

# ARCHITECT TECHNOLOGY UPDATE



WHAT'S NEW IN PAST YEAR  
AND WHAT IS COMING

User Forum 2018  
November 15<sup>th</sup>, Burlingame, CA

# NEW FEATURES ADDED TO ARCHITECT IN PAST 12 MONTHS

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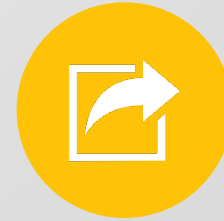
NOTIFICATIONS



ANALYST  
PORTAL  
UPDATES



EVENT  
MANAGEMENT  
ENHANCEMENTS



GOOGLE  
EXPORT



SECURITY AND  
PRIVACY  
UPDATES



# ANALYST NOTIFICATIONS

Select analysts and be notified of any new data associated with them.

Receive notifications when your selected analysts are added to interactions by your AR colleagues.

Receive a notification when your analysts' profiles are updated with new information by ARInsights.

ARInsights

Recent Notifications My Analysts Team Links My Account Logout System Administration

ANALYSTS INTERACTIONS CONTENT EMAIL PROJECTS SITE HELP

Search

## Notifications

Displaying: ☒ Analysts ☐ Interactions Past Month

### 976 New Analyst Notifications

|  |  |   |                      |
|--|--|---|----------------------|
|  | Andrew White<br>GARTNER INC.<br>▲ New            | Data over Substance - For Now<br>Blog Post 08/11/2018   | <a href="#">View</a> |
|  | Bruce Robertson<br>GARTNER INC.<br>▲ New         | Diversity and Inclusion Build High-Performance Teams<br>Blog Post 08/11/2018  | <a href="#">View</a> |
|  | Phil Fersht<br>HFS RESEARCH<br>▲ New             | Brexit will rip out the underbelly of the British economy - and we'll likely never recover<br>Blog Post 07/11/2018    | <a href="#">View</a> |
|  | Steve Banker<br>ARC ADVISORY GROUP<br>▲ New      | The Mechanics Of Strategy<br>Blog Post 08/11/2018   | <a href="#">View</a> |
|  | Allen Bonde<br>FORRESTER RESEARCH, INC.<br>▲ New | Predictions 2019: Digital Business<br>Q Research 06/11/2018   | <a href="#">View</a> |
|  | Gene Phifer<br>GARTNER INC.<br>▲ New             | Adapt Customer Communications to the Demands of the Digital Customer Experience<br>Q Research 06/11/2018              | <a href="#">View</a> |
|  | Rika Narisawa<br>GARTNER INC.<br>▲ New           | Forecast: Enterprise IT Spending for the Utilities Market, Worldwide, 2016-2022, 3Q18 Update<br>Q Research 05/11/2018 | <a href="#">View</a> |
|  | Martina Kurth<br>GARTNER INC.<br>▲ New           | Network Slicing Scenarios and the Impact on OSS/BSS<br>Q Research 06/11/2018  | <a href="#">View</a> |
|  | Tim Payne<br>GARTNER INC.<br>▲ New               | Supply Chain Brief: Digital Planning Requires a Digital Supply Chain Twin<br>Q Research 06/11/2018                    | <a href="#">View</a> |
|  | King-Yew Foong<br>GARTNER INC.<br>▲ New          | Market Insight: How CSPs Can Expand IoT Revenue in Manufacturing<br>Q Research 06/11/2018                             | <a href="#">View</a> |
|  | Tom Enright                                      | Deal or No Deal? How to Prepare Your European Supply Chain for  | <a href="#">View</a> |

### Notification Settings

You are currently following

- 1 Analyst Group
- 2 Analysts
- 9 Interactions

[Manage Notifications](#)



# ANALYST NOTIFICATIONS

Choose what you wish to be notified about. Exclude tweets if you want.

Be notified of any new analysts added to the system.

