



# Parker Tracking System

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PTS Pro: Asset Integrity Management

Fast. Easy. Accurate.

Release 7.16 | Version 1

**Parker Hannifin Corporation**

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Once an account is enrolled in PTS Pro, the account will gain additional features listed below. The Pro module is a subscription based function of PTS and is only available to users that are enrolled; for additional information regarding Pro subscription please contact your PTS representative.

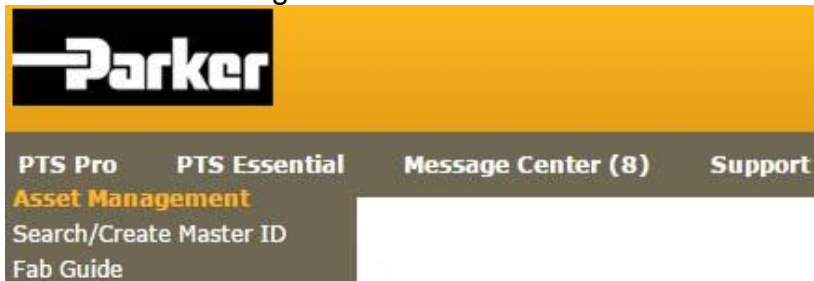
- Custom Inspections
- Service Notifications
- Service Event Management
- Asset Transfer
- Replacement Planning
- DataBook
- Batch Maintenance
- Master Tag
- Custom Fabrication Guides




## Option 2: Asset Management

### PTS Pro | Asset Management

1. From the PTS navigation toolbar menu *select* PTS Pro **Asset Management**.



2. If the PTS ID is known, from within the 'Search Parameters' *enter* the PTS ID into the PTS ID text box and *select* **Search**.
3. If users require the ability to search on other filtering selections include the criteria in the fields provided and *select* **Search**.

 Users may search for all records created by leaving **all** 'Search Parameters' blank and *selecting* **Search**

## 1. Search Parameters

### Selection

- Inspections
- Replacements
- Inspections & Replacements
- Create


### Date Range

- Date range of the selection

### Replacement Reason

- *Select* the reason for a replacement from the list of available options

### Inspection Template

- *Select* from the list of available [Inspection Templates](#)  
 must be scheduled for inspection with the selected inspection template

### Inspection Status


- Pass
- Fail
- All (*default*)
- N/A

## Product Type


- All (*default*)
- Hose
- Other

## Filter Attributes

### Location 1

- Location of the asset  
 this text is override-able in [Account Info](#)

### Location 2

- Location of the asset  
 this text is override-able in [Account Info](#)

### Customer #

- Populated from the 'Customer Info' tab of the asset record details

### Ship #

- Populated from the 'Customer Info' tab of the asset record details

### Mfgr Part

- Populated from the 'Bill Of Materials' tab of the asset record details

**Customer Part**

- Populated from the 'Bill Of Materials' tab of the asset record details

**Base Part**

- Populated from the 'Bill Of Materials' tab of the asset record details

**PO Number**

- Populated from the 'Customer Info' tab of the asset record details

**Criticality**

- Populated from the 'Application Data' tab of the asset record details

**Equipment**

- Populated from the 'Application Data' tab of the asset record details

**Vin/Serial Number**

- Populated from the 'Application Data' tab of the asset record details

**QC Code**

- Populated from the 'Bill Of Materials' tab of the asset record details



### **Order Number**

- Populated from the 'Customer Info' tab of the asset record details

### **Release**

- Populated from <.html> integration with business unit system

### **PTS ID**

- 8-digit Unique Identification Code (UIC) of the record

## 2. Functions & Buttons

### Clear All Fields

- Clears all of the Search Parameters.

### Search

- Executes "Search" function based on the selection parameters specified & returns selected PTS records as a list.

### Select All

- Places a check-mark to the left of the selected records. Those selected are processed through the following functions; **Inspect, Maintain & Replace.**

### Maintain

- Enables access to maintain an individual PTS record or mass-maintenance to a group of records.

### Export

- Exports all of the selected records into an excel spreadsheet for further reporting and analysis.

## Inspect

- Processes the selected PTS tag(s) through the inspection process.

## Service Event

- Perform a service event using Pass, Fail, N/A selections and prepopulated event types.

## Reprint

- Reprints PTS labels for all selected entries.

## DataBook

- Generates a customized .pdf book containing asset specific details of any records selected including; certifications, attachments, asset level details, inspection and replacement history.

