ASSET TAGGING AND MANAGEMENT SOLUTION

Parker Tracking System

Customer Quick Reference Guide   Version 3/25/21

Parker

ENGINEERING **YOUR** SUCCESS.

Parker Tracking System (PTS) Customer Quick Reference Guide

Table of Contents

PTS

Parker Tracking System

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 Solutions.Parker.com/PTS-Account-Request
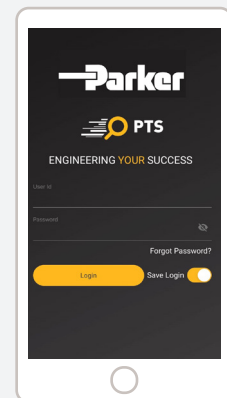
Login

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 www.parker.com/pts
- Click "Login to PTS"
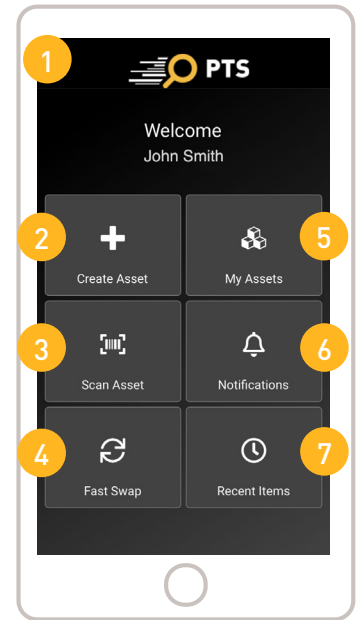- Enter User ID and password to login

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

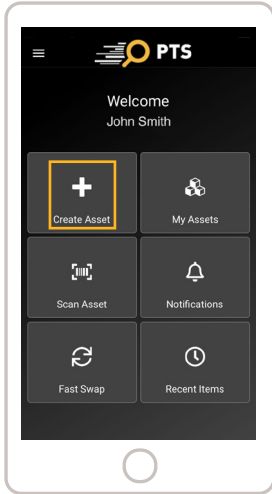PTS Mobile Home Screen

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	7. HOME Button
2. Spare Parts	8. Application
3. Service	9. Specifications
4. Documents	10. Materials
5. Owner	
6. Action Bar	

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

PTS Mobile Product Overview Screen
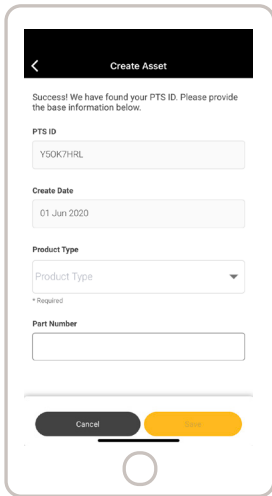
Create Asset (Mobile)
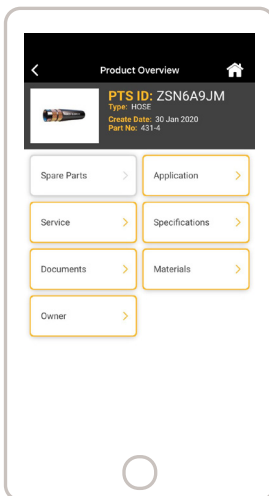

1. Select 'Create Asset' from the home screen.
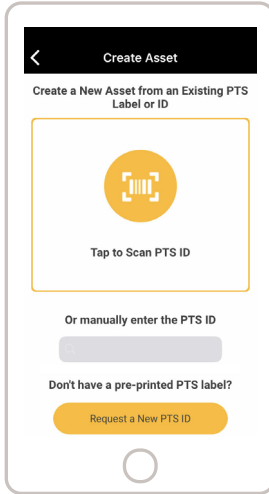
2. Scan a pre-printed PTS tag in your possession (or enter the number manually) to create an asset with that ID.
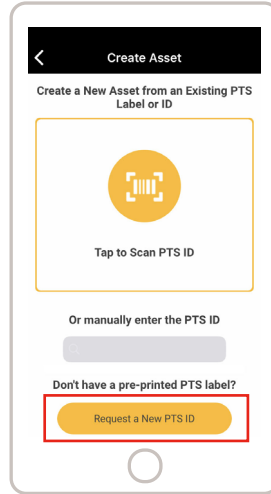
3. If you do not have a PTS ID or tag with you, select the "Request a New PTS ID" button and the system will generate a new PTS ID for you.
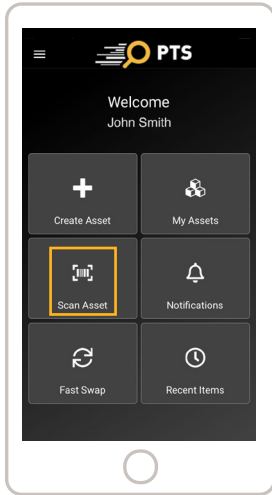