ARInsights

RecentNotificationsMy AnalystsTeam LinksMy AccountLogoutSystem Administration

ANALYSTSINTERACTIONSCONTENTEMAILPROJECTSSITEHELP

Search

Notification Settings

AnalystsInteractionsCoveragesEmail Frequency

Followed Analysts

+ Add Analyst

Analyst Name

Choose Analyst...

| Name             | Firm                         | Contact Info                        | Firm                                | Interaction                         | Premium Content                     | Quotes                              | Research                            | Blogs                               | Twitter                             |        |
|------------------|------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------|
| Vinay Bhagat     | TrustRadius                  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Remove |
| Ray Wang         | Constellation Research, Inc. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Remove |
| Patrick Moorhead | Moor Insights & Strategy     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | Remove |
| Holger Mueller   | Constellation Research, Inc. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | Remove |
| Merv Adrian      | Gartner Inc.                 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Remove |

10 items per page1 - 5 of 5 items

Followed Analyst Groups

+ Add Analyst Group

Choose...

| Group Name       | Contact Info                        | Firm                                | Interaction                         | Premium Content          | Quotes                   | Research                            | Blogs                               | Twitter                  |        |
|------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|-------------------------------------|-------------------------------------|--------------------------|--------|
| Analyst Universe | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Remove |

10 items per page1 - 1 of 1 items

New Analysts

☒ Get notified when a new Analyst is added

Customer Support

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support@arinsights.com

Send Feedback / Report a Bug

ARchitect

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Logged in as: Ibond

Logout



# INTERACTION NOTIFICATIONS

Keep track of any changes made to your important interactions by your AR colleagues

Easily follow interaction from the interaction detail page

ARInsights

Recent Notifications My Analysts Team Links My Account Logout System Administration

ANALYSTS INTERACTIONS CONTENT EMAIL PROJECTS SITE HELP




Search

## Notifications

Displaying: ☐ Analysts ☒ Interactions

Past Month

### 2 New Interaction Notifications

|   |  |                      |
|---|--|----------------------|
| <br>Invitations to User Forum 2018 DEMO<br><span>New</span>                | Date, Duration and Title were updated<br>Analyst Crystal Golightly was added<br>Updated 09/11/2018 at 00:46 by Lucas Test  | <a href="#">View</a> |
| <br>User Forum Preparation Conversation IMPLEMENTATION<br><span>New</span> | Title and Type were updated<br>Analyst Lucas Bond was added<br>Updated 09/11/2018 at 00:44 by Lucas Test   | <a href="#">View</a> |
| <br>UF Demo Interaction EMAIL  | Description, Date, Location and Title were updated<br>Analyst Crystal Golightly was added<br>Analyst Sree Chadalevada was removed<br>Participant Lucas Test was removed<br>Updated 13/10/2018 at 04:22 by Lucas Bond | <a href="#">View</a> |

1 - 3 of 3 items

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- 1 Analyst Group
- 2 Analysts
- 9 Interactions

[Manage Notifications](#)

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# NOTIFICATION EMAILS

Receive your notifications via email

Decide how often you want to  
receive your notification emails

The screenshot shows the ARInsights web application interface. At the top, there is a navigation bar with links: Recent, Notifications, My Analysts, Team Links, My Account, Logout, and System Administration. Below this is a secondary navigation bar with links: ANALYSTS, INTERACTIONS, CONTENT, EMAIL, PROJECTS, SITE, and HELP. A search bar is located on the right side of this bar. The main content area is titled "Notification Settings" and features four tabs: Analysts, Interactions, Coverages, and Email Frequency. The "Email Frequency" tab is currently selected. Under this tab, there is a section titled "Notification Email Settings" which includes a checkbox labeled "Get Notified Via Email" (which is checked) and a dropdown menu set to "Once Per Day".

