



TEAMCENTER

Contract Data Management on Active Workspace — Usage

Teamcenter 2412

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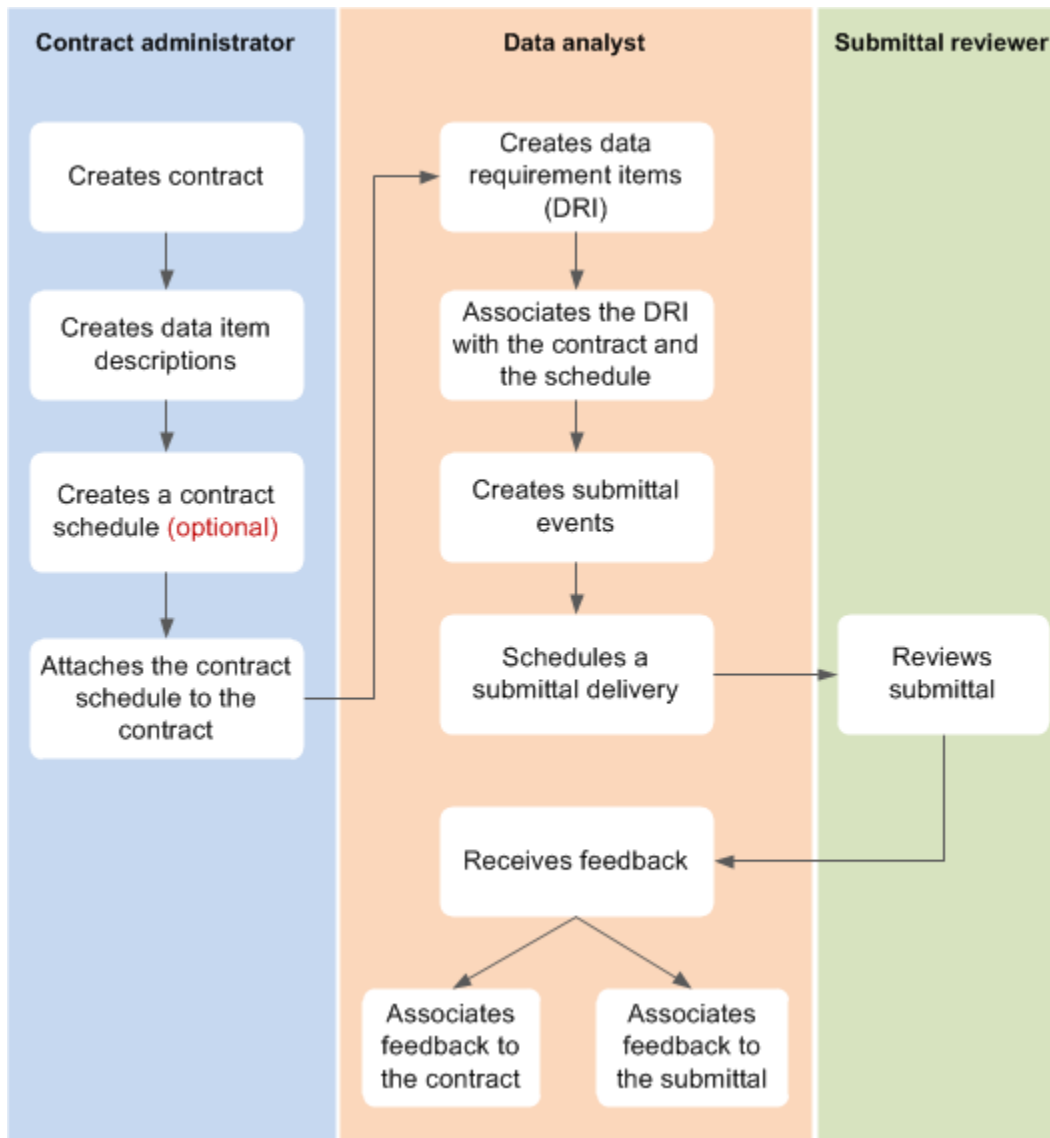
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1. Overview of contract data management

In the Aerospace and Defense industry, a contract is a structured procurement document that lists the milestones and schedule dates. As part of the contracting process, the contractor must submit data deliverables such as reports and documents. Contract data management helps the contractor manage the creation, review, and delivery of these deliverables.



