	<b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b>	Document Number: <b>FS-AD 3221</b>	Rev.: <b>F</b>
	Title: <b>ZINS Service Order (Create, Change, Reject)</b>		Page #: <b>1 of 15</b>
Procedure Owner(s) – list Functions:		Revision's Training Requirements – select one or both (per section #9): <b>Awareness X_      Formal</b>	

## CONTENTS

1	Purpose.....	1
2	Scope – applies to where & when the work instruction is used.....	1
3	Definitions and Acronyms .....	1
4	Graphic (if needed) .....	2
5	Responsibilities .....	2
6	Procedure .....	2
7	Associated Quality Records – as stated in the Quality Records List .....	13
8	Reference Forms / Templates / Documents.....	13
9	Current Revision's Training Requirements.....	13
10	Revision History & Approval .....	14

### 1 PURPOSE


- 1.1 To provide instruction on how to properly create a ZINS service order in SAP CRM.

### 2 SCOPE – APPLIES TO WHERE & WHEN THE PROCEDURE IS USED

- 2.1 This procedure applies to all MTS service employees operating in SAP CRM. This procedure will be used to create/update service orders for activities where costs must settle to one of the following:
- Sales Order/Item = ECC Sales Order number and Line item
    - *ZISO order/line item **or** ECC Contract number/line item*
  - Cost Center = ECC Cost Center
  - Internal Order = ECC Internal order
    - *CRM contract/header line item*
  - WBS Element = ECC WBS Element number
    - *Must be the installation leg; -96 or -95 or training leg -79*

### 3 DEFINITIONS AND ACRONYMS

- 3.1 **Account:** MTS Assigned Site Number of equipment location.

	<p align="center"><b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b></p>	<p>Document Number: <b>FS-AD 3221</b></p>	<p>Rev.: <b>F</b></p>
<p>Title: <b>ZINS Service Order (Create, Change, Reject)</b></p>		<p>Page #: <b>2 of 15</b></p>	
<p>Procedure Owner(s) – list Functions:</p>		<p>Revision's Training Requirements – select one or both (per section #9): <b>Awareness X_      Formal</b></p>	

- 3.2 **FSE:** Field Service Engineer
- 3.3 **Header Line Item:** Defines the upper level service category and execution of the deliverable services.
- 3.4 **Installed Base/External ID (IBase):** Site number or Functional location number.
- 3.5 **ISC:** Internal Service Coordinator
- 3.6 **SOW:** Scope of Work
- 3.7 **STO:** Stock Transport Order
- 3.8 **Sub-Line Item:** The service products (activities) to be delivered under the Header line item. Each has its own component and price.


#### 4 GRAPHIC (IF NEEDED)

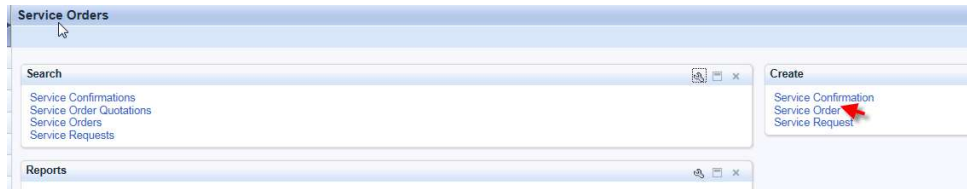
#### 5 RESPONSIBILITIES

- 5.1 Internal Service Coordinator (ISC) in the Retail Sales Org:
  - Creates and assigns ZINS orders as appropriate.*
  - Proactively reviews automatically created ZINS orders in Created Status and Releases for project installations*
  - Note: In the case of installation, the ISC in the delivery org creates the ZINS in the Retail Sales Org and follow-up ZISV for use in delivery org as appropriate*
- 5.2 Contract Administration:
  - 5.2.1 Creates ZINS order for Site-Plan contract delivery.

#### 6 PROCEDURE

- 6.1 From the left navigation bar, choose “Service Orders > Create > Service Orders.”

