



## Complete Pre- and Post-Release Task

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### 1.0 **PURPOSE**

This procedure defines the requirements for completing Pre- and Post-Release tasks.

### 2.0 **REFERENCES**

#### 2.1 **Applicable Documents**

| Number | Title   |
|--------|---|
| 87131  | Guide for Completing Pre- and Post-Release Task |

#### 2.2 **External References**

| Number | Title |
|--------|-------|
| N/A    | N/A   |



## Complete Pre- and Post-Release Task

### 3.0 RESPONSIBILITIES

| Function or Title       | Responsibility  |
|-------------------------|---|
| Change Manager (CM)     | <ul style="list-style-type: none"> <li>Create and manage the Change Order.</li> <li>Creates manual Pre- and Post-Release Adhoc Tasks</li> </ul> |
| Pre-Release Task Owner  | Completes the assigned Pre-Release tasks (e.g., SAP updates, Translations)  |
| Post-Release Task Owner | Completes the assigned Post-Release tasks (e.g., Update LMS, Document Distribution, GUI updates)  |

### 4.0 DEFINITIONS

| Term                 | Definition   |
|----------------------|--|
| Change Activity (CA) | A change implementation activity used to assign tasks for individuals to complete and be reviewed prior to Change Implementation Board review.   |
| Change Order (CO)    | An object that allows planning, managing, monitoring, and approval of new/revised objects of the change activities.  |
| Pre-Release Task     | Windchill generated tasks defined from the objects types, attributes, states, and task determination questions upon approval of the Change Order. Tasks must be completed prior to release of the Change Order.                    |
| Post-Release Task    | Windchill generated tasks defined from the objects types, attributes, states, and task determination questions upon release of the Change Order. Tasks are completed after Change Order release but before Change Order is Closed. |
| Windchill (WC)       | Product Lifecycle Management (PLM) system used to manage objects associated with the lifecycle of a product from its conception to its obsolescence.   |

### 5.0 FLOW CHART

N/A



## Complete Pre- and Post-Release Task

### 6.0 REQUIREMENTS

#### 6.1 Pre-Release Task

| Step | Action  |
|------|---|
| 1    | Windchill generates a Pre-Release Task after Change Order (CO) approval. A Pre-Released Task is automatically generated by the workflow based on the object types, attributes, states, and task determination questions. See Appendix A and C for WC Generated Pre-Release Tasks. |
| 2    | Task Owners will receive an email notification when a task is assigned. The assigned tasks are also under My Tasks on the WC Home Page.   |
| 3    | Review the instructions in the task to determine the work to be completed.  |
| 4    | Document that the task has been completed.  |

#### 6.2 Post Release Task

| Step | Action   |
|------|--|
| 1    | Windchill generates a Post-Release Task after Change Order is Release. Post-Released Task is automatically generated by the workflow based on the object types, attributes, states, and task determination questions. See Appendix B for WC Generated Post-Release Task. |
| 2    | Task Owners will receive an email notification when a task is assigned. The assigned tasks are also under My Task on the WC Home Page.   |
| 3    | Review the instructions in the task to determine the work to be completed.   |
| 4    | Document that the task has been completed.   |

#### 6.3 Manual Pre- and Post-Release Tasks

| Step | Action   |
|------|--|
| 1    | <p>CM may manually create additional Pre- and Post-Release tasks, using Create Pre-Release Ad hoc Task or Create Post-Release Ad hoc Task.</p> <p>Refer to Appendices D and E for list of manually created Pre- and Post-Release Tasks.</p> <p>For the Master Data (ZFIN) tasks listed in Appendix D, task IDs 1-6 need to be completed before ID 7 begins, and ID 8 will begin after ID 7 is completed. Predecessor IDs need to be listed in the Predecessors column as shown in Appendix D.</p> <ul style="list-style-type: none"> <li>87131 Completing a Pre- and Post-Release Task</li> </ul> <p><b><u>NOTE:</u> CM can copy tasks from Appendix D and E and paste into Windchill.</b></p> |



