TEAMCENTER

Initiative Lifecycle Management — CPG Reference Implementation

Teamcenter 2412

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Contents

1. Initiative Lifecycle Management - Consumer Packaged Goods Reference Implementation overview

What is Initiative Lifecycle Management - Consumer Packaged Goods Reference Implementation?

The Initiative Lifecycle Management - Consumer Packaged Goods Reference Implementation (ILM - CPG Reference Implementation) product is an implementation of the Initiative Lifecycle Management (ILM) product with components and processes specific to the Consumer Packaged Goods industry. While ILM leverages Program Planning capabilities and combines those with functional process groups that distribute work to the disciplines involved, the ILM - CPG Reference Implementation provides industry-specific process groups, such as those specific to packaging, artwork, and consumables. In addition, the solution provides a phase-gate approval process for ideas and other sample workflows and consistency checks.

Where do I go from here?

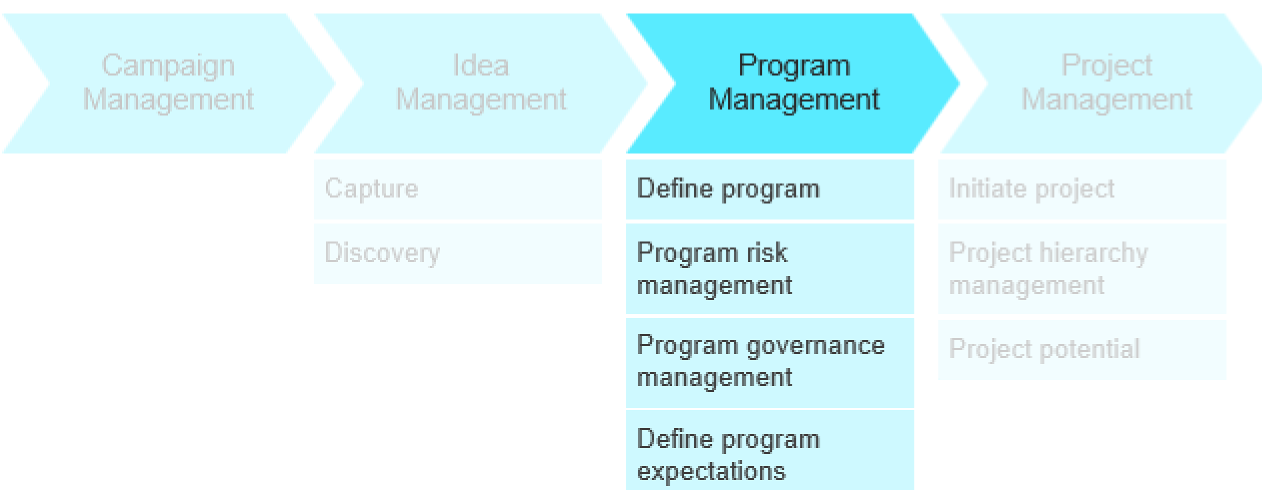
Administrator	
Install Active Workspace and ILM - CPG Reference Implementation.	Refer to the following: • Active Workspace installation on Windows and Linux. • Initiative Lifecycle Management - Consumer Packaged Goods Reference Implementation installation
Business User	
Get started with the basics of using Active Workspace.	Refer to Active Workspace Fundamentals.
Get familiar with the Active Workspace page layout.	See the section describing the page layouts.
Use the ILM - CPG Reference Implementation solution.	Start by authoring requirements specifications.

Understanding the business process

ILM - CPG Reference Implementation unifies all relevant business processes from ideation to production into a single adaptive system while providing objects specific to the Consumer Packaged Goods industry.

Program Management

The business process for program management involves orchestrating several related projects.

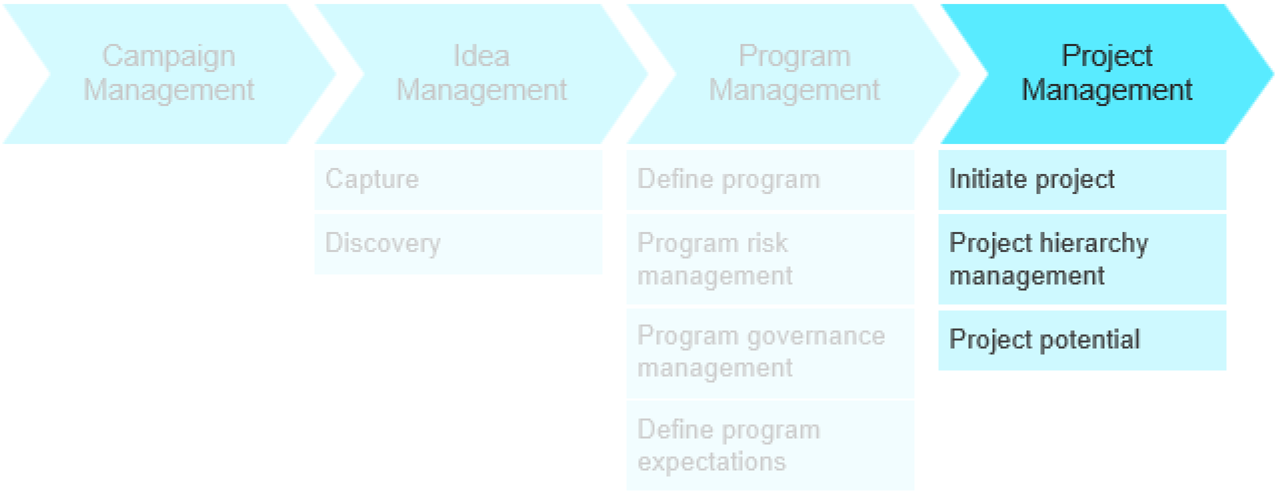


Using program management, you can:

- Create a hierarchy to associate projects and their functional process groups to programs.
- Define a program governance team.
- Set program expectations.
- Identify program risks.

Project Management

The business process for project management involves initiating, planning, executing, and closing process groups assigned to different disciplines to deliver results within a specific time period.



Using project management, you can:

- Create projects systematically based on the acceptance of ideas or project requests.
- Set project potentials and compare them to program expectations.
- Manage project development briefs.

2. Installing and administering the ILM - CPG Reference Implementation

Installation and prerequisites

> Note:
>
> ILM - CPG Reference Implementation requires the Initiative Planning and Initiative Lifecycle Management solutions. Refer to the Initiative Planning and Initiative Lifecycle Management help for details about these prerequisite solutions.

To install ILM - CPG Reference Implementation, select the following applications:

- Teamcenter
  - Active Workspace
    - Initiative Planning Active Workspace
    - Initiative Lifecycle Management (ILM) Active Workspace
    - Initiative Lifecycle Management - CPG Reference Implementation Active Workspace
  - Foundation
    - Initiative Planning
    - Initiative Lifecycle Management (ILM)
    - Initiative Lifecycle Management - CPG Reference Implementation

> Note:
>
> Refer to Price book for prerequisite products.

Importing the ILM sample data

Sample data for business processes

> Warning:
>
> Siemens Digital Industries Software recommends that you load sample data only in an evaluation environment for reference and tutorial purposes. The sample data script sets the importing environment as a test environment, and this action cannot be reverted.
>
> Use the sample data in a new Teamcenter installation to avoid the clashing of sample data IDs with existing data.

The ILM - CPG Reference Implementation includes the following Teamcenter data samples:

- Sample demonstration users
- Sample data to run the ILM process
- Process group template library and Project template library
- Maturity list of values for discipline specifications and process groups (that are needed for the generic gate release workflow)
- Sample data for panel asset rendering

Prerequisites to import sample data

> Note:
>
> You must load this sample data in a test environment only for reference purposes. The sample data script sets the importing environment as a test environment, and this action cannot be reverted.

Some of the sample workflows require an access control list (ACL) to run. Create a new ACL with the following properties:

- **Name**: **IPLM EPM Open**
- **Accessor**: **Responsible Party**
- **Access**: **Read**, **Write**, and **Change Ownership**

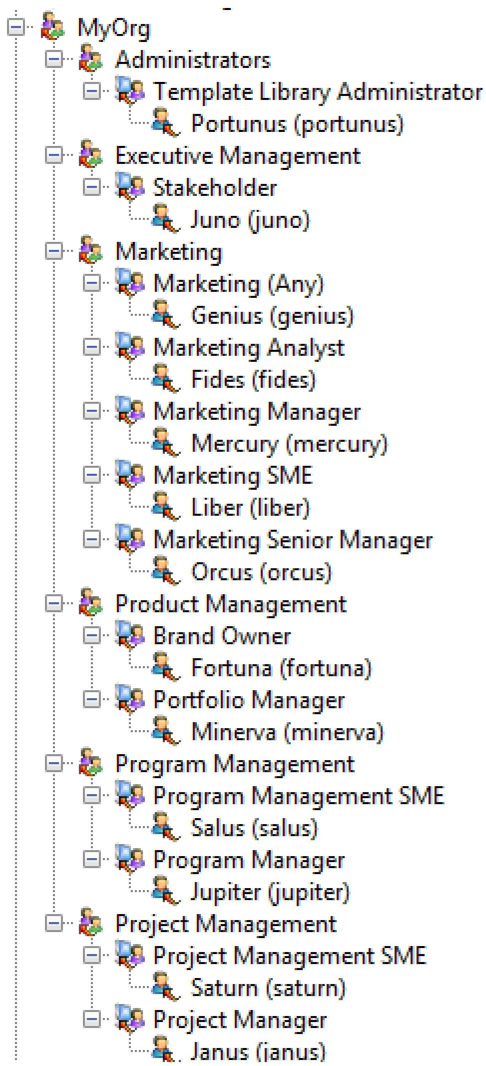
Update a Teamcenter preference

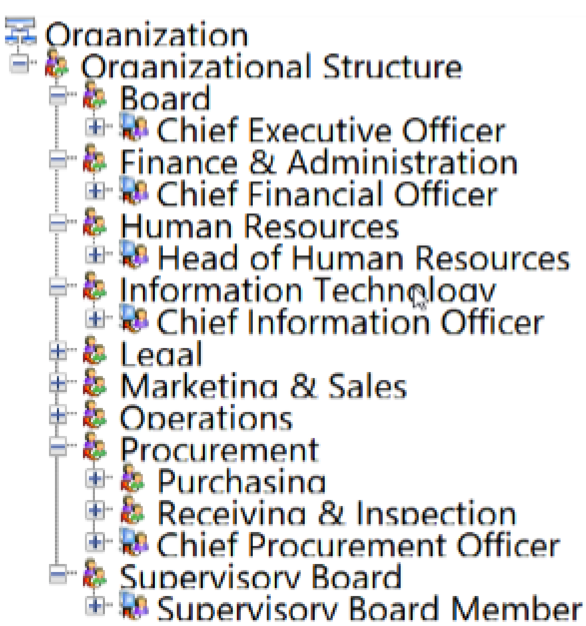
Before importing the sample data, you must set the **TIE_Volume_Map** preference.

