

TOOL OVERVIEW



NPD STAGE GATE WORKFLOW MANAGER



TOOL OVERVIEW – NPD STAGE GATE WORKFLOW MANAGER

TOOL SUMMARY

Our NPD Stage Gate Workflow Manager enables the user to streamline and automate repeatable tasks within the company by reducing manual entry in formats that are clear and easy to complete, minimising room for errors and increasing overall efficiency.

By clearly mapping out the workflow stage gates, all users are aware of what tasks must be completed, who will be completing them, who will be approving them and when they need to be finished. When the process has been clearly mapped out and approved, a manager can spend less time micromanaging their employees to ensure tasks are completed. There is no questioning on what step the project is at or if something has gone wrong as all users will have the ability to view the workflow status and overall progress.

Using our customisable form builder options, the user can easily map out the process in a workflow format providing a clear, top level view of the required steps to be completed, giving the user(s) a greater insight into the processes. Employees who are best suited to perform a task based on their skill set can be assigned as a specific task completer, giving that user accountability and ownership.

As the NPD Stage Gate Workflow manager is stored in one central platform accessible to all approver users, there is no duplication of work and administration time is reduced. When a step has been completed by the assigned user it can then be marked as complete, or alternatively if there is an assigned 'approver' this can trigger an automated email, informing the user their action is required on this step, allowing for 24/7 access to approve and monitor requests and tasks.

Having a fully tracked update history allows for better accountability and transparency of changes made.

Our reporting functionality helps you to analyse and compare your completed workflow projects and the customisable charts in our dashboards can provide a summary of how the projects are performing at a glance.

KEY FUNCTIONALITY – CURRENTLY AVAILABLE

Our NPD Stage Gate Workflow Manager has many features, the table below highlights the main actions you will be able to undertake using this tool and describes how each functionality is utilised within the system.

STAGE GATE PROCESS

The incorporation of a stage gate process provides a structure to evaluate, approve and monitor project as they move through the project life cycle. It is a critical component for project oversight within the business. Each stage gate process should be clearly mapped out and approved ahead of starting a new project, which will direct the scope of the project. Without a stage gate process in place, it can become easy to lose sight of a project status allowing key tasks to continue for months without management review or approval.

CUSTOMISABLE TEMPLATES

Build Workflow Manager templates that meet your requirements with our form builder's numerous field types including text, numeric, checkbox, dropdown and table options. Set fields as optional, mandatory or conditional mandatory based on an answer to a previous question. This allows the user to complete the form in an easy to read format with as little data entry as possible.

PREREQUISITE

Option to add prerequisites to some or, all of the steps built in workflow. This ensures the workflow is completed in the desired order, ensuring consistency and structure.

LINKED TOOLS

The additional option of linked tools allowed the workflow manager to communicate with the other tools on the Foods Connected system such as Specification Manager, Product Check Manager, recipe tool...

COMPLETERS & APPROVERS

Completers can be set for various steps in the workflow process to maintain control of Workflow Manager templates. Approvers can be set up for completed steps to ensure they have been completed to a satisfactory standard before they are marked as completed and approved. This can be assigned to both internal and external company users.

EMAIL TRIGGERS & NOTIFICATIONS

Set up automatic email triggers to notify assigned team members of completion required, completion overdue, approval required, approval overdue or a step being rejected, helping create a clear line of communication throughout the company.

SCORING CRITERIA

Option to build in a custom scoring system within forms in the workflow template. Using colour coded scoring criteria allows the user to quickly view the outcome of the check.

COMPLETION TIMEFRAME

Each step in the workflow will be assigned a time frame for completion. This will give all users and the assigned completer a clear guide on how long this step will take to complete. This will allow the workflow to be time managed highlighting any steps of the workflow which are completed early or overdue.

GANTT CHART

The Gantt Chart will give the user a full overview of the workflow manager project status in a table detailing what steps have been completed, what steps are upcoming and what steps are overdue. These will be detailed in conjunction with the workflow timelines including the start date, launch date and no. of hours assigned to each step for completion. It will visually detail the project status.

COLOUR CODED STATUSES

Colour coded workflow completion statuses immediately give you an overview if the workflow, has not been started yet, in progress, approved or required approval.

UPDATES HISTORY

All changes made to any step within the Workflow Manager are fully tracked allowing for full transparency and accountability.

