



# TEAMCENTER

## Contract Data Management on Rich Client — Usage

Teamcenter 2412

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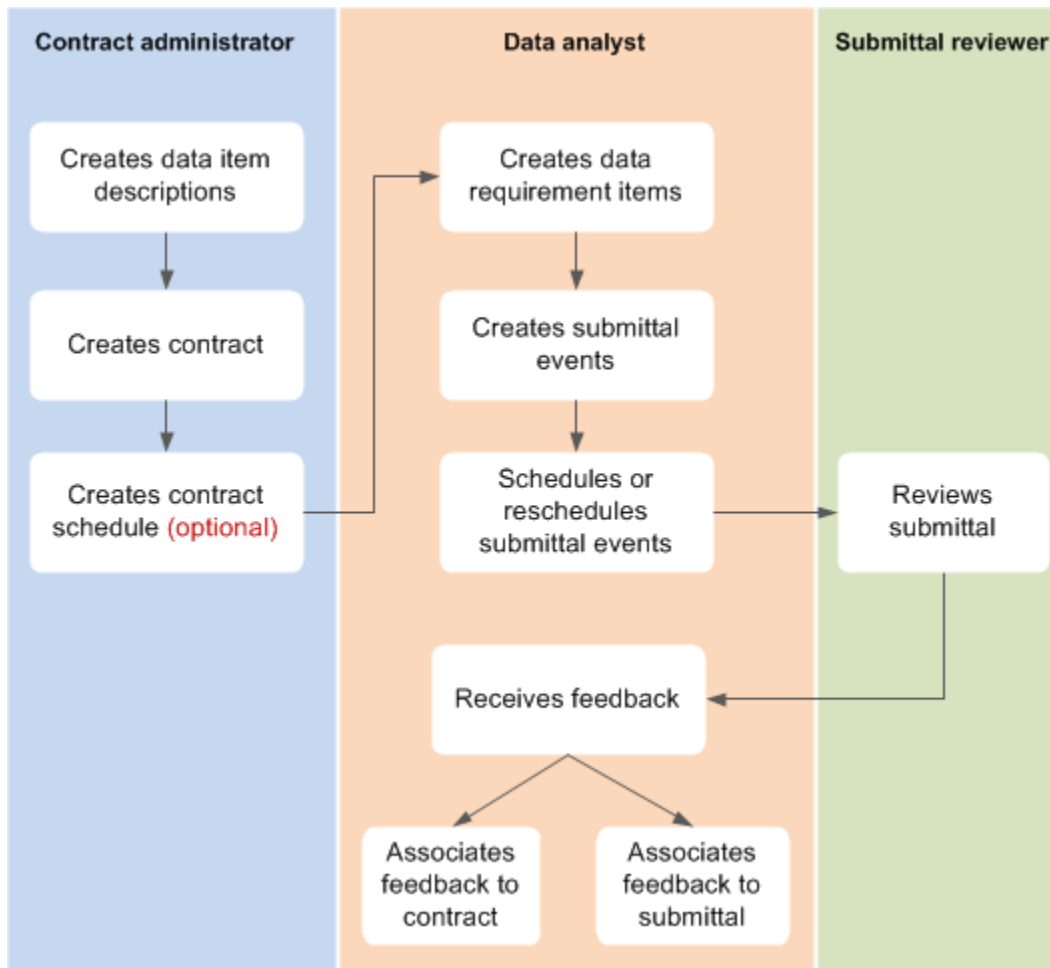
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# 1. Overview of contract data management

In the Aerospace and Defense industry, a contract is a structured procurement document that lists the milestones and schedule dates.

As part of contracts, 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 data deliverables.



A typical process for managing contract data is as follows:

## 1. Create data item descriptions

Data item descriptions (DIDs) are standard forms that specify which data deliverables will be supplied as part of the contract. Contractors submit these forms as part of the response to a contract proposal.

You create DIDs in Teamcenter to keep track of the data deliverables that are promised to the customer.

A DID is associated with a DRI.

### 2. Create a contract

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

### 3. Create a contract schedule

You can create a new schedule or use existing schedule templates.

### 4. Create data requirement items

A DRI represents a single data deliverable that the contractor must supply to the customer.

For each DRI, the contractor must submit documents or submittals at predefined intervals.

A DRI is always associated with a contract.

### 5. Create submittal events

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

### 6. Schedule a submittal delivery

After creating submittal events, you can create a schedule for submittal delivery. When you create a schedule, the submittal items are created automatically.

