
HOW TO REQUEST AN ENHANCEMENT (PENDO FEEDBACK/RECEPTIVE)

How to request a new feature for the ZIMS application and how to search for and vote on improvements (enhancements) suggested by other members.

Contact support@Species360.org

Topics Covered

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Bug versus Enhancement

A **Bug** is something that is wrong in the ZIMS application. Typically, Bugs mean:

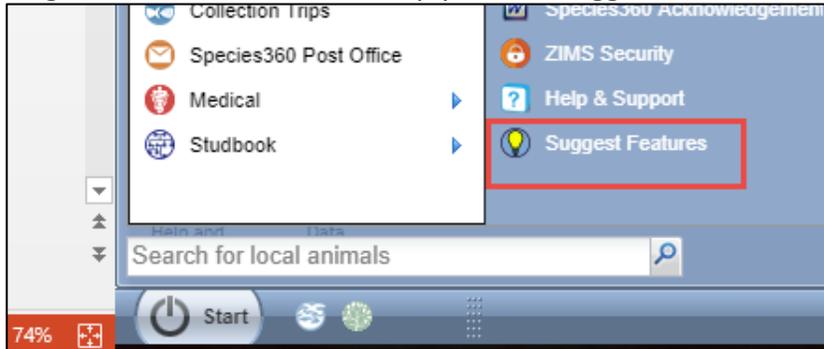
- ZIMS does not function as designed
- You cannot get part of your work done
- The data appears to be incorrect
- Submit these to support@Species360.org
- They may decide your request is an Enhancement and ask you to submit as such

An **Enhancement** is an idea or suggestion that will help make ZIMS work better for you by:

- Making data entry faster
- Making data entry easier
- Adding desired functionality and data fields
- These are submitted right through ZIMS!

Pendo Feedback (formerly called Receptive) is a third-party software created specifically for feedback management. Pendo Feedback allows ZIMS Users to submit enhancements, vote for their favorites and prioritize those they have voted on. It allows the ZIMS Enhancements to be transparent for all Users to view and lets Species360 know what is important to our members.

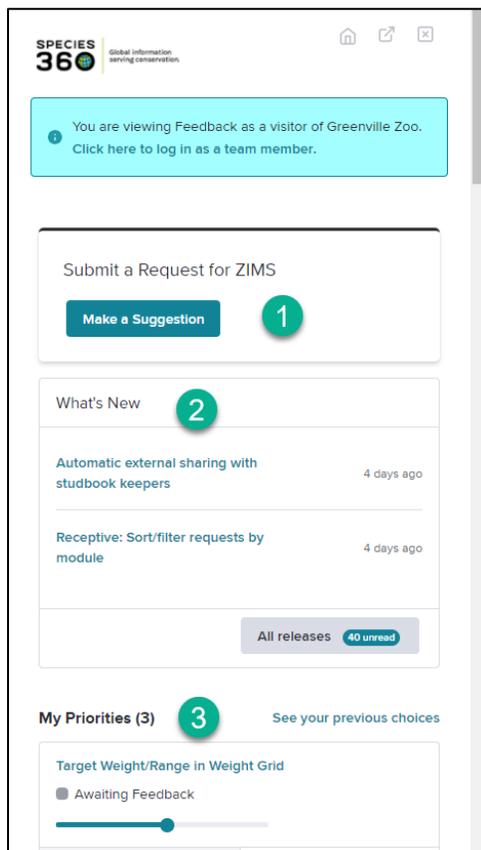
To get into Pendo Feedback simply select “Suggest Features” under the Start menu or...



Click on “Suggest Features” on the right-hand side of the ZIMS dashboard.