A typical process for managing contract data is as follows:

1. Create a contract.

A *contract* in Active Workspace represents the contract you are working on. It has schedules that contain tasks and milestones.

2. Create data item descriptions.

A data item description (DID) is a standard form that specifies which data deliverables will be supplied as part of the contract. Contractors submit these forms as part of the response to a contract proposal.

A contract administrator creates DIDs in Active Workspace to keep track of the data deliverables that are promised to the customer.

3. Create a contract schedule.

A schedule defines when a document or submittal is due for submission. You can create a new schedule or use existing schedule templates in Active Workspace.

4. Attach the contract schedule to the contract.

5. Create data requirement items.

A data requirement item (DRI) represents a single data deliverable that the contractor must supply to the customer. For each DRI, the contractor must submit submittals at predefined intervals. The DRI lists how the different events, namely, the schedule tasks align with the schedule.

6. Associate the DRI with the contract and the schedule.

7. Create submittal events.

Submittal events specify when and which submittals must be sent to the customer. Submittal events are defined in the DRI.

8. Schedule a submittal delivery.

After creating submittal events, evoke an automatic generation of the submittals.


9. Review the submittals.

The data analyst reviews the submittal tasks to ensure that they are aligned with the submittal events.

10. Once the review workflow is triggered, data deliverables are sent to customers for review and approval.

Data deliverables are the submittals that are sent to the customer in the physical or electronic form.

11. Receive and store feedback.



The data analyst can store the feedback received from the customer in a correspondence item. Associate this feedback with the contract and the submittal, as required.

2. Creating and associating feedback with schedules or contracts

Create a correspondence

A data analyst creates a correspondence for a submittal and attaches the feedback documents to the correspondence object.

1. (Optional) Navigate to and open the folder where you want to create the correspondence.
2. Choose **More Commands** **...** > **New** ***** > **Add** **⊕**.
3. In the **Add** panel, select the type **Correspondence** from the list.
4. In the **Add** panel, in the **Correspondence** section, enter a unique **Name** for the correspondence.
5. (Optional) Provide an appropriate **Description** to distinguish the purpose of the correspondence.
6. Select the appropriate **Category** from the list to specify the category of the correspondence, for example, a memo.
7. Click **Add**.

You can also [create a correspondence from a submittal](#).

Associate a correspondence revision with a submittal revision

1. Open the revision of the submittal to which you want to attach the correspondence.
2. Click the **Correspondence** tab.
3. Click **Add** **⊕**.
4. In the **Add** panel, perform either action:
 - Click **New** to [create and attach a correspondence](#) to the submittal.
 - Select a correspondence from the **Clipboard**, **Favorites**, or **Recent** section in the **Palette** tab, and click **Add**.
 - **Search** for the desired correspondence, select it, and click **Add**.

Associate a contract with a correspondence revision

You can add a single contract or add multiple contracts to a correspondence revision. You cannot add a correspondence to a contract revision or to a data requirement item.

1. Open the revision of the correspondence to which you want to attach the contract.
2. Click the **Contracts** tab.
3. Click **Add** ⊕.
4. In the **Add** panel, perform either action:
 - In the **New** tab, create a contract to attach it to the correspondence.
 - Select a contract from the **Clipboard**, **Favorites**, or **Recent** section in the **Palette** tab, and click **Add**.
 - Use the **Search** tab for finding the desired contract, select it, and click **Add**.

3. Creating deliverables

Create a data requirement item

A data requirement item (DRI) is a container for the data deliverables described in the contract and the contract schedule.

You can create a DRI either in the context of a contract or as a standalone instance.

