Complete Discovery on Moving Existing DESM Requests to TDX

The scope of this work is to determine the feasibility of transferring the Strategy Management intake form to TeamDynamix (TDX). After a thorough review of TDX (from the user and form management perspective), TDX has been assessed as a viable option.

Please read through the full details of the discovery and resulting recommendations.

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Minimum Requirements

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The intake must incorporate the following requirements. Select the carrot menu to reveal the collapsed subcategories/notes within each category.

Submitter Information

- *Submitter name*
- *Submitted contact information*
- *On behalf of (another employee)*
- *Desired publication date*

Types of Deliverables

- *News items*
  - IT Weekly Newsletter/OHIO IT Updates meeting
  - HR Updates (IT Weekly)
  - OEN (Ohio Employee News)
  - OHIO Today (OHIO News)
  - CTLA newsletter article (Center for Teaching and Learning)
  - Business Matters newsletter article (Finance)

- *IT Weekly subscriptions*
  - *Note: This is an automated process facilitated by IDM/provisioning.*

- *Calendar*
  - CUE (Calendar of University Events)

- OHIO IT Calendar

- *Mass emails*
  - *Note: requires both content and a distribution file*

- *Website changes*
  - TDX (TeamDynamix)
  - WebCMS (ohio.edu/oit)

- *Social media posts*
  - Job Postings
  - Special Events
  - Current Technology Campaigns
  - *Note: Advisable to have imagery or at least a design brief to guide desired imagery.*

- *Multiple Channel Requests (simultaneous submissions)*
  - *Note: Requires a campaign/source document outlining all required copy with the respective channels.*

- *Digital Displays*
  - *Note: Requires imagery or at least a design brief to guide desired imagery.*

- *Information gathering*
  - Focus groups
  - Surveys
  - User testing

TDX Versus Microsoft Form (Table Comparison)

	MS Forms	TDX Forms
Branching Logic/Parent/Child	X	X
Can be Embedded as a SharePoint Module	X	X
Can be Shared as a Link	X	X
Decorative Imagery	X	
Dropdown Menu Selection		X
Easy to Create/Edit	X	
Form is trackable in TDX		X
Hidden Helper Text (?)		X
Hyperlinking in Form Text		X
Metrics Available	X	X
Provides Complex Form Design		X
Provides Simple Form Design	X	X

Proposed Changes to Static Form & Branching Logic

The following proposed changes are assuming that we will create a form in TDX. The following field configurations are available in TDX (but not necessarily Microsoft Forms).

The form will begin with three static questions to collect basic information.

Three Basic Static Questions

Field Name	Field Type	Information Entered
Contact Info	Autofills based on visitor data	• Submitter name, email, department account
On Behalf Of...	Not required/single line text box	• Person's name
Product/Portfolio	Dropdown menu (Select one)	• Product/Portfolio name • Multiple • Other • N/A

Note: Since the TDX form will automatically collect the submitter name, OHIO ID (email), and department account, this autofill data will be used as the contact information.

Changes to Branching Logic

The remainder of the form will utilize branching logic (parent/child dependencies) based on the user's needs. Visit the linked appendix for the full explanation of proposed logic mapping.

Two Intake Request Vectors

These are the current request vectors generated on the Strategy Management Intake channel. Each has its own set of requirements, function, and process. The first is initiated via user action. The second item is automated.

- SM Communications Request form
- IT Weekly opt-in/opt-out automation (Newsletter Distribution)

A Little More About Newsletter Distribution Management

The newsletter distribution process is partially* automated and is facilitated by both IDM and provisioning. IDM advised that we not change the current automation process since it crosses different group responsibilities and is technically already a TDX managed process.

The ticket output destination (whether Outlook group email or Teams channel post) can be modified to a new location (ex. It is deemed necessary to move the intake destination to Portfolio Management rather than the current Strategy Management location) however it is recommended that these manual requests continue to be coupled with the automated intake items to keep everything in a centralized location.

Note: The automation part of the process is only related to reporting opt-ins/opt-outs. The actual addition and subtraction of unique IT Weekly subscribers is managed manually within Emma.

Fresh Eyes Approach: Location, Location, Location!

It is possible to add a form into the TDX Services catalog (similar to the organizational structure created by DIO), however some thought will need to be given towards what a Digital Enablement (DE) category in TDX would look like.

- Some required questions: What would be the DE subcategories? Would this hierarchy reflect the actual Portfolio/Product structure? What should be included/excluded? This requires additional discovery.

In addition to having the intake form available in the Service Catalog, the form should also be linked via SharePoint webpart. This will improve users' ability to locate and utilize the form!

Note: The M365 Administrators confirmed that it is possible to embed a TDX form in SharePoint.

Here is a mockup of what that might look like on SharePoint.

User Notes/Improvements

Though the current Microsoft form has favorable feedback overall, there were a few small items that require thought. These changes should be considered regardless of whether we move forward with TDX or stay with the current form.

- The add "Applicable link(s)" wording in the current submenus should use the wording "source/campaign document" to reduce confusion.reduce confusion.
- Helper text needs to be strategically bolded/located to explain submission deadlines and other important information.
- A multiple channel option should be added (for multi-channel campaign documents).
- The form should be easier to locate (via SharePoint/TDX).

- The question "**Please identify any specific date requests"** should have a larger text field to allow more information to be added.

Work Estimate/Requirements & Recommendation

TDX as a form solution is a viable alternative to the current state setup of Strategy Management's Intake form. However, implementing the change will take some significant effort. Here are the options as I see them:

- **Option #1: We move the form to TDX.**
  - It will take at least a 2-week sprint to configure the branching logic in a TDX form. This is regardless of whether we duplicate the form exactly as it currently exists in Microsoft, or if we create the Proposed Changes to Branching Logic. TDX administrators and Support Experience Management will need to be involved with these configurations.
  - In addition, another 2-week sprint will then be required for configuring the form location (whether it is housed within TDX under a portfolio/product hierarchy (similar to Digital Infrastructure & Operations), on a SharePoint location, within a Team, or all of the above.
  - The automated IT Weekly subscription process may need to be calibrated depending on which output location is chosen (i.e., Outlook versus Teams). I highly recommend a Teams intake similar to our current method for team visibility and optimal organization.
  - Once these items are addressed then some additional time will be required for publicizing the changes (IT Weekly, Manager's Channel, etc.).
- **Option #2: It stays as a Microsoft form**
  - Feedback obtained from several consistent users indicated that the current state form is easy to use. Why fix it, if it's not broken?

Additional Considerations

- Regardless of whether the intake stays as a Microsoft or TDX form we should place the form in an easy to find location (such as posting a webpart in SharePoint in addition to a TDX location).
- A centralized intake output (current state) via a Teams channel is ideal. TDX administrators confirmed that TDX tickets can be communicated via a Teams channel output.