** list by using the associated right arrow.
Delegated recipients are identified by a (D). Verified outside contacts are identified by a (V).
3. To remove a name from the **Selected Participants** list, use the left arrow.
4. To revise the sequence, select a name and use the up and down arrows to change the position in the **Selected Participants** list.
5. To add, modify, or remove other outside contacts, click the appropriate button under the **Outside Contact Quick Add** area.
6. To cancel a current action, click the **Reset** button.
7. When you are finished selecting and sorting participants, click the **Submit** button.

Combining parallel and sequential routings

In the Select/Sort Participants screen, groups within the ordered list that are to be sent the routing in parallel must be ordered sequentially.

To order the list, see [Selecting and sorting participants](#) on page 46.

To combine parallel and sequential routings

1. Clear the **Select Order** check box for the first person in the parallel group.
2. Clear the **Select Order** check box for the rest of the people in the parallel group.
3. Selection for the next sequential recipient remains as-is.

Note:

You must have a sequential recipient between two parallel groups.

Defining approvers

You define approvers in the [Routing Registration screen](#) on page 45.

To define a recipient as an approver or a CC recipient

1. After you have selected and sorted recipients, you designate whether to make them approvers.
2. For each required approver, select the **Approval Required** check box for the associated recipient.
3. For each recipient to whom you want to send the routing for information only, clear the **Approval Required** check box for the associated recipient.

Defining review time

You define the review time for each recipient in the [Routing Registration screen](#) on page 45.

To define review time

1. After you have selected, sorted, and designated whether to make the recipients approvers, you allocate the amount of review time.
2. In the **Past Due After** column, select the amount of review time.

The total allocated review time depends on the amount of time entered for each recipient and the configuration of sequential recipients and parallel groups.

For each sequential recipient, the amount of review time is added to the total allocated time.

Members of a group receiving a routing in parallel all have the same amount of time to review the routing. The amount of review time for the group (which is the same for any one member because the reviews all happen simultaneously) is added to the total allocated time.

In the example in [Defining Routings](#) on page 35, Lutz and Paul are sequential recipients, so they account for three days in the review. Ryan, Sampath and Ramesh receive the routing in parallel, so they contribute eight hours to the total allocated time for review.

Tip:

When an initiator sends a routing, this person determines the amount of review time for each recipient to approve the routing.

Past-due routings

- Initiators see past-due routings on their dashboard and depending on their settings, also in their daily e-mail notifications.

- Recipients see past-due routings in the **At A Glance** area of the Home screen and depending on their notification setup, they also receive a reminder e-mail.

Note:

The default configuration has notification reminders turned on. With notification reminders turned on, you are automatically sent an e-mail about past-due processes.

Routing rules

Keep the followings rules in mind when you initiate a process.

- Process control predefines approval flows and whether initiators and approvers can add recipients. For more information, see [About process control](#) on page 45. Your Nsite Administrator configures process control.
- After an initiator has routed a workflow-enabled enterprise object, the initiator cannot remove recipients before they have received the routing.
- An initiator can allow or disallow an approver from adding more approvers.
- Only initiators and approvers can change the order of participants in a routing. CC recipients cannot change the order of participants in a routing.
- After a routing has been sent and the user has viewed the workflow-enabled enterprise object, the user can only be changed from an approver to a CC recipient and cannot be removed from the routing.
- You cannot delete routings because of security and compliance concerns. Routings may only be stopped by clicking the **Stop Routing** button. After the routing has been stopped, you can move it to the archive folder.

Editing routing selections

To edit routing selections

1. From the **In Progress** screen, in the **Sent** area, select the routing you want to change.
2. Click the **View Selected Routings** button to display the Routing Details screen.
3. Click the **Edit Routing Selection** button to display the **Edit Routing** screen.

From this screen, you can change the selection order of participants, selected participants, approvals required, the priority, and the review time.

4. Change your selections, and then click the **Submit** button.

Receiving Routings

Routing details

The Routing Information In Progress screen describes various aspects of a routing.

Routing Initiator	The person who originated the routing.
Priority	The priority set for the routing by the initiator.
Process Application	The name of the process application.
Notes	<p>Displays whether notes have been posted to the routing. If a note has been posted to the routing, a Notes icon appears.</p> <p>The posted Notes icon shows that a note, which has been read, is attached to the routing.</p> <p>The new posted Notes icon shows an unread note is attached to the routing.</p> <p>Notes can be posted by the routing originator and by the routing recipients. Notes can be directed to one, more than one, or all participants of a routing and may only be sent among the participants in a routing.</p>

When you view the status of a routing, you see a two-level status screen. The top **Routing Information** line displays an overview of the routing, whether it is in progress or has been completed. The **Participant's Status** area displays the status for recipients, including the time they receive the routing, the action, and the time the action was taken.

About the Routing Information line

The **Routing Information** line displays the length of time set by the originator to approve or view the status for each recipient.

Action	You only have actions for routings in which you are the recipient. An approver must view, approve, or reject a routing. CC recipients may only view the routing.
Order	The sequence of the recipients.
Approval Required	If this check box is selected, the routing requires the approval of the recipient.
Participant	The name of participants in the routing.
Time Received	The time you received the routing.
Time of Action	The time of your action associated with the routing.
Time Elapsed	The elapsed time of the routing (in days) for each routing recipient.
Notes Posted	A Notes or new Notes icon is displayed if there are any notes posted to the routing.

Note:

Anytime an approver rejects a process, whether in a sequential or parallel routing, that routing status becomes **Completed** and the routing ends at the rejection.

To view information about all your routings, see [Running reports](#) on page 66.

Routing Status icons

Nsite uses these icons to indicate routing status.

