



Parker Tracking System

How To Create A Label

General Assets: Dynamic Bill of Material

Fast. Easy. Accurate.

Release 8.16 | Version 1

Parker Hannifin Corporation

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How to Create a Label (General)

1: Configure Label Options

For users that require the need to create general labels with dynamic bill of material the 'General' products selections have been added to PTS.

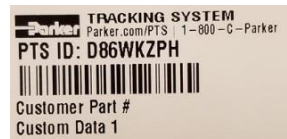
To configure your printer for use of 'General Labels' login as an Administrator and *navigate* to the '**Account Config.**' tab. In the section designated '**General**' add the appropriate printer information to the settings.

There are two different label options;

1. GeneralLabel.lwl – Prints Custom Data Line 1 and Custom Data Line 2
2. GeneralLabel2.lwl – Prints Customer Part # and Custom Data Line 1



GeneralLabel.lwl



GeneralLabel2.lwl

ACCOUNT INFO

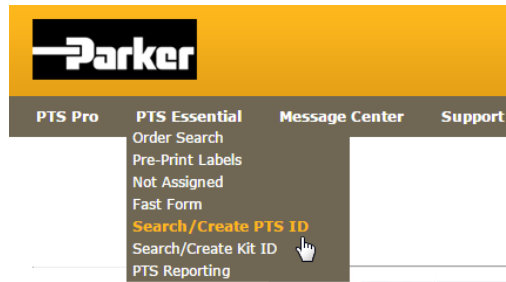
Required Field*

Account Info	Account Config.	User Info	User Config.	PTS Pro	Notifications	User Management
General						
<input type="checkbox"/> Mark Private		<input type="checkbox"/> Admin Lock Records				
Printer 1	<input type="text" value="ABC123-01"/>	Label Format	<input type="text" value="GeneralLabel.lwl"/>			
Printer 2	<input type="text" value="ABC123-02"/>	Label Format	<input type="text" value="GeneralLabel2.lwl"/> +			
Hose						
Print Duplicates	<input checked="" type="checkbox"/> Length (in.) >= <input type="text" value="100"/>	<input type="checkbox"/> Part OD (xx/16 in.) >= <input type="text" value="32"/>				
Printer 1 (4")	<input type="text" value="ABC123-01"/>	Label Format	<input type="text" value="GeneralLabel.lwl"/>			
Printer 2 (8")	<input type="text" value="ABC123-02"/>	Label Format	<input type="text" value="GeneralLabel2.lwl"/> +			
Custom Data Defaults	<input type="text"/>		<input type="text"/>			
Custom Data 1 Override	<input type="text"/>	Prefix 1	<input type="text"/>			
Custom Data 2 Override	<input type="text"/>	Prefix 2	<input type="text"/>			
Custom Data 3 Override	<input type="text"/>	Prefix 3	<input type="text"/>			

Once complete *select*

2: 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  and the following information is displayed. To create a record for an item other than the options listed select **'Other.'**

SEARCH/CREATE PTS ID

Search for PTS ID:

Create New PTS ID
-Select Product-
-Select Product-
ACCUMULATOR
CYLINDER/ACTUATOR
FILTER
HOSE
MOTOR
OTHER
POWER TAKE OFF
PUMP
SEAL
SENSORS/DIAGNOSTICS
TOOLS/EQUIPMENT
VALVE

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. It is a recommended best practice to ensure at least one of these fields is populated.

Search/Create PTS ID

PTS ID

Originator: Parker Hannifin - Hose Products
 Division **i** Registration Date: Service History:
 Product Type: Other Commission Date: Monitored Asset:
 Mfgr Date: Warranty:
 Part Number: Warranty Exp.:
 Serial Number:
 Description: Private

Label Options...
 Print Pre-Printed

Customer Info | Bill of Material | Alt Bill of Material | Application Data | Service/Warranty

Order Source **i**
 Ship as Part #
 Order Number Release
 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

Model #	Used in order interface applications
Part #	Add Part # if applicable
Serial #	Add the product serial number if applicable
Customer Part #	Add the customer part # if application (optional print to label function)
Mfgr Date	Select the calendar widget to add the date the component was manufactured
Registration Date	Select the calendar widget to add the date the component was registered
Commission Date	Select the calendar widget to add the date the component was commissioned into operation
Ship Date	Select the calendar widget to add the date the component was shipped
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
Quantity	Add a numerical value or quantity of each component part number to coincide with Length/UM
Length/UM	Select the Length or Unit of Measure of the components (optional).
QC Code	Add quality information (i.e., specifications)
Comment	Free form text that remains with the record being created. <i>Click</i> on the  to add comments to the record

