





# Connect 9.1 Features

Complete Web-Based Beta Test Management Solution

## Site Wide Features

- Custom URL (ex. beta.yourcompany.com, yourcompanybeta.com, etc) 
- 100% SSL Secured 
- Platform Independent (Windows, Mac, Linux, etc)
- Cross-Browser Compatible (Internet Explorer, Firefox, Safari, Opera, iPhone, etc)
- Simple, Modern, Consistent End-User Web Interface
- Custom Error Pages 
- Bookmark Capable Pages
- Connect Web-Services (API for Integrations with Connect Data) 

## Community Features

### Authentication (Login)


- Custom Login Screen (Branding/Text/Favicon)
- Single Central User Login
- Username or Password Retrieval Wizard (Secret Question/Answer, etc)
- Failed Login Temporary Lockout (Brute Force Attack Block)
- Link to Default Sign-Up Process or Other Key Pages

### General (All)

- Complete Branded Experience (Logos & Colors, Login and Site)
- Global Personal Settings
- User Opt-Out Functionality (Allow users to terminate their own accounts, handling existing data intelligently)
- Optional Auto-Watch (Users May Automatically Track What They Submit or Contribute to)
- Personalized Dates/Times (Based on User Selected Time Zone)
- Optional Global Relative Dates & Times (ex. 10 Days Ago, 3 Hours Ago)

- Session Timeout Reminder / Manual Extension
- Contact Community Admin Functionality (Optional)
- Custom Footers (Copyright Statements, Privacy Agreements, etc) 

### General (Administrative)

- Toggle Instant Inline Hints on Administrative Pages
- Direct Topic Based Documentation & Video Links ([docs.centercode.com](https://docs.centercode.com))
- Simple HTML Script Integrations (Google Analytics, DemandBase, etc) 
- Quick Project Jump List

### Community Homepage

- Personal Project List
- Public Project Opportunity List / RSS Feed
- Incomplete Survey Draft List
- Quick Access to all Profiling Forms (Platforms, Profiles, Surveys)

### Community Management

- Community Activity Dashboard (Drillable by Activity Type/Date Range)
- Custom Departments (Grouping Projects)
- Quick Project Enable/Disable
- Intelligent User Removal (Flushes Personally Identifiable Information, but not Feedback)
- User Account Merge (Including All Profile Information/Feedback)
- Custom E-mail Contacts (General, Support, Lost Password, User-Opt Out)
- Team-Type Access Control (Limiting, Enforcing, and Simplifying Appropriate Access)
- Manual Reset User Password

### Custom Sign-Ups


- Multiple Custom Sign-Ups
- Custom Sign-Up Landing Text (WYSIWYG Editor Support)
- Custom Sign-Up Steps (Surveys, Agreements, Downloads, etc)
- Sign-Up Users to One or More Teams (Providing Unique Appropriate Experiences)
- Password Security Strength Indicator
- Optional CAPTCHA Sign-Up

- Optional E-mail Verification Step
- User Sign-Up Limiting (Limit from 1 to 100,000+ New Community Members)
- Intelligent High-Traffic Self-Load Balancing
- Selectable Default Sign-up (ex. [yoururl.com/signup/](http://yoururl.com/signup/))


### Community E-mail Management

- Community E-mail Templates (see Project E-mail Templates)
- Community E-mail Logs (see Project E-mail Logs)
- Community E-mail Queue (see Project E-mail Logs)

### User Access Control

- Custom Community Teams
- 20+ Static Community Roles
- External User Authentications (LDAP, AD, etc) 
- Automatic Session Expiration
- Automatic Account Change E-mail Notifications

### User Profiling

- Custom Point-Based User Ranking System (Black List, Top Tester, etc)
- Historic Per-User Community/Project Comment Log
- Custom Test Platforms (see Form Engine)
- Custom User Profiles (See Form Engine)
- Community User Surveys (see Project Surveys) 

