

Unified Intake Idea Process in CA PPM - Clarity

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- The Unified Intake team has been using JIRA for their Intake processes.
- The merger with TWC & BHN has caused a rapid expansion in adoption and demand for projects. This has caused the existing processes through JIRA and Chalk to become more complex to support.
- JIRA does not readily support the tracking and management of project portfolios. To achieve the desired functionality of Executive leadership, multiple add-ons and costly custom development and integration projects are required.
- The Unified Intake team has recently begun using CA PPM – Clarity to process their new Idea submissions and to manage existing ideas. CA PPM enables end-to-end management of multiple project portfolios out-of-the-box.
- The CA PPM - Clarity Idea page allows the Unified Intake team to update statuses and other pertinent information on one form which can send notifications and information to assigned user roles via email.
- This slide deck introduces
 - Security and Permissions
 - Reviews the two options to submit Ideas to Unified Intake
 - Creating a new Idea via both available options
 - Editing an existing Idea
 - Intake Request Status Dashboard

Security and Permissions

- In order to access the CA PPM – Clarity system, the user must have an active CA PPM – Clarity account.
- The ability to view and edit Pages and Portlets such as Ideas and Dashboards in CA PPM – Clarity are determined by User roles and the Permissions of these Roles.
- These roles and corresponding permissions provide the needed security to keep unauthorized users from accessing pages and portlets if they are not a member of the appropriate role or permission group.
- These roles and permissions are administered by the CA PPM – Clarity support team.
- Permissions are set at the page level, not field level.
- Examples of roles and permissions for Unified Intake are shown below:
- IT Intake has similar roles and permissions for their pages and portlets.

Group ▲	ID	Description	Status
Denver Intake - Idea - Administrators	 den_idea_all_access	This Group gives IDEA Create, Edit, Approve and Convert access. DO NOT add users to this group without permission from ASHLEY RICE. This is for Denver Unified Intake Administrators ONLY	Active
Denver Intake - Idea - Intake Lead	 den_unified_intake_idea	This group gives IDEA Create, Edit, approve and Convert access for Denver Unified Intake Leads. Must be added to Partition Group as well	Active
Denver Intake - Idea - View Only	 den_idea_view_only	This Group will give View only access to all Ideas for : CORE Team Members, SUB-Team members, and Non-UI Stakeholders Must be added to Partition Group as well	Active
Denver Intake - Partition Access	 denver_intake	Allows access to the Denver partition - Must be added to ALL users needing access to Denver Unified Intake Ideas.	Active

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There are two options to access the Unified Intake Idea submission process.

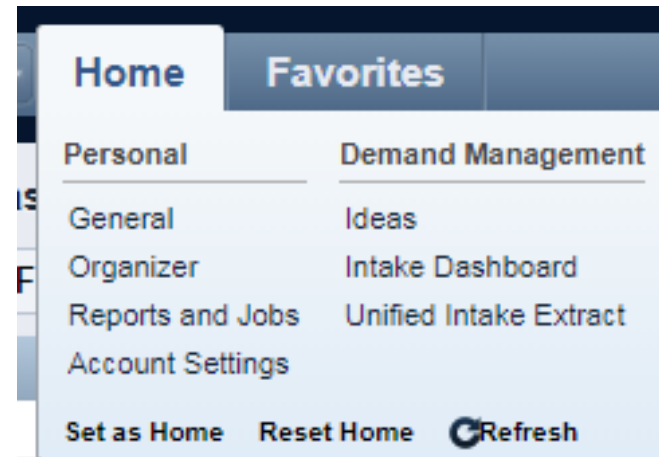
1. Access via the Web Idea Form

- Once on the CA Clarity PPM Request Tool link, Click the **Clarity Forms** dropdown and select **Idea Web Form**.



2. Access via CA PPM - Clarity

- Users can access the Ideas page as follows:
 - Hover over **Home** and select **Ideas**.



Creating a New Idea via Idea Web Form

- Users can submit ideas via the web based form if they do not want to log into Clarity.
- Users enter required information into the form and click the Save button to submit the form to the Unified Intake Team via Clarity. (partial form below)
- This web form uses the XOG process to enter the information into the Clarity form.

Charter COMMUNICATIONS PPM Request Form

Clarity Forms - Production

Projects submitted after 12:00 pm MT on Wednesday will be on the agenda for the following Unified Intake Review meeting. Contact UnifiedIntake@charter.com for any questions or concerns regarding this form.

General Project Information

*Idea Name:

*Requester:
Start typing to get a list of possible matches.