5: Alt Bill of Material


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

Customer Info	Bill of Material	Alt Bill of Material	Application Data	Service/Warranty
Alt Mfgr Name	<input type="text" value="<none>"/>			
Name	<input type="text"/>			
Part Number #	<input type="text"/>			
Product Line	<input type="text"/>			
Notes	<input type="text"/>			
Identified Date	<input type="text"/> 			
Component Part	Quantity	Length U/M	QCCode	
<input type="text"/>	<input type="text"/>	<input type="text" value="▼"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="▼"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="▼"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="▼"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="▼"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="▼"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="▼"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="▼"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="▼"/>	<input type="text"/>	<input type="text"/>

6: Application Data Screen

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

Designate location data to give a specific location on a piece of equipment. Use **'Location 1'**, **'Location 2'**, **'Equipment'**, and **'VIN/Serial Number'** to specify where an asset will be installed.

Use the drop down menu options to *select* locations from previously added values. To enable free form text, **select** the  edit text icon.



Using the drop down menu options select values to stipulate application data for **'Inlet'** and **'Outlet'** details, **'Media, Media Temp, Environment, Environment Temp, Pressure and Cumulative Runtime'** to outline the system parameters. Use **'Repair'** to specify whether repairs should be completed in the field or in a service facility.



Selecting a criticality will automatically load the default inspection and replacement schedules that have been set in the **'Account Info'** section.

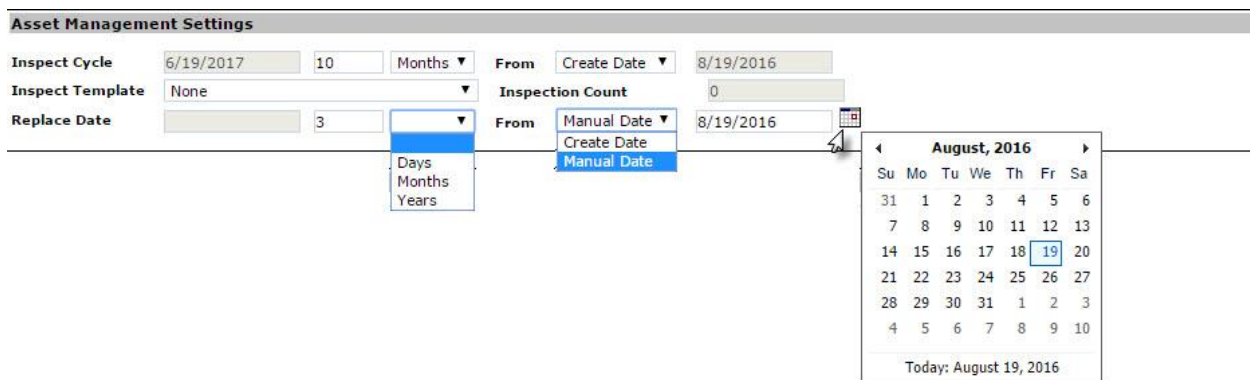


The screenshot shows the 'Application Data' form with various input fields. The 'Criticality' dropdown menu is highlighted with a green circle. Other fields include 'App. Inlet', 'App. Outlet', 'Media', 'Environment', 'Pressure', 'Media Temp.', 'Env. Temp.', 'Cumulative Runtime', and 'Repair' (with 'Shop' and 'Field' radio buttons).

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.

Users that do not have settings configured in Account Info may manually adjust Asset Management Settings. Manually add numerical values to text boxes and use the drop down menu to select Days, Months and Years. Users can change the dates using a calendar widget for Inspect Cycle and Replace Date by selecting Manual Date from the drop down menu.

It is a recommended best practice to utilize the inspection information and replacement values for greater data integrity.





The screenshot shows the 'Asset Management Settings' form. The 'Inspect Cycle' is set to 6/19/2017, 10 Months. The 'Inspect Template' is None. The 'Replace Date' is set to 3, and the 'From' dropdown is open, showing 'Manual Date' selected. A calendar widget is displayed for August 2016, with the date 19 highlighted. The 'From' dropdown for 'Inspect Cycle' is also open, showing 'Manual Date' selected.

August, 2016						
Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10


Today: August 19, 2016

Depending upon the type of product that is selected ‘**Application Elements**’ will be available for use. If additional values are required and are not listed, please contact the PTS support team.

