

TransparentChoice Micro-Guide

Happy New Year... Happy
New Features





Our focus for this release is to support the Business User

Business Users are people involved in prioritization who request projects, contribute data, or review analysis

- Workspace users are people with ‘full’ access who can edit any data, set up models & build reports
- Business Users currently work via URLs sent out on email: **My Dashboards** is our new feature to improve User Experience and Security

Business Users can include anyone you chose, but we recommend:

- Leadership, to weight criteria and read reports
- Requesting teams, who ask for projects & score
- Delivery teams, who estimate effort & use reports
- Finance teams who analyze business cases

Building on Business Users... our latest release is designed to make it easier to collaborate securely



Brilliant Prioritization has to be a team sport – My Dashboard is a personalized access points for people who get multiple URLs



Security matters, so we're making our URLs more secure to access and easier to control



Automation for data collection helps turn prioritization into a scalable, sustainable activity so you lock in best practice – we'll share tips



Accountability in prioritization is the basis for effective portfolio governance – every data point needs an owner



Think about how to connect functionality to drive value... we've included a couple of 3-ish minute explainers with examples to get you started

If you like what we're saying... we're here to help you get your colleagues on-board too



Book a free **demo call for your workspace user team** to get a walk through of functionality (new and old) & advice on how to optimize your models



Book a free **governance call with your executive sponsor** to understand how prioritization can increase the ROI of your portfolio



Watch & share our **15-minute explainer**





Shareable URLs are a key feature for our software – they connect Business Users to prioritization

Business Users don't currently have access to the software

- All engagement is via URLs generated by Workspace User

URLs are used to collect data for prioritization

- New Project Requests
- To Do Lists (via Reports)
- Assessments
- Criteria weights survey

URLs are also used to share data in Reports

Business Users



New Project Request Pages

Collect Data via To Do Lists

Score Projects using Assessments

Workspace users manage access

- Kanban
- Set Up Assessments
- Setup & share Forms
- Build & share reports

Access Reports



My Dashboard brings all personalized data capture into one place via a personalized portal – for Business Users

One link for for all your data!



Input needed

Reports

- Task Checker for Project 1 from Project...
- Strategic Alignment Review - IT from I...
- Task Checker for Project 1 COPY from ...

Request pages

- New request page from IT and Commer...

Prioritization panels

- Criteria weighting from Airline Proj... ▲
- Criteria weighting from Airline Proj... ■
- Executive team from OLD Automot...
- Criteria weighting from test3_a223... ▼

Assesements panels

- Other Projects from New Auto Mo... ▲
- dummy from New Auto Model ■
- Team 1 Assessments from Airline P... ▼
- Show Images from Demo Model M... ▼

Reports – use Reports / To Do Lists shared with you

Request Pages – ask for new Projects for a portfolio

Prioritization Panels – See open criteria weights surveys

Assessments Panels – See open scoring surveys*

*note this does not currently pick up surveys form legacy scoring



Start by setting up Business Users in People Section

1. Single data entry point for all People who need to answer surveys, fill in forms or read reports
2. Add Tags to create collective permissions (e.g. all the sales team, all leadership etc)
3. Use quick link to send account request to Admin
4. Pending requests get a Grey Icon, Approved Accounts a Green one

The screenshot shows a 'People' management interface. At the top, there is a '1 People' header and a '2' button next to 'Manage tags' and an 'Add' button. Below the header, there are tabs for 'Active' and 'Archived', a search bar, and a 'Filter by: Show all' dropdown. The main content is a list of users:

Name	Email	Role	Actions
Business Person 1	business person_1@tchdummy.com	Business Leader	Actions
Business Person 10	business person_10@tchdummy.com	Business Leader	Actions
Business Person 11	business person_11@tchdummy.com	Business Leader	Actions
Business Person 12	business person_12@tchdummy.com	Business Leader	Actions
Business Person 13	business person_13@tchdummy.com	Business Leader	Actions

Below the list, there is a detailed view of a user named 'dan'. The user's name is 'dan' and their email is 'dan.dures75@gmail.com'. A '4' is placed next to the name. Below this, there is another entry for 'dan' with the same email, but with a green icon next to the name, indicating an approved account. A '3' is placed next to the 'Request an account' option in the actions menu.