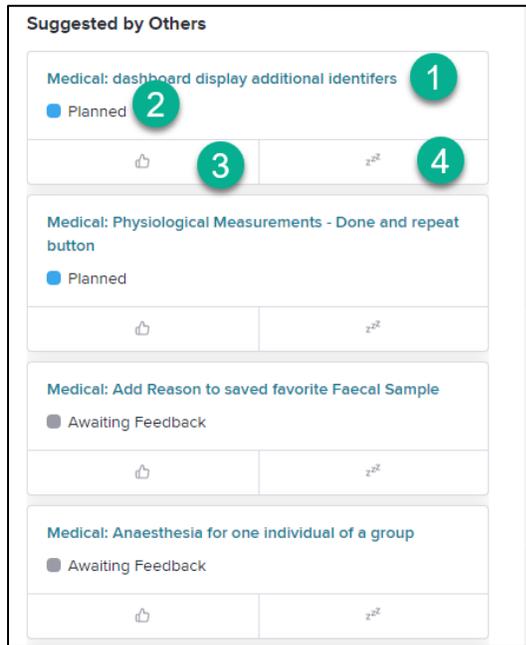
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Mini Dashboard



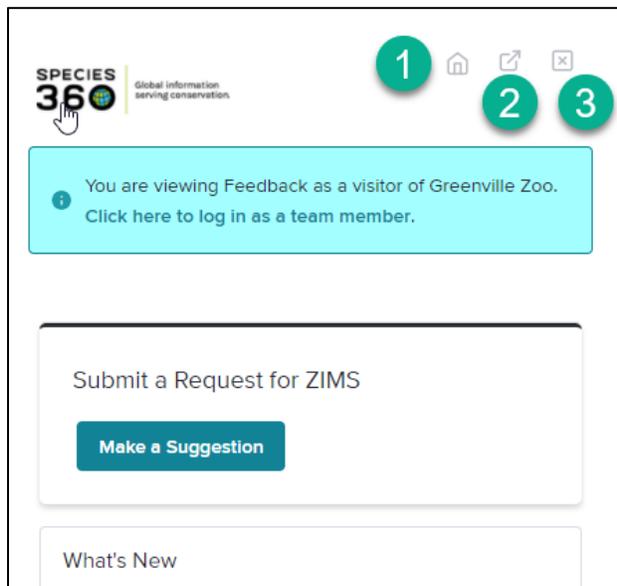
This will open a mini dashboard.

1. You can submit your suggestion from here, but we don't recommend doing so immediately!
2. What's New displays requested Enhancements that have recently been released in ZIMS. You can review the last 40 releases by selecting All Releases.
3. My Priorities displays the Enhancements you have voted on and how they are prioritized by you.



Scrolling down further you will see Enhancements that were suggested by your colleagues.

1. Clicking on the title will take you to a description of the Enhancement, who submitted it and when. From this page you can vote on it or select to subscribe to it, meaning you will be kept updated on its progress.
2. The status will display.
3. You can vote for it.
4. You can indicate you are not interested in it.

