



centercode

Connect 9.2

Notes + Documentation

August 2010

Introduction

Connect 9.2 offers a number of great tools to reduce the time necessary to manage a large community of users, including improved methods to reset passwords, trade compliance to restrict access to specific countries or IP ranges, and the long awaited ability to require unique E-mail addresses. This release also addresses well over 75 bugs, and includes improved workflows for tools throughout many areas of the platform (including Surveys and Feedback Types).

Connect 9.2 will be offered to customers throughout August 2010. Your account manager will be contacting community administrators to schedule a suitable update window for their individual programs.

Thanks!



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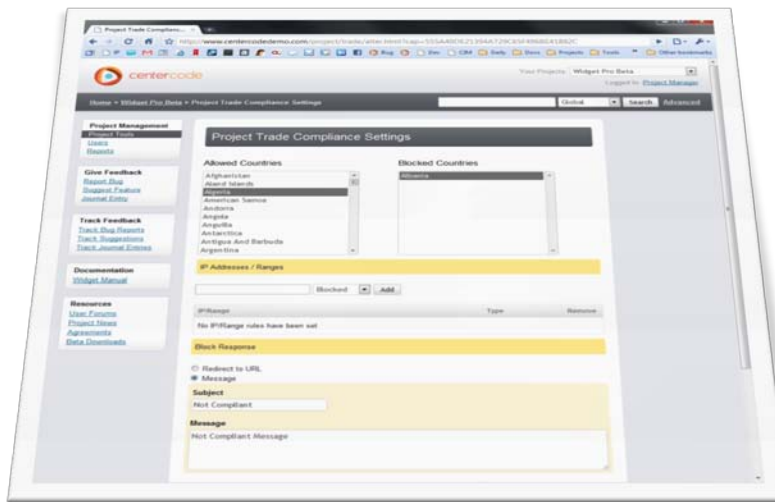


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What You Need To Know!

The following are key changes that all Community Administrators should be aware of.

- **Security Question Reset** - All users will be required to supply a new security question (secret question and answer) from an expanded list of improved questions. This change is due to the improved username/password retrieval/reset functionality now available in Connect 9.2.
- **Unique E-Mail Address Support** - Connect 9.2 includes **optional** new functionality which requires users to maintain a unique E-mail address from all other users in the site. This functionality is **disabled by default**. This is due to the fact that legacy data (duplicate E-mail addresses) must be handled (via merging or removing duplicate accounts) first in order to ensure a smooth transition to this new method. While you may choose to enable this functionality at any time, we are recommending that Centercode helps with the transition, including database level merging of user accounts (free of charge). If you would like to use this feature, please contact Mario Sancho (mario@centercode.com) to schedule a meeting to plan this transition.

Release Highlights

This release is comprised of the following components:

1. **Trade Compliance** - Control user Community and Project access by originating country or IP
2. **Unique E-Mail Addresses** - Require unique E-mail addresses to reduce duplicate user accounts
3. **Single Sign-On** - Provide a transparent user login process utilizing external authentication systems
4. **Quick Feedback Reports** - Generate reports based on multiple feedback elements
5. **Simple User-Password Admin Reset** - Quickly and securely reset user passwords
6. **Enhanced User Password Self-Reset** - Allow users to more easily reset their own passwords
7. **Cross-Project Survey Templates** - Share Community Survey Templates into Projects
8. **External Common Copy Pages** - Provide copy (Privacy Policy, TOS, etc) to external users
9. **Bug Fixes** - Over 75 substantial customer bug fixes
10. **Other Changes** - A huge number of small improvements, polish, and additional fixes.

Trade Compliance (Enterprise Edition Only)

Connect now offers both the ability to restrict and/or grant access to their Community and individual Projects via either a user's Country and/or IP Address. This functionality is intended to allow companies to comply with trade regulation laws regarding encryption and other sensitive software and data which may not be utilized in certain countries or regions.