The actions menu for the user 'dan' includes:

- Edit
- Request an account
- Reset access links
- Archive
- Delete

At the bottom right, there is an 'Actions' dropdown button.



Use Admin Panel to process Business User requests

Admin approves request, and triggers email with password (contact us if you need Admin access)

As a default they become a Business User: they are only able to see data released to them via URL

User acquired Green Icon once account is approved

TransparentChoice organizational dashboard Manage organizations

[Add user](#) [Add workspace](#)

Type to search for user, workspace or portfolio in your organization...

TransparentChoice
System admin: janusz@transparentchoice.com
Version: 2023.11.1-3713+e527f1bbaeacbb7099be0560c25eafb720eb694c
[Manage](#) [Branding](#) [SSO](#)

Usage stats

Users	8
Workspaces	13
Portfolios	107
Projects	4756

1 Account requests 8 Active Users 5 Global admins 0 Locked users 2 Sessions

Email Display name

1	dan.dures75@gmail.com	dan
---	--	-----

Manage user access request

dan
dan.dures75@gmail.com
Requested by Dan Dures
[Accept](#) [Reject](#)

dan
 dan.dures75@gmail.com



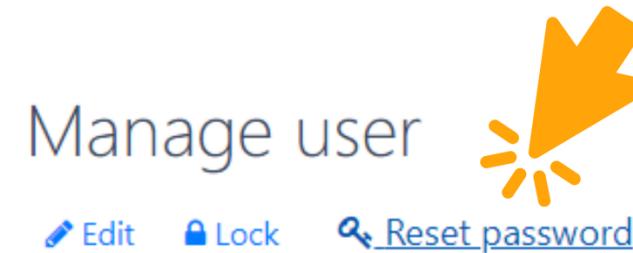
System Generated Emails contain password & link to instance

Link is the same for all users – but content is personalized in My Dashboard (note, this is the same link for workspace users)

Watch out for Junk Mail – check your filters, or speak with IT about white listing this domain

If all else fails use Admin panel to reset password password & copy it to yourself