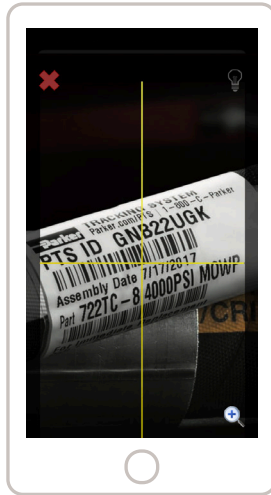4. With your ID selected, complete the remaining product selection fields to finish creating your asset.

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

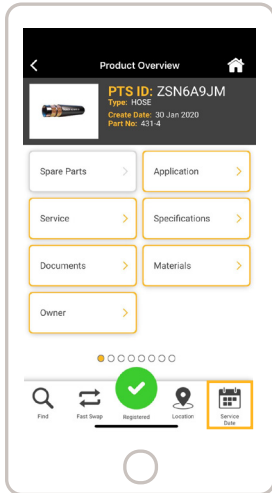# Register Products (Mobile)

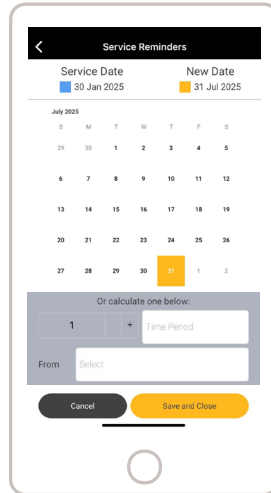1. Select "Scan Asset" from the home screen.

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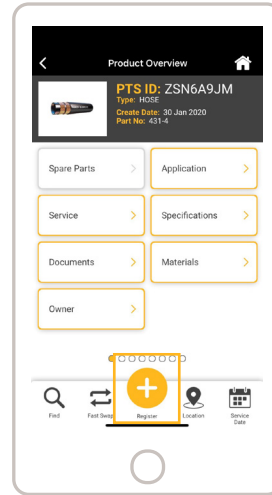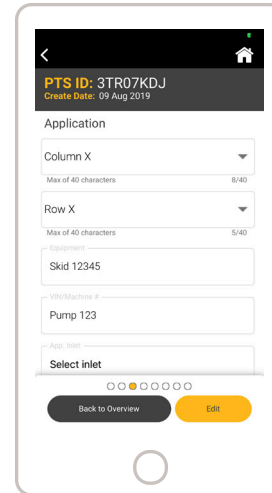

3. Select the Register button.
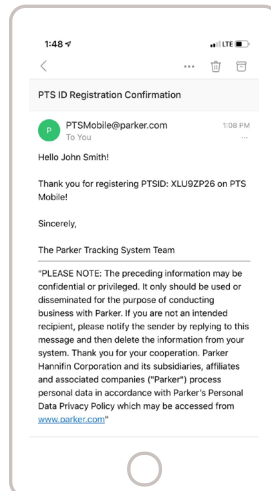

4. Set a service date.

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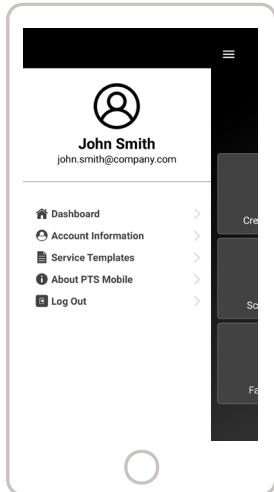

6. Update product location information.

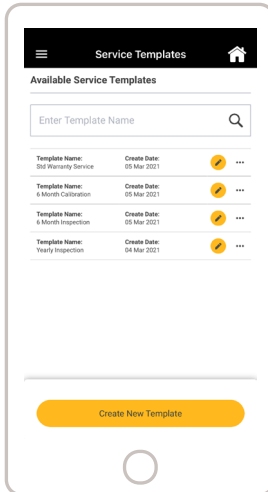7. The asset will be added to the My Assets view.

