Agile Product Lifecycle Management for Process

New Product Development User Guide

Release 6.0.0.5

Part No. E26487-02

February 2012

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Agile Product Lifecycle Management for Process, Release 6.0.0.5

E26487-02

February 2012

DOCUMENT CONTROL

Change Record

Date	Author	Revision	Change Reference
Sept-07	Agile/Oracle	1.0	Initial release, Part No. TPPR-0015-5.1A
Feb-08	Oracle	2.0	Second release, Part No. E11005-01
Sept-09	Oracle	3.0	Third release, Part No. E12390-01
Feb-10	Oracle	4.0	Fourth release, Part No. E12390-01
Sept-10	Oracle	5.0	Fifth release, Part No. E18533-01
Aug-11	Oracle	6.0	Sixth release, Part No. E24916-01
Dec-11	Oracle	7.0	Seventh release, Part No. E26487-01
Feb-12	Oracle	8.0	Eighth release, Part No. E26487-02

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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 Adobe® Acrobat™ PDF files. The Oracle Technology Network (OTN) Web site: http://www.oracle.com/technetwork/documentation/agile-085940.html 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 Agile administrator if there is an Agile PLM for Process Documentation folder available on your network from which you can access the Agile PLM for Process documentation (PDF) files.

Note To read the PDF files, you must use the free Adobe Reader™ version 7.0 or later. This program can be downloaded from the Adobe Web site: http://www.adobe.com/.

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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	Release Notes	Agile training	Help Desk	Agile sales rep
Administering Agile PLM for Process		●		●		
Cache management		●				
Core data management		●				
Custom data management		●				
Feature requests					●	●
Group management		●				
Innovation sales pipeline	●					
Installing Agile PLM for Process				●		●
Known issues			●			
Metrics	●					
Projects	●					
Resolved issues			●			
Strategic briefs	●					
System-based roles		●				
Technical support					●	
Templates	●					

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

Information type	NPD User Guide	Admin. User Guide	Release Notes	Agile training	Help Desk	Agile sales rep
User management		●				
Using the NPD application	●			●		
Workflow management	●	●				

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
Blue italic font	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:

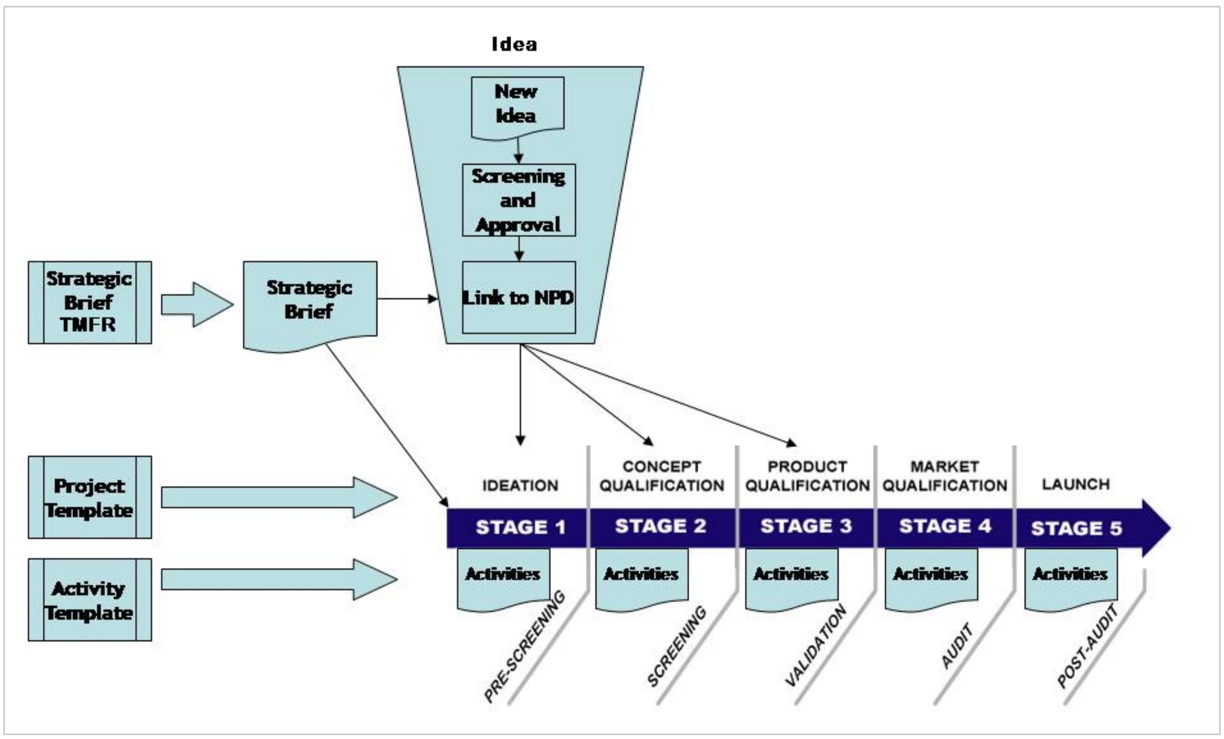
- **Projects**—Primary tool used to track and manage projects. Project-based initiatives are screened, prioritized, and actualized using a status-based workflow process.
- **Activities**—Discreet workflow-enabled tasks and deliverables required at specific stages in a project's lifecycle
- **Strategic Briefs**—A high-level plan that communicates a strategic objective for the entire or a part of the company (such as a region or a business unit). The strategic brief can be used to drive innovation and product direction and can be tied to projects to allow for strategic categorization of efforts for reporting and portfolios.

- **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 (ideas), 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 5-47 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 5-47, or for more information about GSM, refer to the *Agile Product Lifecycle Management for Process Global Specification Management User Guide*.

Supply Chain Relationship Management

Use the activities feature to tie companies and facilities managed in Supply Chain Relationship Management (SCRM) to projects. Refer to *Related Documents Section* on page 5-25, or for more information about SCRM, refer to the *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide*.

CHAPTER 2

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 ideas (ISPs) to one or more strategic briefs.

Strategic Brief Lifecycle

The strategic brief workflow is a fixed workflow. Therefore all strategic briefs will pass through the following steps:

Draft

When a strategic brief is created, the object is placed in the "Draft" status. In addition, information regarding Team Member Formulation Requirements (TMFR) is pulled from the strategic brief template identifying the common participants.

From there the owner should place information in the strategic brief in order for it to be reviewed in the next step.

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 innovation sales pipelines (ISP) ideas and projects. It cannot be modified and can only be moved to an inactive status.

Inactive

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

Access Rights

Any user that has site access to NPD can create strategic briefs.

Strategic Brief Templates

Strategic brief templates define team member formulation requirements (TMFRs) for strategic briefs based on a given NPD 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.

Note The ability to add strategic brief templates is based on the role NPD_ADMIN. For more information about user roles, refer to the *Agile Product Lifecycle Management for Process Administrator User Guide*.

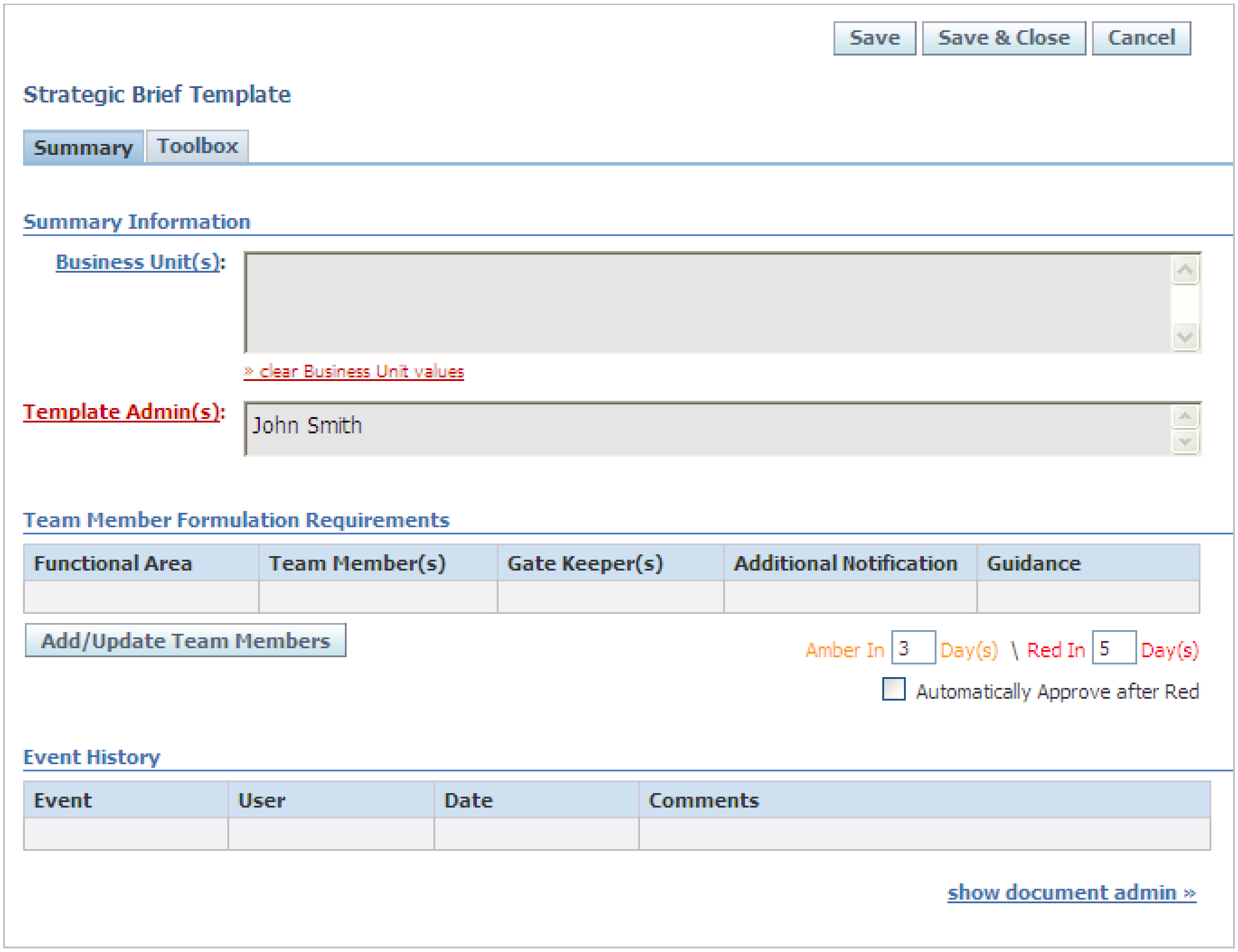
Access strategic brief templates by selecting **Templates > Strategic Brief Templates** from the left navigation panel. Agile PLM for Process displays the Strategic Brief Templates search page, as figure 2-1 shows below. Open the desired strategic brief template by using the Search tab or Category tab. 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 Templates search page

Figure 2-2 below shows the Strategic Brief Template page. This page consists of two tabs:

- Summary
- Toolbox

Figure 2-2: Strategic Brief Template page, Summary tab



Summary Tab

The Summary tab consists of the following sections:

- Summary Information
- Team Member Formulation Requirements
- Event History

Summary Information Section

Key fields include:

- **Business Unit(s)**—This field is used to determine which TMFR 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 TMFR can be assigned to each NPD 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.

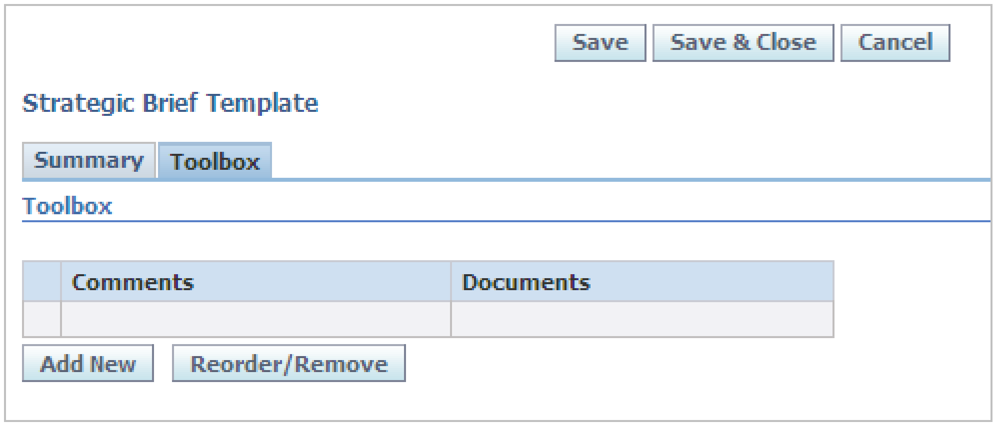
Event History Section

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

Toolbox Tab

The Toolbox tab contains a checklist of items and related supporting documents needed for the strategic brief template, as figure 2-3 shows below. 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 2-3: Strategic Brief Template page, Toolbox tab



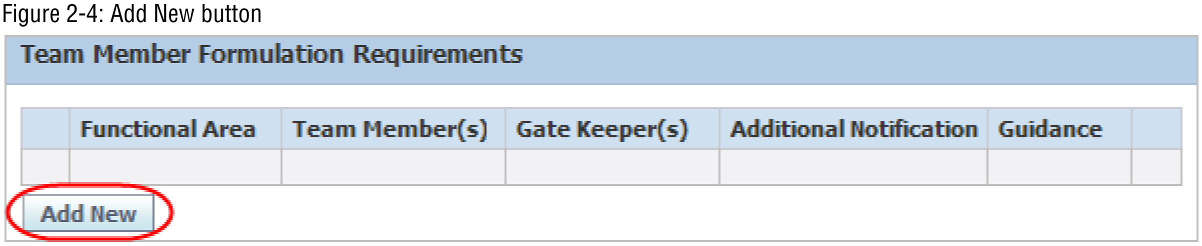
Working with Strategic Brief Templates

Creating a strategic brief template

To create a strategic brief template:

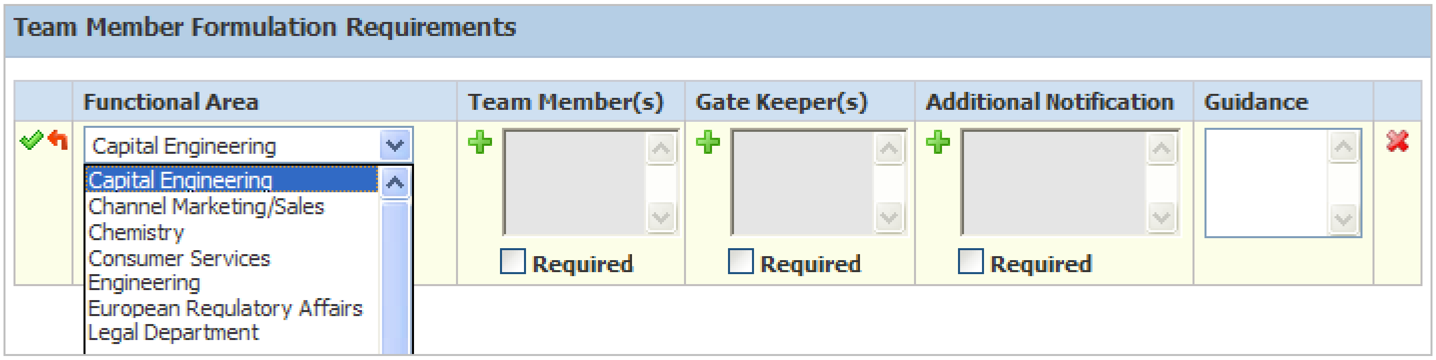
1. Click the **Templates > Strategic Brief Templates** link in the left navigation panel.
2. Click **Create New**. A new strategic brief template opens.
3. Click **Business Unit(s)**. The Business Unit dialog box is displayed.
4. Select NPD business units from the dialog box.
5. Click **Done** to save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

Figure 2-4: Add New button



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

Figure 2-5: Select a functional area



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 Template page.

15 Click **Save** or **Save & Close** to save the strategic brief template.

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.

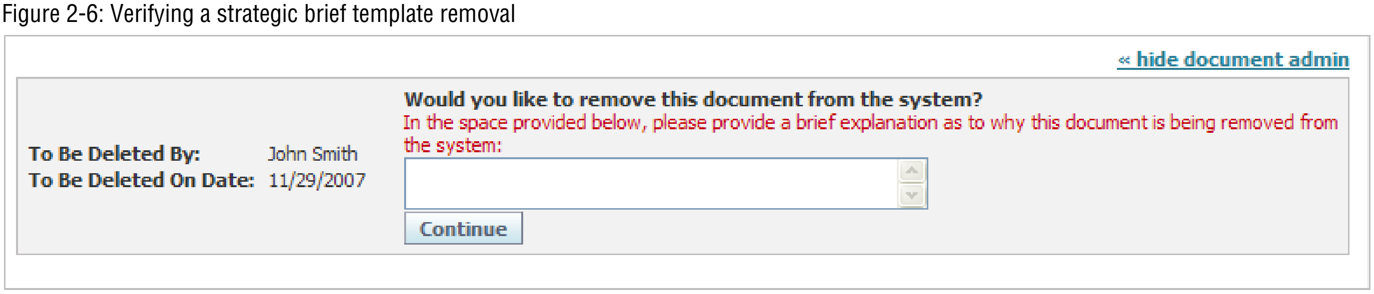
To delete a strategic brief template:

1 Open the desired strategic brief template by using the Strategic Brief Template Search tab or Toolbox tab.

2 Click **Edit**.

3 Click the **show document admin >>** link. As figure 2-6 shows, a new section appears prompting you to provide the reason for deleting the strategic brief template.

Figure 2-6: Verifying a strategic brief template removal



4 Enter the reason for deleting the template.

5 Click **Continue**. You will be asked to confirm the cancellation.

6 Click **Confirm Delete**.

Strategic Briefs

Strategic briefs are created based on defined strategic brief templates. 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 2-7 shows below. Search for and select the desired strategic brief.

Figure 2-7: Strategic Briefs search page

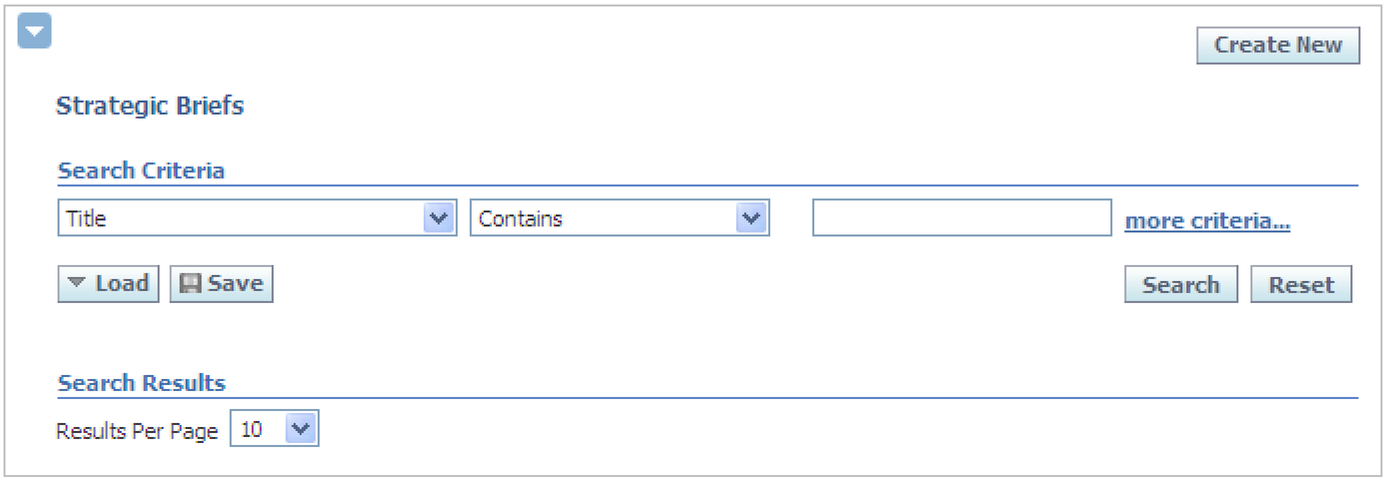
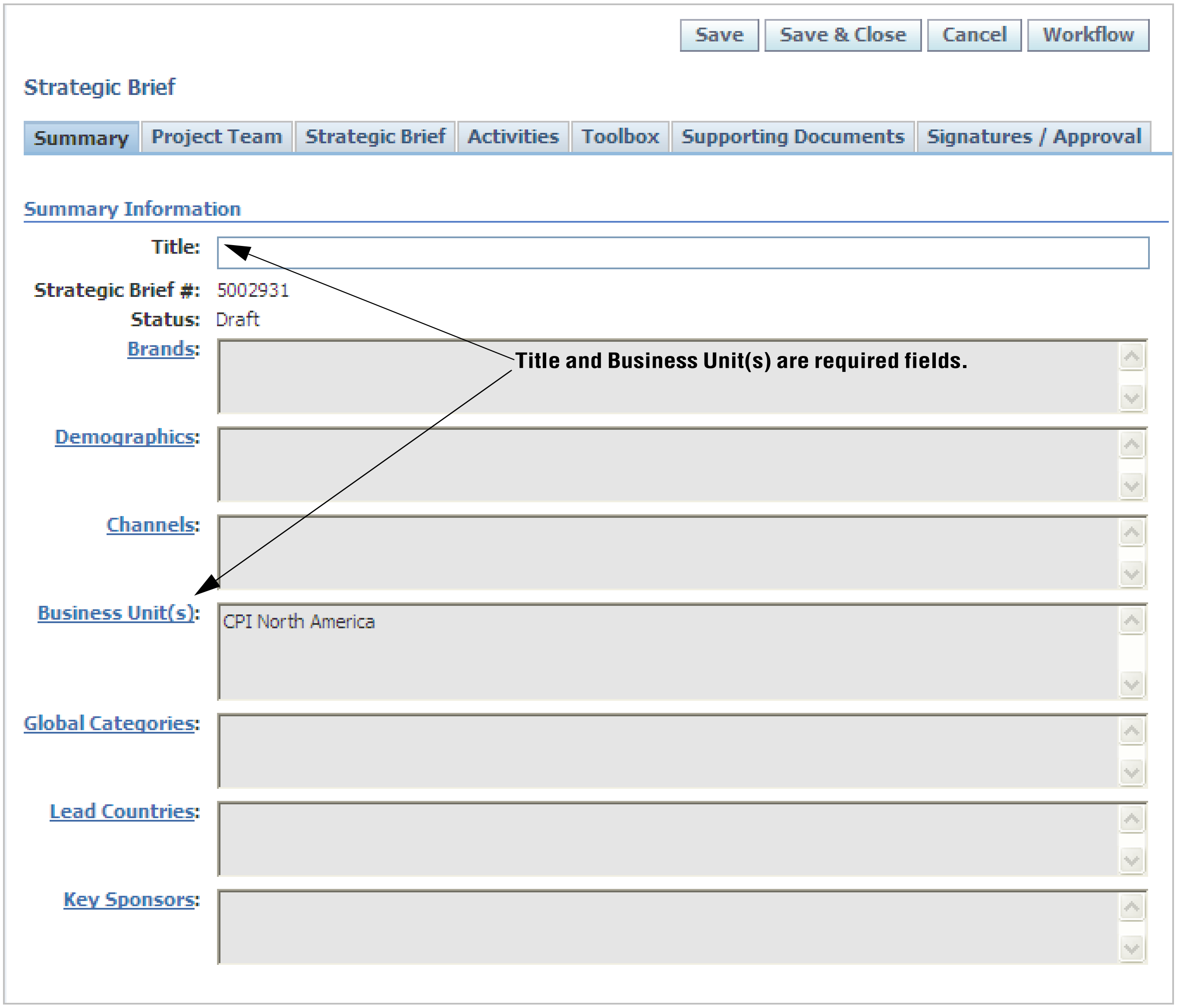


Figure 2-8 below shows the Strategic Brief page. It consists of the following tabs:

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

Figure 2-8: Strategic Brief page, Summary tab



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 template to use for this strategic brief. This is a required field.

Project Team Tab

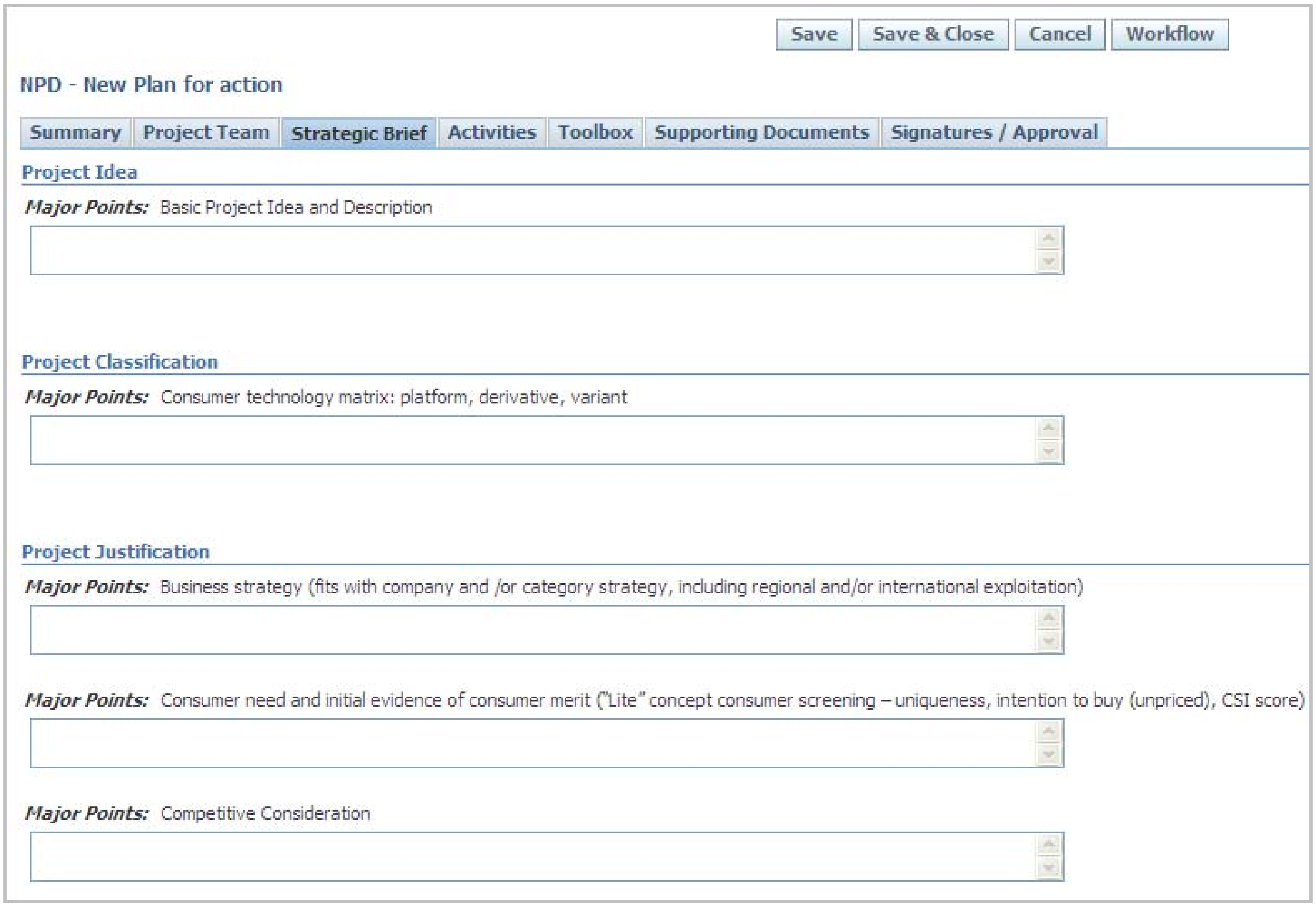
Use this tab, shown in figure 2-9 below, to define the project team. Refer to *Team Member Formulation Requirements Section* on page 2-4 page for more information on using this page.

Figure 2-9: Project Team tab

Strategic Brief Tab

Use the Strategic Brief tab, shown in figure 2-10 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 2-10: Strategic Brief tab



Activities Tab

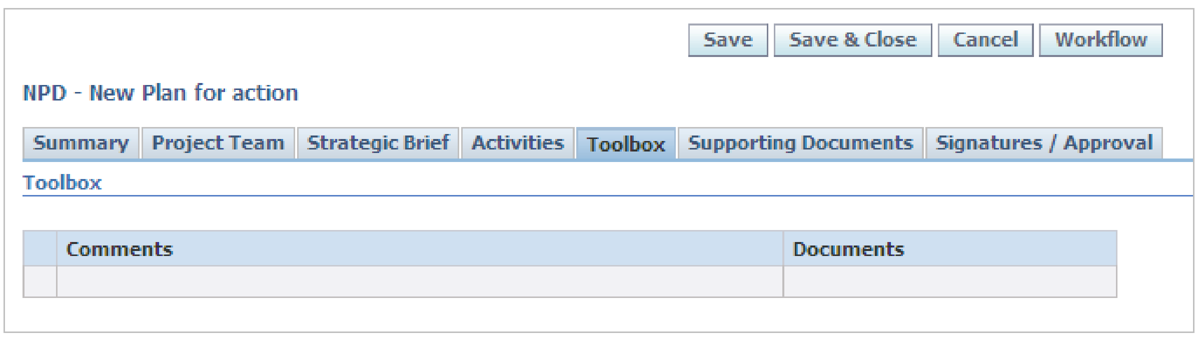
The Activities tab, shown in figure 2-11 below, displays activities tied to the strategic brief, such as signature document requests.

Figure 2-11: Activities tab

Toolbox Tab

Use the Toolbox tab to attach business documents that will be used as templates, as figure 2-12 shows below. You can download these documents, populate the document with information related to the specific strategic brief, and then attach the updated document on the Supporting Documents tab.

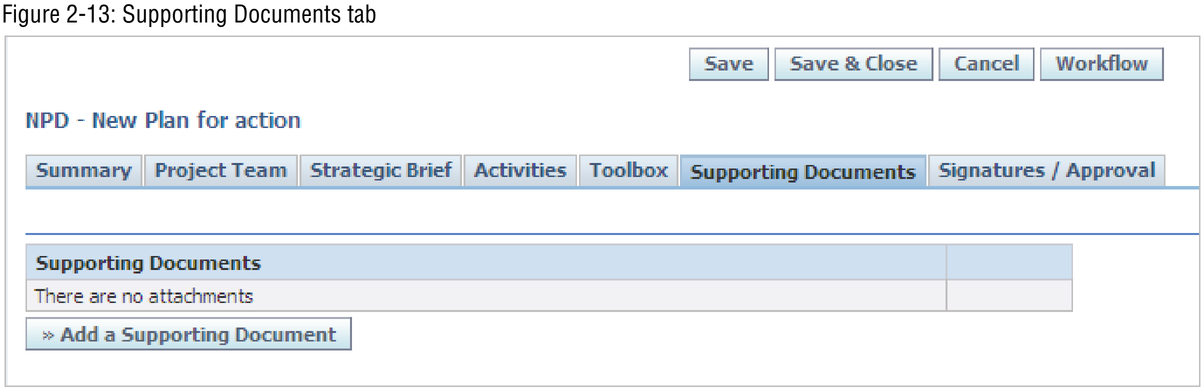
Figure 2-12: Toolbox tab



Supporting Documents Tab

Use this tab to attach documents to the strategic brief.

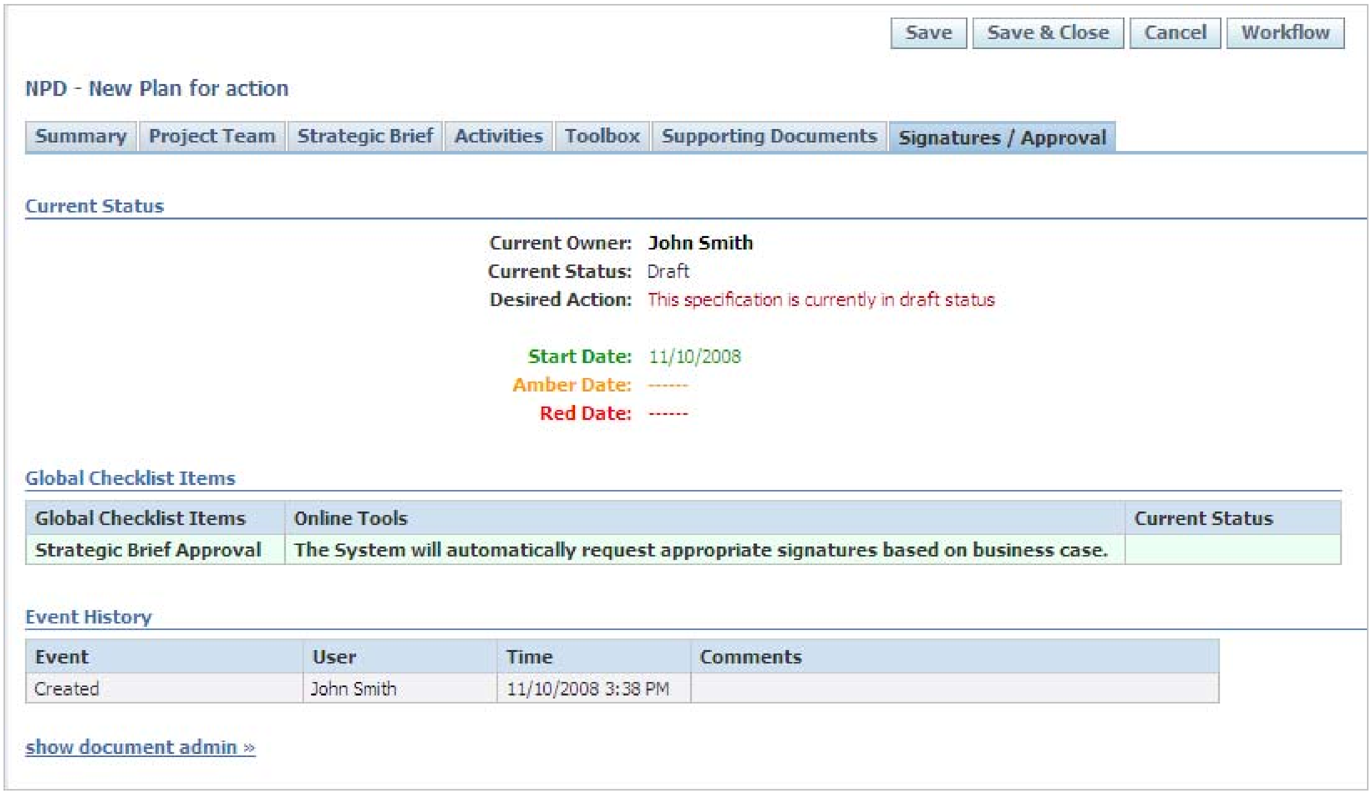
Figure 2-13: Supporting Documents tab



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 2-14: Signatures/Approval tab



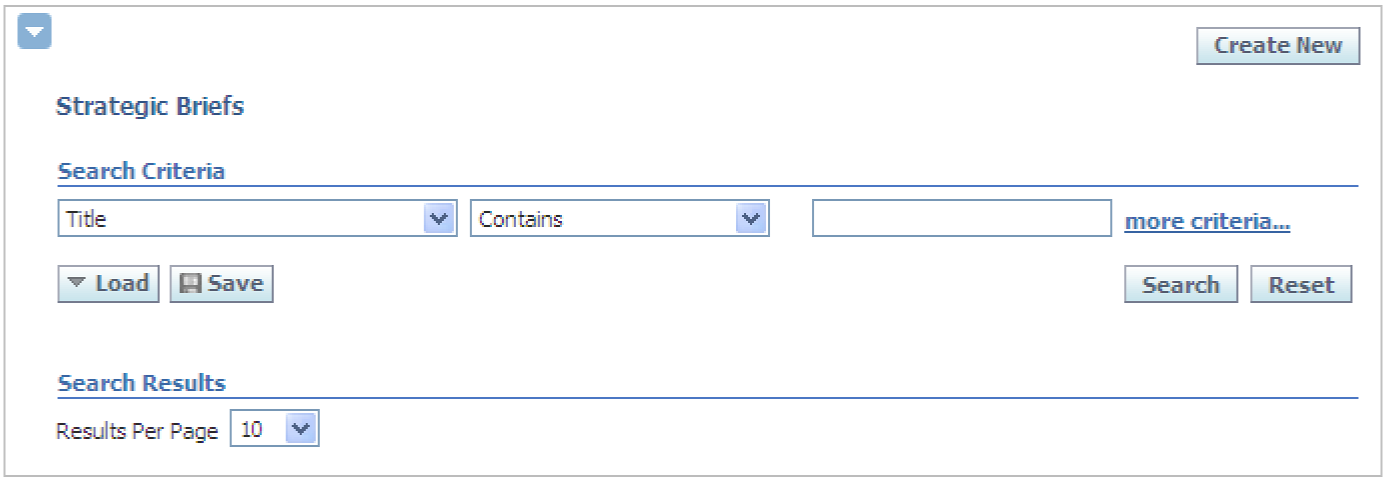
Working with Strategic Briefs

Searching for Strategic Briefs

To search for a strategic brief:

1. Click the **New Product Development > Strategic Briefs** link in the left navigation panel. The Strategic Briefs search page displays, as figure 2-15 shows:

Figure 2-15: Strategic Briefs search 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 NPD 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 the **Toolbox** tab.
18 Download a document as needed. There are no required fields.
19 Click on **Supporting Documents** tab.
20 Click on the **Add a Supporting Document** link to attach documents, as needed.
21 Click **Save.**
22 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

Companies use metrics as financial measurements to assess, plan, and implement projects. Metrics cover a wide range of financial factors and are often captured in Excel spreadsheets. Examples include financial models, projected sales goals, and pricing structures.

In NPD, you can use metrics to collect financial data and track the progress of projects, activities, ideas (via 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 from an existing Excel spreadsheet.

The following dimensions are used with metrics to further define measurements:

Basis—Captures revenue using an incremental or absolute accounting basis.

Phase—Captures measurements over multiple stages of a product's lifecycle. For example, Stage 1 of a project may contain sales data based on projected sales goals, but after the project progresses to Stage 4, real sales data is available. The phase comparison creates a snapshot comparison of the two stages.

Fiscal Year—Captures measurements in past, present, and future fiscal years. For example, a company may create a new product similar to one that was implemented a year ago. By analyzing product revenues of FY09, estimates can be made for FY10.

Basis and Phase Examples

Basis

This example assumes you want to track Sales Revenue estimates as a new product is being developed. An example of estimates follows:

Net Sales —2-Concept Qualification

Absolute	FY10 = $10,000	FY11 = $20,000	FY12 = $30,000
Incremental	FY10 = $10,000	FY11 = $10,000	FY12 = $10,000

In total, over the three periods, you are identifying that the new product will result in Net Sales of $30,000.

Marked as absolute, this metric represents a sum of values over time. It would be incorrect for a user to summarize the values as 10,000+20,000+30,000=60,000 because this has already been accounted for.

By marking the metric as incremental you are indicating that a given value represents the Net Sales for a given time period only.

Phase

The phase option allows you to capture changes in estimates based on phases in the project. The following example uses five stages that may match the project: 1—Ideation, 2—Concept Qualification, 3—Product Qualification, 4—Market Qualification, and 5—Launch.

Therefore you can capture more accurate data as the product is closer to launch without losing the initial estimates. Our Net Sales data may be presented as follows:

Net Sales —2-Concept Qualification

Absolute	FY10 = $10,000	FY11 = $20,000	FY12 = $30,000
Incremental	FY10 = $10,000	FY11 = $10,000	FY12 = $10,000

Net Sales —3-Product Qualification

Absolute	FY10 = $15,000	FY11 = $25,000	FY12 = $45,000
Incremental	FY10 = $15,000	FY11 = $10,000	FY12 = $20,000

Net Sales —4-Market Qualification

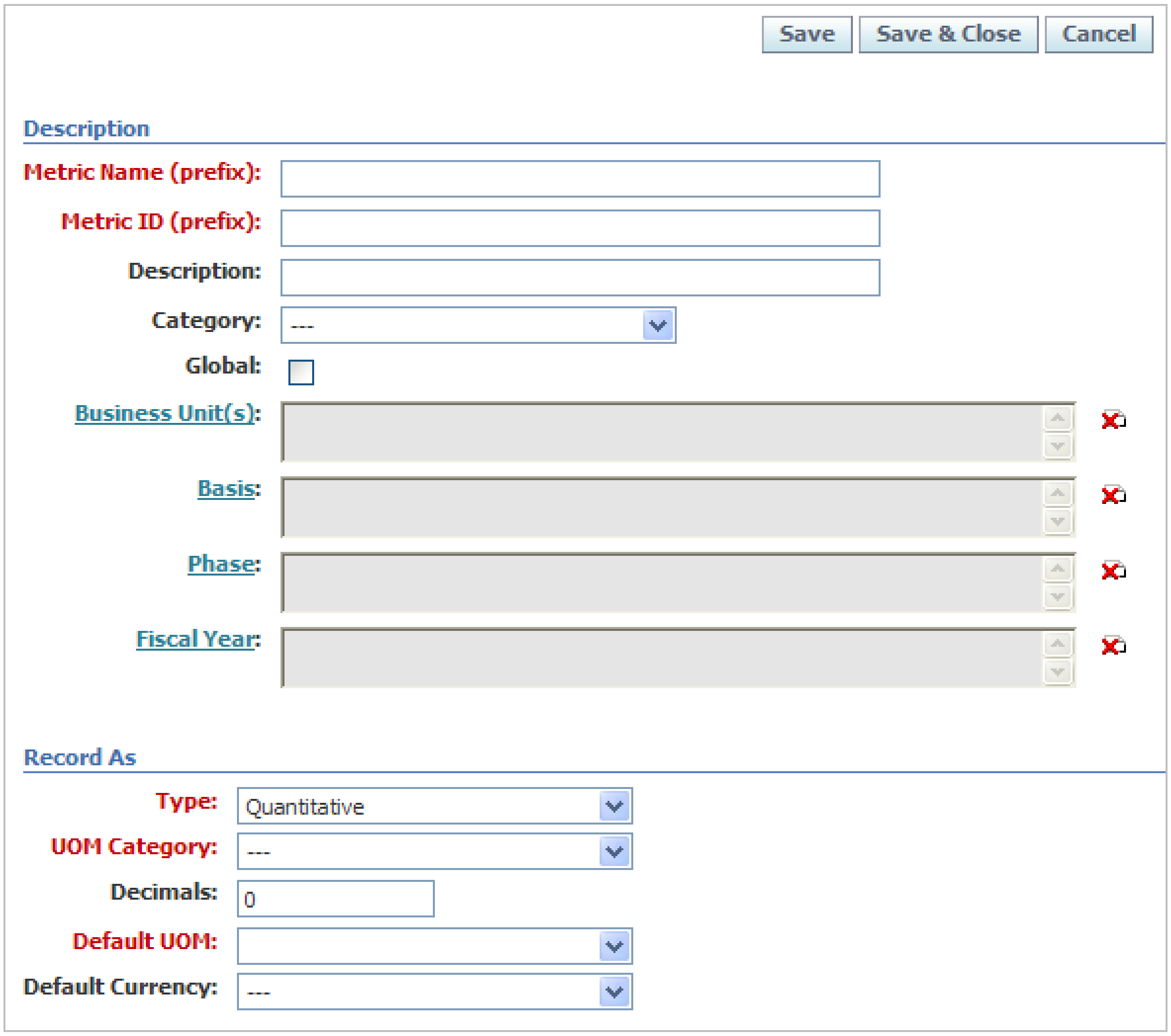
Absolute	FY10 = $5,000	FY11 = $15,000	FY12 = $30,000
Incremental	FY10 = $5,000	FY11 = $10,000	FY12 = $15,000

Creating Metrics

To create a new metric:

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

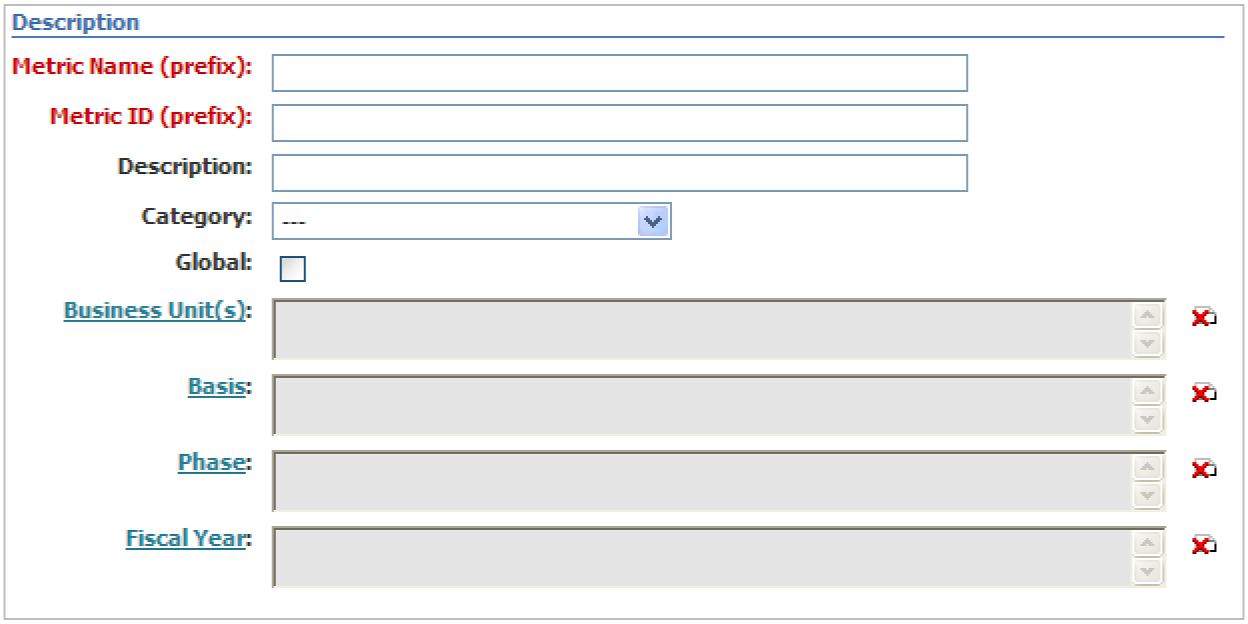
Figure 3-1: New metrics dialog box



Description Section

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

Figure 3-2: Description section



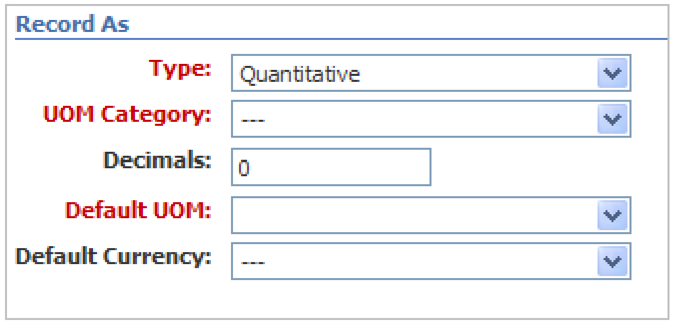
Key fields include:

- **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 idea (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 “FY09” and “FY10”, when you use this metric on a project the only options for Fiscal Year are “FY09” and “FY10”.

Record As Section

Use this section to define the data type for the metric, as figure 3-3 shows below. The choices made here will automatically load when the metric is attached to a project, activity, ISP, or portfolio.

Figure 3-3: Record As section



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.
- **Default Currency**—The currency associated with this metric.

3 Click **Save**.

Refer to *Project Templates* on page 5-30 and *Metrics Tab* on page 5-44 for more information on applying metrics to projects.

Refer to *Working with Metrics* on page 4-16 for more information on applying metrics to ISPs.

Refer to *Portfolio Management* on page 7-1 for more information on using metrics within portfolios.

CHAPTER 4

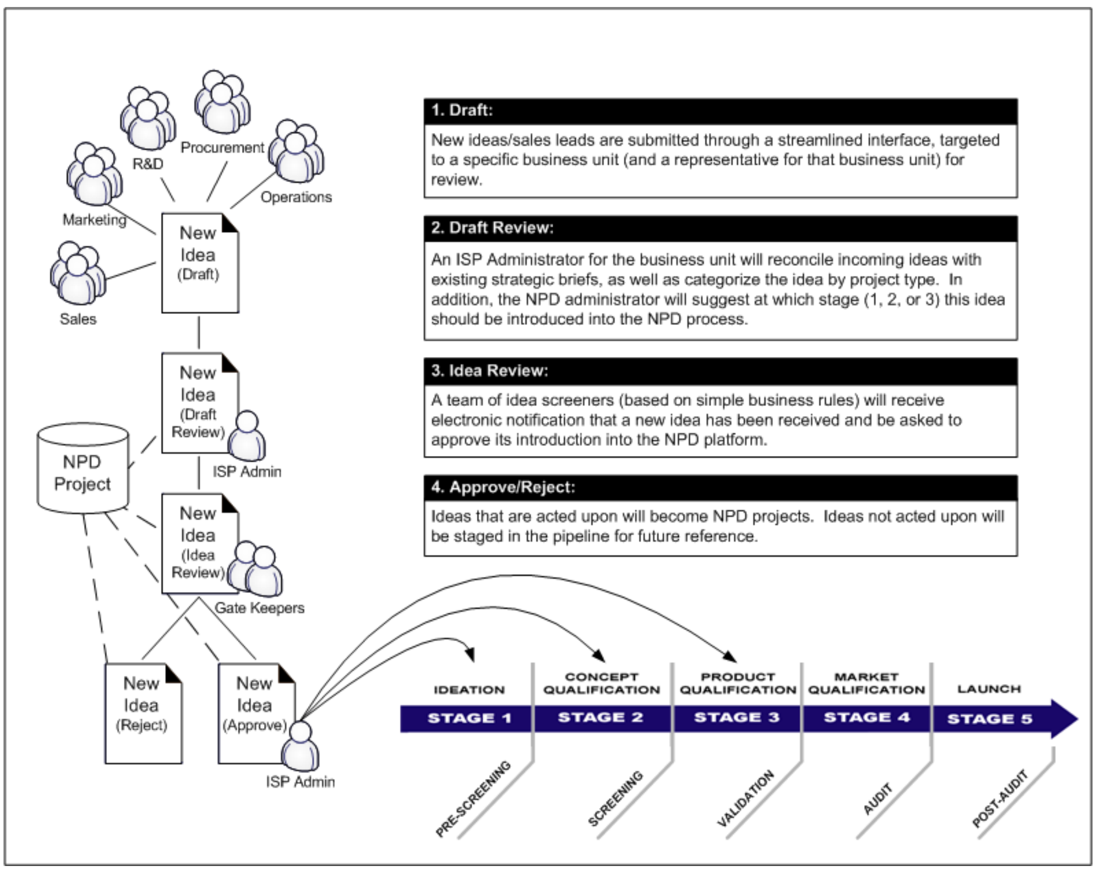
Using Innovation Sales Pipeline

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

Innovation 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 idea is pre-screened, linked to NPD as an ISP, and passed through a review process toward disposition.

Figure 4-1: Turning ideas into an ISP



Using Innovation 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. Agile PLM for Process displays the ISP Templates search page. Search for and select an ISP template.

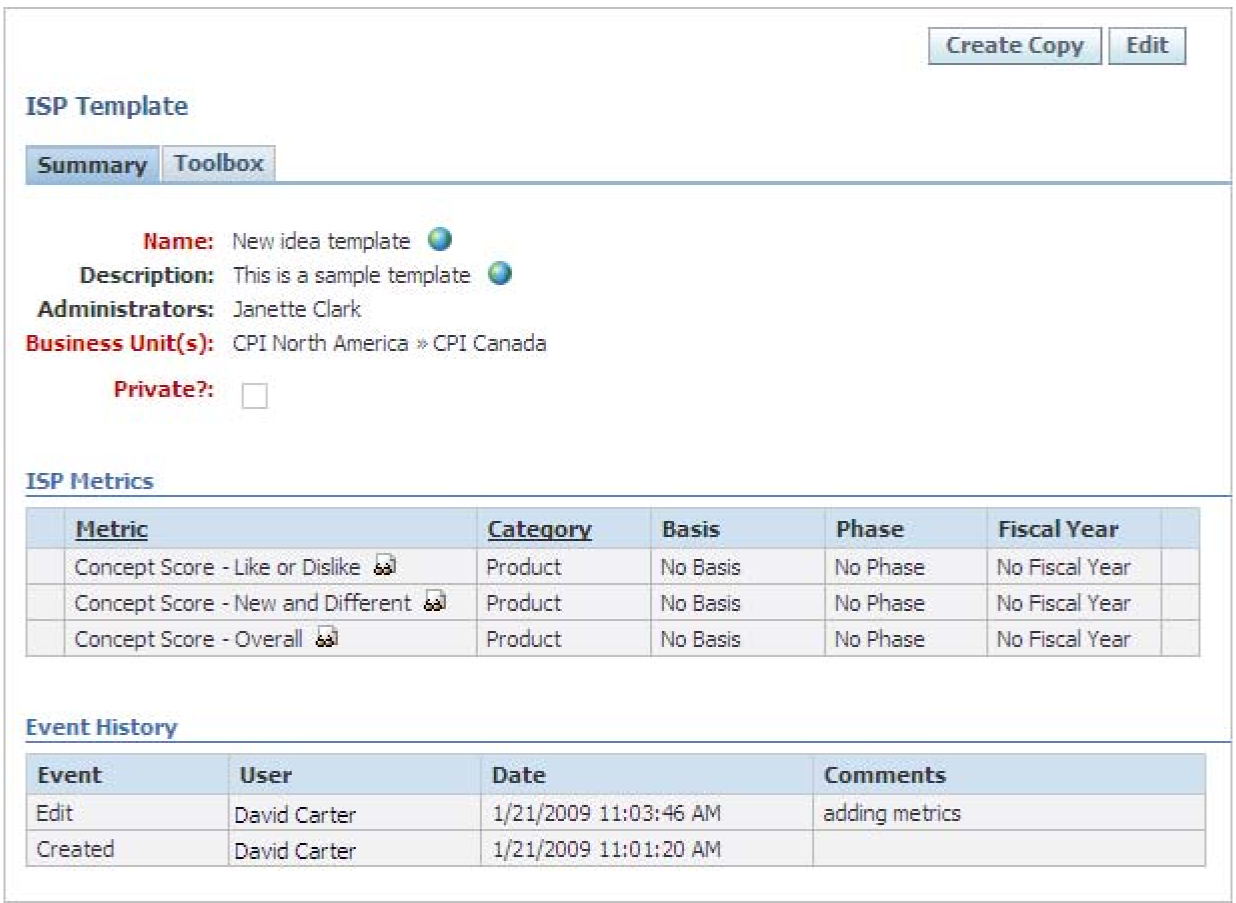
The ISP Template page consists of two tabs: Summary and Toolbox. For detailed instructions on creating an ISP, see *Creating an ISP* on page 4-8.

Summary Tab

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

- Header
- ISP Metrics
- Event History

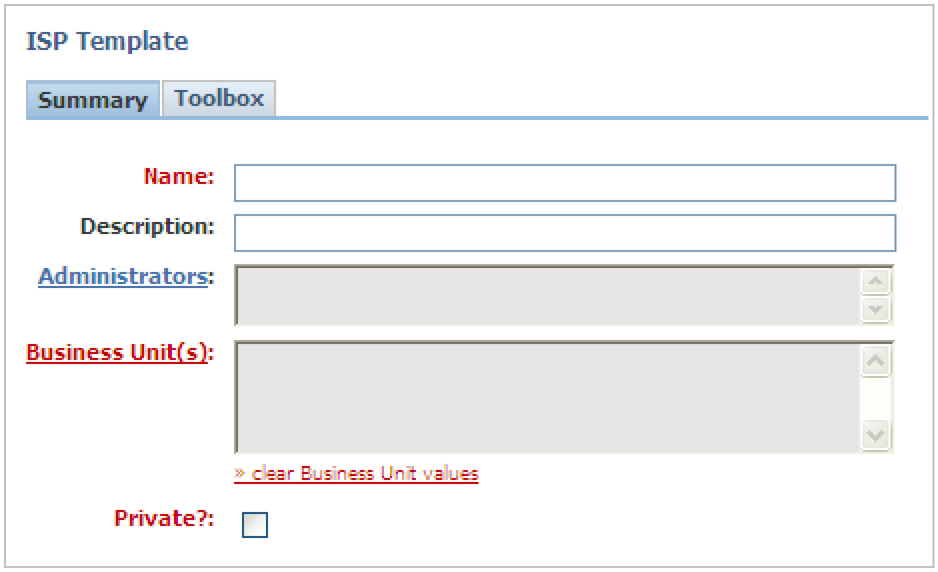
Figure 4-2: Summary tab



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



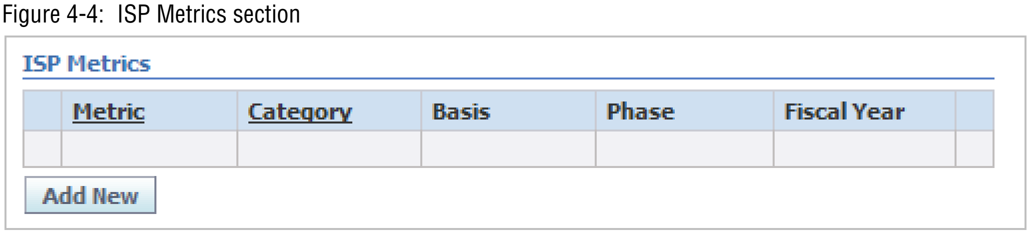
Key fields include:

- **Name**— Name 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

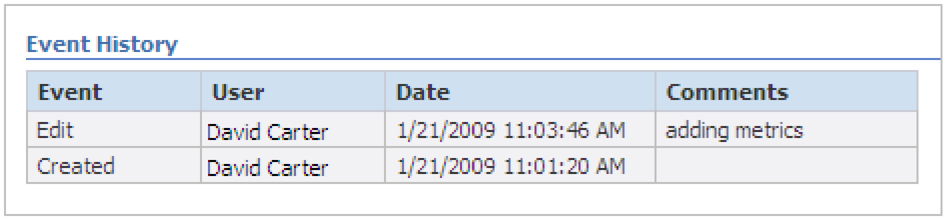


To add a metric click **Add New**. This opens a metric search page. Search and select the metric to add. Refer to *Using Metrics* on page 3-1 for more information.

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



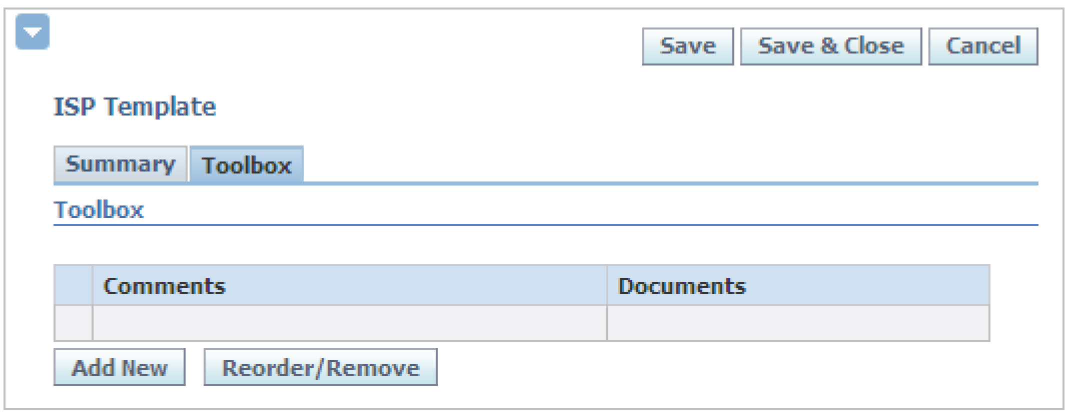
Event History

Event	User	Date	Comments
Edit	David Carter	1/21/2009 11:03:46 AM	adding metrics
Created	David Carter	1/21/2009 11:01:20 AM	

Toolbox Tab

Use the Toolbox tab to attach businesses ideation templates. Add items by clicking **Add New**. You can remove or reorder items by clicking **Reorder/Remove**.

Figure 4-6: Toolbox tab

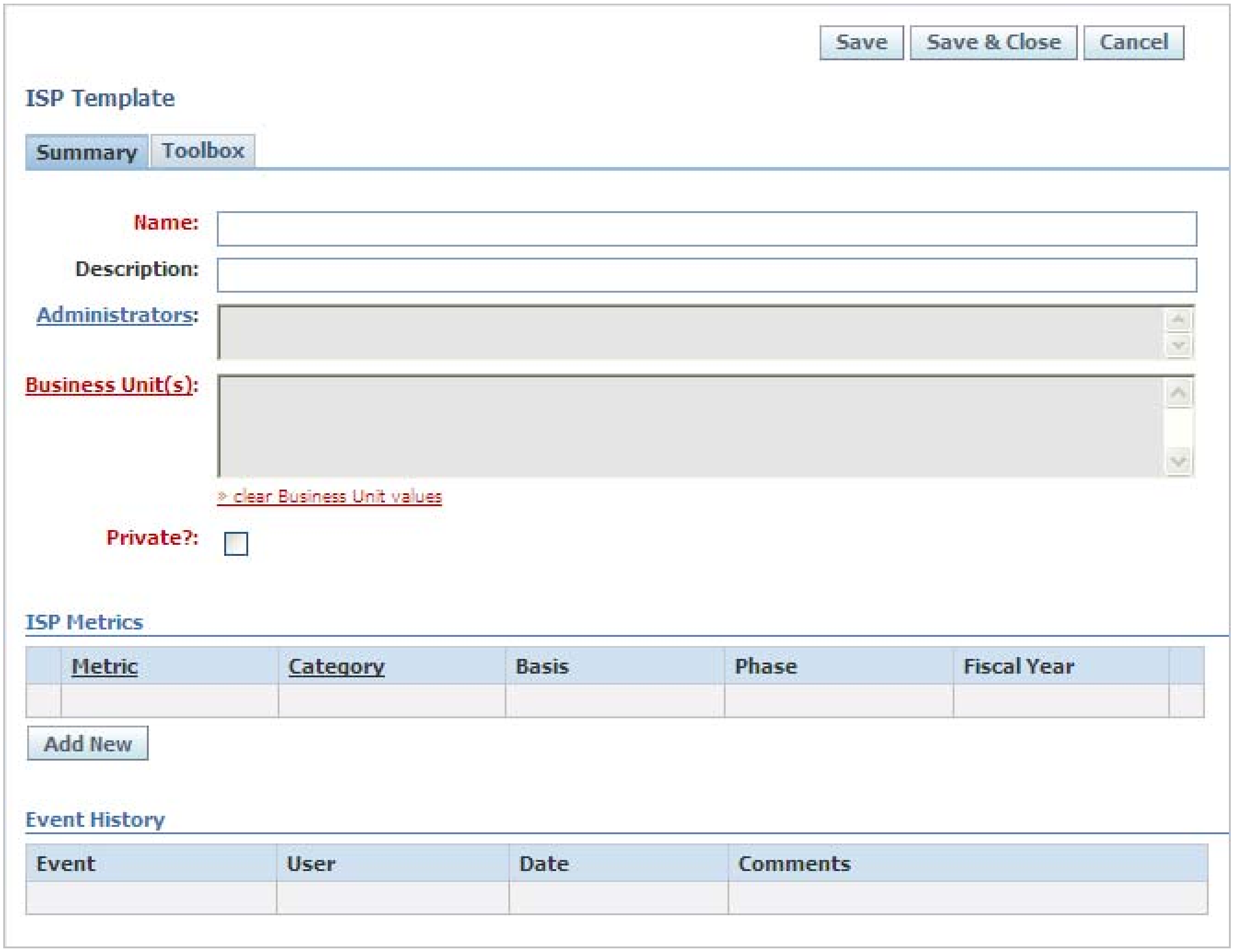


Creating a New ISP Template

To create a new ISP template:

1. Click the **Templates > ISP Templates** link in the left navigation panel. Agile PLM for Process displays the ISP Templates search page.
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



3. Fill out the Summary tab as described on page 4-3 through page 4-4.
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 statuses, as defined below.

Draft Status

This is the starting status 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 Status

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 Status

During this status, 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 Status

In this status, 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.

Rejected Status

At any point in the workflow, if an idea is deemed infeasible or the company chooses to not move forward with the concept, the ISP can be moved into the Rejected status. While the ISP is in this status, it cannot be edited. Later, if the decision makers determine the idea has merit, the ISP can be workflowed from “Rejected” to “Draft” and restart the approval process.

Using Innovation Sales Pipelines

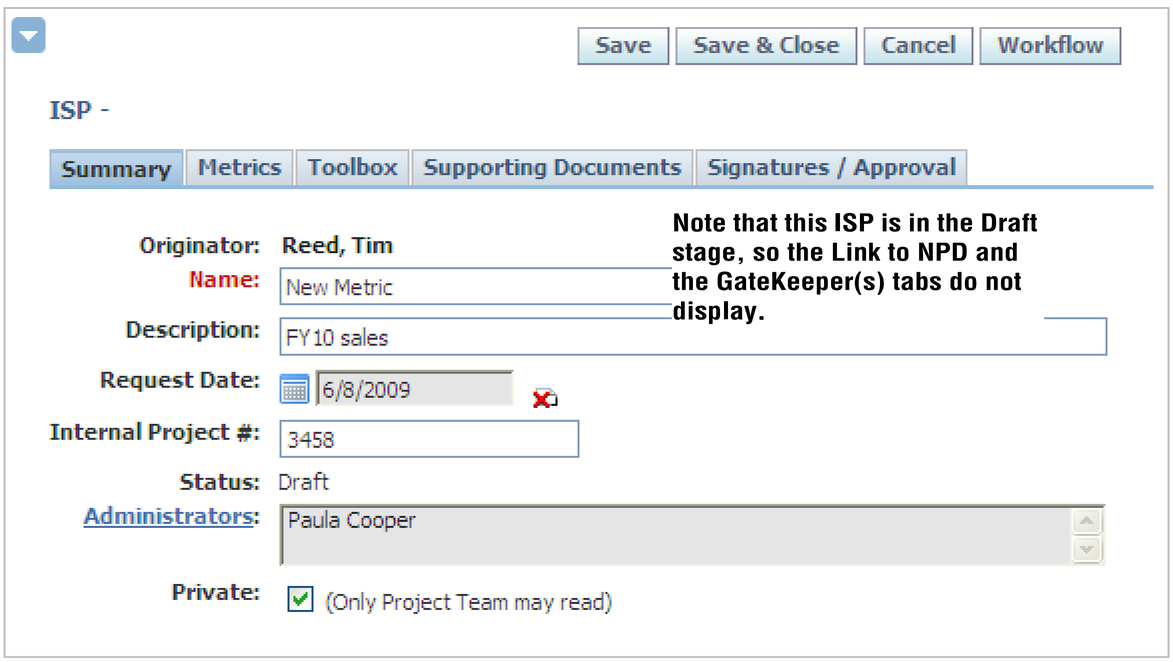
Creating an ISP

To create an ISP:

1. Click **New Product Development > Innovations/Sales Pipeline** from the left navigation panel. Agile PLM for Process displays the ISPs search page.
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 **Name** field (required).
5. Click **Done**.
6. Click **Save** or **Save & Close**.

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



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

Use the Summary tab to define the ISP. Figure 4-8 on page 4-8 shows the Summary tab.

Header Section

Key fields in the Header section include:

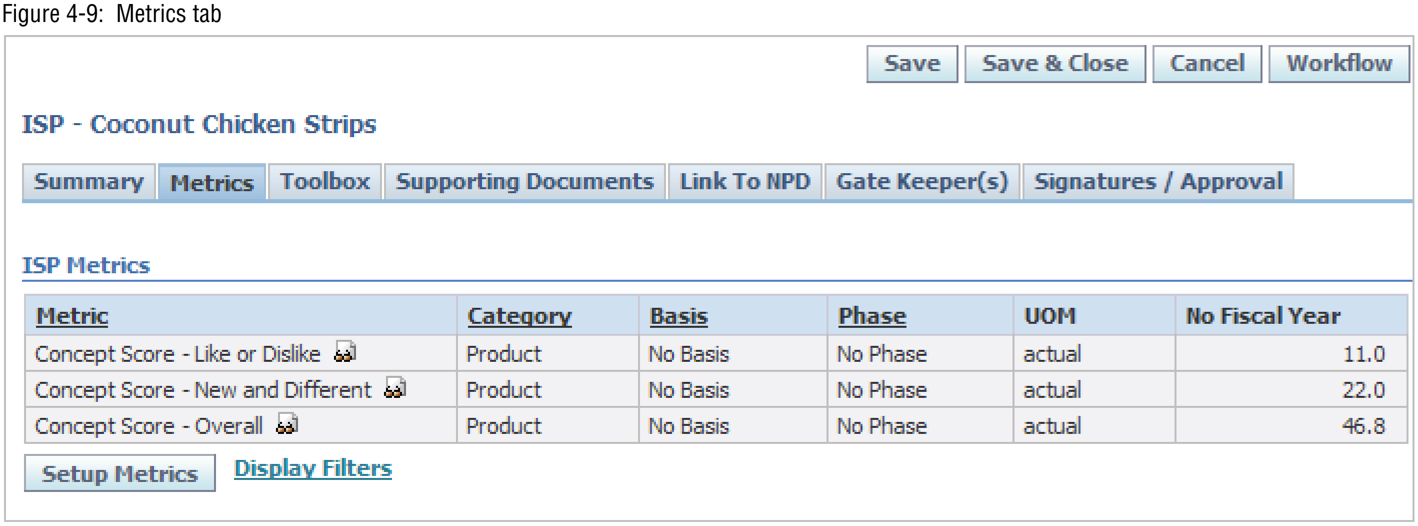
- **Originator**—This field is auto-populated with the name of the user who created the ISP.
- **Name**—The name of the ISP. This is a required field.
- **Status**—The current status of the ISP. See *Understanding the ISP Lifecycle* on page 4-7 for more details.
- **Administrators**—The names of administrators 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

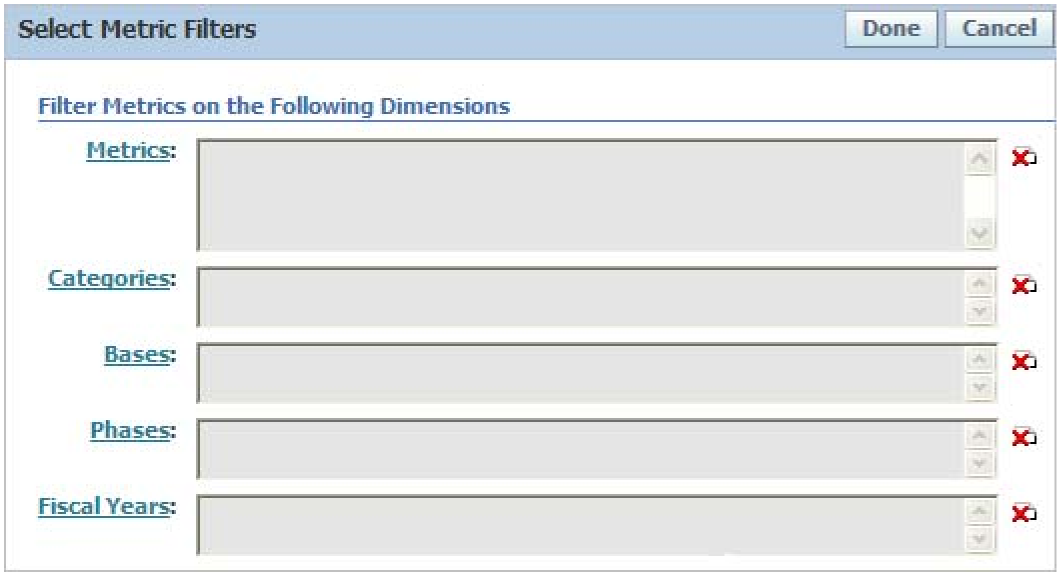


Filtering Metrics

To filter the list of metrics displayed:

1 Click the **Display Filters** link. The Select Metric Filters 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.

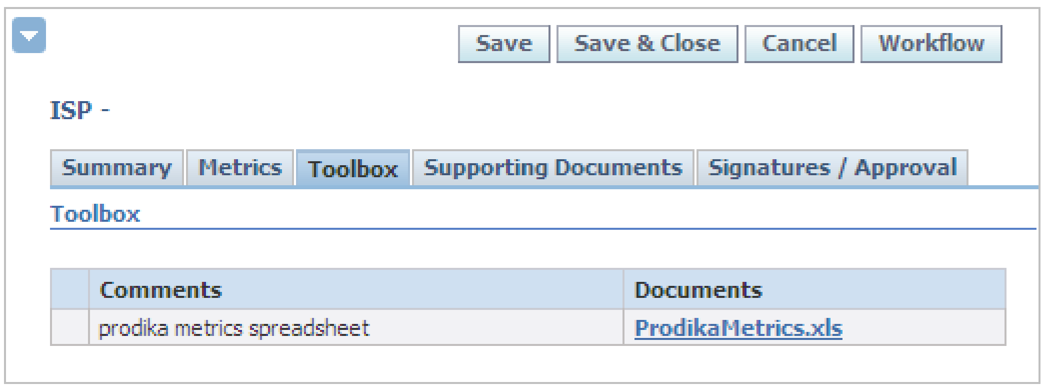
Figure 4-11: Metrics tab in edit mode

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

Use the Toolbox tab to attach business documents that will be used as templates, as figure 4-12 shows below. You can download these documents, populate the document with information related to the specific ISP, and then attach the updated document on the Supporting Documents tab.

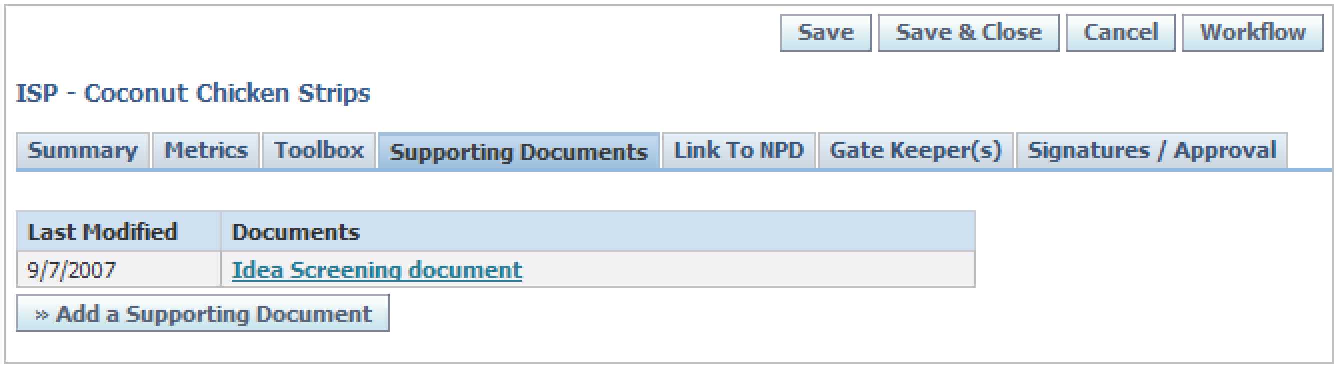
Figure 4-12: Toolbox tab



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

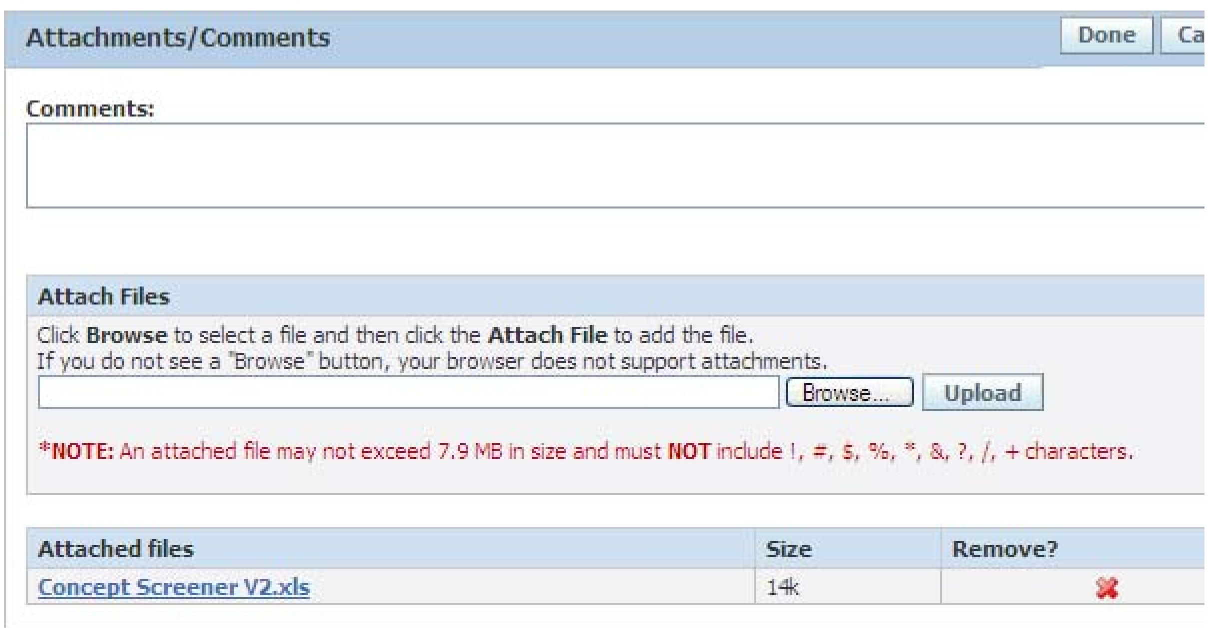


Adding a Document

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



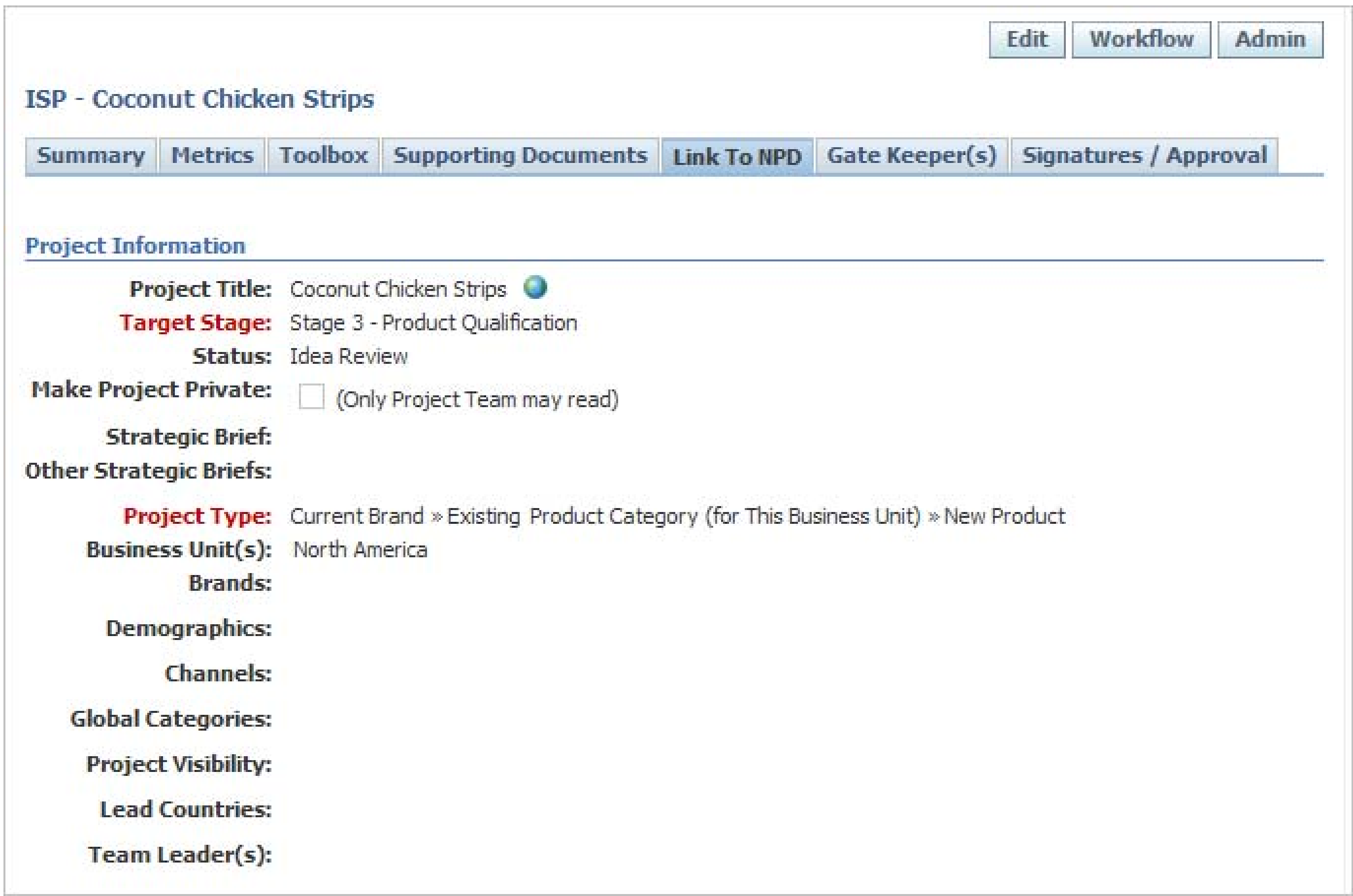
2. Upload attachments by clicking **Browse** to locate and select the file, then click **Upload**. The document displays in the Attached files section.
3. Enter a name for the document in the **Comments** field.
4. Click **Save**.

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 4-15: Link to NPD tab



Key fields include:

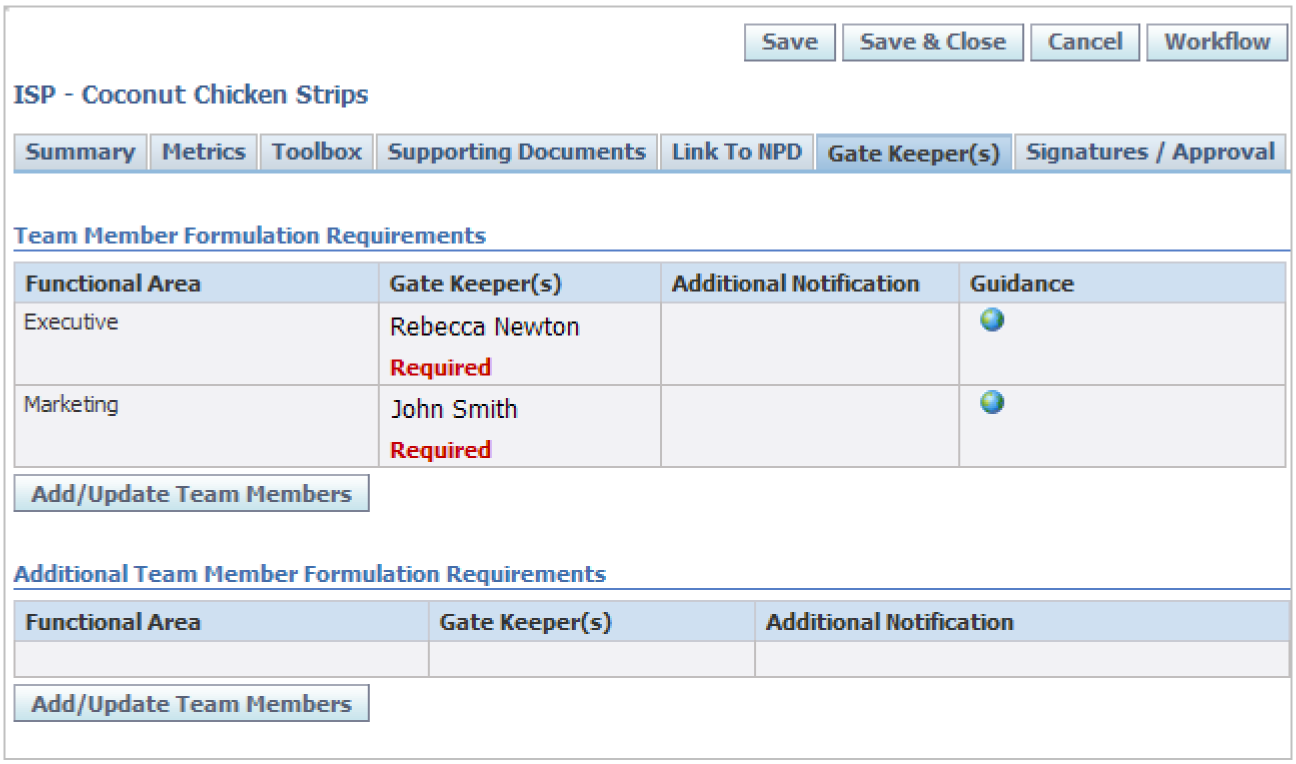
- **Project Title**—The name of the project. You can change the name of the project at any stage except for Approved.
- **Target Stage**—The stage where the project starts after the ISP is completed. This is a required field.
- **Strategic Brief**—The strategic brief that the project is based on.
- **Project 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.

Gate Keeper(s) Tab

Use the Gate Keeper(s) tab to define the TMFRs for the ISP. As figure 4-16 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 4-16: Gate Keepers tab



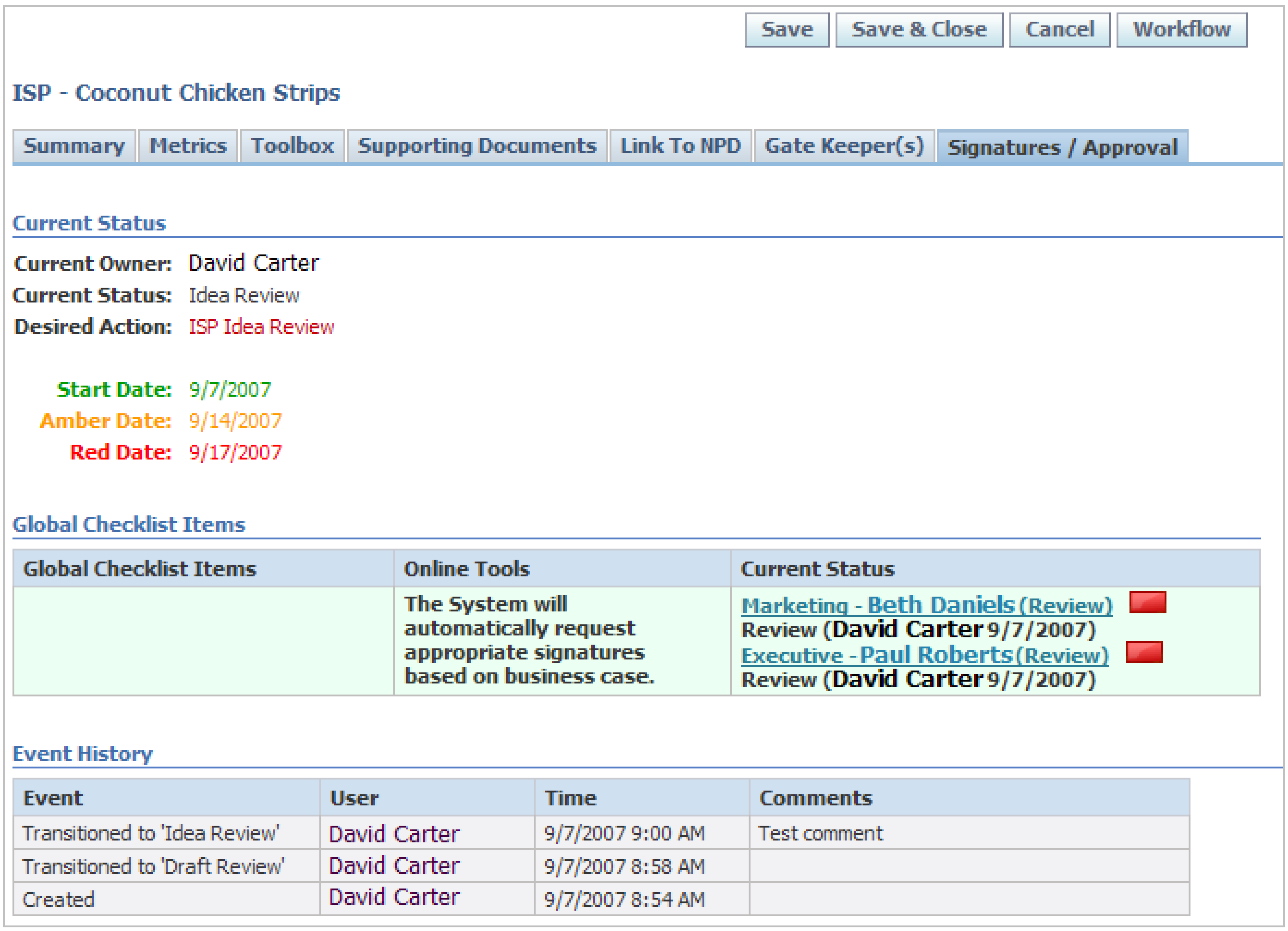
Refer to *Team Member Formulation Requirements Section* on page 2-4 for more information on TMFR fields.

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



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

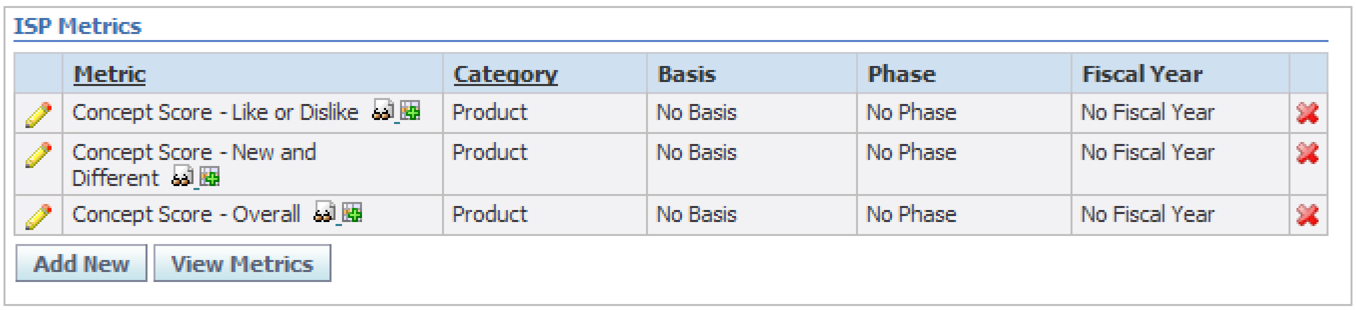
Adding Metrics to an ISP

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

To manually add metrics:

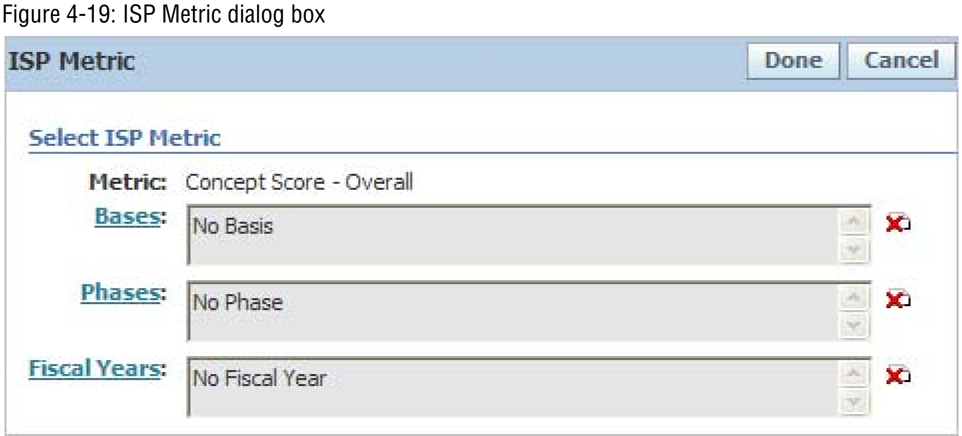
1. Open an ISP that is not in an "Approved" stage.
2. Click the **Metrics** tab.
3. Click **Edit**.
4. Click **Setup Metrics** under the ISP Metrics table. An **Add New** button is displayed.
5. Click **Add New**. A metric search page is displayed.
6. Search for the metrics to add.
7. Select the metrics.
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



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



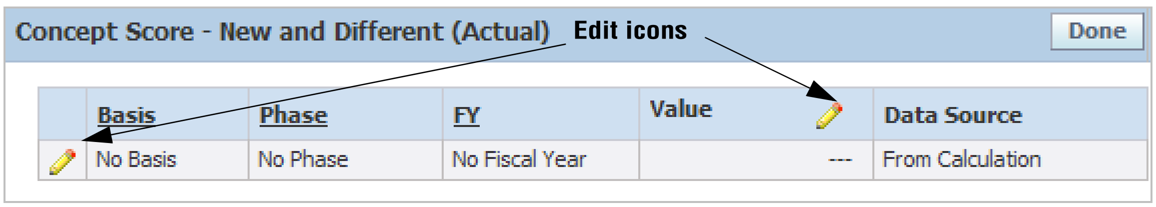
11. Click **Done**. The dialog box closes, and the metric row reflects the changes that you made.
12. Click **View Metrics**.
13. Click **Save**.

Manually Editing Metric Values

To manually edit metric values:

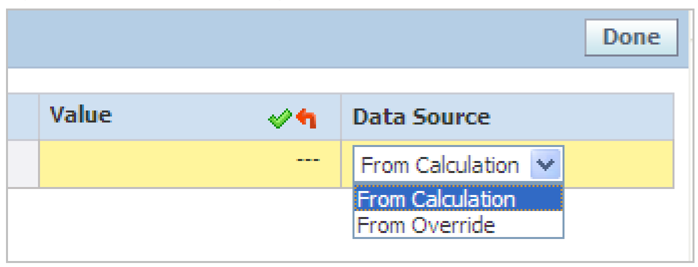
1. Open an ISP that is not in an “Approved” stage.
2. Click the **Metrics** tab.
3. Click **Edit**.
4. Click the **Setup Metrics** button under the ISP Metrics table.
5. Click the edit icon ( ) on the row of the metric that you want to edit.
6. Click the add metric values icon ( ) in the Metric column. The edit metrics dialog box is displayed, as figure 4-20 shows below:

Figure 4-20: A metrics



7. Click one of the edit icons, either on the column or row. The **Data Source** column becomes a drop-down list, as figure 4-21 shows below.

Figure 4-21: Data Source 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 “Approved” 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 4-22 shows below:

Figure 4-22: Selected Metrics dialog box

Selected Metrics

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

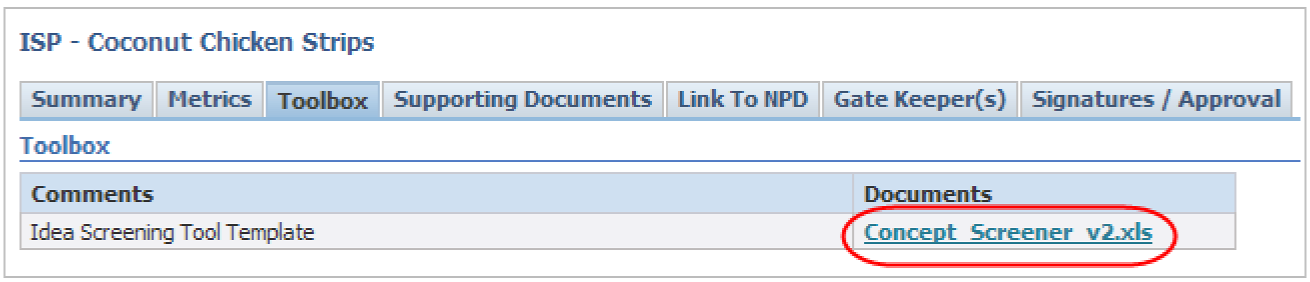
4 Review the ID field, which contains the ID of the metric corresponding to the basis, phase, and fiscal year.

5 Click **Done**.

Importing Metrics from Excel

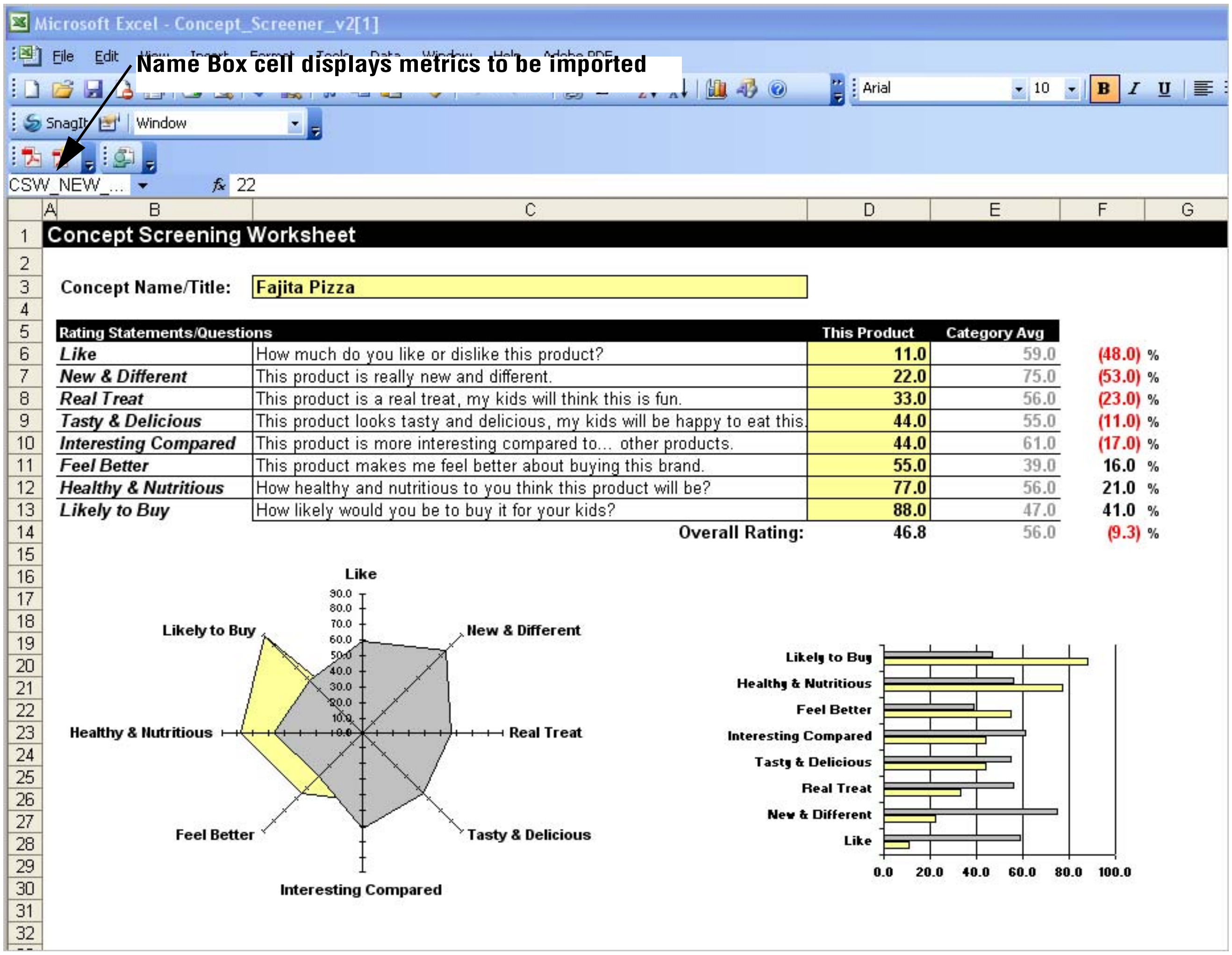
You can import metrics from an Excel spreadsheet. The Documents field in the Toolbox tab, shown in figure 4-23 below, might contain a spreadsheet that can be used to upload certain metrics.

Figure 4-23: 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 4-24 below shows a sample spreadsheet.

Figure 4-24: 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**.

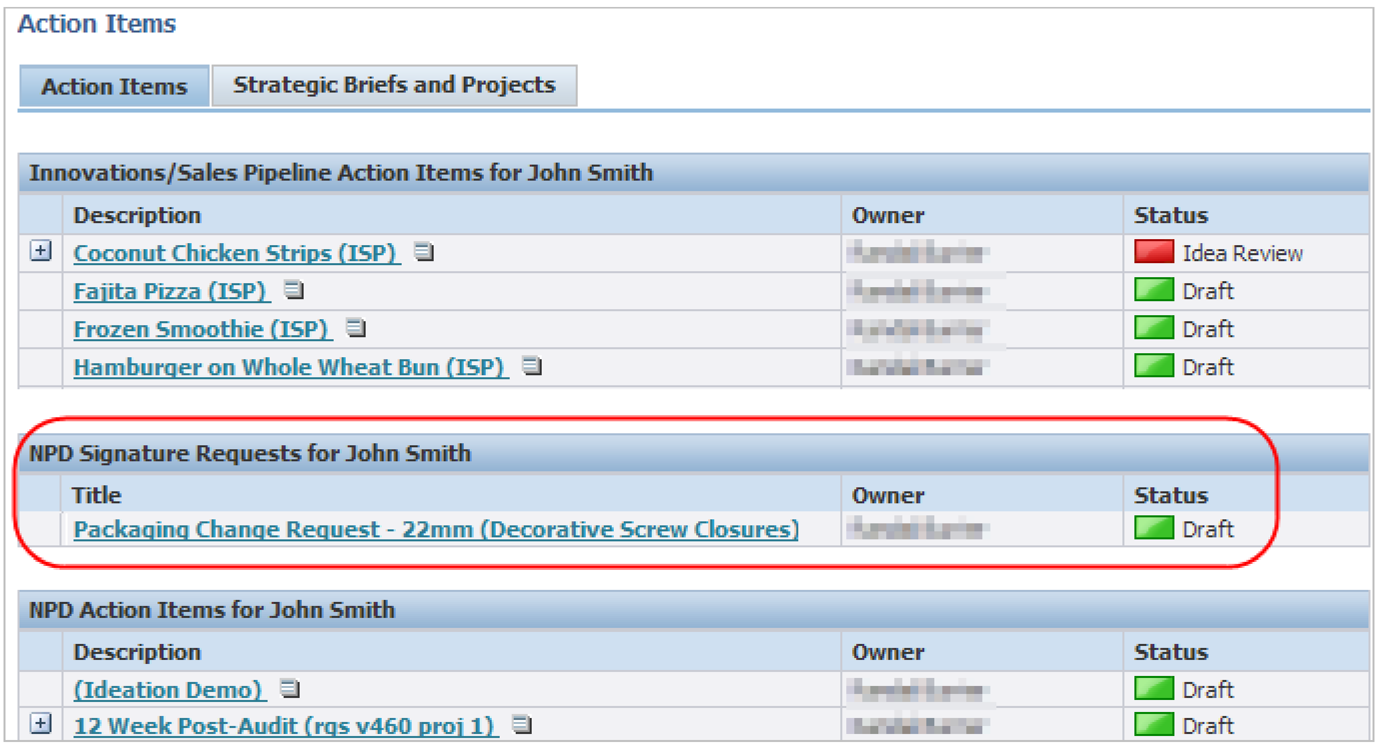
13 Click the **Metrics** tab. The values in the FY*xx* columns reflect the data that was imported.

Performing Other ISP Activities

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:

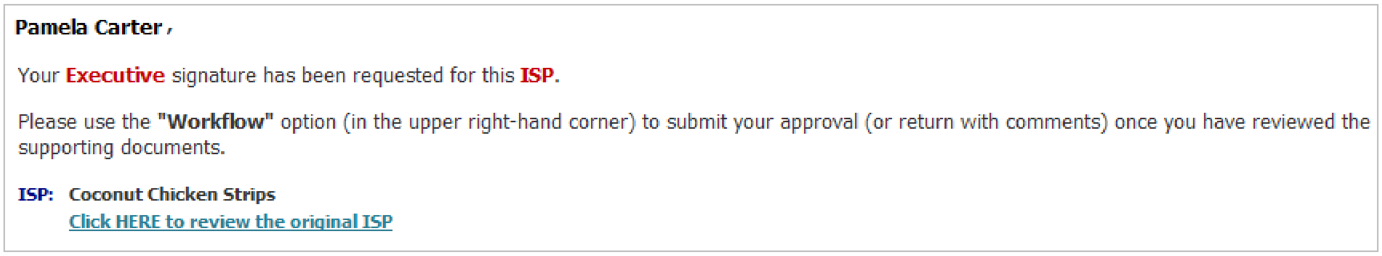
Figure 4-25: Signature request action items



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



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

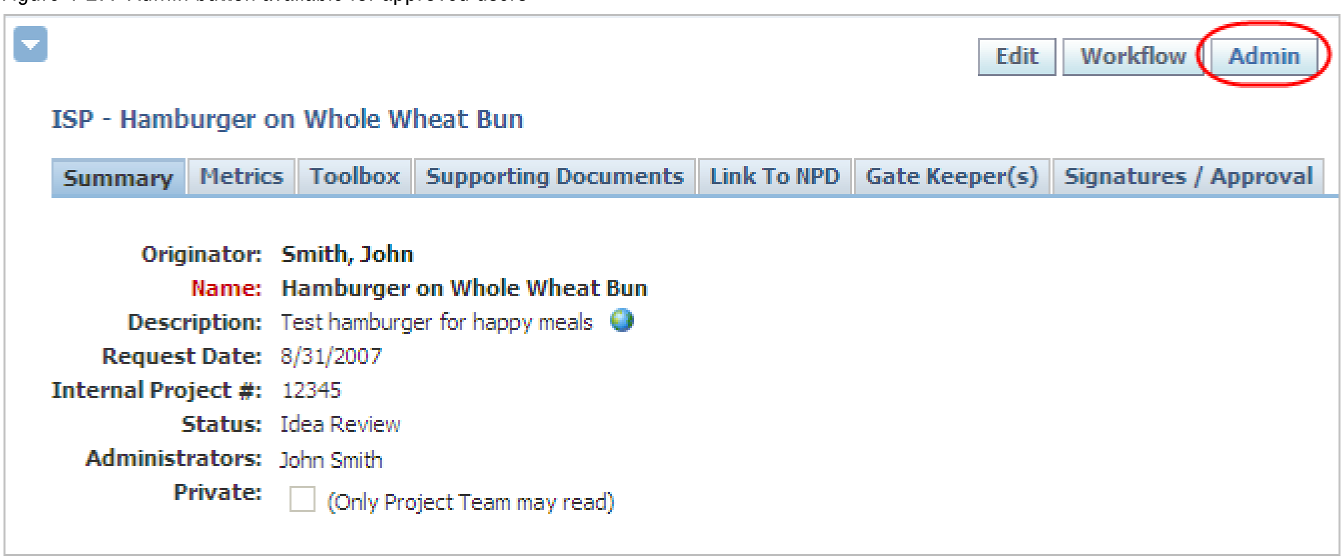
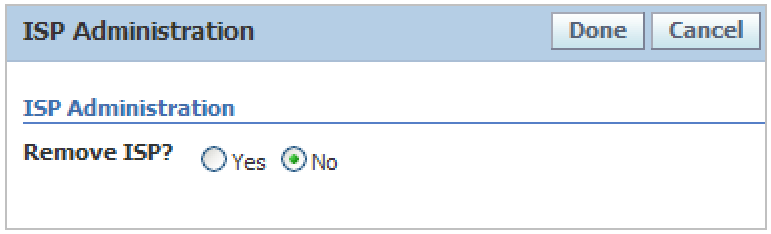


Figure 4-28: ISP Administration dialog box



3 Click **Yes** in the Remove ISP field.

4 Click **Done**. The ISP will be deleted from NPD.

CHAPTER 5

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 workflow process made up of stages and gates. 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 bodies of work performed within one or many stages in a 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

Every stage in the workflow will maintain a collection of attached documents. This feature allows 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 and the Historical Attachments/Comments section.

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

Editing a Document

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

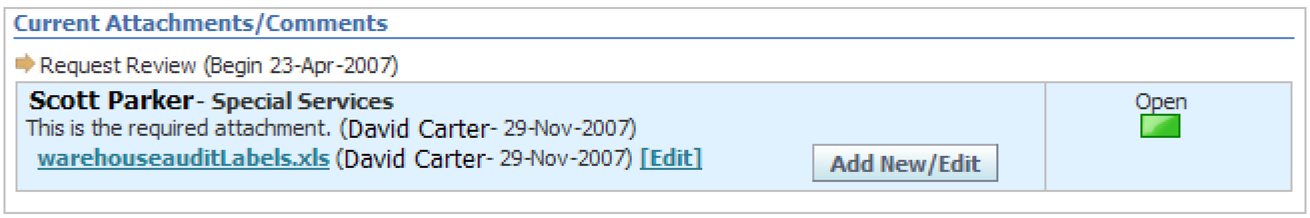
1. Open a document collaboration activity by opening a project that contains one, or if you received a notification email for this activity, click the enclosed link which will take you directly to the activity once you have logged in.
2. If there is a document that you would like to edit that was previously 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:

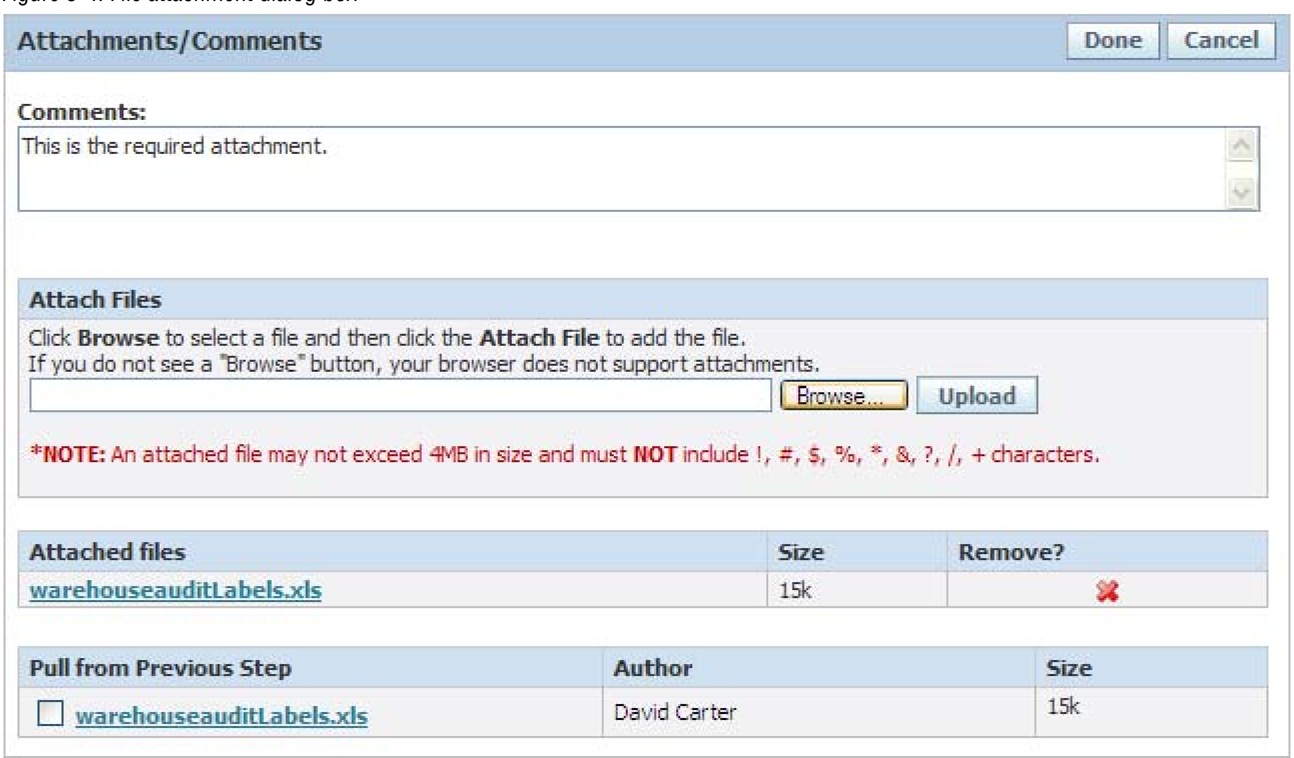
1. Open a document collaboration activity by opening an action item or a project that contains one, or if you received a notification email for this activity, click the enclosed link which will take you directly to the activity once you have logged in.
2. If you are the owner or reviewer, click **Add 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



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

Figure 5-4: File attachment dialog box



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 4-16.

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.

Note that Office 2007 extensions are not supported with NPD in-place editing.

Project Schedule Activity Type

The Project Schedule Activity Type is the primary tool for users to establish and track progress for stages, gates, and other activities. The project schedule supports the following business processes:

1. Establish Project Schedules Using Template Values—A project template allows users to identify standard activities that should be tracked and define general durations for stages, gates, and the fore mentioned activities. The basic interaction with the template is as follows:
   - When the initial project schedule is created, the activities defined on the project template are immediately inherited on the Project Schedule instance.
   - The user then enters the Planned In-Market Launch Date and then clicks the **Est. Date** column heading. The project schedule establishes the planned dates using the durations inherited from the project template.
   - From there the user will make adjustments to accurately reflect the schedule based on specific knowledge of the project they are managing.
2. Manage the Project Schedule Approval Process—Once the schedule has been established it can be verified and confirmed through workflow approvals.

   When the project schedule is approved and reaches a terminal status, it then becomes the current project schedule. The current project schedule presents data in other areas of NPD:
   - Project On a Page
   - NPD Portfolios
   - Service Level Agreements
3. Tracking Daily Progress—The project schedule acts as a dashboard for tracking progress throughout the project life cycle. As stages, gates, and custom milestone activities naturally begin and end the workflow, information is consolidated and presented for review. In addition green and red indicators provide guidance regarding whether a given item is on track or is late and may need attention.
4. Capturing Changes To The Project Schedule—As the project progresses, it is inevitable that changes to the schedule will be needed. Changes include:
   - Adjustments to the planned begin and/or end dates
   - Adding custom milestones to be tracked
   - Entering actual dates for Stage 1 Start and In-Market Launch

   In each of these examples, the proper process for managing the change is to create a new instance of the project schedule, make the appropriate updates, workflow the schedule to the appropriate approvers, and place the project schedule in a terminal status establishing it as the current project schedule. Therefore if you updated the project schedule at the beginning of each stage of a five stage project, you would end up with five instances of the project schedule activity.

By following this process you will be able to review and monitor how the project's planned timeline changes throughout the life of the project.

Global Milestones

Global milestones capture and present date and duration information related to stages, gates, and the In-Market Launch Date. 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		Start			End			Duration		Comments
		Planned	Actual	RAG	Planned	Actual	RAG	Planned	Actual	
1	Discover	01-Jul-2010	14-May-2010		29-Jul-2010	17-May-2010		28	3	
	Discover Gate	29-Jul-2010	17-May-2010		31-Jul-2010	17-May-2010		2	0	
2	Design	31-Jul-2010	17-May-2010		18-Aug-2010	17-May-2010		18	0	
	Design Gate	18-Aug-2010	17-May-2010		20-Aug-2010	17-May-2010		2	0	
3	Qualify	20-Aug-2010	17-May-2010		17-Sep-2010	17-May-2010		28	0	
	Qualify Gate	17-Sep-2010	17-May-2010		19-Sep-2010			2		
4	Ready	19-Sep-2010			07-Oct-2010			18		
	Ready Gate	07-Oct-2010			09-Oct-2010			2		
5	Launch	09-Oct-2010			18-Nov-2010			40		
	Post-Launch Review	18-Nov-2010			20-Nov-2010			2		
In-Market Launch Date:		29-Oct-2010								

Columns are defined as follows:

Milestone

- Left most column—The stage number
- Right of the Stage Number—The stage name and gate name
- In-Market Launch Date—The date that you expect the product to begin selling and/or shipping to customers

Start

- Planned—The date you expect the project to begin stage, gate or in-market launch efforts. These values can be calculated using the project template's durations or manually entered.
- Actual—The date the stage, gate or in-market launch efforts actually begin. A majority of these values are inherited from the project's workflow. However the following exceptions exist:
  - Initial Stage Actual Start Date: This field is automatically populated based on the project's create date. In addition, a user can manually override the value to better reflect when the project begins.
  - Actual In-Market Launch Date: NPD does not have an automated means for capturing this information. Therefore it is expected that a project manager enter the appropriate information to reflect the actual date the product enters the market.

- RAG Status
  - Red—If current or actual date is greater than the planned date for a given beginning or end date
  - Green—If current date or actual date is less than or equal to the planned date

End

- Planned—The date you expect the stage or gate to end. These values can be calculated using the project template's durations or manually entered.
- Actual—The date the stage or gate ends. These values are inherited from the project's workflow.
- RAG Status—Uses the same logic as described under Planned RAG Status.

Global Milestone Duration

- Planned—Duration from Planned Start Date to Planned End Date for a given stage or gate. Represented as a number of days.
- Actual—Duration from Actual Start Date to Actual End Date for a given stage or gate. Represented as a number of days.

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 5-38 for more information.

Figure 5-6: Global milestones for a project template

Global Milestones

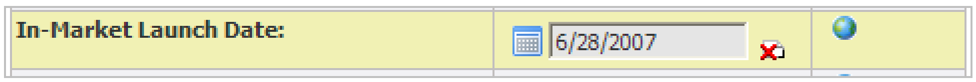
Critical Milestone	Date Adjust	Display
Packaging Approval	21 Days Before Launch	Pkg Appr
In-Market Launch Date	0	Launch
Stage 1 (Ideation) Begins	90 Days Before Launch	S1Begins
Stage 2 (Concept Qualification) Begins	90 Days Before Launch	S2Begins
Stage 3 (Product Qualification) Begins	90 Days Before 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.

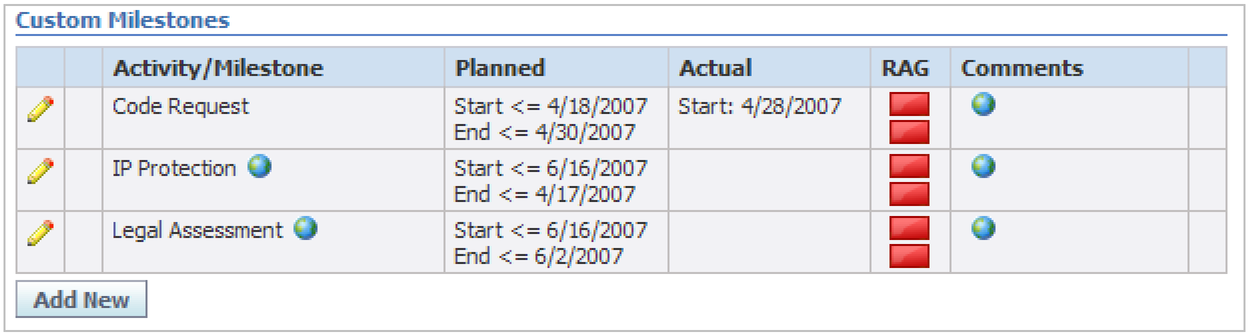
Custom Milestones

Custom milestones capture and present date information related to activities performed throughout a project. The milestones can be directly linked to other NPD activities or merely represent notes that are manually entered. Differences in functionality do exist depending on the type of custom milestone created, which are defined as follows:

1. NPD Activity Custom Milestones—An NPD activity is presented by selecting a given NPD activity template. A template should only be presented once for a given project schedule instance. When this is done, planned values can be calculated from a project template and actual values are presented for the last instance of a given activity. Please note if you execute multiple instances of an activity only the dates from the last instance will be presented. Please refer to the *Project Milestones Defaults Tab* on page 5-38 for more information about this feature in project templates.
2. Manual Custom Milestones—Using this capability, a user merely enters text to represent a body of work or event. Planned start dates must be manually entered and actual dates cannot be captured.

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				

Add New

Key fields include:

Start

- Planned—The date you expect the activity to begin. NPD activity-related milestone values can be calculated using the project template's durations. All types can be manually entered.
- Actual—The date the activity is created. This field is automatically populated based on the latest activity's create date.
- RAG Status—Uses the same logic as described under Planned RAG Status.

End

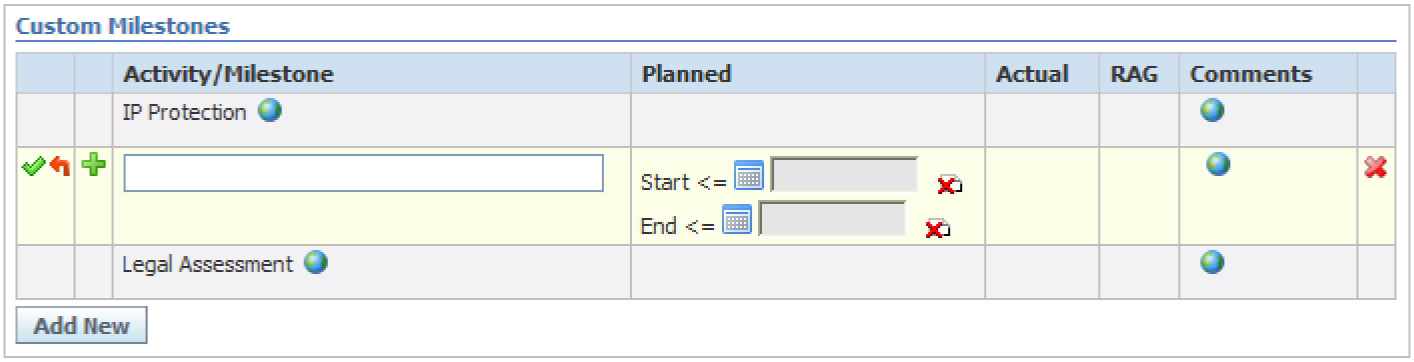
- Planned—The date you expect the activity to end. NPD activity-related milestone values can be calculated using the project template's durations. All types can be manually entered.
- Actual—The date the activity reaches a terminal state. This field is automatically populated based on the latest activity's workflow history.
- RAG Status—Uses the same logic as described under Planned RAG Status.

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



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

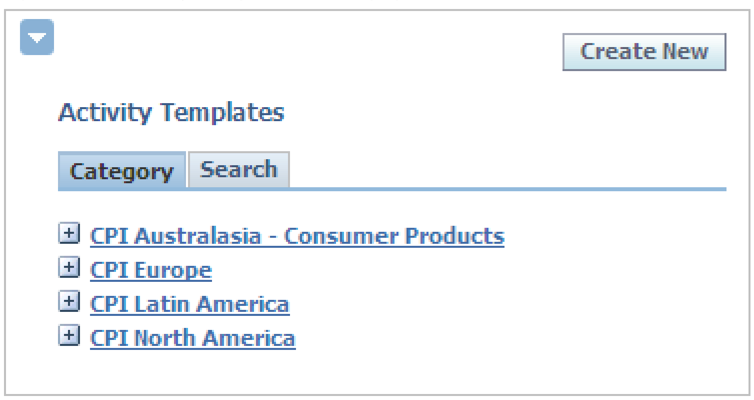
Key fields include:

- **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

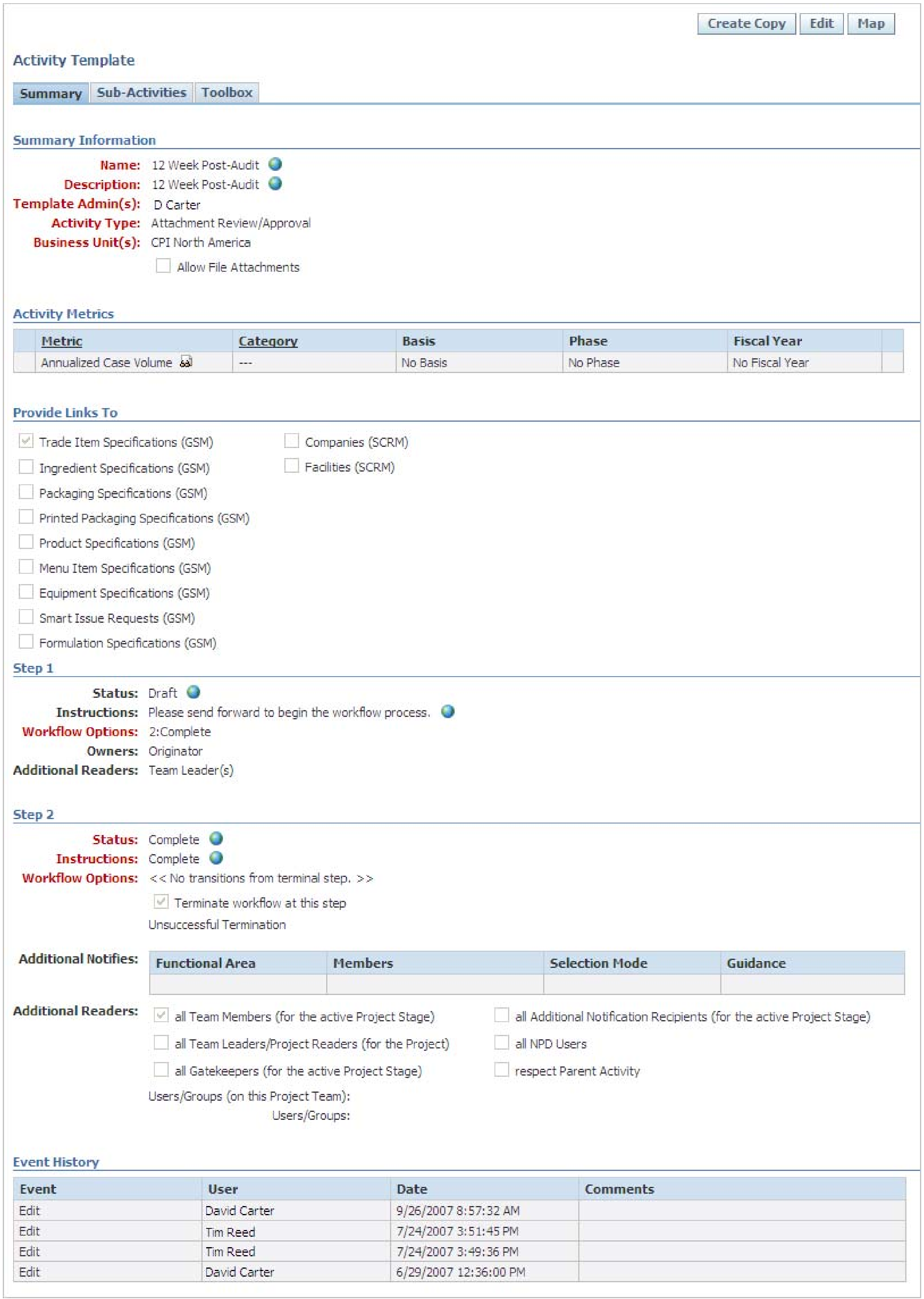


Select an activity template using the Category tab or the Search tab. The Activity Template page, shown in figure 5-12 below, consists of three tabs:

- Summary
- Sub-Activities
- Toolbox

To create a new activity template, click **Create New**. This procedure is detailed on page 5-64.

Figure 5-12: Activity Template page



Create Copy | Edit | Map

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): CPI 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)
- Ingredient Specifications (GSM)
- Packaging Specifications (GSM)
- Printed Packaging Specifications (GSM)
- Product Specifications (GSM)
- Menu Item Specifications (GSM)
- Equipment Specifications (GSM)
- Smart Issue Requests (GSM)
- Formulation Specifications (GSM)
- Companies (SCRM)
- Facilities (SCRM)

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 Team Leaders/Project Readers (for the Project)
- all Gatekeepers (for the active Project Stage)
- all Additional Notification Recipients (for the active Project Stage)
- all NPD Users
- respect Parent Activity

Users/Groups (on this Project Team):
Users/Groups:

Event History

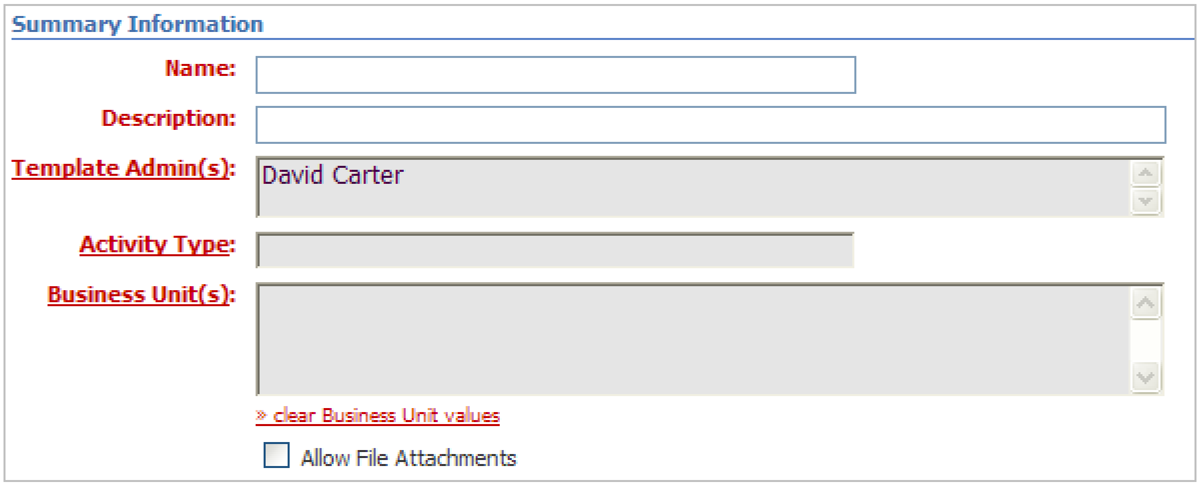
Event	User	Date	Comments
Edit	David Carter	9/26/2007 8:57:32 AM	
Edit	Tim Reed	7/24/2007 3:51:45 PM	
Edit	Tim Reed	7/24/2007 3:49:36 PM	
Edit	David Carter	6/29/2007 12:36:00 PM	

Summary Tab

Summary Information Section

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

Figure 5-13: Summary Information section



Key fields include:

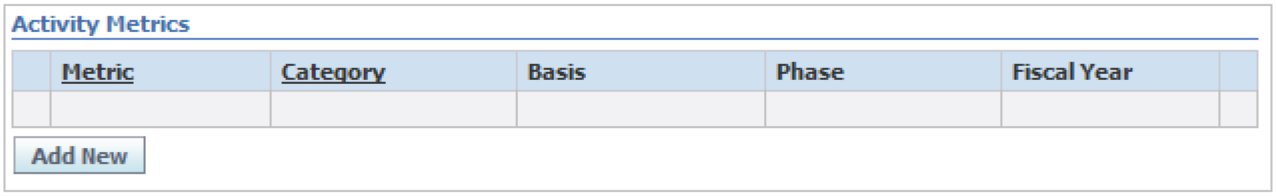
- **Name**—The name of the activity template. This is a required field.
- **Description**—Description of the activity template. This is a required field.
- **Template Admin(s)**—Those users that will have edit access to this template. This is a required field.
- **Activity Type**—The type of activity 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 NPD 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



Provide Links To Section

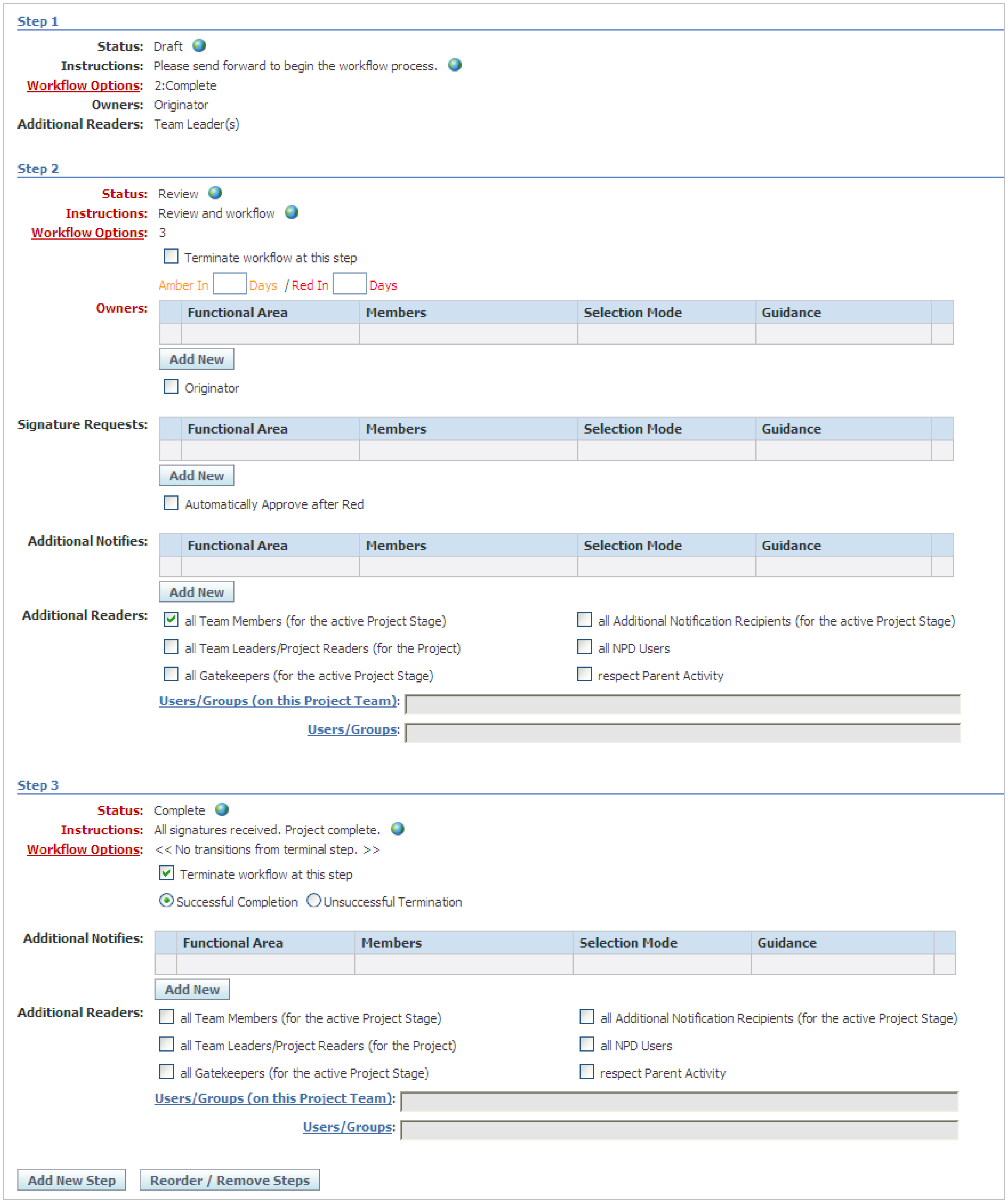
Use this section, as shown in figure 5-15 below, to define whether specifications, companies, and facilities can be linked to this activity. You can now link formulation specifications and smart issues to an activity.

Figure 5-15: Provide Links To section

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



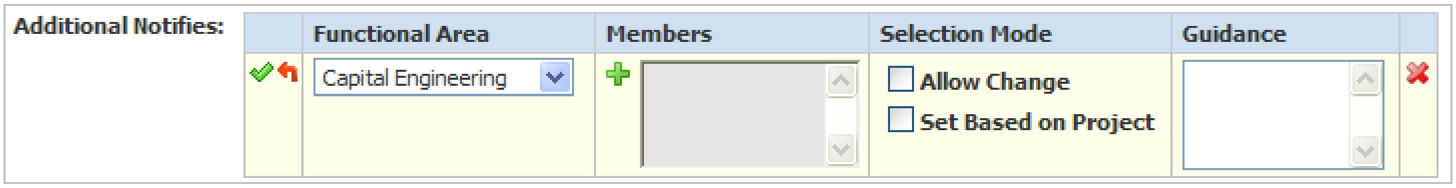
Key fields include:

- **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.
- **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.
- **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. If checked, two radio buttons are displayed: **Successful Completion** and **Unsuccessful Termination**. These tags are available to further describe and standardize an activity step or status. If you name a step “Failed,” “Incomplete,” or “Undetermined,” these may represent an Unsuccessful Termination. “Complete,” “Success,” or “Approved” may represent Successful Completion. You may choose to reference these tags when writing custom reports.
- **Additional Notifies**—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



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.

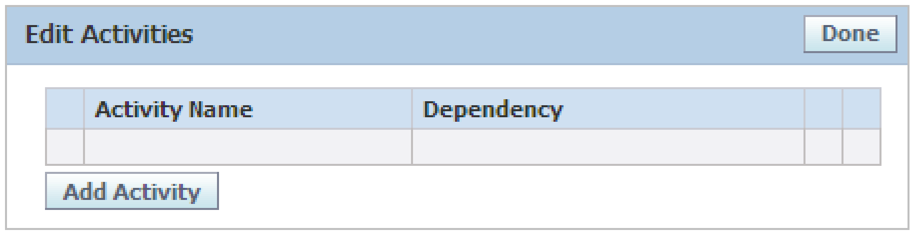
Sub-Activities Tab

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

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



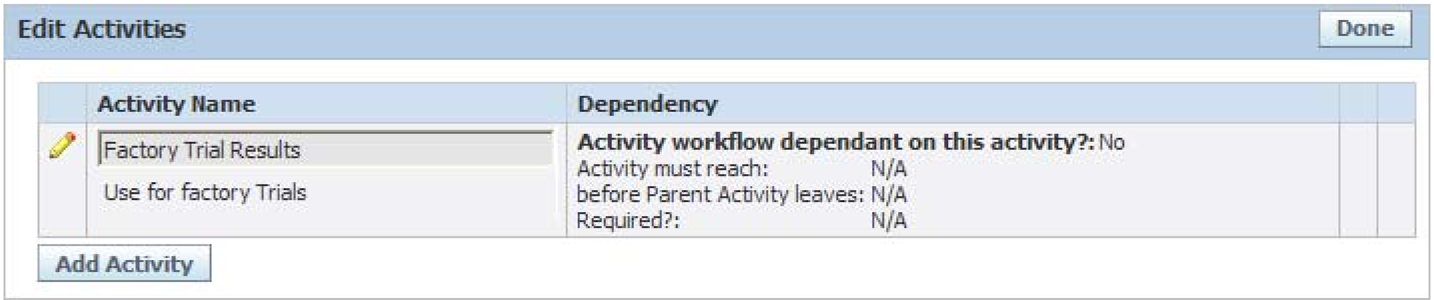
2 Click **Add Activity**. A dialog box displays that lists activity templates, as figure 5-19 shows below:

Figure 5-19: Activity template dialog box

Note Depending on your configuration, the list of activity templates may be categorized by business unit.

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



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

5 Determine if the parent activity's workflow status 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 then users will be able to perform the parent activity without performing the sub-activity. If the sub-activity is invoked, then the rules defined in the dependency column for this activity will be enforced.

  If **Yes** is selected then the activity will not allow you to proceed without creating an instance of the sub-activity and achieving the specified dependency rules.

  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.

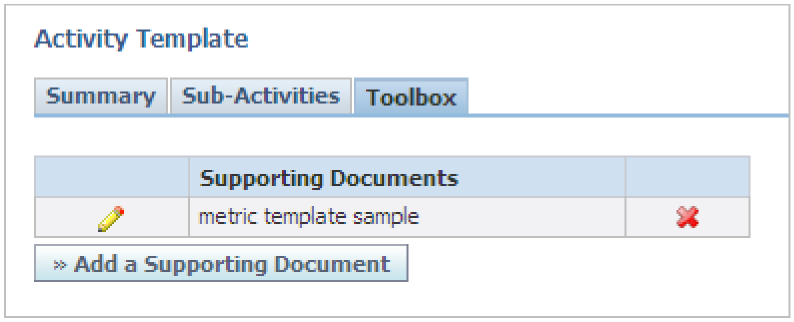
7 To apply the changes, click the apply changes icon ( ) in the first column.

8 Click **Done** to return to the Activity page.

Toolbox Tab

The Toolbox tab contains uploaded documents that support the current activity, as figure 5-21 shows below. All activities that use this activity template will have access to these documents through the Coaching/Templates tab.

Figure 5-21: Toolbox tab



Activities

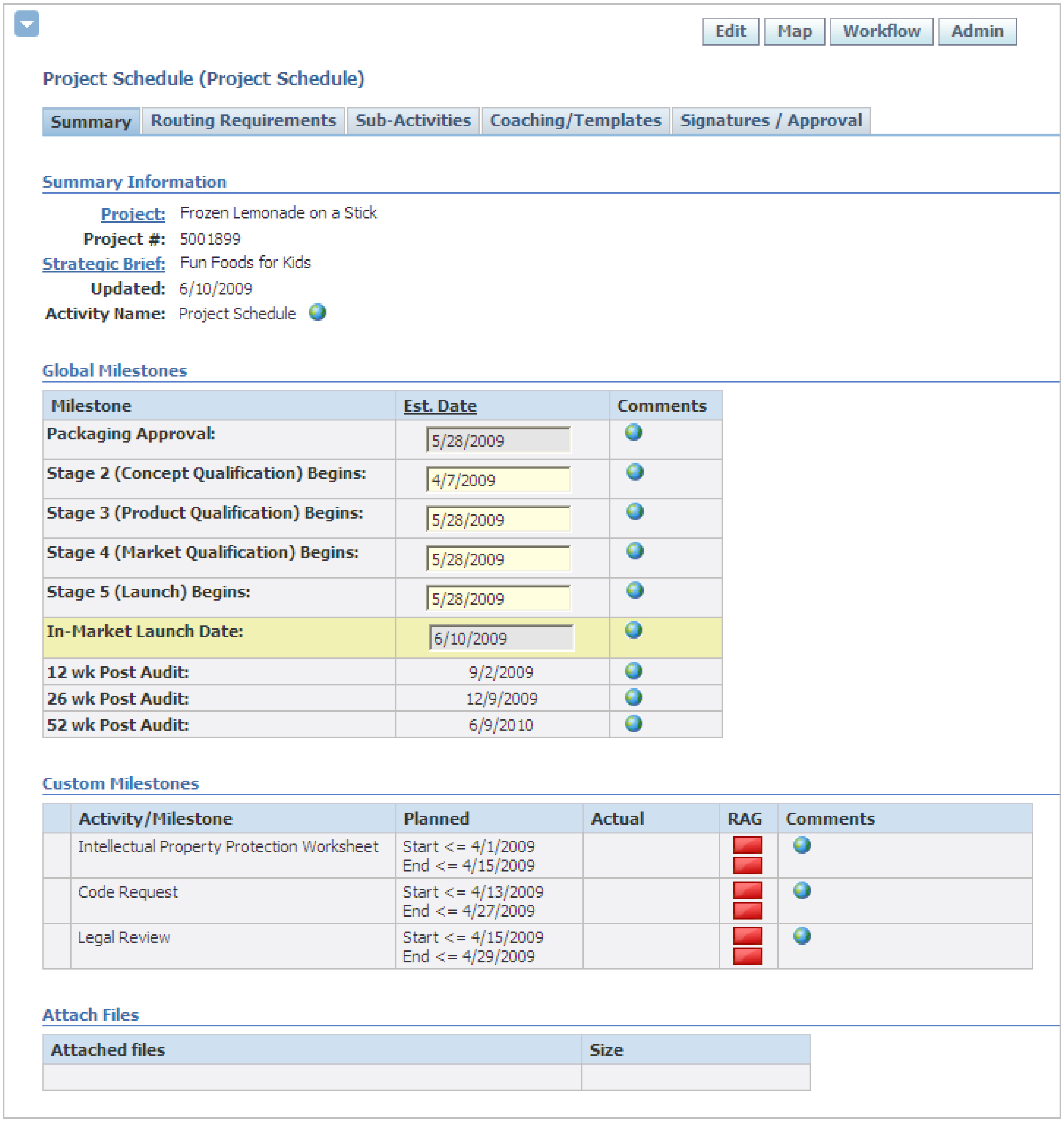
Create new activities in a project based on saved activity templates. Refer to *Activities Tab* on page 5-37 to determine where activities are added. The Activity page consists of the following tabs:

- 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 5-22 shows one type of activity:

Figure 5-22: Project schedule activity



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

Summary Information Section

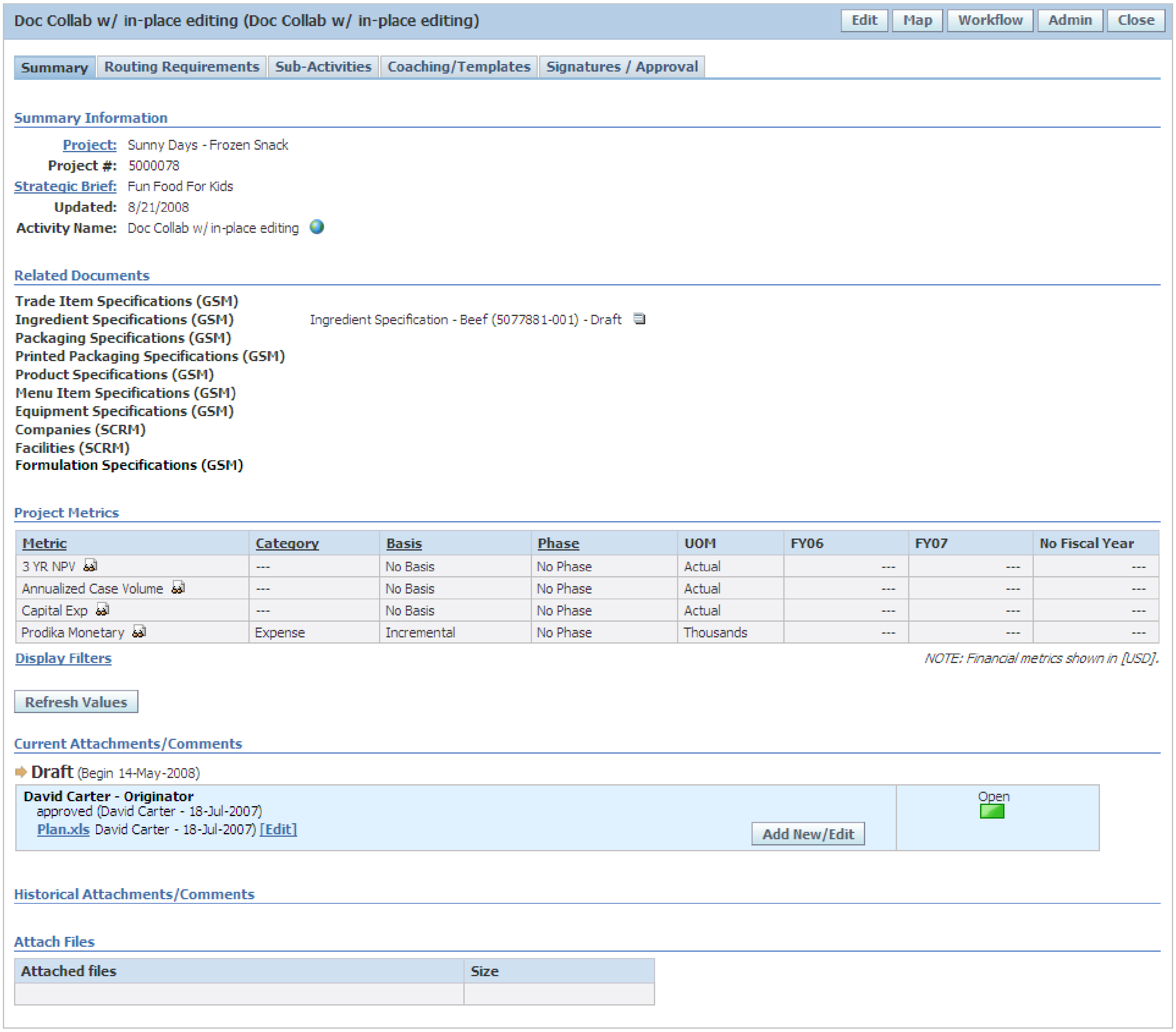
The Summary Information section, shown in figure 5-23 below, displays data from the project and activity template.

Figure 5-23: Summary Information section

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 5-24 and figure 5-25.

Figure 5-24: Sample Summary page for a document collaboration with in-place editing activity



Doc Collab w/ in-place editing (Doc Collab w/ in-place editing)

Edit | Map | Workflow | Admin | Close

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

Summary Information

Project: Sunny Days - Frozen Snack
Project #: 5000078
Strategic Brief: Fun Food For Kids
Updated: 8/21/2008
Activity Name: Doc Collab w/ in-place editing

Related Documents

Trade Item Specifications (GSM)
Ingredient Specifications (GSM) — Ingredient Specification - Beef (5077881-001) - Draft
Packaging Specifications (GSM)
Printed Packaging Specifications (GSM)
Product Specifications (GSM)
Menu Item Specifications (GSM)
Equipment Specifications (GSM)
Companies (SCRM)
Facilities (SCRM)
Formulation Specifications (GSM)

Project Metrics

Metric	Category	Basis	Phase	UOM	FY06	FY07	No Fiscal Year
3 YR NPV	---	No Basis	No Phase	Actual	---	---	---
Annualized Case Volume	---	No Basis	No Phase	Actual	---	---	---
Capital Exp	---	No Basis	No Phase	Actual	---	---	---
Prodika Monetary	Expense	Incremental	No Phase	Thousands	---	---	---

Display Filters

NOTE: Financial metrics shown in [USD].

Refresh Values

Current Attachments/Comments

Draft (Begin 14-May-2008)

David Carter - Originator
approved (David Carter - 18-Jul-2007)
Plan.xls David Carter - 18-Jul-2007) [Edit]

Add New/Edit

Open

Historical Attachments/Comments

Attach Files

Attached files	Size

Related Documents Section

The Related Documents section shows linked GSM specification types and SCRM 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. When performing a search, the parent application's security policies are respected.

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.

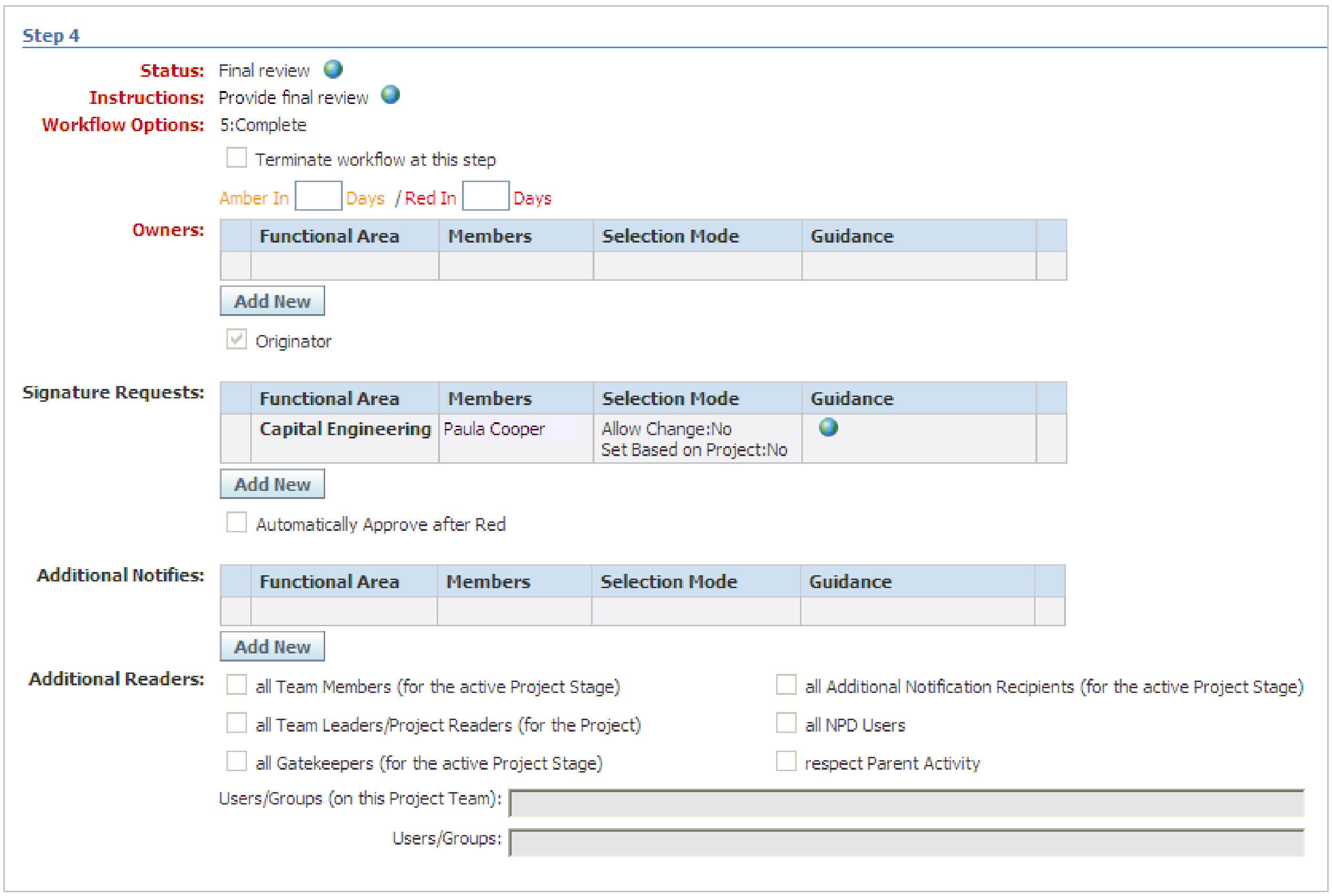
Figure 5-25: Sample Summary page for an executive summary activity

Routing Requirements Tab

The Routing Requirements tab, shown in figure 5-26, displays data from the activity template. For detailed information on the fields in this section, refer to *Activity Templates* on page 5-12.

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 5-16 for more information.

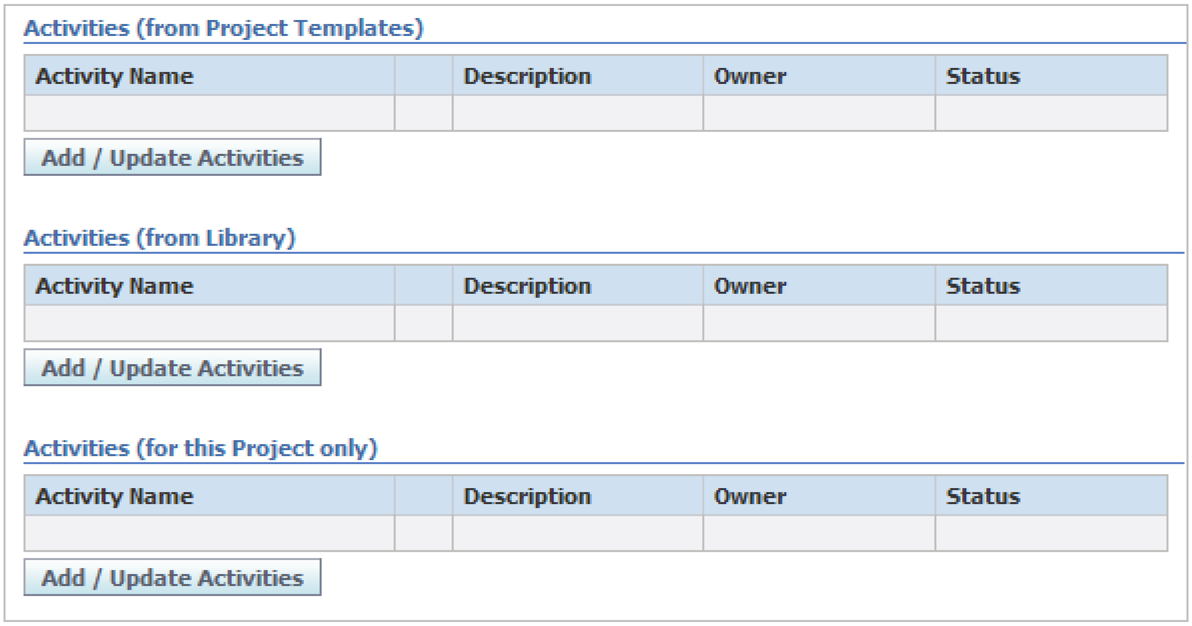
Figure 5-26: Routing Requirements tab, Steps section



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 5-50 for more information about how activities and sub-activities impact projects. Figure 5-27 shows sub-activity sections.

Figure 5-27: Sub-activities sections



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.

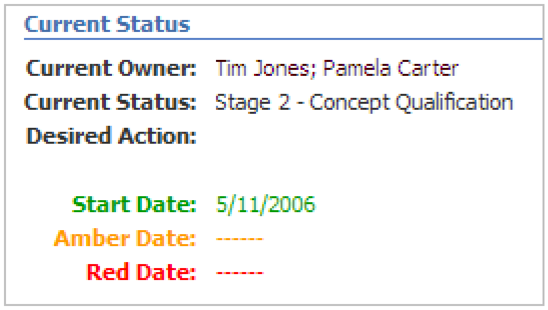
Signature/Approval Tab

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.

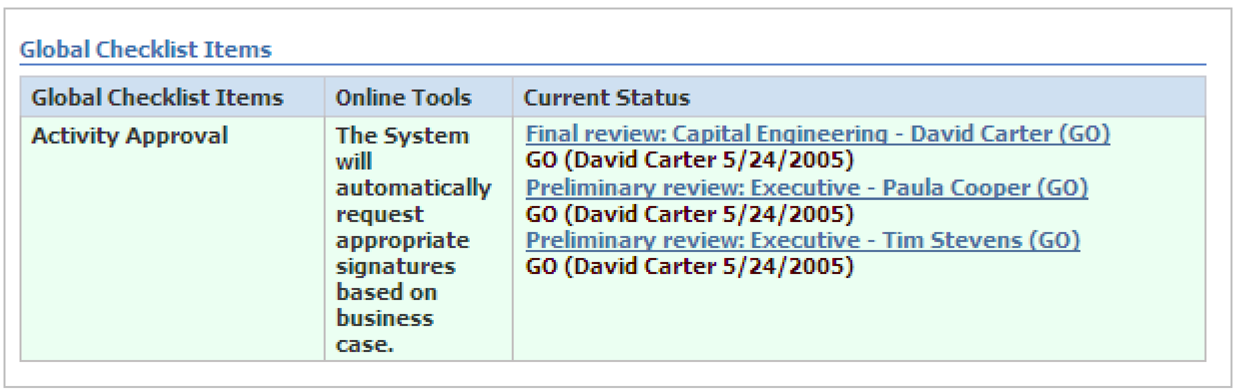
Figure 5-28: Current Status section



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 5-29: Global Checklist Items section



Global Checklist Items

Global Checklist Items	Online Tools	Current Status
Activity Approval	The System will automatically request appropriate signatures based on business case.	Final review: Capital Engineering - David Carter (GO) GO (David Carter 5/24/2005) Preliminary review: Executive - Paula Cooper (GO) GO (David Carter 5/24/2005) Preliminary review: Executive - Tim Stevens (GO) GO (David Carter 5/24/2005)

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 business rules and process to manage the new product development process within your business unit. Each project template declares team member formulation requirements (TMFR) and milestones that will appear at each stage of the project lifecycle. The TMFR acts as:

- A required set of participants to assist in managing one or many activities or tasks within a project.
- A template describing the functional areas needed to support a project. Once invoked the project leader will assign the appropriate users. The content of project templates varies based on project scope (business unit and project type).

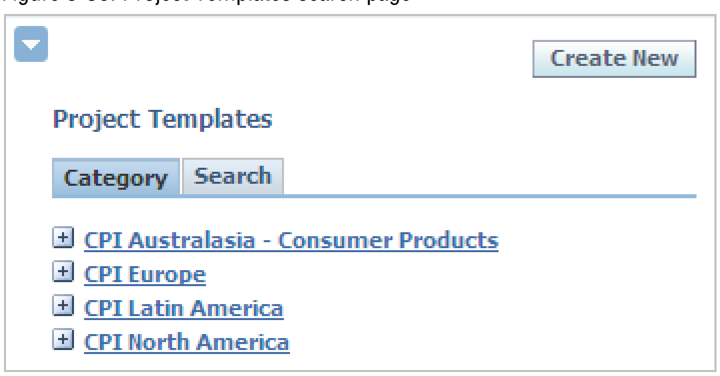
Within each project template, define two key elements for each stage of the NPD process, as shown in table 5-1:

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

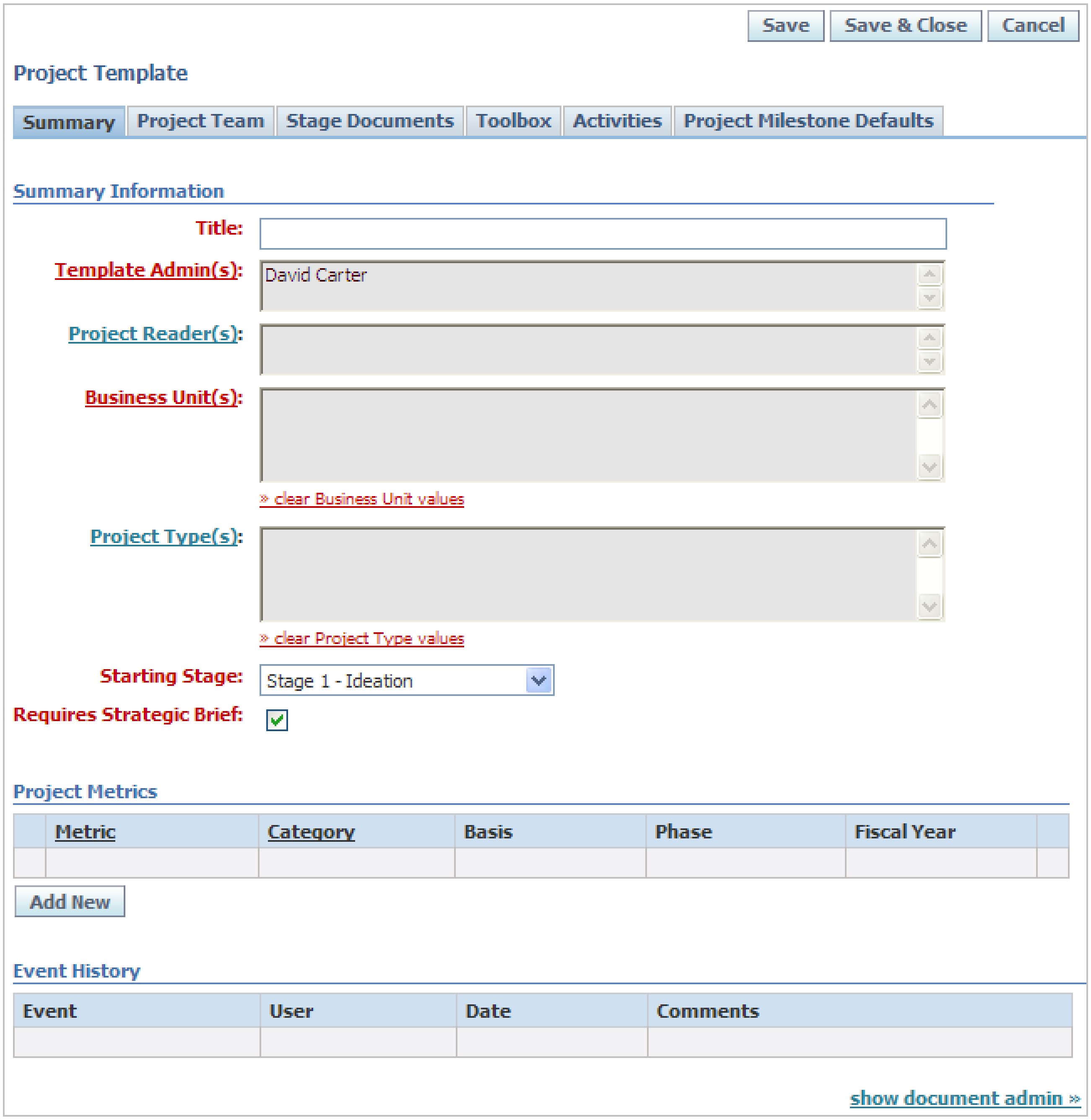
To choose a project template, select **Templates > Project Templates** from the left navigation panel. The Project Templates search page displays, as figure 5-30 shows below:

Figure 5-30: Project Templates search page



Select a template using the Category tab or the Search tab. Figure 5-31 below shows the Project Template page.

Figure 5-31: Project Template page



This page consists of the following tabs:

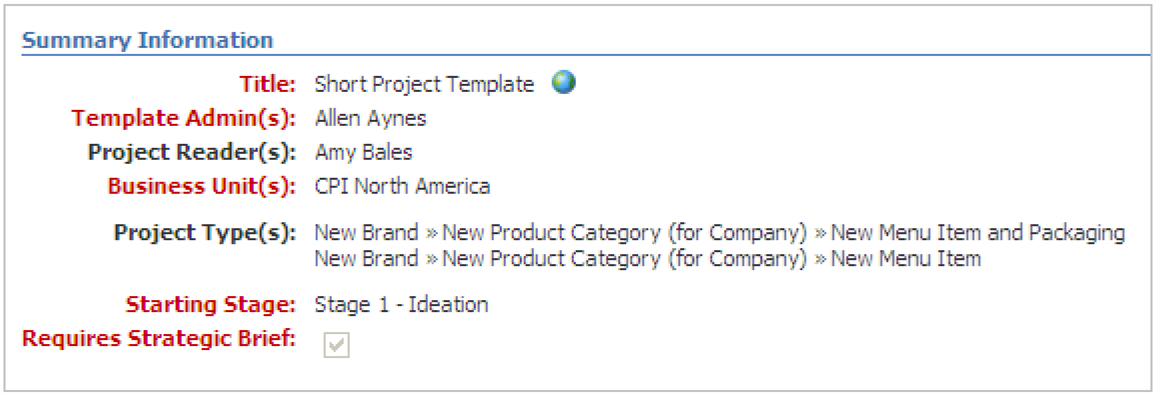
- Summary
- Project Team
- Stage Documents
- Toolbox
- Activities
- Project Milestone Defaults

Summary Tab

Summary Information Section

Use this section, shown in figure 5-32 below, to define the rules and users for a template.

Figure 5-32: Summary Information section



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 5-44 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 a 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.

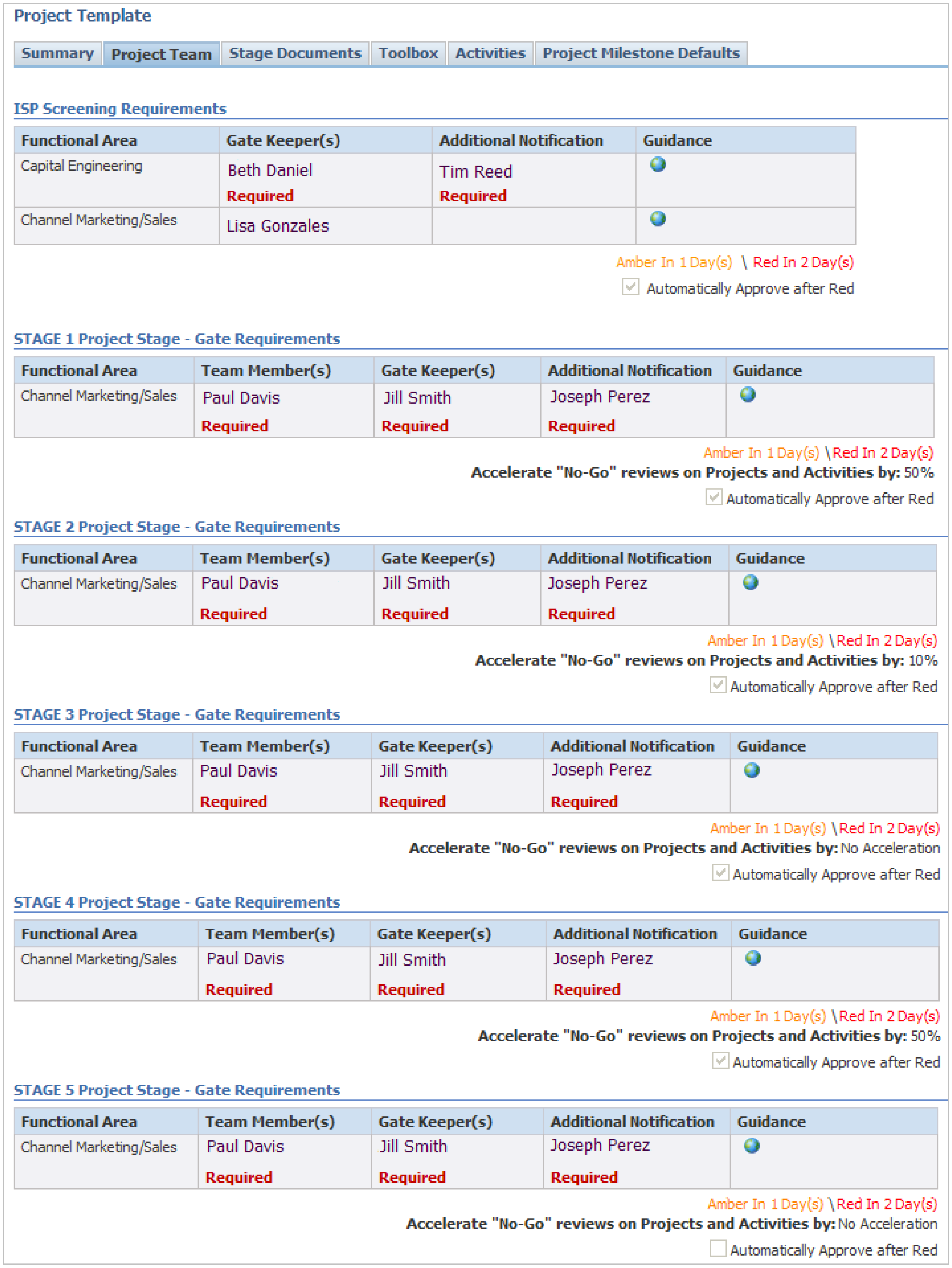
Table 5-2: Team member requirements

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 5-33, for assigning team members.

Figure 5-33: 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

Refer to *Team Member Formulation Requirements Section* on page 2-4 for more information on TMFR fields.

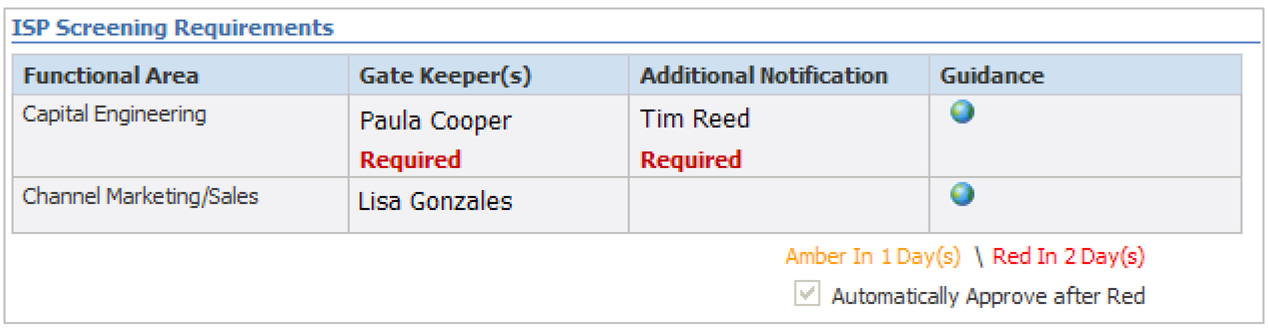
The Green/Amber/Red status indicator on the NPD Signature Requests section of the Action Items page is controlled by the following attributes:

- **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 5-34 below, shows the TMFR that will be used within an ISP (idea) 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 5-34: ISP Screening Requirements section



Project Stage - Gate Requirements Section

This section defines the TMFR data for each associated stage.

Figure 5-35: 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)

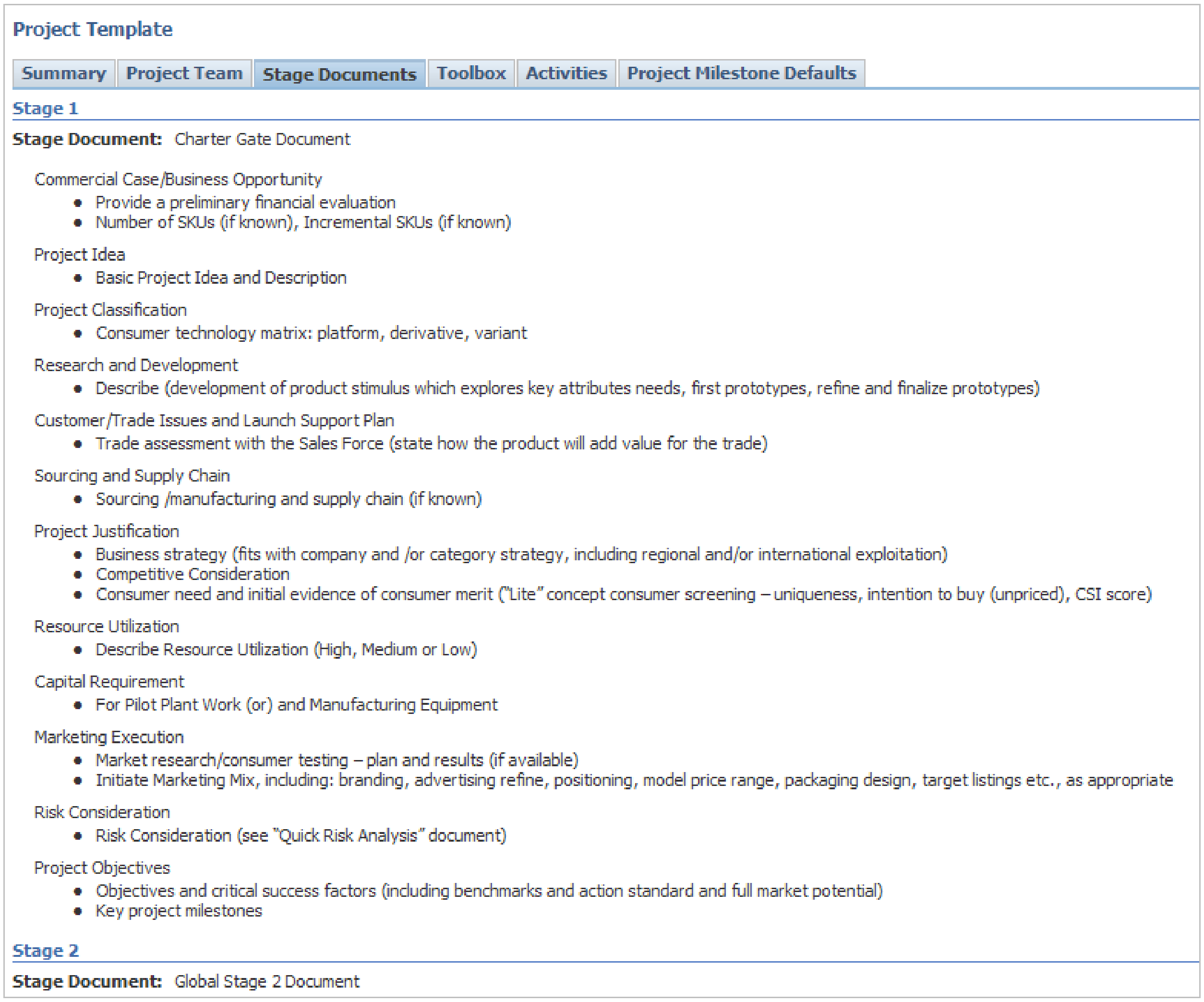
Accelerate "No-Go" reviews on Projects and Activities by: 50%

Automatically Approve after Red

Stage Documents Tab

The Stage Documents tab, shown in figure 5-36 below, lists stage and strategic brief questions related to each stage of the project. This tab may not display based on your configuration settings.

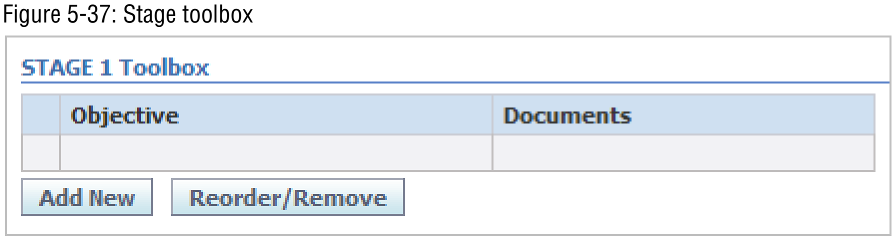
Figure 5-36: Stage Documents tab



Toolbox Tab

Use the Toolbox tab to attach business documents that will be used as templates, as figure 5-37 shows below. Add items by clicking **Add New**, and remove or reorder items by clicking **Reorder/Remove**.

Figure 5-37: Stage toolbox



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 5-50.

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 5-38 shows the Global Milestones section.

Figure 5-38: 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

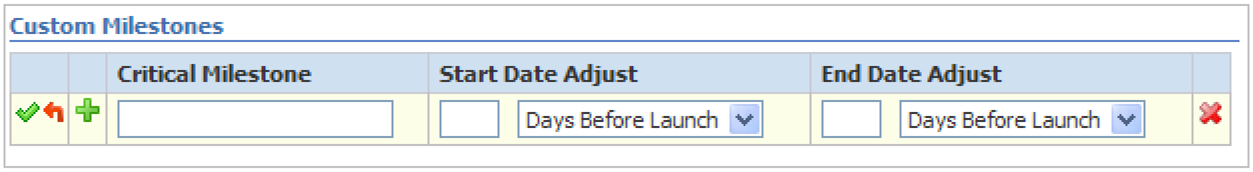
Key fields include:

- **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 5-39 shows below.

Figure 5-39: Custom Milestones section, edit mode



Key fields include:

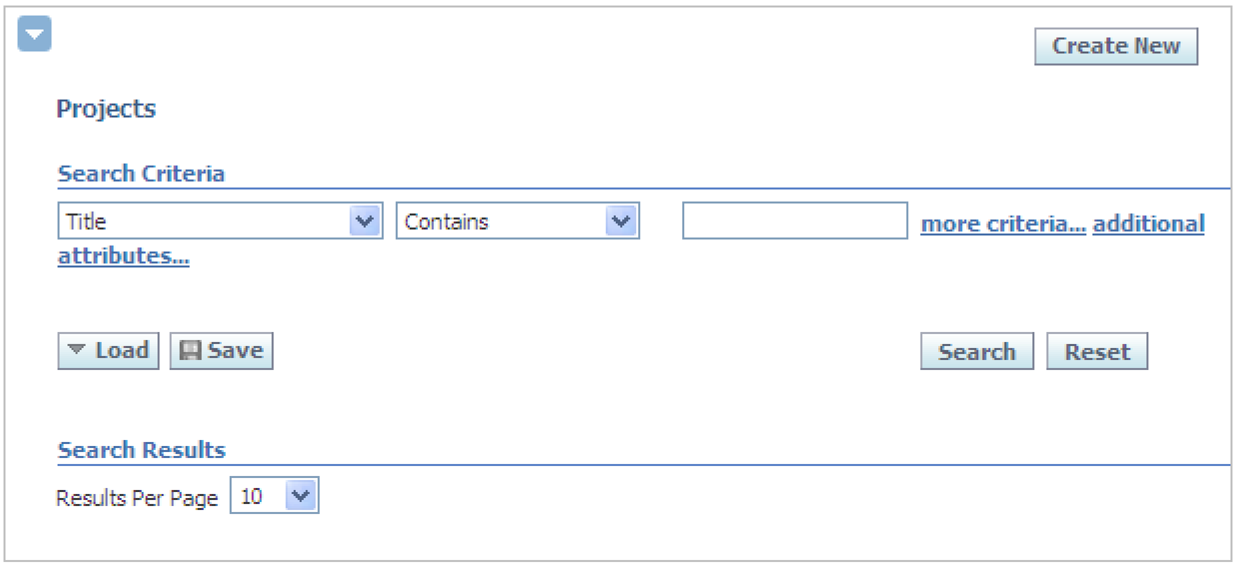
- **Critical Milestone**—Displays the name of the milestone.
- **Start Date Adjust**—The number of days before or after launch that this milestone's start date will be set to.
- **End Date Adjust**—The number of days before or after launch that this milestone's end date will be set to.

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 5-40 below. Search for and select a project. You can also access projects through your Action Items page, or through email notifications sent to you.

Note Search results will only include projects that the user is authorized to see. Enabling the NPD Private Project feature is configurable. By default, this configuration is turned off. For more information, see the *Agile Product Lifecycle Management for Process Configuration Guide*.

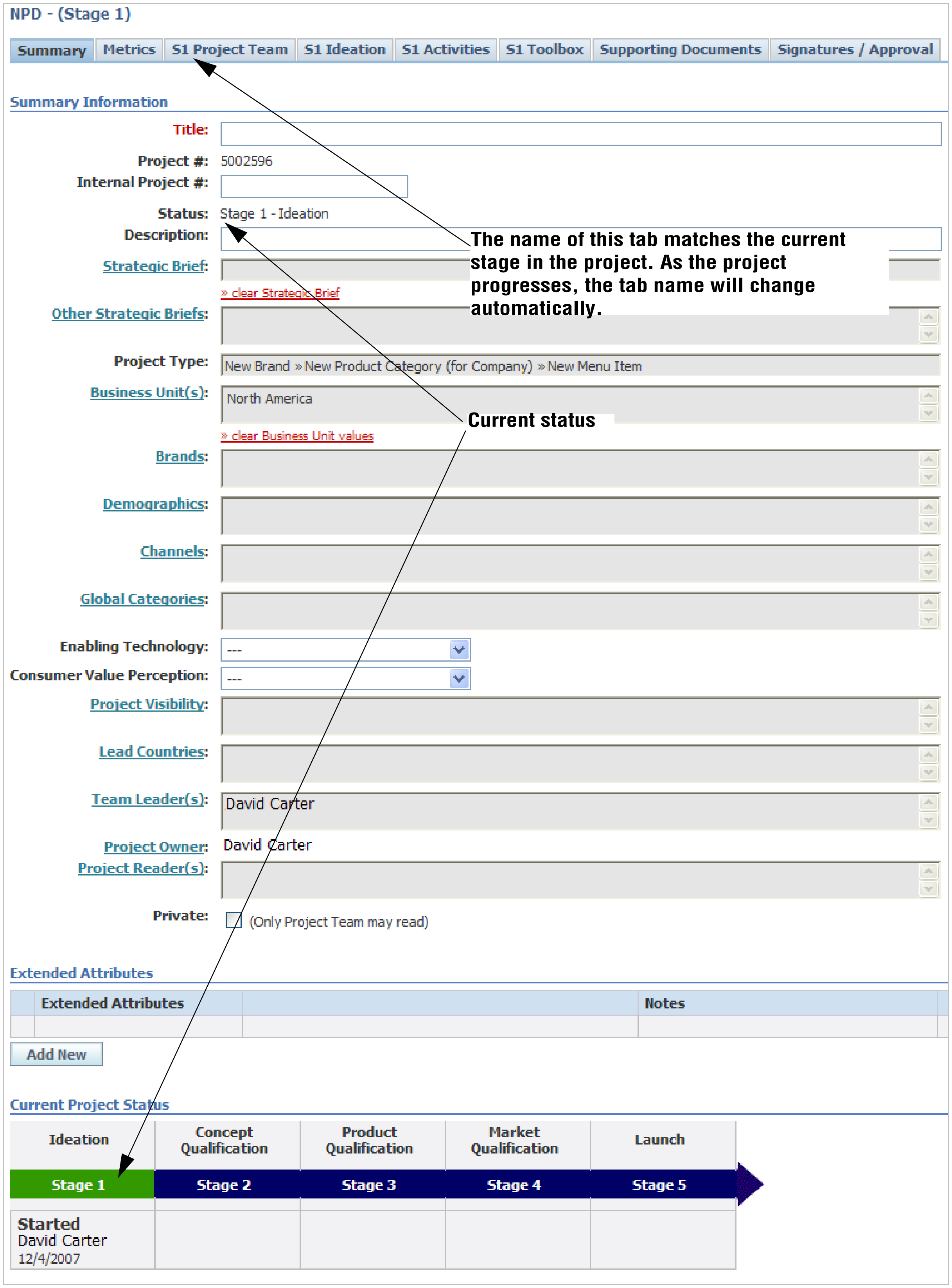
Figure 5-40: Projects search page



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 5-41 below.

You can create new projects using the **Create New** button. For detailed instructions, see *Creating a Project* on page 5-53.

Figure 5-41: Project page



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 stage-gate workflow.
- **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 Flag

All projects are available to all NPD users by default. When the private flag is checked, only authorized team members will have access to the project. Authorized team members include:

- Team Leaders—Summary Tab (regardless of stage)
- Additional Readers—Summary Tab (regardless of stage)
- Project Owner—Summary Tab (regardless of stage)
- Team Members—Project Team Tab (regardless of stage)
- Gate Keepers—Project Team Tab (regardless of stage)
- Additional Notification—Project Team Tab (regardless of stage)
- Authorized User of an Activity associated to the current Project Stage

For activities, a user is authorized for an activity belonging to a Private project if the user is a member of one of the following sections on the Routing Requirements tab for the current stage of the activity:

- Owners
- Signature Requests
- Additional Notifies
- Additional Readers

Additionally, a user is authorized for an activity belonging to a Private project if one of the following roles is assigned:

- NPD_Admin
- NPD_SA
- NPD_SA_Reader

Extended Attributes Section

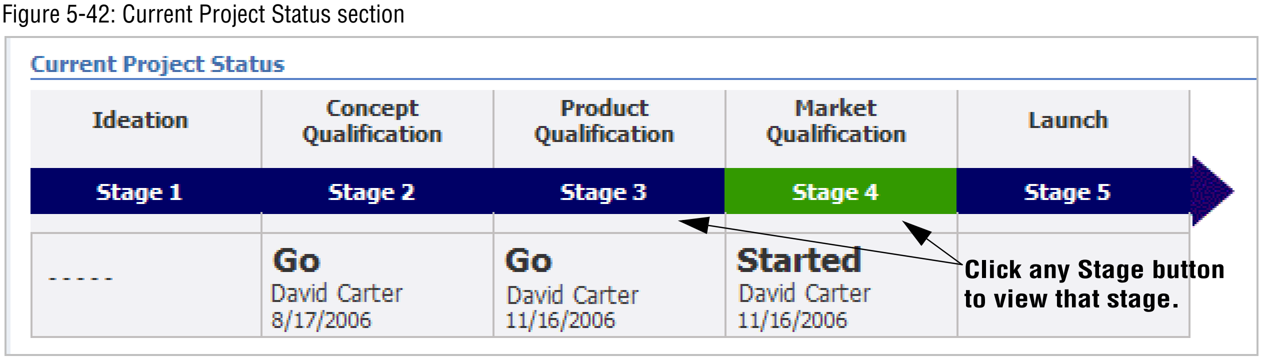
Use this section to add extended attributes for the project. Extended attributes define custom information for the project. Refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for a more in-depth discussion of extended attributes.

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 5-42: Current Project Status section

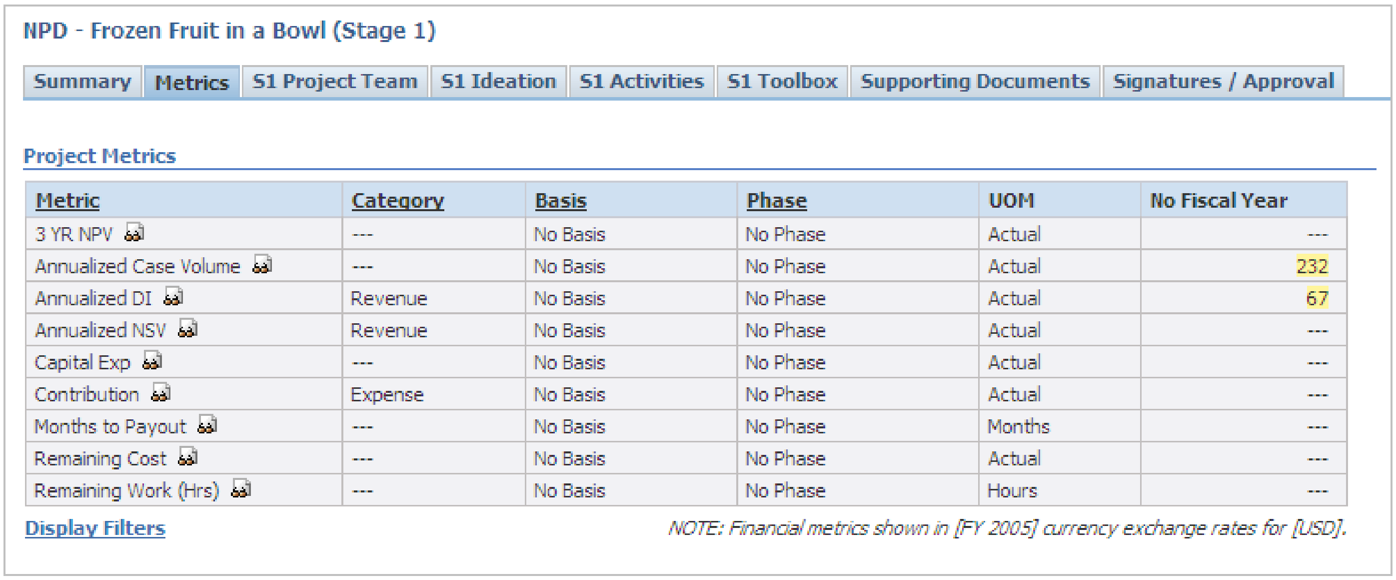


Metrics Tab

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 rollup 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 5-43: Metrics tab


NPD - Frozen Fruit in a Bowl (Stage 1)

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

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	232
Annualized DI	Revenue	No Basis	No Phase	Actual	67
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	Months	---
Remaining Cost	---	No Basis	No Phase	Actual	---
Remaining Work (Hrs)	---	No Basis	No Phase	Hours	---

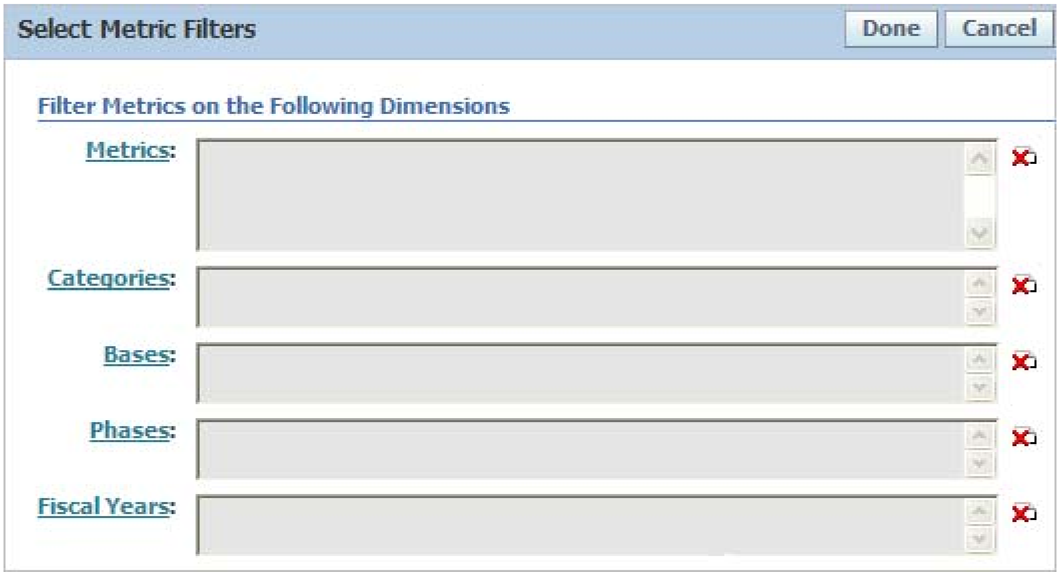
Display Filters

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 5-44 below, opens.

Financial metrics can be defined with an exchange relate related to a specific currency and fiscal year. The currency and year control the values entered and displayed. These values can be changed by changing the values in the **NOTE** at the bottom of the page. When changed, the conversion for all financial values will occur.

Figure 5-44: Select Metric Filters dialog box



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

Currency conversions are performed for financial metrics. Activity to Project Conversions are performed as follows:

1. Users are able to add and enter metric data on one or more activities. Financial data entered on an activity is associated with a currency, i.e. EUR - Euro.
2. On the project where the activities from step 1 exist the same metric is added. The metric is configured using the data source “From Calculation” so that values are rolled up from the associated activities. The calculated values are converted from the activity’s currency to the project’s displayed currency.

Note NPD Projects do not perform conversions for project level overrides. Instead it is recommended that overrides be entered via activities and rolled up/converted to the project. For example, a user enters an override on a project metric as 100,000 while the project currency is set to Euro. If the user changes the project currency from Euro to US Dollars the value entered remains 100,000. Therefore users must consider this functionality when managing metric data. It is recommended that data should be entered via activity metrics for currency conversion to work properly. Users can manage data on the activity via overrides or field exchange.

Adding Metrics

To add new metrics:

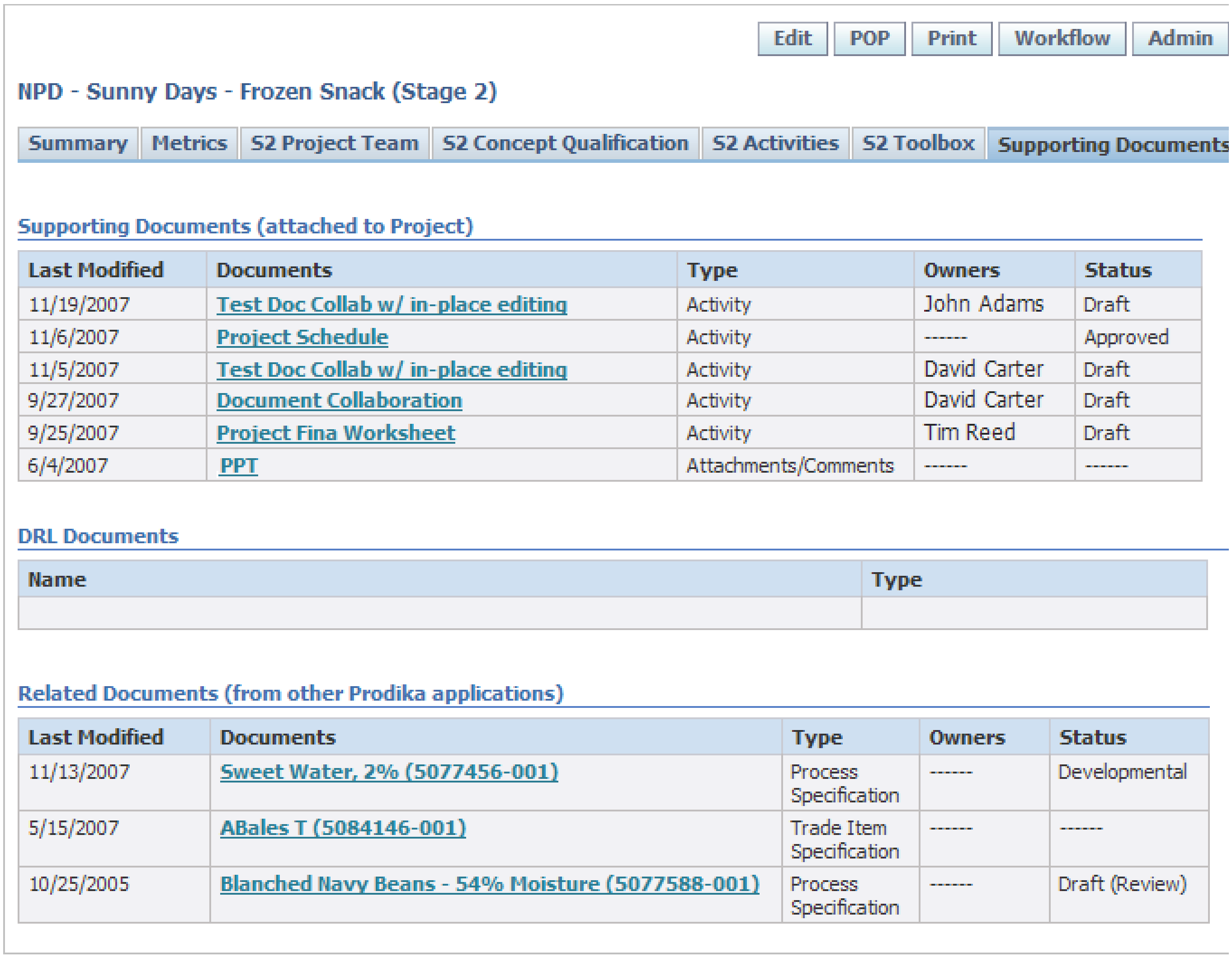
1. With the project in edit mode, select **Setup Metrics**.
2. Click **Add New**.
3. In the search dialog that displays, search and select the metrics you want to add.
4. Click **Done**.

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 5-45 below:

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

Figure 5-45: Supporting Documents tab



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	------	------

Name	Type

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 (ideas) 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 GSM specifications and SCRM companies and facilities that are related to the current project through its activities.

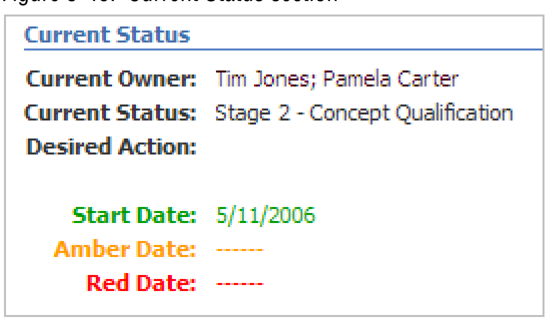
Signatures/Approval Tab

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 5-46: Current Status section



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 5-47: Global Checklist Items section

Global Checklist Items

Global Checklist Items	Online Tools	Current Status
Activity Approval	The System will automatically request appropriate signatures based on business case.	Final review: Capital Engineering - David Carter (GO) GO (David Carter 5/24/2005) Preliminary review: Executive - Paula Cooper (GO) GO (David Carter 5/24/2005) Preliminary review: Executive - Tim Stevens (GO) GO (David Carter 5/24/2005)

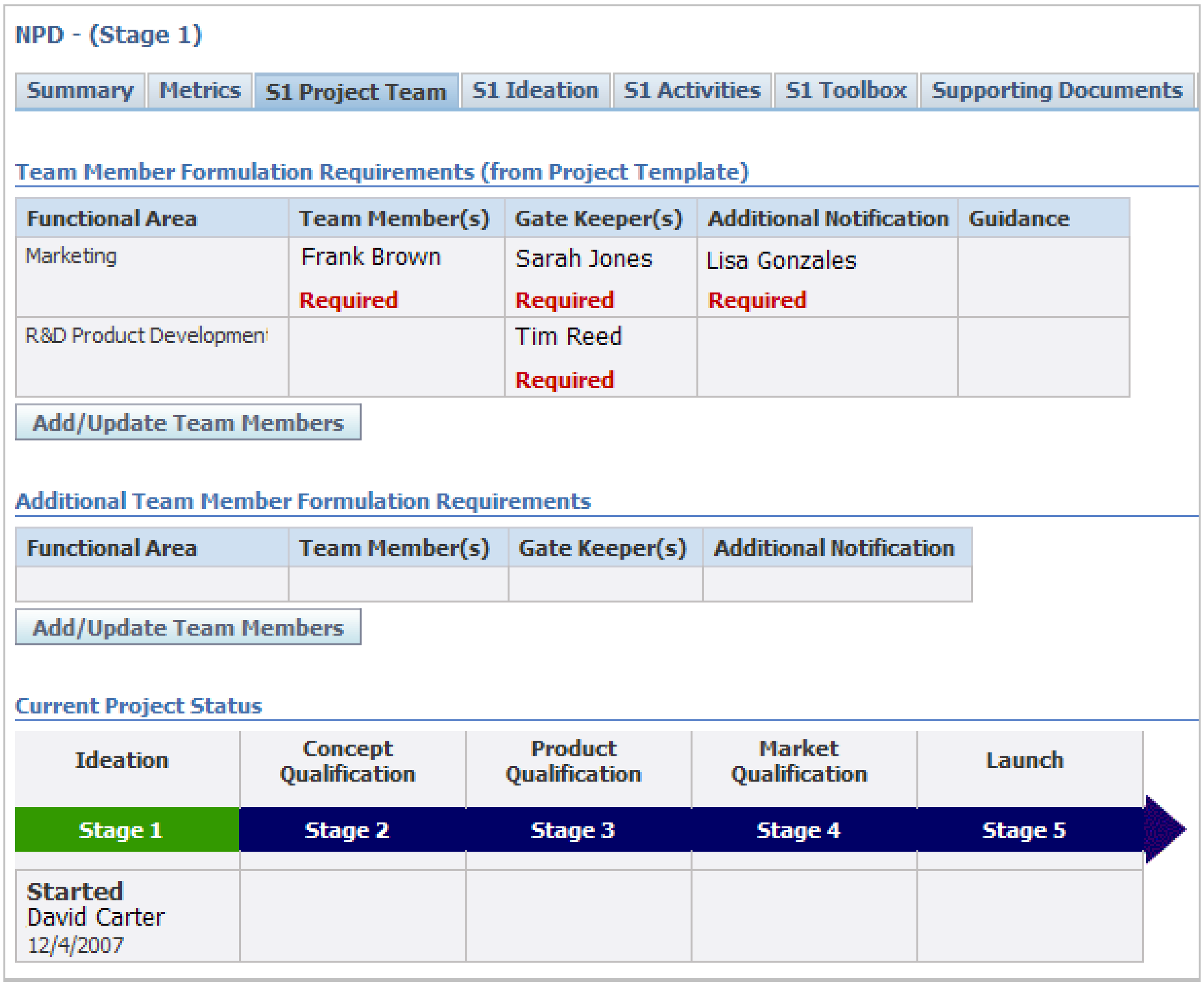
Event History Section

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 5-48 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 5-48: Project Team tab



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:

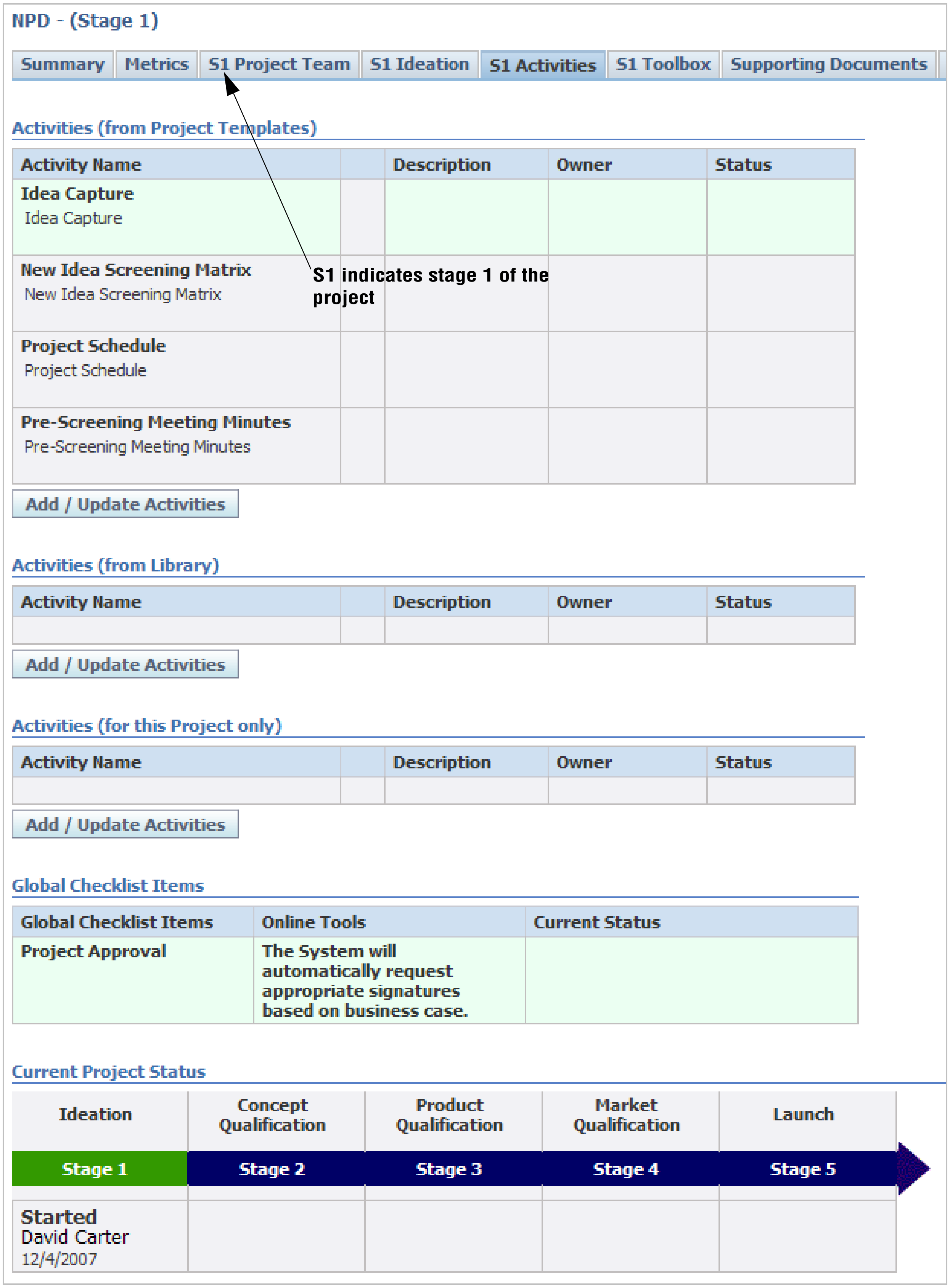
- The Team Member Formulation Requirements (from Project Template) section may be pre-populated based on the selections made in the applicable project template.
- The Team Member Formulation Requirements (from Project Template) section contains a Guidance column that the Additional Team Member Formulation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

Refer to *Current Project Status Section* on page 5-43 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 5-49 below shows the Activities tab.

Figure 5-49: Activities tab



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.

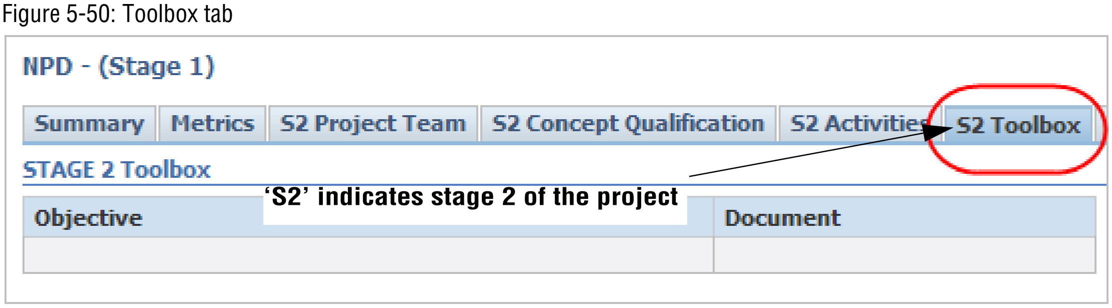
For all sections, key fields include:

- **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 5-50 shows the Toolbox tab.

Figure 5-50: Toolbox tab



Working with Projects

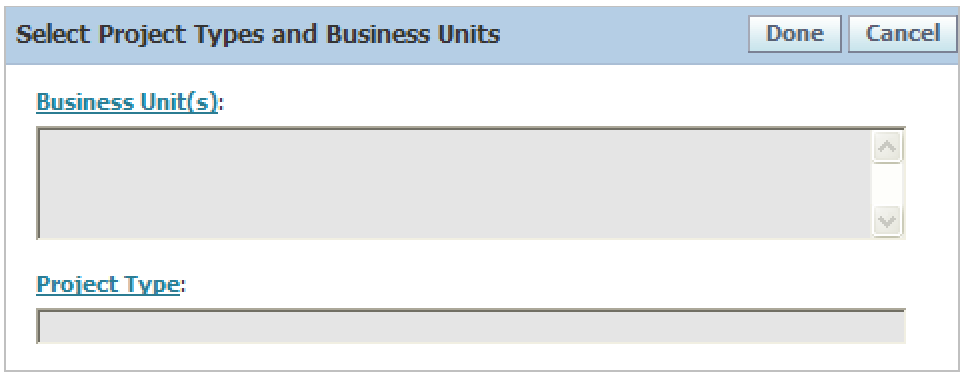
Creating a Project

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:

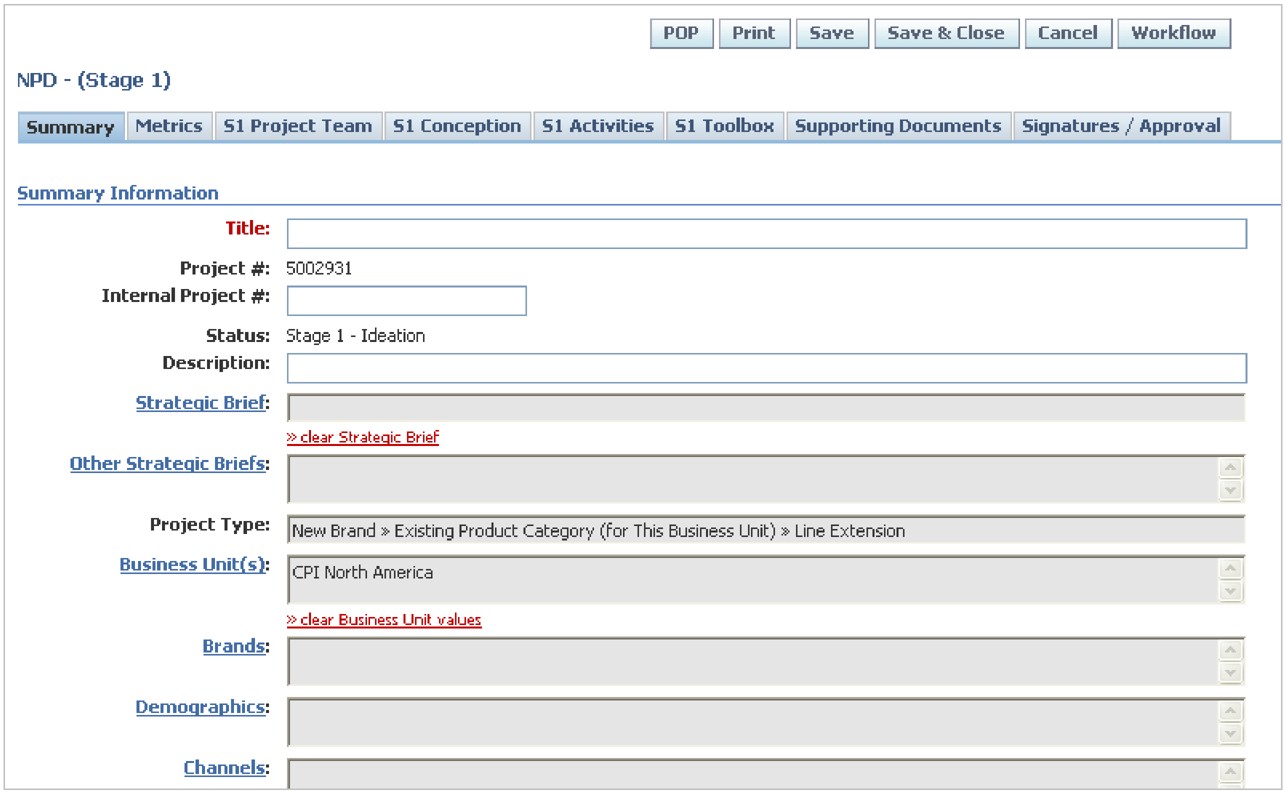
1. Click **New Product Development > Projects** from the left navigation panel. Agile PLM for Process displays the Projects search page.
2. Click **Create New**. The Select Project Types and Business Units page dialog box, as figure 5-51 shows below:

Figure 5-51: 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, as figure 5-52 shows below.

Figure 5-52: Project page based on defined project type and business unit



6 On the Summary tab, provide a title for the project in the Title field. This is a required field.

7 Click **Save**.

> **Note** The **clear Strategic Brief** and **clear Business Unit values** hyperlinks allow users with edit access to the project to reassign strategic briefs and business unit values.

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 category 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.**

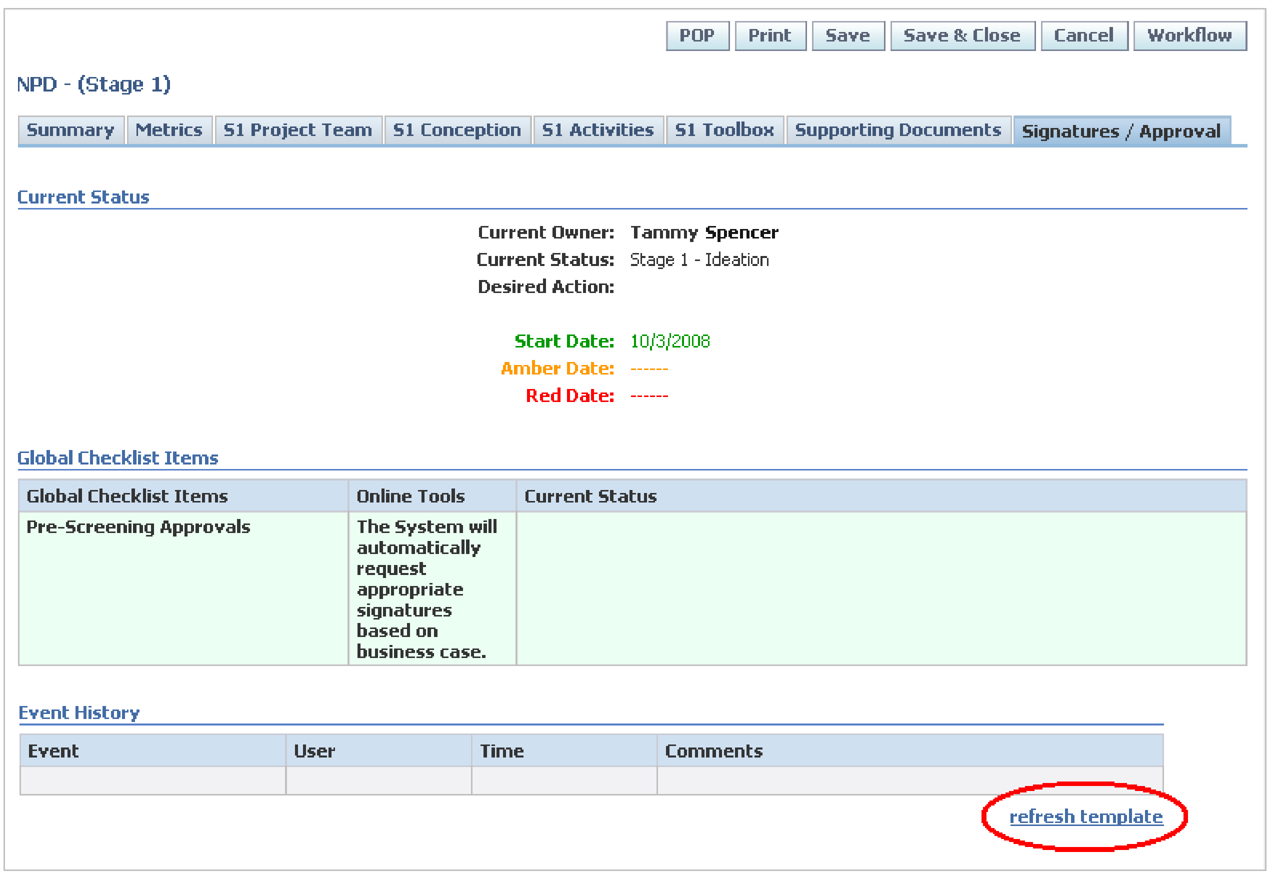
Refreshing a Template

The **refresh template** hyperlink displays on the Signature/Approval tab, as figure 5-53 shows below. The refresh from template feature is used to update future stages of the project from the original template. The original template is the template that the project originally resolved to based on project type and business unit.

Although users cannot switch a project's template, users are able to make changes to a project's business units. This means that a project can be initiated with a specific business unit taking the lead, for example, North America, and as the project progresses other business units can be included, for example, South America.

By adding a new business unit to the project as described above and clicking **refresh from template**, NPD does not resolve to a new template. It merely refreshes all future stages based on the original template.

Figure 5-53: Refresh template hyperlink



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 5-54 below.
3. Select **Yes** next to the Remove Project? field. NPD displays a text field.
4. Enter an explanation in the free text field.
5. Click **Done**.

Figure 5-54: Project Administration dialog box

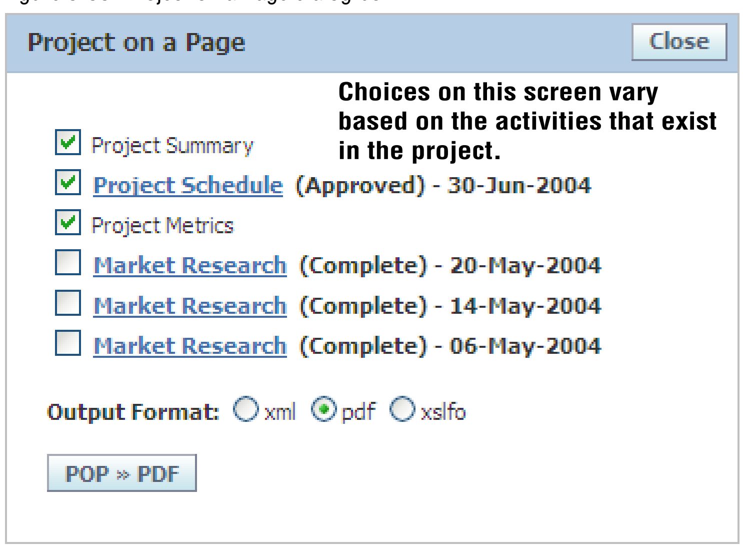
Using the Project on a Page Feature

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 5-55 shows below.

Figure 5-55: 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. Figure 5-56 below shows a POP sample for a project summary activity type.

Figure 5-56: POP sample, project summary activity type

Veggie Pop (Popsicle)			
CPI	Project Report	Status:	Stage 2 - Concept Qualification
		Date:	24-Jun-2009
		Printed by:	[redacted]

Project Summary Information	
Project Type:	Current Brand » Existing CPI Product Category (for This Business Unit) » Line Extension/Range Extension/New Variety
Project Scope(Mission Objectives):	Improve product offering by providing healthy desert options.
Key Issues/Risks:	- Marketing has identified that a major campain will need to be created to successfully market veggie treats to our demographic, kids 8 - 12.
Team Leader(s):	[redacted]

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 5-57 shows below.

Figure 5-57: Print Options dialog box

Print Options — Print | Close

	Astronaut Ice cream (5002561)	Status	Print
	Astronaut Ice cream	Stage 1 - Ideation	
	Project Summary		☑
	Project Metrics		☑
+	Project Team		☑
+	Stage Documents		☑
+	Project Activities/Documents Summary		☑

Output Format: ○ xml ◉ pdf ○ xslfo

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

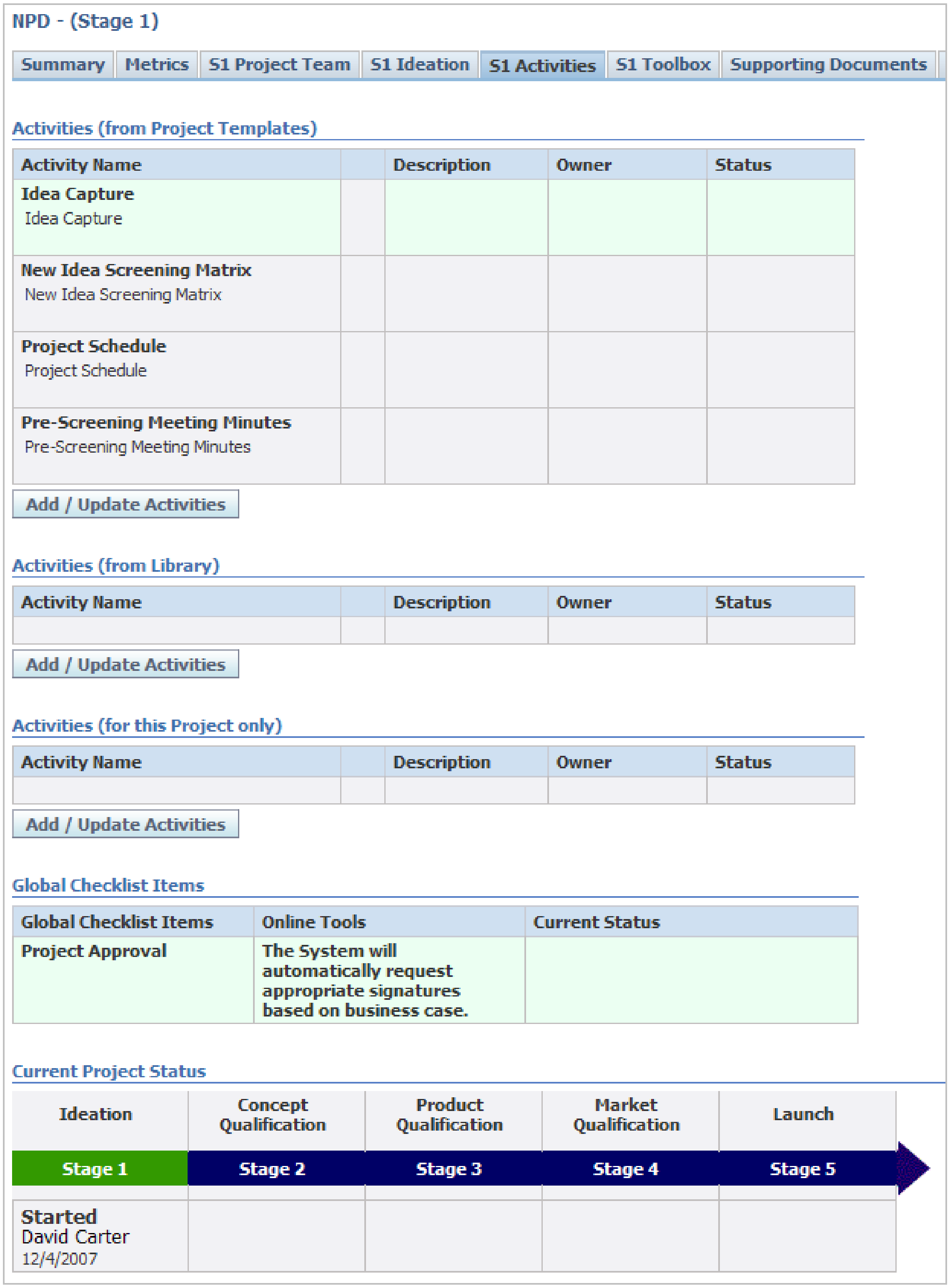
Adding an Activity Template from the Library to a Project

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 5-58 shows below.

Figure 5-58: Activities tab



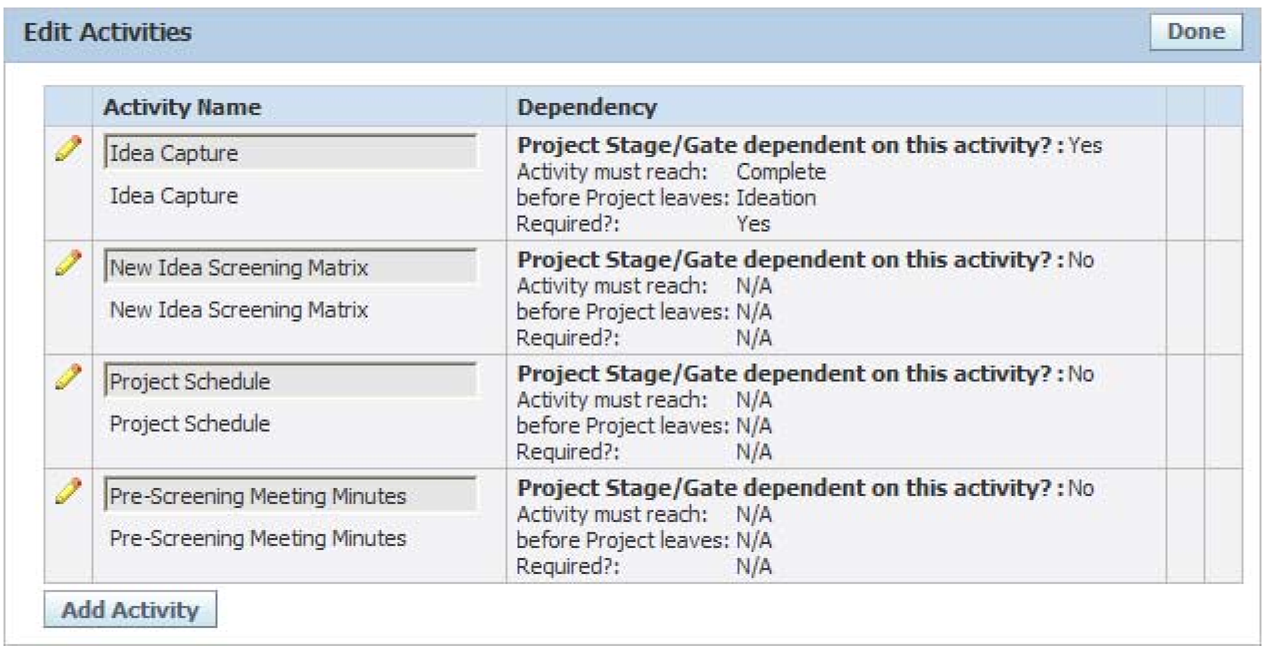
3 Click **Add/Update Activities** below the Activities (from Library) section. The Edit Activities dialog box displays existing activity templates. You can now follow the instructions found in *To add a sub-activity:* on page 5-19 to add the activity.

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 5-59: Add Activity button



5. After adding the custom activity template, enter the project dependency date.
6. To save the row, click the green apply changes icon ( ).
7. Click **Done** to return to the Project page.

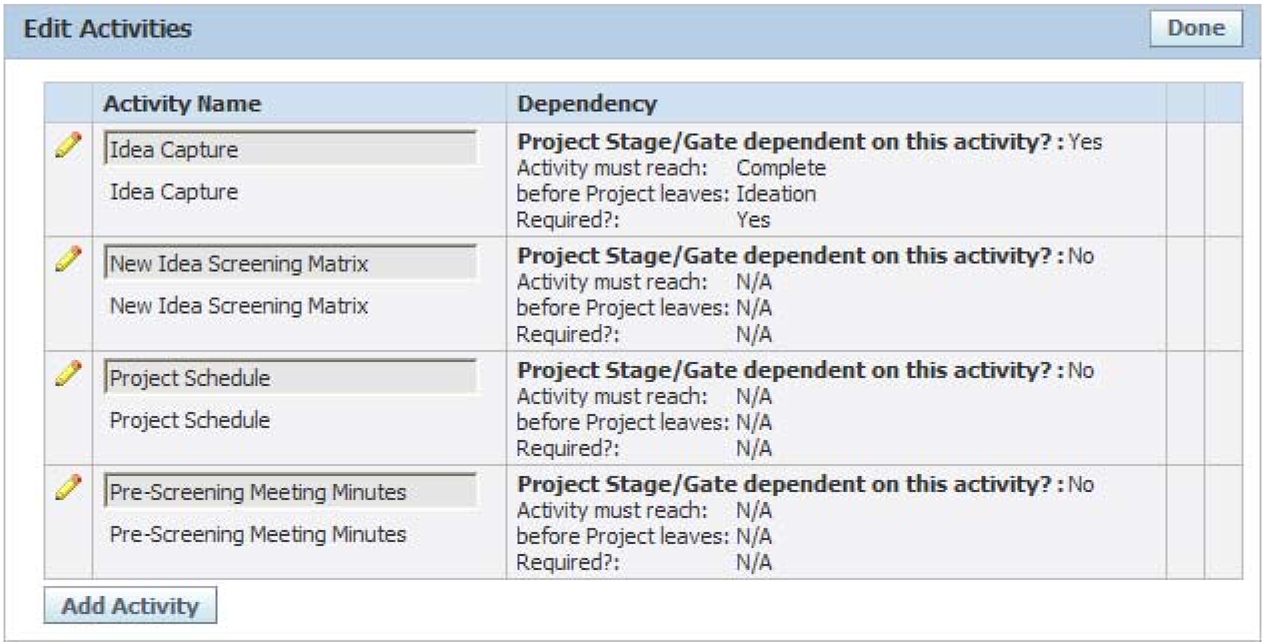
Updating a Project Activity Dependency

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 5-60 below, click the edit icon ( ). The activity displays in edit mode.

Figure 5-60: Activity Name dialog box



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

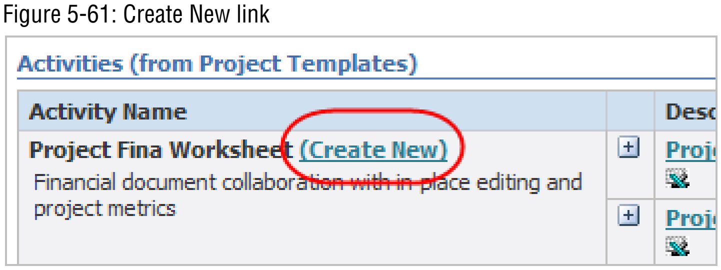
To create a new activity on the project:

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 5-61 shows one activity section:

Figure 5-61: Create New link



A new Activity dialog box is displayed.

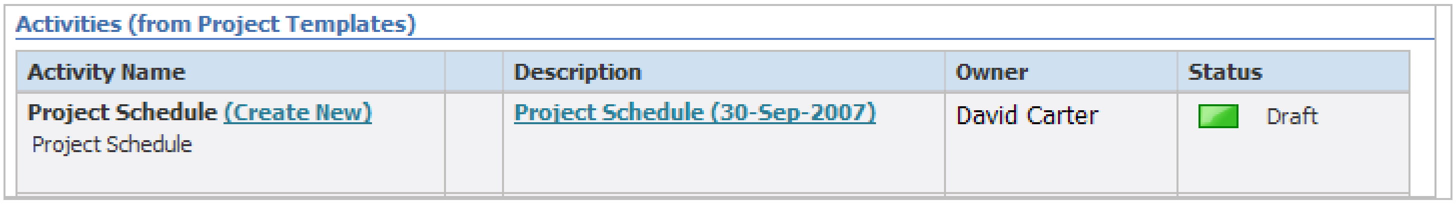
4 Make changes to the activity using the page tabs, then click **Save** or **Save & Close**.

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 5-62: 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 Category 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.

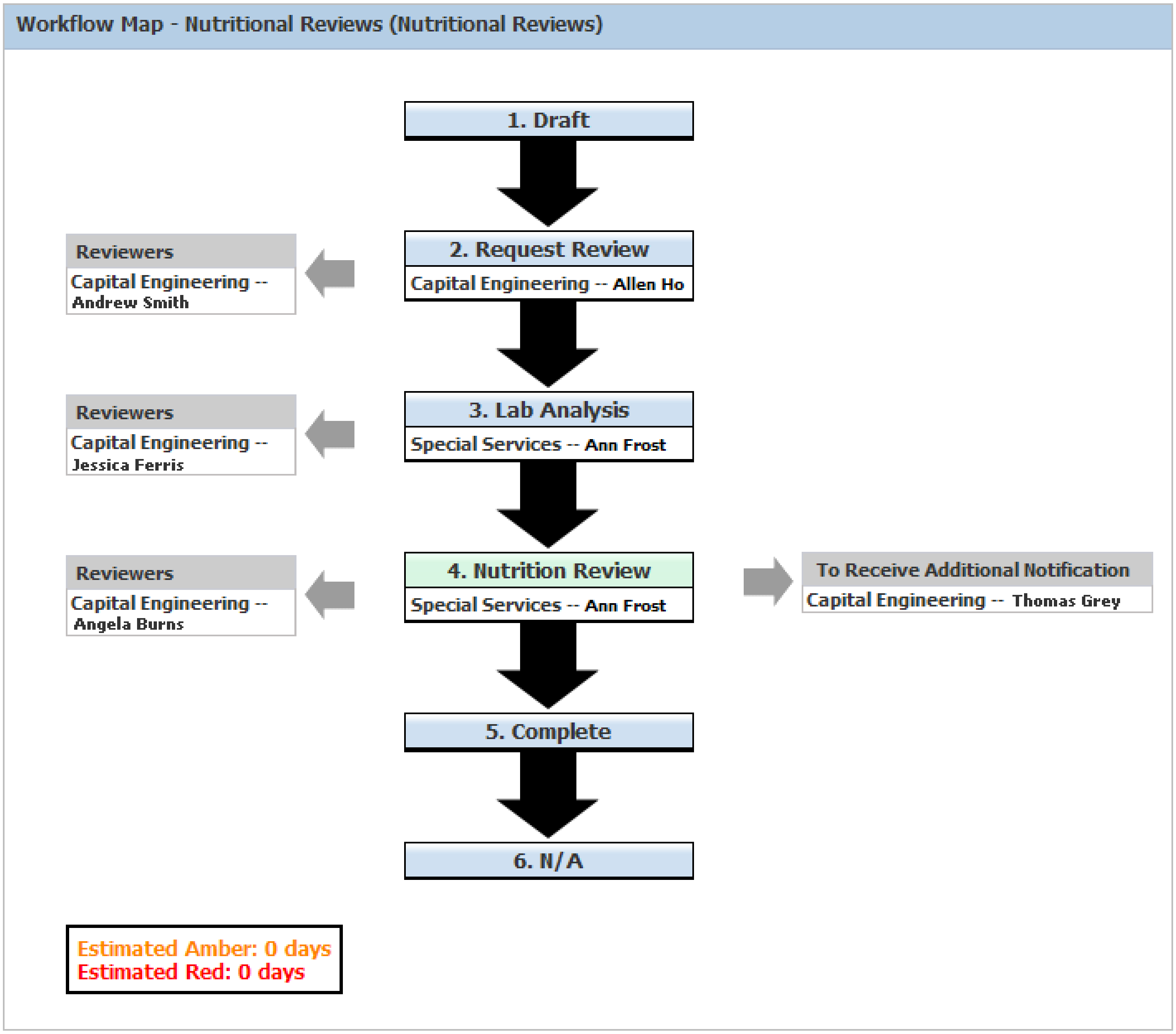
5 Click **Continue**. Two buttons will appear that enable you to continue or cancel.

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 5-63 shows a sample map.

Figure 5-63: Map of activity workflow



CHAPTER 6

Action Items

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

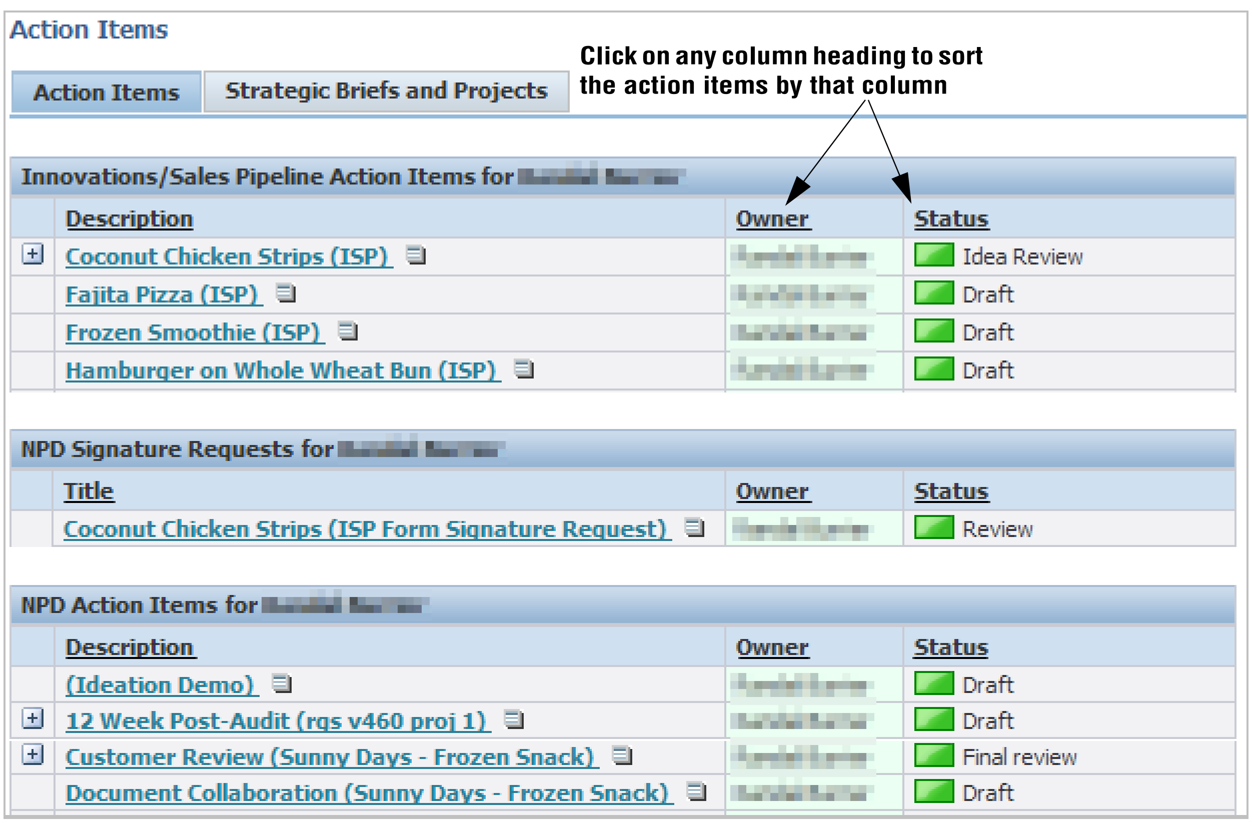
- *Understanding Action Items*
- *Action Items Tab*
- *Strategic Briefs and Projects Tab*

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



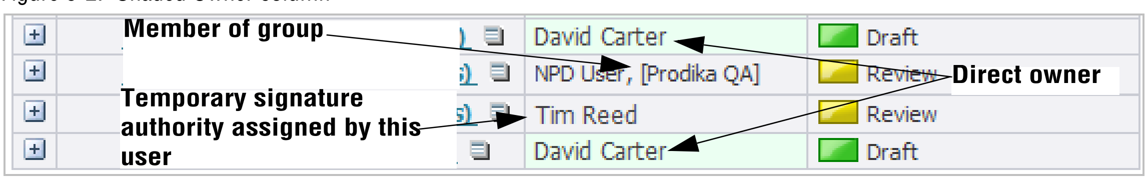
Note Only projects and activities that the user is authorized to see will display on the Action Items tabs.

Action Items Tab

The Action Items tab contains three sections that inform you of outstanding actions for ideas (innovation sales pipelines, or 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



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.

CHAPTER 7

Portfolio Management

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

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:

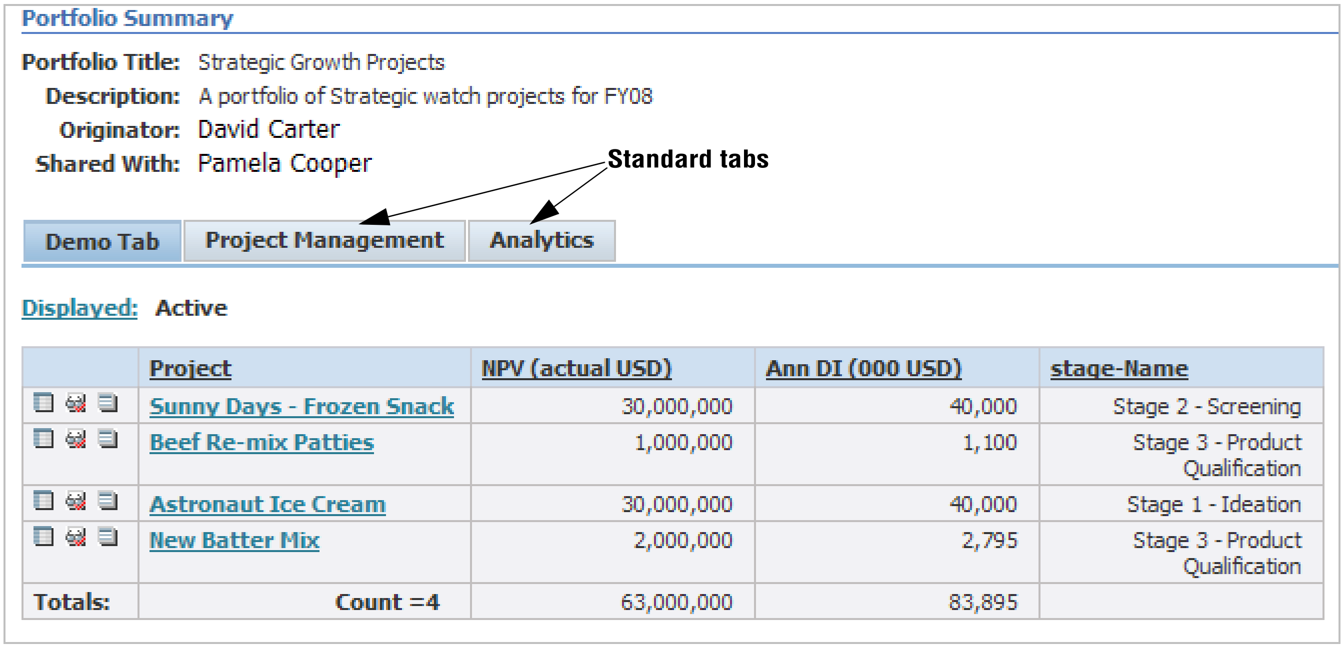
- NPD users may aggregate projects into discrete portfolios for management, reporting, and convenient access.
- Portfolio analytics help quantify the health of projects according to project schedules and discrete activities occurring within each stage.
- Portfolio views provide direct access to supporting 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 financial-based layouts to display selected project data. In figure 7-1 below, the Demo 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



Note For projects marked as Private, the project name displays as "This Project is marked as Private."

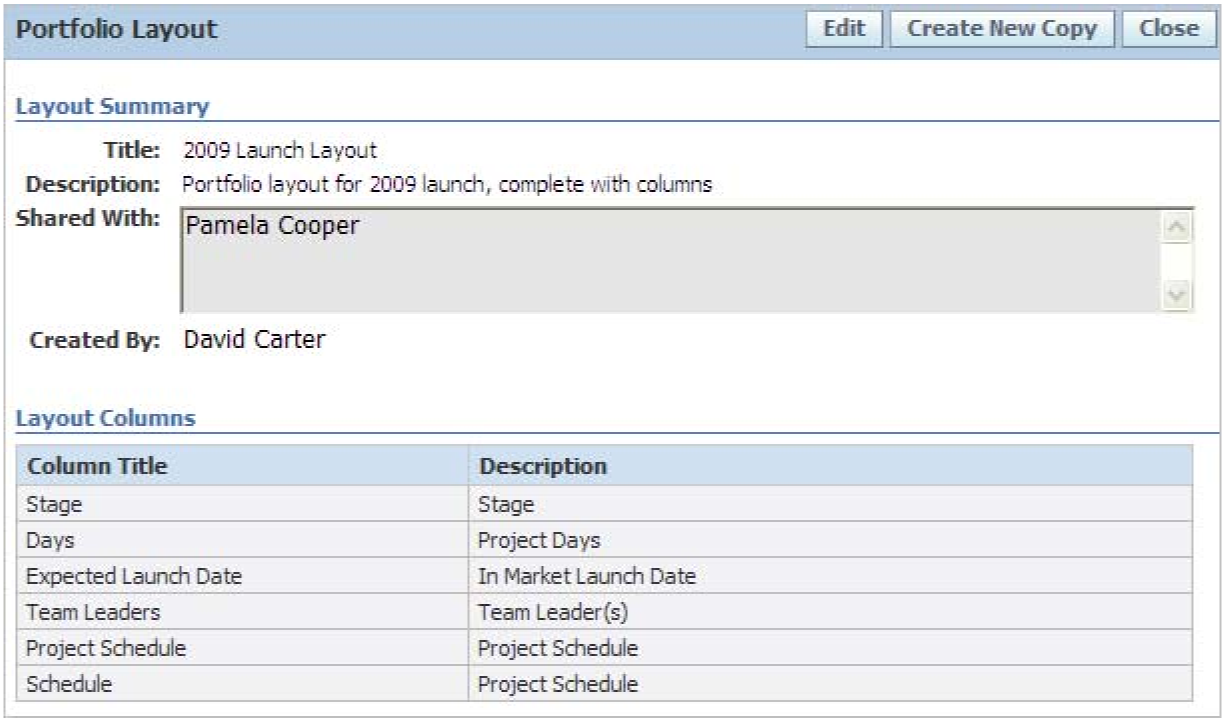
Managing Layouts

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.

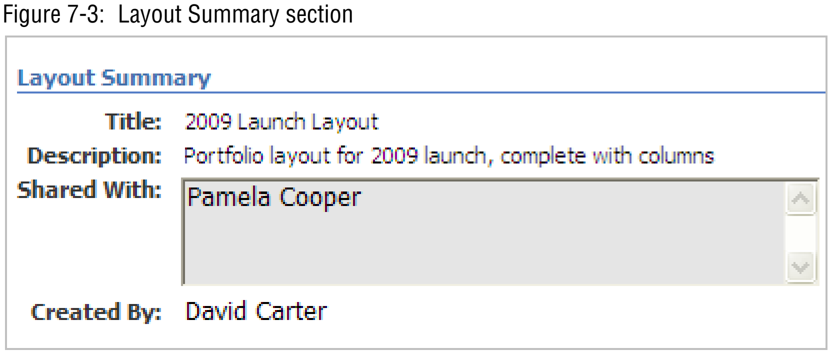
Figure 7-2: Portfolio Layout page



Layout Summary Section

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

Figure 7-3: Layout Summary section



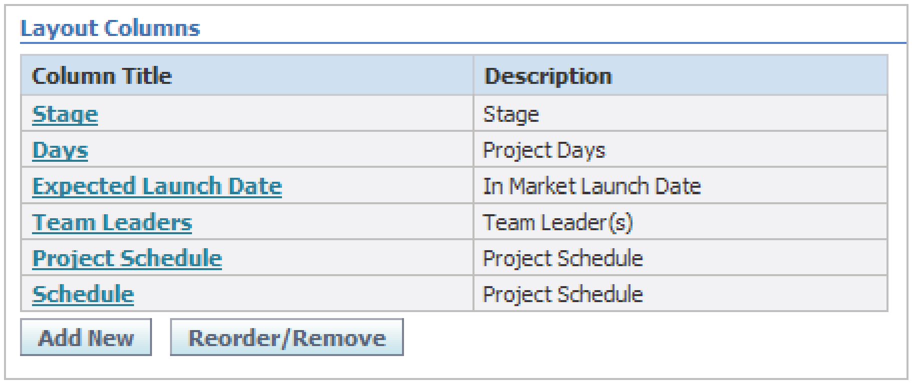
Key fields include:

- **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



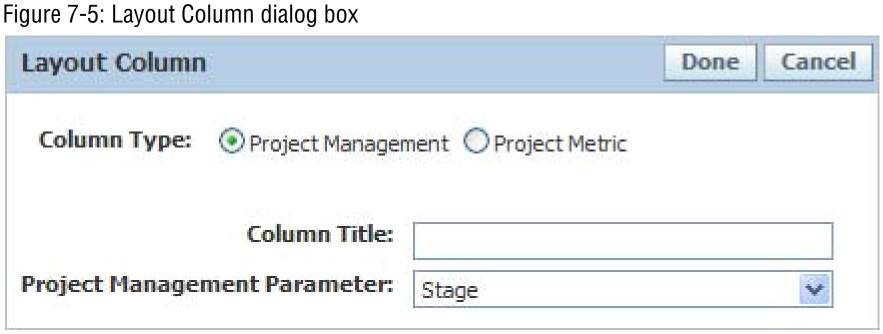
Creating a Layout

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

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

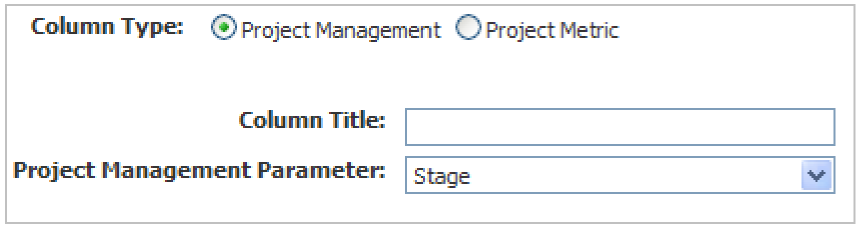
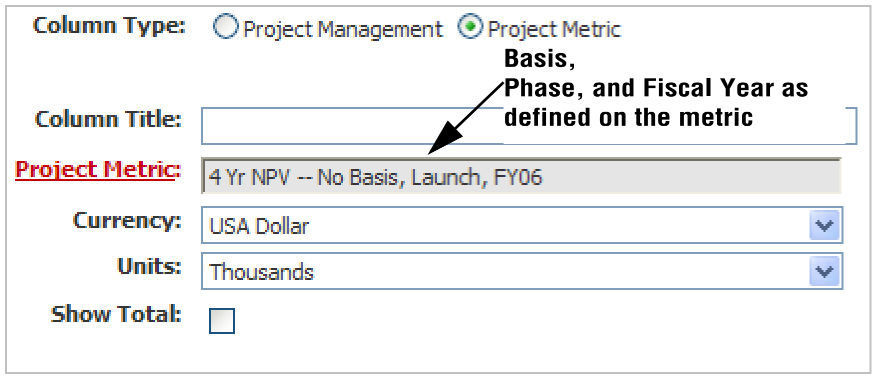


Figure 7-7: Project Metric column type



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

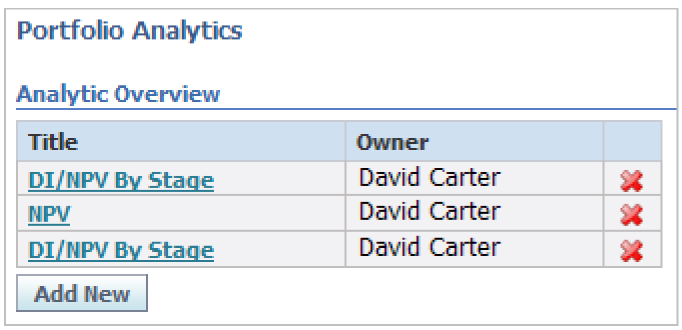
An analytic is a graphical representation of metrics across all projects of the portfolio. The analytic data can be displayed by stage or by project type. Multiple analytics can be displayed on the same graph in varying chart types, such as Line, Column, and Area. Analytics requires the customer purchase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



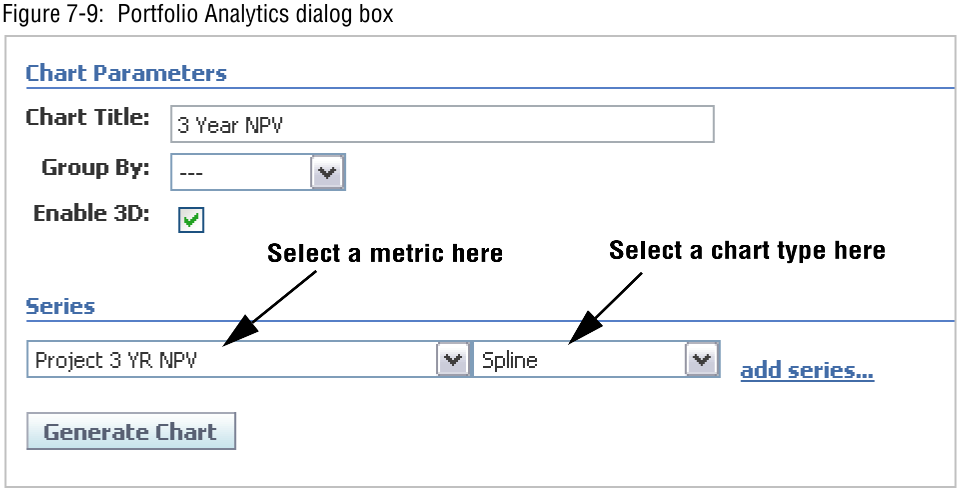
To create a new analytic, click **Add New**.

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



Key fields include:

Chart Title—The analytic will be referred to by this name.

Group By—Select a setting from the drop-down list to determine how the chart should be grouped. Options are:

- **--- (none)**—No groupings; the project displays as a distinct point.
- **Project Type**—The project is grouped by project type.
- **Stage**— The project is grouped by stage.

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

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

Key fields include:

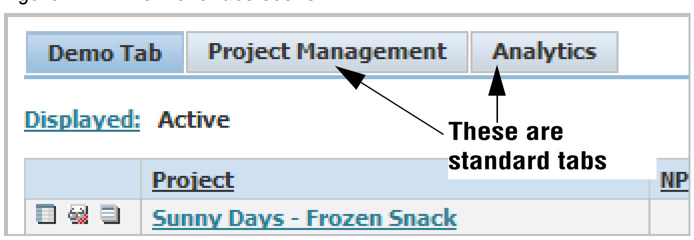
- **Portfolio Title**—The title of the portfolio. This is a required field.
- **Originator**—The originator is automatically defaulted to the user who created the portfolio. It cannot be changed.
- **Share With**—This field determines who has read access to this portfolio.

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

Demo Tab | Project Management | Analytics

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.

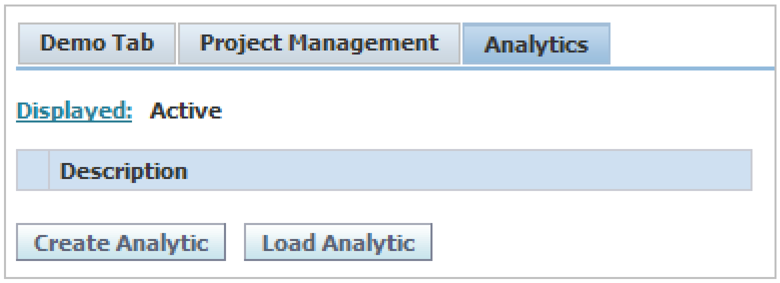
Other key fields include:

- **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



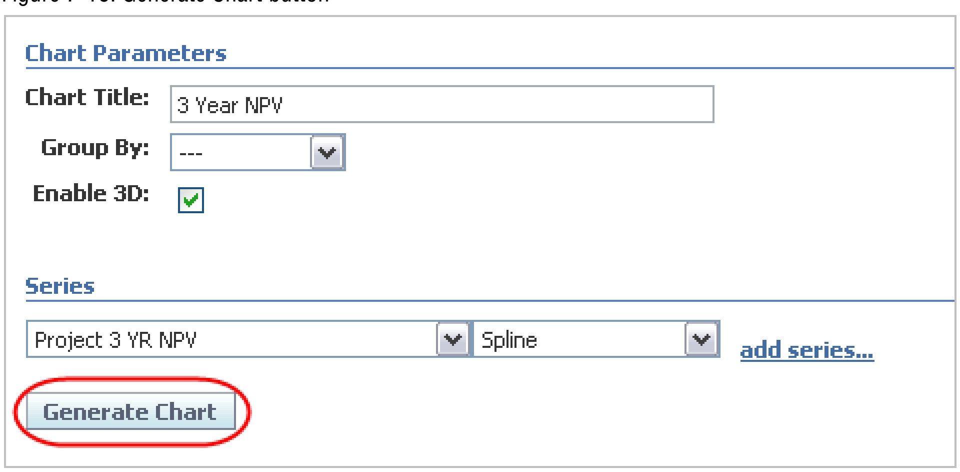
Click **Create Analytic** to create and view the results of an analytic.

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.

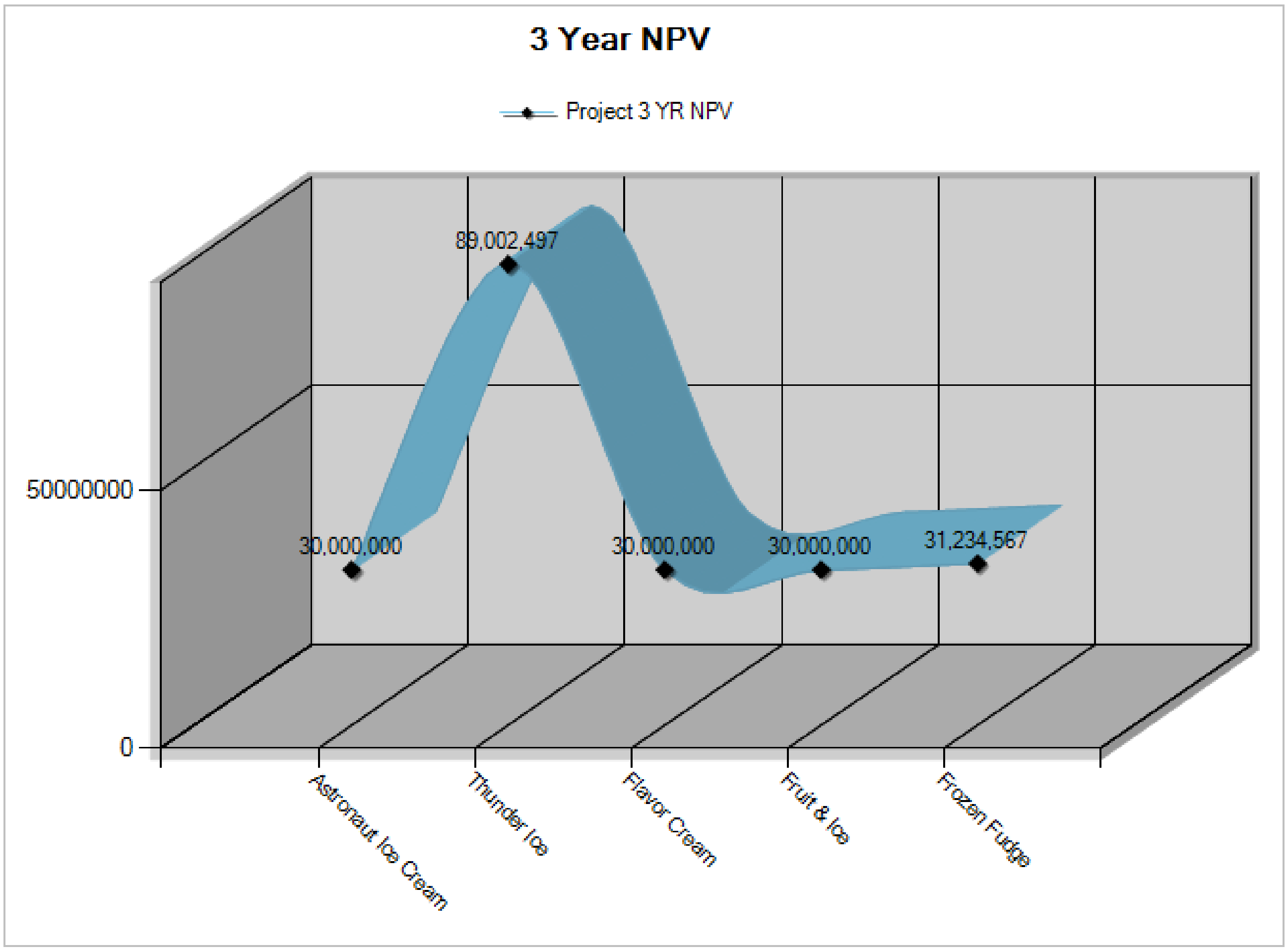
Figure 7-16: Generate Chart button



Group by Project Feature

To view the same data by project, click **---** in the **Group By** field. The result will contain the projects 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 and all their activities that exist in a final state for the portfolio. Figure 7-17 below shows a chart containing data grouped by project.

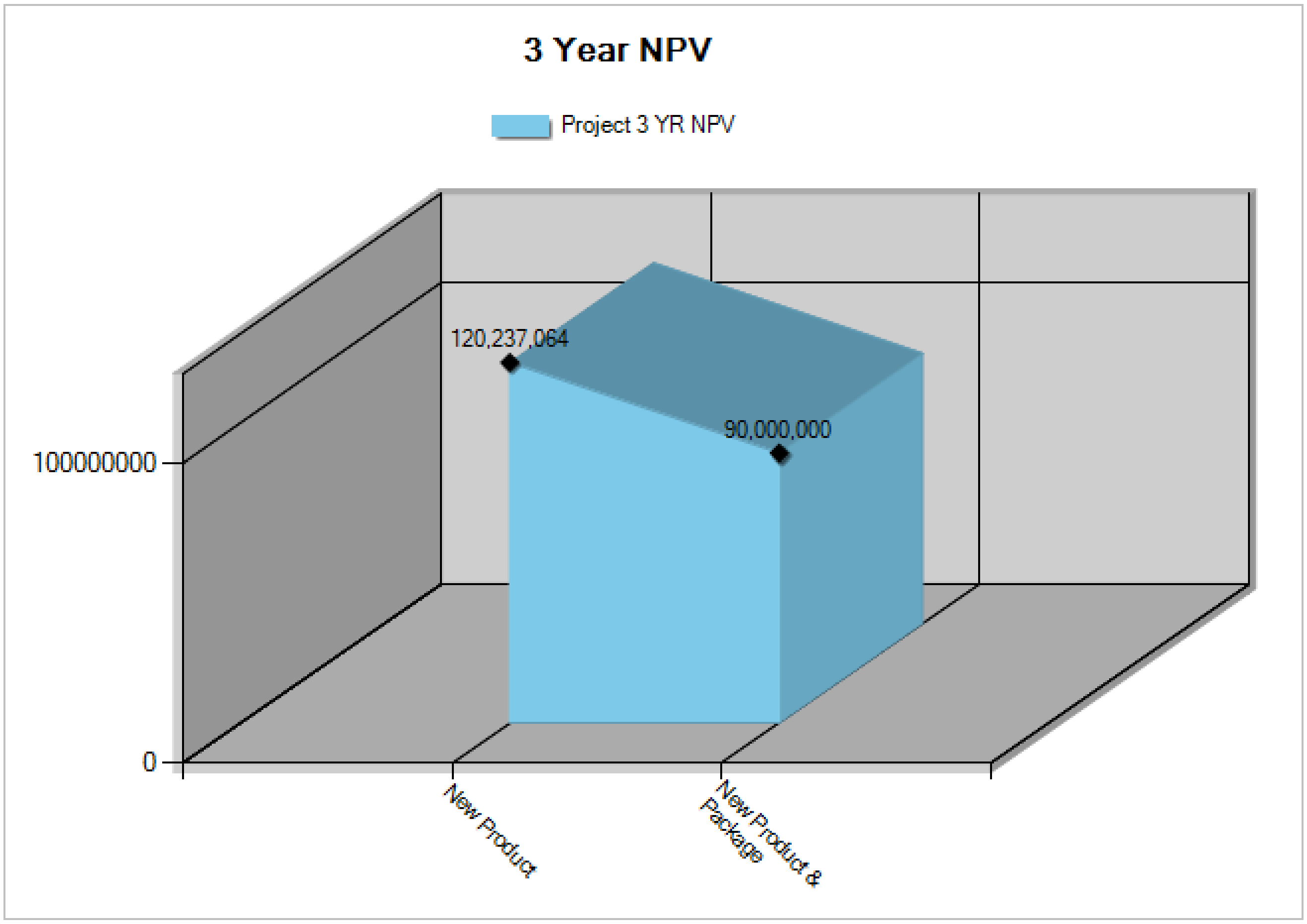
Figure 7-17: Data grouped by project, 3D effect



Group by Project Type 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 type.

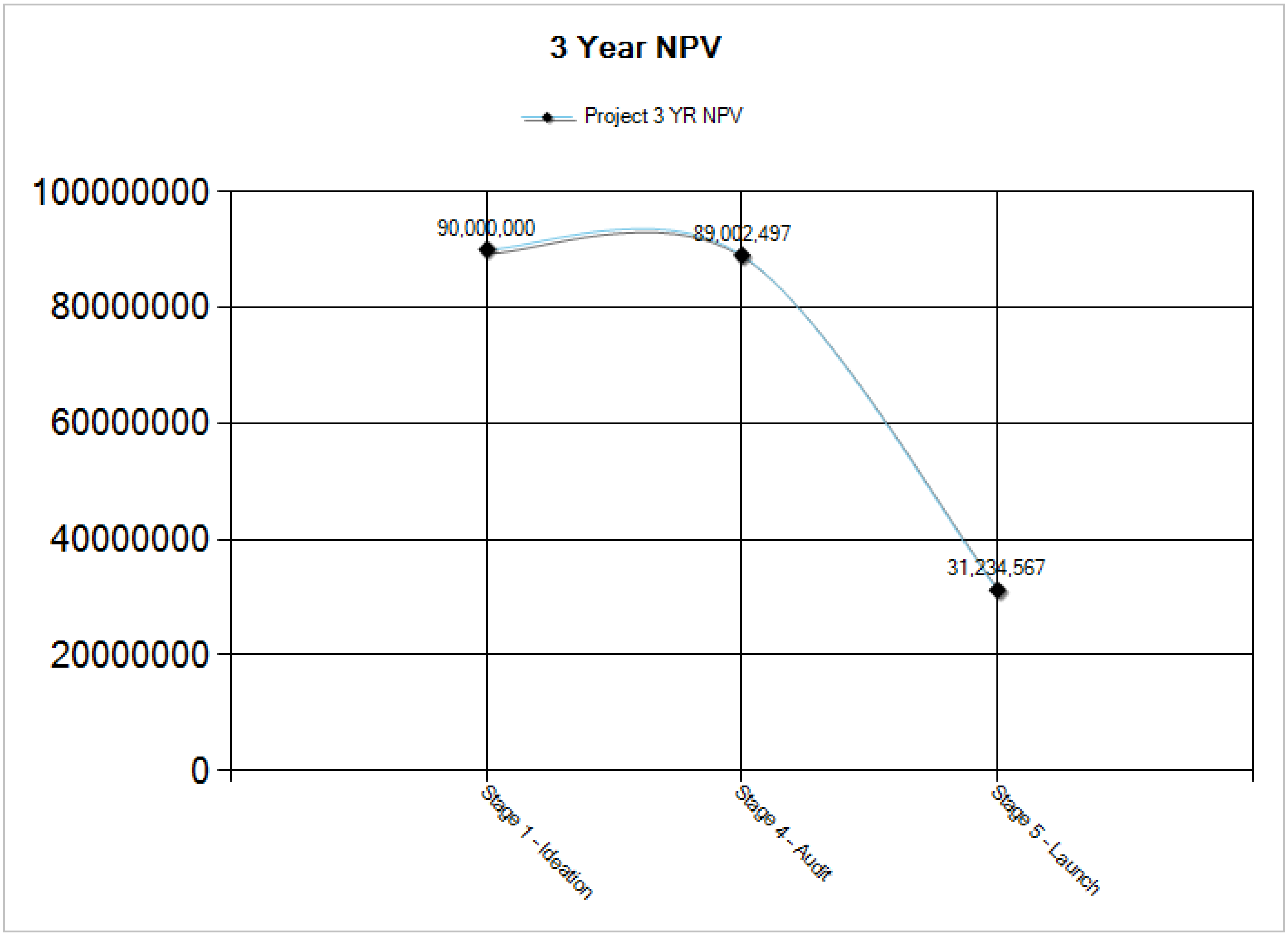
Figure 7-18: Data grouped by project type, 3D effect



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 7-19 shows a chart containing data grouped by stage.

Figure 7-19: Data grouped by stage

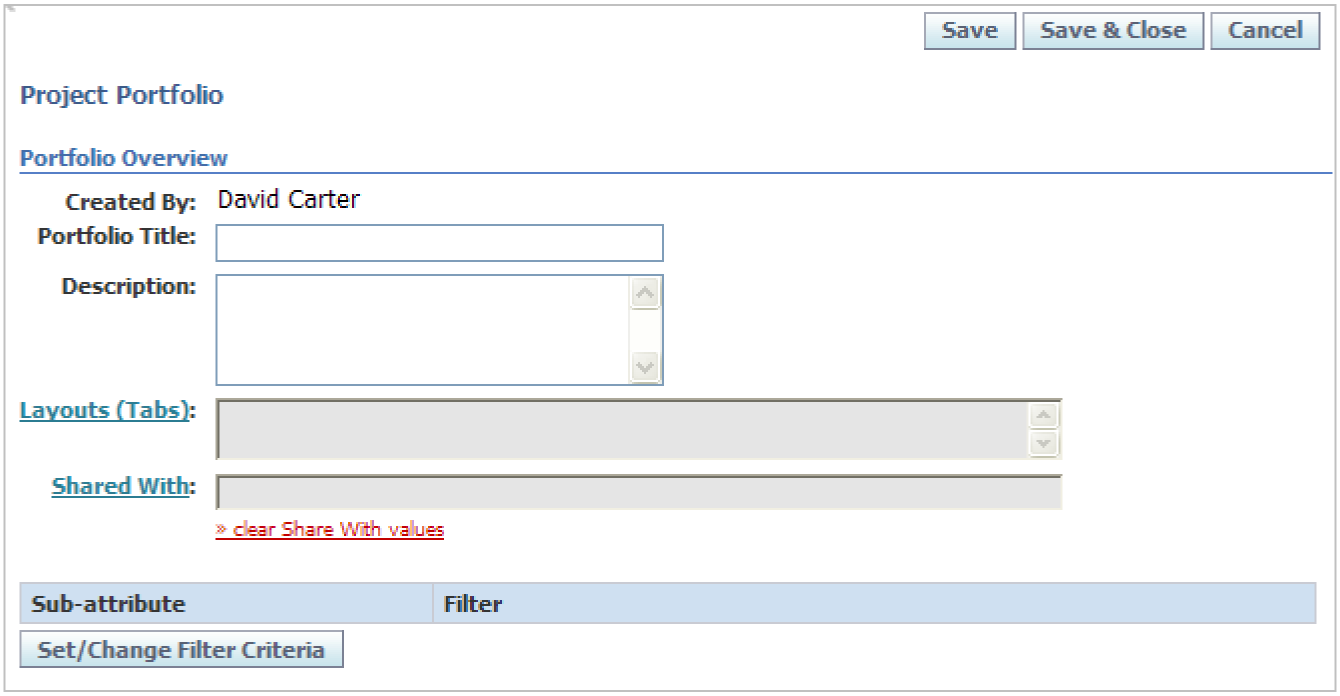


Creating a New Portfolio

To create a new portfolio:

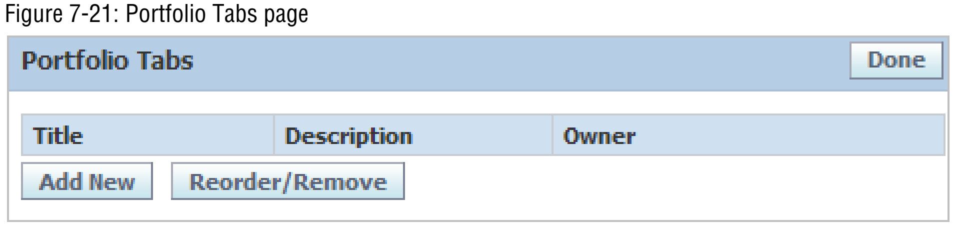
1. Click **Portfolio Mgmt. > Portfolios** in the left navigation panel. A table containing the portfolios that you have access to will be displayed.
2. Click **Add New** displayed at the bottom the table. The Project Portfolio page is displayed, as figure 7-20 shows below:

Figure 7-20: Project Portfolio page



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 7-21: Portfolio Tabs page



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:

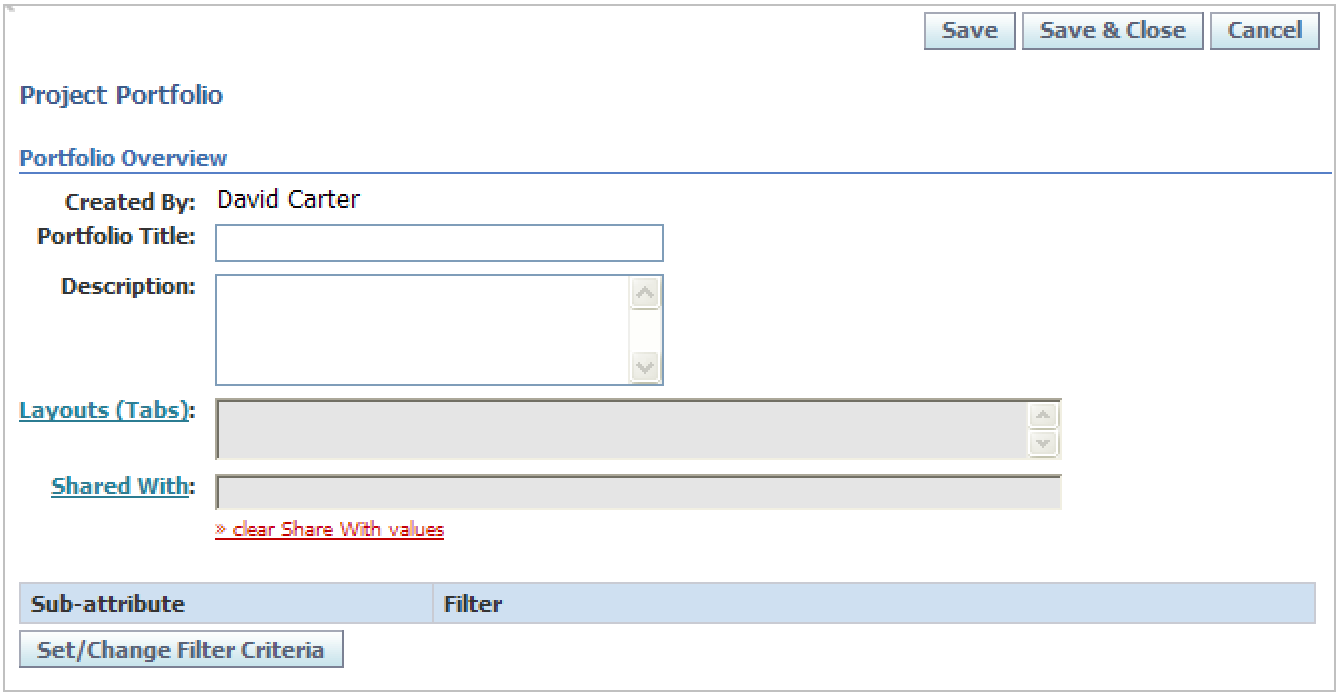
1 Click the **Shared With** link.
2 Search for and select the users that you would like to share the portfolio with.
3 Click **Done**.

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 7-22 shows below.

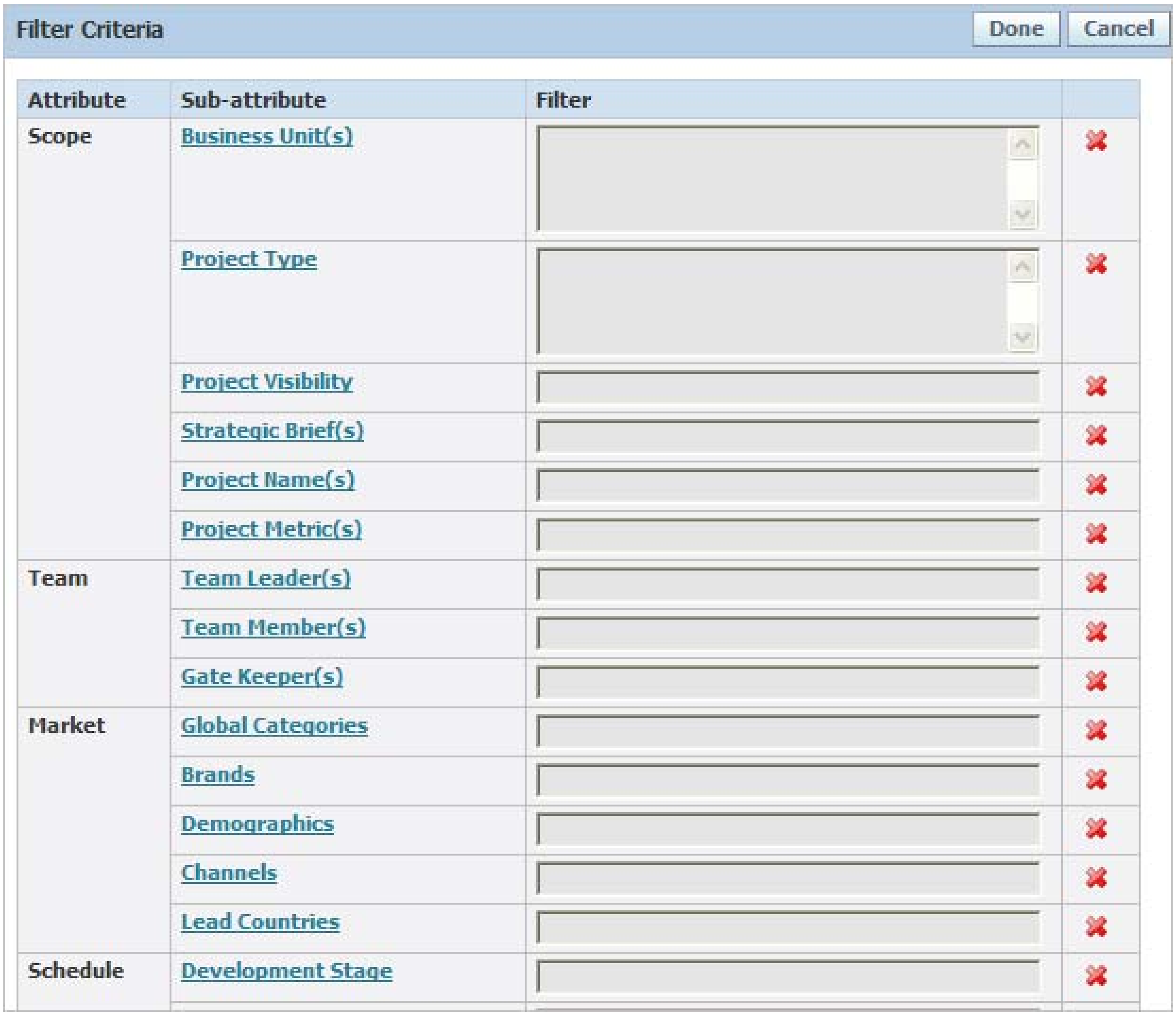
Figure 7-22: Set/Change Filter Criteria button



2. The Filter Criteria dialog box opens, displaying a list of filters, as shown in figure 7-23 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 7-23: Filter Criteria dialog box



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.

CHAPTER 8

Temporary Signature Authority

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

Temporary Signature Authority

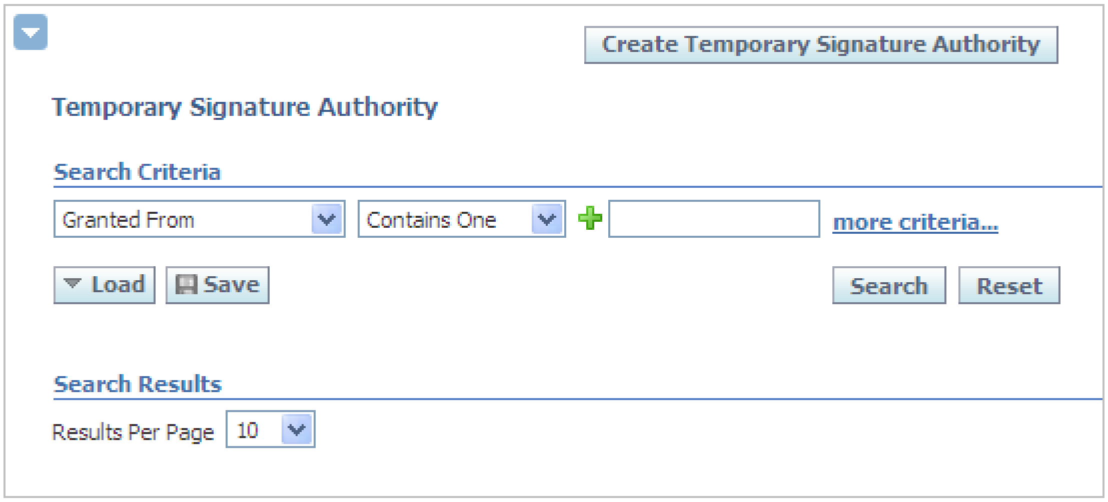
You can use temporary signature authority (TSA) in NPD to grant someone the privilege to act on your behalf for a period of time. This means that a designated user (authority grantee) can approve or disapprove signature requests and manage activity workflow on behalf of you (authority grantor).

- 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.
- Multiple grantors can assign TSAs to the same grantee during the same time period. The grantee receives action items for each TSA.

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**.

CHAPTER 9

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

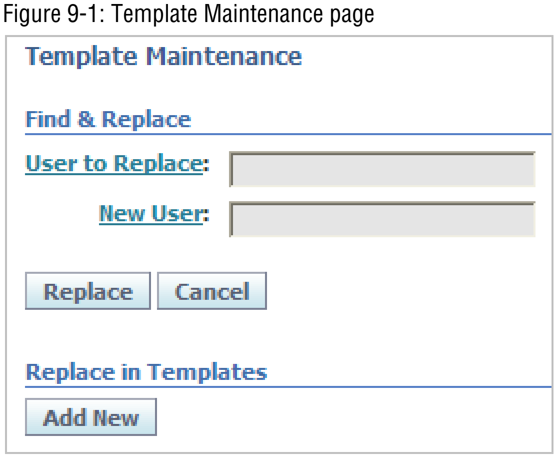
New Product Development's template maintenance feature provides a mechanism to easily replace a user who is a template administrator or part of the team member formulation requirements (TMFR), with another user. You can replace a user across multiple activity templates, ISP templates, project templates, 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.

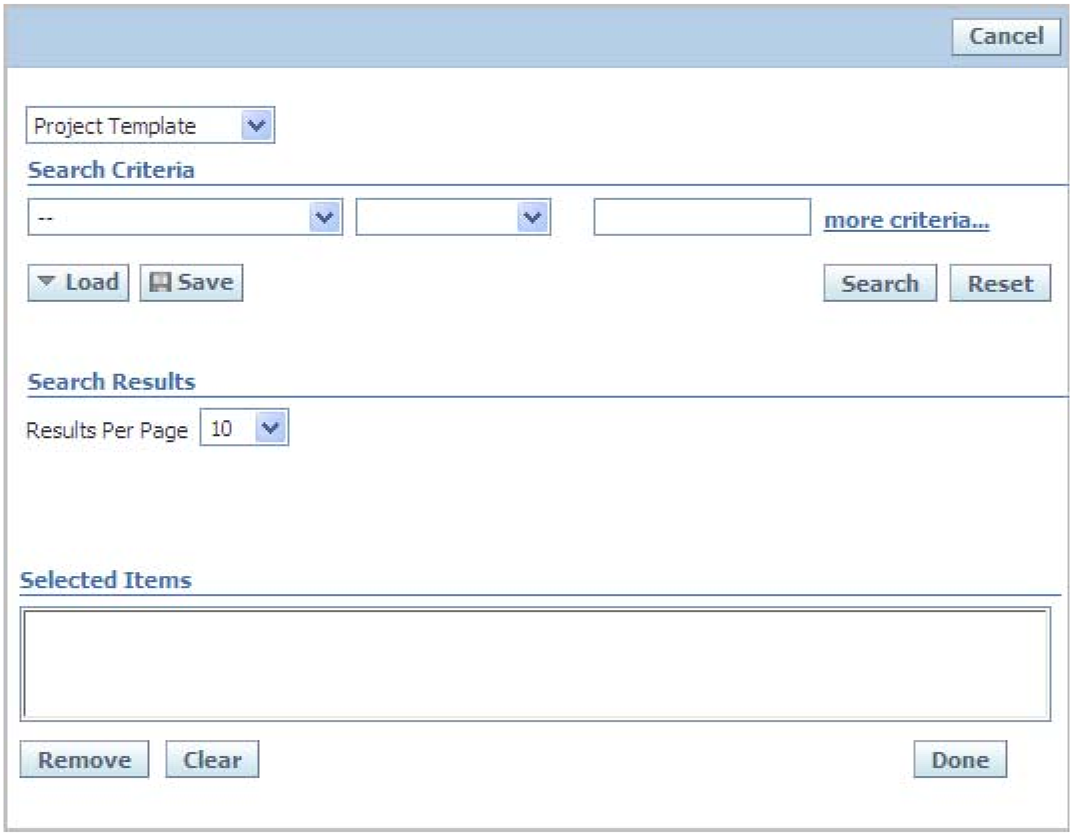
   Figure 9-1: Template Maintenance page

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



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.