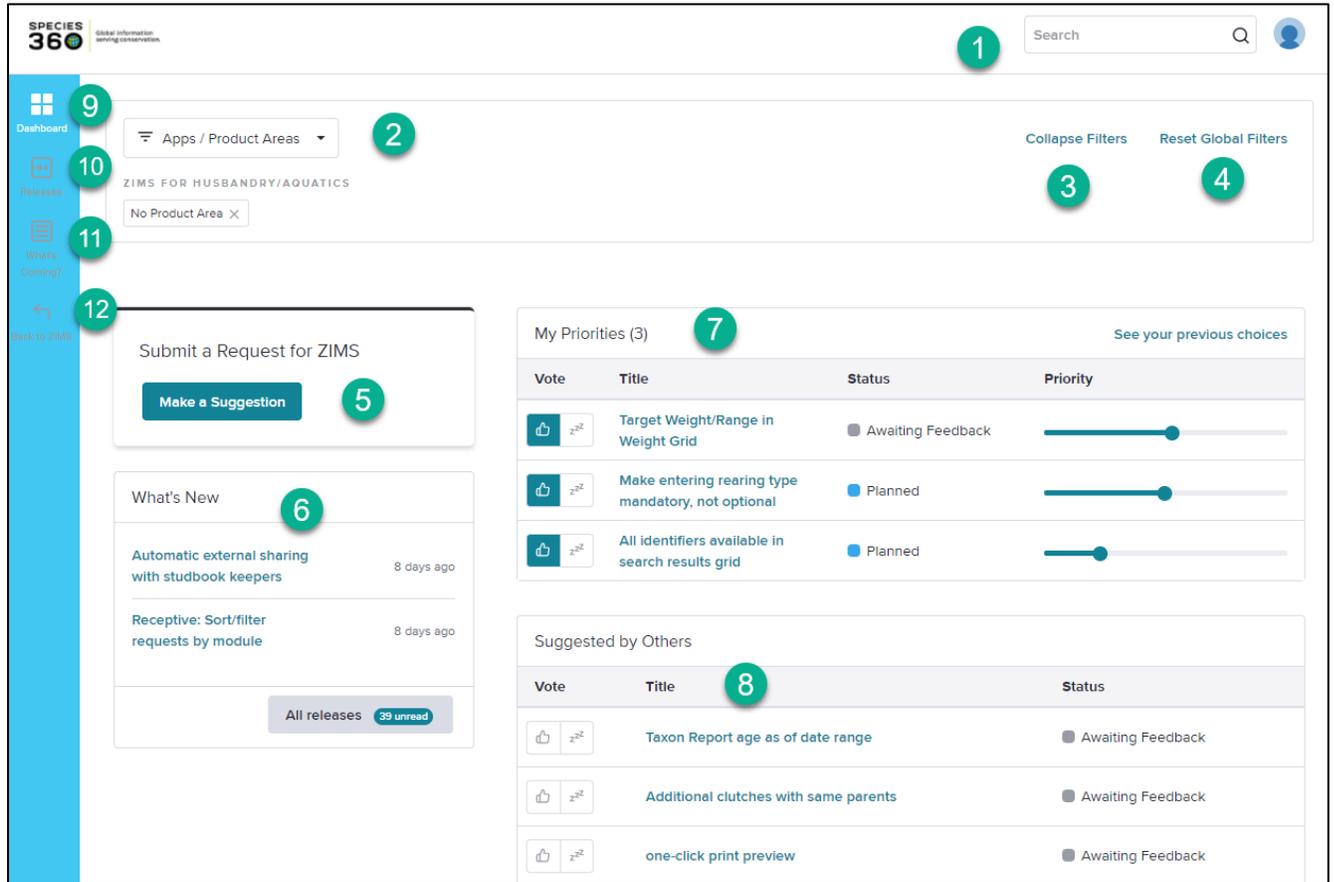


At the top right there are three icons.

1. The House will take you back to this dashboard if you have opened other areas.
2. Select the arrow to open the full dashboard with additional options.
3. Select the "x" to close the window and get back into ZIMS.

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Full Dashboard



The screenshot shows the 'Full Dashboard' interface. At the top right is a search box (1) and a user profile icon. Below the search box is a filter dropdown menu (2) currently set to 'Apps / Product Areas'. To the right of the filter are 'Collapse Filters' (3) and 'Reset Global Filters' (4) buttons. On the left is a vertical navigation sidebar (9) with icons for Dashboard, Releases, What's Coming?, and Back to ZIMS. The main content area includes a 'Submit a Request for ZIMS' section with a 'Make a Suggestion' button (5), a 'What's New' section (6) showing recent updates, a 'My Priorities (3)' section (7) with a table of voted items, and a 'Suggested by Others' section (8) with another table of suggested items.

Vote	Title	Status	Priority
 zzz	Target Weight/Range in Weight Grid	<input type="radio"/> Awaiting Feedback	<input type="range"/>
 zzz	Make entering rearing type mandatory, not optional	<input checked="" type="radio"/> Planned	<input type="range"/>
 zzz	All identifiers available in search results grid	<input checked="" type="radio"/> Planned	<input type="range"/>

Vote	Title	Status
 zzz	Taxon Report age as of date range	<input type="radio"/> Awaiting Feedback
 zzz	Additional clutches with same parents	<input type="radio"/> Awaiting Feedback
 zzz	one-click print preview	<input type="radio"/> Awaiting Feedback

We selected the arrow to open the full dashboard.