Trade Compliance Notes

- Blocks may be set up for the entire Community or individual Projects.
- Project blocks inherit Community Blocks (i.e. a Country blocked from the Community scope will automatically block users from that country in all projects, also hiding those countries from project level block lists).
- Access to the Trade Compliance interface is controlled by the [Community Administrator](#) role at the Community level, and [Project Administrator](#) role at the Project level.
- Blocked users will be redirected to a specific URL or be shown a specific message (optional to Administrator).

Trade Compliance Tasks

Block Countries from the Community

The following steps will allow you to block Countries from accessing the Community.

1. From the Community Homepage (as a Community Manager) navigate to **Community Tools** on the left menu.
2. Next, navigate to **Settings** on the left-hand menu.
3. Click on the **Trade Compliance** item in the Community Settings section.
4. Move desired Countries from the **Allowed Countries** list to the **Blocked Countries** list by double-clicking them.
5. Scroll to the bottom of the page and click on the **Submit** button.

You have successfully blocked Countries from accessing the Community level of your site.

Block an IP or group of IPs from the Community

The following steps will allow you to block an IP or a group of IPs from accessing the Community.

1. From the Community Homepage (as a Community Manager) navigate to **Community Tools** on the left menu.
2. Next, navigate to **Settings** on the left-hand menu.
3. Click on the **Trade Compliance** item in the Community Settings section.
4. Enter the desired IP or IP range into the field underneath the heading **IP Addresses / Ranges**, ensure **Blocked** is selected, and then click the **Add** button to the right.
5. Continue with this until all of the desired IPs or IP Ranges have been added below.
6. Scroll to the bottom of the page and click on the **Submit** button.

You have successfully blocked an IP or groups of IPs from accessing the Community level of your site.

Block Countries from a Project

The following steps will allow you to block additional Countries from accessing a Project. Note that Countries blocked at the Community level are automatically blocked from a Project.

1. From the Project Homepage (as a Project Manager) navigate to **Project Tools** on the left-hand menu.
2. Click on the **Trade Compliance** item in the Project Tools section.
3. Move the desired Countries from the **Allowed Countries** list to the **Blocked Countries** list by double-clicking them (Countries already blocked at the Community level will be displayed below).
4. Scroll to the bottom of the page and click on the **Submit** button.

You have successfully blocked Countries from accessing the Project level of your site.

Block an IP or group of IPs from a Project

The following steps will allow you to block an additional IP or group of IPs from accessing the Project. Note that IPs blocked at the Community level are automatically blocked from all Projects.

1. From the Project Homepage (as a Project Manager) navigate to **Project Tools** on the left-hand menu.
2. Click on the **Trade Compliance** item in the Project Tools section.
3. Enter the desired IP or IP range into the field underneath the heading **IP Addresses / Ranges**, ensure **Blocked** is selected, and then click the **Add** button to the right.
4. Continue with this until all of the desired IPs or IP Ranges have been added below.
5. Scroll to the bottom of the page and click on the **Submit** button.

You have successfully blocked an IP or groups of IPs from accessing the Project level of your site.

Unique E-mail Addresses

Connect Communities will now have the option of requiring users to maintain unique E-mail addresses (from all other users) in the system. This functionality is intended to reduce duplicate users and will allow for many future features which were previously not possible. We are recommending that all communities utilize this feature as soon as possible, and will be providing database-level query support to merge existing user accounts.

This functionality is disabled by default. This is due to the fact that legacy data (duplicate E-mail addresses) must be handled (via merging or removing duplicate accounts) first in order to ensure a smooth transition to this new method. While you may choose to enable this functionality at any time, we are recommending that Centercode helps with the transition, including database level merging of user accounts, free of charge. If you would like to use this feature, please contact **Mario Sancho** (mario@centercode.com) to schedule a meeting to plan this transition.

Single Sign-on (SSO) (Enterprise Edition Only)

The Connect External Authentication system has been extended to allow for transparent ("silent") user-authentication from external web sites and user authentication systems. This feature allows users logging into an existing web-site to follow any link to a page or tool in your Connect Implementation, at which point they will be transparently logged in.

