



Connect Beta Test Management Solution

Licensing Overview

Updated **April 5, 2011** (Version 1.9)

Pricing and parameters in this document are valid for 45 days after delivery.
Updated versions may be requested from sales@centercode.com.

LICENSE METHODOLOGY

Connect is offered in two Editions. **Connect Standard** is designed for Product and Beta Managers running 1-5 beta tests per year, while **Connect Enterprise** is aimed at Beta Management Teams and larger organization running more than 5 beta tests per year. Connect Editions are offered in a **hosted SaaS Subscription model**.

Basic License Pricing

The following basic license prices are offered. Standard Edition is offered monthly, while Enterprise Edition is offered annually.

Parameter	Standard	Enterprise
1 License	\$1,000/m	\$2,000/m
5 License Bundle	\$4,000/m	\$8,000/m
10 License Bundle	\$6,000/m	\$12,000/m
Additional Disk Space (5GB)	\$50/m	\$50/m

Discount: Annual Commitments paid up front receive 2 months free.

License Based Parameters

The following usage parameters are *multiplied* by the number of licenses purchased.

Parameter	Standard	Enterprise
Candidates <small>Beta Applicants, Customers</small>	1,000	Unlimited
Participants <small>Beta Testers</small>	1,000	Unlimited
Team Members <small>Employees, Vendors, etc.</small>	10	Unlimited
Administrators <small>Product Managers, Beta Managers</small>	1	1
Active Projects	5	10
File Upload Space	10GB	20GB

Functional Differences

Edition features are designed to meet specific target markets.

Parameter	Standard	Enterprise
Cross-Project Reporting <small>Build dashboards containing data across projects</small>	-	•
Project Profiles <small>Track Project Deliverables, Stakeholders, Dates, etc</small>	-	•
NNTP User Forums <small>Allow users to access User Forums via Usenet/NNTP</small>	-	•
Custom User Authentication <small>LDAP, Active Directory, etc</small>	-	•
Trade Compliance <small>Control access based on country/IP address</small>	-	•
Maximum Elements Per Form <small>eg. 40 Questions per Survey</small>	40	80
Maximum Form Types Per Scope <small>eg. 5 Active Surveys Per Project</small>	5	Unlimited
Teams Per Scope <small>eg. 10 Teams in Community, 10 Teams per Project</small>	10	Unlimited
Notices Per Scope <small>eg. 10 in Community, 10 Notices Per Project</small>	5	10
Maximum Saved/Scheduled Reports Per Scope <small>eg. Community or Individual Project</small>	20	40

LICENSING DEFINITIONS

Candidates

Users who have signed up for the Community, and therefore have a user account with both username and password. In order to Apply for a Project a user must have previously signed up for the Community and therefore Applicants and Community Members are treated the same, as they are always the same broad set of users.

Participants

Unique users who have been selected to participate in a Project. Note that one specific user who belongs to multiple projects only consumes one participant seat. For example, if Project A had 100 Participants, and Project B had 100 Participants, but 20 Users were Participating in both Projects, 180 Participant Seats would be consumed. Only unique Participants in Active Projects are counted toward the total number of Participant Seats.

Team Members

Unique users whose primary role includes review feedback, moderating forums, and reviewing project results (tasks, surveys, etc) via Project Reports. These users have access to moderate user forums and own feedback, but may not alter the structure of the project itself; including content, releases, surveys, etc (see details below). Similar to Participants, individual Team Members belonging to multiple projects do not consume multiple Team Member seats. Also similar to Participants, only unique Team Members in Active Projects are counted toward the total number of available Team Member seats.

Administrators

Unique named users whose primary role includes managing either the Community or individual Projects. These users may optionally have complete control over the entire structure of the Community and Project, but may be limited via Teams and Roles to either or both. Similar to both Participants and Team Members, individual Project Managers managing multiple projects simultaneously count as only a single seat, and only those in Active Projects are counted toward the total.

Best Practice Recommendation: While these users are licensed as one type, it is recommended that subscribers limit access to Community Management functionality to only those responsible for making Community level decisions. This simplifies the experience for users focused on Project Management activities and prevents structural changes that may cause overlap and other unnecessary issues.

Active Projects

A Project currently set as "Active" in Connect, allowing either Participants and/or Team Members to access it. Projects may be activated or deactivated at any time via a simple checkbox in the Connect interface. Note that Inactive Projects may still be accessed by their Project Managers.

File Upload Space

Space available for any files uploaded by any users – including Community and Project Managers, Team Members, or Participants. This includes attachments to Test Platforms, User Profiles, Project Profiles, Community Content, Project Content, Releases, E-mail, Tasks, Surveys, Feedback, User Forums, and all other current and future features where file uploads are allowed via the Connect user interface. The following three items are included in all subscriptions, and do not count toward File Upload Space: (1) any externally linked files (such as Akamai); (2) the Connect Database itself (including all textual copy, feedback, project structure, logs, etc); (3) Backups of all uploaded files, logs, and the database.

