Centercode June 2014 Release Guide

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Introduction

The long awaited Connect 10 (now simply called "Centercode") is finally here. At more than two years in the making, this is our largest release ever, including more than a hundred brand new features and meaningful enhancements.

With this release we set out to redefine what beta testing can accomplish, offering a more modern and collaborative approach that produces far more actionable results while requiring a smaller time investment to get them.

While we hope you find great value in our new tools, we also know that each of our customers approaches both beta testing and our platform differently, and many are happy with their programs today. Considering this, we made it possible to continue running tests as you always have, adopting only the features and workflows that meet your needs.

This guide offers in-depth details about our exciting new release, focused on major improvements to our Feedback system, user management, and at long last, a mobile interface.

Lastly, what hasn't changed is the high level of support we obsessively strive to offer. As per usual, please feel free to reach out for any questions you may have, or help that you may need.

Thank you for your patience, we hope you enjoy the new release, and look forward to your feedback.

Luke Freiler
CEO @ Centercode
luke@centercode.com

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Intended Audience

This guide is intended for administrators (Community and Project Managers) of the Centercode Beta Test Management Platform (formerly Centercode Connect).

If you're not yet familiar with the Centercode platform, please start at http://welcome.centercode.com.

Release Schedule

We've begun migrating customer implementations to the new release in early June. Enterprise Edition customers will be provided multiple widespread windows to select from June until August, allowing them to select an optimal period in their beta schedule. Project and Program Edition customers will be notified of their scheduled update window at least 5 business days prior to the update. **Updates will require between 30 minutes and 4 hours of scheduled evening downtime** based on the size of the implementation and if they are migrating to our latest server platform.

NOTE: Please reach out to let us know if there is an optimal window for your update, or if you'd like the release sooner than later, as we're working to schedule all updates as conveniently as possible.

Transitioning to the New Release

We've worked hard to ensure that despite the extent of this update the transition is as frictionless as possible. Due to this goal, the majority of the new features are disabled by default, allowing Community and Project Managers to determine when the time is right to transition their implementation and projects to our new functionality.

TRANSITION NOTE: There are virtually no manual updates *required* to migrate to the new Centercode release. That said, when the time is right for you, transitioning to the new features is extremely simple. We recommend a single community change (Enable Avatars, ~1 minute), followed by an optional change per Project (Select Username or Full Name, ~1 minute each). We recommend making the additional changes per Feedback Type (Enabling Access Public Feedback, Predictive Feedback Matching, Feedback Descriptions, New Discussion System, etc.) of your Project Templates immediately, ensuring future projects are all created with these new features in mind. Notes like this throughout this guide will instruct you whenever a transition action is necessary.

The New Platform Name (Centercode ~~Connect~~)

As part of this release, we're officially retiring the previous **Connect** moniker and version numbers, instead referring to the platform simply as **Centercode** (as most of our customers already do) and its release period, with this release being **Centercode June 2014**. As we continue to make this transition you may notice prior references to “Connect” throughout our sites and materials. These will be removed in time.

With this release we are also altering our Edition structure to the following:

- **Standard Edition** - Our basic platform including all basic beta program functionality
- **Impact Edition** - Our advanced platform aimed at automation and advanced beta programs
- **Enterprise Edition** - Our complete feature set, intended for large teams with many beta projects

As with all Centercode licensing changes, our prior customers are in no way impacted by this, and are free to maintain their existing licensing at no extra cost. Previous **Program** and **Enterprise Edition** customers will continue to receive access to all functionality, while prior **Project Edition** will maintain feature parity with the new **Standard Edition.**

Top 10 New Features

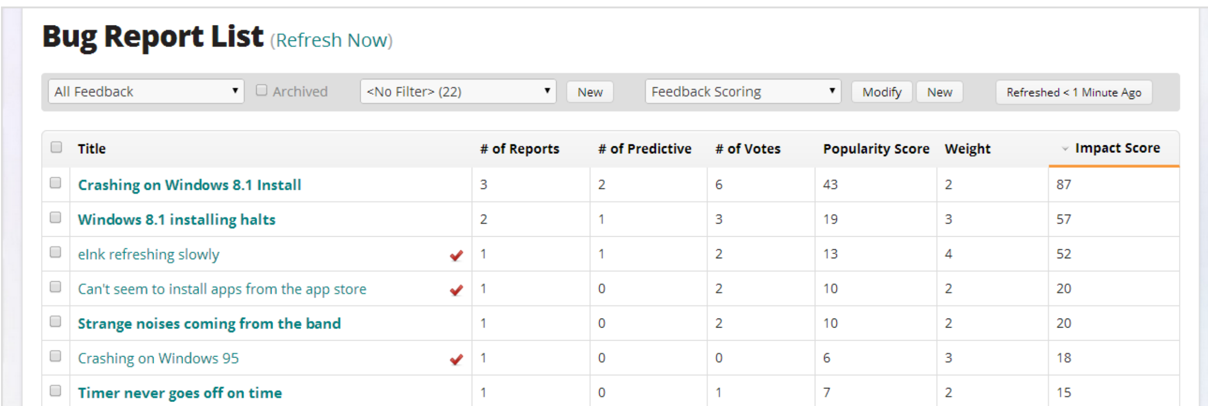
This release includes a diverse array of more than one hundred unique new features and enhancements designed to improve the beta management and testing experience, while opening up entirely new testing scenarios and objectives.

First and foremost, this release focuses on modernizing the entire platform, while greatly improving feedback management and collaborative workflows. The following are selected key highlights of this release.

1. Feedback Scoring (Program, Impact, and Enterprise Editions)

The new **Feedback Impact Analysis** system provides clear context for Feedback, factoring in both the innate traits of the Feedback itself (criticality, category, objectives, difficulty, etc.) as well as its relative popularity amongst participants. When combined with reporting and automation, this provides intelligently prioritized, actionable Feedback including bug reports, suggestions, and discussion topics.

Feedback Scoring in the new Centercode



Bug Report List (Refresh Now)

All Feedback | Archived | <No Filter> (22) | New | Feedback Scoring | Modify | New | Refreshed < 1 Minute Ago

Title	# of Reports	# of Predictive	# of Votes	Popularity Score	Weight	Impact Score
Crashing on Windows 8.1 Install	3	2	6	43	2	87
Windows 8.1 installing halts	2	1	3	19	3	57
eInk refreshing slowly	1	1	2	13	4	52
Can't seem to install apps from the app store	1	0	2	10	2	20
Strange noises coming from the band	1	0	2	10	2	20
Crashing on Windows 95	1	0	0	6	3	18
Timer never goes off on time	1	0	1	7	2	15

2. Feedback Automation (Program, Impact, and Enterprise Editions)

Feedback Macros, **Mass Feedback Modify**, **Scheduled Feedback Macros**, and **Triggered Feedback Macros** open up a variety of new and highly efficient Feedback management capabilities. This is intended to improve workflow, reduce workload, and increase engagement.

3. Mobile Web Interface

The complete participant experience is now optimized for **Android** and **iOS** devices, offering distinct interfaces native to both **Mobile** and **Tablet** devices. This is intended to increase participation by allowing participants to engage with your beta program no matter where they are.

4. Improved Feedback Management

We've revamped the way managing Feedback looks and functions. From the participant perspective, this includes a friendlier and more modern **Simple Feedback List** that incorporates **Avatars**, simple filtering (e.g. **My Submitted**, **My Owned**, **Public Feedback**), quick sorting (**Popular, New, Discussion**) and type-ahead **Quick Searching**.

For internal users our new interface accomplishes far more with fewer clicks, providing a streamlined workflow including the ability to instantly **Take Ownership** of peer owned Feedback. This enhanced workflow reduces workload while increasing participation.

5. Duplicate Feedback Management

We now offer three distinct methods to handle duplicate and shared-sentiment Feedback, including **Voting**, **Predictive Feedback Detection**, and **Similar/Search Detection**. This is intended to provide more actionable and prioritized results, while saving time by centralizing related conversations.

6. Collaborative Discussion Engine

Our new Feedback discussion system includes all of the features of our previous user forum system (**File Attachments**, **E-mail Reply**, **Formatting**, **Quoting**), in addition to new features such as **Avatars**, **Important Comments**, **Improved Notifications**, **Notify Others**, **Comment Searching**, **Moderator Filters**, **Thumbnails**, **Image Light Boxes**, and much more. This is intended to reduce workload while increasing participation and Feedback quality.

7. Expanded Data Engine

We have a number of new data criteria (Views, Filters, Reports, Dynamic Tags, etc.) including access to Feedback Frequency (**Votes**, **Predictive Matches**, **Duplicates**, and **Total Occurrences**), **File Downloads**, and temporal user scoring (**Score This Week**, **Score Last Week**, **Score This Month**, **Score Last Month**). In addition, **Super Filters** (top level filters for User Team Type or Feedback Access Role) make User and Feedback lists easier to manage.

When combined with existing and new automation capabilities, these data criteria open up a wide range of new objectives. This is intended to reduce workload, increase participation, and provide easier access to key information for making better decisions.

8. Discussion Forums = Feedback Engine

Our new Feedback platform is intended to offer a more collaborative experience that shares traits with traditional user discussion forums. This results in a merger of our prior User Forum and Feedback systems, introducing our valuable Feedback Management functionality to the User Forum experience. This introduces a variety of new features to forums including **Custom Fields**, **Workflow**, **External Integrations**, **Ownership**, **Predictive Matching**, **Voting**, **Exporting**, **Reporting**, **Views and Filters**, **Finer Access Control**, and much more. This is intended to provide a more flexible, modern, and “beta” focused experience for forums.

9. Revamped User Management

Our User Management system has been refreshed to match our new Feedback interface, including an enhanced **User Scoring System** and extensive, interactive **User Activity Log**. This is intended to reduce workload and increase participation by ensuring engagement and performance data is more readily accessible and actionable.

10. Feedback Following System

In an effort to simplify monitoring pertinent Feedback, we’ve merged the previous Alerts and Subscription systems into a solitary **Following** system. This offers all users the ability to more easily track Feedback both in site and via e-mail. This is intended to increase participation and Feedback quality by raising visibility of key information.

Depreciated Legacy Features

Given the major advancements of this release, we also wanted to take the opportunity to streamline the platform by defocusing redundant or underused features. With this release there are three prior features that we're officially considering **Legacy**, in addition to one web browser which we will no longer be officially supporting.

What this means is that while we will continue to support these features for the foreseeable future with bug fixes, we will not be continuing active development on them, nor providing access to them for new customers. As such, **we strongly recommend avoiding these features in new projects**.

Legacy User Forums

While User Forums are a popular element of both the Centercode platform and beta testing in general, one of the biggest advancements in our new release is our new hybrid approach to collaborative Feedback that combines our prior Feedback and User Forum systems into a single rich platform that provides the benefits of both. This includes structured Feedback capabilities (custom forms, field level access control, rules-based access control, ownership, workflow, reporting, automation, external integrations, exporting, voting, predictive matching, duplicate management, etc.) and user discussion (syntax formatting, file attachments, avatars, notifications, moderator posts, e-mail replies, etc.). As such, we recommend that the old user forum system be avoided for new projects.

TRANSITION NOTE: With the exception of visual interface enhancements, your prior forums will exist as they did prior to release. Moving forward we suggest you use custom Feedback Types (including the new Public Feedback functionality) as the basis of your User Forums.

Project Wikis

While we had ambitions for collaborative content editing as a function of beta testing, it was simply not a widely adopted feature, and therefore not something we plan to pursue further in the near future. That said, given our focus on collaborative discussion and community driven development, we will likely continue to address this issue with a refreshed strategy in the future.

Project Newsletter

Our Project Newsletter feature was created as an experiment intended to increase user engagement which never really caught on due to a lack of depth and flexibility. Fortunately, other features and practices proved far more effective, so we've elected to sunset this feature to make room for features that better fit our vision.

Internet Explorer 7 Support

With this release we are discontinuing support for Internet Explorer 7 (released in 2006). **We are also strongly discouraging the use of Internet Explorer 8** as it is no longer supported by Microsoft (with the cease of support for Windows XP), and therefore exposed to severe security vulnerabilities. We highly recommend that all users access the Centercode platform with a modern browser such as Chrome, Firefox, or Internet Explorer 11. These browsers provide a much more secure, friendly, and far faster user experience.

Getting Started

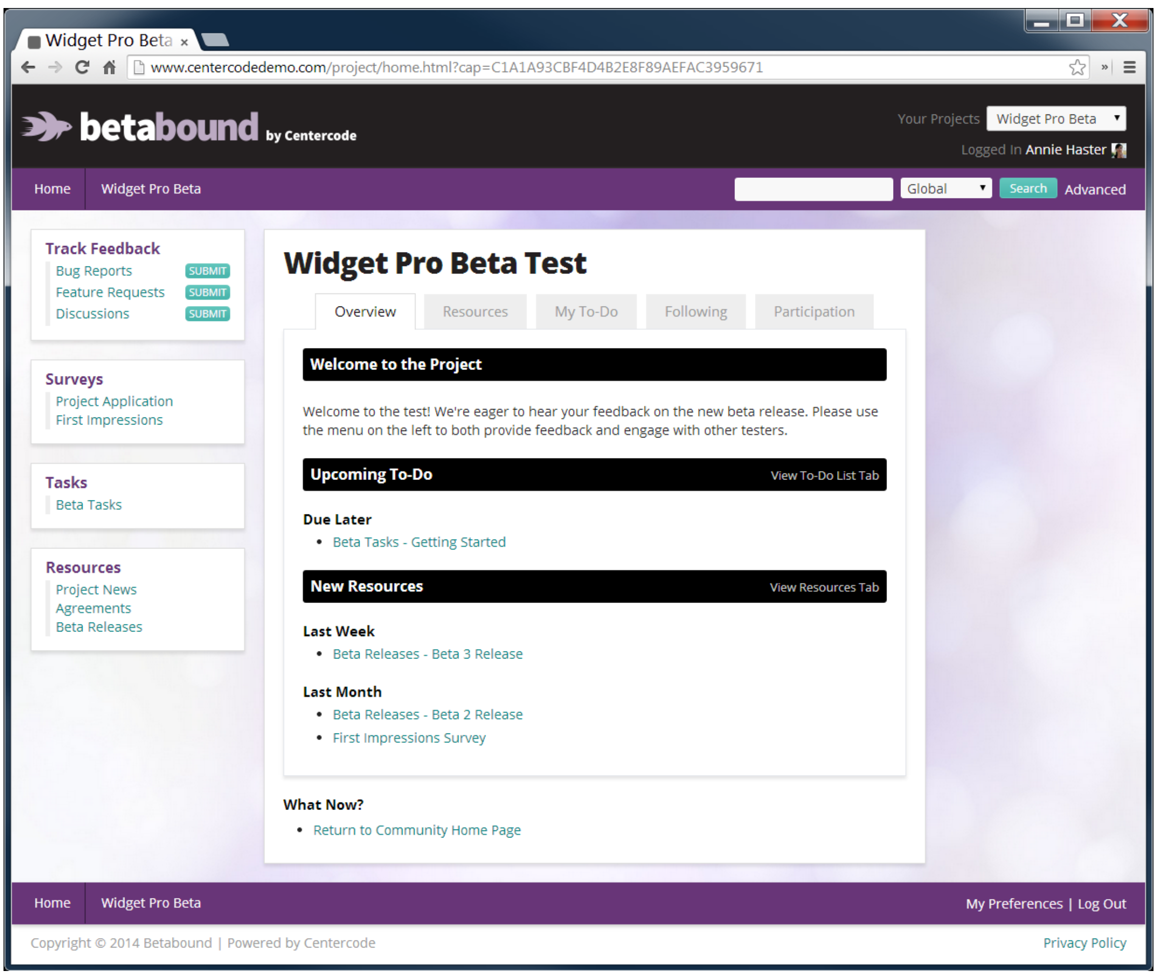
Beyond a more polished aesthetic (both due to the new release and updated custom themes), at first glance your updated implementation will look functionally similar to what you're already accustomed to. This is deliberate, as we've taken numerous steps to reduce release disruption as much as possible. This is critical due to the thousands of live beta tests running across the Centercode platform at any given time.

In addition, this release introduces a series of entirely new ideas and capabilities that likely won't be viable for all Project types, for example Public Feedback, Feedback Voting, and Feedback Automation. For these reasons, we've disabled most new features by default, in an effort to more closely emulate previous releases. This allows you to determine exactly how and when you utilize our new features with minimal disruption to existing projects.

Further, it's important to point out that many areas of the site have functionally changed very little (if at all). This includes systems such as Surveys, Tasks, and Reporting. Similarly, the Community scope (with the exception of Avatars and various Data Engine enhancements) is almost entirely untouched.

The systems that will demonstrate the most obvious differences in both interface and functionality include Feedback Management, User Management, and User Forums.

Centercode Participant Project Homepage



The New Tester Experience

One of the most common questions we receive is, "*How does this release impact my testers*?". Thankfully, despite the major enhancements in this release, the participant experience is deliberately similar to previous releases. While you may choose to announce the update to your community and/or project participants, there is no training required.

Everything your participants need to know about this release can be summarized in a single e-mail or content piece, a sample of which is provided on the following page.

Tester Facing Changes

Visual Upgrade

Nearly all custom themes (as well as the base theme themes) are being refreshed as part of this release. This typically includes slightly larger (and improved) fonts, additional whitespace, improved color schemes, and a generally more modern, polished, and attractive user experience.

Mobile Interface

When accessing the site from a mobile device (tablet or phone), the interface changes dramatically to provide a native experience designed for those devices. This interface also offers a button (in the slide-out menu) which allows the user to switch back to the original desktop UI.

User Avatars

If you choose to enable them, user avatars are now available to users. These are selected from the right-hand tip area of the Community Homepage, and are then displayed in all collaborative areas within projects. Testers are free to change their avatar at any time, and may choose to hide all avatars by disabling **Show User Avatars** from the **My Preferences** link in the bottom right of any page.

Following System

The Project *Watch* tab has been renamed to the contemporary **Following**, and now combines the previous *Subscribe* (e-mail) and *Watch* (homepage list) systems. By default, this tab now focuses on Feedback that has changed since their last visit. Participants can toggle e-mail notifications from this tab, as well as stop following or mark items as read.

Predictive Feedback Match

If enabled, participants will now be presented with the simple "Predictive Feedback Match" interface when submitting new Feedback. This will ask that they type a portion of their intended Feedback title, at which point it will suggest matches out of the current pool of "Public" Feedback, prioritized by similarity and popularity. If a user selects a suggested Feedback as a match, they will be added to the list of Submitters, auto-follow the Feedback, and have access to that Feedback on their "My Submitted Feedback" list.

Simple Feedback List

The new Simple Feedback List provides a more modern and friendly list of user Feedback. This list includes simple filtering, basic sorting, and real-time search-narrowing. This page includes an alternate shrunk view, as well as the ability to (if enabled) interactively Vote for Feedback that they did not submit.