 Customize the Title and Cover Image


## Assign Owner

- Enables an account to assign an end owner and transfers all private and non-private application data to the retrieving Account.

 The receiving account must also be enrolled in PTS Pro

## Master Tag

- Group multiple records "children" to a single PTS ID "parent."

 A Master ID is denoted with an asterisk

## Replace

- Replaces the current record and creates a new record with new PTS ID

 All of the previous records data will carry forward



- Expands and collapses the search parameters.




- Displays the history of completed Inspections.



- Access the PTS ID details (Order Info, BOM, Application Data, etc.)




- Delete PTS ID from Asset Management

 This does not delete the PTS ID from the system

### 3. Displaying a Selection of Managed Assets

To locate a particular PTS ID or group of PTS IDs, specify the search parameters and *click Search*. The list of selected PTS IDs will be displayed in the grid below.

#### ASSET MANAGEMENT

 **Search Parameters**

---

**Selection** Inspections

**Date Range** From   To  

Scheduled
  Unscheduled
  Completed
  All

**Replacement Reason**  

**Inspection Template** Any

**Inspection Status**  Pass  Fail  All

**Product Type** \*All

**FILTER ATTRIBUTES**

**Location 1** \*All

**Location 2** \*All

**Customer #** \*All

**Ship #** \*All

**Mfgr Part** \*All

**Customer Part** \*All

**Base Part** \*All

**PO Number** \*All

**Criticality** \*All

**Equipment** \*All

**Vin/Serial Number** \*All

**QC Code** \*All

**Order Number**   **Release**  

**PTS ID**

Clear All Fields

Search





---

Select All
Maintain
Export
Inspect
Service Event
Reprint
DataBook
Assign Owner
Master Tag
Replace

**Total Assets: 2422**

\* Asterisk indicates the ID is part of a Master Tag. Export to view details.

1 2 3 4 5 6 7 8 9 10 ...



PTS ID	Location 1	Crit.	Equip.	Product:Modifier	Next Insp.	Replace			
	Location 2		Vin/Serial	Assembly					
<input type="checkbox"/> 30E135UM*	722803			HOSE					 
	NU FLOW MIDWEST		EB000052						
<input type="checkbox"/> R5DO16TV*	722803	Med	TEST 3/1/16	HOSE	03/01/2017	02/10/2021			 
	NU FLOW MIDWEST		EB000052	42153					

### 3.1 Adding Managed Assets as a Non-Originator

All PTS tags generated are automatically managed assets of the originators account. In order to manage an asset that was created by another account, type in or scan the PTS ID of the desired asset on the Asset Management page and click

**Search.** A prompt will follow that will allow maintenance to the application data and a confirmation to add it to your managed assets by *selecting Add to Assets.*

#### ASSET MANAGEMENT

Location 1	<input type="text" value="Cleveland Plant"/>	
Location 2	<input type="text" value="HPD Product Drawer"/>	
Equipment	<input type="text" value="Equipments"/>	
Vin/Serial Number	<input type="text" value="Vin Number"/>	
Criticality	<input type="text" value="Low"/>	
Inspect Cycle	<input type="text" value="2/25/2018"/> <input type="text" value="3"/> <input type="text" value="Years"/>	From <input type="text" value="Create Date"/> <input type="text" value="2/25/2015"/>
Inspection Template	<input type="text"/>	
Replacement Cycle	<input type="text" value="2/25/2025"/> <input type="text" value="10"/> <input type="text" value="Years"/>	From <input type="text" value="Create Date"/> <input type="text" value="2/25/2015"/>

**Private:** If the PTS ID is marked "Private" by the originator, the application data will initially be blank (not copied over). However, the application data can be set according to your specifications. This will not affect the originators information and the application data specified will be private to your account/group.

### 3.2 Maintain (Individual & Multiple)

The Asset Management module includes mass-maintenance functionality. This enables the user to update individual or multi-selected assets by placing checks in front of the selected PTS records, and applying an update to any specific application data entry(s). This is especially beneficial for applying common values to a group of assets, avoiding the need to update individual records one-at-a-time with the same values.

#### ASSET MANAGEMENT

Search Parameters

Select All Maintain Export Inspect Service Event Reprint DataBook Assign Owner Master Tag Replace

Total Assets: 2429

\* Asterisk indicates the ID is part of a Master Tag. Export to view details.

1 2 3 4 5 6 7 8 9 10 ...

