

Parker Tracking System

PTS Pro: Asset Integrity Management

Fast. Easy. Accurate.

Release 7.16 | Version 1 Parker Hannifin Corporation Copyright © 2016 Parker Hannifin Corporation

Table of Contents

Navigating Asset Management
Option 1: Home Screen
Option 2: Asset Management4
1. Search Parameters
Filter Attributes6
2. Functions & Buttons
3. Displaying a Selection of Managed Assets
3.1 Adding Managed Assets as a Non-Originator13
3.2 Maintain (Individual & Multiple)14
4. Export
4.1 Asset Data
4.2 BOM & Budgetary Export15
5. Inspect
5.1 Inspection without an Inspection Template17
5.2 Inspection with Inspection Template18
5.3 Failed Inspections19
5.4 Inspection History
6. Service Event
7. Reprint
8. DataBook
8.1 DataBook Contents
9. Assign Owner
10. Master Tag
11. Replace
11.1 Replacement Details
12. Accessing PTS Details
13. Deleting Assets
14. Re-Adding a Deleted Asset

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

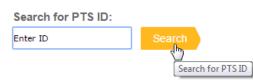
Navigating Asset Management

Navigate to the 'Asset Management' screen using one of the two following options.

Option 1: Home Screen

1. From the PTS home screen *enter* the PTS ID in the 'Search for PTS ID' text box and *select* **Search**.

SEARCH/CREATE PTS ID



- 2. Users will be redirected to the 'Bill of Materials' screen at the Search/Create PTS ID page.
- 3. Select the View in Asset Mgmt. button from the action buttons in the header.

	RF5ZQLOB				∕iew in Asset Mgn	it Done	Update	Replace	Duplicate	Reprint	Cance
riginator: roduct Type: sset Status:	Parker Hanni Hose Assemi Exists	oly As:	oducts Division 🗓 set Type: I Override Edits	Parent Item							TH CLOSE 17
Customer Info	Originators	Order Info	Bill of Materials	Alt Bill of Material	Application Data	Replacem	ent Details]			
Mfgr Part	4717.00	6JC040404-:	261	1							
Base Part Num OAL Offset Angle			1/4"-11237-	-1 2SC-5800PSI							
Label											
Customer Part	T3355	001-09-036									
Custom Data 1	GREAS	E PLUMBING		Default							
Custom Data 2		FLUSH		Browse.							
Custom Data 3	3			Memoriz	e						
Custom Data 3	- 19	6				Aunta	11/34	00	C. d.		-
Component P	- 19	1.000		Quantit	r Length	Angle	U/M		Code		
Component F 471TC-4	- 19	Hose		Quantity 1		Angle	in	•	Code		*
Component F 471TC-4 10643-4-4	- 19	Hose Fitting	2	Quantity 1	r Length	Angle	in PC		Code		×
Component P 471TC-4	- 19	Hose	2	Quantity 1	r Length	Angle	in	• •	Code		
Component F 471TC-4 10643-4-4	- 19	Hose Fitting		Quantity 1	r Length	Angle	in PC		Code		×
Component F 471TC-4 10643-4-4	- 19	Hose Fitting	2 2 2 2 2	Quantity 1	r Length	Angle	in PC	1 7 7 7 7 7	Code		×
Component F 471TC-4 10643-4-4	- 19	Hose Fitting		Quantity 1	r Length	Angle	in PC		Code		×
Component F 471TC-4 10643-4-4	- 19	Hose Fitting	2 2 2 2 2 2	Quantity 1	r Length	Angle	in PC		Code		×
Component P 471TC-4 10643-4-4	- 19	Hose Fitting	2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	Quantity 1	r Length	Angle	in PC		Code		×

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
 imust 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 <u>Account Info</u>

Location 2

Location of the asset
 in this text is override-able in <u>Account Info</u>

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 massmaintenance to a group of records.



• 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.

