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## 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
    - o 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.

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- 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 <u>delivery org</u> creates the ZINS in the

- <u>Retail Sales Org</u> 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."

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Service Orders		
Search		Create
Service Confirmations Service Order Quotations Service Orders Service Requests		Service Confirmation Service Order Service Request
Reports	بع 🗉 ×	

## 6.2 Select Transaction Type "ZINS."

		e e
Transaction Type	Transaction Type Description	
ZINS	SingleSett Serv. Ord	
ZOPT	Std. Service Order	

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

General Data		Processing Data	
ID: Installed Base* External ID: Site* Sold-To Party Contact: Description: Account Assignment Account Assignment	C Object Type."	Status: PO #- PO Date-" Paymin Terms: Net Value: Billing Block Status: Dates Earliest Start Date." Latest Start Date." Due Date."	Created D5/25/2015 Nothing Blocks
Click on the Input He	lp button to search IBase.		

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

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## External ID field.

					1
Search For:	Header Usin	ig Header Da	ita	-	
IBase ID		is	•		0
External ID	•	is	-	-	0
Description	•	is	•		0
Base Category	*	is	*	•	0

- 6.3.3 Select the record shown in the search results.
- 6.4 Enter Site Number and click [Enter]

Default

 ID

516916

507514

Function

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

Cancel				ıı ج
Default	ID	Function	Name	Address
<b>V</b>	34939	Contact Person	Charles Carpenter	Charles Carpenter / 1628 Northwo
	34917	Contact Person	William Woodcock	William Woodcock / 1628 Northwo
	34915	Contact Person	William Breyer	William Breyer / 1628 Northwood /
	34906	Contact Person	Vinnay Kothandapani	Vinnay Kothandapani / 1628 North
	34905	Contact Person	Tom Trudel	Tom Trudel / 1628 Northwood / Tr
	34900	Contact Person	Tom Lewczynski	Tom Lewczynski / 1628 Northwoo
	21026	Contact Person	ΤΗΟΜΔΟ ΕΡΟΗΜΔΝ	THOMAS EROHMAN / 1628 North
				Latest Start Date: 1

Name

Exova Defiance

Address

Exova Defiance / 1150 W.Maple / Tr

Exova Defiance / 1628 Northwood /

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

Ship-To Party/ServiceReci...

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

Ship-To Party/ServiceReci... Exova Defiance

.

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- Organizational Data 🛛 🕜 E	dit   Determinatio	n Log			
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:					
Salas Croup:					

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

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.

Note

Original Due Date:	11/12/2023
Scheduled Finish Date:	

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- 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.

ount Assignment	Dates	
Account Assignment Object Type:*	▼ Earliest Start Date:*	67
	Latest Start Date:*	63
	Due Date:*	6
	Note	
Sett.Account Assgmnt:		

**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.

td. Field S	erv Ord.: 810003	014 -	Notes	
Back   📴	lew 🛛 🗙 Cancel			
<b>T</b>	Text Type:*	0004	Usedes Note	
Text	43	7501	Scheduling and Work Notes	
		ZS02	Administrative Notes	

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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

зору попп						
Item	Product ID	Qty	Product	Item Category	Net	Α.
10	TRAVELXP 🗇	1	H- TRAVEL & ADMIN	Installation Expense	0.00	
	đ			ZCEQ Expense Header	5	
	n			ZCES Installation Expense		

• Do not manually enter numbers in the "item" column. They must be system assigned.

- Ite	e <mark>ms</mark> Ec	lit List					
	Show	All Ite	ms			-	
Ins	sert 📆	🗈   Cop	y from Te	mplate │ More≑			
ъ	Edit	Ref	Item	Product ID		Qty	Product
	2		10	TRAVELXP	٥	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 <u>Sub-line</u> 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 <u>and</u> 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

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- Inter-Company (performed by an MTS service employee located in another sales org)- Examples: INSTALLGENIC, SERVICEIC
- The following products should <u>not</u> be entered on the service order. They are for use on Time/Activity confirmations only;

ADMINTIME
LOSTTIMECUST
LOSTTIMEMTS

EXCEPTIONPART PURCHASEDPART TRAVELTIME

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

	Sho	w: All I	tems			*		
In	sert 🍞 [	ן Copy	from Templa	ite   More⊭				
8	Edit	Ref	Item	Product ID		Qty	Product	Item Cat
	2		10	TRAVELXP	đ	1	TRAVEL EXPENSE HDR	EXP Hea
	2	10	11	TRVZONE	đ	1	ZONE CHARGE	Travel Tr
	2		20	CALIBRATIONOP	đ	1	CALIBRATION SVC OPTIMIZED	CAL Hea
	2 🚤	20	21	C20KA	٥	1	20 KIP_100KN AXIAL L/C MTS	Billable S
					ð			
	(The				1.00			

- 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.