New Feedback View & Discussion Interface

The interface for viewing Feedback has been greatly enhanced. Quick actions for available features (e.g. Following, Voting) are displayed in the left menu, and the new Discussion system appears directly below the Feedback form. This new system provides a more fluid and feature rich experience for participants including avatars, file attachments, markup formatting, and more.

Sample Email to Participants

The following is a sample of what an Email to your participants might look like. Feel free to customize this copy however you see fit. Again, as no training is required, this is completely optional but does represent the new functionality and demonstrates an investment in your beta program.

Hi **Tester XYZ**,

We're pleased to announce a major update to our online beta program. Our updated platform allows us to take a more collaborative approach to testing, allowing you to engage more easily with other testers.

- A sleek new and much more responsive interface
- A complete mobile interface for both phones and tablets
- A great new interface for accessing Feedback
- User avatars to personalize your identity
- An improved collaborative Feedback discussion system
- Feedback Voting!
- An enhanced system for following the Feedback you care about

Thanks,

Company XYZ Beta Team

Your Participants Feedback

It's highly likely that your participants will provide feedback on the new platform as they experience it. Please feel free to send this to us, positive or negative. While we have a direct relationship with our own customers, we know that it's your participants success is crucial to your own, thus we care deeply about their feelings for the platform and always consider their feedback in future releases.

Please send participant (and any other) feedback to c10@centercode.com.

If your participants express an interest in reaching out to us directly, feel free to provide that e-mail address.

The Updated User Interface

A great deal of effort has gone into polishing nearly every aspect of the Centercode interface to provide a more modern and friendly look while still maintaining a core layout familiar to existing users. As with previous releases, every element of our visual design is customizable to meet the needs of our customers.

Existing Custom Theme Upgrades

Given the depth of this release, all existing Custom Themes require additional effort on our part to adhere to our new theming capabilities and features. These upgrades will be made to your theme prior to your upgrade.

As part of this release, we are also offering theme refreshes (**at no cost**) to match updated branding and/or simply provide a fresh look for your beta program. Please don't hesitate to contact c10@centercode.com if you'd like to refresh or enhance your current custom theme in any way.

New Default Base Themes

For customers not utilizing custom themes (Project Edition customers), we've also refreshed our basic theme templates to provide a more modern look and feel. In addition, we're including two new highly requested themes, one of which has a black header (intended for logos that look better on black backgrounds) while the other is dark and angular in nature. These can be selected from within **Visual Theme Management** under **Community Configuration**.

New Theme Capabilities

This release introduces more than 100 new customizable elements, as well as the ability to provide different theme variations based on Team Types (Administrators, Internal Users, etc.) In addition, while the Mobile Interface will inherit basic theme traits, this interface can be customized independently from the desktop theme.

Release Theme Caching Issues (A thing of the past!)

Customers who've been with us for prior releases may recall experiencing browser caching issues that crop up briefly after a release. This was due to theme code from the prior release remaining in client browser cache. This would result in a broken or ugly interface until the browser cache updated which was outside of our control. We have since implemented a theme versioning system that should completely eliminate this issue moving forward.

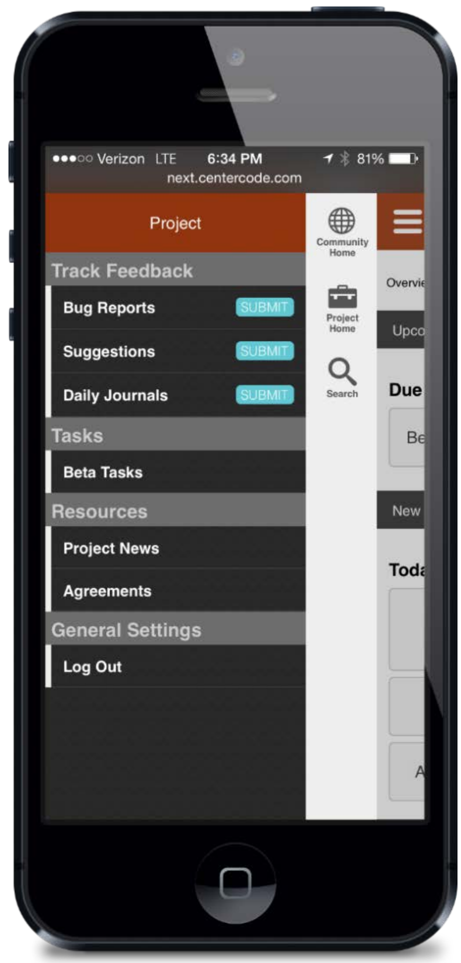
Note: The screenshots used throughout this guide are utilizing our own Betabound theme (which was used to beta test this release). These are not representative of what you will experience in your own implementation, which will closely match your existing theme and corporate branding.

Mobile Interface and Features

The new Centercode platform offers a mobile friendly experience to participants and contributors, optimized for both phone and tablet devices. This new interface encompasses the entire participant experience including:

Mobile Community Features

- Creating a User Account (Signups)
- Creating and managing Test Platforms
- Community Notices
- Community Surveys
- Community Content
- Viewing the Open Opportunity List
- Adjusting Personal Preferences



Mobile Project Features

- Applying for Beta Tests
- Accessing Projects
- Using the Project Homepage
- Knowledge Base Search
- Project Content
- Project Releases
- Downloading Files (Android only)
- Project Notices (Agreements, Distributed Values)
- Project Surveys
- Project Tasks
- Submitting Feedback
- Predictive Feedback Match
- Voting
- Feedback Discussion
- User Forum Discussions

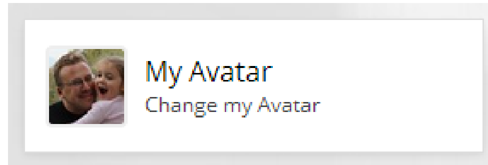
Notes about the Mobile Experience

- At release we are focused on iOS and Android devices (including phones and tablets). We are considering Windows Phone and/or Blackberry support post-release, based on customer demand.
- While the majority of the mobile experience is intended for participants; Feedback and Forum moderation (including Feedback Macros) and discussion are available for internal contributors and managers.
- All of our shared interface elements have been completely redesigned for mobile, including all links, menus, trail navigation bars, searching, etc.
- Initially, we are offering the mobile experience as a highly optimized mobile web interface. Post launch we will be offering native App versions on request.

New Community Features

While the majority of the enhancements in this release reside within the Project scope (specifically addressing Feedback and users), beyond general interface polish and performance enhancements, there are a few key enhancements that exist in both scopes.

User Avatars



User Avatars are a system-wide feature that once enabled, are available to all users. Avatars fit well into the collaborative approach of the new platform, offering users a stronger identity when interacting with other members.

TASK: Enabling User Avatars (Manage Community Comm. Role)

From the Community Configuration menu: (Home > Comm. Tools > Configuration)

1. Select **User Account Settings**
2. Check **Enable User Avatars** under Other Options
3. Click the **Submit** button

Once enabled, users will immediately see the **My Avatar** tip on their Community Homepage.

Selecting Avatars

Once enabled, users will be able to select an image from their local drive via the tip (right) area of their Community Homepage. This system also allows the user to resize and crop the image to their liking. This Avatar icon will then show for that user in conversations throughout the site.

Personal User Avatar Display Option

When Avatars are enabled for a Community, individual users who prefer to hide them from their own interfaces may elect to disable them globally via their **My Preferences** options located in the bottom right of the interface.

Moderating and Auditing Avatars

To complement the new Avatar functionality, we've provided a set of new criteria in our Data Engine that allow you to monitor and moderate User Avatars within your Community and Projects. The new criteria are available under **User Account > Avatars** in Community and Project User Management.

User View & Filter Criteria

- **Avatar** - The avatar image itself (visible in the User List)
- **Small Avatar** - A small (16px) version of their Avatar

View Only Criteria

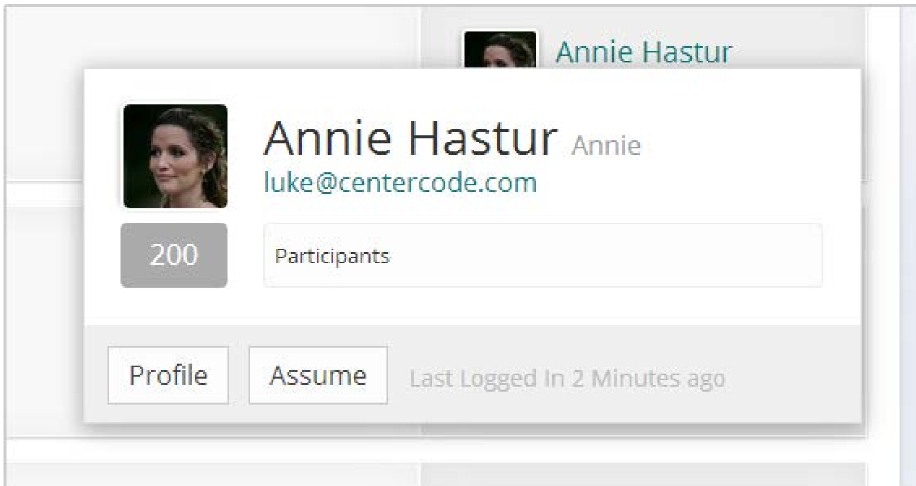
- **Avatar Last Updated** - The most recent date the avatar was updated
- **Has Avatar** - A Boolean (True/False) indicating if the user currently has an Avatar

Due to their inclusion in the **Data Engine**, the new criteria above allow for usage in Dynamic Tags, Reporting, Notice Macros, and User Macros, allowing for creative automation. For example, the **Has Avatar** criteria could be used to display a Content Notice if a user has not yet selected an Avatar.

User Cards

To both compliment User Avatars and make key user information more accessible, we've implemented a new site-wide feature called **User Cards**. These cards popup whenever you hover your mouse over a User Avatar, or if Avatars are unavailable (disabled or not used in a context), the User's name.

Example User Card



User Card Contents

User Cards include the following nine elements:

1. User Avatar Icon
2. Full Name
3. Username
4. E-mail Address - Clicking will open your e-mail client
5. User Score - Community Score in Community, Project Score in Project
6. User Teams - Community Teams in Community, Project Teams in Project
7. Profile button - User Summary link
8. Assume button - Assume User identity action link
9. Last logged in date and time

User Card Availability

The User Card is available to users with the **Manage Users** Role at the Community Level , and users with the **Access User Summaries** Role within Projects. User Cards are never visible to participants.

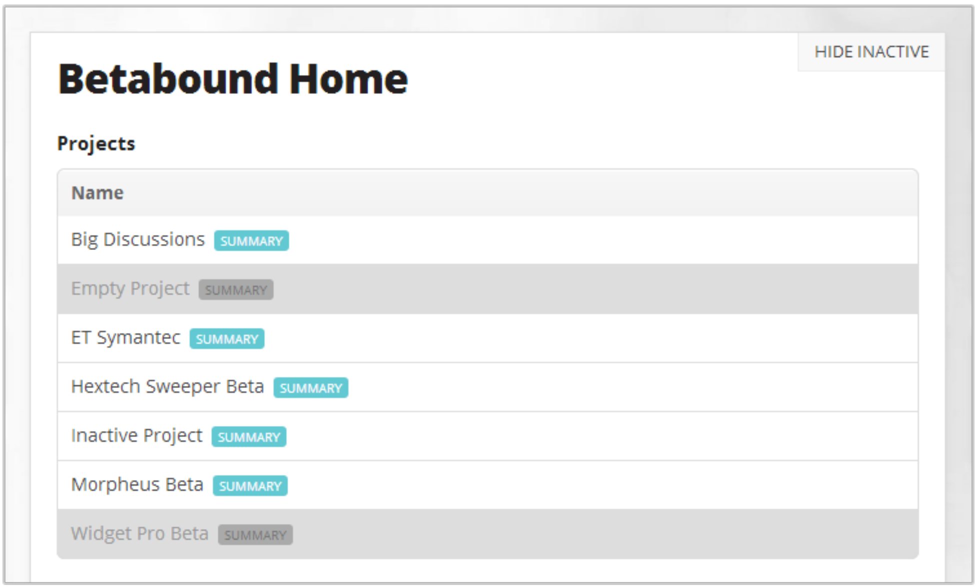
Inactive Project Access

In prior Centercode versions, access to inactive projects was restricted to Project Managers. For this reason many Project Managers choose to open their projects early in order to collect internal Feedback, or leave their projects open indefinitely in order to allow internal contributors to maintain access to historic Feedback and data. This made managing a list of active projects difficult, and detrimental to those customers who were license constrained.

Internal Users can Access Inactive Projects!

We have now removed this restriction, providing access to Archived Projects to all internal (non-member/participant) Teams. In addition, we've added a new toggle to the top right of the Community Homepage that allows users to hide or show the Archived Projects that they have access to.

Project Homepage Project List



New Project Features

While there are many new features in the Project, only one requires modification at the Project Configuration level.

Identify Users by Full Name or User Name

In previous releases we offered granular control of user name display within collaborative areas (e.g. Wikis, Forums). Typically this proved confusing and unnecessary, so we have elected to move this feature higher, appearing as a project wide setting.

TASK: Selecting Username or Full Name Display (Manage Project Proj. Role)

From the Project Settings menu: (Project Home > Project Tools > Project Settings)

1. Select your preference for the **Identify By** drop-down list
2. Click the **Submit** button

At this point all Feedback Types, Forums, and Wikis within the project will all utilize this setting.

Feedback in the New Centercode

The most substantial changes in the new Centercode platform surround Feedback Management. While you are in no way inhibited from running projects as you always have, we now encourage a much more collaborative engagement via a rich set of brand new interconnected features.

In order to understand how Feedback Management has changed, it's important to first understand a number of new concepts being introduced in this release.

A Collaborative Approach

The new Centercode is designed to enable more open and collaborative beta tests than previously possible. By this we don't mean "open" in the sense of a "public" beta test but rather more communication between your selected participants, working together to help you better understand, reproduce, and prioritize their own feedback.

We've accomplished this by providing several systems for intelligently consolidating duplicate feedback, complimented by a much more sophisticated discussion system and leading into powerful new scoring systems which allow you to further understand the **frequency** and ultimately the **impact** of your customer Feedback.

Why is Collaboration Important in Beta Testing?

Unlike QA and other internal processes, beta bug reports, feature requests, and other forms of customer generated feedback typically include a high degree of repetition. In other words - duplicate feedback. Previously, managing this was difficult as feedback was typically siloed - forcing administrators and contributors to monitor, respond to, and manage the same topics and issues in multiple places.

Depending on the product and audience, this could involve spreading the same information ten or more times, with little to no advantage or obvious actionability stemming from the frequency of this feedback.

In some cases this led administrators to rely on discussion forums instead, as open communication was more feasible and they could reach multiple users at once. Unfortunately this lacked structure, and thus became extremely difficult to manage and nearly impossible to harvest significant results from.

The features we're introducing to address this issue are intended to better consolidate information, conversation, and sentiment in an effort to provide a more comprehensive picture of your customer feedback. Once harnessed under this new model, you're able to better understand the frequency, popularity, and ultimately impact of your customer feedback. This in turn enables you make and/or influence better decisions for improving your product.

Important New Feedback Concepts

This release introduces a collection of interconnected Feedback features and concepts designed to work in unison to allow Beta Managers to achieve new objectives and ultimately better understand the value and context of their Feedback. **The ultimate goal of this initiative is to provide more actionable results from beta tests by identifying both frequency and impact**. Understanding the following key concepts and their relationships is crucial to maximizing the capabilities of the new Centercode.

Public Feedback

The first concept to understand in the new Centercode is **Public Feedback**. To do so, it's first important to understand how Feedback access was controlled in previous releases.

In the past, Feedback access was governed by these five core self-evident Feedback Access Roles (FARs):

1. Access Submitted Feedback
2. Access Team Submitted Feedback
3. Access Owned Feedback
4. Access Team Owned Feedback
5. Access All Feedback

Within a Feedback Type, users would have access to all Feedback that matches any of these rules, based on the aggregate of the above Roles assigned to any of their Teams.

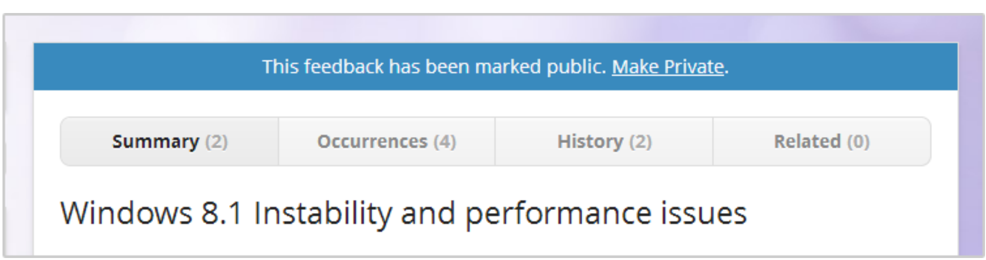
With this design we found that most companies chose to allow their participants to access only their own Feedback, as they could not confidently expose their peers' Feedback.

This release introduces a sixth Feedback Access Role known as **Access Public Feedback**. In addition, the new administrative Role **Mark Public Feedback**. Users with this Role may flag any individual Feedback instance to **Public**, granting access to for users with the Access Public Feedback Role.

The result of this new feature is a more flexible "bucket" of Feedback that allows for granular selection, either manually or automatical,y based on rules.

In other words, you can now select exactly which individual pieces of Feedback your participants can view, opening the door for collaboration amongst both participants and internal contributors, while still reserving other Feedback for one-on-one or internal use.

Public Feedback Notice



TRANSITION NOTE: Public Feedback Roles are disabled by default, both in live and new Feedback Types. We recommend enabling them in your Project Templates if you wish to consistently use them on specific Feedback Types moving forward. Likewise, they can be used in your live projects by simply enabling these new Roles.

Public Feedback Isn't For Everything

Like many features in Centercode, Public Feedback is not optimal for all use cases. For example, a Feedback Type intended to collect Daily Journals from participants would not benefit from Public Feedback, and therefore both associated Roles should be disabled.

Note: Despite the name, Public Feedback is no less secure than any other Feedback in Centercode. The only difference is that you can choose exactly which Feedback people with this Role have access to.

Feedback Occurrences

The next important new concept is **Occurrences**. Occurrences are a measurement of how many times specific Feedback has been given and/or agreed on (i.e. a bug has been experienced, an idea is agreed with). Put simply, occurrences represent "duplicate" Feedback but offer granularity and functionality that goes beyond simply tracking duplicate reports.

Every piece of Feedback now has an Occurrence count which is the sum of 3 values. Each of these values represents a substantial new feature in this release (each is covered in greater depth further in this guide):

1. Reports

Individual pieces of Feedback that have been identified as the same issue, idea, or topic by moderators. Unlike other Occurrence types, Reports include completed Feedback forms.