8. Receive an email confirmation after completing asset registration.
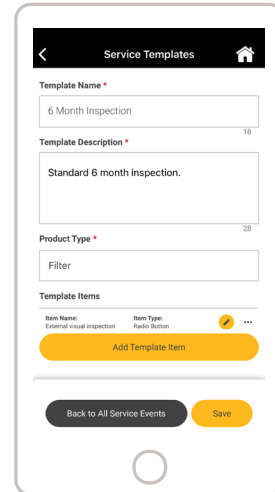
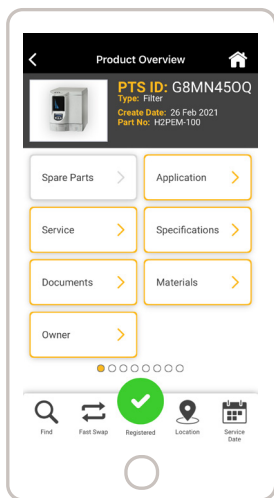# Create Service Template (Mobile)

1. Manage your Service Templates in the Settings menu.

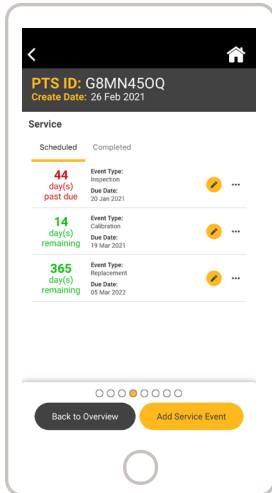2. Create and edit your list of Service Templates.

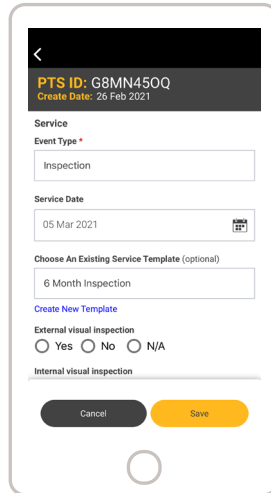3. Add a template name, description product type and a list of questions.

4. Open the Service icon to manage service events for an asset.
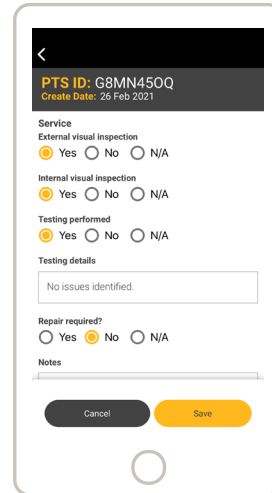
Schedule Service (Mobile)

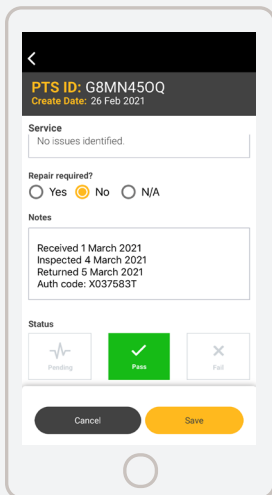1. Add a new event or view your scheduled and completed events.

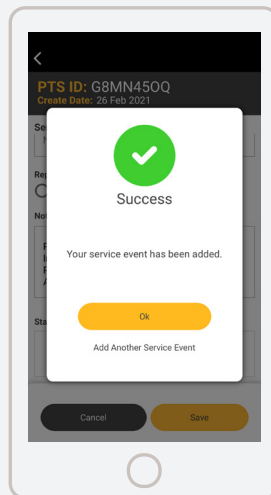2. Choose an event type, service date and service template.

