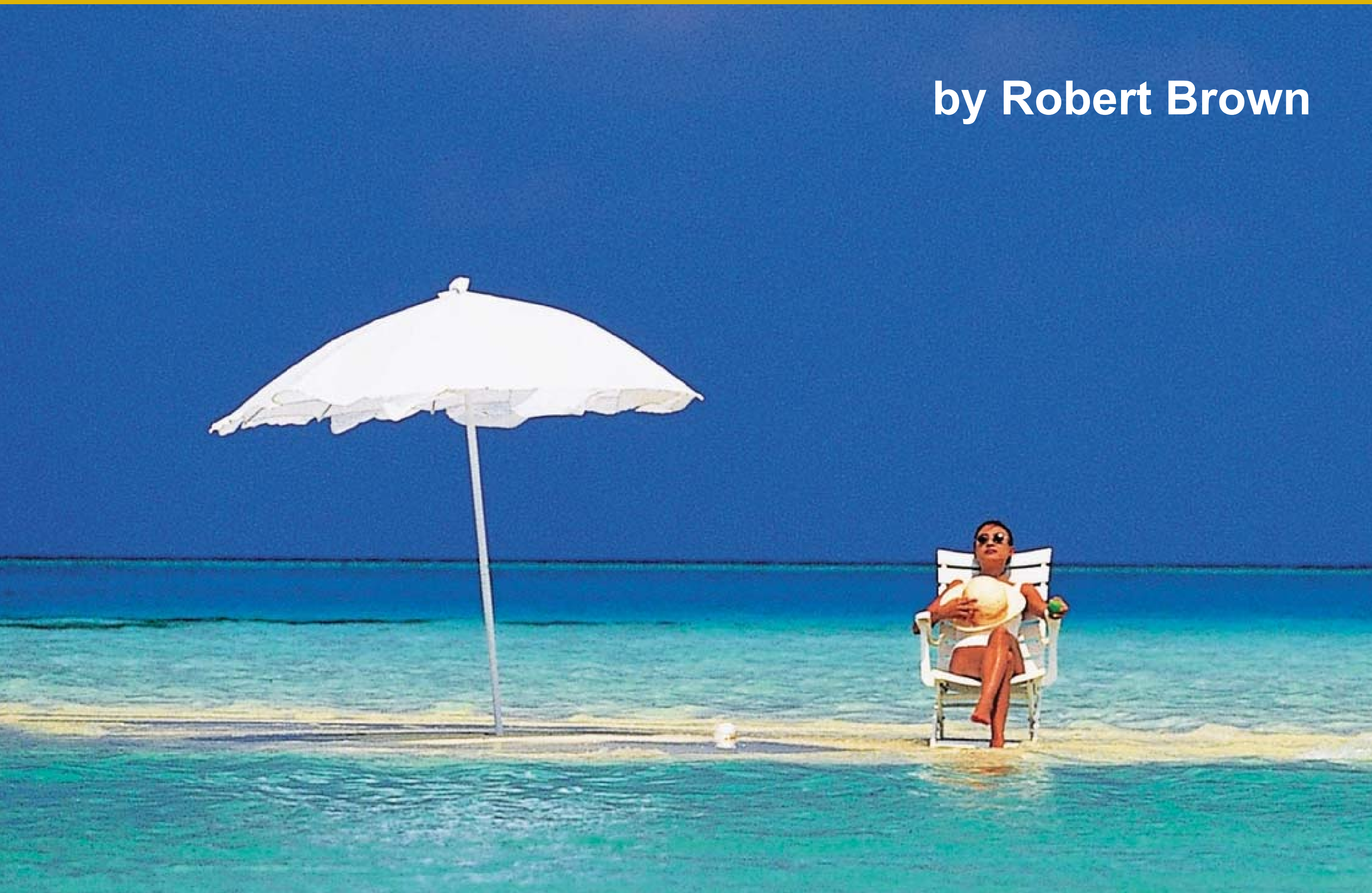
nsite™

How to Build Applications Using Nsite 6.0

Build your application in a day

and spend the rest of the week on the beach

by Robert Brown



Building Applications with Nsite

Tutorial

Version 6

April 2006

Nsite Software, Inc., 7031 Koll Center Parkway, Pleasanton, CA 94566

Contents

Please report any inaccuracies, inconsistencies or other issues with this document. If you have suggestions for the improvement of the documentation or the features, please send them to support@nsite.com, or put them up on Nsite's community forum at nsiteforums.com.

What Can I Do With Nsite?

With Nsite Version 6.0 Nsite delivers the On Demand Enterprise. Nsite Version 6.0 enables you to develop, customize and immediately deploy enterprise applications through a browser with no coding. Companies can now have enterprise applications that match their unique requirements without the enterprise price tag. For far too long businesses have had to work around the constraints of enterprise software, finding much less reliable manual means, like email and spreadsheets, to solve problems which enterprise applications have been too inflexible to add quickly or cost effectively. With Nsite 6.0 you no longer have to rely on email and spreadsheets to manually run these critical operations such as quoting, purchase requests, project management, hiring, and more.

Business Your Way

Nsite dramatically reduces the time and cost to use, customize and build applications, while instantly delivering applications that work the way your business works.

Use it: Nsite delivers an ever expanding set of on demand applications built on the platform. These offerings currently include Quote, Proposal and Channel management solutions for Sales Automation.

Customize it: Nsite allows you to customize applications through simple drag–and–drop and point and click ease while also providing a robust deployment model with testing and versioning.

Build it: Nsite enables you to rapidly build simple and complex applications with configurable workflows, enterprise objects, lookups, security, integration, events handling, relationships, roles, and dashboards without any coding.

The Power to Solve Your Business Challenges Fast

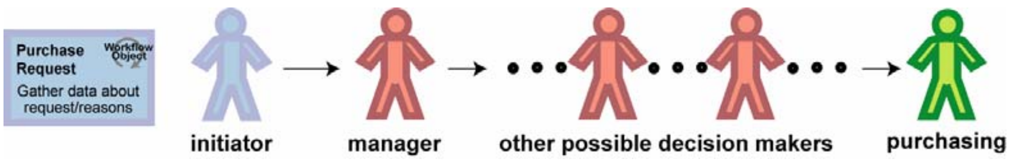
Nsite Application Builder was built for users that have knowledge of how organizations work, but don't necessarily have software developer skills. However, from initial feedback we have received, software developers appreciate the flexibility, speed and power of our application platform as well. Nsite's Application Builder is meant for

- the spreadsheet guru
- the Manager or Lead who is trying to get their team on the same page, or to follow a process
- the project manager who wishes there was a better way, but uses the tools he or she has (like e-mail and spreadsheets) to track status
- the IT department, that needs to provide enterprise class support, but does not have the development or engineering resources
- the CEOs, CIOs, and CFOs who know their organization's situation and need customized enterprise class applications, but do not have the money, time, or development resources to purchase, have consultants or their own staff customize standard ERP applications

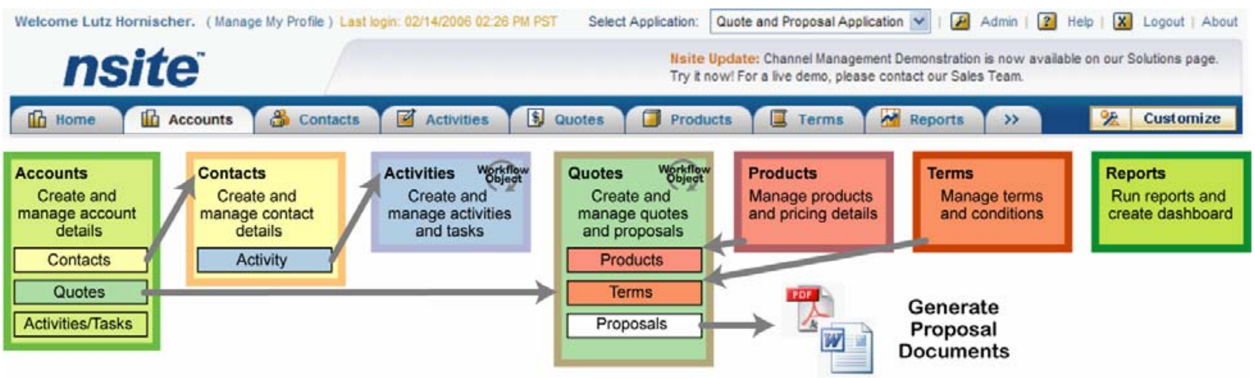
The driving force behind Nsite is a new revolutionary approach to put the power to create solutions in the hands of the individuals in your company who best understand the problems that need to be addressed. Nsite's mantra is: "make it easy; make it powerful; make it affordable."

From Simple Applications to Complex Applications

Nsite Enterprise Applications can be as simple as a single form, like a purchase request, which can be routed to managers and purchasing agents for approval.



Nsite Enterprise Applications may also be very complex with several different screens for capturing essential data and managing processes like the Quote and Proposal Application or the Recruiting Management Application, which is used as the reference application for this document.



With Nsite you can easily create interfaces, relationships, and information modeling to solve problems unanswered by other enterprise applications. And Nsite Enterprise Applications can be built by business analysts who understand the problem unique to each organization. Application builder allows you to easily build and deploy applications such as:

- Purchase Requests
- Expense Reports
- Timesheets
- Time off Management Request
- IT Service and Equipment Requests
- Bug Tracking Application
- Contact Management Application
- Recruiting Management Application
- Channel Management Application
- Quote and Proposal Application
- Project Management Application
- Help Desk Application
- ...

Not only can you create solutions to common situations, but with integration Nsite can be the glue tying together these and other ERP and CRM applications.

What is an Nsite Application?

