



ProductDashboard™

Release Notes

Release 4.0

January, 2006



SofTech

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ProductDashboard 4.0 Release Notes

Introduction

These release notes describe the features included in this release of ProductDashboard as well important installation and usage notes.

Overview of ProductDashboard

ProductDashboard is NorthRidge Software’s Web portal integration into ProductCenter. The goal of this application is to provide the customer with Web access to ProductCenter that is personalized for each user based on their specific product information requirements.

This major release provides the following:

- Support for new ProductCenter 8.5 URL data type.
- Support for the ProductCenter Web Client “NewFileCase” feature.
- Support for the ProductCenter 8.5 viewable resource entries. These entries are identified as “site.admin.viewable.link_type” and “site.admin.viewable.filetypes”.

What's New

ProductDashboard 4.0 includes three new enhancements. The following section provides details of this release.

Enhancements

The following new features are included in this release.

Enhancement	Description
URL Data Type	The ProductCenter URL data type should be recognized by ProductDashboard forms.
New File Case	The “NewFileCase” option should be recognized by ProductDashboard.
Resource Entries	The viewing resource entries: “site.admin.viewable.link_type” and “site.admin.viewable.filetypes” should be recognized by ProductDashboard.

Bug Fixes

The following software defects were fixed in the prior 3.1 maintenance release.

Defect	Description
11960	Link image file references are incorrect.
11961	Email link compatibility support with PC Web Client.
11962	Bookmark links to network files are now properly supported.

Adding a User Defined Function

ProductDashboard now supports user defined Common Gateway Interface (CGI) integration. This capability permits a web site developer to define custom operations related to ProductCenter items, activities and processes within ProductDashboard instruments. To learn more, please contact the technical support staff at NorthRidge Software or SofTech for further details.

Dashboard, Panel, Instrument Access Control

ProductDashboard permits the ProductCenter administrator to control what ProductDashboard objects (dashboard, panel, instrument) can be edited. To change these settings, log into ProductDashboard as ‘cms’. Press the *Edit Dashboard* button in

the top right corner of the web page. You should see the following form:

Save Cancel Help

Dashboard Editor

Dashboard Settings	Add a New Panel	
Name: My ProductDashboard Stylesheet Theme: NorthRidge Software Refresh Rate: 10 minutes Default Panel: My Work Access Control: User Permissions	<input type="radio"/> Consumer Panel Choose this template if you want your new panel to provide advanced reporting capabilities and you do not need to add or modify the information created. <input type="radio"/> Author Panel Choose this template if you want your new panel to provide for business item and/or process additions or modifications. This template panel also allows for reporting. New Panel Name: <input style="width: 100%;" type="text"/>	
Current Panels		
Name	Operation	Type
My Work	Open Delete Edit	Author

Press the *User Permissions* button next to the **Access Control** label. You should see the following form:

Save Cancel Help

ProductDashboard Permissions Editor

Dashboard Global Permissions:

Type Name	Edit Dashboard	Edit Panel	Edit Instrument
Site	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Dashboard User Permissions:

Login Name	Edit Dashboard	Edit Panel	Edit Instrument
bob	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
cms	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
john	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
steve	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Permission Editor will recognize all ProductDashboard users who have previously logged into the application. You can change the permission settings by selecting the check boxes and pressing the *Save* button. Use the *Cancel* button to leave the form without changing it. Global Permissions assign a default access control setting for each ProductDashboard user. User Permissions override the Global Permissions settings on a per-user basis.

New Item Table Instrument Functions

This release of ProductDashboard introduces a number of new functions for item table instruments. To access them, create an *Item Table* instrument and press the *Edit* button of the instrument. You should see the new functions in the *Available Functions* section of the editor window.

Desktop Table Editor

Properties

Table Name:

Description:

Height:

Functions

<p>Available Functions</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 150px;"><ul style="list-style-type: none">Expand All LevelsExpand By FilterGet CopyLinks FilterRoute ItemShow RevisionsCheck InSubmitApproveDisapproveReturn UnmodifiedRemove one from Desktop</div> <p><input type="button" value="Add"/></p>	<p>Current functions</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 150px;"><ul style="list-style-type: none">View InfoView FileReportCheck Out</div> <p style="text-align: center;"><input type="button" value="Remove"/></p>
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Contact Information

The following section will identify the appropriate contact for your specific ProductDashboard questions.

