

Agile Product Lifecycle Management for Process

New Product Development User Guide

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September 2008

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September 2008

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ABOUT THIS MANUAL

Agile Product Lifecycle Management for Process Documentation

The Agile Product Lifecycle Management (PLM) for Process documentation set includes user guides, an administrator's guide, and release notes, all in Adobe® Acrobat™ PDF format. The Oracle Documentation Web site contains the latest versions of the Agile PLM for Process PDF files. You can view or download these manuals from the Web site, or you can ask your administrator if there is an Agile PLM for Process Documentation folder available on your network from which you can access the documentation (PDF) files. Visit the Oracle documentation Web site at:

<http://www.oracle.com/technology/documentation/index.html>

Note The minimum software requirement for reading the PDF files is Adobe Reader™ version 6.0. You can download this free program from www.adobe.com.

If you need additional assistance or information, please contact support@agile.com or phone (408) 284-3900 for assistance.

Before calling Agile Support about a problem with an Agile PLM for Process manual, please have ready the full part number, which is located on the cover.

Audience

This guide is intended for end users who are responsible for creating and managing information in Agile Product Lifecycle Management for Process. Information about administering the system resides in the *Agile Product Lifecycle Management for Process Administrator User Guide*.

Variability of Installations

Descriptions and illustrations of the Agile PLM for Process user interface included in this manual may not match your installation. The user interface of Agile PLM for Process applications and the features included can vary greatly depending on such variables as:

- ❑ Which applications your organization has purchased and installed
- ❑ Configuration settings that may turn features off or on
- ❑ Customization specific to your organization
- ❑ Security settings as they apply to the system and your user account

Where to Find Information

Consult the table below to find specific information from the relevant Agile PLM for Process information source.

Table 1: Agile PLM for Process documentation topics, by source

Information type	NPD User Guide	Admin. User Guide	Readme file	Agile training	Agile Help Desk	Agile sales rep
Administering Agile PLM for Process		●		●		
Cache management		●				
Core data management		●				
Custom data management		●				
Feature requests					●	●
Group management		●				
Innovative sales pipeline	●					
Installing Agile PLM for Process				●		●
Known issues			●			
Last-minute changes			●			
Metrics	●					
Projects	●					
Resolved issues			●			
Strategic briefs	●					
System-based roles		●				
System requirements			●			
Technical support					●	
Templates	●					
User management		●				
Using the NPD application	●			●		
Workflow management	●	●				

Readme

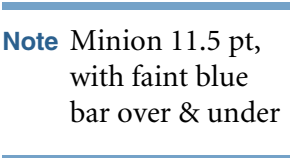
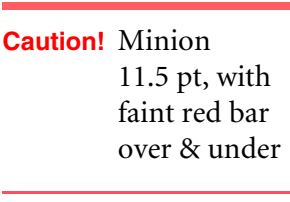
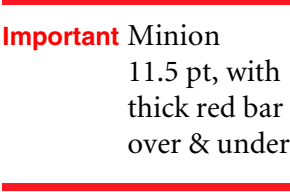
Any last-minute information about Agile PLM for Process can be found in the Readme file on the Oracle documentation Web site (<http://www.oracle.com/technology/documentation/index.html>).

Agile Training

Agile offers end user, administrator, developer, and implementation training courses. For more information, contact your Agile project manager or sales representative.

Document Conventions

The following formatting elements appear in Agile PLM for Process documentation.

Element	Meaning
Helvetica Condensed, 9 pt. bold type	A user interface (UI) element that a procedure is instructing you to click, select, or type into. For example, buttons or text entry fields.
9 pt. monospace font	Code samples
10 pt. monospace font	File names or directory names
<i>Blue italic font</i>	The linked portion of a cross-reference. Click it to go to the referenced heading, table, or figure.
Minion Typeface, Title Case	A named UI element that a procedure is describing but not instructing you to click, select, or type into.
 Note Minion 11.5 pt, with faint blue bar over & under	Alerts you to supplemental information.
 Caution! Minion 11.5 pt, with faint red bar over & under	Alerts you to possible data loss, breaches of security, or other more serious problems.
 Important Minion 11.5 pt, with thick red bar over & under	Alerts you to supplementary information that is essential to the completion of a task.

CHAPTER 1

Introduction

This chapter presents an overview of the New Product Development application. It includes the following topics:

- ❑ *New Product Development Application*
 - ❑ *Key New Product Development Components*
 - ❑ *Touch Points with Other Applications*
-

New Product Development Application

New Product Development (NPD) provides a multi-stage collaborative project and portfolio management solution in which you can streamline and accelerate the way new products are delivered to market. New Product Development allows you to improve the success of your company's innovation efforts by combining a global framework with the flexibility to manage portfolios, projects, and activities at the local level.

New Product Development is integrated into underlying processes and data, ensuring that users have direct access to all relevant data to evaluate and approve projects.

New Product Development can help to improve productivity and margins by allowing greater visibility to the innovation pipeline so that opportunities can be accelerated or terminated based on centralized and shared data.

Key New Product Development Components

Key NPD components include:

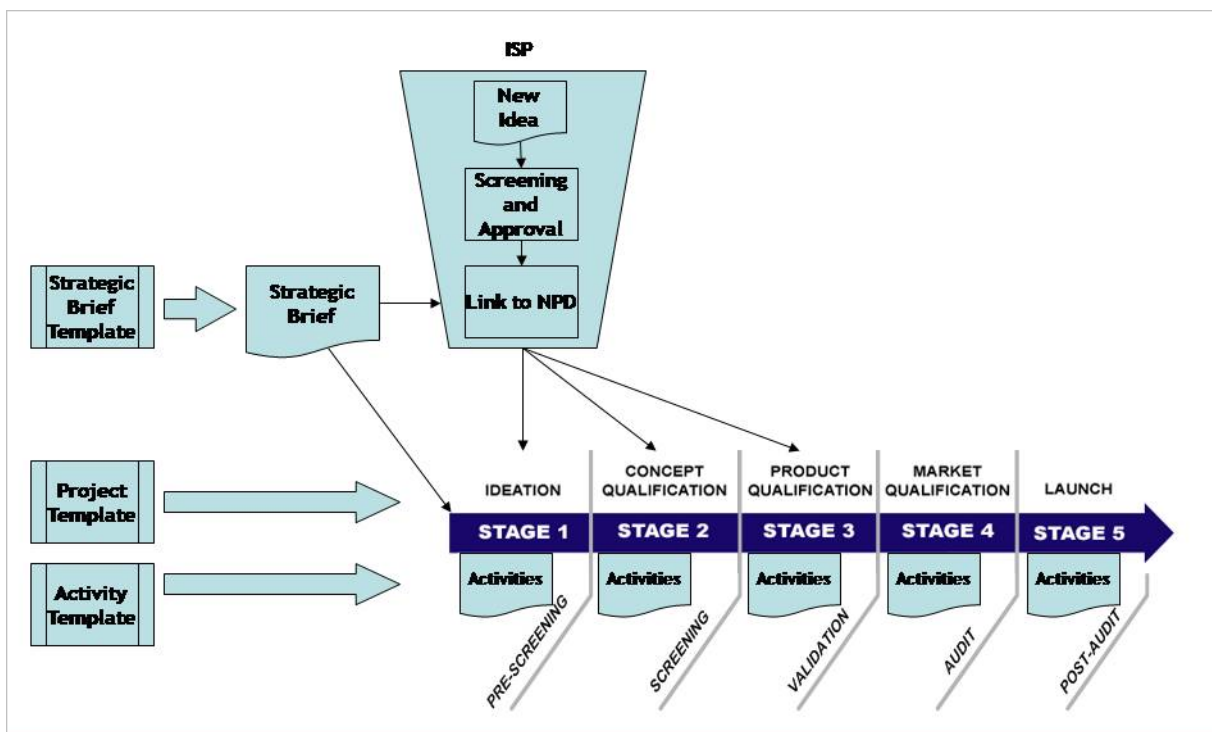
- ❑ **Stage/Gate Workflow**—The business process through which project-based initiatives are screened, prioritized, and actualized
- ❑ **Projects**—Primary tool used to track and manage projects
- ❑ **Activities**—Discreet workflow-enabled tasks and deliverables required at specific stages in a project's lifecycle
- ❑ **Strategic Briefs**—An actionable compartmentalization of a business unit's operating plan, serving as a foundation for new initiatives
- ❑ **Innovation/Sales Pipeline (ISP)**—Clearinghouse designed to capture and pre-screen incoming ideas and new opportunities

- ❑ **Templates**—Business rules which define team member formulation, routing, and information requirements for strategic briefs, projects, ISPs, and activities
- ❑ **Portfolio Management**—Customizable views which allow executives and program managers to see the progress of multiple projects and their associated metrics in condensed form
- ❑ **Metrics**—Measurements and indicators for projects covering a range of financial, schedule, and prioritization factors

Relationship of New Product Development Components

Figure 1-1 below shows a high-level view of how key components in NPD interact.

Figure 1-1: How NPD components interact to power the NPD platform



For general information on using Agile Product Lifecycle Management for Process software, see the *Agile Product Lifecycle Management for Process Getting Started Guide*.

Touch Points with Other Applications

The NPD application interfaces with the following Agile PLM for Process applications:

Document Reference Library

You can associate Document Reference Library (DRL) documents or catalogs of documents to the projects you create in NPD. Refer to [DRL Documents Section](#) on page 5-40 or for more information, see the *Agile Product Lifecycle Management for Process Document Reference Library User Guide*.

Global Specification Management

Use the activities feature in NPD to tie specifications created in Global Specification Management (GSM) to projects. Refer to [Related Documents \(from other ProdiKa applications\) Section](#) on page 5-40, or for more information, refer to the *Agile Product Lifecycle Management for Process Global Specification Management User Guide*.

Design Workbench

You can associate Design Workbench (DWB) specifications to NPD projects by using the activities feature. Refer to [Related Documents \(from other ProdiKa applications\) Section](#) on page 5-40, or for more information, see the *Agile Product Lifecycle Management for Process Design Workbench User Guide*.

Working with Strategic Briefs

This chapter describes strategic briefs. It includes the following topics:

- ❑ *Understanding Strategic Briefs*
 - ❑ *Strategic Brief Templates*
 - ❑ *Strategic Briefs*
-

Understanding Strategic Briefs

Use strategic briefs to communicate strategic direction and current objectives for a business unit. They help “dimensionalize” new opportunities by answering key questions. You can link all projects and ISPs to one or more strategic briefs.

Strategic Brief Lifecycle

Draft

This first stage of a strategic brief pulls in the Team Member Formulation Requirements (TMFR) from the template. Add additional data needed for the strategic brief in order for it to be reviewed in the next stage.

Review

The gatekeepers for a strategic brief receive electronic notification requesting their approval for the strategic brief. Once all approvals are complete, the owner can then transition the strategic brief workflow to a “Complete” status.

Complete

Once complete, a strategic brief can be used by innovative sales pipelines (ISP) ideas and projects. It cannot be modified and can only be moved to an inactive stage.

Inactive

Strategic briefs that are no longer applicable can be inactivated. Once inactive, these briefs can no longer be used within a new ISP or project.

Access Rights

Creating, updating, deleting, and workflowing a strategic brief template or a strategic brief will require you to have a certain role. Please refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for more detail.

Strategic Brief Templates

Strategic brief templates are used to define the Team Member Formulation Requirements (TMFR) for strategic briefs based on a given business unit. Use TMFRs to define team members and gatekeepers per functional area. You can also define users to be notified and guidance for functional areas.

Access strategic brief templates by selecting **Templates > Strategic Brief TMFRs** from the left navigation panel. Agile PLM for Process displays the Strategic Brief TMFRs search page, as figure 2-1 shows below. Open the desired strategic brief TMFR by using the Search tab or Taxonomy tab. For more information on using the search feature, refer to the *Agile Product Lifecycle Management for Process Getting Started Guide*.

Figure 2-1: Strategic Brief TMFRs search page

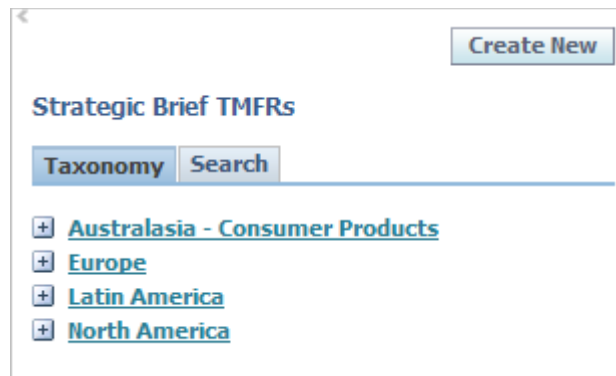


Figure 2-2 below shows the Strategic Brief TMFR template page. This page consists of the following sections:

- Summary Information
- Team Member Formulation Requirements
- Event History

Figure 2-2: Strategic Brief TMFR template page

Strategic Brief TMFR

Summary Information

Business Unit(s): North America » Consumer Products
 » [clear Business Unit values](#)

Template Admin(s): David Carter

Team Member Formulation Requirements

Functional Area	Team Member(s)	Gate Keeper(s)	Additional Notification	Guidance
Executive		Required		

[Add/Update Team Members](#)

Amber In Day(s) \ Red In Day(s)
☐ Automatically Approve after Red

Event History

Event	User	Date	Comments
Created	David Carter	11/29/2007 10:00:46 AM	

[show document admin »](#)

Summary Information Section

Key fields include:

- **Business Unit(s)**—This field is used to determine which template should be used when creating a strategic brief. The business unit on the strategic brief will be matched with this field. Only one strategic brief template can be assigned to each business unit.
- **Template Admin(s)**—The users defined in this field will have the ability to edit and save changes to the template.

Team Member Formulation Requirements Section

Strategic briefs copy the TMFR section from the template it resolves to. Below are definitions of what these fields are used for in the strategic brief.

- **Functional Area**—The functional area that the rest of the data within its row refers to.
- **Team Member(s)**—The strategic brief appears in these members' Action Items.
- **Gate Keeper(s)**—These members will be required to sign off on the Review workflow step before it is allowed to proceed to the next step in the workflow.

- **Additional Notification**—These members will be notified via email as the strategic brief enters a new stage in the workflow.
- **Required**—This checkbox appears when editing or adding a TMFR and is available for team members, gatekeepers, and additional notifications. It indicates that there must be one member defined in the corresponding column when used in the strategic brief. It is selected by default.
- **Guidance**—This is a text field where you can provide guidance to a team leader regarding the role that should be assigned for this part of the TMFR.

Status Indicator

The following attributes control the Green/Amber/Red status indicator on the NPD Signature Requests section of the Action Items page:

- **Amber In**—The Status indicator will turn Amber in this many days after the start date.
- **Red In**—The Status indicator will turn Red in this many days after the start date.
- **Automatically Approve after Red**—When checked, this will cause any signature requests to automatically approve when they turn red.

Event History Section

The Event History section displays a change history for the template. The entries are read-only and cannot be changed.

Working with Strategic Brief Templates

Creating a Strategic Brief Template

To create a strategic brief template:

- 1 Click the **Templates > Strategic Brief TMFR** link in the left navigation panel.
- 2 Click **Create New**. A new strategic brief opens.
- 3 Click **Business Unit(s)**. The Business Unit dialog box is displayed.
- 4 Select business units from the dialog box.
- 5 Click **Done** to save selections and return to the main Strategic Brief TMFR screen.
- 6 Click **Add/Update Team Members** in the Team Member Formulation Requirements section.
- 7 Click **Add New**. The button is displayed in figure 2-3 below:


Figure 2-3: Add New button



Team Member Formulation Requirements						
	Functional Area	Team Member(s)	Gate Keeper(s)	Additional Notification	Guidance	

Add New

- 8 Select a functional area from the drop-down list.

Figure 2-4: Select a functional area

Team Member Formulation Requirements					
	Functional Area	Team Member(s)	Gate Keeper(s)	Additional Notification	Guidance
	<div>Capital Engineering</div> <div> <div>Capital Engineering</div> <div>Channel Marketing/Sales</div> <div>Chemistry</div> <div>Consumer Services</div> <div>Engineering</div> <div>European Regulatory Affairs</div> <div>Legal Department</div> </div>	<div>+</div> <div></div> <div><input type="checkbox"/> Required</div>	<div>+</div> <div></div> <div><input type="checkbox"/> Required</div>	<div>+</div> <div></div> <div><input type="checkbox"/> Required</div>	<div></div> <div></div> <div></div>

- 9 Click the add data icon () under the Team Member(s), Gate Keeper(s) and Additional Notification columns to bring up the user search page.
- 10 Search for and select user names, then click **Done**.
- 11 If applicable, check the **Required** check box to indicate that one member must be defined in the corresponding column in strategic briefs using this template.
- 12 Click the apply changes icon () to confirm your selections.
- 13 Repeat steps 7 through step 11 as needed for other functional areas.
- 14 Click **Done** to save selections and return to the main Strategic Brief TMFR screen.
- 15 Click **Save** or **Save & Close** to save the strategic brief TMFR.

Deleting a Strategic Brief Template

Users with a certain role can delete a strategic brief template. Refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information on user roles.

To delete a strategic brief template:

- 1 Open the desired strategic brief TMFR by using the TMFR Search tab or Taxonomy tab.
- 2 Click **Edit**.
- 3 Click the **show document admin >>** link. As figure 2-5 shows, a new section appears prompting you to provide the reason for deleting the strategic brief template.

Figure 2-5: Verifying a strategic brief template removal

[« hide document admin](#)

Would you like to remove this document from the system? In the space provided below, please provide a brief explanation as to why this document is being removed from the system:	
To Be Deleted By: John Smith To Be Deleted On Date: 11/29/2007	<div></div> <div>Continue</div>

- 4 Enter the reason for deleting the TMFR.
- 5 Click **Continue**. You will be asked to confirm the cancellation.
- 6 Click **Confirm Delete**.

Strategic Briefs

Strategic briefs are created based on defined TMFRs. Strategic briefs represent the high level strategic programs outlined by your business unit.

Access strategic briefs by selecting **New Product Development > Strategic Briefs** from the left navigation panel. Agile PLM for Process displays the Strategic Briefs search page, as figure 2-6 shows below. Search for and select the desired strategic brief.

Figure 2-6: Strategic Briefs search page

The screenshot shows the 'Strategic Briefs' search interface. At the top right is a 'Create New' button. Below the title 'Strategic Briefs' is a 'Search Criteria' section. It includes a dropdown menu set to 'Title', a 'Contains' operator dropdown, an empty search input field, and a 'more criteria...' link. Below these are 'Search' and 'Reset' buttons. To the right are 'Save Search' and 'Load Search' buttons. A 'Search Results' section at the bottom shows 'Results Per Page' set to '10' with a dropdown arrow.

Figure 2-7 below shows the Strategic Brief page. It consists of the following tabs:

- Summary
- Project Team
- Strategic Brief
- Activities
- Supporting Documents
- Signatures/Approval

Figure 2-7: Strategic Brief page, Summary tab

Strategic Brief

Summary Project Team Strategic Brief Activities Supporting Documents Signatures / Approval

Summary Information

Title:

Strategic Brief #: 5002592

Status: Draft

Brands:

Demographics:

Channels:

Business Unit(s):

Global Categories:

Lead Countries:

Key Sponsors:

Title and Business Unit(s) are required fields.

Summary Tab

Key fields include:

- **Title**—Title for the strategic brief. This is a required field.
- **Strategic Brief #**—This ID is automatically generated by the system and cannot be changed.
- **Status**—This field refers to the workflow status for this strategic brief. Refer to the [Strategic Brief Lifecycle](#) on page 2-1 for more details.
- **Business Unit(s)**—This multi-select field is used to decide which TMFR to use for this strategic brief. This is a required field.

Project Team Tab

Use this tab, shown in figure 2-8 below, to define the project team. Refer to [Team Member Formulation Requirements Section](#) on page 2-3 page for more information on using this page.

Figure 2-8: Project Team tab

SaveSave & CloseCancelWorkflow

NPD - New Plan For Action

SummaryProject TeamStrategic BriefActivitiesSupporting DocumentsSignatures / Approval

Team Member Formulation Requirements

Functional Area	Team Member(s)	Gate Keeper(s)	Additional Notification	Guidance

Add/Update Team Members

Additional Team Member Formulation Requirements

Functional Area	Team Member(s)	Gate Keeper(s)	Additional Notification

Add/Update Team Members

Strategic Brief Tab

Use the Strategic Brief tab, shown in figure 2-9 below, to define key points about the strategic brief, such as major points about the opportunity, consumer insight, fit with existing competencies and capabilities, and competitive environment. These are free-text fields. This tab may not display based on your configuration settings.

Figure 2-9: Strategic Brief tab

The screenshot shows a software interface for creating a new plan of action. At the top, there's a title bar "NPD - New Plan For Action". Below it is a tabbed interface with six tabs: "Summary", "Project Team", "Strategic Brief" (which is currently selected), "Activities", "Supporting Documents", and "Signatures / Approval". The "Strategic Brief" tab is divided into two sections. The first section, "Describe the Opportunity", contains four rows. Each row starts with a label "Major Points:" followed by a text prompt. The first row has the prompt "New Market Potential.", the second "Alignment with Brand Strategy.", the third "Product Differentiation (how to build and maintain).", and the fourth "Effect on current product / cannibalize.". Each row has a large text input field and a small vertical scroll button on the right. The second section, "Describe the Category", contains one row with the label "Major Points:" and the prompt "Size, Expected Growth.", also followed by a text input field and a scroll button.

NPD - New Plan For Action

Summary Project Team **Strategic Brief** Activities Supporting Documents Signatures / Approval

Describe the Opportunity

Major Points: New Market Potential.

Major Points: Alignment with Brand Strategy.

Major Points: Product Differentiation (how to build and maintain).

Major Points: Effect on current product / cannibalize.

Describe the Category

Major Points: Size, Expected Growth.

Activities Tab

The Activities tab, shown in figure 2-10 below, displays activities tied to the strategic brief, such as signature document requests.

Figure 2-10: Activities tab

The screenshot shows the 'Activities' tab selected in the 'NPD - New Plan For Action' window. At the top right are buttons for 'Save', 'Save & Close', 'Cancel', and 'Workflow'. Below the title bar is a tabbed interface with 'Summary', 'Project Team', 'Strategic Brief', 'Activities' (selected), 'Supporting Documents', and 'Signatures / Approval'. The main content area is a table with three columns: 'Global Checklist Items', 'Online Tools', and 'Current Status'. The first row shows 'Strategic Brief Approval' under Global Checklist Items, 'The System will automatically request appropriate signatures based on business case.' under Online Tools, and an empty cell under Current Status.

Global Checklist Items	Online Tools	Current Status
Strategic Brief Approval	The System will automatically request appropriate signatures based on business case.	

Supporting Documents Tab

Use this tab to attach documents to the strategic brief.

Figure 2-11: Supporting Documents tab

The screenshot shows the 'Supporting Documents' tab selected in the 'NPD - New Plan For Action' window. At the top right are buttons for 'Save', 'Save & Close', 'Cancel', and 'Workflow'. Below the title bar is a tabbed interface with 'Summary', 'Project Team', 'Strategic Brief', 'Activities', 'Supporting Documents' (selected), and 'Signatures / Approval'. The main content area has a header 'Supporting Documents' followed by the text 'There are no attachments'. Below this is a button labeled '» Add a Supporting Document'.

Signatures/Approval Tab

This tab displays an entry for workflow-based changes to the strategic brief. The entries are read-only and cannot be changed.

Figure 2-12: Signatures/Approval tab

[Save](#) [Save & Close](#) [Cancel](#) [Workflow](#)

Strategic Brief

[Summary](#) [Project Team](#) [Strategic Brief](#) [Activities](#) [Supporting Documents](#) [Signatures / Approval](#)

Current Status

Current Owner: John Smith
Current Status: Draft
Desired Action: This specification is currently in draft status

Start Date: 11/29/2007
Amber Date: -----
Red Date: -----

Global Checklist Items

Global Checklist Items	Online Tools	Current Status
Strategic Brief Approval	The System will automatically request appropriate signatures based on business case.	

Event History

Event	User	Time	Comments

[show document admin »](#)

Working with Strategic Briefs

Searching for Existing Strategic Briefs

To search for an existing strategic brief:

- 1 Click the **New Product Development > Strategic Briefs** link in the left navigation panel. The Search Criteria page displays, as figure 2-13 shows:

Figure 2-13: Search Criteria page

- 2 In the key field list, select a field from the drop-down list.
- 3 In the operator field, select an operator (either “Equals”, “Starts With”, or “Contains”).
- 4 In the search term field, enter the value you are looking for.
- 5 If you want to search for additional criteria, click on **more criteria**. You can add up to two additional lines of criteria.
- 6 Click on **Search** to perform the search. Returned results display in the Search Results section.
- 7 Click on the hyperlinked strategic brief title to open up that strategic brief.




Creating a Strategic Brief

To create a strategic brief:

- 1 Click the **New Product Development > Strategic Briefs** link in the left navigation panel.
- 2 Click **Create New**. The Business Unit dialog box is displayed.
- 3 Choose one or many business units from the dialog box and click **Done**.

Note The business unit determines which TMFR will be used based on the business units of the templates. If multiple business units are selected, the TMFRs will be combined for the strategic brief.



