Parker Tracking System

File Transfer Interface

Fast. Easy. Accurate.

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Adding Attachments to PTS via File Transfer

Digital documents and files can be transferred to PTS and attached to the appropriate PTS record using the PTS File Transfer Interface.

Important Note: Attachment Viewing Privileges

Files uploaded to PTS can be designated Public or Private. Public attachments are made available to any registered PTS user, including mobile users. Private attachments can be viewed only by the record originator or any account with whom the originator affiliates. All files are assumed to be private unless indicated as public in the file name or when marked "Public" in the PTS web interface. Please refer to the file naming convention for PTS FTP transfer.

There are two supported methods of transferring files to a PTS record:

Method 1: PTS Web-based Interface

Currently the PTS web-based interface can attach documents to either a single PTS record from within the record itself or to multiple records using the Maintain feature in PTS Pro→Asset Management. Please refer to the "Managing Attachments" and "Asset Integrity Management" documents in the Parker PTS Documentation site for details. Both are accessible through the Support→Support Center link on the PTS Web menu bar.

Method 2: FTP File Transfer

Automated file transfer to PTS is available through FTP (File Transfer Protocol). Files transferred using FTP are attached to a specific PTS ID via a scheduled service and are viewable within 10 minutes.

Setup

- FTP permissions are division-specific
- A service account will be created for the automated transfer processes and credentials provided upon request
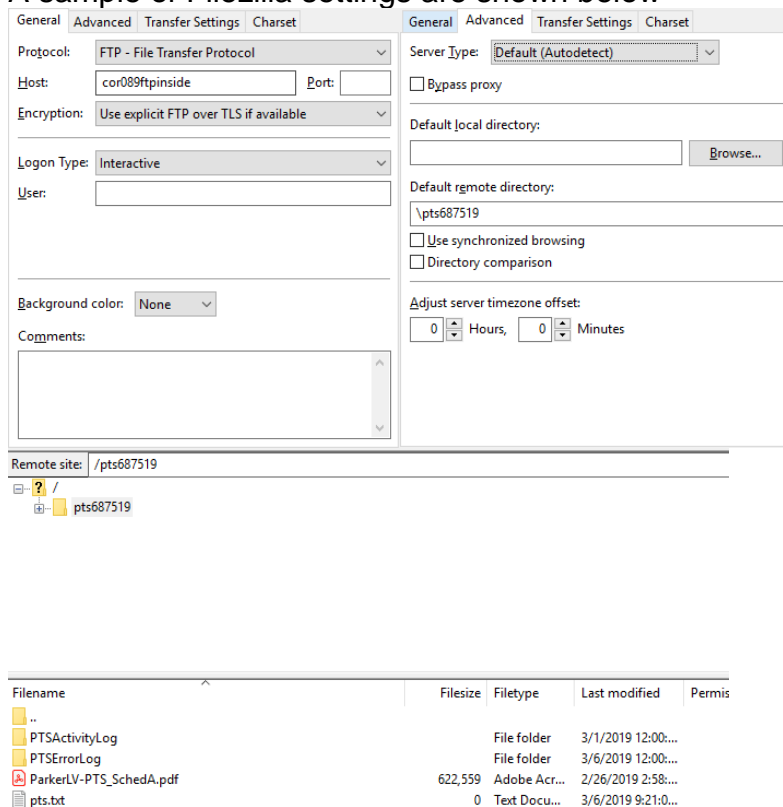
Connection Options:

- FTP Inside via command prompt or mainframe (example below)

```
Command Prompt - ftp                                          —    □    ×

Microsoft Windows [Version 10.0.16299.847]
(c) 2017 Microsoft Corporation. All rights reserved.

H:\>ftp
ftp> open
To cor089ftpinside
Connected to cor089ftpinside.us.parker.corp.
220 Microsoft FTP Service
200 OPTS UTF8 command successful - UTF8 encoding now ON.
User (cor089ftpinside.us.parker.corp:(none)): USPHC\COR089FTPPTS687519
331 Password required for USPHC\COR089FTPPTS687519.
Password:
230 User logged in.
ftp> cd pts687519
250 CWD command successful.
ftp> put
Local file c:\pts.txt
Remote file
200 PORT command successful.
125 Data connection already open; Transfer starting.
226 Transfer complete.
ftp>
```

- FTP Third-Party Software
  - Examples include <u>Filezilla</u> (free & preferred) and <u>WS_FTP</u>
  - A sample of Filezilla settings are shown below

- Directly connect a document management system (ex. LabVantage) using your FTP credentials

File Types

File types permitted for PTS FTP transfer are:

- Image Files (.jpeg, .gif, .tif, .png)
- Office Documents (.xls, xslx, .doc, .docx, .ppt, .pptx)
- Adobe Acrobat files (.pdf)
- Movie Files (.mov, .mp4, .avi, .wmv, .png)
- Common Type files (.txt, .csv)