*Sponsoring Organization:
Please select the organization who is sponsoring / funding this project.

*Intake Presenter:
Start typing to get a list of possible matches.

*Program Name:
If this project is part of an existing program, please type the name of the program here. If your program is not found in this list, please select "Program Not Found". If this is a project that is NOT part of a program, please select "Stand Alone Project".

Accessing Ideas via CA PPM - Clarity

- The Unified Intake process uses CA PPM's Demand Management module to manage Unified Intake Idea requests.
- Each new Idea request is given an Idea ID, which is a unique identifier for the project request.
- All active ideas that have been created in the Charter Unified Intake Partition will display in the Idea list. (sample list on right)
- Click on any Idea's Subject Name to open the idea.
- Click on the "New" button at the bottom to create a New Idea.

	Subject	ID
<input type="checkbox"/>		Idea20171218000103
<input type="checkbox"/>	#01 test idea 17	Idea2018011700834
<input type="checkbox"/>	#02 test idea	Idea2018011700840
<input type="checkbox"/>	#1 test for idea status	Idea2018010500769
<input type="checkbox"/>	#1 test idea on Jan 10	Idea2018011000804
<input type="checkbox"/>	#10 test on jan 10	Idea2018011000800
<input type="checkbox"/>	#10 test on jan 10 v1	Idea2018011000801
<input type="checkbox"/>	#10 test on jan V2	Idea2018011000802
<input type="checkbox"/>	01 test idea 17	Idea2018011700838
<input type="checkbox"/>	1 Gbps Tier in Hawaii	Idea2018010500264
<input type="checkbox"/>	100% IP Video Experience (Stream 2.0)	Idea2018010500186
<input type="checkbox"/>	12345 Testing Intake Status Fix	Idea2018020200945
<input type="checkbox"/>	2/1 Ash Test	Idea2018020200948
<input type="checkbox"/>	2/7 Ash Test	Idea201827000304
<input type="checkbox"/>	2017 Enterprise Active Directory Services Integration	Idea2018010500187
<input type="checkbox"/>	4K Video On Demand to IP Device Enhancement	Idea2018010500379
<input type="checkbox"/>	Access to ICOMS Webservices	Idea2018010500312
<input type="checkbox"/>	AccessIT Universal Application Server Migration	Idea2018010500078
<input type="checkbox"/>	Account Look-Up Ookla Speed Test Results	Idea2017100900181
<input type="checkbox"/>	Add Active, Former, Never Flag to the Enertex Extract File	Idea2017082300125

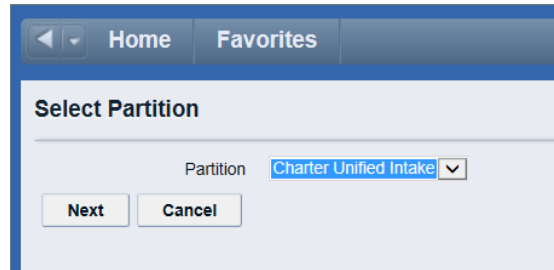
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Save New Reject Approve Mark for Deletion Cancel Deletion

Currency = USD

Creating a New Idea via CA PPM - Clarity

- Clicking the New button on the bottom of the Idea page opens up the Partition selection page. For Unified Intake Ideas the user would chose the Charter Unified Intake partition from the list of Partition choices and then click “Next.”



A screenshot of a web application dialog box titled "Select Partition". The dialog has a blue header with "Home" and "Favorites" buttons. Below the header, the title "Select Partition" is displayed. A label "Partition" is followed by a dropdown menu showing "Charter Unified Intake". At the bottom of the dialog are two buttons: "Next" and "Cancel".

- After clicking Next, the “Create Idea” page displays and is ready for data entry. Partial page screenshot below:



A screenshot of the "Create Idea" page in a web application. The page has a blue header with "Home" and "Favorites" buttons. Below the header, the title "Create Idea" is displayed. The main content area is titled "General Project Information" and contains several form fields:

- Idea Name**: A text input field.
- Requester**: A dropdown menu with a search icon and a hint "(Start typing to get a list of possible matches.)".
- Intake Presenter**: A dropdown menu with a search icon.
- Sponsoring Organization**: A dropdown menu with a search icon and a hint "(Please select the organization who is sponsoring / funding this project.)".
- Program Name**: A dropdown menu with a search icon.