- 4 Input data into the Summary tab fields by typing in free-text or clicking on the field name link to view popup selection windows.
- 5 Click **Save**.
- 6 Click the **Project Team** tab. The TMFR will be inherited from the corresponding strategic brief template and be displayed in the Team Member Formulation Requirements section.
- 7 If needed, edit the TMFR by clicking **Add/Update Team Members**.

- 8 To add new team members, click **Add/Update Team Members** in the Additional Team Members Formulation Requirements section, as needed.
- 9 Click **Add New**.
- 10 Select the functional area.
- 11 Click the add data icon () under the Team Members, Gate Keepers and Additional Notifies columns to bring up the user search page.
- 12 Search for and select user name(s), and then click **Done**.
- 13 Click the apply changes icon () to confirm.
- 14 Repeat steps 9 through step 13 as needed for the other functional areas.
- 15 Click the **Strategic Brief** tab.
- 16 Fill in the form as needed. There are no required fields.
- 17 Click on **Supporting Documents** tab.
- 18 Click on the **Add a Supporting Document** link to attach documents, as needed.
- 19 Click **Save**.
- 20 Click **Workflow**, add comments in the **Comments** field (required), then click the move step forward icon (). The strategic brief moves to the next step in the workflow.

Approving a Strategic Brief

The gatekeepers of a strategic brief will have an action in the NPD Signature Requests section on their Action Items page when an approval is requested from them. They will also receive an email notifying them that their signature has been requested.



To approve or reject the strategic brief:

- 1 Click on the selected strategic brief action item, or on the hyperlink contained in the email notification
- 2 Review contents of strategic brief by clicking the link to launch the strategic brief.
- 3 Close the strategic brief window.
- 4 Click **Workflow**.
- 5 Add comments as needed and select **GO** or **NO GO**.
- 6 Click the move step forward icon () to approve the strategic brief or the move step back icon () to reject the strategic brief.

Moving a Strategic Brief to the Next Step in the Workflow

To move the strategic brief forward in the workflow:

- 1 Click on the selected strategic brief action item, or on the hyperlink contained in the email notification to open the strategic brief.
- 2 Click the **Signatures/Approval** tab.
- 3 Review the current status of signature requests. When all requested signatures have been received as GO, the owner may progress the strategic brief in the workflow.
- 4 Click **Workflow**.

- 5 Add comments as needed.
- 6 Click the move step forward icon () or the move step back icon () to move the strategic brief forward or backward in the workflow.

CHAPTER 3

Using Metrics

This chapter describes how to use metrics to manage projects. It includes the following topics:

- ❑ *Metrics Overview*
 - ❑ *Creating Metrics*
-

Metrics Overview

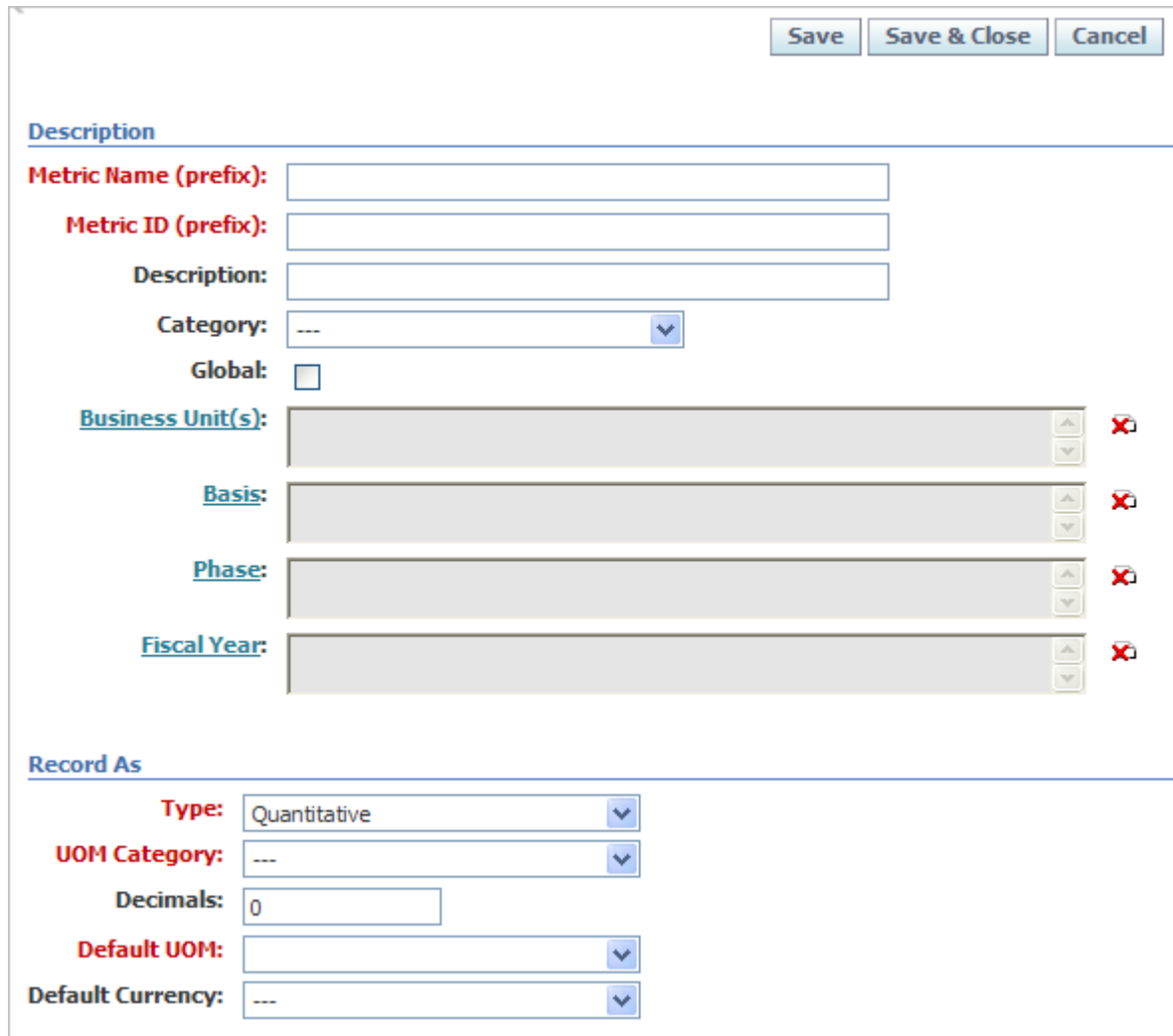
Use metrics to collect data and track the progress of projects, innovation sales pipelines (ISPs), and portfolios. Metrics are created in a library used within projects and activities, and can be used within a portfolio. You can manually enter metric values or import values using an Excel spreadsheet.

Creating Metrics

To create a new metric:

- 1** Click **Data Management > Project Metrics** from the left navigation panel.
- 2** Click **Create New**. The dialog box that is displayed contains two sections: Description and Record As, as figure 3-1 shows below.

Figure 3-1: New metrics dialog box



The dialog box is titled "New metrics dialog box" and contains two main sections: "Description" and "Record As". At the top right are three buttons: "Save", "Save & Close", and "Cancel".

Description Section:

- Metric Name (prefix):** A text input field.
- Metric ID (prefix):** A text input field.
- Description:** A text input field.
- Category:** A dropdown menu with a blue arrow icon.
- Global:** A checkbox.
- Business Unit(s):** A list box with a grey background, a vertical scrollbar, and a red 'X' icon on the right.
- Basis:** A list box with a grey background, a vertical scrollbar, and a red 'X' icon on the right.
- Phase:** A list box with a grey background, a vertical scrollbar, and a red 'X' icon on the right.
- Fiscal Year:** A list box with a grey background, a vertical scrollbar, and a red 'X' icon on the right.

Record As Section:

- Type:** A dropdown menu with "Quantitative" selected and a blue arrow icon.
- UOM Category:** A dropdown menu with "---" selected and a blue arrow icon.
- Decimals:** A text input field with "0" entered.
- Default UOM:** A dropdown menu with a blue arrow icon.
- Default Currency:** A dropdown menu with "---" selected and a blue arrow icon.

Description Section

Use this section to define basic elements of the metric, as figure 3-2 shows below:

Figure 3-2: Description section

Description

Metric Name (prefix):

Metric ID (prefix):

Description:

Category: ▼

Global: ☐

Business Unit(s): ▲ ▼ ✕

Basis: ▲ ▼ ✕

Phase: ▲ ▼ ✕

Fiscal Year: ▲ ▼ ✕

Key fields include:

- **Metric Name (prefix)**—The name of the metric. This is a required field.
- **Metric ID (prefix)**—This is a prefix to the metric ID and is used when importing the metric data from Excel as well as when defining layouts within a portfolio. This is a required field. The Metric ID must not contain spaces. For field exchange to work with Excel, the metric ID must begin with an alphabetic character. The Basis, Phase, and Fiscal Year abbreviations are appended to this prefix to create the final ID.
- **Basis, Phase and Fiscal Year**—These fields are dimensions of the metric. When you use this metric on a project or ISP, you will be required to fill in the same information. The data that you will choose from will be what is populated here. Example, if you choose a Fiscal Year of “FY07” and “FY08”, when you use this metric on a project the only options for Fiscal Year are “FY07” and “FY08”.

Record As Section

Use this section to define the data type for the metric, as figure 3-3 shows below:

Figure 3-3: Record As section

Record As

Type: ▼

UOM Category: ▼

Decimals:

Default UOM: ▼

Default Currency: ▼

Key fields include:

- **Type**—The type of data for the metric. This is a required field. Available drop-down choices are “Quantitative”, “Text”, and “Date”.
- **UOM Category**—Required if “Quantitative” is selected for Type. This field does not appear if “Text” or “Date” is selected for **Type**. Available drop-down choices are:
 - Count
 - Mass
 - Monetary
 - Percent
 - Time
 - Volume
- **Default UOM**—Required if “Quantitative” is selected for **Type**. Drop-down choices vary based on the selection made in the **Type** field.

3 Click Save.

Refer to [Project Templates](#) on page 5-24 and [Metrics Tab](#) on page 5-37 for more information on applying metrics to projects.

Refer to [Working with Metrics](#) on page 4-15 for more information on applying metrics to ISPs.

Refer to [Portfolio Management](#) on page 7-1 for more information on using metrics within portfolios.

Using Innovative Sales Pipeline

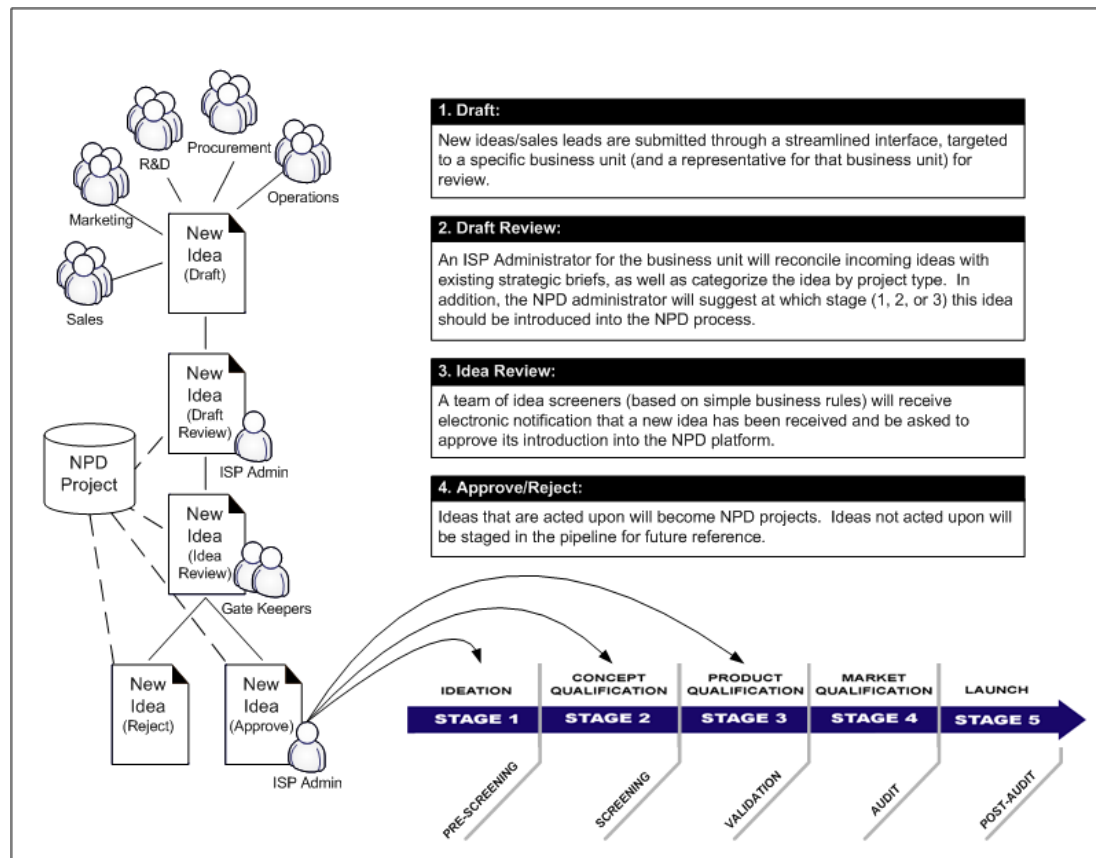
This chapter describes how to use the Innovative Sales Pipeline feature. It includes the following topics:

- ❑ *Innovative Sales Pipeline Overview*
- ❑ *Using Innovative Sales Pipeline Templates*
- ❑ *Using Innovative Sales Pipelines*

Innovative Sales Pipeline Overview

An innovation sales pipeline (ISP) serves as a clearinghouse that is designed to capture and pre-screen incoming ideas and new opportunities. As figure 4-1 shows, each new ISP is pre-screened, linked to NPD, and passed through a review process toward disposition.

Figure 4-1: Turning ideas into an ISP



Using Innovative Sales Pipeline Templates

Use ISP templates to help standardize your company's processes and to reduce the amount of work required to create new ISPs. When an ISP is created, it pulls data in from an ISP template based on the business unit that is defined on both the ISP and the template. The Administrators, Private flag, ISP Metrics, and Toolbox documents are carried forward from the template.

A certain role is needed to create, update, and delete ISP templates. Please refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information.

ISP Template Page

Create an ISP template using the ISP Template page, shown in figure 4-2 below. To access the page, select **Templates > ISP Templates** from the left navigation panel. The ISP Template page consists of two tabs: Summary and Toolbox. For detailed instructions on creating an ISP, see [Creating an ISP](#) on page 4-8.

Summary Tab

The Summary tab, shown in figure 4-2 below, contains three sections:


- Header
- ISP Metrics
- Event History


Figure 4-2: Summary tab

[Create New Copy](#) [Edit](#)

ISP Template

[Summary](#) [Toolbox](#)

Title: New Idea Template 




Description: This is a sample template 

Administrators: Pam Cooper

Business Unit(s): North America

Private?: ☐

ISP Metrics

Metric	Category	Basis	Phase	Fiscal Year
Concept Score - Like or Dislike 	Product	No Basis	No Phase	No Fiscal Year
Concept Score - New and Different 	Product	No Basis	No Phase	No Fiscal Year
Concept Score - Overall 	Product	No Basis	No Phase	No Fiscal Year

Event History

Event	User	Date	Comments
Edit	David Carter	9/7/2007 12:36:53 AM	
Edit	David Carter	9/6/2007 7:57:30 AM	added metrics
Created	David Carter	7/9/2007 1:24:53 PM	added metrics

Header Section

Use this section, shown in figure 4-3 below, to enter key details about the ISP template. Some of these fields will act as defaults for the ISP.

Figure 4-3: Header section

ISP Template

Summary **Toolbox**

Title:

Description:

Administrators:

Business Unit(s):

[» clear Business Unit values](#)

Private?: ☐

Key fields include:

- **Title**— Title of the template. This is a required field.
- **Administrators**—Users listed here will be carried to the ISP and will display as administrators for the ISP. This is a required field.
- **Business Unit(s)**—The business unit that this template belongs to. This is a required field.
- **Private?**—This field will be carried to the ISP. When checked, this flag will make the ISP accessible to only the team members and users with a certain administration role.

ISP Metrics Section

Use this section to define the default metrics for ISPs that use this template, as figure 4-4 shows below.

Figure 4-4: ISP Metrics section

ISP Metrics

<u>Metric</u>	<u>Category</u>	<u>Basis</u>	<u>Phase</u>	<u>Fiscal Year</u>

Add New

To add a metric click **Add New**. This opens a metric search page. Search and select the metric to add. Refer to [Using Metrics](#) on page 3-1 for more information.

Event History Section

The Event History section, shown in figure 4-5, shows a list of workflow actions for this ISP. These are automatically added by the system and cannot be changed.

Figure 4-5: Event History section

Event History			
Event	User	Date	Comments
Created	David Carter	9/17/2007 7:22:16 AM	Creation

Toolbox Tab

The Toolbox tab contains a checklist of items and related supporting documents needed for the ISPs that are based on the current template. This is typically where you attach businesses ideation documents.

Add checklist items by clicking **Add New**. You can remove or reorder items by clicking **Reorder/Remove**.

Figure 4-6: Toolbox tab

ISP Template	
Summary	Toolbox
Objective	Documents
Add New	Reorder/Remove

Creating a New ISP Template

To create a new ISP template:

- 1 Click the **Templates > ISP Templates** link in the left navigation panel.
- 2 Click **Create New**. A new ISP template opens in the ISP Template page, as figure 4-7 shows below:

Figure 4-7: New ISP template

ISP Template

Summary
Toolbox

Title:

Description:

Administrators:

Business Unit(s):

» clear Business Unit values

Private?: ☐

ISP Metrics

Metric	Category	Basis	Phase	Fiscal Year	

Event History

Event	User	Date	Comments

- 3 Fill out the Summary tab as described on page 4-3 through page 4-5.
- 4 Attach related documents and checklist items using the Toolbox tab if applicable.
- 5 Click **Save** or **Save & Close**.

Understanding the ISP Lifecycle

The lifecycle of an ISP consists of several stages, as defined below.

Draft Stage

This is the starting stage for an ISP. New ideas and sales leads are submitted for a specific business unit.

The administrators, metrics, and toolbox attachments are pulled in from the ISP template.

Draft Review Stage

An ISP administrator for the business unit reconciles incoming ideas (ISPs) with existing strategic briefs, selects a strategic brief, and categorizes the idea by project type. In addition, the NPD administrator indicates at which stage this idea should be introduced into the NPD process.

Idea Review Stage

During this stage, a team of idea screeners and gatekeepers receive electronic notification that a new idea has been received. Approval will be requested from the gatekeepers. The Link to NPD tab contains fields populated by the strategic brief that was selected in the Draft Review stage. The Gate Keeper(s) tab is populated with data from a related project template that is selected based on business unit.

Approved Stage

In this final stage, ISPs are not editable. NPD projects can now be generated from the ISP. The data from the Link to NPD tab is used to create the new project.

Using Innovative Sales Pipelines

Creating an ISP

To create an ISP:

- 1 Click **New Product Development > Innovations/Sales Pipeline** from the left navigation panel. The ISP search page is displayed.
- 2 Click **Create New**. A window displays available ISP templates.
- 3 Select the ISP template that most closely resembles the ISP that you are creating, then click **Done**.
- 4 Provide a name for the ISP in the **Title** field (required).
- 5 Click **Done**.

Once you select an ISP template, you can further define an ISP using the ISP page, which is shown in figure 4-8 below.

Figure 4-8: ISP page

ISP - New Prodika Test Metric

Summary Metrics Toolbox Supporting Documents Signatures / Approval

Originator: **Reed, Tim**

Title:

Description: test

Request Date:

Internal Project #:

Status: Draft

Administrators:

Private: ☐ (Only Project Team may read)

Note that this ISP is in the Draft stage, so the Link to NPD and the GateKeeper(s) tabs do not display.

The ISP page contains the following tabs:

- Summary
- Metrics
- Toolbox
- Supporting Documents
- Link to NPD (appears during all stages except “Draft”)
- Gate Keeper(s) (appears during all stages except “Draft”)
- Signatures/Approval

Summary Tab

Header Section

Use the Summary tab to define the ISP. Figure 4-8 on page 4-8 shows the Summary tab. Key fields in the Header section include:

- **Originator**—This field is auto-populated with the name of the user who created the ISP.
- **Title**—The title of the ISP. This is a required field.
- **Status**—The current status of the ISP. See [Understanding the ISP Lifecycle](#) on page 4-7 for more details.
- **Administrators**—The names of administrators are automatically filled in according to the template. Administrators are the users that are responsible for managing the ISP.
- **Private**—Check the **Private** checkbox to prevent all users but the administrators, owner, TMFR members, and users with a certain role from accessing it. When not checked, this ISP is visible to all users.

Metrics Tab

The Metrics tab, shown in figure 4-9 below, contains the default metrics defined in the ISP template.

Note The ISP Metrics section is only visible to users with a certain role, and only users with a certain role may edit or add metrics. Refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information.

Figure 4-9: Metrics tab

Save Save & Close Cancel Workflow

ISP - Coconut Chicken Strips

Summary **Metrics** Toolbox Supporting Documents Link To NPD Gate Keeper(s) Signatures / Approval

ISP Metrics

Metric	Category	Basis	Phase	UOM	No Fiscal Year
Concept Score - Like or Dislike	Product	No Basis	No Phase	actual	11.0
Concept Score - New and Different	Product	No Basis	No Phase	actual	22.0
Concept Score - Overall	Product	No Basis	No Phase	actual	46.8

Setup Metrics Display Filters

Filtering Metrics

To filter the list of metrics displayed:

- 1 Click the **Display Filters** link. The Filter Metrics dialog box is displayed, as figure 4-10 shows:

Figure 4-10: Filtering metrics

- 2 Click the linked fields to define metric filtering criteria using a dialog box.
- 3 Click **Done** after selecting the criteria.
- 4 Click **Save**.


Adding Metrics

To add new metrics:

- 1 Click **Edit** to display the screen in edit mode.
- 2 Click **Setup Metrics**. The ISP page refreshes and the metrics rows display in edit mode, as shown in figure 4-11 below.

Figure 4-11: Metrics tab in edit mode

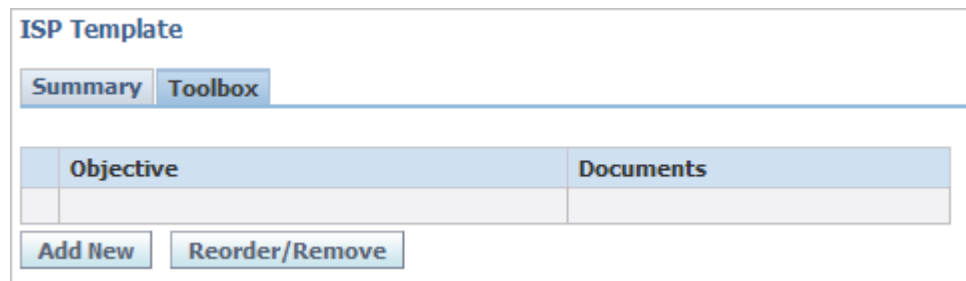
	Metric	Category	Basis	Phase	Fiscal Year	
	Concept Score - Like or Dislike	Product	No Basis	No Phase	No Fiscal Year	
	Concept Score - New and Different	Product	No Basis	No Phase	No Fiscal Year	
	Concept Score - Overall	Product	No Basis	No Phase	No Fiscal Year	

- 3 Click **Add New**.
- 4 In the search dialog page that opens, search for and select the metrics you want to add, then click **Done**. The metric you added displays in the ISP Metrics table.
- 5 Click the edit icon () to define the category, basis, phase, and fiscal year for each new metric.
- 6 Click **Save**.

Toolbox Tab

The Toolbox tab contains a checklist of items and their supporting documents needed for the current ISP. The checklist is created on the ISP template. Figure 4-12 below shows the Toolbox tab.

Figure 4-12: Toolbox tab



The screenshot shows the 'ISP Template' interface with the 'Toolbox' tab selected. It features a table with two columns: 'Objective' and 'Documents'. Below the table are two buttons: 'Add New' and 'Reorder/Remove'.

Objective	Documents

Add New **Reorder/Remove**

Supporting Documents Tab

Use the Supporting Documents tab to upload a document to the ISP. Each document is a collection of attachments supporting the ISP. The Documents column displays the name of the document.

Figure 4-13: Supporting Documents tab

The screenshot shows the 'ISP - Coconut Chicken Strips' interface. At the top right are buttons for 'Save', 'Save & Close', 'Cancel', and 'Workflow'. Below the title is a tabbed interface with 'Summary', 'Metrics', 'Toolbox', 'Supporting Documents' (selected), 'Link To NPD', 'Gate Keeper(s)', and 'Signatures / Approval'. Under the 'Supporting Documents' tab, there is a table with two columns: 'Last Modified' and 'Documents'. The table contains one row with the date '9/7/2007' and the document name 'Idea Screening document'. Below the table is a button labeled '» Add a Supporting Document'.

Adding a Document

To add a document:

- 1 Click **» Add a Supporting Document**. The Attachments/Comments dialog box displays, as shown in figure 4-14.

