

# BASIC RESEARCH PLM “Blackbox”

Lessons “Learned” and Implementation  
“tricks” that we used... save yourself  
from missteps !

Aras Community Event  
May 2010



**Welcome:**

**Today I'm hoping to help you see some of the advantages we see in our New Product Lifecycle Management System (PLM) and keep you from making mistakes along the way.....**

**BASIC**  
RESEARCH



BLACK BOX  
AI PLM

## What is Basic Research ?



For almost two decades we've been distributing innovative formulations that address the specific needs of consumers – from weight loss to bodybuilding, anti-aging, joint health, skin care, cosmetics, and more.

We create the formulas , the marketing, and sell direct via 2800 web domains , a 100+ person call ctr., and distribute to over 17,000 retail outlets worldwide.

You can find our products at Wal-Mart, Bloomingdale's, Saks Fifth Avenue, Macy's, Sephora, GNC, CVS, Rite Aid, Walgreen's

## Who the heck is Basic Research

In our Cosmetic area we have many brands and products you may or may not have heard of such as:



Klein-Becker



Bremenn Research Labs

Product names like the Strivectin line, Hylexin for Dark Circles, and so many more.

# Who the heck is Basic Research

Product names like, Jillian Michaels Calorie control and fat burner, Zantrex-3, Relacore for “belly fat”, Thyrostart, Oxydrene , and so many more.



Carter-Reed



Zoller Labs



Generix Labs



Other Dietary Supplements



ThinCare International

**BASIC**  
RESEARCH



BLACK BOX  
AI PLM

# PLM “Blackbox”

## Why did we choose ARAS PLM

In looking at SAP, Oracle, and subsequently Aras we found that they are all somewhat akin to a toolkit but ARAS stood out from the onset in the selling cycle and pitch in that from top to bottom they weren't just salespeople followed separately by implementation people who cleaned up what the salespeople misunderstood or simply overpromised they understood PLM !!

Each person we encountered knew PLM and the ARAS product very well which meant we knew we were getting a solution that would fit our business vs. make our business fit a predefined idea of someone else's PLM plan which can work but may be painful to force into the business.



# PLM “Blackbox”

## Why did we choose ARAS PLM

Basic Research is a unique company according to our users  
(much like your users)

Uniqueness requires more flexibility in the software of  
choice

With the other vendors; Oracle, SAP and others the  
software was “predefined” locking us into their pre-  
configured processes etc

Aras allows us to flex where needed

# PLM “Blackbox”

## What we found it IS NOT

This is not your average PLM system ...

Ways we have tried to describe ARAS PLM :

- 1) Development Kit (NO. It's not all that technical)
- 2) Lego Blocks (NOT REALLY. Simple and with enough pieces virtually anything can be made)
- 3) Large Erector Set (NO ... it's not all individual pieces)

ARAS PLM has Out-Of-The-Box Functionality with pre-built time saver tools and much more





# PLM "Blackbox"

## How we look at ARAS and describe it to newbies:

If not going to use Out-Of-The-Box PLM functionality (and we weren't), then here's how we describe it ...

Paramount to getting Microsoft Excel (YES)

- 1) You have a work space and can create your own re-usable templates
- 2) End users can be protected from themselves with edits and conditional what if's !!
- 3) You get to paint your forms and screens with only the fields you want and need
- 4) Basically you get all that you could ever want for anything you want to build ... be careful and start small building in phases



## Now ARAS PLM as a “blank Spreadsheet !

This is a good thing, but now how do you go about moving forward with your system:

- 1) Pick a solid diverse set of users that really KNOW the daily usage of what your trying to deliver  
(They cannot be only Mgmt. that knows how it “should” work)
- 2) Next, for each area you are going to have document a “Day in the Life” for the roles to use the system. This entails daily, weekly, monthly and periodic functions.

This is the meat and potatoes of your efforts because from these you will define :

- \* Data Types to map out
- \* Roles of users and relationships
- \* Forms / Fields
- \* Views that are needed

Last, from this you get to define your project phases and split out the work to various people, teams and users

## Now ARAS PLM as a “blank Spreadsheet !

One of our largest lessons was to ensure IT owned the Data Loads and can run this on a periodic basis ensuring the data types and loads continue to work as needed because you will have to switch from a “test system” with all the garbage you have in it to just the data set and functions, workflows, fields, forms, views, and lifecycles needed !!

So what would we do differently ?



