



# Parker Tracking System

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## Using The Update Template (Mass Maintenance)

Fast. Easy. Accurate.

Release 7.16 | Version 1

**Parker Hannifin Corporation**

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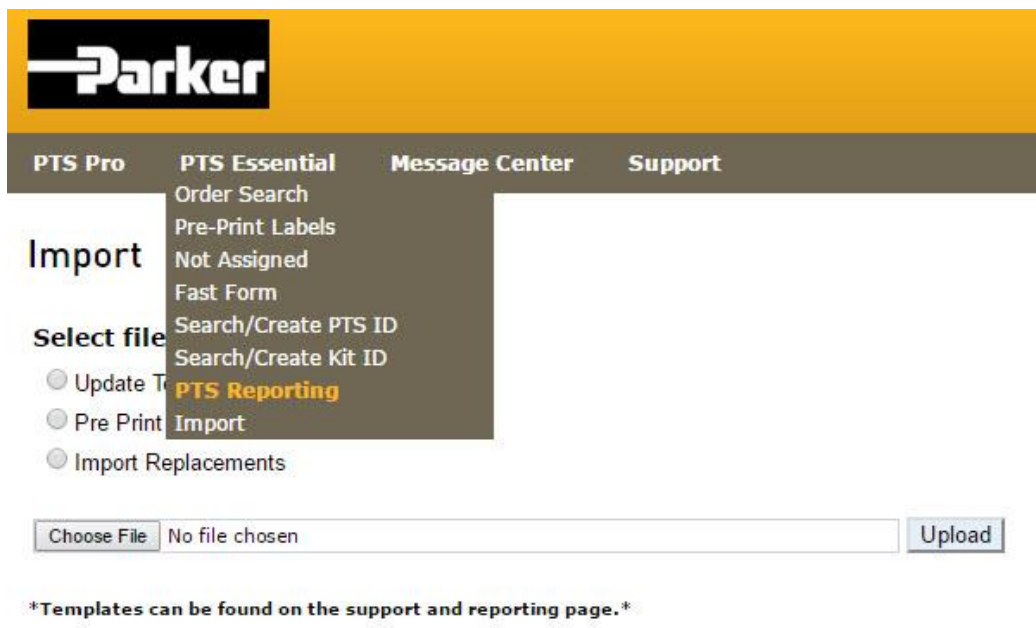
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# Using the Update Template (Mass Maintenance)

## 1: PTS Reporting

Begin by *clicking* the link titled ‘PTS Reporting’ from the PTS Essential navigation toolbar.




## 2: Status Selection

Within the search parameters, users MUST select “Active” from the **Status** dropdown list.

PTS Pro    PTS Essential    Message Center (10)    Support


### PTS REPORTING

 **Search Parameters**

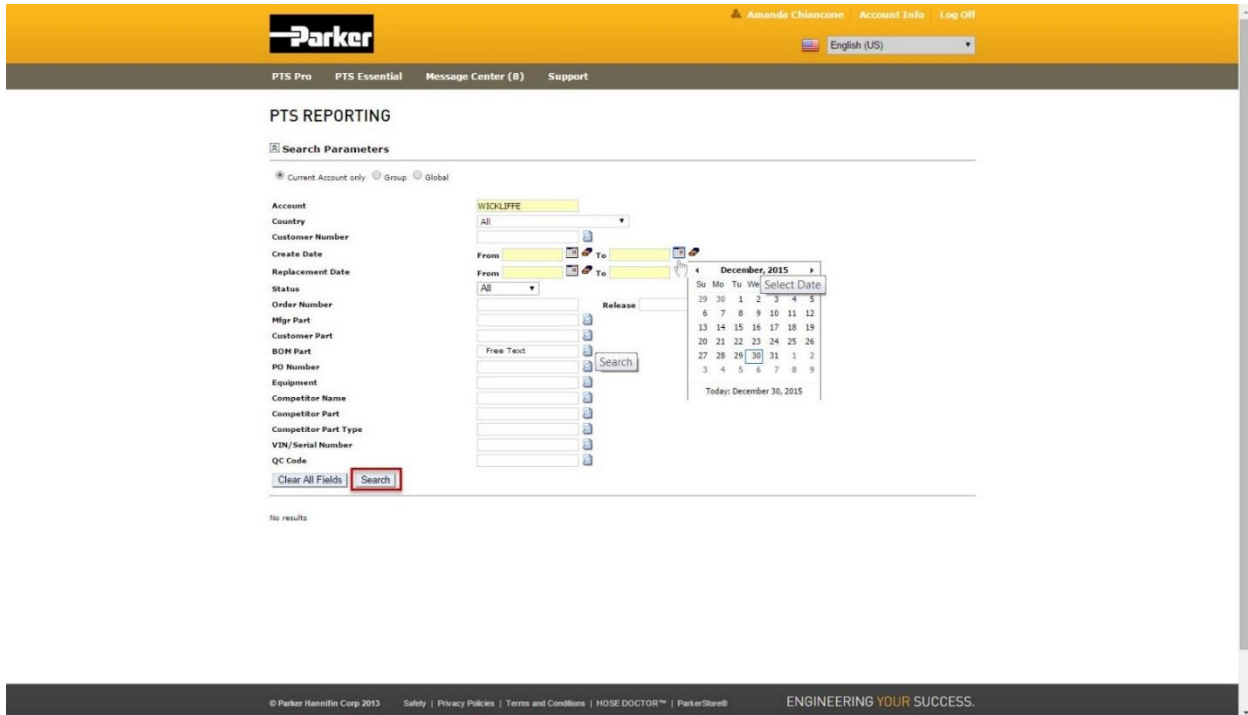
Current Account only     Group     Global