Figure 4-14: Attachments dialog box

The screenshot shows the 'Attachments/Comments' dialog box. At the top right are 'Done' and 'Cancel' buttons. Below the title bar is a 'Comments:' section with a text area containing 'Idea Screening document'. Below this is an 'Attach Files' section. It contains instructions: 'Click **Browse** to select a file and then click the **Attach File** to add the file. If you do not see a "Browse" button, your browser does not support attachments.' Below the instructions is a text input field, a 'Browse...' button, and an 'Attach File' button. A red note states: '*NOTE: An attached file may not exceed 4MB in size and must NOT include !, #, \$, %, *, &, ?, /, + characters.' At the bottom is a table with three columns: 'Attached files', 'Size', and 'Remove?'. The table contains one row with the file name 'Concept Screener v2.xls', a size of '24k', and a red 'X' icon in the 'Remove?' column.

- 2 Upload attachments by clicking **Browse** to locate and select the file, then click **Attach File**. The document displays in the Attached files section.
- 3 Enter a name for the document in the **Comments** field.
- 4 Click **Save**.

Gate Keeper(s) Tab

Use the Gate Keeper(s) tab to define the TMFRs for the ISP. As figure 4-15 shows, the top section, Team Member Formulation Requirements, is imported from the project template that the ISP resolved to. Use the bottom section, Additional Team Member Formulation Requirements, to add members that were not defined on the project template.

Figure 4-15: Gate Keepers tab

ISP - Coconut Chicken Strips

Save Save & Close Cancel Workflow

Summary Metrics Toolbox Supporting Documents Link To NPD **Gate Keeper(s)** Signatures / Approval

Team Member Formulation Requirements

Functional Area	Gate Keeper(s)	Additional Notification	Guidance
Executive	Rebecca Newton Required		
Marketing	John Smith Required		

Add/Update Team Members

Additional Team Member Formulation Requirements

Functional Area	Gate Keeper(s)	Additional Notification

Add/Update Team Members

Key fields include:

- **Functional Area**—The functional area (such as Marketing) that the rest of the data within its row refers to.
- **Gate Keeper(s)**—These members will be required to sign off on the Idea Review workflow step before it is allowed to proceed to the next step in the workflow.
- **Additional Notification**—These members will receive an email notification as the ISP enters a new workflow step.
- **Guidance**—This is a text field where you can provide guidance to a team leader regarding the role that should be assigned for this part of the TMFR.

Link to NPD Tab

The information on the Link to NPD tab is used when a new project is created based on a defined strategic brief. The Link to NPD tab contains fields populated by the strategic brief that was selected in the Draft Review stage. When a new project is created from the ISP, the information on this tab will be transferred to the project.

Note The Link to NPD tab does not display for ISPs in “Draft” status.

Figure 4-16: Link to NPD tab

ISP - Coconut Chicken Strips

[Edit](#) [Workflow](#) [Admin](#)

[Summary](#) [Metrics](#) [Toolbox](#) [Supporting Documents](#) [Link To NPD](#) [Gate Keeper\(s\)](#) [Signatures / Approval](#)

Project Information

Project Title: Coconut Chicken Strips

Target Stage: Stage 3 - Product Qualification

Status: Idea Review

Make Project Private: ☐ (Only Project Team may read)

Strategic Brief:

Other Strategic Briefs:

Project Type: Current Brand » Existing Product Category (for This Business Unit) » New Product

Business Unit(s): North America

Brands:

Demographics:

Channels:

Global Categories:

Project Visibility:

Lead Countries:

Team Leader(s):

Key fields include:

- **Project Title**—The name of the project. You can change the name of the project at any stage except for Approved.
- **Target Stage**—The stage where the project starts after the ISP is completed. This is a required field.
- **Strategic Brief**—The strategic brief that the project is based on.
- **Project Type**—The type of project that is project is based on. This is a required field.
- **Business Unit(s)**—The business units affiliated with this project. This is a required field.

See [Using Projects and Activities](#) on page 5-1 for more information on creating and working with projects.

Signatures/Approval Tab

Use the Signature Approval tab, shown in figure 4-17 below, to view the workflow step that the ISP is in, as well as the workflow event history. This tab consists of the following three sections:

- **Current Status** — Snapshot view of the ISP's workflow summary
- **Global Checklist Items** — Details about the ISP's approvals for each of the current and past stages
- **Event History** — Listing of workflow transitions. These actions are generated by the system and cannot be changed.

Figure 4-17: Signature/Approval tab

[Save](#) [Save & Close](#) [Cancel](#) [Workflow](#)

ISP - Coconut Chicken Strips

[Summary](#) [Metrics](#) [Toolbox](#) [Supporting Documents](#) [Link To NPD](#) [Gate Keeper\(s\)](#) [Signatures / Approval](#)

Current Status

Current Owner: David Carter
Current Status: Idea Review
Desired Action: ISP Idea Review

Start Date: 9/7/2007
Amber Date: 9/14/2007
Red Date: 9/17/2007

Global Checklist Items

Global Checklist Items	Online Tools	Current Status
	The System will automatically request appropriate signatures based on business case.	Marketing - Beth Daniels (Review) ■ Review (David Carter 9/7/2007) Executive - Paul Roberts (Review) ■ Review (David Carter 9/7/2007)

Event History

Event	User	Time	Comments
Transitioned to 'Idea Review'	David Carter	9/7/2007 9:00 AM	Test comment
Transitioned to 'Draft Review'	David Carter	9/7/2007 8:58 AM	
Created	David Carter	9/7/2007 8:54 AM	

The Start Date, Amber Date, and Red Date fields control the Green/Amber/Red status indicator on the NPD Signature Requests section of the Action Items page.

Working with Metrics










Adding Metrics to an ISP

Metrics are automatically pulled in to an ISP from the ISP template.

To manually add metrics:

- 1 Open an ISP that is not in an “Approved” stage.
- 2 Click the **Metrics** tab.
- 3 Click **Edit**.
- 4 Click **Setup Metrics** under the ISP Metrics table. An **Add New** button is displayed.
- 5 Click **Add New**. A metric search page is displayed.
- 6 Search for the metrics to add.
- 7 Select the metrics.
- 8 Select **Done**. The main ISP page is displayed with the Metrics tab selected. The ISP Metrics table contains the metrics that you added.

Figure 4-18: Manually added metric

ISP Metrics						
	Metric	Category	Basis	Phase	Fiscal Year	
	Concept Score - Like or Dislike 	Product	No Basis	No Phase	No Fiscal Year	
	Concept Score - New and Different 	Product	No Basis	No Phase	No Fiscal Year	
	Concept Score - Overall 	Product	No Basis	No Phase	No Fiscal Year	
<div> <div>Add New</div> <div>View Metrics</div> </div>						


- 9 To edit the metric, click the edit icon () on the corresponding row.
- 10 In the ISP Metric dialog box that appears, fill in the Bases, Phases, and Fiscal Years data, as figure 4-19 shows below:


Figure 4-19: ISP Metric dialog box


ISP Metric


Done Cancel

Select ISP Metric

Metric: Concept Score - Overall

Bases: No Basis 

Phases: No Phase 

Fiscal Years: No Fiscal Year 

- 11 Click **Done**. The dialog box closes, and the metric row reflects the changes that you made.
- 12 Click **View Metrics**.
- 13 Click **Save**.

Manually Editing Metric Values**To manually edit metric values:**

- 1 Open an ISP that is not in an “Approved” stage.
- 2 Click the **Metrics** tab.
- 3 Click **Edit**.




- 4 Click the **Setup Metrics** button under the ISP Metrics table.
- 5 Click the edit icon () on the row of the metric that you want to edit.
- 6 Click the add metric values icon () in the Metric column. The edit metrics dialog box is displayed, as figure 4-20 shows below:

Figure 4-20: A metrics



Basis	Phase	FY	Value	Data Source
No Basis	No Phase	No Fiscal Year	---	From Calculation

- 7 Click one of the edit icons, either on the column or row. The **Data Source** column becomes a drop-down list.
- 8 Select **From Override** in the Data Source drop-down list if it is not already selected. The **Value** column becomes editable.
- 9 Edit the value as desired.
- 10 Click the apply changes icon (). The metric row reflects the changes that you made.
- 11 Click **Done**.
- 12 When finished, click **View Metrics**.
- 13 Click **Save**.

Identifying the Metric IDs

Metric IDs are a concatenation of the metric ID prefix and abbreviations of the basis, phase, and fiscal year.

To identify the metric IDs:


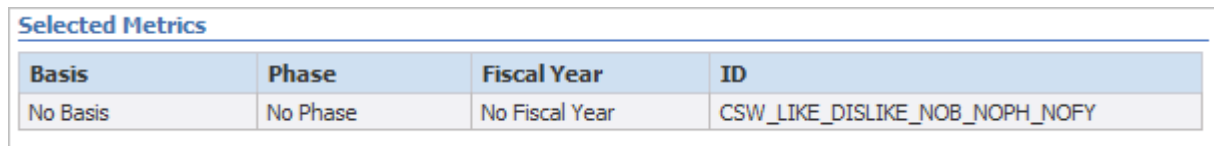
- 1 Open an ISP that is not in an “Approve” stage.
- 2 Click the **Metrics** tab.
- 3 Click the view details icon () in the Metric column. The Selected Metrics dialog box will be displayed, as figure 4-21 shows below:

Figure 4-21: Selected Metrics dialog box



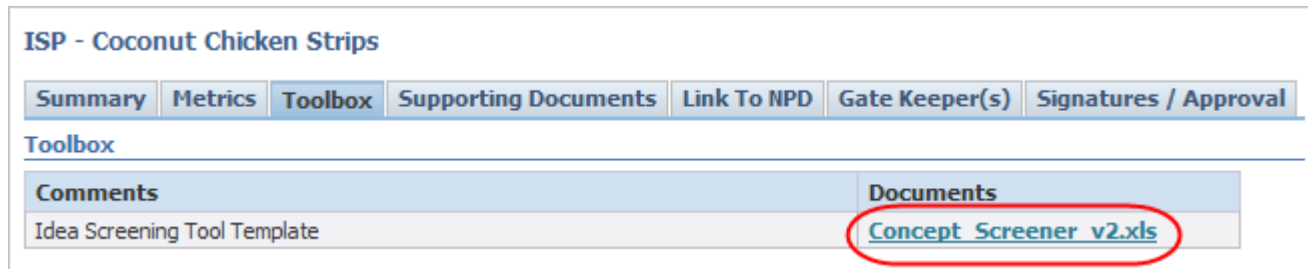
Basis	Phase	Fiscal Year	ID
No Basis	No Phase	No Fiscal Year	CSW_LIKE_DISLIKE_NOB_NOPH_NOFY

- 4 Review the ID field, which contains the ID of the metric corresponding to the basis, phase, and fiscal year.
- 5 Click **Done**.

Importing Metrics from Excel

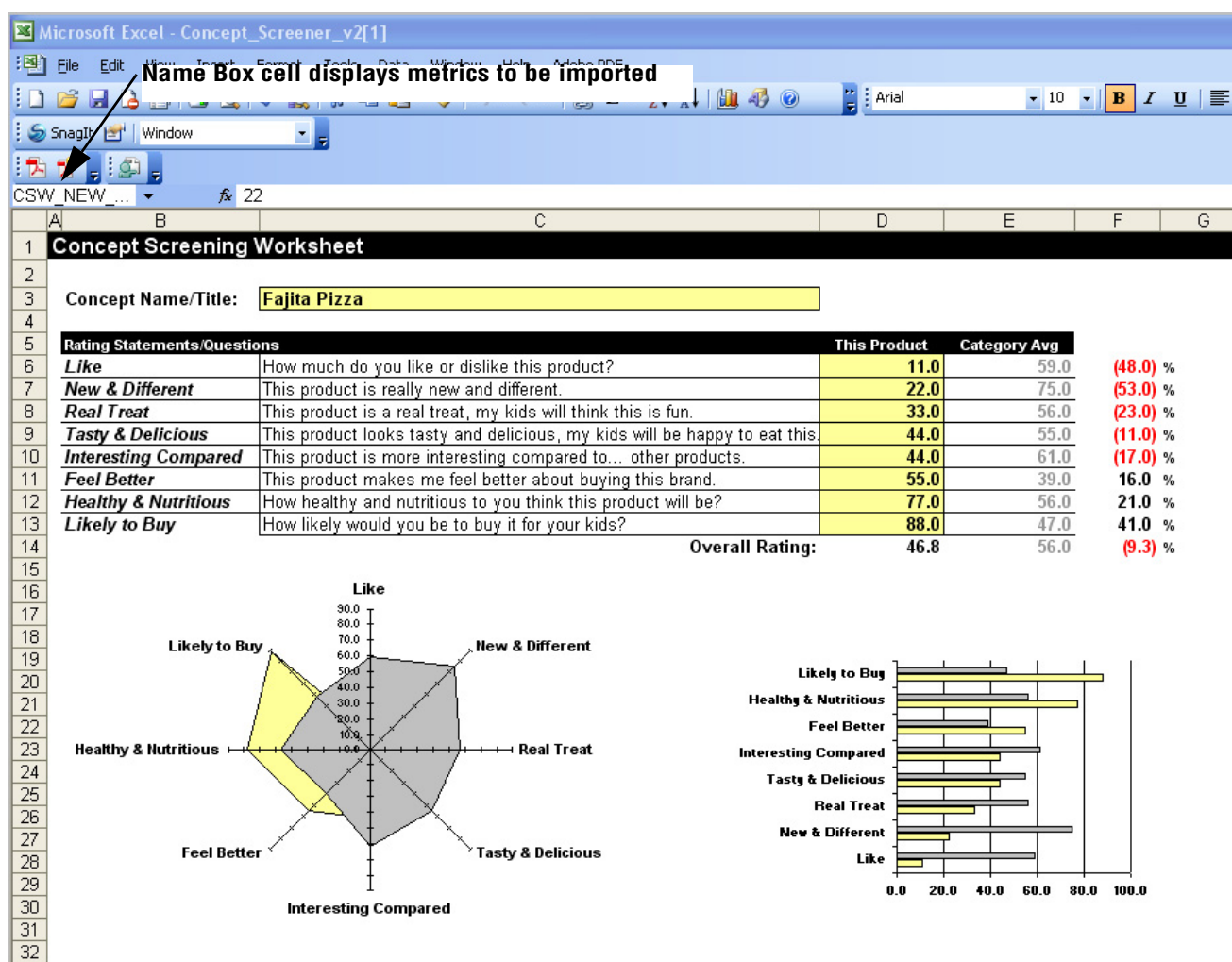
You can import metrics from an Excel spreadsheet. The Documents field in the Toolbox tab, shown in figure 4-22 below, might contain a spreadsheet that can be used to upload certain metrics.

Figure 4-22: Attached Excel spreadsheet



To create a spreadsheet that can be used for metric upload, open Microsoft Excel. Select a cell that will contain the data for the metric. The Name Box cell, located above the A column, is set to the ID of the metric to be imported. Create one cell for each metric. This spreadsheet can now be used to import data by populating the above cells with the appropriate data and attaching the spreadsheet to this ISP in the Supporting Documents tab. Figure 4-23 below shows a sample spreadsheet.

Figure 4-23: Sample spreadsheet



If multiple spreadsheets have been uploaded, the numeric metrics will be summed and the text metrics will be populated by the latest uploaded file.

To upload metric data from an existing spreadsheet stored in the Toolbox tab:

- 1 Open an ISP that can be edited.

Note To edit an ISP, it must have a status other than “Approved” and you must be the owner or administrator.

- 2 Click the **Toolbox** tab.
- 3 Click the Excel document link in the **Documents** column. A dialog box is displayed asking you to choose to open or save the file.
- 4 Click **Save**.
- 5 Save the document in the desired location.
- 6 A dialog box is displayed asking if you want to open the document.
- 7 Click **Open**. The spreadsheet opens.
- 8 Fill in the appropriate data and save the document by clicking **Save**.

- 9 Click the **Supporting Documents** tab.
- 10 Click **Edit**.
- 11 Click **Add a Supporting Document**.
- 12 Upload the file that you just modified, then click **Done**.
- 13 Click the **Metrics** tab. The values in the FYxx columns reflect the data that was imported.

Performing Other ISP Activities

Creating an ISP

You can create a new ISP using an ISP template as a base.

To create an ISP:

- 1 Click **Create New** on the ISP search page. A dialog box displays ISP templates.
- 2 Select a template, then click **Done**. The ISP page displays.

Figure 4-24: New ISP page

The screenshot shows the 'New ISP' page with a tabbed interface. The 'Summary' tab is active. The form contains the following fields and controls:

- Originator:** Smith, John
- Title:** A required text input field.
- Description:** A text input field.
- Request Date:** A date picker icon followed by a text input field and a red 'X' icon.
- Internal Project #:** A text input field.
- Status:** Draft
- Administrators:** A list box showing a greyed-out area.
- Private:** A checkbox labeled '(Only Project Team may read)'.

- 3 Enter a name for the ISP in the **Title** field (required), then provide information for the other fields and tabs as described in page 4-9 through page 4-15.
- 4 Click **Save**.

Approving an ISP

The gatekeepers of an ISP will have an action in the NPD Signature Requests on their Action Items page when an approval is requested from them. They will also receive an email notifying them that their signature has been requested. Figure 4-25 shows the Signature Request section on the Action Items page:

Figure 4-25: Signature request action items

Action Items

Strategic Briefs and Projects

Innovations/Sales Pipeline Action Items for John Smith

	Description	Owner	Status
	Coconut Chicken Strips (ISP)	Handel Carter	Idea Review
	Fajita Pizza (ISP)	Handel Carter	Draft
	Frozen Smoothie (ISP)	Handel Carter	Draft
	Hamburger on Whole Wheat Bun (ISP)	Handel Carter	Draft

NPD Signature Requests for John Smith

	Title	Owner	Status
	Packaging Change Request - 22mm (Decorative Screw Closures)	Handel Carter	Draft

NPD Action Items for John Smith

	Description	Owner	Status
	(Ideation Demo)	Handel Carter	Draft
	12 Week Post-Audit (rgs v460 proj 1)	Handel Carter	Draft

To approve or reject the ISP:

- 1 Click the selected ISP action item or the hyperlink contained in the email notification. The Signature Request detail dialog box displays, as figure 4-26 shows below:

Figure 4-26: Signature request dialog box choices



Pamela Carter ,	
Your Executive signature has been requested for this ISP .	
Please use the " Workflow " option (in the upper right-hand corner) to submit your approval (or return with comments) once you have reviewed the supporting documents.	
ISP: Coconut Chicken Strips	
Click HERE to review the original ISP	

- 2 Review contents of the ISP by clicking the **Click HERE to review the original ISP** link.
- 3 Close the ISP window by clicking **Close**.
- 4 Click **Workflow**.
- 5 Add comments in the **Comments** section.
- 6 Select **GO** or **NO GO** then click the move step forward icon () or the move step back icon ().

Moving an ISP to the Next Step in the Workflow

To move the ISP forward in the workflow, you must be an administrator for the ISP.

To move an ISP to the next workflow step:

- 1 Click the ISP Action Item linked name in the Innovations/Sales Pipeline Action Items list on the Action Items page, or on the hyperlink contained in the email notification. The ISP details page is displayed.
- 2 Click the **Signatures/Approval** tab.
- 3 Review the current status of the signature requests. When all requested signatures have been received as GO, you can progress the ISP in the workflow.
- 4 Click **Workflow**.
- 5 Add comments in the Comments section.
- 6 Select the move step forward icon () or the move step back icon () to move the ISP forward or backward in the workflow.

Creating a New Project from an Approved ISP

To create a new project from an approved ISP:

- 1 Open the approved ISP that you would like to create a project from.
- 2 Click **Generate Project**.
- 3 A new project opens with data pre populated from the ISP's Link to NPD tab.
- 4 Make any modifications, then click **Save**.

Viewing an ISP

All ISPs that are not marked as Private can be read by any user. Refer to [Header Section](#) on page 4-4 for more information on the private setting. The ISPs marked as Private can only be read by the ISP administrators, ISP originator, or users with a certain role. Refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information on user roles.

Editing an ISP

Depending on the stage of the workflow, only the ISP administrator, ISP originator, and users with a certain role may edit an ISP. Refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information on user roles.

Deleting an ISP

Depending on the stage of the workflow, only the ISP administrator and users with a certain role can delete an ISP. Refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information on user roles.

Users mentioned above can delete ISPs that are not in the “Approved” stage. Once the ISP has reached the Approved stage, it cannot be deleted.

To delete an ISP:

- 1 Open the ISP to be deleted.
- 2 Click **Admin**, as shown in figure 4-27 below. The ISP Administration dialog box, shown in figure 4-28, is displayed.

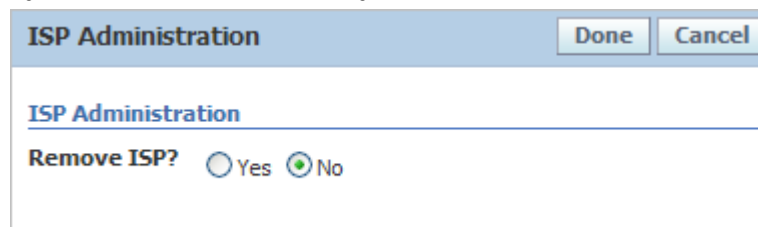
Figure 4-27: Admin button available for approved users



The screenshot shows a web interface for an ISP titled "ISP - Hamburger on Whole Wheat Bun". At the top right, there are three buttons: "Edit", "Workflow", and "Admin". The "Admin" button is circled in red. Below the buttons is a tabbed interface with tabs for "Summary", "Metrics", "Toolbox", "Supporting Documents", "Gate Keeper(s)", and "Signatures / Approval". The "Summary" tab is selected, displaying the following information:

- Originator: **Smith, John**
- Title: **Hamburger on Whole Wheat Bun**
- Description: Test hamburger for happy meals 🌐
- Request Date: 8/31/2007
- Internal Project #: 12345
- Status: Draft
- Administrators: John Smith
- Private: ☐ (Only Project Team may read)

Figure 4-28: ISP Administration dialog box



The screenshot shows a dialog box titled "ISP Administration" with "Done" and "Cancel" buttons. Below the title bar, there is a section titled "ISP Administration" with a question "Remove ISP?" and two radio button options: "Yes" and "No". The "No" option is selected.

- 3 Click **Yes** in the Remove ISP field.
- 4 Click **Done**. The ISP will be deleted from NPD.

Using Projects and Activities

This chapter describes how to use, track, and manage projects and related activities using New Product Development. It includes the following topics:

- ❑ *Projects Overview*
 - ❑ *Activities Overview*
 - ❑ *Activity Types*
 - ❑ *Activity Templates*
 - ❑ *Activities*
 - ❑ *Project Templates*
 - ❑ *Projects*
 - ❑ *Working with Projects*
 - ❑ *Working with Activities*
-

Projects Overview

The Projects feature serves as the primary tool used to track and manage projects toward disposition. Projects follow a stage gate process customized for your company's implementation. A group of team leaders—usually comprised of at least one representative from both Marketing and R&D—manages projects. A project team is defined for each stage in the project's lifecycle. Each stage is comprised of specific activities, some compulsory, which must be completed before the project can move to the next stage. At the end of each stage, the project enters a review process where key decision makers make a GO or NO GO decision.

As each project moves from stage to stage, the project team reaffirms the new product's consumer benefits and attributes. Between each new stage, the team is asked to undertake a screening process (gate), making decisions about the new product's technical and operational feasibility.

Activities Overview

Activities represent individual sub-tasks that can be performed within each stage of the project's lifecycle. Project teams use activities as workflow-enabled tools to more effectively track, manage, and communicate status against these specific deliverables.

Activity Types

Each activity created has an activity type associated with it. This type defines the content structure of the activity. Different activity types may have unique sections that provide functionality that is specific to that type. There are many sections that are common to all activity types. These common sections will be discussed later in this chapter. This section discusses the unique attributes of the activity types.

The available activity types are:

- Document Collaboration
- Document Collaboration with in-place editing
- Project Schedule
- Project Summary

Document Collaboration Activity Type

The document collaboration activity type allows you to attach and review a document, as well as add your comments. The goal of this activity type is to collaborate with a team to come to an approved version of one or more documents. Owners of the activity can attach a document and workflow it to downstream process owners or to a review stage.

A review stage is defined by having users in the Signature Requests table of the current stage on the Routing Requirements tab. During these stages, owners are unable to delete or attach new documents. This protects the integrity of the process by locking the document that is being reviewed. The reviewers are able to add comments directly on the activity or they can edit the document and re-attach it within their signature requests response. This allows for multiple users to edit a document simultaneously and publish their own version back to the activity. Once the final review is complete, the owner can pull the final version of the document from one of the past stages and workflow the activity to its final approved stage.

Figure 5-1 below shows multiple versions of a document associated with each user that uploaded it. “GO” displaying to the right of the review stage indicates that the reviewer has approved this stage of the workflow.