Tip: The original Feedback submission is included in this number, therefore starting all Occurrences at 1.

2. Predictive Matches

Predictive Matches are Occurrences which self-identified by participants while attempting to submit new Feedback, via the new Predictive Matching system.

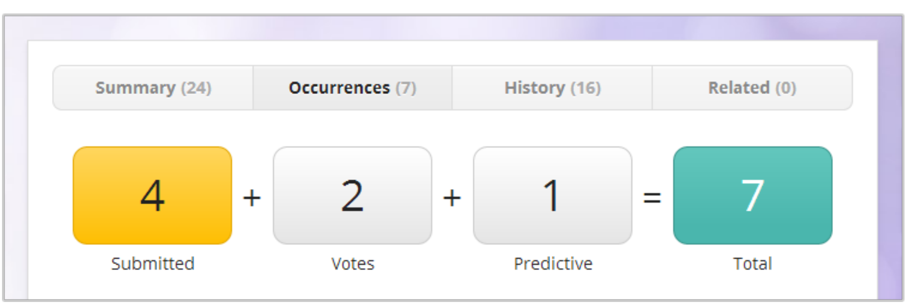
3. Votes

Votes are Occurrences where participants indicated they agree with, like, or have experienced the same issue. The specific sentiment is based on the context of the Feedback Type.

Total Occurrences

While each of these numbers is tracked independently (available in the Feedback Data Engine as well as from the new **Occurrences** tab when viewing Feedback), the rolled up value is displayed most prominently throughout the system. The occurrence count is also the only number ever revealed to participants.

Occurrence Breakdown in Feedback View



TASK: Accessing the Occurrence Breakdown (Moderate Feedback & Comments FB Role)

While viewing any Feedback instance, select the Occurrence Tab (see above).

Feedback Can Now Have Multiple Submitters

Now that duplicate Feedback is combined a single instance, each Feedback instance can now have multiple Submitters. To take advantage of this new change, we've provided new tools to communicate with all of the collected submitters at once as well as tools to view all of the Submitters of an issue from both the Feedback itself and within User Management where you can easily run relevant Macros, create Views, etc.

Popularity Score

As stated, one of the major goals of a more collaborative approach to beta testing is to better understand the frequency and ultimately impact that addressing (or not addressing) specific customer Feedback will have on a product release. The new **Popularity Score** addresses the first half (frequency) of this equation.

By combining the concepts of **Public Feedback** (i.e. making Feedback more accessible to other participants) and **Occurrences** (i.e. centralizing matching Feedback), along with Comments and Viewers, we're able to understand how widespread or popular specific issues, ideas, or topics are likely to be.

These values are rolled up into a value referred to as the **Popularity Score**, which is now available for all Feedback. This value is built into the Data Engine, allowing its use in Feedback lists, Macros, E-mail Templates, and Reports.

TASK: Accessing Popularity Score (Access Advanced Feedback View FB Role)

Wherever Filters or Views are used (Feedback, Reports, Dynamic Tags, etc.):

1. Select the **Feedback Type** Data Set
2. Navigate down to **Score** and select **Popularity Score**

The result of this value will be the Feedback's Popularity Score. Sort by this field in order to see the most popular feedback within the current Filter.

How Popularity Score is Calculated

Each Feedback's Popularity Score is an automatic roll-up of the following values:

Value	Default Weight	Example	Contribution (+)
Reports	5.0	2	10
Predictive Matches	3.0	3	15
Votes	2.0	5	10
Comments	0.5	10	5
Viewers	0.1	20	2
		Popularity Score (Additive)	**42**

Popularity Example

The following example shows the popularity scoring of 4 very unique issues.

Severity	Reports (5)	Predictive (3)	Votes (2)	Comments (0.5)	Viewers (0.1)	Popularity (+)
BUG-001	1 (5)	1 (3)	0 (0)	5 (2.5)	10 (1)	11
BUG-002	1 (5)	0 (0)	0 (0)	2 (1)	2 (0.2)	6
BUG-003	1 (5)	1 (2)	1 (2)	3 (1.5)	6 (0.6)	12
BUG-004	7 (35)	20 (60)	28 (56)	20 (10)	60 (6)	167

Note that according to this list, knowing nothing else about these issues, it's clear that BUG-004 has been experienced by a large number of people (~75), while BUG-002 is an outlier that has only been reported by a single participant.

Popularity Scores Always Round Down

Note that while technically the Popularity Score might result in a decimal (due to non-integer components), the final value is rounded down (i.e. "Floored") to present a whole integer. This requires the lesser sub-integer signals (by default Comments and Views) to be substantial in order to count toward the final score. For example, 3 Viewers would typically be rounded out, while 25 Viewers would add "2" to the final score.

Popularity in Predictive and Duplicate Management

In addition to Data Engine (Views, Filters, Reporting, etc.) capabilities, popularity scoring is used to suggest Feedback in both the Predictive and Duplicate Management systems. Technically these results are a blend of text matches (with points being associated for each string match) and the Popularity score.

Customizing Popularity Scoring Weights

The individual Popularity Score component weights can be adjusted per Feedback Type in **Program**, **Impact**, and **Enterprise Editions**. These custom weights may be stored within Project Templates, allowing companies to develop their own unique ongoing scoring best practices for their beta programs. For other Editions, the default weights listed above will be used.

Tip: You don't have to use all of these weights in a Feedback type to obtain a popularity score. If specific features are omitted (e.g. Voting), that value will simply not be included in the total.

TASK: Customizing Popularity Scoring (Administrate Feedback FB Role)

Navigate to Proj. Home > Proj. Tools > Feedback Types > %Type% > Feedback Collaboration Settings

1. Under **Popularity Scoring**, adjust the individual factor values for each popularity signal
2. Click the **Submit** button

Your adjusted Popularity Scores will be recalculated and available immediately.

Feedback Weight

While the Popularity Score indicates the relative frequency of an issue, Feedback Weight considers the value of the Feedback based on its unique characteristics such as Severity and Category. This is effectively the other half of the equation necessary to identify the ultimate Impact of the Feedback on the product.

Note: Feedback Weight is a component of Feedback Impact Scoring, which is available in the **Program**, **Impact**, and **Enterprise Editions** of the Centercode platform.

Implementing Feedback Weight

Weighing Feedback is accomplished via a new Form Element Item level feature that allows administrators to assign custom decimal based weights to individual **Items** of **Single Choice Elements** (including the system-level **Status** and **Category/Workflow** elements). The multiplicative result of all of the individual values associated with each of these Items on any piece of Feedback will then determine the Feedback Weight for that Feedback.

By default each Feedback Form Element Item will have a weight of **1.0**, which will have no influence on the final Weight value. Adjusting this value up or down (as little as 0.01) will influence the Feedback Weight.

TRANSITION NOTE: Given the context sensitive nature of this feature we are not providing default Weights for any existing projects or Feedback types. In addition, we are not defaulting them in Project Templates. Therefore we suggest that after you become familiar with the concept of Feedback Weights and Impact Scoring, you add custom weights to your Project Templates, in addition to your live Projects. Note that this value is not shown to participants, and is recalculated any time a change is made - therefore you are free to experiment as you see fit with no detrimental effects. In addition, we are offering Impact Analysis consulting as a free service to Program, Impact, and Enterprise customers. Moving forward, new implementations of the Centercode platform will include default Feedback Weight values, which may then be customized based on customer need.

Feedback Weight Example 1: Severity

Consider the following example of a Severity custom Form Element on a Bug Report Feedback Type:

Severity	Custom Weight
Critical	2.00
Major	1.00
Minor	0.50
Cosmetic	0.25

In this basic scenario, **Critical** bugs would be granted additional Weight over any other severity value, with **Major** bugs not influencing the broader Weight Score at all. On the other hand, **Minor** and **Cosmetic** bugs would actually drag the Feedback Weight downward. This is a typical mentality of most beta programs, as all things being equal (and they're not, but we'll address that when we factor in Popularity), **Critical** Bugs are typically more impactful on the product than **Major** bugs, and so on.

Feedback Weight Example 2: Category

To take this example further, let's add an additional custom Weighted Feedback element, Category.

Category	Custom Weight
Installation	1.5
Hardware	2.0
Software	1.0
Documentation	0.5

The weights of these values are much more subjective than those of **Severity**, as they're relative to the specific objectives of each project. In this case, the logic is that the new user experience ("**Installation**") is very important, but **Hardware** bugs are by far the most expensive thing to fix later, therefore should have a dramatic effect on Feedback Weight. **Software** is effectively a baseline, while **Documentation** is the least impactful.

Calculating the Final Feedback Weight

In situations where a single element is offering weight, there is no calculation to be done, as the weight stands alone. As soon as additional weights are added, all of the values are multiplied together in order to offer a final consolidated Feedback Weight. Consider the following example based on the previous two examples:

Example Bugs by Feedback Weight

String (Weight)

ID	Severity	Category	Feedback Weight (*)
BUG-001	Major (1.0)	Installation (1.5)	1.5
BUG-002	Critical (2.0)	Hardware (2.0)	4.0
BUG-003	Major (1.0)	Software (1.0)	1.0
BUG-004	Cosmetic (0.25)	Documentation (0.5)	0.125

In this simplified example, we can see that the issue with the heaviest Weight is BUG-002, which is a **Critical Hardware** issue (a worst case example based on only these values). On the other hand, our lightest issue is BUG-004 which is a **Cosmetic Documentation** issue.

Feedback Weight Example 3: Product Management Tilt

Feedback Weight is not limited to just two custom elements, nor is it limited to only Participant driven data. Given Centercode's element level access control, fields which are not available to participants can be used to influence weight. Consider this example:

PM Tilt	Custom Weight
Essential	5.0
Nice to Have	1.2
Indifferent	1.0
Uninteresting	0.8
Detrimental	0.2

In this example, the **PM Tilt** element is allowing Product Managers to influence Feedback Weight based on their broader vision of the product and its delivery. Note that while this may provide minimal value on its own, when combined with **Popularity Scoring** (resulting in **Impact Score**), customer sentiment is factored into your interpretation of your Feedback. Under that scenario, a feature which may be **Uninteresting** or even seemingly **Detrimental** in the eyes of Product Management may ultimately bubble up to reveal a significant customer desire when compared to other impending features or bug fixes.

A similar example might be an administrator-facing custom element titled "Show Stopper", which included "Yes" weighted at 10, and "No" weighted at 1.0, defaulting to No. In this scenario it would be possible to push a meaningful issue high up the priority list when its traits don't make its importance obvious.

TASK: Configuring Feedback Weighting (Manage Feedback Types Proj. Role)

From the Feedback Form Editor: (Project Home > Project Tools > Feedback Types > %TYPE% > Feedback Form)

1. Click the **Modify** link below the single-choice element you wish to weigh
2. Under the **Advanced Options** section, enable **Use this Element for Impact Analysis**
3. Wait a moment for the interface to refresh, adding a **Weight** column to the **List Items** area
4. Edit an Item, adding a **positive decimal value** (0.01 or above; 1.0 will not influence weight)
5. Click the **Submit** button to save the Form Item
6. Repeat Steps 4-5 for Each Item you wish to influence your Weight
7. Click Submit to save the Form Element
8. Repeat Steps 1-7 for Additional Elements you wish to add Weighting to

At this point your **Feedback Weight** and **Impact Scores** will be recalculated based on these values.

TASK: Accessing Feedback Weight (Access Advanced Feedback View FB Role)

Wherever Filters or Views are used (Feedback, Reports, Dynamic Tags, etc.):

1. Select the **Feedback Type** Data Set
2. Navigate down to **Score** and select **Weight**

The result of this value will be the Feedback's Popularity Score.

Adjusting to Feedback Weight

While the previous examples are simple, they become increasingly more meaningful and useful when collecting hundreds or even thousands of individual pieces of customer Feedback. In addition, there is no hard limit to the number of fields that you can use to adjust weight (although too many may be difficult to balance).

Lastly, given the new Feedback Automation functionality introduced in this release, your weighting system can become as complex as you want it to, growing with your needs, lessons learned, and the sophistication of your beta program.

Once you've setup your Feedback Weight scheme you can adjust it at any time. Doing so will recalculate the Weights of all existing associated Feedback. We recommend that you continue to balance your weights over time, finding the values and ratios that work best for you.

Feedback Impact

While Feedback Weight offers a perspective on the inherent value of each Feedback instance, it is only an indicator of how it fares based on its own innate attributes. In other words, it's focused primarily around **Severity**, but not being adjusted for **Frequency** which is one of the unique and most meaningful differentiators of a beta test versus other tests. This is where Impact Score comes in.

A simple way to describe this concept would be: **Feedback Weight * Popularity Score = Impact Score**.

Understanding Feedback Impact by Example

The following leverages what we've covered under Popularity Score and Feedback Weight to demonstrate:

Example Part 1: Bugs by Feedback Weight

String (Weight)

ID	Severity	Category	Feedback Weight (*)
BUG-001	Major (1.0)	Installation (1.5)	1.5
BUG-002	Critical (2.0)	Hardware (2.0)	4.0
BUG-003	Major (1.0)	Software (1.0)	1.0
BUG-004	Cosmetic (0.25)	Documentation (0.5)	0.125

Revisiting the previous Feedback Weight example, it's clear that BUG-002 is the most severe issue, which makes sense given that it is a worst case issue (Critical Hardware).

Example Part 2: Bugs by Feedback Popularity

Instances (Value)

Severity	Reports (5)	Predictive (3)	Votes (2)	Comments (0.5)	Viewers (0.1)	Popularity (+)
BUG-001	1 (5)	1 (3)	0 (0)	5 (2.5)	10 (1)	11
BUG-002	1 (5)	0 (0)	0 (0)	2 (1)	2 (0.2)	6
BUG-003	1 (5)	1 (2)	1 (2)	3 (1.5)	6 (0.6)	12
BUG-004	7 (35)	20 (60)	28 (56)	20 (10)	60 (6)	167

Revisiting the previous Feedback Popularity example, it's clear that BUG-004 is the most *popular* issue in the eyes of the participants, despite the fact that it's only a Cosmetic Documentation issue (worst case).

Example Part 3: Bugs by Feedback Impact

ID	Popularity	Feedback Weight	Feedback Impact (*)
BUG-001	11	1.5	16
BUG-002	6	4.0	24
BUG-003	12	1	12
BUG-004	167	0.125	20

Putting the two examples together we can see that despite being an outlier, BUG-002 is in fact the most severe issue of the set, which is unsurprising given that it was a worst case weighing scenario. That said, the least impactful (BUG-004) actually ranks second, due to its immense popularity, which puts it just ahead of BUG-001, which while fairly severe (Major, Installation), is a rare outlier. Likewise, BUG-003 (an unpopular major software issue) ranks third.

The Full Math behind Feedback Impact Scoring

Centercode Feedback Impact scoring is based on the following algorithm:

```
Impact Score = Floor(
 (Viewers * Viewer Weight) +
 (Comments * Comment Weight) +
 (Reports * Reports Weight) +
 (Votes * Votes Weight) +
 (Predictive * Predictive Weight)
) * (Custom Element Item ^n Weight)
```

Note that the each of the bold values can be customized on a per Feedback Type basis, and there is no hard limit to the number of custom element items used.

Leveraging Feedback Impact Scoring

Once you've implemented your Feedback Weights (and optionally adjusted Popularity weight factors), you can access Feedback Scores anywhere the Feedback Data Engine is available (Views, Filters, Reports, etc.).

TASK: Accessing Feedback Impact Score (Access Advanced Feedback View FB Role)

Wherever Filters or Views are used (Feedback, Reports, Dynamic Tags, etc.):

1. Select the **Feedback Type** Data Set
2. Navigate down to **Score** and select **Impact Score**

The result of this value will be the Feedback's Impact Score.

Feedback Impact Score Notes

- Feedback Filters greatly enhance the functionality of scoring. For example, you can view the most impactful issues for a specific category, in a specific status, or recently submitted.
- Adding a Grouping to your view allows you to sort within group items. For example, using a Category custom field as a View Group will allow you to sort your Feedback in such a way that you can see the most impactful issues for each Category.
- While Feedback Impact is an excellent gauge, you should still review all Feedback if possible.
- The relative distance between any two impact scores can be very meaningful. For example if the first issue scores 200, the second 190, and the third 40, it's clear that the first two issues are much more impactful than the third and following.

The Future of Popularity, Weight, and Impact Scoring

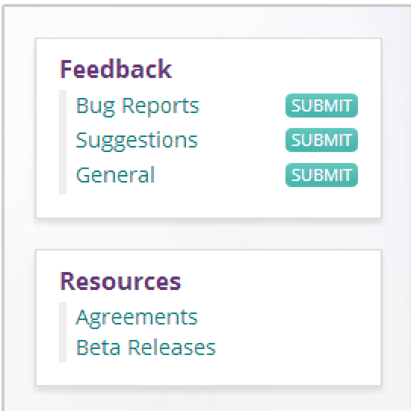
While our goal was to finally provide far more meaningful context for beta feedback, these systems are just the beginning of our ultimate strategy. We're eager to gather customer feedback in order to continue to evolve and grow these systems to further increase their value.

Revamped Feedback Interface

Now that we've covered the conceptual changes and new best practices that we're introducing to Centercode, we can detail the interface changes that enable this functionality. These changes are intended to provide a faster, more modern, friendlier, more functional, and more consistent user interface for both desktop and mobile devices.

Simplified Feedback Menu

In a small but noticeable change, we have merged the Tracking and Submission menus into a single **Feedback** menu. When combined with the new design concept of hosting Discussion Forums within the Feedback Engine, this results in a more clear and concise Feedback Menu.



This change requires no initial effort and will happen automatically for all live projects. If your labels are not optimal, you can change them to better fit by modifying the settings located at **Feedback Type Management** > **%TYPE% Basic Feedback Properties > Tracking Label**.

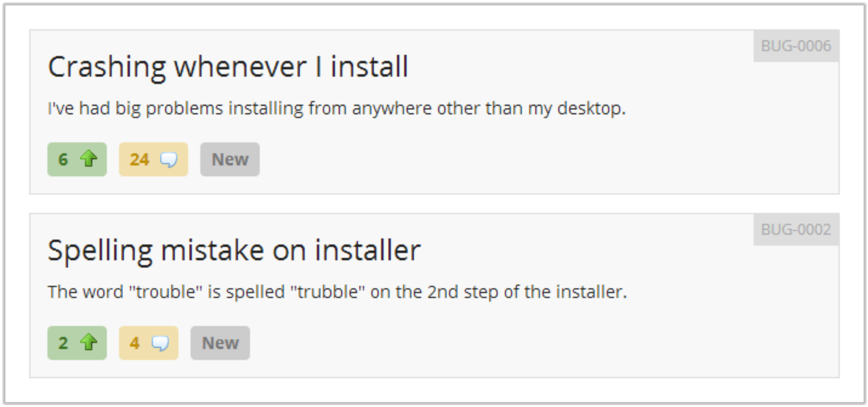
For users who do lack **Submit Feedback** access, the Submit button will be hidden automatically. For those who have the Submit Feedback Role but lack tracking access (i.e. any of the Feedback Access Roles), the **Submission Label** will take the place of the **Tracking Label**.