LICENSED USER TYPE ACCESS DETAILS

The following parameters apply to the various user types outlined in the license.

Community Members

Your customers who have joined the Community intending to participate in beta tests

“Community Members” are able to:

- Join the Connect Community by completing a custom Sign-up
- Adjust Personal Settings to customize their personal experience
- Provide and update detailed User Profile information such as:
 - (1) Contact Information (2) Personal Demographics (3) Educational Background (4) Employment/Business Information
- Provide information detailing products they own or have direct access to (Test Platforms) such as:
 - (1) Computers (2) Web Browsers (3) Mobile Phones (4) Gaming Devices (5) Network Devices (6) Networks (7) Servers
- Execute Community level Agreements (Community NDA, etc)
- View Community Content such as news, instructions, and tutorials
- Receive E-mail (automated or manual) from Community Managers
- Apply to participate in unlimited Projects
- Complete Project Notices (Agreements, etc) while applying for Projects
- Agree to complete Tasks while applying for Projects
- Complete Surveys while applying for Projects

Community Managers

Administrators who design, oversee, and maintain Connect implementations

In addition to functionality available to “Community Members”, “Community Managers” are able to:

- Define custom Sign-Up processes for Community Users
- Define basic User Account requirements, including external User Authentications (LDAP, AD, etc) (Enterprise Edition Only)
- Create and import Community Users
- Create User Community Teams and assign access rights via Community Roles
- Define the Community User experience via Community Notices, including Content, Surveys, User Profiles, & Test Platforms
- Develop User Profile and Test Platform forms to profile Community Members
- Set User Ranking standards for Project Managers to track user progress and histories
- Develop and manage custom Content for Community Members via Community Content Management
- Build and deploy Surveys for the Community via Community Survey Management
- Generate and distribute Reports covering Community Users and site usage
- Build Project Profile forms to organize Project specific information for use in Cross-Project Dashboards
- Access and manage Cross-Project Dashboards
- Manage Community level E-Mail Templates, Logs, and Queues
- Create and schedule Community User Macros, including automated Profile/Test Platform update reminders
- Define cross-project User Forum standards
- Determine the look and feel of the site via Community and Project Theme Management
- Modify all textual Strings utilized throughout the site, as well as custom Online Help and on-page Tips

Participants

Customers who have been selected to participate in a beta test

“Participants” are able to:

- Join, access, and participate in multiple Projects
- Submit unlimited custom Feedback such as: (1) *Bug Reports*, (2) *Feature Suggestions*, (3) *Daily Journals*, etc
- Complete Project Surveys
- Complete Project Tasks and Task Lists
- Participate in Project User Forums via Web, E-Mail, NNTP (NNTP available in Enterprise Edition only)
- View Content (News, Tutorials, etc) and complete Notices and Agreements
- Download Files (Releases) and be Distributed Values (Serial Numbers, Product Keys, Incentives Codes, etc)
- Track Selected Feedback and Forum Posts, and View their Personal Participation History

Team Members

Internal staff such as QA, Marketing, and Executives who benefit from beta feedback

In addition to functionality available to “Participants”, “Team Members” are able to:

- Moderate User Forums
- Own and manage Feedback, Create personal Feedback Views and Filters
- Create and View personal Project and Community Reports
- Access shared User Views/Filters in User Management

Project Managers

Project administrators with access to all Project Management functionality

In addition to functionality available to “Team Members” and “Participants”, “Project Managers” are able to:

- Create Projects and Project Templates
- Create User Project Teams and assign access via Project Roles
- Create, import, and recruit Project Users via the User Recruitment Tools
- Create and schedule Project User Macros including automated participation reminders
- Share and distribute (E-mail PDF/HTML) Reports
- Create and manage custom Feedback Types including custom External Destinations (BugZilla, etc), and Workflows
- Administrate Feedback, share custom Feedback Views and Filters
- Create and manage Content Types and Content including Agreements, Project News, Instructions, Tutorials, etc.
- Create and manage Releases including Release Notes, Product Codes, File Uploads, and External File Links (Akamai, etc)
- Create, manage, and assign Task Lists and Tasks
- Create, manage, and assign User Surveys
- Create and manage User Forums and User Forum Categories
- Customize the Project User experience via Project Notices and conditional Notice Macros
- Manage Project E-Mail Templates, Logs, and Queues
- Administrate automated Project Newsletters
- Modify the Project Menu via Project Menu Tools
- Utilize Cross Project Dashboards and Profiles

LICENSE SCENARIO EXAMPLES

The following examples are intended to demonstrate appropriate usage of Connect licenses in a real world scenario.

