



## WHAT'S NEW AND WHAT'S COMING

ARCHITECT USER FORUM 2015 - BOSTON

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# The past year – Where did it go?!

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AR5 or ARchitect 5 – The new redesigned and enhanced

- 9 months of fulltime development
- Feedback from users, user survey
- UI design iterations
- Usability testing
- QA Testing, external and internal
- Released on 7/5/15

New Website and Blog



The screenshot shows the login interface for ARchitect. At the top left is the ARchitect logo, which consists of a blue circular icon with a white 'C' shape inside, followed by the text 'ARchitect' in a grey sans-serif font. Below the logo is a white rectangular form with a light grey border. Inside the form, there are two input fields: the first is labeled 'User Name' and the second is labeled 'Password'. Below these fields is a prominent blue button with the text 'Log in to ARchitect' in white. Underneath the button is a smaller, underlined link that says 'Forgot your password?'. At the bottom of the form area, there is a small copyright notice: 'Copyright © 2000-2015 ARInsights, LLC. All rights reserved.'

# What did we get?

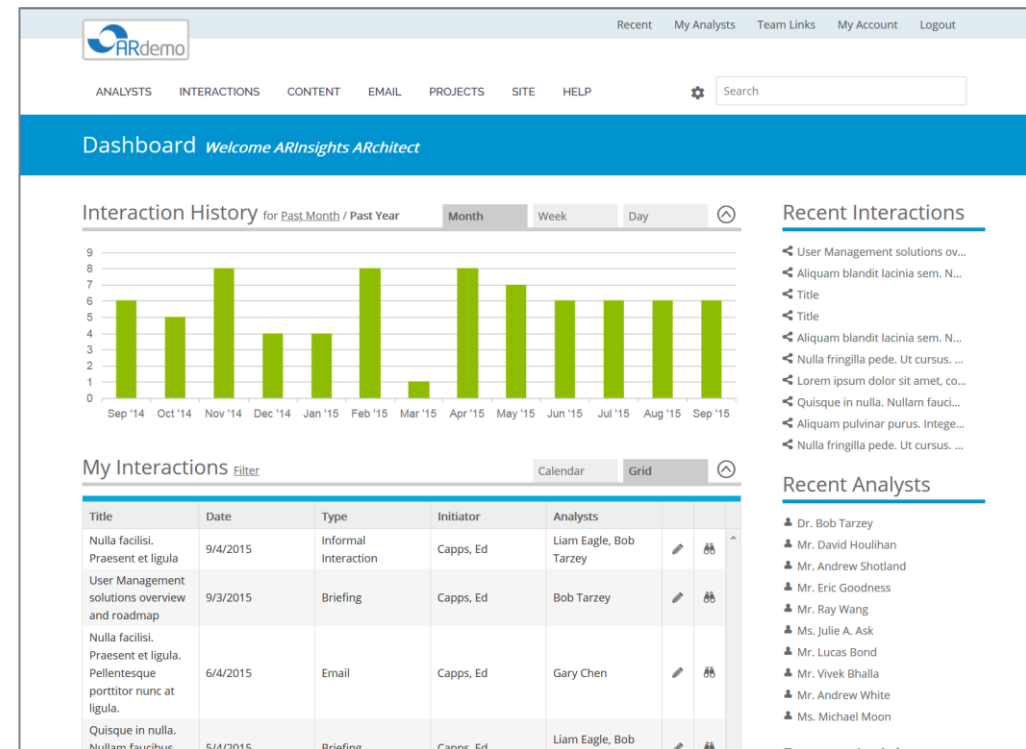
## Complete UI Redesign

- New Dashboard
- New Finders
- New forms
- Detail Pages

## New functionality

- Bulk Updates
- Saved Views
- Scheduling

Completely rebuilt backend to support years of upcoming enhancements



# New Finders

More Control over your data

- Filter manager
- 2 Export Options
  - Export Everything
  - Or just what you need
- Reorganize columns
- Full screen view
- Multiple actions from finders
- Row click
- Calendar View for Interactions

The screenshot displays the ARdemo Interactions dashboard. At the top, there is a navigation bar with links for Recent, My Analysts, Team Links, My Account, and Logout. Below this is a search bar and a menu with options: ANALYSTS, INTERACTIONS, CONTENT, EMAIL, PROJECTS, SITE, and HELP. The main header for the Interactions section includes a back arrow, the title 'Interactions', and buttons for '+ Add New Interaction', 'CALENDAR', 'GRID', and 'REPORT'. Below the header, there are additional controls: 'Add Filter(s)', 'Year to date', a search input field, a 'Search' button, 'Load View', 'Save View', and 'Quick Search' buttons.