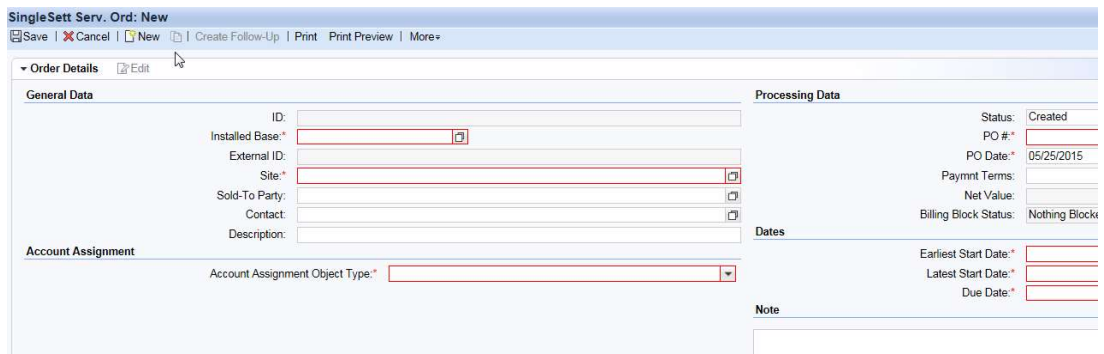
	<b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b>	Document Number:	Rev.:
		<b>FS-AD 3221</b>	<b>F</b>
Title: <b>ZINS Service Order (Create, Change, Reject)</b>		Page #: <b>3 of 15</b>	
Procedure Owner(s) – list Functions:		Revision's Training Requirements – select one or both (per section #9): <b>Awareness X_      Formal</b>	



6.2 Select Transaction Type “ZINS.”




6.3 SingleSett Service Order: New screen will appear. Enter the Installed Base (IBase).



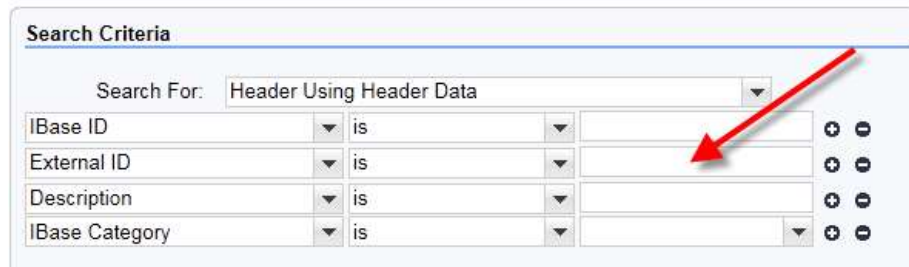
6.3.1 Click on the Input Help button to search IBase.



6.3.2 Enter the customer site number (Functional location number) in the

	<b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b>	Document Number:	Rev.:
		<b>FS-AD 3221</b>	<b>F</b>
Title:		Page #:	
<b>ZINS Service Order (Create, Change, Reject)</b>		<b>4 of 15</b>	
Procedure Owner(s) – list Functions:		Revision's Training Requirements – select one or both (per section #9):	
		<b>Awareness X</b>	<b>Formal</b>

External ID field.



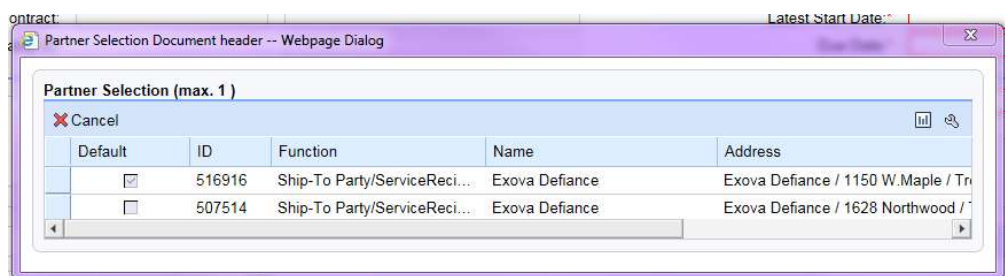
6.3.3 Select the record shown in the search results.

6.4 Enter Site Number and click [Enter]

6.5 The Partner Selection screens will appear for you to select additional partners when multiples exist. Make selections as appropriate.




