## ASSET **TAGGING AND** MANAGEMENT SOLUTION



## **Parker Tracking System**

Customer Quick Reference Guide

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## Parker Tracking System (PTS) Customer Quick Reference Guide

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# Fast.Easy.Exact.

## Parker Tracking System (PTS)

Parker Tracking System (PTS) is an asset tagging and management solution developed, hosted and supported by Parker Hannifin. PTS can be used to tag and manage Parker and Non-Parker parts. This guide was created for authors and owners of PTS enabled products to use as a reference.

#### **Create an Account**

#### GUEST ACCOUNT (Mobile Only)

Provides basic access to the most commonly used features in PTS and access to public product documents

- 1. Download the mobile app
- 2. Choose "Create Account" and fill out registration details

Please Note: Some application functionality and record views are limited for guest accounts.

#### **CUSTOMER/DISTRIBUTOR**

For enterprise users seeking record access and asset management capabilities, fill out PTS Account Request form at <u>Solutions.Parker.com/PTS-Account-Request</u>

#### Login

#### **PTS MOBILE APP**

- If you have an account in the PTS web application, you may use the same User ID and password to access PTS Mobile
- You can also create a Guest User ID and password to login (see above)

#### PTS WEB APPLICATION

- Not accessible to Guest accounts
- Go to <u>www.parker.com/pts</u>
- Click "Login to PTS"
- Enter User ID and password to login







#### **PTS Mobile Asset View Guide**

#### **Home Screen**

If you have an account in the PTS web application, you may use the following in the PTS Mobile app.

- 1. Menu
- 2. Create Asset
- 3. Scan Asset
- 4. Fast Swap
- 5. My Assets
- 6. Notifications
- 7. Recent Items



PTS Mobile Home Screen

#### **Product Overview**

If you have an account in the PTS web application, you may use the following in the PTS Mobile app.

- 1. Back Arrow
- 2. Spare Parts
- 3. Service 9. Specifications
- 4. Documents
- 10. Materials

7. HOME Button

8. Application

- 5. Owner
- 6. Action Bar

Please Note: Some application functionality and record views are limited for guest accounts.



PTS Mobile Product Overview Screen

#### Create Asset (Mobile)



1. Select 'Create Asset' from the home screen.



2. Scan a pre-printed PTS tag in your possession (or enter the number manually) to create an asset with that ID.



3. If you do not have a PTS ID or tag with you, select the "Request a New PTS ID" button and the system will generate a new PTS ID for you.

PTS ID		
Y50K7HRL		
Create Date		
01 Jun 2020		
Product Type		
Product Type	~	
* Required		
Part Number		٦
		J

4. With your ID selected, complete the remaining product selection fields to finish creating your asset.

Spare Parts	>	Application	>
Service	>	Specifications	>
Documents	>	Materials	>
Owner	>		

5. If preferred, select the "Continue to Product Details" button to open the full asset details so any additional information can be added.

#### **Register Products (Mobile)**



1. Select "Scan Asset" from the home screen.



4. Set a service date.



7. The asset will be added to the My Assets view.



2. Scan the barcode of your PTS tag with your camera or type the PTS ID.



5. Set product replacement date or accept the recommended date, which adds a reminder to Notifications.



8. Receive an email confirmation after completing asset registration.



3. Select the Register button.

Application	
Application	
Column X	-
Max of 40 characters	8/40
Row X	-
Max of 40 characters	5/40
Skid 12345	
Pump 123	
Select inlet	
00000	00
Rack to Overview	7.44

6. Update product location information.

## Create Service Template (Mobile)



1. Manage your Service Templates in the Settings menu.



2. Create and edit your list of Service Templates.



3. Add a template name, description product type and a list of questions.



4. Open the Service icon to manage service events for an asset.

#### Schedule Service (Mobile)



1. Add a new event or view your scheduled and completed events.



2. Choose an event type, service date and service template.



3. Save for later completion or continue through the question prompts.

#### Perform Service (Mobile)



1. Update the status to Pass or Fail to complete the event or Pending to keep it open.



2. Save your changes to the event.

## Buy Now (Mobile)

Buy PTS tagged products directly from PTS Mobile



1. Select the 'Buy Now' button which will appear under 'Part Number' on the Product Overview page for products available for purchase.

#### **Product Documents & Links**

#### **PTS WEB**

- Type a PTS ID into the Search box to bring up its record
- Choose the Application Data tab and any documents &
- links will be listed in the Attachments sectionYou may also add new attachments or URL's to the
- You may also add new attachments or URL's to the record

#### **PTS MOBILE APP**

2. Enter quantity, shipping information,

3. The product(s) will be shipped directly

III AT&T WI-FI ♥ 5:14 PM

\$75.45/ea

to you.

