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1. Introduction

Many Brand Owners are tackling large, complex packaging programs (campaigns) which span across packaging ideation to delivery of individual packaging to specific markets. Typically these efforts involve several parallel and sequential projects. While a packaging project involves dealing with a relatively short-term objective, a Packaging Program (Campaign) is much more complex and deals with several short-term and long term objectives and requires a large pool of resources.

Accomplishing a program's objectives involve planning and conducting a number of related projects, multiple work streams with their own requirements and planning, the results of which are components of the overall outcome.
2. Program Management Related Components

WebCenter has features to specify components, create a group of projects in a Program hierarchy and modify them as needed.

WebCenter Program management offers:

- **Component definition and approval**
- **Creation of Child Projects under the hood of a Program**
- **Ability to attach (and remove) existing projects into a Program**
- **Communication between the Program and its Projects.**
- Features to support multiple levels: for example, a Project/Grouping/SKU/Component.
- Shared Projects and Components among different Programs
- A Program Overview with drill-down and Dashboard. The program overview will provide the status and risk indicators.

### 2.1 Definition and Approval of Components

Program planning may require multiple iterations and produce multiple work products and components. As a first step, you need a Program (Parent Project) setup which describes the outline, rationale, launch criteria, important dates and involved regions and suppliers. The second part deals with the individual or child projects within the Program which are entirely dependent on the products and component planning.

**Defining Products and Components in the Briefing Phase**

To start a Program with new Products and Components, the Program Manager can use a placeholder document(*Document Templates*). To define existing components, just refer to them as *Document References* or copy them to the current scenario. You can source the components from existing libraries, contextual saved searches, or from a previous program.

If you have configured a *duplicate* action, the user can easily create a copy of the component (for example, variants) including its meta-data and document references values.

See the example below. The following structure can be built into your Program Template using its *Attribute Category*’s document sources.
For example, when you initiate a Program for multiple SKUs, you can use Document Templates for new SKUs. The Products can keep common approved Components as document references. Using the document reference table, you can:

- Define products and components along with their master-child relationships,
- Easily duplicate a Component with its meta-data
- Process them through an approval process if needed
See details about how to create Projects based on these documents in *Adding/Creating Projects in a Program* on page 6.

### 2.1.1 Create Components

To streamline your Program's product and component definition, follow the steps below:

- Create an Attribute category for the Parent Project Template with document references and other Attributes.

  **Note:** Read more about shared Attributes in: *Create a Child Project* on page 9.

- Add Document References to the Program Template's Attribute Category.

- Define Document Sources for your Documents

- Define how these documents should appear in the Template

- Configure duplicate option in the rendering of the document references

### 2.2 Adding/Creating Projects in a Program

Once you have defined a Program or Parent Project with components, you can add multiple Child Projects as members in a few ways. You (as an admin user) need to configure actions in the menu for any of these options to become available.

You can:

- **Create Projects individually based on a Child Project Template.**
  
  This provides an interactive way of creating a child Project from the Program context. If you have common Attributes configured in both the Program and Child Template, they can be shared between the Parent and Child. For example, Program's Attributes such as milestones set in the Program and Role setup.

  *The administrator has to configure a Create Child action* for a Program Manager.

  The Child Project Template can have Attributes and documents that are not shared with the Program.

  **Note:** The Child Projects are independent WebCenter Projects that can have their own planning, workflows, folder structure etc.

  Read more in: *Create a Child Project* on page 9.

- **Create Projects using a workflow.**
  
  You can use workflow to create multiple Child Projects in one go. You can either add this step into a workflow or create a dedicated workflow action in Project details page.

  **Tip:** Create a custom workflow action for Project detail and apply it to the Program Manager’s menu. You can then select multiple documents and launch a workflow. You can use this more than once if you want to launch your Program in waves.
• **Add an existing Project.**

   You can add existing Projects to a Program. For example, you may want to use an approved SKU-project in a Program. The Attach action lets you select and add an existing Project as a child.

   Read more details in: *Attach Project Action in a Program* on page 10

• **Create a Sibling Project.** Create sibling action allows you to copy the setup from your existing Child Project to create exact replicas or variants with slight modifications. For instance, after creating component Projects, you may see that you need an extra component with the same requirements.

