



# Product **Dashboard**<sup>™</sup>

## *Installation Guide*

*Release 4.0*

*January, 2006*



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# CONTENTS

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Introduction.....	4
Planning Your Installation .....	4
License File.....	4
Web Server Location .....	5
Disk Space .....	5
Backup .....	5
Performance .....	6
Web Server Platform Considerations.....	6
Installing ProductDashboard.....	8
Windows Installation .....	8
UNIX Installation.....	14
ProductDashboard License .....	16
Launching ProductDashboard.....	16

# ProductDashboard 4.0 Installation

## Introduction

This document explains how to install and configure ProductDashboard. Please take the time to read through this document in its entirety before performing the installation. This will ensure that you fully understand the requirements and expected results.

If you require assistance to complete the installation, contact either SofTech or NorthRidge Software:

SofTech:

Phone: 978-640-6222 x206

Email: productcenter@softech.com

NorthRidge Software:

Phone: 603-434-2525 x3

Email: support@nridge.com

## Planning Your Installation

The following requirements for installing ProductDashboard must be considered before beginning the installation. This document does not identify the platform support matrix for ProductDashboard. Please refer to the *ProductDashboard Release Notes* for platform support details.

## License File

ProductDashboard requires an electronic license file to be installed before you can log into the application. Please contact SofTech technical support to secure a valid license file before installing ProductDashboard.

Phone: 978-640-6222 x206

Email: productcenter@softech.com

## **Web Server Location**

ProductDashboard is a web portal solution that is directly integrated with ProductCenter. Therefore, ProductCenter must be installed and operational before you begin the ProductDashboard installation. More specifically, you must have ProductCenter Web Client installed and operational on a supported web server.

If you are not currently using the Web Client, you will still need to install it and test all the basic functions before installing ProductDashboard. This will help ensure a successful installation of ProductDashboard.

Throughout this document we use the following conventions to refer to the two primary installation directories.

**<cgi-home>** This is the cgi-bin directory that exists on the host web server. For example, the default **<cgi-home>** for an Apache web server is C:\Program Files\Apache Group\Apache2\cgi-bin.

**<htdocs-home>** This is the htdocs directory that exists on the host web server. For example, the default **<htdocs-home>** for an Apache web server is C:\Program Files\Apache Group\Apache2\htdocs.

The location of the ProductDashboard is required to be on the same web server as ProductCenter Web Client. Therefore, all references to **<cgi-home>** and **<htdocs-home>** will imply the cgi-bin and htdocs directories where ProductCenter Web Client resides.

## **Disk Space**

The space required to install ProductDashboard is relatively small (about 5 MB) and should not be a planning concern. In addition, information will be stored on the web server for each user that has a ProductDashboard account. Allocate approximately 150 KB on the web server for every user.

## **Backup**

If this is not the first installation of ProductDashboard on this server, then you should backup the following files before installing this release.

**<htdocs-home>** | ns\pd\images\customer\dashboard\_logo.gif

**<htdocs-home>** | ns\pd\js\pd\_customer.js

**<cgibin-home>** | ns\pd\cfg\pd.cfg

**<cgibin-home>** | ns\pd\cfg\pd\_functions.cfg

Otherwise, these files will be overwritten by the application. After the installation is complete, you can overwrite these files with your site specific ones.

## **Performance**

NorthRidge Software has made application performance a design requirement for ProductDashboard. Installation decisions can also be made to optimize performance for your particular implementation. Consider installing a web server on a separate machine if you expect a large user base for the application.

This is especially true if you have the ProductCenter server, Oracle server, Web server and Vault server all installed and running from the same server machine.

## **Web Server Platform Considerations**

This release of ProductDashboard supports both Apache and IIS web server platforms.

