



# Parker Tracking System

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## How To Create A Label Standard

Fast. Easy. Accurate.

Release 7.16 | Version 1

**Parker Hannifin Corporation**

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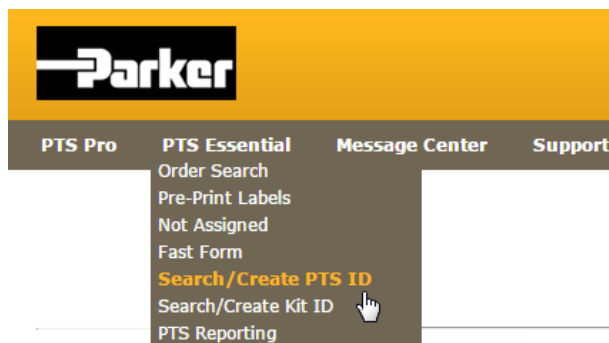
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## How to Create a Label (Standard)

### 1: Search/Create PTS ID

Navigate to 'PTS Essential' and click **Search/Create PTS ID** from the menu



To create a new PTS tag, *click* on screen is displayed:

Create new PTS ID:

and the following

### SEARCH/CREATE PTS ID

Search for PTS ID:



Search for PTS ID

Create new PTS ID:



Create New PTS Record

## 2: Customer Info Screen

To limit access to the originator's account and account group check  **Private** to hide the 'Customer Info, Alt Bill of Material and Application Data' for this PTS ID.

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

**i** Order Number, Customer PO#, Customer #, and Ship To # can all be used to filter reports in PTS Reporting and Asset Management. Make sure to fill out at least one of these fields.

### SEARCH/CREATE PTS ID



PTS ID


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

**Create Options...**    **Label Options...**  
 New     Duplicate     Print     Pre-Printed     RFID

| Customer Info  | Bill of Materials                    | Alt Bill of Material        | Application Data |
|--|--------------------------------------|-----------------------------|------------------|
| Order Number <input type="text"/><br>Customer PO# <input type="text"/> |                                      |                             |                  |
| <input type="checkbox"/> Same as Billing information.                  |                                      |                             |                  |
| Customer # <input type="text"/>  | Ship To # <input type="text"/>       |                             |                  |
| Name <input type="text"/>  | Name <input type="text"/>            |                             |                  |
| Address <input type="text"/>   | Address <input type="text"/>         |                             |                  |
| City <input type="text"/>  | City <input type="text"/>            |                             |                  |
| State/Prov/Reg <input type="text"/>                                    | State/Prov/Reg <input type="text"/>  |                             |                  |
| Zip/Postal Code <input type="text"/>                                   | Zip/Postal Code <input type="text"/> |                             |                  |
| Country <input type="text"/>   | Country <input type="text"/>         |                             |                  |
| Contact Name <input type="text"/>                                      |                                      |                             |                  |
| Email <input type="text"/>   |                                      |                             |                  |
| Phone <input type="text"/>   | Fax <input type="text"/>             | Mobile <input type="text"/> |                  |

### 3: Bill of Material Screen

|                               |  |
|-------------------------------|--|
| <b>Mfgr Part</b>              | Hose assembly part number (free form text, no error checking)  |
| <b>Base Part Number</b>       | <b>Will populate hose details based on the Component Part</b>  |
| <b>OAL</b>                    | Overall Length of hose assembly ( <u>required</u> )<br>Use only if two (2) elbow fittings are listed in BOM  |
| <b>Label: Customer Part</b>   | Free form text which <u>appears on the label</u> with a bar code   |
| <b>Label: Custom Data 1-3</b> | Three lines of text <u>appearing on the label</u> . A system default for these fields can be set on the 'Account Info' page  |
| <b>Component Part</b>         | List part numbers included in your assembly. Type part numbers in manually or <i>click</i> the  button to do a search ( <u>required</u> ) |
| <b>Quantity</b>               | List the correct quantity of each part number ( <u>required</u> )  |
| <b>Length</b>                 | List the cut length of the hose or fittings/components (optional). This field is required for selected accessories   |
| <b>QC Code</b>                | Add quality information (i.e., crimp specifications)   |
| <b>Comment</b>                | Free form text that remains with the record being created. <i>Click</i> on the  to add comments to the record                             |

 Check box titled  **Override Edits** in the create ID details pane to change the bill of materials to free form text.