•	Reference	Objects Edit List		
Ins	sert 🧊			× ×
ъ	Actions	Installed Base ID	Installed Base Desc.	Component ID
	Û	8551		
	Û	0		0

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

Search For:	Component Usir	ng Header D	ata	-	1		
IBase ID	•	is	•			0	٥
IBase Category	-	is	•		-	0	•
External ID		is	•	502626	·	0	•
Description		is	-			0	•

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

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		Awareness	X_ Formal		

5									
Search For:	Component	t Usir	ng Header Data		-				
IBase ID		-	is	•		00			
Base Category		-	is	-		00			
External ID		-	is	-	500909	00			
Description			is	*		00			
IBase ID       • is       • o o         IBase Category       • is       • o o         IBase Category       • is       • o o         External ID       • is       • 500909       • o o         Description       • is       • o o       • o         Maximum Number of Results:       100         Search       Clear         Result List: 36 Installed Base Components Found         Installed       Compon       I       Description       Object ID       C       Va         5149       5150       General Dynamics       500909       C       11									
Search Clear Result List: 36	Installed Bas	e Co	mponents Found	Wab	Rimum Number of Results	C	Valid	Valid To	Sort
Search Clear Result List: 36 Installed 5149	Installed Base Compon	e Co	mponents Found Description General Dynamics	WIAD	Object ID	C	Valid	Valid To 12/31	Sort C003
Search Clear Result List: 36 Installed 5149 5149	Installed Base Compon 5150 41817	e Co	mponents Found Description General Dynamics SYSTEM	IVIAD	Object ID 500909 1000342	C C	Valid 11/04 02/05	Valid To 12/31 12/31	Sort C003
Search Clear Result List: 36 Installed 5149 5149 5149	Installed Base Compon 5150 41817 41818	e Co	mponents Found Description General Dynamics SYSTEM SYSTEM	IVIAD	Object ID 500909 1000342 1000343	C C C	Valid 11/04 02/05 02/05	Valid To 12/31 12/31 12/31	Sort C003
Search Clear Result List: 36 Installed 5149 5149 5149 5149 5149	Compon 5150 41817 41818 41819	e Co	Description General Dynamics SYSTEM SYSTEM SYSTEM	IVIAD	Object ID 500909 1000342 1000343 1000344	C C C C	Valid 11/04 02/05 02/05 11/11	Valid To 12/31 12/31 12/31 12/31	Sort C003

**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.;

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- 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 intercompany 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

		Save	d Searches · Sold-to lookup
	Service Orders		
ECC Transactions			
Home	Search	ع 🗉 ×	Create
Calendar	Service Confirmations		Service Confirmation
Accounts & Products 🔸	Service Orders		Service Order Service Request
Service Orders 💊 🔸	Service Requests		
Service Contracts	Reports	N = ¥	
Complaints & Returns +		~ 1 ~	
Service Operations			

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Search Chiena										Hide Se	earc
Service Order ID	)	-	is	*				c			
Service Order Ty	/pe	-	is	-	Stan	dard Ser	vice Ord	- 0			
Business Partne	r ID	-	is	-	5028	12		0 0			
Status		-	is	-				- 0	0		
Search Clear			Save Search As:				8	Save	Û	]	
Search   Clear Result List: 3 Se	ervice Orde	ers Foi	Save Search As:					Save	Û	]	ភាត
Search Clear	ervice Orde	ers Foi	Save Search As:	Prio		Postin	NotV	Save	Û	Status	J (
Search Clear Result List: 3 Se New C Service	service Orde	Sold-	Save Search As:	Prio	F	Postin	Net V.	Save	1	Status	I (
Clear Clear New C Service 810003948	Servic	Sold-BALL	Save Search As: und To Party . AEROSPACE &	Prio	F	Postin 17/15/	Net V. 1,200.	Save C 00 U		Status Compl	Us Cc
Search         Clear           Result List: 3 Set         P           New         P           Service         810003943           810004011         810004011	Service Orde	Sold- BALL	Save Search As: und To Party AEROSPACE & AEROSPACE &	Prio Med Med	F I C I C	Postin 17/15/ 17/28/	Net V. 1,200. 120.	Save C 00 U 00 U		Status Compl	Us Cc Cc