Nsite applications are enterprise class applications that can easily be built, customized and deployed by customers and partners through a browser. Nsite applications consist of menus, enterprise objects, and application components. These application components appear as normal html fields to the user, but they are called controls because they may contain input validation, display formatting, or have interface events triggered from the user's interactions. At the core of Nsite applications functionality are the enterprise objects which define the data model, the interfaces, and the functionality of the application. Nsite applications leverage core platform services such as access security, reporting, dashboards, Web Services, workflow, and document generation.

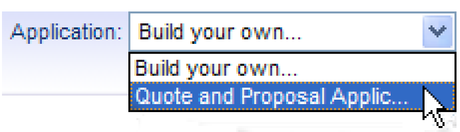
The best way to understand what you as a developer need to put into an application, is to consider what the user needs and will experience. A little planning helps greatly in creating a useful, meaningful application.

Nsite applications have a specific structure. There is an application selection menu. Each application contains tabs to access the user's home page, web pages, or enterprise objects.

Applications, Tabs, and Enterprise Objects

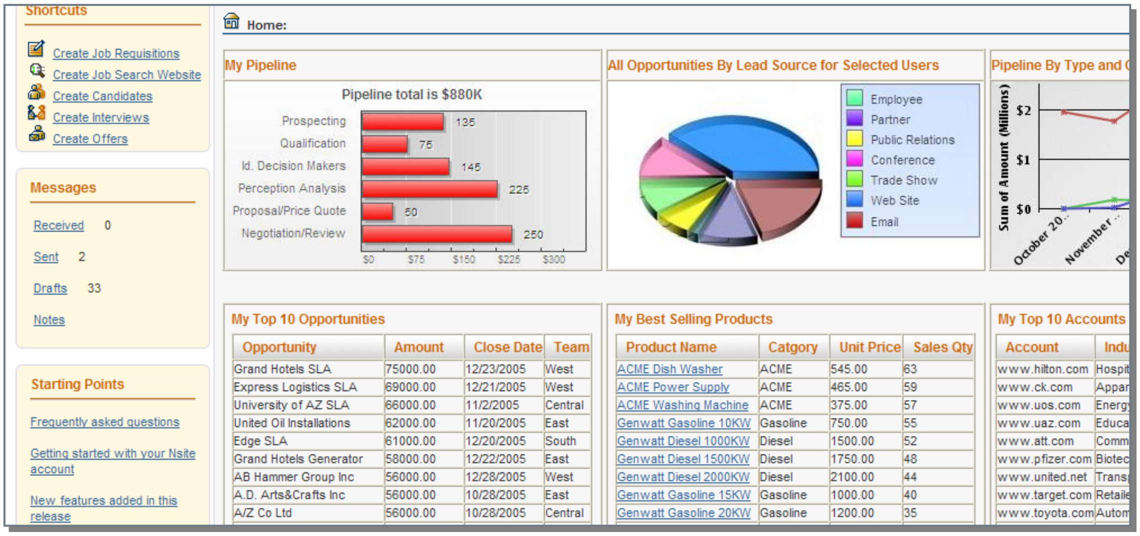
The way a user navigates the Nsite Enterprise Application is through the use of an application menu, a set of application tabs, and the underlying enterprise objects.

To access the application, the user selects the application through a drop down menu at the top of the Nsite screen.



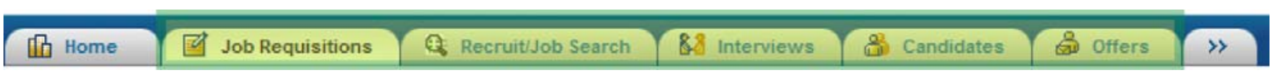
Below the Application drop down are a series of tabs. The tabs access enterprise objects, web pages, or application specific screens such as the Home page.

The Home Tab



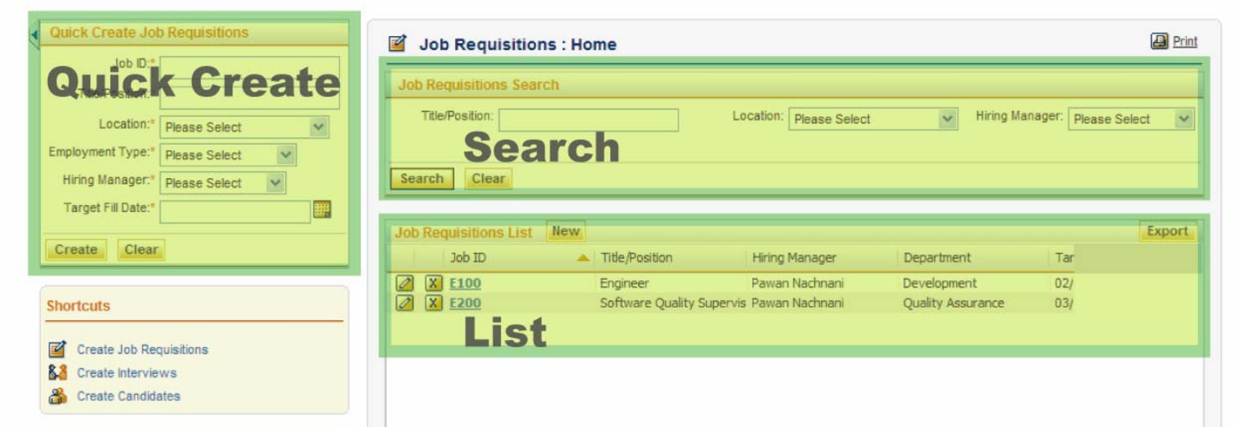
The User's Home Page Dashboard

The Application Home Page Each application has a home page. The application home page is customized by the user. The home page provides views into information important to the user from the application. 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 components (graphs or tables) from which users can select.



The Tabs Associated with the Recruiting Management Application

Application Tabs The application is comprised of a number of tabs. These tabs are associated with enterprise objects or may link to another web page. For the Recruiting Management application Job Requisitions Interviews, Candidates, and Offers are enterprise objects. Clicking the Recruit/Job Search tab displays a recruiters web site.



The Three Panes of the Enterprise Object Home Page

Enterprise Object Home (Access) Page

The Enterprise Object Home page displays Quick Create, Search, and List views for an enterprise object. The access page is made up of three sections. One section, the Quick Create pane provides the minimum fields for creating a new record for the object. The fields required for creation of a record are selected in the control properties for the object.

The search and list panes work together to locate the records the user is looking for. Data the user enters to the search page brings 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.

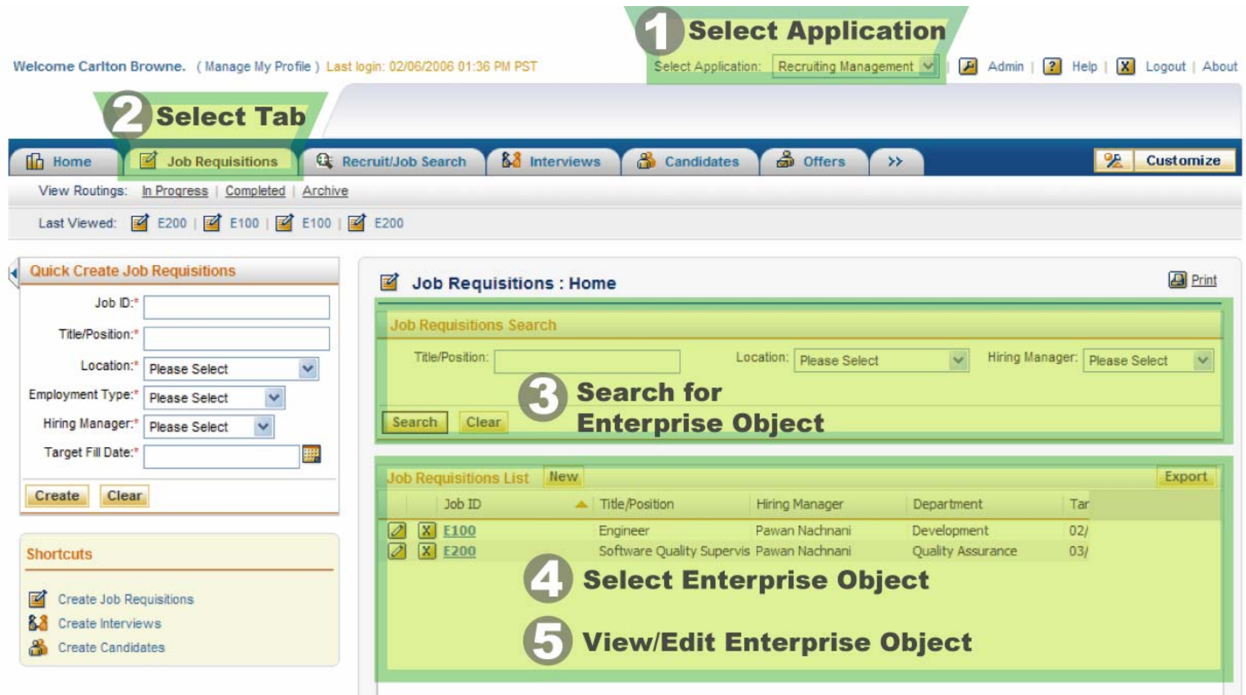
The search fields and the columns for the list pane are also selected in the control properties for the object.

Enterprise Object Full Detail Page

The full detail page is where the user views or edits the information in a record.

User Access to Applications/Enterprise Objects

Users select the application, the tab, then can locate the specific record to edit or view.