The main content area features a table with columns: Date, Title, Initiator, Type, Analysts, and Firms. The table is currently in 'GRID' view. At the bottom of the table, there are pagination controls showing '50 items per page' and '1 - 50 of 52 items', along with an 'Apply a bulk update' dropdown menu.

Date	Title	Initiator	Type	Analysts	Firms		
9/11/2015	Nulla facilisi. Praesent et ligula. Pellentesque port	Lucas, Kevin	Strategy Session	Gary Chen	IDC		
9/6/2015	Nulla fringilla pede. Ut cursus. Morbi nequ	Architect, ARInsights	Inquiry	Eric Burgener, Glen Hunt	Current Analysis, Inc., IDC		
9/4/2015	Nulla facilisi. Praesent et ligula	Capps, Ed	Informal Interaction	Liam Eagle, Bob Tarzey	Quocirca Ltd., The 451 Group		
9/3/2015	Aliquam blandit lacinia sem. Nam dolor.	Noble, Dave	Email	Glen Hunt	Current Analysis, Inc.		
9/3/2015	Nullam ac urna. Maecenas et nisi n	Lucas, Kevin	Summit/Conference	Bob Tarzey	Quocirca Ltd.		
9/3/2015	User Management solutions overview and roadmap	Capps, Ed	Briefing	Bob Tarzey	Quocirca Ltd.		
8/29/2015	Nulla fringi	Slovak, Ken	Strategy Session	Clive Longbottom, Paul Parker-Johnson, Bob Tarzey	ACG Research, Quocirca Ltd.		
8/21/2015	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Slovak, Ken	Analyst Request for Information	Eric Burgener, Paul Parker-Johnson	ACG Research, IDC		
	Nullam ac urna.						

# Bulk Updates

## Perform bulk operations

- All finders have a selection of bulk updates
  - Apply to all items
  - Selected items
- Big time saver!
  - Analyst group from interactions
  - Assign Coverages
  - Assign Analysts
  - Assign AR Primary/Initiator
  - Assign Project
  - Delete – Careful!

The screenshot shows the ARdemo web application interface. At the top, there's a navigation bar with the ARdemo logo and links for Recent, My Analysts, Team Links, My Account, and Logout. Below this is a secondary navigation bar with links for ANALYSTS, INTERACTIONS, CONTENT, EMAIL, PROJECTS, SITE, and HELP, along with a search bar. The main content area is titled 'Interactions' and features a '+ Add New Interaction' button and tabs for CALENDAR, GRID, and REPORT. Below the tabs are buttons for 'Add Filter(s)', 'Year to date', a search input, and 'Search'. Further down are 'Load View', 'Save View', and 'Quick Search' buttons. The main data area is a table with columns: Date, Title, Initiator, Type, Analysts, and Firms. The table contains several rows of interaction data. A modal window titled 'Assign Coverages' is open over the table, showing a 'Coverages' section with a '+ New' button, a 'Coverage Name' input field, and a 'Choose ...' dropdown menu. At the bottom of the modal are 'Cancel', 'Update All', and 'Update Selected' buttons. The bottom of the page shows a pagination bar with navigation arrows, a page number '1', a '50 items per page' dropdown, and a '1 - 50 of 52 items' indicator. A dropdown menu at the bottom right shows 'Assign Coverage'.

Date	Title	Initiator	Type	Analysts	Firms
9/11/2015	Nulla facilisi. Praesent et ligula. Pellentesque port	Lucas, Kevin	Strategy Session	Gary Chen	IDC
9/6/2015	Nulla fringilla pede. Ut cursus. Morbi nequ	Architect, ARInsights	Inquiry	Eric Burgener, Glen Hunt	Current Analysis, Inc., IDC
9/4/2015	Nulla facilisi. Praesent et ligula	Capps, Ed	Informal Interaction	Liam Eagle, Bob Tarzey	Quocirca Ltd., The 451 Group
9/3/2015	Aliquam blandit lacinia sem. Nam dolor.	Noble, Dave	Email	Glen Hunt	Current Analysis, Inc.
9/3/2015	Nullam ac urna. Maecenas et nisi n	Lucas, Kevin	Su		
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8/29/2015	Nulla fringi	Slovak, Ken	St		
8/21/2015	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Slovak, Ken	Ar In		
	Nullam ac urna.				