Sales

SofTech, Inc. is the exclusive reseller of ProductDashboard. Please contact your sales representative about any issues related to product availability, pricing and packaging. You may also use the following points of contact:

Phone: 978-640-6222 x239

Email: info@softech.com

Technical Support

You may contact either SofTech or NorthRidge Software for ProductDashboard technical support.

SofTech:

Phone: 978-640-6222 x206

Email: productcenter@softech.com

NorthRidge Software:

Phone: 603-434-2525 x3

Email: support@nridge.com

Product Enhancements

Future product features are identified and prioritized based on customer requests. Contact NorthRidge Software using technical support contact information above to submit your enhancement requests.

If you wish to influence the product to greater degree, use the following contact information to join the Product Advisory Council (PAC).

Al Cole

603-434-2525 x1

acole@nridge.com

Installation Notes

Please refer to the System Requirements section of this document before installing and running ProductDashboard.

The details for the installation process are included in the ProductDashboard 4.0 Installation Guide.

System Requirements

ProductDashboard 4.0 has been tested and is fully supported on the platforms specified below. Contact NorthRidge Software customer support before attempting to run the application on a platform that is not included in the following list.

Server

Component	Platform	Revision
PDM	ProductCenter Web Client	8.5.x
Web Server	Apache	2.x
	Microsoft IIS	5.0, 6.0
Operating System	Sun Solaris	2.8
	MS Windows	NT, 2000
	HP HP-UX	11.0

Client

Component	Platform	Revision
Browser	Microsoft Internet Explorer	6.0
Operating System	MS Windows	NT, 2000, XP

Product Licensing

ProductDashboard requires a license for each “registered” user. A registered user is anyone that logs into and runs ProductDashboard at least once.

This release supports three classes of registered users, Consumer, Author or Concurrent, each with an associated per user cost. The class of user is determined by the level of access required by that individual. A Consumer has read-only access to ProductDashboard and cannot add or modify any ProductCenter items. An author has access to all end user functionality offered in ProductDashboard.

A concurrent license is essentially an Author license that is not tied to a specific named user.

Using ProductDashboard 4.0

Administration

Backup

Each user that accesses ProductDashboard has their account profile stored on the web server. You may want to periodically backup these files to preserve them in case of a system failure. This can be accomplished by archiving the following directories and files:

cgi-bin\ns\pd\usr

cgi-bin\ns\pd\cfg

htdocs\ns\pd\js\pd_customer.js

on the ProductDashboard web server.

Your custom style sheet

ProductDashboard is installed with three pre-defined stylesheets:

- NorthRidge Software (default)
- Blue Georgian
- ProductCenter

You can choose any one of these stylesheets in the Dashboard Editor to change the presentation (colors and fonts) of your personalized dashboard.

In addition, there is a selection for a “My Theme” stylesheet. This selection has no associated cascading style sheet (css) file and therefore will not display special fonts or colors. You can design your own personal presentation by creating a cascading style sheet named “pd_mytheme.css” and placing it in the *htdocs/ns/pd/css* of your Web Server.

Note: you may want to copy one of the three installed cascading style sheet files to use as a template.

Template panels and instruments

ProductDashboard delivers a set of templates for your default dashboard, default consumer and author panels as well as for each instrument. These templates are used to generate the definition for each of these components when they are first added by the user.

The installed templates are very generic because they are based on a newly installed database. You can have your default templates

specialized for your environment by contacting NorthRidge Software customer support.

Displaying your company logo

You can change the logo that is displayed in the dashboard header by replacing the *dashboard_logo.gif* file with a gif file of your own. The file is located under the `htdocs/ns/pd/images/customer` folder of the ProductDashboard web server. To replace the image, rename the image you would like to use to *dashboard_logo.gif* and place it in the folder specified. For best results, the gif image should be approximately 151 pixels wide by 46 pixels high.

User Setup

In order to access the login page of the ProductDashboard, each user will need to have access to one of the following URLs:

<http://webserver/cgi-bin/ns/pd/pd.cgi>

<http://webserver/ns/pd/login.html>

Where “*webserver*” is the host system located somewhere on your intranet. This hyperlink can be bookmarked by each individual user.

Once a user has successfully logged in, the application will maintain his/her ProductDashboard profile.

Usage Notes

Closing the browser window

Using the Close icon (x) in the browser to exit ProductDashboard will not immediately log the user out of the application. This method of exit will maintain the application’s session information on the Web Server so that if the user logs in again, ProductCenter will use the previous session’s cache, such as the Desktop list.

The recommended method for exiting ProductDashboard is to use the Logout button in the top right hand corner of the application.