Note, this access enables you to upgrade access to Workspace User



dan
dan.dures75@gmail.com

User

Manage roles

Reset password

Revoke sessions

Delete

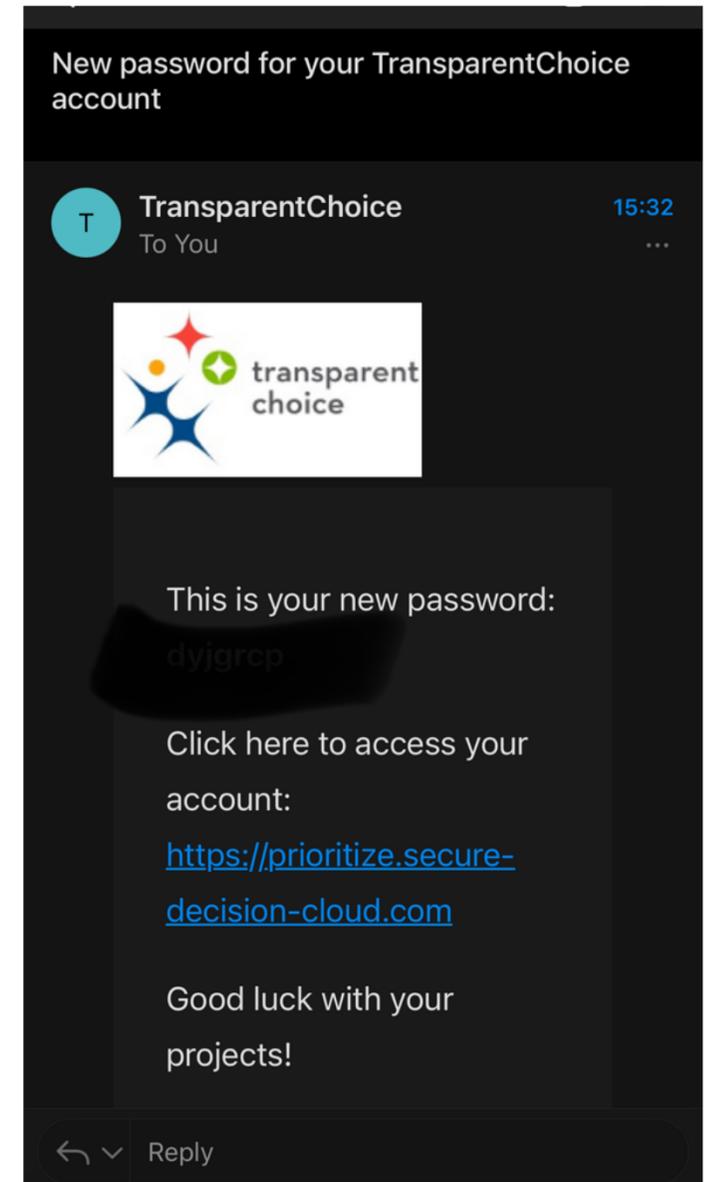
Workspaces

No workspaces assigned

Manage workspaces

Reset password

Send password on additional email





Go a step further with SSO - then all admin-approved Business Users don't need a password

1. Chose SSO from Admin Panel
2. Enter OAuth2 data (from your IT team)
3. Now use one link for all access for all users... including Business Users

(Enterprise clients only)

1

TransparentChoice organizational dashboard

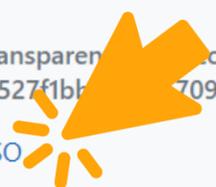
[+ Add user](#) [+ Add workspace](#)

Type to search for user, workspace or portfolio in your organization...

TransparentChoice

System admin: janusz@transparentchoice.com
Version: 2023.11.1-3713+e527f1b17099be0560c25eafb720eb694c

[Manage](#) [Branding](#) [SSO](#)



Configure SSO

2

Only OAuth2 based SSO is supported.



Users can follow this link to sign in with your SSO provider:
<https://prioritize.secure-decision-cloud.com/auth/signin?id=tch>



3

OAuth2 client ID:

ed465999-e7e7-4c89-bb1d-63968f59c8a4

OAuth2 client secret:

.....

OAuth2 token endpoint uri:

https://login.microsoftonline.com/91c68005-cbb6-4978-b9d6-709c4

OAuth2 authorization endpoint uri:

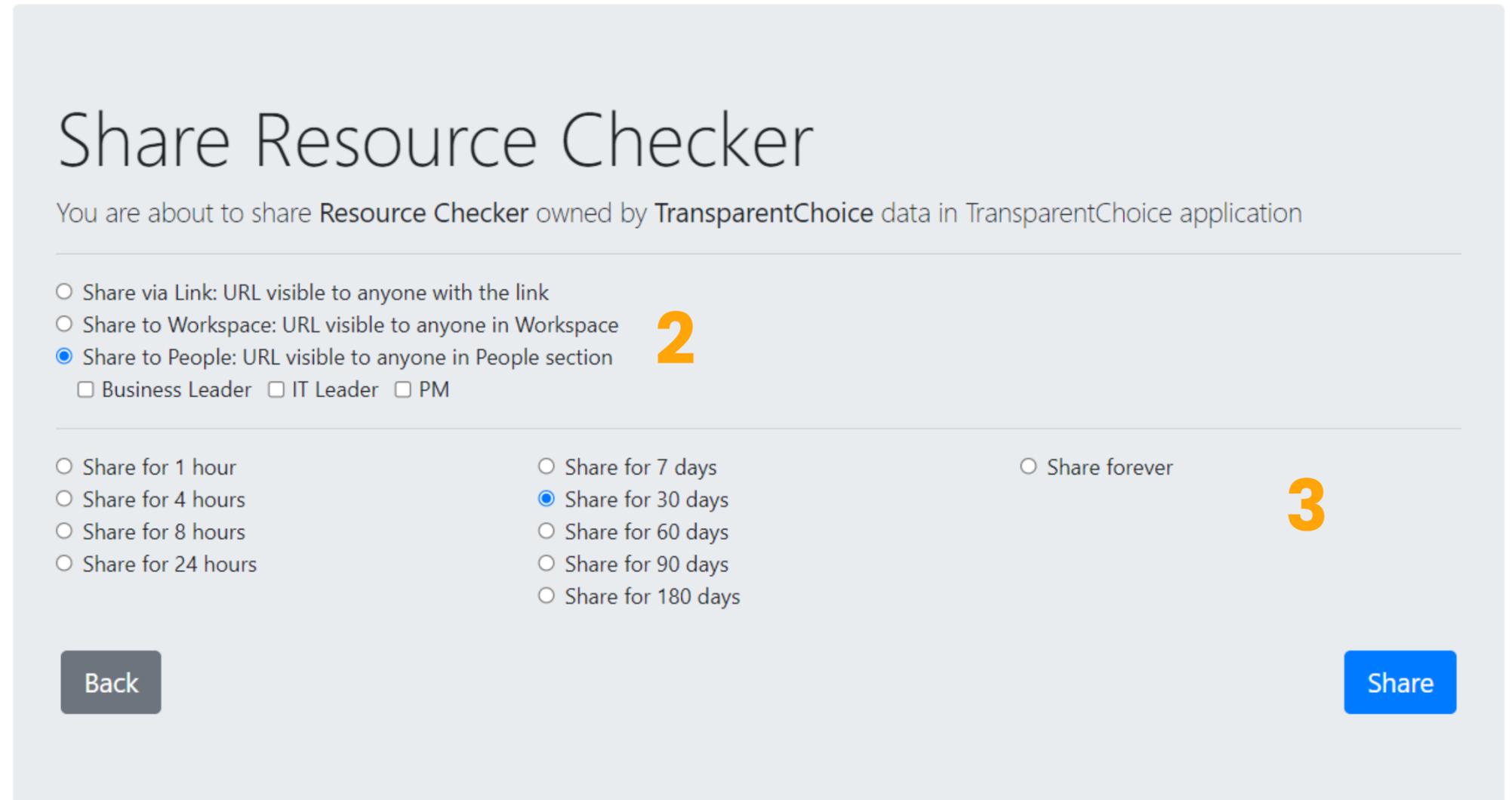
https://login.microsoftonline.com/91c68005-cbb6-4978-b9d6-709c4