### 7. Review submittals

The submittal delivery schedule is based on a workflow template. The submittal tasks are routed for review and approval when you generate the submittal delivery schedule.

### 8. Send data deliverables to customers

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

### 9. Receive feedback

You can store the feedback that you receive from the customer in a correspondence item. You can associate this feedback to the contract and the submittal.

## 2. Create a data item description

Data item descriptions (DIDs) define the data content, data format, preparation instructions, and intended use. Typically, a DID is created to represent the document that you submit to the customer, declaring the data deliverables you intend to deliver.

1. Choose **File**→**New**→**Item**.
2. In the **New Item** dialog box, select **Data Item Description** and then click **Next**.
3. Specify information for the new item:

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<b>DID Type</b>	Specifies an attribute for classifying the document item.
<b>Description</b>	Describes the DID. Use a description that helps to distinguish the purpose of the DID.
<b>Name</b>	Specifies the identity of the DID and its revision.

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4. Click **Next**.
5. Define additional item revision information as follows:

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<b>Document Author</b>	Specifies the DID author.
<b>Document Subject</b>	Specifies the DID subject.
<b>Document Title</b>	Specifies the title of the DID.

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6. Click **Finish**.



# 3. Associate documents with data item descriptions

You can associate documents that you sent to the customer by attaching the forms to the data item descriptions (DIDs).

1. Choose **File**→**New**→**Dataset**.
2. Right-click and copy the dataset.
3. Select the DID revision item and choose **Edit**→**Paste Special**.
4. In the **Paste Special** dialog box, choose the appropriate attribute and then click **OK**.



## 4. 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 administrator creates a contract object in Teamcenter, defines a master schedule with milestones, and associates this schedule with the contract. The fields marked with an asterisk are required.

1. From My Teamcenter, choose **File**→**New**→**Item**.
2. In the **New Item** dialog box, select **Contract** and click **Next**.
3. Define information for the contract:

**Contract Category** Specifies the type of contract. The following options are available:

- **CONTRACT**

Represents any contract documents used for procurement.

- **TWO**

Represents a temporary work order.

- **PO**

Represents a purchase order.

**Description** Describes the contract item. Use a description that helps to understand the purpose of the item.

**Name** Specifies the identity of the contract.

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If naming rules are configured at your site, you can click the **Assign** button to automatically generate the contract ID and the revision.

4. Click **Next**.

In the **Contract Revision** dialog box, define additional item revision information as follows:

**Comments** Are used for providing remarks related to the contract.

**Contract Cost** Specifies the total cost of the contract. It also includes the addition to the cost delta resulting from a modification.

<b>Contract Cost Delta</b>	Specifies the relationship between the current contract cost and the inherent future contract cost that may arise due to modification of the contract.
<b>Contract Event schedule</b>	Specifies the milestones for the contract.
<b>Contract Pricing Model</b>	Specifies the payment forms for the contract, for example, the cost plus a fixed fee.
<b>Document Author</b>	Specifies the name of the person who has drafted the contract.
<b>Document Subject</b>	Specifies the content of the contract.
<b>Document Title</b>	Specifies the title of the procurement document.
<b>Effective Date</b>	Specifies the date from which the contract is effective.
<b>Office Primary Resp</b>	Specifies the name of the person or a role responsible for the review and acceptance of the contract.
<b>Period of Performance</b>	Specifies the duration of the contract, which is the time period specified in the contract (in months).
<b>Recurring Cost</b>	Specifies whether the contract cost is a recurring cost.
<b>SOW Affected</b>	Specifies whether the statement of work for the contract is affected due to contract modifications.

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5. Click **Next**.
6. Define the options for the contract and then click **Finish**.

## 5. Schedule contract events

1. Right-click the contract revision and choose **Add Contract Event Schedule**.
2. In the **Add Contract Event Schedule** dialog box, select a schedule template from the **Schedule Template** list to use an existing schedule. You can leave this field blank to add tasks to the schedule later.

Note:

To display all the templates, set the value of the **Cdm0UseCurrentProjSchTemplates** global constant to **False**.

Set the value to **True** if you want to display only specific schedule templates related to the project.



## 6. Create a data requirement item

A data requirement item (DRI) represents a data deliverable that the contractor must supply to the customer. A contract deliverable can be submitted either by the customer or by the supplier.