Default	ID	Function	Name	Address
<input checked="" type="checkbox"/>	34939	Contact Person	Charles Carpenter	Charles Carpenter / 1628 Northwood
<input type="checkbox"/>	34917	Contact Person	William Woodcock	William Woodcock / 1628 Northwood
<input type="checkbox"/>	34915	Contact Person	William Breyer	William Breyer / 1628 Northwood / Tr
<input type="checkbox"/>	34906	Contact Person	Vinnay Kothandapani	Vinnay Kothandapani / 1628 Northw
<input type="checkbox"/>	34905	Contact Person	Tom Trudel	Tom Trudel / 1628 Northwood / Troy
<input type="checkbox"/>	34900	Contact Person	Tom Lewczynski	Tom Lewczynski / 1628 Northwood /
<input type="checkbox"/>	34936	Contact Person	THOMAS FROHMAN	THOMAS FROHMAN / 1628 Northw



Default	ID	Function	Name	Address
<input checked="" type="checkbox"/>	516916	Ship-To Party/ServiceRecl...	Exova Defiance	Exova Defiance / 1150 W. Maple / Tr
<input type="checkbox"/>	507514	Ship-To Party/ServiceRecl...	Exova Defiance	Exova Defiance / 1628 Northwood /

6.6 Confirm Sales and Service Organization assignment by opening the Organizational Data assignment block.

6.6.1 If necessary, change data to reflect the appropriate sales/service organization data.

	<b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b>	Document Number: <b>FS-AD 3221</b>	Rev.: <b>F</b>
	Title: <b>ZINS Service Order (Create, Change, Reject)</b>		Page #: <b>5 of 15</b>
Procedure Owner(s) – list Functions:		Revision's Training Requirements – select one or both (per section #9): <b>Awareness X_      Formal</b>	

Organizational Data			
Sales	Service		
Sales Org. Unit: SORG.1100	MTS Systems Corporation	Service Org. Unit: AMR_US_SRV	US Test Service
Sales Organization: SORG.1100	MTS Systems Corporation	Service Organization: AMR_US_SRV	US Test Service
Distribution Channel: 04	MT&S Order Services		
Division: 01	General		
Sales Office:			
Sales Group:			

6.7 Enter Account Assignment Object Type (from the drop down menu) and complete the subsequent assignment number fields then [Enter]

**Account Assignment**

Account Assignment Object Type:\*

- ECC Sales Order/Item
- ECC Cost Center
- ECC Internal Order
- ECC WBS Element

- ECC Sales Order/Item
  - ZISO order/On-site line item, ECC Contract number/line item
- Cost Center
  - ECC Cost Center
- ECC Internal Order
  - ECC Internal order number for a CRM contract/header line item.
- WBS Element
  - ECC WBS Element number
    - Must be the installation leg (-95 or -96) or training leg (-79)

**NOTE:** An error will be received if the assignment number entered is not valid.

6.8 Copy the Account Assignment data into the Purchase Order field.


6.9 Enter Due Date of Service.

Dates \_\_\_\_\_

Original Due Date: 11/12/2023

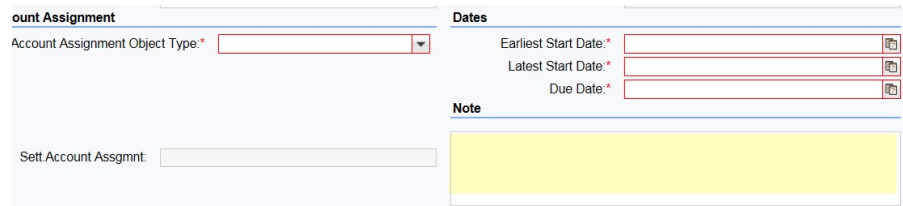
Scheduled Finish Date:

Note

	<b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b>	Document Number: <b>FS-AD 3221</b>	Rev.: <b>F</b>
	Title: <b>ZINS Service Order (Create, Change, Reject)</b>	Page #: <b>6 of 15</b>	
Procedure Owner(s) – list Functions:		Revision's Training Requirements – select one or both (per section #9): <b>Awareness X_      Formal</b>	

6.10 Enter a short description of the order reason in the Description field.

6.11 Enter any internal administrative notes in the Note Field.



**NOTE:** Should include ECC notification number, equipment numbers, PO numbers, related orders, etc. as applicable

6.12 To add descriptive text that will print on subsequent customer documentation or print out on the FSE work tasks, go the Notes assignment block.