# Filters and Saved Views

Pull frequently used queries with ease

- Filter what you need
- Save as view
  - A view can be considered a Filter Set
- Load a view

The screenshot displays the ARdemo Interactions dashboard. At the top, there is a navigation bar with the ARdemo logo and links for ANALYSTS, INTERACTIONS, CONTENT, EMAIL, PROJECTS, SITE, and HELP. A search bar is also present. Below this, a blue header bar contains the word 'Interactions' and buttons for '+ Add New Interaction', 'CALENDAR', 'GRID', and 'REPORT'. The main content area features a toolbar with 'Add Filter(s)', 'Year to date', a search input, and 'Search'. A 'Firm: IDC x' filter is applied. Below the toolbar are 'Export', 'Columns', and 'Reset Grid' buttons. The main table lists interactions with columns for Date, Title, Initiator, and other details. A dialog box titled 'Update existing view' is open, showing a dropdown menu with 'IDC Interactions - Year to date' selected and an 'Update View' button. Below the dialog, there is a 'Save as new view' section with an input field and a 'Save View' button. At the bottom, there is a pagination bar with navigation arrows, a '50 items per page' dropdown, '1 - 25 of 25 items', and an 'Apply a bulk update' dropdown.

Date	Title	Initiator						
9/11/2015	Nulla facilisi. Praesent et ligula. Pellentesque port	Lucas, Kevin	Strategy Session	Gary Chen	IDC			
9/6/2015	Nulla fringilla pede. Ut cursus. Morbi nequ	ARchitect, ARInsights	Inquiry	Eric Burgener, Glen Hunt	Current Analysis, Inc., IDC			
8/21/2015	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Slovak, Ken	Analyst Request for Information	Eric Burgener, Paul Parker-Johnson	ACG Research, IDC			
8/20/2015	Lorem ipsum dolor	Cooper, Tricia	Email	Iris Feng	IDC			
8/2/2015	Aliquam blandit lacinia sem. Nam dolor.	Slovak, Ken	Research Review	Iris Feng, Glen Hunt	Current Analysis, Inc., IDC			
7/27/2015	Nullam ac urna. Maecenas et nisi nec augue ultrices vol	Lucas, Kevin	Informal Interaction	Gary Chen, Simon Robinson	IDC, The 451 Group			
7/2/2015	Aliquam blandit lacinia sem.	ARchitect, ARInsights	Strategy Session	Gary Chen, Clive Longbottom	IDC, Quocirca Ltd.			
6/16/2015	Proin sed nulla. Nulla hendrerit diam quis felis.	Cooper, Tricia	Research Review	Gary Chen	IDC			

DEMO

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# New Forms

## Organized and validated

- Consistent standardized layout across all forms
- Left/Right organization
  - Data on the left
  - Associated/Assigned items on right
- Client-side validation, back-end validation on key fields
- Enhanced Custom Fields
- Is Dirty Check

The screenshot displays the 'Edit Interaction' form interface. The top navigation bar includes a back arrow, the title 'Edit Interaction', and a 'View Interaction' button. The form is organized into several sections:

- Title & Description:** Contains a 'Title' field with the text 'Nulla fringilla pede. Ut cursus. Morbi nequ' and a 'Description' field with placeholder text.
- Basics:** Includes a 'Type' dropdown set to 'Inquiry', 'Date' (9/6/2015), 'End Date', 'Initiator' (ARchitect, ARInsights), 'AR Primary' (ARchitect, ARInsights), and 'Location' (Sample Interaction).
- Details:** Features a 'Business Unit' dropdown (Corporate), 'Notes', 'Other Participants', 'Visibility' (Public - All of Demo), 'Edit Permission' (Initiator and AR Primary only), and 'Team Calendar' (none).
- Analysts (2):** A list of analysts including Eric Burgener (IDC) and Glen Hunt (CURRENT ANALYSIS, INC.), each with a 'Pick' icon and a red 'X' for removal.
- Participants:** A section for adding participants with a 'Participant Name' field and a 'Choose...' dropdown.
- Coverages (1):** A section for adding coverages with a 'Coverage Name' field and a dropdown showing '(Viadex) IT Services...'. A green checkmark and a red 'X' are visible next to 'Application Delivery'.
- Project:** A section for adding projects with a 'Choose Project...' dropdown.
- Attachments:** A section for adding attachments with a 'Select files...' button.
- Follow-up Tasks:** A section at the bottom with an '+ Add Follow-up Task' button.

At the bottom right, there are 'Cancel', 'Delete', and 'Save' buttons.