### Cross-Project Dashboards

- Custom Project Profile Forms (Track Stakeholders, Incentives, Milestones, etc)
- Cross-Project Labels Bind Data Between Projects
- Custom Project Filters/Views
- Share Project Filters/Views
- Unlimited Executive Dashboards (Participation, E-Mail, Bug Types, Dates, etc)
- Export Dashboard Results

### Custom User Experience


- Community Notice Engine

- Community Notice Macros
- Custom Look & Feel (Colors, Logos, Favicon, General Layout)
- Custom Online Help
- Custom On-Page Tips

### String-Set Management

- All UI/E-mail/Error Text is Customizable (7000+ Total, 900+ End-User Facing)
- Allows for Complete Localization (Multi-Byte Enabled)
- Edit Strings on Any Page, or from Central UI
- Track Customization Progress (ex. 34% Customized, 350 of 800)
- Marked End-User (Participant) Facing Strings
- Import/Export Strings (or Subsets) as CSV
- Multiple Project String-Set Support (1 Per Project)
- HTML/Script Support (Where Applicable)

### Community User Management

- Easily Create, Import, or Invite New Community Users
- Custom/Shared Community User Filters and Views
- Access All User Related Information (Profiles, Platforms, Participation, etc)
- User View/Filter Sharing
- Community User Filter Sets (Custom Quick Searches)
- Community User Data Caching System
- Detailed Community User Summaries (Profiles, Platforms, Surveys, Tasks, Feedback, etc)
- Assume Community User Identity (Act as User)
- Mass Community User Comment
- Custom Community User Macros (Simplify Multi-step Tasks)
- Community User Macro Scheduling (ex. Automatic Reminders to Update Aging Profiles, etc) 
- Import/Export Community User Data
- Instant Auto-Complete (AJAX) Community User Search (Summary, Assume, E-mail)

### Community Content Management

- Custom Community Content Types
- Unlimited Community Content

- Custom Title, Sub-Title, and Body (with WYSIWYG Editor and HTML Support)
- Community Content Availability Scheduling
- Participant Comment Logs
- Print View
- Attached Files (Secure or Insecure)
- External Linked Files (Akamai, HTTP, etc)
- Distributed Values (Incentive Codes, Gift Certificates, etc)
- Dynamic Tag Support (see Dynamic Tags)
- Digital Agreement Support (NDAs, Participant Agreements - See Digital Agreements)
- Content Team Access Control
- Content Access Options (Homepage, Menu, URL Link, or Notice Access)

#### **Community Reporting Engine** (see Project Reporting)

- Community User Reports (User Profiles, Test Platforms, Participation, etc)
- Community Survey Reports
- Multi-Element Custom Reports
- E-mail Report Distribution (PDF, Inline)
- 14 Chart Types (Single and Dual Axis)
- 5 Widget Types (Linear, Cylinder, Angular, LED, Thermometer)
- Geographic Reports (300+ Maps Displaying any User or Feedback Data)
- Report Embedding (External or Internal)

#### **Community Knowledge Base**

- Centrally Search Users, Survey Results, and Content
- Narrow Searches by Date/Age
- Complex AND/OR/NOT Searches
- Access Aware Results


## **Project Features**

#### **Project Templates**

- Launch a New Project in Seconds

- Build Unlimited Project Templates
- Clone any Existing Project
- Templates Include all Project Assets (Reports, Views/Filters, Agreements, Macros, etc)
- Include Previous Users (Optional)
- Pre-Built Best-Practices Starter Project Templates

### Project Setup

- One-Step Project Creation 
- Custom Project Visual Theme (Per-Project Custom Colors and Logos)
- Fully Custom Project String Set (Localized Projects)
- Default Project E-mail Address (for All E-mail Templates, Automated E-mail, etc)
- Custom Project Teams (Grouped by Type for Easy Access Control)
- 30+ Static Project Access Roles (Unlimited Resource Based Dynamic Roles)