How SSO Works

- Connect is configured to replace its local log in screen with a customer-specific log in system.
- User navigates to Connect as normal and Connect redirects the user to the configured customer log in system.
- User logs in via the customer-specific system. That system decides if they have access to the beta system, and if they do then it creates a single-use key and sends the end user along with that key back to Connect.
- Connect verifies the key and receives basic user information from the customer's system, which is used to create or locate a local Connect user account for the end user.
- User enters Connect under the context of the new or existing Connect user account.
- Access within Connect is managed normally, utilizing the Team/Role based access system within Connect.

Configuring SSO

Utilizing Single Sign-On requires a technical understanding of both your own authentication system and ours. If you are interested in utilizing this functionality please contact **Mario Sancho** (mario@centercode.com) and we will provide additional API documentation and support to ensure this feature is implemented and tested correctly.

Quick Feedback Reports

Similar to Tasks and Surveys, entire Feedback Types may be easily built into Reports including all elements of that Feedback Type. These Reports may include a Filter unique to the Feedback Type, offering infinite report capabilities based on the dynamic element of the Feedback Type. Optionally, textual elements (title, description) can be ignored, allowing Reports to only contain chartable elements (severity, priority, category, status, etc).

Generate a Quick Feedback Report

The following steps will allow you to create a Quick Feedback Report, based on an existing Feedback Type.

1. From the Project Homepage (as a Project Manager) navigate to **Project Tools** on the left-hand menu.
2. Click on the **Reports** item in the Project Tools section.
3. Click on the **Create a New Report or Report Element** link under the existing list of saved Reports.
4. Under the Complete Reports heading, click on the **Feedback Type** link.
5. Select the desired Feedback Type by clicking the Radial button to the left of it, then click **Next>>**.
6. Choose from the desired Feedback Element Options and then click **Next>>**.
7. Either leave the Radial button at the default setting (No Filter), or create a Filter to limit the data included in the report, then click **Next>>**.

You have successfully created a Quick Feedback Report.

Simple User Password Admin Reset

Community Managers now have a much simpler mechanism to reset user passwords (and E-mail addresses), accessible from the quick-search menu, and no longer requiring CM's to Assume User Identities in order to change passwords.

Password Reset Notes

- A unique one-time use link is sent to the user, allowing them to change their own password.
- An optional custom note may be sent along with the users reset link.
- This link may be set to expire after a set period of days.
- This may only be accomplished from the Community level by Community Administrators.

Reset a Users Password

The following steps will allow you to trigger a password reset for a User that has forgotten their login credentials.

1. From the Community Homepage (as Community Manager), enter the Username into the Search field in the upper-right of the screen.
2. Once the user list has appeared, click on the **Reset** key icon to the right of the desired User.
3. On the Reset User Password page, ensure that all desired information is correct, and then click the **Submit** button at the bottom of the page once satisfied.

You have successfully reset a Users Password.

Enhanced User Password Self-Reset

The process which allows users to reset their own passwords has been improved for both usability and security. Rather than requiring a secret/question answer pair (which users generally forget, and are often easily guessable) the system will E-mail the user with a time-sensitive link (similar to Admin Reset) which allows them to reset their password. For increased security this self-reset will not be available to Community and Project Manager accounts.

Recover Your Username

The following steps will allow you to recover your Username.

1. From the Login screen, click on the [Having Trouble Logging In?](#) link below the Password field.
2. Click on the [Recover my Username](#) link under the What Do You Need Help With heading.
3. Enter your E-mail Address in the appropriate field, and enter the Anti-Bot Verification, then click [Submit](#).
4. Enter the answer to your Secret Question, and then click [Submit](#).
5. Your Username will be displayed on the screen following, provided you have given all the proper data.

You have successfully recovered your Username.

Reset Your Password

The following steps will allow you to reset your Password.

