

CA Clarity™ PPM

New Product Development Product Guide - On Premise

Service Pack 02.0.03



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Chapter 1: Release Notes: New Product Development (NPD) Accelerator

This section contains the following topics:

[NPD Accelerator Installation Requirements](#) (see page 9)

[NPD Accelerator Features](#) (see page 10)

[NPD Accelerator Known Issues](#) (see page 10)

[Documentation \(NPD Accelerator\)](#) (see page 10)

NPD Accelerator Installation Requirements

New CA Clarity PPM Customers

As a new customer, install CA Clarity PPM first. Then you can install the NPD Accelerator. See the *Installation Guide* for more information about how to install CA Clarity PPM and how to install an add-in.

Existing CA Clarity PPM Customers

As an existing customer, upgrade to the current CA Clarity PPM release before installing the NPD Accelerator. See the *Installation Guide* for more information about how to upgrade CA Clarity PPM and how to install an add-in.

NPD Accelerator Features

The NPD Accelerator feature set provides:

- Product portfolio management: Balance risks and rewards, improve alignment between innovation and business strategy, and monitor the health and performance of all products over their entire lifecycle.
- Pipeline management: Prioritize your projects and balance resource demand and capacity.
- Idea-to-launch management: Develop new products in an automated, collaborative workflow from the new idea stage to the product inception stage.
- Project and resource management: Take advantage of comprehensive project and resource management capabilities. Manage resource allocations, project schedules, and progress. Improve cross-functional coordination.
- NPD-specific dashboards and portlets: View a clear picture of your projects and products. Access, manage, and track your portfolios.

Note: The removal of old Portfolio features affected the NPD Accelerator. This add-in had portfolio-related portlets that were removed in CA Clarity PPM Release 13.2. The pages that displayed the portlets were left in place. The pages were left to accommodate customers who placed custom portlets or other valid portlets on the pages. If no custom or other portlets are present, the pages appear blank. Review your CA PPM Studio portlet pages and delete any that are empty.

NPD Accelerator Known Issues

Known issues are treated as Knowledge Base articles. To find NPD Accelerator known issues, go to CA Support Online at <http://support.ca.com>, click Support by Product, enter CA PPM, click Knowledge Base, and use the keywords *clarity13open* or *clarity14open*.

Documentation (NPD Accelerator)

This guide contains the following sections for managers who want to implement the automated workflows and methodology in the NPD Accelerator:

- A new Quick Start Guide.
- A product overview.
- Procedures and steps with descriptions of the primary fields and page elements.
- Descriptions of the dashboards and portlets.

Chapter 2: Quick Start Guide (NPD Accelerator)

This section contains the following topics:

[Workflow Steps \(NPD Accelerator\)](#) (see page 11)

[Access Rights \(NPD Accelerator\)](#) (see page 16)

Workflow Steps (NPD Accelerator)

The NPD Gate 1 Idea Review Process

The following roles are involved in the NPD Gate 1 Idea Review process:

- Idea Submitter: The user who enters the new idea.
- Process Manager: The user who oversees the idea review process and gate score management.
- Gatekeepers: The users who provide scores for the idea and the project.
- Project Manager: The user who manages the potential project that is derived from the idea.

Workflow Steps:

1. The idea submitter creates an idea and assigns a process manager and a project manager.
2. When the idea is ready, the idea submitter submits it for approval.
3. The Idea Review process starts when the idea is created. When the idea is submitted for approval, the process manager receives an action item to review the idea.
4. The process manager evaluates the benefits of the idea and decides to either continue the idea or kill it. A continued idea follows the idea screen steps or is fast-tracked.
5. To start the idea screen steps, set the following fields in the Gatekeepers section of the idea. If you do not define the Gatekeepers, the process manager receives an action item as a reminder.

Gatekeepers: Gate 1

The users who are assigned to provide a gate score to the project. This field is optional if a resource is assigned to the Gatekeepers: All Gates selection.

Gatekeepers: All Gates

The users who are assigned to provide a gate score to the project. This field is required if more than one gate approval step exists, or if no resources are assigned to the Gatekeepers: Gate 1 selection. The gatekeepers are carried over to the project and remain gatekeepers during later stages in the process.

6. To fast-track to project creation, select the Fast Track check box.
The project creation process starts which triggers the NPD Stage Gate Process.
7. The process manager selects one of the following options for the action item:
 - **Go.** If the Fast Track check box is not selected, the Idea Screen steps start. The idea passes through the Gate Score process before becoming a real project.
 - **Kill.** The idea status is set to *Rejected* and the idea submitter is notified. The Idea Review process restarts.

8. The Idea Review process creates a gate scoring for each gatekeeper. The gatekeepers receive an action item to score the idea through the gate scoring. All gatekeepers provide a score for each gate factor and select the Scoring Complete field when they finish evaluating the idea. The NPD Gate Score Process starts when the Scoring Complete field is checked. The Gate Score process locks all Gate Scoring fields, including the Gate Factors. The process also increments the score counter and sets the NPD Gate Trigger to the corresponding stage. In this case, stage one. The gatekeepers are not required to mark the action item done when the scoring is completed.
9. The process manager is notified when all gatekeepers finish scoring the idea. The process manager reviews the final Gate Score, which is the average calculated gate score from all gatekeepers. Based on the gate score recommendation, the process manager decides the following:
 - **Go.** The Idea Gate Score Factors are updated with the average of the Gate Score Factors provided by the gatekeepers. The idea status is set to “Approved”, the Gate Decision is set to *Go*, and the idea is converted to a project. The NPD Stage Gate Process starts.
 - **Hold.** The Idea Gate Score Factors are updated with the average of the Gate Score Factors provided by the gatekeepers. The idea status is set to “Rejected”, the Gate Decision is set to *Hold*, and the idea submitter is notified. The process restarts.
 - **Kill.** The Idea Gate Score Factors are updated with the average of the Gate Score Factors provided by the gatekeepers. The idea status is set to “Rejected”, the Gate Decision is set to *Kill*, and the idea submitter is notified. The process restarts.

The NPD Stage Gate Process

The following roles are involved in the NPD Stage Gate process:

- **Project Manager:** The user who is assigned to manage the potential project.
- **Gatekeepers:** The users who are assigned to provide scores to the project.
- **Project Stakeholder:** The user who is assigned to review the project and make the gate decision for each stage gate.

Workflow Steps:

1. After the project is created and the NPD Stage Gate process starts, the project manager receives an action item to create the project cost plan. The project manager must associate the project to an entity before creating financial plans. When setting up the cost plan, any combination of grouping attributes can be selected as long as it includes the User Value 2 grouping attribute. Each grouping attribute requires a default value that can be entered in the NPD Gate Processing section of the cost plan properties. This section becomes available when the cost plan is created. The User Value 2 does not require a default value. After creating the cost plan, the project manager can mark the action item as done.
2. The NPD Stage Gate process automatically creates a detail row in the cost plan for the Scoping stage with the information from the idea. The NPD Stage Gate process also updates the Project Gate Score Factors with the average of the Gate Score Factors provided by the gatekeepers in the originating idea. The Gatekeepers defined in the idea are copied to the project. The project manager can keep the same gatekeepers defined for the idea or modify them, selecting a gatekeeper for each stage gate, for instance.
3. The project manager performs the usual project management activities, such as, reviews the project plan, deliverables, financials, issues, and also defines the Finance and Governance stakeholder. The process will fail if the Finance and Governance stakeholder is not defined.
4. When the project activities are completed and the project is ready to advance to the next gate, the project manager marks the Go to Business Case milestone as completed. When the milestone is marked as completed the NPD Gate 2: Business Case Review sub-process starts. The NPD Stage Gate Process automatically creates a detail row in the cost plan for the Business Case stage.
5. The NPD Gate 2: Business Case Review process creates a gate scoring for each gatekeeper defined for Gate 2 and All Gates. The gatekeepers receive an action item to score the project gate through the gate scoring. All gatekeepers provide a score for each gate factor and select the Scoring Complete field when they finish evaluating the project gate. The NPD Gate Score Process starts when the Scoring Complete field is checked. The Gate Score process locks all Gate Scoring fields, including the Gate Factors, increments the score counter, and sets the NPD Gate Trigger to the corresponding stage. In this case, stage two. The gatekeepers do not need to mark the action item done when the scoring is completed.

6. The Finance and Governance stakeholder is notified when all gatekeepers finish scoring the project gate. Based on the gate score recommendation, the Finance and Governance stakeholder can decide the following:
 - **Go.** The Project Gate Score Factors are updated with the average of the Gate Score Factors provided by the gatekeepers, at the milestone and the project levels, and the Gate Decision is set to *Go*. The NPD Gate 2: Business Case Review process ends and the Business Case phase starts.
 - **Kill.** The Project Gate Score Factors are updated with the average of the Gate Score Factors provided by the gatekeepers, at the milestone and the project levels, and the Gate Decision is set to *Kill*. The project manager is notified and the sub-process restarts.
 - **Hold.** The Project Gate Score Factors are updated with the average of the Gate Score Factors provided by the gatekeepers, at the milestone and the project levels, and the Gate Decision is set to *Hold*. The project manager is notified and the sub-process restarts.
 - **Recycle.** The Project Gate Score Factors are updated with the average of the Gate Score Factors provided by the gatekeepers, at the milestone and the project levels, and the Gate Decision is set to *Recycle*. The project manager is notified and the sub-process restarts.
7. When the project activities are completed for the Business Case stage and the project is ready to advance to the next gate, the project manager marks the Go to Development milestone as completed. When the milestone is marked as completed the NPD Gate 3: Development sub-process starts. The NPD Stage Gate process automatically creates a detail row in the cost plan for the Development stage. The steps 5 and 6 described above are repeated.
8. When the project activities are completed for the Development stage and the project is ready to advance to the next gate, the project manager marks the Go to Testing and Validation milestone as completed. When the milestone is marked as completed the NPD Gate 4: Testing and Validation sub-process starts. The NPD Stage Gate process automatically creates a detail row in the cost plan for the Testing and Validation stage. The steps 5 and 6 described above are repeated.
9. When the project activities are completed for the Testing and Validation stage and the project is ready to advance to the next gate, the project manager marks the Go to Launch milestone as completed. When the milestone is marked as completed the NPD Gate 5: Launch Gate Review sub-process starts. The NPD Stage Gate process automatically creates a detail row in the cost plan for the Launch stage. Steps 5 and 6 repeat.
10. The NPD Stage Gate process ends when all five stages are completed.