AREA Identifier:						
Test Group#	Area Seq #	Test / Task Description	Freq.	Contact	T.C. Compl.	Comments
IT	8	New Vendor Setup (Vendor Access)	M			
IT	9	Login setup / test of external vendor	M			
IT	10	Substitute Vendor Setup	M			
IT	11	Login setup / test of substitute vendor for an item	M			
IT	13	Change Control - Name Change	M			
IT	18	Create a display kit (individual Units)	W			
IT	19	Create a display kit	W			
IT	21	Create UOM Kit (Master Pack)	W			

## DIL Toolset

By Dept. start with list tracking then actual broken out test cases

PLM----- > "Test Scripts"				
Business Process		Script ID#:		Map ID:
Predecessor Scripts:		Successor Scripts:		
Prepared By:		Last Update:	99/99/9999	
Test Description:				
Data Used:				
Prerequisites:				
"Functional" Activity				
Description :				
#	Step	Expected Results	Actual Results	Pass/Fail
11				
12				
13				

## DIL Toolset

Each Test case is written up with samples of current forms, fields, reports

## So what would we do differently ?



After you have test cases you can then layout your data model which will allow for a recursive discussion and decisions on Phases

This is key as you cannot do it all at once so keep your workflow simple if possible then add to it

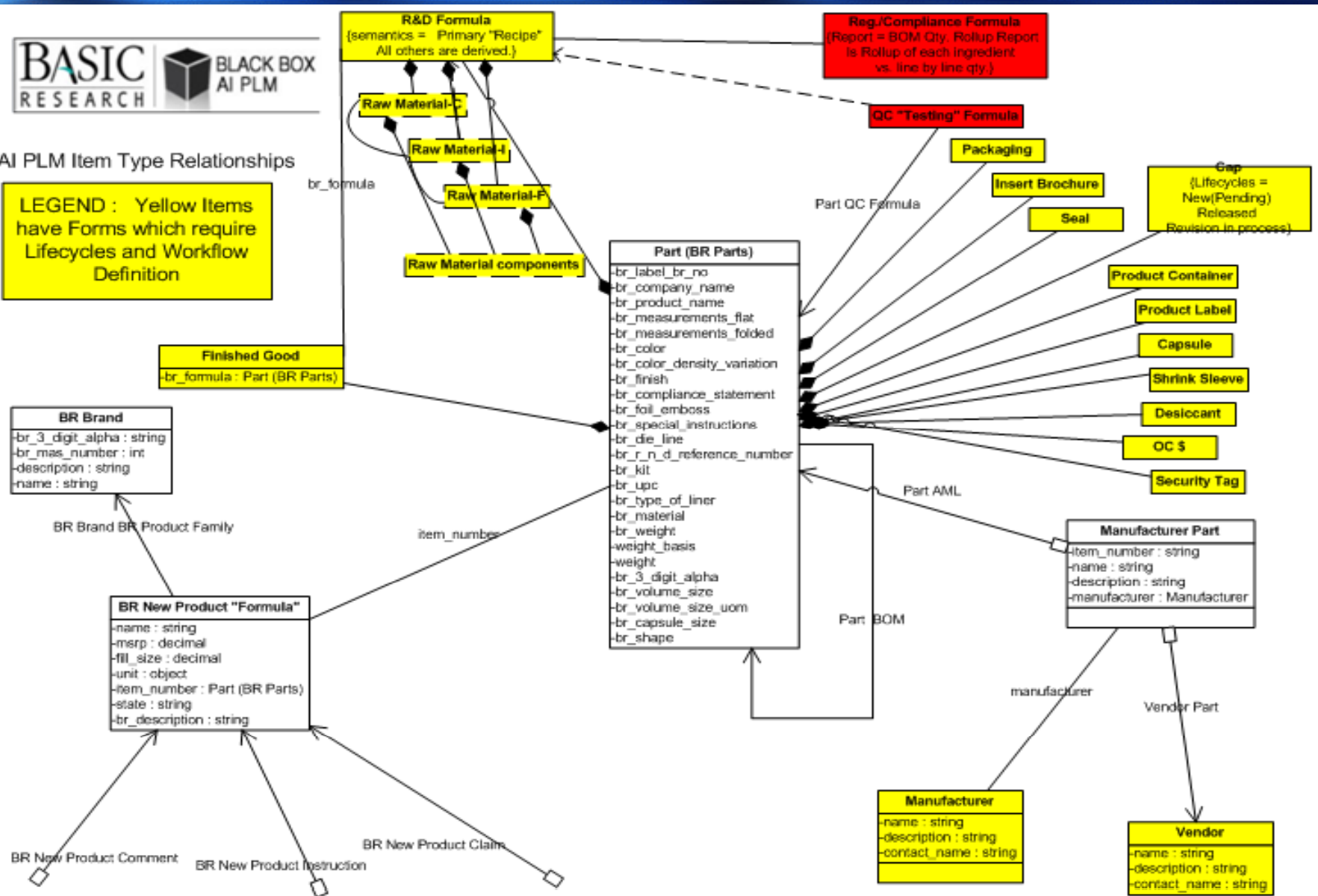
Your users will not be able to handle all the change and the learning