Save



Make shareable URLs: How to time-bomb reports

1. Share Report / Request Page
2. Share can be to open (like old version), locked to all users, or limited to all /some People
3. Stop stale data from living forever - time-bomb Reports or New Project Request Pages





Further Security Features

Account-free sharing

If you share a link that is locked to People section and share it, then non-Business Users will need to verify their email to access

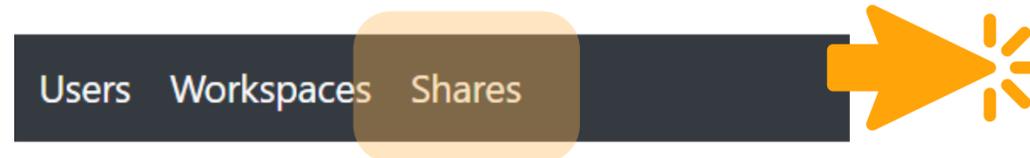
Shared to People at 2024-01-08 for 30 days

<https://prioritize.secure-decision-cloud.com/sharing/access/845dd3d4-d18b-472b-864e-527c98b8415d>



Track Shares

Use the Admin Panel to see & manage all active shares

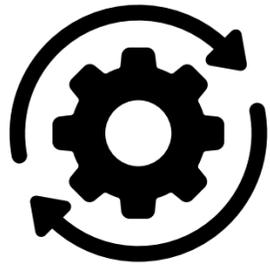


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[+ Add user](#) [+ Add workspace](#)

Active shares

#	Workspace	Portfolio	Data	Shared by	Shared with
1	Dan's Workspace	IT and Commercial shared backlog	New request page	Dan Dures	project lead_1 lead_20@tchc
2	Dan's Workspace	IT and Commercial shared backlog	Resource Checker	Dan Dures	business pers person_2@tcl
3	Stuart's workspace	Automotive Feature Prioritization LIVE DEMO	New report	Stuart Easton	alan_frost@tc academical@

