Dashboard Technical Specifications

Contents

- 1 Introduction
  - 1.1 Use Cases
  - 1.2 User Communities
  - 1.3 What is the Dolcera Dashboard?
  - 1.4 Workflow
- 2 Deployment Architecture
- 3 Hardware Requirements
  - 3.1 Web Application Server
  - 3.2 Database Server
  - 3.3 Network
  - 3.4 Client Device
- 4 Software Requirements
  - 4.1 Web Application Server
  - 4.2 Database Server
  - 4.3 Client
- 5 Installation and Setup
  - 5.1 Hardware Installation
  - 5.2 Software Installation
    - 5.2.1 Database Server
    - 5.2.2 Web Application Server
  - 5.3 Setting up the Environment
  - 5.4 Best Practices
    - 5.4.1 Server Setup
    - 5.4.2 User Management

Introduction

The Dolcera Dashboard is a web application for managing and organizing patents, product information, and scientific literature. This application is used for a variety of purposes including patent review/clearance, and by different enterprise users including attorneys, licensing professionals, engineers, and executives.

Use Cases

The typical use cases for the Dolcera Dashboard are as follows:

1. Freedom-to-practice or clearance search
2. Patent portfolio analysis
3. Competitive intelligence
4. Patent landscaping
5. Patent-to-product mapping
6. Patent-to-standard mapping

User Communities

The typical users of the Dolcera Dashboard include:

1. Patent attorneys
2. Patent managers
3. Patent searchers
4. Engineers, scientists and inventors
5. Licensing and business development professionals
6. Senior executives

What is the Dolcera Dashboard?

The Dolcera Dashboard is an interactive web application used to:

1. Organize large quantities of patent, scientific and product literature
2. Manage patent review workflows
3. Assist in collaboration with colleagues and partners around the world
4. Help technology teams, patent counsels, and key decision makers in monitoring the competitive landscaping and finding key partners

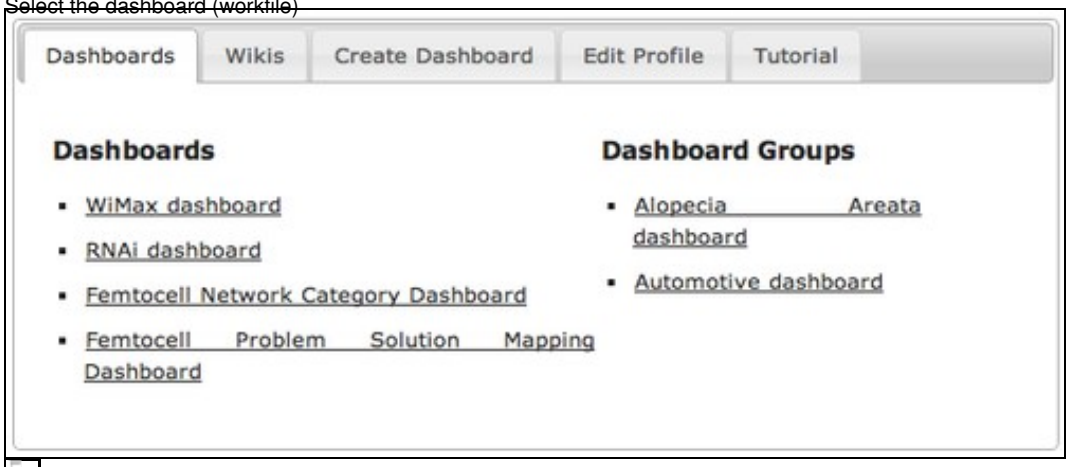
Workflow

A typical workflow is described below:

1. Log into the system

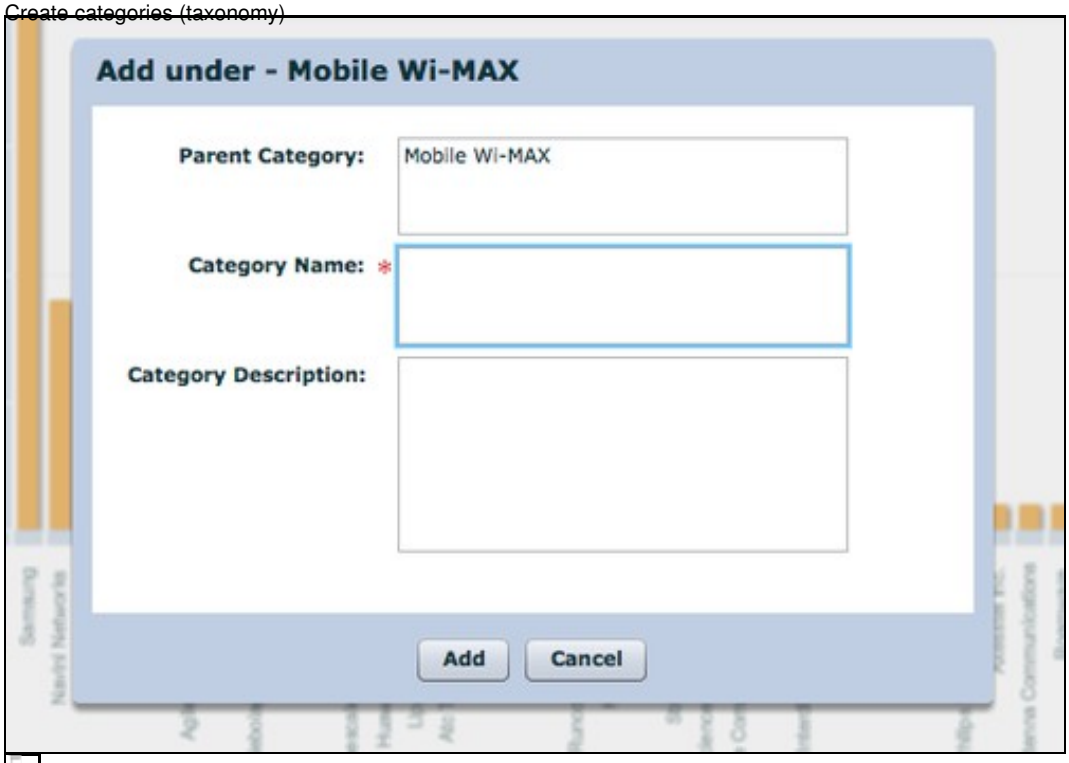
Login screen

2. Select the dashboard (workfile)



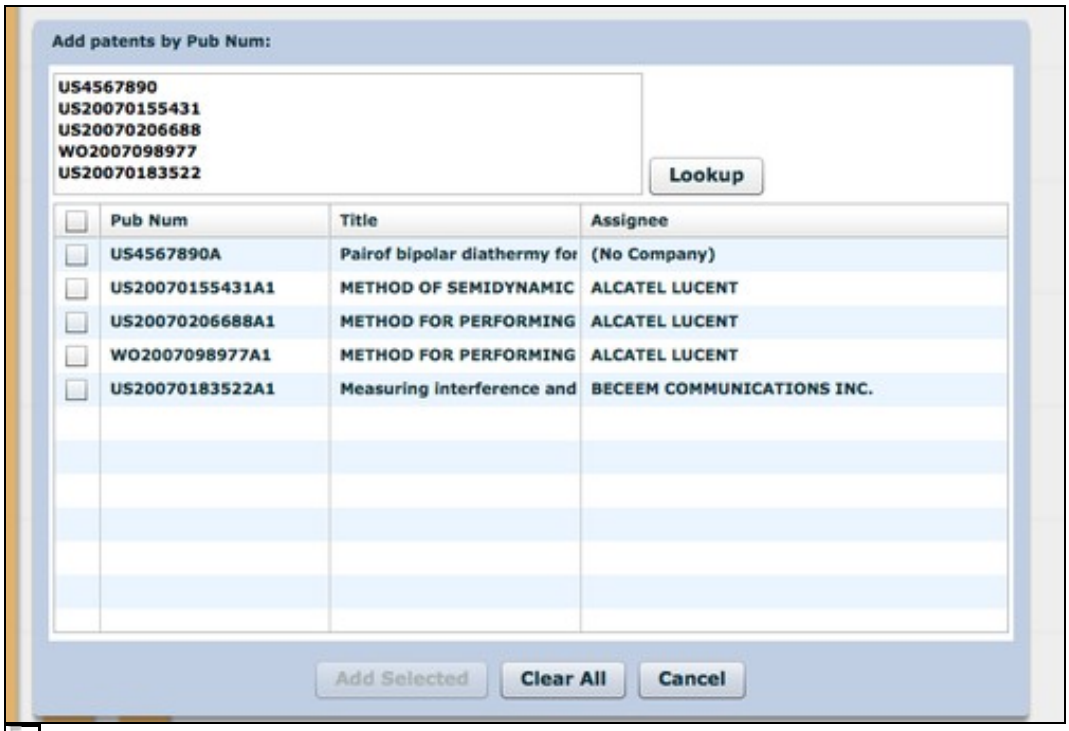
Select dashboard

3. Create categories (taxonomy)



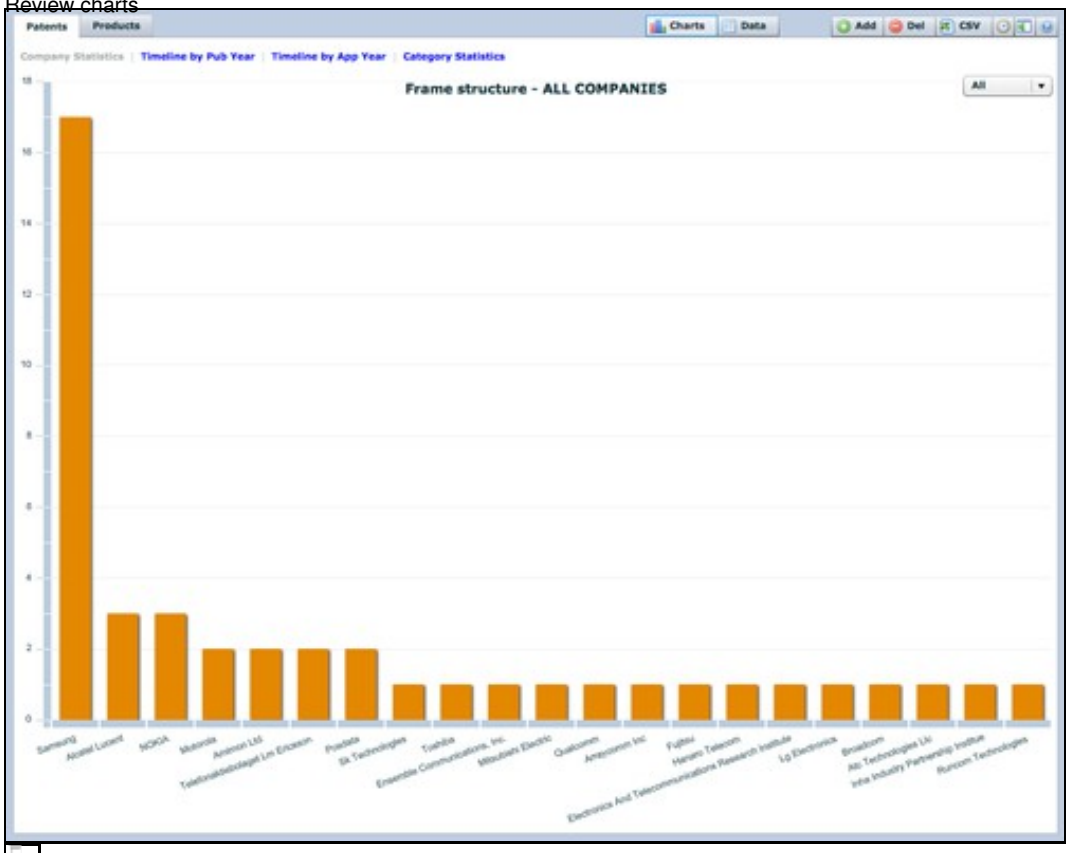
Add taxonomy categories

4. Add patents



Add patents

5. Review charts