Icon	Description
	Approved
	Rejected
	Stopped

	Routing viewed by CC recipient
	Routing not viewed, approval decision overdue
	Approval decision is overdue, but has been viewed
	Routing viewed, awaiting approval decision, not overdue
	Awaiting approval decision, not overdue
	Routing delegated
	Routing forwarded
	A note has been posted to the routing that has been read
	A new note has been posted to the routing

Forwarding routings

If the initiator of a routing allows participants to add other recipients after the routing has been initiated, a Forward Routing button associated with the routing appears at the bottom of the screen.

To add participants after the routing has been initiated:

1. In the **Received** area of the **In Progress** or **Completed** screen, select the routing by clicking the link in the **Description** column.
2. Click the **Forward Routing** button.
3. Click the **Select/Sort Participants** button.
4. If more than one recipient is added, define sequential recipients or groups of parallel recipients.
5. *Define approvers* on page 47.

6. [Define the review time](#) on page 48.
7. Click the **Submit** button.

The new recipients are added to the routing.

Receiving routings as an outside contact

Outside contacts can approve or reject, view or post notes to a routing, but they cannot add recipients even when the initiator of the routing selects the **Add Recipient** option.

To receive a routing as an outside contact

1. The outside contact receives an e-mail requesting an approval or rejection of the routing. This person clicks the **View** button to review the routing.
2. If the outside contact is designated as an approver, this person clicks the Approve Routing button to approve the routing or the **Reject Routing** button to reject the routing.

Related Topics

- [Adding outside contacts](#) on page 44

Receiving routings as a verified outside contact

To receive a routing as a verified outside contact

1. Like [outside contacts](#) on page 53, when the verified outside contact receives e-mail, this person can view the routing by clicking the **View** button.
2. After the verified outside contact has reviewed the routing, this person can approve the routing, reject the routing, or post notes to the routing by clicking the appropriate button.
3. To approve or reject the routing, this person must enter the Personal Identification Number (PIN) sent to them when the Nsite Administrator added them as a verified outside contact, and then click the **Submit** button.

Routing Tutorial

Routing tutorial overview

Nsite automates manual processes usually conducted by means of e-mail, spreadsheets, and paper forms that require judgment, decision making, and approval. Nsite is easy to use. After you log in, the Home screen appears.

From the **Home** screen, you can create a new request, check the status of the request in real-time, and run reports.

Example

The example process is the Travel Authorization. The example users are named Sam Rocco and Kaye Bonney. Sam has been assigned a project by her manager, Kaye. To complete the project, Sam needs to travel.

This tutorial guides you through the most common tasks you perform with Nsite. These tasks include:

- [Initiating a process](#) on page 54
- [Routing a process](#) on page 55
- [Setting routing dependencies](#) on page 56
- [Reviewing the status of a process](#) on page 56
- [Generating reports](#) on page 65

Tip:

To learn more, see the [Nsite User Help](#) on page 8.

Initiating a process

Sam needs to make travel arrangements, including airline and hotel reservations, for a three-city trip. In Sam's company, travel arrangements are made through a centralized organization.

To start the process

1. From the **My Nsite** screen in the **Frequently Used** list, Sam clicks the **Travel Authorization** link to start the process.

The Travel Authorization screen appears.

The Travel Authorization routing has several options and text boxes to complete. The text boxes for rates are estimates, so that Karin's manager has an idea of the costs involved.

2. Sam completes the Travel Authorization, filling in the necessary dates for departure and return, as well as details for the hotel, rental car, and travel requirements of the trip.
3. After Sam has entered all the necessary information, he clicks the **Route** button.

Next step: [Routing a Process](#) on page 55

Routing a process

After Sam clicks the **Route** button, the Routing Registration screen appears. From this screen, Karin selects the appropriate people to authorize and make arrangements for the trip.

The **Select Order** column shows 1 for Kaye, 2 for Tina, and 3 for Jane, which indicates this routing has a serial approval process. A serial approval process means Kaye must approve it before Tina sees the Travel Authorization. Tina must approve it before Jane can make the travel arrangements. The **Approval Required** check box has been selected for all three recipients, so they must all approve before the process can continue. In the **Past Due After** column, each approver is allocated a specific amount of time before action is considered to be overdue. Because this routing is a serial approval process, the total allocated time is the sum of each approver's allocated time.

1. If Sam needs to change recipients, she clicks the **Select/Sort Participants** button.

The Select/Sort Participants screen appears.

In the Select/Sort Participants screen, Sam can add other recipients, remove recipients, or change the order in which recipients receive the routing.

Sam can route other processes, such as a Route file with an attached partnership proposal, directly to her partner contacts through outside contacts. Routings are secure, automatically archived, and accessible to participants and management of the Nsite customer.

Sam can add outside contacts quickly, by entering their first and last names, and their e-mail address. David Saliba is an outside contact. Andy Airriess is a verified outside contact. A verified outside contact must enter a personal identification number to view the routing. Verified outside contacts have an extra level of security.

2. After the recipients are selected and ordered, Sam clicks the **Submit** button to return to and complete the Routing Registration screen.
3. Sam clicks the **Submit** button on the Routing Registration screen. The travel authorization is then routed to Kaye Bonney, the first approver.

Next step: [Setting Routing Dependencies](#) on page 56

Setting routing dependencies

Kaye receives an e-mail notification for the travel authorization request that Sam initiated.

1. To review the routing request, Kaye clicks the **Login** button on the notification message to log in to Nsite.

Kaye reviews the routing details of the travel authorization. She wants to post a note to inform all recipients that the budget is \$250 per day for meals, which includes two dinners with partners. The hotel rates should be no greater than \$175 per day. Kaye decides that the note is enough to clarify budget concerns.

