



TEAMCENTER

Master Document Register and Transmittal — Usage

Teamcenter 2412

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Contents

Using the Master Document Register And Transmittal	
What is Master Document Register and Transmittal?	1-1
Create a master document register	1-1
Create a MDR deliverable	1-2
Import a Master Document Register using an import specification	1-2
Add vendors to the Master Document Register	1-2
Add a Master Document Register to a program	1-3
Add a partner contract to the Master Document Register	1-3
Submit the Master Document Register for review	1-3
Review and approve a Master Document Register	1-3
Create an Assignment Matrix Definition	1-4
Create assignment matrix Definition	1-4
Add an assignee to an assignment matrix	1-4
Managing rules of credit	1-4
Create Rules of Credit	1-4
Define internal and external progress values	1-5
Authoring Master Document Register (MDR) deliverables	1-5
Overview of reviewing and authoring Master Document Register (MDR) deliverables	1-5
Initiate a workflow to create and internally review a Master Document Register deliverable	1-5
Add documents to Master Document Register deliverables	1-6
Internally review and approve the Master Document Register	1-6
Enable a multi discipline review (optional)	1-6
Manage outgoing transmittals	1-7
Managing outgoing transmittals	1-7
Add an external reviewer in an assignment matrix	1-7
Create and send outgoing transmittals for customer review	1-7
Close a review task for outgoing transmittals on behalf of the customer	1-8
Performing content load	1-8
Overview of content load	1-8
Create a bulk upload	1-8
Approve a bulk upload	1-9
Search for Master Document Register and Transmittal data using saved queries	1-9



1. Using the Master Document Register And Transmittal

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.

Create a master document register

You must create a Master Document Register (MDR) for all the document deliverables in a project. Once created, you can assign the responsible users, reviewers, and approvers for each document.

1. Log on as Document Controller.
2. Open the **Explorer > More commands ... > New** ✨ **> Add** ⊕ and search for **Master Document Register**.
3. Specify the details and select the **Originator Type**.
4. Click **Add**.




Create a MDR deliverable

To create a MDR deliverable:

Procedure

1. Open the created Master Document Register and go to the **Content** tab.
2. Select **MDR Root** and click on **Add > Child**.
3. In the Add Child panel, select **MDR Deliverable** as the **Type**.
4. Specify the details and select **Controlled** as the **Deliverable Category**.
5. Click **Add**.

Import a Master Document Register using an import specification

1. Open the **Explorer** .
2. Open the Master Document Register and replace **MDR Root Object Name** with the name of your MDR.
3. Select the Microsoft Excel file with the Master Document Register and MDR Deliverables.
4. Select MDR Root and click **Add**  **> Child** .
5. Enter MDR Deliverable name and select **Deliverable Category** as **Controlled**.
6. Select the created deliverable.
7. Go to the **Deliverables** tab and add the document using the **Add** button from the **All Revision** section.
8. Enter the MDR Deliverable name and select **Deliverable Category** as **Controlled**.
9. Click **Add**.
10. Verify that the deliverable instance is displayed in the **All Revision** section in the **Deliverable** tab.

Add vendors to the Master Document Register

1. Go to the the Master Document Register (MDR) item.

2. From the **Overview** tab, click **Associated Vendors**.
3. Click **Add** after you add the vendors to the MDR.


Add a Master Document Register to a program

1. Open the program that you want the Master Document Register to be added to.
2. Select **Paste** from the **Overview** tab of the Program.


Add a partner contract to the Master Document Register

1. Open the Master Document Register (MDR) revision.
2. From the **Partners** tab, click **Add Partner**.
3. Select the **Vendor and Partner Contract** and click **Add**.

Submit the Master Document Register for review

1. Log on as document controller.
2. Open the Master Document Register (MDR) revision.
3. Verify that the MDR revision is the context.
4. Click **More commands** **...** > **Manage**  > **Submit to Workflow**.
5. Verify that **MDT Content Review Process** is assigned as **Template** and click on **Submit**.
6. Open **Select Signoff Team** from **Inbox**.
7. To add reviewers, click **Add** from the **REVIEWERS** section and click **Complete**.

Review and approve a Master Document Register


1. Log on as partner user.
2. Click **INBOX**  and select the **Perform-Signoffs** task.
3. Open the Master Document Register (MDR) revision from the **Targets** section.
4. Review the contents of the MDR.

- From **Tasks to Perform**, go to the **Workflow** tab and click **Approve**.