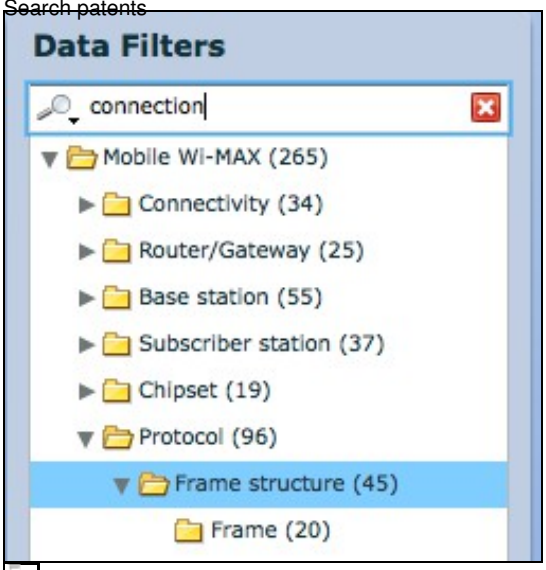


Review charts

6. Review patents

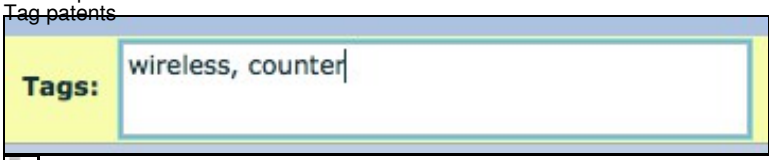
Review patents

7. Search patents



Search patents

8. Tag patents

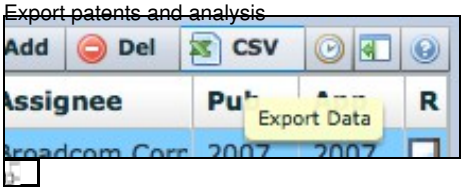


Tag patents

9. Add review notes for patents

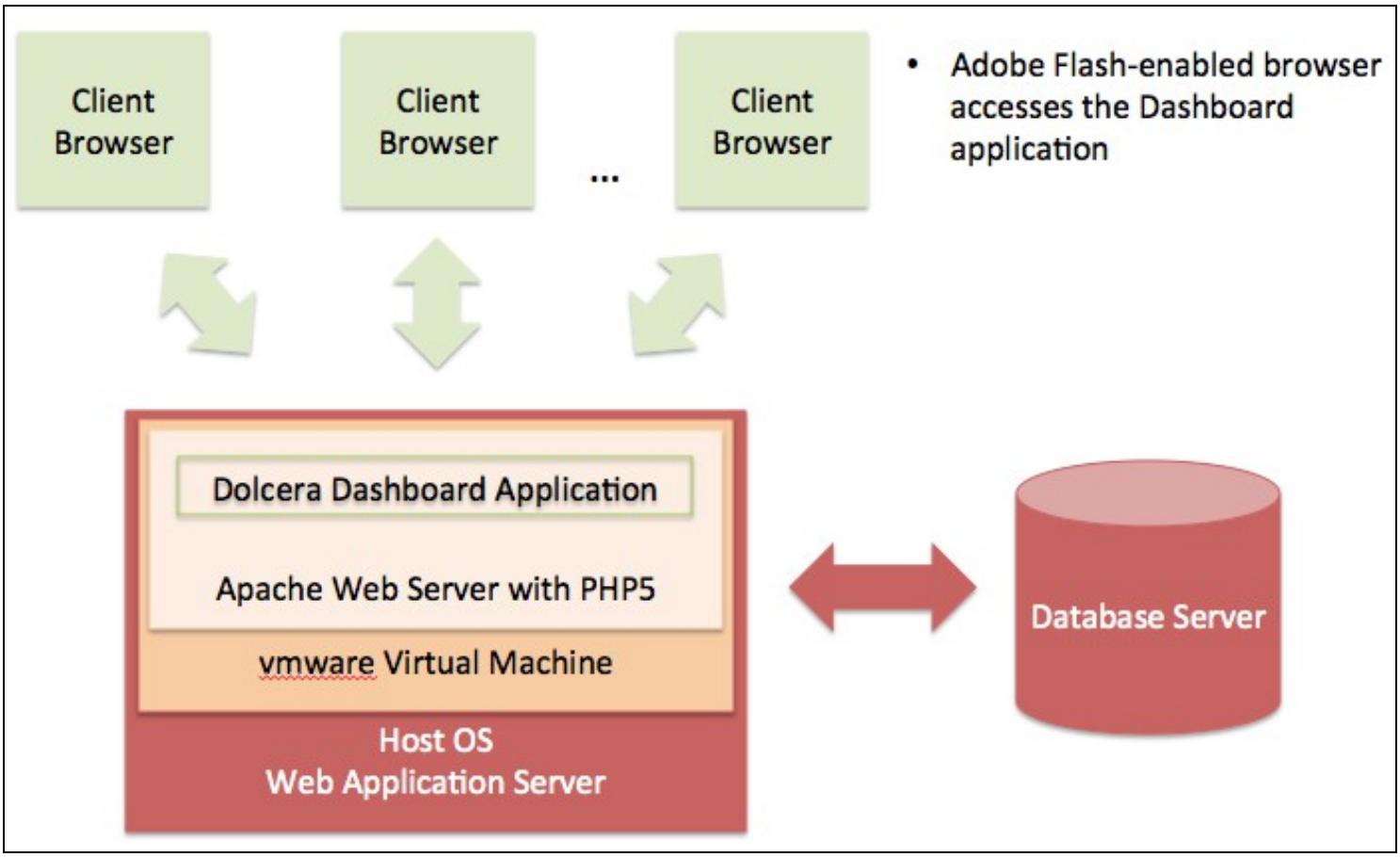
Patent notes

10. Export patents and analysis



Export patents

Deployment Architecture



Dolcera Dashboard Deployment Architecture

Hardware Requirements

As seen in the deployment architecture diagram, the typical deployment environment for the Dolcera Dashboard application consists of two main servers:

