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## RELEASE NOTES

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Release 1.2

September 4<sup>th</sup>, 2017



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# 1 New Features

## 1.1 Overview

The new features in this release of CurateFx focus on two areas - first helping users to further understand and manage the complex relationships, impacts and dependencies of Ecosystem Stakeholders, and second to make it easier for users to find the Frameworkx elements that are most relevant for their projects.

1. **Stakeholder Map:** Knowing the roles, responsibilities, impacts and dependencies associated with all Stakeholders is essential for the definition and management of an effective Ecosystem. The new Stakeholder Map provides a simple but powerful visual spider web diagram of the modules each stakeholder is assigned to and allows the user to clearly see those items that a stakeholder has not been assigned to.
2. **Frameworkx Search:** The new Search functionality in the Frameworkx Mapping module enables users to quickly find the specific elements that they need at any level within each of the Frameworkx Models simply by typing in freeform text. Once found the elements can be color tagged or assigned with the relevant stakeholders.

In addition this release has several enhancements to Frameworkx filtering that will increase usability and productivity with this module, and also has an important enhancement to the Export capability to include exports in CSV format to allow easy integration with Enterprise Architecture, project management or other tools.

These new features enable users to benefit in several ways:

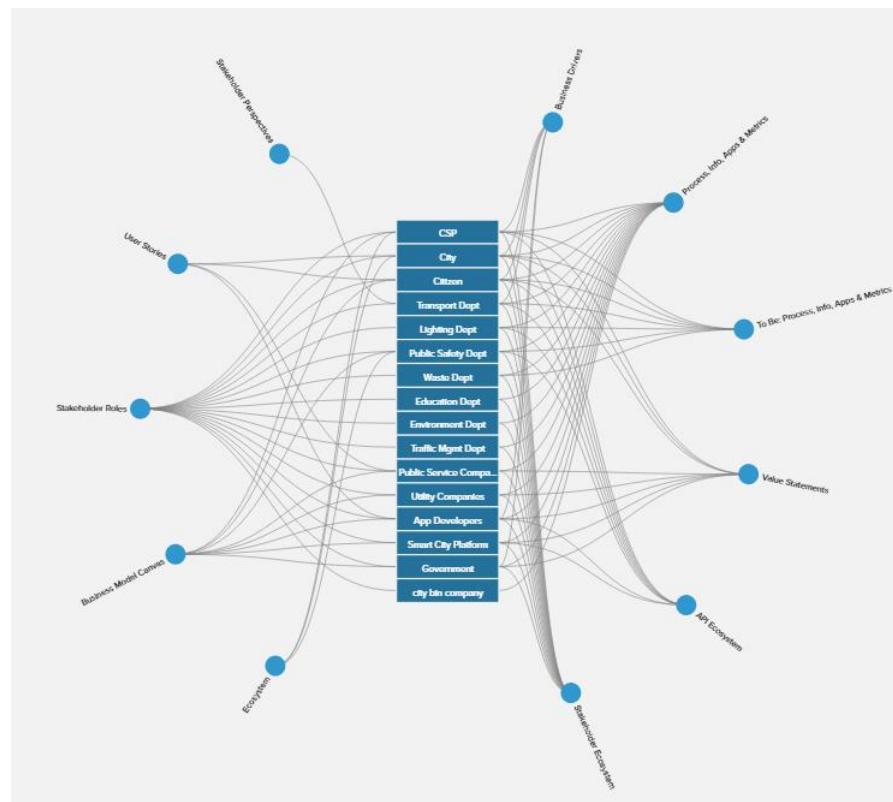
- As projects get complex, it becomes challenging to ensure that all stakeholders have been thoroughly considered in any given business scenario. The new graphic Stakeholder Map will provide fast and easy access to this information, accelerating project progress and time to completion
- Scoping projects can be a process that requires many iterations and input from many parties. The new search function in Frameworkx and the enhancements to the filtering capability will help to assure that scoping is thorough and complete, eliminating missed elements and rework, ultimately reducing project cost.
- The ability to seamlessly integrate information from one tool to another is key to keeping projects moving. CurateFx creates a strong bridge between business and IT by enabling its modules including Frameworkx-based scoping information to be exported in a standard and portable format. The details captured in the export eliminate delays due to recreating decisions and information that has already been defined.