# Detail Pages

A Better Way to view your data

- All finder row clicks link to a detail page
- Much easier to view all your data than on a form
- Review your information before updating

The screenshot shows a web application interface for viewing interaction details. At the top, there is a navigation bar with the ARdemo logo and links for Recent, My Analysts, Team Links, My Account, and Logout. Below this is a secondary navigation bar with links for ANALYSTS, INTERACTIONS, CONTENT, EMAIL, PROJECTS, SITE, and HELP, along with a search bar and a settings icon. The main content area is titled "View Interaction" and includes an "Edit Interaction" button. The interaction details are displayed in a card format with a title "Nulla fringilla pede. Ut cursus. Morbi nequ" and a "show more" link. Below the card is a tabbed interface with "Interaction Info" and "Email & Follow-Up" tabs. The "Interaction Info" tab shows details such as Interaction Type (Inquiry), Interaction Date (9/6/2015), Initiator (ARInsights ARchitect), AR Primary (ARInsights ARchitect), Location (Sample Interaction), Notes, Edit Permission (Initiator and AR Primary only), Visibility (Public), Team Calendar, and Other Participants. On the right side, there are sections for Analysts (Eric Burgener and Glen Hunt), Participants (No participants for this interaction), Coverages (Application Delivery), Project (No project for this interaction), and Attachments (No attachments for this interaction). At the bottom, there is a footer with creation and modification dates and a "Show Update History" link.

ARdemo

Recent My Analysts Team Links My Account Logout

ANALYSTS INTERACTIONS CONTENT EMAIL PROJECTS SITE HELP

Search

← View Interaction Edit Interaction

**Nulla fringilla pede. Ut cursus. Morbi nequ**

show more ▼

Interaction Info Email & Follow-Up

Interaction Type Inquiry

Interaction Date 9/6/2015

Initiator ARInsights ARchitect

AR Primary ARInsights ARchitect

Location Sample Interaction

Notes

Edit Permission Initiator and AR Primary only

Visibility Public

Team Calendar

Other Participants

Analysts

Eric Burgener  
IDC  
○ Sed imperdiet, leo ut condimentum molestie, orci libero convallis massa, a gravida tortor purus eget dui

Glen Hunt  
CURRENT ANALYSIS, INC.  
○ Nullam risus purus, lacinia vel, vehicula nec, iaculis accumsan, ipsum

Participants

No participants for this interaction

Coverages

Application Delivery

Project

No project for this interaction

Attachments

No attachments for this interaction

Created by Patricia Cooper on 2/27/2007 | Modified by ARInsights ARchitect on 9/13/2015 Show Update History

# Scheduling Event Management in ARchitect

- Custom Fields with Interaction Types
  - Show what you need for each interaction type
  - Default room selections based on interaction type
- Conflict Resolution
  - On Location
  - Analyst
  - Participant/Executive
- Force time constraints
- Invite Functionality

The screenshot displays the ARchitect web application interface for creating a new interaction. At the top, there is a navigation bar with the ARchitect logo, user links (Recent, My Analysts, My Account, Logout), and a search bar. Below this is a blue header with a back arrow, the text 'New Interaction', and a 'View Interaction' button.

The main content area features a prominent orange warning box at the top with the following text: 'Scheduling Conflict for Analyst Bond, Lucas. Already scheduled at this time for Interaction #373522', 'Scheduling Conflict for Analyst Golightly, Crystal J. Already scheduled at this time for Interaction #373522', 'Scheduling Conflict for Analyst Capps, Ed. Already scheduled at this time for Interaction #373522', 'Scheduling Conflict for Participant Shashank Kulkarni. Already scheduled at this time for Interaction #373521', and 'Scheduling Conflict for Participant Shashank Kulkarni. Already scheduled at this time for Interaction #373522'. To the right of this box are 'Cancel', 'Invite', and 'Save' buttons.

The form is organized into several sections:

- Title & Description:** Contains fields for 'Title \*' (Offsite Lunch) and 'Description \*' (Lunch in Downtown Boston).
- Basics:** Contains fields for 'Type \*' (Event), 'Date' (09/17/2015), 'Time' (12:00PM), 'End Date' (09/17/2015), 'End Time' (1:00PM), 'Initiator' (Bond, Lucas), 'ARPrimary' (Bond, Lucas), and 'Location' (Boston Downtown).
- Analysts (3):** A list of analysts with their names, company names, and icons for removal and editing. The analysts listed are Lucas Bond, Crystal J Golightly, and Ed Capps, all from ARINSIGHTS, LLC.
- Participants (1):** A list of participants with their names and icons for removal and editing. The participant listed is Shashank Kulkarni.
- Coverages:** A section for adding coverages with a 'Coverage Name' field.
- Project:** A section for selecting a project with a '+ New' button.

