



TEAMCENTER

Master Document Register and Transmittal — Deployment

Teamcenter 2412

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1. Installing and Configuring Master Document Register and Transmittal (MDR&T)

What is Master Document Register and Transmittal?

The *Master Document Register* (MDR) is an agreed list of deliverables in the form of documents that are associated with a contract between a customer, a vendor, or an external party for a program or a project. These documents must be delivered at various stages of the project for review and approval and for sharing information.

The process of exchanging information and submitting these deliverable documents to external stakeholders namely, the customers, vendors, or external parties is termed as the *Transmittal* process.

Consider an example of a vertical progressive cavity pump system that must be constructed as part of a contract between an owner/operator (O/O) and an engineering, procurement, and construction company (EPC).


The EPC agrees to submit the deliverable documents listed from various departments and disciplines. The mechanical department must submit the valve schedule and the electrical & instrumentation department must submit the material certificates for the design and construction of the pump system for the O/O's approval.

These deliverable documents become part of the MDR. When the EPC submits the MDR in Teamcenter, the O/O reviews the various engineering aspects of the system, the fabrication and erection process, instrument selection, and electrical components. In doing so, they monitor the engineering, procurement, construction, quality, and safety of the pump system. They also track the progress in relation to the project schedule in Teamcenter.

Install Master Document Register and Transmittal using Deployment Center

Add Master Document Register and Transmittal to your existing Teamcenter environment through a series of tasks from selecting the application and entering configuration parameters to generating and running deployment scripts.

Procedure

1. Log on to Deployment Center and select the environment to which you want to add Master Document Register and Transmittal.
2. Go to the **Applications** tab. Click **Add or Remove Selected Applications** .

- In the **Available Applications** panel, use the web browser search to find the **Master Document Register and Transmittals (MDR&T)** application and select it.

Deployment Center automatically selects any additional dependent applications.

- Select the following required applications manually.

- **Assignment Matrix Active Workspace**
- **Active Workspace Master Document Register and Transmittals (MDR&T)**
- **Rules of Credit Active Workspace**
- (Optional) **MDR&T and IPP&E Interface**
- (Optional) **Requirements Management**

- Click **Update Selected Applications**.

- Choose **Go to Components > Go to Deploy > Generate Install Scripts** to generate deployment scripts you will use to update affected machines.

When script generation is complete, note any special instructions in the **Deploy Instructions** panel.

- Locate deployment scripts, copy each script to its target machine, and then run each script on its target machine.

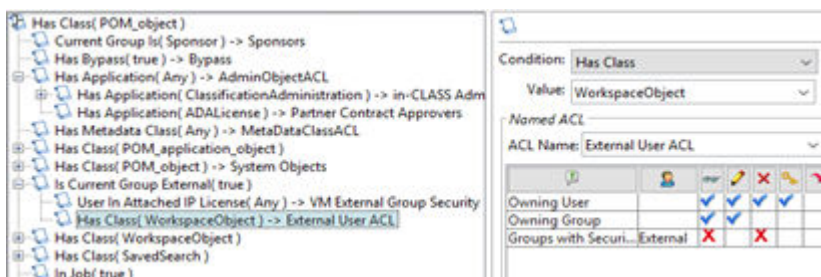
For more information about running deployment scripts, see *Deployment Center — Usage*.