3. Save for later completion or continue through the question prompts.
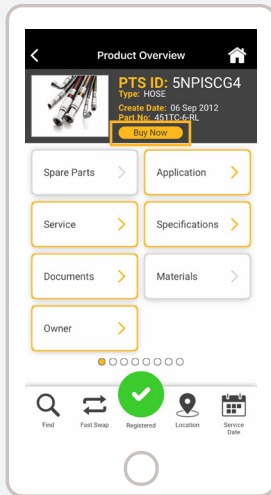
Perform Service (Mobile)

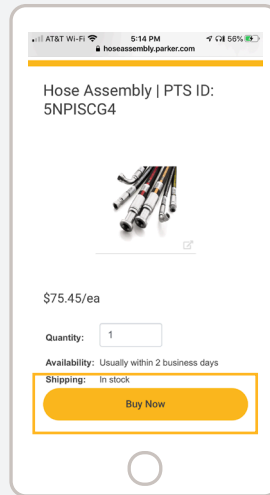1. Update the status to Pass or Fail to complete the event or Pending to keep it open.

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.

2. Enter quantity, shipping information, and payment method.
3. The product(s) will be shipped directly to you.

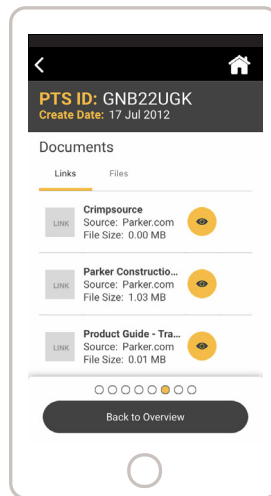# Product Documents & Links

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 section
- You may also add new attachments or URL's to the record
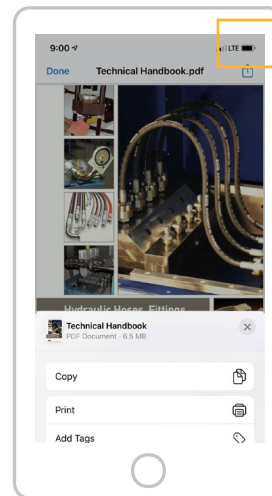
PTS MOBILE APP

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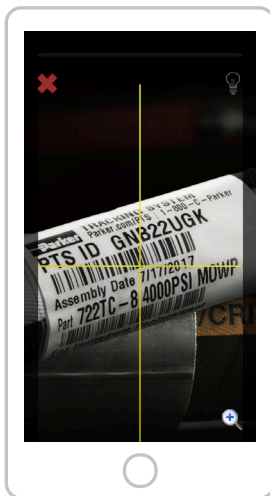
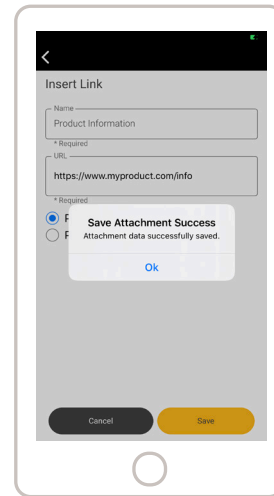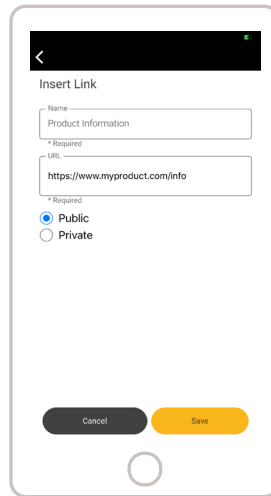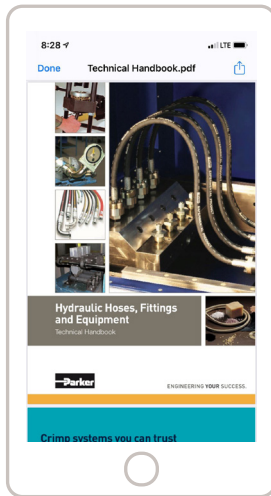Login, choose "Scan PTS", scan or type a PTS ID.

Open Links and Files in the Documents section.