Figure 5-1: Multiple versions on documents

Preliminary Review (Begin 2-Mar-2005 - End 2-Mar-2005)		
David Carter - pro (David Carter- 2-Mar-2005) bernie.PNG (David Carter- 2-Mar-2005)	Tim Reed - Executive (GO - David Carter - 2-Mar-2005) kenny.PNG (David Carter- 2-Mar-2005)	GO 2-Mar-2005
	Sue Dennis - Executive (GO - David Carter - 2-Mar-2005) kenny.PNG (David Carter- 2-Mar-2005)	GO 2-Mar-2005

Every stage in the workflow will maintain a collection of attached documents. This will allow you to view any version that has been attached during the lifecycle of the activity. Documents can only be attached to the Current Attachments/Comments section for the current workflow stage. Previous workflow stages are located in the Historical Attachments/Comments section. Each time an activity is workflowed forward or backward, the current section moves into the historical section. Users with read access to the activity are able to read any of the documents attached to the activity.

Figure 5-2 below shows the Current Attachments/Comments section along with the Historical Attachments/Comments section.

Figure 5-2: Current Attachments/Comments section and Historical Attachments/Comments section

Current Attachments/Comments		
👉 Final review (Begin 1-Aug-2005)		
David Carter - Originator pro (Randal Burrier - 2-Mar-2005) bernie.PNG (David Carter- 2-Mar-2005)	Douglas Scott - Capital Engineering (GO - David Carter - 24-May-2006) Please see attached comments	GO 24-May-2006
Historical Attachments/Comments		
👉 Prep for final review (Begin 2-Mar-2005 - End 1-Aug-2005)		
David Carter -		Completed 1-Aug-2005

Editing a Document

To edit a document and have the changes reflected in the activity:

- 1 Open a document collaboration activity by opening a project that contains one, or if you received a notification email for this activity, click the enclosed link which will take you directly to the activity once you have logged in.
- 2 If there is a document that you would like to edit that was previously attached to this activity, click the linked name of that document. You will be prompted to either open or save the document.
- 3 Click **Open**. The document opens.
- 4 Make the necessary edits to the document.
- 5 Save the document to your local file system and remember the location.
- 6 Close the document.
- 7 Attach the document to the activity by following the procedure below, [Attaching a Document](#). Skip the first step.

Attaching a Document

To attach a document or add comments to an activity that you are the owner or reviewer of:

- 1 Open a document collaboration activity by opening an action item or a project that contains one, or if you received a notification email for this activity, click the enclosed link which will take you directly to the activity once you have logged in.
- 2 If you are the owner or reviewer, click **Add New/Edit** in the Current Attachments/Comments section beneath your name. If you are a reviewer and the **Add New/Edit** button does not exist, click the **Review** link in the right most column. Figure 5-3 shows the Current Attachments/Comments section.

Figure 5-3: Current Attachments/Comments section

Current Attachments/Comments

Request Review (Begin 23-Apr-2007)

Scott Parker - Special Services
This is the required attachment. (David Carter- 29-Nov-2007)

[warehouseauditLabels.xls](#) (David Carter- 29-Nov-2007) [\[Edit\]](#) [Add New/Edit](#) [Open](#)

The file attachment dialog box opens, as shown in figure 5-4 below:

Figure 5-4: File attachment dialog box

Attachments/Comments [Done](#) [Cancel](#)

Comments:
This is the required attachment.

Attach Files
Click **Browse** to select a file and then click the **Attach File** to add the file.
If you do not see a "Browse" button, your browser does not support attachments.

[Browse...](#) [Attach File](#)

***NOTE:** An attached file may not exceed 4MB in size and must **NOT** include !, #, \$, %, *, &, ?, /, + characters.

Attached files	Size	Remove?
warehouseauditLabels.xls	15k	

Pull from Previous Step	Author	Size
<input type="checkbox"/> warehouseauditLabels.xls	Randal Burrier	15k

- 3 To add a document click **Browse** and locate the document on your file system that you would like to attach.
- 4 Click **Attach File**. The file will be displayed in the Attached files section.
- 5 Add any comments in the **Comments** text box.

- 6 To pull a document that is attached to a previous step, select the document by clicking the checkbox next to the document from the Pull From Previous Step section.
- 7 Click **Done** in the upper right corner.

Including Metrics

The document collaboration activity type, like all other types, can contain metrics. Metrics are defined in the activity template. Those metrics defined for a document collaboration activity type can have their values imported by attaching a properly formatted Excel spreadsheet to the activity. For more information on importing metrics, please refer to [Working with Metrics](#) on page 4-15.

Document Collaboration with In-Place Editing Activity Type

Document collaboration with in-place editing behaves similar to the document collaboration activity type. The difference is that document collaboration with in place editing allows you to edit the document and save it directly to the server. You will not need to save the document to your file system and re-attach it as you need to do with the document collaboration activity type. You are able to edit any document that is in the Current Attachment/Comments section that has a status of “Review”. Once users has given their Go or No Go decision, their documents cannot be edited.

Important In-place editing is facilitated by placing a copy of the document on a server where it can be edited directly using Office applications. The copy of the file is named by a unique GUID that takes a form similar to the following example (5657DFE96010-EA60-4661-9FED-C7EC4019E9E2). Because of the difficulty of guessing what the name of a particular document is, the copies on the server are protected implicitly via obscurity. However, they are not protected explicitly via user authentication and authorization. It is due to this limitation that we do not recommend using in-place editing for documents that require a high level of security.










Project Schedule Activity Type

The project schedule activity type helps track high level milestones for a project. Standard global milestones as well as custom milestones can be tracked.

Global Milestones

The global milestones are tracked in the Global Milestones section as illustrated in figure 5-5 below.

Figure 5-5: Global Milestones section

Global Milestones		
Milestone	Est. Date	Comments
Packaging Approval:	11/1/2007	
Stage 2 (Concept Qualification) Begins:	11/15/2007	
Stage 3 (Product Qualification) Begins:	11/22/2007	
Stage 4 (Market Qualification) Begins:	11/29/2007	
Stage 5 (Launch) Begins:	12/6/2007	
In-Market Launch Date:	12/27/2007	
12 wk Post Audit:	3/20/2008	
26 wk Post Audit:	6/26/2008	
52 wk Post Audit:	12/25/2008	

All of these milestone dates can be calculated using offsets from the In-Market Launch Date entered in the Project Milestone Default tab of the corresponding project template. Figure 5-6 below shows an example of this section. Refer to [Project Milestones Defaults Tab](#) on page 5-32 for more information.

Figure 5-6: Global milestones for a project template

Global Milestones		
Critical Milestone	Date Adjust	Display
Packaging Approval	21 Days Before Launch	Pkg Appr
In-Market Launch Date	0	Launch
Stage 1 (Ideation) Begins	90 Days Before Launch	S1Begins
Stage 2 (Concept Qualification) Begins	90 Days Before Launch	S2Begins
Stage 3 (Product Qualification) Begins	90 Days Before Launch	S3Begins
Stage 4 (Market Qualification) Begins	60 Days Before Launch	S4Begins
Stage 5 (Launch) Begins	21 Days Before Launch	S5Begins
12 wk Post Audit	84 Days After Launch	12wk
26 wk Post Audit	182 Days After Launch	26wk
52 wk Post Audit	364 Days After Launch	52wk

Populating Global Milestone Dates

To populate the milestone dates automatically from the default offsets:


- 1 Open a project schedule activity by opening a project that contains one, or if you received a notification email for this activity, click the enclosed link which will take you directly to the activity once you have logged in.
- 2 Click **Edit** in the top right corner to place the activity in edit mode. The select date icon () appears next to the date fields, as figure 5-7 shows below:

Figure 5-7: In-Market Launch Date field in edit mode

- 3 Click the select date icon () for the In-Market Launch Date milestone.
- 4 Select a date in the calendar dialog box that appears. The date chosen will now be populated in the In-Market Launch Date milestone date field.
- 5 Click the linked column header **Est. Date** to calculate the remaining date fields in this section.
- 6 Add necessary comments to each milestone by clicking the set alternate language text icon () in the Comments column.
- 7 Click **Save**.

To manually edit any of the editable milestone dates:

- 1 Open a project schedule activity by opening a project that contains one, or if you received a notification email for this activity, click the enclosed link which will take you directly to the activity once you have logged in.
- 2 Click **Edit** in the top right corner to place the activity in edit mode. The select date icon () appears next to the date fields.
- 3 Click this icon for any of the milestones that you wish to edit.
- 4 Select a date in the calendar dialog box that appears.

Custom Milestones

If you need additional milestones that are not captured in the Global Milestone section, you can create custom milestones, which are user defined. If custom milestones are created on the project template that corresponds to the parent project, then they will automatically appear in this section. Please refer to the [Project Milestones Defaults Tab](#) on page 5-32 for more information about this feature in project templates. Figure 5-8 shows the Custom Milestones section.

Figure 5-8: Custom Milestones section

Custom Milestones					
	Activity/Milestone	Planned	Actual	RAG	Comments
	Code Request	Start <= 4/18/2007 End <= 4/30/2007	Start: 4/28/2007		
	IP Protection	Start <= 6/16/2007 End <= 4/17/2007			
	Legal Assessment	Start <= 6/16/2007 End <= 6/2/2007			

Key fields include:

- **Activity/Milestone**—Contains the name of the activity or milestone.
- **Planned**—Start and end date for this activity. They can be manually entered or derived from the launch date if this milestone was set up on the Custom Milestone section of the project template.














- **Actual**—This is only valid for activity-based milestones. The actual start date is populated with the date of when the corresponding activity is created on the project. The end date is populated with date of when the corresponding activity reaches its terminal workflow step. If multiple instances of these activities exist, these dates are taken from the first activity created.
- **RAG**—The RAG column displays the SLA status of the activity milestone. The actual days are used in the computation.

Adding a Custom Milestone





To add a custom milestone:

- 1 Open a project schedule activity by opening a project that contains one, or if you received a notification email for this activity, click the enclosed link which will take you directly to the activity once you have logged in.
- 2 Click **Edit** in the top right corner to put the activity in edit mode.
- 3 Click **Add New** in the Custom Milestone section. A new row is appended, as shown in figure 5-9 below.

Figure 5-9: New row

Custom Milestones						
	Activity/Milestone	Planned	Actual	RAG	Comments	
	IP Protection 					
  	<input type="text"/>	Start <=  <input type="text"/>  End <=  <input type="text"/> 				
	Legal Assessment 					

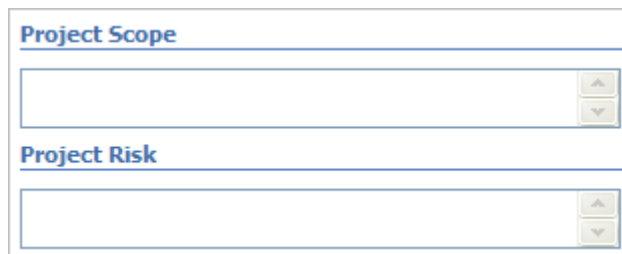
Add New

- 4 To relate this milestone to an activity, click the add data icon () in this row.
- 5 Browse and select the desired activity.
- 6 Click **Done**. The name of the activity will appear in the Activity/Milestone column.
- 7 To enter a custom milestone that is not an activity, enter the name of the milestone in the Activity/Milestone column text area.
- 8 Enter the start and end dates in the Planned column by clicking the select date icon () and selecting the date in the calendar dialog.
- 9 Enter comments in the Comments column by clicking the set alternate language text icon ()
- 10 Click the apply changes icon ()
- 11 Click **Save**.

Project Summary Activity Type

The Project Summary activity type allows you to add scope and risk information for the project, as figure 5-10 shows below.

Figure 5-10: Project Scope and Project Risk sections

The image shows two stacked form sections. The top section is titled 'Project Scope' in blue text. Below the title is a large white text input field with a small vertical scrollbar on the right side. The bottom section is titled 'Project Risk' in blue text. Below the title is another large white text input field with a small vertical scrollbar on the right side.

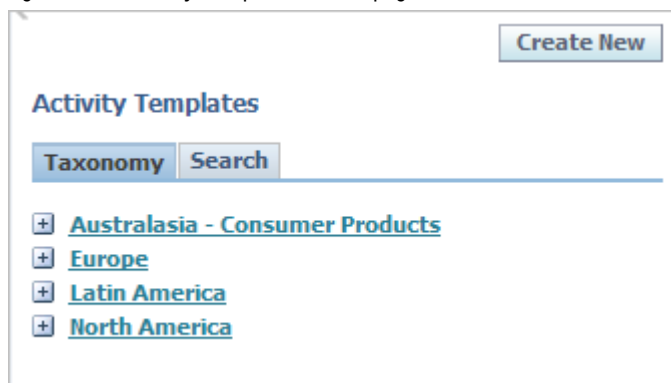
Key fields include:

- **Project Scope**—Contains the scope for this project.
- **Project Risk**—Contains the risk associated with this project.

Activity Templates

Use activity templates to define commonly used activities. To select an activity template, click **Templates > Activity Templates** from the left navigation panel. The Activity Templates search page is displayed, as shown in figure 5-11 below:

Figure 5-11: Activity Templates search page

The image shows a web interface for 'Activity Templates'. At the top right is a 'Create New' button. Below the title 'Activity Templates' are two tabs: 'Taxonomy' (selected) and 'Search'. Under the 'Taxonomy' tab, there is a list of four categories, each with a plus icon and a link: 'Australasia - Consumer Products', 'Europe', 'Latin America', and 'North America'.

Select an activity template using the Taxonomy tab or the Search tab. The Activity Template page, shown in figure 5-12 below, consists of three tabs:

- Summary
- Sub-Activities
- Toolbox

To create a new activity template, click Create New. This procedure is detailed on page 5-57.

Figure 5-12: Activity Template page

Activity Template

[Summary](#)
[Sub-Activities](#)
[Toolbox](#)

Summary Information

Name: 12 Week Post-Audit 
Description: 12 Week Post-Audit 
Template Admin(s): D Carter
Activity Type: Attachment Review/Approval
Business Unit(s): North America
☐ Allow File Attachments

Activity Metrics

Metric	Category	Basis	Phase	Fiscal Year
Annualized Case Volume 	---	No Basis	No Phase	No Fiscal Year

Provide Links To

☒ Trade Item Specifications (GSM)
 ☐ Companies (SCRM)
 ☐ Design Workbench Specifications (DWB)

☐ Process Specifications (GSM)
 ☐ Facilities (SCRM)

☐ Ingredient Specifications (GSM)

☐ Packaging Specifications (GSM)

☐ Printed Packaging Specifications (GSM)

☐ Product Specifications (GSM)

☐ Menu Item Specifications (GSM)

☐ Equipment Specifications (GSM)

Step 1

Status: Draft 
Instructions: Please send forward to begin the workflow process. 
Workflow Options: 2:Complete
Owners: Originator
Additional Readers: Team Leader(s)

Step 2

Status: Complete 
Instructions: Complete 
Workflow Options: << No transitions from terminal step. >>
☒ Terminate workflow at this step
 Unsuccessful Termination

Additional Notifies:

Functional Area	Members	Selection Mode	Guidance

Additional Readers:

☒ all Team Members (for the active Project Stage)
 ☐ all Additional Notification Recipients (for the active Project Stage)

☐ all Team Leaders/Project Readers (for the Project)
 ☐ all NPD Users

☐ all Gatekeepers (for the active Project Stage)
 ☐ respect Parent Activity

Users/Groups (on this Project Team):

Users/Groups:

Event History

Event	User	Date	Comments
Edit	David Carter	9/26/2007 8:57:32 AM	
Edit	Tim Reed	7/24/2007 3:51:45 PM	
Edit	Tim Reed	7/24/2007 3:49:36 PM	
Edit	David Carter	6/29/2007 12:36:00 PM	

Summary Tab

Summary Information Section

This section captures the basic summary information for the activity template.

Figure 5-13: Summary Information section

The screenshot shows a form titled "Summary Information" with the following fields:

- Name:** A text input field.
- Description:** A text input field.
- Template Admin(s):** A dropdown menu showing "David Carter".
- Activity Type:** A dropdown menu.
- Business Unit(s):** A large dropdown menu.
- » clear Business Unit values**: A link to clear the Business Unit values.
- Allow File Attachments**: A checkbox.

Key fields include:

- **Name**—The name of the activity template. This is a required field.
- **Description**—Description of the activity template. This is a required field.
- **Template Admin(s)**—Those users that will have edit access to this template. This is a required field.
- **Activity Type**—The type of activity this template is based on. Additional sections and fields may display on this page based on the activity type you select. This is a required field.
- **Business Unit(s)**—This field creates the relationship between the activity and the business unit. Business units are used when assigning activities to projects or project templates. This is a required field.
- **Allow File Attachments**—Check this check box to add an attachment section to the activity. You can use the Attachments section on an activity to upload files.

Activity Metrics Section

This section, shown in figure 5-14 below, stores the default metrics for the activities based on the template.

Note This section is only visible to users with a certain role. Refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information.

Figure 5-14: Activity Metrics section

Activity Metrics

Metric	Category	Basis	Phase	Fiscal Year	

Add New

Provide Links To Section

Use this section, as shown in figure 5-15 below, to define whether specifications, companies, and facilities can be linked to this activity. You can now link DWB specifications to an activity.

Figure 5-15: Provide Links To section

Provide Links To

☐ Trade Item Specifications (GSM)
☐ Process Specifications (GSM)
☐ Ingredient Specifications (GSM)
☐ Packaging Specifications (GSM)
☐ Printed Packaging Specifications (GSM)
☐ Product Specifications (GSM)
☐ Menu Item Specifications (GSM)
☐ Equipment Specifications (GSM)

☐ Companies (SCRM)
☐ Facilities (SCRM)

☐ Design Workbench Specifications (DWB)
Check this box to link DWB specifications to this activity.

Steps Sections

Use the Steps sections, shown in figure 5-16 below, to define the details of each step of the workflow for this activity.

Figure 5-16: Steps sections

Step 2

Status:

Instructions:

Workflow Options: 1:Draft
☐ Terminate workflow at this step
 Amber In Days / Red In Days

Owners:

Functional Area	Members	Selection Mode	Guidance

☐ Originator

Signature Requests:

Functional Area	Members	Selection Mode	Guidance

☐ Automatically Approve after Red

Additional Notices:

Functional Area	Members	Selection Mode	Guidance

Additional Readers:

☐ all Team Members (for the active Project Stage)
 ☐ all Additional Notification Recipients (for the active Project Stage)

☐ all Team Leaders/Project Readers (for the Project)
 ☐ all NPD Users

☐ all Gatekeepers (for the active Project Stage)
 ☐ respect Parent Activity

Users/Groups (on this Project Team):

Users/Groups:

Key fields include:

- **Status**—The name of the step. This is a required field.
- **Instructions**—Tells the team members what is expected of them for the step. This is a required field.
- **Workflow Options**—Defines what step the owner is allowed to move the activity to within the workflow. This is a required field.
- **Terminate workflow at this step**—Determines if this step is final. If a step is final, the user cannot transition the activity to another step.
- **Amber In Days** and **Red In Days**—Determines when this activity should turn amber or red.
- **Owners**—Defines who can edit and transition this activity. If Originator is checked, the creator of the activity will automatically be added to the table. This is a required field.

- **Signature Request**—These users will be asked to approve this step for the activity.
- **Additional Notices**—These users will be notified via email that the activity has transitioned into this step.
- **Additional Readers**—These users are allowed to view this activity. Use the check boxes to select groups that are already related to the project, or click the linked **Users/Groups (on this Project Team)** field or the **Users/Groups** field to select additional users or groups. Each user defined in the **Users/Groups (on this Project Team)** field must be a member of the project team to read the activity.

Selection Mode—In the Owners, Signature Request and Additional Readers tables, the Selection Mode column contains two check boxes: Allow Change and Set Based on Project. These fields are defined below and are shown in figure 5-17.

- **Allow Change**—When checked, the user creating the activity on the project has the ability to change the members for this row. When not checked the members are locked and the activity must use what was put in place by the template administrator.
- **Set Based on Project**—When checked, the members are automatically populated from the team members designated on the corresponding Functional Area of the project Team Member Formulation Requirements for the current stage.

Figure 5-17: Selection Mode column, Allow Change and Set Based on Project fields

Additional Notices:	Functional Area	Members	Selection Mode	Guidance
<input checked="" type="checkbox"/> <input type="checkbox"/>	Capital Engineering	<input checked="" type="checkbox"/>	<input type="checkbox"/> Allow Change <input type="checkbox"/> Set Based on Project	

Use the following buttons to manage the steps:

- **Add New Step**—Create an additional step in the workflow. When you click **Add New Step**, a new section will be appended to the workflow.
- **Reorder/Remove Steps**—Change the order of the steps as well as delete steps.

Event History Section

The Event History section contains a change history for the activity template. This information is read-only.

Sub-Activities Tab

The Sub-Activities tab lists sub-activities, which are sub-tasks of an activity. You can create a workflow dependency between the two.

To add a sub-activity:

- 1 Click **Add/Update Activities**. A dialog box opens displaying any existing activity templates, as figure 5-18 shows below:

Figure 5-18: Activity dialog box

Activity Name	Dependency

Add / Update Activities

- 2 Click **Add Activity**. A dialog box displays that lists activity templates, as figure 5-19 shows below:

Figure 5-19: Activity template dialog box

Australasia - Consumer Products

Europe

Latin America


North America

- ☐ 12 Week Post-Audit
- ☐ 24 Week Post-Audit
- ☐ 52 Week Post-Audit
- ☐ BL Act Template 22
- ☐ Code Request
- ☐ Concept Screening - v2
- ☐ Concept Screening
- ☐ Customer Review
- ☐ Document Collaboration

- 3 Select the appropriate activity template, then click **Done**. The template you selected displays at the bottom of the Activity Name table, as figure 5-20 shows below:

Figure 5-20: Added activity template

Edit Activities **Done**




Activity Name	Dependency
 <div>Factory Trial Results</div> <div>Use for factory Trials</div>	Activity workflow dependant on this activity?: No Activity must reach: N/A before Parent Activity leaves: N/A Required?: N/A

Add Activity

- 4 Click the edit icon (). The row displays in edit mode.

- 5 Determine if the parent activity's stage requirements are dependent on this sub-activity.
 - a Click **Yes** for the Activity workflow dependent on this activity? question if the sub-activity must reach its selected stage before the parent activity can be transitioned to the selected stage. If **Yes** was selected, describe the dependency by selecting an activity stage in the **Activity must reach** drop-down list and in the **before Parent Activity leaves** drop-down list. The sub-activity must now reach its selected stage before the parent activity can be transitioned to the selected stage given at least one of the following is true:
 - **Yes** is selected for Required?
 - The activity has been created

If **No** is selected for Required?, then the dependency is only enforced if the activity has been created. If **Yes** is selected, then the activity is required and the dependency will be enforced.

Or
 - b Select **No** if the parent activity's stage requirements are not dependent on this sub-activity.
- 6 If more than one activity template exists, you can reorder the templates by selecting the reorder row icons ( ) in the fourth column.
- 7 To apply the changes, click the apply changes icon () in the first column.
- 8 Click **Done** to return to the Activity page.

Toolbox Tab

The Toolbox tab contains uploaded documents that support the current activity. All activities that use this activity template will have access to these documents through the Coaching/Templates tab.

Activities

Create new activities in a project based on saved activity templates. Refer to [Activities Tab](#) on page 5-32 to determine where activities are added. The Activity page consists of the following tabs:

- Summary
- Routing Requirements
- Sub-Activities
- Coaching/Templates
- Signatures/Approval

Summary Tab

Contents of the Summary tab varies based on the selected activity template and type. For more information about activity types, refer to [Activity Types](#) on page 5-2. Figure 5-21 shows one type of activity:

Figure 5-21: Activity dialog box

Customer Review (Customer Review) Save Save & Close Cancel Workflow

Summary Routing Requirements Sub-Activities Coaching/Templates Signatures / Approval

Summary Information
Project: Decorative Screw Closures
Project #: 5001899
Strategic Brief: rgs Eur-S
Updated: 11/29/2007
Activity Name:

Related Documents
[Trade Item Specifications \(GSM\)](#)
[Process Specifications \(GSM\)](#)
[Ingredient Specifications \(GSM\)](#)
[Packaging Specifications \(GSM\)](#)
[Printed Packaging Specifications \(GSM\)](#)
[Product Specifications \(GSM\)](#)
[Menu Item Specifications \(GSM\)](#)
[Equipment Specifications \(GSM\)](#)
[Companies \(SCRM\)](#)
[Facilities \(SCRM\)](#)

Current Attachments/Comments
📌 Draft (Begin 29-Nov-2007)

David Carter - Originator	Add New/Edit	Open
----------------------------------	---------------------------	-------------------

Historical Attachments/Comments
[show document admin >>](#)

The Summary tab includes the Summary Information section and other sections based on the activity type.

Summary Information Section

The Summary Information section, shown in figure 5-22 below, displays data from the project and activity template.

Figure 5-22: Summary Information section


Summary Information

Project: Decorative Screw Closures
Project #: 5001899
Strategic Brief: rgs Eur-S
Updated: 11/29/2007
Activity Name:

Other Sections

As mentioned above, sections on the Summary tab vary based on activity type. Two activities with different Summary tab sections are depicted in figure 5-23 and figure 5-24.