1 Select the application

2 Select the tab

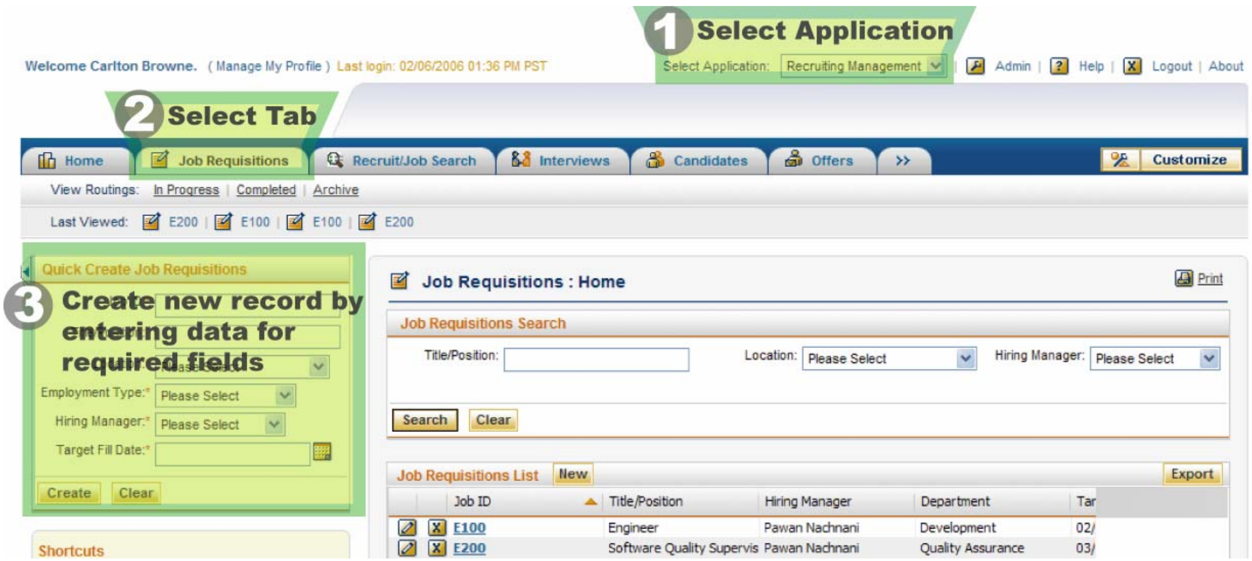
3 Search for enterprise object record(s). Filter the records in the **List** view by entering data in the **Search** fields, then clicking the **Search** button

4 Select the enterprise object record from the **List** view

5 View or edit the enterprise object record detail view by clicking the edit icon

User Creation of Enterprise Object Records

User's select the application, the tab, then enter the minimal information to create a record. When they click the Create button another record is added to the object's list.



1 Select the application

2 Select the tab

3 Add information in Quick Create view, then click the **Create** button

4 A new record is added to the object's **List** view. To edit the record, click the edit icon or the link. The full edit detail view opens; user can then add more information

Building Applications with Nsite

Once the structure of an Nsite application is understood — how users access the application and use the interfaces for the enterprise objects to create, access, edit or possibly route enterprise object records, we can discuss the process for building applications.

Because of the flexibility of the Application Builder you can build applications either from the top down — create the application name, create tabs and associate them with the application, then add enterprise objects and associate them with tabs — or detail up — start with the enterprise objects, then create tabs and associate them with the enterprise objects, create the application and add the tabs to the application.

If you create the application from the top down it will leave holes that you have to fill in. If you create an application, but have no tabs, you will have to create tabs, then go back to the application to create the linkage to the tabs. If you create tabs but have no enterprise object, you will have to create enterprise objects, then go back to the tab to create the linkage to the enterprise object. There are extra steps with this method because you have to create the next level as you move toward the level of greater detail, then make the association from the higher level (application to tab to enterprise object).

If you create from detail (enterprise object) up, then make associations as you go along, the linkage from the enterprise object is available when you create the tab because the enterprise object was created first. Either way you choose to build your applications, it is up to you. Building the enterprise objects first requires greater planning. This document follows the process that you should plan first, build from the most detailed level up.

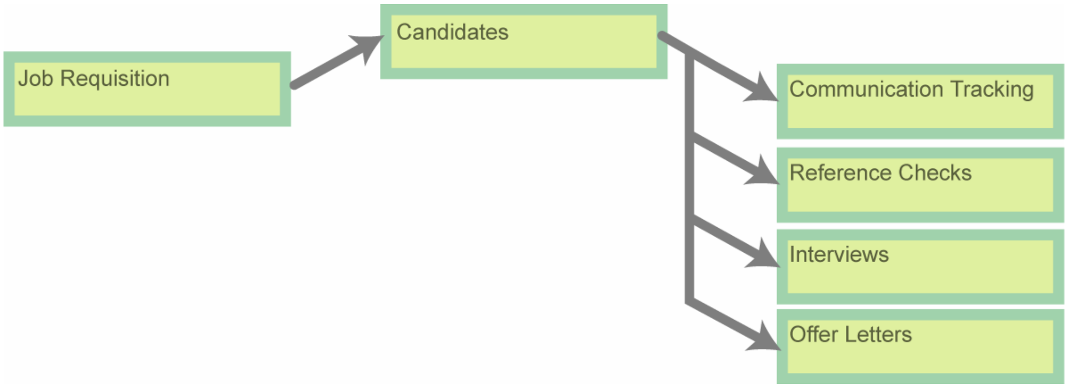
The main part of creating an application is defining the enterprise objects. First you build an interface for capturing and displaying data. This interface, called the detail view, automatically creates the information model and binds the data elements. Extensions to these fields provide input validation and display formatting. The fields you create for the full detail view are also the building blocks of the quick create, search and list panes. The quick create, search and list panes of the main access screen for each enterprise object are created by selecting from the existing controls for the object.

Overview of Building an Application

1 Sketch Your Idea
2 Build Your Application
3 Set Access Privileges
4 Test and Refine
5 Deploy and Use

Sketch Your Idea

We have an idea that most companies of a reasonable size need an easy, cost effective way to define what positions they need to fill as well as a way to get candidates through the hiring process. As with most any project, from designing applications to building … well, buildings, the more planning that you do, the easier the task will be to accomplish.



Ask yourself what enterprise objects you need. The main function of enterprise objects is to capture data to records. The detail/edit screens are the screens for capturing and presenting data. Two main ideas to keep in mind when planning an application are

- who will see the enterprise object? (you can have tabs that are displayed only to a select user or group, for example authorized Human Resources personnel will be the only ones to see offer letters which contain confidential information such as salaries)
- is all the information in the record, or are there associations to multiple records from other objects? The Candidates object will have one record per candidate, however their may be several interviews for each candidate. The interviews object can be access through the Candidates object through a table. Tables are the mechanism to create a one to many association from an object.

For the recruiting management application we decided the minimum number of enterprise objects we would need were four objects — a job requisition object, a candidate object, an interviews object, and a job offers object. At first analysis we thought that tracking the communication with the candidate and the reference checks would be an important aspect of the application, but they did not need to be routed separately as the interviews and offer letter objects would, so we kept them as part of the Candidate object.

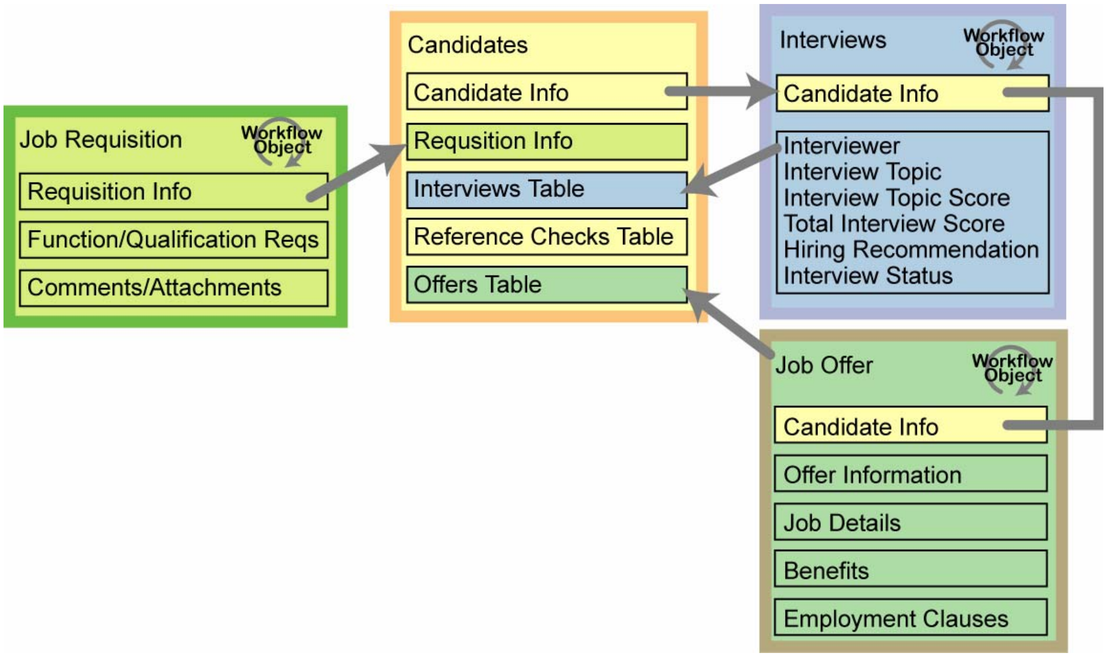
Job Requisitions Defines the job. We need to locate candidates that will fit the criteria for the job. This object is designed to be accessible to managers and other employees who request job openings to be created. We know that usually the employees and managers of departments can define the skills a candidate could bring that would make completion of their group's goals easier. Because management would need to assess and act on these goals we will make this object a workflow object, in other words a request that can be routed.

Candidates The candidate object is the central object of the application. Use this object to match possible candidates to job openings (from job requisitions). The candidate object contains all the pertinent information for the candidate, and tracks the candidates progress through the hiring process.

Interviews Each interviewer is to be routed an interview which helps them define the questions they will ask and provide a score which helps normalize the subjective interview information.