## 1.2 View Assignments through the Stakeholder Map

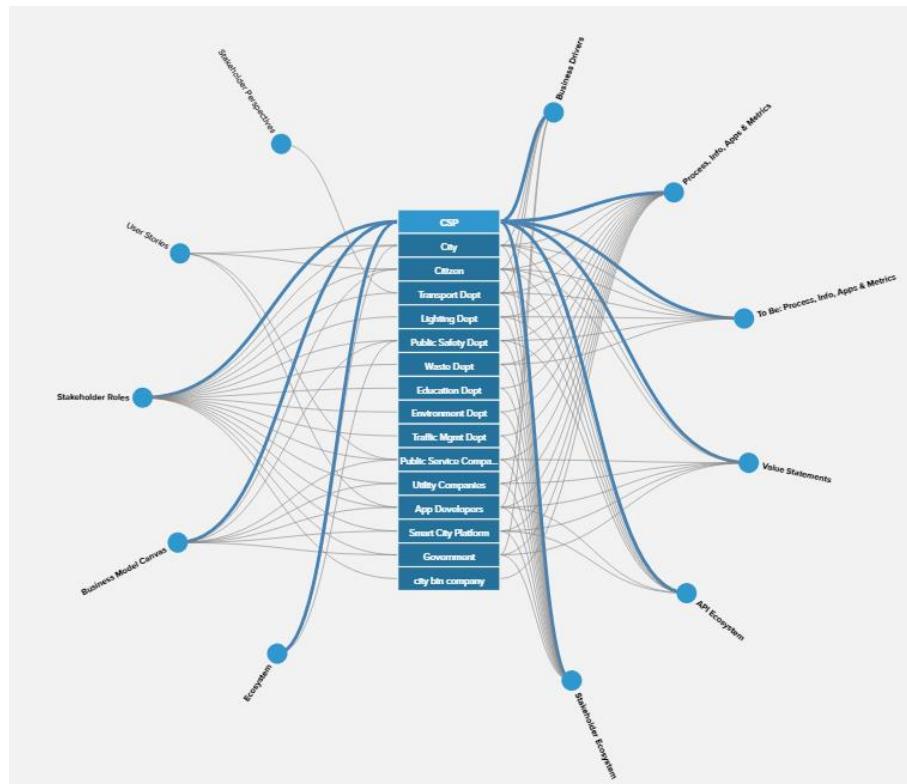
It is essential to understand the roles and responsibilities of all Stakeholders within your Ecosystem. Within each Ecosystem Project a stakeholder may be assigned to numerous modules, play a variety of roles and have a wide range of responsibilities. In the Stakeholder module, the new Stakeholder Map provides users with a highly visual and interactive method to view stakeholder assignments, identify assignment gaps and to navigate to relevant modules.

The screenshot shows a CurateFx stakeholder record for 'CSP'. At the top, there's a navigation bar with the CurateFx logo, a 'SUCCESSFUL SMART CITY PROJ...' button, and a 'Properties' tab. Below the navigation is a header with 'Stakeholders: ECOSYSTEM STAKEHOLDERS', '0 Comments', and an 'Upload CSV' button. A red box highlights a 'STAKEHOLDERS MAP' button. The main content area has sections for 'STAKEHOLDER' (with 'CSP') and 'DESCRIPTION' ('Communications Service Provider'). To the right, there's a 'ROLES' section with multiple dropdown menus: 'Enterprise', 'City', 'User', 'City', and 'External Partner' (with 'Platform' and 'Government' also listed). There are also icons for adding (+), editing (pencil), and deleting (trash).