1. In the Rich Client, choose **Edit** - **Options**.
2. Locate the **TIE_Volume_Map** preference.
3. Set the preference value to **volume, <volume_Customer>**, where **volume** is your Tc volume name.

Sample organization data

The sample implementation layer imports Teamcenter Organization data automatically. The sample organization includes groups and roles.


MyOrg
Administrators
Template Library Administrator
Portunus (portunus)
Executive Management
Stakeholder
Juno (juno)
Marketing
Marketing (Any)
Genius (genius)
Marketing Analyst
Fides (fides)
Marketing Manager
Mercury (mercury)
Marketing SME
Liber (liber)
Marketing Senior Manager
Orcus (orcus)
Product Management
Brand Owner
Fortuna (fortuna)
Portfolio Manager
Minerva (minerva)
Program Management
Program Management SME
Salus (salus)
Program Manager
Jupiter (jupiter)
Project Management
Project Management SME
Saturn (saturn)
Project Manager
Janus (janus)


Organization
Organizational Structure
Board
Chief Executive Officer
Finance & Administration
Chief Financial Officer
Human Resources
Head of Human Resources
Information Technology
Chief Information Officer
Legal
Marketing & Sales
Operations
Procurement
Purchasing
Receiving & Inspection
Chief Procurement Officer
Supervisory Board
Supervisory Board Member

Import the sample data

1. Extract the*TC_DATA/Ilmsamples/ilm_samples.zip* to any folder.

2. Open the *<extracted folder>/samples/install_ilmsamples.pl* file, and update lines 4 and 5 with the Teamcenter user and password.

3. Open a Teamcenter command prompt and go to the *<extracted folder>/samples* directory.

4. Enter the following command:

   perl install_iplmsamples.pl

5. Confirm the conversion of the current site to a test environment.

Validate the imported sample data

To validate that the sample demonstration users are available:

1. Log on to Active Workspace with the following account:

   Username: Janus

   Password: Janus

2. If you are able to log on successfully, this means that the demonstration users are available.

To validate that the sample data for ILM process is available:

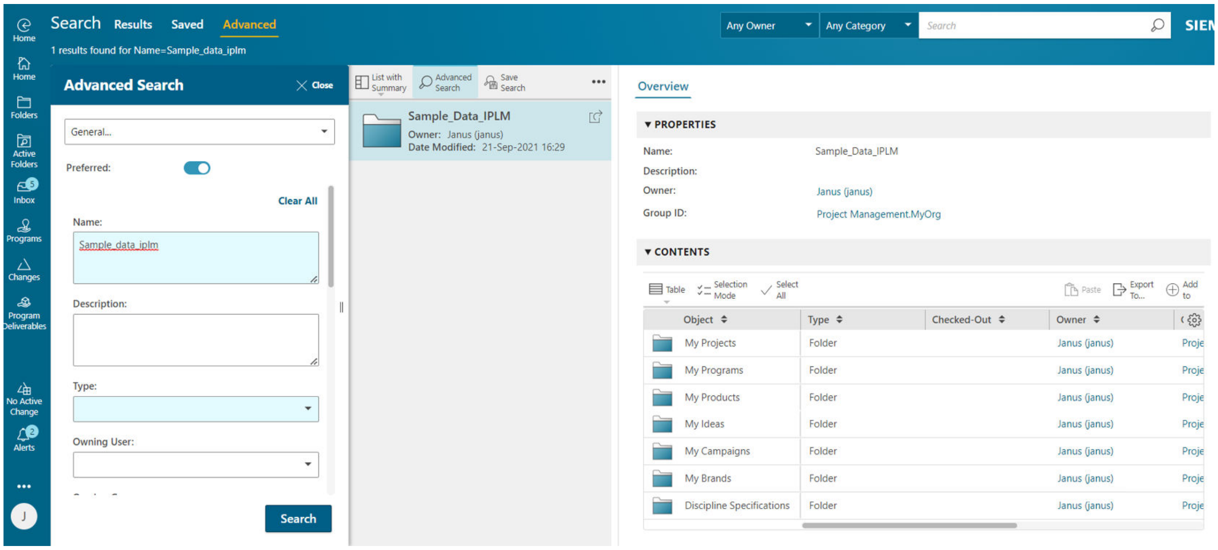
1. Click **Search** > **Advanced Search**.

2. In the **Advanced Search** pane, select **General**.

3. Click **Clear all**. This clears all the fields.

4. In the **Name** box, type **Sample_Data_IPLM**.

5. Click **Search**.

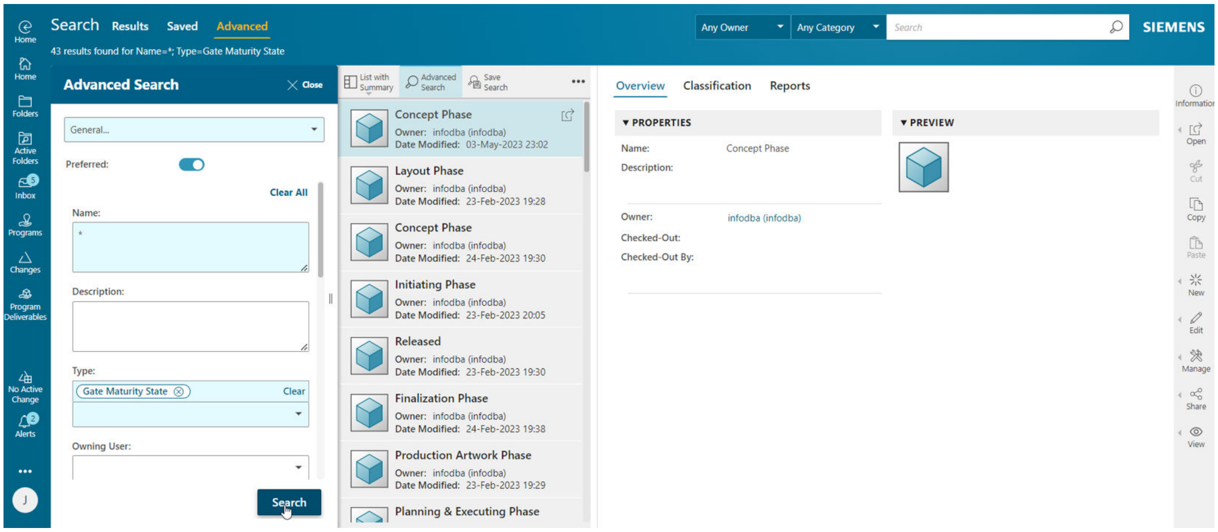


The *Sample_Data _IPLM* file is displayed.

This validates that the ILM sample data is successfully imported.

To validate that the maturity list of values are available:

1. Click **Search** > **Advanced Search**.
2. In the **Advanced Search** pane, select **General**.
3. Click **Clear all**. This clears all the fields.
4. In the **Name** box, type *.
5. In the **Type** box, select **Gate Maturity State**.
6. Click **Search**.

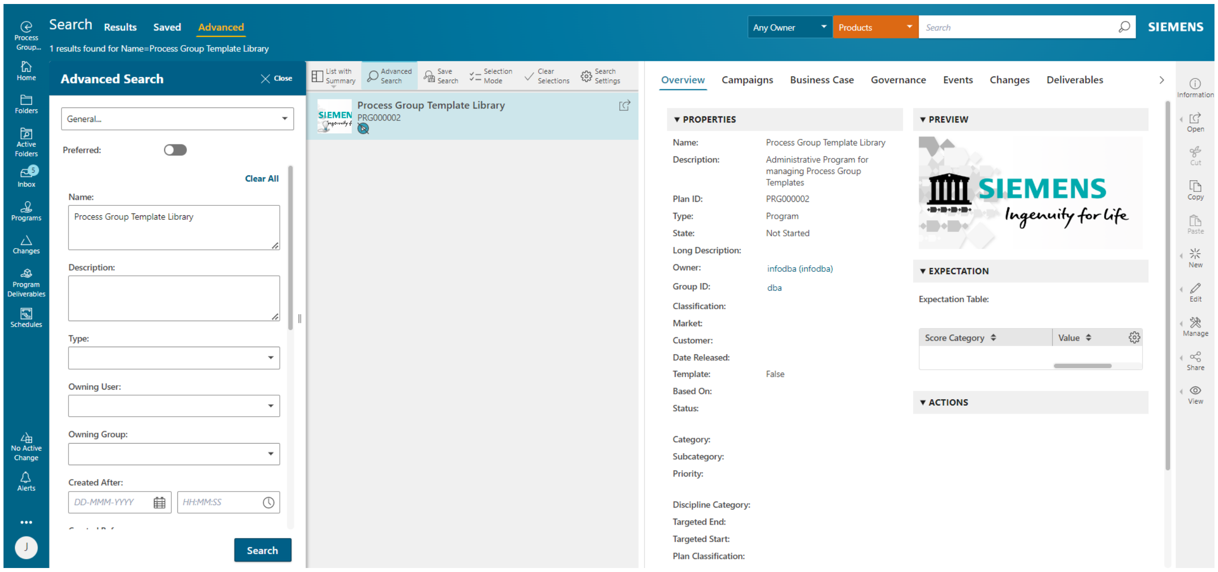


A list of gate maturity states is displayed.