The screenshot shows an email notification from ARInsights. The header of the email includes the ARInsights logo, the date and time "Fri 11/9/2018 2:57 AM", the sender "ARInsights <support@arinsights.com>", and the subject "Notifications". The email is addressed to "Lucas Bond". The main body of the email is titled "Notifications" and contains a section for "Analyst Notifications". This section lists three analysts with their profile pictures, names, and affiliations, along with the reason for the notification.

| Analyst                                     | Reason   |
|---|--|
| Dave Bartoletti<br>Forrester Research, Inc. | Added to <a href="#">1 Blog</a> and <a href="#">1 Research</a> |
| Charles Betz<br>Forrester Research, Inc.    | Added to <a href="#">1 Research</a>                            |
| W. Roy Schulte<br>Gartner Inc.              | Added to <a href="#">1 Research</a>                            |



## PORTAL UPDATES

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Significant updates to the Analyst Portal to give it the look and feel of your own brand

- Categories of Interest
- Content Alerts
- Two and one column layouts
- Banner Images
- Enhanced Content Pages



# PORTAL CATEGORIES OF INTEREST

Customize categories for your analysts

Pre-configure or let them configure what they are interested in

The screenshot displays the 'Manage Analyst Categories' page in the ARInsights portal. The top navigation bar includes links for Recent, Notifications, My Analysts, Team Links, My Account, Logout, and System Administration. Below this, a secondary navigation bar lists ANALYSTS, INTERACTIONS, CONTENT, EMAIL, PROJECTS, SITE, and HELP, along with a search bar. The main heading is '# Manage Analyst Categories'. The breadcrumb trail reads 'Portal Admin - Manage Analyst Access - Manage Analyst Categories'. There are 'Cancel' and 'Save' buttons at the top right. The 'Alerts' section contains a tip: 'Enable Content Alerts to send automated emails to Analysts containing the latest portal content items from their selected categories.' Below this, 'Content Alerts Enabled' is checked, and 'Frequency' is set to 'Weekly'. The 'Categories' section has a tip: 'Select the categories that you wish to display to the Analyst by default. The Analyst will have access to all categories, but will see these by default.' Under 'Categories of Interest', there is a list of categories with checkboxes. 'All Categories' is unchecked. 'ARchitect' is checked, and its sub-items are: 'LinkedIn' (checked), 'Twitter' (unchecked), 'Facebook' (unchecked), 'Vimeo' (unchecked), 'Sales/ Biz Dev' (checked), 'User Forum' (checked), and 'Demo' (checked). 'Partners & Clients' is checked, and its sub-items are: 'Partner' (checked), 'Client' (checked), 'EY' (checked), 'Moor Insights' (checked), 'Samsung' (checked), 'DataStax' (checked), 'Lopez Research' (checked), 'Cognizant' (checked), 'IBM' (checked), and 'Wipro' (checked).