1. Server running the Dolcera Dashboard web application
2. Database server running PostgreSQL or Oracle database running the dashboard database

Web Application Server

The Dolcera Dashboard requires the following application server configuration:

- 64-bit server
- 4-core processor with a minimum speed of 2 GHz
- Ethernet card
- Minimum memory configuration: 8GB DDR3 RAM
- Minimum disk requirement: 2TB hard disk

Database Server

- Per client database server standards

Network

- The bandwidth to client devices offered by the web application server should be at least 10Mbps
- The connection between the web application server and the database server should be at least 100Mbps
- A continuous network connection is required between the user's device and the web application server, and between the web application server and the database server

Client Device

- The client application runs on any device that supports an Adobe Flash-enabled web browser
- A desktop or laptop computer with 1GB of available memory, any operating system (e.g. Windows, Linux, Mac OS) and a high-speed Internet connection will be capable of running the Dolcera Dashboard application
- A 1Mbps or faster network connection to the server will be sufficient to run the application

Software Requirements

The Dolcera Dashboard application is a PHP web application that runs on the Apache web server with PHP5, and connects to a PostgreSQL or Oracle database. The client application is a Flash application running inside the web browser.

Web Application Server

- Operating system: Linux
- Web server: Apache with support for PHP5

The web application server typically runs inside a vmware Virtual Machine running on any host operating system supported by vmware.

Database Server

- Database: PostgreSQL 8 or higher; or Oracle 10 or higher

Client

- Operating system: Windows, Linux, Mac OS (or others)
- Web browser: Internet Explorer 6 or higher, Firefox, Chrome, Safari, Opera
- Adobe Flash Player 10 or higher

Installation and Setup

The server hardware and software installation steps are described below:

Hardware Installation

The server landscape can be configured with the database and web application running on the same server; alternately, the two can run on different servers.

1. Set up a server with the specifications described above
2. Ensure the operating system has the latest updates applied to it
3. Ensure that both the web server and the database server (if separate) are connected to the network

Software Installation

Database Server

The following steps should be performed by a database administrator:

1. Configure the database server with the appropriate database version (specified in the Software Requirements section)
2. Download the Dolcera Dashboard database setup files (Dolcera_Dashboard_Database_vxxx.zip) to the database server from the location provided by the Dolcera representative
3. Unzip the files in a folder of your choice (e.g. /tmp folder)
4. Create a new database named *dolcera*
5. Run the file dolcera_dashboard_setup.sql to create the tables and other database objects: the setup script will also populate the master data for the database, and create a *dolcerauser* with privileges to change the data in the database, but not to alter the database; this user account will be used by the web application

Web Application Server

1. Download the Dolcera Dashboard installation package (Dolcera_Dashboard_vxxx.zip) to the web application server from the location provided by the Dolcera representative
2. Unzip the folder in any directory (e.g. /tmp)
3. Move the dolcera_dashboard_vm folder to the virtual machines folder on the web application server (e.g. /var/lib/vmware)
4. Create a new vmware virtual machine instance for the Dolcera Dashboard
5. Point the new vmware virtual machine instance to the dolcera_dashboard_vm folder
6. Set the network preferences for the virtual machine to bridged networking
7. Launch the new virtual machine
8. Log in with the root password supplied by the Dolcera representative
9. Change the database IP address setting as appropriate in the /srv/httpd/htdocs/dashboard/config/config.ini file
10. Assign a fixed IP address for the vmware instance and note this IP address
11. Once the software installation is complete, log into the application:
    - URL: http://*ipaddress_of_web_application_server*/auth/
    - Username: admin
    - Password: admin (you will be able to change the password thereafter)

Setting up the Environment

- Log into the URL as an administrator as described above
- Click on the link to the "Admin Interface"
- Create a new project
- Create a new group and assign the project to this group
- Create a new user and assign this user to the new group
- Create a new dashboard and add the dashboard to the project

Best Practices

Server Setup

1. The vmware virtual machine based installation of the web application server is designed for ease of installation and management
2. If vmware is not preferred, a different installer will be provided to run the web application directly on the server operating system
3. Apply the latest database and operating system patches on the servers
4. Change the admin password at regular intervals
5. Set up the database for backup on a nightly basis

User Management

1. Remove users once they leave the company
2. Assign access to dashboard workfiles to users individually
3. Limit the access for the administrator role