Post Installation Prerequisites

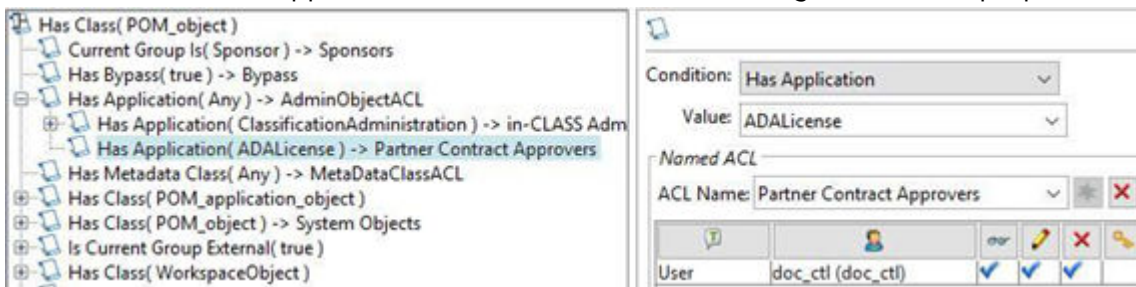
Update access control

- Open the Teamcenter command prompt as an administrator, run the following command as a DBA user and confirm that the access control list (ACL) rule tree is updated.

```
vm_install_am_rule.exe -u=<user_id> -p=<password> -g=dba -mode=install.
```



- Log on to Teamcenter as an administrator (DBA Role) and open **Access Manager**. You need to configure the user of the organization who is authorized to approve Partner Contracts. As an example, the below image shows *doc_ctl* who is the *Document Controller* who is authorized to approve the Partner Contracts. role configured for that purpose.

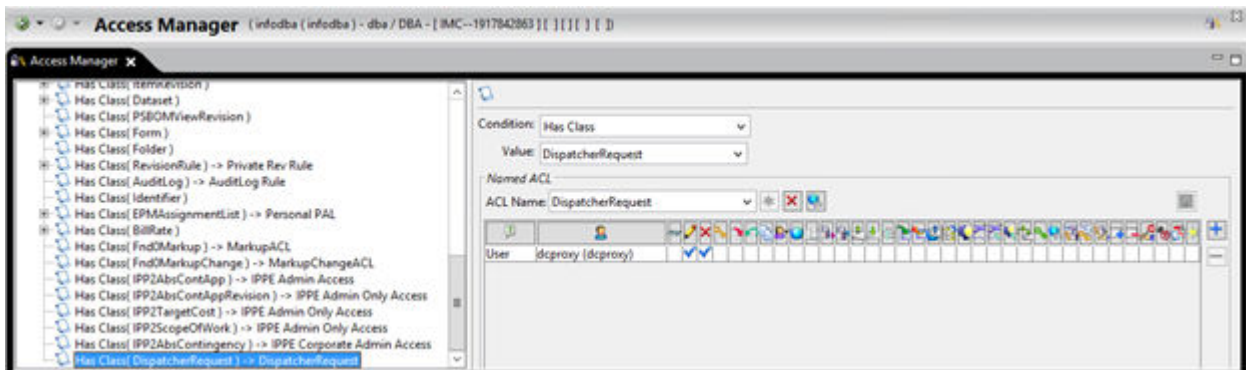


- Create the ACL and add it to the rule tree.

Set up background processing for workflows

After configuring the translator for the dispatcher, as part of the post-configuration tasks, perform the following steps:

- In Access Manager, create an access control list (ACL) named **DispatcherRequest**, add the newly created **DispatcherRequest** ACL under Has Class (POM_application_object) > Working branch in **Access Manager**.



- In Organization, update the **Site Node/URL** and **SOA URL** to the web-tier Teamcenter URL.
- To view the the site ID, go to **My Teamcenter**. The site ID is displayed in user settings.



Set email preferences

1. In the **Mail_server_name** preference value, enter the name of the email gateway server. The server must be running a **sendmail** daemon. The name can be a text string or a numeric IP address.
2. Set the **Mail_internal_mail_activated** preference value to **false**.
3. Set the **Mail_server_port** preference value to **25**.
4. Set the **Mail_server_charset** preference value to **windows-1252**.
5. Set the **Mail_send_file_attachments_activated** preference value to **true**.
6. Set the **Mail_OSMail_activated** preference value to **true**.
7. In the Site Time Zone preference value, enter the server's time zone identifier in the format region/city, for example, *America/New_York*.

