Oracle® Retail Brand Compliance Management Cloud Service

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Primary Author: Bernadette Goodman

Contributing Author: Simon Tucker, Aidan Ratcliffe

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Oracle Retail Brand Compliance Managment Cloud Service Project User Guide, Release 18.2

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Preface

This document describes the Oracle Retail Brand Compliance Management Cloud Service Project user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

Audience

This document is intended for the users of the Oracle Retail Brand Compliance Management Cloud Service Project module.

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Related Documents

For more information, see the following documents in the Oracle Retail Brand Compliance Management Cloud Service Release 18.2 documentation set:

- *Oracle Retail Brand Compliance Management Cloud Service Administration Guide*
- *Oracle Retail Brand Compliance Management Cloud Service Implementation Guide*
- *Oracle Retail Brand Compliance Management Cloud Service Release Notes*
- *Oracle Retail Brand Compliance Management Cloud Service User Guide*

For information on the Oracle Retail Brand Compliance Management Cloud Service modules, see the following documents:

- *Oracle Retail Brand Compliance Management Cloud Service Product User Guide*
- *Oracle Retail Brand Compliance Management Cloud Service Reports User Guide*
- *Oracle Retail Brand Compliance Management Cloud Service Supplier User Guide*

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Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Introduction

Project is a project management system based on the use of predefined templates for Projects, Briefs, and Activities:

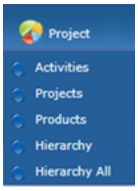
- Projects, whether a single project or a combination of sub-projects, typically end with the product-specific elements which can be linked to the product record and specification.
- Within each of these elements, whether a Project or Project (product) template, there are key details entered plus a list of activities.
- Each Activity has a specified number of working days, responsibilities, keys, gates (locks), specification links/Activity indicators, and so on, which when added together, create a critical path and project time line.
- Wherever possible, the commencement/completion of an Activity automatically updates the Project workflow. This reduces the need for users to access the project plan and separately confirm tasks have been commenced/completed.

Accessing Project

After logging into the system, users see an option to access Project from the main navigation bar at the top of the screen.

To access a Project option, select the option from the Project drop-down list.

Figure 1–1 Project Drop-Down List



The Project Administrator and Project Manager roles are only given to Retailer users. Supplier users have access to projects associated to their supplier/site.

Access to Project functionality is restricted by the following roles:

Project Administrator

This can be assigned to Retailer users who need to configure Project, Product, and Activity templates and the associated administration options.

If you have been assigned the Project Administrator Authority Profile, you can do the following:

- Access the Administration area and create, amend, or delete what has been set up for Project, such as, templates, teams, and pick list values.
- Create, amend, or delete Projects, Activities and Briefs.
- Schedule projects.
- Unlink records from a project.
- Access and maintain the system calendar.
- Access the Global Changes option to reassign the project managers.

Project Manager

This can be assigned to users who need to create projects and edit schedules.

If you have been assigned the Project Manager Authority Profile, you can do the following for those projects for which you are responsible:

- Access the Administration area and view what has been set up for Project, such as, templates, teams, and pick list values.
- Create, amend, or delete Projects, Activities and Briefs.
- Schedule projects.
- Unlink records from a project.

Getting Started

Before using Project, be sure that you are familiar with the user interface. If you need more information, see the *Oracle Retail Brand Compliance Management Cloud Service User Guide*. This User Guide covers the login, home page, and user interface.

2

Retailer Users

This chapter describes how the Project options are used by Retailer users. For information on each option, see the following section:

- Activities Option
- Projects Option
- Products Option
- Hierarchy Option
- Hierarchy All Option

For users with Administrator access for Project, see the *Oracle Retail Brand Compliance Management Cloud Service Administration Guide*.

The list views have the following options in the View Selector drop-down list:

- Associated: You can select to see entries for which you have been assigned as Owner, Responsible, or Viewer.
- Owner: You can select to see only the entries for which you have been assigned as Owner.
- Responsible: You can select to see only the entries for which you have been assigned as Responsible.

Some lists include Key and Gate columns. These are used within an Activity to force completion of previous activities so that the activities adhere to the critical path. An Activity Gate can be locked, that is, cannot be completed without previous Activity (key or keys) being completed.

Table 2–1 describes the icons in those columns.

Table 2–1 Icons for Key and Gate Columns

Icons	Description
△	Indicates this is a Project record.
◊	Indicates this is a Product record.
	Indicates the Activity Key field is set to Yes.
	Indicates that the Activity Gate field is set to Yes and preceding keys are complete.
	Indicates that the Activity Gate field is set to Yes and preceding keys are not all complete.