Use the expand  and collapse  icons to open and close the ‘Application Elements.’ Selections may be in available as free form text or pre-populate drop down values.

<input checked="" type="checkbox"/> BALS Application Elements			
<input checked="" type="checkbox"/> FILTER Application Elements			
Element	Value	Element	Value
Additional Detail	<input type="text"/>	Efficiency	<input type="text"/>
Diameter	<input type="text"/>	Flow Rate	<input type="text"/>
Elemental Material	<input type="text"/>	Dew Point	<input type="text"/>
Connection	<input type="text"/>	Material	<input type="text"/>
<input checked="" type="checkbox"/> HOSE Application Elements			

Attach a file to a record by using the Attachments section. Click to locate a file and to add it to the record. Once a file has been successfully added to the record users will be notified in the application with a note stating, “File uploaded successfully.”

Attachments				
Attachment	<input type="button" value="Choose File"/> No file chosen			<input type="button" value="Upload"/>
File uploaded successfully. File Name Desert.jpg File Size 845941 bytes Content Type image/jpeg				
File Name	Date	Size	Privacy	
Desert.jpg	8/19/2016	826 KB	<input type="radio"/> Public <input checked="" type="radio"/> Private	

There are two privacy functions for attachments, public and private. The originator of the record will determine the privacy settings for attachments. Originators can upload, view, download and delete attachments.

Public:

- Allows standard users to view and download attachments.

Private:

- Restricts visibility, upload, download and deletion to the originator and group level users.
- Provides view and upload functionality to Affiliates.

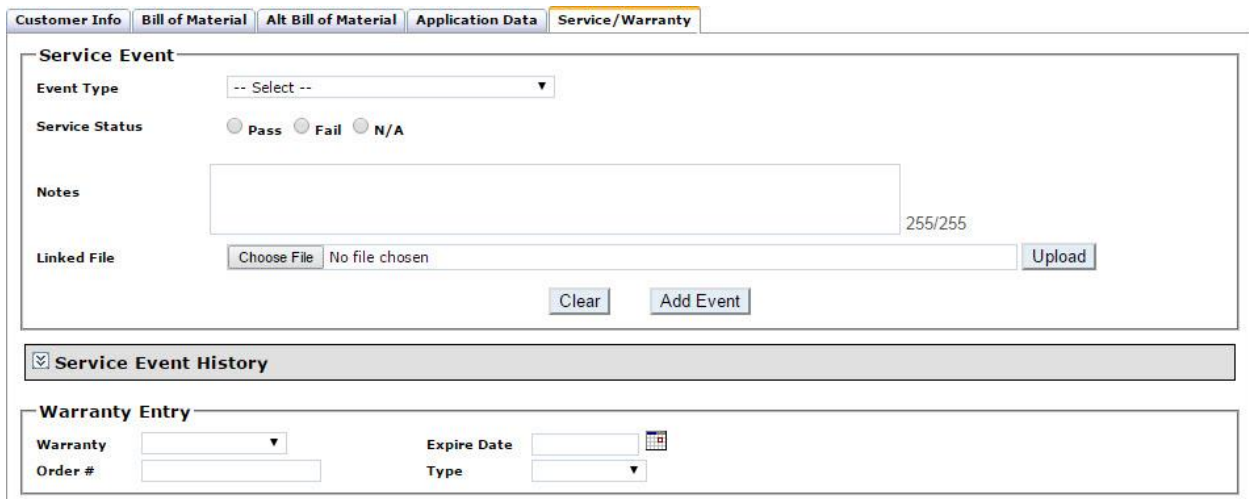
7: Service/Warranty

The Service/Warranty section is a useful resource to track service events and warranty information. Using the drop down menu select the appropriate event type from the pre-populated list of options.

Select a 'service status' and add any notes for the event. Users may add attachments for future reference or to document the event. To clear the information from the events, select **'Clear.'**

It is important to select **'Add Event'** to save the work performed.

To add Warranty information, use the options available using the drop down selector, date widget or free text fields



The screenshot shows a web application interface with a navigation bar at the top containing tabs: Customer Info, Bill of Material, Alt Bill of Material, Application Data, and Service/Warranty. The 'Service/Warranty' tab is active. Below the navigation bar is a form titled 'Service Event' with the following fields:

- Event Type:** A dropdown menu with the text '-- Select --'.
- Service Status:** Three radio buttons labeled 'Pass', 'Fail', and 'N/A'.
- Notes:** A large text area with a character count '255/255' on the right side.
- Linked File:** A file upload field with a 'Choose File' button, the text 'No file chosen', and an 'Upload' button.
- At the bottom of the 'Service Event' section are two buttons: 'Clear' and 'Add Event'.