Customer Info **Bill of Materials** Alt Bill of Material Application Data

Mfgr Part

Base Part Number  5/8"-J1942-3000 PSI

OAL

Offset Angle  degrees

**Label**

Customer Part

Custom Data 1

Custom Data 2

Custom Data 3

| Component Part (partial for search)  | Quantity                       | Length                          | Angle                | U/M                             | QC Code              |                                  |
|--|--------------------------------|---------------------------------|----------------------|---------------------------------|----------------------|----------------------------------|
| <input type="text" value="451TC-10"/> <input type="text" value="Hose"/> <input type="button" value="🔍"/>       | <input type="text" value="1"/> | <input type="text" value="70"/> | <input type="text"/> | <input type="text" value="in"/> | <input type="text"/> | <input type="button" value="✖"/> |
| <input type="text" value="10343-10-10"/> <input type="text" value="Fitting"/> <input type="button" value="🔍"/> | <input type="text" value="2"/> | <input type="text"/>            | <input type="text"/> | <input type="text"/>            | <input type="text"/> | <input type="button" value="✖"/> |
| <input type="text"/> <input type="button" value="🔍"/>  | <input type="text"/>           | <input type="text"/>            | <input type="text"/> | <input type="text"/>            | <input type="text"/> |                                  |
| <input type="text"/> <input type="button" value="🔍"/>  | <input type="text"/>           | <input type="text"/>            | <input type="text"/> | <input type="text"/>            | <input type="text"/> |                                  |
| <input type="text"/> <input type="button" value="🔍"/>  | <input type="text"/>           | <input type="text"/>            | <input type="text"/> | <input type="text"/>            | <input type="text"/> |                                  |
| <input type="text"/> <input type="button" value="🔍"/>  | <input type="text"/>           | <input type="text"/>            | <input type="text"/> | <input type="text"/>            | <input type="text"/> |                                  |
| <input type="text"/> <input type="button" value="🔍"/>  | <input type="text"/>           | <input type="text"/>            | <input type="text"/> | <input type="text"/>            | <input type="text"/> |                                  |
| <input type="text"/> <input type="button" value="🔍"/>  | <input type="text"/>           | <input type="text"/>            | <input type="text"/> | <input type="text"/>            | <input type="text"/> |                                  |
| <input type="text"/> <input type="button" value="🔍"/>  | <input type="text"/>           | <input type="text"/>            | <input type="text"/> | <input type="text"/>            | <input type="text"/> |                                  |
| <input type="text"/> <input type="button" value="🔍"/>  | <input type="text"/>           | <input type="text"/>            | <input type="text"/> | <input type="text"/>            | <input type="text"/> |                                  |
| <input type="button" value="Apply"/>   |                                |                                 |                      |                                 |                      |                                  |

**Comment**

ADD COMMENTS

## 4: Alt Bill of Material

Use the 'Alt Bill of Material' details to add specific information, or alternate component details, for this assembly.

### SEARCH/CREATE PTS ID

**PTS ID**

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

**Create Options...**    **Label Options...**

New     Duplicate     Print     Pre-Printed     RFID

Customer Info    Bill of Materials    **Alt Bill of Material**    Application Data

**Alt Mfgr Name**    <other> ▾  
**Name**      
**Part Number**      
**Product Line**      
**Notes**      
**Mfgr Date**       
**Alt OAL:**     in ▾  
**Alt Offset Angle:**     degrees

| Component Part       | Quantity             | Length               | Len U/M                | Angle                | QC Code              |
|----------------------|----------------------|----------------------|------------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> ▾ | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> ▾ | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> ▾ | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> ▾ | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> ▾ | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> ▾ | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> ▾ | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> ▾ | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> ▾ | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> ▾ | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> ▾ | <input type="text"/> | <input type="text"/> |

## 5: Application Data Screen

Use the following optional fields to add detailed descriptions to the record:

Use **'Location 1'**, **'Location 2'**, **'Equipment'**, and **'VIN/Serial Number'** to specify where an asset will be installed.

Designate **'Application'** data to give a specific location on a piece of equipment.

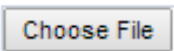
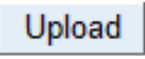
Stipulate **'Media'**, **'Media Temp'**, **'Environment'**, **'Environment Temp'**, **'Pressure'**, **'Bend Radius'** to outline the system parameters.

Identify the **Criticality** of the assembly. For example, return lines might likely be listed as 'Low' while full pressure hoses located near operators may be listed as 'High'. Selecting a criticality will automatically load the default inspection and replacement schedules that have been set in the 'Account Info' section (see the 'Account Settings' and 'Pro Schedule Inspection & Replacement' modules for more information).

Use **'Repair'** to specify whether repairs should be completed in the field or in a service facility.

Add the date the assembly was created if details are being added after initial create date, or the date the assembly has gone into production by using the **Registration Date** calendar selector.