REPORTING

Reporting can be carried out on Workflow Manager data to analyse the performance with summary charts.

DASHBOARDS

Create fully customisable dashboards including widgets from your Workflow step data which provide an instant overview of

Workflow projects completed.

ADDITIONAL FUNCTIONALITY – IN DEVELOPMENT

RECIPE TOOL

Recipe tool in development.
Continue to use current recipe process until go live date.

Improved visibility of child ingredients – [Feb 2020](#)
Requirement for another nutritional table – [April 2020](#)
Ingredient 'quick add' function – [March 2020](#)
Addition of required functions – [April 2020](#)
Recipe Scale Up Option – [May 2020](#)
Removal of unwanted functions – [June 2020](#)
Build in QUID calculations – [July 2020](#)
Build in cook loss function – [Aug 2020](#)
Requirement to build a recipe library – [Sept 2020](#)

DETAILED LAUNCH DATES

Launch date info to be added to the workflow manager detailing both the actual and expected. The expected launch date may modify if any of the steps are complete ahead or behind schedule – [Feb 2020](#)

EXPORTING DATA

Requirement for an export option, allowing the user to export various forms from the workflow template into other formats such as PDF – [March 2020](#)

STATUS DETAILS

Further information required for the status section of the workflow manager. Aim to provide the user with a quick overview on the template progress and expected completion date – [March 2020](#)

COMPLETION TIMELINE

Current timeline lacking detailed information. Key milestones to be added detailing progress to date – [April 2020](#)

VIDEO ADDITION

Requirement to include the option to add videos to forms – [May 2020](#)

ACCESSIBILITY FUNCTION

Various additional development required to further simplify the user experience with the workflow manager – [May 2020](#)

**LINKING
ADDITIONAL TOOLS**

COST DETAIL

**SAMPLE CHASER
MANAGER**

Development required to link tools such as specification manager with workflow to allow communication of ingredient and packaging specifications – [June 2020](#)

Review the option of exposing the cost files within FC to the workflow manager. Scoping required on how this would be managed internally – [Aug 2020](#)

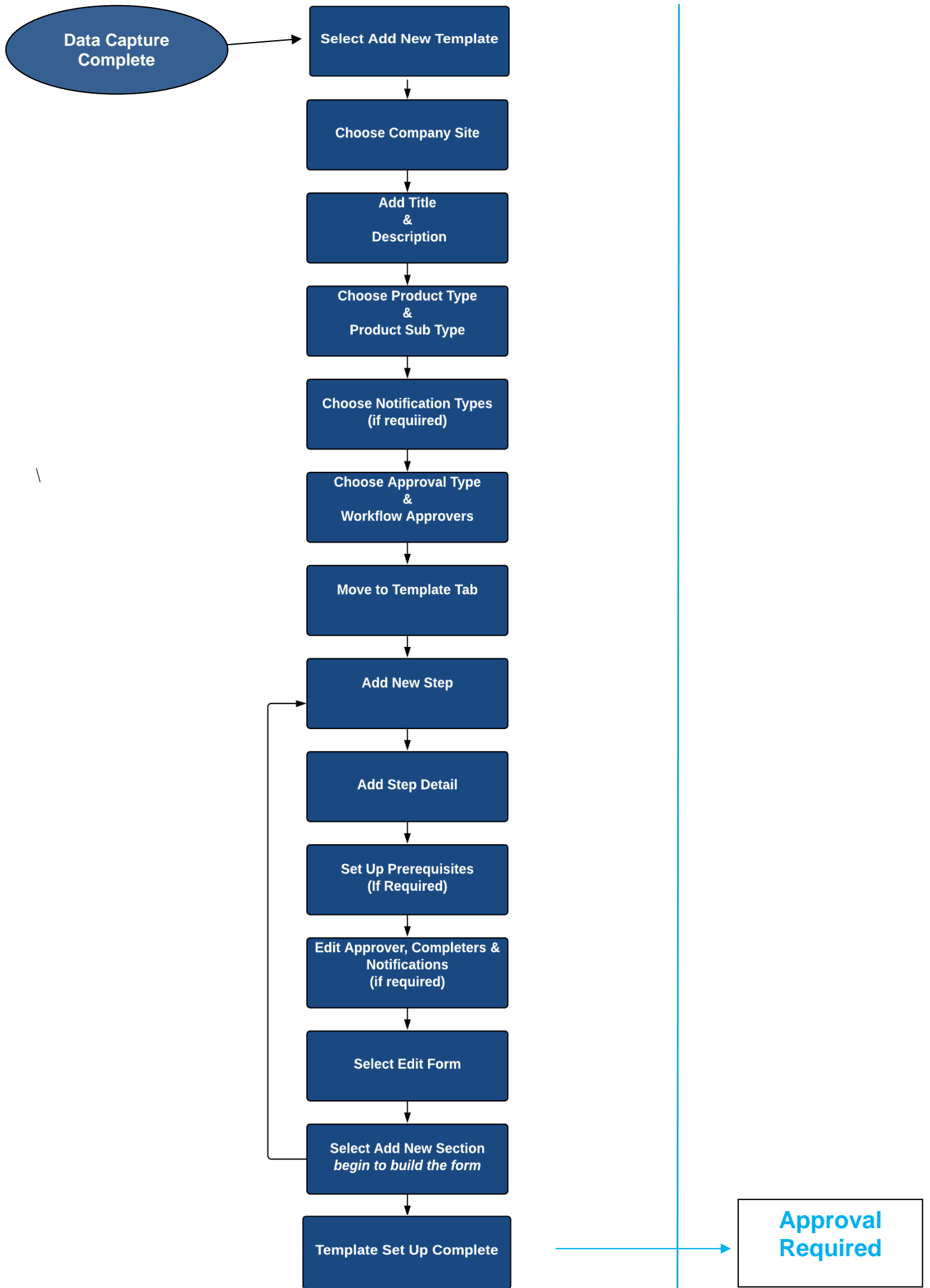
Scoping required by FC to map out the sample tool requirements, assessing if any of the current tools can offer this functionality - [Continue to use current process.](#)
[Completion date TBC](#)