Account	WICKLIFFE
Country	All
Customer Number	<input type="text"/>
Create Date	From <input type="text"/> To <input type="text"/>
Replacement Date	From <input type="text"/> To <input type="text"/>
Ship Date	From <input type="text"/> To <input type="text"/>
Replacement Reason	<input type="text"/>
<b>Status</b>	All
Product Type	*All
Order Number	<input type="text"/> Release <input type="text"/>
Mfgr Part	<input type="text"/>
Customer Part	<input type="text"/>
BOM Part	<input type="text"/>
PO Number	<input type="text"/>
Equipment	<input type="text"/>
Alt Name	<input type="text"/>
Alt Part	<input type="text"/>
Alt Part Type	<input type="text"/>
VIN/Serial Number	<input type="text"/>
QC Code	<input type="text"/>
Application Element	*All
Application Element Data	<input type="text"/>

### 3: Using Search Parameters

From the available search parameters, select dates, specifications or record information to narrow the number of records that will generate. Users may choose options from the drop down menus, use free text or click the  icon to search for information.

Click  to view records



The screenshot displays the 'PTS REPORTING' search interface. At the top, there is a navigation bar with the Parker logo, user name 'Amanda Chiancone', and links for 'Account Info' and 'Log Off'. Below this is a secondary bar with 'English (US)' and navigation links for 'PTS Pro', 'PTS Essential', 'Message Center (8)', and 'Support'. The main content area is titled 'PTS REPORTING' and contains a 'Search Parameters' section. This section includes radio buttons for 'Current Account only', 'Group', and 'Global'. A list of search parameters is shown on the left, including Account, Country, Customer Number, Create Date, Replacement Date, Status, Order Number, Mfg Part, Customer Part, BOM Part, PO Number, Equipment, Competitor Name, Competitor Part, Competitor Part Type, VIN/Serial Number, and QC Code. The 'Account' field is populated with 'WICKLIFFE'. The 'From' and 'To' date fields are also populated. A 'Free Text' field is present with a 'Search' button. A 'Release' button is also visible. A calendar for December 2015 is open, showing the date '30' selected. At the bottom of the search form, there are 'Clear All Fields' and 'Search' buttons. The text 'No results' is displayed below the search form. The footer of the page contains copyright information for Parker Hannifin Corp 2013 and the slogan 'ENGINEERING YOUR SUCCESS.'

## 4: Download Update Template

For Mass Management select the 'Download Update Template. For additional instruction please refer to the Mass Management documentation.

### PTS REPORTING

#### Search Parameters

Current Account only
  Group
  Global

**Account**

**Country**

**Customer Number**

**Create Date** From  To

**Replacement Date** From  To

**Replacement Reason**

**Status**

**Product Type**

**Order Number**  **Release**

**Mfgr Part**

**Customer Part**

**BOM Part**

**PO Number**

**Equipment**

**Alt Name**

**Alt Part**

**Alt Part Type**

**VIN/Serial Number**

**QC Code**

**Total Matched Records: 744**

1 2 3 4 5 6 7 8 9 10 ...						
PTS ID	Create Date	Replaced Date	Age	Mfgr Part	Account	
HRR6NE4D	6/24/2016		3		WICKLIFFE	

## 5: Import Updates

Navigate to the **'Import'** screen from the PTS toolbar. Select the **'Update Template'** radio dial, click **'Choose File'** to locate the saved excel template then select **'Upload.'**

When a successful upload has completed a **green** message will appear confirming the changes.