Figure 5-23: Sample Summary page for a customer review activity

Customer Review (Customer Review)		Save	Save & Close	Cancel	Workflow
Summary Routing Requirements Sub-Activities Coaching/Templates Signatures / Approval					
Summary Information					
Project:	Decorative Screw Closures				
Project #:	5001899				
Strategic Brief:	rgs Eur-S				
Updated:	11/29/2007				
Activity Name:	<input type="text" value="Customer Review"/>				
Related Documents					
Trade Item Specifications (GSM) Process Specifications (GSM) Ingredient Specifications (GSM) Packaging Specifications (GSM) Printed Packaging Specifications (GSM) Product Specifications (GSM) Menu Item Specifications (GSM) Equipment Specifications (GSM) Companies (SCRM) Facilities (SCRM)					
Current Attachments/Comments					
 Draft (Begin 29-Nov-2007)					
David Carter - Originator				<input type="button" value="Add New/Edit"/>	
				<input type="button" value="Open"/>	
Historical Attachments/Comments					
show document admin >>					

Related Documents Section

The Related Documents section shows linked GSM and DWB specification types, companies, and facilities as defined in the activity template. Click a link to use a search page to select specifications, companies, or facilities to be associated to this activity.

Current Attachments/Comments Section

Use the Attachment/Comments section to attach files to this activity.

Historical Attachments/Comments Section

This section displays a list of historical attachments and comments.

Figure 5-24: Sample Summary page for an executive summary activity

Exec Summary (Exec Summary)

SaveSave & CloseCancelWorkflow

SummaryRouting RequirementsSub-ActivitiesCoaching/TemplatesSignatures / Approval

Summary Information

Project:

Decorative Screw Closures

Project #:

5001899

Strategic Brief:

rgs Eur-S

Updated:

11/29/2007

Activity Name:

Exec Summary

Project Scope

Project Risk

Attach Files

Attached files	Size	Remove?
There are no attachments		

Browse...

Upload

Upload limit on the file size: 11 MB

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Routing Requirements Tab

The Routing Requirements tab, shown in figure 5-25, displays data from the activity template. For detailed information on the fields in this section, refer to [Activity Templates](#) on page 5-9.

On this page you can make some changes if the selection mode for Allow Change is set to “Yes” on the activity template. You can change the Amber and Red dates and add new owners, signature requests, additional notifies, and additional readers. See [Steps Sections](#) on page 5-13 for more information.

Figure 5-25: Routing Requirements tab, Steps section

Step 4

Status: Final review
Instructions: test
Workflow Options: 5:Complete
☐ Terminate workflow at this step
 Amber In Days / Red In Days

Owners:

Functional Area	Members	Selection Mode	Guidance

Add New

☒ Originator

Signature Requests:

Functional Area	Members	Selection Mode	Guidance
Capital Engineering	Paula Cooper	Allow Change:No Set Based on Project:No	

Add New

☐ Automatically Approve after Red

Additional Notifies:

Functional Area	Members	Selection Mode	Guidance

Add New

Additional Readers:

☐ all Team Members (for the active Project Stage)
☐ all Team Leaders/Project Readers (for the Project)
☐ all Gatekeepers (for the active Project Stage)

☐ all Additional Notification Recipients (for the active Project Stage)
☐ those who have access to Financials (on this Project Team)
☐ all NPD Users
☐ respect Parent Activity

Sub-Activities Tab

Use the Sub-Activities tab to add and manage sub-activities of a project. The transitioning of an activity's workflow can be dependent on one of its sub-activities. Refer to the [Activities Tab \(Stage-Specific\)](#) on page 5-43 for more information about how activities and sub-activities impact projects. Figure 5-26 shows sub-activity sections.

Figure 5-26: Sub-activities sections

The figure displays three identical UI sections for managing sub-activities, each with a title, a table, and an action button.

Activities (from Project Templates)

Activity Name	Description	Owner	Status

Add / Update Activities

Activities (from Library)

Activity Name	Description	Owner	Status

Add / Update Activities

Activities (for this Project only)

Activity Name	Description	Owner	Status

Add / Update Activities

Coaching/Templates Tab

The Coaching/Templates tab contains documents that support the current activity. These documents are uploaded to the activity template.

Toolbox Section

The Toolbox section on the Coaching/Templates tab is read-only. The attachments in this section are imported from the activity template.

Signature/Approval Tab

Use the Signatures/Approval tab to view the workflow step that the activity is in, as well as the workflow event history.

Current Status Section

The Current Status section shows the current status of the stage, including owner, status, desired action, and Start, Amber, and Red Dates.

Figure 5-27: Current Status section

Current Status	
Current Owner:	Tim Jones; Pamela Carter
Current Status:	Stage 2 - Concept Qualification
Desired Action:	
Start Date:	5/11/2006
Amber Date:	-----
Red Date:	-----

Global Checklist Item Section

The Global Checklist Item section displays details about the activity's approvals for each of the current and past stages.

Figure 5-28: Global Checklist Items section

Global Checklist Items		
Global Checklist Items	Online Tools	Current Status
Screening Approvals	The System will automatically request appropriate signatures based on business case.	

Event History Section

The Event History section shows a list of workflow actions taken for this activity. This information is system-generated and cannot be changed.

Project Templates

Use project templates to define the mechanics and business rules to be used within your business unit's New Product Development process. Each project template declares team member formulation requirements (TMFR) and milestones that will appear at each stage of the project lifecycle. These requirements and items are present in all projects and are in addition to any custom team member formulation requirements and milestones that you define within your individual project. The content of project templates varies based on project scope (business unit and project type).

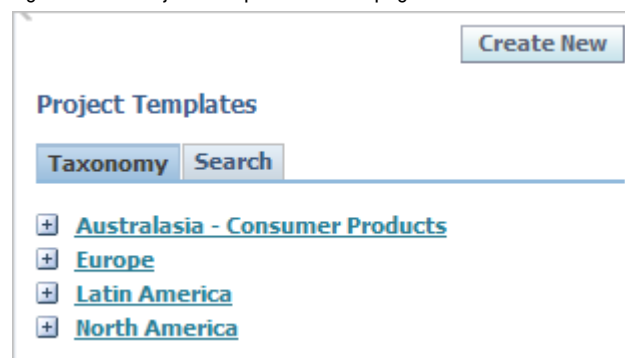
Within each project template, define two key elements for each stage of the NPD process, as shown in table 5-1:

Table 5-1: Project template key elements

Element	Description
Team Member Formulation Requirements	Business rules for project team membership and document/project review and approval
Key Milestones	Default milestones and corresponding schedule to be tracked and managed within the project lifecycle

To choose a project template, select **Templates > Project Templates** from the left navigation panel. The Project Templates search page displays, as figure 5-29 shows below:

Figure 5-29: Project Templates search page



Select a template using the Taxonomy tab or the Search tab. Figure 5-30 below shows the Project Template page.

Figure 5-30: Project Template page

Project Template

Summary Information

Title:

Template Admin(s):

Project Reader(s):

Business Unit(s):

[» clear Business Unit values](#)

Project Type(s):

[» clear Project Type values](#)

Starting Stage:

Requires Strategic Brief: ☒

Project Metrics

Metric	Category	Basis	Phase	Fiscal Year

Event History

Event	User	Date	Comments

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This page consists of the following tabs:


- Summary
- Project Team
- Stage Documents
- Toolbox
- Activities
- Project Milestone Defaults

Summary Tab

Summary Information Section

Use this section, shown in figure 5-31 below, to define the rules and users for a template.

Figure 5-31: Summary Information section

Summary Information	
Title:	Short Project Template 
Template Admin(s):	Tim Reed
Project Reader(s):	NPD SARReader
Business Unit(s):	Europe » Foodservice Europe
Project Type(s):	New Brand » New to the World Product Category (not seen before) » New Product & Package Current Brand » Existing Product Category (for This Business Unit) » New Product New Brand » New to the World Product Category (not seen before) » New Product
Starting Stage:	Stage 1 - Ideation
Requires Strategic Brief:	<input type="checkbox"/>

Key fields include:

- **Title**—Title of the template. This is a required field.
- **Template Admin(s)**—Users that can modify the template. This is a required field.
- **Project Reader(s)**—If the Private flag is checked, only the project team can access the project. Users assigned as project readers are considered part of the project team and will have read access.
- **Business Unit(s)**—Defines the business units that this template is associated with. When creating a project, this field along with Project Type is used to determine which templates to use. This is a required field.
- **Project Type(s)**—Defines the project type that this template is associated with. When a project is created, this field along with the Business Unit(s) field determines which templates are used.
- **Starting Stage**—Stage the project will start from. This is a required field.
- **Requires Strategic Brief**—Indicates whether the project requires a strategic brief. This is a required field.

Project Metrics Section

Refer to [Metrics Tab](#) on page 5-37 for more information on the Project Metrics section.

Event History Section

The Event History section contains a change history for the project template. This information is read-only.

Project Team Tab

Use team member formulation requirements (TMFR) to define business rules for project team membership and document/project review and approval. Team leaders use the project template form to administer the TMFR “rule base”. This TMFR “rule base” is applied when user categorizes a new strategic brief or project. The resulting team member requirements are used as a template to define specific team member, gatekeeper, and notification requirements within each project stage. Table 5-2 below shows team member requirements.

Table 5-2: Team member requirements

Attribute	Description
Team Members	For each functional area, one or more team members can participate in each stage of the project
Gatekeepers	For each functional area, one or more gatekeepers whose signature will be required to progress the project to the next stage
Additional Notification Requirements	For each functional area, one or more members of the organization who must be notified when a project reaches the next stage of the NPD process

In a project’s beginning stage, when you identify requirements for team members, gatekeepers, and additional notification within each project stage, often times you will not be able to define specific individuals to fill these roles. You can simply select **Required** to indicate that the team leader must identify an individual to fill this role when the project reaches this stage.

Use the Project Team tab, shown in figure 5-32, for assigning team members.

Figure 5-32: Project Team tab

Project Template

Summary **Project Team** Stage Documents Toolbox Activities Project Milestone Defaults

ISP Screening Requirements

Functional Area	Gate Keeper(s)	Additional Notification	Guidance
Capital Engineering	Beth Daniel Required	Tim Reed Required	
Channel Marketing/Sales	Lisa Gonzales		

Amber In 1 Day(s) \ Red In 2 Day(s)
☒ Automatically Approve after Red

STAGE 1 Project Stage - Gate Requirements

Functional Area	Team Member(s)	Gate Keeper(s)	Additional Notification	Guidance
Channel Marketing/Sales	Paul Davis Required	Jill Smith Required	Joseph Perez Required	

Amber In 1 Day(s) \ Red In 2 Day(s)
Accelerate "No-Go" reviews on Projects and Activities by: 50%
☒ Automatically Approve after Red

STAGE 2 Project Stage - Gate Requirements

Functional Area	Team Member(s)	Gate Keeper(s)	Additional Notification	Guidance
Channel Marketing/Sales	Paul Davis Required	Jill Smith Required	Joseph Perez Required	

Amber In 1 Day(s) \ Red In 2 Day(s)
Accelerate "No-Go" reviews on Projects and Activities by: 10%
☒ Automatically Approve after Red

STAGE 3 Project Stage - Gate Requirements

Functional Area	Team Member(s)	Gate Keeper(s)	Additional Notification	Guidance
Channel Marketing/Sales	Paul Davis Required	Jill Smith Required	Joseph Perez Required	

Amber In 1 Day(s) \ Red In 2 Day(s)
Accelerate "No-Go" reviews on Projects and Activities by: No Acceleration
☒ Automatically Approve after Red

STAGE 4 Project Stage - Gate Requirements

Functional Area	Team Member(s)	Gate Keeper(s)	Additional Notification	Guidance
Channel Marketing/Sales	Paul Davis Required	Jill Smith Required	Joseph Perez Required	

Amber In 1 Day(s) \ Red In 2 Day(s)
Accelerate "No-Go" reviews on Projects and Activities by: 50%
☒ Automatically Approve after Red

STAGE 5 Project Stage - Gate Requirements

Functional Area	Team Member(s)	Gate Keeper(s)	Additional Notification	Guidance
Channel Marketing/Sales	Paul Davis Required	Jill Smith Required	Joseph Perez Required	

Amber In 1 Day(s) \ Red In 2 Day(s)
Accelerate "No-Go" reviews on Projects and Activities by: No Acceleration
☐ Automatically Approve after Red



Key fields for each stage include:

- **Functional Area**—The functional area that the rest of the data in the row refers to.
- **Team Members**—The project or strategic brief will appear in these members' Action Items.
- **Gate Keepers**—These members will be required to sign off on the project stage before it is allowed to proceed.
- **Additional Notifications**—These members will be notified via email as the project or strategic brief changes stages in the workflow.
- **Required**—This checkbox is available for team members, gatekeepers, and additional notifications. It indicates one member must be defined in the corresponding column when used in the project or strategic brief.
- **Guidance**—This is a text field in which you can provide guidance to the members of that functional area.
- The Green/Amber/Red status indicator on the NPD Signature Requests section of the Action Items page is controlled by the following attributes:
 - **Amber In**—The Status indicator will turn Amber this many days after the Start Date.
 - **Red In**—The Status indicator will turn Red this many days after the Start Date.
 - **Automatically Approve after Red**—When checked, this option will cause any signature requests to automatically approve when they turn red.

ISP Screening Requirements Section

This section, shown in figure 5-33 below, shows the TMFR that will be used within an ISP once the ISP is transitioned to the Draft Review stage and the administrator assigns the business units and project type associated with this template. Entries appear on the ISP once the administrator selects the business unit and project type and clicks **Save**.

Figure 5-33: ISP Screening Requirements section

ISP Screening Requirements			
Functional Area	Gate Keeper(s)	Additional Notification	Guidance
Capital Engineering	Paula Cooper Required	Tim Reed Required	
Channel Marketing/Sales	Lisa Gonzales		

Amber In 1 Day(s) \ Red In 2 Day(s)

☒ Automatically Approve after Red

Project Stage - Gate Requirements Section

This section defines the TMFR data for each associated stage.

Figure 5-34: Project Stage - Gate Requirements section

STAGE 1 Project Stage - Gate Requirements				
Functional Area	Team Member(s)	Gate Keeper(s)	Additional Notification	Guidance
Capital Engineering	Tim Reed Required			
Channel Marketing/Sales	Paula Cooper Research Development Lisa Gonzales Required	Mark Lawson Required	Beth Hall Required	

Amber In 1 Day(s) \ Red In 2 Day(s)
Accelerate "No-Go" reviews on Projects and Activities by: 50%
☒ Automatically Approve after Red

Stage Documents Tab

The Stage Documents tab, shown in figure 5-35 below, lists stage and strategic brief questions related to each stage of the project. This tab may not display based on your configuration settings.

Figure 5-35: Stage Documents tab

Project Template

Summary Project Team **Stage Documents** Toolbox Activities Project Milestone Defaults

Stage 1

Stage Document: Charter Gate Document

- Commercial Case/Business Opportunity
 - Provide a preliminary financial evaluation
 - Number of SKUs (if known), Incremental SKUs (if known)
- Project Idea
 - Basic Project Idea and Description
- Project Classification
 - Consumer technology matrix: platform, derivative, variant
- Research and Development
 - Describe (development of product stimulus which explores key attributes needs, first prototypes, refine and finalize prototypes)
- Customer/Trade Issues and Launch Support Plan
 - Trade assessment with the Sales Force (state how the product will add value for the trade)
- Sourcing and Supply Chain
 - Sourcing /manufacturing and supply chain (if known)
- Project Justification
 - Business strategy (fits with company and /or category strategy, including regional and/or international exploitation)
 - Competitive Consideration
 - Consumer need and initial evidence of consumer merit ("Lite" concept consumer screening – uniqueness, intention to buy (unpriced), CSI score)
- Resource Utilization
 - Describe Resource Utilization (High, Medium or Low)
- Capital Requirement
 - For Pilot Plant Work (or) and Manufacturing Equipment
- Marketing Execution
 - Market research/consumer testing – plan and results (if available)
 - Initiate Marketing Mix, including: branding, advertising refine, positioning, model price range, packaging design, target listings etc., as appropriate
- Risk Consideration
 - Risk Consideration (see "Quick Risk Analysis" document)
- Project Objectives
 - Objectives and critical success factors (including benchmarks and action standard and full market potential)
 - Key project milestones

Stage 2

Stage Document: Global Stage 2 Document

Toolbox Tab

The Toolbox tab contains a checklist of items needed for the corresponding stage of the project. Any high-level activities with their corresponding supporting documents, such as Excel spreadsheets or Word documents, should be added to the appropriate stage. Add checklist items by clicking **Add New**, and remove or reorder items by clicking **Reorder/Remove**.

Figure 5-36: Stage toolbox

STAGE 1 Toolbox

Objective	Documents

Add New Reorder/Remove

Activities Tab

Use the Activities tab to define the default activities for each stage for a project. Additional activities can be added on the project. For more detail, see the [Activities Tab \(Stage-Specific\)](#) on page 5-43.

Project Milestones Defaults Tab

Project milestones define significant points in a project's lifecycle that can be tracked and managed. Within each project template, you can define any number of discreet milestones, along with a corresponding timeline expressed in days relative to the product launch date. This "default" timeline is used to assist team leaders in defining a project schedule and can be adjusted when each project is created.

Global Milestones Section

Global milestones are out-of-the-box milestones that are managed in the Global Milestone section of a project's project schedule activity. You can enter the number of days before or after the In-Market Launch Date for the milestone date. Figure 5-37 shows the Global Milestones section.

Figure 5-37: Global Milestones section

Global Milestones		
Critical Milestone	Date Adjust	Display
Packaging Approval	21 Days Before Launch	Pkg Appr
In-Market Launch Date	0	Launch
Stage 1 (Ideation) Begins	90 Days Before Launch	S1Begins
Stage 2 (Concept Qualification) Begins	90 Days Before Launch	S2Begins
Stage 3 (Product Qualification) Begins	90 Days Before Launch	S3Begins
Stage 4 (Market Qualification) Begins	60 Days Before Launch	S4Begins
Stage 5 (Launch) Begins	21 Days Before Launch	S5Begins
12 wk Post Audit	84 Days After Launch	12wk
26 wk Post Audit	182 Days After Launch	26wk
52 wk Post Audit	364 Days After Launch	52wk

Key fields include:

- **Date Adjust**—Represents the offset prior to the launch date that the corresponding milestone will be set to.

Custom Milestones Section

Custom milestones can be created for each project template. You can enter a name for the milestone or you can select a project activity as the name. You can enter the start and end date in relation to the project launch date. These dates are tracked and displayed on the Custom Milestone section of the project's project schedule activity, as figure 5-38 shows below.

Figure 5-38: Custom Milestones section, edit mode

Custom Milestones				
	Critical Milestone	Start Date Adjust	End Date Adjust	
✓ ↺ +	<input type="text"/>	<input type="text"/> Days Before Launch ▾	<input type="text"/> Days Before Launch ▾	✗

Key fields include:

- **Critical Milestone**—Displays the name of the milestone.
- **Start Date Adjust**—The number of days before or after launch that this milestone's start date will be set to.
- **End Date Adjust**—The number of days before or after launch that this milestone's end date will be set to.

Projects

Select existing projects by clicking **New Product Development > Projects** from the left navigation panel. Agile PLM for Process displays the Projects search page, as shown in figure 5-39 below. Search for and select a project. You can also access projects through your Action Items page, or through email notifications sent to you.

Figure 5-39: Projects search page

The screenshot shows the 'Projects' search interface. At the top right is a 'Create New' button. Below it is the 'Projects' title. The 'Search Criteria' section includes a dropdown menu with 'Title' selected, a 'Contains' operator dropdown, an empty search input field, and a 'more' link. Below the search field are links for 'criteria...' and 'additional attributes...'. The bottom of the search section contains 'Search', 'Reset', 'Save Search', and 'Load Search' buttons. The 'Search Results' section at the bottom has a 'Results Per Page' dropdown set to '10'.

In a project, some of the tabs along the top of the Project page will be stage specific, meaning the name and contents will vary depending on what stage the project is in. The tabs that will not change are Summary, Metrics, Supporting Documents, and Signature/Approval. Refer to figure 5-40 below.

You can create new projects using the **Create New** button. For detailed instructions, see [Creating a Project](#) on page 5-46.

Figure 5-40: Project page

NPD - (Stage 1)

Summary Metrics **S1 Project Team** S1 Ideation S1 Activities S1 Toolbox Supporting Documents Signatures / Approval

Summary Information

Title:

Project #: 5002596

Internal Project #:

Status: Stage 1 - Ideation

Description:

Strategic Brief: [» clear Strategic Brief](#)

Other Strategic Briefs:

Project Type: New Brand » New Product Category (for Company) » New Menu Item

Business Unit(s): North America [» clear Business Unit values](#)

Brands:

Demographics:

Channels:

Global Categories:

Enabling Technology: ---

Consumer Value Perception: ---

Project Visibility:

Lead Countries:

Team Leader(s): David Carter

Project Owner: David Carter

Project Reader(s):

Private: ☐ (Only Project Team may read)

Extended Attributes

Extended Attributes	Notes

[Add New](#)

Current Project Status

Ideation	Concept Qualification	Product Qualification	Market Qualification	Launch
Stage 1	Stage 2	Stage 3	Stage 4	Stage 5
Started David Carter 12/4/2007				

The name of this tab matches the current stage in the project. As the project progresses, the tab name will change automatically.

Current status

Summary Tab

Use the Summary tab to provide high level information about the project.

Summary Information Section

Key fields in the Summary Information section include:

- **Project Title**—Enter the name of the project. The name must conform to the naming convention established and is limited to 50 characters. This is a required field.
- **Project Number**—The project number is auto-generated and cannot be changed.
- **Status**—Status will be assigned by the system according to the project's progression through the NPD process.
- **Strategic Brief**—Displays the name of the parent strategic brief. Click on this field to navigate to the parent strategic brief.
- **Project Type** and **Business Unit(s)**—These fields determine which project template(s) are used to create the project.
- **Owner**—The owner is defaulted to the author of the project. Owners can transition the project once all the approvers have given their approvals.
- **Team Leaders**—This field defaults to the author of the project. Team leaders can transition the project once all the approvers have given their approvals.
- **Project Readers**—If the **Private** flag is checked, only team members can access the project. Those user assigned as project readers are considered part of the project team and will have read access.
- **Private**—All projects are available to all NPD users by default. When the private flag is checked, only team members will have access.

Extended Attributes Section

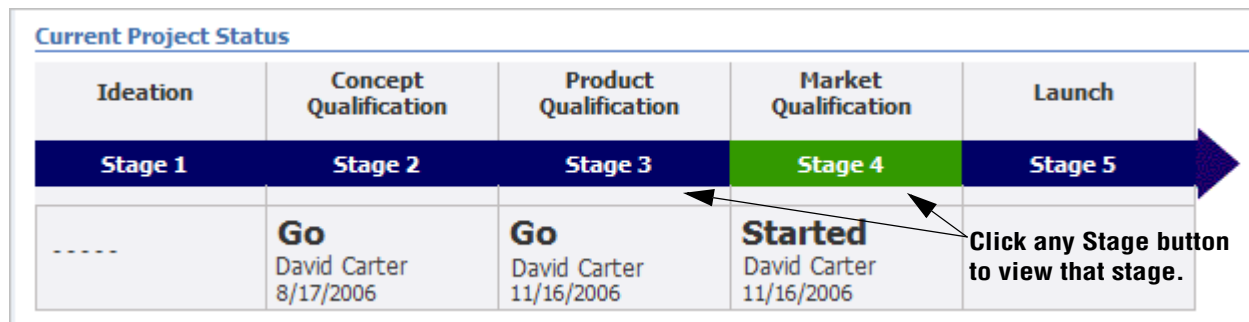
Use this section to add extended attributes for the project. Extended attributes define custom information for the project. Refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for a more in-depth discussion of extended attributes.

Current Project Status Section

The Current Project Status status bar plays a dual role:

- 1 It provides the user a graphical representation of the project's current status and its progression through the NPD process stages.
- 2 It provides an interface that you can use to navigate across stages to access the stage-specific pages and items. Each stage name is actually a button. Clicking on any of the buttons will take you to the corresponding stage in the process. Any time you wish to view information across stages within a project, you must do so via the Current Project Status section of the project Summary tab.

Figure 5-41: Current Project Status section



Metrics Tab

This tab contains the default metrics defined in the project template. Use it to add more metrics by clicking **Setup Metrics**. The metrics displayed also contain a rollout of the metrics associated to the project's activities.

Note This tab is only visible to users with a certain role. For more information, refer to the *Agile Product Lifecycle Management for Process Administrator User Guide*.