Access Rights (NPD Accelerator)

The following rights are required by the NPD Stage Gate processes for each role. These are the minimum access rights required by the processes. The user groups included with the accelerator for NPD have examples of extra access rights that can be granted for each role. Global rights can be replaced by OBS Units rights depending upon the security implementation.

Idea Submitter

Idea submitters create and view ideas. The following access rights are required by the NPD Stage Gate processes.

Type	Area	Access Right
Global	General	<i>Account Settings - Navigate</i> <i>Organizer - Access</i>
	Idea Management	<i>Ideas – Create</i>
	Resource Management	<i>Resource - View - All</i>
Instance (Process - Start)	Process Management	<i>NPD Gate 1: Idea Review</i>

Process Manager

Process Managers edit ideas, gate scoring instances and manage processes. The following are the access rights required by the NPD Stage Gate processes.

Type	Area	Access Right
Global	General	<i>Account Settings - Navigate</i> <i>Organizer - Access</i>
	Idea Management	<i>Idea – Edit – All</i>
	Gate Score Management	<i>Gate Scoring – View All</i>
	Process Management	<i>Process View Instance – All</i>
	Resource Management	<i>Resource - View - All</i>
Instance (Portlet – View)	Gate Scoring	<i>Gate Score Review</i>

Type	Area	Access Right
Instance (Process - Cancel)	Process Management	<i>NPD Gate Score Process</i>
		<i>NPD Gate 1: Idea Review</i>
		<i>NPD Gate 2: Business Case Review</i>
		<i>NPD Gate 3: Development</i>
		<i>NPD Gate 4: Testing and Validation</i>
		<i>NPD Gate 6: Launch Gate Review</i>
		<i>NPD Stage Gate Process</i>
Instance (Process - Start)	Process Management	<i>NPD Gate Score Process</i>
		<i>NPD Gate 1: Idea Review</i>
		<i>NPD Gate 2: Business Case Review</i>
		<i>NPD Gate 3: Development</i>
		<i>NPD Gate 4: Testing and Validation</i>
		<i>NPD Gate 6: Launch Gate Review</i>
		<i>NPD Stage Gate Process</i>

Gatekeeper

Gatekeepers view ideas and edit gate scoring instances. The following are the access rights required by the NPD Stage Gate processes.

Type	Area	Access Right
Global	General	<i>Account Settings - Navigate</i>
		<i>Organizer - Access</i>
	Idea Management	<i>Idea – View – All</i>
	Gate Score Management	<i>Gate Scoring – View All</i>
Instance (Portlet – View)	Gate Score Management	<i>Gate Score Review</i>
Instance (Process - AutoStart)	Process Management	<i>NPD Gate Score Process</i>

Project Manager

Project Managers manage project properties, schedules, and resource allocations. The following are the access rights required by the NPD Stage Gate processes.

Type	Area	Access Right
------	------	--------------

Type	Area	Access Right
Global	General	<i>Account Settings - Navigate</i> <i>Organizer - Access</i>
	Idea Management	<i>Idea – View – All</i>
	Project Management	<i>Project – Cost Plan – Edit All</i> <i>Project – Create</i> <i>Project – Edit Management – All</i> <i>Project – Enable Financial</i> <i>Project – Modify Baseline All</i> <i>Project – Risk , Issue, Change Request – Edit – All</i> <i>Projects - Navigate</i>
	Process Management	<i>Process View Instance – All</i>
	Resource Management	<i>Resource - View - All</i>
Instance (Portlet – View)	Gate Score Management	<i>Gate Score Review</i>
Instance (Process - Cancel)	Process Management	<i>NPD Gate Score Process</i> <i>NPD Gate 1: Idea Review</i> <i>NPD Gate 2: Business Case Review</i> <i>NPD Gate 3: Development</i> <i>NPD Gate 4: Testing and Validation</i> <i>NPD Gate 6: Launch Gate Review</i> <i>NPD Stage Gate Process</i>
Instance (Process - Start)	Process Management	<i>NPD Gate Score Process</i> <i>NPD Gate 1: Idea Review</i> <i>NPD Gate 2: Business Case Review</i> <i>NPD Gate 3: Development</i> <i>NPD Gate 4: Testing and Validation</i> <i>NPD Gate 6: Launch Gate Review</i> <i>NPD Stage Gate Process</i>

Stakeholder

Stakeholders view projects and gate scoring instances. The following are the access rights required by the NPD Stage Gate processes.

Type	Area	Access Right
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Type	Area	Access Right
Global	General	<i>Account Settings - Navigate</i>
		<i>Organizer - Access</i>
	Gate Score Management	<i>Gate Scoring – View All</i>
	Project Management	<i>Project – View Management – All</i> <i>Projects - Navigate</i>

Chapter 3: Overview: New Product Development (NPD) Accelerator

This section contains the following topics:

[NPD Accelerator Capabilities](#) (see page 21)

[Pipeline Management \(NPD Accelerator\)](#) (see page 22)

[Portfolio Management \(NPD Accelerator\)](#) (see page 23)

[Idea-to-Launch Management \(NPD Accelerator\)](#) (see page 23)

[Project and Resource Management \(NPD Accelerator\)](#) (see page 24)

[User Access Groups \(NPD Accelerator\)](#) (see page 24)

NPD Accelerator Capabilities

The CA Clarity PPM Accelerator for New Product Development helps organizations shorten the time-to-market for new products. Use it to increase your rate of innovation, increase new product sales, and reduce new product development costs. Leverage the product development skills and resources at your organization for optimum strategic and financial impact across all product lines in all phases.

The Accelerator for New Product Development (NPD) add-in offers the following capabilities:

Portfolio Management

- Track specific product categories.
- Track the product or product type.
- Track products by brand, customer segment, and product line.
- Track competitor products.
- Move products through lifecycle phases.
- Analyze all products according to specific factors in a rating system.
- Manage a portfolio of products using the following convenience features:
 - a page layout for portfolios with product information.
 - a group that provides appropriate access for product managers.

Project Management and Stage Gates

- A gate scoring object to track and store all gate scores for each project stage.
- Automated gate submission processes that support each stage gate.
- A gate scoring page layout to provide metrics.
- Custom attributes and page layouts, including go, hold, and kill status.
- Project portlets that you can add to any of the project page layouts.
- Budget per phase.
- A built-in project template for the five-step stage-gate process.
- Support for deliverables and worksheets with a document folder structure.
- Project portfolio management including pipeline.
- Dashboards for executives, portfolio managers, and project managers to review projects before submitting them for gate approval.
- Separate user groups for portfolio managers, project managers, and team members.

Idea-to-Launch Management

- An idea vault to collect all ideas and facilitate your portfolio planning.
- An idea screening process that allows you to score the idea and turn it into a project.
- Custom attributes and page layouts for ideas.
- A gate scoring mechanism for gatekeepers to rate ideas against business goals.
- Enter new ideas, access idea scoring, and view pertinent projects.
- An Idea Management Dashboard that displays metrics and provides quick updates for users.
- A group that provides appropriate access to marketing managers.

Pipeline Management (NPD Accelerator)

The process of prioritizing and sequencing projects to balance resource demand and capacity is known as project portfolio management or pipeline management. As projects move from one stage in their lifecycle to the next, they require reviewing in the context of all the other in-flight projects, to determine if they are still worth doing. This is a portfolio process of selecting and scheduling.

Pipeline management offers the following advantages:

- Resource conflicts and overloads are avoided, thus reducing project delays
- Scarce resources can be allocated to the highest priority projects
- Pipeline throughput is improved by ensuring the right mix of projects at all phases of development

Portfolio Management (NPD Accelerator)

The purpose of portfolio management is to increase the business value of your product portfolio by accomplishing the following goals:

- Balance reward against risk
- Improve the alignment between innovation and business strategy by allocating NPD resources in a top-down approach
- Maximize the value of the product portfolio by monitoring the health and performance of all products over their entire lifecycle

Analyzing a product portfolio provides you with answers to the following questions:

- Do we have sufficient products in each stage of development?
- Do we have products in development for all of our target markets?
- Can we identify our core, competitive, strategic, and growth markets?
- What are the planned launch dates for each of the products in the portfolio?
- Do we have an appropriate balance of value against risk in the product portfolio?
- Are we over or under spending in any specific product or market area?
- Which of our products are at risk?
- Where do we have product gaps that we require to fill?
- Do we have sufficient high value products?
- Do we have too many low value products?

Idea-to-Launch Management (NPD Accelerator)

Idea-to-launch is the process of bringing new products from inception through to market. This process requires collaboration and coordination of multiple business functions including R&D, marketing, sales, finance, distribution, and the supply chain.

Employing an idea-to-launch process upholds the following capabilities:

- Support a rigorous go/kill decision process at funding gates
- Have well-defined stages that eliminate missed steps and rework
- Have standard deliverables for effective gate decisions
- Be adaptable to the scope and risk profile of the product being developed

Project and Resource Management (NPD Accelerator)

A key to improved project success is effective project and resource management. The Accelerator for New Product Development offers comprehensive project and resource management capabilities that allow your organization to achieve the following goals:

- Reduce resource bottlenecks by managing all resource allocations and assignments
- Minimize schedule delays by managing all project schedules and progress
- Help reduce project delays by capturing all issues and risks
- Enable early identification of cost overruns by capturing all project planned and actual costs
- Improve quality by providing standard templates for cross-functional project plans
- Reduce project delays by tracking dependencies between product and technology development projects
- Improve cross-functional coordination through program management of cross-functional plans

User Access Groups (NPD Accelerator)

Six CA Clarity PPM Accelerator for NPD user access groups exist, each with a different set of security rights. The groups are defined in the following ways:

- Non-Clarity Users - Users who do not require CA Clarity PPM to perform their jobs, but can enter ideas into the system.
- Team Members - Regular members of CA Clarity PPM Accelerator for NPD project teams.
- Marketing Managers - Users who perform marketing management activities.
- Project Portfolio Managers - Users who manage projects and portfolios of projects.
- Product Portfolio Managers - Users who manage the products, and the portfolios to which the products belong.
- Executives - Company executives who use CA Clarity PPM Accelerator for NPD to view project, product, and portfolio metrics dashboards.

Non-Clarity Users

Non-Clarity users are employees who do not use CA Clarity PPM on a daily basis to do their jobs. The access group enables them with permissions defined to show only ideas, gate scoring, and projects, with the [Idea Management Dashboard](#) (see page 72).

Team Members

Team Members are users who perform a variety of activities as members of NPD project teams.

Marketing Managers

Marketing Managers are the CA Clarity PPM Accelerator for NPD idea managers—the guardians of the idea review process. It is their responsibility to make the initial decision to send an idea through the scoring or fast track option. They review and submit ideas, utilize the [Idea Management Dashboard](#) (see page 72), enter planned costs and other idea data, and typically manage the overall idea process.