3

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

Selection	Inspections			•	
Date Range	From	<u> </u>	То	<u> </u>	
	Scheduled	Uns	chedule	d Ocompleted	
Replacement Reason					
Inspection Template	Any		•		
Inspection Status	O Pass	Fail	e 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					

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

	DTC ID	Location 1	C	Equip.	Product:Modifier		Dealers			
	PTS ID	Location 2	Crit.	Vin/Serial	Assembly	Next Insp.	Replace			
	2054251048	722803			HOSE				0	
	30E135UM*	NU FLOW MIDWEST		EB000052	5				10=1	^
5	R5D016TV*	722803	Med	TEST 3/1/16	HOSE	02/01/2017	02/10/2021		8= ==	
1	KSD0161V	NU FLOW MIDWEST	Med	EB000052	42153	03/01/2017 02/10/2021	02/10/2021	0	182	^

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**.

ocation 1	Cleveland Plant			ŧΞ				
Location 2	HPD Product D	rawer	۲	P				
Equipment	Equipments]						
Vin/Serial Number	Vin Number	50						
Criticality	Low T							
Inspect Cycle	2/25/2018	3	Years	۲	From	Create Date	۲	2/25/2015
Inspection Template			•					
Replacement Cycle	2/25/2025	10	Years	۲	From	Create Date	Ŧ	2/25/2015

ASSET MANAGEMENT

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.

S	elect All Main	tain Export Inspe	ct S	ervice Event Reprint	DataBook Assign Owner	Master Tag Repla	ce			
	tal Assets: 24 Berisk indicates the I	429 D is part of a Master Tag. Ex	port to vi		2 3 4 5 6 7 8 9 10					
<u>.</u>		Location 1		Equip.	Product:Modifier					T
	PTS ID	Location 2	Crit.	Vin/Serial	Assembly	Next Insp.	Replace			
~	205125-104	722803			HOSE				011	1
*	30E135UM*	NU FLOW MIDWEST		EB000052					1	
-	R5D016TV*	722803	Med	TEST 3/1/16	HOSE	02/01/2017	02/10/2021	-	0	T
	RSD0161V*	NU FLOW MIDWEST	Med	EB000052	42153	03/01/2017	02/10/2021	G		
-		A.RESEVOIR		SCHILLING ROV	HOSE				0-	Ī
1	2G4VI3X6*	The second s		UHD75	101-6605				0	

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.

В	С	D	E	F	G	н	1	J	K	L	M	N
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
12/20/2015	YB2JRF5X					WICKLIFFE	KEG4383	-	12/22/2015		1	
7/17/2015	TFVDTGYL	asdf	asdf			WICKLIFFE	KEG4383			1. 10	0	
3/8/2016	YB2JRF5X					WICKLIFFE	achiancone			1 1	0	
2/10/2016	WUJU402P					WICKLIFFE	snively_wickliffe	3/1/2017	3/1/2016		1 2/10/2021	
	Create Date 12/20/2015 7/17/2015 3/8/2016	Create Date Master Tag 12/20/2015 YB2JRF5X 7/17/2015 TFVDTGYL 3/8/2016 YB2JRF5X	Create Date Master Tag Customer Number 12/20/2015 YB2JRF5X 7/17/2015 FFVDTGYL 3/8/2016 YB2JRF5X 3df 3df	Create Date Master Tag Customer Number Customer Name 12/20/2015 YB2/RF5X 7/17/2015 FFVDTGYL asdf 3/8/2016 YB2/RF5X asdf asdf	Create Date Master Tag Customer Number Customer Name Order Number 12/20/2015 YB2/RF5X 7/17/2015 7FVDTGYL asdf asdf 3/8/2016 YB2/RF5X 6 6 6 6	Create Date Master Tag Customer Number Customer Name Order Number PO # 12/20/2015 YB2/RF5X 7/17/2015 TFVDTGYL asdf asdf 3/8/2016 YB2/RF5X 6	Create Date Master Tag Customer Number Customer Name Order Number PO # Account 12/20/2015 YB2/RF5X WICKUFFE WICKUFFE WICKUFFE 3/8/2016 YB2/RF5X WICKUFFE WICKUFFE WICKUFFE	Create Date Master Tag Customer Number Order Number PO # Account Managing PTS 12/20/2015 YB2/RF5X WICKLIFFE KEG4383 WICKLIFFE KEG4383 7/17/2015 TFVDTGYL asdf WICKLIFFE KEG4383 3/8/2016 YB2/RF5X WICKLIFFE KEG4383	Create Date Master Tag Customer Number Customer Number PO # Account Managing PTS Scheduled Insp. Date 12/20/2015 YB2/JRF5X VICKLIFFE WICKLIFFE KEG4383 VICKLIFFE KEG4383 VICKLIFFE	Create Date Master Tag Customer Number Customer Name Order Number PO # Account Managing PTS Scheduled Insp. Date Last Insp. Date 12/20/2015 YB2/JRF5X VICKUFFE KEG4383 12/22/2015 7/17/2015 TFV/DTGYL asdf WICKUFFE KEG4383 12/22/2015 3/8/2016 YB2/JRF5X WICKUFFE KEG4383 12/22/2015	Create Date Master Tag Customer Number Customer Number PO # Account Managing PTs Scheduled Insp. Date Last Insp. Date Insp. Count 12/20/2015 YB2/RF5X WICKLIFFE KEG4383 12/22/2015 7/17/2015 TFVDTGVL asdf WICKLIFFE KEG4383 12/22/2015 3/8/2016 YB2/RF5X WICKLIFFE KEG4383 0 0	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 12/20/2015 YB2/JRF5X WICKUFFE KEG4383 12/22/2015 1 7/17/2015 TFVDTGYL asdf asdf WICKUFFE KEG4383 0 0 3/8/2016 YB2/JRF5X WICKUFFE KEG4383 0 0

