CONTENTS

Click within the Table of Contents, select **Update Table > update page numbers**

1   PURPOSE

1.1   The Projects ON Demand (POND) system's purpose is to house key project information and quality records for a project team or sales team to reference.

Link name = http://projects.mts.com/pond/

2   SCOPE – APPLIES TO WHERE & WHEN THE WORK INSTRUCTION IS USED

2.1   This work instruction applies to MTS-Test Project Engineers leading ZPRJ projects to document project information.
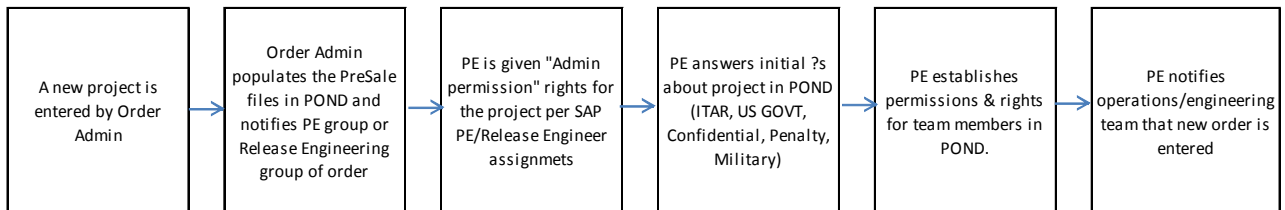
3   DEFINITIONS AND ACRONYMS (IF NEEDED)

3.1   POND   Projects ON Demand (http://projects.mts.com/pond/)
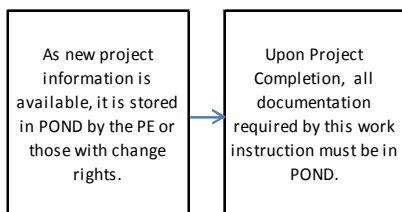
3.2   PE   Project Engineer

4   GRAPHIC (IF NEEDED)

New Project….(getting started)

A new project is entered by Order Admin	→	Order Admin populates the PreSale files in POND and notifies PE group or Release Engineering group of order	→	PE is given "Admin permission" rights for the project per SAP PE/Release Engineer assignmets	→	PE answers initial ?s about project in POND (ITAR, US GOVT, Confidential, Penalty, Military)	→	PE establishes permissions & rights for team members in POND.	→	PE notifies operations/engineering team that new order is entered

On-going and concluded project

As new project information is available, it is stored in POND by the PE or those with change rights.	→	Upon Project Completion, all documentation required by this work instruction must be in POND.

.

5   RESPONSIBILITIES

5.1   Project Engineering

5.1.1   The Project Engineering Management team has the responsibility to identify the project engineer via SAP assignment of the project engineer.

5.1.2   The Project Engineer has the responsibility to populate the fields/folders with the required information during the life of the project in a timely manner, especially if ITAR or Confidential in nature.

5.1.3   The Project Engineer has the responsibility to populate the quality records folders with required documents as they become available and to verify all quality records are stored prior to project close.

5.1.4   The Project Engineer has the responsibility to communicate updates to the project to the project team in a timely manner with information populated into POND folders.

6 INSTRUCTION

6.1 Assigning the Project in SAP.

    6.1.1 An order (requiring a PE) is received by Project Engineering management from Order Administration.

    6.1.2 Project Management arranges for the Project Engineer's name to be populated in SAP, which will auto-populate the POND administrative rights for the specific project.

6.2 Entering Initial Information for the Project Engineer

    6.2.1 The assigned Project Engineer enters initial project information in 3 main areas prior to releasing communications to the project team.

        6.2.1.1 Security Questions

        6.2.1.2 Documents Tab

        6.2.1.3 Permissions Tab

    6.2.2 Security Questions

        6.2.2.1 The assigned Project Engineer enters Yes/No to each of the sections within the undefined non-SAP data for the specific project.

            6.2.2.1.1 US Government Contract
                6.2.2.1.1.1. Select yes, if special timecard reporting is needed.

            6.2.2.1.2 Military Contract
                6.2.2.1.2.1. Select yes, if the contract is associated with the military (from any country)

            6.2.2.1.3 ITAR Control
                6.2.2.1.3.1. Select yes, if the project contract states ITAR re-quirements or if determined ITAR per internal personnel.

            6.2.2.1.4 Penalty Clause
                6.2.2.1.4.1. Select yes, if any penalty conditions exist.

            6.2.2.1.5 Confidential
                6.2.2.1.5.1. Select yes, if the contract states requirements to keep customer name confidential.