Set Microsoft Excel template rules

To enable content downloads for the users, ensure that the Excel Template Rules property includes the values **apply_packing** and **include_attachments**.

- **MDR_Content_Download_MDRDEL_Template**
- **MDR_Content_Download_WP_FWP_Template**
- **MDR_Content_Download_Template**
- **Transmittal_Content_Download_MDRDEL_Template**
- **Transmittal_Content_Download_WP_FWP_Template**

Configuring Master Document Register and Transmittal (MDR&T) using workflow process templates

About configuring Master Document Register and Transmittal using workflow process templates

Teamcenter provides you with preconfigured workflow templates to run the Master Document Register and Transmittal (MDR&T) business processes. You can modify these configurations as per your business needs. The workflow templates available with the MDR&T installation are necessary for reviewing the MDR deliverables and for transferring data for review between the various stakeholders.

Set up a workflow to review the MDR structure

You can set up a workflow to review the MDR structure by using the **MDT Content Review Process** template. This workflow releases the MDR revision and the BOM view revision of the structure.

Workflow Initiator	Target Object Type
Document controller	Master Document Register Revision

The following table describes the tasks in the workflow.

Workflow task	Description	Task assigned to
Review the MDR structure	This task is assigned to internal or external reviewers before the deliverable review process is initiated. The MDR structure is frozen.	Internal or external reviewers
Update the MDR structure	This task is assigned to the document controller for updating the MDR structure based on the comments received from the reviewers.	Document controller

Set up a workflow to review the deliverable process

You can set up a workflow to review the deliverable process by using the **MDT Deliverable Review Process** template. This template is used for internal reviews before sharing the deliverables with external reviewers. This template also provides an option for a collaborative review of the deliverable with the team.

Workflow initiator	Target object type
Document controller or program manager	MDR Deliverable Revision or WBS Element Revision or Functional Work Package Revision

Workflow task	Description	Task assigned to
Add or update documents	This task is assigned to the responsible user, defined in the assignment matrix, to add or update deliverable instances to deliverables.	Responsible user or process owner
Internal Discipline Review	This task is assigned to internal reviewers, from the same discipline, to review deliverable instances submitted for deliverables.	Internal discipline reviewer
Squad Check Required?	This task is assigned to the proposed responsible party to decide whether a collaborative review by the team must be done.	Process owner or proposed responsible party
Internal Multi Discipline (Squad Check) Review	This task is assigned to internal reviewers across multiple disciplines to review deliverable instances on deliverables.	Reviewers across disciplines

Set up a workflow to manually review the deliverable process

You can set up a workflow to review the deliverable process by using the **MDT Deliverable Review Process** template. This template is used for internal reviews before sharing the deliverables with external reviewers. This template also provides an option for a collaborative review of the deliverable with the team.

Workflow initiator	Target object type
Document controller or program manager	MDR deliverable revision or WBS element revision or functional work package revision

Workflow task	Description	Task assigned to
Assign discipline	This task is assigned to the process owner who must propose a user as the responsible party.	Process owner
Add or update documents	This task is assigned to the responsible user as defined in the assignment matrix to add or update deliverable instances to deliverables.	Responsible user or process owner
Internal discipline review	This task is assigned to internal discipline reviewers to review deliverable instances submitted for deliverables.	Internal discipline reviewer
Squad check required?	This task is assigned to proposed responsible party to decide whether Squad Check should be done or not.	Process owner or proposed responsible party
Internal multi discipline (squad check) review	This task is assigned to multi discipline reviewers to review deliverable instances on deliverables.	Reviewers across disciplines

Set up a workflow to review deliverable instances

You can set up a workflow to review the deliverable process by using the **MDT Deliverable Instances Review Process** template. This template is used to review deliverable Instances by internal discipline leads before sharing it with external reviewers. This template also provides an option for squad check on deliverables to review.