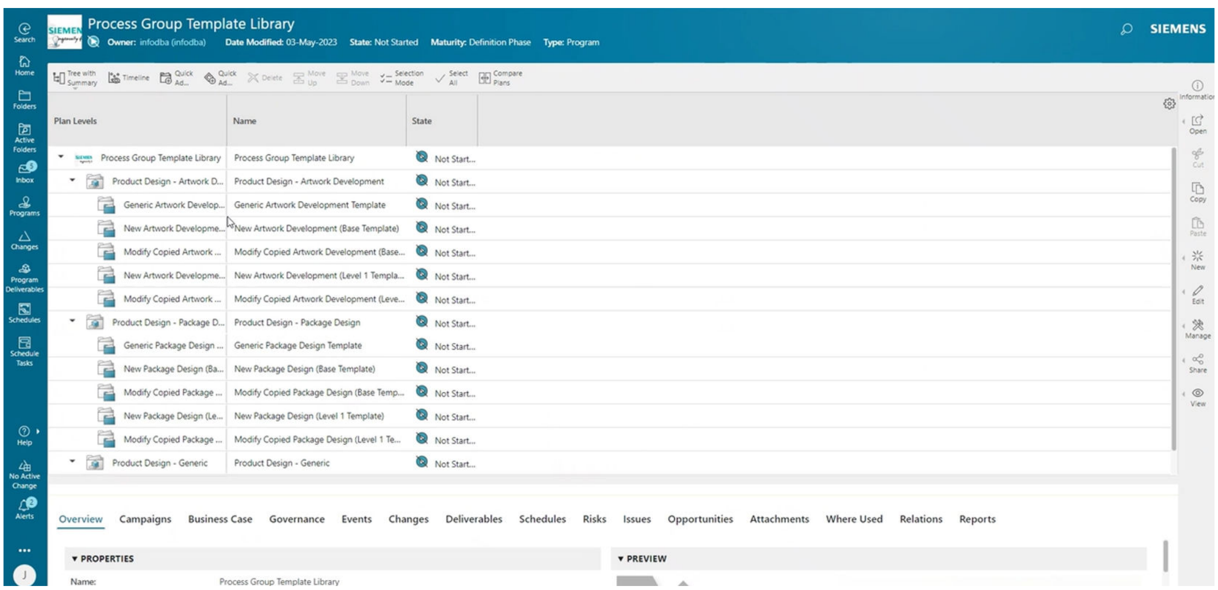
This validates that the maturity list of values is successfully imported.

To validate that the Process Group Template Library and the Project Template Library is available:

1. Click **Search** > **Advanced Search**.
2. In the **Advanced Search** pane, select **General**.
3. Click **Clear all**. This clears all the fields.
4. In the **Name** box, type **Process Group Template Library**.
5. Click **Search**.



6. Open the *Process Group Template Library*.



The Process Group Template Library is displayed.

This validates that the Process Group Template Library is successfully imported.

Similarly, you can validate that the Project Template Library is successfully imported.

To validate that the sample data for panel asset rendering is successfully imported:

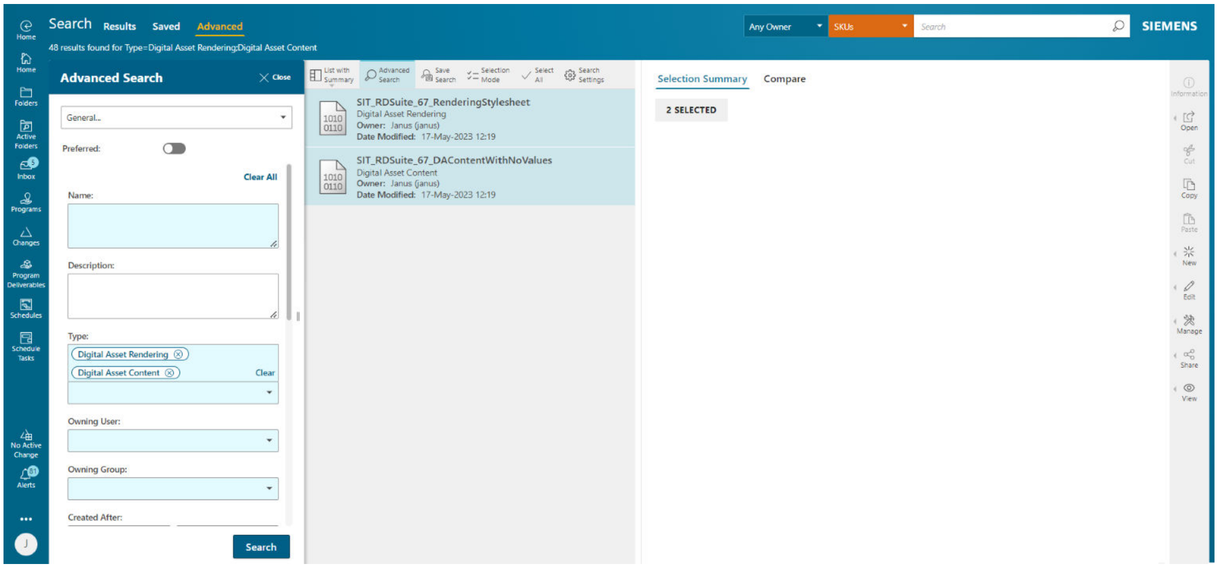
1. Click **Search** > **Advanced Search**.

2. In the **Advanced Search** pane, select **General**.

3. Click **Clear all**. This clears all the fields.

4. In the **Type** box, select **Digital Asset Rendering** and **Digital Asset Content**.

5. Click **Search**.



SIT_RDSuite_67_RenderingStylesheet is an XSLT file.

SIT_RDSuite_67_DAContentWithNoValues is an XML file.

This validates that the sample data for panel asset rendering is successfully imported.

3. Using the ILM - CPG Reference Implementation

Author requirement specifications

Using Requirements Management, you can implement mechanisms that assemble campaign briefs, marketing briefs, and other requirements into the project's development brief automatically. In addition, you can track requirements by implementing traceability relations.

You create a campaign brief as follows:

1. Open the campaign.

2. Click the **Campaign Briefs** tab and click **Add to** ⊕ from the work area toolbar in the **CAMPAIGN BRIEFS** section.

3. In the **Add** panel, enter a name, fill in any of the remaining optional properties, and then click **Add**.

   A campaign brief is created, and gets related to the campaign, and listed in the **CAMPAIGN BRIEFS** table.

4. Open the campaign brief to fill in the requirement details and associate files.

A marketing brief is used to capture inbound requirements from the field, customers, and merchandisers as well as outbound requirements such as claims, certifications, and messaging.

Create a marketing brief as follows:

1. Open an idea.

2. Click the **Marketing Briefs** tab and click **Add to** ⊕ from the work area toolbar in the **MARKETING BRIEFS** section.

3. In the **Add** panel, enter a name, fill in any of the remaining optional properties, and then click **Add**.

   A marketing brief is created and related to the idea, and is listed in the **MARKETING BRIEFS** table.

4. Open the marketing brief to fill in the requirement details and associate files.

Designate a plan template for process groups

As an administrator, you set values for a process group's **Discipline** and **Origination**. These values are used by the system to filter the options that appear in the list of process group templates when a user creates a plan request for a deliverable.

You designate a plan template for a process group as follows:

1. Open the process group and click the **Overview** tab.
2. Click **More commands** ••• > **Edit** > **Start Edit**.
3. Select the **Template** check box.
4. In the **SUB PROJECT PROPERTIES** section, choose a value from the list for the **Discipline** and **Origination**.
5. Click **More commands** ••• > **Edit** > **Save Edits**.

Best practice workflows

Introduction to best practice workflows

The ILM - CPG Reference Implementation provides best practice workflows for managing the lifecycle of objects with gate release processes, managing the creation of copy assets, and for reviewing artwork designs and digital assets.

Workflows are available for the following processes:

- **Generic gate release workflow process**

  The Generic gate release workflow controls how objects advance from one phase to another, based on their maturity. The generic gate release workflow process enables you to send discipline specification objects such as artwork and package items through their life cycles. This workflow gives you more control over different aspects of the workflow. For example, you can choose the SMEs and additional reviewers for each event. You can also specify the phase to which the discipline specification and the related subproject moves to after the event is complete.

- **Phase gate workflow process**

  Control of the information funnel is achieved using a gate release workflow for objects. The Phase gate workflow process controls how objects advance from one phase to another, based on their maturity. Assuming most organizations process more requests than they have the capacity to realize, every phase ends with a formal gate release procedure to ensure that only the requests with the highest potential advance through the funnel.

You can submit the brand equity, campaign, idea, program, project, SKU, and discipline specification objects such as artwork, package item, and formula material through the Phase gate workflow process.

- **Promote/Demote Terminate workflow process**

  The Promote/Demote Terminate workflow process moves an object through its life cycle based on its status.

- **Artwork Brief Collaboration workflow process**

  The Artwork Brief collaboration workflow process makes collaboration possible between various departments such as Product Management, Marketing, Claims, Translation Office, and Artwork.

  In the Artwork brief collaboration workflow process, an artwork brief is created by a product manager, and is then worked on by a marketing SME, legal SME, or technical SME as applicable. The copy assets are created by the SMEs and then reviewed by the claim clearance expert and the regulatory claims expert. After that, they are reviewed by the respective department manager. Upon approval, they are translated by the translation officer. The translated documents are reviewed by the claim clearance expert and the regulatory claims expert, and then the documents are reviewed again by the respective department manager. Lastly, the artwork manager reviews and approves the copy assets.

- **Artwork Design workflow process**

  Artwork design creators can send an artwork design for review to the artwork manager through the Artwork design workflow process.