1. There is a Search box that allows you to search for Enhancements that have been submitted.
2. You can filter by Husbandry/Aquatics, Studbook or Medical requests. Above we have selected to filter by Husbandry/Aquatics
3. If a filter is selected, you have the option to Collapse it. If Collapsed the filter (2) no longer displays but filtering continues. If Collapsed (3), you have the option to Expand the filter to view it again.
4. Selecting Reset Global Filters will clear any Product Area filters selected.
5. You can submit an Enhancement suggestion here. But wait!
6. The most recent released Enhancements will display here. To see a list of all released Enhancements, select All Releases. The list will also display when it was Released.
7. The Enhancements you have voted on display here. You can view the details by selecting the Title hyperlink. The current Status also displays. Use the slide bars to set your desired Priority. Remember as you increase the Priority of one, the others will decrease. They cannot all be top Priorities. Selecting to See your previous choices lets you look at Enhancements you had voted on where you may have changed your mind or may have been released or declined

8. Here you can view the Enhancements Suggested by others. You can vote on them here (thumbs up), note you are not interested (Zzzz), view the details (more on that later) and note the current Status.
9. Whenever you want to get back to the Dashboard select this icon.
10. To see a list of released Enhancements, select this icon. The list will also display when it was Released.
11. To see what is planned and what is being built select this icon. Once opened, you can view the details by selecting the name hyperlink, vote for it or say you are not interested.
12. To get back in to ZIMS select this icon.

If you want to view all the details of the Enhancement select the Title hyperlink.

Egg fertility column in animal search results #26615

Stephanie Eller - 3 years ago 1

Detailed description (optional)

If you could add a column that indicates egg fertility to the animal search results options, it would give us a quick way to see which accessioned eggs were fertile (but did not hatch for whatever reason) vs. infertile.

Apps

DISCUSSION

Add your comments here! 2

Tip: Write #123 to link to request 123. Markdown allowed.

[Add comment](#)

Deanna Snell 2 months ago 3

Yes, please. It is very frustrating to pull egg reports and not be able to see which eggs were fertile vs. infertile especially for those species that are part of an SSP or conservation program.

Request status 4

Awaiting Feedback

We're gathering feedback from customers, so that we can gauge demand for this feature. Make sure to click "Want" on this feature if you need it.

Kim Larson (ZIMS) - 3 years ago

Request actions 5

[Subscribe to this](#)

Request activity 6

2 0

1. The Enhancement title, number, submitter and detailed description displays at the top
2. You can add a comment in the Discussion box.
3. View the comments that others have added.
4. The current status displays
5. You can vote on it, indicate you are not interested in it and subscribe to it. Subscribing means you will receive emails if the status changes.
6. You can see how many people have voted on it.

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Making a Submission

Now you are ready to make a suggestion. Below is an example. This User would like to be able to add floor plans to an Enclosure record, so they submitted a new request with their single vote.

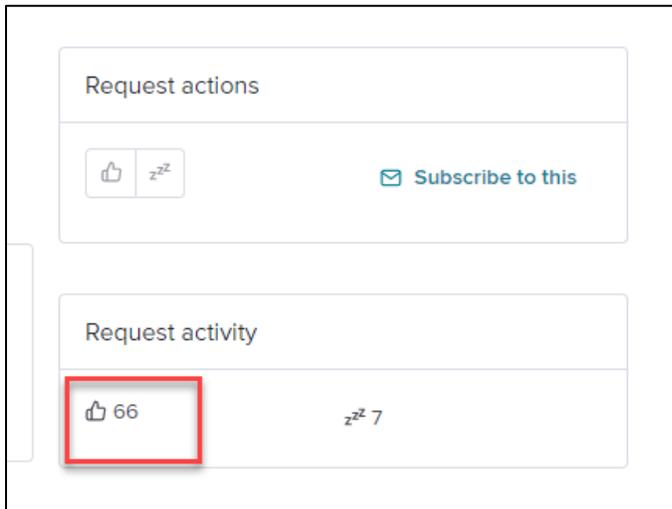
Enclosure: Add enclosure floor plans (pdf) similar to adding pictures for animals

 Edit

I would like to add an attached document such as a pdf to an enclosure group that shows the floor plan of the area. Can be added in a similar way to adding images for animals.