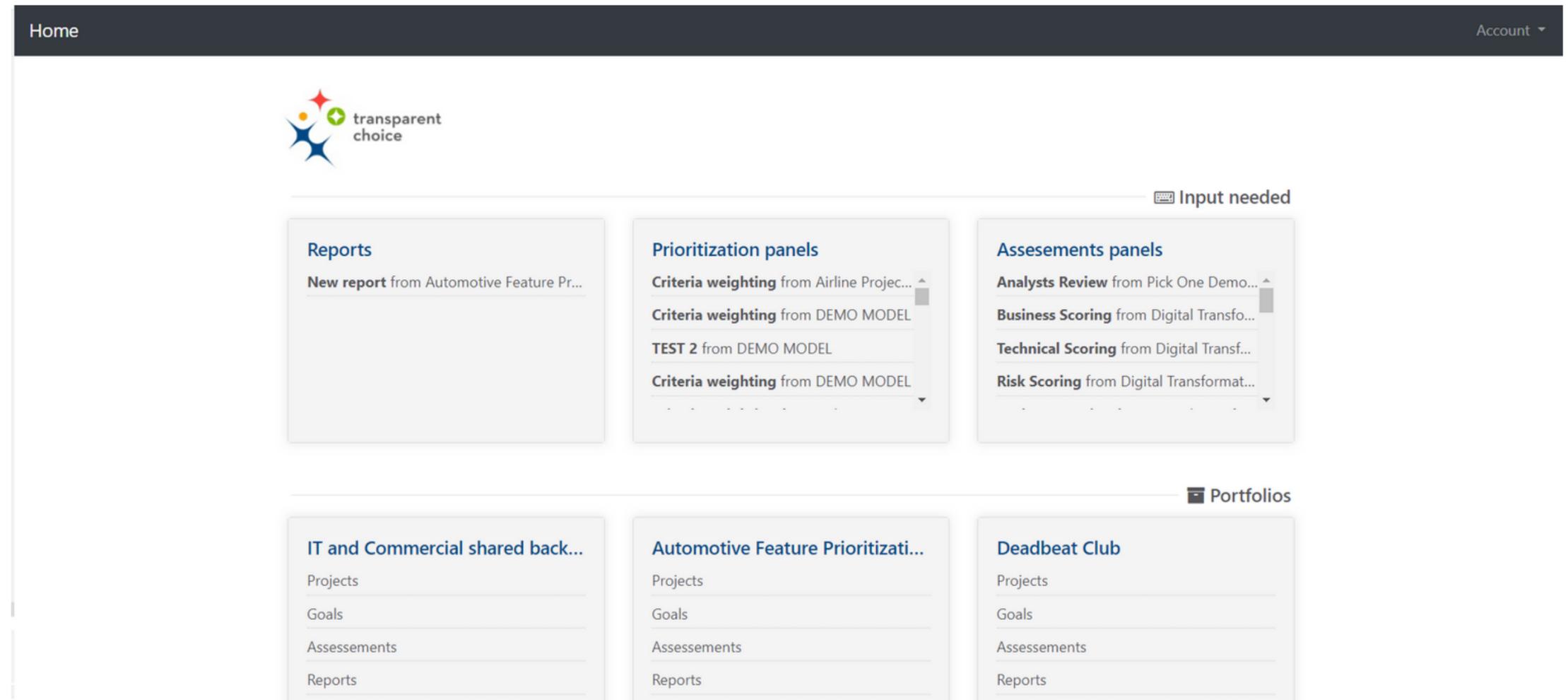
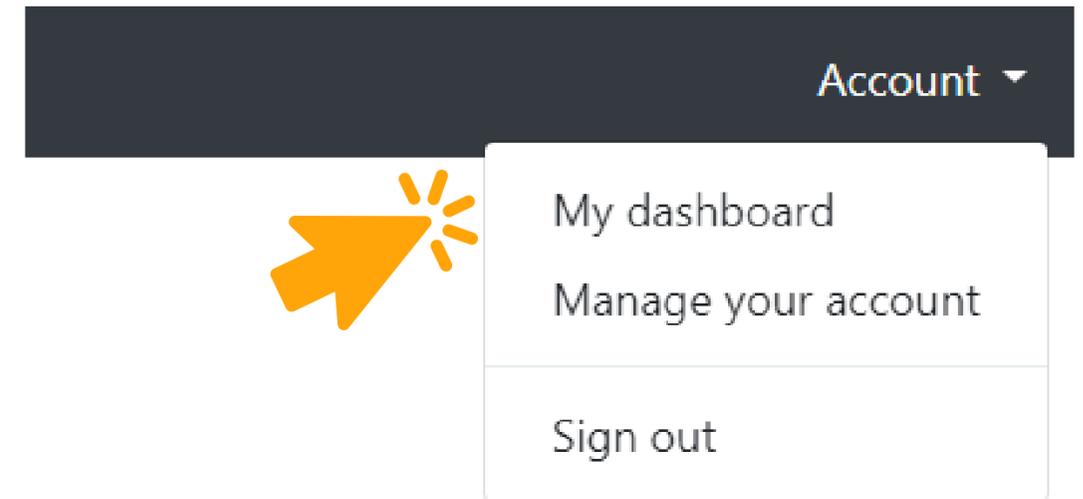