Activities Option

To navigate to the activities you need to complete, select the Activities option. When you select this option, a tab opens with a default list view of Activities for which you have been assigned as being Responsible. For each activity, the following information is shown:

- Proposed End Date
- Activity Name
- Project Title
- Description
- Project
- Sequence
- Proposed Start Date
- Actual Start Date
- Duration
- Status
- Sub Status
- Critical Path
- Key
- Gate

The following actions are available on this page:

- View: Select an activity from the list. The Activity record opens in read only mode.
- Edit: Select an activity from the list. The Activity record opens in edit mode.
- Change Status and Exit

  There are two ways to update the status for activities:

  - Select multiple entries in the list. Select the Change Status and Exit action by either right-clicking or selecting it from the Actions menu. Then, select the status change from the list.
  - Open an activity in edit mode. Select the Change Status and Exit action by either right-clicking or selecting it from the Actions menu. Then, select the status change from the list.

To navigate to the activities you need to complete, you can also use the Task App and Urgent Items Manager on the Home page. For more information, see the *Oracle Retail Brand Compliance Management Cloud Service User Guide*.

Projects Option

When you select this option, a tab opens with a default list view of Projects that meet the following requirements:

- The Project has activities that have not been completed.
- You have been assigned as being Responsible.
- The Project has not been cancelled or completed.

For each project, the following information is shown:

- Parent Project
- Project Title
- Project Type
- Template Type
- Proposed Start Date
- Actual Start Date
- Proposed End Date
- Proposed Launch Date

The following actions are available on this page:

- New Project: See "Creating a New Project."
- Add Project: See "Adding a Project to an Existing Project."
- Add Activity & Schedule: See "Adding an Activity and Schedule."
- Edit: See "Editing an Existing Project."

