



# ProductDashboard™

## ***Release Notes***

*Release 4.3.0*

*February, 2008*



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# ProductDashboard 4.3 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 maintenance release provides the following:

- ProductCenter 8.6.1 support.
- User interface enhancements.
- User-defined instruments.
- Maximum query item threshold preference value support.
- Item title support in Workflow instruments.
- SQL Server 2005 support.
- Internet Explorer 7.0 support.
- General maintenance fixes.

## What's New

ProductDashboard 4.3 includes one new enhancement. The following section provides details of this release.

### Enhancements

The following new features are included in this release.

Enhancement	Description
ProductCenter 8.6.1 Release	ProductCenter 8.6.1 is now supported.
Graphical User Interface	The graphical layout has been updated with new images.
User-defined Instruments	User-defined instruments can be registered and selected via the panel editors.
Query Item Threshold	The maximum query item threshold value is now honored.
Item Title Attribute	The item title attribute is now available from workflow instruments.
SQL Server 2005	Microsoft SQL Server 2005 is now supported.
Internet Explorer 7.0	Microsoft Internet Explorer 7.0 is now supported.

### Bug Fixes

The following software defects were fixed in this maintenance release.

Defect	Description
11973	Expand by Links Filter Window now displays column information correctly.

### Adding a User Defined Instruments & Function

ProductDashboard now supports user defined instruments and custom functions. The custom functions use the Common Gateway Interface (CGI) for feature 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’ and 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						
<b>Name:</b> <input type="text" value="My ProductDashboard"/> <b>Stylesheet Theme:</b> <input type="text" value="NorthRidge Software"/> <b>Refresh Rate:</b> <input type="text" value="10 minutes"/> <b>Default Panel:</b> <input type="text" value="My Work"/> <b>Access Control:</b> <input type="text" value="User Permissions"/>	<input type="radio"/> <b>Consumer Panel</b> 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"/> <b>Author Panel</b> 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. <b>New Panel Name:</b> <input type="text"/>						
<div style="background-color: #800000; color: white; text-align: center; padding: 2px;">Current Panels</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #d3d3d3;"> <th style="width: 30%;">Name</th> <th style="width: 20%;">Operation</th> <th style="width: 50%;">Type</th> </tr> </thead> <tbody> <tr> <td>My Work</td> <td style="text-align: center;"><a href="#">Open</a> Delete <a href="#">Edit</a></td> <td>Author</td> </tr> </tbody> </table>		Name	Operation	Type	My Work	<a href="#">Open</a> Delete <a href="#">Edit</a>	Author
Name	Operation	Type					
My Work	<a href="#">Open</a> Delete <a href="#">Edit</a>	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

Recent releases of ProductDashboard introduced 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.

The screenshot displays the 'Desktop Table Editor' interface, which is divided into two main sections: 'Properties' and 'Functions'.

**Properties Section:**

- Table Name:** A text input field containing 'My Desktop'.
- Description:** A text area with a vertical scrollbar.
- Height:** A text input field containing '200'.

**Functions Section:**

- Available Functions:** A list box containing the following items: Expand All Levels, Expand By Filter, Get Copy, Links Filter, Route Item, Show Revisions, Check In, Submit, Approve, Disapprove, Return Unmodified, and Remove one from Desktop. Below the list is an 'Add' button.
- Current functions:** A list box containing the following items: View Info, View File, Report, and Check Out. Below the list is a 'Remove' button.
- Navigation:** Two arrow buttons (up and down) are positioned between the 'Available Functions' and 'Current functions' list boxes to facilitate moving items between them.

## Known Issues

ProductDashboard cannot process object names that have one of the following characters in them: **&**, **<**, **>**, **'** (single quote) and **"** (double quote). The underlying XML parser and style sheet processing engines fail to handle these special characters properly while generating the ProductDashboard web pages. Therefore, you should avoid using these characters in ProductCenter and ProductDashboard.

A future release of ProductDashboard will address these limitations by introducing a new layout storage repository and presentation engine. Until then, please avoid using these characters.

## **Contact Information**

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

### ***Technical Support***

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

SofTech:

Phone: (978) 458-3420 x503

Email: support@softech.com

NorthRidge Software:

Phone: (603) 890-3223 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

603-890-3223 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 4.2 Installation Guide.

## System Requirements

ProductDashboard 4.2 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	8.6.1
Web Server	Apache	2.x
	Microsoft IIS	5.0, 6.0
Operating System	Sun Solaris	2.8
	MS Windows	2000, 2003
	HP HP-UX	11.0

### Client

Component	Platform	Revision
Browser	Microsoft Internet Explorer	6.0, 7.0
Operating System	MS Windows	2000, XP, 2003

## 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 4.3

### **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* files 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.