### Project Homepage

- Centralized/Personalized Project Information Tabs
- Project Dashboard
- Custom WYSIWYG Project Overview (with Text, Images, and/or Video)
- Incomplete Draft List (Feedback, Forum Posts, Surveys)
- Project Manager Alerts
- Personal Participation History
- Blog Style Project Resource List
- Personal Watched Items
- Personal To-Do List (Across all Project Resources)
- Project Summary

### Knowledge Base

- Centralized Project Search (Feedback, Survey Results, User Forums, Tasks, Content, Releases, Distributed Values, and Users)
- Narrow Results Based on Resource Type (Feedback Type, User Forum, User Team, etc)
- Narrow Searches by Date/Age
- Complex AND/OR/NOT Searches
- Cached Results
- Access Aware Results (Limiting Results and/or Actions Available)

## Project User Management

- Easily Create, Import, or Invite New Users
- Custom/Shared Project User Filters and Views
- Utilize All User Related Information (Profiles, Platforms, Participation, History, Notices, etc)
- User View/Filter Sharing
- Custom User Filter Sets (Custom Quick Searches)
- User Data Caching System
- Detailed Project User Summaries (Profiles, Platforms, Surveys, Tasks, Feedback, etc)
- Assume Project User Identity (Act as User)
- Mass Project User Comment
- Custom Project User Macros (Simplify Multi-step Tasks - ex. User Applicant to Tester Promotion)
- Project User Macro Scheduling (ex. Automated User Participation Reminders Based on Login, etc) 
- Import/Export Project User Data
- Instant Auto-Complete (AJAX) Project User Search (Summary, Assume, E-mail)

## User Recruitment


- Unlimited Custom Recruitments
- Filter based on Any Community Data (Profiles, Platforms, Participation, History)
- Public Recruitments (Open/Marketing Betas)
- Custom Overview, Requirements, Incentives, Links (with WYSIWYG Editor and HTML Support)
- Custom Recruitment Steps (Surveys, Agreements, Downloads, etc)
- Recruit Users to One or More Teams (Providing Appropriate Unique Experiences)
- Custom URL for Manual Distribution
- Applicant Limiting (Limit to 1 to 100,000+ Applicants)

## Project Content Management


- Custom Project Content Types (News, Tutorials, Information, Agreements, etc)
- Unlimited Project Content
- Custom Title, Sub-Title, and Body (with WYSIWYG Editor and HTML Support)
- Project Content Availability Scheduling
- Participant Comment Logs
- Print View


- Attached Files (Secure or Insecure)
- External Linked Files (Akamai, HTTP, etc)
- Distributed Value Support (Incentive Codes, Gift Certificates - See Distributed Values).
- Dynamic Tag Support (see Dynamic Tags)
- Digital Agreement Support (NDAs, Participant Agreements - See Digital Agreements)
- Team Access Control
- Content Access Options (Homepage, Menu, URL Link, or Notice Access)

### Release Management


- Custom Release Types (Alpha, Beta, etc)
- Unlimited Releases
- Custom Title, Sub-Title, and Body/Release Notes (with WYSIWYG Editor and HTML Support)
- Release Availability Scheduling
- Participant Comment Logs
- Release File Distribution (4 Levels of Security)
- External Linked Files (Akamai, HTTP, etc)
- Digital Agreement Support (NDAs, Participant Agreements - See Digital Agreements)
- Distributed Value Support (Serial Numbers, CD Keys - See Distributed Values).
- Associate Feedback with Releases
- Team Access Control
- Release Access Options (Homepage, Menu, URL Link, or Notice Access)
- Upload Releases via standard FTP Client Protocol 