PTS ID	Location 1	Crit.	Equip.	Product:Modifier	Next Insp.	Replace				
	Location 2		Vin/Serial	Assembly						
<input checked="" type="checkbox"/> 30E135UM*	722803			HOSE						
	NU FLOW MIDWEST		EB000052							
<input checked="" type="checkbox"/> R5D016TV*	722803	Med	TEST 3/1/16	HOSE	03/01/2017	02/10/2021				
	NU FLOW MIDWEST		EB000052	42153						
<input checked="" type="checkbox"/> 2G4VI3X6*	A.RESEVOIR		SCHILLING ROV	HOSE						
	AUX PUMP		UHD75	101-6605						

Using the drop down arrows *select* from information previously used for each line item. To manually edit text *select* the **edit text icon** and where applicable users may add free form text in the area denoted <...Description>. When selections have been made select **Update** to save all changes.

## 4. Export

To export Asset Management data, narrow the list to the desired asset by using the "Selection Parameters" at the top of the page and **click Export**. The data selected will be exported into a Microsoft excel format containing two tabs; **Asset Data and BOM**.

### 4.1 Asset Data

The 'Asset Data' tab contains 65 columns of data for user reference and management.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1														
2	PTS ID	Create Date	Master Tag	Customer Number	Customer Name	Order Number	PO #	Account	Managing PTS	Scheduled Insp. Date	Last Insp. Date	Insp. Count	Scheduled Repl. Date	Replacement Date
3	2G4V13X6	12/20/2015	YB2IRF5X					WICKLUFFE	KEG4383		12/22/2015	1		
4	3OE135UM	7/17/2015	TFVDTGYL	asdf	asdf			WICKLUFFE	KEG4383			0		
5	8SPPT1K4	3/8/2016	YB2IRF5X					WICKLUFFE	achiancone			0		
6	RSDO16TV	2/10/2016	WUJU4O2P					WICKLUFFE	snively_wickliffe	3/1/2017	3/1/2016	1	2/10/2021	
7														
8														
9														
10														
11														
12														
13														
14														

### 4.2 BOM & Budgetary Export

The 'BOM and Budgetary Export' tab is specifically designed for organizations planning service events that require inventory items. This file breaks down each component & quantity by like unit of measurements to help plan for a successful maintenance event.

Bill Of Material Summary				
Component	Total Qty	Description	Total Length	Uom
487-10	4	Hose	100	in
10143-8-6	2	Fitting		PC
13943-8-6	2	Fitting		PC
302-6	2	Hose	39.5	in
EA98 63 FL	1	Other		PC
0130-6-6C	4	Fitting		PC
55AG-12	2	Guard		PC



## 5. Inspect

An inspection can be processed with or without an assigned inspection template. If the asset has an inspection template specified, the inspection template items will be presented for responses. Otherwise the inspection will be a simple pass/fail selection; a general notes field and the ability to upload attachments or images.

Users can inspect a single asset or multiple assets at a time by checking single or multiple check boxes in the list before *clicking Inspect*.

### ASSET MANAGEMENT

Search Parameters

Total Assets: 2429

\* Asterisk indicates the ID is part of a Master Tag. Export to view details.

1 2 3 4 5 6 7 8 9 10 ...

PTS ID	Location 1	Crit.	Equip.	Product:Modifier	Next Insp.	Replace				
	Location 2		Vin/Serial	Assembly						
<input checked="" type="checkbox"/> 30E135UM*	722803			HOSE						
	NU FLOW MIDWEST		EB000052							
<input checked="" type="checkbox"/> R5D016TV*	722803	Med	TEST 3/1/16	HOSE	03/01/2017	02/10/2021				
	NU FLOW MIDWEST		EB000052	42153						
<input checked="" type="checkbox"/> 2G4VI3X6*	A.RESEVOIR		SCHILLING ROV	HOSE						
	AUX PUMP		UHD75	101-6605						

## 5.1 Inspection without an Inspection Template

If an asset does not have an inspection template, the inspection process will result in a simple Pass/Fail, notes entry and attachment selection. If *Fail* is specified, additional entries will appear for a standard failure reason and a free form entry if <Other> is specified.

### ASSET MANAGEMENT

PTS ID

Inspection Status  Pass  Fail

Notes

Failure Reason:

Other Failure Reason:

Linked File

## 5.2 Inspection with Inspection Template

An inspection template is a customized set of inspection items, created by the account administrator and assigned to assets along with the inspection cycle. The inspection template questions are listed first, followed by the standard Pass/Fail, notes entry, failure reason options and attachment selection.