2. To post the note, Kaye clicks the **Post Notes** button.

The Add Routing Note screen appears.

3. Kaye clicks the **Save** button to save the note, which displays on the **Routing Details** screen.

This note remains with the routing.

4. To read the note, Sam clicks the **Notes** icon at the bottom of the **Routing Details** screen.

You can archive notes and actions of participants of the routing for future reference after the routing is completed.

5. Kaye then approves the travel authorization by clicking the **Approve Routing** button.

The routing proceeds to the next approver, Tina Tuma. She reviews the routing details and approves the routing.

Next step: [Reviewing the Status of a Process](#) on page 56

Reviewing the status of a process

Sam wants to check the status of her travel authorization request.

1. From the My Nsite screen, she clicks the **In Progress** dashboard tab.

The Routing Information screen appears. All participants in the routing can view the routing by clicking the **Description** link in this screen.

Sam sees that Kaye and Tina have reviewed and approved the routing, which is indicated by the check marks in the Action column. Jane has not yet reviewed the routing, which is indicated by the clock icon in the Action column.

2. To include additional recipients in the routing, Sam can click the **Edit Routing Selection** button.
3. If dependencies change after the travel authorization has been routed, Sam can stop the routing, copy the routing to create a new routing, edit routing selections, and then route the request again using the appropriate buttons at the bottom of the **Routing Details** screen.
In addition, all participants can review the routing status by clicking the **Routing Status** button on this screen.

Next step: [Generating Reports](#) on page 65

User Preferences & Login Information

Managing your profile

The My Profile link at the top of most screens allows you to:

- [Edit your own user information \(name, e-mail address, title, user ID, and location\)](#). on page 59
- [Change your password](#). on page 57
- [Manage your e-mail notifications](#). on page 60
- [Delegate approvals](#). on page 61

Changing your password

Passwords are case sensitive, may include alphabetic and numeric characters, and must be eight to sixteen characters long.

Note:

The minimum length for the password a feature which is alterable by your Nsite Administrator and may require the minimum password length to be ten or twelve characters long.

To change passwords

1. In the **My Preferences** area of the **Manage My Profile** screen, click the **Change Password** button.
2. In the **Enter Old Password** text box, enter the old password.
3. In the **Enter New Password** text box, enter the new password.
4. In the **Confirm New Password** text box, re-enter the new password.
5. Click the **Submit** button.

Note:

You can click the **Reset** button to clear all the fields and start again.

6. If the password has been successfully changed, you receive confirmation that the password has been changed.
Close this screen.

Log-in credentials

There are three pieces of data for a log-in credential: your user ID, company ID, and your private password.

If you have forgotten your user ID or company ID, contact your Nsite Administrator.

Related Topics

- [Changing your password](#) on page 57
- [If you forget your password](#) on page 59
- [Log-in rules](#) on page 58

Log-in rules

Nsite only allows one user ID to be logged on from one machine at a time. You may log on multiple times from the same machine with different user IDs.

If you receive a message indicating you are already logged on to Nsite, click the **Cancel** button to return to the other machine or click the **Continue** button to end the other session.

Note:

If another user is logged on with your name, this session ends immediately.

Related Topics

- [Changing your password](#) on page 57
- [If you forget your password](#) on page 59
- [Log-in rules](#) on page 58

If you forget your password

To obtain a new password

1. On the **NsiteLogon** screen (<https://process.nsite.com/CustomerLogin.jsp>), click the **Forgot password** link.
2. Enter the company ID.
3. Enter your e-mail address.
4. Click the **Submit** button. You receive e-mail notification of your newly assigned password.
5. Make sure you change this password after you log on to Nsite.
For more information, see [Changing Passwords](#) on page 57.

Editing your user information

To edit user information

1. From the top of any screen, click the **Manage My Profile** link.
2. In the **My Information** area, enter the new information in the appropriate text box for the item you want to change.
3. Click the **Submit** button.

Managing e-mail notifications

To manage e-mail notifications

1. Under Email Notifications, in the **My Preferences** area of the Manage My Profile screen, select or clear the check box next to the appropriate e-mail notification item.
2. Click the **Update** button.

You may select from a variety of e-mail notifications:

Notification	Description
Receive daily routing summary	You receive a daily e-mail showing any routings you have sent or received and whether any new routings have been posted.
Immediate email notification of routing completion	You receive immediate notification for any routing in which you are the originator.
Immediate email notification of directed notes	You receive notification of notes directed to you when you receive the routing.
Immediate email notification of new routings	You receive immediate notification of any routings in which you are a recipient.
Exclude automatically approved routings	You can select this option if you have also selected Immediate email notification of new routings . You only receive immediate notification when you receive a routing that requires your approval. If you are added as a reviewer, you do not receive a notification.
Immediate email notification of routing rejection	You receive immediate notification of any routings you have sent that have been rejected.

Delegating approvals

Approval delegation means you can assign another person to respond to your received routings when you are unable to respond. Delegates may be either a registered participant or an outside contact.

Delegation happens when the initiator of the process clicks the route button. If there are already routings in flight at the time the delegation takes place, these routings will not be re-routed.

Scenarios to clarify the begin and end time of routings

Scenarios to clarify the begin and end time of routings:

Christina designates Carlton to be the approver for her routings on April 19th until May 6th.

- Christina is the third person in a sequential routing in the evening of April 18th. Even if the first two approvers wait to act upon the routings until April 19th (when the delegation is supposed to take place), Christina was set as the routing recipient on April 18th when the routing was initiated, so Carlton will not be designated as a delegate. When the routing gets to Christina, the initiator will have to stop the routing and use the **Copy and Start** button to re-route the process. If they leave Christina on the Routing Registration screen, the routing will then substitute the delegate.
- Christina is the third person in a sequential routing on May 6th, the last day of the delegation period. Carlton is set as the delegate on the initiation of the routing. Even if the first two approvers wait to respond until May 6th Carlton will still be the approver, though as the person doing the delegating Christina will see the routing as a CC recipient does. She can view it, but will not be able to accept or reject the routing.