TOOL PROCESS USAGE FLOW

The below process flow guides the user through the steps of creating a new workflow template.

Setting Up A New Workflow Template

Status

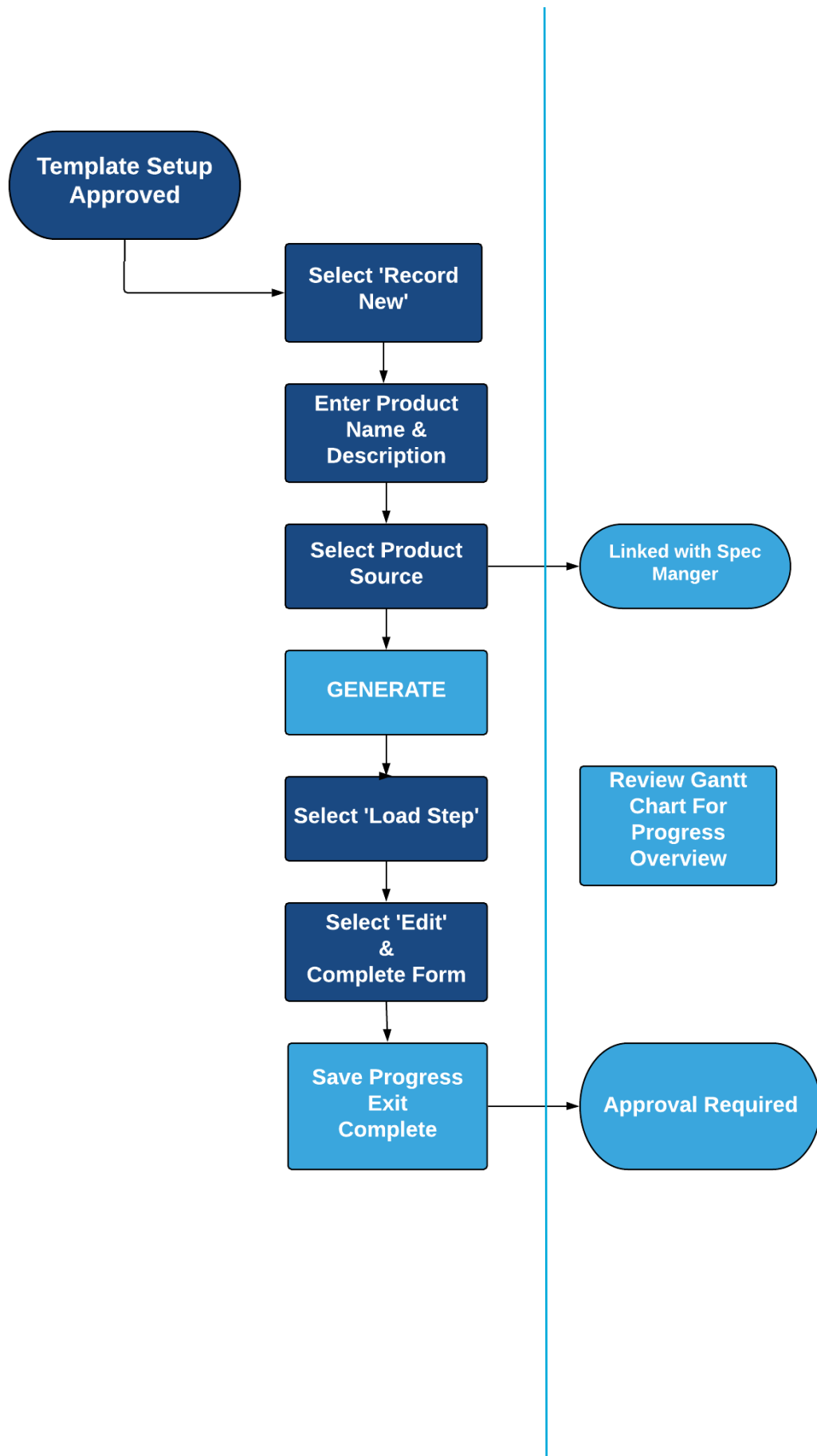


TOOL PROCESS USAGE FLOW

The below process flow guides the user through the steps of creating workflow project.

Setting up & completing a new workflow template

STATUS



DATA REQUIREMENTS

Detailed below are the data requirements of what will be necessary to set up and make decisions in before launching the Workflow Manager.

REQUIREMENTS	DETAILS
INTERNAL USERS ACTIVE	To allocate users to any step within the Workflow Manager they must first be active on Foods Connected.
WORKFLOW MANAGER TEMPLATE CONFIRMED	Once a Workflow Template has been created it must first be approved for use. This will approve each step, the forms built and all associated data. Once approved this template will be locked from further editing.
APPROVERS CONFIRMED	Internal users who will be assigned as a step approver will need to be confirmed before Workflow Template can be created.
EMAIL TRIGGERS	If email triggers are required, this can be selected when creating a Workflow Template. The user must first select the 'template notification type' that triggers an email alert in a template to inform the user an action is required or it a step is overdue or rejected.
ALLOCATED USERS	If there will be several users across several sites who will require access to the Workflow Manger, they must be pre agreed and provided with the correct access level.

APPENDIX 1 – DEVELOPMENT TIMELINES

- Multi-Site Options - [Jan 2020](#)
 - The NPD process of a new product may be done at different sites within HFG. The functionality will be required to allow the template to be assigned to various sites giving the user from that site access to the workflow (if approved)
- Launch dates – [Feb 2020](#)
 - The current NPD workflow template does not detail the launch date in any capacity. A key piece of information in terms of NPD, allowing the timelines and Gantt chart to be clearly mapped out.
- Improved visibility of child ingredients – [Feb 2020](#)
 - When building a recipe with child ingredients (a sub recipe) the visual difference between the parent and child ingredient is hard to distinguish.
- Exporting data – [March 2020](#)
 - Exporting the forms within a step (or various steps) to formats such as PDF/Excel which can be used in various setting such as customer meetings.