Project Portfolio Managers

Project Portfolio Managers create project portfolios and oversee projects. The managerial responsibilities cover a wide scope of activities, such as adding team members, creating the cost plan, reviewing planned and actual costs, editing and creating tasks, assigning and allocating resources, potentially approving timesheets, reviewing schedule variances, baselining the project, managing issues and risks, and adding dependencies. Project Portfolio Managers utilize the [Stage Review Dashboard](#) (see page 67) to determine that the project is on track.

Executives

The executive users use the [Executive Dashboard](#) (see page 51) to analyze portfolios and potentially gate scoring.

Chapter 4: Ideation (NPD Accelerator)

This section contains the following topics:

[Idea Management \(NPD Accelerator\)](#) (see page 27)

[Create and Submit an Idea for Approval](#) (see page 28)

[Evaluate an Idea](#) (see page 32)

[The Idea Vault](#) (see page 36)

[Scheduling Information](#) (see page 37)

[Budget Information](#) (see page 37)

[Financial Planning](#) (see page 37)

Idea Management (NPD Accelerator)

Ideation refers to the process of developing new ideas. New product development (NPD) begins with the submission of ideas for a company-configured approval process. Input from sales, marketing, customers, partners, and other employees is often spread across the organization in numerous databases, email in-boxes, and documents. Anybody in your organization can create and submit an idea including external Non-Clarity Users (see definition on page 25).

For proper resource and budget planning, all the ideas require reviewing and weighing against the company goals. Only then, take decisions regarding the ideas to implement. CA Clarity PPM Accelerator for NPD provides an idea management dashboard that is designed for the marketing and product managers in your organization. A subset of that dashboard is available for other users as a landing point for them to enter ideas. Portlets track idea metrics, including costs and revenues. CA Clarity PPM Accelerator for NPD also provides an Idea Vault, which is a page that contains all ideas, whether approved or not. Filter the ideas by status and stage. Look for older ideas that are on hold or recycled and then start the approval process.

Note: Much of your work is performed from the Idea Management Dashboard. You can set the dashboard as your default CA Clarity PPM Accelerator for NPD home page. Action items can be accessed and managed directly from the page.

Create and Submit an Idea for Approval

Once an idea is submitted for approval, the process manager sends an automatic notification to review it.

Follow these steps:

1. Open the New Product Development menu, and click Idea Management Dashboard.
The overview page appears.
2. In the Ideas section, click New.
The create page appears.
3. Complete the following required fields in the General section:

Subject

Indicates the name of the idea.

Idea ID

Indicates a unique identifier for the idea. Enter an alphanumeric string of characters.

Idea Priority

Indicates a classification for the issue. Select a category from the drop-down list.

- High
- Low
- Medium

Description

(optional) A description of the idea.

Project Manager

The user assigned to manage the potential project, once it is created.

Idea Submitter

The user who entered the new idea.

Process Manager

The user assigned to oversee the idea review process and gate score management.

Stage

The default selection is Idea Screen. Click the lookup icon to browse for a company-defined stage for the project (optional). The following are the out-of-the-box NPD lookup values:

New Product Development (Level = Investment Process)

- Idea Screen (Level: Investment Stage)
- Scoping (Level: Investment Stage)
- Business Case (Level: Investment Stage)
- Development (Level: Investment Stage)
- Testing and Validation (Level: Investment Stage)
- Launch (Level: Investment Stage)

Active

(optional) The box is checked as Active by default.

Idea Documentation

(optional) Click the multiselect browse icon to add related files to the idea.

4. Complete the following fields in the Idea Details section (optional). These details are used in many portlets and require filling based on the business configurations. You can customize the lookup tables to include your own values:

Product Category

The category is used to label the product with the appropriate description as it relates to marketing. Select a category from the drop-down list.

New to World (Class: Breakthrough, market changing products)

These products have the most potential for huge company changing revenues, but they also carry the most risk. The technology to create the product may not exist, and may ultimately not be feasible.

New to the Company (Class: Company changing)

These products are not that your company has built, but competitors have built them. The technology exists, but may not exist in-house. These are risky, but not as risky as New to the World products. Since they have the potential for new product lines, they also have great revenue increasing capability.

Line Extension (Class: Safest)

Extensions to existing product lines. These products are low risk, low reward projects.

Modification (Class: Safe)

Modifications to existing product lines. A new product is developed, but about more of the same. Low risk, low reward, low innovation.

Enhancement (Class: Safe)

Minor additions to existing features in products. A new product is developed, but without new features. Low risk, low reward, low innovation.

Product Line

The product line is a set of values that your organization specifies, based on its own manufactured products. The lookup list is populated with out-of-the-box sample values.

Product Type

The type is used to track the product type using the following choices:

- Platform
- Technical Development
- Product

Brand

The product line delineates where the product fits from a manufacturing perspective and the brand name is used for marketing purposes. The attributes are necessary for tracking of product information and are used extensively in the portfolio management dashboard. The lookup list is populated with out-of-the-box sample values.

Customer Market

The geographical region of the customer market.

- AsiaPac
- EMEA
- North America
- South America
- Global

Customer Segment

Describes the part of the new or existing customer base that the product addresses.

- Business
- Consumer

5. (Optional) Complete the fields in the Estimated Costs and Revenues section.

Note: See the *Demand Management User Guide* for more information.

Estimate Type

Defines the type of estimate benefits, cost, and revenue impact for the idea.

Currency Code

Defines the system currency. If **Use Multi-Currency** is enabled, a drop-down list of all active currency codes appears. During the conversion process, the currency code is the currency code for the investment.

Business Unit

Defines the business unit associated with the idea.

Revenue Description

A brief description of the revenue from the investment.

Estimated Cost

Defines the estimated total cost of the idea. During the conversion process, the estimated cost is the investment planned cost.

Estimated Benefit

Defines the estimated total financial benefit of the idea both in term of revenue and money saved.

Estimated Start Date

Indicates the estimated start date for the idea. The date must be on or before the estimated finish date.

Estimated Finish Date

Indicates the estimated finish date for the idea. The date must be on or before the estimated finish date.

Breakeven Date

Defines the estimated break-even date for the idea. During the conversion process, the break-even date is the budget break-even date for the investment.

6. Save and submit for approval.

Idea Screening

After preliminary research on a submitted idea is complete using the idea approval steps, the process manager can develop the idea as a project. Although ultimately responsible for the final decision in the system, the process manager collaborates with other stakeholders. A committee of team members reviews the idea, provides counsel, and decides the feasibility of the idea.

Only the ideas that pass through the Idea Gate Review page can become real projects.

The Idea Gate Review page is tied to a review process that is initiated once the marketing manager submits the idea for gate scoring. An action item is sent to the process manager who acts as the decision maker for idea approval. The choices are Go or Kill.

After an idea is submitted, the process manager reviews it and decides about further investigating. If so, they launch the Idea Gate Review page. The process can involve many teams to estimate or further explore the idea. Screening culminates in a gate scoring review, where the team decides to proceed with or to kill the idea.

This sub process notifies each of the listed gatekeepers on the idea through action items. They are reminded to log in and score the idea against specific factors that are related to company goals. Once scoring is completed, the process manager makes a final decision to go, kill, or hold the idea. Define the gatekeepers when the idea is first created.

If the idea is a Go, a project is automatically created and the gate score appears on the Idea Gate Review page. The gate score is automatically calculated based on the average of all gatekeeper entries.

All ideas with a Kill or Hold status are moved into the Idea Vault and can be resurrected later as business goals shift.

Evaluate an Idea

When an idea is submitted for approval, the process manager receives an action item to evaluate it. After this evaluation, the process manager determines whether the idea warrants further consideration or not.

Depending on your role, view and evaluate the idea from one or more of the NPD dashboards that display action items: the Idea Management Dashboard, the Portfolio Management Dashboard, and the Executive Dashboard.

Follow these steps:

1. Log in to CA Clarity PPM Accelerator for NPD.

The overview page appears.

Note: If you change your default home page to a specific dashboard, the specified page appears instead of the overview page.

2. Open the Action Items menu and click the Idea Review action item.

The action item details page appears.

3. In the Object Links section, click the idea link in the Objects field.

The properties page appears.

4. Review and evaluate the data. You can add additional details.
5. Save the changes.

After completing the evaluation, the process manager continues developing the idea in the NPD process or kills it.

You can choose from the following options:

- [Prepare the idea for gate scoring](#) (see page 33)
- [Score the idea](#) (see page 34)
- [Fast track the idea](#) (see page 36)
- [Cancel the idea](#) (see page 36)

Prepare an Idea for Gate Scoring

1. Open the idea properties page and click Idea Gate Review.

The idea gate review page appears.

2. Complete the following fields in the Gatekeepers section:

Gatekeepers - Gate 1

The users assigned to provide a gate score to the project. This field is optional if a resource is assigned to the Gatekeepers - All Gates selection.

Gatekeepers - All Gates

The users assigned to provide a gate score to the project. This field is required if more than one gate approval step exists, or if no resources are assigned to the Gatekeepers - Gate 1 selection. The gatekeepers are carried over to the project and remain gatekeepers during later stages in the process.

3. Save the changes.
The filter page appears.
4. Open the New Product Development menu, and click Idea Management Dashboard.
5. Click on the action item in the My Action Items section.
6. Select Go from the Status drop-down list.
7. Save the changes.

Your action item closes and the idea is now listed in the Idea Gate Review section of the overview page of idea management dashboard. The status is Running. Additionally, creates a Gate Score action item for the gatekeepers assigned to the project.

Score an Idea

To score an idea, rate a series of factors. Each factor is assigned a number and the average is used to calculate your score and the average gate score from all gatekeepers. The values and lookups attached to these factors can be customized to suit your company needs and policies. Once you submit the scores, they cannot be edited.

Once you begin scoring, you can save to see the stoplight icon calculations assigned to each selected value.

- Green (best)
- Blue
- Yellow
- Red (worst)

Additionally, the average score displays in the Gate Score field.

Follow these steps:

1. Open the Executive Dashboard, or the Portfolio Management Dashboard.
2. In the Gate Review portlet, locate the project, and click the corresponding Properties icon.

The properties page appears.