1. Search for and select the revision of the contract under which you want to create the DRI.
2. Click the **DRIs** tab.
3. Click **Add** ⊕.
4. In the **Add** panel, select the type **Data Requirement Item** from the list.
5. Enter a unique **Name** for the DRI.
6. (Optional) Provide an appropriate **Description** to help understand the type of deliverable you are creating.
7. Click **Add**.

The DRI is created and attached to the contract and is available in the **DRI** tab of the contract.

Once created, you can associate this DRI to the revision of a data item description (DID) which is submitted as part of the response to a contract proposal. To do this:

1. Open the revision of the newly created DRI.
2. Click the **DIDs** tab.
3. Click **Add** ⊕.
4. In the **Add** panel, use the **Pallette** or **Search** function to find the desired DID. You can also create a **New** DID, if required.
5. Click **Add**.

Create a submittal event for a data requirement item

Submittal events specify the timeline to submit submittals or deliverables for a contract. To enable submitting documents on specified dates, as a data analyst, you must define submittal events for a data

requirement item (DRI). The data (that you enter) from these submittal events is used to generate a submittal delivery schedule.

Create a submittal event

1. Open the revision of the DRI for which you want to create the submittal event.
2. In the **Overview** tab, in the **EVENT LIST** section, click **Add** ⊕.
3. In the **Add** panel, choose the **Schedule Task** that you want to associate with the DRI.

Here, **Schedule Task** lists the tasks that are part of the schedule associated with the contract with which this DRI is associated.

4. Provide the **Start Date** and the **End Date** for the submittal event.
5. Provide an **Offset** from the start or end date to calculate the submittal due date.

In some cases, even when the submittal is ready, you may need some extra time for submitting the deliverables. The offset in such cases is the time added to the deliverable submission date or the submittal due date. A submittal due date is the date for the first submittal delivery.

6. Choose the appropriate **Relative To** to specify whether the starting point should be the start date or the end date of the event.

For example, to keep the starting point the same as the start date, set **Relative To** to *Start Date*.

7. Based on your requirement, select an appropriate **Recurrence** to specify the frequency of the submittal event, for example, once a month or once in a quarter.
8. Provide the **Recurrence End Date** to specify the last date for the recurrence of the submittal event schedule.

The recurrence end date is the closing date for generating submittals.



9. Click **Add**.

The submittal event is displayed in the **Overview** tab > **EVENT LIST** section. The **Submittal Start Date** is displayed only in one of two cases: either after either you **generate a new submittal delivery schedule** or **after you generate an existing one again**.



Schedule Task	Event Name	Start Date	End Date	Offset	Relative To	Recurrence	Recurrence End Date	Submittal Start Date
SubmitReports	SubmitReports	02-Jul-2019 08:00	28-Dec-2019 17:00	2	Start Date	Monthly	31-Dec-2019 17:00	

Set scheduling properties for a submittal event

After creating a submittal event, you must set the scheduling properties required to generate a submittal delivery schedule.

1. Open the revision of the DRI for which you created the submittal event.
2. Choose **More Commands** **...** > **Edit**  > **Start Edit** .
3. In the **Overview** tab, in the **Scheduling Properties** section:
 - Select the appropriate **Align Task** from the list to align the submittal due date with either the start or the end date of the submittal event.

Align task specifies whether the submittal delivery starts on the date calculated using the submittal event attributes or whether it ends on the calculated date.

- Select an appropriate **Process Template** for the event to decide which workflow template to use to specify what needs to be done with the submittals once they are generated.
 - Select the **Submittal Type** from the list to specify the object type of the deliverable.
 - Provide the approximate **Task Duration Hours** to specify the duration of the submittal task in hours.
4. Choose **More Commands** **...** > **Edit**  > **Save Edits** .

Generate a submittal delivery schedule

As a data analyst, after you **create a submittal event** for a data requirement item (DRI) revision, you must generate a submittal delivery schedule. This schedule contains the timeline for the various submittal tasks.