6.12.1 Click [New].



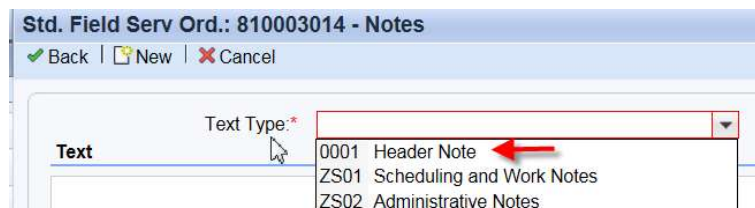
**FSE Note:**


6.12.2 Select “Scheduling and Work Notes” as the text type and enter notes

**NOTE:** If order will contain local and inter-company delivery content, enter this type of note to notify the FSE to coordinate delivery schedule with the FSE in the affiliate office.

**Customer Facing Note:**

6.12.3 Select “Header Note” as the text type and enter notes.



	<b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b>	Document Number: <b>FS-AD 3221</b>	Rev.: <b>F</b>
	Title: <b>ZINS Service Order (Create, Change, Reject)</b>		Page #: <b>7 of 15</b>
Procedure Owner(s) – list Functions:		Revision's Training Requirements – select one or both (per section #9): <b>Awareness X_      Formal</b>	

6.13 Enter the header and sub-line items for the scope of work (SOW) to be performed.

**NOTES:**

- *The Travel header line will automatically populate and must remain on the order. Since this is a non-billable order, there is no need to add any sub-lines under the travel header.*
- *The Travel Header line will automatically populate with an “Installation” item category, if the order is not for installation, you will need to update this item category to reflect Expense Header*

Item	Product ID	Qty	Product	Item Category	Net...	A
10	TRAVELXP	1	H- TRAVEL & ADMIN	Installation Expense	0.00	
				ZCEQ Expense Header		
				ZCES Installation Expense		

- *Do not manually enter numbers in the “item” column. They must be system assigned.*

Item	Product ID	Qty	Product
10	TRAVELXP	1	TRAVEL EXPENSE HDR

6.13.1 Enter remaining header and sub-line items for the SOW to be performed. (Repeat these steps for all Header/sub-line items).


6.13.1.1 **Header** line items: Enter product ID only and click [Enter].

6.13.1.2 **Sub-line** items: Enter appropriate header line item in the **reference** field and the product ID, click [Enter]

6.13.1.3 Repeat these steps for all Header/sub-line items

**IMPORTANT NOTES:**

- *Header Products represent both the category of the work to be delivered and whether or not the work in this category will be;*
  - *Optimized(sent to Zinier)- Example: INSTALLGENOP, SERVICENO*
  - *Non-optimized (not sent to Zinier)- Example: SERVICENO*

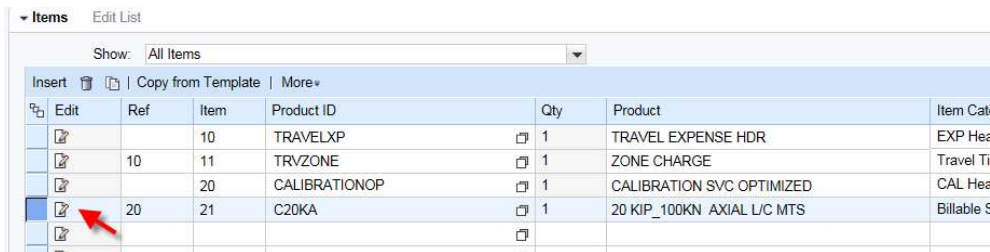
	<b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b>	Document Number: <b>FS-AD 3221</b>	Rev.: <b>F</b>
	Title: <b>ZINS Service Order (Create, Change, Reject)</b>		Page #: <b>8 of 15</b>
Procedure Owner(s) – list Functions:		Revision's Training Requirements – select one or both (per section #9): <b>Awareness X_      Formal</b>	

○ *Inter-Company (performed by an MTS service employee located in another sales org)- Examples: INSTALLGENIC, SERVICEIC*

● *The following products should not be entered on the service order. They are for use on Time/Activity confirmations only;*