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

					Sa	ved S	earches -	Sold-to I	
	Serv	ice Orders							
The state of the s									
ECC Transactions									
Home	Sea	rch			ع 🗉 ×		Create		
Calendar	Sei	vice Confirmations					Service Co	nfirmation	
Accounts & Products >	Sei	rvice Order Quotatio	ns				Service Order Service Reques		
Service Orders 💊 🔸	Sei	rvice Requests				1.0			
Service Contracts	Der					5			
Complaints & Returns	Rep	onts			<i>କ</i> ି ⊟ ×				
Service Operations	_					1			
Search Criteria							Hide S	earc	
Service Order ID	•	is	-			0 0			
Service Order Type	-	is	•	Standard Ser	rvice Ord 👻	0 0	•		
Business Partner ID	-	is	-	502812	٥	0 0			
Status	•	is	•		•	0 0	>		
			Max	kimum Numbe	r of Results:	100			
Search Clear		Save Search As:			Sav	/e f	Ì		
							27721		
Result List: 3 Service Orde	rs Fou	Ind							
New 🛅							0	61 (	
Service Servic	Sold-	To Party	Prio	Postin	Net V	C	Status	Us	
810003948	BALL	AEROSPACE &	Med	I 07/15/	1,200.00	U	Compl	Cc	
810004011 BW T	BALL	AEROSPACE &	Mec	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

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- 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.

Service Cont		La Edit										
General Data					Proce	essing Data						
	ID:	820000618					Status:	In Proce	\$\$			
Sold	To Party:	BALL AERO	DSPACE & TECH		PO Number: test def 1008							
	Contact.	Mr. Sigurd	Johnson		PO Date: 08/03/2015							
Employee Res	Employee Responsible: Michelle H Bintliff					Ne	t Value:	0.00			USD	
Funding Source: Commercial					Payment Terms:			Net 30				
Govt	Govt Identifier: None						Billing Block Status			Nothing Blocked		
De	scription:				Shipping Cond.:			Ground Transport				
Colle	ctive No.:	55445			Dates	5						
						Contra	ct Start:					
						Contra	act End:					
items Edit	List											b
										Sho	w Searc	hl
Item List						01.1	Exter	lobj	Pla	Rejection	1 Re	1
Item List E Ref It.	. Product	ID Qty	y Product	Net	Cur	Status						
Item List E Ref It.	. Product	ID Qth .XP f	Product H- TRAVEL & A	Net 0.00	Cur USD	Compl	502812			Order en	try er	
Item List E Ref It. 22 10 1	Product     TRAVEI     TRVZO	ID Q6 JXP 1 NE 1	Product 1 H- TRAVEL & A 1 ZONE CHARGE	Net 0.00 331	Cur USD USD	Compl	502812 502812		06/	Order en Order en	try er try er	
Item List E Ref It. 22 10 1 22 2	<ul> <li>Product</li> <li>TRAVEI</li> <li>TRVZOI</li> <li>CALIBR</li> </ul>	ID Qb LXP NE ATI	Product 1 H- TRAVEL & A 1 ZONE CHARGE 1 H- CALIBRATIO	Net 0.00 331 0.00	Cur USD USD USD	Compl Compl	502812 502812 502812		08/	Order en Order en Order en	try er try er try er	
Item List           E         Ref         It.           □2         10         1           □2         2         2           □2         20         2	Product 0 TRAVEI 1 TRVZOI 0 CALIBR 1 C20KA	ID Qb LXP NE ATL	Y Product     H- TRAVEL & A     ZONE CHARGE     H- CALIBRATIO     20 KIP_100KN A	Net 0.00 331 0.00 570	Cur USD USD USD USD	Compl Compl Compl Compl	502812 502812 502812 502812 502812	502	08/	Order en Order en Order en Order en	try er try er try er try er	
Item List E Ref It. 27 10 1 27 20 2 27 20 3	<ul> <li>Product</li> <li>TRAVEI</li> <li>TRVZOI</li> <li>CALIBR</li> <li>G20KA</li> <li>ROUTIN</li> </ul>	ID Qh XP NE ATI	y         Product           1         H- TRAVEL & A           1         ZONE CHARGE           1         H- CALIBRATIO           1         20 KIP_100KN A           1         H- ROUTINE M	Net 0.00 331 0.00 570 0.00	Cur USD USD USD USD USD USD	Compl Compl Compl Compl Compl	502812 502812 502812 502812 502812 502812	502	08/ 08/	Order en Order en Order en Order en Order en	try er try er try er try er try er	

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## 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:

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Procedure Owner(s) – list Functions:       Revision's Training Requirements – select (per section #9):         Awareness X       Fetee		ements – select one or both X Formal	

- 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
С	Remove all reference to TSC role	ReAnna Skowronek	6/1/2020
В	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	Michelle Bintliff	11/2/2023	
Michelle Bintliff/ Sr Business Systems Analyst- Service	Michelle Bintliff	11/1/2022	
Michelle Bintliff/ Sr Business Systems Analyst- Service	Michelle Bintliff	7/5/2022	
Michelle Bintliff/ Sr Business Systems Analyst- Service	Michelle Bintliff	6/1/2020	

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Michelle Bintliff / Global Service Administration Manager	Michelle Bintliff	9/17/2018