Workflow initiator	Target object type
Document controller or program manager	Workspace object

The following table describes the tasks in the workflow.

Workflow task	Description	Template Actor
Update deliverable instances	This task is assigned to the responsible user defined in the assignment matrix to add or update deliverable instances to deliverables.	Responsible user or process owner
Internal discipline review	This task will be assigned to internal discipline reviewers to review deliverable instances submitted for deliverables.	Internal discipline reviewer
Squad check required?	This task will be assigned to proposed responsible party to decide whether Squad Check should be done or not.	Process owner or proposed responsible party
Internal multi discipline (squad check) review	This task will be assigned to multi discipline reviewers to review deliverable instances on deliverables.	Reviewers across disciplines

Set up a workflow to submit transmittals for external review

You can set up a workflow to review the deliverable process by using the **MDT Outgoing Transmittal Review Process**. This template is used to submit transmittal for external review. Assignees for the tasks are selected automatically from the assignment matrix, if configured. The progress on the deliverables for transmittal is updated if Rules of Credit (RoC) is configured.

Workflow Initiator	Target Object Type
Document Controller	Transmittal Revision

The following table describes the tasks in the workflow.

Workflow task	Description	Template Actor
External Review	This task is assigned to external reviewers or users with a partner role to review the deliverable instances and submit a transmittal response for each deliverable instance.	External reviewers or partner users
Release Document - Outgoing	This is assigned to the process owner for checking the responses from external reviewers for the deliverable instances. In the case of rejections, the document controller can manually revise the deliverable instance and submit it for review again.	Process owner

Set up a workflow to review partner user transmittal

You can set up a workflow to review the deliverable process by using the **MDT Partner User Transmittal Review Process** template. Business users can use this template to upload deliverable instances and get these reviewed by reviewers from the same discipline. Assignees for the tasks are selected automatically from the assignment matrix, if configured. The progress on the deliverables for transmittal is updated if Rules of Credit (RoC) is configured.

Workflow initiator	Target object type
External user	Transmittal revision

The following table describes the tasks in the workflow.

Workflow task	Description	Task assigned to
Add or replace the documents	This task is assigned to external users to add or replace the deliverable instances to deliverables.	Process owner
Acknowledge documents for upload of files	This task is assigned to the process owner to acknowledge that the required files are uploaded to the deliverable instances.	Document controller
Internal review discipline	This task is assigned to internal reviewers from the same discipline to review the deliverable instances and generate transmittal response and markup.	Internal discipline reviewers
Release documents	This task is assigned to the document controller to verify the responses for the deliverable instance from the internal reviewers in the same discipline. In the case of rejections, the document controller manually can revise the deliverable instance and submit the deliverable instance again for review.	Document controller

Set up a workflow to review the content load request

You can set up a workflow to review the content load request by using the **MDT Content Load Request** template. This template is used to load the MDR Content.

Workflow initiator	Target object type
Any user	Content load request revision

The following table describes the tasks in the workflow.

Workflow task	Description	Task assigned to
Want to Proceed?	This task is assigned to the workflow initiator to reconfirm if they want to continue with the processing content load request despite soft errors in the input files.	Process owner
Review Content Load Request	This task is assigned to the document controller to review the submitted content load request for the MDR. If approved, the content provided by the user will be uploaded to the MDR. If rejected, the content is not uploaded to the MDR.	Document controller

Configuring mapping files for content load

Content load facilitates a user to upload the documents to multiple deliverables instead of the manual process of creating and updating each document. Content load also helps users to upload and replace files in the created and existing documents of deliverables

Mandatory Columns – Type, Relation and File Name columns

The below five columns are mandatory and must exist with data in the mapping file in the below sequence:

- Tc_Primary_Type

This column represents the primary item type. e.g., *Wbs0ResourcePkg*

- Tc_Relation_1

This column represents the relation type of primary with secondary. e.g. *Wbs0HasDeliverables*

- Tc_Secondary_Type

This column represents the secondary item type. e.g. *Document*

- Tc_Relation_2

This column represents the relation type of secondary with dataset. e.g. *TC_Attaches*

- Tc_File_Name

This column represents the file name that user wants to upload.