Note: In an effort to increase interface consistency, the **Submit** menu button is a string which can be changed, but is not customizable per Feedback Type.

Feedback Cards

Feedback Cards, like User Cards, summarize key information (in this case about an individual Feedback instance) in a small consistent space. Unlike User Cards, which are only available to internal users, the contents of Feedback Cards vary slightly based on usage scenario and audience.

Predictive User Card



Feedback Cards are available in Predictive Feedback, Duplicate Feedback, and the Simple Feedback List (all covered in this guide). The Mobile interface uses a slight variation even better fit for small screens.

Feedback Card Contents by Type

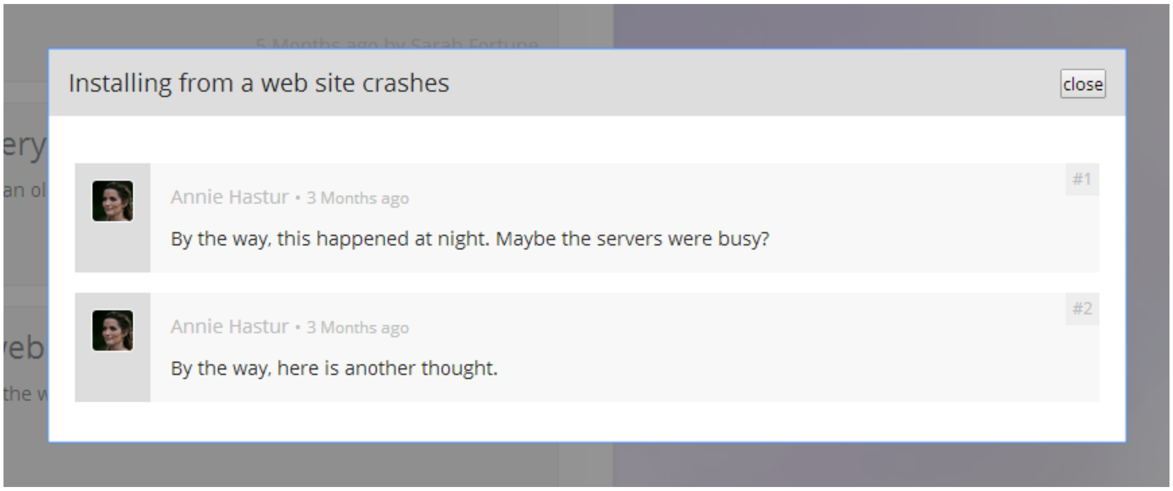
	Predictive	Duplicate Feedback	Simple List
Title Field	•	•	•
Description Field	•	•	•
Total Occurrences	•	•	•
Status	•	•	•
Feedback ID	•	•	•
Total Comments	•	•	•
Recent Comment			•
Submitter		•	•
Submission Date		•	•

Notes about Feedback Cards

- The Description field is designated by a new **Use as Description** option available for Text Elements within Feedback Types (similar to the prior **Use as Title** option, which is used for Title).
- Each Feedback Type may only have one element for each Title and Description. Setting this option when you already have one selected will remove the option from the prior selection.
- The Description area on Feedback Cards will limit itself to a few hundred characters. In this scenario a small icon will be included to allow the user to toggle the complete description.
- Title and Description fields are now created by default (with the appropriate designation) when creating a new Feedback Type (simplifying Feedback Type creation).
- We recommend you add this field within your Project Templates so that future projects will automatically utilize both Title and Description fields.

- The Discussion object on a Feedback Card is interactive. Clicking this number will display a lightbox with those comments, offering additional context for that Feedback.
- The Occurrences object on the Simple List iteration of the Feedback Card is interactive, allowing users to add or remove a Vote.
- Mobile iterations of Feedback Cards are not interactive (e.g. no Discussion popup or Voting). Instead, users can click anywhere on the card to bring up its interaction menu.

Feedback Card Discussion Popup



Feedback Descriptions

As noted above, Feedback Types now have the capability to designate a specific text field as the primary "Description" (similar to the **Use As Title** functionality of previous versions of Centercode) of the Feedback. The contents of this field will be displayed on Feedback Cards, including the Simple Feedback List, and be included in the Quick Search.

TASK: Setting a "Description" Feedback Field (Manage Feedback Types Proj. Role)

From the Feedback Types menu: (Project Home > Project Tools > Feedback Types)

1. Select **Feedback Types** from the Project Tools
2. Select the **Form Icon** (second column) for the Feedback Type you wish to modify
3. Select the **Modify** Link (below) the Element you wish to set as the primary Description
4. Open the Advanced Options, and check the **Use As Description** checkbox
5. Click the **Submit** button

At this point your Feedback Cards will include the contents of this field as their description.

TRANSITION NOTE: Your existing Feedback Types from Projects prior to this release will not have Description fields set by default (as this feature did not exist in prior versions). Feedback Cards will still function properly without a Description field, but we highly recommend selecting a Description field if relevant. Note that new Feedback Types created within this release will automatically include designated Title and Description fields, which you can choose to modify if you see fit.

Predictive Feedback Matching (Program, Impact, and Enterprise Editions)

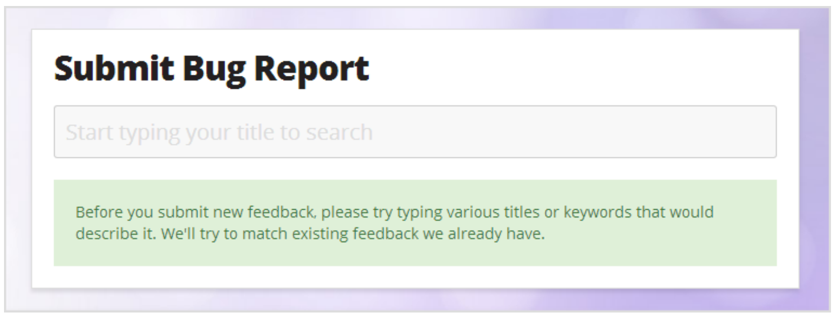
Participants with the **Access Predictive Match** role will now be presented with the simple Predictive Feedback interface whenever they attempt to submit new Feedback.

This interface will suggest that they type a portion of their intended title, at which point it will suggest likely matches out of the current pool of **Public Feedback**, prioritized by a blend of textual similarity and **Popularity Score**.

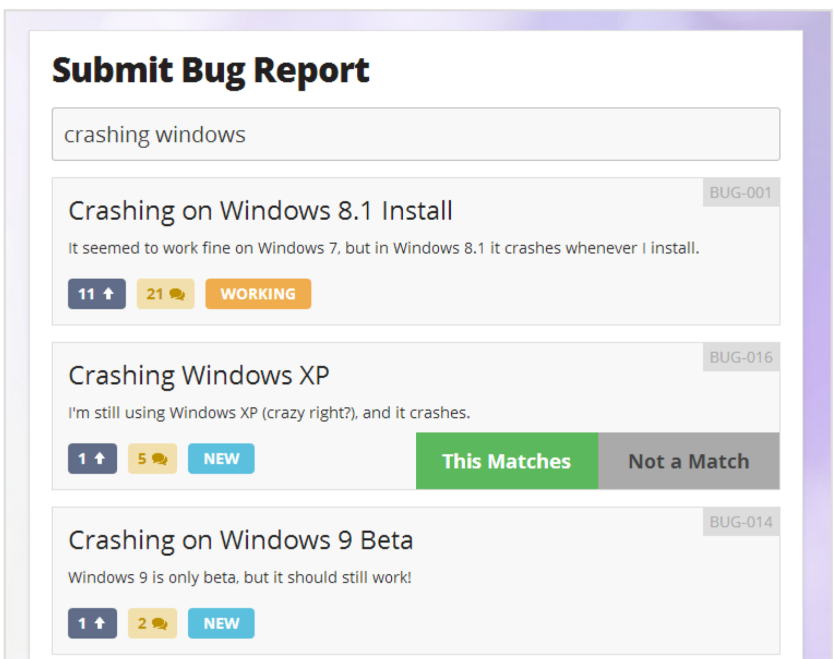
If a user selects a suggested Feedback instance as a match, they will be added to the list of Submitters, auto-follow the Feedback (if enabled in **My Preferences**), and have access to that Feedback on their **Show My Feedback** list.

Predictive Matching enables you reduce workload by decreasing recurring feedback, while simultaneously directing participants to relevant ongoing conversations, workarounds, and/or solutions.

Predictive Matching 1: Instructions



Predictive Matching 2: Suggested Matches



Tip: An excellent use of both Public Feedback and Predictive Matching is seeding a beta project with known issues (possibly including workarounds) prior to accepting tester feedback. Doing so will capture the sentiment (via Occurrences) that these issues are being experienced by participants, while ensuring these testers are available for future discussion on the topic.

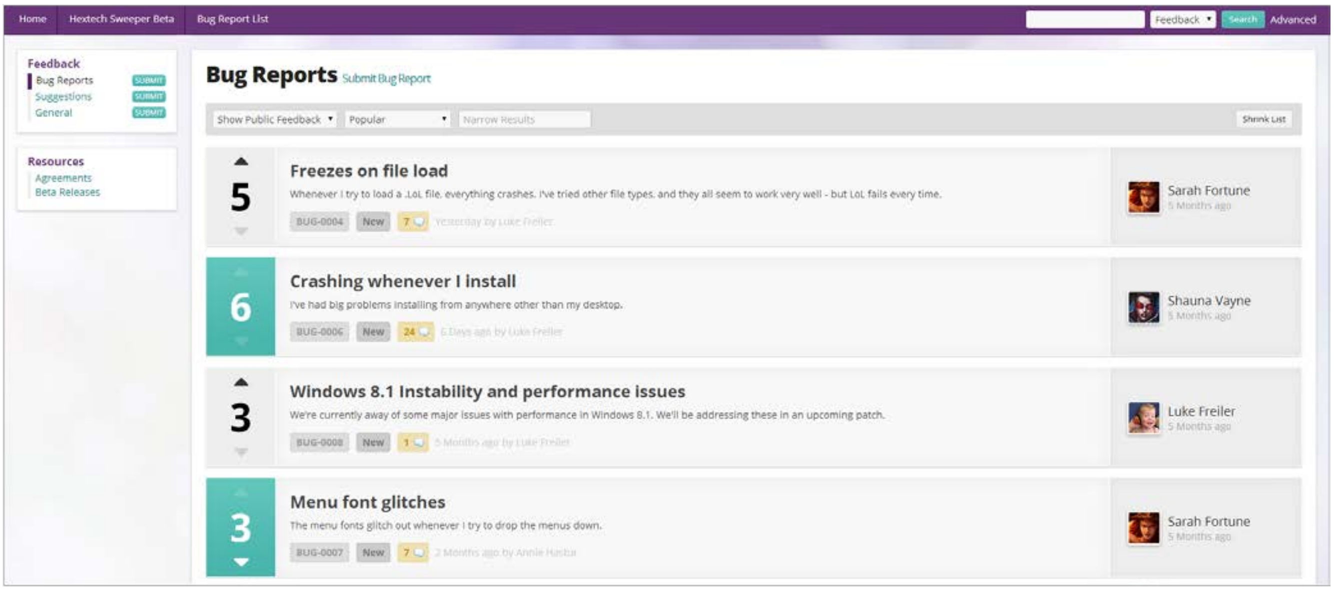
Simple Feedback List

The Simple Feedback List replaces the prior list table (now referred to as **Advanced View**) view with a friendlier interface intended to allow participants to easily monitor and contribute to Feedback.

This interface is intended to provide a more contemporary experience in line with social media and other modern sites, focusing equally on Feedback and the collaborative discussion associated with it.

The use of whitespace surrounding each Feedback Card is intended to enhance readability, but may be removed for preference by clicking the **Shrink List** button in the top right of the Simple Feedback List.

Simple Feedback List (Default View)



Key Features of the Simple List

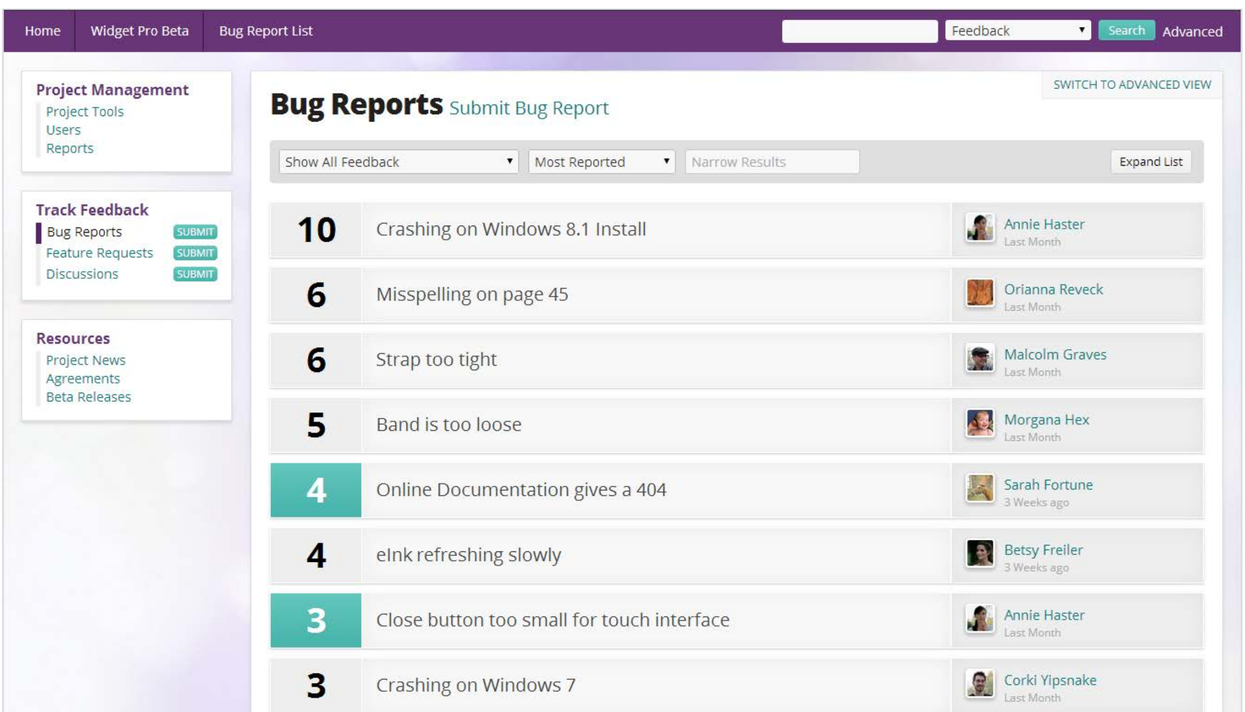
- Uses an elongated version of the shared Feedback Cards to summarize key Feedback details.
- Includes basic filters tied to Feedback Access Roles, allowing users to quickly narrow to Feedback they submitted, Feedback they own, Public Feedback, etc.
- Includes three basic sorting methods: Newest, Recent Comments, and Top (highest **Popularity**).
- Allows for real-time searching (narrowing the list as the user types).
- Includes a link to shrink to a more collapsed view, hiding descriptions and removing whitespace.
- All settings are saved per Feedback Type, maintained on the server between User Sessions.
- Shows current Occurrence count for each issue, with the ability to add a Vote to the occurrence count directly from the list (darkened Occurrence counts above indicate the user has already Voted or Submitted the issue themselves).
- Includes pop-up comments, allowing the user to view discussions without navigating into the issue.
- Includes a link to jump directly to the latest comment.

Additional Notes about the Simple Feedback List

- The simple list ignores the **Archived** state of Feedback (including both Open and Archived Feedback). To remove Archived Feedback from the Simple list, toggle the Public bit. This can be automated via Feedback Automation (e.g. removing Feedback older than a certain age, or older than a certain age with a certain number of occurrences, etc.)
- While the simple list isn't designed specifically for Administrators, it does offer a friendly view to interact with Feedback that some internal users may prefer. For those with access to both views, a convenient link in the top right of the page allows the user to swap between the Simple and Advanced Feedback views. This setting persists with their session.
- Given its limited nature, the Simple Feedback List uses a simpler design, allowing it to perform much faster than the more dynamic advanced lists.
- All users with at least one Feedback Access Role (thus tracking access) have access to the Simple List. The Advanced List is based on the **Access Advanced Feedback View** Feedback Role.

TRANSITION NOTE: This new interface is the single most substantial participant (beta tester, customer) facing change implemented within this release. That said, early Feedback from participants regarding this new experience has been extremely positive with absolutely no training required.

Simple Feedback List (Compressed View)



Advanced Feedback Management View

Our Feedback Management splash page (now dubbed Advanced View) has also received a number of enhancements.

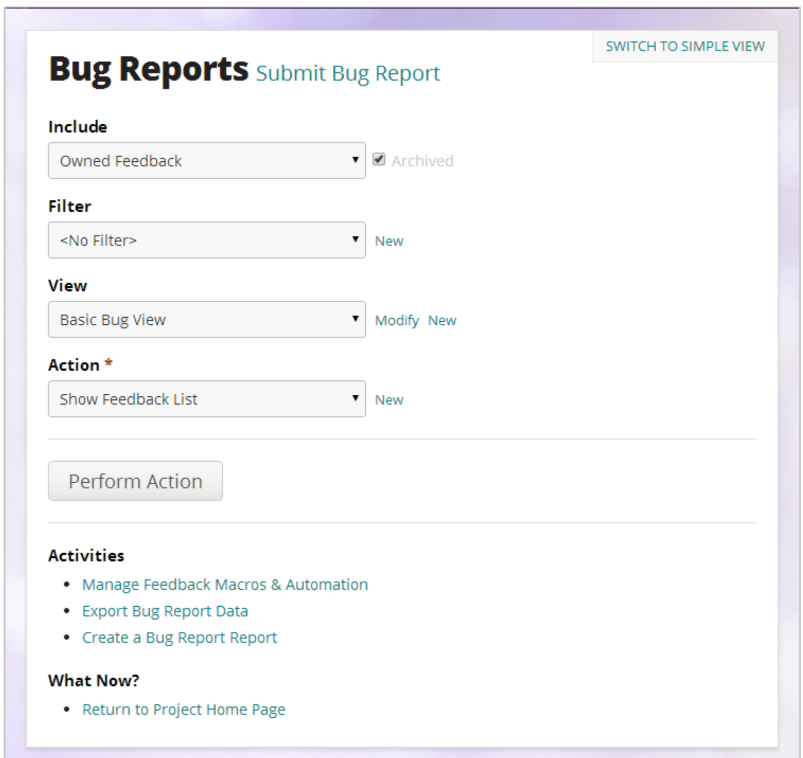
Feedback Splash Enhancements

Include (i.e. "Super Filters")

Previously, users would build Feedback lists via a combination of custom Views (columns) and Filters (rows), resulting in the data table of their choice. While this is still included in the new Centercode, we've added a higher-level filter mechanism that is matched to each available Feedback Access Role, allowing these to be mixed with Views and Filters.

