TEAMCENTER

Initiative Lifecycle Management

Teamcenter 2412

SIEMENS

About Siemens Digital Industries Software

Siemens Digital Industries Software is a global leader in the growing field of product lifecycle management (PLM), manufacturing operations management (MOM), and electronic design automation (EDA) software, hardware, and services. Siemens works with more than 100,000 customers, leading the digitalization of their planning and manufacturing processes. At Siemens Digital Industries Software, we blur the boundaries between industry domains by integrating the virtual and physical, hardware and software, design and manufacturing worlds. With the rapid pace of innovation, digitalization is no longer tomorrow’s idea. We take what the future promises tomorrow and make it real for our customers today. Where today meets tomorrow. Our culture encourages creativity, welcomes fresh thinking and focuses on growth, so our people, our business, and our customers can achieve their full potential.

Support Center: **support.sw.siemens.com**

Send Feedback on Documentation: **support.sw.siemens.com/doc_feedback_form**

Contents

Initiative Lifecycle Management overview

What is Initiative Lifecycle Management? 1-1
Understanding the Initiative Lifecycle Management business process 1-2
Initiative Lifecycle Management terms in Teamcenter 1-3

Installing and Administering Initiative Lifecycle Management

Installation and prerequisites 2-1
Designate a plan template for process groups 2-1

Using Initiative Lifecycle Management

Managing Program 3-1
- Add a campaign to a program 3-1
- Define a governance team for a program 3-1
- Manage brands 3-1
- Assign an expectation score for a program 3-2
- Manage risks and opportunities 3-3
- Add program deliverables 3-4

Managing Project 3-4
- Create a project plan for an idea 3-4
- Add an idea to a project 3-5
- Relate a product to a project 3-5
- Assign a potential score for a project 3-5
- Fast track qualification 3-6
- Create a business case for a project plan 3-6
- Create a project plan request 3-7
- Generate a process plan request 3-7
- Create a development brief 3-7
- Reassign a project to a new program 3-8
- Bundle deliverables 3-8
- Create an action item 3-9

1. Initiative Lifecycle Management overview

What is Initiative Lifecycle Management?

With the demand for quick and frequent product launches resulting in shortened product lifecycles for a faster time to market, traditional program and project management methodologies must give way to newer approaches to suit organizations' business processes.

Initiative Lifecycle Management (ILM) unifies all relevant business processes from ideation to production into a single adaptive system. This includes the management of campaigns, ideas, programs, and projects. ILM leverages Program Planning capabilities and combines those with functional process groups that distribute work to the disciplines involved. The solution enables the orchestration of many process groups running in parallel, providing mechanisms to allow for improved interaction between the processes and leveraging the common platform for information interdependencies.

Where do I go from here?

Administrator	
Install Initiative Lifecycle Management.	Refer to the following: • Initiative Lifecycle Management 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.
Understand the Initiative Lifecycle Management business process.	Start by looking at the Initiative Lifecycle Management business process at a high level.
Learn about campaign and idea management in detail.	Refer to the campaign management and idea management overviews in Initiative Planning.
Use the Initiative Lifecycle Management solution.	Start by initiating a project.

Understanding the Initiative Lifecycle Management business process

Let us understand how programs and projects are managed in ILM with the help of a scenario of a company that manufactures smoothies and aims to make its products eco-friendly.

Once a viable campaign named Sustainable digital enterprise with associated ideas is identified, the program manager Otto creates a program named Sustainable digital enterprise program and associates the campaign with it. Otto also establishes a governance team which includes a sponsor, and himself.

To support the prioritization of program, Otto defines an expectation score for the program by analyzing the key performance indicators (KPIs), in relation to the market, revenue, and strategy. Additionally, Otto captures a risk of product packaging material not passing the regulatory compliance testing. To avoid this risk, he captures the opportunity of using an eco-friendly packaging material.

The project manager Lina creates a project named Eco-friendly smoothies and associates the Eco-friendly packaging for smoothies idea with it. She also associates this project to the Sustainable digital enterprise program. Lina defines an expectation score for the project by analyzing the KPIs, in relation to the market, revenue, and strategy. She compares the expectation scores of the project to that of the program to identify if the project meets, exceeds, or misses expectations. Based on the analysis, the project is marked as a candidate for fast-track execution or termination.

To provide further insights, Lina attaches a development brief that illustrates the feasibility, quality, regulations, and producibility of the eco-friendly smoothie pack. She also identifies the SKUs affected by the eco-friendly packaging as project deliverables. Based on the specifications defined on these SKUs, Lina creates process groups or sub-projects, assigns the deliverables to the responsible users, and starts executing the plan. This moves the project and the program along the workflow, from the planning phase to the execution phase.

Initiative Lifecycle Management terms in Teamcenter

Object	Description
Campaign	Captures information in an organized manner to achieve the goal over an extended period.
Idea	Captures the thought or concept that could eventually pave the way for a project or product request.
Window of Opportunity	Identifies a period created in the context of a campaign or market analysis during which some action can be taken that will achieve a desired outcome.
Business Case	Captures the reasoning for initiating the project and includes assumptions, constraints, and product potential.
Market Analysis	Captures the trends, implications, customer profile, competitive analysis, and projections.
Plan Request	Records the information used to launch a new project.
Action	Comprises a discrete task that must be accomplished, usually by a single individual or a small team or group.
Process Group (Subproject)	Refers to a functional group that breaks down a project into subprojects.