Job Offers This object tracks the offers for each candidate. Since the job offer is a negotiation process, the Nsite platform can track the communication of all the aspects of the negation. The Job Offers object contains standard options for benefits and compensation, as well as non-standard options which can also be tracked. The output of this enterprise object can be an offer letter, either in MS word format or PDF. The application could also be extended to integrate the final agreed options from this enterprise object record to the starting information for the new employee.

The most significant parts of an application are the enterprise objects. The way data from one record is combined with other data creates meaning for each user of the application. With the Application Builder we can map data from one object to another, like mapping requisition information to the Candidates object, or pertinent candidate information to the Interviews and Job Offers objects. We can add tables to an object, like the Reference Checks table that is part of the Candidates object. We can also add tables which integrate information from child objects, such as the Interviews and Offers table from the Candidates object include data from the Interviewers and Job Offers object.



IMPORTANT ISSUES WHEN DESIGNING YOUR APPLICATION:

- What are the relationships between your objects?
- Which objects should be workflow objects and which are standard objects?
- What views do you need into the objects?
- Who needs to see which objects?

Each enterprise object (its detail interface) has an audience. Those who are requesting job positions will see the Job Requisition interface, but not necessarily the other interfaces. Interviewers can be routed the record, so they will not necessarily see the full job requisition object, only the important information from the job requisition which is mapped to the interview object (and interface) from the job requisition object. Access to create, view, edit, or delete is defined through the Roles and Group Management feature.

In the Recruiting Management example application, there is a job requisition object. Each record describes a separate job and the requirements and parameters for the job. As job requisitions are created, candidates are searched for and added.

There is a candidate enterprise object. As Interviews and Reference checks are accomplished they are associated with the candidate. An interview object is routed to each interviewer. As the process progresses candidates are made offers.

The Interviews and Offer tables from the Candidates object gather the interview and offer results from the one each Interview and Offer records. The Interview object creates one record for each interview. Normally a candidate will go through a sequence of interviews, so these one by one records are displayed in a table in the Candidates object. The interviews table shows a snapshot of each interview on a row. All the rows together give the user a composite view.

INTEGRATING DATA FROM OTHER OBJECTS, CHILD OBJECTS, AND LOOKUPS INTO YOUR APPLICATION

When creating an enterprise object interface, you may add lookups, child objects, or map data from other objects.

If you are mapping data from another object, ……..

REASONS WHY YOU SHOULD ADD CHILD OBJECTS TO AN OBJECT

Workflow Object

If you want to be able to route information to users for their approval, group these fields into an enterprise object and enable the workflow option for the object

Different Access to Object/Records

Since access privileges are defined at the object, not field level, you can group fields into an enterprise object, then set different access privileges for the object.

Amount of Data in Child Object or Table

Tables in an enterprise object create additional records for the enterprise object in a one to many relationship. These rows of the table can actually be considered children of the object, however they cannot be accessed separately from the enterprise object. The reference checks table in the Recruiting Management application shows this type of relationship.

A different method is creating a separate enterprise object, such as the interviews enterprise object which creates a one to one relationship with each row in the table. Nsite provides bidirectional updates on the records associated with the table. As interviews are added, new rows are added to the table. If new information (of the information mapped to the table) is updated in the interview object, that information will be updated in the table of the parent enterprise object.

Normally a table should only hold five or six columns depending on the width of the columns. If more information needs to be tracked, use a child object and map only the most important information.

Sophisticated Lookup Object

In the Nsite platform a lookup is a simple semi-static drop down. A good example would be a payment terms lookup in an invoice. While the terms options may change occasionally, they do not change often. The payment terms also are just one description, not several fields.

An example of an enterprise object used as a sophisticated lookup object would be a vendor list. Like the payment terms lookup, the vendor list will not change often. However, the vendor list will have more fields – address, phone, fax, contact, and other fields.

Build Your Application

This process follows the plan first, then build means of developing an application. With the flexibility of the Application Builder, you can use the process that works best for you.

1. Develop Enterprise Object
2. Define Quick Create Fields
3. Define Search and List Fields
4. Create Tab and Associate to Enterprise Object
5. Create Application and Associate to Tab

Develop Enterprise Objects

Nsite's Application Builder creates all the database fields and bindings automatically behind the scenes as you create the full detail enterprise object interface.

Enterprise Objects (EO) are the fundamental building blocks of Nsite Enterprise Applications. The records from these objects are maintained in a database and can be used in many different applications. Data from associated records may be mapped between records from separate EOs to provide meaning to the user.

The database schema for enterprise objects are defined automatically as the developer creates the full detail interface view. In addition to adding fields to an interface and database, you can extend the field to a full fledged control by altering the control properties:

- add input validation by data type (string, integer, float, date, date time)
- add input validation by allowable characters for strings (alpha-numeric, numeric)
- define the actual size of the data field as well as the viewable size in the interface
- output formatting (plain text, US phone, e-mail, social security number, currency (many types), percentage
- linkage to lookups (simple value code pairs) with fuzzy search, so keys entered by the user select the option with the same starting characters
- actions (javascript code with built in functions) that can occur on the change or access of control

Standard Enterprise Objects and Workflow Enabled Enterprise Objects

Enterprise Objects may either be standard objects or Workflow Enabled. A standard object can be created, edited, or deleted. Workflow enabled objects may be routed to others.

Enterprise Objects are defined by a simple check box. Adding the check changes how the Nsite platform and therefore the user works with the object. Workflow objects have associated screens for monitoring the progress through the routing process: In Progress, Completed, and Archived.

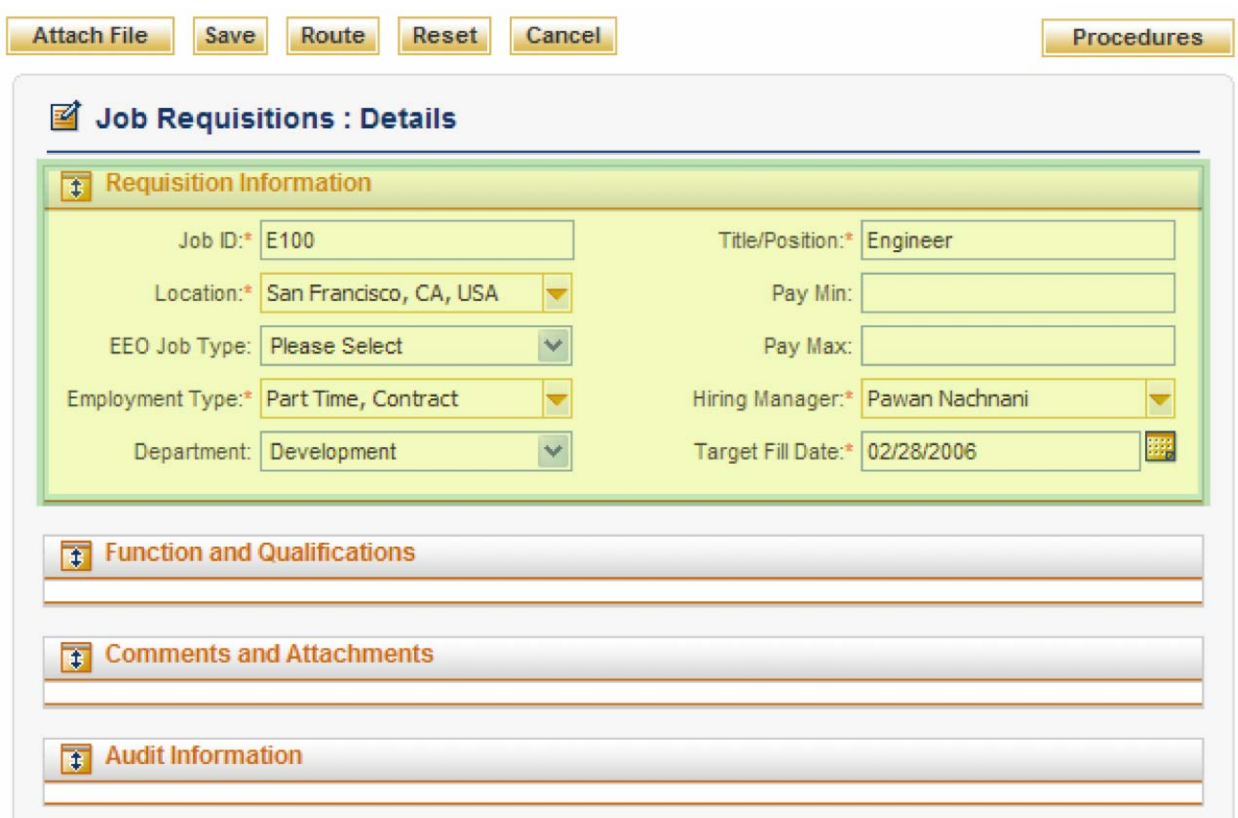
These routed objects have special requirements which are different from standard enterprise object – routed objects are treated as static documents which recipients review and can approve or reject. All of the actions associated with these routed EOs are tracked. When the initiator created and routed the record. When each recipient received the record, how long they took to review and act upon the information, and what action they took. All of the information including the routing path, who the record is routed to, and in what order, is important. Many of the parameters can be tightly controlled or made flexible depending on the needs of the process (the workflow enabled object).

TO CREATE AND NAME AN ENTERPRISE OBJECT, TO MAKE A WORKFLOW OBJECT

1. From the Manage Applications page, select **Enterprise Objects** (Application Developers and Administrators have permissions to access the Manage Applications page. They have an Admin link at the top of Nsite pages. From the Admin page, select Manage Applications & Lookups.)
2. Click the **Create New Enterprise Object** button
3. In the **Name** text box of **Enterprise Object Settings** pane of the Developer's Palette, enter a name for the enterprise object
4. To make the enterprise object a workflow enabled enterprise object, add a check to the **Workflow** check box.