As a result, basic aspects such as Ownership or Submitted no longer need to be included in Filters, as simply selecting **Owned Feedback** or **Submitted Feedback** from the **Include** list will narrow Feedback to these criteria.

New Advanced Feedback Splash Page



Include Archived

Archived Feedback is intended for Feedback which is no longer actively managed, and thus has reached the end of its useful lifecycle. To assist with this intention, we've included a simple **Archived** checkbox, which makes it substantially easier to exclude (or include) archived Feedback in your Feedback lists.

Improved Feedback Data Engine

The Feedback View and Filter Data Sets (aka the Centercode Data Engine) have been overhauled entirely, providing a much more sensible organization that is context aware. In other words, features in a Project (e.g. Surveys or Tasks) will not show up as Data Sets or criteria until at least one of these items exists. This results in a much more relevant and organized list of Data Sets and criteria, simplifying the process of creating and managing Feedback Views and Filters.

Tip: This overhaul applies everywhere the Data Engine is used, including Views, Filters, Dynamic Tags, Reporting, Notice Macros, Feedback Automation, and User Automation.

New Feedback Data Engine Criteria

With the introduction of so many new features in the new Centercode, we've also extended the Data Engine criteria which are available for use throughout things such as Filters, Views, Dynamic Tags, Reporting, Macros, etc. These include:

- # of Occurrences
- # of Votes
- # of Predictive Matches
- # of Duplicates
- # of Followers
- # of Submitter Comments
- # of Current Owner Comments
- # of Moderator Comments
- # of Important Comments
- All Comment Text
- All Important Text
- Last Comment Text
- Last Comment Date
- First comment Date
- Is Public (Yes/No)
- Thread Locked (Yes/No)
- Popularity Score
- Weight (Program, Impact, or Enterprise Edition)
- Impact Score (Program, Impact, or Enterprise Edition)

Feedback List Enhancements

- In the Feedback List view, columns may now be resized by dragging their borders with your mouse.
- In place of View/Edit icons, the left-most column is now always linked directly to the Feedback instance. This is due to the fact that there are no longer discreet View and Edit modes for Feedback, but rather an intelligent interface based on your relationship with that Feedback (Viewer vs. Owner).

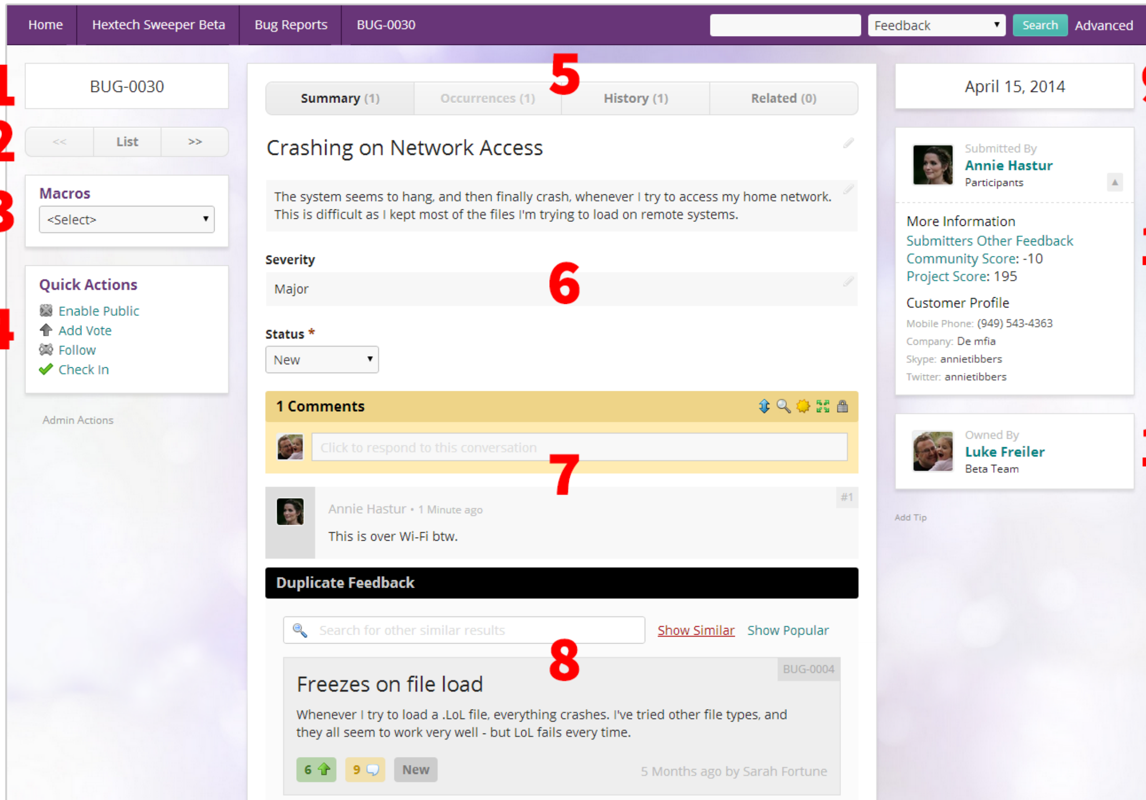
New Feedback View Interface

The interface for viewing and managing Feedback has received a significant overhaul providing a more functional and responsive experience along with access to many of the new features introduced throughout this release.

Updated Moderator Interface

The moderator interface for viewing and modifying Feedback has been completed redesigned.

Moderator Feedback View Interface



1. Feedback ID

The current unique Feedback Identifier

2. Navigation

This allows the user to navigate within their current filter. The **List** button will return the user to their current list (Advanced or Simple). This navigation will not appear if the user did not originate from the list (e.g. linked directly to the Feedback from e-mail, etc.)

3. Quick access to Feedback Macros

This will include all Macros that include the **Show In Feedback Management** option, for the Teams of the current user.

4. Feedback Quick Actions

These actions allow quick interactions with the current piece of Feedback.

- **Enable/Disable Public** - Toggles the **Public** status of the current Feedback. This item requires the **Mark Public** Role for the current Feedback Type Role. **See Setting Feedback Public**.
- **Add/Remove Vote** - Dynamic text defined in the **Feedback Collaboration Settings** which allows the user to add or remove a vote. Votes may also be added from the top center of this page for end-users (utilizing the

Voting Header Label option in **Feedback Collaboration Settings**). This item requires the **Vote on Feedback** for the current Feedback Type.

- **Follow/Stop Following** - Adds the Feedback to the current users Follow list/page.
- **Check In/Check out/Take Ownership**. Allows the user to (1) Check in if they're the owner, (2) Check out if they're on the Owned Team but there is no Owner; or (3) Take ownership from the current owner, if they are on that Owners Team.

5. Moderator Feedback Bar

This bar offers Feedback Moderators alternate views to access additional details about this Feedback.

A. **Summary (Comment Count)** - The current view, including the Feedback itself, discussion, and duplicate Feedback system.

B. **Occurrences (Total Occurrence Count)** - The list of all occurrences broken down by Submissions, Predictive Matches, and Votes. Occurrences will be covered in greater detail later.

C. **History (Total Edits)** - A history of all changes along with Feedback details including Total Views, Edits, First and Last Views, First and Last Modifiers, etc.

D. **Related (Total Links)** - A list of related (but not duplicate) Feedback, including other Feedback Types and Surveys.

6. Feedback Content

This area hosts the user Feedback itself, including all custom fields. **See Modifying Feedback**.

7. Feedback Discussion

The comments and discussion associated with the current Feedback. This area requires the **View Comments** Role for this Feedback Type. **See Discussion Engine**.

8. Duplicate Feedback

This interface allows owners to identify existing Feedback. This area requires the **Moderate Duplicate Feedback** Role for this Feedback Type. **See Duplicate Feedback Management**.

9. Submission Date

The date this Feedback was originally submitted (using the users Static or Relative Date setting, found in My Preferences).

10. Submitter Information

This area details information about the submitter, including their Avatar, Name (based on Project Name Display Setting), and the team context in which they submitted this Feedback. Clicking the small Triangle icon in the lower left of this tip expands this area to reveal more information including:

A. A link to other Feedback (of all types) by this user.
B. The Submitters Community Score
C. The Submitters Project Score
D. Selected fields with the **Use In Summary** option enabled in Community User Profiles. This allows for quick access to information such as employer, phone number, Twitter handle, etc.

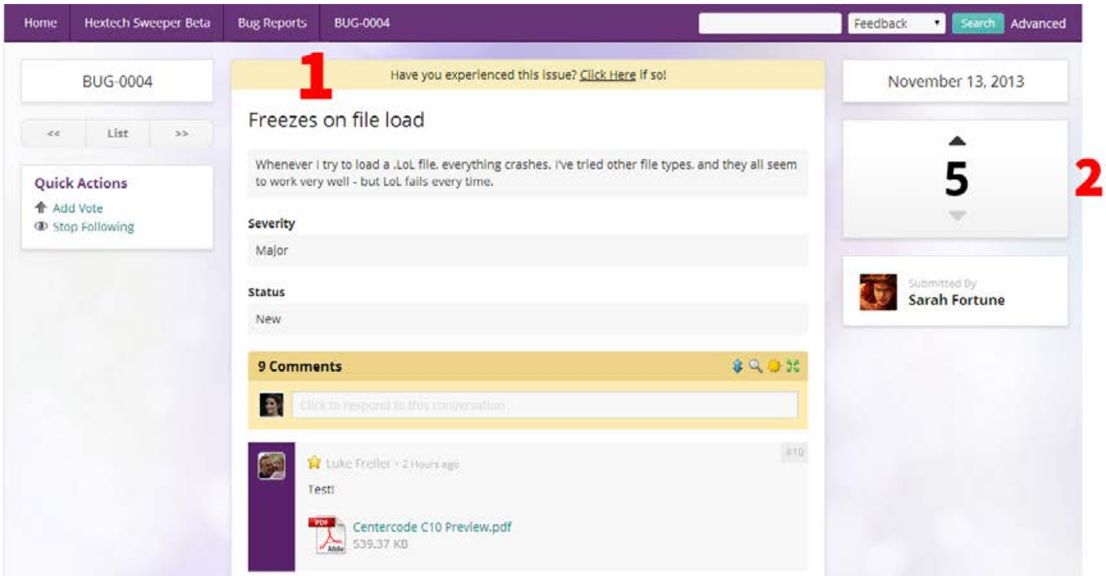
11. Owner Information

The Avatar, Name, and Team context of the current owner.

Participant Feedback View Interface

The end-user experience for viewing Feedback is a simplified version of the moderator experience. The following are unique to the end-user experience.

Participant Feedback View Interface



1. Voting Header

This bar encourages the user to Vote for this Feedback. The label is defined via the **Voting Header Label** option found in Feedback Collaboration Settings. This area also requires the **Vote on Feedback** for the current Feedback Type.

2. Occurrence Count

This interactive area mimics the left-hand column of the Simple Feedback List, allowing the user to add or remove a Vote based on their context. Note that if the user is the submitter (or submitted Feedback which was deemed a duplicate), this will count as an Occurrence, and not allow them to add or remove a Vote. If the user has not submitted a duplicate, but has voted, they can use this Interface to remove their vote.

Note: While this view represents Viewing Feedback, the interface for submitting Feedback is virtually identical to previous releases, with the exception that the title field is focused via slightly larger text.

Modifying Feedback

While submitting Feedback is virtually unchanged (i.e. simple web forms) from prior releases, viewing and modifying it have been improved drastically.

Modifying Feedback in Previous Releases (View vs. Modify)

In prior releases, there was a distinct separation between the concepts of Viewing and Modifying Feedback. Viewing Feedback was available to anyone with access to the Feedback, while Modifying was restricted to the Owner, and required entering the Feedback via a separate path (i.e. the "Edit" button in the Feedback List).

If the Feedback was not owned by an individual, then so long as the user was on the appropriate team (Feedback always belongs to a Team), they could "Check Out" the Feedback, taking ownership. If another user already owned it, they would be required to (manually, outside of the system) request the Feedback be "Checked In", so they could check it out. Alternatively they could turn to Administrative control and manually break the Feedback away from its workflow, thus forcing their own ownership.

Modifying Feedback in the New Release ("Owners View")

There are no longer distinct View and Modify modes, nor the need to choose between them. Whether accessed from the Simple or Advanced lists, Feedback will be displayed intelligently based on the user's relationship with that Feedback.

Non-owners viewing the issue will always utilize View mode, where Comments may be added to the discussion (if they possess the **Post Comments** Role), but editing is not possible.

Owners will enter the interactive **Owners View** interface. Under this context any data which was provided by the Submitter (Title, Description, etc.) will appear as static labels by default. Clicking on these fields will instantly toggle them into form elements, allowing editing. Fields which were not completed by the Submitter will default to form elements.

This design is based on the fact that typically moderators do not directly modify the Feedback submitted by a customer, but rather append to it and/or participate in discussion surrounding it. With this in mind, this design focuses the viewer on the information they're likely to change, while still providing access to make additional modifications if necessary.

Where is the Submit Button?

By default when viewing owned Feedback, a Submit button is not displayed. This will immediately change when modification has been made. In addition to revealing the Submit button, the discussion interface will also be displayed, allowing the user to optionally submit a comment with their modification.

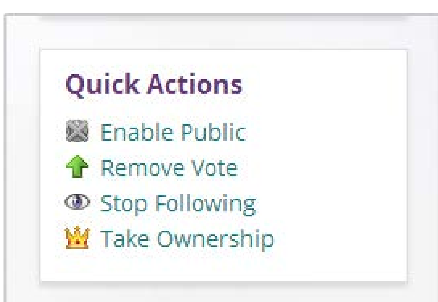
Submit and Next Workflow

Lastly, if the user navigated to the issue from a list, a **Submit and Next** button will allow them to submit their change and automatically move directly to the next issue within in their current Filter. This is designed to provide a smooth workflow for triaging issues.

Tip: The **Submit and Next** button will not appear if you were linked the issue directly (e.g. not from a list), or if you are at the end of your current Feedback Filter.

Taking Ownership

If another user currently owns the issue, but the current user is on the appropriate team, they can now click the **Take Ownership** button to directly transfer ownership to themselves. This allows for more fluid movement of Feedback between internal contributors who are members of the associated teams.



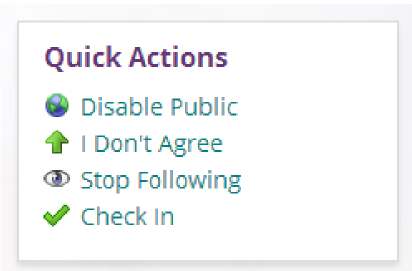
Setting Feedback Public

There are 4 ways to set Feedback as Public. This Feedback will then be available to all users with the **Access Public Feedback** Role, as well as within **Predictive Match** searches.

Note: A user does not require both the Access Public Feedback Role and Predictive Match to use the Predictive Match interface. This system searches all Public Feedback regardless of the users access to the Access Public Feedback Role.

1. Quick Menu (Viewing Feedback)

The simplest way to set Feedback is to use the new Feedback **Quick Menu**. This is an instant toggle available to users with the **Mark Public Feedback** Role.



Once toggled, the Feedback will be available within **Predictive Feedback Management** (covered later) and on the **Simple Feedback List** (covered later) for those with the Access Public Feedback FAR.

2. Set All Feedback Public by Default (Feedback Collaboration Settings)

Enabling this option will make all Feedback within a specific type Public by default. While the Public flag can be manually removed, the general idea is that this Feedback Type will be openly accessible for collaboration. This setting will likely be used for Feedback Types such as Feature Requests and Discussion Forums (which will be covered in more detail later).

3. Set Duplicate Feedback Public by Default (Feedback Collaboration Settings)

Enabling this option will automatically mark any Feedback that has been manually deemed a duplicate (covered later) as Public. This is leveraging the idea that once Feedback has been proven to be a duplicate (i.e. manually triaged), it is a more efficient workflow to start marking additional instances of this Feedback as duplicates automatically via Predictive Feedback Management and the Simple Feedback List (with the Public FAR enabled). This setting will likely be used for Feedback Types such as Bug Reports.

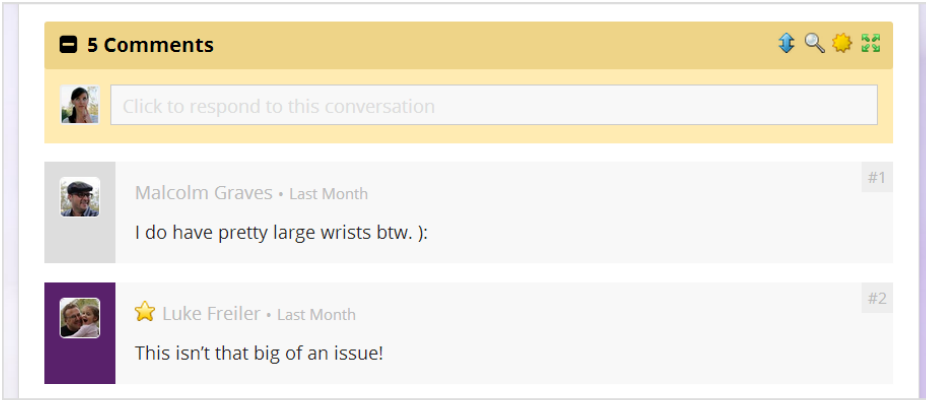
4. Feedback Macro / Feedback Automation

The most flexible method of controlling Public Feedback is via Centercode's new **Feedback Automation** capabilities, which will be discussed in detail later. Through this method Feedback may be set to public based on matching Filters, set in bulk, adjusted in Feedback Macros, etc.

Discussion Engine (New Feedback Comments)

The new Centercode release completely revamps the way discussion is handled on Feedback by adding and improving on the systems which previously powered our prior User Forum system. This new system (dubbed the "Discussion Engine") offers a slew of new features as well as a completely new visual design.

New Discussion / Comment Interface



Enabling and Controlling Discussion Access

Unlike previous releases where Comment Block form elements were used to add discussion capabilities to a Feedback form, each Feedback Type now includes a single static Discussion thread feature, which can be enabled for applicable Teams via the new **Add Comments** and **View Comments** Feedback Type Roles.

Note that a new single **Moderate Feedback and Comments** Feedback Type Role controls access to both Feedback management and comment moderation capabilities.