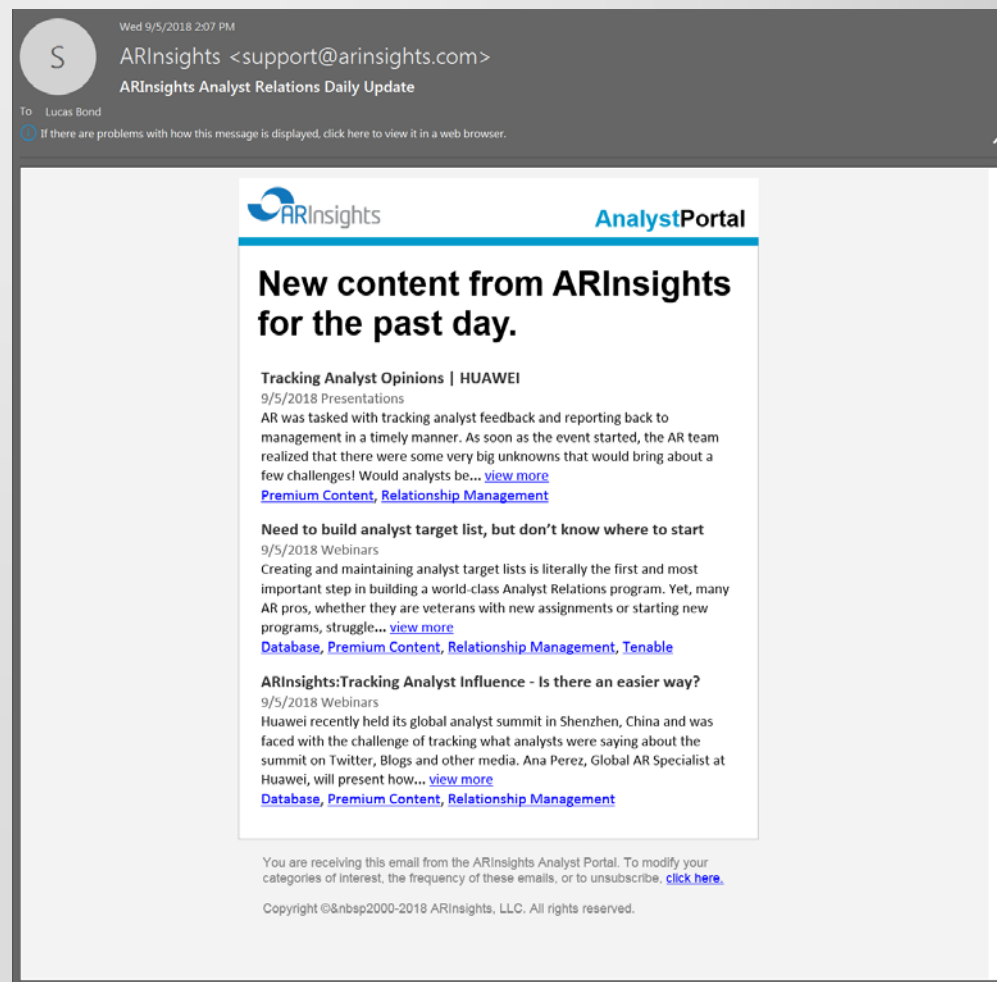




## PORTAL CONTENT ALERTS

Analysts can decide to receive daily, weekly or monthly updates from your portal

Updates are sent out in branded HTML emails





# PORTAL CATEGORY BANNER IMAGES

ARInsights

Recent **Notifications** My Analysts Team Links My Account Logout System Administration

ANALYSTS INTERACTIONS CONTENT EMAIL PROJECTS SITE HELP

# Premium Content

Portal Admin - Manage Categories - Category Edit

Cancel Delete Save

Category Name and Group

Category Name \* Premium Content

Category Group \* Architect Products

Category Banner and Featured Content Item

Banner Image 

Select File

premium-traffic1\_banner.png

Category Featured Item

ARInsights:Tracking Analyst Influence - Is there an easier way?

Permissions

☒ Only Site Admin(s) Can Post Content

☐ Specify additional user permissions for this category


| User                     | Can Post Content                    | Receives Contacts                   |                    |
|--------------------------|-------------------------------------|-------------------------------------|--------------------|
| Avallion, Aaron          | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Site Administrator |
| Bakovich, Cindy          | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Site Administrator |
| Bond, Lucas              | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Site Administrator |
| Capps, Ed                | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Site Administrator |
| Cooper, Patricia         | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Site Administrator |
| Gadgil, Subodh           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Site Administrator |
| Golightly, Crystal       | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Site Administrator |
| Ham, Minae               | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Site Administrator |
| IntegrationTester, ariul | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Site Administrator |
| Kulkarni, Shashank       | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Site Administrator |

ARInsights


Lucas Bond - Logout AnalystPortal

HOME CONTENT CONTACT AR

Portal Home > Premium Content



Featured Premium Content Content



ARInsights:Tracking Analyst Influence - Is there an easier way?