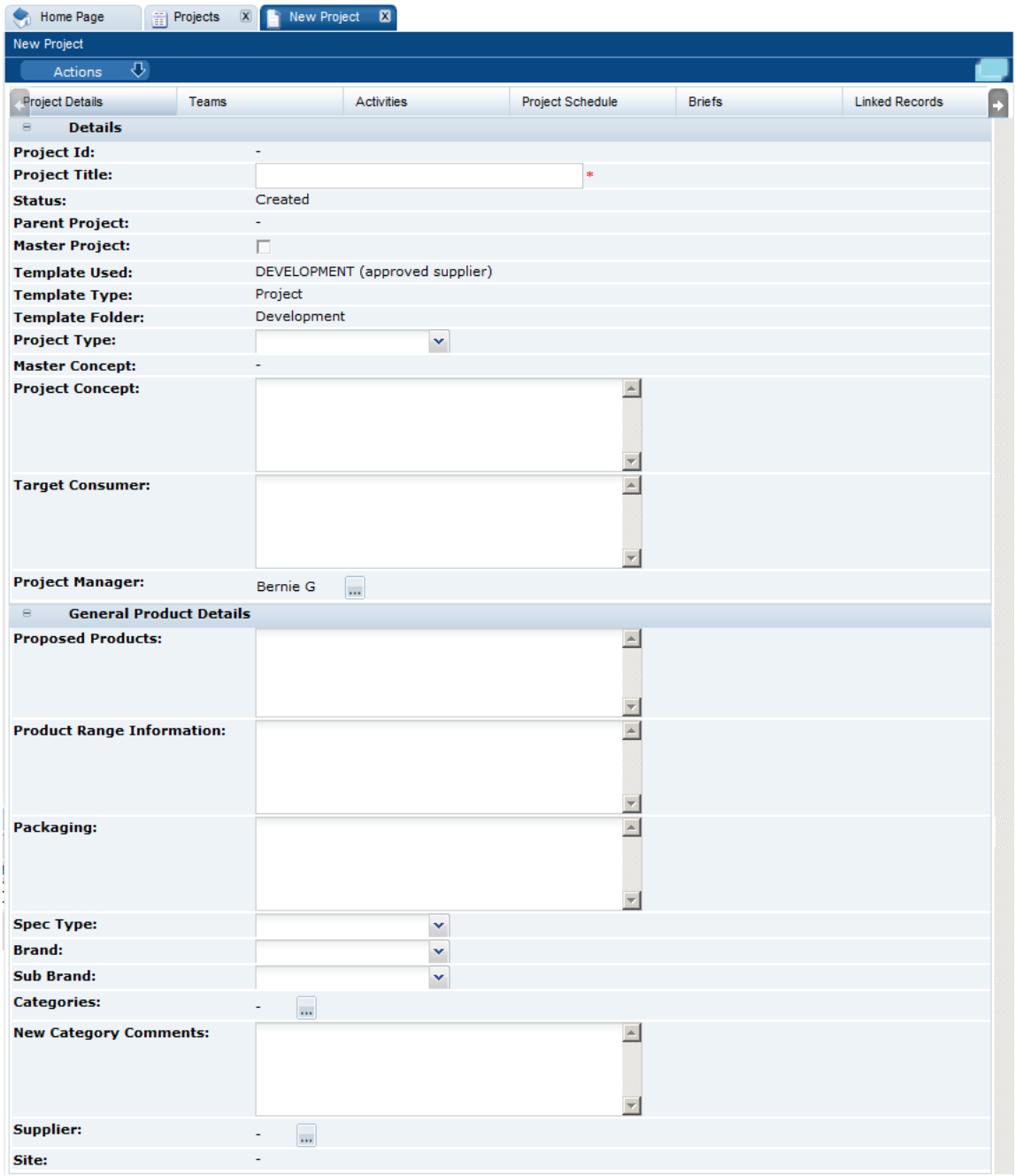
Creating a New Project

For information on creating Project Templates, see the *Oracle Retail Brand Compliance Management Cloud Service Administration Guide*.

To create a new project:

1. Select the New Project action. The Create Project dialog box opens:
   a. Select the folder containing the relevant project templates. Click the icon. In the Select Folder dialog box, select a folder from the list and click **Ok**.
   b. Choose the template from the selected folder. Click the icon. In the Select Template dialog box, select the project template and click **Ok**.
   c. The list of activities from the selected template are shown. Click **Ok**. The New Project tab opens.

Figure 2–1 New Project Page



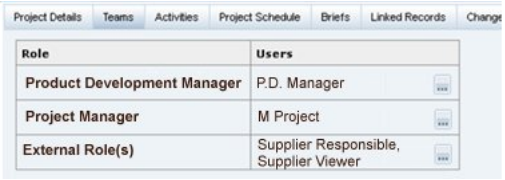
2. Enter the project details:
   - Project Id: The system assigns this ID when the project is created.
   - Project Title: The title must be unique within the system. This field is mandatory.
   - Status: The Status is set to Created.
   - Parent Project: If this new project is being added to an existing project, the parent project is shown here. The Parent Concept field is also shown.
   - Master Project: If this project is a master project within a hierarchy of projects, check the box.

- Template Used: This is the name of the template that was selected for this project in Step 1.
- Template Type: This is the type assigned to that template, that is, Product or Project.
- Template Folder: Location of the template.
- Project Type: Select the type from the drop-down list.
- Master Concept: If this project is selected to be a master project, enter an overview of the concept in this field.
- Project Concept: Enter an overview of this project concept.
- Target Consumer: Enter a description of the target consumer for this project.
- Project Manager: This is initially set to the user who is creating the project. To change a project manager, click the icon.

3. Enter the general product details. These fields are not mandatory:
   - Proposed Products
   - Product Range Information
   - Packaging
   - Spec Type
   - Brand
   - Sub Brand
   - Categories
   - New Category Comments
   - Supplier
   - Site
4. Open the Teams page.

   If the project template used to create this project had any activities specified, all the user roles specified in the activities linked to the project template are shown here.

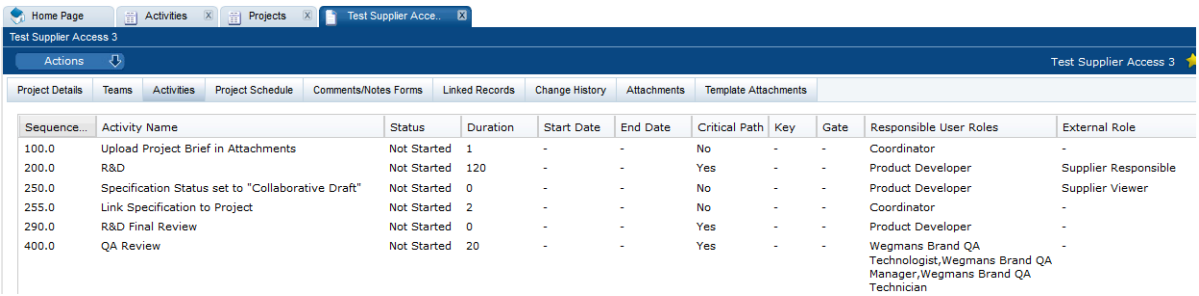
Figure 2–2 Teams Page



   To select users for each role, click the icon. The Select Users dialog box opens. Select the users from the list and click **Ok**.