My Dashboard is available for workspace users too!

For Business Users simply use the main link for your instance – it goes directly to My Dashboard

For you (and other workspace users) find your links via corner navigation

Workspace users can also see handy workspace shortcuts





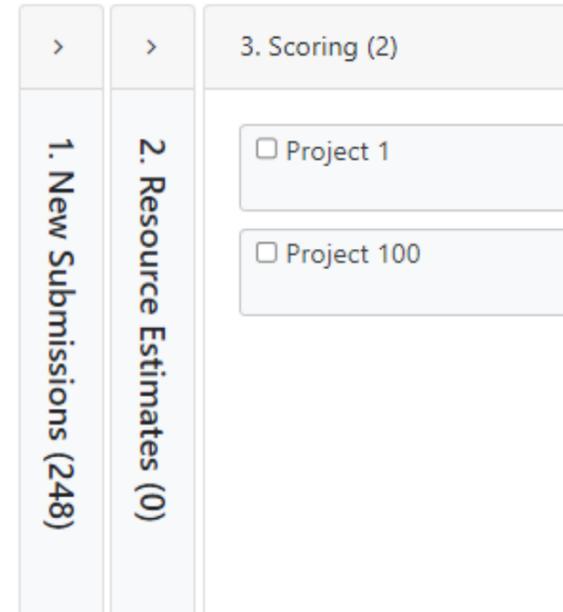
My Dashboard: Automate Assessments Panels

1. Customize Kanban with Scoring step
2. Create Active List based on Kanban status (+ any other attributes)
3. Select that List in Assessments, along with Attributes to score & Panelists to do the scoring
4. If they have Business User access their link is now live in My Dashboard

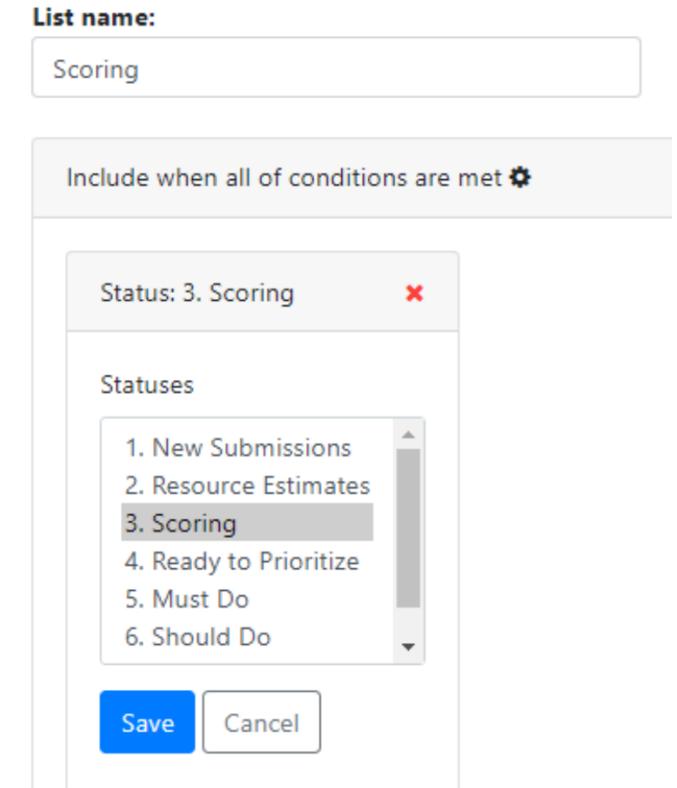
By updating Status in the Kanban Scoring Surveys in My Dashboard will now automatically update