Each inspection template is a unique set of inspection items. Each can be defaulted by criticality, overridden or assigned when printing or assigned on the Application Data tab for the selected PTS ID.

### ASSET MANAGEMENT

PTS ID	<input type="text" value="3JT2VSZ7"/>		
Insp. Template	<input type="text" value="Standard Insp Template"/>		
Application Correct	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Coupling Corrosion	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> N/A
Coupling Leakage	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> N/A
Cover Abrasion	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Cover Blistered	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> N/A
Cover Kinks	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Routing Correct	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> N/A
Support Correct	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> N/A
Hose Twisting	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> N/A
Inspection Status	<input checked="" type="radio"/> Pass <input type="radio"/> Fail		
Notes	<input type="text" value="Example of inspection with template"/>		
Linked File	<input type="button" value="Choose File"/> <input type="text" value="Desert.jpg"/>		<input type="button" value="Upload"/>

### 5.3 Failed Inspections

When specifying *Fail* as the inspection status of an asset, a failure reason and a free form failure reason, (if <other> was specified), are displayed. These are not required but are available for input.

#### ASSET MANAGEMENT

PTS ID	<input type="text" value="30E135UM"/>		
Insp. Template	<input type="text"/>		
Application Correct	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Coupling Corrosion	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> N/A
Coupling Leakage	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Cover Abrasion	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> N/A
Cover Bend Radius	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Cover Blistered	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> N/A
Cover Flattening	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Cover Indentation	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> N/A
Cover Kinks	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Routing Correct	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> N/A
Cover Cracks	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Hose Twisting	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> N/A
Inspection Status	<input type="radio"/> Pass <input checked="" type="radio"/> Fail		
Notes	<input type="text" value="Failed"/>		
Failure Reason:	<input type="text" value="&lt;none&gt;"/>		
Other Failure Reason:	<input type="text"/>		
Linked File	<input type="button" value="Choose File"/> No file chosen		<input type="button" value="Upload"/>
<input type="button" value="Cancel"/> <input type="button" value="Done"/>			

## 5.4 Inspection History

### ASSET MANAGEMENT

Search Parameters

**Total Assets: 2423**

\* Asterisk indicates the ID is part of a Master Tag. Export to view details.

1 2 3 4 5 6 7 8 9 10 ...

PTS ID	Location 1	Crit.	Equip.	Product:Modifier	Next Insp.	Replace				
	Location 2		Vin/Serial	Assembly						
<input type="checkbox"/> 30E135UM*	722803			HOSE						
	NU FLOW MIDWEST		EB000052							
<input checked="" type="checkbox"/> R5DO16TV*	722803	Med	TEST 3/1/16	HOSE	03/01/2017	02/10/2021				
	NU FLOW MIDWEST		EB000052	42153						

To view the inspection history of a PTS item click the history icon at the right of the table entry.

### ASSET MANAGEMENT

**PTS ID:R5DO16TV**

1						
Company	Name	Date	Event Type	Template	Status	
Parker Hannifin - Hose Products Division	Amanda Chiancone	03/01/2016 9:26AM	Inspection	Test for 3/1/16	PASS	
1						

The inspection history will be ordered by inspection date and time. To view the details of an inspection click at the right of the table entry.

## ASSET MANAGEMENT

PTS ID	R5D016TV
Insp. Template	Test for 3/1/16
Application Correct	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
11/18/15	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/A
Template Test	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Inspection Status	<input checked="" type="radio"/> Pass <input type="radio"/> Fail
Notes	yES

Linked File  No file chosen

The inspection details are not maintainable but are available as view only.

## 6. Service Event

Users that are providing maintenance or services have the ability to *select Service Event* to individual or multiple IDs.

**Total Assets: 2423**  
 \* Asterisk indicates the ID is part of a Master Tag. Export to view details.

1 2 3 4 5 6 7 8 9 10 ...