## Phases Defined

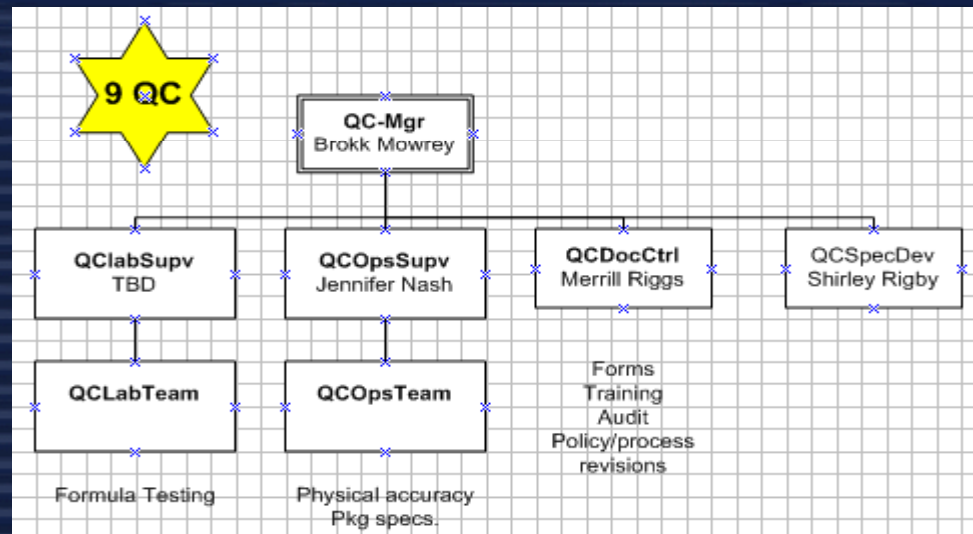
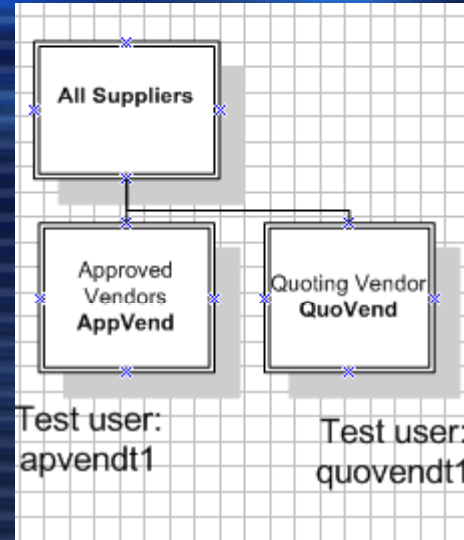
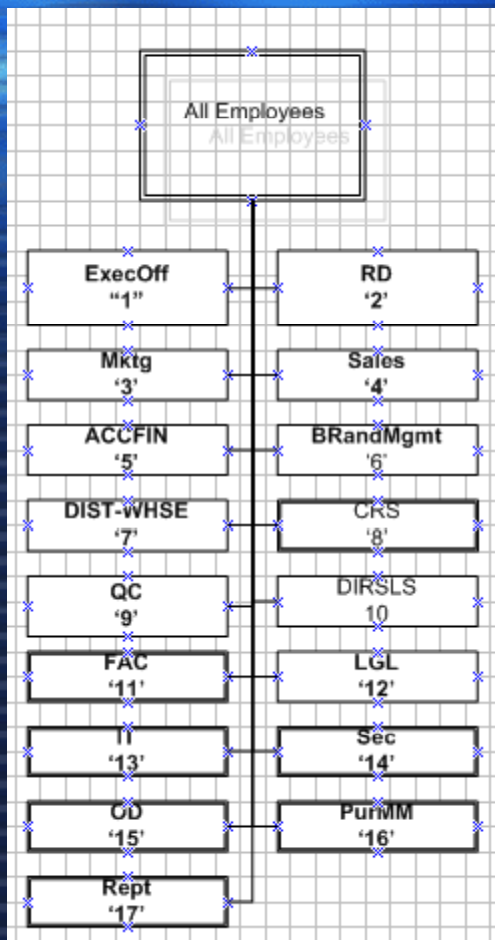


AI PLM Item Type Relationships

**LEGEND :** Yellow Items have Forms which require Lifecycles and Workflow Definition



Document the fields and attributes for interfaces, loads and forms all at once...



## Roles & Structure for permissions



## So How to move forward ?

What makes us different than your organization and what makes us the same. I'm sure most of us have parts, components, subcomponents, and BOM / Finished Goods.

A key item for us is our "Recipe's, Formulas, and QC formula variances. ARAS PLM allows us to go to this level AND lets us connect our vendors in and notify them on change thus holding them accountable for accuracy at all times.