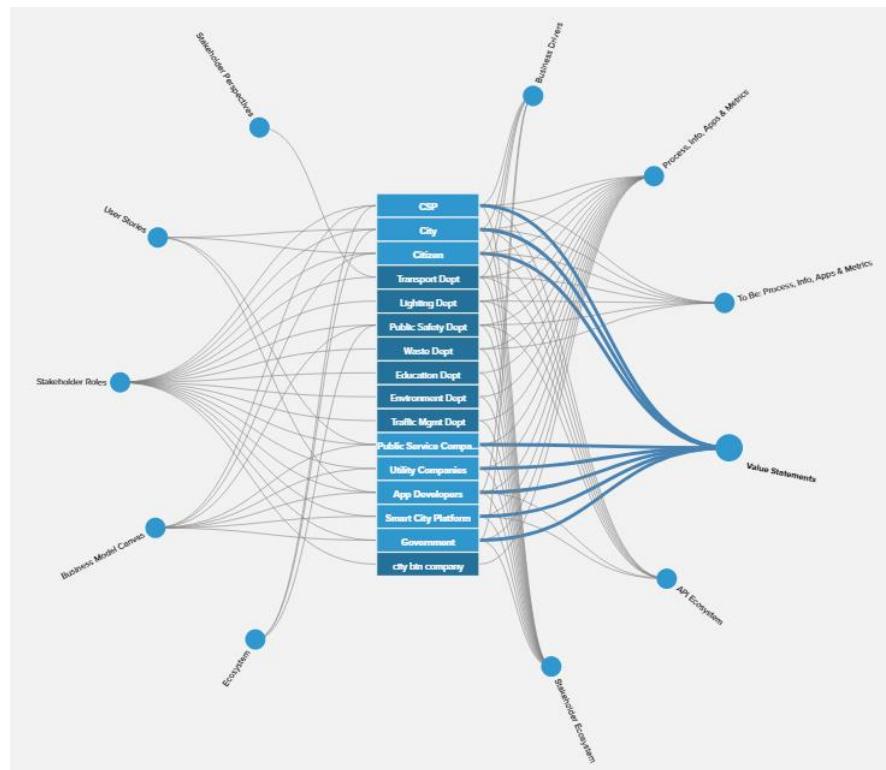
The Stakeholder Map lists all of the Project Stakeholders in the central area and the names of all modules that have stakeholders assigned around the outside



By clicking on a Stakeholder or by hovering the mouse over a Stakeholder name, the links to each of the modules that have the stakeholder assigned are highlighted.



When you hover over a Module name it will also display which Stakeholders have been assigned.



Clicking on a Module name will navigate directly to the module. Using the browser back button will return to the Stakeholder Map view.

Clicking on the Stakeholder List button will return to the list of Stakeholders

### 1.3 Text Search Framework Elements

There is a large amount of useful information in the Framework Modules but it is not always easy for users to quickly find the information that they need. The new Find feature within the Framework Mapping module allows users to search all levels within the eTOM, SID or TAM Framework Modules for the item(s) they are looking for.

As the User types the search criteria, the top ten search results are displayed showing the Name, Domain and Level. As users continue typing the criteria the search results will be updated. Multiple pages of results are shown if more than 10 results are found.

SEARCH FRAMEWORK		
Search: customer experience		
Name	Domain	Level
Customer Experience Management	Customer Domain	1
Customer Experience Management Strategy and Planning	Customer Domain	1
Customer Experience Maturity Assessment	Customer Domain	2
Measure Customer Experience Improvements	Customer Domain	3
Recommend Customer Experience Improvement	Customer Domain	4

By clicking on a specific item within the search results the user is quickly taken to the selected item, the path for the selected item is displayed and the search results are hidden.



The Search results continue to remain available which allow the user to navigate to a different item.

To clear the search results, you can clear the existing search criteria text or navigate to a different Framework Model.

This search functionality will be extended to the Metrics model in an upcoming release.

## 2 Enhancements

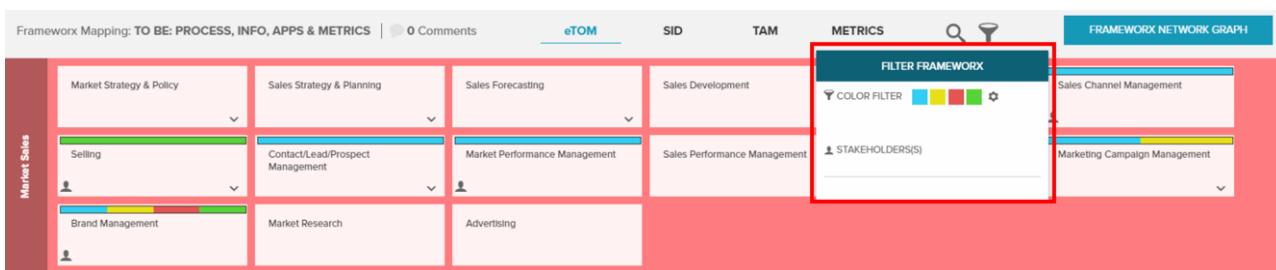
### 2.1 Overview

This release includes enhancements to the Filtering functionality within the Frameworkx Mapping, support the export of CurateFx project data into CSV format and improvements to the Project Dashboard.