To delegate your routings

1. Under **Approval Delegation** in the **My Preferences** area of the Manage My Profile screen, select the **Enable Approval Delegation** check box. Approval delegation is enabled when the check box is selected. When approval delegation is not enabled, the check box is clear and the fields associated with approval delegation are grayed out and unavailable.

2. If desired, select **Disable Email Notifications When Delegation is in Effect** to block routing notification emails for your delegated routings.
3. Select a beginning date, either by changing the date using the pop-up windows for the day, month or year, or by clicking the calendar icon.
To select a date, you may change months by using the arrows on either side of the month and year title bar. To select today's date, click the link, **Today**.
4. Select an end date, either by changing the date using the pop-up windows for the day, month or year, or by clicking the calendar icon.
To select a date, you may change months by using the arrows on either side of the month and year title bar. To select today's date, click the link, **Today**.
5. Select a delegate from the **Registered Users** list or the **Outside Contact** list.
To add an outside contact, click the **Edit** link next to the **Outside Contact** list. In the **Outside Contact List** screen, click the **Add** button. In the **Add Outside Contact** screen, enter the delegate's name and e-mail address, and then click the **Submit** button. Close this screen, and then select the delegate from the **Outside Contact** list.
6. Enter a message or any instructions you want to send to the delegate.
This message is entered in a free-form text box, so you may send any message you want.
7. Click the **Submit** button.

Note:

- You cannot delegate routings that you have already received.
- Reporting hierarchy routings can be delegated. The recipient does not need to be part of the reporting hierarchy.

Managing time zones

Each user may set their own time zone, so that all time and date stamps for routings are localized to the time zone the user occupies. This ability to localize the setting for each user eliminates confusion for the user. If a user in New York routes a process application to a user in Sydney, Australia, the user in New York sees the correct time displayed and the user in Sydney

also see the correct time displayed, including corrections for Daylight Savings Time or local variances.

Example

If a workflow-enabled enterprise object is routed at 4:10 P.M. on Wednesday New York time, the user in Sydney sees that it was routed at 8:10 A.M. on Thursday morning. (Remember that Sydney is on the other side of the international date line from New York.)

Note:

The time zone setting that is drawn from a non-Nsite global database shows the standard time zone difference from Greenwich Mean Time, regardless of the seasonal time zone variances. The routing status that Nsite displays shows the localized time zone, including the seasonal time zone variances.

To adjust your personal time zone

1. Click the **Manage My Profile** link, which is at the top of most Nsite screens.
2. In the **My Preferences** area of the **Manage My Profile** screen, select your local time zone by selecting a city in the **Time Zone** drop-down list that is in the same time zone as your location.

Note:

Do not change the UTC offset. Changing the city changes the UTC offset. There are very few cases where you should override the UTC offset. The UTC offset is always the same. Sydney, Australia is 10 hours ahead of Greenwich Mean Time (GMT). During Eastern Summer Time for New South Wales, Sydney is 9 hours ahead from London (GMT), and that difference shows in the time displayed. The UTC offset number shown does not change for local variances (it remains +10 for Sydney), but the time displayed takes the local variances into account. The local time may be verified by the **Local Time** text box.

3. Click the **Submit** button.
4. To display the updated time, refresh the screen by clicking the **Manage My Profile** link at the top of the screen, or the **Refresh** button in your browser.

Submitting the time zone change, then refreshing the screen shows the current time for that time zone. Submitting the change updates the database. Refreshing the browser forces the screen to display the current information from the database.

Time zones and cities that are displayed for your company are set by your Nsite Administrator. Cities are given as reference points, because time zone variances are determined by local governments. Two cities in the same time zone, but different countries may have different local variances.

Note:

Routings processed before the release of the time zone and date localization feature are added to the Nsite platform, but are not updated to display the localized time zone.

Related Topics

- [Overriding the UTC offset](#) on page 64

Overriding the UTC offset

The UTC offset is updated periodically to match Daylight Savings Time changes or other local variances.

Localization of the time zone and date stamp is accomplished by an offset from Greenwich Mean Time (GMT). London is in the GMT time zone. Paris, which is in an adjacent time zone, is one hour ahead of London, so its Universal Time Code (UTC) offset is +1. New York is five hours behind London time, so its UTC offset is -5. Normally you would not want to adjust the offset, but the option is available.

A company's time zone is set globally for each company by the company's Nsite Administrator and is usually the time zone for the headquarters of the company.

Time zones and cities displayed for your company are also set by your Nsite Administrator. Cities are given as reference points for the UTC offset, because time zone variances are determined by local governments. Two cities in the same time zone, but different countries may have different local variances. If the UTC offset from the global database does not match the local variance set by the local government, users have the option to change the UTC offset.

Caution:

Changing the UTC offset in the Manage My Profile screen may result in inaccurate displays for your routings when you view their status. However, this change does not affect another user's display of the time of the routing.

Related Topics

- [Managing time zones](#) on page 62

Reports

Generating reports

Reports track all information from routings. The simplest report allows you to view metrics, the time you have taken to respond to routings, and the time others have taken to respond to routings you have initiated.

To generate reports:

1. From any screen, click the **Application Metrics** tab.
The Application Metrics screen appears.
2. To view the metrics for your routings, click the **My Metrics** link in the **Reports** column.
The My Metrics screen appears.
3. To generate the report, click the **MYO Metrics** link in the **Reports** column.
The My Metrics screen appears.
4. Click the **Create Report** button.
The report displays beneath this screen. You can add this report to the **Frequently Used** list of reports on the **My Nsite** screen. You can save the report selection criteria for future use by clicking the **Save Parameters** button.