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 O	f Material Sur	mmary	
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 Select All Maintain Export Inspect, Service Event Reprint DataBook Assign Owner Master Tag Replace Total Assets: 2429 sterisk indicates the ID is part of a Master Tag. Export to view details. 12345678910 .. Location 1 **Product:Modifier** Equip. PTS ID Crit. Next Insp. Replace Vin/Serial Assembly Location 2 722803 HOSE 0----× 1 30E135UM* NU FLOW MIDWEST EB000052 722803 TEST 3/1/16 HOSE R5D016TV* 03/01/2017 02/10/2021 Med × à NU FLOW MIDWEST EB000052 42153 SCHILLING ROV A.RESEVOIR HOSE E × ☑ 2G4VI3X6* ٨ 101-6605 AUX PUMP UHD75

5.1 Inspection without an Inspection Template

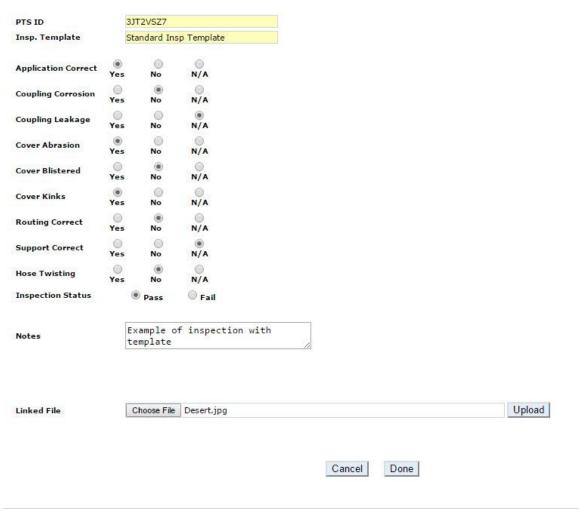
If an asset does not have an inspection template, the inspection process will result in a simple Pass/Fail, notes entry and attachment selection. If *Fail* is specified, additional entries will appear for a standard failure reason and a free form entry if <Other> is specified.

PTS ID	2G4VI3X6		
Inspection Status	Pass Fail		
Notes	Failed		
Failure Reason:	<other></other>	×	
Other Failure Reason	n:Other Test		
Linked File	Choose File Desert.jpg		Upload
Linked File	Children Descrippy		opioud
		Cancel Done	

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.