PTS ID	Location 1	Crit.	Equip.	Product:Modifier	Next Insp.	Replace			
	Location 2		Vin/Serial	Assembly					
<input checked="" type="checkbox"/> 30E135UM*	722803 NU FLOW MIDWEST		EB000052	HOSE					
<input checked="" type="checkbox"/> R5D016TV*	722803 NU FLOW MIDWEST	Med	TEST 3/1/16 EB000052	HOSE 42153	03/01/2017	02/10/2021			
<input checked="" type="checkbox"/> 2G4VI3X6*	A.RESEVOIR AUX PUMP		SCHILLING ROV UHD75	HOSE 101-6605	Failed				
<input checked="" type="checkbox"/> 6RSUPMHO*	A.RESEVOIR AUX PUMP		SCHILLING ROV UHD75	HOSE 101-6605					

Users can *select* an event type from a prepopulated list of the most common service events using the drop down menu. If *Other* is selected a free form text box will be available for editing. The service status is a simple Pass/Fail selection; a general notes field and the ability to upload attachments or images.

## 7. Reprint

To reprint PTS labels, narrow the list to the desired assets by using the Selection Parameters at the top of the page, check the desired entries and click the **Reprint** button.

### ASSET MANAGEMENT

Search Parameters

Total Assets: 2429

\* Asterisk indicates the ID is part of a Master Tag. Export to view details.

1 2 3 4 5 6 7 8 9 10 ...

PTS ID	Location 1	Crit.	Equip.	Product:Modifier	Next Insp.	Replace				
	Location 2		Vin/Serial	Assembly						
<input checked="" type="checkbox"/> 30E135UM*	722803			HOSE						
	NU FLOW MIDWEST		EB000052							
<input checked="" type="checkbox"/> R5D016TV*	722803	Med	TEST 3/1/16	HOSE	03/01/2017	02/10/2021				
	NU FLOW MIDWEST		EB000052	42153						
<input checked="" type="checkbox"/> 2G4VI3X6*	A.RESEVOIR		SCHILLING ROV	HOSE						
	AUX PUMP		UHD75	101-6605						



## 8. DataBook

Users can generate a customized .pdf booklet containing asset specific details of single or multi-selected records using the Selection Parameters at the top of the page. DataBook can be customized with a cover page image, title and overview information.

### ASSET MANAGEMENT

Search Parameters

Select All Maintain Export Inspect Service Event Reprint DataBook Assign Owner Master Tag Replace

Total Assets: 2423  
\* Asterisk indicates the ID is part of a Master Tag. Export to view details.

1 2 3 4 5 6 7 8 9 10 ...

PTS ID	Location 1	Crit.	Equip.	Product:Modifier	Next Insp.	Replace			
	Location 2		Vin/Serial	Assembly					
<input checked="" type="checkbox"/> 30E135UM*	722803			HOSE					
	NU FLOW MIDWEST		EB000052						
<input checked="" type="checkbox"/> R5D016TV*	722803	Med	TEST 3/1/16	HOSE	03/01/2017	02/10/2021			
	NU FLOW MIDWEST		EB000052	42153					
<input checked="" type="checkbox"/> 2G4VI3X6*	A.RESEVOIR		SCHILLING ROV	HOSE					
	AUX PUMP		UHD75	101-6605					

For users that are interested in generating this resource, PTS offers a convenient option to email the report to specified email addresses after processing by *selecting* the **Email Report**

### ASSET MANAGEMENT

**Databook Title**  
Enter Your Title

**Cover Image**  
Choose File No file chosen Upload Clear

Email Report (Email Report is recommended for Large Asset Databooks)