Create an Assignment Matrix Definition

Create assignment matrix Definition

The assignment matrix identifies the participants of a task, such as the author, reviewer, and approver. Assignment matrix definition is the rule that is set by the program manager or the document controller to decide these participants based on property sets for the deliverable, such as the discipline, document type, state, or status.

- Log on as program manager.
- Open  and select **Create Assignment Matrix Definition**.
- From **Decisive Properties**, select **MDR&T** as **Application Context** and **MDR Deliverable Revision** as **Target Type**.
- Select **Deliverable Category**, **Deliverable Discipline Name**, and **Deliverable State** from the **Add Decisive Properties** list by typing **Deliver** as filter criteria and click **Add**.

Add an assignee to an assignment matrix

- Log on as program manager and open the Master Document Register (MDR) revision.
- Create a new entry and fill in the required details.
- Select the entry from the **Entries** section, and click **Save As**.
- In the **Copy Editing** dialog box, perform the following steps:
 - Select your user from the **Assignees** section.
 - Click **Remove Assignee** against your name to dissociate the assignment from you.
 - Click **Add**.

Managing rules of credit

Create Rules of Credit

Rules of credit are used to measure the progress of each Master Document Register (MDR) deliverable. The program manager defines the rules of credit, and once these are applied, the deliverable progress score is automatically updated based on the state of the deliverable. This is applicable to both internal and external progress values, which are updated for incoming and outgoing transmittals, respectively.

1. Log on as program manager and open the master document register (MDR) revision.
2. Go to the **Rules of Credit** tab, and click **Add**.
3. Enter the name of the deliverable and add the revision as **Target Type** and click **Add**.

Define internal and external progress values

1. Open the Master Document Register (MDR) deliverable from the **Rules of Credit** tab.
2. Enter the values for **Internal Progress Value** and the **External Progress Value**.

Authoring Master Document Register (MDR) deliverables



Overview of reviewing and authoring Master Document Register (MDR) deliverables

Authors and reviewers are assigned to deliverables and receive tasks by Internal review workflows and the deliverables are internally released in this process. You can configure or modify these workflows according to their business processes.



Let us consider the following example:

There is a contract between an Engineering, Procurement, and Construction (EPC) contractor and an Owner/Operator (O/O) for the construction of a capital project. The EPC agrees on a Master Document Register (MDR) list to be submitted to the O/O for review and approval. The MDR deliverables are authored by EPC discipline engineers leads who get it internally reviewed before sending to O/O. Some deliverables may need interdisciplinary review (Squad review) and some others might also require department/discipline review only.

Initiate a workflow to create and internally review a Master Document Register deliverable

1. Log on as program manager.
2. Open the Master Document Register (MDR) revision.
3. Select the deliverable and and verify or set **ADDITIONAL PROPERTIES**.
4. Click **More commands ...** > **Manage**  > **Submit to Workflow** .
5. In the **Submit to Workflow** panel, go to the **Workflow** tab, and verify that the **Add or Update Documents** task is assigned to the engineer for an internal review.
6. Click **Submit**.


Add documents to Master Document Register deliverables

1. Log on as process engineer.
2. Open **Inbox** , and select **Add or Update Documents**.
3. Select the Master Document Register (MDR) Deliverables in the **Targets** section, and click on **Add to Favorites** from the **Manage**  menu.
4. Click **Favorites** and open the MDR Deliverable revision.
5. Choose **Deliverables** > **Add to** to add the documents.
6. In the **Add** dialog box, select **Document** as the **Type** and add the name of the document in the **Name** field.
7. Add the file using **Choose Files** in the **File Attachments** section, and then click **Add**.

Repeat this step for other deliverables assigned to you.


8. Open **Inbox** , and select **Add or Update Documents**, and click **Complete**.

Internally review and approve the Master Document Register

1. Log on as process engineering manager.
2. Open **Inbox** , and select **Perform MDR Deliverable Review**.
3. Open the MDR deliverables in the **Targets** section, and review the task.
4. After reviewing, approve the task.
5. Select **Yes** for **Squad Check Required?** if a squad check is required.

Enable a multi discipline review (optional)

In some scenarios, you may opt for an internal review from users across disciplines. You can enable a multidiscipline review in Teamcenter, using the following steps.

1. Log on as
2. Open **Inbox** , and select **Perform Multiple Discipline (Squad Check) Review**.
3. Review the MDR deliverables from the **Targets** section.