- **Digital asset workflow process**

  The Digital asset workflow process is a process through which creators of digital assets can send the assets for review to the claim clearance expert and then to the regulatory claim expert for review. After an asset is approved by the Claims department, it is then sent to the artwork manager for final approval.

Working with workflows

When a user submits an object to a workflow, as per the assigned role and the selected object, only specific workflows are available to the user. These workflows are available in the **Template** field. When a user sends an object through a workflow, all the users assigned a particular role receive the notification or task as per the process. For example, when a workflow is triggered and the assignee is a program manager role, the task is routed to all users that are assigned the program manager role. The concerned program manager user can claim the task and work on it.

This is applicable for all objects. The workflow is displayed in the **Workflow** tab so you can quickly see what stage it is at.

> Note:
>
> To use these workflow processes, the solution administrator must ensure that users are assigned the roles involved in the workflow process.

Generic gate release workflow process

The Generic gate release workflow process allows you to send discipline specification objects, such as artwork and package items, through their life cycles. The **Maturity** property identifies what phase an object is in. For example, at the time of creation, an idea is in the first phase, **Capture**. As the idea progresses through the process, its maturity is automatically updated from **Capture** to **Discovery**, and then it is finally updated to **Realization**.

The Generic gate release workflow gives you more control over different aspects of the process. For example, you can choose the SMEs and additional reviewers for each event. You can also specify the phase to which the discipline specification and the related subproject moves to after the event is complete.

The Generic gate release workflow process is available for the following objects:

- **Discipline specification - Artwork**
- **Discipline specification - Package Item**

A user in a junior or senior role associated with an object can submit the discipline specification object to the generic gate release workflow. For example, in case of an artwork discipline specification, a user in an artwork development leader role or an artwork development senior manager role can submit the artwork to the generic gate release workflow.

To submit a discipline specification to the Generic gate release workflow, navigate to the subproject and in the **Deliverables** tab, select the discipline specification and choose **Manage→Submit to Workflow**.

The Generic gate release workflow process supports branching into different processes, depending on fast track status and conditional release.

The following list describes aspects of the Generic gate release workflow process in more detail:

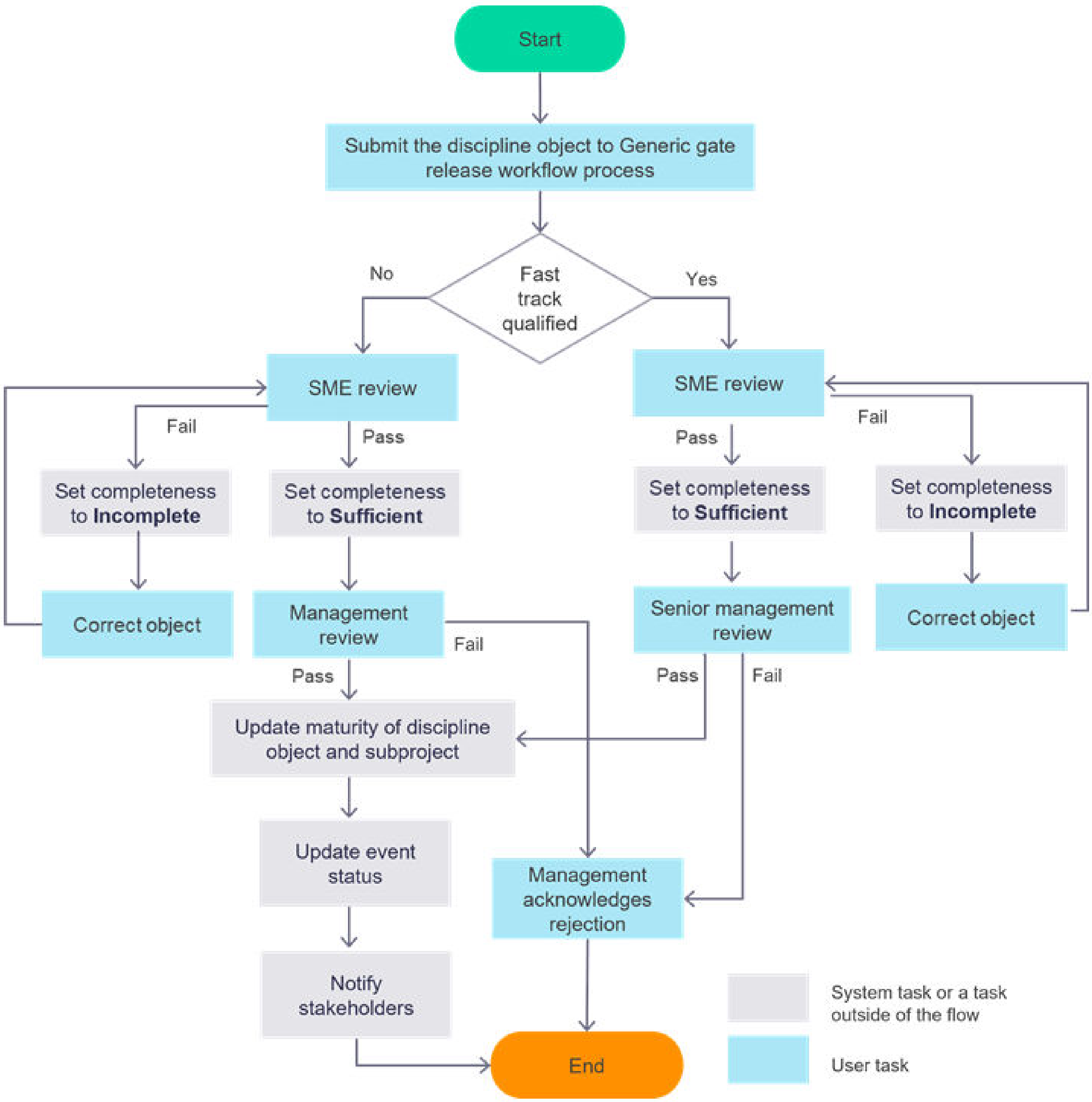
- **Fast track status**

  In many cases, your organization might want specific ideas to receive additional attention and be processed faster, based on their importance. For such items, the number of consistency checks during the gate release workflow is reduced, minimizing the amount of data that is considered relevant for completing the phase. During the review for release in the gate release workflows, the reviewer roles are exchanged, with more senior reviewers involved. To prevent time-consuming iterations, the subject matter expert cannot reject the business object. Instead, action items are captured to implement adjustments either in parallel or soon after the management review.

Either before or during gate release, an object can be identified as **Fast track qualified** during the capture and discovery phases. Objects that qualify for fast track automatically receive elevated attention by senior management during reviews and go through fewer consistency checks. In this way, the fast track qualification reduces coordination efforts and avoids delays that slow down the gate process.

- **Conditional release**

  Gates can be passed with open action items, granting a *Conditional Release* status and avoiding delays from having to shift or reject a gate. Once all action items are closed, the status is updated accordingly, and the stakeholders receive notifications.



Prerequisites for the Generic gate release workflow process

- The discipline specification to be submitted to the Generic gate release workflow must be in a subproject under a project in a program.

- **Event configuration**

For each event, you can configure the workflow by specifying the relevant information in the **Gate Configuration** tab. To view the **Gate Configuration** tab, you must set the **Approval Gate** property of the event to **True**. In the **Gate Configuration** tab, you can specify the subject matter expert, additional reviewers, and phase movement details for subprojects and discipline specifications:

- **Subject matter expert**

  To choose a subject matter expert, in the **SUBJECT MATTER EXPERT** section, select a role from the **Subject Matter Expert** list. This assigns the workflow task to the user with the selected role.

  > Note:
  >
  > When you assign a role, ensure that the relevant object is related to the discipline specification. For example, if you assign a brand owner as the subject matter expert, but no brand is associated with the discipline specification, the SME review task cannot be assigned to the relevant user.

- **Additional reviewers**

  You can add additional reviewers for each type of review such as the subject matter review or the management reviews.

  In the **RESOURCE ASSIGNMENT** section, click **Add Assignment**. In the **Resource Assignment** panel, in the **Gate Assignment Type** list, specify the type of reviewer you wish to add, such as **Subject Matter Expert**, and click **Add**. Select the newly created row and click **Assign Responsible User**. In the **Assign Responsible User** panel, search for a user and click **Assign**.

- **Phase to which the related subproject moves upon completion of the event**

  Upon completion of the event, the phase of the related subproject is set to the value you choose.

  In the **INCREMENT STATUS PLAN** section, select the phase to which the related subproject moves when the event is completed. In case the desired maturity value is not listed, you can create a new maturity value by clicking **Add Status Plan**. In the **Add Status Plan** panel, specify the name and click **Add**.

- **Phase to which the discipline specification moves upon completion of the event**

  Upon completion of the event, the phase of the discipline specification is set to the value you choose.

  In the **INCREMENT STATUS TARGET** section, select the phase to which the discipline specification moves when the event is completed.

  In case the desired maturity value is not listed, you can create a new maturity value by clicking **Add Status Target**. In the **Add Status Target** panel, specify the name and click **Add**.

Note:

Any sections not completed in the **Gate Configuration** tab are skipped in the workflow. For example, if you do not specify a subject matter expert, the workflow skips the subject matter review and moves to the next step.

Phase gate release workflow process

Control of the information funnel is achieved using a gate release workflow for objects. The Phase gate release workflow process controls how objects advance from one phase to another, based on their **Maturity**. Assuming most organizations process more requests than they have the capacity to realize, every phase ends with a formal gate release procedure to ensure that only the requests with the highest potential advance through the funnel.

The **Maturity** property identifies what phase an object is in. For example, at the time of creation, an idea is in the first phase, *Capture*. As the idea progresses through the process, its maturity is automatically updated from *Capture* to *Discovery*, and then it is finally updated to *Realization*.

A phase gate release workflow is always specific to a phase and involves subject matter experts and reviewers as applicable. The phase gate workflow template implementation supports branching into different processes depending on fast track status, consistency check features, and conditional release.