- Status detail – [March 2020](#)
 - The status section currently only details in the step has not been started, in progress or complete. Adding the current step detail would give the user more information.
- Requirement for another nutritional table – [April 2020](#)
 - Nutritional table 1 will pull data either from a pre-set data base (such as mc Cance) or the product specification on the FC system.
 - Nutritional table too will be required to allow the user to manually input the lab results following product testing and verification.
- Timeline – [April 2020](#)
 - Currently the overview timeline is lacking in information detailing only days taken and days until complete. Key markers are to be added to provide quick visual detail on steps completed and outstanding.
- Video addition – [May 2020](#)
 - Additional functionality required to allow the user to add videos to the forms, useful in a factory trial capacity.
- Recipe Scale Up Option – [May 2020](#)
 - This addition will allow the user to quickly set a batch size used in factory trials. This will automatically calculate the quantity or ingredients and raw material required based on the batch size.
- Removal of unwanted functions – [June 2020](#)
 - When adding a new ingredient, it asked user to complete Co. of Origin, Mixing bowl %, Dietary derivatives – a lot of testing required on this as it has the potential to cause issues with other FC tools such as the specification manager.
- Build in QUID calculations – [July 2020](#)
 - Development needed to review calculations for meat content (the % of fat, connective tissue and protein) and build these into the recipe tool.
- Build in cook loss function – [Aug 2020](#)
 - HFG will have data on the cook loss detail during their NPD cooking validation process (if applicable). This detail is to be captured and built into the system. FC need to understand if the nutritional data on the pack will be as sold or as consumed.
- Requirement to build a recipe library – [Sept 2020](#)
 - Over time HFG will generate many recipes. Further scoping required on how build a library to store the various recipe types, recipe codes, with optional tags for quick filtering.
- Accessibility – [May 2020](#)
 - Improving the overall user experience in the workflow manager, reducing manual data entry where possible, working through any additional errors arise