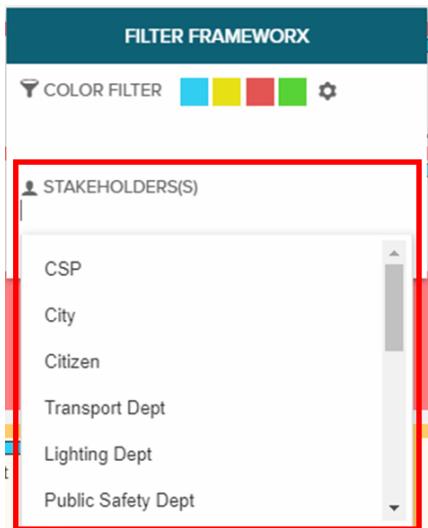
1. Frameworkx models can now be filtered based on assigned Shareholders to quickly identify and view the Frameworkx elements that are assigned to stakeholders.
2. To assist users with integrating CurateFx data with their EA tools the Project Export now has the capability to export data from every module into a CSV format.
3. Identify gaps in your project by displaying the status of Suggested Module Types on the Project Dashboard.

### 2.2 Filter Assigned Stakeholders in Frameworkx Mapping Module

The ability to filter Frameworkx elements has been enhanced so that Assigned Stakeholders can now be selected as a Filter Criteria. Clicking the Filter button will now provide the user with the options to apply Color and Stakeholder Filters.



Clicking within the Stakeholder Filter will enable the user to select the stakeholder(s) they wish to filter by;

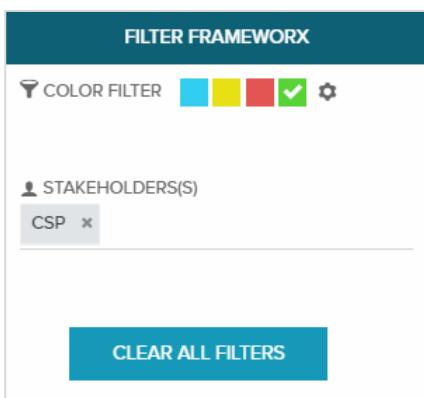


STAKEHOLDERS(S)
CSP
City
Citizen
Transport Dept
Lighting Dept
Public Safety Dept

Only the items assigned to the selected stakeholder(s) are displayed.

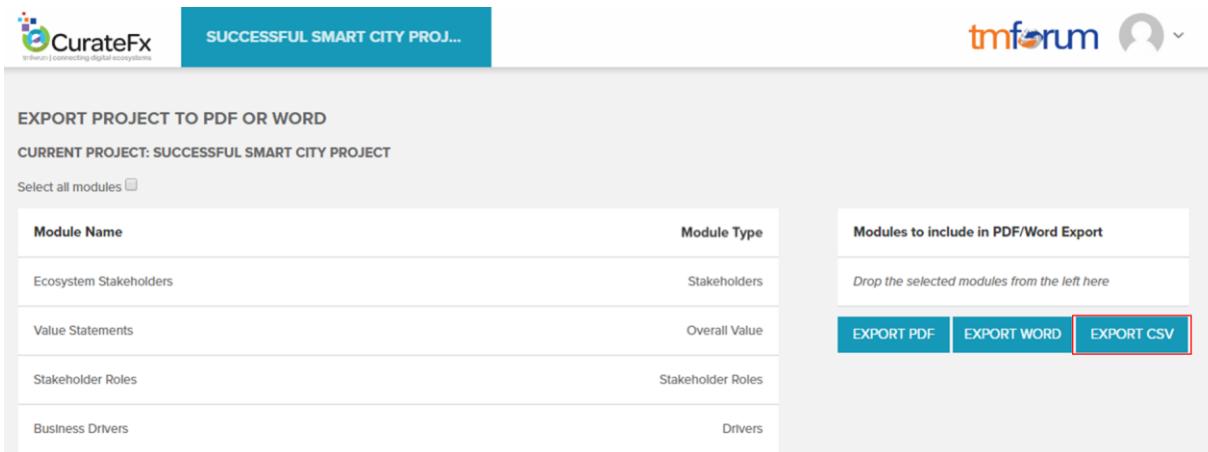


When a filter criterion is applied to the Color Tag and the Stakeholder CurateFx will display the elements that meet both criteria.



## 2.3 Export Data to CSV format

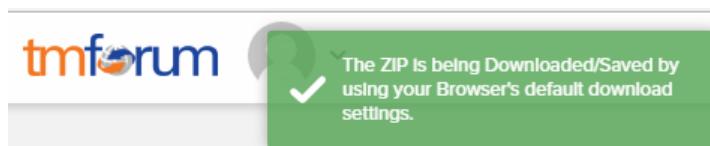
The Project Export feature within the Project properties now includes a new option to export selected modules into a CSV format. This feature will be useful for users who would like to import data from CurateFx into their existing Enterprise Architecture, project management or other tools.