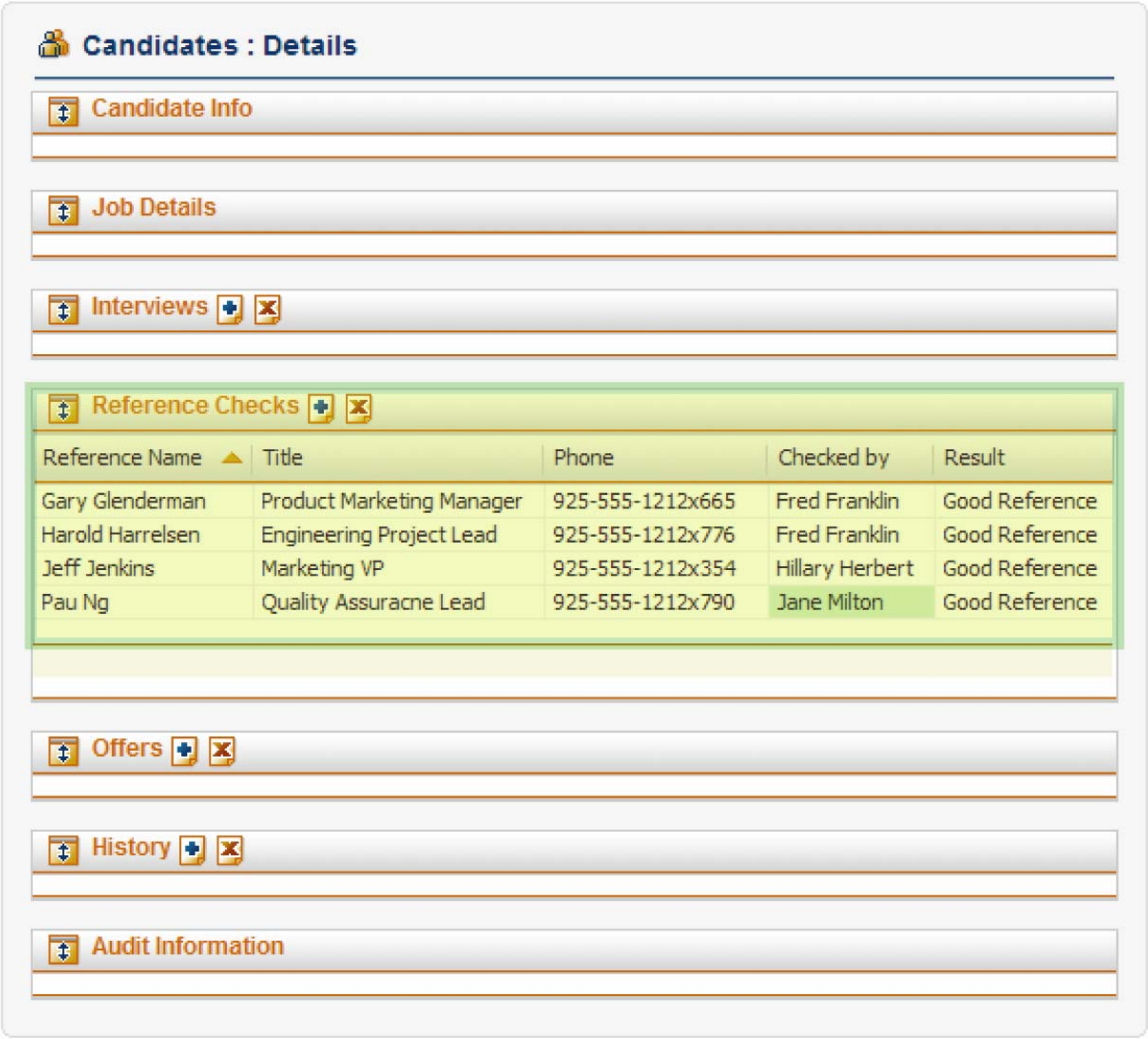
Areas and Controls, Tables and Columns

The full detail interface view is comprised of Areas and Tables. Areas have controls. Controls which are data fields which may include display formatting and input validation. Data inputs may be text boxes, text areas, and date input mechanisms, check boxes, radio buttons and attachment input mechanisms. Controls may be lookups, buttons, or links.



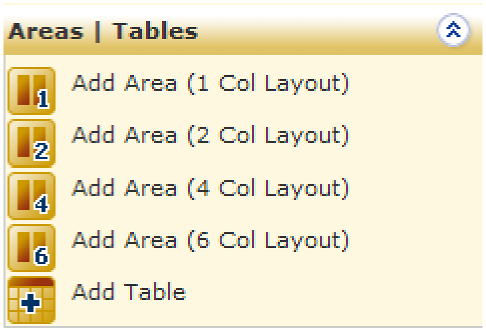
Controls within this view are created in the database and data bindings automatically provided.

Where controls in areas are a one per object addition to the record, tables allow the addition of multiple similar records. Tables have columns. The control defines the column. Each column is made up of identical cells. Each row adds a record.



Reference Name	Title	Phone	Checked by	Result
Gary Glenderman	Product Marketing Manager	925-555-1212x665	Fred Franklin	Good Reference
Harold Harrelsen	Engineering Project Lead	925-555-1212x776	Fred Franklin	Good Reference
Jeff Jenkins	Marketing VP	925-555-1212x354	Hillary Herbert	Good Reference
Pau Ng	Quality Assuracne Lead	925-555-1212x790	Jane Milton	Good Reference

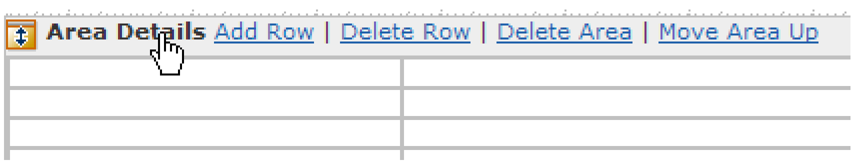
TO ADD AREAS AND TABLES



The Areas|Table pane of the Developer's Palette gives several options for Area Layouts

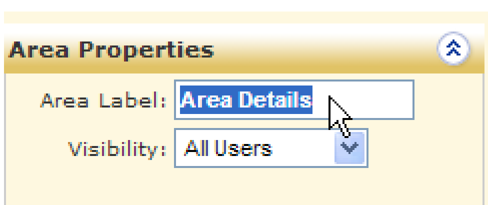
1 Open the **Areas|Tables** pane of the Developer's Palette

2 Double click the **Add Area** layout type icon or **the Add Table** icon



3 Select the Area|Table header by double clicking the name in the top line

4 Name the Area or Table by changing the text in the Area Label text box



5 You can delete an Area|Table or move or Area|Table by using the links in the header line for the Area|Table

6 You can add rows to an area by clicking the **Add Row** link. The row is added at the bottom of the area

7 You can delete rows by inserting the cursor to the row, then clicking the **Delete Row** link. The selected row is deleted

TO ADD AND MODIFY CONTROLS

1 From the **Controls** pane of the Developer's Palette, select a control and drag it and drop it in a cell from an area or table

2 To view or change the properties for a control, double click the control and the **Control Properties** pane of the Developer's Palette will display the properties for the control

3 Change the name for the control by altering the information in the **Name** text box for the control

TO DELETE CONTROLS

1 While holding the control key down, select the control

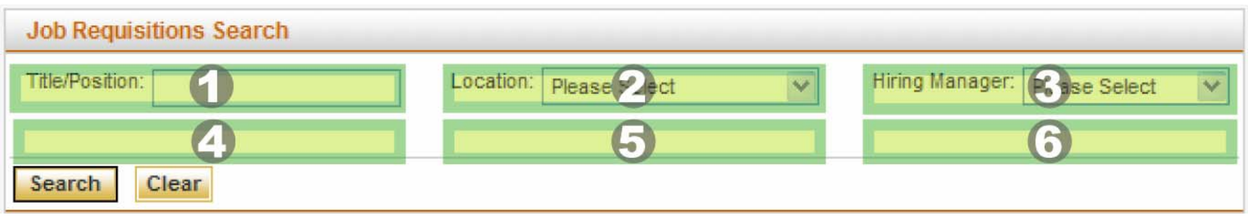
2 Click the delete key

TO DEFINE WHICH CONTROLS ARE REQUIRED FOR CREATING A RECORD (QUICK CREATE FIELDS)

1 Select the control

2 Add a check to the **Required** check box

TO DEFINE WHICH CONTROLS ARE USED FOR THE SEARCH FILTER FIELDS



1 Select the control

2 Near the bottom of the **Control Properties** pane, add a check to the **Filter Field** check box

3 The Search Filter pane of the Enterprise Object Home Page is defined as a three column layout. The label associated with the control and the control are assigned a number in the **Control Properties|Filter Index** text box. For the Job Requisition object the Location drop down has Filter Index, 2.

NOTE: If more controls are added, the position numbers move to the right, then down as shown above.

TO DEFINE WHICH CONTROLS ARE USED FOR THE LIST COLUMNS

The first column should be the identifying field for the object. The platform adds a link to the column data for easy access to the record.