- |                     |                      |
|---------------------|----------------------|
| <i>ADMINTIME</i>    | <i>EXCEPTIONPART</i> |
| <i>LOSTTIMECUST</i> | <i>PURCHASEDPART</i> |
| <i>LOSTTIMEMTS</i>  | <i>TRAVELTIME</i>    |

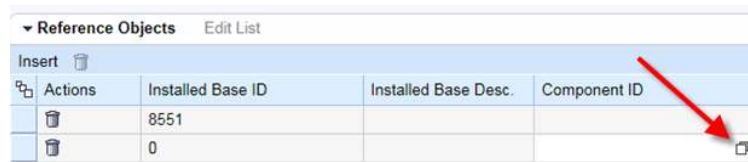
6.14 Enter sub-line component data by clicking on the edit icon to the left of the item.



Edit	Ref	Item	Product ID	Qty	Product	Item Cat
		10	TRAVELXP	1	TRAVEL EXPENSE HDR	EXP Hea
	10	11	TRVZONE	1	ZONE CHARGE	Travel Tr
		20	CALIBRATIONOP	1	CALIBRATION SVC OPTIMIZED	CAL Hea
	20	21	C20KA	1	20 KIP_100KN AXIAL L/C MTS	Billable S

6.14.1 Go to the Reference Object assignment block and enter the “Component ID” of the equipment this service will be performed on.

6.14.1.1 Select the input help button in the Component ID field.



Actions	Installed Base ID	Installed Base Desc.	Component ID
	8551		
	0		


6.14.1.2 Enter the site number in the “External ID” and click [Search].



Search For: Component Using Header Data	
IBase ID	is
IBase Category	is
External ID	is 502626
Description	is

6.14.1.3 Select the equipment the service will provided on from the resulting list.



	<p align="center"><b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b></p>	<p>Document Number: <b>FS-AD 3221</b></p>	<p>Rev.: <b>F</b></p>
<p>Title: <b>ZINS Service Order (Create, Change, Reject)</b></p>		<p>Page #: <b>9 of 15</b></p>	
<p>Procedure Owner(s) – list Functions:</p>		<p>Revision's Training Requirements – select one or both (per section #9): <b>Awareness X Formal</b></p>	

Search Criteria Hide S...

Search For: Component Using Header Data

IBase ID	is		o o
IBase Category	is		o o
External ID	is	500909	o o
Description	is		o o

Maximum Number of Results: 100


Search Clear

**Result List: 36 Installed Base Components Found**

Installed...	Compon...	I...	Description	Object ID	C...	Valid...	Valid To	Sort...
5149	5150		General Dynamics	500909	C...	11/04..	12/31..	C003..
5149	41817		SYSTEM	1000342	C...	02/05..	12/31..	
5149	41818		SYSTEM	1000343	C...	02/05..	12/31..	
5149	41819		SYSTEM	1000344	C...	11/11..	12/31..	
5149	41820		SYSTEM	1000345	C...	02/05..	12/31..	

**NOTE:** If unknown, you may select the record referencing the site number in the Object ID column, however, if the service will be provided under a System Project Warranty, you must select the appropriate equipment record.

- 6.14.2 Click [Back] to return to the main order page.
  
- 6.15 Once all activities are entered and the order is ready to be Released;
  - For Optimized orders that will be scheduled in Zinier:
    - Change the order status to “Released/Sent to Scheduling” and click [Save].
  
  - For Non-Optimized orders that will not be scheduled:
    - Change the order status to “Released/Not Sent to Scheduling” and click [Save].
  
- 6.16 If Errors exist;
  - 6.16.1 Make necessary corrections and Save
  - 6.16.2 Repeat until no errors exist.
  