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.

PTS ID	1	OE135UM			
Insp. Template					
Application Correct) Yes	No	N/A		
Coupling Corrosion	۲	۲	0		
	Yes	No	N/A		
Coupling Leakage) Yes	No	N/A		
Cover Abrasion) Yes) No	N/A		
Cover Bend Radius) Yes	No	N/A		
Cover Blistered	0	۲	0		
	Yes	No	N/A		
Cover Flattening	• Yes	No	N/A		
Cover Indentation	Yes	() No	N/A		
Cover Kinks	() Yes	No	0		
	O		N/A		
Routing Correct	Yes	No	N/A		
Cover Cracks) Yes	No	N/A		
Hose Twisting	0	۲	0		
	Yes	No	N/A		
Inspection Status		Pass	Fail		
	1	ailed			
Notes				//	
Failure Reason:	<no< td=""><td>ne></td><td></td><td></td><td></td></no<>	ne>			
Other Failure Reaso	n:				
Linked File	[Choose File	No file chosen		

5.4 Inspection History

ASSET MANAGEMENT

₹.	Search Parar	neters								
S	elect All Main	tain Export Inspe	ct S	ervice Event Reprir	t DataBook Assign Owner	Master Tag Replac	e			
	tal Assets: 24 terisk indicates the I	D is part of a Master Tag. Ex	port to vi	1	2345678910					_
	PTS ID	Location 1	Crit.	Equip.	Product:Modifier	Next Insp.	Replace			
	1310	Location 2	CI IL.	Vin/Serial	Assembly	Next Insp.	Replace			
-	30E135UM*	722803			HOSE				0	×
	50E1350M	NU FLOW MIDWEST		EB000052						17
		722803		TEST 3/1/16	HOSE			-	0-	
1	R5D016TV*	NU FLOW MIDWEST	Med	EB000052	42153	03/01/2017	02/10/2021	13		×

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

Back PTS ID:R5D016TV		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	0



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

'S ID	R5D016TV		14
sp. Template	Test for 3/1	/16	
pplication Correct	• Yes	No No	• N/A
1/18/15	Yes	No No	N/A
emplate Test	• Yes	No	[⊙] N/A
nspection Status	Pass	🔍 Fail	
lotes	yES		
Linked File Choose File No file chosen		Un	load

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.

Select All	Maintain	Export	Inspect	Service Event	Reprint	DataBook	Assign Owner	Master Tag	Replace
				h	2				

Total Assets: 2423

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

		Location 1		Equip.	Product:Modifier				
	PTS ID	Location 2	Crit.	Vin/Serial	Assembly	Next Insp.	Replace		
1	30E135UM*	722803			HOSE			011	×
	30E1350M*	NU FLOW MIDWEST		EB000052				1	^
	R5D016TV*	722803	Med	TEST 3/1/16	HOSE	03/01/2017	02/10/2021	82	×
•	KSDOIGTV	NU FLOW MIDWEST	meu	EB000052	42153	05/01/2017	02/10/2021	-	1
1		A.RESEVOIR		SCHILLING ROV	HOSE			0-	1
•	2G4VI3X6*	AUX PUMP		UHD75	101-6605	Failed		0	×
	CDCUDUU0X	A.RESEVOIR		SCHILLING ROV	HOSE			0-	
•	6RSUPMHO*	AUX PUMP		UHD75	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

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.