Edit an Existing Idea

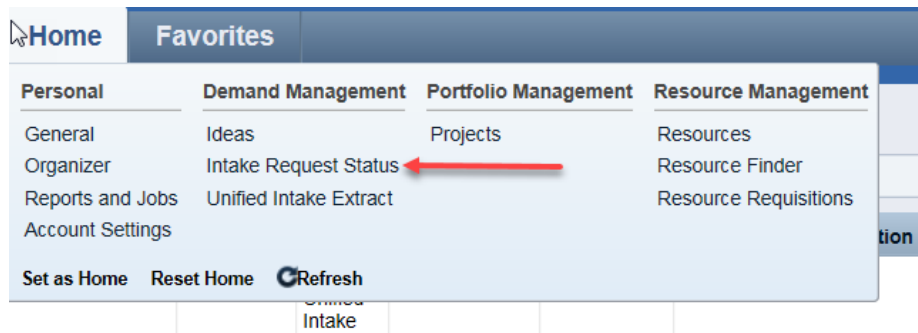
- The Edit view opens for the Idea you selected from the Idea list. All information submitted by the requester is displayed in the Edit view. There are multiple fields and sections that can be edited if you scroll down the page. (partial form below)
- Users who only have View Only access will not be able to edit any of the fields on the Idea page.

The screenshot shows a web application interface for editing an idea. The top navigation bar includes 'Home' and 'Favorites'. Below it, a menu bar contains 'Properties', 'Team', 'Financial Plans', 'Hierarchy', 'Processes', 'Audit', and 'Approve Idea'. The main content area is titled 'Idea: 2/7 Ash Test - Properties - Main - Unified Intake Summary'. The form is organized into two columns of fields:

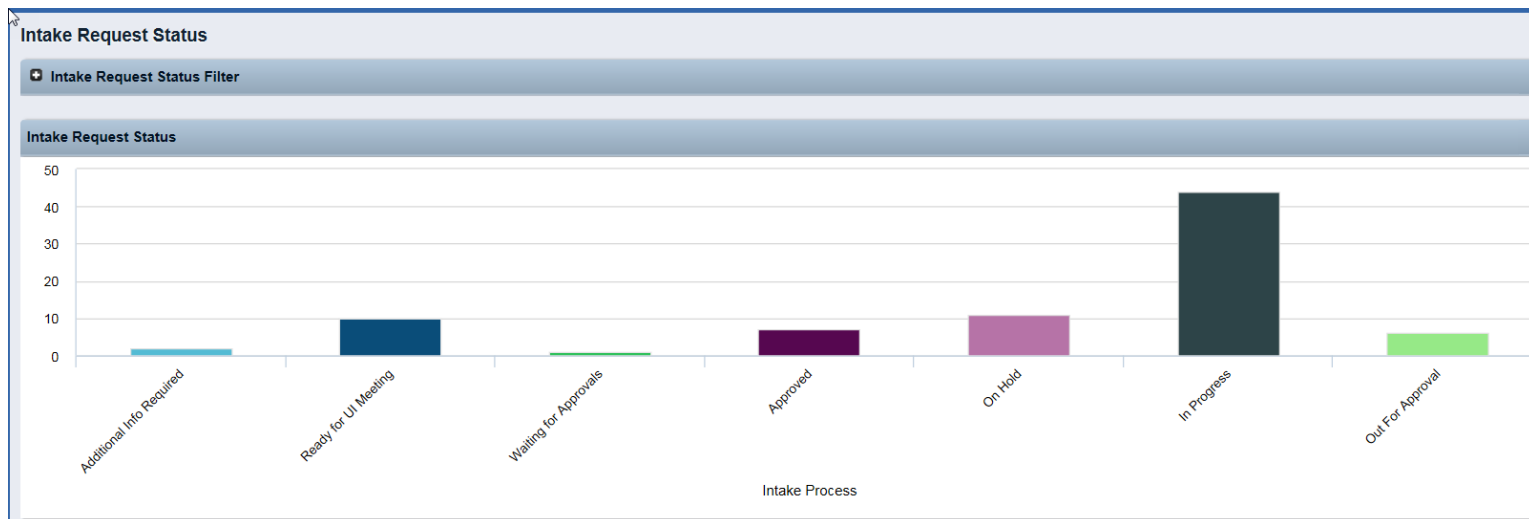
- Left Column:**
 - Idea Name:** 2/7 Ash Test
 - Requester:** Rice, Ashley (with a search icon and a note: '(Start typing to get a list of possible matches.)')
 - Intake Presenter:** Rice, Ashley (with a search icon and a note: '(Start typing to get a list of possible matches. Enter in the name of the person to review the project on the Unified Intake call.)')
 - Program Name:** Program Name Not Found (with a search icon and a note: '(If this project is part of an existing program, please type the name of the program here. If your program is not found in this list, please select "Program Not Found". If this is a project that is NOT part of a program, please select "Stand Alone Project".)')
 - M&A Integration Activities?:** (Please identify if this project is being undertaken to advance the integration of BHN, TWC, and Charter.)
 - Description:** 2/7 Ash Test (with a large text area and a note: '(Please provide as much detail as possible about what this requested project is about as well as how the project came about by including the background of the current state, any existing systems that are used, as well as what the major goals of the project are.)')
 - Requested Project Start Date:** 3/2/2018 (with a calendar icon and a note: '(The project start date (kick-off date) that is being requested by the sponsoring organization. Please avoid dates that occur in the past unless the project started in the past without going through Unified Intake first.)')
 - Requested Project Delivery Date:** 8/31/2018 (with a calendar icon and a note: '(This is a requested date only. Committed dates will be provided during project planning after detailed requirements and design are completed and approved. Please ask your project manager for the actual delivery date after this project has completed Unified Intake.)')
 - Requested Date Justification:** This is a test.
- Right Column:**
 - Idea ID:** Idea201827000304
 - Unified Intake Status (maps to Idea Status):** New
 - Sponsoring Organization:** Technology Services (with a search icon and a note: '(Please select the organization who is sponsoring / funding this project.)')
 - Project Type:** Migration
 - Business Value Justification:** Stability & Performance (with a dropdown arrow and a note: '(Please select as many options as apply.)')
 - Business Case:** This is a test. (with a text area and a note: '(What is the reason that this project is being initiated? What value will the business gain by executing this project?)')