9/5/2018 Webinars

Huawei recently held its global analyst summit in Shenzhen, China and was faced with the challenge of tracking what analysts were saying about the summit on Twitter, Blogs and other media. Ana Perez, Global AR Specialist at Huawei, will present how... [view more](#)

Database, Premium Content, Relationship Management

Filter

☐ All Categories

☐ Architect

☐ Partners & Clients

☐ Architect Products

☒ Premium Content

☐ Event Management

☐ Database

☐ Analyst Portal

☐ Relationship Management

Sort by **Date**

Tracking Analyst Opinions | HUAWEI

9/5/2018 Presentations

AR was tasked with tracking analyst feedback and reporting back to management in a timely manner. As soon as the event started, the AR team realized that there were some very big unknowns that would bring about a few challenges! Would analysts be... [view more](#)

Premium Content, Relationship Management

Need to build analyst target list, but don't know where to start

9/5/2018 Webinars

Creating and maintaining analyst target lists is literally the first and most



## NEW EVENT DETAIL PAGE

Manage your entire event from one page

ARInsights

Recent Notifications My Analysts Team Links My Account Logout System Administration

ANALYSTS INTERACTIONS CONTENT EMAIL PROJECTS SITE HELP

Search

User Forum 2018

Edit Event New Interaction

14 November 2018 - 16 November 2018  
(UTC-08:00) Pacific Time (US and Canada); Tijuana  
Sample Event

Analysts Participants Locations Interactions RSVPs

CONFIGURE AGENDAS RUN AGENDAS RUN GAP REPORT View in Finder

| Analyst           | Firm            | Interaction Count | Agenda | RSVPs | Interactions |
|-------------------|-----------------|-------------------|--------|-------|--------------|
| Patricia Cooper   | ARInsights, LLC | 9                 | Agenda | RSVPs | Interactions |
| Ed Capps          | ARInsights, LLC | 9                 | Agenda | RSVPs | Interactions |
| Shashank Kulkarni | ARInsights, LLC | 11                | Agenda | RSVPs | Interactions |
| Crystal Golightly | ARInsights, LLC | 9                 | Agenda | RSVPs | Interactions |
| Ed Melendez       | ARInsights, LLC | 9                 | Agenda | RSVPs | Interactions |
| Cindy Bakovich    | ARInsights, LLC | 9                 | Agenda | RSVPs | Interactions |
| Eric Nahmani      | ARInsights, LLC | 10                | Agenda | RSVPs | Interactions |
| Lucas Bond        | ARInsights, LLC | 9                 | Agenda | RSVPs | Interactions |
| Aaron Avallon     | ARInsights, LLC | 9                 | Agenda | RSVPs | Interactions |
| Andy McLandrich   | ARInsights, LLC | 9                 | Agenda | RSVPs | Interactions |

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# CUSTOMIZABLE AGENDAS

Add event specific logos

Include extra info at the top of each Agenda

Fully customizable HTML content

Page breaks to include multiple pages if needed

ARInsights

Recent Notifications My Analysts Team Links My Account Logout System Administration

ANALYSTS INTERACTIONS CONTENT EMAIL PROJECTS SITE HELP

Search

## Edit Analyst Agenda

View Event Edit Event

Itinerary configuration has been saved. Cancel Save

### Header Configuration

Title  
ARchitect User Forum 2018 Agenda

### Preamble

**Location**  
Hyatt Regency San Francisco Airport  
1333 Bayshore Hwy  
Burlingame, CA  
United States

**Cost**  
FREE - The event is free for all levels of AR professionals, whether you currently use ARchitect or not.

### Colors

Title and Preamble Background Color

Header Text Color

Header Background Color

Date Text Color

Date Background Color

### Columns

Available

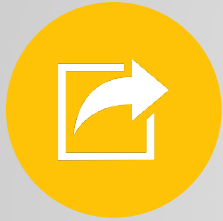
- Interaction Type
- sales cycle
- test - text

Selected

- Start Time
- End Time
- Interaction Title
- Summary
- Location
- Attendees
- SK Test

Agenda Preview (Click save to update the preview)