		Location 1	c. 14	Equip.	Product:Modifier		Distant and			
	PTS ID	Location 2	Crit.	Vin/Serial	Assembly	Next Insp.	Replace			
1	2054251848	722803			HOSE				011	*
	30E135UM*	NU FLOW MIDWEST		EB000052						1
	R5D016TV*	722803	Mad	TEST 3/1/16	HOSE	03/01/2017	02/10/2021		011	
2	RSD016TV*	NU FLOW MIDWEST	Med	EB000052	42153	03/01/2017	02/10/2021	3		
		A.RESEVOIR		SCHILLING ROV	HOSE				0-1	
2	2G4VI3X6*	AUX PUMP		UHD75	101-6605			3	011	*

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

S	elect All Mair	tain Export Inspe	ct Se	ervice Event Reprint	DataBook Assign Owner	Master Tag Replac	e			_
	tal Assets: 2 terisk indicates the I	D is part of a Master Tag. Ex	port to vi	1 2	2 3 4 5 6 7 8 9 10					
	PTS ID	Location 1	Crit.	Equip.	Product:Modifier	Next Insp.	Replace			1
	PISID	Location 2	crit.	Vin/Serial	Assembly	Next Insp.	Keplace			l
	2054251048	722803			HOSE				0	1
	30E135UM*	NU FLOW MIDWEST		EB000052					182	
		722803		TEST 3/1/16	HOSE				0-	Ì
	R5D016TV*	NU FLOW MIDWEST	Med	EB000052	42153	03/01/2017	02/10/2021	3		
		A.RESEVOIR		SCHILLING ROV	HOSE			-		
1	2G4VI3X6*	AUX PUMP		UHD75	101-6605			B	0	l

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	Cover Image	
Enter Your Title	Choose File No file chosen Upload Clear	The second
Email Report	(Email Report is recommended for Large Asset Databooks)	
Databook Information		
Enter any information to appear on the first page of	the DataBook	
		1935/20

8.1 DataBook Contents

- Asset Details
- Comments
- Bill of Material
- Asset Management History
- Application
 I
 Data
- Inspection Templates

- Inspection History (by User)
- Replacement
 History
- Approvals

- Specifications
- Attachments
- 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

erisk indicates the II	D is part of a Master Tag. Ex	port to vi		2 3 4 5 6 7 8 9 10					
DTC ID	Location 1	0.11	Equip.	Product:Modifier	at any training	Developer.			
PISID	Location 2	Crit.	Vin/Serial	Assembly	Next Insp.	керіасе			
205125114*	722803			HOSE				82	*
SOE1350M	NU FLOW MIDWEST		EB000052					-	1
DEDOT CTU	722803	and a	TEST 3/1/16	HOSE	02/01/2017	02/10/2021		12-1	
RSDOIGIV	NU FLOW MIDWEST	Med	EB000052	42153	03/01/2017	02/10/2021	0	:=	
	A.RESEVOIR	8	SCHILLING ROV	HOSE	1.			100	
2G4VI3X6*	AUX PUMP		UHD75	101-6605	0.7		3	==	×
	PTS ID 30E135UM* R5D016TV* 2G4VI3X6*	Location 1 Location 2 30E135UM* 722803 NU FLOW MIDWEST R5D016TV* 722803 NU FLOW MIDWEST 2G4VI3X6*	Location 1 Crit. Location 2 Crit. 30E135UM* 722803 NU FLOW MIDWEST NU FLOW MIDWEST R5D016TV* 722803 NU FLOW MIDWEST Med 2G4VI3X6* A.RESEVOIR	Location 1 Crit. Equip. Location 2 Crit. Vin/Serial 30E135UM* 722803 EB000052 RSD016TV* 722803 Med NU FLOW MIDWEST EB000052 RSD016TV* A.RESEVOIR EB000052 2G4VI3X6* A.RESEVOIR SCHILLING ROV	Location 1 Crit. Equip. Product:Modifier JOE135UM* 722803 Vin/Serial Assembly NU FLOW MIDWEST EB000052 HOSE 722803 Med EB000052 HOSE NU FLOW MIDWEST Med EB000052 42153 RSD016TV* ARESEVOIR SCHILLING ROV HOSE	Location 1 Equip. Product:Modifier Next Insp. JOE135UM* 722803 Vin/Serial Assembly Next Insp. JOE135UM* 722803 EB000052 HOSE O3/01/2017 R5D016TV* 722803 Med TEST 3/1/16 HOSE 03/01/2017 2G4VI3X6* ARESEVOIR SCHILLING ROV HOSE 03/01/2017	PTS ID Location 1 Location 2 Equip. Product:Modifier Next Insp. Replace 30E135UM* 722803 NU FLOW MIDWEST	12345678910 PTS ID Location 1 Location 2 Full. Product:Modifier Next Insp. Replace 30E135UM* 722803 NU FLOW MIDWEST	Location 1 Crit. Equip. Product:Modifier Next Insp. Replace Re

