



Parker Tracking System

How To Create A Metal Tag

Fast. Easy. Accurate.

Release 7.16 | Version 1

Parker Hannifin Corporation

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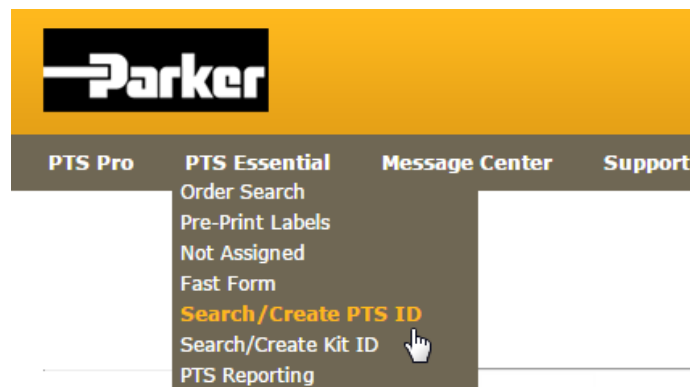
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How to Create a Metal Tag

1: Search/Create PTS ID

Click 'Search/Create PTS ID' from the PTS Essential navigation toolbar.



2: Search ID

Enter PTS ID from metal tag and *click Search*



SEARCH/CREATE PTS ID

Search for PTS ID:

Enter ID

Select **'New'** to creating a new record or **'Duplicate'** to begin with data from an existing PTS record.

PTS ID

* Search for PTS ID or select Create New to add

Create Options...

New Duplicate

3: 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
 Customer PO#



Same as Billing information.


Customer # Ship To #
 Name Name
 Address Address

City City
 State/Prov/Reg State/Prov/Reg
 Zip/Postal Code Zip/Postal Code
 Country Country

Contact Name
 Email
 Phone Fax Mobile

4: Bill of Material Screen

Mfgr Part	Hose assembly part number (free form text, no error checking)
Base Part Number	Will populate hose details based on the Component Part
OAL	Overall Length of hose assembly (<u>required</u>) Use only if two (2) elbow fittings are listed in BOM
Label: Customer Part	Free form text which <u>appears on the label</u> with a bar code
Label: Custom Data 1-3	Three lines of text <u>appearing on the label</u> . A system default for these fields can be set on the 'Account Info' page
Component Part	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>)
Quantity	List the correct quantity of each part number (<u>required</u>)
Length	List the cut length of the hose or fittings/components (optional). This field is required for selected accessories
QC Code	Add quality information (i.e., crimp specifications)
Comment	Free form text that remains with the record being created. <i>Click</i> on the  to add comments to the record
*Label	<i>Not used on metal tags.</i>

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

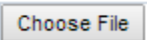
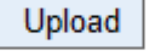
Stipulate **'Media'**, **'Media Temp'**, **'Environment'**, **'Environment Temp'**, **'Pressure'**, **'Bend Radius'** to outline the system parameters.

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: Location 2:

Equipment: VIN/Machine#:

Application: Pump <Inlet Description> <> Valve <Outlet Description>

Media: Media Temp:

Environment: Environment Temp:

Pressure: Bend Radius:

Criticality: Repair: Shop Field

Registration Date:


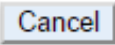
Linked File: No file chosen


File Name	Date	Size		

Step 6: Create

Once the record is complete, click the  button to finish.

SEARCH/CREATE PTS ID

PTS ID  

Originator: Parker Hannifin - Hose Products Division 

Product Type: Hose Assembly
Asset Status: Private Override Edits

Asset Type: Parent Item

Create Options...	Label Options...
<input checked="" type="radio"/> New <input type="radio"/> Duplicate	<input type="radio"/> Print <input checked="" type="radio"/> Pre-Printed <input type="radio"/> RFID