### Feedback Management

- Custom Feedback Forms (Bug Reports, Feature Requests, Daily Journals, etc)
- Unlimited Feedback Types 
- Unlimited End-User Feedback
- 10 Feedback Form Element Types (Label, Text, Single, Multi, Scale, File, Release, Platform, Comments, Date/Time)
- Conditional Feedback Forms
- Custom Workflow Processes (1 Per Category)
- External Feedback Integration Support (BugZilla, Test Track, etc)
- Multiple External Integrations Per Feedback Type (BugZilla, etc)

- File Attachments in External Destinations 
- Custom Bug IDs (Prefix, Starting Count, Length)
- Automated E-mail (Template) based on any Status Change (to Submitter and/or new Owner)
- Custom Feedback Filters & Views
- Utilize All Submitter Related Information (Profiles, Platforms, Participation, History, Notices, etc)
- Feedback View & Filter Sharing
- Custom Feedback Filter Sets (Custom Quick Searches)
- Feedback Data Caching System (Update Aware)
- Feedback Check-Out & Check-In
- Comment System with Notifications
- View Related Feedback (Easily View other Feedback from the Submitter)
- Linked User Surveys (Easily View Surveys by the Feedback Submitter)
- Print View
- Feedback Linking (Related Feedback, Duplicates, etc)
- Feedback History (Including all Previous States)
- Feedback Import/Export
- Watch Feedback (Track Edits on Selected Feedback)
- User Draft Support
- Sophisticated Team Access Control (13 Roles Per Feedback Type)
- Element Level Access Control (ex. Team Member or Project Only Fields)
- Instant AJAX Feedback Search
- Feedback Type Templates

### Project Surveys


- Unlimited Surveys 
- 9 Survey Element Types (Label, Text, Single, Multi, Scale, File, Platform, Comments, Date/Time)
- Multiple Survey Styles (1 Column, 2 Column, Thin, Wide, Full, Normal Title, Large Title, Backlit Title)
- Conditional Survey Elements
- Inline Images/Videos/Custom Text (WYSIWYG Editor Support)
- Survey Scheduling
- Custom Survey Reporting
- Results available in User and Feedback Views/Filters

- User Draft Support
- Team Access Control (Survey or Element Level)
- Release Access Options (Homepage, Menu, URL Link, or Notice Access)

### Task Lists

- Unlimited Task Groups, Lists, and Tasks
- Simple Task List Reporting (with Drilldown)
- Selectable Task Outcomes (In Progress, Complete, Success, Failure, Cannot Complete)
- Task Scheduling
- Task Outcome Redirection (Next Step: Report a Bug, Suggest a Feature, Leave a Comment, etc)
- Inline File Attachments
- Detailed Task Steps (WYSIWYG Editor Support)
- Task Due Dates
- Task Priorities
- Print View
- Task Acceptance (Free or During Recruitment)
- Team Access Control
- Task List Access Options (Homepage, Menu, URL Link, or Notice Access)

### User Forums

- Unlimited User Forums
- Unlimited User Forum Posts
- NNTP Forum Access 
- E-mail Forum Access (Including Reply Posting)
- Daily Digest or Individual Post E-mail Options
- Moderator/Team Member Identified Posts (Highlight, Icon, Logo)
- Moderator Locked Threads
- Cross-Forum Recent Post List (With Mod Icons)
- Participant "Read Only" Forums (All Moderator Posts)
- Participant "Reply Only" Forums (Moderator Hosted Topics)
- 20+ Powerful Post Filters (By Date, Post Type, Mod Posts, My Posts, etc)
- Direct Post or Reply Links

- Administrator Thread Moving (Between Forums)
- Automatic Old-Post Archiving
- Sticky + Hot Topics (Highlight Important or Popular Topics)
- Familiar BBCode Style Formatting (Size, Color, Bold/Italic, Lists, URL Links, etc)
- Post File Attachments (Including Inline Images)
- Emoticons! (:)
- Custom User Signatures
- User Draft Support
- Watched Threads (Track Posts on Selected Threads)
- Team Access Control
- User Forum Access Options (Project Home, Project Menu, URL Link)