File Limits

- Maximum file size allowed is 25MB
- Duplicate file names may be uploaded to a single record but an underscore and number will be appended (ex. DuplicateDocument_1.doc)
- There is no set limit to the number of files that may be attached to a record but for ease of use, we recommend no more than 25
- The quantity and relative size of the attachments will have a direct effect on that record's performance in the PTS Mobile app

Prerequisites

In order for files to be attached to a specific PTS record, all of the following prerequisites must be met:

1. The PTS record must be created before the file is transferred as the PTSID is required for the attachment to be linked properly
2. The file must be transferred to the correct PTS FTP folder
3. The file name must follow the PTS file naming convention

File Naming Conventions

Create the file name using these examples. Separate the segments using underscores(_). File names should not contain any other underscores. Use ALL CAPS for segments 2 and 4.

To attach documents to the PTS Test environment, add a prefix of **TEST_** to the filename.

Attach to:	SEGMENT 1: Your PTS Account Number	SEGMENT 2: Product Type or Document Type	SEGMENT 3: Document Identifier	SEGMENT 4: Access: (Public / Private)	SEGMENT 5: Document name and extension	Example *Italics = your information*
A specific PTS ID	*AccountNumber*	PTSID	*PTSID #*	PUBLIC or PRIVATE		*AccountNumber*_PTSID_*XY98Z489_*PUBLIC_*document.ext*
Example:	123456	PTSID	PDQ857D9	PUBLIC	Document.pdf	123456_PTSID_PDQ857D9_PUBLIC_Document.pdf

Attachment to PTS Record

- Files transferred using PTS FTP are attached to the PTS record using a 5 minute scheduled agent.
- It is the user's responsibility to check that files are attached to the correct record during initial setup. For issues with file transfer and attachments, contact PTS Customer Service.
- The FTP site is monitored by PTS Customer Service, however, files that could not be attached to the PTS record will be deleted from the FTP site after 30 days. Unresolved file transfer issues communicated by PTS Customer Service may result in deletion of those files.

Transferring to the PTS FTP Site

- Check with your IT department for specific company requirements for file transfer.
- Any approved FTP client can be used to transfer files to the PTS FTP site. Filezilla is recommended.
- Files to be transferred should always be backed up prior to transfer and kept according to your retention policy.

ℹ️ Getting Started

- Submit an email request to PTS Customer Service (support@parkertracking.atlassian.net) for FTP site access to get started. List the user who will be the responsible party. The requests are approved by Parker Corporate and could take up to one week to process.
- Credentials for file transfer (server destination address, user name, and password) will be supplied after the request is approved. These credentials are required to connect to the destination folder.
- For automated processes that create files but are not capable of transmitting by FTP, an interim destination folder on the account file server should be created to hold files that are to be transferred using an FTP client. Create the repository from which the files will be transferred. For manual transfer using an FTP client, files can be transferred from any file server or client computer location.
- Install the client and test the connection to the PTS FTP site using the appropriate credentials.
- Contact PTS Customer Service (support@parkertracking.atlassian.net) to run a test scenario.
- After successful testing, the account is ready for production.

Spare Parts & Accessories Upload

- The File Transfer Interface process can also be used to upload a list of Spare Parts and Accessories (SP&A) information to PTS.
- This information is stored per account and part number in PTS so that all records matching that part number in your account will reference the list.
- SP&A information will display in the asset details view on the PTS Mobile app for customer reference (see example below).
- To initiate the upload, first populate data on the SparePartsAndAccessoriesUpload.xlsx document located in the [Templates list on our PTS Support Site](#) (field descriptions below).
- To attach documents to the PTS Test environment, add a prefix of **TEST_** to the filename.
- Then, use the FTI process outlined above to place the document in your account's FTP folder.
- PTS will identify the upload template and automatically update your SP&A information within 1 hour.
- To verify the upload was successful, in the PTS Mobile app, search for a PTS ID that contains a matching Base Part Number and confirm that the SP&A information displays correctly.
- If an SP&A entry matching a Base Part Number is already listed in PTS, uploading it again will update the entry.

Field name	Description
Account(s)	The PTS account number(s), separated by a comma, that will be associated with the Spare Part or Accessory. Only PTS records associated with the listed accounts will link to SP&A information
Base Part Number	The product's base part number
Part Number	The SP&A part number that you'd like to associate with that product
Qty	Recommended quantity
U/M	Unit of Measure for the recommended quantity
Price	Purchase price of the SP&A item
Part Type	Either "Spare Part" or "Accessory"
Short Description	Up to 250 character description of the SP&A item
Long Description	Up to 4000 character description of the SP&A item
Visible Level	PUBLIC will display the SP&A item to all PTS accounts accessing a PTS ID containing the Base Part Number, PRIVATE will hide the SP&A item from all PTS accounts, except the accounts listed

Example PTS Record in the Mobile App: