

TEAMCENTER

Consumer Packaged Goods — Deployment and Administration

Teamcenter 2412

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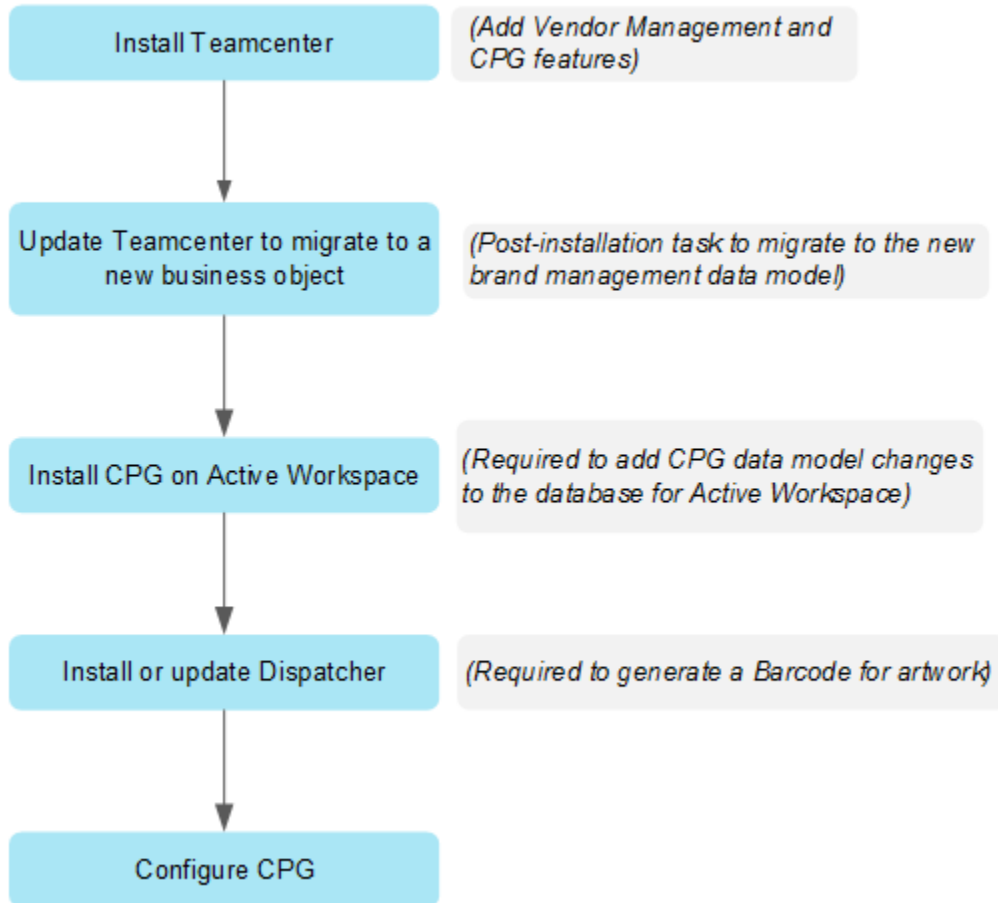


1. Overview of Consumer Packaged Goods

Original brand manufacturers and private label manufacturers of consumer packaged goods, such as those in the food and beverage industries or in the cleaning solution, detergent, paper product, cosmetics, baby care, and skin care segments, contend with challenges to keep up with the trends and demands of the ever-changing industry. They need to create new products and update existing products and packaging based on market trends. Additionally, they must develop new products conforming with regulatory compliance and sustainability standards and taking into account supply chain complexity, industrial productivity, rising commodity costs, and changing customer needs.

The Consumer Packaged Goods (CPG) solution helps you to collaborate on various aspects such as product development, recipe management, artwork, and packaging design of consumer packaged goods.

2. Taskflow to deploy the CPG solution



3. Install Teamcenter for CPG using TEM

To install CPG features, you must have a Teamcenter environment installed on your machine. You can either use an existing environment or create a new one. For detailed instructions on installing Teamcenter, refer to *Teamcenter Installation on Windows Using TEM* or *Teamcenter Installation on Linux Using TEM*.

Run TEM and select the appropriate options until you reach the **Features** panel.

From the **Extensions** navigation tree, select the following options:

- **Supplier Relationship Management**
 - **Vendor Management**
- **Consumer Products and Retail Foundation**
 - **Brand Management** to install the brand management functionality of CPG.
 - **Packaging and Artwork** to install the packaging and artwork functionality of CPG.
 - **Consumer Product Management** to install the product management functionality of CPG.
- **Reuse and Standardization**
 - **Classification Server**
 - **Classification Interface**


From the **Business Modeler IDE Templates** panel, select the following options:

- (Optional) **Business Modeler IDE Templates**
 - **Consumer Products and Retail Foundation**
 - **Brand Management**
 - **Packaging and Artwork**
 - **Consumer Product Management**

4. Install CPG using Deployment Center

Add the Consumer Packaged Goods application to your existing Teamcenter environment.

Procedure

1. Log on to Deployment Center and select the environment to which you want to add **Consumer Packaged Goods**.
2. Go to the **Applications** task. Click **Add or Remove Selected Applications** .
3. In the **Available Applications** panel, use the web browser search to find the **Consumer Packaged Goods** application. Select the application, and then click **Update Selected Applications**.

Deployment Center automatically selects any additional dependent applications.

4. In the **Selected Components** list of the **Components** task, note any remaining components whose configuration status is not **100%**. Select each incomplete component, enter required parameters, and save component settings until all components in the environment show a configuration status of **100%**.

When all components are fully configured, the **Deploy** task is enabled.

5. Go to the **Deploy** task. Click **Generate Install Scripts** to generate deployment scripts you will use to update affected machines.

When script generation is complete, note any special instructions in the **Deploy Instructions** panel.

6. Locate deployment scripts, copy each script to its target machine, and then run each script on its target machine.

For more information about running deployment scripts, see *Deployment Center — Usage*.

5. Update the Teamcenter data model to manage CPG Products

You can update the brand management data model to modify the *Brand Equity* business object of the type *Product Line* into two different business objects, *Brand Equity* and *CPG Product Line*. This data model change allows the users to create and manage CPG products under the business object *CPG Product Line*. Previously, users could create the CPG product under the *Brand Equity* business object.

To migrate to the new brand management model:

1. Update to, or ensure that you have, the latest Teamcenter version.
2. Migrate to the new business object by running the **brndmgmt_productline_migration** utility.

For more information about using this utility, run the **brndmgmt_productline_migration -h** command from the Teamcenter command prompt.

6. Install or update Dispatcher

To generate point-of-sale barcodes, copy asset, and panel you must install Dispatcher as a standalone instance or in an existing Teamcenter environment. If Dispatcher is already installed in your existing Teamcenter environment, you must modify it to include the **Asset Conversion** translator.

When you install Dispatcher and select translators in the installation tool, select the **Asset Conversion** translator.

7. Configuring CPG

Overview of configuring CPG

Configure and set up CPG as follows:

- **Create groups, roles, users, and projects**
- **Create custom classification hierarchy to organize your brand information**
- **Import sample GS1 classification hierarchy**
- **Import sample dimension values for CPG**
- **Map GS1 classification data and dimension values**
- **Set the output format for barcode image**
- **Configure default thumbnails for digital assets**
- **Set up security for digital assets**
- **Assign vendors for external design studios and artwork agencies**

To use CPG on the rich client, you must configure the **package process templates** and the **design and technical templates**.

Create groups, roles, users, and projects

By setting up user management, you can control the functionality that is available to users who are mapped to a specific role, thereby controlling the access to unrestricted data. As an administrator, you create user profiles with different roles, who form the user base of Teamcenter using *Organization*. You can also manage and organize data using *Projects* and grant data access to project team members.

Some of the most common user roles in CPG include:

- Product manager
- Product developer
- Product designer
- Package designer

- Formulation designer
- Artwork designer

As an administrator, you must perform the below tasks for setting up users:

- Create a group
- Create a role
- Create a user
- Add roles and users to groups
- Create a project and assign users to a project.

Create a custom classification hierarchy to organize your brand information

You can create a custom classification hierarchy to organize your brand information using the Classification Admin application. This application is not included with Brand Management. It requires a separate license.

You organize your brand information by creating groups and classes to represent the brand items. For example, you can create a group named *Personal and beauty products group* to organize all the classes of beauty products used by your company, such as haircare, makeup, and skincare. You can also create a subclass for all the classes. For example, for the class *Haircare*, you can create subclasses such as *shampoo*, *conditioner*, and *hair color*.

Use the Classification Admin application to create the custom brand hierarchy by:

1. Creating groups to organize your brand information.
2. Creating classes in the groups to represent brand items.

Example:

For personal care products, you can create the following hierarchy:

```
Personal_and_Beauty_Products (Group)
  Hair_Care (Class)
    Shampoo (Subclass)
```

```
Conditioner (Subclass)
Hair color (Subclass)
```

For food and beverages products, you can create the following hierarchy:

```
Food/Beverage/Tobacco (Group)
  Beverages (Class)
    Alcoholic Beverages (Subclass)
    Coffee/Tea/Substitutes (Subclass)
    Non Alcoholic Beverages - Not Ready to Drink (Subclass)
    Non Alcoholic Beverages - Ready to Drink (Subclass)
```

You can also modify the placement of a group within the hierarchy by changing the group's parent.

Configure default period for released SKUs filter in KPI dashboard

You can set the `Pmg0ItemSKU_released_dashboard_default_timeline` site preference, to set the default period in years for the SKUs released filters in the key performance indicator(KPI) dashboard. For example, setting the **Values** to 10 will set the default period of past 10 years for the SKUs released filters in the KPI dashboard.

Import the sample GS1 classification hierarchy

Teamcenter supports the GS1 Global Product Classification (GPC) standard, which allows global trading partners to group products in the same way universally. To import the sample GS1 classification hierarchy into the Teamcenter environment:

1. Open the Teamcenter command prompt and enter the location where `TC_ROOT`, `TC_DATA`, and `TC_DATA/tc_profilevars` are set.
2. Run the following command.

- **For Windows:**

```
plmxml_import -u=Tc-admin-user -p=password -g=group -xml_file=%TC_INSTALL_DIR%/
pmg0cpgmgmt/samples/cpg_GS1_classification.plmxml -import_mode=overwrite
```

- **For other Operating Systems:**

```
plmxml_import -u=Tc-admin-user -p=password -g=group -xml_file=$TC_INSTALL_DIR/
pmg0cpgmgmt/samples/cpg_GS1_classification.plmxml -import_mode=overwrite
```

Import sample dimension values for CPG

You can import sample dimension values in your Teamcenter environment.

1. Open the Teamcenter command prompt and enter the location where *TC_ROOT*, *TC_DATA*, and *TC_DATA/tc_profilevars* are set.
2. Run the following command.
 - **For Windows:**

```
plmxml_import -u=Tc-admin-user -p=password -g=group -xml_file=%TC_INSTALL_DIR%/
pmg0cpgmgt/samples/cpg_dimensions_keylov.plmxml -import_mode=overwrite
```

- **For other Operating Systems:**

```
plmxml_import -u=Tc-admin-user -p=password -g=group -xml_file=$TC_INSTALL_DIR/
pmg0cpgmgt/samples/cpg_dimensions_keylov.plmxml -import_mode=overwrite
```

Map GS1 classification data and dimension values

To map GS1 classification data with the OOTB dimension values, you must import these OOTB sample preferences in the Teamcenter environment.

1. Open a Teamcenter command prompt and enter the location where *TC_ROOT*, *TC_DATA*, and *TC_DATA/tc_profilevars* are set.
2. Run the following command.
 - **For Windows:**

```
preferences_manager -u=Tc-admin-user -p=password -g=group -mode=import -scope=SITE
-action=MERGE -file=%TC_INSTALL_DIR%/pmg0cpgmgt/samples/cpg_sample_preferences.xml
```

- **For other Operating Systems:**

```
preferences_manager -u=Tc-admin-user -p=password -g=group -mode=import -scope=SITE
-action=MERGE -file=$TC_INSTALL_DIR/pmgo0cpgmgt/samples/cpg_sample_preferences.xml
```

Set the output format for barcode image

In Active Workspace, when a CPG user creates a barcode revision, the system generates the barcode image and attaches that image to the barcode revision.

You can set the barcode image output format using the **PKG_barcode_output_format** preference. By default, the preference value is set to **.svg**. You can change the barcode image format to any of the following supported formats:

- **.svg**
- **.png**
- **.jpeg**
- **.gif**
- **.bmp**

Configure default thumbnails for digital assets

Update the **TC__thumbnail_relation_order** preference to specify which relations to parse to find thumbnails for the digital assets.

You must manually add the relation **Pka0DgtAssetRepresentation** to this preference after installing Consumer Packaged Goods.

Set up security for digital assets

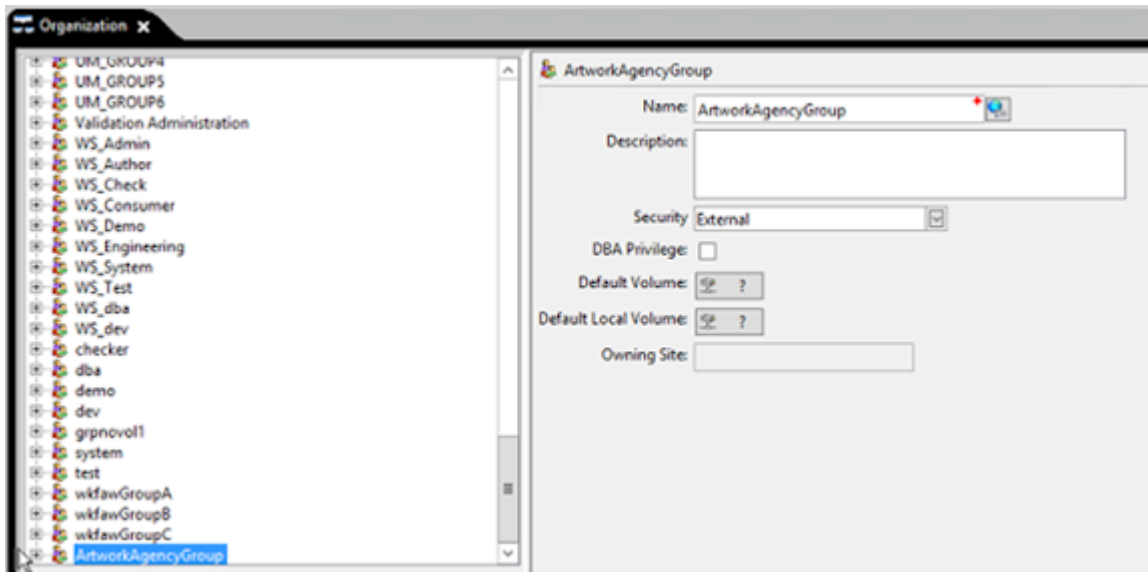
CPG users can manage a digital asset library across departments and partners by configuring security permissions for each digital asset.

To assign digital assets to a project with specific user permissions, you must create a user's group with external security, set the user's role, assign users to this group, and create projects with specific user permissions (global or unrestricted) in Teamcenter Rich Client as explained below:

Create a group with external security

1. Log on to the rich client.
2. Start the **Organization** application.
3. From the **Organization List** tree, select the top-level group node.

The **Groups** pane appears.

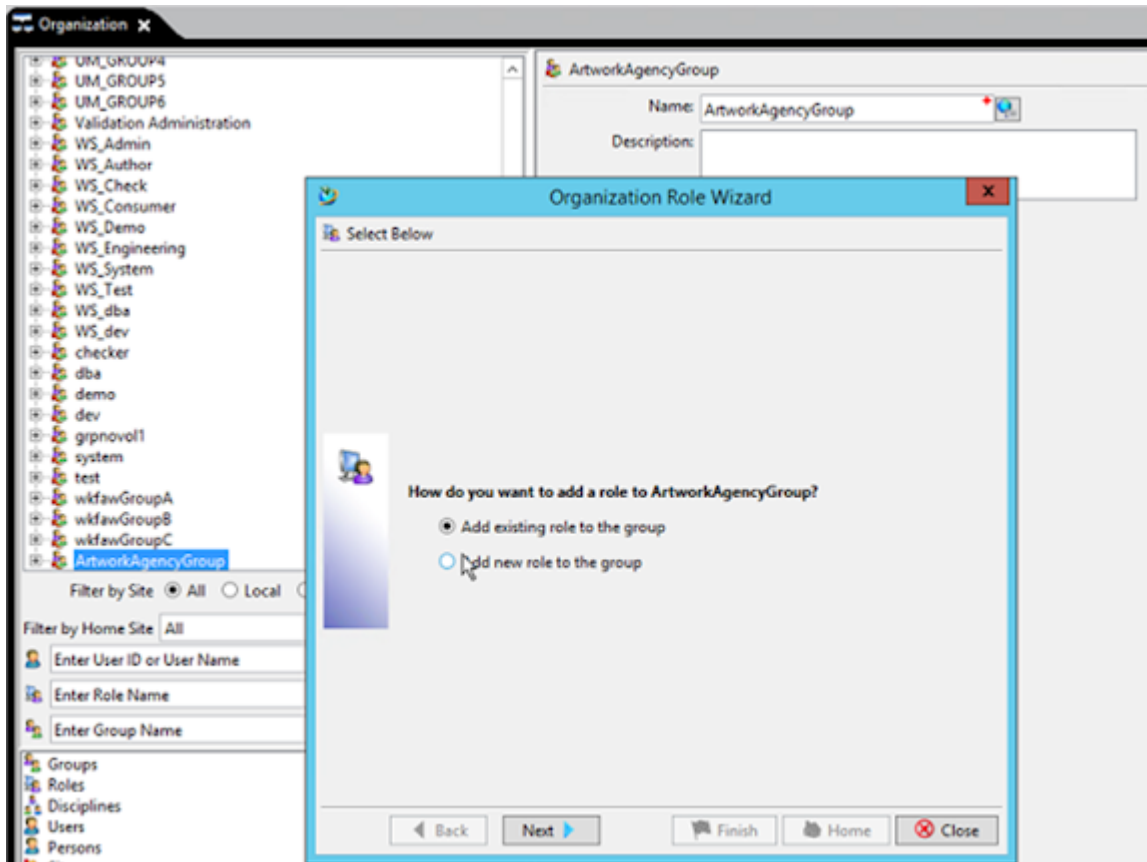


4. In the **Name** box, type a group name and set security for group as **External**.

Assign roles to a group

1. Select the group node in the **Organization** tree to which you want to add the role.
2. In the **Groups** pane, click **Add Role**.

The **Organization Role** wizard appears.



3. Select **Add new role to the group** and click **Next**.

The first role added to a group becomes the default role for that group.

4. Provide the required information and click **Close** to create the new role, or click **Finish** to perform another action.

You can use the **Organization Role** wizard to add a new role to a group during the process of creating the group or subgroup in the tree.

Assign users to a group

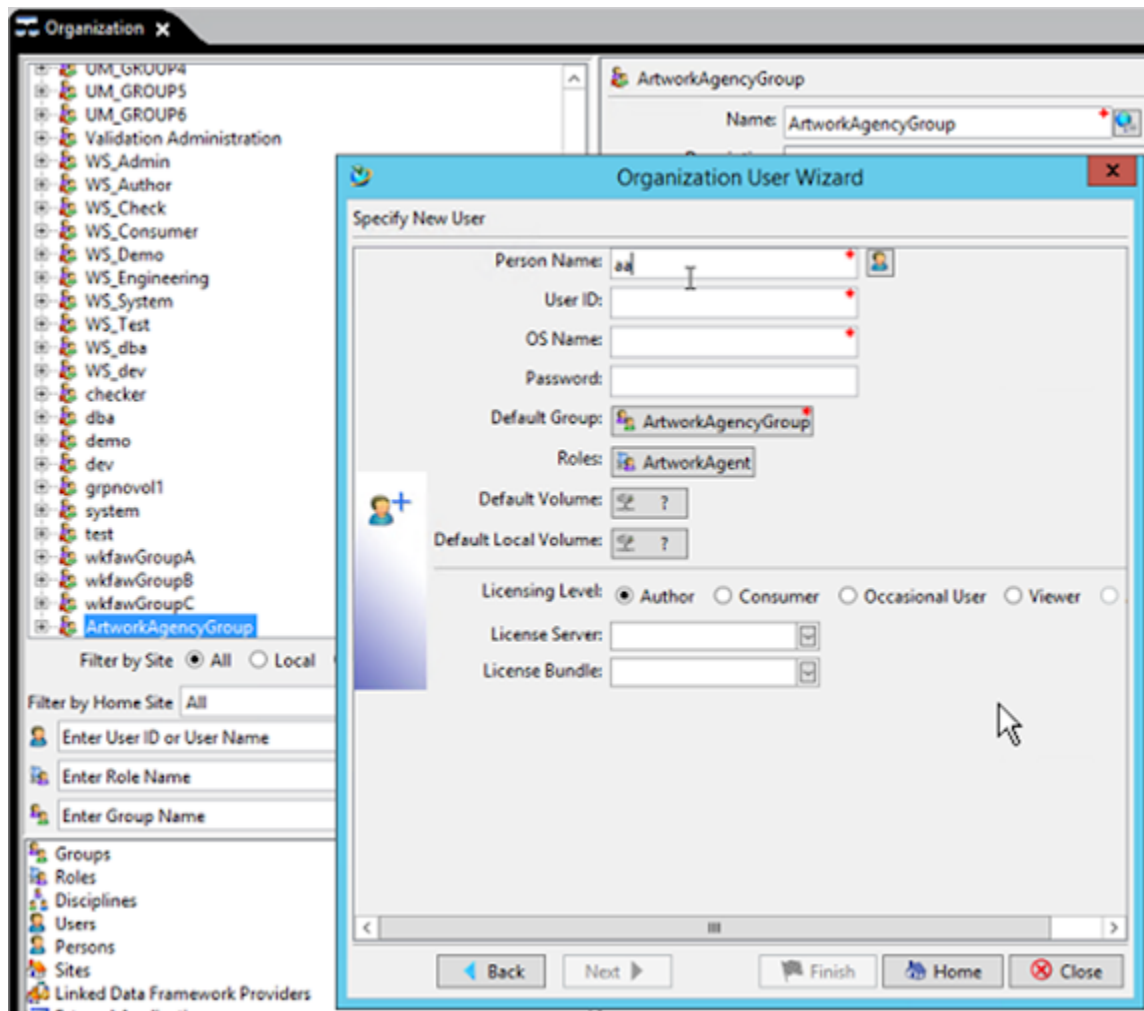
You can add a new user to the **Organization** tree as part of the process of creating the group or role hierarchy.

- Select a role node from the **Organization** tree.
- In the **Roles** pane, click **Add User**.

The **Organization User** wizard appears.

- Select **Add new user to the group/role** and click **Next**.

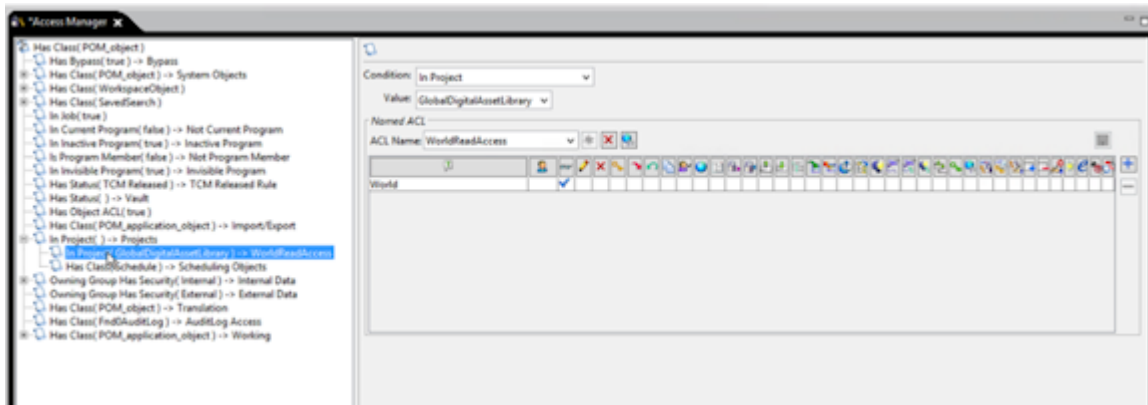
- Create the user by providing details in the **Specify New User** pane.



After providing the required information, click **Next** or **Finish**.

Create a project

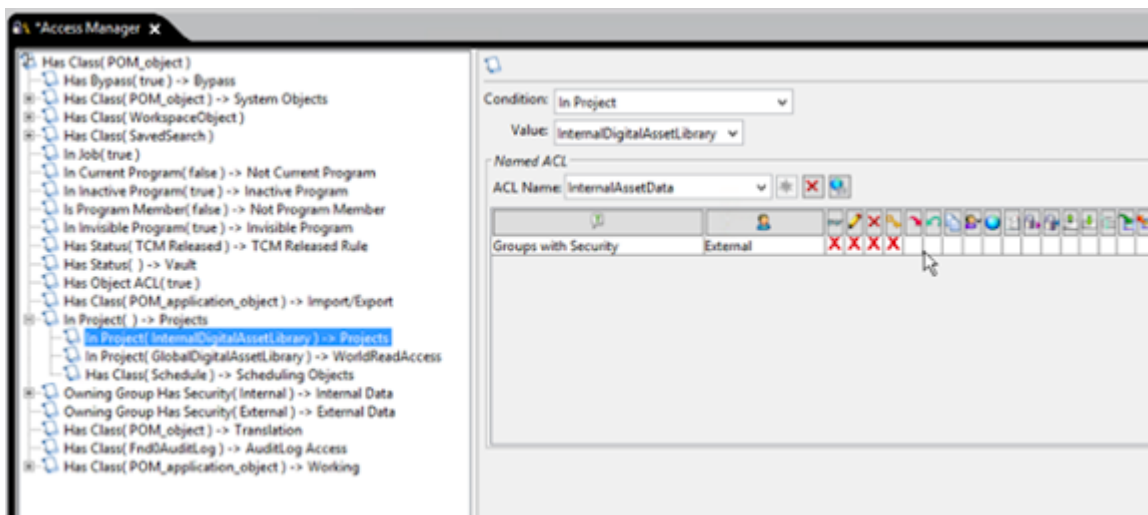
1. Log on to the rich client.
2. In the **Project** application, create a new project.
3. Assign users or a group of users to the project. In the **Member Selection** pane, add privileged users to the project.
4. Select **World** read access if you want all users to have access to view the digital assets associated with the product. Partners will also have permissions to view the digital assets.



CPG users can assign the digital assets to this project in Active Workspace to allow partners to view the digital assets.

OR

Select **Groups with Security** to provide unrestricted access to the digital assets. Only unrestricted users can access digital assets based on the settings.



CPG users can assign the digital asset to this project in Active Workspace to restrict the access to internal users only.

Assign vendors for external design studios and artwork agencies

CPG users can create and manage briefs to share digital assets and other information for the development process of packaging and artwork. This involves external design studios and artwork agencies. The briefs are sent through a workflow to the associated vendors.

To support partner interaction for creating package and artwork designs, you must first create vendors for external partners such as the design studios and the artwork agencies in Active Workspace or in

Rich Client. For more information on creating a vendor for external partners and assigning the project to that vendor, refer to the Consumer Packaged Goods on Active Workspace — Usage help in the Active Workspace help collection or the Consumer Packaged Goods on Rich Client — Usage in the Teamcenter help collection.

After creating the vendor, you must assign this vendor a **Design Studio** role or an **Artwork Agency** role in Rich Client.

1. Log on to the rich client as an administrator.
2. Select the vendor revision and click **Tools > Vendor Management > Add Vendor Role**.
3. In the **Add Vendor Role** dialog box, under **Select Vendor Role**, select the **Vendor Role Name** as **Design Studio** or **Artwork Agency** from the list.
4. Click **OK**.

Configuring Consumer Packaged Goods for the rich client

Overview of configuring CPG for the rich client

For using the CPG features in the rich client, you must make the following configurations:

- **Create an initiative folder** to group all the templates.
- **Create package process template**
- **Set up design and technical brief templates**

Create an initiative folder to group templates

To manage and group all the templates you create for CPG, you can create an initiative folder in Teamcenter.

1. Choose **File**→**New**→**New Folder**.
2. In the **Name** box, type a folder name.
3. In the **Description** box, type a brief explanation of the folder contents.
4. Click **OK**.

Create a package process template

You must create a process template that tracks the various stages of the product or package development process.

1. Create a schedule template.
2. Add tasks and milestones to the schedule template.

Set up design and technical brief templates

A design brief captures design requirements of a package, whereas a technical brief captures technical requirements of a package. Design and technical brief templates can be created in two ways:

- **Using the Systems Engineering application**
- **Attaching a document to a design/technical brief item revision**

Create design and technical brief templates with Systems Engineering

1. Start the Systems Engineering application.
2. Click the **Import a specification** link in the Systems Engineering welcome pane.
3. Click the browse button (...) to display the **Choose the file to import** dialog box. Browse to and select the file (design/technical brief template), and then click **Import**.
4. From the **Spec type** list, select the specification type.

Select **Technical Brief** for the technical brief or **Design Brief** for the design brief.

5. Click **Next** to display the **Select Import Options** dialog box.
6. Select **Requirement** as the subtype.
7. Click **Finish**.

The design or technical brief template is created.

8. Copy the design or technical brief template to the initiative folder.

Create design and technical brief templates by attaching a document to a package item

1. Navigate to the initiative folder.

2. Choose **File**→**New**→**Item**.
3. In the **New Item** dialog box, select **Design Brief** for the design brief or **Technical Brief** for the technical brief.

Click **Next**.

4. Type the item ID, revision ID, and the item name.

Click **Finish**.

A new design or technical brief item is created.

5. Attach the design or technical brief template to the newly created design or technical brief item.