### **Apache**

Installing ProductDashboard on an Apache web server is simply a matter of targeting the `cgi-bin` and `htdocs` directories to be the same as the `cgi-bin` and `htdocs` directories for the ProductCenter Web Client. This configuration is part of the standard installation procedure (see below)

### **IIS**

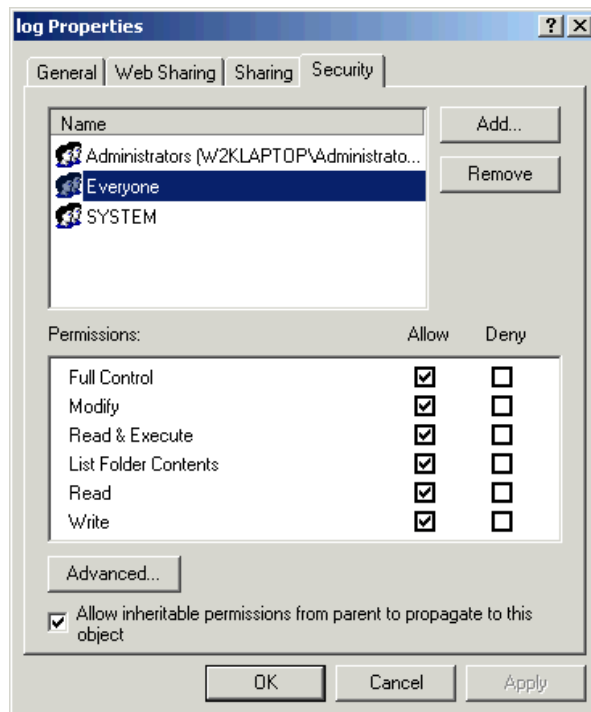
You need to pay specific attention to configuring an IIS web server to support a ProductDashboard installation. Follow these configuration instructions before and after the ProductDashboard installation, where `<IIS-home>` is the full path to your `\inetpub\wwwroot` folder on your web server host machine.

#### Previous to Installation

1. If not already defined, create a ***cgi-bin*** virtual directory that points to `<IIS-home>\cgi-bin`.
2. Give that folder a Read access permissions and Execute application permissions.
3. If not already defined, create an `<IIS-home>\htdocs` directory (you need not create a virtual directory that point to it).
4. Install ProductDashboard using the two folders described above as the `<cgi-home>` and `<htdocs-home>` target folders.

#### After Installation

1. Create an *ns* virtual directory below the *cgi* virtual directory that points to *<IIS-home>|cgi-bin|ns*.
2. Give that folder a Read access permissions and Scripts application permissions.
3. Create a *pd* virtual directory below the *cgi/ns* virtual directory that points to *<IIS-home>|cgi-bin|ns|pd*.
4. Give that folder a Read access permissions and Execute application permissions.
5. Create an *ns* virtual directory below the *<Home>* virtual directory that points to *<IIS-home>|htdocs|ns*.
6. Give that folder a Read access permissions and Scripts application permissions.
7. Navigate to the *<IIS-home>|cgi-bin|ns|pd* directory and open the properties for the *log* folder. Select the Security tab to display the following dialog:



Set permissions for the Everyone group to Full Control. Repeat these steps for the *usr*, *cfg* and *out* folders as well.

## Installing ProductDashboard

### Windows Installation

This section explains the procedure for installing the ProductDashboard application on a Windows host machine. The installation simply copies a set of files to the *cgi-bin* and *htdocs* directories of your ProductCenter Web Client host.

Note: If this is not the first installation of ProductDashboard on this server, you must uninstall the previous version of ProductDashboard before installing this release. Use the Add/Remove Programs feature to uninstall the application.

1. Log into the ProductCenter Web Client host machine as administrator or as another user with administrative privileges.
2. Insert the ProductDashboard CD-ROM in the CD drive. The Setup program should start automatically, and after a few seconds you should see the main installation windows shown below. If not, manually run the program `\setup.exe` on the CDROM.
3. The first window displays the product and version you will be installing. Cancel the install if the image you see does not coincide with Figure 1.