**Databook Information**  
Enter any information to appear on the first page of the DataBook

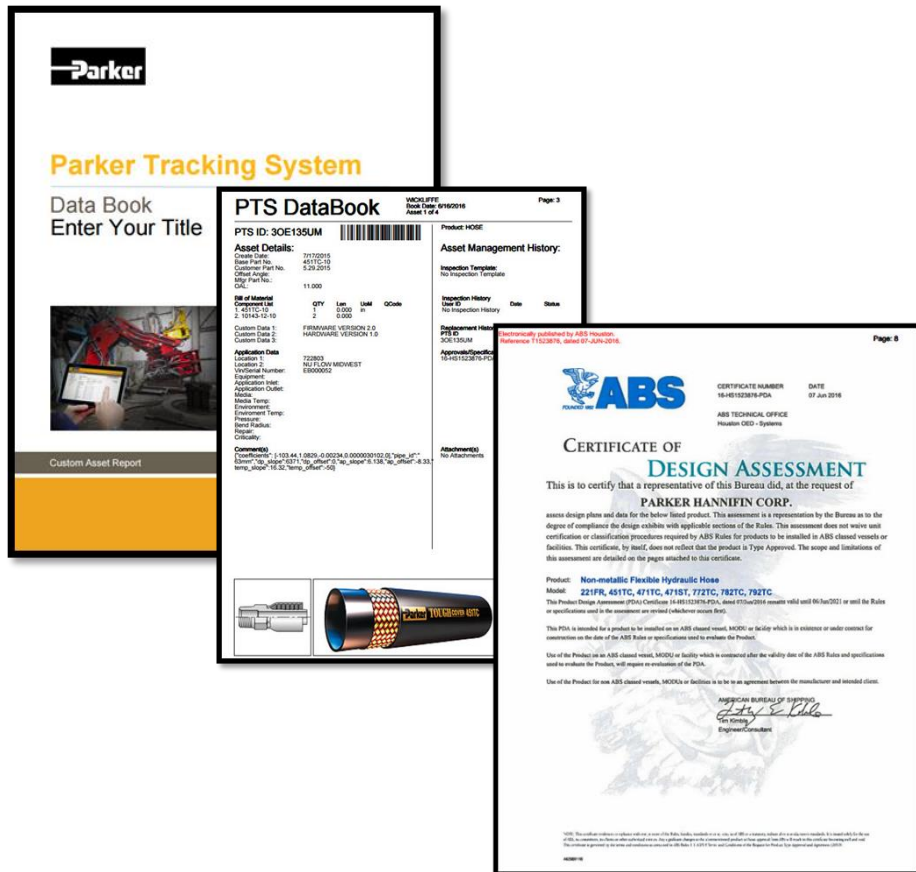
1935/2000

Cancel Export

checkbox.

## 8.1 DataBook Contents

- Asset Details
- Comments
- Inspection History (by User)
- Specifications
- Bill of Material
- Asset Management History
- Replacement History
- Attachments
- Application Data
- Inspection Templates
- Approvals
- Product Images



## 9. Assign Owner

The assign owner function will add the selected assets to the managed assets list of another account, including any private data. The selected account must be enrolled in PTS Pro and available for selection the drop down list.

### ASSET MANAGEMENT

Search Parameters

Total Assets: 2423

\* Asterisk indicates the ID is part of a Master Tag. Export to view details.

1 2 3 4 5 6 7 8 9 10 ...

PTS ID	Location 1	Crit.	Equip.	Product:Modifier	Next Insp.	Replace			
	Location 2		Vin/Serial	Assembly					
<input type="checkbox"/> 30E135UM*	722803 NU FLOW MIDWEST		EB000052	HOSE					
<input type="checkbox"/> R5DO16TV*	722803 NU FLOW MIDWEST	Med	TEST 3/1/16 EB000052	HOSE 42153	03/01/2017	02/10/2021			
<input type="checkbox"/> 2G4V13X6*	A.RESEVOIR AUX PUMP		SCHILLING ROV UHD75	HOSE 101-6605					

To select the account you wish to send the PTS IDs to, *click* the transfer icon and *select Proceed* to continue through the assignment steps.

### ASSET MANAGEMENT

Are you sure you would like to 4 PTS ID to PTS Tech Tour?

Search:

1

Assign	Company	Account Code	Location	Location	Address 1	Address 2	City	State
	PTS TEST CUSTOMER	PTS TEST		6035 Parkland Blvd		Cleveland	OH	44124
	PTS Tech Tour	TechTour						
	PTS Pro Cert Account	PROCERT		6035 Parkland Boulevard		Cleveland	OH	44124

1

## 10. Master Tag

Master Tag is a useful tool for assigning multiple PTS IDs to one tag in a parent-child relationship method. A good example would be a piece of equipment with many assets; a user might need to scan one tag to look at a complete list of assets at a glance. Master tag items are denoted with an asterisk \*

### ASSET MANAGEMENT

Search Parameters


Select All Maintain Export Inspect Service Event Reprint DataBook Assign Owner Master Tag Replace

Total Assets: 2423

\* Asterisk indicates the ID is part of a Master Tag. Export to view details.

1 2 3 4 5 6 7 8 9 10 ...