FORMULA CARD							FINAL APPROVAL	
							Nathalie:	
							Amy H:	
Product Name:	Bremenn Lifting and Firming Cream					Functional Ingredients: 4% Polylift EL and 2.5% Essens		
Formula Number:	RD06145-3							
Packaging Type:						Date:	5/15/09	
Net Content/Volume:						Developer:	Gordon # G26-24-B	
Trade Name	Supplier	REGULATIONS	INCI Name	CAS #	% Breakdown	Raw Mat'l %	Finished Product %	
Purified Water USP Grade	In-House	Preferred Supplier	Water (Aqua)	7732-18-5	74.04500%	100.00000%	74.04500%	
Pemulen TR-1 Polymer	Noveon				0.20000%	100.00000%	0.20000%	
Versene Na2 Crystals	Dow Chemical	Preferred Supplier	Disodium EDTA	139-33-3	0.05000%	100.00000%	0.05000%	
		Preferred Supplier; consistent % required	Glycerin	56-81-5		99.70000%	1.99400%	
Glycerin 99.7 USP	LA Chemical		Water (Aqua)	7732-18-5	2.00000%	0.30000%	0.00600%	
			Panthenol	16485-10-2		50.00000%	0.02500%	
			Water (Aqua)	7732-18-5		49.30000%	0.02465%	
			Citric Acid	77-92-9	0.05000%	0.70000%	0.00035%	

Just be sure to keep your initial workflows, forms, views, lifecycles, and reports SIMPLE. You can add more complexity after you ensure your basics are right.

# Start your Day in the Life Labs (DIL)

Now you have forms, views, some workflow, and you've been working up everything to run your DIL ...Start running your DIL

You WILL possibly fail quite miserably only getting thru a small percentage of one test even !!

Be patient as the first week you should plan as a write-off !

By the second week however you'll start getting some real results

During DIL you will build your documentation and training materials for each department and also assign general overview training to someone

# Run at least 4 real weeks of DIL and keep grades @ wk 2

## DIL Toolset -- Report Card

This can be used periodically to keep competition and awareness high across teams. Print it /Mail it but keep visibility high and you will drive results.

Primary		Area - Team	<i>Data Load Accuracy Overall</i>	<i>Progress &amp; Milestone Status so far</i>	<i>Quality of test script writeups</i>	# of test for /Area	<i>Wk 1 Load 25 - 25 Pass/Fail %</i>
Last	First		Mgr.	DD Grade	DD Grade		
		PurMM				36	I
		Item Mgmt (ITM)				24	
		Brand Mgmt. (BM)				36	A
		MKTG.				15	I

Grades and colors just like in School (it is psychological)

## When you are getting solid grades !

Begin ensuring each user for your first phases has their client connect properly to each environment

Setup easy links for them

Run Overview general training to teach them using the system for basics

- \* Wildcard searches
- \* Menu use
- \* Create an item
- \* Appended searches
- \* Where used
- \* Version and item comparisons
- \* How to review workflow and update an activity



## When you are getting solid grades !

Plan your go live final date and get your production and staging environments synced up

Go Live (Be sure ARAS Support and Implementation are in the loop with where you are at, they are superb)

### Post Go Live

- Expect “tweaks”

- Ensure you have daily stand-ups for a period of time

- Setup Key or power users by area

Do this every time !

From the beginning be sure you have at least 2 environments and really recommend 3:

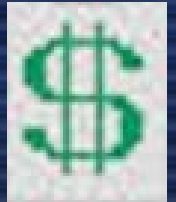
- Test/Dev –
- Staging-
- Production –

•What would you do if you needed to test a new O/S and your production was on 9.1 sp 7 and you wanted to test out going to 10.x sp x



## Our Win List with ARAS PLM

- \* Total user team buyin and coordination from the start
- \* Excellent ARAS Implementation help
- \* Top support by ANY of our software vendors
- \* Easy UI with Rollover Graphics describing functions
- \* Per User memory of look/feel
- \* Easy extraction to excel / word for reports
- \* Vendor access for specs and accountability
- \* Workflow specific permissions to limit who can release / change specs
- \* Role based user permissions/workflow
- \* We can add more process and workflow based on needs.
- \* Views based on Role
- \* "Where Used" will ensure more accurate Change control so items are not missed



## Our Win List with ARAS PLM

- \* Version control is automatic with tracking of changes/audit trail and the ability to compare two versions.
- \* Viewing/access restricted by role
- \* Can use alternate approved vendors
- \* Users will be able to view progress of a workflow and any approvals //
- \* Tasks and details will have simple check-off to show complete (with many details to ensure we remember the small stuff)





What's Left Mr. Wizard  
For us... many phases