Hose Assembly | PTS ID: 5NPISCG4

Buy N

and payment method.

ଏ ନା 56% 👀

PTS Mobile allows the user to view previously attached files and URL links. PTS mobile also allows access to any support files or documents for the product linked from Parker.com.



Login, choose "Scan PTS", scan or type a PTS ID.



Open Links and Files in the Documents section.



Select the download icon to save locally or share.

#### **Product Documents & Links (Continued)**

5:28	Insert Link  Name Product Information  * Regulate Utit: - Intps://www.myproduct.com/info * Regulate @ Dublic  * Dublic	Insert Link  Product Information  * Required  Uttl: https://www.myproduct.com/info  * largered  © F Save Attachment Success
Hydraulic Hoses, Fittings and Equipment Rereat Incode	Private	F Save Attachment Success
Crimo systems vou can trust	Cancel	Curcel

You may view all public attachments and private attachments associated to your account and add or edit URL links if authorized.

#### Fast Swap (Mobile)

This feature is used to replace one PTS tagged asset with another.



1. Select "Fast Swap."



2. Scan the current PTS ID being replaced.



3. Scan the new PTS ID.



4. View location information and set a replacement date. Complete by selecting 'Fast Swap Items.'

PTS ID: LPS8G2AH has been replaced with PTS ID: 7WEMPGN3

OK

#### PTS Pro PTS Losential Message Center Supp PTS Pro Print Jahos SEARCH CM exception Fact form Pact form PTS Reporting Cutomer Meater Import Create New PTS ID -Select Product. •

Fast Swap (Web)

1. Select "Fast Swap" from the PTS Essentials dropdown menu.

	map			
Current P	TS 10 UP50024H	New PTS ID	7WEMPOND	
Support				

2. Enter the current and new PTS IDs.

	Current PTS ID LPDRC2AN	Tere 1 7WD
NFG Part	VELLINTPONEDEDER	VELOTIONAGEOGE
Leadies 1	ENGINE COOLANT SYSTEM	ENERNE COOLANT SYSTEM
Location J	071136AC	021135MC
Equipment	Machine 123	Nucleine 133
Vin / Serial #	45205386030	45205389030
Next Impection Date	05/04/2015	11/04/2020
Next Replacement Cate	11,/04/2018	23-24-2222 I

3. Review "Fast Swap" details and set new service dates.

4. Confirm "Fast Swap."

## Edit Asset Information (Mobile)



1. Scan a PTS ID.



4. Add or update information in the fields listed.



2. Open a section highlighted in gold.



5. Choose Save.

## Edit Asset Information (Web)

To update Asset information, search PTS ID and open the Application Data tab.

Update the asset's location,	Customer Info Originators Order Info Bill of Haterials Alt Bill of Material Application Data Location 1 Welding Shop • I costion 2 Lot 1 Equipment VIR/Machine#	)Replacement Details
equipment or	Application Port  A  Valve	Control Valve C
VIN/Machine#.	Media Petrolium-Based Hydraulic Oils 🔻 Media Temp 33	8°C-68°C (100°F-154°F)
	Environment         OUTSIDE COMPARTMENT         Environment Temp         04           Pressure         3000-4000 psi (207 - 276 bar)         Bend Radius         Bend Radius	°C-37°C (32°F-99°F) ▼
Set service or	Criticality • Repair	Shop ® Field
replacement dates.	Inspect Date 0 T From Create Date Inspection Template Standard Hose Inspection 1 T Inspection Count 0	▼ 3/14/2013
	Replacement Date 0 V From Create Date	▼ 3/14/2013
Add attachments	Linked File Choose File No file chosen	Upload
to the record.	Link Text URL http://	Add Link
	File Name	Date Size Type



3. If section allows editing, choose the Edit button.

#### **Notifications**

PTS desktop and mobile app feature several options to receive notifications for pending service events and scheduled replacements