1. Search for and open the revision of the DRI for which you want to generate the submittal delivery schedule.

Note:

Ensure that the **Event List** section lists schedule tasks (also called active tasks).

If the **Event List** section does not list your schedule tasks, verify whether you attached the contract schedule to the contract.

2. Click the **Submittal Schedule** tab.
3. Choose **More Commands** **...** > **New**  > **Generate Submittal Delivery Schedule**.

The submittal delivery schedule calculates the dates and times of the various submittal tasks based on the off days, holidays, and working hours in a day as set in the work calendar. See *Setting up work calendars* in the Teamcenter documentation to learn more about user and schedule calendars and the preferences that your administrator must set for configuring dates and times.

The various submittal tasks for the generated schedule are displayed in the **Submittals** section in the **Submittal Schedule** tab.

Rescheduling in contract data management

Occasionally the contract between two parties gets extended. In such cases, the different milestones within the schedule associated with the contract are also impacted.

Additionally, in some cases, either the event properties for generating submittals (for example, recurrence) or the alignment properties for a data requirement item (DRI) are changed. For example, instead of a half-yearly report, a monthly report is required or the task hours are reduced from eight to six hours.

In all such cases, you must reschedule to reflect the updates to the schedule tasks, milestones, or parameters.

Consider the following use cases:

A task within the schedule attached to a contract is updated

- The DRI containing a submittal event (also called as an event) based on the task being updated is impacted.
- In case the duration of the task is shortened, the submittal event that occurred in the past is retained as is. Also, if an event has not yet started and the end date of the event falls outside the end date of the task, the new submittals are generated based on the frequency or recurrence.
- For a work-in-progress submittal event, the submittals or deliverables not yet started are impacted and generated again. The submittals that are already in a workflow or are work-in-progress continue on to complete the workflow and are not changed.

The event list properties associated with a submittal event under a DRI are updated

- The completed and the work-in-progress submittals are deleted.
- A complete new set of submittals is generated based the updated properties.

The alignment (scheduling) properties associated with a DRI are updated

- All generated submittals are ignored and a completely new set of submittals is generated based the updated properties.

- *Alignment* properties take precedence over *event list* properties.

Reschedule your submittal events

Based on changes in the contract, the data analyst may need to reschedule the submittal events.

1. Open the revision of the contract for which you need to reschedule the submittal events.
2. Click the **DRIs for Reschedule** tab.

The **Impacted DRIs** section lists only the data requirement items (DRIs) that are impacted because of the change in the schedule.

The **Impacted events** section lists only those events that are impacted DRIs because of the change in the schedule.

3. In the **Impacted DRIs** section, select the DRIs that you want to reschedule.
4. Choose **More Commands** ... > **Manage** > **Reschedule Data Requirement Items**.

Based on the rescheduled dates, the events from the impacted DRIs are updated. Additionally, the submittals are updated and listed in the **Submittal** section of the impacted DRIs.

4. Creating and associating schedules and tasks

Create a schedule for your contract

When planning the schedule for the contract, ensure to verify the off days, holidays, and working hours in a day as set in your work calendar because these impact the timelines of the schedule. See *Setting up work calendars* in the Teamcenter documentation to know about user and schedule calendars and the preferences that your administrator must set for configuring dates and times.

Based on the requirements of your organization, you can either use an existing schedule template to create a schedule, or create a new schedule template.

After you create the schedule, add tasks to it, and then **associate the schedule with your contract**.

Associate a schedule with a contract

As a contract administrator, you must associate a schedule with the contract to provide a timeline for different submissions.

1. Open the revision of the contract with which you want to associate the schedule.
2. Click the **Schedule** tab.
3. In the **Contract Event Schedule** section, click **Add** ⊕.
4. In the **Add** panel, in the **New** tab, select the appropriate **Schedule Template** from the list.

You can also use the **Palette** tab to choose a template from the **Clipboard**, **Favorites**, or **Recent** section.