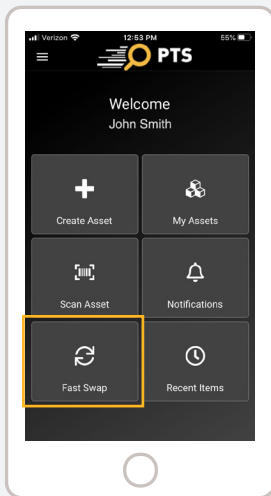Select the download icon to save locally or share.
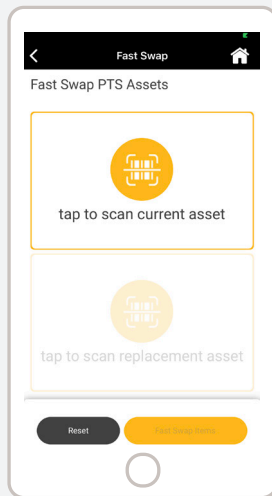
Product Documents & Links (Continued)

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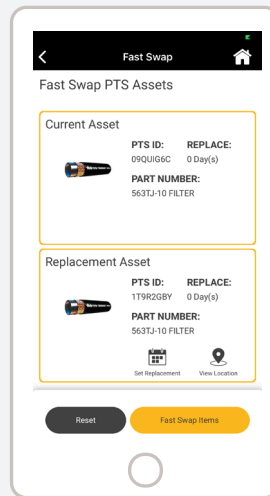
Fast Swap (Mobile)

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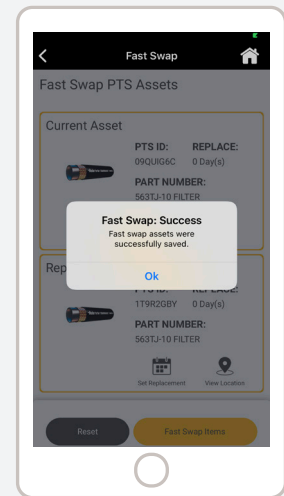

1. Select "Fast Swap."

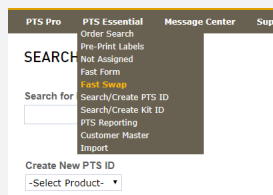2. Scan the current PTS ID being replaced.
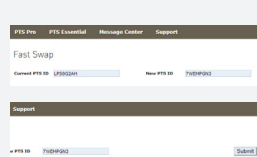
3. Scan the new PTS ID.

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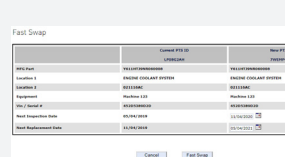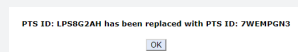
Fast Swap (Web)

1. Select "Fast Swap" from the PTS Essentials dropdown menu.
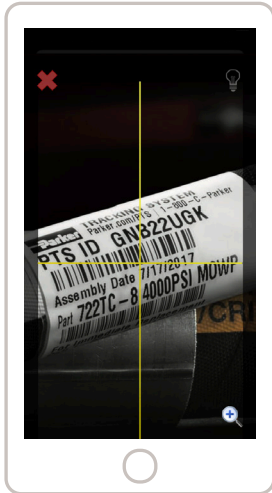
2. Enter the current and new PTS IDs.

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

4. Confirm "Fast Swap."

Edit Asset Information (Mobile)

1. Scan a PTS ID.
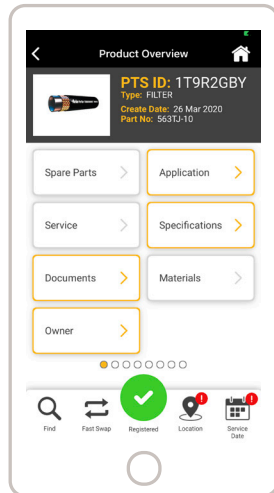
2. Open a section highlighted in gold.
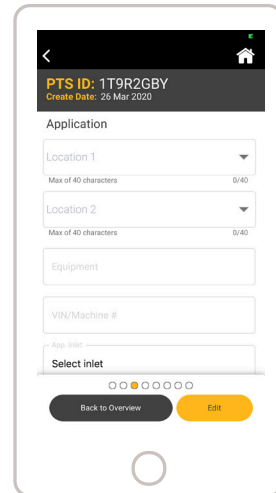
3. If section allows editing, choose the Edit button.

4. Add or update information in the fields listed.

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, equipment or VIN/Machine#.

Set service or replacement dates.

Add attachments to the record.