3. Complete the following fields in the Gate Factors section:

Strategic Fit and Importance

- Not Aligned
- Somewhat
- Supports
- Aligns Very Well

Product & Competitive Advantage

- Limited
- Modest
- Positive
- Significant

Market Attractiveness

- Small
- Modest
- Significant
- Large

Reward to Company

- Poor Reward
- Modest
- Good
- Excellent

Synergies - Leverage Core Competencies

- No Opportunity
- Some Opportunity
- Considerable Opportunity
- Excellent Opportunity

Technical Feasibility

- Not Feasible
- Limited Feasibility
- Good Likelihood of Feasibility
- Excellent Feasibility

4. Save the changes. You can leave the gate scoring process and return to it at another time. The scores are saved, allowing you to change them, or continue scoring the remaining factors.
5. Select the Scoring Complete check box.
6. Submit the changes.

Fast Track an Idea

You can evaluate an idea and set it to expedite through the NPD process. You can skip the gate scoring steps and convert it to a project immediately.

Follow these steps:

1. Complete steps 1 through 4 of the [evaluation process](#) (see page 32).
2. In the General section, select the Fast Track check box.
3. Save the changes.
The properties page appears.
4. Open the New Product Development menu, and click Idea Management Dashboard.
5. Click on the action item in the My Action Items section.
6. Select Go from the Status drop-down list.
7. Save the changes.

Your action item closes and the idea is now listed in the Idea Processes section of the overview page of idea management dashboard. The Stage is set to Idea Screen and the idea is converted to a project.

Kill an Idea

1. Complete steps 1 through 4 of the [evaluation process](#) (see page 32).
2. Click Cancel.
3. Open the New Product Development menu, and click Idea Management Dashboard.
4. Click on the action item in the My Action Items section.
5. Select Kill from the Status drop-down list.
6. Save the changes.

Your action item closes and the idea is now listed in the Idea Processes section of the overview page of idea management dashboard. The status is Done. The idea also appears in the [Idea Vault](#) (see page 36) with a Kill gate decision for future resubmission for approval.

The Idea Vault

The Idea Vault page displays all of the ideas entered into CA Clarity PPM Accelerator for NPD, such as the ideas converted into projects.

For further details on the page, refer to [Idea Vault](#) (see page 72).

Scheduling Information

Use the schedule page of idea properties to define the idea start and finish dates, to open it for time entry, and to define its charge code.

Note: See the *Demand Management User Guide* for more information.

After defining the scheduling information, enter the budget information.

Budget Information

The idea budget data is essential in managing and analyzing idea portfolios. Correctly defining and recording the idea planned cost and benefit information is key to accurately assessing and analyzing ideas during portfolio management.

Budget information is defined using the budget page of idea properties.

Note: See the *Demand Management User Guide* for more information.

Financial Planning

The project budget is awarded incrementally. As each stage of the project is completed, the team gains approval to commence to the next stage. This approval involves obtaining the requested budget dollars. CA Clarity PPM Accelerator for NPD uses cost plans and creates a detail row with the information entered on the gate information page once the project receives approval to move on to the next gate.

This means, a cost plan exist for each project with multiple detail rows: one for each stage. Reporting can be for the current stage or for the entire project, depending on the view. All the existing views and portlets continue to use the cumulative totals for planned costs and actuals, with the planned cost increasing with each stage that the project enters.

The project manager distributes the budget amount across the fiscal time periods, based on when the project uses the monies. A Create Cost Plan action item is automatically sent to the project manager on submitting an idea for the final gate approval.

Chapter 5: Managing the Project Pipeline (NPD Accelerator)

The NPD Project Master Portfolio supports the NPD metrics for projects. The Portfolio Management Dashboard includes portlets to assist with future project planning and reviewing of costs and revenues.

For further details on the dashboard, refer to [Portfolio Management Dashboard](#) (see page 59).

This section contains the following topics:

[Automatic Project Creation](#) (see page 39)

[NPD Gate Process](#) (see page 40)

[Document Folder Structure](#) (see page 41)

[NPD Cost Plans](#) (see page 42)

Automatic Project Creation

Once you provide idea gate approval, CA Clarity PPM Accelerator for NPD automatically performs the following actions:

- Converts the idea to a fully configured project plan that adds the following capabilities to the project:
 - A folder structure for documents
 - The work breakdown schedule (WBS) consisting of five automated stages and gates
 - Gate review
 - Product alignment
- All the fields on the idea having corresponding fields on the project are copied.
- The project process can be running.
- The first two stages of the NPD investment process (Idea Capture and Scoping) are marked as complete.

For more information, see the *Project Management User Guide*.

Project Stages

Stages are defined as phases in CA Clarity PPM Accelerator for NPD. Stages are where the following activities occur:

- Work is done. Activities are completed to advance the project to the next gate.
- Cross-functional teams collaborate. For example, no R&D or marketing stage exists. Activities are worked in parallel to accelerate the process.
- Risk is managed. Vital information is gathered to manage risk. For example, technical, market, financial, or operations.
- Incremental budgeting is managed. Each stage costs more than the preceding one resulting in incremental commitments. As uncertainties decrease, expenditures are allowed to rise and risk is managed.
- The process manager reviews the project plan, deliverables, financials, and issues in preparation for the gate review team analysis. This process is formalized in CA Clarity PPM Accelerator for NPD as the Stage Review.

For further details on the Stage Review portlet, refer to [Stage Review](#) (see page 67).

Gates

Gates are defined as milestones in CA Clarity PPM Accelerator for NPD. Gates are where the following activities occur:

- Go/Kill and prioritization decisions are made.
- Any mediocre projects are culled out and resources are allocated to the best projects.
- Focus is placed on three key issues: quality of execution; business rationale; and the quality of the action plan.
- Gatekeepers use scorecards and criteria to evaluate the project potential for success. The process is formalized in CA Clarity PPM Accelerator for NPD as the gate review.

NPD Gate Process

Once a stage is complete, you are ready for the gate.

The standard gate process has five stages:

- Scoping
- Business Case

- Development
- Testing and Validation
- Launch

The high-level WBS structure is as follows:

Stage (Phase)	Gate (Milestone)
Idea Capture	Go to Scoping
Scoping	Go to Business Case
Business Case	Go to Development
Development	Go to Testing and Validation
Testing and Validation	Go to Launch
Launch	Post Launch Review

CA Clarity PPM Accelerator for NPD includes one built-in project template to support the five stages.

Document Folder Structure

For each gate, create and review specific documents. CA Clarity PPM Accelerator for NPD includes a preconfigured set of folders in the project document manager. The folders are stored on the project and available to team members.

- General Project Administration
 - Correspondence
 - Meeting Notes
 - Preliminary Specifications
 - Project Reviews
 - Technical Reports
- Stage 1 - Scoping*
 - Deliverables
 - Gate Information
 - Worksheets
- Stage 2 - Business Case
- Stage 3 - Development

- Stage 4 - Test and Validate
- Stage 5 - Launch

*Each of the five stage folders has the three subfolders that are listed under Scoping.

NPD Cost Plans

Once the project receives approval to move on to the next gate, CA Clarity PPM Accelerator for NPD uses cost plans and creates a detail row with the information entered on the budget page.

Note: When you create the cost plan, include User Value 2 as one of items in the plan and provide a default value. In addition, provide default values for all items you include in the plan. Enter the default values in the NPD Gate Processing section of the cost plan properties.

Once the final gate approval is submitted, the project manager receives an action item to create the cost plan, marks the Create Cost Plan action item as Done. CA Clarity PPM Accelerator for NPD automatically then creates a scoping detail row and uses the budget information from the idea for the scoping change over the fiscal time periods that comprise that stage.

Once the cost plan is in place, as the project moves through the stages, CA Clarity PPM Accelerator for NPD automatically assigns a detail row for the next stage. This also includes a budget amount displayed in the first time period. The project manager distributes the budget amount across the fiscal time periods based on when the project uses the monies.

This means, one cost plan exists for every project with multiple detail rows: one for each stage. Reporting can be for the current stage or for the entire project, depending on the view. All existing views and portlets will continue to use the cumulative totals for planned costs and actuals, with the planned cost increasing with each stage that the project enters. CA Clarity PPM Accelerator for NPD supplies out-of-the-box defined codes for the detail rows.

For more information, see the *Financial Management User Guide*.

Chapter 6: Managing the NPD Product Portfolio

The NPD Product Master Portfolio supports the NPD metrics for products. The Portfolio Products Dashboard includes portlets to assist with future project planning and reviewing of costs and revenues.

For more information about this dashboard, see [Product Master Portfolio Page Layout](#) (see page 80).

This section contains the following topics:

[NPD Products](#) (see page 43)

[Product Specific Attributes](#) (see page 44)

[Product Analysis](#) (see page 45)

[Competitor Product Tracking](#) (see page 47)

NPD Products

CA Clarity PPM Accelerator for NPD products include pertinent attributes related to marketing and the launching of your products. The attributes simplifies tracking your products based on how they are built and launched.

Products pass through five stages:

- Development
- Introduction
- Growth
- Maturity
- Decline

Cost and revenues are tracked using existing CA Clarity PPM functionality. Product managers can track groups of products according to product line and brand, and can be built with the portfolio power filter.

The [Product Master Portfolio Page Layout](#) (see page 80) provides a number of comparison portlets that allow you to compare your current plan of record with different scenarios. Competitor information can be tracked for products and used to create competitor portfolios for use in product planning.

Product Specific Attributes

Once a project is nearing completion (or even during the creation process), a new product is created in CA Clarity PPM. Depending on your organization, you can track portfolios of products based on several factors. Ensure a balance between value and risk and understand how many products fall into each category.

You can build portfolios using different attributes such as brand or product line, based on existing CA Clarity PPM functionality for power filters. The following attributes are necessary for tracking of product information and are used extensively in the product portfolio dashboards.

CA Clarity PPM Accelerator for NPD includes the following product attributes:

Product Categories

Used to label the product with the appropriate description as it relates to marketing.

Values:

- New to World
- New to Company
- Line Extension
- Modification

Product Type

Used to track the product type:

- Platform
- Technical Development
- Product

Customer Segment

Defines the part of the customer base or of new customers this product address.

Values:

- Business
- Consumer

Product Line

Defines the set of values that your organization specifies based on your manufactured products.

Values:

- Gadgets
- Other
- Widgets
- Wingdings

Brand

Defines where the product line delineates and the product fits from a manufacturing perspective, the brand name is used for marketing purposes. CA Clarity PPM Accelerator for NPD includes a user-defined lookup to store company brand names.

Product Analysis

CA Clarity PPM Accelerator for NPD provides a set of factors to help you determine four key marketing tenets:

- Market Attractiveness
- Competitive Position
- Technical Capability
- Customer Value Perception

These four areas are scored using a simple stoplight calculation. Each of the values are linked to a specific number which drives a green, yellow, or red stoplight display.