Note:

If you are unable to find your template in the **Schedule Template** list, it is because the schedule may not have been saved as a template earlier.

Based on the template that you choose, a new schedule is created. The template name is appended with the contract ID and revision.

5. Click **Add**.

The schedule is attached to the contract and is available in the **Schedule** tab.

Note:

- You can attach only one schedule to a contract at a time.
- You can attach a schedule that is different from the one attached only if no submittals have been generated for any of the data requirement items attached to the contract.

To replace an existing schedule:

1. Perform steps 1 through 4 of **associating a schedule with the contract**.
2. Click **Add**.

A message asking you whether to replace the earlier schedule is displayed.

3. Click **Replace** to replace the earlier schedule or **Cancel** to retain the existing schedule.

If any pre - existing submittals are not found, the schedule you select is attached to the contract. Else, the existing schedule is retained and a message providing the reason for not enabling the selection of the new schedule is displayed.

5. Creating contracts

Create a contract

A contract is signed between a customer and a supplier. Each contract defines a set of required deliverables, such as a purchase order or other procurement documentation.

The contract administrator creates a contract object, defines a master schedule with milestones, and associates this schedule with the contract.

1. (Optional) Navigate to and open the folder where you want to create the contract, for example, your **Newstuff** folder.
2. Click **More Commands** **...** > **New** ✨ > **Add** ⊕.
3. In the **Add** panel:
 - Select **Contract** in the **Recent** list.

OR

 - In **Other**, type **Contract**, and select **Contract** from the list.
4. Enter a unique **Name** for the contract.
5. (Optional) Provide an appropriate **Description** to help understand the purpose of the contract.
6. Select the appropriate **Contract Category** from the list:
 - **CONTRACT**: Any contract documents used for procurement.
 - **TWO**: A temporary work order.
 - **PO**: A purchase order.
7. Click **Add**.
8. (Optional) Open the newly-created contract and click **Start Edit** ✎.
9. Provide the values for other attributes, such as the contract cost, and so on.

You can either fill these properties now or as the contract progresses. For example, you may not want to provide the cost before negotiating on it.

10. Click **Save Edits**  to save your changes.

6. Creating and managing data required for a contract

Create a data item description

1. (Optional) Navigate to and open the folder where you want to create the data item description (DID), for example, your **Newstuff** folder.
2. Click **More Commands** **...** > **New** ✨ > **Add** ⊕.
3. In the **Add** panel, select the type **Data Item Description** from the list.
4. Enter a unique **Name** for the DID.
5. (Optional) Provide an appropriate **Description** to explain the purpose of the DID.
6. Provide the appropriate **DID Type** for classifying the document item.
7. (Optional) Provide the appropriate **Program Phases** for the DID.
8. Click **Add**.

All the data requirement items (DRIs) associated with this DID are listed in the **DRIs** tab. However, you cannot add any DRIs to this DID in this section. To add a DRI to this DID, **open the particular DRI revision and then associate it with this DID**.

7. Elements of contract data management

As a contractor, you come across the following terms in Teamcenter for managing the creation, review, and delivery of various data deliverables.

Term	Description
Data item description (DID)	Is a standard form submitted as part of the response to a contract proposal between a contractor and the United States Department of Defense. The DID defines the data content, format, and intended use of the data to comply with the standardization objectives of the Department of Defense.
Contract	Is a structured procurement document between a customer and a supplier. In Teamcenter Aerospace and Defense, this element contains schedules that in turn contain tasks and milestones.
Contract schedule	Defines when a submittal is due to be submitted.
Data requirement item (DRI)	Represents a single data deliverable that the contractor must supply to the customer.
Submittal event	Specifies when and which submittals must be sent to the customer. Submittal events are defined in the DRI.
Submittal	Refers to the data deliverable (such as a report or document) that is sent to the customer in physical or electronic form.
Correspondence	Is the feedback that you receive from the customer. You can associate this feedback to the contract and the submittal.