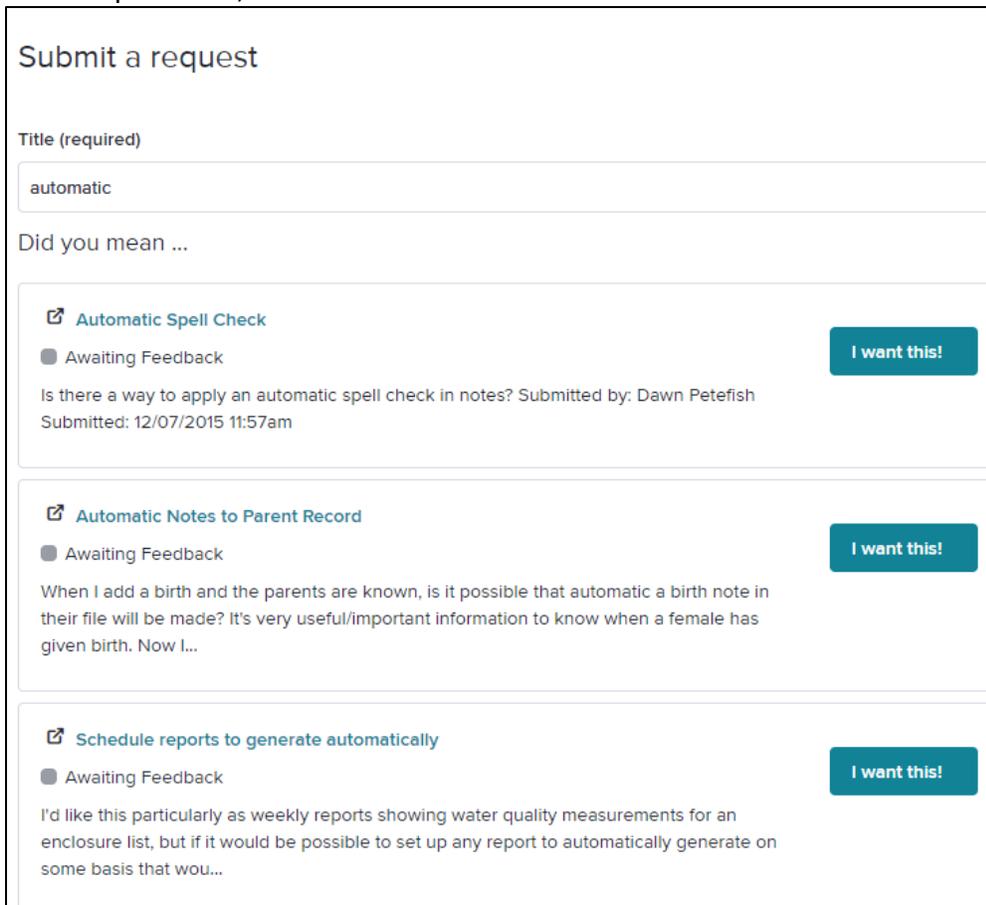
However, if you had first searched for related requests, trying various terms, you would have found a request for “Add Image to Enclosures” has already been submitted.

Vote	Title	Status	Created
 	Add Image to Enclosures	<input type="radio"/> Awaiting Feedback	4 years ago
 	Enclosure report for multiple enclosures	<input type="radio"/> Awaiting Feedback	4 years ago
 	Enclosure tree - mark enclosures inactive	<input type="radio"/> Awaiting Feedback	a year ago
 	Enclosure responsibility	<input type="radio"/> Awaiting Feedback	a year ago



Opening the details shows that 66 people have voted on this Enhancement. What you should have done is place your vote on this Enhancement instead of submitting your own. The more votes an Enhancement has, the higher it is in the Species360 priority to develop.