## Complete Pre- and Post-Release Task

### 7.0 **APPENDICES**

Appendix A: WC Generated Pre-Release Tasks

Appendix B: WC Generated Post- Release Tasks

Appendix C: WC Generated Non-Rev Pre-Release Tasks

Appendix D: Manually Created Pre-Release Tasks

Appendix E: Manually Created Post-Release Tasks



## Complete Pre- and Post-Release Task

### **APPENDIX A: WC GENERATED PRE-RELEASE TASKS**

| Task  | Assignee                        | Reviewer                        |
|---|---------------------------------|---------------------------------|
| Attach BOM Print from SAP to the Drawing                                | Change Specialist               |                                 |
| Changes Impacting ZCONFIGLABEL in ERP                                   | Informatica/Labeling Specialist |                                 |
| Create Document Translation - Brazil                                    | Brazil Doc Services             |                                 |
| Create Document Translation – Costa Rica                                | Costa Rica Doc Services         |                                 |
| Create Pre-Release Ad hoc Tasks   | Change Manager                  |                                 |
| Create Training Task(Puerto Rico)                                       | Puerto Rico Doc Services        |                                 |
| Finalize MES Setup  | MES site teams                  |                                 |
| Finance Implement ERP Changes   | CIB - Finance                   |                                 |
| GTIN Assignment   | UDI Specialist                  |                                 |
| Implement CAD Changes   | CIB - CAD                       |                                 |
| Implement Change to MfgPro  | Change Specialist               |                                 |
| Implement Changes Impacting InforEAM or CMMS                            | CIB - Preventive Maintenance    |                                 |
| Implement Changes Impacting Informatica                                 | Informatica/Labeling Specialist | CIB - Regulatory Affairs        |
| Implement Changes Impacting Packaging Validation Configurator ZPVCFIG01 | Change Specialist               | CIB - Manufacturing Engineering |
| Implement Changes Impacting Repack Rules Configurator in SAP            | CIB - Planning                  |                                 |
| Implement Changes Impacting Shelf Life Extension ZSLEXTCONFIG01         | Change Specialist               | CIB - Manufacturing Engineering |
| Implement Changes Impacting ZLSDMANUAL table in ERP                     | Change Specialist               | Change Specialist               |
| Implement Changes to eIFU Website                                       | CIB - Regulatory Affairs        |                                 |
| Implement ERP Routing Changes   | Change Specialist               |                                 |
| Implement Part Changes/Update ERP                                       | Change Specialist               |                                 |
| Inactive Time Flag  | Change Specialist               |                                 |
| Initiate PRA Process  | Regulatory Operations           |                                 |
| LMS Setup Pre-Release   | LMS Administrator Team(s)       |                                 |
| Manufacturing Engineering to Complete SAP Fields Spreadsheet            | CIB - Manufacturing Engineering |                                 |
| Packaging Engineering to Complete SAP Fields Spreadsheet                | CIB - Packaging Engineering     |                                 |
| Production Planning Implement ERP Changes                               | CIB - Planning                  |                                 |
| Purchasing Implement ERP Changes  | CIB - Purchasing                |                                 |

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## Complete Pre- and Post-Release Task

| Task  | Assignee                         | Reviewer |
|---|----------------------------------|----------|
| Released/Supersede Status for ZMOD                    | Library Admin                    |          |
| Retype and Move a Document to the Appropriate Library | Library Admin                    |          |
| Set Scheduled Release Date                            | Change Manager                   |          |
| Supplier Development Quality Implement ERP Changes    | CIB - Supplier Quality Assurance |          |
| Update Label System (non-enLabel)                     | CIB - Labeling                   |          |
| Update Production Aid                                 | Process Trainer                  |          |
| Update Video Training Aid                             | Video Base Team                  |          |

### APPENDIX B: WC GENERATED POST-RELEASE TASKS

| Task                             | Assignee                  |
|----------------------------------|---------------------------|
| Create Post-Release Ad hoc Tasks | Change Manager            |
| LMS Setup Post-Release           | LMS Administrator Team(s) |

### APPENDIX C: WC GENERATED NON-REV PRE-RELEASE TASKS

| Task                              | Assignee          |
|-----------------------------------|-------------------|
| Implement Document Changes        | Change Specialist |
| Implement Part Changes/Update ERP | Change Specialist |
| Succeed latest Released history   | Library Admin     |