The product properties page includes Product Analysis that provides a section for each of the four market areas. To view the product properties page, click Products in the Portfolio Management menu. Select the product to view and click product analysis.

To rate Market Attractiveness, the following questions are available:

- Market Growth Projections
 - High Growth
 - Moderate Growth
 - Low Growth

- Product Price Protection
 - High Price Protection
 - Downward Moderate Price Trend
 - Significant Downward Price Pressure
- Product Extension Leverage
 - Significant Opportunity for Product Extensions
 - Moderate Opportunity for Product Extensions
 - Limited Extension Capability

To rate Competitive Position, the following questions are available:

- Competitive Position
 - Dominant Position
 - Top Tier Position
 - Market Trailing Position
- Competitive Trend
 - Competition Declining
 - Competition Stable
 - Competition Increasing

To rate Technical Capability, the following questions are available:

- Technical Synergy
 - Known Technology with Expertise In-House
 - Known Technology with Expertise Available
 - Unknown Technology
- Technical Delivery
 - Existing Delivery Environment In-House
 - Existing Delivery Environment Available
 - Delivery Environment Unavailable

To rate Customer Value Perception, the following questions are available:

- Customer Price Perception
 - Premium Price
 - Premium Price at Risk of Commodity Pricing
 - Commodity Pricing

- Product Perceived Value
 - New Perceived Benefit
 - New Usage of Product
 - No Change from Existing Products

Competitor Product Tracking

To get a complete picture of the market landscape, track your competition. Gather information about competitive products and store that to use for comparison against your own products and product plans. CA Clarity PPM Accelerator for NPD allows you to input your competitors and track their products.

The Product Properties page has a checkbox that indicates that the product is a competitor product. The flag is used in all portlets and reports to differentiate between competitor and company-owned products.

To view the Product Properties page, click Products in the Portfolio Management menu, and select the product to view.

Chapter 7: NPD Accelerator Dashboards and Portlets

This section contains the following topics:

[Gate Scoring \(NPD Accelerator\)](#) (see page 49)

[Executive Dashboard \(NPD Accelerator\)](#) (see page 51)

[Portfolio Management Dashboard \(NPD Accelerator\)](#) (see page 59)

[Idea Management Dashboard Overview \(NPD Accelerator\)](#) (see page 64)

[Stage Review \(NPD Accelerator\)](#) (see page 67)

[Portfolio Master Page Layouts \(NPD Accelerator\)](#) (see page 80)

Gate Scoring (NPD Accelerator)

The Gate Scoring dashboard is built for product managers and marketing managers to view the gate scores for all ideas and projects in one location.

Gate Scoring List

The Gate Scoring List is a snapshot portlet designed to show metrics for projects or ideas.

The following columns are displayed on this portlet:

Gatekeeper

Defines the name of the gatekeeper. Click the name to open the resource properties page.

Properties Icon

Click the icon to view the gate scoring properties page.

Project or Idea

Defines the name of the idea or project. Click the name to open the idea or project properties page.

Stage

Defines the current stage of the idea or project.

Score Date

Defines the date when the gate score was completed.

Gate Score

Defines the stoplight icon and gate score number (from the project or idea gate score field).

Potential Market Gain

The standard stoplight.

- Green = Large
- Blue = Significant
- Yellow = Modest
- Red = Small

Product & Competitive Advantage

- Limited
- Modest
- Positive
- Significant

Reward to Company

- Poor Reward
- Modest
- Good
- Excellent

Strategic Fit and Importance

- Not Aligned
- Somewhat
- Supports
- Aligns Very Well

Synergies - Leverage Core Competencies

- No Opportunity
- Some Opportunity
- Considerable Opportunity
- Excellent Opportunity

Technical Feasibility

- Not Feasible
- Limited Feasibility
- Good Likelihood of Feasibility
- Excellent Feasibility

Market Attractiveness

- Small
- Modest
- Significant
- Large

The following portlet filters are available:

Gatekeeper(s)

Click the browse icon to filter by resources assigned as gatekeepers.

Gate Score

Enter a range to filter by the gate score.

Project or Idea

Click the browse icon to filter by project or idea.

Stage

Click the browse icon to filter by stage.

Executive Dashboard (NPD Accelerator)

The Executive Dashboard is built for individuals having a view across all projects, products, and their respective portfolios. The dashboard has five tabs, each containing portlets for R & D, Launch, and Brand tracking. The Roadmap page is a critical page, which shows the stage of products in their product lifecycle for executives to plan for the future.

Executive Dashboard Overview

The Overview page contains three portlets that provide general information for an executive.

- Gate Review
- Project Update

- My Action Items

To view the portlets, click Executive Dashboard in the New Product Development menu. The overview page displays.

Gate Review

The Gate Review portlet shows all the submitted ideas and active projects currently moving through the gating process. For ideas, this process is the idea screen process before an idea is converted to a project. For projects, the gating process runs throughout the life of the project. As each gating milestone is completed, the project goes through a gate review for approval to move on to the next stage. The Gate Review portlet provides you with insight into the number of ideas and projects going through approval processes.

The following columns are displayed on the portlet:

Gatekeeper

The name of the gatekeeper. Click on the name to drill down to the resource properties page.

Properties Icon

Click on the icon to view the gate scoring properties page.

Project or Idea

The name of the idea or project. Click the name to drill down to the idea or project properties page.

Stage

The current stage of the idea or project.

Score Date

The date when the gate score was completed.

Gate Score

The stoplight icon and gate score number (from the project or idea gate score field).

The following portlet filters are available:

Gatekeeper

Click the browse icon to filter by resources assigned as gatekeepers.

Investment

Click the browse icon to filter by investment.

Project Update

The Project Update portlet lets you filter to display a specific set of projects. The portlet shows the main metrics about gate scores, decisions, and cost and revenue information. By default, the portlet is sorted with red flag projects at the top.

The following columns are displayed on the portlet:

Project

The name of the project. Click on the name to drill down to the project properties page.

Properties icon

Click on the icon to drill down to the project hierarchy page.

Gate Score

The stoplight icon and gate score number (from the project or idea gate score field).

Gate Decision

The current gate decision represented by a colored, directional arrow.

- Green = Go
- Yellow = Hold
- Red = Kill

Red Flag

The red flag Boolean on the project.

Stage

The current stage of the project.

Customer Market

The customer market selection on the project.

Product Category

The selected product category on the project.

Ranking

An attribute on the project that allows selection of a number from 1 to 10 to rank projects from most to least important.

Planned Revenue

Total planned revenue for the project.

Planned Cost

Total planned cost for the project.

Actual Cost

Total actual cost for the project.

Remaining Cost

The difference between actual cost and planned cost.

Planned NPV

NPV percentage from the project.

Planned ROI

ROI percentage from the project.

The following portlet filters are available:

Product Category

Select a category from the drop-down list.

Product Line

Select a product line from the drop-down list.

Gate Decision

Select a gate decision from the drop-down list.

Brand

Select a product brand from the drop-down list.

Customer Market

Select a customer market from the drop-down list.

Customer Segment

Select a customer market from the drop-down list.

My Action Items

My Action Items portlet displays all the notifications and scheduled action items that a marketing, process, or product manager receives.

The following columns are displayed on the portlet:

Action Item

The name of the action item. Click on the action item to drill down to the action item details page.

Priority

Based on high, medium, or low priority with corresponding red, yellow, or green stoplights.

Status

Displays the status.

Values: Open, Closed, Deferred, Done, and In Progress

Date Received

The date that the action item is assigned to the user.

Process Icon

Click on the icon to drill down to the process diagram page.

The following portlet filter is available:

Status

Select an action item status from the drop-down list.

Brand Dashboard

The Brand Dashboard page contains the Product Line Rating portlet that provides general information for executive or senior managers.

Product Line Rating

The Product Line Rating portlet helps to determine how each product area is doing. The bubble chart displays the aggregate of all the products based on their category. The chart compares the metrics for the competition rating on the X-axis and the Product Potential Gain on the Y-axis.

The legend lists each of the following attributes with the colors:

X-Axis

Competition Rating - The attribute of the same name on the product.

Y-Axis

Product Potential Gain - The attribute of the same name on the product.

Bubble Color

The bubble color represents the product category.

- Red = Line Extension
- Green = New to Company
- Blue = Modifications
- Purple = New to World

Bubble Size

Average Market Share - A percentage attribute from the product. The percentage is derived from adding and averaging the products in the specific product category.

The following portlet filter is available:

Product Category

The product category from the portfolio.

Roadmap Tab

The Roadmap page contains the Roadmap portlet that provides an executive view of future and current projects. You can view groups of projects and products to determine the direction for various product lines. Road mapping refers to that capability. The Roadmap portlet provides the metrics for executives and analysts to plan out product futures. This portlet shows projects and products, which have different stages based on their product lifecycle stage. The Roadmap portlet provides baselined data only, including baseline effort and cost as compared to actuals. Drill down to review project, or product dependencies and their hierarchies.

The following columns are displayed on this portlet:

Product Line/Investment

The product line that the project or product belongs to (parent) or the name of the project or product (child). Click the + sign to view the projects or products assigned to the product line. Click the item to open the project or product properties page.

Dependencies Icon

Click the icon to open the project or product dependencies page.

Hierarchy Icon

Click the icon to open the project hierarchy page.

Lifecycle Phase

The current stage of the project or product.

Status

The project or product status indicator.

Baseline Effort

The baseline number of hours on the project or product.

Baseline Cost

The total planned cost for the project or product.

Actual Effort

The actual number of baseline hours on the project or product.

Actual Cost

The total actual cost for the project or product.

The following portlet filter is available:

Product Line(s)

Click the Browse icon to filter by the product line from the investment.

Launch Dashboard Tab

The Launch Dashboard page contains two portlets that provide information specific to projects about to launch new products.

- Launch Performance by Brand
- Expected Product Launches by Product Line

Launch Performance by Brand

The Launch Performance by Brand portlet is designed to show the percentage of project launches that are on time. The portlet compares each brand according to a timescale of early delivery, on time, 30 days late, or more than 30 days late. The portlet combines all the projects in one brand and uses the difference between project completion date and project launch date to determine where the launch falls on the timescale.

- The column stacks represent the percent value for the difference between the launch date on the product against the launch date on the project. The value is aggregated for each brand, so it represents an average.
- The Y-Axis displays the name of the brand.
- The X-Axis displays percentages from 0 to 100.

The following portlet filters are available:

Brand

Click the multi-select browse icon to pick one or more brands for display in the portlet.

Year

Select a year from the drop-down list. Select All to view all of the portfolios.