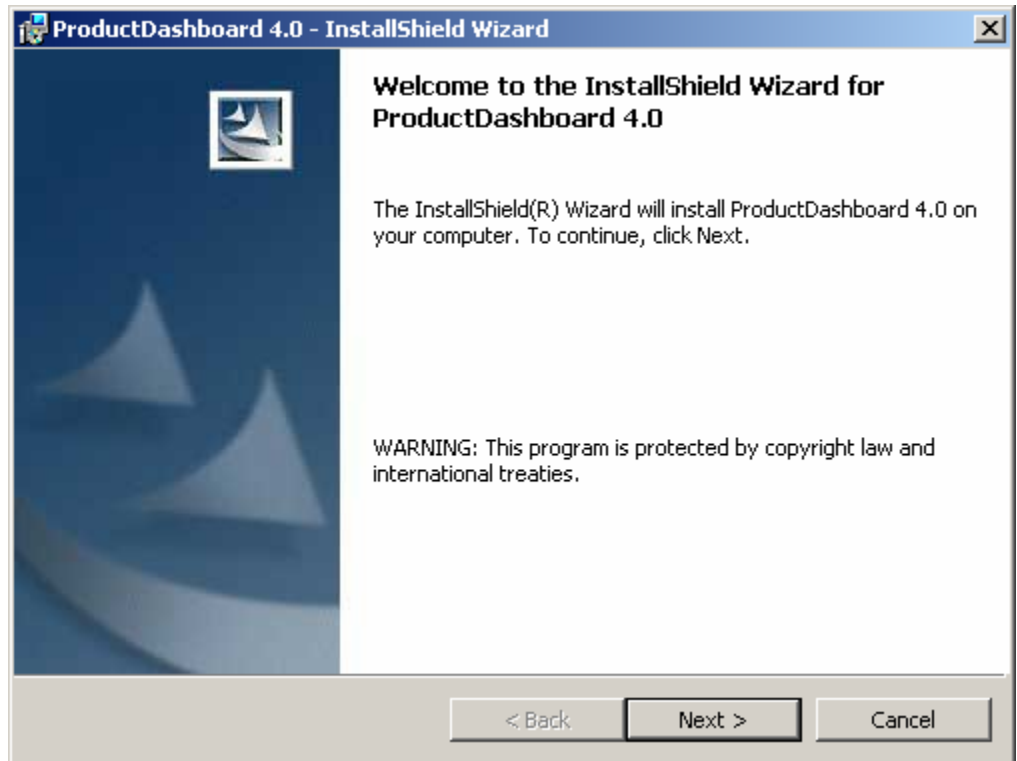


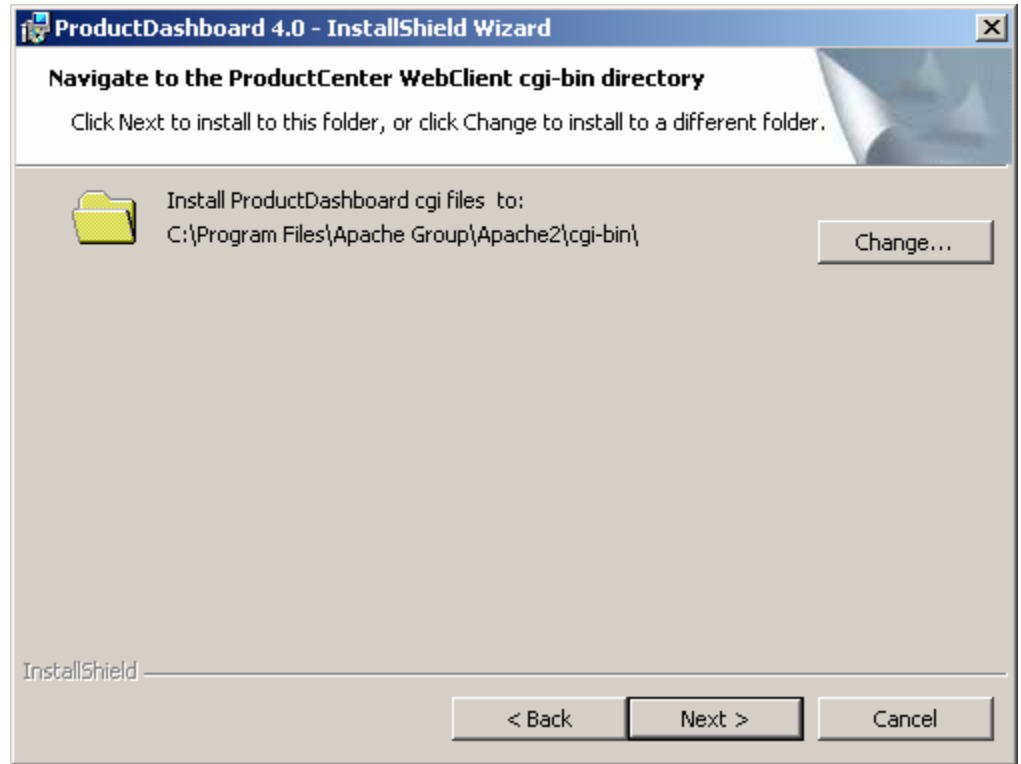
Figure 1: Product information window

4. If the image you see coincides with Figure 1, click **Next**. Otherwise, cancel the installation and call NorthRidge Software support.
5. Read the software license agreement that appears next. If you accept the terms, click the **I accept the terms in the license agreement** radio button and then click **Next** to proceed with the installation.



**Figure 2: License Agreement**

6. The next window (Figure 3) proposes a ProductDashboard installation location for the files that are to be placed in the cgi-bin folder of your web server.