Similar to previous releases, Comments may be added by anyone able to view the Feedback, with the **Add Comments** Feedback Type Role enabled. You do not have to an owner (thus editing) to Add comments.

What about Internal Discussion and Notes?

The previous Comment Block form element type has been renamed to **Notes Field**, and is suggested to be used for internal discussion (as you have granular access control over each individual Notes Field form element). To do so, simply add this element type to your Feedback Form, setting Team access accordingly. Note that Element Level Access must be enabled for the Feedback Form to allow this.

TRANSITION NOTE: Feedback Types from Projects created prior to this release will continue to utilize your existing Comment Blocks. This is intended to reduce disruption, allowing you to enable the new Comment system as you see fit (typically with new Projects and existing Project Templates). Note that enabling this feature will not convert previous blocks (as you may have multiple blocks), but rather start a blank thread.

New Discussion Engine Features

The discussion engine includes a slew of new features intended to increase collaborative capabilities.

End User Discussion Features

Testers have a highly responsive streamlined interface for contributing comments.

New Participant Comment Interface

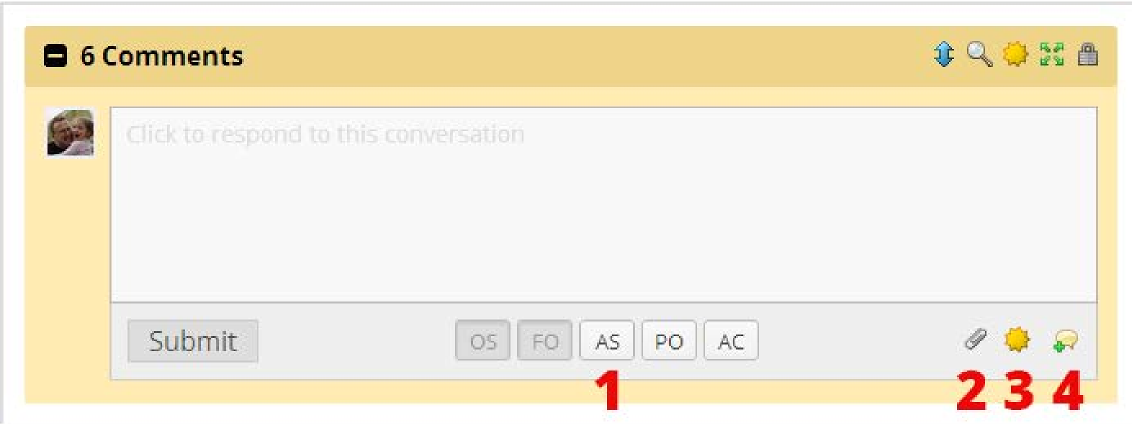
Feedback Discussion Features

- **File Attachments** - A long requested feature, files may now be attached to comments (as opposed to only file attachment blocks on Feedback Forms). This means that non-owners can finally add files. In addition, image files are displayed as thumbnails which expand to light-boxes when clicked. Non-images display icons based on their type along with the file size.
- **Auto-Subscribing** - Users may elect to receive e-mail notifications of posts which come after their own. This is based on a My Preferences option).
- **E-mail Reply** - Users may reply directly to notifications via their e-mail client. Their responses will be parsed and added as new comments within the system. Note that this feature requires POP e-mail settings be configured at the community level.
- **Formatting** - Users may use Markdown or BBCode (based on their My Preferences option) to format their posts. Note that WYSIWYG (visual) editing is slated for our next release.
- **Avatars** - User Avatars are displayed alongside their posts.
- **Quoting** - Users may quote previous posts, adding visual quote-locks to provide reference.
- **Comment Numbers** - Each comment now includes a static reference number (in the top right of the post) that allows users to reference posts by number.
- **Moderator Posts** - Posts made by moderators are now visually indicated with both an icon and unique theme specified color (purple in the screenshots used in this guide).

Moderator Features

In addition to the features available to end-users, Feedback Moderators have a number of new features available to help manage discussion.

New Administrator Comment Interface



1. Push Notification Block

These buttons allow the moderator to push this message to users currently related to this Feedback. Note that if users are already subscribed (via Auto-Follow), the icon will be default pressed, both making the moderator aware and saving them the time of pushing it manually.

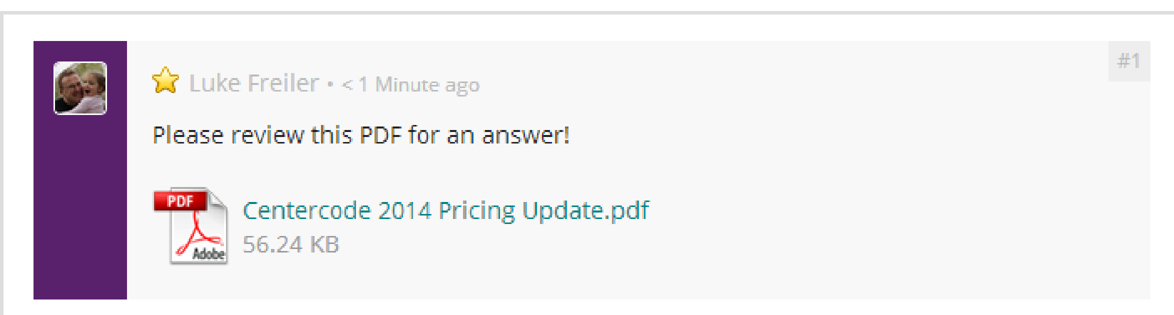
This block includes the following Push Notification Targets:

- **OS (Original Submitter)** - The individual who submitted the original Feedback.
- **FO (Feedback Owner)** - The current owner of the Feedback.
- **AS (All Submitters)** - All submitters of the Feedback, including predictive, duplicates, and voters.
- **PO (Previous Owners)** - All users who have owned this Feedback at some point.
- **AC (All Commenters)** - All users who have commented on this Feedback.

2. File Attachment

This button allows attachment of files (also exists for non-moderators). Note that the Allow File Attachments Collaborative Feedback option must be enabled for this button to appear.

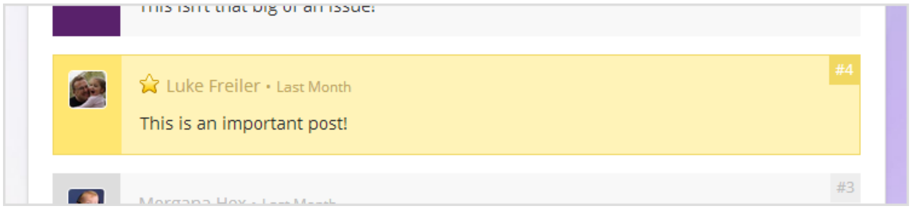
Moderator Comment with File Attachment



3. Mark Comment Important

This button allows the moderator to indicate that this specific comment is **Important**, and thus automatically notifies all users associated (i.e. auto-presses all of the notification buttons). In addition this post will be visually marked separately from other posts.

An "Important" Flagged Feedback Comment



Important Comments are intended to indicate milestones in the conversation that may be important to all associated parties. This might include announcements such as a bug workaround, a request for regression, or the fact that a feature has been implemented or added to the roadmap.

4. Notify Others

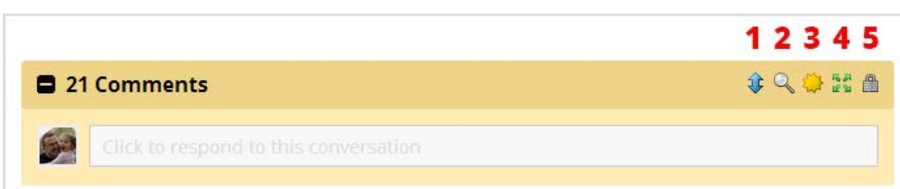
The new Discussion Engine now allows you to bring additional users (who have access to this Feedback) into the conversation who may not have any way yet interacted with the Feedback. This can be done by typing a portion of their full name, username, or e-mail address.

Notifying "Other" Users of a Feedback Comment

Discussion Thread Tools

A set of new tools have been made available to help manage ongoing discussion threads.

Feedback Discussion Thread Tool Interface



Based on the image above, the new discussion tools are:

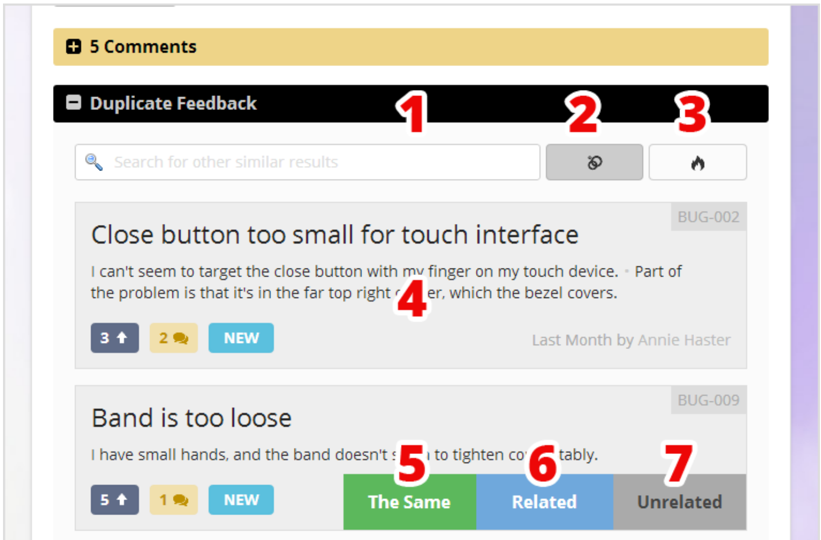
1. **Sort Order** - Change comment sort order
2. **Search Thread** - Search within the current discussion thread
3. **Moderator Posts** - Show only Moderator and Important posts
4. **Print View** - Expand to new browser tab
5. **Lock Thread** - Disable posting (available to Moderators only)

Duplicate Feedback Management

When viewing Feedback as its **Owner**, a new Duplicate Feedback tool allows users to identify previous Feedback instances which are the same as the current one they are viewing, thus setting the current Feedback as a child (known as a "Report") of the original.

This new interface offers three efficient methods to find duplicate issues (Similar, Search, and Most Popular), as well as the ability to set issues as related (but not duplicate).

Duplicate Feedback Management Interface



Duplicate Management Features

1. Search Feedback

This allows the Feedback owner to search other Feedback by ID, Title, Description, or Submitter Name. This is useful when you've seen an issue so often you know its ID or name, or worked with it recently.

2. Similar Feedback

This is the default state of this list, highlighting issues based on a blend of Popularity Score and text match. Note that while this is similar in function to Predictive Matching, it has two major advantages:

A. Similar Duplicate Matching is not limited to Public Feedback, searching all available Feedback.

B. Whereas Predictive Feedback leverages the title and keywords as the user types them, Similar Duplicate Matching has the title, description, and optionally other words of both the source and the target, providing a much larger opportunity to find similarities.

3. Most Popular Feedback

This button reveals the most popular Feedback of this type based on Popularity Score. This is useful when you see the same issue repeatedly, and have an idea of where it stands in the most popular issues.

4. Duplicate Feedback Card

This is a summary of the Feedback which is likely to be a match.

5. The Same (Create Duplicate)

This button bar reveals as the mouse is hovered over any of the Feedback Cards in these lists. Clicking this button will make the current issue a duplicate of the one that this Feedback Card represents. See **Creating Duplicates** for additional information about this function. This action will confirm before committing.

6. Related Feedback (Add Link)

Clicking this button will offer the ability to provide a note regarding the relationship between the two pieces of Feedback. This link and note will be bi-directional, displayed in the top right Related tab. Note that this utilizes the legacy Related Feedback system that existed prior to this release.

7. Unrelated Feedbacks

Clicking this button will minimize this Feedback Card, focusing attention on other Feedback Cards. Note that this is purely a visual tool (the setting is not saved).

Creating Duplicate Feedback

When "The Same" button is clicked on the Feedback Card, the current Feedback is set as a child of the Feedback represented by the card. Behind the scenes a number of actions take place:

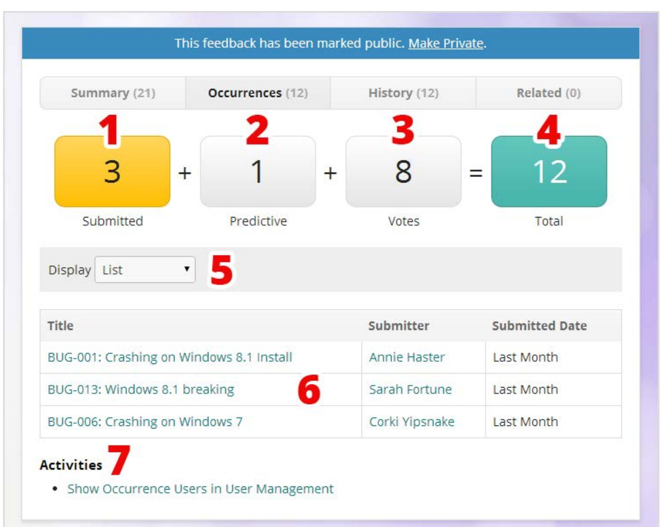
- The current issue is put into a special duplicate state. From this point on it will only appear within the occurrences tab of its parent (the original issue). Duplicates do not appear in Feedback Lists.
- An e-mail is sent to the Submitter of the child issue (which is becoming a duplicate) that explains that their issue has been marked a Duplicate, notifying them of the original (and now primary) issue. This original issue will now be available in their Feedback lists (they are a Submitter).
- Any existing Occurrences and Submitters are added to the parent (including the original).
- Attempts to access the original (now Duplicate Feedback) will redirect to the parent. A gray info bar on the top of the Feedback View interface will explain the redirect.
- Due to context, Discussion threads are not carried over. These remain accessible by administrators from within the Occurrences tab.

IMPORTANT: When setting a feedback instance as a duplicate, the source feedback (the one being viewed, usually the newest report) becomes a child of the target feedback (the original, typically the oldest).

Managing and Leveraging Duplicates and Occurrences

The Occurrences Tab within the Feedback View interface offers a collection of tools to help manage and leverage Duplicate Feedback.

Feedback Occurrence Interface



1. Submitted Feedback

The total number of Submitted Feedback instances. When selected, the interface below is revealed, allowing administrators to analyze the elements of all children.

2. Predictive Feedback

The number of predictive matches found by participants. Clicking this button will display a list of the users who submitted the Predictive Matches in the area below.

3. Votes

The total Votes for this Feedback. Clicking this button will display a list of all Voters in the area below.

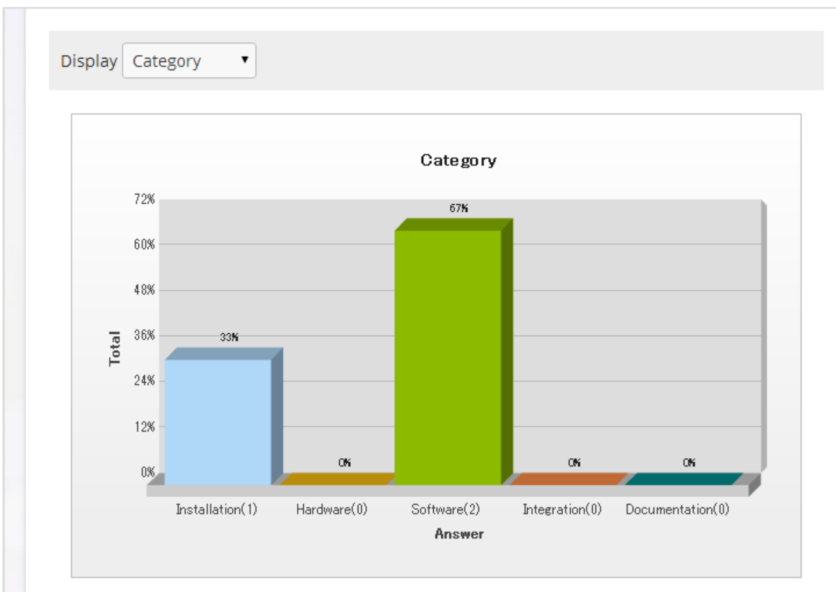
4. Total

The total Occurrence count (Reports + Predictive Matches + Votes) for this Feedback. This is the number which is displayed to Participants in Feedback Lists and on the Feedback View interface.

5. Display Child List

This drop-down box provides access to custom fields on the form, allowing users to compare the results of each Submitted Duplicate Feedback. Textual elements are displayed in a list, for example allowing administrators to read all of the users descriptions of a problem. Single and multiple choice elements are displayed as a quick chart, for example revealing how severe each user thought his issue was.

Duplicate Report Child Overview



6. Child Feedback List

If **List** is selected, a list of each reported duplicate issue is included, with links to the original issue.

7. Show Occurrences in User Management

This links to User Management, automatically creating a filter containing all Users who Submitted, Voted for, or Predictively Matched (e.g. All Submitters) this Feedback. This allows administrators to utilize existing User Management features (Filters, Macros, Email, etc.) to study and communicate with these submitters.

Splitting Duplicate Feedback Apart

In the event that a mistake is made, Feedback can be split back to its original form. Note that while the original discussion thread will remain intact, any occurrences which were merged remain with the parent.

TASK: "Unduplicating" Feedback (Manage Duplicate Feedback FB Role)

From the Occurrences Tab of Viewing Feedback:

1. Click the **ID/Title** of the Feedback you wish to separate
2. Click the **Unduplicate** link in the **Quick Actions** menu on the left

The duplicate Feedback has been split back into a separate unique Feedback instance.

Selecting Similar Fields

Not all custom fields are optimal for identifying similarity. The following steps allow you to add or remove a Feedback form element from the Similar Search functionality.

TASK: Determining Similar Search Fields (Manage Feedback Types Proj. Role)

From the Feedback Types menu: (Project Home > Project Tools > Feedback Types)

1. Select **Feedback Types** from the Project Tools
2. Select the **Form Icon** (second column) for the Feedback Type you wish to modify
3. Select the **Modify** Link (below) the Element you wish to set as the primary Description
4. Open the Advanced Options, and check the **Use in Similar Search** checkbox
5. Click the **Submit** button

At this point your Feedback Cards will include the contents of this field as their description.

Additional Duplicate Feedback Notes

- **Feedback Owner Only** - The Duplicate Management interface is only available to the Owner of the Feedback. If you are on a team that can check out the Feedback but haven't, you must first check it out (or Take Ownership) in order to mark it as a duplicate.
- **Duplicate Workflow** - Duplicate Management is designed to provide an efficient workflow for Feedback owners. If they open the Duplicate Management block, and then navigate throughout their Feedback list, this tool will automatically begin to seek out similar Feedback each time they arrive on a Feedback instance.
- **Vetting Feedback Duplicates** - If you're not content sharing original participant Feedback, and would rather have a more concise, descriptive, or cleaner version - then submit it yourself, and mark the original issue of that as a duplicate.