Below the 'Service Event' section is a grey bar with a checkmark icon and the text 'Service Event History'. Below that is a section titled 'Warranty Entry' with the following fields:

- Warranty:** A dropdown menu.
- Order #:** A text input field.
- Expire Date:** A date picker widget.
- Type:** A dropdown menu.

8: Create Record

PTS ID

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

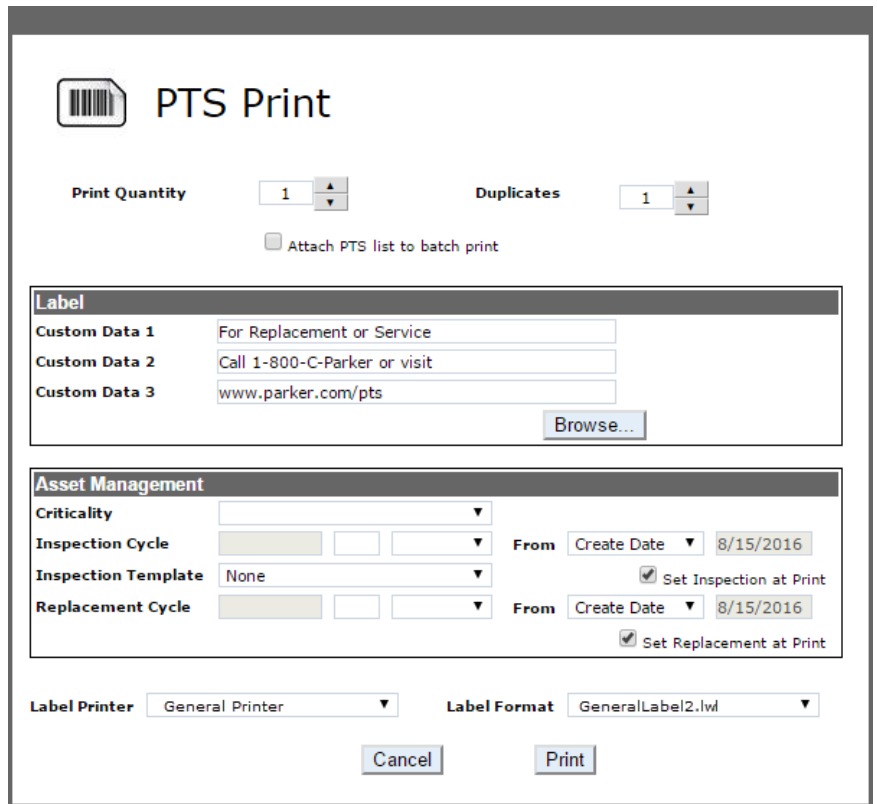
9: PTS Print Screen

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

Change the '**Duplicates**' quantity to print identical tags with the same 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.

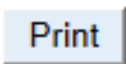
Asset Management functionality is available for users that have access to PTS Pro. To learn more about the functionality of Pro, or to enroll, please contact your Parker PTS representative.



The screenshot shows the 'PTS Print' interface. At the top, there is a barcode icon and the title 'PTS Print'. Below this, there are two spinners for 'Print Quantity' and 'Duplicates', both set to '1'. A checkbox labeled 'Attach PTS list to batch print' is present and unchecked. The 'Label' section contains three text input fields for 'Custom Data 1' (containing 'For Replacement or Service'), 'Custom Data 2' (containing 'Call 1-800-C-Parker or visit'), and 'Custom Data 3' (containing 'www.parker.com/pts'), with a 'Browse...' button to the right. The 'Asset Management' section includes dropdown menus for 'Criticality', 'Inspection Cycle', and 'Replacement Cycle'. It also features 'From' date pickers for 'Inspection Cycle' and 'Replacement Cycle', both set to '8/15/2016'. Checkboxes for 'Set Inspection at Print' and 'Set Replacement at Print' are checked. At the bottom, there are dropdown menus for 'Label Printer' (set to 'General Printer') and 'Label Format' (set to 'GeneralLabel2.lwl'). 'Cancel' and 'Print' buttons are located at the bottom center.

'**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.