- 6.17 If the order is non-optimized, create a follow-up task, assigned to yourself, to ensure status update upon fulfillment of the order.;

	<b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b>	Document Number: <b>FS-AD 3221</b>	Rev.: <b>F</b>
Title: <b>ZINS Service Order (Create, Change, Reject)</b>		Page #: <b>10 of 15</b>	
Procedure Owner(s) – list Functions:		Revision's Training Requirements – select one or both (per section #9): <b>Awareness X_      Formal</b>	

6.18 **If 3rd party services** were included on this order, create a purchase requisition in SAP-ECC following the *3<sup>rd</sup> Party Purchase Requisition process and create a follow-up task, assigned to yourself, to ensure the line item is completed upon fulfillment.*

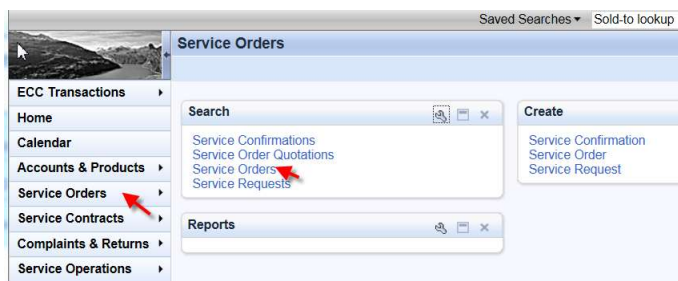
6.19 **If Inter-company Header** items are included on this order, create a ZISV inter-company order following the *ZISV Inter-company Order Create* process.


**NOTE:** *ZISV order must be created AFTER the complete SOW is defined in the ZINS order.*

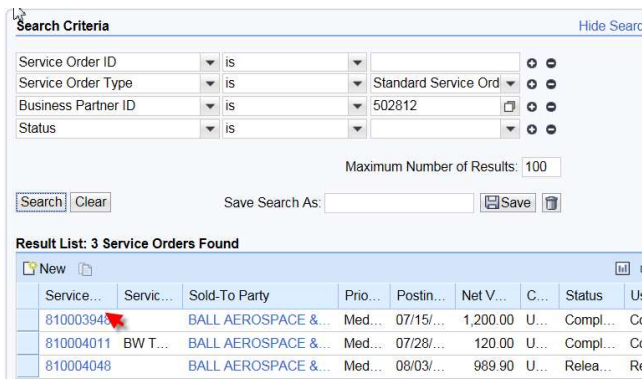
6.20 **If physical parts** were included on this order, create STO in ECC following the STO work instructions and place on hold if waiting for instructions on where/when to ship the item(s) **OR** issue the parts directly to the appropriate internal order for the service order following those instructions.

**CHANGE:**

6.21 Click on Service Order from within your assigned task OR search for the order from the left navigation bar by choosing “Service Orders>Search>Service Order



	<b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b>	Document Number:	Rev.:
		<b>FS-AD 3221</b>	<b>F</b>
Title:		Page #:	
<b>ZINS Service Order (Create, Change, Reject)</b>		<b>11 of 15</b>	
Procedure Owner(s) – list Functions:		Revision's Training Requirements – select one or both (per section #9):	
		<b>Awareness X</b>	<b>Formal</b>