   It is possible to modify some Attributes after creation of a variant. Or you can disable copying of some elements by unchecking them. The options are the same as in *Create a Project Based on Another Project*.

   This action will be used when creating variants of the child project.

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**Note:** All these actions are configurable and you can configure the actions that are most relevant in your Program-Project hierarchy.

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**Notes**

• You need Change Property rights (in both levels) to establish a relationship between parent and child.

• A project can have multiple children and can have multiple parents.

• All relationship changes are logged in the Project history.

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**2.2.1 Configure Create Child Action in Program's Details**

As an Administrator user, you can customize the Project Details actions to include a Create Child Project action.
- Go to **Admin > Preferences > Menu > Actions > Project Details > Project Header**.
- Select the **Menu** you want to edit.
- From the **Action Gallery**, drag the **Create Child Project** to one of the **Custom** boxes.

Read more in: [How to Create a Custom Action Button](#)

- Edit the settings of this **Action**. You can customize this to suit your needs. See more in: **Action Settings**.
We recommend that you do the following optional steps:

a) Select the users for whom you want to make this Action Visible To. In the example, this Action is set only for Project Managers.

b) Select a Child Project Template. This will be the Template that will be loaded when a Project Manager (user) click on this action.

Note: If a Template is not specified in this action, your user can:
- either select a Template that is available in the system
- or create a Project without a Template

c) Specify a Project Visibility characteristic.

1. Create a specific Characteristic for configuring a menu item. You can create characteristics for your custom menu items as well as the default ones.
2. Select the specific Characteristic in the Project Visibility field of the action. You can select this from the drop down list.

This menu item will appear in the Project Details page only if the specified Characteristic was assigned to the project or the template.

As an administrator, you can switch this on and off in the Project Details > Characteristics page.

• Save.

2.2.2 Create a Child Project

To create a new Project as a child project of a Program, you (admin) can configure a Create Child Action in the Program. Once configured, the Program Manager and the Project Members will be to create Child Projects in your Program.

The Child Projects inherit the attribute values, role assignments and company information from the Program, and they can have their own set of attributes and workflows.

The Project creation uses the Template configured in the menu. For example, if the custom action links the template “Child Project Template”, then this is used in creating the child Project.

The child inherits most of the setup from the Template except the values of:

- Company / Location
- Attribute Values
- Role Assignment

Notes
- The Attribute categories are inherited from the Template (used to create the child Project) and the values of the common Attributes (present in both Parent and Child Templates) will be inherited from the parent.
Note:
- If a common attribute has an empty value in the Parent, the value will be taken from the Child’s template.
- Similarly, the Roles are taken from the Template but the assignment of the Roles will be taken from the Parent. If the Roles are not assigned in the parent, the assignment will be inherited from the Template.

Caution:
If the Parent and the child Project’s template have different role assignments, the assignment of the parent project is taken.

- If a Template is not specified in this action, your user can:
  - select a Template that is available in the system.
  - or create a Project without a Template

Note:
You can have a document source with a SmartName search to point to the parent Project.

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2.2.3 Attach Project Action in a Program

To add Projects to a Program, you need a Saved Search configured in your Program to list ‘related’ Projects.

The administrator can specify the Saved Search that should be used to search and find these possible child projects.

To create a custom Link Existing Projects Action in the Project Details (of the Program), follow the steps below:

1. Go to Admin > Preferences > Menu > Actions > Project Details > Project Header.
2. Select the Menu you want to edit.
3. From the Action Gallery, drag the Link Existing Project to one of the Custom boxes.

   This Action is available in Project Search Results by default.

4. Edit the settings of this Action. You can customize this to suit your needs. See more in: Action Settings.
   a) Select the users for whom you want to make this Action Visible To. In the example, this Action is set only for Project Managers.
   b) Select a Saved Search. This will be the displayed in the pop-up to select a Project.

   Specifying a Saved Search (for example, based on common attribute values) in the Attach action allows you to configure a pop-up dialog with the most relevant projects.
   c) Optionally, specify a Project Visibility characteristic. Select the specific Characteristic in the Project Visibility field of the action.

This menu item will appear in the Project Details page only if the specified Characteristic was assigned to the project or the template.
As an administrator, you can switch this on and off in the Project Details > Characteristics page.