2. Installing and Administering Initiative Lifecycle Management

Installation and prerequisites

Note:

Initiative Lifecycle Management requires the Initiative Planning solution. Refer to the Initiative Planning help for details about this prerequisite solution.

To install Initiative Lifecycle Management, select the following applications:

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

Note:

Refer to Price book for prerequisite products.

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**.

3. Using Initiative Lifecycle Management

Managing Program

Add a campaign to a program

Add a campaign to a program as follows:

1. Open the program.

2. Click the **Campaigns** tab.

3. In the **CAMPAIGNS** section, click **Add** ⊕.

4. In the **Add** panel, use the **Search** tab to find a campaign.

5. Select the campaign to add and click **Add**.

   The campaign is related to the program and is listed in the **CAMPAIGNS** table. The windows of opportunity information is listed in a table on the **Timeline** tab.

Define a governance team for a program

You can assign sponsors and a program manager for governing a program.

1. Open the program and click the **Governance** tab.

2. Click **More commands** ••• > **Edit** > **Start Edit** .

3. Use the list to choose one or more sponsors in the **SPONSORSHIP** section.

4. Choose a program manager from the list in the **LEADERSHIP** section.

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

   The governance team selections are saved and the entries are displayed in the tables.

Manage brands

Define brand strength

Brand strength is the value carried by a brand, denoting the perception of consumers toward the brand or the value invested in it over a time period.

Note:

Learn more about brand management in Consumer Packaged Goods.

Define brand strength as follows:

1. Open the brand item.
2. Click **More commands** ••• > **Edit** > **Start Edit** .
3. In the **PROPERTIES** section, use the list to select a numerical value between zero and ten for **Brand Strength**.
4. After selecting a value, click **More commands** ••• > **Edit** > **Save Edits** .

Designate a brand owner

Designate a brand owner as follows:

1. Open the brand item and click the **Stakeholders** tab.
2. Click **More commands** ••• > **Edit** > **Start Edit** .
3. Select a brand owner from the list.
4. Click **More commands** ••• > **Edit** > **Save Edits** .

Assign an expectation score for a program

To support the prioritization of programs, you can define an expectation score for a program. Various categories such as market, strategy, and revenue are assigned a score in order to be measured against.

Define an expectation score on a program as follows:

1. Open the program and click the **Overview** tab.
2. Click **More commands** ••• > **Edit** > **Start Edit** .
3. In the **EXPECTATION** section, click the table cells and choose from the lists to fill in the values. Click ⊕ to add additional rows.
4. When the table is complete, click **More commands** ••• > **Edit** > **Save Edits** .

   The expectation values are saved and displayed in the table.

Manage risks and opportunities

View all risks

You can view a rollup of all the project risks at the program level.

1. Open the program.
2. Click the **Risks** tab.
3. View the risks in the **PROJECT RISKS** section. Open each item to view more details.

View all opportunities

You can view a rollup of all the project opportunities at the program level.

1. Open the program.
2. Click the **Opportunities** tab.
3. View the opportunities in the **PROJECT OPPORTUNITIES** section. Open each item to view more details.

Create campaign opportunities

Opportunities can be defined for a campaign. These campaign opportunities supplement any program opportunities identified at the program or project level.

When a campaign is related to a program, the program opportunities appear in the **PROGRAM OPPORTUNITIES** table.

Create a campaign opportunity as follows:

1. Open the campaign and click the **Opportunities** tab.
2. In the **CAMPAIGN OPPORTUNITIES** section, click **Add** ⊕.
3. In the **Add** panel, enter a name, target dates, and any other optional information.
4. Click **Add**.

   The campaign opportunity is created, related to the campaign, and is listed in the **CAMPAIGN OPPORTUNITIES** table.

Add program deliverables

Different kinds of items such as package artwork, and design briefs can be added as program deliverables.

Add program deliverables as follows:

1. Open the project and click the **Deliverables** tab.
2. In the **DELIVERABLES** section, click **Add** ⊕.
3. In the **Add** panel, create a new deliverable from the **New** tab, or find and add an existing deliverable using the **Search** tab.
4. Click **Add**.

   The deliverable are added to the project and are listed in the **DELIVERABLES** table.

Managing Project

Create a project plan for an idea

Once an idea is approved, it can be used to initiate a project.

Create a project plan as follows:

1. Open the idea.
2. Click **More commands** ••• > **New** > **Create Plan** ⊕.
3. In the **Create Plan** panel, click ⊕ **Add** in the **PLAN TEMPLATE** section, and select a template to use.

   The available templates are based on the idea's category.
4. Enter a name, fill in any of the remaining optional properties, such as the prime event date (start date).
5. In the **PARENT PLAN LEVEL** section, click ⊕ **Add**.
6. Search for and select the appropriate program to associate and click **Add**.
7. Click **Create**.