5. Open the Activities page. Activities that were set up for the template are shown here.

Figure 2–3 Activities Page



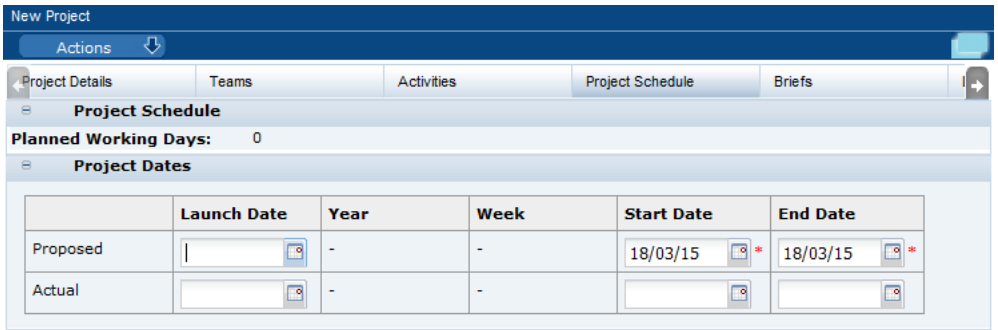
Sequence...	Activity Name	Status	Duration	Start Date	End Date	Critical Path	Key	Gate	Responsible User Roles	External Role
100.0	Upload Project Brief in Attachments	Not Started	1	-	-	No	-	-	Coordinator	-
200.0	R&D	Not Started	120	-	-	Yes	-	-	Product Developer	Supplier Responsible
250.0	Specification Status set to "Collaborative Draft"	Not Started	0	-	-	No	-	-	Product Developer	Supplier Viewer
255.0	Link Specification to Project	Not Started	2	-	-	No	-	-	Coordinator	-
290.0	R&D Final Review	Not Started	0	-	-	Yes	-	-	Product Developer	-
400.0	QA Review	Not Started	20	-	-	Yes	-	-	Wegmans Brand QA Technologist,Wegmans Brand QA Manager,Wegmans Brand QA Technician	-

You can add and remove activities from the list:

- To add activities, select the Add Activity action. The Add Activity dialog box opens. Select the activities from the list and click **Ok**.
- To remove activities, select the entries in the list and then select the Remove Activity action. The Confirmation dialog appears. Click **Ok**.

6. Open the Project Schedule page.

Figure 2–4 Project Schedule Page



	Launch Date	Year	Week	Start Date	End Date
Proposed		-	-	18/03/15 *	18/03/15 *
Actual		-	-		

The Start and End dates are mandatory fields. These dates are used for scheduling activities:

- Planned Working Days is initially set to zero. To calculate the number of working days, select the Schedule action. The number of planned days for activities on the critical path are added up and shown here.
- When a launch date is selected, the year and week are shown here based on the system calendar.

7. Open the Briefs page. Briefs that were set up for the project template are shown here. If additional activity briefs need to be added to the project, this can be done by adding an activity to the project which contains the additional briefs.
8. Open the Linked Records page. This page lists any links the project has with any records within the system. For information on adding and deleting linked records, see "Adding and Removing Links to Records."
9. Open the Attachments page. This page shows a list of documents that are attached to a project. Table 2–2 describes the columns on this page.

Table 2–2 Columns for Attachments

Column	Description
Download	Double-click the icon to download the file. The icon indicates the type of file, for example, Microsoft Excel spreadsheet or Word document.
File Name or URL	File name or the URL to the file.
Description	Description of the file.
Bytes	Number of bytes in the file.
Attached By Id	Name of the person who attached the file.
Attached On	Date and time the file was attached.

You can add, delete, and edit the list:

- To add an attachment, select the New Attachment action. The Add/Edit Attachment dialog box appears. Enter the information about the file and click **Save**.
- To edit an attachment, select the entry in the list and then select the Edit action. The Add/Edit Attachment dialog box appears. The information for the selected file is shown. Make any changes and click **Save**.
- To delete an attachment, select the entry in the list and then select the Delete action. The Confirm Delete Attachment dialog box appears. Click **Ok**.

10. Open the Template Attachments page. This is a list of files attached to the template being used to create this project. For a description of the columns on this page, see Table 2–2. The same options are available to add, delete, and edit the list as provided on the Attachments page.
11. When you have made all your entries for the new project, select the Save action. The new project is added to the project hierarchy at the root level.

Adding a Project to an Existing Project

A project can be added under an existing project. To add a project, select the parent project in the left pane and then select the Add Project action. A tab opens to enable you to create the project. For information on completing this page, see "Creating a New Project." The new project is added to the project hierarchy under the selected parent project.