In the Program's details, you can use this Action to select Projects (from a Saved Search) and add to the Program.

2.2.4 Add Sibling Projects

If you want to clone a Child Project within the context of a Program, configure the Create Sibling Project action in the Project details page.

You have to configure the action in the Child Project Details and make sure that it is applied to the Project Managers' menu.

The cloned sibling will be a copy of the child Project from which the action was started and it will also have the same Parent Project.

Notes

• If the child Project has multiple parents, the cloned Project inherits all the parents where the Project Manager has “change property” permissions.
• In the original parent project, an entry in the action history is added to indicate that the new project was added as a child.

Create a Sibling Project

1. Click the Create Sibling action button from a child Project of your Program.
2. In the Copy setup from an Existing Project pop-up, select what you want to copy (and deselect what you don't want to copy).

For Tasks, you can choose to copy the Tasks from the original Project or from another project by typing in the template name. The default setting is to copy Tasks from the Project that is being copied.
Click OK.

3. Fill in the new project's Details.

4. If desired, add Documents to the project.

5. Add Members to the project.

6. If the template has attributes defined, fill them in the Attributes section.

7. Click Create.

This brings you to the new project’s details page.

### 2.3 Remove Projects from a Program

You can configure and use **Detach** and **Delete** actions in a Program.

- If you want to remove child Projects permanently from the system, select them in the child Projects tab of a Parent Project and click **Delete** action.
- To remove some child Projects from a Parent, use the **Detach** action. This action removes them from the parent, but does not delete them from the system.

This is a configurable action that has to be set up in the Saved Search displaying child Projects. Read more in: **Detach Child Projects** on page 12.

#### 2.3.1 Detach Child Projects

You can configure **Detach Child Project(s)** operation in a Saved Search. Program Managers can use this in a contextual Saved Search configured in the Parent Project’s details. The use case is that the Project or Program Manager can select existing Child Projects displayed in the search tab and detach them from the Parent Project.

**Note:** The action is only available to the users with **Change Permissions** of the parent and child project.

- Create a global **Saved Search** to search on child Projects. Enable the **Search Result Layout** option **Allow Detaching Child Projects**.
- Apply the Saved Search into the Project Details menu of the Parent Project Manager.
- To detach child Projects, go to the Child Projects tab with the saved search, select child Projects and click **Detach Child Project(s)**.

### 2.4 Program Dashboard with a Drill-down View

You can also build different types of overview on on-going programs as a way to easily monitor your Program and Projects. The solution allows you to build overviews at all levels of your Program hierarchy.

The admin can create searches with any relevant criterion and use them in different levels of the Project drilldown.

To build a high level overview, use the following advanced the Saved Search features:
The drill-down feature allows you to quickly access the specific Projects or Components that require special attention.

**Drilldowns**

You can use Project search based **drilldowns** to set up a:

- Drill-down into all levels of Projects. This feature allows the Program Manager to explore project data beyond the overview. If you have a nested structure (Project / Grouping / SKU / Components) in your Program, an expand button lets you access the next level.
- Drill-down into Components (documents) or Tasks

Read more in: [Configuring a Drilldown Search](#)

The example screenshot gives an overview where the Program Manager can quickly zoom into Programs based on their status (which in turn is based on the status of their child Projects).

1. The parent Search with Programs. This example shows a **Search Results Dashboard** with **counters**.
2. The second level of Drilldown which executes the **Saved Search** specified in the parent search. This search contains a **Dashboard** with a **Facet Graph**. [Configuring a Drilldown Search](#)
3. The third level of **Saved Search** with a **Document Search**.
4. The expand button to execute the drilldown.

**Dashboards**

The interactive **dashboards** can be configured with:

- **Counters**.
You can, for example, build a diagnostic overview of the status of your Program using counters. You can, for example, show the Project Statuses in these traffic light counters (at risk, in delay, or on track). With a simple click on one of these counters, you can zoom into the relevant Projects.

In the example above, a click on the “On Track” counter will display the search results for specified in the counter configuration. The status is only an example, you can build your counters based on any relevant Attribute that you may want to monitor. Each counter has it’s own saved search and displays the count of the results.