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? Proceed

Back	Cancel
------	--------

Search: <Account> <Company>

1									
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				83 23				
PTS Pro Cert Account	PROCERT		6035 Parkland Boulevard		CLeveland	OH	44124		
	PTS TEST CUSTOMER PTS Tech Tour	PTS TEST CUSTOMER PTS TEST PTS Tech Tour TechTour	PTS TEST CUSTOMER PTS TEST PTS Tech Tour TechTour	PTS TEST CUSTOMER PTS TEST 6035 Parkland Blvd PTS Tech Tour TechTour	PTS TEST CUSTOMER PTS TEST 6035 Parkland Blvd PTS Tech Tour TechTour	PTS TEST CUSTOMER PTS TEST 6035 Parkland Blvd Cleveland PTS Tech Tour TechTour	PTS TEST CUSTOMER PTS TEST 6035 Parkland Blvd Cleveland OH PTS Tech Tour Tech Tour		

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

	070 10	Location 1		Equip.	Product:Modifier		Barris and			
	PTS ID	Location 2	Crit.	Vin/Serial	Assembly	Next Insp.	Replace			
1	205125008	722803		10	HOSE				011	×
1	30E135UM*	NU FLOW MIDWEST		EB000052					1	^
1	DEDOTOTIVE	722803		TEST 3/1/16	HOSE	02/01/2017	02/10/2021		0	
	R5D016TV*	NU FLOW MIDWEST	Med	EB000052	42153	03/01/2017	02/10/2021	B		~
ĺ		A.RESEVOIR		SCHILLING ROV	HOSE				0-	
)	2G4VI3X6*	AUX PUMP		UHD75	101-6605					*
1	6RSUPMHO*	A.RESEVOIR	0	SCHILLING ROV	HOSE				0	
1	BKSUPMHO*	AUX PUMP		UHD75	101-6605				0.11	*

MASTE	Master	Tag		
Custom	Data	Tags / Equipme		
Label Printer	PTSHPD8IN	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

Total Accets: 2423

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

	DTC ID	Location 1		Equip.	Product:Modifier		Desite and			
	PTS ID	Location 2	Crit.	Vin/Serial	Assembly	Next Insp.	Replace			
	2051251114	722803			HOSE				011	
	30E135UM*	NU FLOW MIDWEST		EB000052						ľ
	R5D016TV*	722803		TEST 3/1/16	HOSE	03/01/2017	02/10/2021		8= 	
1	KSDOI6IV"	NU FLOW MIDWEST	Med	EB000052	42153	05/01/2017	02/10/2021	0	-	ľ

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

S Order Info	6			
Same Custon	ner Info as PTSID			
Order Number				
Customer PO#				
Customer #		Ship To #		Same as Billing information
Name	<customer name=""></customer>	Name	<ship name="" to=""></ship>	
Address	<customer address=""></customer>	Address	<ship address="" to=""></ship>	
City	<city></city>	City	<city></city>	
State/Prov/Reg		State/Prov/Reg		
Zip/Postal Code	<zip></zip>	Zip/Postal Code	<zip></zip>	
Country	•	Country		
Contact Name				
Email				
Phone				
Fax				
Mobile				

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).

	ng 1 F	Length			
	Create Excel List	1.1	ments		
Replacement Information	оп				
Reason Other Reason					
Replacement Notes				1	
Label					
Custom Data 1					- F
Custom Data 2					
Custom Data 3					
Override all	Browse.				
lose Integrity Management	ė.				
riticality		٣			
nspection Cycle		¥.	From	Create Date 🔻	6/16/2016
nspection Template		Ŧ		Set Inspection	at Print
eplacement Cycle		٣	From	Create Date 🔻	6/16/2016
Overrid <mark>e Asset Mgmt.</mark>				Set Replaceme	ent at Print
inter 1 (4")		Label Fo	rmat		
oPTSPrint	•	PartLab		•	
inter 2 (8")		Label Fo	rmat		