Depending on your user preferences, you may be able to see your routings, or department-wide or company-wide routings as well. You may export data to HTML or Excel files using the same selection criteria that you did to create a report.

Running reports

You can run reports to check the status of routings.

To run reports:

1. Click the Application Metrics tab.
2. Select the type of report you want to run (for example, Company Status Report).

Note:

The type of report you may select depends on privileges given to you by your company's Nsite Administrator.

3. Set the selection criteria.
 - a. Select the date range.
 - b. Select initiators and departments for routings you have received.
 - c. Select recipients and departments for routings you have sent.
 - d. Select the Routable EO SmartForm from which to gather data.
 - e. In the **Routing Status** area, select the applicable check boxes for routings sent.
 - f. In the **Routing Priority** area, select the applicable check boxes for routings sent.
4. Click the **Create Report** button.

You receive a group of statistics about the routing criteria you have selected. The total number of routings appears below the **Company Status Report** heading. For in-progress routings, the name of the next reviewer appears in the last column. For completed routings, the time approved appears in the last column.

Note:

For SmartForm users, the drop down list of process applications includes SmartForms.

Routing statistics

1. Click a number in the routings display line to view a selected list of routings.

The list displays 14 routings at a time for ease of viewing.

2. To access each individual routing, click the name of the routing in the **Description** column to see the process and the actions taken by each participant.
3. To save the selection criteria for future use, click the **Save ReportParameters** button after the report has been run. Name the report to save it.
4. To route the report, click the **Route Report** button.
5. To run the report with different selection criteria, click the **Reset Form** button.

Exporting data from reports

You may export routing information from a report to either an Excel file or an HTML file.

To export data

1. Click the Application Metrics tab.
2. Select the type of data export you want to perform.
The type of data export you may select depends on privileges given to you by your company's Nsite Administrator. The three types of data exports are individual, departmental, and company-wide.
3. Set the selection criteria for the export parameters.
 - a. Select the date range.
 - b. Select initiators for routings you have received.
 - c. Select recipients for routings you have sent.
 - d. Select the process application to gather data from.
You may only select one process application at a time, because different process applications format data differently.
 - e. In **Export Data Format**, select **Excel** or **HTML**.
4. Select or deselect routing attributes in the **Routing to Include** area.
5. Click the **Export Data** button.

A browser window automatically opens to display the Excel data or HTML data.

Using Report Builder

Report Builder provides another step in the ability to locate information. With Report Builder, you can create a query for each routable enterprise object. These queries present searchable fields, so the report can produce specific field information.

To access these queries, you must first create or select a query.

1. From the application tabs, select **Application Metrics**.
2. Click the **Report Builder** link.
3. Select a specific **Enterprise ObjectProcess Application**.
4. Select a Report or if no report exists, create a query, by clicking **Build Report** (how to build a report).
5. Select **Date Routing Sent**, **Sent To**, **Sent By**, **Routing Status**, and **Routing Priority**.
6. Enter search information into the field presented.
7. Click **Run Report**.

How to build a report

1. In the Report Builder screen, click the **Create New Query** button.
2. In the **Report Name** text box, enter a name for the report.
3. Select the **Filter Type**.
4. Select the field.
5. Enter a label for the field.
6. Add filters as necessary.
7. Click the **Next** button
8. Order the fields by selecting the row, then using the up and down arrows.
9. Add routing/application attributes as necessary.
10. Click the **Finish** button.

Application Center

Nsite application center

Nsite provides applications which Administrators may add to your Nsite account. With these Nsite applications your application developers may

- Use them
- Customize them to meet your business' unique needs

Using the Quote and Proposal Application

Using the Quote and Proposal application

Nsite automates and improves the efficiency of the inherently variable quote and proposal management processes within your company, across your channel partners and to your customers. Nsite supports the whole quoting cycle including quote creation, product configuration, pricing, approval workflow, proposal generation, quote presentment and reporting and analysis. To meet your unique business needs, the application is also highly customizable through simple drag-and-drop functionality. Users of CRM solutions such as Salesforce can seamlessly integrate the quoting functionality through a simple Web services wizard that allows real-time data exchange.

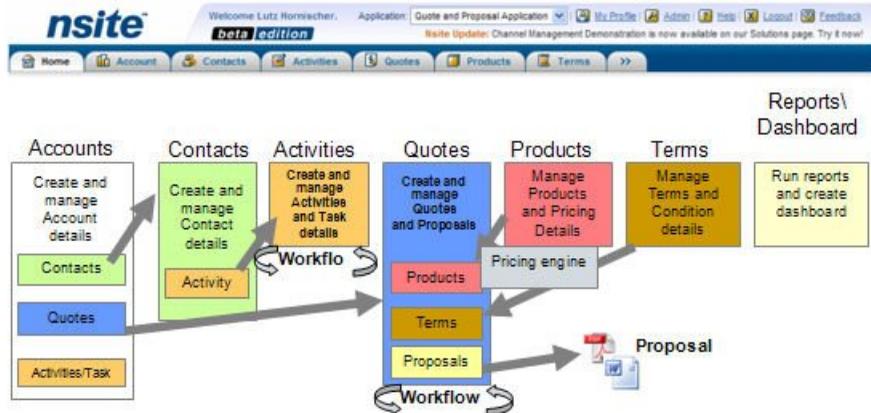
Nsite's unique routing engine make it an ideal solution for managing quotes and proposals. You can manage workflow and approvals of special pricing and non-standard terms across your channels, get visibility and control into margins and discounting issues, and ensure that quotes are accurate, competitive, and timely.