Feedback Automation (Requires Program, Impact, or Enterprise Edition)

One of the most exciting enhancements in the new Centercode platform is the addition of Feedback automation capabilities. When combined with other features (custom fields, element level access, public Feedback, discussion) this system offers Administrators near endless new capabilities for extending their beta programs through **automated business rules**.

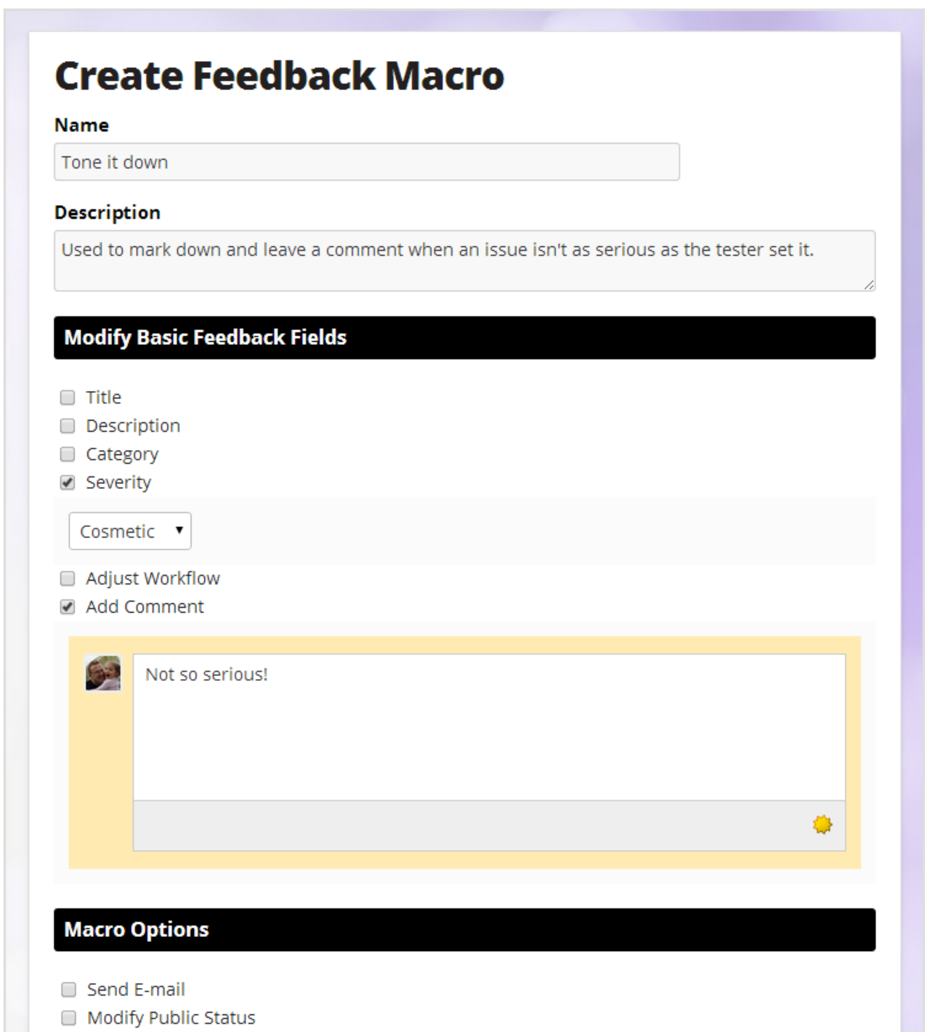
This system is broken down into four tools:

- **Feedback Macros** - Custom template for changing multiple traits about a piece of Feedback
- **Scheduled Macros** - Schedule a Macro to be executed automatically based on a filter
- **Triggered Macros** - Trigger a Macro to be executed whenever Feedback is submitted or changed
- **Mass Feedback Modify** - Change multiple Feedback at once

Feedback Macros

Feedback Macros are custom named templates that contain instructions to modify or interact with any aspect of a piece of Feedback. Feedback Macros make it much easier to handle repetitive interactions with Feedback, such as leaving a comment requesting more information, thanking participants, etc.

Feedback Macro Creation Interface



Feedback Macro Capabilities

- Modify Custom fields
- Modify Workflow
- Add to Discussion (e.g. Add a comment)
- E-mail Associated Users
    - Original Submitter
    - All Submitters
    - Owner
    - Owner Team
    - Followers
    - Other
- Set Public Status
- Adjust Submitter Score
- Add Submitter Comment
- Adjust Submitter Teams
- Adjust Owner Score
- Add Owner Comment
- Adjust Owner Teams
- Remove Feedback Entirely

TASK: Creating a Feedback Macro (Administrate Feedback FB Role)

From the Advanced Feedback Splash: (Project Home > %FB Type% > Advanced View)

1. Click the **Manage Feedback Macros & Automation** Activity link (bottom)
2. Click **Create a New Macro**
3. Provide a unique **Name** (and optionally internal **Description**) for the Macro
4. Check the boxes of any fields you wish to modify, make changes accordingly
5. Check **Show in Feedback Management** if you wish to use this Macro in Filters or from the Feedback View interface. If you enable this, you will also have the option to select Teams to share this Macro with
6. Check **Suppress Confirmation** if it's a non-destructive Macro that you do not wish to confirm for each execution
7. Click the **Submit** button

Your Macro is saved.

Feedback Macro Targets

There are currently six powerful ways to target Feedback with your Feedback Macros:

- Single piece of Feedback (Feedback View interface)
- Multiple manually selected (Checkboxes from Feedback List)
- A Feedback Filter (e.g. "critical issues", "old issues", "Johns Issues")
- Triggered based on a Feedback Filter (see Triggered Feedback Macros)
- Scheduled based on a Feedback Filter (see Scheduled Feedback Macros)
- All Feedback (e.g. no filter - typically not a good idea)

TASK: Using a Macro to Modify a Feedback Instance (Must be the Feedback Owner)

While viewing a piece of **Owned** Feedback (with at least one Macro saved and/or shared):

1. Click or select (if 5 or more) the **Macro** you wish to execute
2. Click the **Submit** button to confirm the change (if *Suppress Confirmation* is not enabled)

Your Feedback will be updated immediately.

TASK: Using a Macro to Modify a Filter of Feedback (Administrate Feedback FB Role)

From the Advanced Feedback Splash page:

1. From the **Filter** drop-down list, select the Feedback Filter you wish to include (not selecting a Filter will modify ALL Feedback)
2. From the **Action** drop-down list, select the **Macro** you wish to run
3. Click the **Perform Action** button
4. If *Suppress Confirmation* is not enabled, click **Confirm Macro** to execute

Your Feedback will be updated momentarily.

TASK: Using a Macro to Modify Selected Feedback (Administrate Feedback FB Role)

From the Advanced Feedback Splash page:

1. From the **Filter** drop-down list, select the Feedback Filter you wish to be the basis of your list
2. From the **Action** drop-down list, select **Show Feedback List**
3. Click the **Perform Action** button
4. Check the boxes in the left-most column of the individual Feedback you with to modify
5. From the **Action** drop-down list (bottom), select the **Macro** you wish to run
6. Click the **Go** button
7. If *Suppress Confirmation* is not enabled, click **Confirm Macro** to execute

Your Feedback will be updated momentarily.

Feedback Macro Notes

- Executing Macros on individual Feedback requires the user to be an **Owner**. Executing macros in bulk (scheduled, triggered, filtered) is an administrative function which does not require ownership (but does require the **Administrate Feedback** Role).
- Feedback Macros can be shared with other Teams. When not shared, they are available only to the creator.
- The **Show in Feedback Management** option will include the Macro on the Feedback View interface (in the left-hand menu), as well as the Feedback Action dropdown box. This is intended to optionally hide Scheduled and Triggered menus from these manual actions.
- The Feedback Macro Management page (accessed via the **Manage Feedback Macros & Automation** Activity link on the bottom of the advanced Feedback View Splash page) includes access to the **Macro Log** of all macro executions, including events initiated by Triggered Macros and Scheduled Macros.
- Feedback Macros are saved within Project Templates, allowing them to be reused.

Triggered Feedback Macros

Macro Triggers extend the utility of Feedback Macros by allowing them to be automatically executed whenever Feedback is **Submitted** or **Modified**, at which point the resulting Feedback instance matches the Feedback Filter set in the Macro Trigger. When used creatively with other new and existing features, triggered Macros open up a wide range of new capabilities for creative project managers.

Tip: The user equivalent of Triggered Macros would be Notice Macros, which are executed automatically when a user enters a Community or Project.

Example Uses of Macros Triggers

- A Macro Trigger could automatically **Email** a specific internal User or Team when a Feedback instance is **Submitted** and matches a "**Critical**" Feedback Filter. This would allow unique workflow or prioritization capabilities based on the severity of Feedback.
- A Macro Trigger could **Adjust the Score** and/or **Teams** of a user whenever Feedback is **Modified**, and results in a specific **Status** and **Severity** (e.g. a Verified Critical). In this scenario the participant could be rewarded automatically for providing original valuable Feedback. This opens up opportunities to reward engagement based on the *quality* of Feedback ("1 critical bug"), as opposed to *quantity* (e.g. "10 bugs").

Triggered Macro Notes

- Macro Triggers may be deactivated at any time from the Feedback Automation page.
- The Macro Log (found on Feedback Macro Management page) includes entries for each piece of Feedback impacted by a Macro Trigger event.
- Macro Triggers are saved within Project Templates, allowing them to be reused.

TASK: Creating a Feedback Macro Trigger (Administrate Feedback FB Role)

From the Advanced Feedback Splash: (Project Home > %FB Type% > Advanced View)

1. Click the **Manage Feedback Macros & Automation** Activity link (bottom)
2. Automate Feedback (Scheduled and Triggered Macros)
3. Click **Create a New Macro Trigger**
4. Provide a unique **Name** (and optionally internal **Description**) for the Macro Trigger
5. Select an existing Feedback **Macro** to trigger
6. Select an existing Feedback **Filter** to base the trigger on
7. Select a **Trigger Rate** - **On Submission** or **On Modify**
8. Click the **Submit** button

The selected Feedback Macro will now alter Feedback (and/or perform other Macro actions) that matches this Filter immediately when submitted or modified (based on selection above).

Scheduled Feedback Macros

Similar to Macro Triggers, Macro Schedules further extend the utility of Feedback Macros by allowing them to be automatically executed against all Feedback that matches a Feedback Filter at a specified rate and time. Also like Macro Triggers, Macro Schedules open endless opportunities to further automate aspects of your beta test, further increasing efficiency and participant engagement.

Tip: The user equivalent of Scheduled Feedback Macros would be Scheduled User Macros, which are near identical in function, but focused on interacting with users as opposed to Feedback.

Example Uses of Scheduled Feedback Macros

- A Macro Schedule could e-mail Feedback Owners when they've owned Feedback in a specific status (e.g. "Working"), which has not changed in 3 days.
- A Macro Schedule could e-mail submitters when a Feedback has been sitting in a "Waiting for More information" status, and hasn't had a comment in 2 days.
- A Macro Schedule could e-mail all of the previous commenters on a piece of Feedback, asking if they have anything else to add, *8* days after its last comment. An additional Macro Schedule could then Archive the Feedback automatically if it reaches *10* days.

Scheduled Macro Notes

- Macro Triggers may be deactivated at any time from the Feedback Automation page.
- The Macro Log (found on Feedback Macro Management page) includes entries for each piece of Feedback impacted by a Macro Schedule event.
- Macro Schedules are saved within Project Templates, allowing them to be reused.

TASK: Creating a Feedback Macro Schedule (Administrate Feedback FB Role)

From the Advanced Feedback Splash: (Project Home > %FB Type% > Advanced View)

1. Click the **Manage Feedback Macros & Automation** Activity link (bottom)
2. Automate Feedback (Scheduled and Triggered Macros)
3. Click **Create a New Macro Schedule**
4. Provide a unique **Name** (and optionally internal **Description**) for the Macro Schedule
5. Select an existing Feedback **Macro** to schedule
6. Select an existing Feedback **Filter** to base the schedule on
7. Select a **Rate** to execute the Macro (Hourly, Daily, Weekly, or Monthly)
8. Select a **Time** to execute the Macro
9. Select a **Starting** Date
10. Click the **Submit** button

The selected Feedback Macro will now alter Feedback (and/or perform other Macro actions) which matches the selected filter at the specified rate and time.

Mass Feedback Modify

In addition to Feedback Macro capabilities, a Mass Feedback Modify feature is now available to make bulk changes to Feedback. This tool includes identical capabilities to Feedback Macros, but is intended for one-time edits that are not intended to be reused.

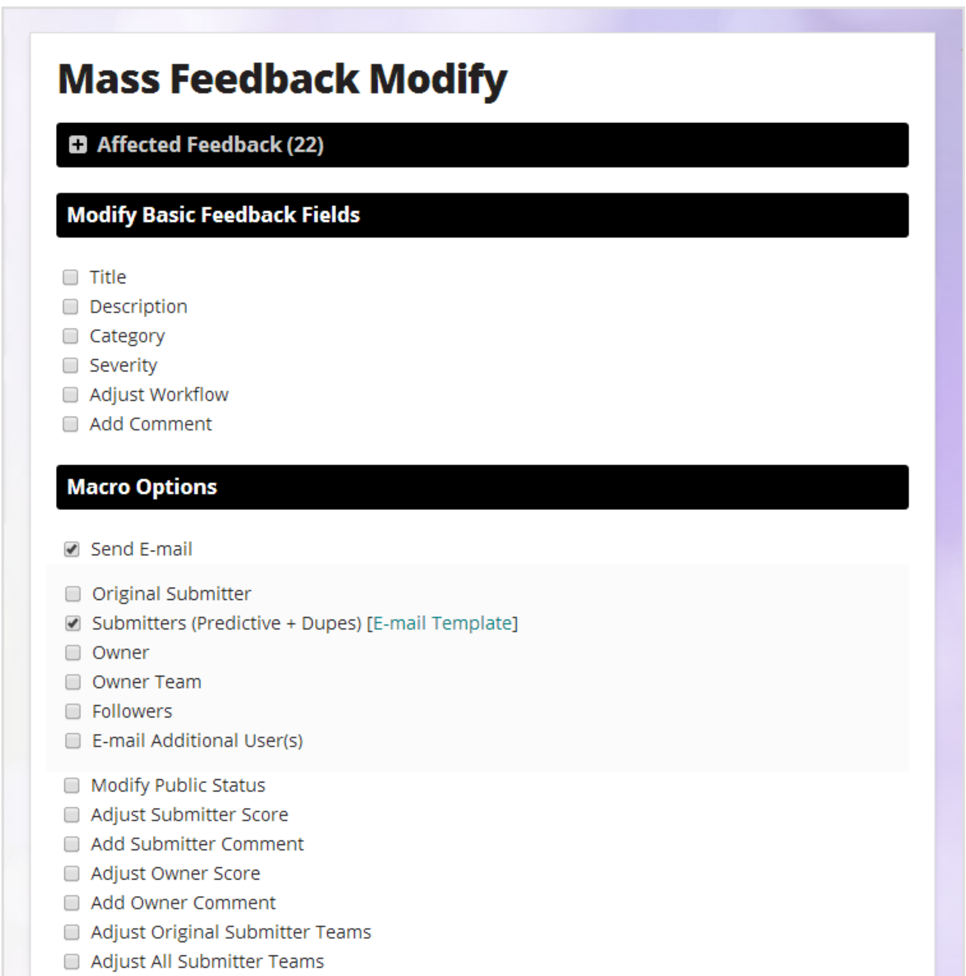
TASK: Mass Modifying Feedback (Administrate Feedback FB Role)

From the Advanced Feedback Splash page:

1. From the **Filter** drop-down list, select the Feedback Filter you wish to include (not selecting a Filter will modify ALL Feedback)
2. From the **Action** drop-down list, select **Mass Feedback Modify**
3. Click the **Perform Action** button
4. Check the boxes of any fields you wish to modify, make changes accordingly
5. *Optionally click **Save as Macro** to reuse your settings later*
6. Click the **Submit** button

Your Feedback will be updated momentarily.

Mass Feedback Modify Interface



Additional Feedback Features

The following details additional changes impacting Feedback in this release.

Use Multiple Workflows

Previously, the default behavior for creating Feedback workflows allowed for a unique workflow to be associated with each "Category" of bug. This functionality was typically used only by our largest customers with complex requirements, and thus unnecessarily complicated the experience for other users who only required a single workflow for some or all of their Feedback Types.

To remedy this, we've added a new option named Use Multiple Workflows, which is disabled by default. This simplifies the process of creating a Feedback Type by removing the "Category" step, taking the user directly to the Workflow itself. Enabling the option will replicate the prior method.

TASK: Enabling Multiple Workflows (Manage Feedback Types Role)

While editing a Feedback Type: (Proj. Home > Proj. Tools > Feedback Types > %Type% > Basic Feedback Properties)

1. Check the **Use Multiple Workflows** checkbox under Advanced Options
2. Click the **Submit** button

Multiple Feedback types will now be available when creating your Feedback Type.

Multiple Workflow Notes

- Projects created prior to this release will default this enabled if they used multiple workflows.
- If you would like a Category field, but don't need multiple workflows, we recommend creating a custom field (likely a Single or Multi-Choice element) to provide this functionality.
- While this feature is available to all prior customers, moving forward only Impact and Enterprise Edition customers will have access to this feature.

Collaborative Settings Overview

The following provides a comprehensive reference for the new Collaborative Feedback Settings page, which exposes many of the features covered throughout this guide.

TASK: Modifying Collaborative Settings (Manage Feedback Types FB Role)

Navigate to Proj. Home > Proj. Tools > Feedback Types > %Type% > Feedback Collaboration Settings

Collaborative Setting Feature Overview

Discussion

- **Allow File Attachments** (Default: On): Allow users to include attachments with their comments.
- **Non-Moderators Can Modify Their Posts** (Default: On): Allow participants to modify their own comments at any point after they've submitted them.
- **Allow Comments on Submit** (Default: Off): Include the discussion field (including file attachment capability, if enabled above) on the form when creating new Feedback. Note that we recommend disabling this if you want to better control the structure of the initial Feedback.

Voting

- **Vote Label** (Default: *Vote*): The label used throughout the interface when adding a Vote. For example voting for a forum topic may be labeled "Me Too".
- **Remove Vote Label** (Default: *Remove Vote*): The label used throughout the interface when removing a Vote. For example removing a vote for a forum topic may be labeled "Not Me".
- **Voting Header Label** (Default: "*%Click here% to vote for this Feedback.*): The label used at the top of the Feedback View page when voting is available. For example, a bug report may be labeled "*%Click here% if you've experienced this issue*". Note that surrounding anything in double percent signs (%) will link that part (Note that the mobile interface turns the entire string into a button).
- **Show Occurrence Count** (Default: On): This will include a large number in Feedback lists and on the right side of Feedback, which is interactive, allowing users to vote. Note that this number is technically the **Occurrence Count**, which is a roll-up of **Votes**, Reports (duplicate submissions), and **Predictive Matches** (thus all **Submitters** of the issue). For simplicity these child elements are not messaged to external participants, but rather rolled up to a single value which broadly signifies popularity. If this feature is not enabled, users who have the **Vote For Feedback** Role can still Vote from the link in the left-hand menu, or via the contextual string at the top of the form (i.e. the options above). In these situations the user would not be able to see the number of prior occurrences/votes, thus reducing potential bias.

