



Parker Tracking System

Essential Account Settings

Fast. Easy. Accurate.

Release 8.16 | Version 2

Parker Hannifin Corporation

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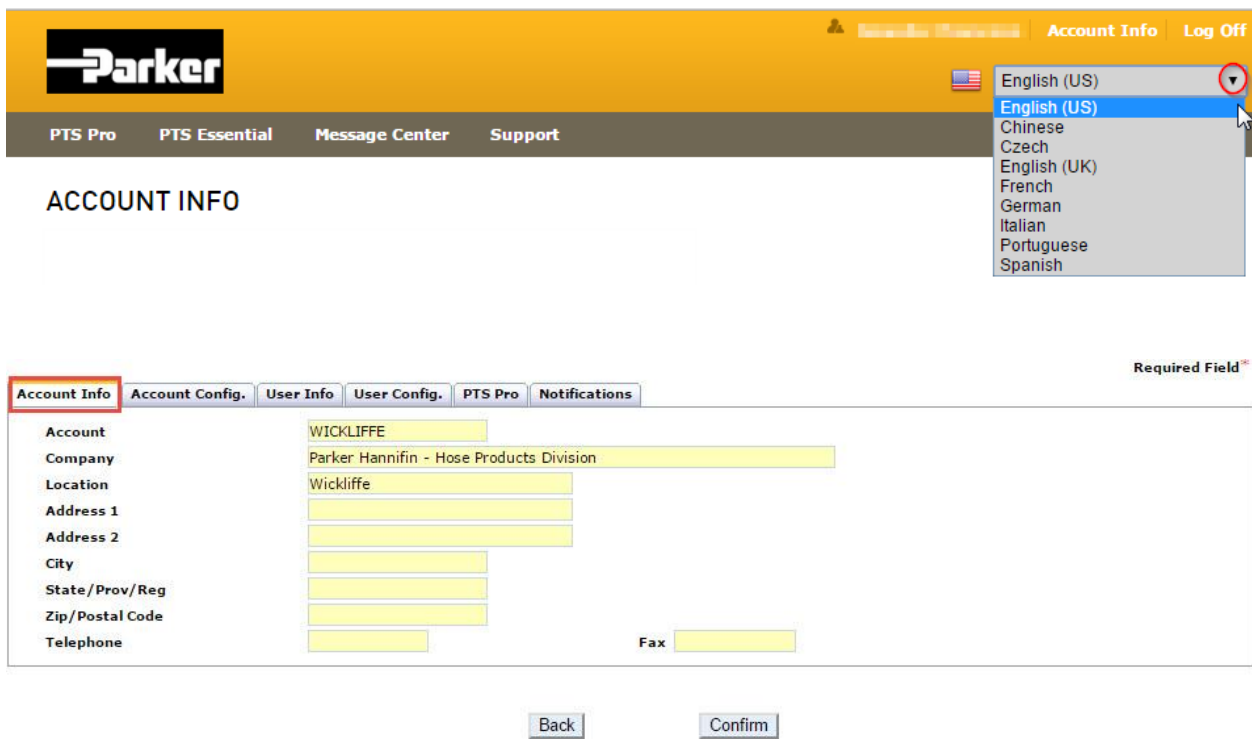
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1. Language Preference

To change the default language, select the preferred Country using the dropdown menu in the navigation toolbar.

To edit the account settings, *click* 'Account Info' in the upper right corner of the screen.