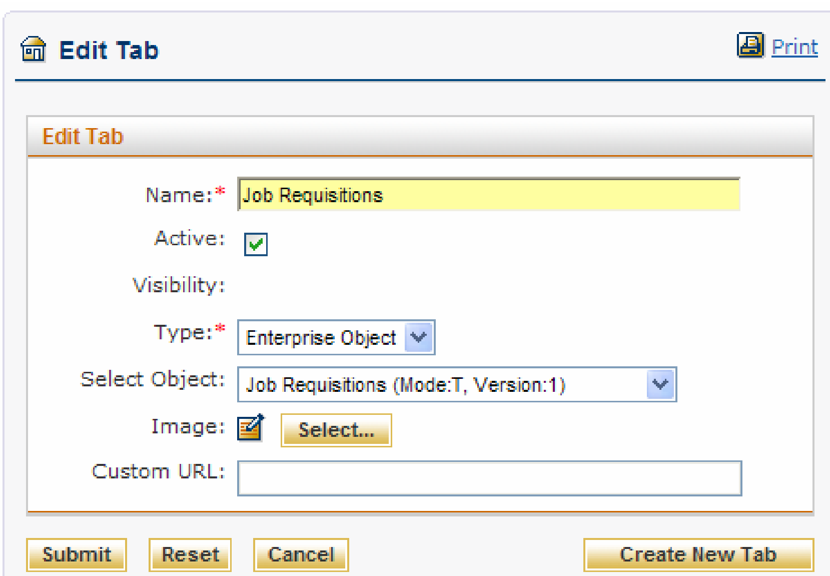
1. Select the control
2. Near the bottom of the **Control Properties** pane, add a check to the **Search Table** check box
3. The positioning of the columns for the list pane are from left to right. Add the appropriate number to the **Column Index** text box
4. If you want columns which are not of equal width, add a percentage in the **Column Width** text box. The width percentage of the columns should equal 100%

Creating Tabs and Associating Them with Enterprise Objects

Tabs are mainly a linkage mechanism. They provide a linkage to the interfaces of an enterprise object, or the means for bringing up a web page.

Creating a Tab and Associating it with an Enterprise Object

With tabs which provide linkage to enterprise objects you define the name for the tab, select the enterprise object type, then select the enterprise object.



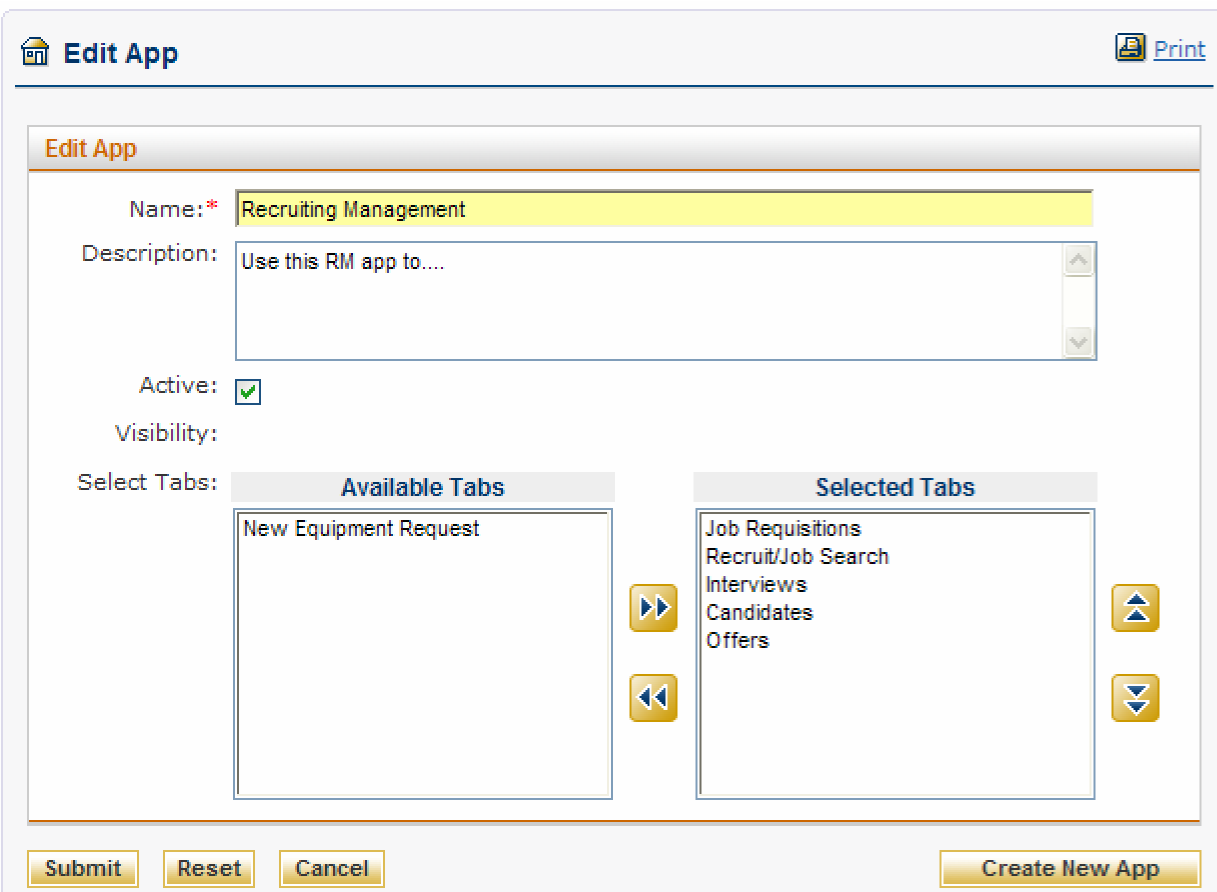
1. From the **Manage Applications** page, select **Tabs**
2. Click the **Create New Tab** button
3. Enter the name you wish for the tab in the **Name** text box
4. Add a check to the **Active** check box

5. From the **Type** drop down, select **Enterprise Object**
6. From the **Select Object** drop down, select the appropriate enterprise object
7. (optional) Add an image to the tab, by clicking the **Select** button, then selecting an image.

Creating a Tab and Associating it with a Web Page

1. From the **Manage Applications** page, select **Tabs**
2. Click the **Create New Tab** button
3. Enter the name you wish for the tab in the **Name** text box
4. Add a check to the **Active** check box
5. From the **Type** drop down, select **URL Link**
6. In the **Custom URL** text box, enter the complete address for the web page (it must have the http://, https:// as part of the web address)
7. (optional) Add an image to the tab, by clicking the **Select** button, then selecting an image.

Creating the Application and Associating Tabs with the Application



1. From the **Manage Applications** page, select **Applications**
2. Click the **Create New Application** button
3. Enter the name in the Name text box. This text will appear in the **Select Application** drop down at the top of each Nsite page
4. Give a description to the application
5. Add a check to the **Active** check box
6. From the **Available Tabs** on the left select the tabs for the application using the right arrow. To remove tabs, select the tab on the right and use the left arrow
7. Order the tabs by selecting the tab, then using the up and down arrows. The top tab will show on the left next to the Home tab

Set Application Privileges

One of the most difficult concepts to grasp with Nsite 6.0 applications is the access privileges to applications, tabs, enterprise objects, and records. Access is dependent not only on access to the application, tab, and enterprise object, but also by your organizational access to records which belong to a specific enterprise object.

To setup access privileges you must be an Nsite Administrator. Only Administrators can

- Create and Manage Roles
- Create and Manage Groups
- Manage the Organizational Structure
- Manage User Accounts

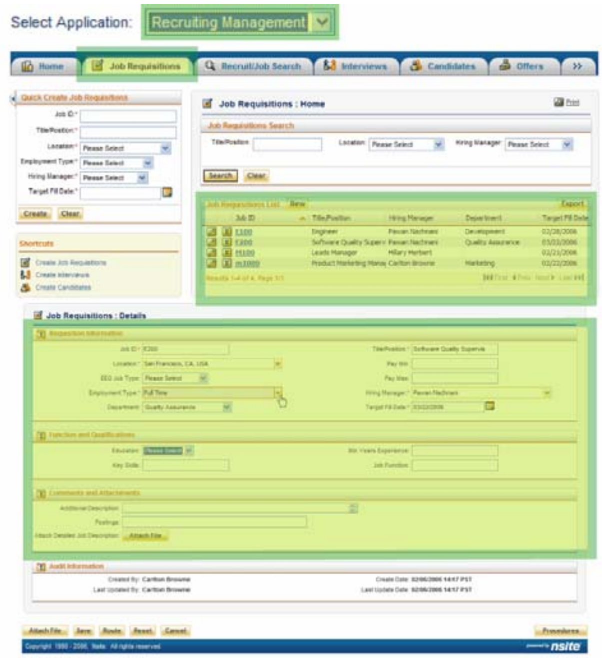
Access privileges are packaged through a mechanism known as roles. The role defines which applications will be displayed in your Select Applications menu, which tabs that represent web pages will be displayed in that applications tab structure, and which tabs which are linked to enterprise objects.

Access to applications and web page tabs is straightforward. You either can access them or not access them. With enterprise objects there are additional access issues to records — whether you can view records, edit records, delete records, or export records. These data issues are also controlled by your organizational access.

Organizational access defines which records you can see. Will the records be accessible (whether to view, edit, delete, or export) across the organization or will they only be accessible only to the user who created the record. There is a third option. Will the records be accessible to only members of the department which created them?