Predictive Feedback

- **Predictive Introduction Label** (Default: "*Before you submit new Feedback, please try typing various titles or keywords that would describe it. We'll try to match existing Feedback we already have.*"): This provides a highlighted block of text directly below the large text entry box that allows users to search existing Public Feedback. Customizing this allows you to tailor your predictive messaging to the specific type of Feedback that you're collecting.

Public Feedback

- **Set All Feedback Public by Default** (Default: Off): This will set the initial state of all Feedback submitted as Public, thus including it in Predictive Feedback Matching and Access Public Feedback Role. Note that while this defaults all Feedback to Public, this flag can still be toggled off.
- **Set Duplicate Feedback Public by Default** (Default Off): This will set Feedback instances to Public the first time that a duplicate has been identified by the Duplicate Management system. This enables a workflow process where in all Feedback is initially seen and managed by a moderator, but once duplicates are found, the Feedback is introduced into the Predictive Feedback Matching system, reducing further workload as that issue is repeatedly identified by additional participants.

User Management Improvements

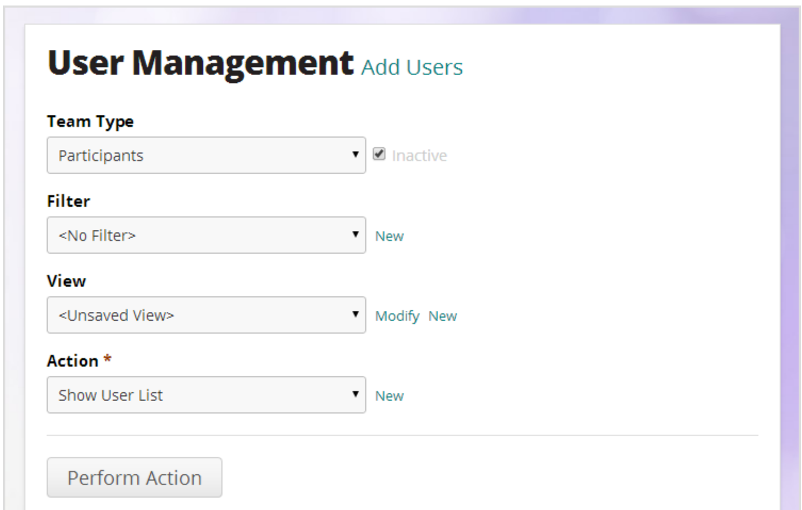
While Feedback Management received the lion share of the enhancements to this release, User Management did not go forgotten, receiving a number of the same interface improvements introduced in the Feedback changes. In addition, User Management now provides multiple systems to assess user performance over time, helping increase engagement and reduce falloff.

User Management Splash Enhancements

Team Type (i.e. "Super Filters")

Similar to Feedback's new "Include" feature, the Team Type Super Filter simplifies user list creation by targeting specific user types. This is beneficial as typically filters focus on a group of users such as Applicant, Participant, Internal Member, or Project Managers. Moving forward, these no longer need to be included in Filters, simplifying their creation.

New User Management Splash Page



Include Inactive

Similar to the **Include Archived** option on the new Advanced Feedback Management splash page, the **Inactive** option allows you to easily include or remove inactive users, further simplifying User Filter creation. This typically includes users who have been invited, or had their accounts created, but have not yet activated them.

Improved User Data Engine

Also similar to the Feedback Data Engine enhancements, the User Data Sets have been overhauled entirely, providing improved organization that is context aware. In other words, features you're not utilizing in a Project (e.g. Surveys or Tasks) will not show up as Data Sets or criteria until at least one of these items exists. This results in a cleaner list of Data Sets and criteria, simplifying the process of creating and managing User Views and Filters.

Tip: This overhaul applies everywhere the User Data Engine is used, including Views, Filters, Dynamic Tags, Reporting, Notice Macros, Feedback Automation, and User Automation.

New User Data Engine Criteria

With the introduction of so many new features, we've also extended the Data Engine criteria which are available for use throughout things such as Filters, Views, Dynamic Tags, Reporting, Macros, etc. These include:

- # of Total Comments
- # of Total Votes
- Avatar (View Only)
- Small Avatar (View Only)
- Avatar Last Updated
- Has Avatar
- Project Score This Week
- Project Score This Month
- Project Score Last Week
- Project Score Last Month
- File Downloads (per file attached to any Content or Releases)

Temporal User Scoring

While the platform has always included user scoring capabilities, previously this was ultimately represented as a static score which had no reference to time. This is problematic when a participant is heavily engaged early in a test, but then fell off in their engagement as the test progressed. With a single static score, this is extremely difficult to detect.

To resolve this problem we've introduced four new Data Engine criteria which provide time-sliced User Scores, including score this week, last week, this month, and last month. This opens up new opportunities to further encourage and increase participant engagement.

Tip: This feature is greatly enhanced by the platforms new Feedback Automation capabilities, which allow rules to be created which automatically increase user score based on qualitative actions.

Example Temporal User Scoring Use Cases:

- If a User's **Score This Week** (or Month) is zero (or low) mid-way through the week (or month), an e-mail can automatically be sent (using Scheduled User Macros) to request that the user increases their engagement.
- Each week, the **Score Last Week** (or Month) criteria could be used to identify top participators, from which incentive rewards could be granted. Doing so provides an ongoing reward program, but resets each week (or month) to provide fresh opportunities to win.

Temporal User Scoring Notes

- The **Week** in **Score This Week** and **Score Last Week** represents Sunday through Saturday (meaning that Sunday begins a new week).
- The **Month** in **Score This Month** and **Score Last Month** represents the calendar month (meaning the first of the month begins a new month).

TASK: Accessing Temporal User Scoring (Manage Users Project Roll)

Navigate to Proj. Home > Proj. Tools > User Management

From the User Management page:

1. Create a View
2. Select the **User Score** data set
3. Double-click any of the Score items to add to your View
4. Optionally check the box and provide a name to **Save** your View
5. Click the **Create View** (or **Create View and Execute**) button to use the View

Your users scores will be displayed.

File Download Logging

This release (finally) introduces the ability to track user downloads on a file by file basis, from the Data Engine itself. This means that project managers may now filter by users who have or haven't downloaded a specific file, making it easy to reach out and/or modify scoring accordingly. Likewise, this information can be used in automation (Notice Macros, Scheduled User Macros) and reports.

TASK: Accessing File Downloads (Manage Users Project Roll)

Navigate to Proj. Home > Proj. Tools > User Management

From the User Management page:

1. Create a View
2. Select the **Releases** or **Content** data set
3. Select the **File Downloads** sub data set
4. Double-click any of the available Files to add them to your View
5. Optionally check the box and provide a name to **Save** your View
6. Click the **Create View** (or **Create View and Execute**) button to use the View

Your user downloads will be displayed.

File Download Logging Notes

- Data Engine criteria exists for each individual file associated with any Content or Release.
- Both Views and Filters include separate results for **Downloaded**, **Failed** (they tried but for some reason it was not successful) and **Not Tried**.

User List Enhancements

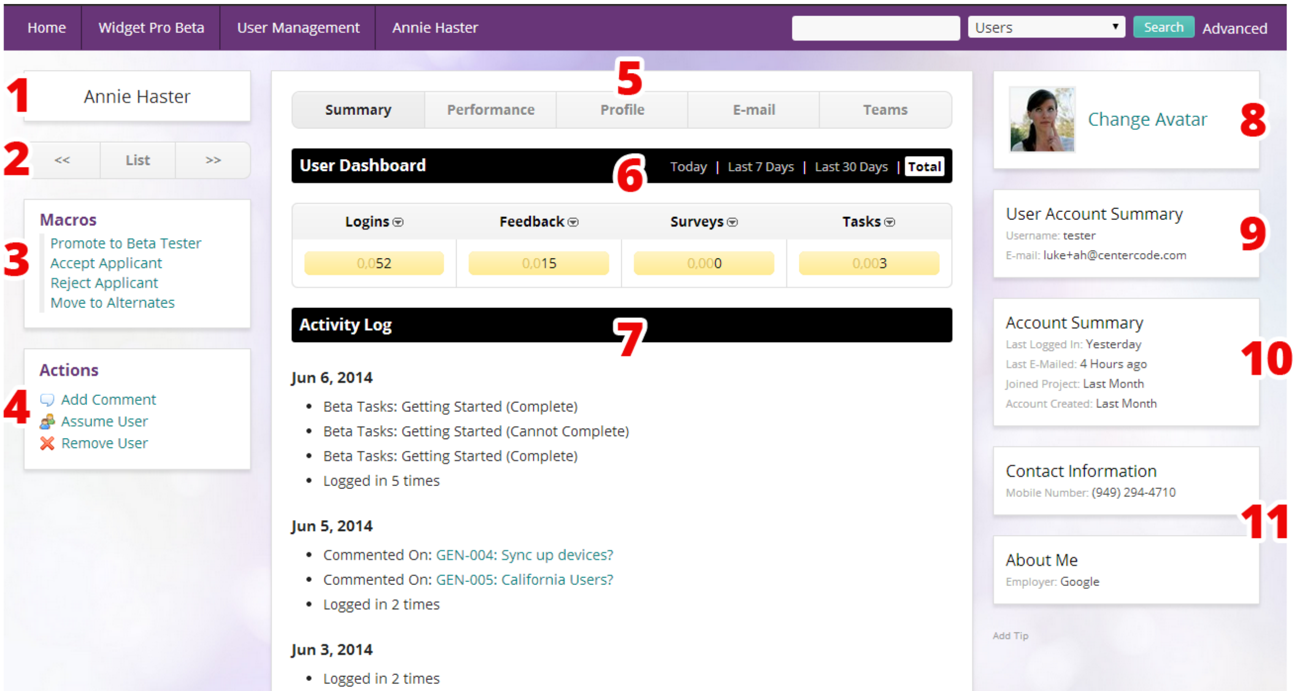
The User list has received similar minor improvements to the Feedback list.

- In the User List view, columns may now be resized by dragging their borders with your mouse.
- In place of the View icons, the left-most column is now always linked, saving space.

Revamped Activity-based User Summary

The User Summary page, which details all relevant information about an individual user, has been redesigned to more closely match the new Feedback View interface, while refocusing on an activity based log style overview.

New User Summary Interface



1. Full Name

The full name of the current user being viewed.

2. Filter List Navigation

Navigation within the current filter. Note that if this page was accessed by clicking a user's name throughout the platform, there is no filter, therefore this navigation will not appear.

3. User Macros

Access to quickly execute a User Macro on the current user.

4. Actions

Common actions including the ability to add a comment, assume the users identity, and remove the user.

5. User Overview Tab

Access to various types of information about this user.

A. **Summary** - The base activity log page.

B. **Performance** - Access to the new user comment & ranking system, as well as the users performance history.

C. **Profile** - All profile information associated with this user including User Profiles, Test Platforms, Surveys, Tasks, Agreements, and Distributed Values.

D. **E-mail** - Access to all e-mail sent to this user from within this project.

E. **Teams** - The interface for viewing and altering this users Project Team membership.

6. User Activity Summary

A summary of each type of activity this user has contributed to the project. This can be narrowed to a specific date period (see the links in the top right). Clicking any column will filter the list below to only items within that area. For example, clicking Feedback will narrow the activity log to Feedback submitted, votes, and comments added to Feedback. Clicking any column a second time will reset the filter to show all data below. Note that the status of this filter will be retained as you move throughout the user list.

7. Activity Log

A log of all Project activity for this user. Note that this log is filtered by the date period and any column selected above. If no column is selected, all activity is shown.

8. Avatar

The Users current Avatar. Clicking Change Avatar will allow a moderator to upload a different avatar or remove an inappropriate one.

9. User Account Summary

Basic user information including email address and user name.

10. Activity Summary

Basic access information including last logged in date, last e-mailed date, when the user joined the project, and when their user account was initially created.

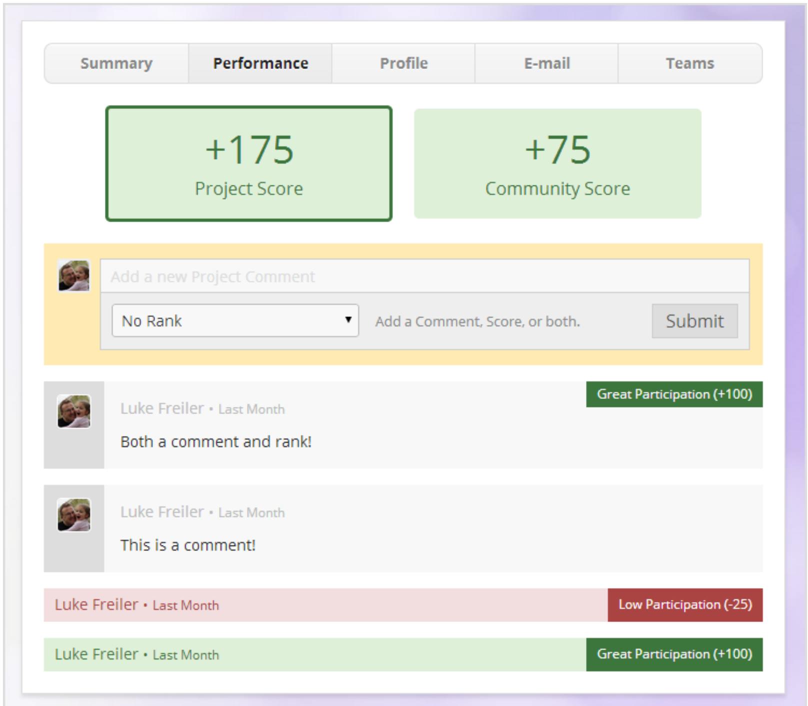
11. User Profile Summary Fields

A list of all fields from Community User Profiles with the **Use in Summary** option selected.

Revamped User Performance Interface

The interface for adding and reviewing user performance details has been revamped to utilize the new discussion interface, while also adding color coded messaging to indicate performance outlook. Positive ranks will now appear green, with negative ranks appearing red, and neutral ranks appearing blue. This allows administrators to quickly estimate at a glance how a user is performing within their project.

User Summary Performance Tab



User Performance Interface Notes

- When only a Rank is added (no comment), a small full-width block is displayed, colored based on the sentiment of the rank (positive, neutral, negative). This conserves space.
- When a Rank and a Comment is added, the Rank and its color sentiment are displayed in the upper right corner of the Comment.
- Hovering your mouse over any Comment or Rank will allow you to remove it (and any score adjustment that may be associated with it).

Bug Fixes

In addition to the new features and enhancements in this release, the following bugs were forcefully squashed.

- Exporting distributed values into PDF will now populate the data correctly (formerly had to use CSV as a workaround).
- Calendar widget now opens in the correct location on date/time form elements when using the Internet Explorer web browser.
- An issue specific to newer versions of Internet Explorer which caused interactive boxes to not always work properly has been resolved.
- Fixed additional issues with user/Feedback view default sort and ordering, as well as removed some of the bad conditions due to design changes.
- Many visual adjustments and baseline string tweaks have been made throughout this build.
- Rare instances of Feedback submission leading to “URL Too Long” messages have been fixed.
- Feedback Form Comment Elements (renamed to “Notes”) now send E-mail based on the following priority; No Reply > Project General > Community General
- Display issues on the results page when searching within Link Feedback will now longer occur (this area was completely redone in this release).
- Certain issues that could arise due to the “View” and “Edit” states of Feedback forms will no longer occur, since we no longer make this same distinction when looking through Feedback.
- User Macro Creation confirmation now uses “Created” instead of “Modified” as expected.
- Fixed an error that could occur when trying to modify a Single Choice form element item (when only one item existed on that element).
- Removed a page that was no longer useful when manually adding Community users to a Project (previously had you select Community level - but this was the only option).
- The time allowed for distributions to process before sending has been extended to accommodate larger PDF reports to finish generating.
- Feedback access is more strictly enforced throughout our new Feedback system (with the addition of a new Public access toggle).
- An issue with item ordering on Single and Multiple Choice elements when first adding new items to an existing element has been corrected.
- An issue with adding and then removing an item (prior to submit) from Single and Multiple Choice form elements has been corrected.
- A Check In/Check Out access issue when special characters were entered into the Feedback Tracking Label has been resolved.
- Changes were made with memory allocation to allow for more efficient file downloading.
- A few additional user-facing XSS vulnerabilities have been addressed over the course of this release.

Next Steps and Roadmap

While we're happy to heave this release out the door, there's no time for rest. Moving forward we plan to release smaller builds on roughly a quarterly basis, focusing on one major feature and a number of small improvements and bug fixes. As usual, customer feedback is driving every one of our design decisions.

The Centercode Roadmap

Currently our focus is on designing and implementing the following oft-requested features.

- **Participant facing WYSIWYG Editing** - While we love our new Feedback platform, security constraints limited us from releasing customer facing rich-text editing. We plan to work through these issues in our next release.
- **Feedback Forum Enhancements** - With the merger of Feedback and Forums, some minor previous forum functionality was lost. This includes sticky posts, the basic forum index (which lists things like topic and reply counts), and various end-user facing filters (e.g. "threads with attachments". We will soon be adding back the relevant lost features, most of which should also benefit traditional feedback types such as bug reports and feature requests.
- **Convert Feedback** - While aligning feedback types and forums (e.g. bug repots and general discussion) in a single list has already proven to encourage users to more accurately target their feedback, we are planning to release a feature which allows you to convert Feedback between Feedback Types.
- **Project Resource Cloning** - We're planning to introduce a new tool which allows customers to copy individual resources from any other Project. This includes objects like Surveys, Releases, Task Lists, Content, and more. In addition, we hope to let customers export their resources to file, allowing them to be shared across Centercode implementations (in which case we hope to introduce a shared beta resource library).
- **Revamped Recruitment System** - We are planning to revamp our recruitment system entirely, introducing brand new capabilities for onboarding participants including a flexible referral and token systems.
- **SAML Support** - We will soon be rolling out SAML support for customers looking to integrate their existing SAML based SSO authentication systems.
- **Impact Scoring Enhancements** - Once we've had an opportunity to gather feedback on our new Impact Scoring system, we plan to take this further with additional logic and new signals to help our customers further improve their feedback prioritization efforts.

Thanks for reading and enjoy the new Centercode.