A project plan is created using the selected template and gets added to the selected parent program.

Add an idea to a project

Add an idea to a project as follows:

1. Open the project.

2. In the **IDEAS** section, click **Add** ⊕.

3. In the **Add** panel, use the **Search** tab to find the appropriate idea.

4. Select the idea to add and click **Add**.

   The Idea is related to the project and is listed in the **IDEAS** table.

Relate a product to a project

Relate a product to a project as follows:

1. Open the project and click the **Overview** tab.

2. From the **PRODUCT VARIANTS** section, click **Add** ⊕.

3. In the **Add** panel, create a new product from the **New** tab or find and select an existing product using the **Search** tab.

4. Click **Add**.

   The product is related to the project and is listed in the **PRODUCT VARIANTS** table.

Assign a potential score for a project

To help analyze how beneficial a project is, its potential is defined as a score. This is done considering key performance indicators, typically in relation to the market, revenue, and strategy. These values are then compared with program expectations to identify which projects meet, exceed, or miss expectations. Once analyzed, these projects may be marked as candidates for fast-track execution or for termination.

Define a potential score on a project as follows:

1. Open the project and click the **Overview** tab.

2. Click **More commands** ••• > **Edit** > **Start Edit**.

3. In the **POTENTIAL** section, click the table cells and choose from the lists to fill in the values. Click ⊕ to add additional rows.

4. When the table is complete, click **More commands** ••• > **Edit** > **Save Edits**.

   The potential values are saved and displayed in the table.

Fast track qualification

If an idea qualifies to be fast tracked, you can set the indicator accordingly. Once set for fast tracking, the idea may receive special attention, require less consistency checks and involve higher management roles, resulting in faster processing.

Set the fast track indicator as follows:

1. Open the idea.

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

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

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

   The idea is marked to be fast tracked.

Create a business case for a project plan

A business case captures the reasoning for initiating a project or task. It defines the product type, concept, and differentiators, contains assumptions and constraints, and describes product potentials.

Create a business case in the context of a project as follows:

1. Open the project and click the **Business Cases** tab.

2. In the **CONSOIDATED BUSINESS CASES** section, click **Add** ⊕.

3. In the **Add** panel, enter a name and fill in any of the remaining optional properties such as product type, assumptions, and constraints.

4. Click **Add**.

   The business case is created, related to the open project, and is listed in the **CONSOLIDATED BUSINESS CASES** table.

Create a project plan request

Some or all of the deliverables for a project might require subprojects. To add subprojects, you must create a project plan request.

Create a plan request as follows:

1. Open the project and click the **Deliverables** tab.
2. Select one or more deliverables in the **DELIVERABLES** table.
3. In the **PLAN REQUEST** section, click **Add Plan Request** ⊕.
4. In the **Add Plan Request** panel, enter a name and click **Add**.

   The plan request is created.

Generate a process plan request

Generate a process plan request as follows:

1. Open the project plan request.
2. In the **PROCESS GROUP PLAN** section, select a process group template by clicking the appropriate table cell and choosing from the list.

   The list of available templates changes based on the discipline values that the administrator sets on the process groups.
3. Click **More commands** ••• > **New** > **Process Plan Request** ⊕.

   The process group is created.

Create a development brief

A project manager creates a development brief to capture specific requirements for projects based on the marketing requirements. On creating a development brief, the marketing brief and campaign brief associated with the project are automatically attached to the development brief.

Procedure

1. Open the project.
2. Select the **Top Bottom** view.

3. Select the **Development Briefs** tab.

4. Click **Add**.

5. In the **New** panel that is displayed, specify the properties such as name and description.

6. (Optional) To create the development brief based on a template, select a template from the **Template** list.

7. Click **Add**.

   The development brief is created. The marketing brief and the campaign brief belonging to the project are placed below the development brief.

Reassign a project to a new program

Reassign a project to a new program as follows:

1. Open the project and click the **Overview** tab.

2. Click **More commands** ••• > **New** > **Reassign Parent Plan**.

3. In the **Reassign Parent Plan** panel, search for and select the program to assign.

4. Click **Reassign**.

   The project is reassigned to the selected program.

Bundle deliverables

You can bundle deliverables so that they are tracked under the same project or subproject.

Bundle deliverables as follows:

1. Open the plan request.

2. In the **Plan Clone Table** of the **PROCESS GROUP PLAN** section, select the deliverables to bundle together.

3. Click **Create Bundle**.

   The selected deliverables are bundled together and are managed by a single project.

Create an action item

An action item is a discrete task that must be accomplished, usually by a single individual or a small team or group. Action items typically result from meetings and must always be clearly documented. Action items for an idea can be created and tracked from the **Actions** tab and can subsequently be used in workflow processes and assigned to owners.

Create an action as follows:

1. Open the idea.

2. Click the **Actions** tab.

3. In the **ACTIONS** section, click **Add** ⊕.

4. In the **Add** panel, enter a name and fill in any of the remaining optional properties, such as priority, urgency, and due date.

5. Click **Add**.