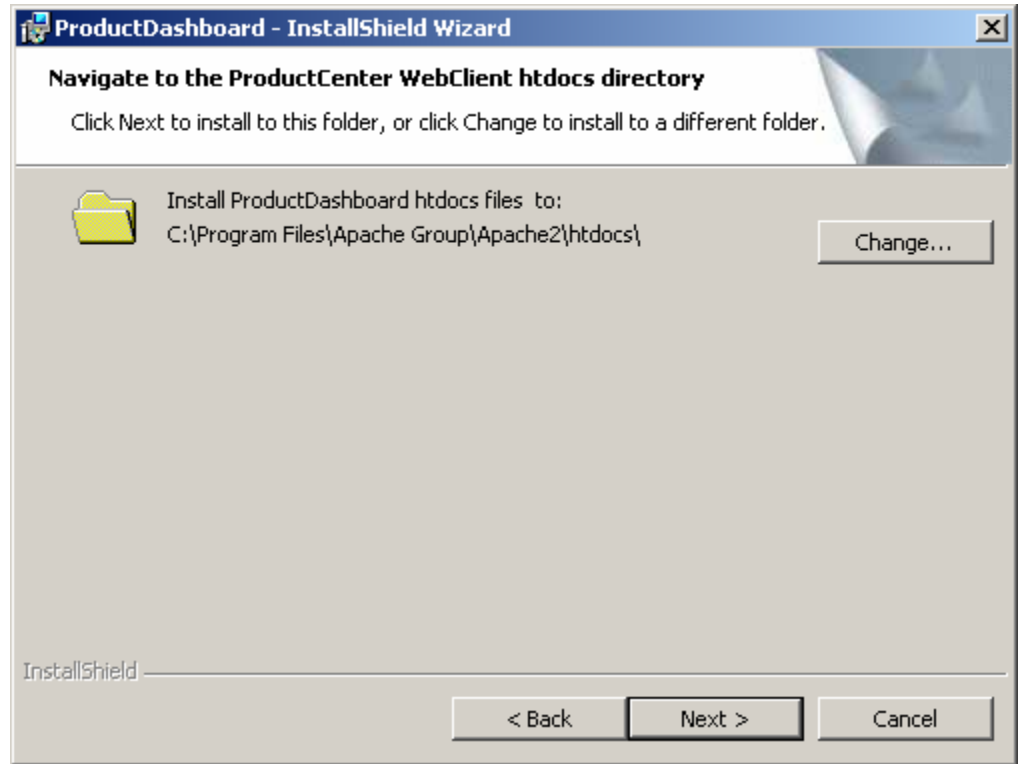


**Figure 3: Specifying the location of cgi-bin**

This folder must be the same as the folder in which you installed the ProductCenter WebClient cgi-bin files. Click **Change...** to browse to the cgi-bin folder of your web server.

Click the **Next** button after choosing the cgi directory to proceed to the next step.

7. The next window (Figure 5) proposes a ProductDashboard installation location for the files that are to be placed in the htdocs folder of your web server.

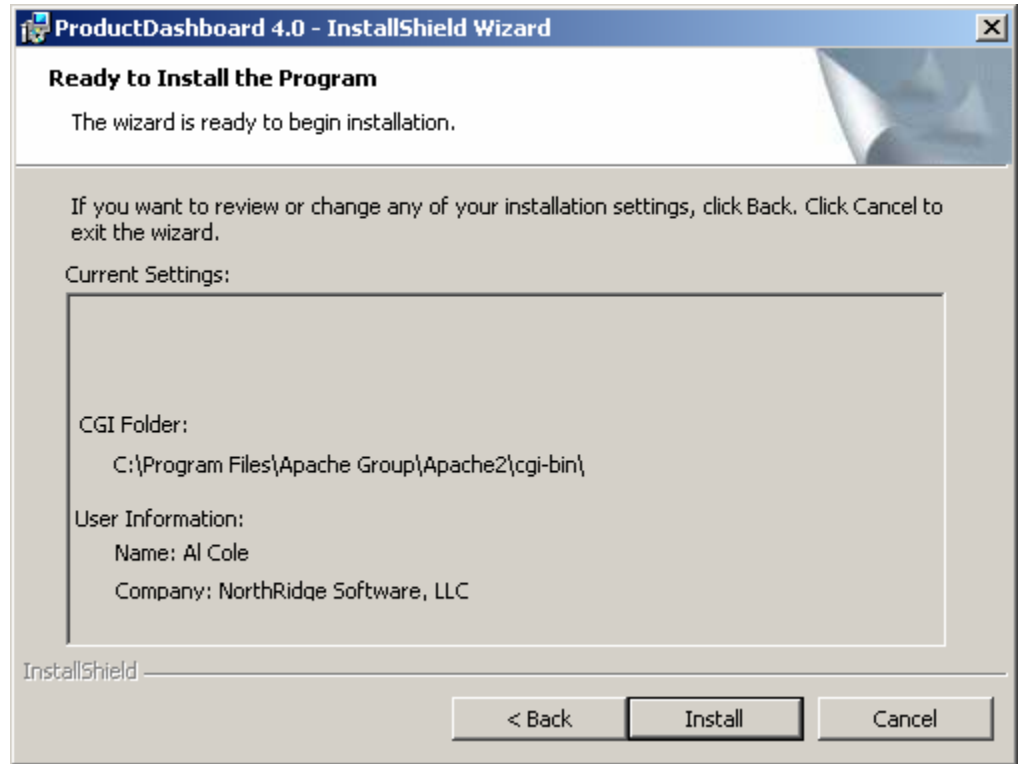


**Figure 4: Specifying the location of htdocs**

This folder must be the same as the folder in which you installed the ProductCenter WebClient htdocs files. Click **Change...** to browse to the htdocs folder of your web server.

Click the **Next** button after choosing the htdocs directory to proceed to the next step.

8. You have now provided all the information required to install ProductDashboard. The next window (Figure 5) summarizes your input.



**Figure 5 – Input Summary**

Click the **Install** button if you are satisfied with your inputs.

9. The installation program will run for a few minutes and then will display the following message upon successful completion (Figure 6 and 7).