- Increase Revenue: Increased intelligence about quote process, bid to selection analysis, margin analysis, competitive bids, discounting strategies
- Improve pricing controls and compliance (SOX): Workflow and structured, auditable quote process
- Reduce time to quote: Faster approvals, eliminate bottlenecks, automate proposal preparation

With Nsite, companies can automate and improve the efficiency of sales and service processes AND at the same time provide for an audit trail, enforce policies, and adhere to the rules of your regulatory environment (SOX).

Features

- Ability to launch quote, populate data and synchronize pricing and product data reduces errors and response times, and increases sales productivity
- Gain real-time visibility into approval process and automate proposal generation and quote presentment.
- Provides capabilities for aggregating and analyzing Quote history, trends and total



Update activity

Updated activities with time stamp and posted notes when quote is approved

History Generate quote history from Reporting tab

Quote application integration with Salesforce

To prepare a quote that includes Salesforce CRM information, you can use a pre-defined quote process application to obtain product, support, and services information in real-time.

Salesforce can be used for:

- Quote Creation: Create a quote and launch approval directly from Opportunity in salesforce.com. Pre-populate key data into quote.
- Product catalog: Launch salesforce.com product catalog and select product items. Synchronize discount pricing between Quote and Opportunity.
- Create activity: Nsite automatically creates an activity in Salesfore.com when Quote is submitted for approval
- Status tracking: Track status Track approval status in real-time from 'In Progress' tab and also through custom link in Opportunity.

To create a quote with Salesforce

1. From the **any** screen, select **Salesforce Quote and Proposal** from the **Applications** drop-down menu.

The Salesforce Setup Authentication dialog box appears.

2. Log in to Salesforce using your user name and password. Select the **Set SOAP Compression** check box to enable file compression.

Enabling file compression improves performance for client-server applications by optimizing data transfer across a network that communicates using XML Web services.

3. Click the **Submit** button.

Note:

To clear the entries for the Login and Password text boxes, click the **Delete** button.

4. In Salesforce, navigate to the **Opportunities** screen.
5. In the **Recent Items** list on the left side of the screen, click the name of the opportunity you want to view.

6. In the **Nsite Quote Management** section, click the **CreateQuote** link.

The Nsite Login screen appears.

7. Log in to Nsite with your company ID, user name, and password.

The Quote Application for Salesforce screen appears.

Note:

The Nsite session times out after 24 hours of no activity.

8. The **Customer Information** section requires you to provide certain information:
 - a. In the required **Company** text box, enter the name of the company that requested the quote.
 - b. In the required **Quote Description** text box, enter the description for the quote.
 - c. In the required **Contact Name** text box, enter the name of the person who requested the quote.
 - d. In the **Email** text box, enter the e-mail address of the person who requested the quote.
 - e. The **Date of Quote** text box is automatically filled in with the effective start date for the quote.
 - f. In the **Quote #** text box, you do not need to enter any data.
When you route the quote internally for approval, Nsite automatically assigns the routing ID, which is used as the quote number.
 - g. In the required **Quote Expires** text box, click the **Calendar** button to select the effective end date for the quote.
The quote is no longer considered valid after this date.
 - h. In the **Phone** text box, enter the telephone number of the salesperson.
 - i. In the **Email** text box, enter the e-mail address of the salesperson.
9. The **Quote Actions** section allows you to update the Opportunity changes or create a Proposal.
 - a. Click the **Update Opportunity** button to update Nsite changes into Salesforce.
 - b. Click the **Create Proposal** button to automatically generate a proposal based on the data in this opportunity.
10. The **Products** section allows you to connect to Salesforce to obtain product pricing information for selected items. To add a row, click the  icon. To remove a row, click the  icon.
11. The **Support** section allows you to connect to Salesforce to obtain support pricing information for selected items. To add a row, click the  icon. To remove a row, click the  icon.

12. The **Services** section allows you to connect to Salesforce to obtain services information for selected items. To add a row, click the  icon. To remove a row, click the  icon.
13. In the **Quotation Summary** section, the extended totals automatically appear for the combined products, support, and services sections. In addition, the total amount, total discount, and extended subtotal appear for the combined products, support, and services sections.
 - a. In the **Shipping & Handling** text box, enter the charge for shipping and handling for all items.
 - b. In the **Estimated Tax** check box, enter the percentage for the estimated tax charge.
 - c. The **Total Extended Quote Amount** text box is automatically filled in for the combined products, support, and services.
 - d. In the required **Currency** drop-down list, select the applicable currency.
14. In the **Terms and Conditions** section, select the **Accept Terms** check box to accept the Nsite terms and conditions and obtain electronic acceptance of the quote from Nsite.
15. In the optional **Notes** text box, enter any additional requirements you want to include.
16. Click the **Save** button to save the quotation data.
17. If you need to route the quote to obtain internal approval from management or external approval from customers, click the **Route** button. For information about routing a process application for approval, see [Defining Approvers](#) on page 47.
 - a. Print the quote and then sign and date the form to approve the quote.
 - b. Send the approved quote to Nsite Software for its acceptance. You can send the quote electronically, fax it, or mail it.