Adding an Activity and Schedule

To schedule or reschedule activities:

1. Select the projects and then select the Add Activity & Schedule action. The Add Activity dialog box opens.
2. Select the activities and then click **Ok**. The Schedule Activities dialog box opens.
3. Select the scheduling method. The following choices are available:
   - Forwards from the Start Date (with non-critical Activities Starting on same date)
   - Forwards from the Start Date (with non-critical Activities Ending on same date)

- Backwards from the end date (with non-critical Activities Starting on same date)
- Backwards from the end date (with non-critical Activities Ending on same date)
- Forwards from Last Completed Activity Date (with non-critical Activities Starting on same date)
- Forwards from Last Completed Activity Date (with non-critical Activities Ending on same date)

4. Click **Ok**. A Confirmation dialog box appears.
5. Click **Ok**. The selected activities are added to the projects. The system calculates the start and end dates for each activity.

Editing an Existing Project

Select the project and then select the Edit action. The project records open in edit mode. The following options are available:

- Adding Users
- Replacing a Team
- Adding Activities
- Removing Activities
- Moving a Project
- Adopting Information from a Parent Project
- Distributing Information from a Parent Project

Adding Users

If additional users are required for a project, you can add them. Open the Teams page. On the Teams page, select the Add Team action from the main actions menu. The Select Team dialog box opens. Select a team, click **Ok**, and then save the project:

- If you select a team that contains additional users to those users already in your project, these users are added to the relevant role within your project.
- If you add a team which does not contain roles used by your project, there is no effect on the project.
- If you add or remove a user, the user is added or removed from all the underlying activities of your project.

Replacing a Team

If a different set of users is required for a project, you can replace the team. Open the Teams page. On the Teams page, select the **Replace Team** action from the main actions menu. The Select Team dialog box opens. Select a team from the available teams, click **Ok**, and then save the project:

- All current users are replaced with the users specified by the selected team. However, current users assigned to user roles not contained within the selected team are retained.
- If you add or remove a user, the user is added or removed from all the underlying activities of the project.

Adding Activities

If additional activities are needed for a project, you can add them. Open the Activities page. From the Activities page, select the Add Activity action from the main actions menu. The Add Activity dialog box. Select the activities, click **Ok**, and then save the project.

Removing Activities

If activities are no longer required, you can remove them from a project. Only activities at Not Started status can be removed.

Open the Activities page. On the Activities page, select the activities to be removed and then select the Remove Activity action. Save the project.

Moving a Project

A project can be moved to a different parent project. To move a sub-project, open the sub-project in edit mode. Select the Change Parent Project action. The Select Parent Project dialog box appears. Select the new parent project, click **Ok**, and save the project.

Apart from the project name, the original data is retained. If you need to adopt information from the new parent, see "Adopting Information from a Parent Project."

Adopting Information from a Parent Project

You can replace project information for a sub-project from its parent project. Open the sub-project in edit mode. Select the Adopt Parent Information action and save the project. The following information is replaced from the parent project:

- Project Details:
  - Project Concept
  - Target Consumer
  - Proposed Products
  - Product Range Information
  - Packaging
  - Spec Type
  - Brand
  - Sub Brand
  - Business Category
- Project Schedule:
  - Proposed Launch Date
  - Proposed Year
  - Proposed Week (of period)

Distributing Information from a Parent Project

You can distribute information from a parent project to projects. To distribute the information, open the parent project in edit mode. Select the Distribute Parent Project. It will distribute the information to all projects that are one level down from the parent project. For the list of information that is distributed, see "Adopting Information from a Parent Project."

Adding and Removing Links to Records

The system allows activities (through setting an Activity Type) to be linked to a number of different records, which can be used to control the activity status, including the following:

- Sites
- Audits
- Scorecards
- Product Records
- Product Specifications

To link an activity to a record:

1. Open the activity in edit mode.
2. Select the Go to for the record. The record opens in edit mode.
3. Select the Link to Project action. The Create Activity Link dialog box appears. It lists the project title, activity name, and linked record name.
4. Click **Ok**.

To remove a link to an activity:

1. Open the Linked Records page.
2. Select the linked records in the list to be removed.
3. Select the Unlink action.

Changing Status of Multiple Projects

Users with the Project Manager or Project Administrator Authority Profile can select a number of projects in the view and then, either by right-clicking or by selecting a status from the Actions menu, change the status of the projects. A confirmation dialog must be accepted in order for the updates to be submitted.

Products Option

When you select this option, a tab opens with a default list view showing Products that have activities that meet the following requirements:

- The Project Type set to Product.
- The Project has activities that have not been completed.
- You have been assigned as being Responsible.
- The Project has not been cancelled or completed.