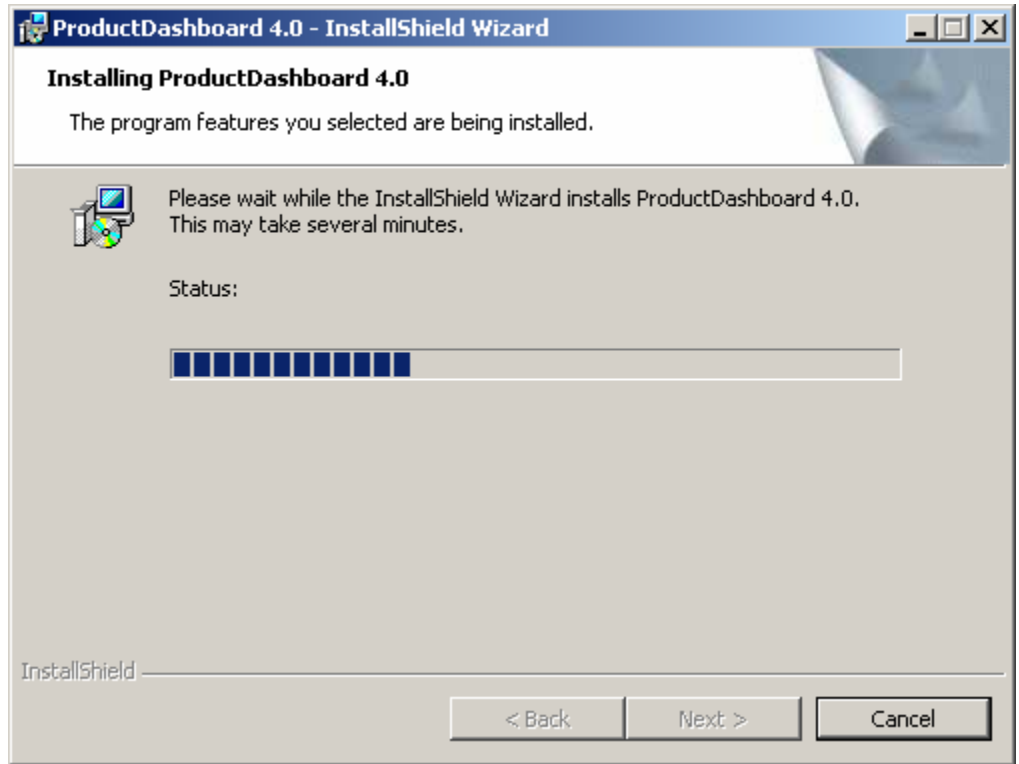


Figure 6 – Progress Indicator

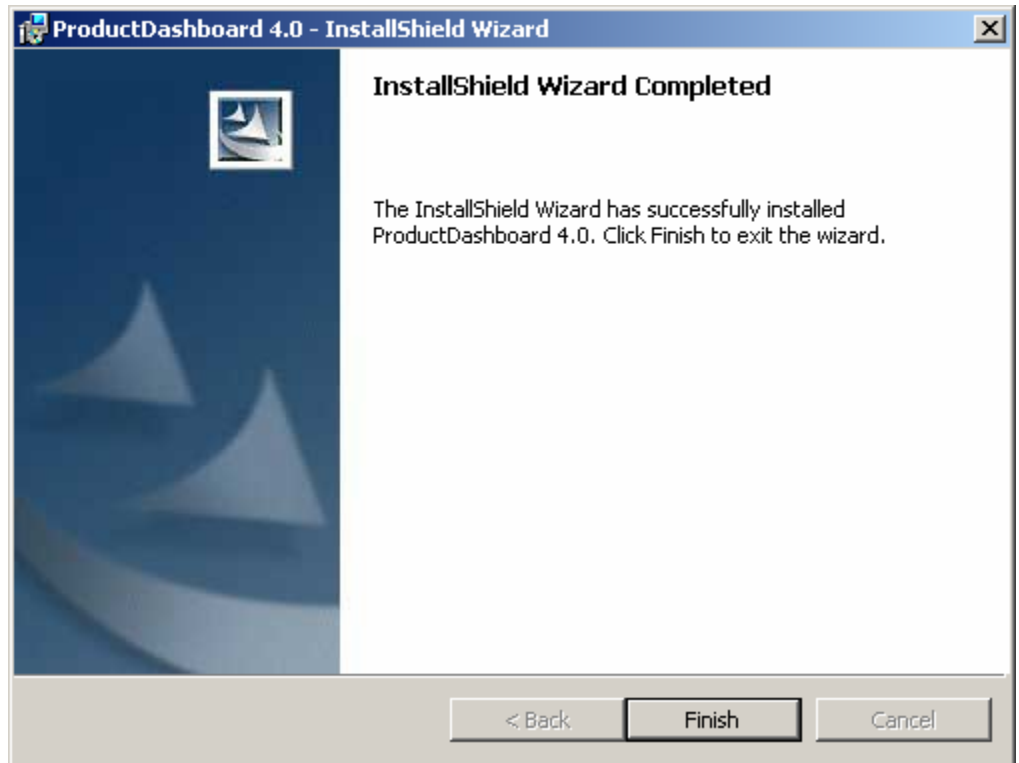


Figure 7 – Completion Dialog

## **UNIX Installation**

Follow these steps to install ProductDashboard on your UNIX host.

1. Login as the user that owns the cgi-bin and htdocs directories on your web server.
2. Change to the directory containing the installation script.

```
cd /cdrom/productdashboard
```

3. Run the **uinstall.csh** program.

```
./uinstall.csh
```

The install script will display the following information.

*NorthRidge Software, LLC (www.nridge.com) - UNIX Installation Script*

*This installation script will install ProductDashboard – 4.0.*

*This product requires that ProductCenter Release 8.5.0 or later be installed prior to delivering this software.*

*Do you wish to continue [y/n]?*

4. Enter “y” to continue with the installation. The install script will display the license agreement one page at a time. Select the space bar to scroll the license agreement one page at a time.

At the end of the agreement, you will be prompted to confirm your acceptance.

*Do you accept the license agreement terms [y/n]?*

5. Enter “y” to confirm your acceptance and proceed.  
The install script will prompt you for the cgi-bin and htdocs directories.

*Enter the cgi-bin directory of the web server:*

*Enter htdocs directory of the web server:*

6. Enter the full path to the directories on your web server.  
The install will ask you to confirm your selections.

*The install directories are set to:*