Notifications

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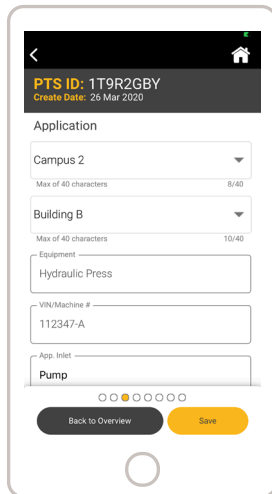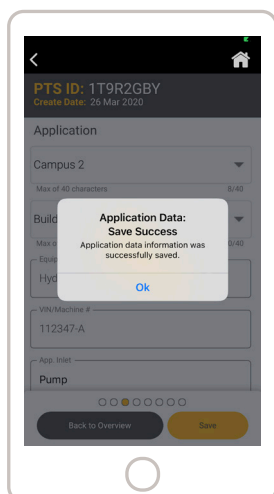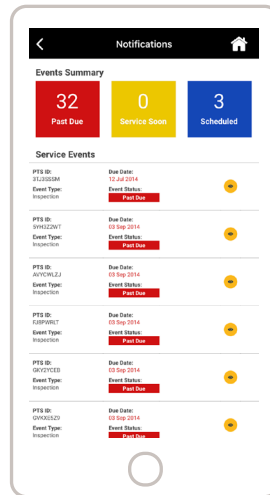

PTS Web Notification Email

PTS Mobile Notification Screen
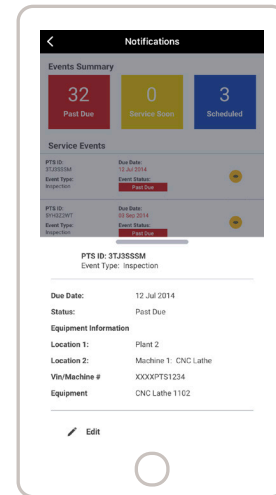
PTS Mobile Notification Detail

Service & History

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

- Create Custom Templates
- Set Schedule Reminders
- Perform and Capture Events
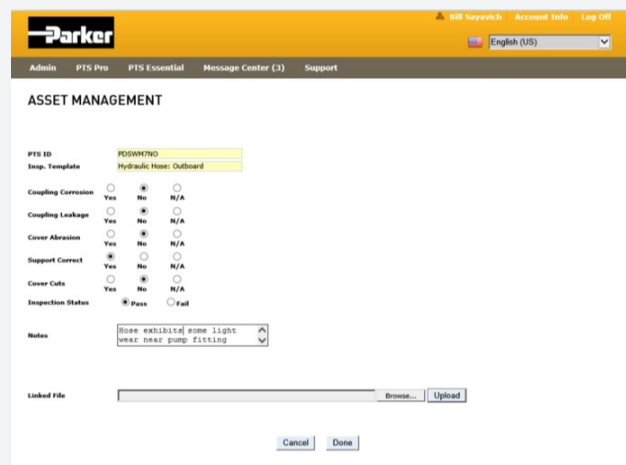
Example: PTS Asset Inspection Template Web
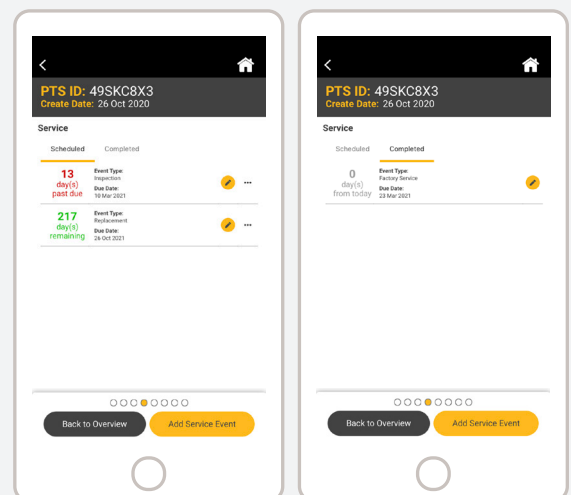
Choose Service icon to display scheduled and completed service events

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.
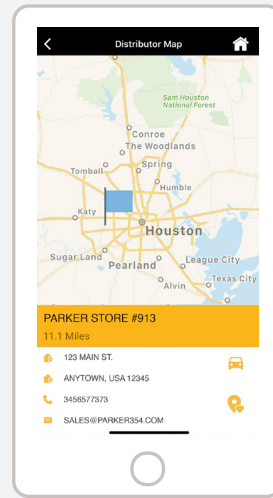
3. One location is selected in map view.