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

TS ID	R5D016TV				View in Asset Mgmt	Done	Update	Replace	Duplicate	Reprint	Cancel
Priginator: roduct Type: sset Status: laster Tag(s):	Parker Hannifin - Hose Assembly Exists WUJU402P	Hose Product Asset ⁻		Parent Item					~	New York	
	Private	Ø Ove	rride Edits							No.	
Customer Info	Originators Orde	er Info Bil	l of Materials	Alt Bill of Materia	Application Data	Replacem	ent Details				
Reason											
Other Reason											
Replacement N	lotes										
Linked File	Cho	ose File No	file chosen				U	pload			
PTS ID	Creation Da	te	Replacer	nent Date R	eplacement Reaso	n		1			
		47.40 044	2/10/2016	5 12:02:51 PM C	OVER ABRASION			1			
CE5HNBFO	7/17/2015 4:	47:40 PM									
	7/17/2015 4: 2/10/2016 12			5 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.

	Location 1		Equip.	Product:Modifier			
PTS ID	Location 2	Crit.	Vin/Serial	Assembly	Next Insp.	Replace	
30E135UM*	722803	Ĩ		HOSE			

SEARCH/CREATE PTS ID

PTS ID				View in Asset Mgmt	Done	Update	Replace	Duplicate	Reprint	Cancel
Originator: Product Type: Asset Status:	Parker Hannifin - H Hose Assembly Exists	ose Products Division 🚺 Asset Type:	Parent Item							
Asset Status:	Private	Override Edits								- Bulleton

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

Mfgr Part	471TC06	3C040404-10	1							
Base Part Number	471TC-4		1/4"-11237-1 2SC-	5800PSI						
OAL	0.000	in 🔻								
Offset Angle		degrees								
Label										
Customer Part	T33550	01-09-017								
Custom Data 1	GREASE	PLUMBING		Default						
Custom Data 2	PELLET	FLUSH		Browse						
Custom Data 3				Memorize						
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 🔻			
			2							
							•			
							•			
								5		
			2				T			
									Apply	
				<u>.</u>	0	13		10		
Comment										
Installation/routing										

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.

AS	SSET MAN	AGEMENT										
≥:	Search Parar	neters										
S	elect All Main	tain Export Inspe	ct S	ervice Event Reprir	t DataBook Assign Owner	Master Tag Replac	e					
	tal Assets: 24 terisk indicates the II	423 D is part of a Master Tag. Ex	port to vi		2 3 4 5 6 7 8 9 10							
	PTS ID	Location 1				Equip.	Product:Modifier		Developer			
	PISID	Location 2	Crit.	Vin/Serial	Assembly	Next Insp.	Replace					
-		722803			HOSE				011	-		
	30E135UM*	NU FLOW MIDWEST		EB000052					18=	×		
	DEDOLET #	722803		TEST 3/1/16	HOSE	02/01/2017	02/10/2021	EX.	19-1			
	R5D016TV*	NU FLOW MIDWEST	Med	EB000052	42153	03/01/2017	02/10/2021		011	1		

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

Selection	Inspections			•		Clear All Field
Date Range	From	<u> </u>	То			Searc
	Scheduled	O Uns	schedule	ed Completed	III (III)	
Replacement Reason				•		
Inspection Template	Any		•			
Inspection Status	O Pass	🔘 Fail	• AI	I		
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						

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.

12	3 4	4 5	6	7	8	9	10	

	TC ID	Location 1	Cuit	Equip.	Product:Modifier	ALCO A TOTAL	Dealers			
P		Location 2	Crit.	Vin/Serial	Assembly	Next Insp.	Replace			
	20512511M*	722803			HOSE				0-1	
30E135UM*	NU FLOW MIDWEST		EB000052				8	0	*	