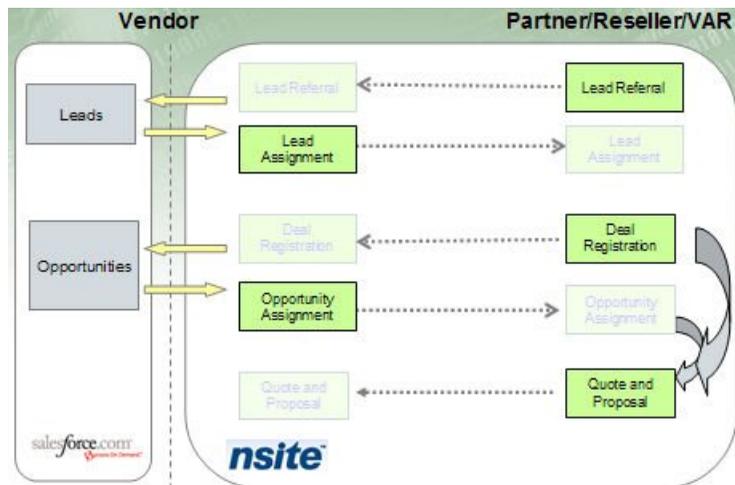
Using the Channel Management Application

Using the Channel Management application

The Nsite Channel Management application helps you improve channel efficiency and visibility by providing channel partners with access to applications that facilitate and speed up the sales process.

The Nsite Channel Management application enables more effective interaction with your channel partners, beginning with lead referral, opportunity assignment, deal registration, and quoting. All applications are based on a single approval workflow and dashboard, which provides you with complete control and visibility across all activities in all parts of the sales channel, direct and indirect, and various levels of third-party sales partners.

The integrated suite of channel management applications is also highly customizable through simple drag-and-drop functionality. Users of CRM solutions such as Salesforce and Siebel CRM OnDemand can seamlessly integrate the quoting functionality through a Web services wizard that allows real-time data exchange between the two applications.



Lead Referral

Nsite's Channel Management application features a [lead referral enterprise object](#) on page 75. A lead referral takes place when a channel partner finds an opportunity and refers it to a vendor.

Lead Assignment

The channel manager can use the [Lead Assignment](#) on page 76 tab to delegate leads that were referred by another channel partner.

Deal Registration

A deal is a qualified lead that can be submitted by a channel partner into the CRM system to ensure that there are no conflicts or interferences with other partners.

Lead referrals

Lead referrals are used to accept leads from channel partners. Leads are usually referred to the Channel Manager when the partner determines that they are not equipped to pursue the deal and the Channel Manager may be able to direct the deal to other resources that are more capable of closing the deal. Lead referrals are usually evaluated based on the quality of the lead or the ability to close the deal.

As with most cooperative efforts in channel management, lead referrals require a considerable amount of trust by the participants in the channel. Lead referrals help track and manage partner interactions for potential deals and successfully completed deals.

The Lead Referral creates and qualifies the lead through a series of questions, such as defining the quality of the lead, the source of the lead, and information about the lead's needs.

Leads and Customer Relationship Management (CRM)

Usually lead referrals are integrated with a CRM system to ensure lead management and tracking are accurate across all channels, whether direct and indirect. Nsite cannot assume you are using a CRM system; however a CRM system may be integrated with Nsite.

The participants in the lead referral scenario are the manufacturer's or service provider's channel manager and partners.

Scenario

The channel partners send leads to the Channel Manager in cases where the lead is more appropriate for the manufacturer or service provider to work on directly. The Channel Manager may reassign the lead to another channel partners. The partner who submits leads to the manufacturer or service provider is encouraged to submit leads to the manufacturer through a partner incentive program.

Lead assignments

Lead Assignments are used to direct leads to channel partners.

The Lead Assignment process application provides channel partners with information to qualify the lead. Their acceptance of the assignment communicates to the Channel Manager that a particular channel partner is working on the deal.

Leads and Customer Relationship Management (CRM)

Usually lead referrals are integrated with a CRM system to ensure that lead management and tracking are accurate across all channels, whether direct and indirect. Nsite cannot assume you are using a CRM system; however, a CRM system may be integrated to Nsite.

The participants in the lead assignment scenario are the manufacturer's or service provider's channel manager and partners.

Scenario

Channel Managers can perform the following:

- Manually generate leads for assignment to route to channel partners using the Lead Assignment process application.
- Use Web services integration, such as custom Web links from Salesforce or Siebel Systems to send leads from those systems to Nsite for assignment to channel partners.

You can track the status of leads or effectiveness of the specific channel partner to complete deals.

Deal Registration Request

The Deal Registration Request is used to eliminate channel conflict and provide visibility into deals so you can support your sales-side channel partners. With this visibility, you can help your channel partners to effectively market and sell your products, instead of your competitors' products.

The participants in the deal registration scenario are the manufacturer's and service provider's channel manager and channel partners.

A scenario that describes the use of the Deal Registration Request follows:

Scenario

Your channel partner is working on a deal for your product. She wants to register the deal with you by using a Deal Registration Request to ensure you and other partners do not interfere or conflict in the deal.

Possible actions

The Channel Manager approves the deal if no other channel partner is working on the same deal. The Channel Manager may also consider using their own direct sales team or sales support staff in addition to the partner's resources to support the initial request.

Use Nsite to route the approval internally to ensure all other Channel Managers and direct sales teams agree with your proposal; if you find that another channel partner or direct sales team is working on the deal, you can reject the request with valid reason.

Opportunity assignment

Opportunities are well-qualified leads. The opportunity is qualified with a need to buy, budget, product interest details, and purchasing time frame. The Channel Manager determines that the opportunity would be best pursued by channel partners rather than the direct sales team.

Scenarios

The Channel Manager generates new opportunities or reassigns leads or opportunities from internal sales teams or other channel partners to specific channel partners with the resources and capabilities to provide the highest probability of winning the deal.