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•

	PTS: Noti	fication O	n Upc	oming Inspec	Events Summa	Notification
From:	donotreply	@parker.com			32 Past Due	0 Service Soon
To:	donotrep	ly@parker.co	m		Service Events	
This is an au	tomated mess:	age from th	e Park	er Tracking Sy	PTS ID: 31.3555M Devet Type: Inspection	Dae Date: 12 Jul 2014 Event Status: Past Dae
Past Du	e Replace	ments			PTS ID: SYH322WT Event Type: Inspection	Due Date: 03 Sep 2014 Event Status: Past Due
Click Here to	View in PTS (A	A.I.M.)			PTS ID: AVVCWI Z.I	Due Date: 03 Sep 2014
PTS ID	Location 1	Location 2	Crit	Equipmen	Event Type: Inspection	Event Status: Past Dae
HW8WNYN	Platform 3	<b>Building 2</b>	High	123XYZ	072.05	Due Date:
.68KFK1R	Platform 3	Building 2	High	123XYZ	 FIGHT.	C3 Sep 2014
SLXSEDR			F	Field Truck Mod	Inspection	Past Due
BK9NG1C	Welding Shop	Building 2	High	Pipe Handle	PTS ID: GEVENTED	Due Date:
A46NPWK	Platform 2	<b>Building 2</b>	High	Pipe Handle	Event Type: Inspection	Event Status: Past Day
AQ04E1V				Aztec Trench		
OPC4YW2	Platform 3	Building 2	High	123XYZ	PTS ID: GVIC0E529 Event Type:	Due Date: 03 Sep 2014 Event Status:
					Inspection	Patho

32 Past Due	y O Service Soon	3 Scheduled
Service Events		
PTS ID: STJ3555M	Due Date: 12 Jul 2014	
Event Type: Inspection	Event Status: Past Due	•
PTS ID: SYH223WT	Due Date: 02 Sec 2014	
Event Type: Inspection	Event Status: Past Due	•
Event Ty	pe: Inspection	
Status:	Past Due	
Equipment Inform	nation	
Location 1:	Plant 2	
Location 2:	Machine 1: CNC	Lathe
	XXXXPTS1234	
Vin/Machine #		
Vin/Machine # Equipment	CNC Lathe 1102	



#### **Service & History**

PTS provides several powerful tools for creating, scheduling, and performing service management requests.

PTS Mobile Notification Screen

- Create Custom Templates
- Set Schedule Reminders
- Perform and Capture Events

									A Bill	Sayavich	Account Info	Log Off
-Park	41									Eng	lish (US)	~
Admin PTS	Pro	PTS Es	sential	Message	Center (3)	Supp	ort					
ASSET MAN	NAG	EMEN	т									
PTS ID Insp. Template		Hydraulic H	ose: Outboa	rd								
Coupling Corrosion	O Yes	) No	0 N/A									
Coupling Leakage	O	No	O N/A									
Cover Abrasion	O Yes		0									
Support Correct	() Yes	O No	O N/A									
Cover Cuts	O Yes	No	O N/A									
Inspection Status		• Pass	Fail									
Notes	[	Hose exh	ibita a	me light	0							
Linked File	1							Browse	Upload	]		
					C	ancel	Done					



Example: PTS Asset Inspection Template Web Choose Service icon to display scheduled and completed service events

Step-by-step instructions can be found here: https://parkertracking.atlassian.net/wiki/spaces/PS/pages/29032460/PTS+Pro+Performing+a+Service+Event

### Find Distributor (Mobile only)

Search Parker channel partners based on region and product authorization.



1. Enter appropriate county, city, and zip.



2. List view sorted by distance.



3. One location is selected in map view.

#### Languages

The Parker Tracking System web application currently supports 12 languages, including English (US), Chinese, Czech, English (UK), French, German, Italian, Korean, Portuguese, Spanish, Japanese and Russian. We now offer this same support to our mobile users with extended language preferences to support Italian, German, French, Spanish, Danish, Swedish and Finish with more languages to follow. You can easily access these by selecting a supported language on your device and the PTS mobile app will convert automatically.



#### Support

PTS offers a variety of self help or guided help solutions to ensure full support for desktop, web and mobile. Choose a method that best serves your needs.



Parke	ENGINEERING YOUR SUCCESS.
contact support,	please send your requests to supportigipankertracking attission.net, or use the Contact Us link from within the PTS Application.
CONTACT FORM	
Comments? Questions' will be glad to help.	Complete the flows and a member of our support laters
difficit are reached.	
Name	Enar Ip P13 Expend
Conpany	Search - Peans failed - •
Email Address [of a charge consudered Phone Number [005-005-0000	
	100

PTS Support Center with Keyword Search

PTS Support Ticket Form



To open a request or question with our global support team, please send an email to <u>support@parkertracking.atlassian.net</u>

Parker.com/PTS

#### Parker Hannifin

#### Asset Integrity Management:

The Parker Tracking System is an innovative component-tagging and asset management solution used to record, manage and retrieve all of your critical asset information. ParkerHannifin CorporationGlobalHeadquartersCleveland, OH 44124phone216 896 3000fax216 896 3129

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