For each product, the following information is shown:

- Parent Project
- Project Title
- Project Type
- Proposed Start Date
- Actual Start Date
- Proposed End Date

- Proposed Launch Date

The following actions are available on this page:

- New Project: See "Creating a New Project."
- Add Project: See "Adding a Project to an Existing Project."
- Add Activity & Schedule: "Adding an Activity and Schedule."
- Edit: See "Editing an Existing Project."

Hierarchy Option

When you select this option, a tab opens with a three panel view showing a list of Projects in the left pane that meet the following requirements:

- You have been assigned as being either Responsible, Owner, or Viewer.
- The Project has activities that have not been completed.
- The Project has not been cancelled or completed.

For an example of this page, see Figure 2–5.

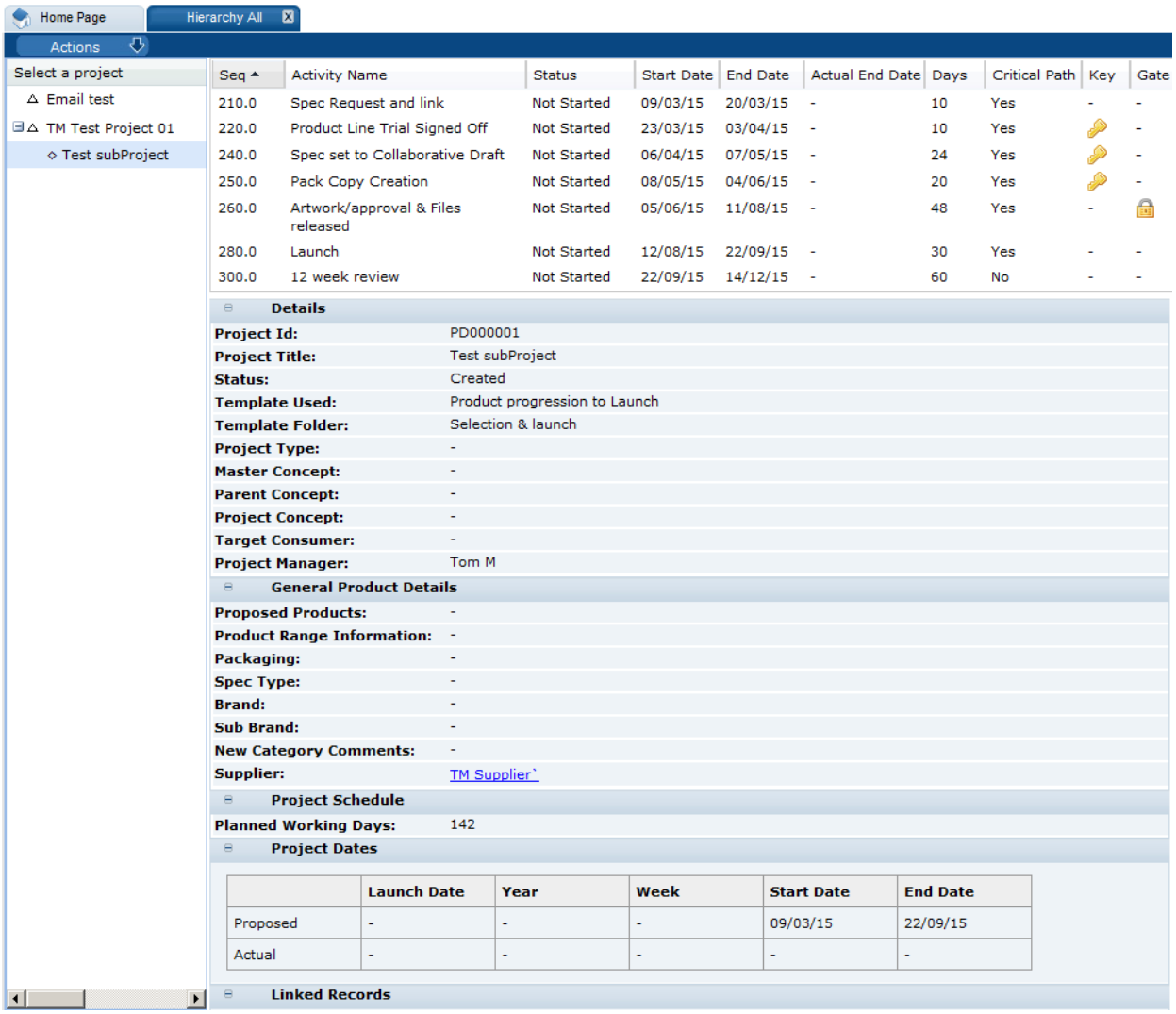
The following actions are available on this page:

- New Project: See "Creating a New Project."
- Add Project: See "Adding a Project to an Existing Project."
- Edit: See "Editing an Existing Project."