**Search Criteria** Hide Search

Service Order ID is

Service Order Type is  Standard Service Ord

Business Partner ID is  502812

Status is

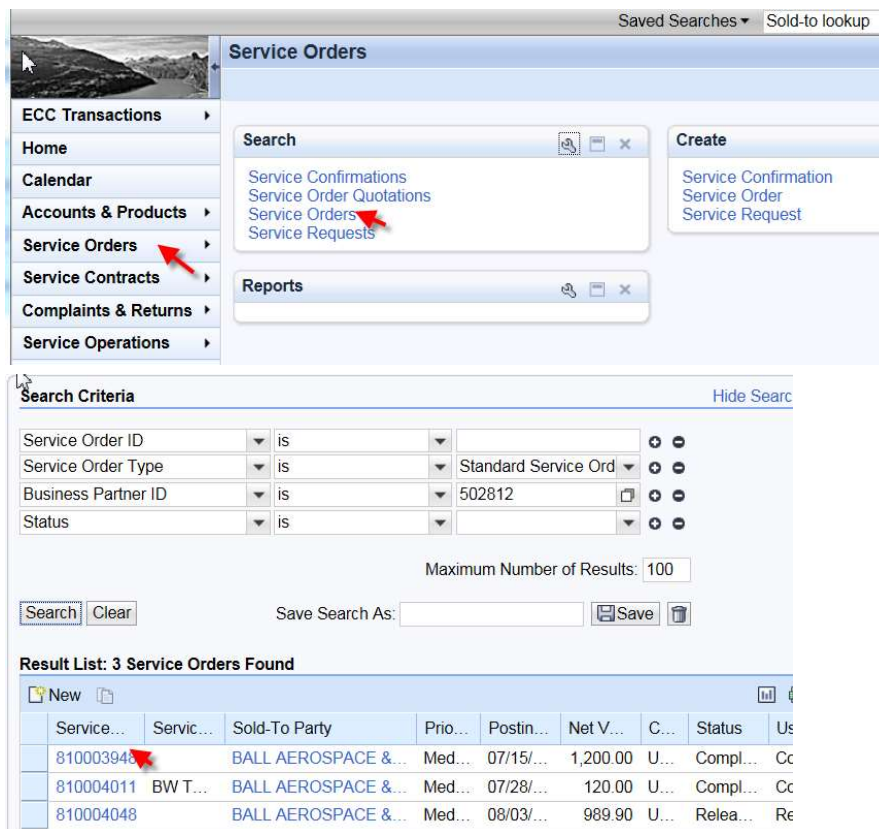
Maximum Number of Results: 100

Save Search As:

**Result List: 3 Service Orders Found**

Service...	Servic...	Sold-To Party	Prio...	Postin...	Net V...	C...	Status	Us
81000394		BALL AEROSPACE &...	Med...	07/15/...	1,200.00	U...	Compl...	Cc
810004011	BW T...	BALL AEROSPACE &...	Med...	07/28/...	120.00	U...	Compl...	Cc
810004048		BALL AEROSPACE &...	Med...	08/03/...	989.90	U...	Relea...	Re

6.22 Click on Service Order from within your assigned task OR search for the order from the left navigation bar by choosing "Service Orders>Search>Service Order"



Saved Searches  Sold-to lookup

**Service Orders**

**Search**

Service Confirmations

Service Order Quotations

Service Orders

Service Requests

**Reports**

**Create**

Service Confirmation

Service Order

Service Request

**Search Criteria** Hide Search

Service Order ID is

Service Order Type is  Standard Service Ord

Business Partner ID is  502812

Status is

Maximum Number of Results: 100


Save Search As:

**Result List: 3 Service Orders Found**

Service...	Servic...	Sold-To Party	Prio...	Postin...	Net V...	C...	Status	Us
81000394		BALL AEROSPACE &...	Med...	07/15/...	1,200.00	U...	Compl...	Cc
810004011	BW T...	BALL AEROSPACE &...	Med...	07/28/...	120.00	U...	Compl...	Cc
810004048		BALL AEROSPACE &...	Med...	08/03/...	989.90	U...	Relea...	Re

When additional items need to be added to an optimized order and the work is in the following status;

6.22.1 Released/Sent to Scheduling

	<b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b>	<b>Document Number:</b> <b>FS-AD 3221</b>	<b>Rev.:</b> <b>F</b>
<b>Title:</b> <b>ZINS Service Order (Create, Change, Reject)</b>		<b>Page #:</b> <b>12 of 15</b>	
<b>Procedure Owner(s) – list Functions:</b>		<b>Revision's Training Requirements – select one or both (per section #9):</b> <b>Awareness X      Formal</b>	

- 6.22.1.1 Add the additional sub-line item(s) in reference to the header line (i.e. parts, activities, etc.)
- 6.22.1.2 Change the status of the sub-line to “Released/Sent to Scheduling.”
- 6.22.1.3 Change the order status to “Create” and then back to “Released/Sent to Scheduling.”
- 6.22.1.4 Save the order.
- 6.22.2 Make other changes as appropriate by selecting the “Edit” tab of the appropriate assignment block.

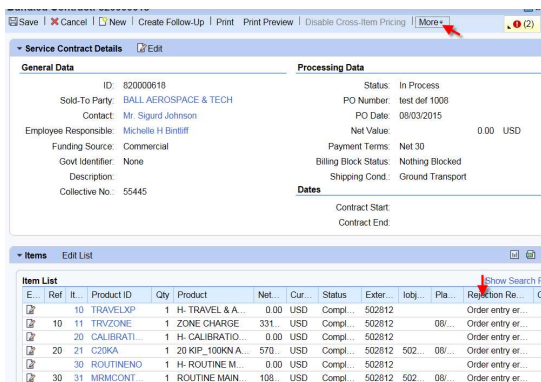
**CANCEL/REJECT-**


**Task:**

- 6.23 Open the order.
- 6.24 Select the Edit button in the Items assignment block of the order.
- 6.25 Select the appropriate rejection code for each applicable line item.
- 6.26 Skip to step 6.29.