Tc_Primary_Type	Tc_Relation_1	Tc_Secondary_Type	Tc_Relation_2	Tc_File_Name
Wbs0ResourcePkg	Wbs0HasDeliverableRel	Document	TC_Attaches	Commissioning Schedules1.docx

Optional Column – Revision ID columns

Below are two optional columns that will be applicable only if Primary or Secondary types are sub-types of the item that a user can add in the mapping file to point the specific revision of primary and secondary Item Type if needed:

- Tc_Primary_Rev_ID

This column represents the primary item revision ID. For example, "A", must be present between Tc_Primary_Type and Tc_Relation_1 column

- Tc_Secondary_Rev_ID

This column represents the secondary item revision ID e.g. "A", it must be present between Tc_Secondary_Type and Tc_Relation_2 column

Tc_Primary_Type	Tc_Primary_Rev_ID	Tc_Relation_1	Tc_Secondary_Type	Tc_Secondary_Rev_ID	Tc_Relation_2	Tc_File_Name
Wbs0ResourcePkg	A	Wbs0HasDeliverableRel	Document	A	TC_Attaches	Commissioning Schedules1.docx

If you are using above two columns in the mapping file then they should also be present in the mapping preference for their respective types.

Preference for Primary Type columns

Below is an example for the primary columns in the CSV for *Wbs0ResourcePkg* type:

Tc_Primary_Type	WBS Number	FWP Name	Tc_Primary_Rev_ID	Work Effort	Tc_Relation_1
Wbs0ResourcePkg	1.2.1	Block Flow Diagrams	A	960	Wbs0HasDeliverableRel

The additional columns between Tc_Primary_Type and Tc_Primary_Rev_ID represents the properties on Item type mentioned in Tc_Primary_Type. i.e. in above example, 'WBS Number' column represents 'wbs0Number' property on *Wbs0ResourcePkg*

The additional columns between Tc_Primary_Rev_ID and Tc_Relation_1 represents the properties on Item Revision type of Tc_Primary_Type. i.e. in above example, 'Work Effort' column represent 'psi0WorkEffort' property on *Wbs0ResourcePkgRevision*

Columns used in mapping file must be configured at Type specific preference

MDT_BusinessObjectType_primary_columns_mapping. e.g., for type *Wbs0ResourcePkg* primary columns mapping preference is

MDT_Wbs0ResourcePkg_primary_columns_mapping.

Similar way user can add additional preference for different types e.g., for *Item* type preference name will be *MDT_Item_primary_columns_mapping.*

Preference Value Format:

The format of each value of preference is as follows,

Value Part 1:Value Part 2: Value Part 3

First part of a Value in the preference represents the Column Name in the mapping file, second part represents the primary type name and third part value represents the real name of the property of the primary type. i.e.

Value Part 2 is optional if the value representing Item type property.

For example, : **WBS Number::wbs0Number**

value1: is column name in mapping file e.g., **WBS Number**

value2: represents the configuration is for Item Type property e.g., **Wbs0ResourePkg** – it is optional (as it is there in preference name)

value3: represents the property real name of Primary Item Type i.e., **wbs0Number**

Value Part 2 is mandatory if the value representing Item Revision type property, and its value need to be 'revision' for Item Revision type property.