1. From the Login screen, click on the [Having Trouble Logging In?](#) link below the Password field.
2. Click on the [Reset my Password](#) link under the What Do You Need Help With heading.
3. Enter your Username in the appropriate field, and enter the Anti-Bot Verification, then click [Submit](#).
4. Enter the answer to your Secret Question, and then click [Submit](#).
5. Check your E-mail for an automatic message sent from the system, and follow the [Click here](#) link.
6. On the Update Password page, provide the new Password, and retype to confirm, then click [Update](#).

You have successfully reset your Password.

Cross-Project Survey Templates

Community Surveys may now be saved as Templates which may be utilized within Projects. This allows common Surveys to be made available for use across any number of Projects.

Create a Cross-Project Survey

The following steps will allow you to create a Community Survey template that can be utilized within any Project.

1. From the Community Homepage, navigate to **Community Tools** on the left-hand menu.
2. Next, navigate to **Surveys** on the left-hand menu.
3. Click the **Create a New Survey** link at the bottom of the Survey Management list.
4. Complete Step 1 of Survey Creation, and in the Advanced Options section toward the bottom of the page (you may need to click **Advanced Options**), click the Checkbox next to **Save as Global Template**.
5. Finish creating the Survey as you would any other survey.

Congratulations, you have successfully created a Cross-Project Survey Template, for use within any Project. To load the Template, create a Survey within the desired Project as usual, and select the Template from the drop-down at the top of the page. This will load all the preconfigured Settings and Elements automatically into the Project Survey.

External Common Copy Pages

Connect now includes four special pages which may be edited (via WYSIWYG Editor, optionally including HTML, Images, etc) by Community Managers, which are available to users outside of the authenticated Community/Projects. These are intended to be linked from the login page, as well as sign-ups, recruitments, and other public facing pages. Optionally these pages may be redirected to existing common pages within your company (for example your standard corporate Privacy Policy).

Page	URL
Privacy Policy	www.yourconnectsite.com/privacy/
Terms of Service	www.yourconnectsite.com/tos/
FAQ	www.yourconnectsite.com/faq/
Overview	www.yourconnectsite.com/overview/

Customer Reported Bug Fixes

BUG-1363	Forms containing apostrophes will now display the punctuation correctly in Reports.
BUG-1356	An access issue with the "Create a New Project" link was corrected.
BUG-1353	Feedback Reports based on owned or submitted Teams will now give correct data.
BUG-1346	PDF reports sent in E-mail now contain the correct attachment(s).
BUG-1345	User Merge functionality has been audited and now works correctly with all Connect 9.2 areas.
BUG-1343	Project Profiles can now be edited by any project user with proper access (was only the user that completed it).
BUG-1338	A rare scenario where Wiki Comments did not function was corrected.
BUG-1323	Fixed a visual issue that could occur with the Community Account settings page.
BUG-1309	Survey Quick Report icon string is now being replaced and displayed properly.
BUG-1275	When selecting users by the thousands in User Management, some users will no longer get left out of E-mails.
BUG-1274	A situation where Recruitment creation could error out with only one Team in a Project has been fixed.
BUG-1272	Following a link to a feedback form without access will now display a proper error page.
BUG-1269	Project cloning will now copy External Destination Data Return values.
BUG-1262	Certain Wiki and Forum pages were fixed that could cause User Assume to be lost.
BUG-1211	Generated survey reports no longer unnecessarily trim element descriptions.
BUG-1193	User Merge pages no longer show numbers in place of the User information in some cases.
BUG-1182	File Logs for files on Forms now show the Date Added correctly.