The following list describes aspects of the Phase gate release workflow process in more detail:

- **Fast track status**

  In many cases, your organization might want specific ideas to receive additional attention and be processed faster, based on their importance. For such items, the number of consistency checks during the gate release workflow is reduced, minimizing the amount of data that is considered relevant for completing the phase. During the review for release in the gate release workflows, the reviewer roles are exchanged, with more senior reviewers involved. To prevent time-consuming iterations, the subject matter expert cannot reject the business object. Instead, action items are captured to implement adjustments either in parallel or soon after the management review.

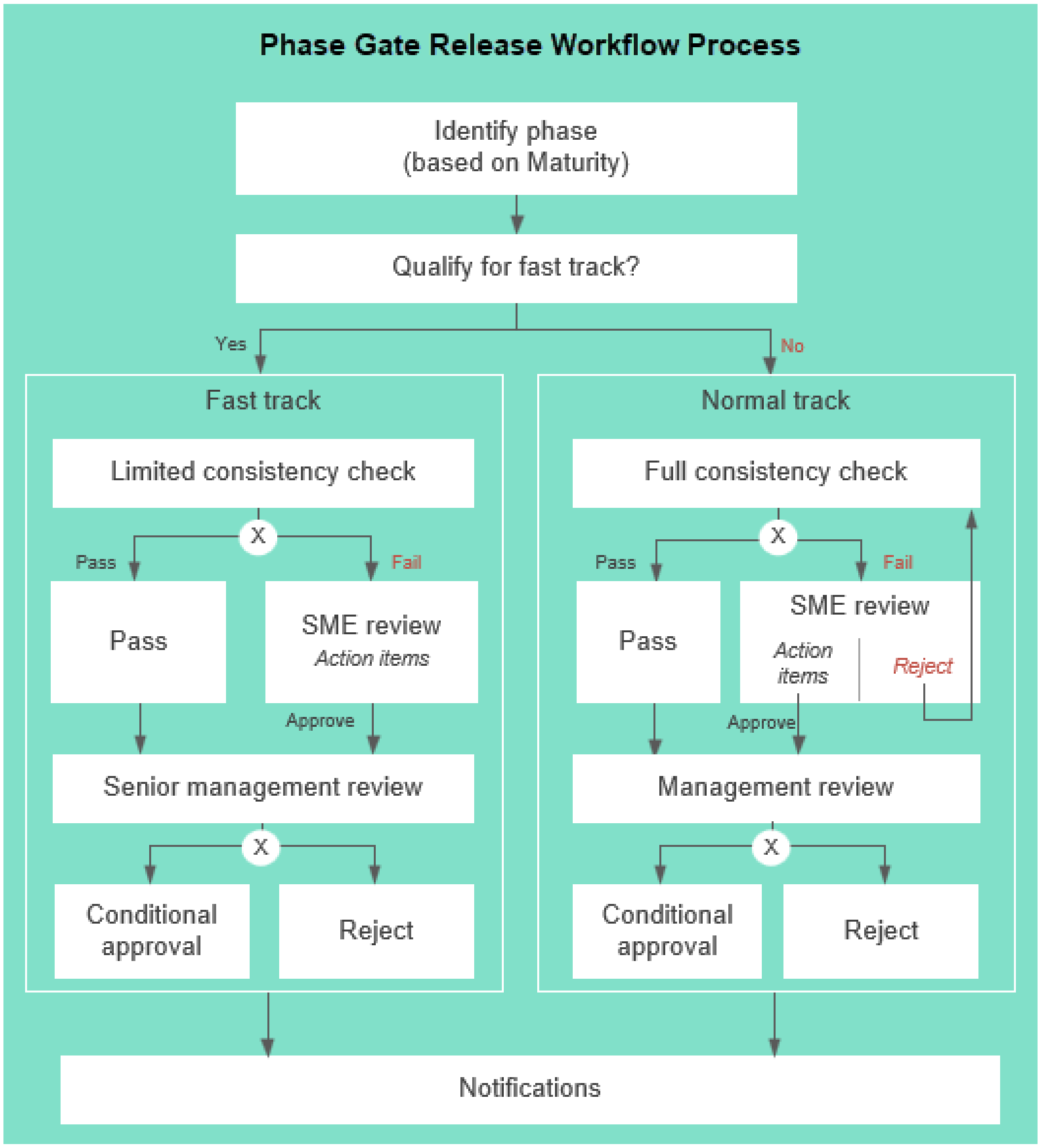
  Either before or during gate release, an object can be identified as **Fast track qualified** during the capture and discovery phases. Objects that qualify for fast track automatically receive elevated attention by senior management during reviews and go through fewer consistency checks. In this way, the fast tract status reduces coordination efforts and avoids delays that slow down the gate process.

- **Consistency checks for completeness**

  Consistency checks increase data quality by verifying the data entry for completeness at the end of a phase in order to avoid using forms that use mandatory entry fields. Subject matter experts are alerted to missing information and can record relevant action items or determine that the information is sufficient. This practice provides flexibility for passing gates.

- **Conditional release**

  Gates can be passed with open action items, granting a *Conditional Release* status and avoiding delays from having to shift or reject a gate. Once all action items are closed, the status is updated accordingly, and the stakeholders receive notifications.



> Note:
>
> To use this process for each of the following objects, the solution administrator must ensure that users are assigned the roles involved in the workflow process.

A user in a junior or senior role associated with an object can submit the object to the phase gate release workflow process. For example, in case of a brand equity, a brand manager or a senior manager can submit a brand equity to the phase gate release workflow.

Phase gate workflow process is available for the following objects:

- **Brand equity**
- **Campaign**
- **Idea**
- **Program**
- **Project**
- **SKU**
- **Discipline specification - Artwork**
- **Discipline specification - Package Item**
- **Discipline specification - Formula Material**

Promote/Demote Terminate workflow process

The Promote/Demote Terminate workflow process is available for senior management roles to promote, demote, or end a workflow process for the following objects as they progress through their life cycles. This process moves an object through its life cycle based on its status.

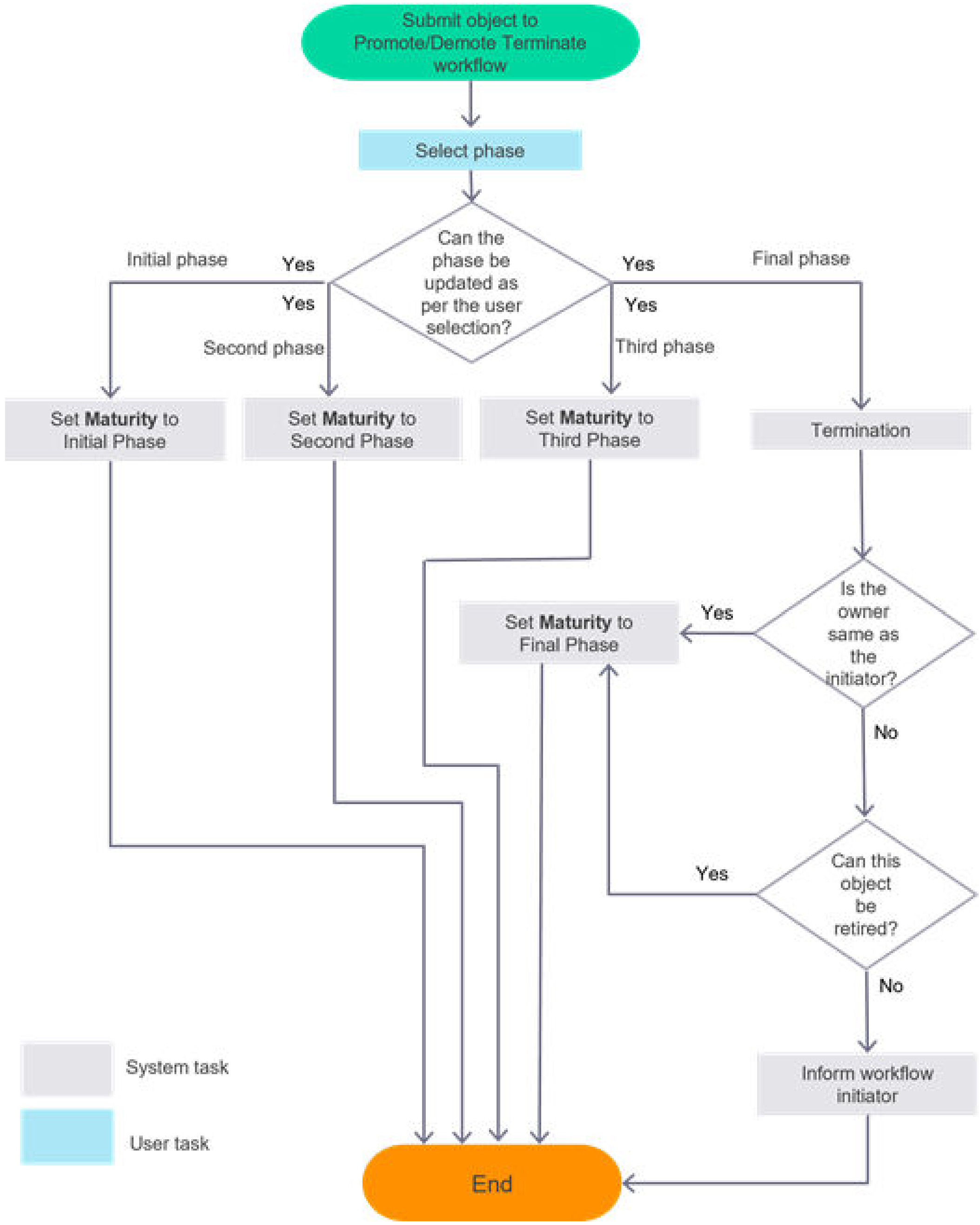
- **Brand equity**
- **Campaign**
- **Idea**
- **Program**
- **Project**
- **SKU**
- **Discipline specification - Artwork**
- **Discipline specification - Package Item**
- **Discipline specification - Formula Material**

Note:

When an object is being retired or suspended, the object owner, if different from the person submitting the object, participates in a review task to decide if the object should be retired or suspended.