# Scheduling Reports— All the reports you need

- Analyst Itinerary
- Executive Itinerary
- Briefing Books
- Room Scheduling



## Room Scheduling for: Sheraton Needham Hotel

Wednesday, September 16, 2015

Meeting Scheduled Time	Start Time	End Time	Meeting Title	Location	Meeting Type	AR Lead / Host	Attendees	Firm
8:15 AM	8:15 AM	9:00 AM	Breakfast and Networking	Sheraton Needham Hotel	Event	Lucas Bond	Crystal Golightly	ARinsights, LLC
							Ed Capps	ARinsights, LLC
							Lucas Bond	ARinsights, LLC
							Ray Wang	Constellation Research, Inc.
							Shashank Kulkarni	
9:00 AM	9:00 AM	9:15 AM	Kick-off	Sheraton Needham Hotel	Event	Lucas Bond	Ed Capps	ARinsights, LLC
							Shashank Kulkarni	
9:15 AM	9:15 AM	10:00 AM	Future of Analyst Relations	Sheraton Needham Hotel	Event Presentation	Lucas Bond	Ray Wang	Constellation Research, Inc.
10:00 AM	10:00 AM	10:45 AM	Things To Consider When Implementing ARchitect	Sheraton Needham Hotel	Event Presentation	Lucas Bond	Shashank Kulkarni	
							Jocelyn Eisenberg	
							Ray Wang	Constellation Research, Inc.
10:45 AM	10:45 AM	11:30 AM	Oracle OpenWorld: Analyst Agenda Planning using ARchitect	Sheraton Needham Hotel	Event Presentation	Lucas Bond	Shashank Kulkarni	
							Melody Wood	
							Mike Seback	
							Ray Wang	Constellation Research, Inc.
11:30 AM	11:30 AM	12:15 PM	Leveraging ARchitect to support Telefonica AR way of life	Sheraton Needham Hotel	Event Presentation	Lucas Bond	Shashank Kulkarni	
							Gemma Lianez	
							Ray Wang	Constellation Research, Inc.
12:15 PM	12:15 PM	1:00 PM	Lunch and Networking	Sheraton Needham Hotel	Event	Lucas Bond	Shashank Kulkarni	
							Crystal Golightly	ARinsights, LLC
							Ed Capps	ARinsights, LLC
							Lucas Bond	ARinsights, LLC
							Ray Wang	Constellation Research, Inc.
1:00 PM	1:00 PM	1:45 PM	Analyst Premium Content – Use Cases	Sheraton Needham Hotel	Event Presentation	Lucas Bond	Shashank Kulkarni	
							Crystal Golightly	ARinsights, LLC

DEMO

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# Enhanced Platform

- Bigger Instances across the network
- Still Microsoft stack
  - .NET Framework 4.5
  - SQL 2014
- Redundant Databases with Automatic failover



# So... What's next?

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ROADMAP FOR THE NEXT YEAR



# Fill in the gaps

– Implement new functionalities into all applications across our entire platform

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## OL Plugin Enhancements

- Conflict resolution and
- Other Scheduling functionalities

## Mobile App

- Premium Content

# Enhance certain features – Make things easier to use

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## Analyst Emailer Enhancements

- New Templates
- Editor Enhancements
- Suggested practices for best results

## New Reports

- Starting with Premium Content Summary pages

## Split Vendor Mentions from Coverages

- Reduce clutter in Coverages
- Allow creation of mention related reporting



# New Functionalities

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## Notification System

- Been in the works for a while, finally coming this year

## Analyst Portal

- Publish content for Analysts through the ARchitect Analyst Portal

Audit history on most entities

# Notifications

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## Notification Dash Widget

- Place widget on your dash and select what items you want to be notified about

## Expanded Follow-Up Notifications on Interactions

## Email Notifications (and Reminders)

# ARchitect Analyst Portal

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Publish content to the Analyst Portal

- Decide which Analyst have access to your portal
- Decide which Analyst have access to your specific pieces of content

Analysts will be invited to create a login to access the Portal

Offer Analysts a direct way of keeping their information current and up to date in ARchitect

# What do you want to see? – How can we make ARchitect work better for you?

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What is missing?

How can we make things better?

What enhancements or features do you have the most need for?

Pain points?