Once you confirm that your idea has not already been suggested, select the Make a Suggestion button. When you start typing, Pendo Feedback will look for possible matches. Only the top 3 will display here, that is why you should use the more detailed Search first. If your idea happens to be one of the top 3 found, select the “I Want This” button – no need to submit a new one!



If it is not one of the top 3, complete the title and scroll down.

Location in ZIMS, e.g. "animal basic info" or "studbook suggestion"

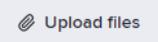
Animal Notes and Observations **1**

Detailed description (required)

Tell us exactly what you want **2**

Tip: Write #123 to link to request 123. [Markdown allowed.](#)

Files

 **3**

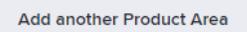
Product Areas

App **4**

 ZIMS for Husbandry/Aquatics

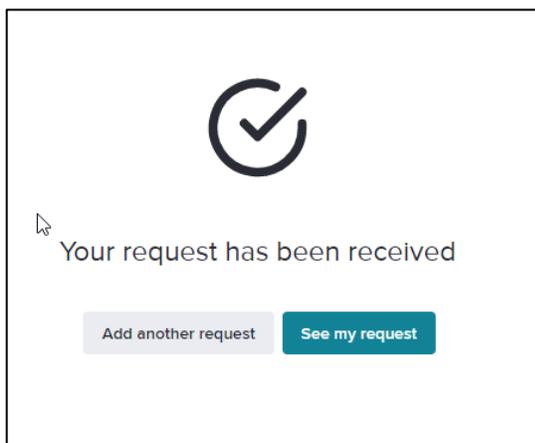
Product Area (optional)

None Selected



  **5**

1. Enter the location in ZIMS so we can easily find where you are talking about.
2. Provide a detailed description of what it is that you want and why. Whereas as the title should be short, but clear, the description is where you can provide details. For the title think of wording that others may use to help them find it to vote on it.
3. You can even upload a file for further clarity.
4. Select the module (Husbandry/Aquatics, Medical or Studbook). If it applies to more than one area select Add another product area.
5. Cancel or Submit the Request.



You will get a message that your request has been received. You can view your request or suggest another feature.

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[Enhancement Review](#)

When your request is submitted it is reviewed by Species360:

- Duplicate? If so, you will be notified that your vote was added to the original submission
- Is the request clear? If not, you will get an email asking for clarification
- Should it be Accepted or Declined? (more on Declined later)

Sometimes it may be Accepted but the title changed. Having looked at over 2,500 suggested Enhancements, we have an idea what terms are commonly used. Your title may be changed to use terms that will allow other Users to find it quicker.

The following are definitions for the various statuses:

- Not Reviewed - This is the default status of new submissions
- Awaiting Feedback - The request has been reviewed and accepted
- Planned - The request has been approved for future development
- Building - The request is in active development
- Released - The request has been released!
- Declined - The request will not be done

Submissions may be Declined for various reasons:

- It breaks a ZIMS Business Rule and may not be logical
- ZIMS already does it and we will let you how to do it
- Already Submitted, we will add your vote to the initial request

Please resubmit if you believe the request was misinterpreted or if you feel strongly enough and can justify the need.

How we decide which Enhancements to develop:

From User Feedback – Popularity is the number of User votes a submission receives. Take the time to Vote for your favorites! Priority is pulled from User prioritizations. It is important to prioritize your requested features because that helps us determine what requests are of the most value to our Users.

There are two reports that we can run – one on Value and one on Popularity. The results are seldom the same. Reviewing both of these reports will help guide us for any future Enhancement development.

From Developer Feedback - Effort is the amount of time/number of developers needed to develop the feature. Value is the benefit the Enhancement would be to our members. The best-case scenario is the Effort is low but the Value is high. If it is a high Effort but determined to be of low Value, it will probably not get done.

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