1. Choose **File**→**New**→**Data Requirement Item**.
2. In the **Data Requirement Item** dialog box, select **Data Requirement Item** and click **Next**.

Define the basic information for the new item as follows:

**ID / Revision - Name** Specifies the identity of the DRI and the DRI revision. This is a mandatory field.

Note:

If naming rules are configured at your site, you can click the **Assign** button to automatically generate the data requirement item ID and revision.

**Description** Describes the DRI.

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3. Click **Next**.

Define additional DRIs as follows:

**Contract Line Item Number** Specifies the section ID in the contract. This section describes how a specific task must be accomplished.

**Contract Reference** Specifies the contract ID. The DRI is associated with the contract ID specified.

**Provide Contract Deliverable** Specifies the type of contract data deliverable that is submitted by the customer or the supplier.

Select **True** to provide the contract deliverable to the supplier for review.

Select **False** to receive the contract deliverable from the supplier.

**Reference Citation** Specifies the ID of specific reference content in the document.

**Submittal Document Category** Specifies who delivers the submittals.

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4. Click **Next**.


**Note:**

The following happens when you click **Next**, **Back**, or **Finish** and have configured multifield keys for contracts:

If there are multiple contracts matching the criteria for contracts you specified in the **Define additional item information** dialog box, a dialog box is displayed. It contains a list of contracts matching the criteria you specified for technical documents. To select a contract, double-click the row containing the relevant contract.

## 5. Define additional DRI revision properties as follows:

<b>Addressee</b>	Refers to the reviewers of the contract.
<b>Approval Code</b>	Specifies the approval code for the DRI revision.
<b>Approval Required</b>	Specifies whether the customer must approve the data item.
<b>Cert Required</b>	Specifies whether the submitted data item requires certification.
<b>Comments</b>	Specifies any comments concerning the item.
<b>DID Title</b>	Specifies the title of the document.
<b>Data Management Due Offset</b>	Specifies the offset of the data management due date.
<b>Data Requirement Item Subtitle</b>	Specifies the subtitle of the DRI.
<b>Delivery Address</b>	Specifies the delivery address of the customer or the supplier.
<b>Delivery Mechanism</b>	Specifies the mode of delivery for the contract.
<b>Distribution Required</b>	Specifies whether any documentation related to the item must be distributed.
<b>Effective Cutoff Date</b>	Specifies the last date for data collection.
<b>Effective Cutoff Event Desc.</b>	Provides additional information about the last date for data collection.
<b>Event List</b>	Specifies the event table for generating an event schedule.
<b>Exhibit Name</b>	Specifies the ID of a particular data item in a data item description document.
<b>Media Type</b>	Specifies the format of the data, for example, electrostatic or microfilm.
<b>OPR Notif Due Offset</b>	Specifies the last date for creating the notification to the office of the primary reviewers.



<b>Office Primary Response</b>	Specifies the name of the contacts, groups, or role responsible for reviewing the data item.
<b>Office Primary Response Notification Due Offset</b>	Specifies the offset to the response due date. The notification will be sent based on the dates calculated based on this offset.
<b>Response Due Offset</b>	Specifies the offset to the response due date.
<b>Shipping Document Req'd</b>	Specifies whether DD Form 250 is required for the delivery of the data item.
<b>Submit Flow Thru</b>	Specifies whether a supplier's DRI must be submitted as a customer's DRI.
<b>Submit Purpose</b>	Specifies the purpose of the submitted data item.
<b>Submit Quantity</b>	Specifies the number of copies required for submission.

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6. Click **Next**.

Define the options and then click **Finish**.



# 7. Update a data requirement item

1. Navigate to the data requirement item (DRI) revision.
2. Right-click the DRI revision and choose **Check-In/Out**→**Check Out**.
3. In the **Check-Out** dialog box, fill in the relevant fields and then click **OK**.
4. Click the **Viewer** tab to display the DRI.
5. The **Event List** section specifies the event table for generating an event schedule. Based on the data defined in the event table, the submittal delivery schedule is generated.

Update the **Event List** section as follows:

## Event List

Click the **Add** button to add a row to define the following fields:

- **Contract Schedule Tasks**

Lists the contract tasks. Choose the contract task that you want to associate with the Data Requirement Item.

- **Summary Task Name**

Denotes the submittal delivery event name.

- **Start Date**

Denotes the event start date.

- **End Date**

Denotes the event end date.