Note:

To use this process for each of the objects mentioned, the solution administrator must ensure that users are assigned the roles involved in the workflow process.



Artwork brief collaboration workflow process

In the Artwork brief collaboration workflow process, the product manager sends an artwork brief revision to the respective subject matter expert (SME). Based on the type of the brief, it is sent to the respective SME for review. There are three types of briefs:

- Marketing brief — sent to the marketing SME for review
- Legal brief — sent to the legal SME for review

- Technical brief — sent to a technical SME for review

A master copy asset revision is automatically created and the SME creates a copy asset and attaches it to the master copy asset revision. This copy asset revision is sent to the claim clearance expert and then to the regulatory claim expert. The regulatory claim expert sends the copy asset revision to the marketing manager.

After the regulatory claim expert and the marketing manager approve it, the **Release Status** of the master copy asset revision is set to **Approved**, and a local copy asset revision is created. After this, the local copy asset revision is sent to the translator officer. Then, the translated documents are sent to the claim clearance expert and the regulatory claim expert. After this, they are sent to the marketing manager for review.

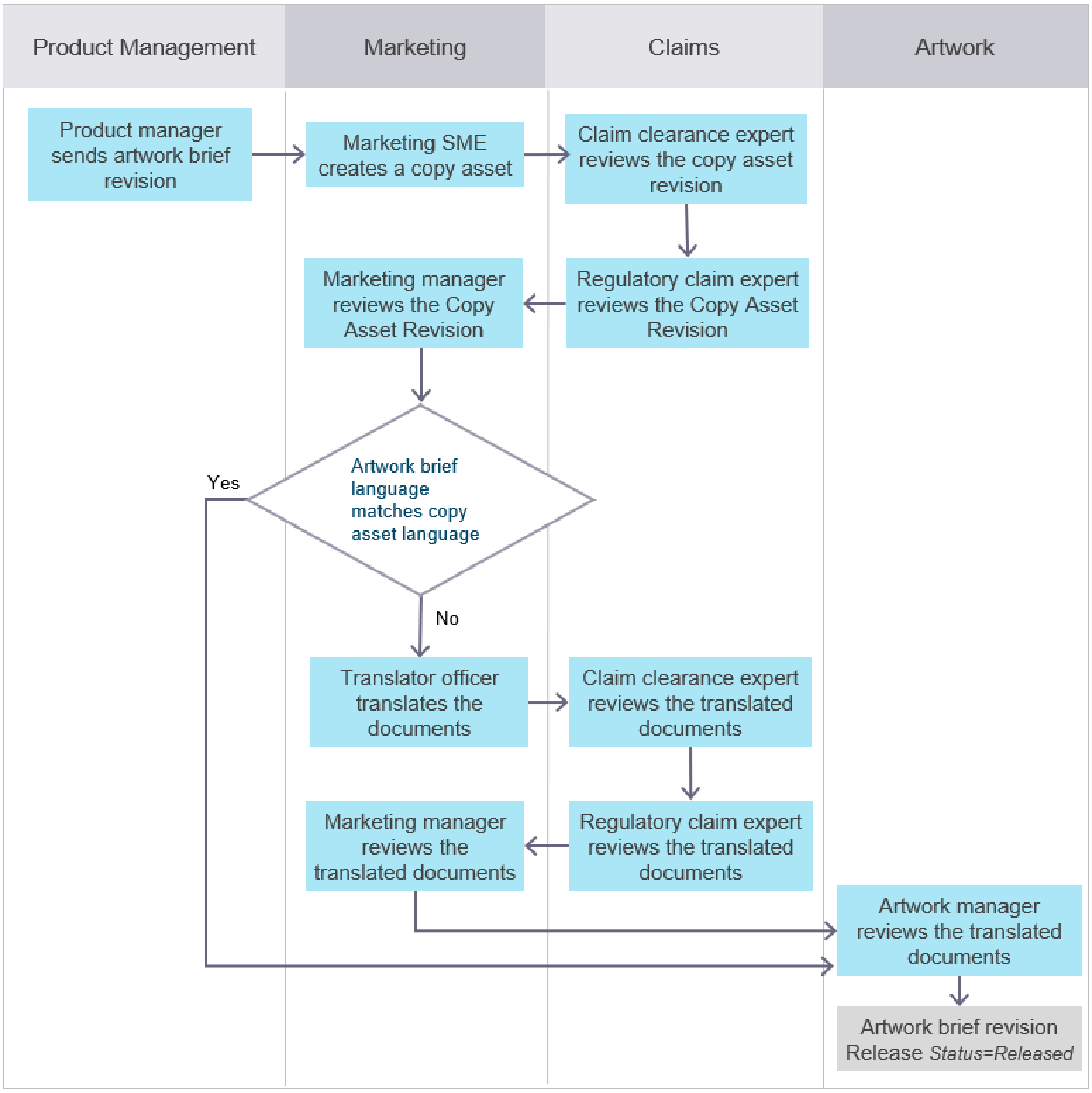
Upon approval, the **Release Status** of the local copy asset revision is set to **Released**. The artwork brief revision is then sent to the artwork manager. On approval by the artwork manager, the **Release Status** of the artwork brief revision is set to **Released**.

The process shown here is followed provided the following values are set:

- **Claim Clearance Required**: **True**
- **Regulatory Claim Required**: **True**

> Note:
>
> You can select either or both these options based on whether you wish to include either or both the claim clearance expert and the regulatory claim expert in the review process.

The following workflow shows the process that takes place when the language in the artwork brief does not match that of the copy asset. In this scenario, the translator officer translates the documents. If the language of the artwork brief and the copy asset match, the marketing manager sends the copy asset revision directly to the artwork manager for review.



To use this process, the solution administrator must ensure that users are assigned to these roles.

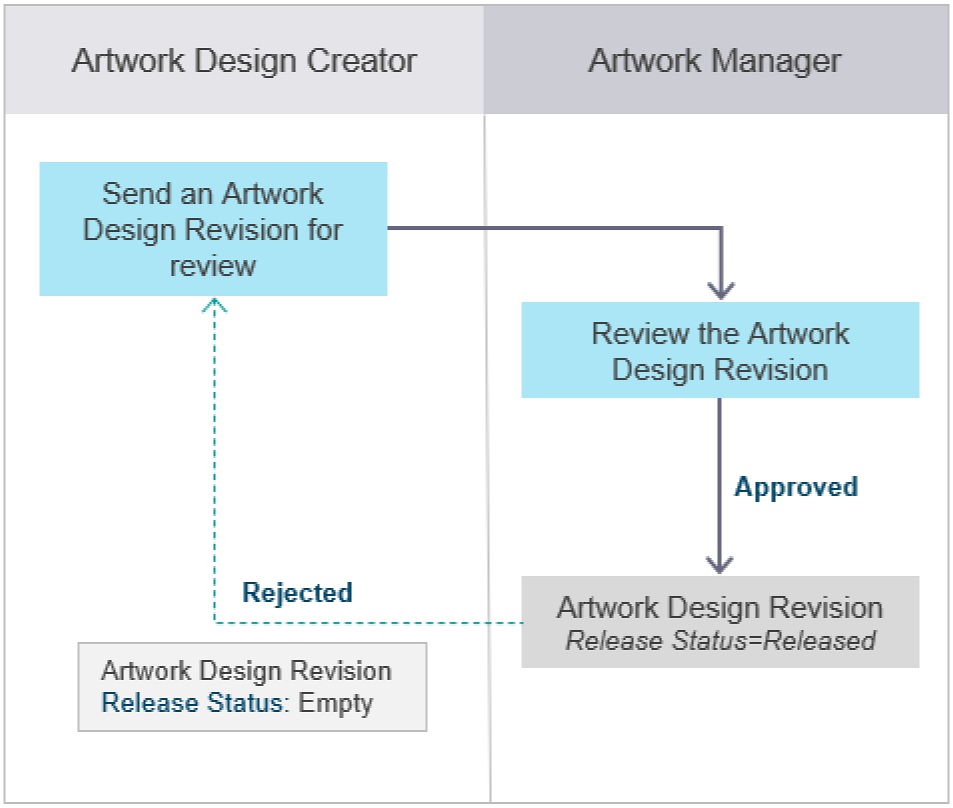
Role	Group	Responsibility	OOTB user provided
Product Manager	Product Management.Marketing & Sales.Organizational Structure	Submits the artwork brief to the Artwork brief collaboration workflow process	Coeus
Marketing SME	Marketing & Sales.Organizational Structure	Creates the marketing artwork brief	Liber

Role	Group	Responsibility	OOTB user provided
Marketing Manager	Marketing & Sales.Organizational Structure	Reviews the marketing artwork brief	Mercury
Legal Subject Matter Expert	Legal.Organizational Structure	Creates the legal artwork brief	Aeacus
Legal Manager	Legal.Organizational Structure	Reviews the legal artwork brief	Rhadamanthus
Formulation Dev SME	Formulation Development.Research & Development.Operations.Organizational Structure	Creates or reviews the formulation artwork brief	Daedalus
Formulation Dev Manager	Formulation Development.Research & Development.Operations.Organizational Structure	Reviews the artwork brief	Venus
Claim Compliance SME	Legal.Organizational Structure	Checks claim compliance	Clio
Regulatory Compliance SME	Legal.Organizational Structure	Checks regulatory compliance	Rhea
Translator	Translation Office.Marketing & Sales.Organizational Structure	Translates the documents	Theseus
Artwork Development Manager	Artwork Development.Research & Development.Operations.Organizational Structure	Reviews the artwork brief	Apollo

Artwork design workflow process

An artwork design creator can send an artwork design revision for review through the Artwork design workflow process. An artwork manager reviews the design. Then, upon approval, the **Release Status** of the artwork design revision is updated to **Released**. If the artwork manager rejects the design, a notification is sent to the artwork design creator and the **Release Status** remains **Empty**. The artwork design creator can upidate the design and send it for review again through this process.