The screenshot shows the Parker account settings interface. At the top, there is a navigation toolbar with the Parker logo, a user profile icon, and links for 'Account Info' and 'Log Off'. A language dropdown menu is open, showing options: English (US), Chinese, Czech, English (UK), French, German, Italian, Portuguese, and Spanish. Below the toolbar, there are links for 'PTS Pro', 'PTS Essential', 'Message Center', and 'Support'. The main content area is titled 'ACCOUNT INFO'. Below this, there are tabs for 'Account Info', 'Account Config.', 'User Info', 'User Config.', 'PTS Pro', and 'Notifications'. The 'Account Info' tab is active and contains a form with the following fields: Account (WICKLIFFE), Company (Parker Hannifin - Hose Products Division), Location (Wickliffe), Address 1, Address 2, City, State/Prov/Reg, Zip/Postal Code, Telephone, and Fax. A 'Required Field*' label is present in the top right of the form area. At the bottom of the form, there are 'Back' and 'Confirm' buttons.

Update the Account Information tab with details for the account including; **Account** name, **Company** or Division, **Location**, **Address**, **City**, **State**, **Zip**, **Telephone** and **Fax** numbers.

1.1 Account Config: General

1. Select **Mark Private** to limit access to the Customer Info, Competitor Data and Application data for this PTS ID to the originator's account and account group.

The privacy function will not limit the access to view the 'Bill of Materials /Order Details' or the Replacement Details. The 'Customer Info' (end customer info) is always limited to the originators account & account group.

2. To disable visibility to the 'Bill of Materials' details select **Admin Lock Records**

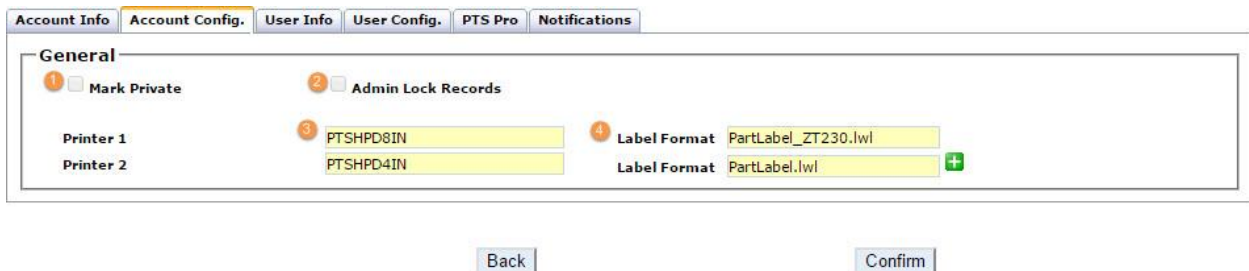
To enable this functionality accounts must be enrolled in **PTS Pro** and the account must remain active. The record must have an **owner assigned**, complete with phone, email and customer address, as well as a **location value** set and **planned inspection or replacement dates**. Transferring a record would automatically disable this feature

***Note:** this function is not a recommended best practice by the Parker Tracking System administration

Print:

3. Many organizations have labeling printers that are not specific to Parker Tracking System. Using the Printer 1 & 2 options listed under 'General' will allow users the ability to select non-specified PTS hose printers to create labels.

4. Set the label format for the general printers. The standard label format for PTS is **PartLabel.lwl**; however, other formats are available including customer logo options. Contact PTS support to inquire about alternative options.



Account Info | **Account Config.** | User Info | User Config. | PTS Pro | Notifications

General

1 Mark Private 2 Admin Lock Records

Printer 1 3 PTSHPD8IN 4 Label Format PartLabel_ZT230.lwl

Printer 2 PTSHPD4IN Label Format PartLabel.lwl +

Back Confirm

1.2 Account Config: Hose

5. Check the following to print additional labels for assemblies over a specified length: Length (in.) >=

Check for additional labels to print for hoses greater than a specified outside diameter (OD): Part OD (xx/16 in.) >=

6. Specify the printer intended to produce 4" and 8" labels for the above duplicates. If only one printer is utilized, each field will have the same value. Contact Parker PTS if you did not receive a printer name with your startup information.