- **Offset**

Denotes the offset used for calculating the submittal due date in order to calculate the first submittal delivery.

- **Relative To**

Denotes the relation of the offset to either the start date or the end date.

- **Recurrence**

Denotes frequency of the submittal delivery event.

- **Recurrence End Date**

Specifies the last date for event schedule.

**Process Template**

Specifies the workflow template to use when generating submittals.

**Task Duration Hours**

Specifies the duration of the submittal task in hours.

**Align Task**

Specifies how to calculate the due dates of the submittal tasks.

**Submittal Type**

Specifies the type of submittal, for example, whether it is from a supplier or internal.

6. Click **Check In**.

Note:

- You must save any modification to the DRI before navigating to other objects.

## 8. Create submittal delivery events for a data requirement item

The supplier must submit documents on specified dates. You can define the submittal delivery events for the data requirement item (DRI) after creating the DRI. The data from the submittal delivery events is used to generate a preliminary submittal delivery schedule.

1. Click **Add** in the **Event List** section.
2. Add the following information in the event row:

<b>Contract Schedule Tasks</b>	Lists the tasks that are part of the contract schedule. Choose the contract task that you want to associate with the DRI.
<b>Summary Task Name</b>	Denotes the submittal delivery event name.
<b>Start Date</b>	Denotes the start date for the event.
<b>End Date</b>	Denotes the end date for the event.
<b>Offset</b>	Denotes the offset used for calculating the submittal due date for calculating the first submittal delivery.  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.
<b>Relative To</b>	Denotes the relation of the offset to either the start date or the end date.  Specifies whether the starting point for the submittal generation should be the start date or the end date of the event
<b>Recurrence</b>	Denotes the frequency of the submittal delivery event, for example, once a month or once in a quarter.
<b>Recurrence End Date</b>	Specifies the last date for the recurrence of the submittal event schedule.

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3. Set scheduling properties for a submittal event:

<b>Process Template</b>	Specifies which workflow template to use to specify what needs to be done with the submittals once they are generated.
<b>Task Duration Hours</b>	Specifies the duration of the submittal task in hours.
<b>Align Task</b>	Specifies whether to align the submittal due date with either the start date 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.

**Submittal Type** Specifies the object type of the deliverable.

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## 9. Generate a submittal delivery schedule

The data analyst modifies the data requirement item (DRI) revision to define the submittal delivery events. This data is then used by the system to generate a draft submittal delivery schedule.

The submittal is automatically created after the data analyst generates the submittal delivery schedule. You can then modify this autogenerated schedule, if required.

1. Right-click the DRI revision item and choose **Generate Submittal Delivery Schedule**.

If you have specified offsets for the data management due date, OPR notification due date, and the response due date in the DRI, the due dates are calculated based on these offsets.



# 10. Create submittals manually

You can manually create a submittal schedule. The submittal monitors and notifies the customer or the supplier regarding the pending tasks and what is required to be delivered for each task assigned to them. After you create a submittal, you must attach it to the submittal delivery schedule task.

1. From My Teamcenter, choose **File**→**New**→**Item**.
2. In the **New Item** dialog box, select **Submittal** and then click **Next**.
3. Specify the name of the submittal and click **Next**.
4. In the **Cdm0SubmittalMaster** panel, specify the following information:

<b>Author</b>	Specifies the name of the person, group, or the role who initiated the submittal.
<b>Keywords</b>	Specifies the keywords that can be used later to search for the submittal.
<b>Subject</b>	Specifies the subject of the submittal.
<b>Title</b>	Specifies the title of the submittal.

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5. Click **Next**.
6. In the **SubmittalRevision** panel, specify the following information:

<b>DRI Item Type</b>	Specifies whether the data item requirement is from a customer or a supplier.
<b>Disposition</b>	Specifies the unique identifier for DD form 250, which is prepared for contract deliveries.
<b>Disposition Date</b>	Specifies the disposition or the incorporation date of a change or a submittal.
<b>Document Author</b>	Identifies the author of the DRI.
<b>Document Subject</b>	Specifies the subject of the DRI.
<b>Document Title</b>	Specifies the title of the DRI.
<b>Office Primary Resp</b>	Specifies the person, group, or the role responsible for reviewing and acknowledging the data item submittal.
<b>Received Date</b>	Specifies the date on which an item is received from the supplier or the date on which the item is sent to a customer.