Figure 5-42: Metrics tab

NPD - (Stage 1)

Summary

Metrics

S1 Project Team










S1 Ideation

S1 Activities

S1 Toolbox

Supporting Documents

Project Metrics

Metric	Category	Basis	Phase	UOM	No Fiscal Year
3 YR NPV 	---	No Basis	No Phase	actual	---
Annualized Case Volume 	---	No Basis	No Phase	actual	---
Annualized DI 	Revenue	No Basis	No Phase	actual	---
Annualized NSV 	Revenue	No Basis	No Phase	actual	---
Capital Exp 	---	No Basis	No Phase	actual	---
Contribution 	Expense	No Basis	No Phase	actual	---
Months to Payout 	---	No Basis	No Phase	mos	---
Remaining Cost 	---	No Basis	No Phase	actual	---
Remaining Work (Hrs) 	---	No Basis	No Phase	hr	---

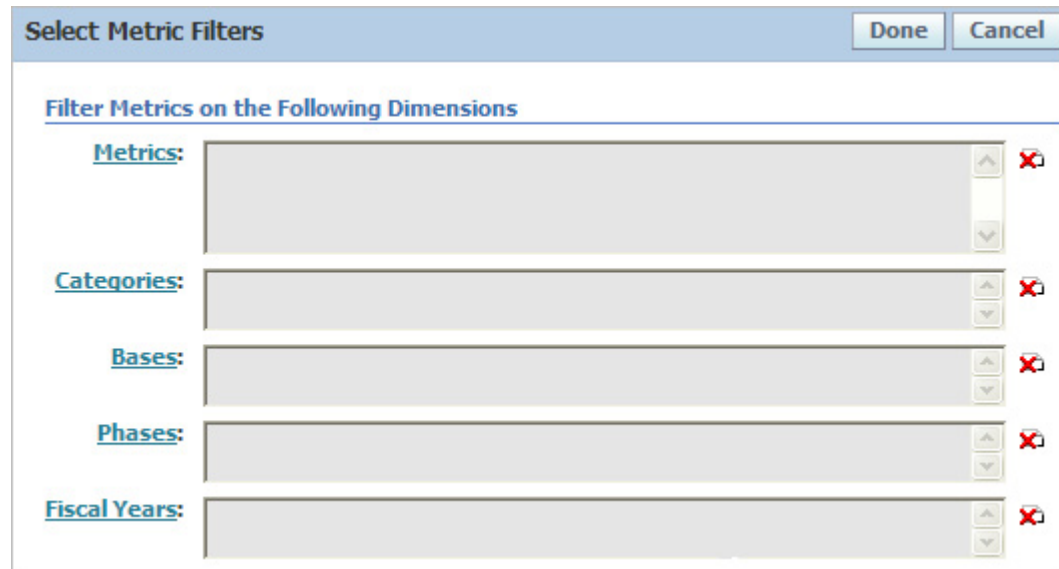
Setup Metrics

Display Filters

NOTE: Financial metrics shown in [FY 2005] currency exchange rates for [USD].

To filter the list of metrics displayed, click the **Display Filter** link. A dialog box, shown in figure 5-43 below, opens.

Figure 5-43: Select Metric Filters dialog box

The dialog box is titled "Select Metric Filters" and has "Done" and "Cancel" buttons in the top right corner. Below the title bar, there is a section header "Filter Metrics on the Following Dimensions". Under this header, there are five rows, each representing a dimension: "Metrics:", "Categories:", "Bases:", "Phases:", and "Fiscal Years:". Each row consists of a text label, a large empty rectangular box for selection, a small vertical scroll bar on the right side of the box, and a red "X" icon to the right of the scroll bar.

Click the field names to select filter criteria, then click **Done**.

Adding Metrics

To add new metrics:

- 1 With the project in edit mode, select **Setup Metrics**.
- 2 Click **Add New**.
- 3 In the search dialog that displays, search and select the metrics you want to add.
- 4 Click **Done**.

Supporting Documents Tab

Use the Supporting Documents tab to store documents for a project. The Supporting Documents tab consists of three sections, and is shown in figure 5-44 below:

- Supporting Documents (attached to Project)
- DRL Documents
- Related Documents (from other Prodika applications)

Figure 5-44: Supporting Documents tab

[Edit](#) [POP](#) [Print](#) [Workflow](#) [Admin](#)

NPD - Sunny Days - Frozen Snack (Stage 2)

[Summary](#) [Metrics](#) [S2 Project Team](#) [S2 Concept Qualification](#) [S2 Activities](#) [S2 Toolbox](#) [Supporting Documents](#)

Supporting Documents (attached to Project)

Last Modified	Documents	Type	Owners	Status
11/19/2007	Test Doc Collab w/ in-place editing	Activity	John Adams	Draft
11/6/2007	Project Schedule	Activity	-----	Approved
11/5/2007	Test Doc Collab w/ in-place editing	Activity	David Carter	Draft
9/27/2007	Document Collaboration	Activity	David Carter	Draft
9/25/2007	Project Fina Worksheet	Activity	Tim Reed	Draft
6/4/2007	PPT	Attachments/Comments	-----	-----

DRL Documents

Name	Type

Related Documents (from other Prodika applications)

Last Modified	Documents	Type	Owners	Status
11/13/2007	Sweet Water, 2% (5077456-001)	Process Specification	-----	Developmental
5/15/2007	ABales T (5084146-001)	Trade Item Specification	-----	-----
10/25/2005	Blanched Navy Beans - 54% Moisture (5077588-001)	Process Specification	-----	Draft (Review)

Supporting Documents (attached to Project) Section

The Supporting Document (attached to Project) section shows documents, activities, and ISPs that are tied to the project. The Type column indicates the type of document. Clicking any linked field displays that document.

DRL Documents Section

Use the DRL Documents section to reference documents or catalogs of documents stored in the Document Reference Library (DRL). The catalogs listed here are associated to the project.

The association between a document and its catalog is set in DRL and controls visibility and access to the document. Document visibility for a user is controlled by the user's association to a catalog node set in the User Group Management tool. For more information, refer to the *Agile Product Lifecycle Management for Process Document Reference Library User Guide* and the *Agile Product Lifecycle Management for Process Administrator User Guide*.

Related Documents (from other Prodika applications) Section

The Related Documents (from other Prodika Applications) section shows all Global Specification Management (GSM) and Design Workbench (DWB) specifications that are related to the current project through its activities.

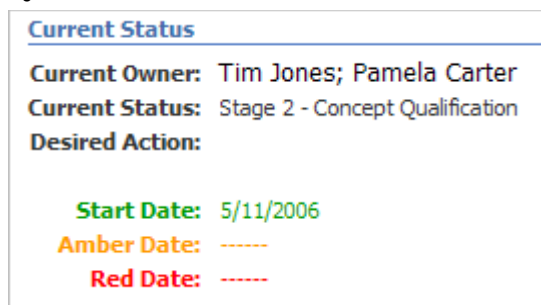
Signatures/Approval Tab

Use the Signatures/Approval tab to view the workflow step that the project is in, as well as workflow event history.

Current Status Section

The Current Status section shows the current status of the stage, including owner, status, desired action, and start, amber and red dates.

Figure 5-45: Current Status section



The screenshot shows a box titled "Current Status" with the following information:

Current Owner:	Tim Jones; Pamela Carter
Current Status:	Stage 2 - Concept Qualification
Desired Action:	
Start Date:	5/11/2006
Amber Date:	-----
Red Date:	-----

Key fields include:

- **Current Owner**—Owners and team leader as defined on the Summary tab.
- **Start, Amber, and Red Dates**—Control the status of the action item.

Global Checklist Item Section

The Global Checklist Item section displays details about the project's approvals for each of the current and past stages.

Figure 5-46: Global Checklist Items section

Global Checklist Items		
Global Checklist Items	Online Tools	Current Status
Screening Approvals	The System will automatically request appropriate signatures based on business case.	

Event History Section

The Event History section shows a list of workflow actions taken for this project. The actions are system-generated and cannot be changed.

Project Team Tab (Stage-Specific)

The Project Team tab, shown in figure 5-47 below, is stage-specific in that the team membership may vary depending on which stage the project is in. This flexibility ensures that the team has access to the right resources and skill set at each stage.

Figure 5-47: Project Team tab

NPD - (Stage 1)

[Summary](#)
[Metrics](#)
[S1 Project Team](#)
[S1 Ideation](#)
[S1 Activities](#)
[S1 Toolbox](#)
[Supporting Documents](#)

Team Member Formulation Requirements (from Project Template)

Functional Area	Team Member(s)	Gate Keeper(s)	Additional Notification	Guidance
Marketing	Frank Brown Required	Sarah Jones Required	Lisa Gonzales Required	
R&D Product Development		Tim Reed Required		

Add/Update Team Members

Additional Team Member Formulation Requirements

Functional Area	Team Member(s)	Gate Keeper(s)	Additional Notification

Add/Update Team Members

Current Project Status

Ideation	Concept Qualification	Product Qualification	Market Qualification	Launch
Stage 1	Stage 2	Stage 3	Stage 4	Stage 5
Started David Carter 12/4/2007				

Each project team page includes two sections: Team Member Formulation Requirements (from Project Template) and Additional Team Member Formulation Requirements.

Both sections are handled in a similar manner but with some exceptions:

- The Team Member Formulation Requirements (from Project Template) section may be pre-populated based on the selections made in the applicable project template.
- The Team Member Formulation Requirements (from Project Template) section contains a Guidance column that the Additional Team Member Formulation Requirements section does not have.

Refer to [Current Project Status Section](#) on page 5-36 for information on the Current Project Status section.

Activities Tab (Stage-Specific)

The Activities tab is stage-specific and is used to manage activities for the project. For a detailed description of using activities, refer to [Activities Overview](#) on page 5-1. Figure 5-48 below shows the Activities tab.

Figure 5-48: Activities tab

NPD - (Stage 1)

Summary Metrics **S1 Project Team** S1 Ideation **S1 Activities** S1 Toolbox Supporting Documents

Activities (from Project Templates)

Activity Name	Description	Owner	Status
Idea Capture Idea Capture			
New Idea Screening Matrix New Idea Screening Matrix			
Project Schedule Project Schedule			
Pre-Screening Meeting Minutes Pre-Screening Meeting Minutes			

S1 indicates stage 1 of the project

Add / Update Activities

Activities (from Library)

Activity Name	Description	Owner	Status

Add / Update Activities

Activities (for this Project only)

Activity Name	Description	Owner	Status

Add / Update Activities

Global Checklist Items

Global Checklist Items	Online Tools	Current Status
Project Approval	The System will automatically request appropriate signatures based on business case.	

Current Project Status

Ideation	Concept Qualification	Product Qualification	Market Qualification	Launch
Stage 1	Stage 2	Stage 3	Stage 4	Stage 5
Started David Carter 12/4/2007				

Activities (from Project Template) Section

The Activities (from Project Templates) section displays activity templates defined on the project template.

Activities (from Library) Section

Use the Activities (from Library) section to add an activity template that has already been defined.

Activities (for this Project only) Section

Use the Activities (for this Project only) section to create custom activity templates that are only accessible by the current project.

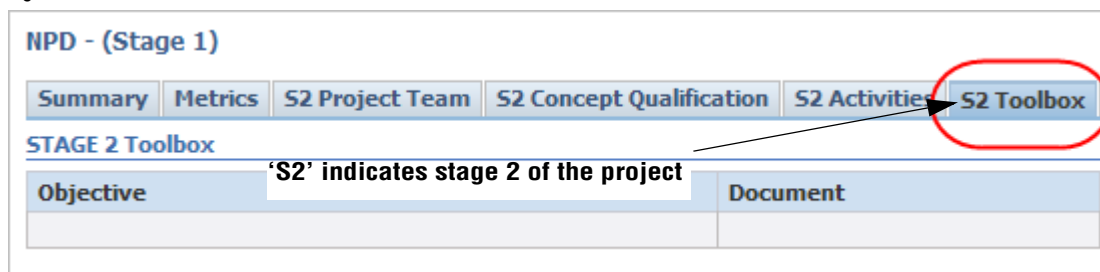
For all sections, key fields include:

- **Activity Name**—The name of the activity template that has been associated to the project.
- **Description**—Contains activities that has been added to the project. You can add activities by clicking the **Create New** link.
- **Owner**—The current owner as set by the activity's workflow.
- **Status**—The activity's Green, Amber, or Red workflow status. The dates for these statuses are shown on the Signature /Approval tab.

Toolbox Tab (Stage-Specific)

The Toolbox tab is a stage-specific, dynamically changing tab label. Its contents reflect the stage the product is in during the lifecycle. It contains a checklist of high level activities with any supporting documents for the current stage of the project. The checklist is created on the project template. Figure 5-49 shows the Toolbox tab.

Figure 5-49: Toolbox tab



Working with Projects

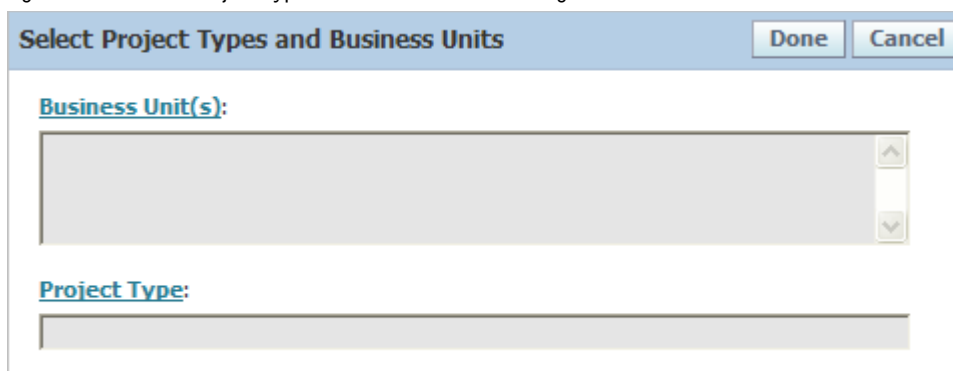
Creating a Project

Create an NPD project either from the left navigation panel or from within a strategic brief. The strategic brief document will serve as the foundational parent document of the new project. Projects are defined by business unit and project type.

To create a new project from the navigation panel:

- 1 Click **New Product Development > Projects** from the left navigation panel. Agile PLM for Process displays the Projects search page.
- 2 Click **Create New**. The Select Project Types and Business Units page dialog box, as figure 5-50 shows below:

Figure 5-50: Select Project Types and Business Units dialog box



- 3 Click the **Business Unit(s)** link to select one or more business units associated with the project. This is a required field.
- 4 Click the **Project Type** link to select a project type. This is a required field.
- 5 Click **Done**. NPD assigns a project template based on your selection. A new project page displays, with some fields and tabs pre-defined based on the associated template.
- 6 On the Summary tab, provide a title for the project in the Title field. This is a required field.
- 7 Click **Save**.
- 8 Provide additional project information on the remaining pages, then click **Save**.



To create a project from a strategic brief:

- 1 Click **New Product Development > Strategic Briefs**.
- 2 Navigate through the strategic briefs taxonomy or use the search function to find the completed strategic brief to use as the parent for the project.
- 3 Click on the desired strategic brief link to open the document.
- 4 Click **Create Project**.

Approving a Project

The gatekeepers of a project will have an action in the NPD Signature Requests on their Action Items page when an approval is requested from them. They will also receive an email notifying them that their signature has been requested.


To approve or reject a project:

- 1 Click on the selected project action item, or on the hyperlink contained in the email notification.
- 2 Review contents of the project by clicking the **Click HERE to review the original Project** link. This launches the project.
- 3 Close the Project window by clicking **Done**.
- 4 Click **Workflow**.
- 5 Add comments in the Comments field.
- 6 Select **GO** or **NO GO**, then click the move step forward icon () or the move step back icon () to submit your decision.

Moving a Project to the Next Step in the Workflow

Once all the approvers have approved the project and all the activity dependencies have been satisfied, the project is ready to be transitioned to the next step in the workflow.

To move the project to the next step in the workflow:

- 1 Open the project.
- 2 Click **Workflow**.
- 3 Add comments in the Comments field.
- 4 Select the move step forward icon ().

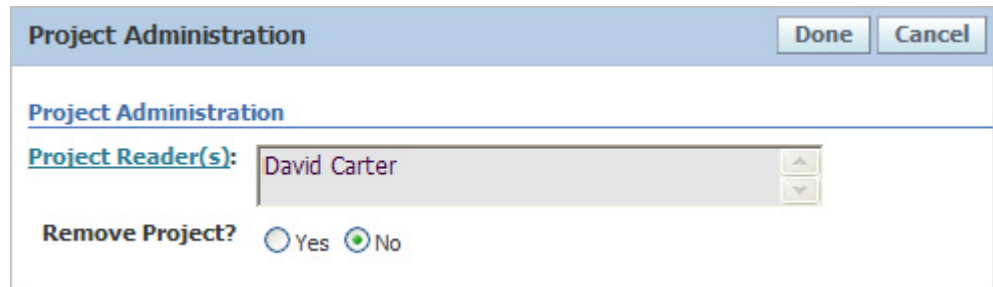
Deleting a Project

Projects can be deleted from view in the system. A certain role is required for this. Refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information about roles.

To delete a project:

- 1 Open the project.
- 2 Click **Admin** in upper left corner of the page (this button is only visible to users with a certain role). The Project Administration dialog box is displayed, as shown in figure 5-51 below.
- 3 Select **Yes** next to the Remove Project? field.
- 4 Enter an explanation in the free text field.
- 5 Click **Done**.

Figure 5-51: Project Administration dialog box



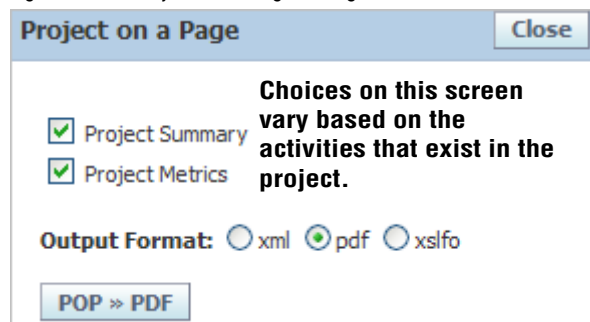
Using the Project on a Page Feature

Use the Project on a Page (POP) feature to view the project summary activities, project schedule activities, and project metrics in PDF format. You can select any or all of these elements to view. The available activities to select are dependent on what is present in the project.

To view the project on a page:

- 1 Open the project.
- 2 Click **POP** in the top right of the page. The Project on a Page dialog box is displayed. By default, all elements related to the project are selected, as figure 5-52 shows below.

Figure 5-52: Project on a Page dialog box



- 3 Deselect the elements you are not interested in viewing. One element must be selected in order to run Project on a Page.
- 4 Click **POP >> PDF**.
- 5 A PDF file displays containing the sections that were selected.

Printing a Project

Use the print feature to selectively print areas of a project.

To print a project:

- 1 Open the project.
- 2 Click **Print** in the upper right corner of the page. The Print Options dialog box displays, as figure 5-53 shows below.

Figure 5-53: Print Options dialog box

The Print Options dialog box has a title bar with 'Print Options' and buttons for 'Print' and 'Close'. It contains a table with the following data:

	Astronaut Ice cream (5002561)	Status	Print
	Astronaut Ice cream	Stage 1 - Ideation	
	Project Summary		<input checked="" type="checkbox"/>
	Project Metrics		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Project Team		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Stage Documents		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Project Activities/Documents Summary		<input checked="" type="checkbox"/>

Below the table, the 'Output Format' is set to 'pdf' (selected), with options for 'xml' and 'xslfo' also visible.

- 3 Select the areas you are interested in printing by clicking the corresponding checkbox in the Print column. Print options are:
 - **Project Summary**—Prints a project summary.
 - **Project Metrics**—Prints the project-level metrics.
 - **Project Team**—Prints the Team Member Formulation Requirements for each selected stage. Clicking the expand list icon (☐) in the first column expands the list to show all the stages.
 - **Stage Documents**—Prints the template stage questions and responses for each selected stage. Clicking the expand list icon (☐) in the first column expands the list to show all the stages.
 - **Project Activities/Documents Summary**—Prints a summary of all activities and supporting documents associated to the project. Clicking the expand list icon (☐) in the first column expands the list to show all activities and documents.
- 4 Click **Print**. A PDF containing the selected elements will open in another window. You can review and print the project.

Working with Activities

Adding an Activity Template from the Library to a Project

To add an activity template from a library to a project:

- 1 Place the project in edit mode by clicking **Edit** in the upper left corner of an opened project.
- 2 Click the **Activities** tab, as figure 5-54 shows below:

Figure 5-54: Activities tab

NPD - (Stage 1)

[Summary](#)
[Metrics](#)
[S1 Project Team](#)
[S1 Ideation](#)
[S1 Activities](#)
[S1 Toolbox](#)
[Supporting Documents](#)

Activities (from Project Templates)

Activity Name		Description	Owner	Status
Idea Capture Idea Capture				
New Idea Screening Matrix New Idea Screening Matrix				
Project Schedule Project Schedule				
Pre-Screening Meeting Minutes Pre-Screening Meeting Minutes				

[Add / Update Activities](#)

Activities (from Library)

Activity Name		Description	Owner	Status

[Add / Update Activities](#)

Activities (for this Project only)

Activity Name		Description	Owner	Status

[Add / Update Activities](#)

Global Checklist Items

Global Checklist Items	Online Tools	Current Status
Project Approval	The System will automatically request appropriate signatures based on business case.	

Current Project Status

Ideation	Concept Qualification	Product Qualification	Market Qualification	Launch
Stage 1	Stage 2	Stage 3	Stage 4	Stage 5
Started David Carter 12/4/2007				

- 3 Click **Add/Update Activities** below the Activities (from Library) section. The Edit Activities dialog box displays existing activity templates. The Add Activity button displays at the bottom of the Activity Name section.

Figure 5-55: Edit Activities dialog box

Edit Activities		Done
Activity Name	Dependency	
Idea Capture Idea Capture	Project Stage/Gate dependent on this activity? : Yes Activity must reach: Complete before Project leaves: Ideation Required?: Yes	
New Idea Screening Matrix New Idea Screening Matrix	Project Stage/Gate dependent on this activity? : No Activity must reach: N/A before Project leaves: N/A Required?: N/A	
Project Schedule Project Schedule	Project Stage/Gate dependent on this activity? : No Activity must reach: N/A before Project leaves: N/A Required?: N/A	
Pre-Screening Meeting Minutes Pre-Screening Meeting Minutes	Project Stage/Gate dependent on this activity? : No Activity must reach: N/A before Project leaves: N/A Required?: N/A	

Add Activity

- 4 Click **Add Activity**. A dialog box displays activity templates, as figure 5-56 shows below:

Figure 5-56: Activity template dialog box

Australasia - Consumer Products

Europe

Latin America





North America


- ☐ 12 Week Post-Audit
- ☐ 24 Week Post-Audit
- ☐ 52 Week Post-Audit
- ☐ BL Act Template 22
- ☐ Code Request
- ☐ Concept Screening - v2
- ☐ Concept Screening
- ☐ Customer Review
- ☐ Document Collaboration



Done Close

- 5 Browse to and select the appropriate activity template, then click **Done**. The activity template dialog box closes. The Edit Activities dialog box is refreshed in edit mode and displays the template you added.

Figure 5-57: Edit Activities dialog box

Edit Activities			Done
Activity Name	Dependency		
 Idea Capture Idea Capture	Project Stage/Gate dependent on this activity? : Yes Activity must reach: Complete before Project leaves: Ideation Required?: Yes		
 New Idea Screening Matrix New Idea Screening Matrix	Project Stage/Gate dependent on this activity? : No Activity must reach: N/A before Project leaves: N/A Required?: N/A		
 Project Schedule Project Schedule	Project Stage/Gate dependent on this activity? : No Activity must reach: N/A before Project leaves: N/A Required?: N/A		
 Pre-Screening Meeting Minutes Pre-Screening Meeting Minutes	Project Stage/Gate dependent on this activity? : No Activity must reach: N/A before Project leaves: N/A Required?: N/A		
Add Activity			

- 6 Click the edit icon () in the first column to edit the selected activity.
- 7 Determine if the project's stage requirements are dependent on this activity.
 - a If it is, select **Yes** for the Project Stage/Gate dependent on this activity? question.
 - b If it is not, select **No**.
- 8 If **Yes** was selected for the question in Step 7, describe the dependency by selecting an activity stage in the **Activity must reach:** drop-down list and a project stage in the **before Project leaves:** drop-down list. The activity must now reach its selected stage before the project can be transitioned to the selected project stage given at least one of the following is true:
 - **Yes** is selected for Required?, or
 - The activity has been created

If **No** was selected for Required?, then the dependency is only enforced if the activity exists. If **Yes** is selected, then the activity is required and the dependency will be enforced.
- 9 If more than one activity templates exist, you can reorder them by selecting the reorder row icons () in the fourth column.
- 10 To save the row, click the apply changes icon () in the first column.
- 11 Click **Done** to return to the Project page. The activity templates will now appear in the Activities (from Library) section.

Adding a Custom Activity Template to a Project

To add a custom activity template to a project:

- 1 Place the project in edit mode by clicking **Edit** in the upper right corner of an opened project.
- 2 Click the **Activities** tab.

- 3 Click **Add/Update Activities** displayed below the Activities (for this Project only) section.
- 4 You can now add a custom activity template that has already been added to this project in another stage by clicking **Add Activity**, or you can create a new activity template that will only be available in the current project by clicking **Create Custom Activity**. The latter will open the Activity Template detail page where you fill in the appropriate data.

Figure 5-58: Add Activity button

Activity Name	Dependency
Idea Capture	Project Stage/Gate dependent on this activity? : Yes Activity must reach: Complete before Project leaves: Ideation Required?: Yes
New Idea Screening Matrix	Project Stage/Gate dependent on this activity? : No Activity must reach: N/A before Project leaves: N/A Required?: N/A
Project Schedule	Project Stage/Gate dependent on this activity? : No Activity must reach: N/A before Project leaves: N/A Required?: N/A
Pre-Screening Meeting Minutes	Project Stage/Gate dependent on this activity? : No Activity must reach: N/A before Project leaves: N/A Required?: N/A

Add Activity

- 5 After adding the custom activity template, enter the project dependency date. See step 7 and step 8 in [Adding an Activity Template from the Library to a Project](#) on page 5-50 for more information.
- 6 To save the row, click the green apply changes icon (✓).
- 7 Click **Done** to return to the Project page.

Updating a Project Activity Dependency

To update a project activity dependency:

- 1 Place the project in edit mode by clicking **Edit** in the upper right corner of an opened project.
- 2 Click the **Activities** tab.
- 3 Click **Add/Update Activities** below the appropriate section.


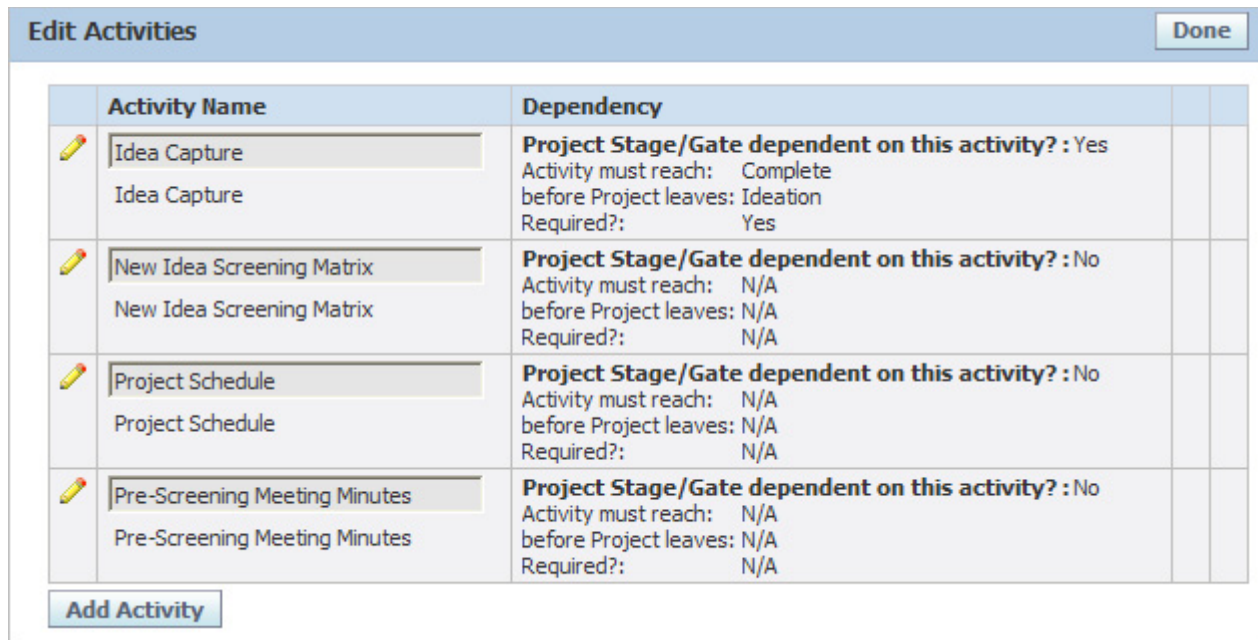





- 4 In the Activity Name dialog box, shown in figure 5-59 below, click the edit icon (). The activity displays in edit mode.

Figure 5-59: Activity Name dialog box



Edit Activities				Done
	Activity Name	Dependency		
	Idea Capture Idea Capture	Project Stage/Gate dependent on this activity? : Yes Activity must reach: Complete before Project leaves: Ideation Required?: Yes		
	New Idea Screening Matrix New Idea Screening Matrix	Project Stage/Gate dependent on this activity? : No Activity must reach: N/A before Project leaves: N/A Required?: N/A		
	Project Schedule Project Schedule	Project Stage/Gate dependent on this activity? : No Activity must reach: N/A before Project leaves: N/A Required?: N/A		
	Pre-Screening Meeting Minutes Pre-Screening Meeting Minutes	Project Stage/Gate dependent on this activity? : No Activity must reach: N/A before Project leaves: N/A Required?: N/A		

Add Activity

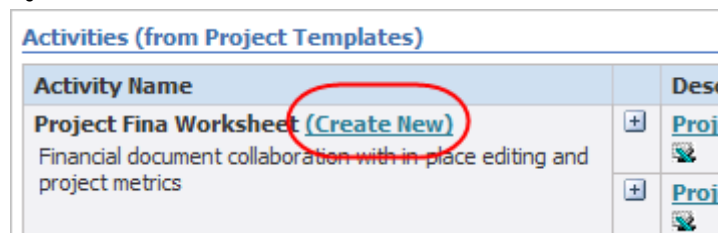
- 5 Update the appropriate template and dependency data.
- 6 Save the row by clicking the apply changes icon ().
- 7 Click **Done** to return to the Project page.

Creating a New Activity on the Project

To create a new activity on the project:

- 1 Open the project and ensure you are in read-only mode.
- 2 Click the **Activities** tab.
- 3 Click the **Create New** link in any of the three sections, next to the appropriate activity template. Figure 5-60 shows one activity section:

Figure 5-60: Create New link



Activities (from Project Templates)	
Activity Name	Desc
Project Fina Worksheet (Create New) Financial document collaboration with in place editing and project metrics	Project
	Project

A new Activity dialog box is displayed.


- 4 Make changes to the activity using the page tabs, then click **Save** or **Save & Close**.

Editing an Existing Activity

To edit an existing activity:

- 1 To edit an activity for a project, open the project and ensure you are in read-only mode.
- 2 Click the **Activities** tab.

Figure 5-61: Activities section



Activities (from Project Templates)			
Activity Name	Description	Owner	Status
Project Schedule (Create New) Project Schedule	Project Schedule (30-Sep-2007)	David Carter	 Draft

- 3 Click the link of the activity to be edited in the Description column of one of the activities section. The Activity detail dialog box displays.
- 4 Click **Edit** in the upper right corner of the page.
- 5 Edit the appropriate data.
- 6 Click **Save** or **Save and Close**.

Approving or Rejecting an Activity

The users defined in the Signature section of an activity will have an action in the NPD Signature Requests on their Action Items page when an approval is requested from them. They will also receive an email notifying them that their signature has been requested.



To approve or reject an activity:

- 1 Click the selected activity action item, or on the hyperlink included in the email notification.
- 2 Review contents of the activity by clicking the **Click HERE to review the original activity** link.
- 3 Close the Activity window.
- 4 Click **Workflow**.
- 5 Add comments in the Comments field.
- 6 Select **GO** or **NO GO**, then click the move step forward icon () or the move step back icon () to submit your decision.

Moving an Activity to the Next Step in the Workflow

Once all the approvers have approved the activity and all the sub-activity dependencies have been satisfied, the activity is ready to be transitioned to the next step in the workflow by one of the owners. The owners will have this activity in the NPD Action Items list on their Action Items page and they will receive an email notification that all approvals have been received.

To transition the activity:

- 1 Open the activity by clicking on the selected activity action item linked name in the NPD Action Items section on the Action Items page. You can also open the activity by clicking the hyperlink contained in the email notification.
- 2 Click **Workflow**.
- 3 Add comments in the Comments field as needed, then click the move step forward icon () or the move step back icon () to move the activity forward or backward in the workflow.

Searching and Browsing Activity Templates**To search or browse existing activities:**

- 1 Click **Templates > Activity Templates** from the left navigation panel.
- 2 Select the Taxonomy tab to browse by business unit, or
Select the Search tab to search by activity template attributes.

Creating an Activity Template**To create an activity template:**

- 1 Click **Templates > Activity Templates** from the left navigation panel.
- 2 Click **Create New**.
- 3 Fill in appropriate information.
- 4 Click **Save** or **Save & Close**.

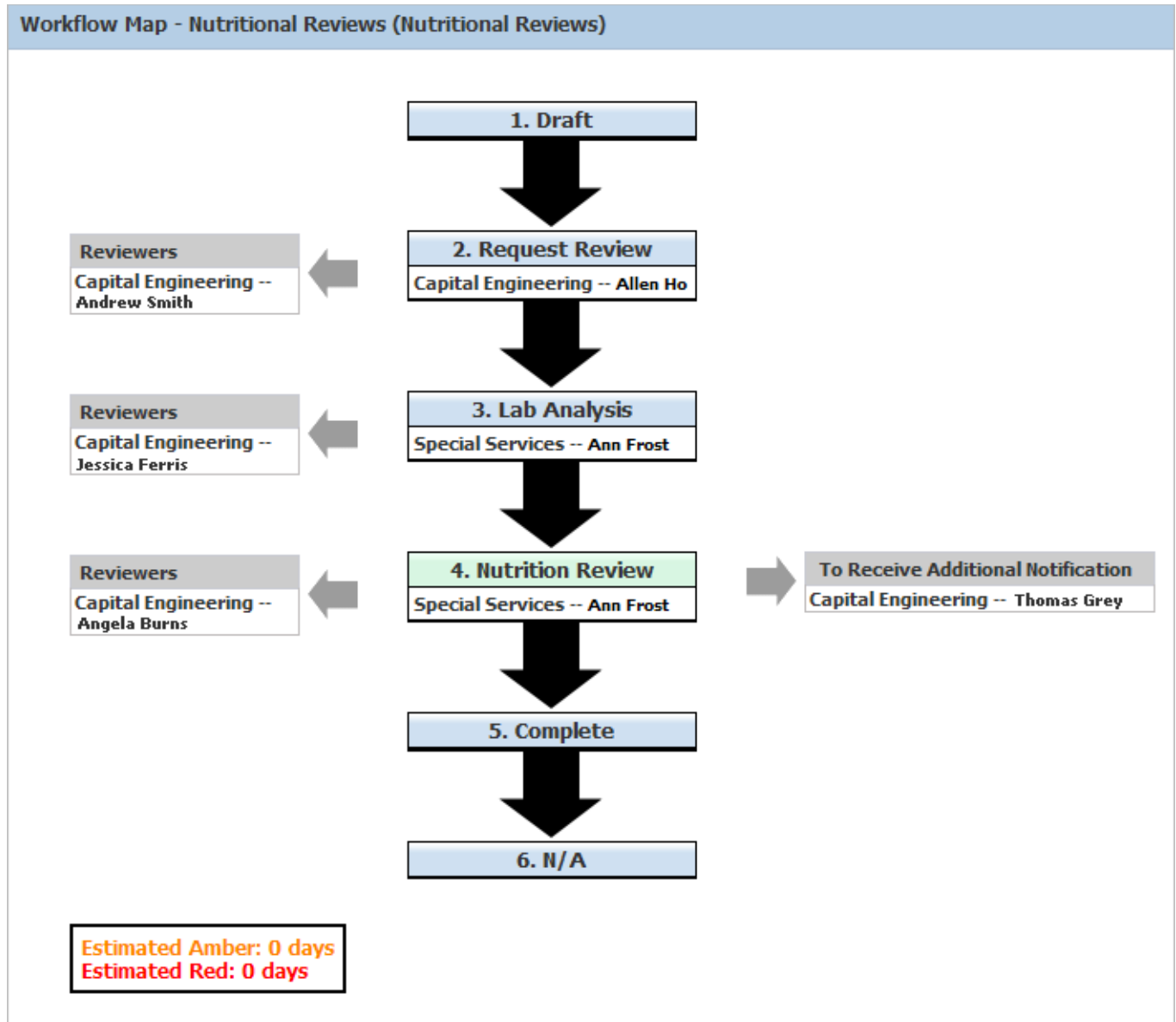
Deleting an Activity Template**To delete an activity template:**

- 1 Open the activity template.
- 2 Click **Edit**. A new link, **Show Document Admin >>**, appears at the bottom of the page.
- 3 Click **Show Document Admin >>**. A new section will be displayed.
- 4 In the new section fill in the reason for deleting this template.
- 5 Click **Continue**. Two buttons will appear that enable you to continue or cancel.
- 6 Click **Confirm Delete**.

Viewing an Activity Workflow

To see a visual representation of the project's workflow, including the steps and team members, click **Map**. Figure 5-62 shows a sample map.

Figure 5-62: Map of activity workflow



CHAPTER 6

Action Items

This chapter describes how to use action items. It includes the following topics:

- ❑ Understanding Action Items
- ❑ Action Items Tab
- ❑ Strategic Briefs and Projects Tab

Understanding Action Items

The Action Items page serves as the main dashboard for New Product Development (NPD), informing you of any outstanding actions as well as providing a list of projects and strategic briefs with which you have a relationship. This page consists of two tabs, as shown in figure 6-1:

- Action Items
- Strategic Briefs and Projects

Figure 6-1: Action Items page

Action Items

Strategic Briefs and Projects

Innovations/Sales Pipeline Action Items for Randal Burrier

	Description	Owner	Status
+	Coconut Chicken Strips (ISP)	Randal Burrier	Idea Review
	Fajita Pizza (ISP)	Randal Burrier	Draft
	Frozen Smoothie (ISP)	Randal Burrier	Draft
	Hamburger on Whole Wheat Bun (ISP)	Randal Burrier	Draft

NPD Signature Requests for Randal Burrier

	Title	Owner	Status
	Coconut Chicken Strips (ISP Form Signature Request)	Randal Burrier	Review

NPD Action Items for Randal Burrier

	Description	Owner	Status
	(Ideation Demo)	Randal Burrier	Draft
+	12 Week Post-Audit (rqs v460 proj 1)	Randal Burrier	Draft
+	Customer Review (Sunny Days - Frozen Snack)	Randal Burrier	Final review
	Document Collaboration (Sunny Days - Frozen Snack)	Randal Burrier	Draft

Action Items Tab


The Action Items tab contains three sections that inform you of outstanding actions for innovation sales pipelines (ISPs), projects, and strategic briefs. The Owner column will be shaded light green if you, the logged in user, are the “direct” owner. The Owner column will be shaded gray if you are an “indirect” owner. Indirect ownership occurs in one of two ways:

- **Temporary Signature Authority**—You have been assigned items through temporary signature authority. The name of the owner who granted you temporary signature authority displays. Refer to Chapter 8, [Temporary Signature Authority](#) for more information.
- **Group Membership**—You are a member in the assigned group. The group name displays in brackets.

Figure 6-2: Shaded Owner column


+	Member of group	David Carter	Draft
+		NPD User, [Prodika QA]	Review
+	Temporary signature authority assigned by this user	Tim Reed	Review
+		David Carter	Draft

Innovation/Sales Pipeline Action Items Section

This section displays the ISPs that you are an owner of that have not reached the “Approved” stage. You can click on the link in the Description column to open the ISP, or you can click the open item in new window icon () to open the ISP in a dialog box.


The Status column displays the status of the ISP corresponding to its Start Date, Amber Date, and Red Date.

NPD Signature Requests Section

This section displays the ISPs, projects, activities, and strategic briefs that require your signature. You can click on the link in the **Title** column to open the NPD entity, or you can click the open item in new window icon () to open it in a dialog box.

The Status column displays the status of the signature request.

NPD Action Items Section

This section displays the project activities that you currently own. You can click on the link in the **Description** column to open the activity, or you can click the open item in new window icon () to open it in a dialog box.

The Status column displays the status corresponding to the Start Date, Amber Date, and Red Date of the activity.

Strategic Briefs and Projects Tab

This tab shows the projects and strategic briefs that you are an owner of that have not reached the final stage. It also shows the projects and strategic briefs that you are a team member of, for the current stage.

To open the project or strategic brief, click on the link in the **Title** column. The RAG/SLA column displays the status corresponding to the Start Date, Amber Date and Red Date of the activity.

Portfolio Management

This chapter describes how to manage projects using the portfolio management feature. It includes the following topics:

- ❑ *Portfolio Management Overview*
 - ❑ *Layouts*
 - ❑ *Analytics*
 - ❑ *Portfolios*
-

Portfolio Management Overview

Project portfolios are customizable views which allow you to see the progress of multiple projects in a condensed form. Use portfolios to view collections of projects, based on user-defined attributes. The portfolios can be private or shared with other users. They can also be exported to Excel for further review and analysis.

Portfolio management views enable product teams to more easily track and manage projects throughout the development lifecycle:

- ❑ NPD users may aggregate projects into discrete portfolios for management, reporting, and convenient access.
- ❑ Portfolio analytics help quantify the health of projects according to project schedules and discrete activities occurring within each stage.
- ❑ Portfolio views provide direct access to supporting materials such as Project On a Page (POP), project activities, and supporting documents.
- ❑ Custom analytics can be added based on specific business unit requirements and global best practices.

Layouts

Portfolios are a grouping of projects based on user-defined criteria. The portfolio uses layouts to display selected project data. In figure 7-1 below, the Financial tab contains a customized layout. The portfolio can contain multiple customized layouts that will be displayed as tabs. The Project Management and Analytics tabs are not customized layouts. They are standard for every portfolio.

A layout can contain multiple user selected columns that display various project information.

Figure 7-1: Portfolio Summary page





Portfolio Summary

Portfolio Title: Strategic Growth Projects
Description: A portfolio of Strategic watch projects for FY08
Originator: David Carter
Shared With: Pamela Cooper

Standard tabs

Demo Tab Project Management Analytics

Displayed: Active

	Project	NPV (actual USD)	Ann DI (000 USD)	stage-Name
	Sunny Days - Frozen Snack	30,000,000	40,000	Stage 2 - Screening
	Beef Re-mix Patties	1,000,000	1,100	Stage 3 - Product Qualification
	Astronaut Ice Cream	30,000,000	40,000	Stage 1 - Ideation
	New Batter Mix	2,000,000	2,795	Stage 3 - Product Qualification
Totals:	Count =4	63,000,000	83,895	

Managing Layouts

To access portfolio layouts, click **Portfolio Mgmt > Manage Layouts** from the left navigation panel. The Portfolio Layouts page is displayed. It contains all saved layouts.

Portfolio Layout Page

Select a layout to view more detail on the Portfolio Layout page, shown in figure 7-2 below. The Layout page contains the definition of the layout including who can use it and what columns will display.

Figure 7-2: Portfolio Layout page

Portfolio Layout
Edit
Create New Copy
Close

Layout Summary

Title: SGD-TEST-001
Description: TEST
Shared With: Pamela Cooper
Created By: David Carter

Layout Columns

Column Title	Description
Stage	Stage
Days	Project Days
Expected Launch Date	In Market Launch Date
Team Leaders	Team Leader(s)
Project Schedule	Project Schedule
Schedule	Project Schedule

Layout Summary Section

This section, shown in figure 7-3 below, provides key information about the layout.

Figure 7-3: Layout Summary section

Layout Summary

Title: SGD-TEST-001
Description: TEST
Shared With: Barbara Williams
Created By: David Carter

Key fields include:

- **Title**—The title is displayed on the tab header for this layout when used within a portfolio. This is a required field.
- **Shared With**—Use this field to specify which users and groups can insert this layout on a portfolio. This field also controls which users and groups can view this layout from the Manage Layouts page.

Layout Columns Section

Use this section to determine which columns are visible in the layout. When the page is in edit mode, you can click **Add New** to create a new column, or click **Reorder/Remove** to change the column order or remove a column.

Figure 7-4: Layout Columns section in edit mode

Layout Columns	
Column Title	Description
Stage	Stage
Days	Project Days
Expected Launch Date	In Market Launch Date
Team Leaders	Team Leader(s)
Project Schedule	Project Schedule
Schedule	Project Schedule
<input type="button" value="Add New"/> <input type="button" value="Reorder/Remove"/>	

Creating a Layout

Creating a layout requires a certain role. Refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information.

To create a layout:

- 1 Click **Portfolio Mgmt > Manage Layouts** from the left navigation panel. A page listing the layouts that you have access to is displayed.
- 2 Click the **Add New** button located under the list of layouts. The Portfolio Layout page is displayed.
- 3 Provide a layout title in the **Title** field. This is a required field.
- 4 Enter a description in the **Description** field.
- 5 Select users and groups to share the layout with in the **Shared With** field.
- 6 To add a column to the layout, click **Add New** under the Layout Column section. The Layout Column dialog box is displayed, as figure 7-5 shows below:

Figure 7-5: Layout Column dialog box

Layout Column

Column Type:
☒ Project Management
 ☐ Project Metric

Column Title:

Project Management Parameter:

- 7 Select a column type. There are two column types:
 - **Project Management**—These columns refer to certain attributes of the project, such as internal project number and stage.
 - **Project Metric**—These columns refer to metrics that exist for the project.

Figure 7-6: Project Management column type

Column Type: ☒ Project Management ☐ Project Metric

Column Title:

Project Management Parameter: ▼

Figure 7-7: Project Metric column type

Column Type: ☐ Project Management ☒ Project Metric

Column Title:

Project Metric:

Currency: ▼

Units: ▼

Show Total: ☐

- 8 Enter a title for the column in the **Column Title** field (required).
- 9 If you selected the Project Management project type, select a choice from the Project Management Parameter drop-down list, or

If you selected the Project Metric column type, click the **Project Metric** link. A dialog box is displayed. Search and select the project metric. Select the appropriate currency and units for the metric. Click the **Show Total** check box if you want a total row at the bottom of the layout to be the sum value for this metric.

- 10 Click **Done**.
- 11 Add additional columns as needed.
- 12 Reorder or remove columns by clicking **Reorder/Remove**.
- 13 Click **Save** or **Save & Close**. The Portfolio Layout page is displayed. Your newly created layout is ready to be used in a project portfolio.

Analytics

An analytic is a graphical representation of metrics across all projects of the portfolio. The analytic data can be displayed by stage or by project type. Multiple analytics can be displayed on the same graph in varying chart types, such as Line, Column, and Area. Analytics requires the customer purchase a third-party charting software.

Analytics are stored in the analytic library in the **Portfolio Mgmt. > Manage Analytic** link on the left navigation panel and can be loaded into a portfolio.

Managing Analytics

To manage the analytics in the analytic library, click **Portfolio Mgmt. > Manage Analytics** on the left navigation panel. A list of the existing analytics is displayed in the Portfolio Analytics page, as shown in figure 7-8 below:

Figure 7-8: Portfolio Analytics page

Portfolio Analytics		
Analytic Overview		
Title	Owner	
DI/NPV By Stage	David Carter	✖
NPV	David Carter	✖
DI/NPV By Stage	David Carter	✖
Add New		

To create a new analytic, click **Add New**.

To view an analytic definition, click the link in the **Title** column.

Chart Parameters Section

Use the Chart Parameters section to name and define the chart by either stage or project type.

Figure 7-9: Portfolio Analytics dialog box

Chart Parameters

Chart Title:

Group By:

Stage

▼

Enable 3D:

☐

Series

4 Yr NPV -- No Basis, Launch, FY06	▼	Column	▼
4 Yr NPV -- No Basis, Launch, FY06	▼	Point	▼

[add series...](#)
[delete series](#)

Select a metric here

Select a chart type here

Key fields include:

- **Chart Title**—The analytic will be referred to by this name.
- **Group By**—Select Stage or Project Type from the drop-down list. This setting determines how the chart should be grouped.
- **Enable 3D**—Check this checkbox to include a three dimensional visual representation of the graph.

Series Section

Use the Series section to define which metric to graph and what chart type to use. Multiple metrics can be displayed within one analytic.

Key fields include:

- **Metric drop-down list (unlabeled)**—Select a project metric to be graphed.
- **Chart type (unlabeled)**—Select the type of chart to be displayed.

Related links include:

- **add series**—Click this link to add more series to the analytic.
- **delete series**—Click this link to delete a series.

Note Certain combinations of series cannot be drawn together and may result in an error.

Using Analytics

Refer to [Portfolio Management Overview](#) on page 7-1 to see how analytics are used.

Portfolios

Viewing a Portfolio

To view a portfolio:

- 1 Click **Portfolio Mgmt. > Portfolios** on the left navigation panel. The Project Portfolio(s) page is displayed. It lists all the portfolios that you have access to.
- 2 Click the title link in the **Title** column to open the portfolio in a dialog box, as figure 7-10 shows below:

Figure 7-10: Portfolio details

[Export](#)
[Create New Copy](#)
[Edit](#)













Strategic Growth Projects

Portfolio Summary

Portfolio Title: Strategic Growth Projects
Description: A portfolio of Strategic watch projects for FY08
Originator: David Carter
Shared With: Lisa Gonzales

[Demo Tab](#)
[Project Management](#)
[Analytics](#)

Displayed: Active

	Project	NPV (actual USD)	Ann DI (000 USD)	stage-Name
  	Sunny Days - Frozen Snack	30,000,000	40,000	Stage 2 - Screening
  	Beef Re-mix Patties	1,000,000	1,100	Stage 3 - Product Qualification
  	Astronaut Ice Cream	30,000,000	40,000	Stage 1 - Ideation
  	New Batter Mix	2,000,000	2,795	Stage 3 - Product Qualification
Totals:	Count =4	63,000,000	83,895	

Portfolio Summary Section

The Portfolio Summary section, shown in figure 7-11 below, captures high-level information for the portfolio.

Figure 7-11: Portfolio Summary section

Portfolio Summary

Portfolio Title: Strategic Growth Projects
Description: A portfolio of Strategic watch projects for FY08
Originator: David Carter
Shared With: Tim Reed

Key fields include:

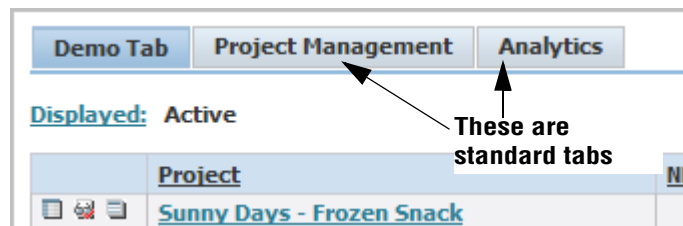
- **Portfolio Title**—The title of the portfolio. This is a required field.
- **Originator**—The originator is automatically defaulted to the user who created the portfolio. It cannot be changed.
- **Share With**—This field determines who has read access to this portfolio.