Example: **Work Effort:revision:psi0WorkEffort**

value1: is column name in mapping file e.g., **Work Effort**

value2: represents the the Revision Type e.g., 'revision' is the value referring Item Revision property

value3: represents the property real name of Primary Revision type i.e., **wbs0Number**

Name	Location	Protection Scope	
MDT_Wbs0ResourcePkg_primary_columns_mapping	Site	Site	
Category	Environment	Type	Multiple
MDRT Content Load	Disabled	String	Multiple
Description			
Specifies the configuration between mapping file columns with primary business object properties for content load. The format of entries should be as follows for Item or WorkspaceObject: <column_name>:<>:<property_name> For Example: WBS Number::wbs0Number and the format of entries should be as follows for ItemRevision ::			
Values			
WBS Number::wbs0Number FWP Name::object_name WBS Type:revision:ipp0WBSType Tc_Primary_Rev_ID:revision:item_revision_id Work Effort:revision:psi0WorkEffort			

All the mentioned property need to be present in the *CreateInput* descriptor of the Type and Type Revision respectively.

Tc_Primary_Type, **Tc_Relation_1**, **Tc_Secondary_Type** and **Tc_Relation_2** columns configuration in preference is not needed. If **Tc_Primary_Rev_ID** column is used in mapping file, then the configuration for that is mandatory in preference as shown in above example.

Preference for Secondary Type columns

Below is an example for the secondary columns in the CSV for **Document** type:

Tc_Secondary_Type	Document Name	Document Description	Document Author	Document Subject	Document Title	Tc_Relation_2	Tc_File_Name
Document	Block Flow Diagrams	Block Flow Diagrams	Ravi Inti	Construction Plan	Introduction	TC_Attaches	Commissioning Schedules1.docx

The additional columns and the preference values for Secondary types like Primary types as discussed in above section.

An example of secondary type is **Document** in general, and preference for that is **MDT_Document_secondary_columns_mapping**.

Name MDT_Document_secondary_columns_mapping	Location Site	Protection Scope Site
Category MDRT Content Load	Environment Disabled	Type String
Multiple Multiple		
Description Specifies the configuration between mapping file columns with primary business object properties for content load. The format of entries should be as follows for Item or WorkspaceObject: <column_name>:<>:<property_name> For Example: Document Name::object_name and the format of entries should be as follows for ItemRevision ::		
Values Document Name::object_name Document Description::object_desc Tc_Secondary_Rev_ID::revision:item_revision_id Document Author::revision:DocumentAuthor Document Subject::revision:DocumentSubject Document Title::revision:DocumentTitle		

Similar way user can add additional preferences for different types e.g., for *Email* type preference name will be **MDT_Email_secondary_columns_mapping**.

Tc_Secondary_Rev_ID column is also configured in the above preference.

File Name Column

After primary columns and secondary columns there is a column named **Tc_File_Name** at end, CSV will look like below:

Tc_Primary_Type	WIS Number	FWP Name	Tc_Primary_Rev_ID	Work Effort	Tc_Relation_1	Tc_Secondary_Type	Document Name	Document Description	Document Author	Document Subject	Document Title	Tc_Relation_2	Tc_File_Name
WebResourcePkg	1.1.1	Block Flow Diagrams	A	900	Web3DModelDeliverableRef	Document	Block Flow Diagrams	Block Flow Diagrams	Ravi Inti	Construction Plan	Introduction	TC_Attaches	Commissioning Schedules3.docx

The values for this **Tc_File_Name** is optional. This represent the dataset to be created/updated with Secondary Type object. If it's empty for a row entry, there will not be any dataset created/updated.

Search Property Configuration: To find and reuse existing objects of Primary/Secondary Content Load process does update of the existing primary and secondary objects (as per configuration of row data) based on given search property. If object is not found using search property it creates new objects.