        6.2.2.2 Select the 'Update' button upon completion of entries.
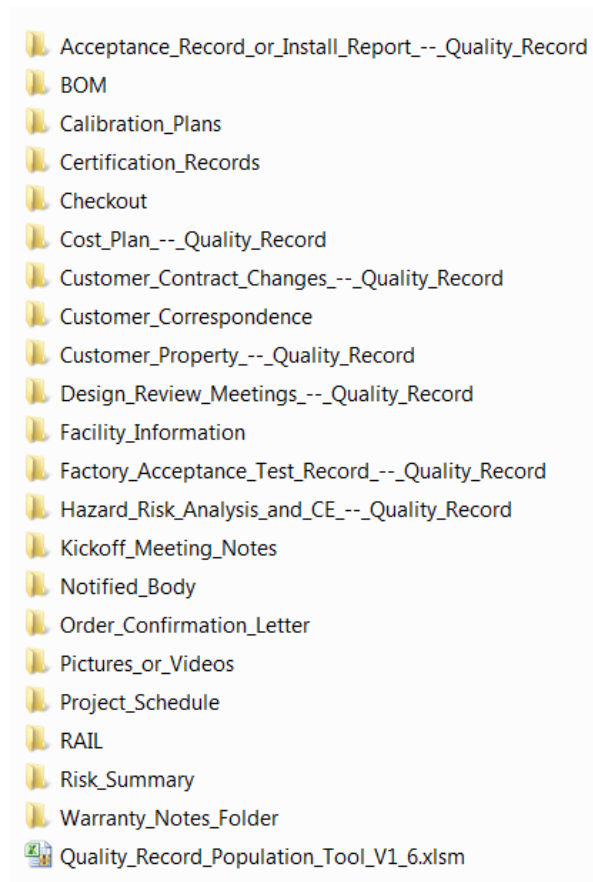
6.2.3   Documents Tab

6.2.3.1 For Custom/ETO projects, the folders under 'Pre-Sale Files' is populated with the information by Order Admin. Additional folders can be added, as needed.

6.2.3.2 The folders under 'General Project Files' are populated with information, as information becomes available. Noteworthy are the file folders with the title 'Quality Record' at the end. PEs or designates are required to populate Quality Record files as they are available and before project close. If the particular 'Quality Record' is not appropriate for the project, enter a file that says 'Not Required' with name and date to indicate the decision that was made. Additional folders can be added, as needed.

(example for general folder structure)

- Acceptance_Record_or_Install_Report_--_Quality_Record
- BOM
- Calibration_Plans
- Certification_Records
- Checkout
- Cost_Plan_--_Quality_Record
- Customer_Contract_Changes_--_Quality_Record
- Customer_Correspondence
- Customer_Property_--_Quality_Record
- Design_Review_Meetings_--_Quality_Record
- Facility_Information
- Factory_Acceptance_Test_Record_--_Quality_Record
- Hazard_Risk_Analysis_and_CE_--_Quality_Record
- Kickoff_Meeting_Notes
- Notified_Body
- Order_Confirmation_Letter
- Pictures_or_Videos
- Project_Schedule
- RAIL
- Risk_Summary
- Warranty_Notes_Folder
- Quality_Record_Population_Tool_V1_6.xlsm

	QMS Work Instruction MTS Systems Corporation – MTS Test	Document Number: **PE-004**	Rev.: **D**
MTS		Document ID: **10118**	
Title: **Projects ON Demand (POND)**		Page #: **5 of 8**	
Work Instruction Owner(s) – list Functions, not persons: **Project Engineering**			

6.2.4   Permissions Tab

6.2.4.1 The assigned Project Engineer will have Admin rights for the given project upon SAP assignment.

6.2.4.2 The Permissions Tab should be populated with those people on the Project Team that need to be advised of project status.   The Communications mechanism within POND may be used to communicate. Select the 'edit' button to make changes to user rights.

6.2.4.3 There are 3 choices to select for Project rights -- Admin, Change, and Read – all of which are defined per a POND excerpt shown below. Assignments of rights are up to the project engineering and typically rights are as follows: Project Engineer (Admin), Systems Engineer (Change), All other team members (Read).