Hierarchy All Option

For Project Managers or Project Administrators, when you select this option, a tab opens with a three panel view showing all Projects. The left panel displays a hierarchial list of the projects. The top right panel shows the activities for the project selected in the left pane. The bottom right panel shows the project details.

Figure 2–5 Hierarchy All Page



The following actions are available on this page:

- New Project: See "Creating a New Project."
- Add Project: See "Adding a Project to an Existing Project."
- Edit: See "Editing an Existing Project."
- Copy a Project

Copying a Project

To copy a project:

1. Select the project in the left panel and select the Copy action. The Copy Project dialog box appears.
2. Enter the number of copies that are required. Click **Ok**. The dialog box is updated with a Project Title field for each copy.
3. Enter the titles and click **Ok**. A tab is opened for each new project.

4. For each new project, make updates as needed and then select the Save action. A new project is created at the same hierarchy level as the project being copied.

3

Supplier and Site Users

This chapter describes how the Project options are used by Supplier and Site users. For information on each option, see the following section:

- Activities Option
- Projects Option
- Products Option
- Hierarchy Option

For more information on the functionality of the options, see Chapter 2. Note that only Retailer users can create projects and templates.

Activities Option

To navigate to the activities you need to complete, you can select the Activities option on the Project menu. When you select this option, a tab opens with a list view of Activities that meet the following requirements:

- The External Role is set to Supplier Responsible.
- The supplier or site is named in the Project.

You can also select the Projects option on the Project menu and then open activities from the Activities page.

Projects Option

When you select this option, a tab opens with a list view of Projects that have activities that meet the following requirements:

- The External Role is set to Supplier Responsible.
- The supplier or site is named in the Project.
- The Project has not been cancelled or completed.

Products Option

When you select this option, a tab opens with a list view showing Products that have activities that meet the following requirements:

- The External Role is set to Supplier Responsible.
- The supplier or site is named in the Project.
- The Project has not been cancelled or completed.

Hierarchy Option

When you select this option, a tab opens with a three panel view showing Projects in the left pane that meet the following requirements:

- The Project has activities with the External Role set to Supplier Responsible or Supplier Viewer.
- The supplier or site is named in the Project.
- The Project has not been cancelled or completed.

4

All Users

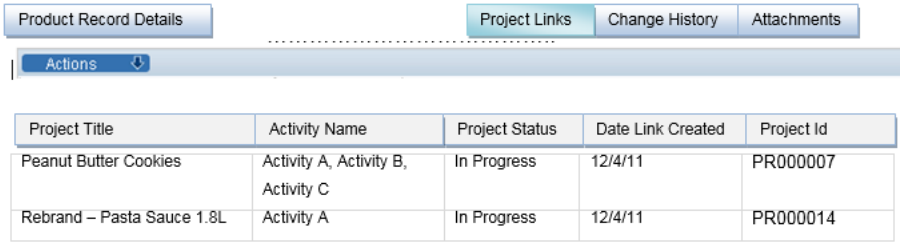
This chapter describes Project options available to all users. For information on each option, see the following section:

- Project Links
- Project Briefs

Project Links

Any records that a Project is linked to show the links in the Project Links page. Figure 4–1 shows an example of links to Projects within a Product Record.

Figure 4–1 Links to Projects within a Product Record



Project Title	Activity Name	Project Status	Date Link Created	Project Id
Peanut Butter Cookies	Activity A, Activity B, Activity C	In Progress	12/4/11	PR000007
Rebrand – Pasta Sauce 1.8L	Activity A	In Progress	12/4/11	PR000014

If a row shows a link with greyed-out text, clicking it will do nothing. If shown in black text, it can be double-clicked to open the Project record.

Project Briefs

Within Projects and Activities, the Brief Extract action can be used to produce an extract containing the questions used. The extract can be based on new or previously saved selection criteria. Previous selection criteria that is no longer required can be deleted. The extract is sent as an attachment in email.