## Wikis

- Unlimited Project Wikis (Allow User Collaboration for Manuals, Marketing Materials, and More)
- Unlimited Wiki Pages
- Complete Edit History
- Simple Page Management (Easily track Orphaned and Missing Pages)
- Granular Wiki Role Access Control
- Optional Approval Process
- Simple Conflict Resolution Process
- Support both Markdown and BBCode Formatting Syntaxes
- Inline Images and Tables
- Per-Page File Attachments
- Per-Page Comment Logs
- Import Wiki Content (Import Markdown or BBCode)
- Export Wiki Content (Export as Markdown, BBCode, HTML, or PDF)
- Wiki Stats / Leaders Pages (Quickly view Least/Most Edited/Viewed Pages)

## E-mail Templates



- Unlimited Custom Reusable E-mail Templates
- Custom From Name/E-mail
- File Attachments

- Inline Images (Included or Linked)
- Custom Headers
- Custom CC/BCC
- HTML E-mail (WYSIWYG or HTML Editing)
- Dynamic Tag Support (see Dynamic Tags)
- Custom Priority
- Optional Opt-Out Footer

### E-mail Logs


- Complete Log of all Project E-mail
- Resend or Forward any E-mail
- View E-mail by User, Date Range, or String Search
- Search E-mail sent or in Queue
- Save Log Filters for Reuse

### Project Notices

- Enforce Workflows upon Entering a Project
- Preview Workflows for Any User Type
- Push Content, Releases, Surveys, or Tasks
- Require Passwords to Proceed
- Require Digital Agreements to Proceed
- Yes/No Notices (Optionally Require "Yes" Answer)
- Block Project Access with Custom Text
- Team Access Control
- Conditional Notice Macros (Conditional/Branching Logic) 
- Static Notice Macros (Send E-mail, Add User Comments, HTTP Post, etc) 
- User Notice Results Available in Filters/Views/Dynamic Tags, Recruiting, and Reporting

### Custom Project Menu

- Rename All Sections
- Re-Order All Sections
- Add Internal or External Links
- Team Access Control for Custom Links


- Maintain User Session to Outside Links
- Drag and Drop Frequently Used Project Manager Tools 

### Automated Project Newsletter

- Custom WYSIWYG or HTML Introduction
- Dynamic Tag Support
- Personalized Content (Unfinished Tasks, Surveys, etc)
- Custom Periods (Daily, Weekly, Monthly)
- Team Access Control

### Project Reporting

- Fully Custom Reporting Engine
- Build and Save Single or Multi-Element Reports
- Utilize Complex Filters (Including All Available User or Feedback Data)
- Report on All User Information (Profiles, Platforms, Surveys, Participation, History, etc)
- Report on All Feedback Related Information (Submitter, Owner, Elements, etc)
- Report Across Dynamic Data Sources (ex. Feedback Element vs. Survey Element)
- Drill into User or Feedback Reports
- Complete Report History (Previous 100 Cache Instances)
- Quick Survey or Task List Reports
- Custom Report Labels (WYSIWYG or HTML Editing)
- 10 Single-Axis Chart Styles (Column, Bar, Pie, Area, Pyramid, Data Table, Funnel, Pyramid, etc)
- 4 Dual-Axis Chart Styles (Column, Bar, Area, Line)
- 5 Widget Types (Linear, Cylinder, Angular, LED, Thermometer)
- Geographic Reports (300+ Maps Displaying any User or Feedback Data)
- Custom Spreadsheet Reports
- Formatted Document Reports
- Report Sharing
- Report Caching System (with E-mail Completion Notice)
- Print View
- Automatic Cache Refresh
- Report E-mail Distribution (PDF or Inline E-mail)

- Report Embedding (External or Internal)
- Quick Report Links (Easily Create Relevant Reports) 