Expected Product Launches By Product Line

For future planning, the portlet displays upcoming launches sorted by product line and distributed per year. The information is very useful for planning purposes to see if one product line is favored over another and to think about how launches affect the marketplace.

- Each column stack represents a product line and the total number of launches expected for the specified year.
- The Y-Axis displays the number of launches.
- The X-Axis displays the years.

The following portlet filters are available:

Year

Select a year from the drop-down list. Select All to view all the products.

Product Line

Click the multi-select browse icon to pick one or more of the product lines for display in the portlet.

R&D Dashboard Tab

The R&D Dashboard page contains the Strategic Planning Cost Analysis portlet that provides information specific to projects under development.

Strategic Planning Cost Analysis

The Strategic Planning Cost Analysis portlet shows executives and development management their spending per stage on one or more projects. You can select the project from the portlet filter and the fiscal time period.

- Each column stack represents one time period.
- Each stack in the column represents the planned cost for that particular stage.
- The Y-Axis displays monetary amounts based on the project financial plans.
- The X-Axis displays the selected fiscal time periods.

The following portlet filters are available:

Product Category

Select a category from the drop down list.

Project(s)

Click the multi-select browse icon to pick one or more projects for display in the portlet.

Period Type

Required. Select a period type (Monthly or Quarterly) from the drop-down list.

Period

Select a specific fiscal time period from the drop-down list.

Portfolio Management Dashboard (NPD Accelerator)

The Portfolio Management Dashboard provides project portfolio managers with a collection of portlets that show metrics specific to idea, project, and product portfolios.

Portfolio Management Overview

The Overview page contains three portlets that provide the project portfolio manager with metrics specific to the idea, project, and the product portfolios:

- Gate Review
- My Action Items
- My Projects

To view the portlets, click Portfolio Management Dashboard in the New Product Development menu. The overview page displays.

The [Gate Review](#) (see page 52) and [My Action Items](#) (see page 54) portlets display identical functionality to the portlets found in the Executive Dashboard.

My Projects

The My Projects portlet shows all the projects currently moving through the gating process.

The following columns are displayed on the portlet:

Project

The name of the project. Click on the name to drill down to the project properties page.

Current Stage

The current stage of the project.

Team

Click the Detailed Resource Information icon to drill down to the team detail page.

Tasks

A list of the tasks completed or currently running for the project. Click the icon to drill down to the WBS page of project tasks.

Documents

Click the Document Manager icon to drill down to the project document manager page.

Stage Review

Click the icon to drill down to the Stage Review portlet.

The following portlet filters are available:

Project Name

Enter a name to search by project.

Project Manager

Select a manager from the drop-down list.

Project ID

Enter an ID to filter by project ID.

Active

Select a project status from the drop-down list (All, Yes, or No).

Pipeline Planning

The Pipeline Planning page contains three portlets that display portfolio and project metrics.

- Projects in Development
- My Portfolios
- Prioritized Scored List of Projects

Projects in Development

The Projects in Development portlet provide a portfolio manager with an understanding of upcoming project loads based on stages.

The portlet is a bubble chart designed to provide a view of a group of projects based on their current stage and costs. The background colors represent each stage and the bubble colors represent gate decisions. The size of the bubble indicates how high the gate score was (the larger the bubble, higher the score).

My Portfolios

My Portfolios is a snapshot portlet designed to show metrics for the portfolios you have access to view based on your role.

The following columns are displayed on the portlet:

Portfolio

The name of the portfolio.

Budgeted Benefit

The planned benefit field on the portfolio.

Budgeted Cost

The planned cost field on the portfolio.

Cost Variance

The variance subtracting cost from benefit.

Stoplight Icon

- If the variance is from 0 to 9,999,999 then a green stoplight is shown (under budget).
- If the variance is from -9,999,999 to 0 then a red stoplight is used (over budget).

No filtering is available because of the nature of the portlet.

Prioritized Scored List of Projects

Prioritized Scored List of Projects is a snapshot portlet designed to show metrics for the portfolios you have access to view based on your role. No filtering is available because of its nature, displaying the portfolios the user can view.

The following columns display on the portlet:

Project

The name of the project. Click on the name to drill down to the project details page.

Stage

The current stage on the project.

Gate Score

The stoplight icon and gate score number (from the idea gate score field).

- Green = Go
- Yellow = Hold
- Red = Kill

Gate Decision

The current gate decision represented by a colored, directional arrow.

- Green = Go
- Yellow = Hold
- Red = Kill
- Blue = Recycle

Manager

The user assigned to manage the project.

Strategic Fit and Importance

The standard stoplight.

- Green = Aligns Very Well
- Blue = Supports
- Yellow = Somewhat
- Red = Not Aligned

Product and Competitive Advantage

The standard stoplight.

- Green = Significant
- Blue = Positive
- Yellow = Modest
- Red = Limited

Potential Market Gain

The standard stoplight.

- Green = Large
- Blue = Significant
- Yellow = Modest
- Red = Small

Synergies - Leverage Core Competencies

The standard stoplight.

- Green = Excellent Opportunity
- Blue = Considerable Opportunity
- Yellow = Some Opportunity
- Red = No Opportunity

Technical Feasibility

The standard stoplight.

- Green = Excellent Feasibility
- Blue = Good Likelihood of Feasibility
- Yellow = Limited Feasibility
- Red = Not Feasible

Reward to Company

The standard stoplight.

- Green = Excellent
- Blue = Good
- Yellow = Modest
- Red = Poor Reward

The following portlet filters are available:

OBS Unit

Click the browse icon to filter by OBS unit.

Manager

Click the browse icon to filter by project manager resource name.

Stage

Click the browse icon to filter by project stage.

Gate Decision

Select an option from the drop-down list to filter by gate decision (Go, Hold, Kill, or Recycle).

Portfolio Metrics

The Portfolio Metrics page contains the Master Portfolios portlet that display data about portfolios.

Master Portfolios

Master Portfolios is a snapshot portlet designed to display hierarchies of portfolios. A parent portfolio can be selected and different configurations of the children portfolios can be selected.

The following columns display on this portlet:

Portfolio

Displays the portfolio name. Click on the name to drill down to the portfolio scorecard page.

Portfolio Planned Cost

The planned cost of the portfolio.

Investments Planned Cost

The planned cost value of all investments in the portfolio.

Cost Variance

Displays the variance subtracting the total cost of investments from the portfolio planned cost.

Variance Stoplight

Displays the variance from the planned costs.

- If the variance is from 0 to 9,999,999, a green stoplight is used (under budget).
- If the variance is from -9,999,999 to 0, a red stoplight is used (over budget).

Portfolio Planned Revenue

Total planned revenue for the portfolio.

The following portlet filters are available:

Portfolio

Click the browse icon to filter by portfolio name.

Parent Portfolio

Click the browse icon to refine the filter to search by parent portfolio name.

Idea Management Dashboard Overview (NPD Accelerator)

The idea management overview page provides general information for a marketing or product manager. The following portlets display on the page:

- Ideas
- Idea Gate Review
- My Action Items
- Idea Processes

Ideas

The Ideas portlet provides the means to create ideas. The only functionality in the portlet is the New button, which links to the create idea page.

Idea Gate Review

The Idea Gate Review portlet is similar to the [Gate Review](#) (see page 52) portlet except it displays more information specific to ideas. The portlet shows all the submitted ideas currently going through the screening (gating) process, providing quick updates to marketing and product managers as they gauge where ideas are in the approval process.

The following columns display on the portlet:

Gatekeeper

The name of the gatekeeper. Click on the name to drill down to the resource properties page.

Properties Icon

Click on the icon to view the gate scoring properties page.

Idea

The name of the idea. Click on the name to drill down to the idea properties page.

Stage

The current stage of the idea.

Score Date

The date when the gate score was completed.

Gate Score

The stoplight icon and gate score number (from the idea gate score field).

Idea Comparison

Click on the icon to drill down to the idea comparison page.

The following portlet filters are available:

Gatekeeper

Click the browse icon to filter by resources assigned as Gatekeepers.

Stage

Click the browse icon to filter by stage.

Score Date

Select a date range to filter by the score date.

Idea

Click the browse icon to filter by stage.

Manager

Click the browse icon to filter by resources who have been assigned as managers.

Status

Select an idea status from the drop down list (All, Approved, Unapproved).

My Action Items

My Action Items portlet displays all the notifications and scheduled action items that a marketing, process, or product manager receives.

The following columns display on the portlet:

Action Item

The name of the action item. Click on the action item to drill down to the action item details page.

Priority

Based on high, medium, or low priority with corresponding red, yellow, or green stoplights.

Status

Displays the status.

Values: Open, Closed, Deferred, Done, and In Progress

Date Received

The date that the action item was assigned to the user.

Process Icon

Click on the icon to drill down to the process diagram page.

The following portlet filters are available:

Status

Specifies the status.

Idea Processes

The Idea Processes portlet quickly updates a product or marketing manager as to the current ideas moving through approval process. You can click the process icon to see the progress of idea and drill down to the idea properties page.

The following columns display on the portlet:

Idea

The name of the idea. Click on the name to drill down to the idea properties page.

Status

The status of the idea: Aborted, Aborting, Done, Error, Running.

Start Date

The date that the process was initiated.

End Date

The date that the process was marked as Done.

The following portlet filters are available:

Idea Requester

Click the browse icon to select an individual resource and display only their ideas in the portlet.

Status

Select a status from the drop-down list.

Start Date

Select the date to filter by the process start date.

Stage Review (NPD Accelerator)

The Stage Review Dashboard provides project managers with access to all the pertinent areas they review before submitting an idea or project for approval to move on to the next stage. The page level filtering allows you to select a project and a stage to view one stage across all the portlets.

Resource Review Tab

The Resource Review page contains one portlet that provides the project manager with general resource information.

To view the portlet, open the New Product Development menu, and from Stage Review, click Resource Review.

Resource Utilization

The Resource Utilization portlet shows the resources that have been assigned to the project. The portlet displays allocations, assignments, and the variance between them by time period. For data to appear in the portlet, allocate resources to the project and assign them to tasks. The time periods appear in a row above the column headers.

The following four columns repeat with each time period.

Resource

Displays the name of the resource (last name, first name) associated with the specific issue. To open the resource or role allocations page, click the resource name.

Allocation

The number of hours the resource is allocated to the selected project.

Assignment

The number of hours the resource is assigned to the selected project.

Variance

The difference between Allocation minus Assignment. For a negative number, the user is under-allocated. For a positive number, the user is over-allocated.

The following portlet filters are available:

Project

To search by project, enter a project name.

Stage

Click the browse icon to filter by stage; only the resources who are assigned to tasks in that stage appear.

Resources Only?