The screenshot shows the 'PROJECT PROPERTIES' section for 'SUCCESSFUL SMART CITY PROJ...'. It includes a 'EXPORT PROJECT TO PDF OR WORD' section with a table of modules and their types, and a 'Modules to include in PDF/Word Export' section with a 'Drop the selected modules from the left here' area and three export buttons: 'EXPORT PDF', 'EXPORT WORD', and 'EXPORT CSV' (which is highlighted with a red border).

Module Name	Module Type
Ecosystem Stakeholders	Stakeholders
Value Statements	Overall Value
Stakeholder Roles	Stakeholder Roles
Business Drivers	Drivers

When the CSV Export button is clicked, CurateFx will create a separate CSV file for each module and then combine these into a single .ZIP file, which is downloaded to the users local machine using the browser's default download settings. Details of color tags and stakeholder assignments are included in the Framework module export.



## 2.4 Display Status of Suggested Module Types

A project is created based on an existing Project Template such as the Business Scenario Template. To guide users through the methodology of completing the template, CurateFx provides feedback on the Project Dashboard on the number of Suggested Module Types at the project level and for each individual section.

The screenshot shows the header of a 'SAMPLE BUSINESS SCENARIO PROJECT'. It includes the project type ('Business Scenario Template'), framework version ('16.5'), sharing status ('Shared: Private'), comment count ('0 Comments'), and a red box highlighting '10 Suggested Module Types'. Below the header, under 'SCENARIO SETTINGS', there is another red box highlighting '5 Suggested Module Types'.

This release provides the user with further visibility to which of the Suggested Module Types have been created and also on those Suggested Module Types that have not yet been added to the project. This information is provided at the project level by placing the mouse over the Suggested Module Types in the Project Header, a list of all Suggested Module Types is displayed;

The screenshot shows the header of a 'SAMPLE BUSINESS SCENARIO PROJECT' with a detailed list of suggested module types. A red box highlights '10 Suggested Module Types' in the header. The list includes: Stakeholders, Stakeholder Roles, Drivers, Overall Value, Problem Statements, Business Canvas, Ecosystem Designer, Framework Mapping, DSRA Mapping, and Lessons Learned. Some items are in green (created) and some in black (not yet added). A legend indicates: '0 Values' and '0 with Stakeholders assigned'.

Suggested Module Types that have already been added are displayed in Green and those that have not yet been added are displayed in Black. The dividing lines within the list are for each of the Project Sections.

By placing the mouse over the Suggested Module Types for a specific section to provide details for that section only.

The screenshot shows the header of a 'SAMPLE BUSINESS SCENARIO PROJECT' with a detailed list of suggested module types for the 'Stakeholders' section. A red box highlights '5 Suggested Module Types' in the header. The list includes: Stakeholders, Stakeholder Roles, Drivers, Overall Value, and Problem Statements. Some items are in green (created) and some in black (not yet added). A legend indicates: '0 Values' and '0 with Stakeholders assigned'.

### 3 Fixes

The following minor issues have been corrected in this release.

#### 3.1 Read Only Users cannot change the color of an item in the Ecosystem Designer

When viewing an ecosystem designer module in a read only view the viewer should not have the ability to change the color or an item.

#### 3.2 The first Driver Item should not be automatically expanded

In an existing Drivers Module that already contains items, the first driver item should not automatically be expanded, only the headings should be displayed when there is more than one item. This makes the display within modules that have listed items consistent.

#### 3.3 API Detail Buttons are hidden when no links are provided

On the API Details dialog box which is available in the Ecosystem Designer and DSRA Modules, the Link Buttons should be hidden for any APIs that do not have links to external sources (i.e. Swagger, Confluence, etc.) defined.

#### 3.4 Saved Indicator on Canvas needs to be more visible

The saved indicator on Canvas modules is moved so that it is not obscured by the Message/Feedback Button.

#### 3.5 Frameworx Mapping Pop up Text updated

The pop up text that appears when a user enters the module for the first time needs to be updated to include the new Color Tag Feature features.

#### 3.6 Consistent Font size used for all modules in Word Export

The font size in the Word Export file was made consistent for the following Modules;

- Business Canvas
- Platform Model Canvas
- Lean Canvas
- SWOT Canvas
- DSRA Mapping (Heading section)