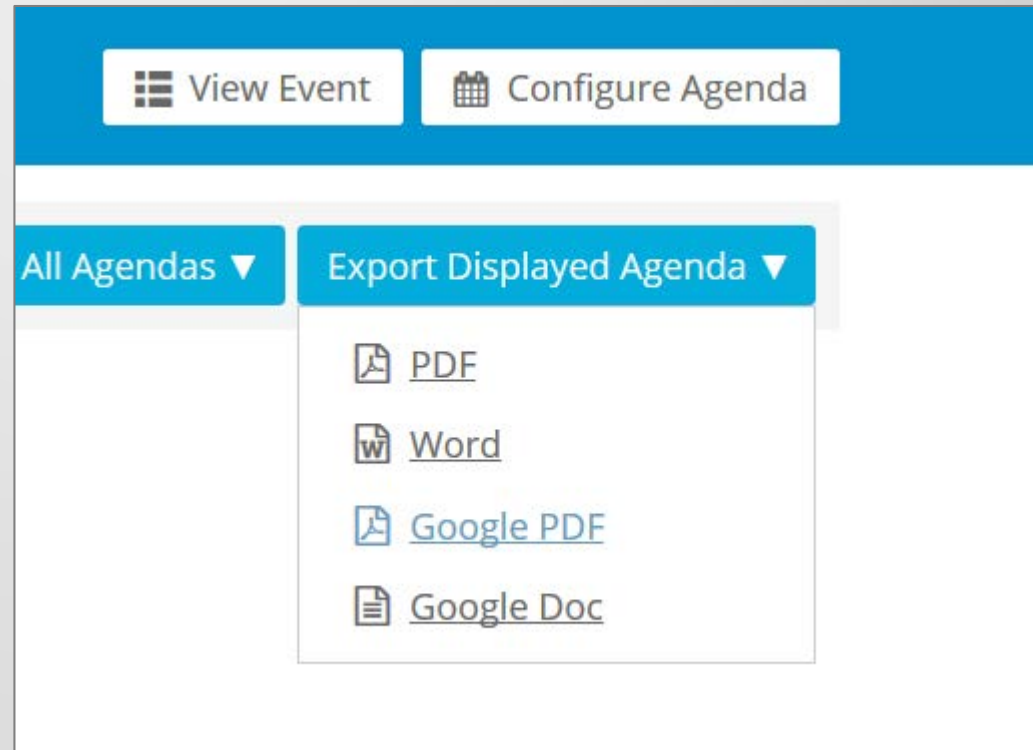




## GOOGLE EXPORT

Most reports including EM Agendas, word briefing books and grid exports can be exported to Google Docs

SSRS Reports can be exported only to Google PDF







## PRIVACY & SECURITY UPDATES

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- Hired Navigant Research to help us make the changes to comply with GDPR
- Updated our Privacy Policy and data processing agreements
- Annual penetration and monthly vulnerability scans
- Adding to your company email DMARC policy to improve email deliverability
- Auto logout if user is inactive for 2 hours
- Analysts can unsubscribe from emails



# NEW FEATURES COMING TO ARCHITECT

TECHNOLOGY ROADMAP FOR 2019 AND BEYOND



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## Many New Features



### SSO Availability

- Log into ARchitect with your employer's Single Sign On



### Premium Content

- Analyst LinkedIn activity in Premium Content



### Portal Updates

- As more companies launch, we expect more analyst feedback



### Notification Updates

- Get notified when any new content is associated with your selected coverages



# Emailer Updates

## Improvements to Analyst Emailer UI

- Step by step process
- Improved recipient selection (including display of unsubscribe status)

## New templates

- Templates with site logo already included
- Mobile friendly templates



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## Coverage Aliases

Different spellings and abbreviations of the same coverage will all be lumped together

Select preferred version for your site

Increase reliability of topical coverages

Improved search of coverages in Premium Content





# Reporting Updates

Migrate to  
business  
intelligence  
platform

Embed  
custom  
reports into  
ARchitect UI  
for reuse

Use  
dashboard-  
style reports

Improve  
performance  
with a  
dedicated  
reporting  
cluster



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## Event Management Updates

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Capacity restriction by location