over the duration of development.

- Linking Additional Tools – [June 2020](#)
 - HFG currently use other FC tools such as specification manager & trading and planning. Development required to link these tools up allowing the data stored within each, to be communicated in a controlled manner, ensuring to not alter the source data in any way.
- Cost detail - [Aug 2020](#)
 - Review how the purchasing tool will interact with the NPD workflow manager in terms of pulling live cost detail for raw material, packaging and ingredients to generate cost file's for new product development. In dept testing required to ensure any manipulation of this data in the NPD workflow manager will not affect the live data stored in the purchasing tool.
- Sample Chaser Manager – [Long Term Development](#)
 - FC to have an in-depth scoping session on the full requirements for a samples chaser tool and the interaction required with the workflow manager. This functionality may need to sit outside the NPD workflow manager with the possibility of being a brand-new tool to the business.

APPENDIX 2 – NPD STAGE GATE WORKFLOW MANAGER – RUNTHROUGH

Template Name	NPD Workflow Manager (Version 1.0)		
Site	Group ▼		
Name	<input style="width: 100%;" type="text"/>		
Description	<div style="border: 1px solid #ccc; height: 80px; width: 100%;"></div>		
Product Sub-Type	Finished Product - Retail Pack		
Product Source	Select Existing Product ▼		
Select Product	<input style="width: 90%;" type="text" value="Search for product by name or product code"/>		Q
Start typing to search your <u>product file</u> for the product by Product Name or Code.			

A new NPD Workflow is quickly & easily created – the adjacent information is required.

Due Between:	Status:	Created By	Product	Search	
<input style="width: 80%;" type="text"/>	All ▼	All ▼	All ▼	<input style="width: 80%;" type="text" value="Search..."/>	Filter
<input style="width: 80%;" type="text"/>	Current Step	Assigned To			Clear Filters
	All ▼	All ▼			

[Generate From Template](#) [Delete Selected](#)

☐	Title	Version	Creation Date	Created By	Product	Current Step	Status	
<input type="checkbox"/>	Demo Product 3	1.0	27/01/2020 14:16:43	Claire McCrory	00001 - Demo Product 3	Gate 0 - Project Brief Due: Not started yet	In Progress	Edit
<input type="checkbox"/>	Demo Product 2	1.0	27/01/2020 14:13:34	Claire McCrory	000007-1 - Demo Product 2	Gate 0 - Project Brief Due: Not started yet	In Progress	Edit
<input type="checkbox"/>	Demo Product 1	1.0	22/01/2020 09:45:33	Claire McCrory	000007-0 - Test Product	Gate 0 - CE Food Trends Due: 24/01/2020	In Progress	Edit

NPD Workflow(s) will be displayed in the above format with quick filter options available.
 Selecting 'edit' will load the specific NPD workflow for that particular product.

The NPD workflow details are clearly labelled – an edit function is also available.

Notes can be detailed in a separate tab for referring back to at any stage.

The progress bar details the NPD workflow progress, it also lets the user know how many days until this NPD workflow project is fully complete.