> Note:
>
> An artwork design can be created and submitted to the Artwork design workflow process by any user.



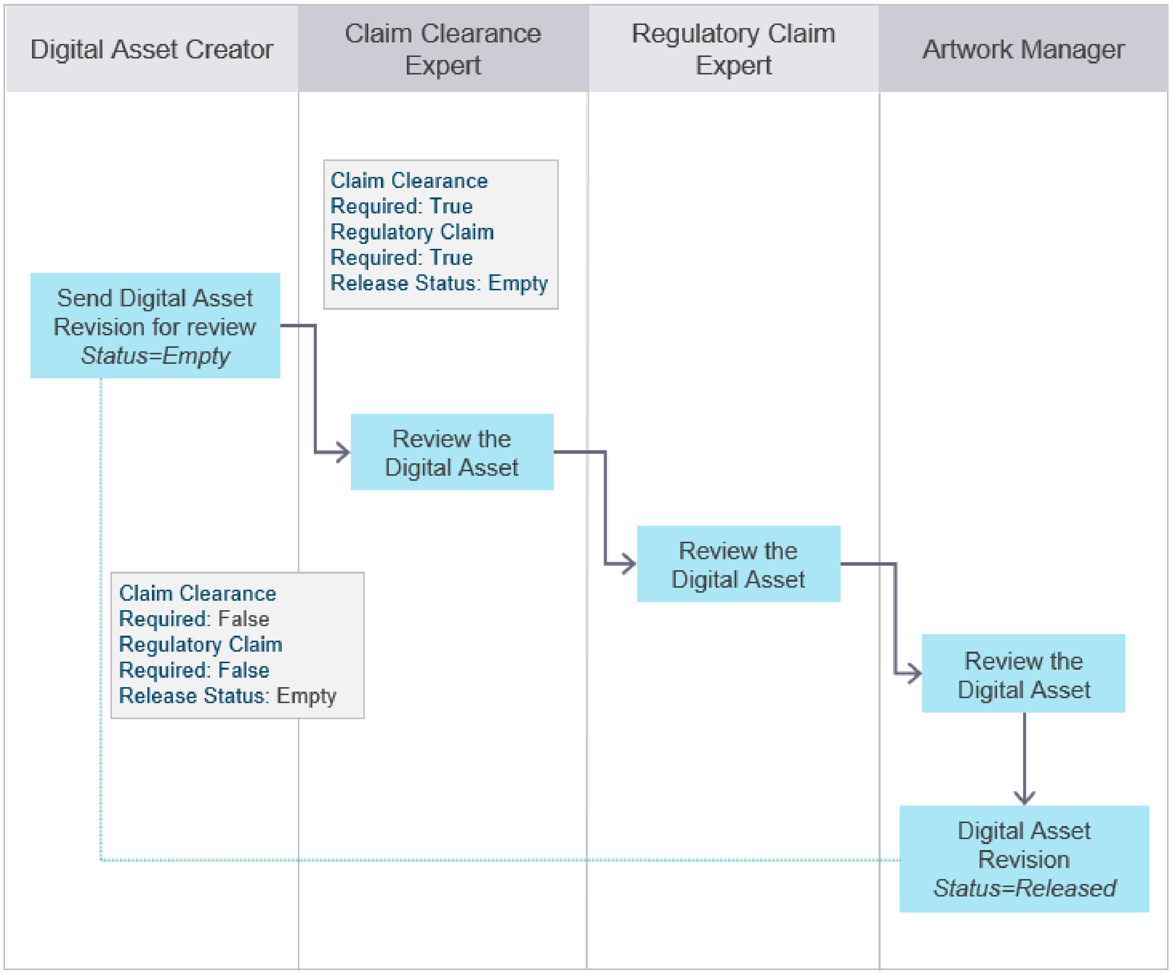
Role	Group	Responsibility	OOTB user provided
Artwork Development SME	Artwork Development.Research & Development.Operations.Organizational Structure	Reviews if the workflow is failing the consistency check	Persephone
Leader Artwork Development	Artwork Development.Research & Development.Operations.Organizational Structure	Receives notifications from the Gate release workflow process Submits artwork to the Promote/Demote/Terminate workflow process	Larisa
Artwork Development Manager	Artwork Development.Research & Development.Operations.Organizational Structure	Reviews the artwork brief	Apollo

Digital asset workflow process

Creators of digital assets can use the Digital asset workflow process to send the assets for review to the claim clearance expert and the regulatory claim expert for review. After an asset is approved by the Claims department, it is then sent to the artwork manager for final approval.

You can select either or both of these options based on the experts you wish to include in the review process:

- **Claim Clearance Required**: **True**
- **Regulatory Claim Required**: **True**



To use this process, the solution administrator must ensure that users are assigned to these roles:

Role	Group	Responsibility	OOTB user provided
Artwork Development SME	Artwork Development.Research & Development.Operations.Organizational Structure	Reviews if workflow is failing the consistency check	Persephone
Leader Artwork Development	Artwork Development.Research & Development.Operations.Organizational Structure	Receives notifications from Gate release workflow process	Larisa

Role	Group	Responsibility	OOTB user provided
		Submits artwork to the Promote/Demote/ Terminate workflow process	
Artwork Development Manager	Artwork Development.Research & Development.Operations.Organizational Structure	Reviews the artwork brief	Apollo
Claim Compliance SME	Legal.Organizational Structure	Checks claim compliance	Clio
Regulatory Compliance SME	Legal.Organizational Structure	Checks for regulatory compliance	Rhea

Note:

Any user role can submit artwork to the Digital asset workflow process.

Life cycles

Life cycle of a brand equity

A brand equity revision moves through various stages of maturity as it progresses through its life cycle. When a brand equity is created, it is in the **Development** stage. The life cycle of a brand equity has the following stages:

The Product Management and Marketing and Sales organizations handle brand equities. A brand equity revision can be promoted to the next maturity status by any of the following roles:

- Brand manager
- Senior brand manager
- Portfolio manager
- Senior portfolio manager

Only the senior roles, that is, the senior brand manager and the senior portfolio manager, can demote or retire a brand equity.

User roles needed to work with brand equity workflows:

Role (OOTB user provided)	Organization	Task	Workflow
Brand Manager (Fortuna) Portfolio Manager (Minerva)	Product Management.Marketing & Sales.Organizational Structure	Promotes the brand equity to the next Maturity Status	Brand Equity Gate release workflow process
Senior Brand Manager (Ceres) Senior Portfolio Manager (Sol)	Product Management.Marketing & Sales.Organizational Structure	Promotes, demotes, or terminates a brand equity	Brand Equity Promote/ Demote/Terminate workflow process

> Note:
>
> The roles mentioned in this table are required to work with brand equity workflows. Administrators must ensure that these roles are assigned to users. If a role has no user assigned to it in a workflow, the workflow cannot be completed.

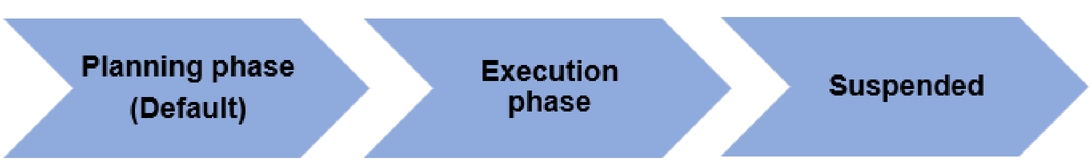
Life cycle of a campaign

Campaign objects follow a simplified product life cycle with these phases:

- Planning phase
- Execution phase

During the **Planning** phase, goals, targeting messages, and key messages are defined, linked to existing intellectual property, and reviewed in the campaign brief. Brands are related to the campaign, and the windows of opportunity identify important periods on the planning timeline that can help identify targets during program planning. During both the **Planning** phase and the **Execution** phase, the campaign can collect ideas and be associated with programs. This association with ideas and programs automatically provides opportunities from their risk register back to the campaign.

Before a campaign is closed and marked as **Suspended**, the gate review should include activities to capture information about whether the campaign results helped achieve the goals identified initially.



User roles needed to work with campaigns:

Role (OOTB User Provided)	Organization	Task	Workflow
Marketing Manager (Mercury)	Marketing & Sales.Organizational Structure	Submits a campaign to the Gate release workflow process to promote the campaign to the next maturity status	Campaign Gate release workflow process
Senior Marketing Manager (Orcus)	Marketing & Sales.Organizational Structure	Promotes, demotes, or suspends the campaign by submitting to the Promote/Demote/Terminate workflow process	Campaign Promote/Demote/ Terminate workflow process
Marketing SME (Liber)	Marketing & Sales.Organizational Structure	Reviews the campaign as an SME	Campaign Gate release workflow process
Chief Marketing Officer (Melete)	Marketing & Sales.Organizational Structure	Reviews the campaign in case of a senior management review	Campaign Gate release workflow process

Life cycle of a program

Programs provide the link between the organization's goals and the individual components such as projects and process groups. A program is implemented in phases, starting with the **Definition** phase where the objectives to be addressed by the program are elaborated and the expected outcomes are defined. During the **Delivery** phase, the program's components are planned, integrated, and coordinated. During the **Closure** phase, all activities necessary to bring the program to a **Closed** status are performed.

User roles needed to work with program workflows:

Role (OOTB User Provided)	Organization	Task	Workflow
Program Manager (Jupiter)	Operations.Organizational Structure	Submits programs to the Gate release workflow process	Program Gate release workflow process
Senior Program Manager (Mars)	Operations.Organizational Structure	Submits programs to the Promote/Demote/Terminate workflow process	Program Promote/ Demote/Terminate workflow process
Chief Operating Officer (Neptune)	Operations.Organizational Structure	Performs the senior management review	Program Gate release workflow process

Life cycle of a project

When a project is created, it is in the **Initiating phase** by default. After this, it moves to the **Planning and Execution phase** for project planning and execution. The project then moves to the **Closing phase** to be formally closed.