**Order:**

- 6.27 If **all** items on the order need to be rejected (and no activity has begun),
  - 6.27.1 Select the “More” option from the top of the order and choose “Reject all Items” and then select the appropriate reason code.



	<b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b>	Document Number: <b>FS-AD 3221</b>	Rev.: <b>F</b>
	Title: <b>ZINS Service Order (Create, Change, Reject)</b>		Page #: <b>13 of 15</b>
Procedure Owner(s) – list Functions:		Revision's Training Requirements – select one or both (per section #9): <b>Awareness <u>X</u>      Formal</b>	

**7 ASSOCIATED QUALITY RECORDS – AS STATED IN THE QUALITY RECORDS LIST**

Required Record

**8 REFERENCE FORMS / TEMPLATES / DOCUMENTS**

Form / Template / Document Title	Location


**9 CURRENT REVISION'S TRAINING REQUIREMENTS**

Training requirements are determined by the document owner.

1. Select Awareness **and/or** Formal training requirements.
2. List (below) the functions or groups that require the training.

Select (mark X)	Training Type	Training Definition
	Awareness	Awareness training is conducted by communication, which is sent/delivered by the approver/author/owner of the document to the affected employees/groups.
X	Formal	Formal training requires the approver/author/owner to collect/store evidence that the affected employees/groups were trained.

**Functions/Groups that require Awareness to this procedure:**


	<b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b>	Document Number: <b>FS-AD 3221</b>	Rev.: <b>F</b>
	Title: <b>ZINS Service Order (Create, Change, Reject)</b>		Page #: <b>14 of 15</b>
Procedure Owner(s) – list Functions:		Revision's Training Requirements – select one or both (per section #9): <b>Awareness X_ Formal</b>	

- Awareness: List here the function(s) or group(s) that require Awareness training.
- Formal: List here the function(s) or group(s) that require Formal training.

## 10 REVISION HISTORY & APPROVAL

Revision History			
Rev	Description of Change	Author	Effective Date
F	Changes to support new Zinier Scheduling System	Michelle Bintliff	11/2/2023
E	Update notes on 6.13 setting travel item category	Michelle Bintliff	11/1/2022
D	Update flow diagram and 5.1 to reflect auto-created ZINS for all S3s	Michelle Bintliff	7/5/2022
C	Remove all reference to TSC role	ReAnna Skowronek	6/1/2020
B	Update to reflect additional settlement available for project training. Bi-yearly review of QMS	Michelle Bintliff	9/17/18
A	Original Release	Michelle Bintliff	3/1/16

Approval of Current Revision		
Name / Function	Signature	Date
Michelle Bintliff/ Sr Business Systems Analyst- Service	<i>Michelle Bintliff</i>	11/2/2023
Michelle Bintliff/ Sr Business Systems Analyst- Service	<i>Michelle Bintliff</i>	11/1/2022
Michelle Bintliff/ Sr Business Systems Analyst- Service	<i>Michelle Bintliff</i>	7/5/2022
Michelle Bintliff/ Sr Business Systems Analyst- Service	<i>Michelle Bintliff</i>	6/1/2020

	<p align="center"><b>QMS Procedure</b> <b>MTS Systems Corporation – MTS Test</b></p>	<p>Document Number: <b>FS-AD 3221</b></p>	<p>Rev.: <b>F</b></p>
<p>Title: <b>ZINS Service Order (Create, Change, Reject)</b></p>		<p>Page #: <b>15 of 15</b></p>	
<p>Procedure Owner(s) – list Functions:</p>		<p>Revision's Training Requirements – select one or both (per section #9): <b>Awareness X_      Formal</b></p>	

<p>Michelle Bintliff / Global Service Administration Manager</p>	<p align="center"><i>Michelle Bintliff</i></p>	<p align="center">9/17/2018</p>