PTS ID	Location 1	Crit.	Equip.	Product:Modifier	Next Insp.	Replace			
	Location 2		Vin/Serial	Assembly					
<input checked="" type="checkbox"/> 30E135UM*	722803		EB000052	HOSE					
	NU FLOW MIDWEST								
<input checked="" type="checkbox"/> R5D016TV*	722803	Med	TEST 3/1/16	HOSE	03/01/2017	02/10/2021			
	NU FLOW MIDWEST		EB000052	42153					
<input checked="" type="checkbox"/> 2G4VI3X6*	A.RESEVOIR		SCHILLING ROV	HOSE					
	AUX PUMP		UHD75	101-6605					
<input checked="" type="checkbox"/> 6RSUPMHO*	A.RESEVOIR		SCHILLING ROV	HOSE					
	AUX PUMP		UHD75	101-6605					



## Master Tag

**MASTER TAG**

Custom Data

Label Printer

Cancel
Confirm

# 11. Replace

To replace single or multi-selected PTS IDs with a new record containing identical details *select Replace*. Users may edit the BOM and additional information on the replacement record after creating the new asset.

## ASSET MANAGEMENT

Search Parameters

Select All Maintain Export Inspect Service Event Reprint DataBook Assign Owner Master Tag **Replace**

Total Assets: 2423  
\* Asterisk indicates the ID is part of a Master Tag. Export to view details.

1 2 3 4 5 6 7 8 9 10 ...

PTS ID	Location 1	Crit.	Equip.	Product:Modifier	Next Insp.	Replace		
	Location 2		Vin/Serial	Assembly				
<input type="checkbox"/> 30E135UM*	722803 NU FLOW MIDWEST		EB000052	HOSE				
<input checked="" type="checkbox"/> R5DO16TV*	722803 NU FLOW MIDWEST	Med	TEST 3/1/16 EB000052	HOSE 42153	03/01/2017	02/10/2021		

To retain the current Customer details *select Same Customer Info as PTSID* to update the Customer Info for newly created records.

## ASSET MANAGEMENT

Order Info

Same Customer Info as PTSID

Order Number

Customer PO#

Customer #

Name

Address

City

State/Prov/Reg

Zip/Postal Code

Country

Ship To #

Name

Address

City

State/Prov/Reg

Zip/Postal Code

Country

Contact Name

Email


Phone

Fax

Mobile

Same as Billing information.

Proceed with selections required to print the newly created IDs. Users may choose to either carry or retain information based on whether the selection box is filled or blank. Once complete select **Confirm** to *Reprint* label(s).



## Replacing 1 PTS ID

Print Duplicates for  OD  Length

Create Excel List of Replacements

**Replacement Information**

Reason

Other Reason

Replacement Notes

Copy all attachments

**Label**

Custom Data 1

Custom Data 2

Custom Data 3

Override all Browse...

**Hose Integrity Management**

Criticality

Inspection Cycle    From  Create Date  6/16/2016

Inspection Template   Set Inspection at Print

Replacement Cycle    From  Create Date  6/16/2016

Override Asset Mgmt.  Set Replacement at Print

Printer 1 (4")  NoPTSPrint

Printer 2 (8")  NoPTSPrint

Label Format  PartLabel.lwl

Label Format  PartLabel.lwl

Cancel
Confirm

## 11.1 Replacement Details


To view the replacement details for a PTS record *select* the **Replacement History** tab when viewing record details. A full history starting with the first record and ending with the most recent item is listed with date/time stamp of creation and replacement details. Replacement reason will also be visible if populated.

### SEARCH/CREATE PTS ID

**PTS ID**

View in Asset Mgmt Done Update Replace Duplicate Reprint Cancel

Originator: Parker Hannifin - Hose Products Division ⓘ  
 Product Type: Hose Assembly Asset Type: Parent Item  
 Asset Status: Exists  
 Master Tag(s): WUJU402P  
 Private  Override Edits



Customer Info Originators Order Info Bill of Materials Alt Bill of Material Application Data **Replacement Details**

Reason

Other Reason

Replacement Notes

Linked File  No file chosen

PTS ID	Creation Date	Replacement Date	Replacement Reason
CE5HNBFO	7/17/2015 4:47:40 PM	2/10/2016 12:02:51 PM	COVER ABRASION
2WCNHNXL	2/10/2016 12:02:51 PM	2/10/2016 1:34:49 PM	
R5DO16TV	2/10/2016 1:34:49 PM		

## 12. Accessing PTS Details

To view the PTS details of an asset *click* the view details icon at the right of the table entry.

### ASSET MANAGEMENT

Search Parameters

Select All Maintain Export Inspect Service Event Reprint DataBook Assign Owner Master Tag Replace

Total Assets: 2423

\* Asterisk indicates the ID is part of a Master Tag. Export to view details.