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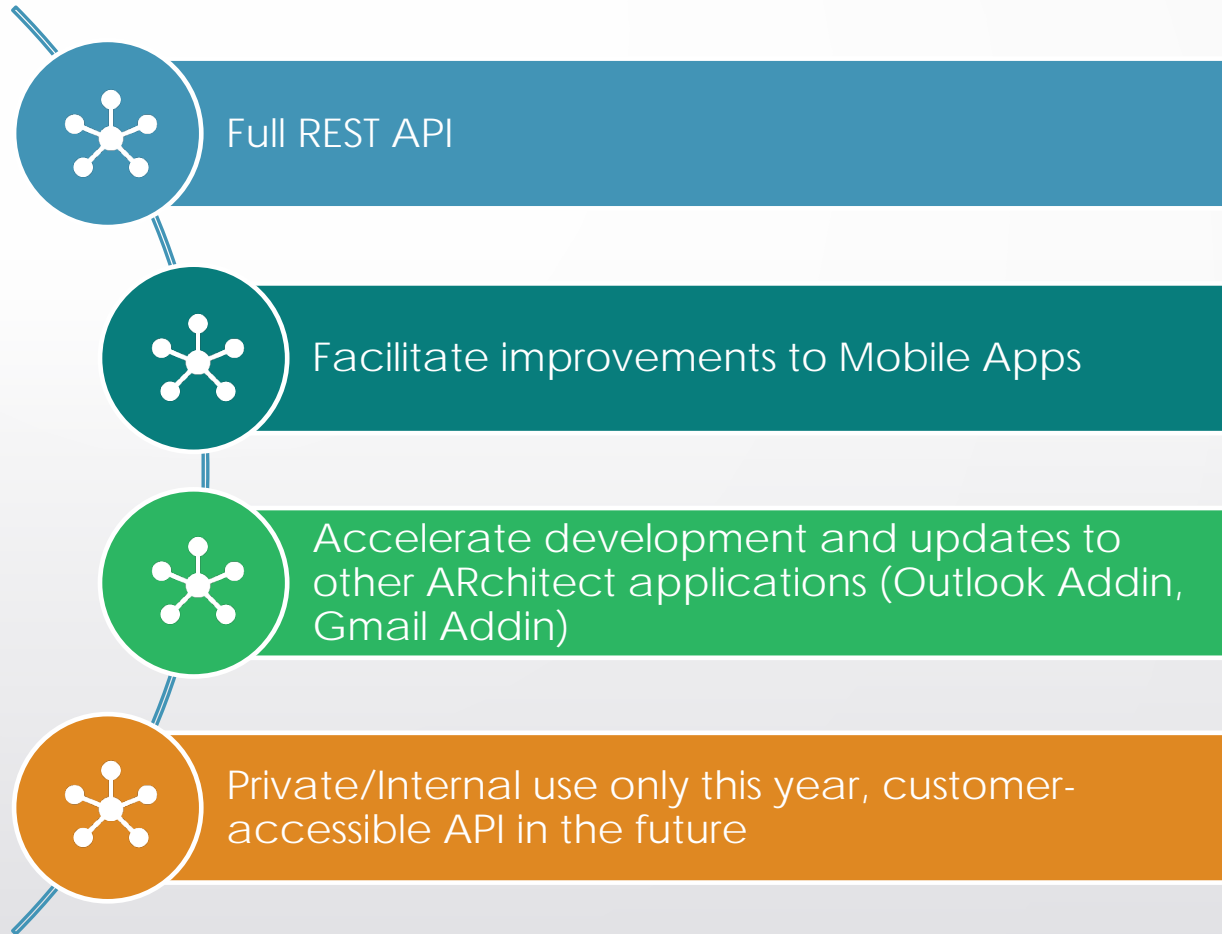
Attendance restriction by location

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Agenda Template improvements



# API Development





# ALWAYS LOOKING FOR FEEDBACK FROM OUR CUSTOMERS

OPEN DISCUSSION - TELL US WHAT YOU  
WANT TO SEE IN ARCHITECT