<b>Resubmit Comments</b>	Specifies the customer's comments during resubmittal.
<b>Resubmit Due Date</b>	Specifies the due date of sending the contract data item to the customer.
<b>Resubmit Required</b>	Specifies whether the data item must be submitted again.
<b>Shipping Document Required</b>	Specifies the ID of DD Form 250 that is prepared to support contract deliveries.
<b>Submit Due Date</b>	Specifies the due date of the contract data item to the customer.
<b>Submittal Type</b>	Specifies the data item submittal stage, for example, draft or final.

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7. Click **Finish**.

# 11. Associate manually created submittals with schedule deliverables

You can relate the data that is to be delivered to the submittal through Schedule Manager. You must first associate the submitted deliverable to a schedule and then initiate a task.

1. Open Schedule Manager to locate the submittal object.
2. Select the submittal object and then choose **Schedule**→**Schedule Deliverables**.
3. In the **Schedule Deliverables** dialog box, click the **Add** button to define the following:

## **Name**


Specifies the name of the schedule deliverable.

## **Type**

Select **Submittal**.

## **Deliverable**

Specifies the submittal object that is associated with a Data Requirement Item (DRI).

Click the  button to search for the deliverable.

4. Click **OK**.
5. Expand the submittal object and select the task object.
6. Choose **Schedule**→**Task Deliverables**.
7. In the **Task Deliverables** dialog box, click the **Add** button to define the following:

## **Schedule Deliverable**

Specifies the name of the schedule deliverable.

## **Submit Type**

Specifies the type of task.

## **Target**

Select this to attach the deliverable as a target attachment to the task workflow.

## **Reference**


Select this to attach the deliverable as a reference attachment to the task workflow.

### **Do Not Submit**

Select this when no deliverable is attached to the task workflow.

### **Deliverable**

Specifies the submittal object that is associated with a DRI.

Click the  button to search for the deliverable.

8. Click **OK**.
9. Double-click the task deliverable object to define the workflow process.
10. In the **Properties** dialog box, edit the schedule tasks to define the workflow process.

You can select a workflow template from the **Workflow Template** list.

11. Click **OK**.

# 12. Data Requirement Item rescheduling rules

You can use Data Requirement Item (DRI) rescheduling to update the dates in the DRI event list and then generate the submittal delivery schedule again.

You can reschedule the DRI at the *contract level* or at the *DRI level*. Rescheduling at a contract level updates all the impacted DRI event lists.

When rescheduling at the DRI level, you can choose the DRI events to reschedule.

The following rules apply when you reschedule a DRI:

- The submittal tasks that are complete or are in progress will not be rescheduled.
- The submittal tasks with a start date earlier than the current date will not be rescheduled.
- The submittal tasks that are yet to start and with a start date in the future will be rescheduled.
- If the start date of the submittal tasks predates the current date, the tasks will be rescheduled to start on the current date.
- If the event list in the DRI is deleted, all the submittal tasks that are yet to start will be deleted.
- If the DRI event list is not mapped to the contract schedule event list, all the submittal tasks yet to start will be deleted.
- If you manually change the DRI schedule in Schedule Manager, the corresponding event list will not be updated.

If the value of the **Cdm0UseFixedSubmittalDueDates** preferences is **true**, the submittal due dates will be calculated based on the company working time. For example, if a submittal due date falls on a holiday, the due date is adjusted to the previous working day. If the adjusted due date is also a holiday, the due date is moved to the next available working day.

For example, consider a monthly frequency for the submittal. If the starting submittal due date is January 1, the next submittal due date is February 1. If February 1 is a holiday, January 31 is chosen as the submittal due date. If January 31 is a holiday, the next available working day in February is chosen as the due date.

The **Generate Submittal Delivery Schedule** functionality will now update the submittal delivery schedule if the DRI event list is changed.