1 2 3 4 5 6 7 8 9 10 ...

PTS ID	Location 1	Crit.	Equip.	Product:Modifier	Next Insp.	Replace		
	Location 2		Vin/Serial	Assembly				
<input type="checkbox"/> 30E135UM*	722803 NU FLOW MIDWEST		EB000052	HOSE				

### SEARCH/CREATE PTS ID

PTS ID

View in Asset Mgmt Done Update Replace Duplicate Reprint Cancel

Originator: Parker Hannifin - Hose Products Division  
 Product Type: Hose Assembly  
 Asset Status: Exists  
 Asset Type: Parent Item  
 Private  Override Edits



Customer Info Originators Order Info **Bill of Materials** Alt Bill of Material Application Data Replacement Details

Mfgr Part: 471TC06JC040404-101  
 Base Part Number: 471TC-4 1/4"-11237-1 25C-5800PSI  
 OAL: 0.000 in  
 Offset Angle: degrees

**Label**

Customer Part: T3355001-09-017  
 Custom Data 1: GREASE PLUMBING  
 Custom Data 2: PELLETT FLUSH  
 Custom Data 3:

Component Part (partial for search)	Quantity	Length	Angle	U/M	QC Code	
471TC-4 Hose	1	101.000		in		✗
10643-4-4 Fitting	1			PC		✗
1JC43-4-4 Fitting	1			PC		✗

Apply

**Comment**  
 Installation/routing instructions



## 13. Deleting Assets


A user can delete an asset from Asset Management by *clicking* the red 'x' at the right of the table entry. This function will only delete the PTS ID from your managed assets, it will not delete the actual PTS record from the PTS system.

ASSET MANAGEMENT												
<input checked="" type="checkbox"/> Search Parameters												
<input type="button" value="Select All"/> <input type="button" value="Maintain"/> <input type="button" value="Export"/> <input type="button" value="Inspect"/> <input type="button" value="Service Event"/> <input type="button" value="Reprint"/> <input type="button" value="DataBook"/> <input type="button" value="Assign Owner"/> <input type="button" value="Master Tag"/> <input type="button" value="Replace"/>												
<b>Total Assets: 2423</b>												
* Asterisk indicates the ID is part of a Master Tag. Export to view details.												
1 2 3 4 5 6 7 8 9 10 ...												
PTS ID	Location 1		Crit.	Equip.		Product:Modifier		Next Insp.	Replace			
	Location 2	Vin/Serial		Assembly								
<input type="checkbox"/> 30E135UM*	722803					HOSE						
	NU FLOW MIDWEST			EB000052								
<input checked="" type="checkbox"/> R5D016TV*	722803		Med	TEST 3/1/16		HOSE	03/01/2017	02/10/2021				
	NU FLOW MIDWEST			EB000052		42153						

## 14. Re-Adding a Deleted Asset

If a user deletes an asset from Asset Management, you can re-add the asset by typing or scanning the deleted PTS ID and click **Search**.

### ASSET MANAGEMENT

 **Search Parameters**

---

**Selection** Inspections ▼

**Date Range** From  To

Scheduled
  **Unscheduled**
 Completed
  **All**

**Replacement Reason** ▼

**Inspection Template** Any ▼

**Inspection Status** 
 Pass
  Fail
  **All**

**Product Type** \*All ▼

**FILTER ATTRIBUTES**

**Location 1** \*All ▼

**Location 2** \*All ▼

**Customer #** \*All ▼

**Ship #** \*All ▼

**Mfgr Part** \*All ▼

**Customer Part** \*All ▼

**Base Part** \*All ▼

**PO Number** \*All ▼

**Criticality** \*All ▼

**Equipment** \*All ▼

**Vin/Serial Number** \*All ▼

**QC Code** \*All ▼

**Order Number**

**PTS ID**



**Release**

---

Select All
Maintain
Export
Inspect
Service Event
Reprint
DataBook
Assign Owner
Master Tag
Replace

**Total Assets: 2423**  
\* Asterisk indicates the ID is part of a Master Tag. Export to view details.

1 2 3 4 5 6 7 8 9 10 ...

PTS ID	Location 1	Crit.	Equip.	Product:Modifier	Next Insp.	Replace			
	Location 2		Vin/Serial	Assembly					
<input type="checkbox"/> 30E135UM*	722803			HOSE					 
	NU FLOW MIDWEST		EB000052						