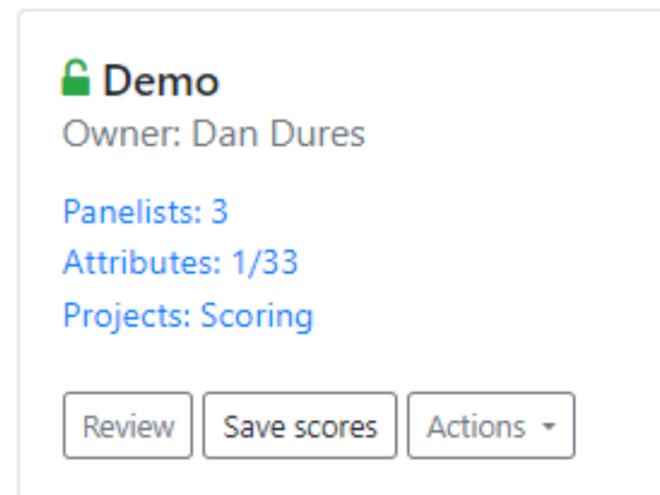
1



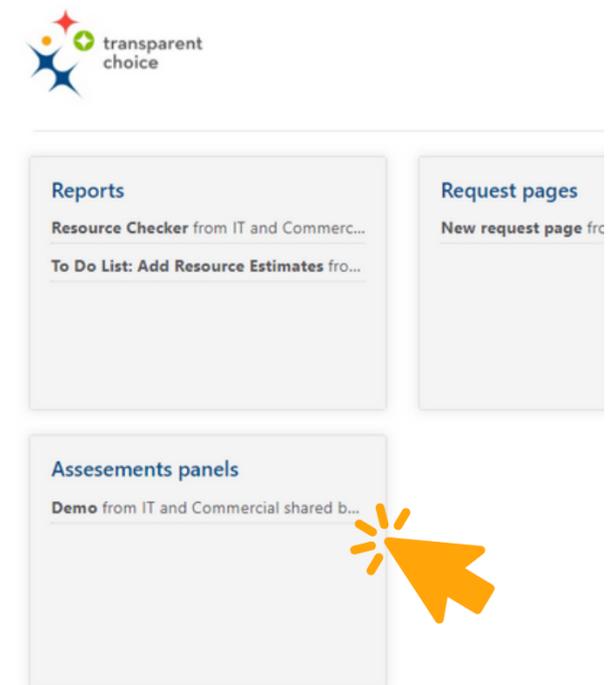
2

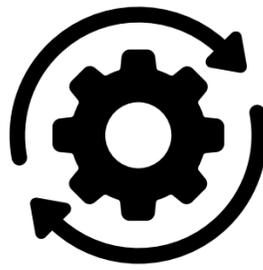


3



4





Quick Reminder: How to create a To Do List in Reports

	Name	Status	IT Resource: Network Engineers	IT Resource: App Devs	IT Resource: BA
▼ Status: 1. New Submissions					
Edit	Project 1	1. New Submissions		7	
Edit	Project 2	1. New Submissions			5
Edit	Project 15	1. New Submissions	15	6	
Edit	Project 19	1. New Submissions	5		9
Edit	Project 38	1. New Submissions	12	6	22
Edit	Project 39	1. New Submissions	14		
Edit	Project 40	1. New Submissions			7
Edit	Project 47	1. New Submissions	11	7	
Edit	Project 56	1. New Submissions		36	22
Edit	Project 73	1. New Submissions		13	11
Edit	Project 85	1. New Submissions	18	12	18
Edit	Project 90	1. New Submissions	10	14	14
Edit	Project 94	1. New Submissions	24	8	24
Edit	Project 103	1. New Submissions		24	38
Edit	Project 106	1. New Submissions	11	12	
Edit	Project 108	1. New Submissions	15		9
Edit	Project 110	1. New Submissions	15		6
Edit	Project 137	1. New Submissions		16	32