Standard Edition Example – WidgetCo, Inc.

Scenario

WidgetCo has 1 dedicated full-time employee managing beta tests for a total of 5 hardware products, each which releases roughly once per year. This employee is responsible for all beta tests, but has the support of 5 quality engineers to assist with moderating forums and scrubbing feedback.

Solution

WidgetCo chooses to purchase 1 license of Connect Standard. This license scenario would result in a total annual cost of \$12,000. This would provide WidgetCo with 5 active Beta Projects at any given time, with 250 unique participants across them - selected from a pool of up to 2,500 customers. In addition to the 5 QA engineers involved in the beta, 20 additional employees (marketing, executives, etc) would have access to review all beta related data (Feedback, Forums, Surveys, Tasks, etc) within the various Projects at any time.

Enterprise Edition Example – Vandelay Software

Scenario

Vandelay has 3 dedicated full-time employees managing beta tests for a total of 10 software products, each which releases roughly twice annually. These employee are responsible for all aspects of conducting the beta tests including recruiting users, scrubbing feedback, and reviewing survey and task results. These employees are also responsible for ensuring that feedback is integrated into appropriate internal systems, and distributed to employees who require beta related data.

Solution

Vandelay chooses to purchase 3 license of Connect Enterprise. This license scenario would result in a total annual cost of \$48,000 (\$18k + \$16k + \$14k). This would provide WidgetCo with 30 active Beta Projects at any given time, with 1,500 unique participants across them - selected from a pool of up to 15,000 customers. In addition, 150 Vandelay employees would have access to review all beta related data (Feedback, Forums, Surveys, Tasks, etc) within the various Projects at any time.

LICENSING FAQ

How does Connect consume the user license types (Participants, Project Managers, etc)?

Connect groups users and their relative access by *Teams*, which are created by Community and Project Managers. When creating a new Team, a *Team Type* is selected (this may be easily changed later). These Team Types match up the various User Types which are used for Licensing (Project Managers, Team Members, Participants, etc). Once a Team has been set to a Team Type, any users added to that Team will consume the Seats of that Type. Note that any number of Teams may be created for each

Team Type, allowing a great deal of granular flexibility for granting access to different Teams (such as QA, Marketing, US Testers, European Testers, etc).

Does Connect block us from exceeding our user limits?

Yes. Each Connect implementation has limits set for each Team Type. Connect will display a licensing dialog in the event that any action taken will result in surpassing the maximum seats available for that Team Type.

Can we remove users to free up seats (for example Participants)?

Yes, Community Members and Participants can easily be removed at any time via Community and Project User Management tools. In addition, only users currently on Project Manager or Team Member teams are counted toward the license total. Removing these users from these teams (or simply deactivating projects) instantly frees up these licenses.

Can we check our current license parameter usage?

Yes. Connect offers you a simple dashboard which displays current usage and limits for your implementation.

Can users share the same Project Manager seat throughout the year?

Yes – but not at the same time as Connect is designed to limit the number of Active Project managers at any time. For example, if a license includes 5 Project Manager seats, and 3 Project Manager seats are currently being used (thus 2 are available), and one Project Manager completes his project and therefore deactivates it – 3 seats will be available at that point. Once a new user is granted access to Project Manager functionality in a new Project – a seat will be consumed and 2 will again be available.

Can my employees also be Participants (Testers)?

Yes, but they will consume both types of seats (Participants and Team Members) if they are included on Teams of both Types. Generally this is not necessary if they are already being utilized as Employees (Team Members), as they can be given Participant Access as well. Alternatively, Employees will only consume Participant Seats (of which there are generally more available) if they are not utilizing Employee (Team Member) access.

Can I purchase additional licenses at any time?

Yes. Connect Licenses are pro-rated for the remaining term of the subscription. For example if you have already purchased 1 annual license, and would like to purchase an additional license 6 months into your subscription period - you will only be billed for 50% of the cost of the new license. Once the subscription reaches its end, your renewal would include 2 licenses.

Can I mix subscriptions of different editions (Standard + Enterprise)?

Each Connect Subscription (and thus Community Implementation) may only utilize one Edition. If you wish to mix Editions, they would need to be purchased separately and utilized for separate User Communities.

Can I upgrade from Standard to Enterprise Edition?

Yes, upgrade plans are available. Please contact your Centercode Account Representative or sales@centercode.com at any time.

Is there an “unlimited” Connect license available?

An *Unlimited* Connect Enterprise license is offered at **\$200,000** annually. This license does not limit Projects, Project Managers, or Internal Team Members, but does limit Community members to a maximum of 100,000 (larger Communities require discussion). These implementations are hosted on a dedicated server and include (1) On-Site training; (2) Community Implementation; (3) Pilot Project Support; and (3) Coaching for up to 5 individuals.