Workflow Manager - Workflow Form - Demo Product 1

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Workflow Details Workflow Notes



Title	Demo Product 1 (Version 1.0)	Edit Details
Description	Demo Product 1	
Product	000007-0 - Test Product	
Created By	Claire McCrory	
Status	In Progress	
Date Started	22/01/2020 09:45:33	

Progress

Days Taken: 4

Expected Days to Complete: 6



[Gantt Chart](#)

Step Name	Started	Completed	Assigned User(s)	Status	
Gate 0 - Project Brief	22/01/2020 11:02:17	22/01/2020 15:02:17	Claire McCrory	Completed & Approved	Load
Gate 0 - Market Review	23/01/2020 10:02:23	30/01/2020 10:02:23	Claire McCrory	Completed & Approved	Load
Gate 0 - CE Food Trends	* 23/01/2020 11:37:41	24/01/2020 11:37:41 <i>(Expected)</i>	Claire McCrory	Requires Approval	Load
Gate 0 - Client Needs/Requests	* Not started	Not started	Claire McCrory	Not Started	Load
Gate 0 - Creative Sessions/Recipe Development	* Not started	Not started	Claire McCrory	Not Started	Load
Gate 0 - Product Idea List	* Not started	Not started	Claire McCrory	Not Started	Load
Gate 0 - Client Presentation & Feedback	* Not started	Not started	Claire McCrory Foods Connected Admin	Not Started	Load
Gate 0 - Product List After Feedback	* Not started	Not started	Claire McCrory	Not Started	Load
Gate 1 - Recipe Development	* Not started	Not started	Claire McCrory	Not Started	Load
Gate 1 - Handover Data	* Not started	Not started	Claire McCrory	Not Started	Load
Gate 1 - Process Verification/1st Process Test	* Not started	Not started	Claire McCrory	Not Started	Load
Gate 1 - Prepare Samples for client meeting	* Not started	Not started	Claire McCrory	Not Started	Load
Gate 1 - Sensory Evaluation Ahead of Client Meeting	* Not started	Not started	Claire McCrory	Not Started	Load

The status section will update as steps are started, completed or require approval.

Selecting 'load' will open the form built for that particular step.

Each step assigned completer and approver are also detailed.

The assigned completer(s) progress through the form adding all required detail.
 The user can save progress and return to complete the form at any stage.
 When as much information has been added as possible the user will select save and complete.
 Completed form example below.

Workflow Details

Workflow Notes

Gate 0 - Project Brief

Assign

Edit

1st Stage Internal Feasibility Document

Attended Anna Pajak ,
 Marcus Sherreard

Apologies None

Date 14/01/2020

Detail Project Objective Review product brief internally

Product 1

Product Image



Product One Image

Product Title/Sub Title Test Product 1

Product Weight 500.0 g

Weight: FW/CW Fixed Weight

Customer Tesco

Product Range Regular

Site Fresh Food Factory

First Submissions Date 29/02/2020

Product Positioning on Market Premium Product

Product BM on Market? Yes

Product Detail Add product detail here

Complete all steps in the NPD Workflow Manager until each step has been marked as completed and approved.

Workflow Details

Workflow Notes



Title	Demo Product 2 (Version 1.0)	Edit Details
Description	Demo Product 2	
Product	000007-1 - Demo Product 2	
Created By	Claire McCrory	
Status	In Progress	
Date Started	27/01/2020 14:13:34	

Progress

Days Taken: 1

Expected Days to Complete: 6



Gantt Chart

Step Name	Started	Completed	Assigned User(s)	Status	
Gate 0 - Project Brief	27/01/2020 15:00:08	28/01/2020 11:00:08	Claire McCrory	Completed & Approved	Load
Gate 0 - Market Review	27/01/2020 15:02:19	03/02/2020 15:02:19	Claire McCrory	Completed & Approved	Load
Gate 0 - CE Food Trends	27/01/2020 15:03:04	28/01/2020 15:03:04	Claire McCrory	Completed & Approved	Load
Gate 0 - Client Needs/Requests	27/01/2020 15:04:21	28/01/2020 15:04:21	Claire McCrory	Completed & Approved	Load
Gate 0 - Creative Sessions/Recipe Development	27/01/2020 15:05:17	28/01/2020 15:05:17	Claire McCrory	Completed & Approved	Load
Gate 0 - Product Idea List	27/01/2020 15:06:21	29/01/2020 15:06:21	Claire McCrory	Completed & Approved	Load