Admin
» Granted to the PE (directly linked to SAP assignment)
» Granted to PE management
☑ *Should* be only limited to the Project Engineer

Change
» Granted by the PE – only to certain members of the team
» Useful when team members need to change folder contents
☑ Critical to *limit* use of 'Change' rights (quality records)

Read
» Useful when 'Confidential' or 'ITAR' requires limited viewing
» Typically granted to team members to view information
☑ Critical to request *HR/Mgmt* assistance for ITAR project permissions

- **Admin** - allowed to: assign or delete users/groups with ALL permission levels, edit data, upload files
- **Change** - allowed to: assign or delete users/groups with READ permission, edit data, upload files
- **Read** - has read-only access to the data and files

VERIFY REVISION BEFORE USE   PRINTED COPY IS NOT CONTROLLED   Print date: 2/14/18
Proprietary – Use pursuant to instruction per MTS Systems Corporation

Template ID 10001 Rev A

6.2.4.4 To enter people into the Permissions Users group, enter one or more letters from the person's last name and hit the Search Users button. The person will then appear in the 'pick' list, then identify the level of rights to assign. People may be deleted from the assigned users segment by selecting the 'delete' button.

nafs [Search Users]   A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

◯ Add Groups - Enter one or more letters to search by group name.

[ ] [Search Groups]   [Refresh Folder Permissions]

Users

	Search Results			Team Members	
	Name			**Name**	**Role**
Admin Change Read	Nafstad, Erik W		Delete	Christopherson, Jason A	Change
			Delete	Hanauska, Gary P	Change
			Delete	Lovald, Jan-petter (Peter)	Admin
			Delete	Lucachick, Glenn A	Change
			Delete	Malovrh, Adam J	Change
			Delete	Moen, Michael M	Admin
			Delete	Petersen, Don C	Change
			Delete	Senft, Victor J	Change
			Delete	Sherman, William P	Change
			Delete	Sunderman, Marlin J	Change
			Delete	Warner, Jay S	Change
			Delete	Weber, Frank J	Change

6.2.4.5 Super-Admin rights are given to IT POND developers, members of project engineering management and order entry.

6.2.4.6 If the Project is selected as 'confidential' or 'ITAR', then only those people with User Rights (Admin / Change / Read) will be allowed to view the project.

6.2.4.6.1 Otherwise, all projects grant general read access.

6.2.4.7 If a team member is not available on the pick list, then send a message to the person listed on the POND-HELP page under 'access granting'.
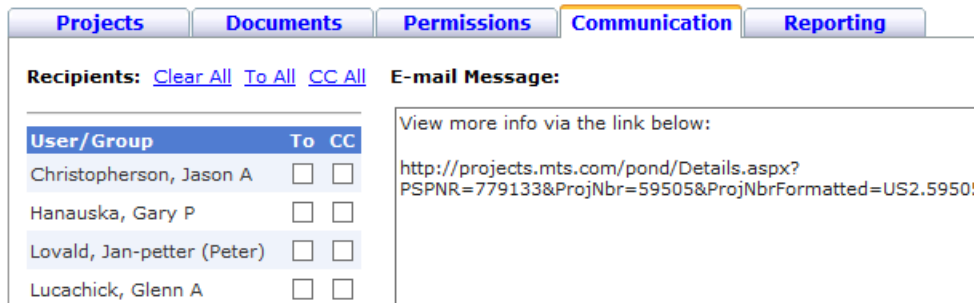
6.3   Communicating Project Information

    6.3.1   As project information becomes available, the project engineer can use POND to announce changes via the 'Communications' tab by identifying all people to which the message should be sent with either 'To' or 'CC'

        6.3.1.1 The default listing for communications will be 'Omit'.

        6.3.1.2 A message about the change can be typed in the right-hand box. The message will be delivered to the project team via MS Outlook.

6.4   Expectation & Rollout

    6.4.1   The Project Engineer will ensure the appropriate Quality Records are stored in the folders upon completion of the project.

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

Required Record	QMS Web Location
N/A	

8   REFERENCE FORMS / TEMPLATES / DOCUMENTS

Form / Template / Document Title	QMS Web Location
N/A	

9   CURRENT REVISION TRAINING REQUIREMENTS

Training requirements are determined by the document owner.

LMS Course Number	Read & Test	Instructor Evidence	Functions or groups that require this training
N/A			

10   REVISION HISTORY & APPROVAL

Revision History			
Rev	**Description of Change**	**Author**	**Effective Date**
A	Initial Release	M. Coburn	Apr 20 2009
B	Added "Customer Damaged Specimen" Quality Records to the list of folders	M. Coburn	May 19 2009
C	Added Document #; Updated folder populating process and revised communication process	A. Rivers	Dec 21 2009
D	Removed references to JOP. Removed references to ETO/Custom/Fastlane as they are all treated equally. Updated clips of folder structure.	D.Goetsch	2/8/2018

Required Approvers for Current Revision		
Name	**Function**	**SharePoint Approval**
Dan Goetsch	Project Engineering Manager	2/14/2018 10:22 AM