Must have access to application to access the tabs

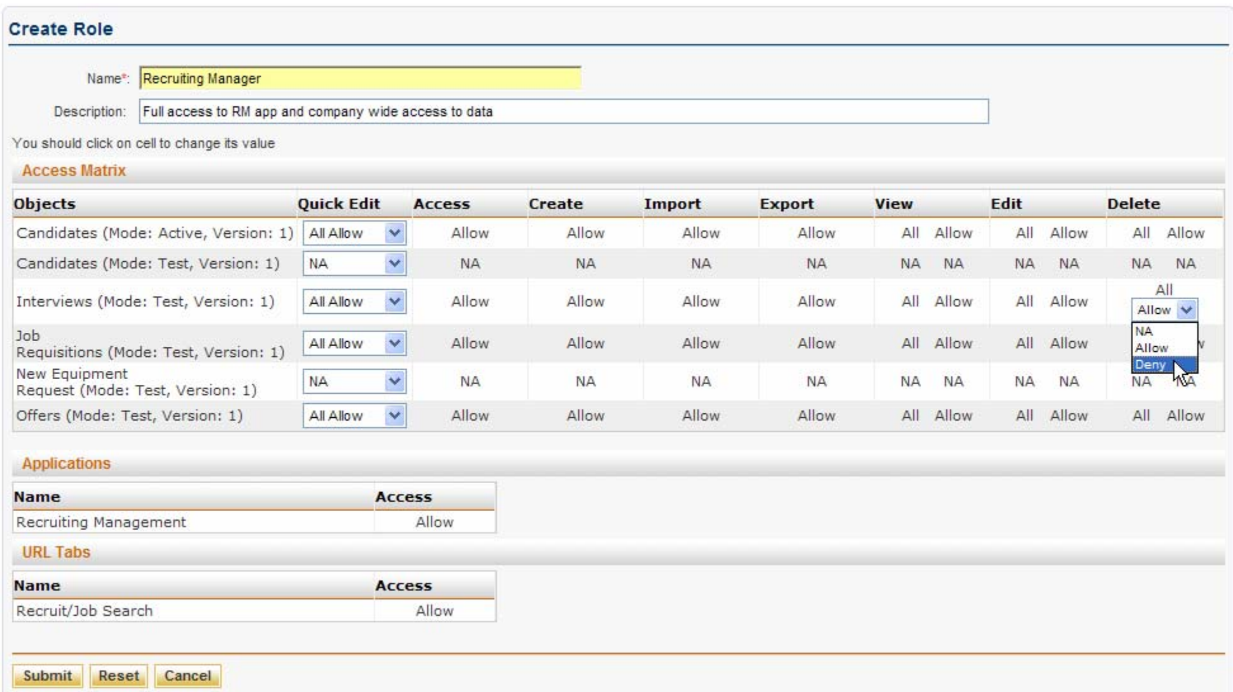
Must have access to tabs and have organizational data access to see and access data



Roles

Roles package the privileges. Privileges are not directly given to users. You cannot define Fred User1 to have read only access to the Job Requisition tab of the Recruiting Management application directly. However, you can define a role called Job Req Access which declares that the Job Requisition enterprise object tab is View access. Then you assign Fred User1 to the role.

Users can be assigned to many roles. If Fred User1 also belongs to a role which allows him to edit the Job Requisition object, then he can also edit the object. If a user is assigned to two or more roles, he will receive the greater permission.



TO CREATE A ROLE

You must be an administrator. Enterprise objects require you to define **Create**, **View**, **Edit**, and **Delete** access. You must select **Access** to the object first.

1. Click the **Admin** link at the top of the Nsite screen
2. From the **Role & Group Management** section, click the **Create Role** link
   a. Enter a name for the role in the **Name** text box
   b. Enter a description for the role in the **Description** text box
   c. Set access privileges to enterprise objects
   d. Set access privileges to **URL Tabs**
   e. Set access privileges to the application
3. Click the **Submit** button

TO ASSIGN USERS TO A ROLE

You must be an administrator. Some roles you will assign to only one user or a limited number of users. The Recruiting Manager role for the Recruiting Management application will be for a limited number of Human Resource representatives. All Managers, Supervisors, and Leads in the company can request new jobs to be created using the Job Requisition enterprise object, so we will have a group for these users.

1. Click the **Admin** link at the top of the Nsite screen
2. From the **Role & Group Management** section, click the **Manage Roles** link
3. Select the role
4. Click the **Assign** button next to **Users List**
5. In the **Users Assignment** screen, select **Users** from the left pane and move them by using the arrows to the **Selected Users** in the right pane
6. Click the **Submit** button

The users just select will have the privileges assigned to the selected role.

Groups

Groups are groups of users. Groups make it easier to control access privileges to large numbers of users. Groups can be assigned to roles just as users can.

TO CREATE A GROUP

You must be an administrator.

1. Click the **Admin** link at the top of the Nsite screen
2. From the **Role & Group Management** section, click the **Create Group** link
3. In the **Name** text box enter a name for the group
4. In the **Description** text box enter a description for the group

TO ASSIGN USERS TO A GROUP

1. Click the **Admin** link at the top of the Nsite screen

2 From the **Role & Group Management** section, click the **Manage Roles** link

3 Select the role

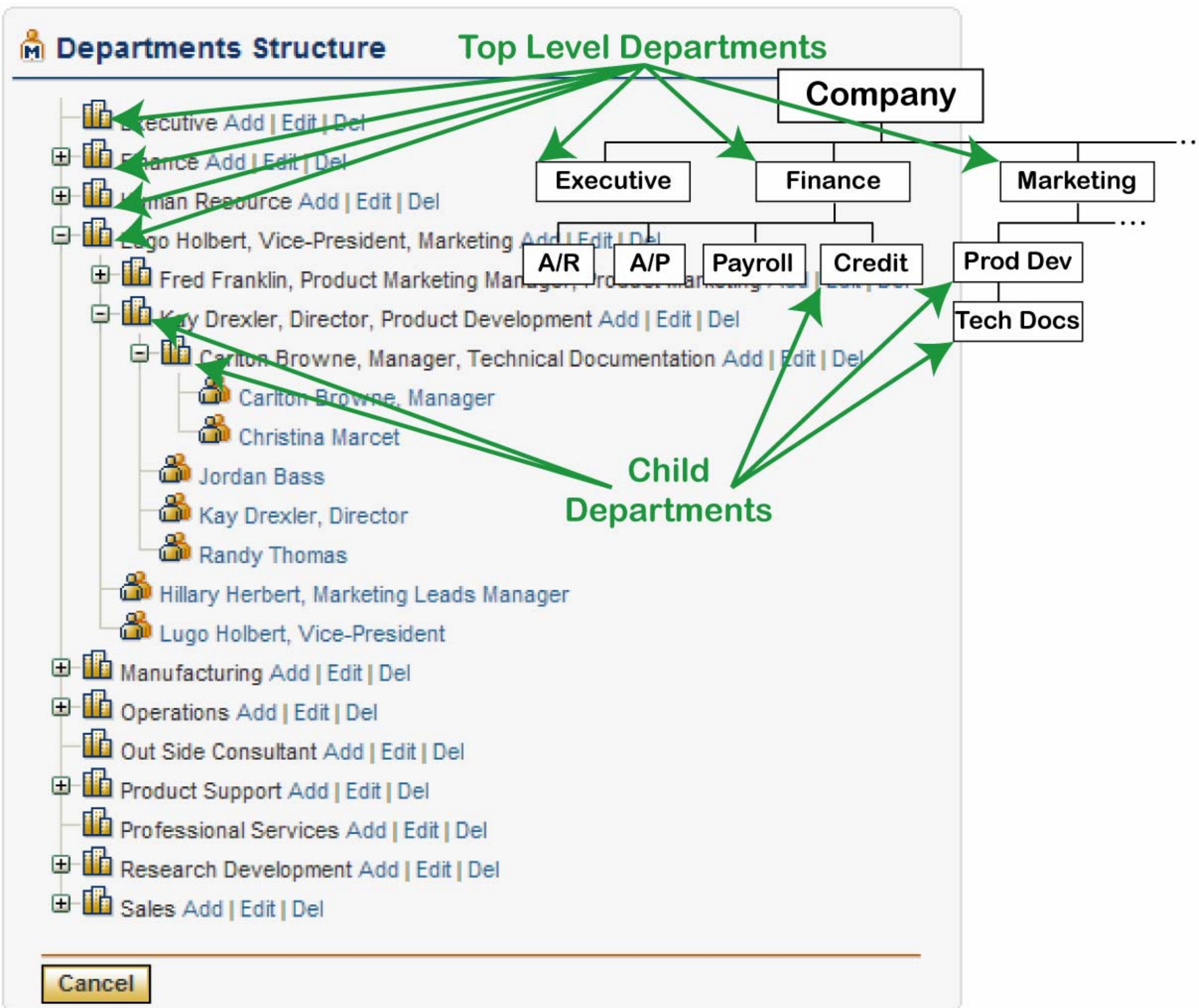
4 Click the **Assign** button next to **Groups List**

5 In the **Groups Assignment** screen, select **Groups** from the left pane and move them by using the arrows to the **Selected Groups** in the right pane

6 Click the **Submit** button

Organization Structure

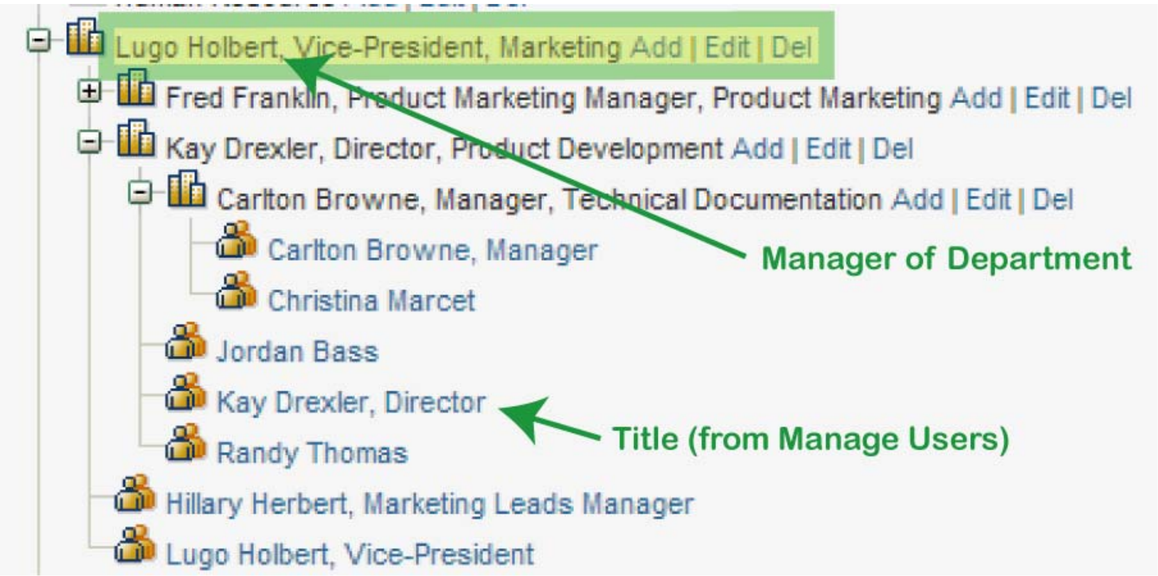
When a new user is added to your Nsite account, one question that must be answered is "to which department does the user belong?" This information is used when providing access to routing reports and to access enterprise object records.