Dashboard

- To access the **Intake Request Status** dashboard, navigate to the **Home** tab. Below the **Demand Management** section, there is a link to the **Intake Request Status** dashboard.



- Clicking the link brings up the **Intake Request Status** dashboard.



Dashboard (continued)

If a user clicks into a bar on the **Intake Request Status** dashboard, then a list of Ideas will display based on the status bar selected / clicked on. In this case the bar labeled “On Hold” was clicked on which displays all (Active) Charter Unified Intake ideas that have the Intake Status of “On hold.”

Intake Request Drill Down

Intake Request Drill Down

ID▲	Name	Sponsoring Organization	Intake Lead	Impacted Organizations	Start Date	Delivery Date	Intake Status	Created Date	Budgeted Project
Idea2017100900185	Virtual Agent Vendors Comparison / Messaging Platform		Briner, Andrew	Information Technology		6/30/18	On Hold	10/9/17	
Idea2017101200221	Call Detail Record Platform Modernization & Unification		McNeil, Candice	Information Technology		4/30/18	On Hold	10/12/17	
Idea2017112000355	Nextgen QUE Process Needed for Non-Pay Orders to Spread Disables Throughout Day		Benefield, Nicholas	Information Technology		6/29/18	On Hold	11/20/17	
Idea2017112000361	STVA Holistic Customer Quality of Experience (Bulletproof)			Information Technology		12/31/18	On Hold	11/20/17	
Idea2017120400384	Business Buyflow Automation		Jones, Christopher	Information Technology		7/1/18	On Hold	12/4/17	
Idea2017120800392	STARS Decommission - Archive Space Request		Jones, Christopher	Information Technology		3/30/18	On Hold	12/8/17	
Idea2017121500398	Create Central Processing Unit Monitoring for Casa			Information Technology		3/30/18	On Hold	12/15/17	
Idea2018011600438	Enhance HSD, VOIP, VIDEO Provisioning Repair in Service Activation Tool		Benefield, Nicholas	Information Technology		2/28/18	On Hold	1/16/18	
Idea2018011600443	802.11ax Router - Spectrum Engineering Prototype			Information Technology		4/30/18	On Hold	1/16/18	
Idea2018020200525	New Database for Tech Net and Tech Mobile Signature Capture		Jones, Christopher	Information Technology		4/15/18	On Hold	2/2/18	
Idea2018311000101	Customer Facing Construction Self Help Web Site	Field Operations	Bovilsky, Michael	Accessibility; Software Engineering; Information Technology; Field Operations; Communications	2/28/18	5/31/18	On Hold	3/11/18	2018 Unplanned-Budget TBD

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Q and A

Contact Info: Michael.Stevich@charter.com