## Common Features

### Distributed Values

- Mass Distributed Value Import
- Auto-Generated Values
- Multiple Sub-Types (Mac, Windows, English, Japanese)
- Multiple Values Per User (# Selectable)
- Mass-Assign to Users (for E-mailing)
- Auto-Assign to Users (via Notices)
- Embed Values in Custom Link

### Digital Agreements

- Enforce as Notices (Push when Entering a Project or Community)
- Dynamic Tag Support (see Dynamic Tags)
- Creates a Unique Snapshot at Signature Point
- Accessible and Printable By User

### Dynamic Tags

- Inject User-Specific Data upon Display (ex. Name, Address, # of Bugs, etc)
- Based on User or Feedback (Depending on Context)
- Includes Access to Dynamic and Static Fields (Profiles, Platforms, Surveys, Feedback, Participation, History, etc)

### File Uploads and Downloads

- Common File Upload Interface
- In-Page AJAX Uploads
- Visual Upload Progress Bar
- Secure File Downloads (4 Unique Security Levels)
- Complete Download Logs (Success, Failure, Download Times, etc)

## External Feedback Integration


- Simple E-Mail or HTTP Integration
- Custom To/CC/BCC Support
- Custom From/Reply Name
- Custom Subject/Body (with WYSIWYG Editor Support)
- Dynamic Tag Support (Both Subject and Body)
- Plaintext and HTML E-Mail Support
- Optionally E-Mail Text as Attachment
- External Destination Templates (BugZilla, etc)

## Common Form Engine

- Shared Functionality for Forms (Platforms, User Profiles, Project Profiles, Community & Project Surveys, Feedback Types)
- 10 Unique Form Element Types:
  - (1) Labels (Attached Files/Images, Hide in Results, WYSIWYG Editor Support)
  - (2) Text (Preset or Custom Size, Default, Example, Unit Type, Required, RegEx Validation, Treat as URL, Character Counter)
  - (3) Single-Choice (Display as Drop-Down, Horz Radio, Vert Radio, Default, Required, Unit Type, Unique Labels + Values)
  - (4) Multi-Choice (Default, Required, Unit Type, Unique Label + Values)
  - (5) Rating Scales (Show N/A, Scale Base 0 or 1, 2-10 Points, Right/Left/Middle Labels, Display Numbers, Comparative, Required)
  - (6) File Attachments (Multiple Files, Required)
  - (7) Comment Blocks (Allow Notifications, Allow Previous Comment Editing)
  - (8) Date/Times (Date and/or Time, Required, Relative or Defined)
  - (9) Related Releases (Available Release Types, Allow Multiple Releases, Allow Inactive Releases)
  - (10) Attached Test Platforms (Narrow to Type, Allow Multiple, Required)
- All Elements include Title (4 styles), and Description (with WYSIWYG Editor Support)
- All Elements Collect Multi-Byte Data
- Optional Cookie-Based "Remember Previous Answer"
- Optional Alternate Column (Spreadsheet) Titles
- Simple Element/Item Re-Positioning
- Conditional Branching Elements (Display Fields based on Previous Answers)
- Display Element Results in Summaries (User Summaries, Test Platform Summaries)
- Select Fields to Display in Search Results
- Save Form Elements Presets (for Common Preset Element Configurations)

- Complete Form Templates (for Quick Survey, Feedback, Profile, Platform Reuse)
- Element Level Access Control (Set who Submit, View, Modify)
- Team Access Control (Set who can Submit, View, Modify)

### **WYSIWYG Editing**

- Common Interface for Editing Text
- Familiar Formatting (Bold, Italic, Underline, Strikethrough, Size, Color, Typeface, Justification, Lists, Indents)
- Paste with Formatting from Outside Tools (Word, etc) 
- Dynamic Tag Support
- Simple Drag-Resizable For More Editor Space
- Optionally Edit HTML Directly

### **User Drafts**

- Automatic Draft Saving
- Manual Draft Saving
- Supports All Form Elements
- Centralized Draft Management
- Simple Draft Loading