1. Add Project Managers into the People Section. Tag them as a group, and create Business User accounts.
2. Set up Email Type Attribute for Project Manager as a drop down using People section data.
3. Build Attributes for the data you want to collect. Remember you can use drop down options like a T-Shirt size if this works best
4. Add Attributes into a Form. Customize with a Blurb and Section Breaks.
5. Load Projects, ensuring each one is assigned to a PM.
6. Create new Report. Use Grid View to pick Attributes, especially the Project Manager responsible. Attach Form. Share to PM Group in People section.
7. All PMs will now have access via My Dashboard to filter for their projects and edit the embedded form.
8. Changes to the data will be live in the database, and recorded in the Decision Log



Once this setup is in place all new projects assigned to a PM will appear in their To Do List with no admin for Workspace User





Connect the dots: People, Governance, Leadership

“It’s really easy to contribute to the planning process with all my links in one place”



Business Users

Requester Team

Request Project via My Dashboard

Go to My Dashboard to score project

Go to My Dashboard to track team projects

See when your projects are due to be done

Delivery Team

Go to My Dashboard to estimate effort

Go to My Dashboard to score project

Go to My Dashboard to see scored backlog

See achievable due date for projects

Leadership Team

Go to My Dashboard to see data & set status

Sign-off on roadmap

Workspace Users

Review & progress in Kanban

Review & progress in Kanban

Run Assessment Reviews & Save Results

Set Resource constraints / Optimize 'Plan A' / run prioritization session

Run agreed projects via Roadmap Tool

“Once initial set-up is done the software mostly runs itself so I can focus on the people side of things”

*Coming in Q2

Book a call for a free consultation on how to optimize data collection





New Project 1 Pager + Business User data entry means step change in Accountability

1. Select a Project via the Kanban (click the name)
2. Click View Logs to see when & who data changes were made



You can collect data via a Report shared on My Dashboards... then see who makes the updates to the data!

The screenshot shows a project management interface. At the top, a project card for 'Project 1' is highlighted with a large orange arrow and the number '1'. Below the card, a log entry shows an update made '6 minutes ago' by 'dan' on 'Jan 8th, 2024 at 04:33 pm'. The log entry includes a table with the following data:

	Previous value	Current value
IT Resource: PM	0	2
IT Resource: Network Engineers	2	3
IT Resource: Security	9	8
IT Resource: PA	0	2

Below the table, a 'Last activity' section shows the same update: 'Updated 6 minutes ago by dan'. At the bottom of this section are two buttons: 'View logs' and 'Log a note'. A second large orange arrow and the number '2' point to the 'View logs' button.



New Look 1 pager is also designed to make it easier to track, collaborate and manage project data

The easy-to-change structure in Attributes now formats how project data is presented

Project 1

Search...

Status

1. New Submissions

Created

April 19, 2023

Criteria

Achieve Market Leadership by 2026

41.67

Availability of technical skills required

25

Business adoption risk

58.33

Commitment level for Senior Sponsorship

41.67

See all Email Attributes linked to the project - and send them updates and forms with 1 click

Contacts

-  **Project Lead**
Project Lead_3@TCHDummy.com
-  **IT Scoring**
IT Manager_2@TCHDummy.com
-  **IT Scoring**
IT Manager_8@TCHDummy.com

Link Files & Set Project Dependencies

Files

Upload file

Dependencies

This project is a foundation for 0 projects and is dependent on 0 projects.

Manage



Accountability: look out for the business case builder in our next release (later in Q1)

Define the detailed benefits linked to a project – then link time-series benefits to your AHP model for prioritization

Create a consolidated financial plan based on your chosen portfolio, including risk adjustment – all fully configurable for your org structure & use case

Build multiple portfolios in parallel, allocating shared resources between them based on best value

Reach out for a preview if you see opportunity to link prioritization and strategic planning closer together

Revenues		Margins		
Revenues (USD, Thousands)	Y1	Y2	Y3	
Market 1	1,000	1,050	1,102	
Market 2	500	525	551.25	
Total	1,500	1,575	1,654	
% Growth		5.0 %	5.0 %	

	2023	2024
▼ Revenues	\$5,000	\$10,000
▼ COGS	\$750	\$1,500
Gross margin % of sales	\$4,250 85.00%	\$8,500 85.00%
▼ Opex % of sales	\$102,000 2040.00%	\$22,500 225.00%
EBITA % of sales	-\$97,750 -1955.00%	-\$14,000 -140.00%

