



Parker Tracking System

PTS Pro: Creating Service Event Templates

Fast. Easy. Accurate.

Release 7.16 | Version 1

Parker Hannifin Corporation

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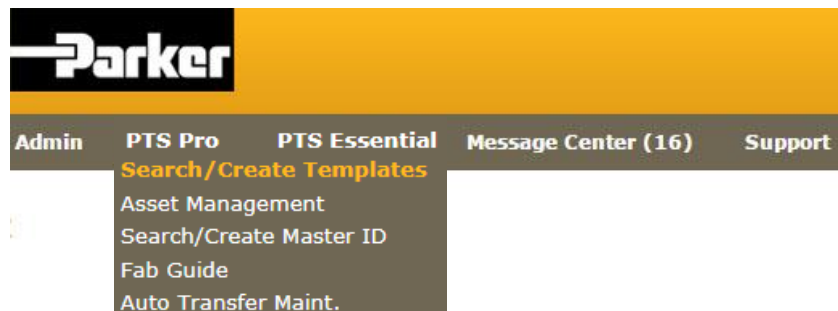
Creating Service Event Templates

Notice:

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.

1: Navigation

Begin by signing in as the Site Administrator account and *clicking* the link titled **'Search/Create Templates'**. Admin accounts will be the only users able to customize a service event template.



2: Add Entry

From the 'Search/Create Template' screen, *click* the [Create Template](#) button to create a new service event template.

Search/Create Template

-- Select Product --
-- Select Type --

[Create Template](#)

Short Description	Long Description	Product	Type		
Test Insp.	Test Insp.	HOSE	Inspection		
Hose Inspection2	Hose Inspection2	HOSE	Inspection		
Standard Hose	Standard Hose		Inspection		
Hose	Hose	HOSE	Inspection		
Canada	Canada		Inspection		
Pro Certification	Pro Certification Course Inspection		Inspection		
Shang1	Shang1	HOSE	Inspection		
Test	Test		Inspection		

3: Create Item(s)

Type a '**Short Description**' in the space provided. This description will be used to apply this inspection template to records.

Specify a '**Long Description**' in the space provided if additional detail concerning the template is required.

Using the **Product** dropdown menu, *select* the type of product that the service event items should be associated to within PTS.

Using the **Type** dropdown menu, *select* the type of service event that will be performed.

Search/Create Template

Short Description	<input type="text" value="Machine Maintenance"/>
Long Description	<input type="text" value="Machine Maintenance"/>
Product	<input type="text" value="MACHINE/TOOLS"/>
Type	<input type="text" value="Preventative Maintenance"/>

Cancel

Next

4: Select Criteria

Select the desired criteria for the customized service event template by *clicking* the check boxes to the left of the line item.

Search/Create Template

	Short Description	Long Description	Product	Type
<input type="checkbox"/>	Verify M/c PWR Plug	Verify presence of Machine Power Plug	MACHINE/TOOLS	Radio
<input type="checkbox"/>	Verify QR Code	Verify presence of QR Code for Manuals	MACHINE/TOOLS	Radio
<input type="checkbox"/>	Verify Sticker qty	Verify presence and quality of Stickers	MACHINE/TOOLS	Radio
<input type="checkbox"/>	Electrical tube stop	Check electrical tube stop	MACHINE/TOOLS	Radio
<input type="checkbox"/>	Mark screws end stop	Mark screws of end stop with sealing wax	MACHINE/TOOLS	Radio
<input type="checkbox"/>	Safety flap function	Check function of safety flap	MACHINE/TOOLS	Radio
<input type="checkbox"/>	Lubrication impulse	Check lubrication impulse	MACHINE/TOOLS	Radio
<input type="checkbox"/>	M/C Condition check	Regular condition check of machine-oil leakage, visible damages, switches, pipes and cables, emergency stop, etc	MACHINE/TOOLS	Radio
<input type="checkbox"/>	oil level tool	Check oil level of tool lubrication	MACHINE/TOOLS	Radio
<input type="checkbox"/>	Fluid level hyd tank	Check fluid level of the hydraulic tank	MACHINE/TOOLS	Radio
<input type="checkbox"/>	Tumbling lubrication	Check tumbling lubrication (hose must be filled)	MACHINE/TOOLS	Radio
<input type="checkbox"/>	Flanging stroke unit	Check flanging stroke of the unit	MACHINE/TOOLS	Radio
<input type="checkbox"/>	Pressure relief valv	Check operating pressure of pressure relief valve	MACHINE/TOOLS	Radio
<input type="checkbox"/>	Tumbling amplitude	Check tumbling unit amplitude	MACHINE/TOOLS	Radio
<input type="checkbox"/>	Dimension of jaws	Check the gap dimension of the prestressed jaws	MACHINE/TOOLS	Radio
<input type="checkbox"/>	Assembly 16X2	Carry out an assembly 16X2	MACHINE/TOOLS	Radio
<input type="checkbox"/>	Check oil filter	Check oil filter	MACHINE/TOOLS	Radio
<input type="checkbox"/>	Tube stop	Check the presence of the tube stop	MACHINE/TOOLS	Radio
<input type="checkbox"/>	Lubrication unit	Check lubrication unit	MACHINE/TOOLS	Radio
<input type="checkbox"/>	Assembly EO2FORM	Assembly EO2FORM	MACHINE/TOOLS	CheckBox



Cancel

Done

Once all of the criteria have been selected, *click* **Done** and proceed to the next step.

*If additional criteria is required, contact PTS Customer Service to add items to the list.

5: New Template

The new inspection template should appear in the **'Search/Create Template'** menu. You can edit  or delete  templates as needed.



















Search/Create Template

-- Select Product --

-- Select Type --

Search

Create Template

Short Description	Long Description	Product	Type		
Test Insp.	Test Insp.	HOSE	Inspection		
Hose Inspection2	Hose Inspection2	HOSE	Inspection		
Standard Hose	Standard Hose		Inspection		
Hose	Hose	HOSE	Inspection		
Machine Maintenace	Machine Maintenace	MACHINE/TOOLS	Preventative Maintenance		
Canada	Canada		Inspection		
Pro Certification	Pro Certification Course Inspection		Inspection		
Shang1	Shang1	HOSE	Inspection		
Test	Test		Inspection		

Related Articles

- To apply an inspection template, refer to the ['PTS Pro: Schedule Inspections & Replacements'](#) module
- To apply an inspection template as a default, refer to the ['PTS Pro: Account Settings'](#) module
- To record an inspection, refer to the ['Performing an Inspection'](#) module