Below are the preferences to configure search property based on that existing objects are identified to parent context (e.g., MDR or Work Package) . **MDT_content_load_primary_search_properties**

Name MDT_content_load_primary_search_properties	Location Site	Protection Scope Site	
Category MDRT Content Load	Environment Disabled	Type String	Multiple Multiple
Description Specifies the configuration of search property of primary business object type for content load. The format of entries should be as follows: <object_type>:<property_name> For Example: Mdt0MDRDe:object_name			
Values Mdt0MDRDe:object_name Wbs0Element:object_name Wbs0ResourcePkg:object_name			

MDT_content_load_secondary_search_properties

Name MDT_content_load_secondary_search_properties	Location Site	Protection Scope Site	
Category MDRT Content Load	Environment Disabled	Type String	Multiple Multiple
Description Specifies the configuration of search property of secondary business object type for content load. The format of entries should be as follows: <object_type>:<property_name> For Example: Document:object_name			
Values Document:object_name Email:object_name			

Configuring content download

The below preferences are used to configure the content download Microsoft Excel templates

Preference	Valid values	Comments
MDT_MDR_content_download_templates	MDR_Content_Download_MDRDEL_Template	Specifies the name of the Excel templates to be shown in Excel Template drop down menu for Content Download in MDR structure.
MDT_MDR_default_content_download_template	MDR_Content_Download_MDRDEL_Template	Specifies the name of the default Excel template be shown in Excel Template drop down menu for Content Download in MDR structure
MDT_Transmittal_content_download_templates	Transmittal_Content_Download_MDRDEL_Template	Specifies the name of the Excel templates to be shown in Excel Template drop down

Preference	Valid values	Comments
		menu for Content Download on Transmittal.
MDT_Transmittal_default_content_download_template	Transmittal_Content_Download_MDRDEL_Template	Specifies the name of the default Excel template be shown in Excel Template drop down menu for Content Download on Transmittal.

Below mentioned Excel Templates, Transfer Modes, Closure Rules are used in configuring Content Download functionality, if customer want to add/change based on their business needs, they can update accordingly.

Excel Templates

- MDR_Content_Download_MDRDEL_Template.xlsm
- MDR_Content_Download_Template.xlsm
- MDR_Content_Download_WP_FWP_Template.xlsm
- Transmittal_Content_Download_MDRDEL_Template.xlsm
- Transmittal_Content_Download_WP_FWP_Template.xlsm

Transfer Modes

- MDR_Content_Download_MDRDEL_TM
- MDR_Content_Download_TM
- MDR_Content_Download_WP_FWP_TM

Closure Rules

- MDR_Content_Download_MDRDEL_CR
- MDR_Content_Download_CR
- MDR_Content_Download_WP_FWP_CR

Hide Dataset Visibility for Partner Group

There can be scenarios where EPS wants to hide some of the dataset types of deliverable instances from Partner Groups, then admin can configure ACL to hide specific

Dataset Type from Partner Group. With below configured ACL example, Datasets of PDF Type will not be visible to Partner Group.

Group	Partner	X	X	X	X
Groups with Security	External	X	X	X	X

Set up coversheet generation

When users complete assigning partner user for review, coversheets are created and attached to the trasmittals. For this, you must:

1. Install Visualization Convert and Print. For more information, see Convert and Print.
2. Ensure that you have installed Dispatcher with the **PreviewService** translators.
3. Go to TC_ROOT\DR\DispatcherClient\conf\Service.properties and add the following:

```
Translator.SIEMENS.previewservice.Prepare=com.teamcenter.ets.translator.ugs.basic.TaskPrep
```

```
Translator.SIEMENS.previewservice.Load=com.teamcenter.ets.translator.ugs.basic.DatabaseOperation
```

4. Restart dispatcher.

Configuring business constants

You can change the values of catalyst Business Constants to customize system behavior. These Business Constant (along with default value set by catalyst) must be reviewed before applying on customer environment and ensure that these Business Constant are not impacting customer existing environment behavior.

Business Constant Name	Scope	Description
RocORoCTableRowPropsMapping	WorkspaceObject e.g.MdtOMDRDelRevision	Business Object Constant stores the mapping of the properties of the Target Type present on Rules of Credit Business Object with Rules of

Business Constant Name	Scope	Description
		Credit Table decisive and progress properties.