7. Set the label format for the printers

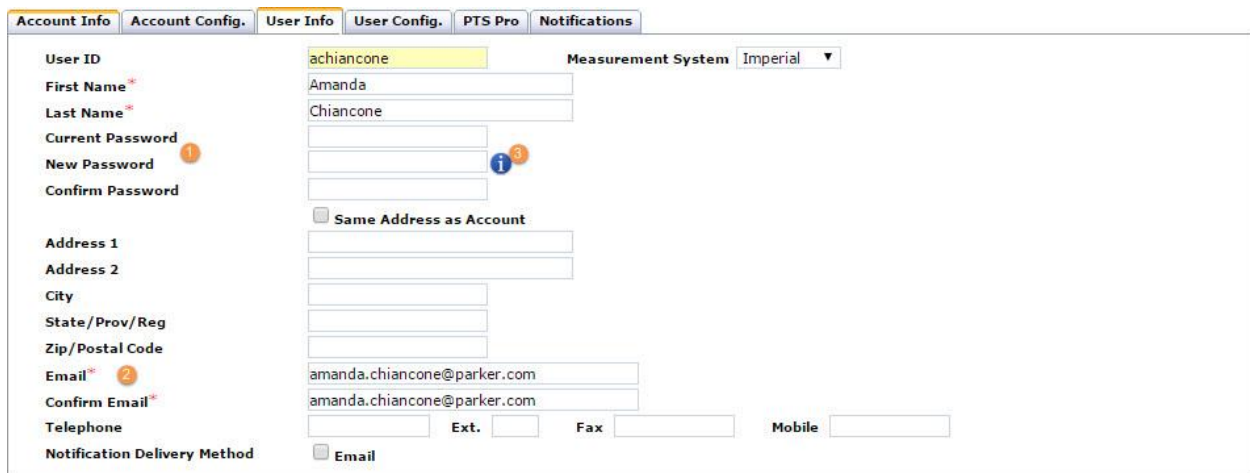
8. Default values to print on all tags created by users for this account. Values can be over-written before printing.

9. If you wish to replace the terminology "Custom Data 1" from your webpage, list values in these fields. For example, instead of "Custom Data 1" you could enter "Company Name" to clarify the desired information.

10. Adds a prefix to information entered in the custom data fields

2 User Info

1. Reset password
2. Select delivery method for PTS notifications
3.  Requirements details for User ID and/or Password



The screenshot shows the 'User Info' configuration page in a web application. The page has a navigation bar with tabs: 'Account Info', 'Account Config.', 'User Info' (selected), 'User Config.', 'PTS Pro', and 'Notifications'. The form contains the following fields and options:

- User ID:** Text input with value 'achiancone'. A yellow highlight is present.
- Measurement System:** Dropdown menu with value 'Imperial'.
- First Name:** Text input with value 'Amanda'.
- Last Name:** Text input with value 'Chiancone'.
- Current Password:** Text input.
- New Password:** Text input with an information icon (1) and a red '2'.
- Confirm Password:** Text input with an information icon (3).
- Same Address as Account:** Unchecked checkbox.
- Address 1:** Text input.
- Address 2:** Text input.
- City:** Text input.
- State/Prov/Reg:** Text input.
- Zip/Postal Code:** Text input.
- Email:** Text input with value 'amanda.chiancone@parker.com' and a red '2'.
- Confirm Email:** Text input with value 'amanda.chiancone@parker.com'.
- Telephone:** Text input.
- Ext.:** Text input.
- Fax:** Text input.
- Mobile:** Text input.
- Notification Delivery Method:** Unchecked checkbox labeled 'Email'.

3 User Config.

1. Users may specify the printer used to print labels
2. Label formats may also be specified for individual users

i This feature will override printer and label format designated in the Account Config. tab

Account Info	Account Config.	User Info	User Config.	PTS Pro	Notifications
Hose					
1 Printer 1 Override (4")	[Your 4" Label Printer]	2 Label Format Override	PartLabel.lwl		
Printer 2 Override (8")	[Your 8" Label Printer]	Label Format Override	PartLabel.lwl		