User roles needed to work with project workflows:

Role (OOTB User Provided)	Organization	Task	Workflow
Senior Project Manager (Quirinus)	Operations.Organizational Structure	Submits projects to the Promote/Demote/Terminate workflow process	Project Promote/ Demote/Terminate workflow process
Project Manager (Janus)	Operations.Organizational Structure	Submits projects to the Gate release workflow process	Project Gate release workflow process
Chief Operating Officer (Neptune)	Operations.Organizational Structure	Performs the senior management review	Project Gate release workflow process

Life cycle of an idea

The life cycle of an idea is designed to provide justification for the idea's commercialization.

In the **Capture** phase, a marketing manager starts by collecting context information and requirements and by identifying reference products, SKUs, or brands.

After this, in the **Discover** phase, a marketing analyst is assigned to the idea to collect the necessary additional information. This information includes a business case and a market analysis. The marketing analyst also scores the idea to provide guidance to the reviewers. If needed, and if the idea is not already related to a campaign, the marketing analyst can select a campaign and relate the idea to it.

With the next gate release, the idea is accepted for realization, which promotes it to the **Realization** phase and starts the initialization of a new project. Along the ideation funnel, an archived idea can be promoted again in case it is suitable for commercial implementation.

User roles needed to work with idea workflows:

Role (OOTB User Provided)	Organization	Task	Workflow
Marketing Manager (Mercury)	Marketing & Sales.Organizational Structure	Submits an idea to the Gate release workflow process Performs the management review	Idea Gate release workflow process
Marketing Analyst (Liber)	Marketing & Sales.Organizational Structure	Notifies the Analyst	Idea Gate release workflow process
Senior Marketing Manager (Orcus)	Marketing & Sales.Organizational Structure	Submits an idea to the Promote/Demote/Terminate workflow process	Idea Promote/ Demote/Terminate workflow process

Life cycle of a SKU

The life cycle of the SKU is driven by the discipline specifications associated with it. When a SKU is created, it is in the **Development** phase by default. When the discipline specifications associated with a SKU are released, the SKU can also be released and is then moved to the **Released** phase. Each discipline involved is responsible for the release of their discipline specifications, and they can follow an independent approach in managing the processes.

User roles needed to work with the SKU workflows:

Role (OOTB User Provided)	Organization	Task	Workflow
Product Manager (Coeus)	Product Management.Marketing & Sales.Organizational Structure	Submits the SKUs to the Gate release workflow process	SKU Gate release workflow process
Senior Brand Manager (Sol)	Product Management.Marketing & Sales.Organizational Structure	Performs the senior management review	SKU Gate release workflow process
Senior Product Manager (Selene)	Product Management.Marketing & Sales.Organizational Structure	Performs the senior management review Submits a SKU to the Promote/Demote/Terminate workflow process	SKU Gate release workflow process SKU Promote/ Demote/Terminate workflow process

Life cycle of a discipline specification

Discipline specifications are business objects that represent the expected results that should be delivered by the discipline involved, such as a formula material, a package item, and artwork.

User roles needed to work with the formula material workflows:

Role (OOTB User Provided)	**Organization**	**Task**	**Workflow**
Leader Formulation Development (Summanus)	Formulation Development.Research & Development.Operations.Organizational Structure	Receives notifications from the Gate release workflow process Submits formula material to the Promote/Demote/Terminate workflow process	Discipline Specification Gate release workflow process Discipline Specification Promote/Demote/Terminate workflow process
Formulation Dev Senior Mgr (Terminus)	Formulation Development.Research & Development.Operations.Organizational Structure	Participates in senior management reviews Submits formula material to the Promote/Demote/Terminate workflow process	Discipline Specification Gate release workflow process Discipline Specification Promote/Demote/Terminate workflow process
Formulation Dev Manager (Venus)	Formulation Development.Research & Development.Operations.Organizational Structure	Participates in management reviews Submits formula material to the Gate release workflow process	Discipline Specification Gate release workflow process
Formulation Dev SME (Daedalus)	Formulation Development.Research & Development.Operations.Organizational Structure	Reviews in case the consistency check fails	Discipline Specification Gate release workflow process

User roles needed to work with the package item workflows:

Role (OOTB User Provided)	Organization	Task	Workflow
Leader Package Design (Mercury)	Package Design.Research & Development.Operations.Organizational Structure	Receives notifications from the Gate release workflow process Submits package items to the Promote/ Demote/Terminate workflow process	Discipline Specification Gate release workflow process Discipline Specification Promote/Demote/ Terminate workflow process
Package Design Senior Mgr (Liber)	Package Design.Research & Development.Operations.Organizational Structure	Participates in senior management reviews Submits package items to the Promote/ Demote/Terminate workflow process	Discipline Specification Gate release workflow process Discipline Specification Promote/Demote/ Terminate workflow process
Package Design Manager (Melete)	Package Design.Research & Development.Operations.Organizational Structure	Participates in management reviews Submits package items to the Gate release workflow process	Discipline Specification Gate release workflow process
Package Design SME (Orcus)	Package Design.Research & Development.Operations.Organizational Structure	Reviews in case the consistency check fails	Discipline Specification Gate release workflow process

User roles needed to work with the artwork workflows:

Role (OOTB User Provided)	Organization	Task	Workflow
Leader Artwork Development (Larisa)	Artwork Development.Research & Development.Operations.Organizational Structure	Receives notifications from the Gate release workflow process Submits artwork to the Promote/ Demote/Terminate workflow process	Discipline Specification Gate release workflow process Discipline Specification Promote/Demote/

Role (OOTB User Provided)	Organization	Task	Workflow
			Terminate workflow process
Artwork Development Senior Mgr (Athena)	Artwork Development.Research & Development.Operations.Organizational Structure	Participates in senior management reviews Submits artwork to the Promote/Demote/Terminate workflow process	Discipline Specification Gate release workflow process Discipline Specification Promote/Demote/Terminate workflow process
Artwork Development Manager (Apollo)	Artwork Development.Research & Development.Operations.Organizational Structure	Participates in management reviews Submits artwork to the Gate release workflow process	Discipline Specification Gate release workflow process
Artwork Development SME (Persephone)	Artwork Development.Research & Development.Operations.Organizational Structure	Reviews in case the consistency check fails	Discipline Specification Gate release workflow process

Working with best practice workflows

Submit an object to a workflow

To submit an object to a workflow for the purpose of promoting it:

1. Select the object and click **More commands** ••• > **Manage** > **Submit to Workflow**.

2. In the **Submit to Workflow** dialog box, in the **Workflow** tab, select either **Assigned** or **All**.

    - Select **Assigned** to automatically select the applicable template by default. By default, the **Assigned** option is selected.

    - Select **All** to specifically choose a template from all the templates available. In the **Template** list, you can choose the appropriate workflow template to use to promote the object.

Note:

To see the appropriate workflow name as per your user role and user group, ensure that you have selected both the user role and the user group in Active Workspace. The workflow process available to you depends on your role. For example, to promote a brand equity, the Brand Equity Gate release workflow process is available to a brand manager or portfolio manager, whereas the the Brand Equity Promote/Demote/Terminate workflow process is available to the senior brand manager or senior portfolio manager.

3. (Optional) Select **Fast track qualified** to send the object directly to a senior management review so that it is processed quickly.

4. (Optional) In the **Targets** section, you can add more objects as needed.

5. Click **Submit**.

Promote, demote, or retire an object

The objects you can promote, demote, or retire depend on your role. For example, if you are a brand manager or a portfolio manager, you can promote a brand equity to the next stage of maturity. Also, depending on your role, you may only be able to promote objects, but not demote or retire them. Typically, only senior–level roles can demote or retire objects. For example, only a senior brand manager or a senior portfolio manager can demote or retire a brand equity.

To promote, demote, or retire an object:

1. Open your Inbox and click the **Select Phase** task.

2. On the **Overview** tab, in the **Action** section, select the phase you wish to move the object to or choose the option to end the life cycle as needed.

Mark an object as fast-track qualified and conditionally released

If it is determined that an object qualifies to be fast tracked, you can set the **Fast track qualified?** indicator accordingly. Once set for fast tracking, the object may receive special attention, require fewer consistency checks, and involve higher management roles, resulting in faster processing.

You set the fast track indicator as follows:

1. Open the object.

2. From the **Overview** tab, click **More commands** ••• > **Edit** > **Start Edit**.

3. In the **PROPERTIES** section, select **Fast Track Qualified?**.

4. Click **More commands** ••• > **Edit** > **Save Edits** .

The object is marked as fast tracked. If the object has open action items, the **Conditional Release** value is set to **True** by the system, and the object can pass gates despite the presence of open action items. Once all action items are closed, the system automatically updates the **Conditional Release** value to **False**, and stakeholders are notified.

Claim a workflow task

You can make yourself the responsible party for a task that is assigned to a particular role. You can also perform a task without first claiming it.

To claim a workflow task:

1. In Active Workspace, go to your Inbox.

2. Click the **Team** tab to view the tasks available to your role.

3. Click **More commands** ••• > **Manage** → **Claim workflow task**.

   The task is assigned to you, and you can perform it at a later time. The task appears in your **Inbox**.

4. To mark the task as complete, on the **Overview** tab, click **Complete**.

Approve or reject a task

To approve or reject a task:

1. In Active Workspace, go to your Inbox.

2. Click the **My tasks** tab.

3. Click the **Perform Signoff** task and view the requisite details.

   - The work area displays the properties of the task, including a brief description, the owner, and a due date. It also displays a list of attached objects.

   - You can see the task in the context of the current task. Select the **Workflow** tab to get more information about preceding tasks, such as the decisions were made on a **Perform Signoff** task, or on an upcoming task. You can also select a future **Select Signoff Team** task and make the assignments.

   The **Overview** tab displays the **Action** panel with the embedded actions **Approve** and **Reject** available.

4. Click **Approve** or **Reject** as applicable.