Departments exist in a hierarchical structure. Top level departments are displayed as the first level in the **Departments Structure** screen. Child departments are any department which has a parent department.

Managers and Titles

The **Departments Structure** screen displays the managers of departments, as well as the user's title. Each department has what is designated the manager for the department. In actuality this person could be a vice-president, director, or any other title your organization uses. In this sense manager describes privileges for the organization structure as defined in Nsite. When a user is a manager he has report visibility privileges into the child departments of his department as well as his department. Access privileges for reporting for other users is set in the **Manage Users** screen.



When a manager is set for a department, Nsite displays

- the manager's name
- the manager's title
- the name of the department

Titles can be given to users and users associated with departments in the **Manage Users** screen.

TO CREATE AND EDIT DEPARTMENTS

Departments can be created in three ways: from the **Manage Settings** screen, when adding a new user, or from the **Departments Structure** screen.

TO CREATE A DEPARTMENT FROM THE DEPARTMENTS STRUCTURE SCREEN

You must be an administrator to create a department.

1. Click the **Admin** link above the tabs on any Nsite page
2. Click the **Organization Structure** link in the **Role & Group Management** section of the **Administration** screen
3. On an existing department, click the **Add** link.
4. (Option) To add a sub-department to the department selected, **Name** the department, but leave **the Reports** to drop down selection as is
5. (Option) To add a sub-department to another department, **Name** the department, and select the parent department using the **Reports to** drop down

6. (Option) To add a top level department, **Name** the department, and select **Please Select** in the **Reports to** drop down
7. Click the **Submit** button

TO CHANGE WHERE A DEPARTMENT EXISTS IN THE ORGANIZATIONAL STRUCTURE

You must be an administrator to alter the organization structure.

1. Click the **Admin** link above the tabs on any Nsite page
2. Click the **Organization Structure** link in the **Role & Group Management** section of the **Administration** screen
3. On the department you wish to move, click the **Edit** link.
4. (Option) To make the department a sub-department to another department select the parent department using the **Reports to** drop down
5. (Option) To make the department a top level department select **Please Select** in the **Reports to** drop down
6. Click the **Submit** button

TO ASSIGN A MANAGER TO A DEPARTMENT

You must be an administrator to define departments. The manager must already be a member of the department. Use the **Manage Users** screen to change a user to the department.

1. Click the **Admin** link above the tabs on any Nsite page
2. Click the **Organization Structure** link in the **Role & Group Management** section of the **Administration** screen
3. On the department you wish to designate a manager, click the **Edit** link.
4. From the **Manager** drop down, select a user
5. Click the **Submit** button

Refine and Test

Applications and tabs are either active or deactivated. To see these components whether the enterprise objects used are in test mode or deployed, the application or tab must be active. Enterprise objects are either in test mode or are deployed. Test mode means that the object can still be edited without changing versions.

Workflow objects can be routed and the accumulated routing data can be later purged, so it will not affect the users or company's performance once the workflow object is deployed and the routings are real, not merely test, routings.

Standard enterprise objects do not have a purge mechanism. Test data entered in standard enterprise objects can be deleted before giving full access to users. To control access to applications and standard enterprise objects use the roles and group access management feature.

While the enterprise object is in test mode changes can be made. Once an enterprise object is deployed, you cannot edit that version of the object. To edit an active version you have to copy the active version. It will become a new test version. You can then alter the test version.

To deploy the new version, you deactivate the old version, then activate the new version.

TO TEST ROUTE A WORKFLOW ENTERPRISE OBJECT

1. From the **Manage Enterprise Objects** screen, locate the workflow enterprise object
2. From the drop down menu in the **View** column for the workflow enterprise object, select **Edit View**
3. Fill out the workflow enterprise object
4. Click **Route**
5. Finish the routing as you would with a deployed application (routing registration, select and sort recipients)

TO PURGE A WORKFLOW ENTERPRISE OBJECT'S TEST ROUTINGS

1. From the **Manage Enterprise Objects** screen, locate the workflow enterprise object
2. From the drop down menu in the **Actions** column for the workflow enterprise object, select **Purge Test Routings**

Deploy and Use

Deploying applications is mainly a matter of giving target users access to the applications. Enterprise objects may be deployed immediately or a date set for their deployment.

TO DEPLOY AN APPLICATION

1. Activate all enterprise objects associated with the application
2. Give the target users access to the application and appropriate tabs and objects using the **Roles & Group Management** options from the **Administration** page. You must be an administrator to change the access privileges

TO DEPLOY ENTERPRISE OBJECTS

You must be an administrator or application developer to deploy enterprise objects.

1. From the **Manage Enterprise Objects** page locate the object to activate
2. From the **Actions** drop down menu for the object, select **Activate**. If the enterprise object already has an active version, that active version must be deactivated before the test version can be made active
3. Select a date for the object to become active. If you leave the selection as today's date, the object will be automatically activated

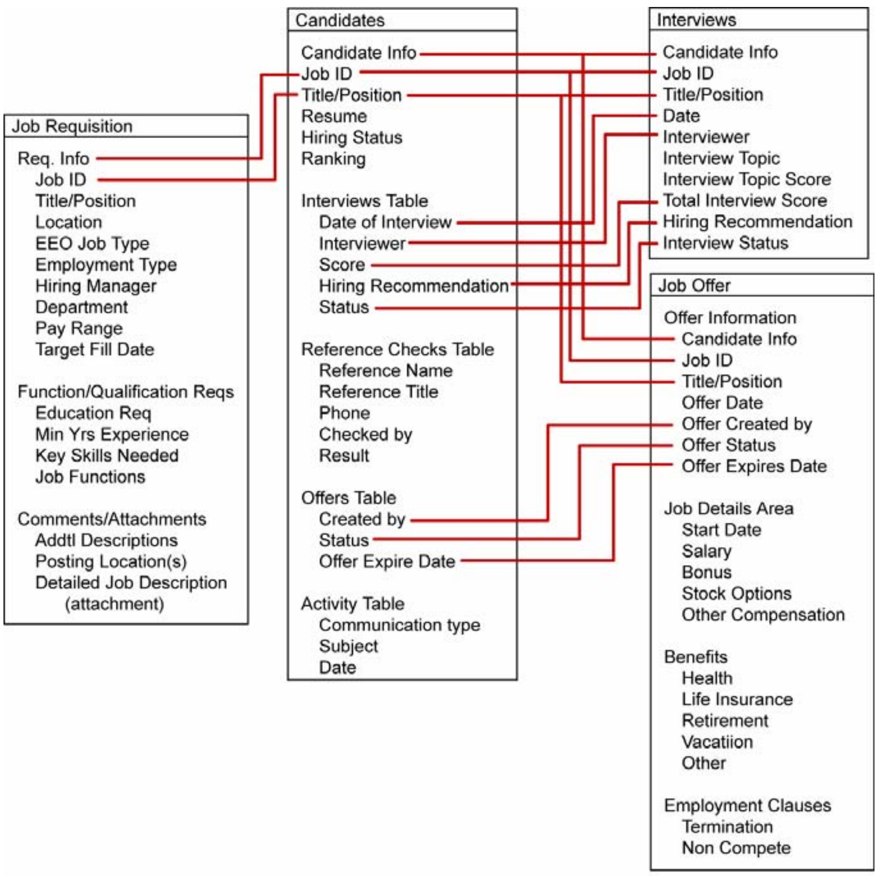
TO DEACTIVATE ENTERPRISE OBJECTS

You must be an administrator or application developer to deactivate enterprise objects.

1. From the **Manage Enterprise Objects** page locate the object to deactivate
2. From the **Actions** drop down menu for the object, select **Deactivate**

Appendix: Full Field Level Interdependencies for the Example Recruiting Management Application

The full mapping of the Recruiting Management application shows the mapping at the field level for each of the four objects.



Sketching the Field Level Data Interdependencies for the Enterprise Objects Used in the Recruiting Management Application.

About Nsite

Nsite is a leading Software as a Service (SaaS) company that provides customers and partners with a breakthrough AJAX enabled On Demand platform for customizing and building applications faster than ever before possible. Today over 7,000 users in 21 countries are accessing Nsite to customize, build and automate a wide variety of applications. Nsite is headquartered in Pleasanton, California. For more information, call 925-249-4100, or visit www.nsite.com.

> **End users are discovering to their delight that they can quickly build many of the applications they once could only buy from vendors at high prices.**
>
> *-- Denis Pombriant, Managing Principal, Beagle Research Group*

Program What You Can Do ...

... is limited only by your imagination

- Build entirely new enterprise applications in your browser with drag-and-drop and point-and-click ease
- Create enterprise business objects, tabs, relationships, workflow, integration, roles, dashboards and reports without any coding
- Replace spreadsheets and paper based processes for Quoting, Proposals, Contact Management, Expense Reports, Purchase Requests, Job Requisition, Performance Management, Timesheets, Project Management.... with robust applications you create in hours and days

nsite™ UNIVERSITY

7031 Koll Center Parkway, Suite 250 - Pleasanton, CA 94566
Tel. 925.249.4100 - email. info@nsite.com - www.nsite.com