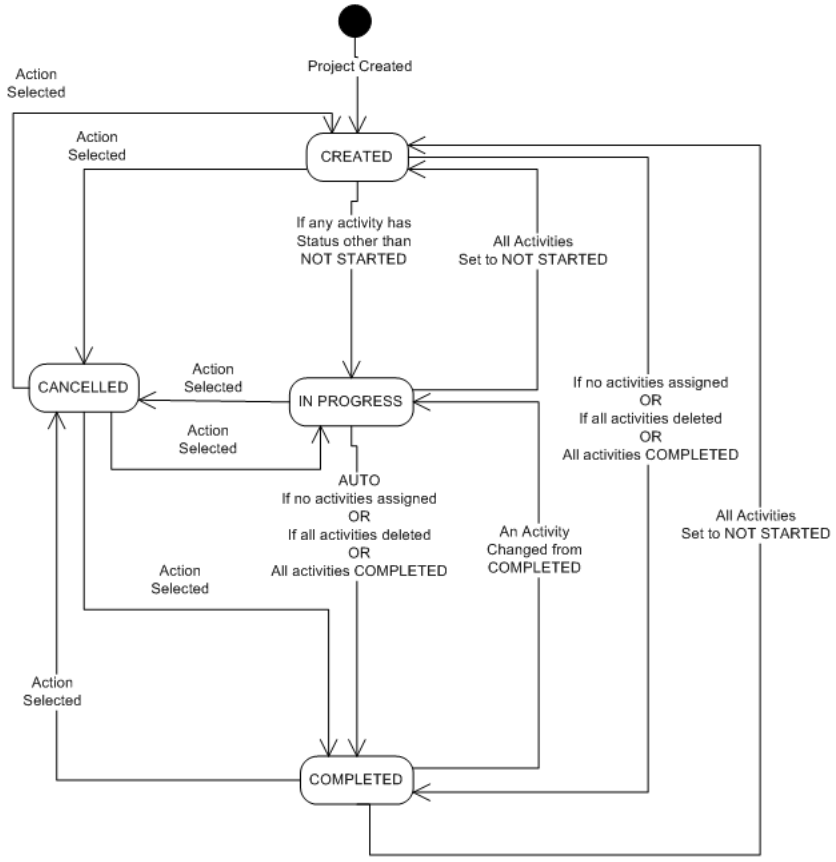
A

Appendix: Workflows

This appendix provides flow diagrams that illustrate how the status of projects and activities flows during the life of a project and activity.

Projects start in a Created status and move to Completed status.

Figure A–1 Project Status Workflow



Activities start in a Not Started status and move to Completed status.

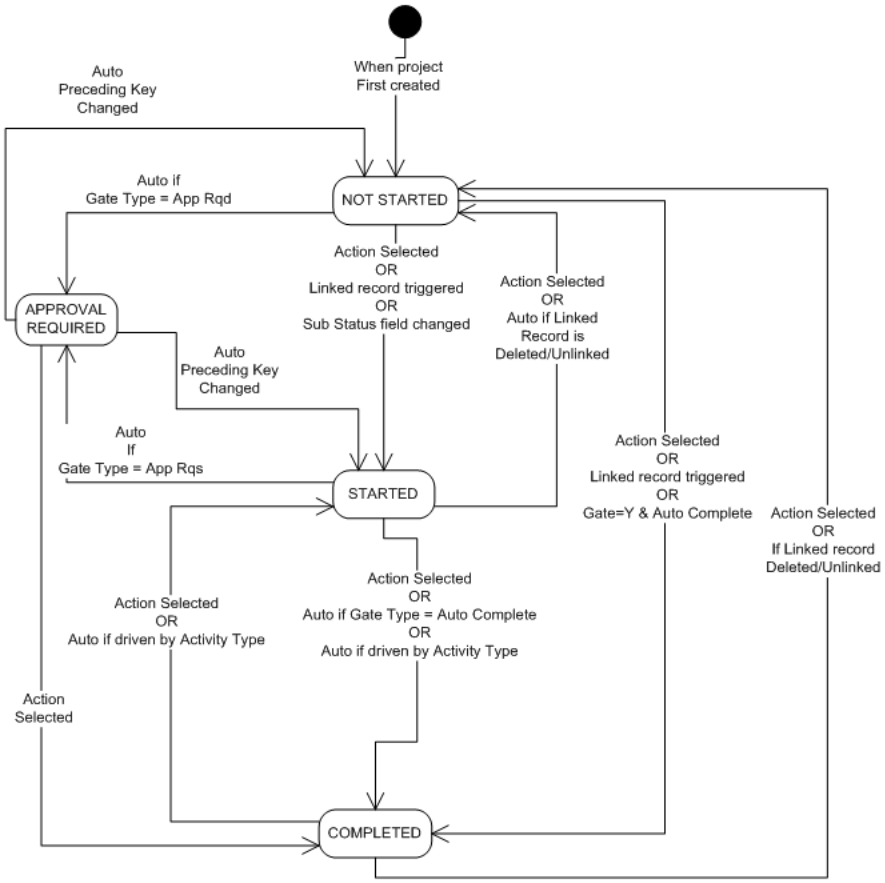



Figure A–2 Activity Status Workflow