Usually the opportunity comes from internal sources, such as a marketing-generated lead, internal sales lead, or from external sources. For example:

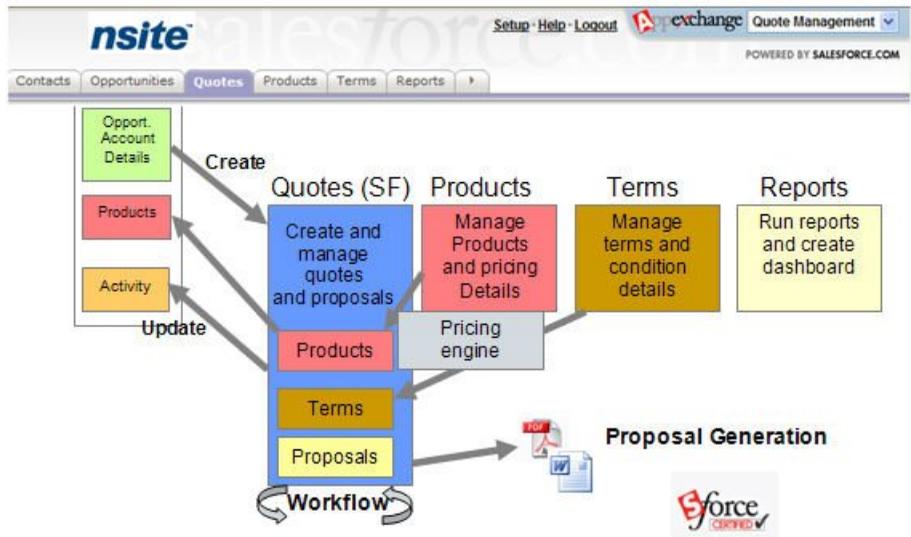
- The internal sales team determines the opportunity to be better suited for channel partners.
- A well-qualified lead was submitted by another channel partner to the Channel Manager.

The target channel partner either accepts or rejects the opportunity. After the Opportunity Assignment is accepted, the Channel Manager can track the status of the opportunity. After the Channel Manager rejects the Opportunity Assignment, the Channel Manager can reassign the opportunity to another VAD or VAR.

Integrating Channel Management with Salesforce

If you are a Salesforce.com customer, you can pull opportunity and account data from Salesforce.com in order to create a link between the it and Nsite. Using Salesforce.com and Nsite together, you can assign roles, manage products and pricing, set terms and conditions, run reports, and send product and activity information back to Salesforce.com.

Your Administrator is responsible for configuring the integration with Salesforce.



Index

A

applications
defined [22](#)
See also Process Applications. [22](#)
selecting [24](#)

B

browsers
configuring [10](#)
supported by Nsite [9](#)

C

Channel Management application
using [73](#)

D

dashboard
components of [33](#)
navigation bar [31](#)
dashboards, personalizing [34](#)
data
exporting from reports [67](#)
Deal Registration Request, overview [76](#)

E

email
defining users [42](#)
managing notifications [60](#)

Enterprise Objects
definition [24](#)
editing details [30](#)
editing summary interface [29](#)
exporting data [30](#)
finding records [27](#)
generating proposals [30](#)
navigating tabs [27](#)
using main page [27](#)
using the Quick Create function [29](#)
viewing details [30](#)
viewing summary interface [29](#)
EO. See Enterprise Objects. [24](#)

F

frequently asked questions [19](#)
Frequently Used list, working with [33](#)

H

help
accessing application help [20](#)
accessing help for Enterprise Objects [20](#)
accessing platform help [20](#)
frequently asked questions [19](#)
printing topics [21](#)

L

lead assignment, overview [76](#)
lead referrals, overview [75](#)

Index

M

My Profile, managing 57

N

Nsite

- accessing help 20
- accessing the system 58
- application center 69
- browsers supported 9
- frequently asked questions 19
- getting started 21
- integrating with Salesforce.com 78
- integration with Salesforce 22
- log-in credentials 58
- navigating 15
- new features described 17
- overview 8, 69
- Support navigation bar 32

O

- opportunity assignment, overview 77
- outside contacts
 - adding 44
 - including in routings 43
 - receiving routings 53
 - verified 45
 - verified, receiving routings 53

P

- passwords
 - changing 57
 - obtaining new 59
- proposal generation 30

Q

- Quote and Proposal application
 - features of 69
 - using 69
- quotes, creating with Salesforce.com 70

R

- Report Builder, using 68
- reports
 - generating 65
 - using Report Builder 68
- routings
 - Application Metrics screen 40
 - Archive screen 39
 - checking statistics 66
 - checking status 66
 - combining parallel and sequential 47
 - Completed screen 39
 - consequences of rejecting 35
 - defined 35
 - defining approvers 47
 - defining review time 48
 - delegating approvals 61
 - Drafts screen 37
 - editing selections 49
 - forwarding 52
 - In Progress screen 38
 - including outside contacts 43
 - navigating screens 37
 - obtaining status of 36
 - parallel 47
 - receiving as a verified outside contacts 53
 - receiving as an outside contact 53
 - routing details 50
 - Routing Registration screen 45
 - rules 49
 - selecting and sorting participants 46
 - sending messages 42
 - sequential 47
 - status icons 51

routings (*continued*)
 using notes [40](#)
 working with [35](#)

S

SalesForce.com
 creating quotes with [70](#)
 integrating with Nsite [78](#)
 integration with Nsite [22](#)

T

time zones, managing [62](#)
troubleshooting
 attached files in routings fail to open or save
 [13](#)
 browsers
 configuring [10](#)
 messages do not appear [10](#)

tutorials
 routing
 overview [53](#)
 reviewing the status [56](#)
 routing a process [55](#)
 setting dependencies [56](#)
 starting a process [54](#)

U

unregistered users. See outside contacts. [43](#)
users
 editing information [59](#)
 UTC offset, overriding [64](#)

V

verified outside contacts [45](#)

Index