Understanding the Tabs

The data displayed in the tabs is the key information for the portfolio. The list of projects displayed is filtered by portfolio criteria that can be viewed when in edit mode, along with the Displayed field. There are three kinds of tabs that are displayed:

- **Custom Layouts**—Any custom layouts defined for this portfolio will appear in separate tabs.
- **Project Management**—This tab displays high-level schedule and activity information for each project.
- **Analytics**—This tab allows you to display analytics from the library or create and view new analytics.

Figure 7-12: Portfolio tabs section






Key fields include:

Displayed—This field filters the list of projects displayed on each tab. The possible values for the project are Active, Hold, Completed, and Terminated.

Custom Layout Tabs

These tabs display the project title along with any columns defined for the specific layout. Refer to the [Managing Layouts](#) on page 7-2 for more information.

The first column displays three icons:


- Clicking the Project on a Page icon () will open Project on a Page (POP) for the project.
- Clicking the view details in a popup icon () will open the Activities tab for the project.
- Clicking the open item in new window icon () will open the Supporting Documents tab for the project.

Other key fields include:

- **Project**—Displays the project's title. Clicking this link opens the project.

The last row is a Totals row. It displays a count of the projects returned and totals for any columns defined as project metrics that have their Total field checked.





















Figure 7-13: Totals row

  	Idea 8 'check owner'
  	Jim Smith's project
Totals:	Count =99




Project Management Tab

This tab, shown in figure 7-14 below, displays high level schedule and activity information for each project.

Figure 7-14: Project Management tab

<div> Demo Tab Project Management Analytics </div>						
Displayed: Active						
	Project	Stage	Sched.	Activities	Days	Team Leader(s)
  	Sunny Days - Frozen Snack	Stage 2 - Screening		 2/2	1393	David Carter, Bob Johnson, Cooper, Lisa Gonzales
  	Beef Re-mix Patties	Stage 3 - Product Qualification		 3/3	755	Bob Johnson, Betty Scott
  	Astronaut Ice Cream	Stage 1 - Ideation		 0/0	453	Bob Johnson
  	New Batter Mix	Stage 3 - Product Qualification		 2/3	754	Betty Scott

The first column displays three icons:

- Clicking the Project on a Page icon () will open Project on a Page (POP) for the project.
- Clicking the view details in a popup icon () will open the Activities tab for the project.
- Clicking the open item in new window icon () will open the Supporting Documents tab for the project.

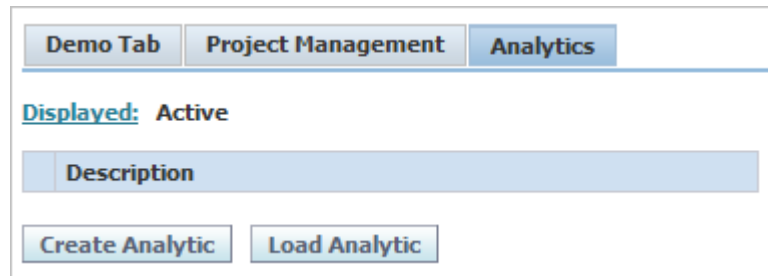
Other key fields include:

- **Project**—The project's title. Selecting this link opens the project.
- **Stage**—The current stage of the project.
- **Sched.**—Displays the Green, Amber, or Red status for the project.
- **Activities**—Displays a rollup of the activities' statuses.
- **Days**—The number of days since the project was created.
- **Team Leader(s)**—The team leaders for the project.

Analytics Tab

Use the Analytics tab to create new analytics as well as load existing analytics and view the results. An analytic is a graphical representation of project metric data for all projects and all their activities that exist in a final state, that are contained within the portfolio. For more details, refer to [Managing Analytics](#) on page 7-6.

Figure 7-15: Analytics tab



The screenshot shows the 'Analytics' tab selected in a window with three tabs: 'Demo Tab', 'Project Management', and 'Analytics'. Below the tabs, the status 'Displayed: Active' is shown. A 'Description' text box is present. At the bottom, there are two buttons: 'Create Analytic' and 'Load Analytic'.

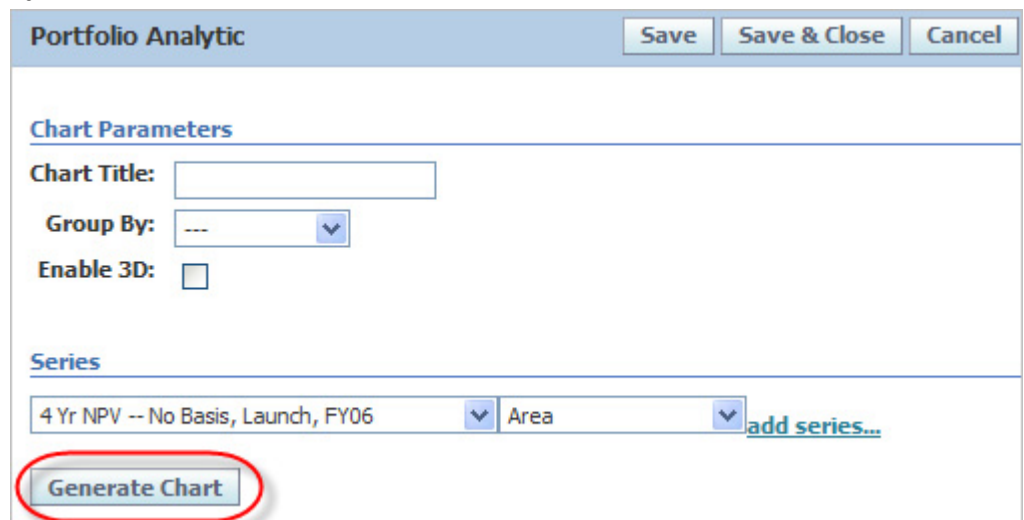
Click **Create Analytic** to create and view the results of an analytic.

Click **Load Analytic** to load an existing analytic and view the results.

Generate Chart Feature

After either loading or creating a new analytic you can view its results by clicking **Generate Chart**. Multiple metrics can be represented on the same chart with different chart types.

Figure 7-16: Generate Chart button

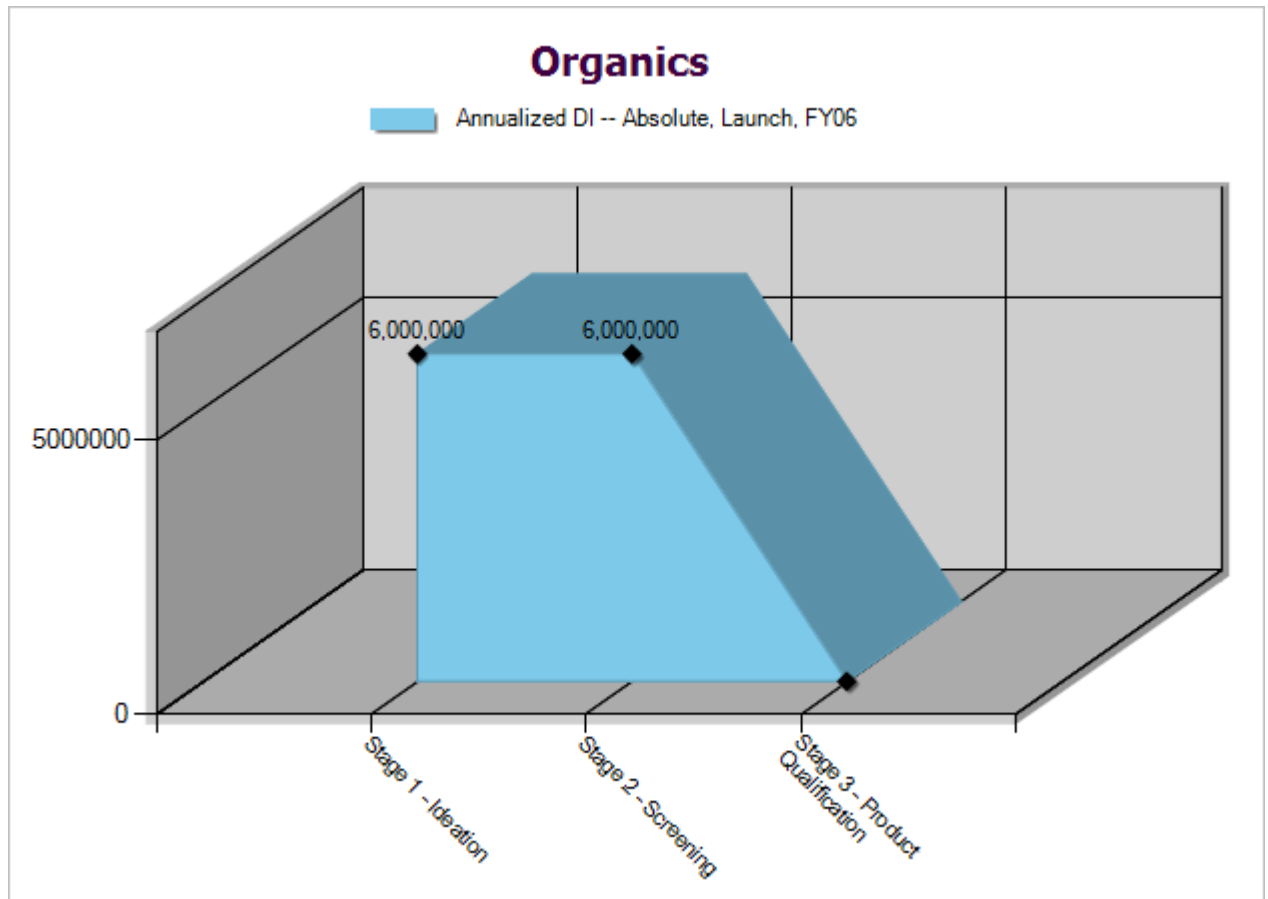


The screenshot shows the 'Portfolio Analytic' dialog box. At the top right are buttons for 'Save', 'Save & Close', and 'Cancel'. The 'Chart Parameters' section includes a 'Chart Title' text box, a 'Group By' dropdown menu, and an 'Enable 3D' checkbox. The 'Series' section shows a list with '4 Yr NPV -- No Basis, Launch, FY06' and an 'Area' chart type, with an 'add series...' link. The 'Generate Chart' button at the bottom is circled in red.

Group by Stage Feature

To view data grouped by stage, click **Stage in the Group By** field. The result will contain the stages on the X axis and the metric data on the Y axis. The metric data will be a sum of all values for each metric, per stage, that is contained in all projects and all their activities that exist in a final state for the portfolio. Figure 7-17 shows a chart containing data grouped by stage.

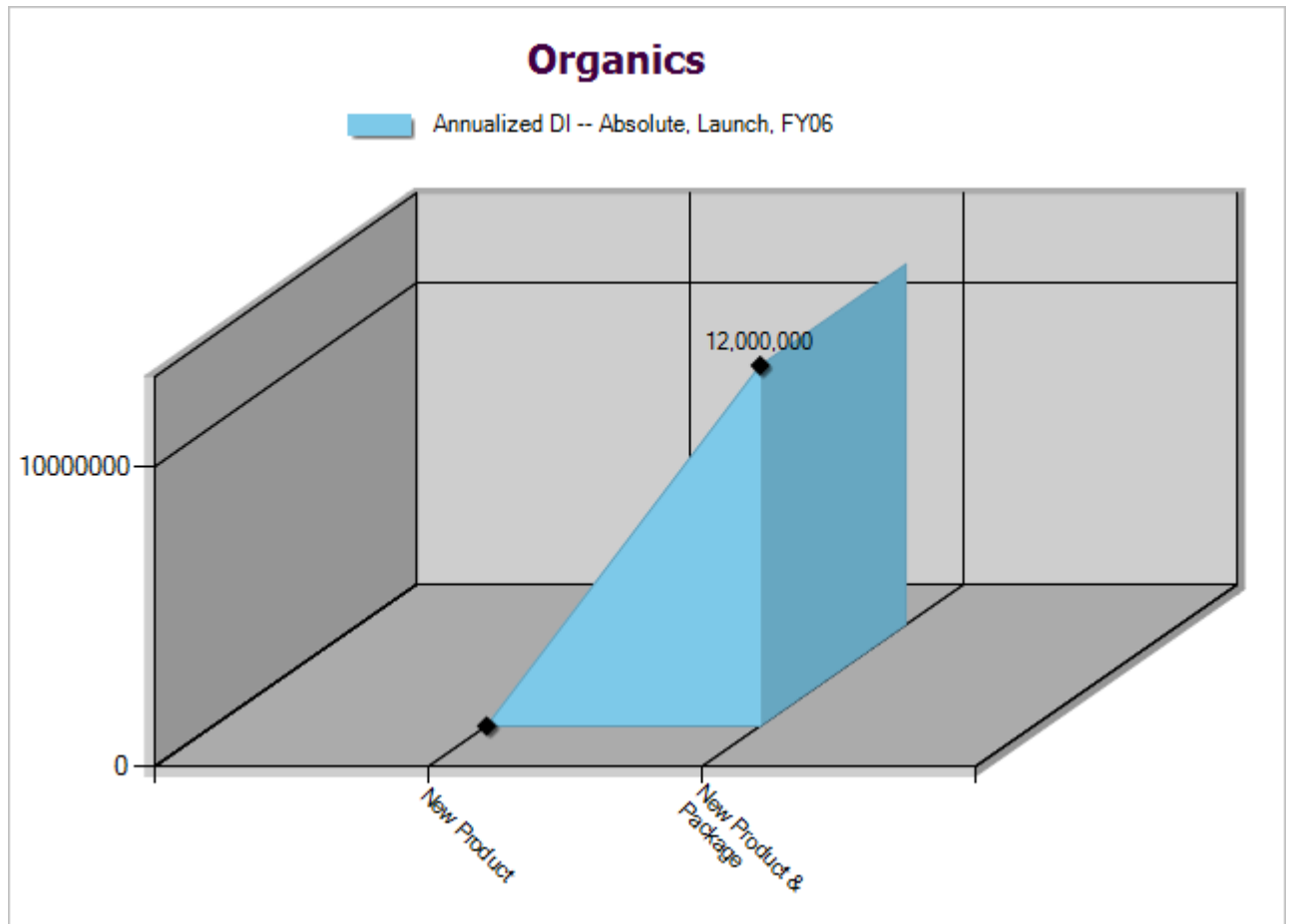
Figure 7-17: Data grouped by stage, 3D enabled



Group by Project Feature

To view the same data by project type, click **Project Type** in the **Group By** field. The result will contain the project types on the X axis and the metric data on the Y axis. The metric data will be a sum of all values for each metric per project type and all their activities that exist in a final state for the portfolio. Figure 7-18 below shows a chart containing data grouped by project.

Figure 7-18: Data grouped by project, 3D effect



Creating a New Portfolio

To create a new portfolio:

- 1 Click **Portfolio Mgmt. > Portfolios** in the left navigation panel. A table containing the portfolios that you have access to will be displayed.
- 2 Click **Add New** displayed at the bottom the table. The Project Portfolio page is displayed, as figure 7-19 shows below:

Figure 7-19: Project Portfolio page

Project Portfolio

Portfolio Overview

Created By: David Carter

Portfolio Title:

Description:

[Layouts \(Tabs\):](#)

[Shared With:](#)

[» clear Share With values](#)

Sub-attribute Filter

[Set/Change Filter Criteria](#)

- 3 Enter a title in the **Portfolio Title** field (required).
- 4 Enter a description in the **Description** field.
- 5 To add layouts to this portfolio, click the **Layouts (Tabs)** link. The Portfolio Tabs page displays containing an empty table of layouts.

Figure 7-20: Portfolio Tabs page

Portfolio Tabs [Done](#)

Title	Description	Owner
Add New Reorder/Remove		

- 6 Click **Add New**. The Layout Selections page is displayed. It contains layouts that you have access to.
- 7 Select a layout. The dialog box closes. The layout you selected displays in the table.
- 8 Add as many layouts as needed.
- 9 Reorder or remove layouts by clicking **Reorder/Remove**.
- 10 Click **Done**. The dialog box closes and the Project Portfolio page is displayed. The layouts you chose display in the Layouts (Tabs) field.

Sharing a Portfolio

To share a portfolio with others:

- 1 Click the **Shared With** link.
- 2 Search for and select the users that you would like to share the portfolio with.
- 3 Click **Done**.

Applying a Filter

To determine what projects will be visible in the portfolio:

- 1 Click **Set/Change Filter Criteria**. This button is displayed at the bottom of the Project Portfolio page, as figure 7-21 shows below.

Figure 7-21: Set/Change Filter Criteria button


The screenshot shows the 'Project Portfolio' interface. At the top right are buttons for 'Save', 'Save & Close', and 'Cancel'. Below the title 'Project Portfolio' is a section 'Portfolio Overview'. It contains fields for 'Created By: David Carter', 'Portfolio Title:' (with an empty text box), and 'Description:' (with a text box and up/down arrows). Below these are 'Layouts (Tabs):' and 'Shared With:' (both with empty text boxes and up/down arrows). Under 'Shared With:', there is a red link that says '» clear Share With values'. At the bottom, there is a table with two columns: 'Sub-attribute' and 'Filter'. Below the table is a button labeled 'Set/Change Filter Criteria'.

- 2 The Filter Criteria dialog box opens, displaying a list of filters, as shown in figure 7-22 below.

Note The filters will act as an “AND” condition on the filter, meaning that the portfolio will only display projects needing the criteria defined across all of the sub-attributes.

Figure 7-22: Filter Criteria dialog box

Filter Criteria				Done	Cancel
Attribute	Sub-attribute	Filter			
Scope	Business Unit(s)	<input type="text"/>			
	Project Type	<input type="text"/>			
	Project Visibility	<input type="text"/>			
	Strategic Brief(s)	<input type="text"/>			
	Project Name(s)	<input type="text"/>			
	Project Metric(s)	<input type="text"/>			
Team	Team Leader(s)	<input type="text"/>			
	Team Member(s)	<input type="text"/>			
	Gate Keeper(s)	<input type="text"/>			
Market	Global Categories	<input type="text"/>			
	Brands	<input type="text"/>			
	Demographics	<input type="text"/>			
	Channels	<input type="text"/>			
	Lead Countries	<input type="text"/>			
Schedule	Development Stage	<input type="text"/>			

- 3 Click the links in the **Sub-attribute** column to add filter criteria.
- 4 If needed, click the delete icon () to delete criteria.
- 5 Click **Done** when you are finished. The Filter Criteria dialog box closes. The Project Portfolio page displays the filter criteria you chose. All the projects that met that criteria are displayed beneath it.
- 6 Click **Save** or **Save & Close**.

Whenever this portfolio is accessed, the layouts defined in the Layouts field will be displayed as tabs. The projects listed in the tabs will be filtered according to the chosen filter criteria.

Editing a Portfolio

To edit a portfolio:

- 1 Open a portfolio by clicking the **Portfolio Mgmt. > Portfolios** link on the left navigation panel. The Project Portfolio page displays all the portfolios that you have access to.
- 2 Click the title link in the **Title** column. The portfolio opens.
- 3 Click **Edit**. The system refreshes and the page displays in edit mode.

- 4 Update the portfolio as needed.
- 5 Click **Save** or **Save & Close** to save the portfolio.

Copying a Portfolio

To copy a portfolio:

- 1 Open a portfolio, click the **Portfolio Mgmt. > Portfolios** link on the left navigation panel. The Project Portfolio page displays all the portfolios that you have access to.
- 2 Click the Title link in the **Title** column. The portfolio opens.
- 3 Click **Create New Copy**. The newly created portfolio displays with all fields copied from the original portfolio except for the portfolio title.
- 4 Enter a title for the portfolio in the **Portfolio Title** field (required).
- 5 Update the portfolio as needed.
- 6 Click **Save** or **Save & Close** to save the portfolio.

Exporting a Portfolio

To export the portfolio data contained in the layout to Excel:

- 1 Open a portfolio by clicking the **Portfolio Mgmt. > Portfolios** link on the left navigation panel. The Project Portfolio page displays all the portfolios that you have access to.
- 2 Click the Title link in the **Title** column. The portfolio opens.
- 3 Click **Export**. An Excel document is created. You will be asked to either Open or Save this document.
- 4 To open the Excel document, click **Open**. An Excel file will open containing the projects defined for this portfolio with a column for each column defined in each custom layout of the portfolio.
- 5 If needed, edit or save the Excel document.

Temporary Signature Authority

This chapter describes the temporary signature authority feature. It includes the following topics:

- ❑ *Temporary Signature Authority*
 - ❑ *Accessing Temporary Signature Authority*
 - ❑ *Creating a Temporary Signature Authority*
 - ❑ *Editing an Existing Temporary Signature Authority*
-

Temporary Signature Authority

You can use temporary signature authority in NPD to grant someone the privilege to act on your behalf for a period of time. This means that a designated user (authority grantee) can approve or disapprove signature requests and manage activity workflow on behalf of you (authority grantor).

- A temporary authority creates a relationship between an authority grantor and an authority grantee.
- The authority grantee can view and respond to signature documents that are owned by the authority grantor.
- Tasks assigned to the grantor will also appear in the Action Items list of the grantee.
- The grantee will receive an email notification when the temporary signature authority was granted.
- The grantee will be copied on notification emails sent to the grantor.

Accessing Temporary Signature Authority

Access the temporary signature authority by selecting **New Product Development > Temp Sig Authority** from the left navigation panel. The Temporary Signature Authority search page displays, as figure 8-1 shows below:

Figure 8-1: Temporary Signature Authority search page

Creating a Temporary Signature Authority

To create a new signature authority, click **Create Temporary Signature Authority** at the upper right of the page. The Temporary Signature Authority page will be displayed as figure 8-2 shows below.

Figure 8-2: Temporary Signature Authority page

Key fields include:

- **Current Owner**—The user that currently has signature authority. This field defaults to the logged in user. Certain roles can change this and grant authority for other users in the system. For more information about roles, refer to the *Agile Product Lifecycle Management for Process Administrator User Guide*.
- **Temporary Owner**—The user that will be granted temporary signature authority. This field is required.
- **Start** and **End Date**—These fields represent when the temporary signature authority begins and ends. To set these fields, click the select date icon (). This opens a calendar dialog where you can select a date.
- **Status**—Using this field, you can enable and disable the signature authority.

Editing an Existing Temporary Signature Authority

You can edit existing signature authorities that you have created. Search and select the signature authority that you would like to edit and click **Edit** at the upper right of the page. When you are done editing, click **Save & Close**.

Maintaining Templates

This chapter describes how to maintain templates in New Product Development. It includes the following topics:

- ❑ *Maintaining Templates*
- ❑ *Replacing a User*

Maintaining Templates

New Product Development's template maintenance feature provides a mechanism to easily replace a user who is a template administrator or part of the team member formulation requirements (TMFR), with another user. You can replace a user across multiple activity templates, ISP templates, project templates, and strategic briefs. You may want to use this feature when a user is no longer acting in the same capacity and someone else has assumed the role.

Replacing a User

To replace a user:

- 1 Click **Templates > Template Maintenance** in the left navigation panel. The Template Maintenance page is displayed, as figure 9-1 shows below.

Figure 9-1: Template Maintenance page

Template Maintenance

Find & Replace

User to Replace:

New User:

Replace Cancel

Replace in Templates

Add New

- 2 Click the **User to Replace** link. A user search page displays.
- 3 Search for and select the user to replace.
- 4 Click the **New User** link. A user search page displays.
- 5 Search for and select a user who will replace the previous user.

- 6 Click **Add New** in the Replace in Templates section to add the templates that are impacted by this replacement. The template search page is displayed, as figure 9-2 shows below:

Figure 9-2: Template search page

The screenshot shows a web interface for searching templates. At the top, there's a 'Project Template' dropdown menu. Below it is a section titled 'Search Criteria' which contains two dropdown menus, a text input field for search terms, and a link labeled 'more criteria...'. Underneath the search criteria are four buttons: 'Search', 'Reset', 'Save Search', and 'Load Search'. The next section is 'Search Results', which includes a 'Results Per Page' dropdown menu currently set to '10'. The final section is 'Selected Items', which is a large empty rectangular area. At the bottom of this section are three buttons: 'Remove', 'Clear', and 'Done'.

- 7 Select a template type in the drop-down list.
- 8 Use the key field drop down list, operator, and search term fields to search and select a template. You can make multiple selections. All appear in the Selected Items section.
- 9 To add templates of different types, select the type from the drop-down list, then and search and select the templates. For strategic briefs, select a business unit from the key field drop-down list instead of a template.
- 10 Click **Done**. The template search page closes.
- 11 Click **Replace** to complete the replacement. If you are the administrator for all items selected, the replacement is complete. The Template Maintenance page closes and the Activities page is displayed.

Note If you are not the administrator for all items selected, an error displays informing you which items need to be addressed (as you cannot alter templates unless you are an administrator for that template). Remove those items from the list, and then click **Replace** again.