Languages

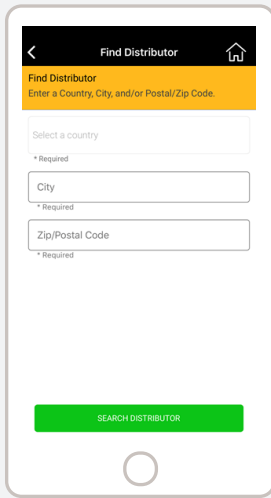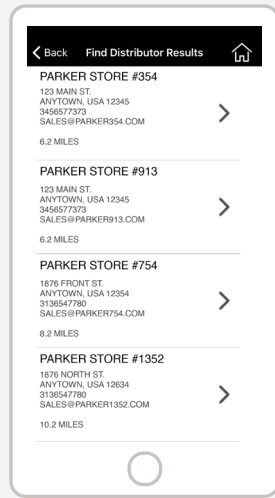The Parker Tracking System web application currently supports 12 languages, including English (US), Chinese, Czech, English (UK), French, German, Italian, Korean, Portuguese, Spanish, Japanese and Russian. We now offer this same support to our mobile users with extended language preferences to support 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.

French

German

Italian

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.

PTS Support Center with Keyword Search

PTS Support Ticket Form

Parker.com/PTS

To open a request or question with our global support team, please send an email to
support@parkertracking.atlassian.net
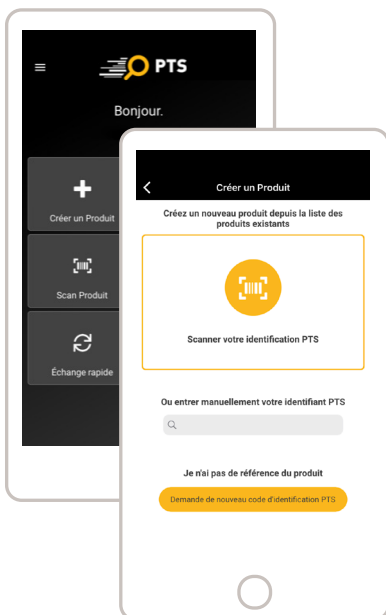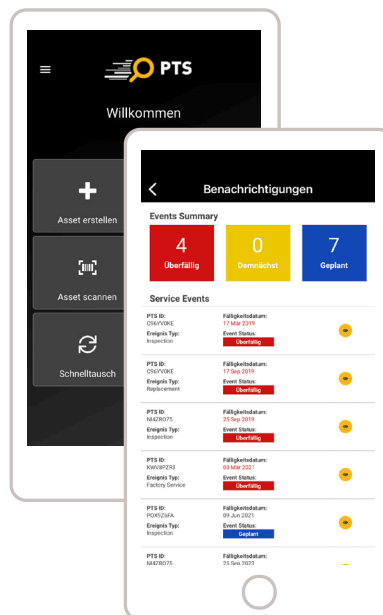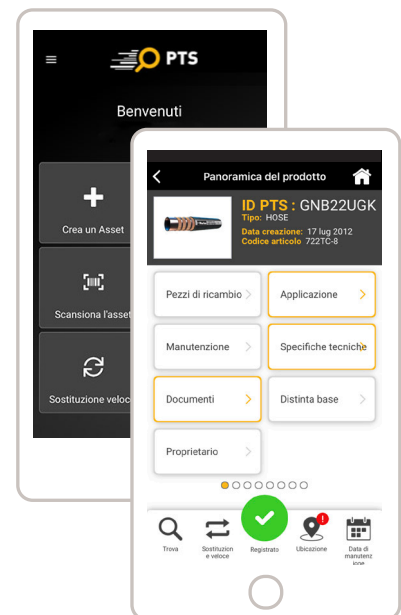
Parker Hannifin

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.

Parker Hannifin Corporation
Global Headquarters
Cleveland, OH 44124
phone 216 896 3000
fax   216 896 3129

Parker Hannifin Corporation
European Headquarters
Etoy, Switzerland
phone (41) 21 821 8500
fax   (41) 21 821 8580

Parker Hannifin Corporation
Asia Pacific Headquarters
Kowloon, Hong Kong
phone (852) 2428 8008
fax   (852) 2423 8253

For information, call toll-free
In North America
1-800-C-PARKER
(1-800-272-7537)
www.parker.com/pts

In EMEA
00800 27 27 5374

ENGINEERING YOUR SUCCESS.