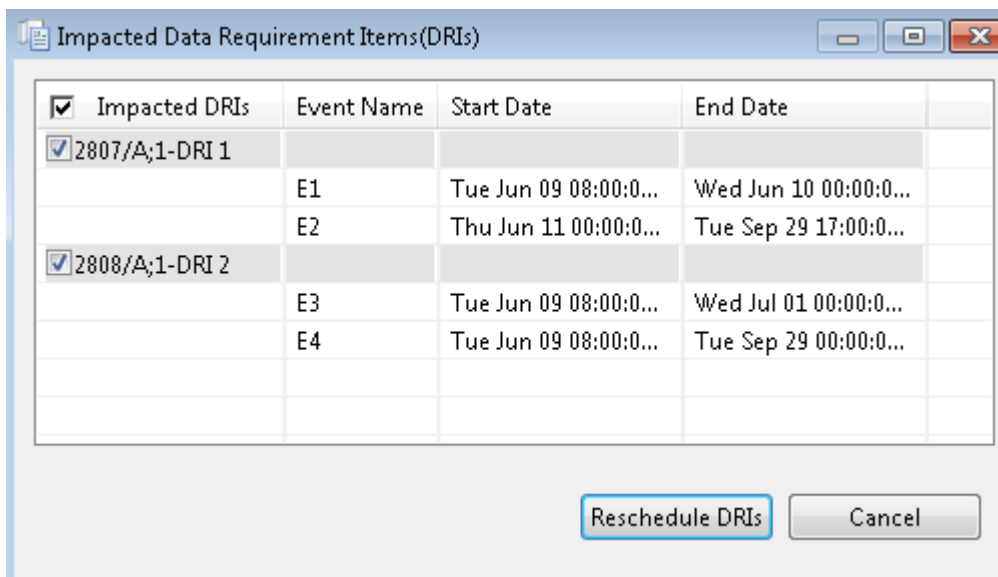
# 13. Reschedule a data requirement item

You can reschedule a data requirement item (DRI) at the DRI level or at the contract level. Rescheduling at the contract level provides you the option of rescheduling all the DRIs in the contract.

The **Generate Submittal Delivery Schedule** functionality reschedules the submittal delivery schedule if the DRI event list has changed.

To reschedule DRIs at the contract level, do the following:

1. Right-click the contract revision and choose **Reschedule Data Requirement Items**.
2. In the **Impacted Data Requirement Items(DRIs)** dialog box, choose the DRIs you want to reschedule.



3. Click **Reschedule DRIs**.
4. Click **OK** in the **Rescheduling Summary** dialog box.

The DRIs are rescheduled as per the **DRI rescheduling rules**.



# 14. Create a correspondence

The data analyst creates a correspondence in Teamcenter and attaches the feedback documents to the correspondence object.

1. From My Teamcenter, choose **File**→**New**→**Item**.
2. In the **New Item** dialog box, select **Correspondence** and click **Next**.
3. Define basic information for the correspondence as follows:

<b>Name</b>	Identifies the correspondence.
<b>Description</b>	Describes the correspondence item. Use a description that helps you distinguish the purpose of the correspondence item.
<b>Correspondence Type</b>	Specifies a category of similar technical documents, for example, assembly drawings, wire list, or material specifications.

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4. Click **Next**.
5. In the **CorrespondenceRevision** dialog box, define additional information as follows:

<b>Category</b>	Specifies the correspondence category, for example, memo.
<b>Correspondence Direction</b>	Specifies whether the correspondence is incoming or outgoing.
<b>Document Author</b>	Identifies the name of the person or the role who initiated the correspondence.
<b>Document Subject</b>	Specifies the subject of the correspondence.
<b>Document Title</b>	Specifies the title of the correspondence.
<b>Priority</b>	Specifies the priority level for accomplishing the task.
<b>Received Org Name</b>	Specifies the name of the organization receiving the correspondence.
<b>Received or Sent Date</b>	Specifies the date on which the correspondence was received or sent from the supplier or the customer.
<b>Reference</b>	Specifies the list of references.
<b>Reply Requested Date</b>	Specifies the date by which a reply is expected.

<b>Reply Required</b>	Specifies whether a reply is required or not.
<b>Responsible Party</b>	Specifies the person or roles responsible for replying.

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6. Click **Finish**.

# 15. Associate the correspondence revision with a submittal revision

Communication related to the scheduled tasks must be associated with a submittal revision.

1. Right-click the correspondence revision item and choose **Copy**.
2. Navigate to the submittal revision item.
3. Select the submittal revision and choose **Edit→Paste Special**.
4. In the **Paste Special** dialog box, select **Correspondences** from the **Add As:** list.
5. Click **OK**.



## 16. Associate a correspondence with a contract revision

All communication related to the contract must be associated with a correspondence revision.

1. Right-click the contract revision and choose **Copy**.
2. Select the correspondence revision and choose **Edit→Paste Special**.
3. In the **Paste Special** dialog box, select **Contracts** from the **Add As:** list.
4. Click **OK**.