4. Approve the **Perform Multiple Discipline (Squad Check) Review** task.
5. Verify that the **Release Status** for the deliverable is set to **Internal Approved**.

Manage outgoing transmittals


Managing outgoing transmittals


As a document controller, you can share internally released documents with external stakeholders through a formal transmittal Process. The external stakeholders review the Master Document Register (MDR) and provide the document approval status. You can send a single or multiple MDR deliverables that are internally reviewed and approved for an external review through an outgoing transmittal.

Add an external reviewer in an assignment matrix


1. Log on as program manager.
2. Clone the Master Document Register (MDR) structure.
 - a. Open the MDR using the **Find MDR Revision** query.
 - b. Select the MDR root object and click **Duplicate** .
 - c. Open the cloned MDR object and click **Add vendor and Partners**.
3. Go to the **Assignment Matrix** tab and select the Master Document Register AMX from the **Assignment Matrix** section.
4. Add a new entry with the following details:
 - Set **Deliverable Category** to **Controlled**.
 - Set deliverable **Discipline Name** to **Process Engineer**.
 - Set **Deliverable State** to **Issue for Review**.
 - Set **Assignment type** to **Reviewer**.
5. Select Partner group Approver as **Assignee** and click on **Add**.

Create and send outgoing transmittals for customer review

1. Log on as document controller and open the master document register (MDR) revision.
2. Click **More commands** **...** > **New**  > **Create Transmittal**.

3. Specify a **Transmittal Name**, set the **Transmittal Type** to **Outgoing** and the **Transmittal Purpose** to **Issue For Review (IFR)**, and click **Create**.
4. Click **More commands ...** > **Manage**  > **Submit to Workflow** and click **Submit**.

Close a review task for outgoing transmittals on behalf of the customer

1. Log on as Partner Approver.
2. Click **Inbox**  to review the assigned task.
3. Click **Targets** > **Add Response for Transmittal Document(s)**.
4. Select **Overview** > **Coversheet** > **PDF**.
5. Select the document from the **Documents** section, **Exchange Contacts** and click **Add Responses**.
6. Enter the required details in the **Add Responses** dialog box, select **Approved** from **Review Status** and click **Add** to create the transmittal request for the selected document.
7. Go to **Transmittal** and complete the workflow task by clicking **Workflow** > **Complete**.

Performing content load

Overview of content load

Content load is used to create and upload the deliverable data set as bulk upload. This can be performed by document controller or partner user to create a Master Document Register (MDR) and upload datasets to MDR deliverables.


Create a bulk upload

As a document controller or a partner, you can create a Master Document Register (MDR) and upload datasets for your MDR deliverables as a bulk upload.

1. Log on as partner user.
2. Open the MDR Revision.
3. Go to the **Content** tab and click **Add** > **Create Content Load Request** and add the name of the deliverable.
4. In the **Mapping** section, click **Choose File** and select the mapping file.

5. Add the uploaded files in the **Files to Upload** section either by dragging and dropping or from the **Choose File** dialog box, click **Create** and ensure that the Content Load Request revision is open.

Approve a bulk upload

1. Log on as document controller.
2. Click **Inbox**  > **Team**.
3. Select **Perform-Signoff Task** and click **Approve**.

Search for Master Document Register and Transmittal data using saved queries

You can search for MDR&T data using the Advanced Search option. In **Advanced Search**, you can choose one of the following queries, which are available by default:

Query name	Valid values	Comments
Find Assignment Matrix	Amx0AssignmentMatrix	Search the assignment matrix for given criteria.
Find Assignment Matrix Definition	Amx0AssignmentMatrixDefn	Search the assignment matrix definition for given criteria.
Find MDR Revision	Mdt0MDRRevision	Search the master document register for given criteria.
Find MDR Deliverable Revision	Mdt0MDRDeIRevision	Search the master document register deliverable for given criteria.
Find Transmittal Revision	Mdt0TransmittalRevision	Search the transmittal revision for given criteria.
Find Rules of Credit	Roc0RulesOfCredit	Search the rules of credit for given criteria.
Find Functional Work Package	Wbs0ResourcePkgRevision	Search the functional work revisions for given criteria.
Find Functional Work Package Revision for MDR	Wbs0ResourcePkgRevision	Search the functional work revisions for given criteria.
Find Work Package	Wbs0ElementRevision	Search the Work Package(s) for given criteria.
Find Work Package for MDR	Wbs0ElementRevision	Search the work packages revisions For MDR for given criteria.