Read more in: Building a Search Based Counter.

• Charts to visualize your Program data.

You can configure facet based Charts in dashboards and use them in your Program hierarchy to visually display the Program data. The Charts(based on facets) shows the distribution of values.

A simple click on a chart section(value) will refine the results. In the screenshot, the counters provide the most high level overview where as the first level drill-down displays a pie chart which shows the distribution based on Project Status.

**Overview from Programs and Projects**

In addition to the overview of all Programs and their drilldowns, you can also configure contextual saved searches for your Parent Project Details menu. If you are a Program Manager working in a Program’s details page, you may need direct access to the child Projects. Likewise, from each of the Child Project, there should be access to the parent or Program.

To configure this:

1. Create a Saved Search for Parent Projects. Similarly, create another Saved Search for Child Projects and plug this into the Parent’s Project Details menu.

   **Tip:** Use SmartNames to use Saved Searches in the context of a Program or Project. If you set the Parent Project as the [Project id], your results will list all the Child projects of the current project. See more in: SmartNames in Search

2. Plug these searches into Project Details menu and apply it to the relevant users (Program Managers and Project Managers).

**2.5 Communication Channels-Rules**

Since the projects are children or sub-projects of the overall program (campaign), there is a need for communication among all levels, program to projects, projects to program and among projects. The updates happening in a program have mutual consequences and therefore should be communicated in both ways. You may want to setup the following channels:

• Alert the parent or a related project about a new deliverable
• Alter the status of a related Project depending on another
• Notify Program when a child Project encounters change: a status update or metadata change.
Rules in Programs and Projects
The Administrator of the system can configure "actions" "triggered" by an "event". These are Rules that can be specified in the Program/Project's templates. Rules enable you to start tasks automatically based on events in your project.

The triggered actions will be implemented in the Program or Project specified in the attached "action" (Task based Action). You can use the JavaScript node in the Task to execute these actions.

The configuration of the Rules is based on Program/Project Template and therefore, once setup, can be reused (or exported) in future Programs.

See some examples of Task based Actions below:
• If a child Project's status changes to Overdue, change the status of the Program to At Risk
• Change attribute values in a Program based on the values in the child Project
• Calculate task overdue status every hour and send reminders

The JavaScript node allows you to enables you to update crucial parameters of related Projects. See details in the Workflow section.

2.5.1 Configure Rules in a Project

What is a Rule?
You can configure a Rule to execute specific Actions based on one or more Trigger events. The Rule sets reside in Project Templates and will be applicable in all Projects created from them, including the previously created ones.

You can use this feature to communicate between Child and Parent Projects or between any two Projects. See an example use case at the end of this chapter.

As an Admin user, you can configure the Rule settings in a template. You can find these settings in the project or template's Configure section, under the Rules tab.

Triggers
A Trigger is an event that happens in the system (for example, the Child Project Status changes to Completed). A successful Trigger condition will execute a Task based Action (Start A Task).

You can specify multiple triggers and actions in a Rule. When one Trigger event (as specified in the Rule) happens, the system evaluates the Rule and executes the corresponding Action(s).

See the supported Triggers below:
• Project Status Change: The Action is executed when the Project Status changes.
• Project Attribute Change: The Action is executed when the specified Project Attribute changes. You can specify the attribute from a drop-down.
• Project Due Date Change: Any change in the Project Due Date will trigger the specified Action.

You need the WebCenter Task Management Advanced or WebCenter Life Cycle Management license to be able to define Rules.

Actions
You can configure a Start Task action which will start a Task in the same Project where the Rule is configured. Specify the Task by selecting it from the drop-down. It is possible to configure multiple actions by clicking on the ‘+’ sign. Use ‘x’ to remove existing actions.
**Tip:**
Use a *JavaScript* based workflow to implement actions in related Projects (such as in Parent Projects or in Child Projects).

**Example**

See the example of a child Project Template’s Rule below. This Rule gets executed when the specified attribute (*Project Status*) changes.

When the attribute changes, the Task (Child Project Status Attribute Change) will get executed. If the Child Project’s attribute *Project Status* changes to *At Risk*, the specified *JavaScript* based workflow will change the Parent Project’s attribute value as *At Risk*. 