Select an option (All, No, Yes).

Manager

Click the browse icon to filter by manager name.

Period Type

Select a period type from the list.

Document Review

The Document Review page contains four portlets that show documents from the document manager repository in different views.

- Deliverables
- Gate Documents
- Worksheets
- All Documents

To view these portlets, open the New Product Development menu, and from Stage Review, click Document Review.

By default, only the All Documents portlet displays. To view the remaining three portlets, select them from the drop-down list.

All Documents

The All Documents portlet is a complete listing of all the documents uploaded to the project. The portlet displays information about the project schedule, due dates, and categories and provides a link to drill down to the document itself. The portlet is designed for project managers to view all the documents currently available for the project.

The following columns display on the portlet:

Document Manager Icon

The link to the document manager to view the entire folder structure and documents. Click on the document name to drill down to the Collaboration - project document manager page.

Document

The name of the document and also serves as a link to open the document. Click on the document name to open the document.

Status

The status of the document. The options are tied to standard stoplights:

- Green = Approved
- Yellow = Submitted
- Red = Rejected

Schedule

The schedule is based on the completion date for the task (phase) that the document is associated with. All documents for a phase require completing by the end date of that phase.

- Green = If the task finish date is greater than 30 days from today.
- Yellow = If the task finish date is greater than or equal to today and less than 30 days from today
- Red = If the task finish date is past
- Blue = All else

Due Date

Displays the date of completing the milestone task that matches the documents folder.

Stage

The document folder. Each of the folders represents a project stage and is labeled with the same names as the project stages.

Important! Each folder is linked to the phase part of the WBS. For example, Scoping, Business Case, or Development. Do not change the names of the folders and phases. Otherwise, the document review portlets do not work correctly. If changing the folder and phase names is necessary, modify all the document review portlets with the new names.

Category

The document category assigned to a document when it is uploaded to the repository. The category can be any of: Proposal, Planning, Development, Implementation, Operations.

Owner

The individual that uploaded the document. Click on the owner name to drill down to the resource properties page.

Last Updated Date

The date when the most recent version was uploaded to the repository.

Last Revision Comments

The comments list from the latest version that was uploaded to the repository.

The following portlet filters are available:

OBS

Filter by Standard Organizational Breakdown Structures (OBS).

Project

Filter by project.

Stage

Filter by stage based on the stage values for NPD.

Manager

Filter by manager.

Status

Filter by project status (approved or unapproved).

Document Category

The document categories of Proposal, Planning, Development, Implementation, Operations.

Document Status

Filter by status (Approved, Rejected, Submitted).

Document Schedule

A lookup with two choices: All, for all the documents and Late, for the ones that are late in relation to the milestone task finish date.

Document Owner

Filter by the user who uploaded the document.

Document Name

A free entry text field to type in the document name or part of the document name using wildcards.

Document Due Date

A date range filter to retrieve those documents that have due dates between the entered dates.

Deliverables

The Deliverables portlet is identical to the All Documents portlet except that it limits the display to the documents that are in a Deliverables folder in the document repository.

Gate Documents

The Gate Documents portlet is identical to the All Documents portlet except that it limits the display to the documents that are in the Gate Documents folder in the document repository.

Worksheets

The Worksheets portlet is identical to the All Documents portlet except that it limits the display to the documents that are in the Worksheets folder in the document repository.

Idea Management Dashboard

The Idea Management Dashboard is built for product managers and marketing managers who require accessing idea metrics as they push ideas through the approval process.

Idea Vault

The Idea Vault page provides a complete listing of all the ideas entered and general idea information for a marketing or product manager. The page includes a built-in power filter to automatically include all ideas that have gone through the idea scoring process. The Idea Vault provides a view of all reviewed ideas and the ability to create 'what if' scenarios to finalize product portfolio plans.

Use this portlet to filter by gate decision to determine the number of ideas converted to projects, put on hold, or killed. The portlet shows the key gate factors and gate decision, and the ability to drill down to the idea properties for more details.

Kill and Hold ideas are maintained in the Idea Vault so they can be reviewed for future consideration at any time. Only ideas that have gone through the scoring/screening process are maintained in the Idea Vault.

To view the portlet, open the New Product Development menu, and from Idea Management Dashboard, click Idea Vault.

The following columns are displayed on the portlet:

Idea

The name of the idea. Click on the name to drill down to the idea properties page.

Gate Score

The stoplight icon and gate score number (from the idea gate score field).

Gate Decision

The current gate decision represented by a colored, directional arrow.

- Green = Go
- Yellow = Hold
- Red = Kill

Strategic Fit and Importance

The red/yellow/green stoplight.

- Green = High
- Yellow = Medium
- Red = Low

Product and Competitive Advantage

The red/yellow/green stoplight.

- Green = High
- Yellow = Medium
- Red = Low

Market Attractiveness

The red/yellow/green stoplight.

- Green = High
- Yellow = Medium
- Red = Low

Reward to Company

The red/yellow/green stoplight.

- Green = High
- Yellow = Medium
- Red = Low

Synergies - Leverage Core Competencies

The red/yellow/green stoplight.

- Green = High
- Yellow = Medium
- Red = Low

Technical Feasibility

The red/yellow/green stoplight.

- Green = High
- Yellow = Medium
- Red = Low

Customer Market

The customer market value taken from the investment attribute.

Customer Segment

The customer segment value taken from the investment attribute.

The following portlet filters are available:

Product Category

The selected product category on the idea.

Product Line

Select a product line from the drop-down list.

Product Type

Select a type to filter the product type.

Brand

The idea brand.

Strategy

Select an idea strategy from the drop-down list.

Customer Market

Select a market from the drop-down list.

Customer Segment

Select a segment from the -down list.

Gate Decision

Click the multi-select browse icon to filter by a combination of decisions.

Idea Financials

The idea financials page contains one portlet that displays financial data about Ideas.

To view this portlet, open the New Product Development menu, and from Idea Management Dashboard, click Idea Financials.

Idea Revenue and Cost

The Idea Revenue and Cost portlet provides a view of the potential dollars made and dollars spent for all ideas. The portlet displays two columns for each idea: the red column represents the costs and the blue column represents the revenue.

- The red column indicates costs.
- The blue column indicates revenue.
- The Y-Axis displays the cost/revenue amount. The values are derived from the idea Planned Cost field and the Planned Benefit field.
- The X-axis displays idea names.

The following portlet filters are available:

Product Category

The product category from the idea.

Product Line

Select a product line from the drop-down list.

Strategy

Select a strategy from the drop-down list.

Customer Market

Select a customer market from the drop-down list.

Customer Segment

Select a customer market from the drop-down list.

Gate Decision

Select a decision filter from the drop-down list.

Financial Review Tab

The Financial Review page contains a portlet that displays different levels of the project cost and benefit plans.

To view this portlet, open the New Product Development menu, and from Stage Review, click Financial Review.

Financial Plan vs. Actual Review

The Financial Plan vs. Actual Review portlet is a complete listing of all the documents that have been uploaded to the project. The portlet shows planned and actual costs and benefits and the variance between them. The information is available at each cost plan detail level in a hierarchical display.

The first level is the Investment, the second level is the Cost Plan and Benefit Plan, and the third level and down are the detail rows on the cost and benefit plans.

The following columns display on this portlet:

Investment/Plan Detail

Displays the name of the investment and the name of the cost and benefit plan.
Click the investment name to open the project properties page.

Planned

Displays the planned cost or planned benefit number depending on the row.

Actual

Displays the actual cost or actual benefit number depending on the row.

Variance

The difference between Planned minus Actual. For costs, a negative number more spending than planned. For a positive number, less money spent than planned. For benefits, a negative number signals the revenues were greater than anticipated. If there is a positive number, the revenues were less than anticipated.

The following portlet filters are available:

Project

Click the browse icon to filter by project.

Stage

Select a project stage from the drop-down list.

Period Type

Select a period type from the drop-down list.

Period Start

Select the date based on the start date for the time period.

Period End

Select the date based on the end date for the time period.

Schedule Review

The Schedule Review page contains one portlet that displays the project work breakdown schedule.

To view the portlet, open the New Product Development menu, and from Stage Review, click Schedule Review.

Master Schedule

The Master Schedule portlet is a complete listing of tasks in the WBS. The portlet includes task metrics such as ETC, baseline cost, actual costs, finish date, days late, and several others. The place is where the project manager can confirm that all the tasks for a specific gate are completed and when ready, the project manager can drill down to the specific gate milestone, and submit for the approval to move on to the next gate.

The following columns display on the portlet:

Project/WBS/Resource

The name of the project, the name of the task, or the name of the resource, depending on the level expanded in the hierarchy. Click on the project name to drill down to the project or task or resource properties page.

Finish

The date for completing the task.

Days Late

The calculated number of days of delay.

ETC

The number of ETCs on the task.

ETC Cost

The monetary amount of ETCs on the task.

Baseline Cost

A monetary amount for the baseline cost. Baseline the project to get the data.

Actual

The actual hours for the task.

Actual Cost

A monetary amount for the actual cost. Baseline the project to get the data, and requires timesheets submitted, approved, and posted.

EAC Cost

A monetary amount for the EAC cost. Baseline the project to get the data.

Gantt

Defaults to a monthly display. List the months across the top and display a colored bar to mark progress of the task.

The following portlet filters are available:

Project

Click the browse icon to filter by project.

Stage

Click the browse icon to filter by stage.

Project Manager

The project manager from the project object.

Status

Select a project status from the drop-down list (Approved or Unapproved).

Critical Issue Review

The critical issue review page contains one portlet that displays all the issues from the project (not risks or change requests).

To view this portlet, open the New Product Development menu, and from Stage Review, click Critical Issue Review.

Project Issue Review

The project issue review portlet displays all of the issues for a project. The portlet includes the description and stoplight displays for schedule and priority. The project manager can check on resolution dates and drill down to view specific issues.

The following columns display on this portlet:

Schedule

The red/yellow/green stoplight based on the target resolution date and the number of days before or after marking the issue as resolved. An attribute created with the NSQL query for the portlet:

- Green = -100,000 to 1
- Yellow = 1 to 3
- Red = 3 to 100,000

Priority

The red/yellow/green stoplight based on the priority for the issue. An attribute created with the NSQL query for the portlet:

- Green = Low
- Yellow = Medium
- Red = High

Issue ID

The issue ID number. Click on the ID number to drill down to the issue properties page.

Issue Description

The description of the issue. Click on the description to drill down to the issue properties page.

Category

The issue category name.

Owner

The owner for the issue, displayed as last name, first name. Click on the owner name to drill down to the resource properties page.