Attach a file to a record that can be accessed at a later time by utilizing **'Linked**

**File'**. Click  to locate a file and  to add it to the record.



### SEARCH/CREATE PTS ID

PTS ID:

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

**Create Options...**    **Label Options...**  
 New     Duplicate     Print     Pre-Printed     RFID

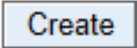
| Customer Info  | Bill of Materials   | Alt Bill of Material  | Application Data  |
|--|---|---|---|
| Location 1: <input type="text" value="POWER UNIT 1001"/>   |   | Location 2: <input type="text" value="FROM RESERVOIR TO PUMP"/> |   |
| Equipment: <input type="text" value="RIG WALKER"/>   |   | VIN/Machine#: <input type="text" value="123456789"/>            |   |
| Application: <input type="text" value="Pump"/> <Inlet Description> <input type="text"/> <>    Valve <input type="text"/> <Outlet Description> <input type="text"/> |   |   |   |
| Media  | <input type="text" value="Petroleum-Based Hydraulic Oils"/> | Media Temp  | <input type="text" value="38°C-68°C (100°F-154°F)"/>              |
| Environment  | <input type="text" value="OUTSIDE"/>                        | Environment Temp  | <input type="text" value="0°C-37°C (32°F-99°F)"/>                 |
| Pressure   | <input type="text" value="1500-3000 psi (104 - 207 bars)"/> | Bend Radius   | <input type="text" value="12"/>                                   |
| Criticality  | <input type="text" value="Med"/>                            | Repair  | <input checked="" type="radio"/> Shop <input type="radio"/> Field |
| Registration Date  | <input type="text"/>  |   |   |
| Linked File  | <input type="button" value="Choose File"/> No file chosen   |   | <input type="button" value="Upload"/>                             |
| File Name  |   | Date  | Size  |
| <input type="text"/>   |   | <input type="text"/>  | <input type="text"/>  |

## 6: Create Record

**PTS ID**

Create

Cancel

Once the record is complete, *click* the  button to advance to the print screen.

## 7: PTS Print Screen

Change the '**Print Quantity**' to increase or decrease the number of tags printed. Tags created using this function will be for a different assembly/asset with identical record information. Each tag will have a different PTS ID with its own record.

Check the boxes next to '**OD**' or '**Length**' to print identical tags for hoses with large diameters and/or long overall length. Each tag will have identical PTS ID's and no additional online records will be created.

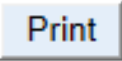
Verify the '**Label**' information is correct before printing; this text will appear on your label.


**Asset Management** functionality is available for users that have access to PTS Pro. To learn more about the functionality of Pro, or to enroll, please contact your Parker PTS representative.

- **Criticality:** Using the drop down menu select the criticality which will automatically load the default inspection and replacement schedules that have been set in the 'Account Info' section
- **Inspection & Replacement Cycle:** Cycles will automatically populate with details from the criticality levels and schedules that have been set in the 'Account Info' section. Users may also select **Manual Date** using the drop down menu to add custom dates for cycles.
- **Inspection Template:** Inspection templates can be created for system users to use during inspection cycles.

'**Label Printer**' shows the designated printer. Use the drop down menu to choose between printers.

'**Label Format**' shows the name of the label format that will be used. New accounts will list the default format. Custom labels can be created for accounts, please contact PTS Support for additional information.

Once complete, click  to create the PTS tag(s) and return to the main menu.

 **PTS Print**

**PTS ID**

**HA Number**

**Print Quantity**    **Print Duplicates for**  OD  Length

Attach PTS ID List to batch print

**Label**

|                      |   |
|----------------------|---|
| <b>Custom Data 1</b> | <input type="text" value="For Replacement or Service"/>   |
| <b>Custom Data 2</b> | <input type="text" value="Call 1-800-C-Parker or visit"/> |
| <b>Custom Data 3</b> | <input type="text" value="www.parker.com/pts"/>           |

**Asset Management**

|                            |                                   |                                  |  |
|----------------------------|-----------------------------------|----------------------------------|--|
| <b>Criticality</b>         | <input type="text"/>              | <input type="button" value="▼"/> |  |
| <b>Inspection Cycle</b>    | <input type="text"/>              | <input type="button" value="▼"/> | <b>From</b> <input type="text" value="Create Date"/> <input type="text" value="12/29/2015"/> |
| <b>Inspection Template</b> | <input type="text" value="None"/> | <input type="button" value="▼"/> | <input checked="" type="checkbox"/> Set Inspection At Print                                  |
| <b>Replacement Cycle</b>   | <input type="text"/>              | <input type="button" value="▼"/> | <b>From</b> <input type="text" value="Create Date"/> <input type="text" value="12/29/2015"/> |

 Set Replacement at Print

**Label Printer**   **Label Format**