BUG-1178	Date and Time throughout the site has been revamped, and Daylight Savings time is now used when applicable.
BUG-1140	Forum subscription E-mails now contain much more detailed information about Posting and Replying via E-mail.
BUG-1132	Importing Users no longer recognizes unintended spaces in between comma separated values.
BUG-1064	Adding Users by Name to a Project had a key mapping issue fixed.
BUG-1009	An error was corrected when assigning certain combinations of Bulk Distributed Values to Users.
BUG-0933	An error when changing a specific Community Connect Authentication setting has been corrected.
BUG-0900	Emails to Forums which were no longer accessible or locked now have better error handling.
BUG-0868	Multi-byte character support has been added for Cross-Project label creation.
BUG-0779	Watched list will now show the correct Edits and Replies to corresponding items.
BUG-0667	Fixed an issue when creating Release type form elements when no releases existed.
BUG-0658	When searching a single area within the Knowledge Base, Connect will now remember your initial date range setting.
BUG-0619	Wide Rating scales on Forms now correctly space out labels when used.
BUG-0541	Inactive Tasks will now show up in Filters and Views.
BUG-0055	Email posts to inactive forums will now give a proper error message.

Internal Bugs and Small Changes

Project

- The length of the Project name has been increased by 25 characters (64 now).
- Multiple Recruitments will now be listed under a single Recruitment heading in the Project Manager alerts section of the Homepage Overview Tab.
- The Project Summary has been redesigned to provide an improved presentation of project information.
- There is now an "Incomplete Feedback" section of the Overview tab on the Project Homepage which lists any incomplete drafts (Feedback, Surveys, Forums) currently available to the user.
- Project Profile Descriptions are now optional to match most other descriptions throughout Connect.

Recruitments

- Recruitments with Filters resulting in no users will now disable the option to send E-mails.
- Recruitments now default to a wide page layout.
- The Opt-Out Footer option for Recruitment E-mails is now enabled by default.

Users

- User Summary pages will no longer show a Wiki section if the project has no Wikis.
- The User Account activation pages have been visually improved.
- User Summary page performance has been improved.
- An issue when viewing completed User Profiles from the User Summary has been corrected.
- A situation where assuming a user and adjusting their personal settings could cause an error was corrected.
- An issue where a user could potentially remove the Community Manager Team was closed off.
- Wikis are now separated from Forum details on the User Summary pages.
- When adding Rank or Comment to a user, both values are no longer required.

User Forums

- Forum Descriptions are now optional to match most other descriptions throughout Connect.
- When creating a new User Forum within a Project, the Forum will show display on the menu immediately.
- Internal Teams given Moderator access to forums will now be able to delete threads.

Content/Releases

- Release Types and Content Types may now be deleted without deleting their Content/Releases first.

Surveys

- Surveys now default the "Show on Homepage" option to on (consistent with other resources).

Tasks

- Task Lists without Tasks will no longer have a Publish option until at least one Task is added.
- Task Lists may now be deleted without deleting their Tasks first.
- Tasks are now included as a quick search area (previously only in advanced search).
- Complete Task list reports will no longer be available in projects where Task groups but no lists exist.

Feedback

- The left-hand Feedback menu is now displayed when editing Feedback.
- Exported Comment formatting has been adjusted to be easier to read.
- Feedback Linking performance has been improved.
- Duplicating Tips on Feedback Modify page (and other specific conditions) was fixed.

Reporting

- The print view for Pyramid chart types will now print the chart correctly.

Strings

- Default string grammar used throughout Connect is now much more consistent.
- Blank strings have been added which allow HTML Meta tags to be added to the login page.

Mixed Areas

- Colored labels indicate the status (Inactivate, Expired, Pending, Incomplete, etc) of resources (Content, Tasks, Surveys, etc) throughout Connect.
- The new form type creation workflow (Surveys, Feedback, Test Platforms) has been improved with more appropriate next steps and buttons.
- Release element types may not be added to forms (Feedback/Surveys) when no Releases exist.
- The first element of any form will now default to the appropriate Team Type defined access.
- Project and Community Roles have been reordered to be more consistently (based on common access).

Browser Compatibility

- The alignment of icons within table columns has been improved for consistency in Internet Explorer.
- The display of secret questions in Internet Explorer has been visually improved.
- New time zone settings on Profile page now extend out properly when using Internet Explorer
- A visual issue with E-mail Logs in Internet Explorer only was fixed.
- The WYSIWYG Editor has been updated (better Chrome support, various editing fixes)