Email Icon

A link to send an email to the owner. Click on the icon to send an email to the project owner.

Target Resolution Date

The target resolution date on the issue.

The following portlet filters are available:

OBS

Filter by Standard Organizational Breakdown Structures (OBS).

Manager

Click the browse icon to filter by the issue category.

Status

Click the browse icon to filter by project.

Project

Click the browse icon to filter by project.

Stage

Issue Category

Click the browse icon to filter by the issue category.

Issue Priority

Select a priority from the drop-down list.

Issue Owner

Click the browse icon to filter by project.

Issue Status

Select a status from the drop-down list.

Target Resolution Date

Select a date range to look for issues between dates.

Portfolio Master Page Layouts (NPD Accelerator)

Portfolios allow managers to group and view their investments together. CA Clarity PPM Accelerator for NPD has two portfolio portlets that allow project and product managers to create scenarios when they build out portfolios and compare changes in schedule, cost, and resources from a scenario, with their current plan of record.

The [Product Master Portfolio page layout](#) (see page 80) is a set of pages and portlets that can be selected as the layout when viewing a portfolio. The layout is designed to work with product portfolios where an organization is tracking specific product lines or brands.

The [Project Master Portfolio page layout](#) (see page 86) supports the NPD metrics for projects. The layout includes portlets to assist with future project planning and reviewing of costs and revenues.

Product Master Portfolio Page Layout

Costs and revenues can be tracked using existing CA Clarity PPM functionality. Product Master Portfolio populates all or a subset of products. Product Managers wanting to track groups of products according to product line and brand, can build with the power-filter in Portfolios.

The product master portfolio page layout comprises several comparison portlets to compare the current plan of record with different scenarios. Competitor information can be tracked for products and to create competitor portfolios for use in product planning.

Market Analysis Tab

The Market Analysis page contains four portlets that provide general information for a marketing or product manager.

- Product Market Growth (plan of record)
- Product Market Growth
- Product Financials (plan of record)
- Product Financials

To view these portlets, click Portfolios in the Portfolio Management menu. Click the NPD Product Master link, and then click Market Analysis.

Product Market Growth (plan of record)

The Product Market Growth (plan of record) portlet is a bubble chart that displays individual products based on their product category. For example, new to world or new to company. The portlet displays the current plan of record for a product portfolio (the portfolio requires products in it for the bubble chart to work).

The portlet compares some of the metrics for the product price trend on the X-axis and the product market projections on the Y-axis. For example, the portlet provides a view of which products have stronger price points and higher market gains against products having good market gain but weak price points. Several other comparisons can be made with the portlet data.

The legend lists each of the following attributes with the colors:

X-Axis

Product Price Position.

Y-Axis

Market Growth Projection.

Bubble Color

The bubble color represents the product category.

- Green = New to World
- Blue = New to Company
- Grey = Line Extension
- Purple = Modification
- Yellow = Enhancement

Bubble Size

Market Attractiveness

The following portlet filters are available:

OBS Unit

Click the browse icon to filter by OBS unit.

OBS Unit Filter Mode

Select a filter mode from the drop-down list.

- Unit only
- Unit and descendants
- Unit and ancestors

Product Market Growth

The Product Market Growth bubble chart is similar to the Product Market Growth (plan of record) portlet. The portlet also displays individual products based on their product category. But now they are based on a selected scenario, rather than the plan of record.

The legend lists each of the following attributes with the colors:

X-Axis

Product Price Position (Calculated).

Y-Axis

Market Growth Projection (Calculated).

Bubble Color

The bubble color represents the product category.

- Green = New to World
- Blue = New to Company
- Grey = Line Extension
- Purple = Modification
- Yellow = Enhancement

Bubble Size

The bubble size represents the market share.

The following portlet filters are available:

OBS Unit

Click the browse icon to filter by OBS unit.

OBS Unit Filter Mode

Select a filter mode from the drop-down list.

- Unit only
- Unit and descendants
- Unit and ancestors

Product Financials (plan of record)

The following columns are displayed on the portlet:

Product

The product name. Click on the name to drill down to the product properties page.

Grid with Plus (Add to Scenario) Icon

Click the icon to drill down to the create scenarios page.

Product Category

The selected product category on the project.

Planned Revenue

Total planned revenue for the project.

Planned Cost

Total planned cost for the project.

Actual Cost

Total actual cost for the project.

Remaining Cost

The difference between actual cost and planned cost.

Planned NPV

NPV percentage from the project.

Planned ROI

ROI percentage from the project.

Planned Breakeven

Displays the date and amount to indicate the period and value at which the program becomes profitable.

The following portlet filters are available:

Planned NPV

NPV percentage from the project.

Planned ROI

ROI percentage from the project.

Product Financials

The following columns are displayed on the portlet:

Name

The product name. Click on the name to drill down to the product properties page.

Grid with Plus (Add to Scenario) Icon

Click the icon to drill down to the Create Scenarios page.

Product Type

The selected product type on the project.

Planned Benefit

The total planned benefit of the portfolio.

Planned Cost

Total planned cost for the project.

Actual Cost

Total actual cost for the project.

Remaining Cost

The difference between actual cost and planned cost.

Planned NPV

NPV percentage from the project.

Planned ROI

ROI percentage from the project.

Planned Breakeven

Displays the date and amount to indicate the period and value at which the program becomes profitable.

The following portlet filters are available:

OBS Unit

Click the browse icon to filter by OBS unit.

OBS Unit Filter Mode

Select a filter mode from the drop-down list.

- Unit only
- Unit and descendants
- Unit and ancestors

Competitive Analysis

The Competitive Analysis page contains two portlets that provide general information for a marketing or product manager.

- Competitive Comparison (plan of record)
- Competitive Comparison (compare to)

To view the portlets, click Portfolios in the Portfolio Management menu. Click the NPD Product Master link, and then click Competitive Analysis.

Competitive Comparison [Plan of Record]

The Competitive Comparison [Plan of Record] portlet is a bubble chart that displays individual products based on their product category. For example, new to world or new to company. The portlet displays the current plan of record for a product portfolio (the portfolio must have products in it for the bubble chart to work).

The portlet compares the metrics for the competition rating on the X-axis and the customer value perception on the Y-axis. The portlet helps product analysts review competitive information in the plan of record as compared to a scenario.

The legend lists each of the following attributes with the colors:

X-Axis

Competition Rating.

Y-Axis

Customer Value Perception.

Bubble Color

The bubble color represents the product category.

- Green = New to World
- Blue = New to Company
- Grey = Line Extension
- Purple = Modification
- Yellow = Enhancement

Bubble Size

Market Share

The following portlet filters are available:

Planned Cost

Enter a range for the planned cost.

Finish Date

Enter a date range.

Competitive Comparison [Competitors]

The Competitive Comparison [Competitors] bubble chart is similar to the Competitive Comparison [Plan of Record] portlet. the portlet also displays individual products based on their product category, except it displays for a selected scenario, rather than the plan of record.

The portlet compares the metrics for the competition rating on the X-axis and the customer value perception on the Y-axis. The portlet helps product analysts review competitive information in the plan of record as compared to a scenario.

The legend lists each of the following attributes with the colors:

X-Axis

Competition Rating.

Y-Axis

Customer Value Perception.

Bubble Color

The bubble color represents the product category.

- Green = New to World
- Blue = New to Company
- Grey = Line Extension
- Purple = Modification
- Yellow = Enhancement

Bubble Size

Market Share

The following portlet filters are available:

Planned Cost

Enter a range for the planned cost.

Finish Date

Enter a date range.

Project Master Portfolio Page Layout

The Project Portfolio Page Layout is a set of pages and portlets you can select as the layout when viewing a portfolio. This layout is built for project managers to view groups of projects to review statistical trends and metrics.

Scorecard Tab

The Scorecard page contains the Projects portlet that displays project metrics.

To view the portlet, open the Portfolio Management menu, click Portfolios. Click the NPD Project Master link, and then click Scorecard.

Projects

The Projects portlet is a listing of all the projects in the selected portfolio. The portlet shows a variety of metrics with graphics for easy viewing of project status. The portlet also includes costs, ROI, and NPV. This portlet is reminiscent of the Idea Vault, but instead of ideas, you have projects in all the different statuses and states of execution.

The following columns display on the portlet:

Project

The name of the project. Click on the name to drill down to the project properties page.

Hierarchy Icon

Click the icon to drill down to the project hierarchy page.

Grid with Plus (Add to Scenario) Icon

Click the icon to drill down to the portfolios scenarios page.

Gate Score

The spotlight icon and gate score number (from the project or idea gate score field).

Gate Decision

The current gate decision represented by a colored, directional arrow.

- Green = Go
- Yellow = Hold
- Red = Kill
- Blue = Recycle

Stage

The current stage of the project.

Customer Market

The customer market selection on the project.

Product Category

The selected product category on the project.

Ranking

An attribute on the project that allows selection of a number from 1 to 10 to rank projects from most to least important.

Planned Revenue

Total planned revenue for the project.

Planned Cost

Total planned cost for the project.

Actual Cost

Total actual cost for the project.

Remaining Cost

The difference between actual cost and planned cost.

Planned ROI

ROI percentage from the project.

Planned NPV

NPV percentage from the project.

The following portlet filters are available:

Product Category

Select a category from the drop-down list.

Product Line

Select a product line from the drop-down list.

Gate Decision

Select a gate decision from the drop-down list.

Customer Market

Select a customer market from the drop-down list.

Customer Segment

Select a customer market from the drop down list.

Stage

Filter by stage; based on the stage values for NPD.

Gate Score

Filter by gate score; enter a score in the field.

Project Manager

Click the browse icon to filter by project manager.

Resources

The resources page contains a portlet that provides the role demand data.

To view the portlet, open the Portfolio Management menu, click Portfolios. Click the NPD Project Master link, and then click Resource Demand on Projects.

Resource Demand on Projects

The Resource Demand on Projects portlet highlights the total resource and role hours per project, such as start and end dates, and planned cost. Portfolio managers can easily link back to the scenarios tab to play with increasing or decreasing roles for these projects.

The following columns display on the portlet:

Project

The name of the project. Click on the name to drill down to the project properties page.

Grid with Plus (Add to Scenario) Icon

Click the icon to drill down to the portfolios scenarios page.

Ranking

An attribute on the project that allows selection of a number from 1 to 10 to rank projects from most to least important.

Start

The date of starting the project.

Finish

The date of completing the project.

Role Demand

The total number of resource or role hours based on the start and end date for the portfolio. The value does not mirror the total amount of hours on the project if the project falls outside of the range for the portfolio.

Planned Cost

Total planned cost for the project.