*Web server cgi-bin: /space/apps/apache/cgi-bin*

*Web server htdocs: /space/apps/apache/htdocs*

*OK to continue ? [y, n]:*

7. Enter “y” to continue.

The install script will prompt you to select the platform.

*Please enter identify your installation platform below.*

*1 - Solaris 2.8*

*2 - HP/UX 11.0*

*x - Exit the installation script.*

*Please enter in your selection:*

8. Enter “1” if you are installing on Solaris or “2” if you are installing on HP/UX. Enter “x” to exit the installation script.  
The script will display the location of the files being extracted:

*Extracting Solaris release kit.*

You will be given the opportunity to install either of the platforms until you enter “x” to exit the install script.

## ProductDashboard License

You must install a valid ProductDashboard license in order to log in to the application. You can secure a valid license file by contacting SofTech technical support (refer to Planning Your Installation above).

The ProductDashboard license file is named *pdlicense.xml*. Copy this file to the `<cgi-home>\ns\pd` folder of your ProductDashboard installation. Do not make any changes to the contents of this file. Even the smallest modification will invalidate it, thus rendering ProductDashboard inaccessible.

## Launching ProductDashboard

ProductDashboard can be launched using one of the following URLs:

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

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

ProductDashboard should respond with a web page similar to the one shown below..