## Complete Pre- and Post-Release Task

### APPENDIX D: MANUALLY CREATED PRE-RELEASE TASKS

| ID                            | Activity Name                                      | Assignee                     | Instructions  | Duration<br>(Days<br>Due) | Predecessors<br>(ID #) |
|-------------------------------|--|------------------------------|---|---------------------------|------------------------|
| <b>For Master Data (ZFIN)</b> |  |                              |   |                           |                        |
| 1                             | Quality Engineering<br>Implement ERP Changes       | CIB - Quality<br>Engineering | Complete the required functional area fields per 87274, SAP Master Data Field Task List.  | 2                         |                        |
| 2                             | Supply Chain- All<br>Implement ERP Changes         | CIB - Supply<br>Chain        | Complete the required functional area fields per 87274, SAP Master Data Field Task List.  | 2                         |                        |
| 3                             | Logistics Implement ERP<br>Changes                 | Eric Feig<br>Andreas Mees    | Complete the required functional area fields per 87274, SAP Master Data Field Task List.  | 2                         |                        |
| 4                             | Finance- Global<br>Implement ERP Changes           | Nate Baraga                  | Complete the required functional area fields per 87274, SAP Master Data Field Task List.  | 2                         |                        |
| 5                             | Trade Implement ERP<br>Changes                     | Ann Olson                    | Complete the required functional area fields per 87274, SAP Master Data Field Task List.  | 2                         |                        |
| 6                             | Tax Implement ERP<br>Changes                       | Ana Nelson                   | Complete the required functional area fields per 87274, SAP Master Data Field Task List.  | 2                         |                        |
| 7                             | Finance - Ops (Cost Roll)<br>Implement ERP Changes | CIB - Finance                | Complete the required functional area fields per 87274, SAP Master Data Field Task List.  | 2                         | 1,2,3,4,5,6            |
| 8                             | Data Governance Final<br>Review                    | Tim<br>MacMurdo              | Complete the required functional area fields per 87274, SAP Master Data Field Task List.  | 2                         | 7                      |
| <b>For Change Specialist</b>  |  |                              |   |                           |                        |
| 9                             | Implement Receiving<br>Inspection Plan Changes     | Change<br>Specialist         | Create/Update RIP   | 2                         |                        |
| 10                            | Costa Rica - Implement<br>Update ERP               | Change<br>Specialist         | <ul style="list-style-type: none"> <li>• Create/Update Receiving Inspection</li> <li>• Create/Update Material Master (data that is not integrated)</li> <li>• Create/Update Doc Info Records</li> <li>• New Releases, Create Inspection Plan QP02</li> <li>• MP and IP, add /replace PRT</li> </ul> | 2                         |                        |
| 11                            | Puerto Rico - Implement<br>Update ERP              | Change<br>Specialist         | <ul style="list-style-type: none"> <li>• Create/Update Receiving Inspection</li> <li>• Create/Update Material Master (data that is not integrated)</li> <li>• Create/Update Doc Info Records</li> <li>• New Releases, Create Inspection Plan QP02</li> <li>• MP and IP, add /replace PRT</li> </ul> | 2                         |                        |

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## Complete Pre- and Post-Release Task

| ID | Activity Name  | Assignee          | Instructions  | Duration<br>(Days<br>Due) | Predecessors<br>(ID #) |
|----|--|-------------------|---|---------------------------|------------------------|
| 12 | Create/Update Document Translations for Quality System | Change Specialist | Create/Update Document Translations for Quality System Procedures | 2                         |                        |

## APPENDIX E: MANUALLY CREATED POST-RELEASE TASKS

| ID | Activity Name          | Assignee             | Instructions                             | Duration<br>(Days<br>Due) | Predecessors<br>(ID #) |
|----|------------------------|----------------------|--|---------------------------|------------------------|
|    | LMS Setup              | LMS Administrator    | Complete LMS Setup per Change Order      | 2                         |                        |
|    | Distribution Book      | Book Owner           | Update Distribution Book                 | 2                         |                        |
|    | Update GUI             | CIB – Quality System | Update GUI per Change Order              | 2                         |                        |
|    | Finance Cost – NM only | CIB - Finance        | Update Finance Tab as appropriate in SAP | 2                         |                        |