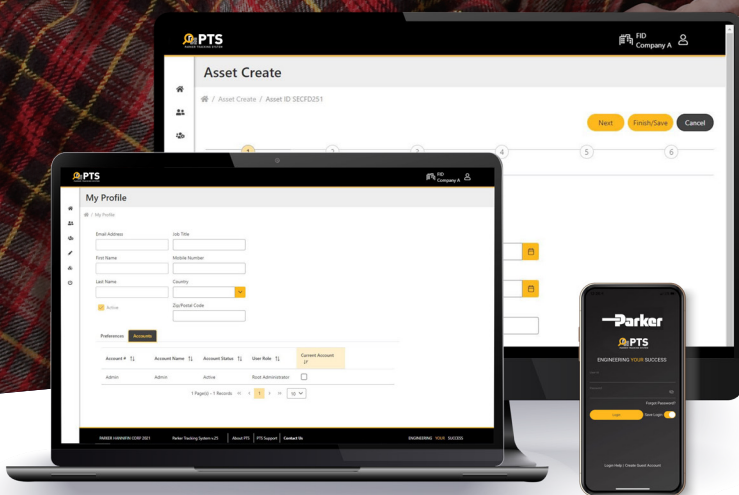


ASSET TAGGING AND MANAGEMENT SOLUTION



Parker Tracking System

Customer Quick Reference Guide Desktop

Ver. 10/27/22



ENGINEERING YOUR SUCCESS.

Parker Tracking System (PTS) Customer Quick Reference Guide

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Parker Tracking System (PTS)

Parker Tracking System (PTS) is an asset tagging and management solution developed, hosted and supported by Parker Hannifin. PTS can be used to tag and manage Parker and Non-Parker parts. This guide was created for authors and owners of PTS enabled products to use as a reference.

Create an Account

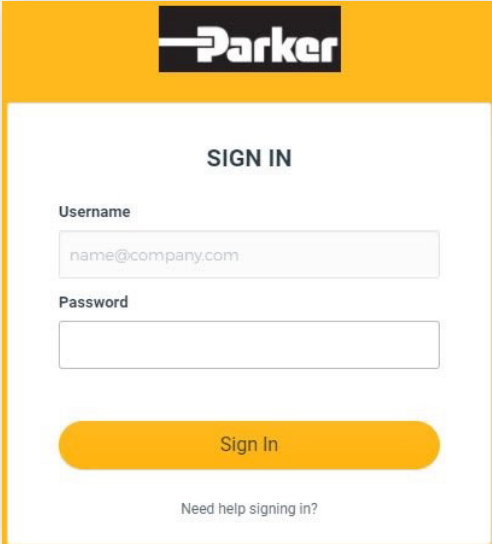
CUSTOMER/DISTRIBUTOR

For enterprise users seeking record access and asset management capabilities, fill out PTS Account Request form at Solutions.Parker.com/PTS-Account-Request

Login

TO SIGN INTO PTS ON THE WEB:

- At the sign in screen, enter your email address and password.

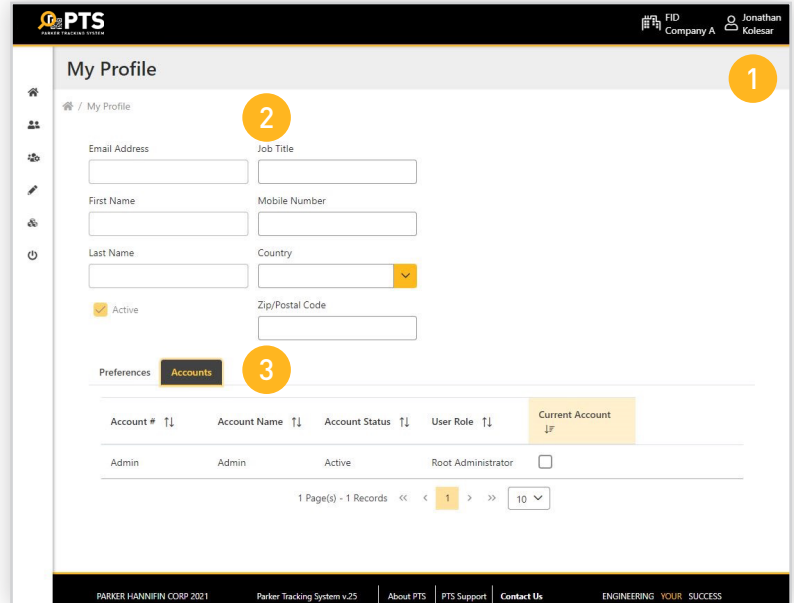


The screenshot shows the Parker PTS Sign In web form. At the top, there is a yellow header with the Parker logo. Below the header, the text "SIGN IN" is centered. The form contains two input fields: "Username" with the placeholder text "name@company.com" and "Password". Below the input fields is a yellow "Sign In" button. At the bottom of the form, there is a link that says "Need help signing in?"

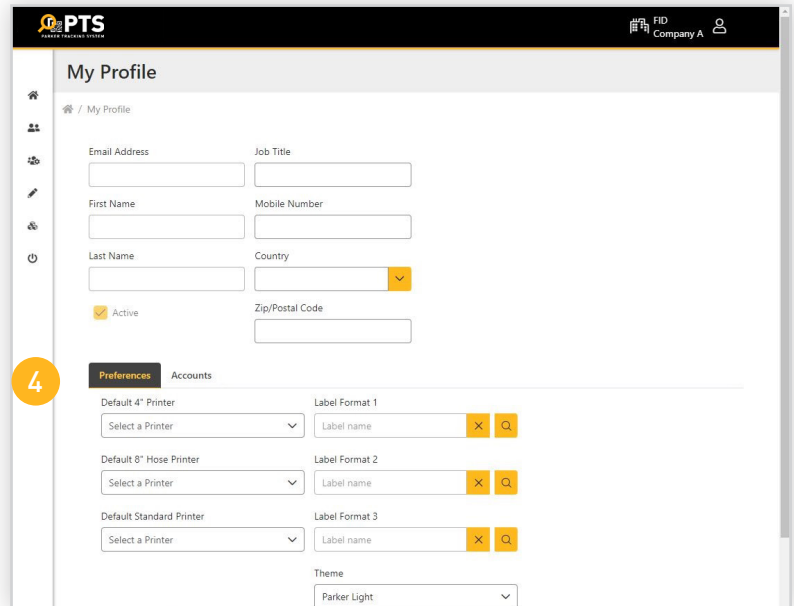
PTS Quick Reference Guide

My Profile

1. Open “My Profile” by selecting your name in the upper right
2. Add or edit your personal information in this section
3. Selecting the “Accounts” tab will display details for your account(s)



4. You can add/edit your personal printer and theme preferences by selecting the “Preferences” tab.



Home Screen Functions

Assets

Assets

Create Asset

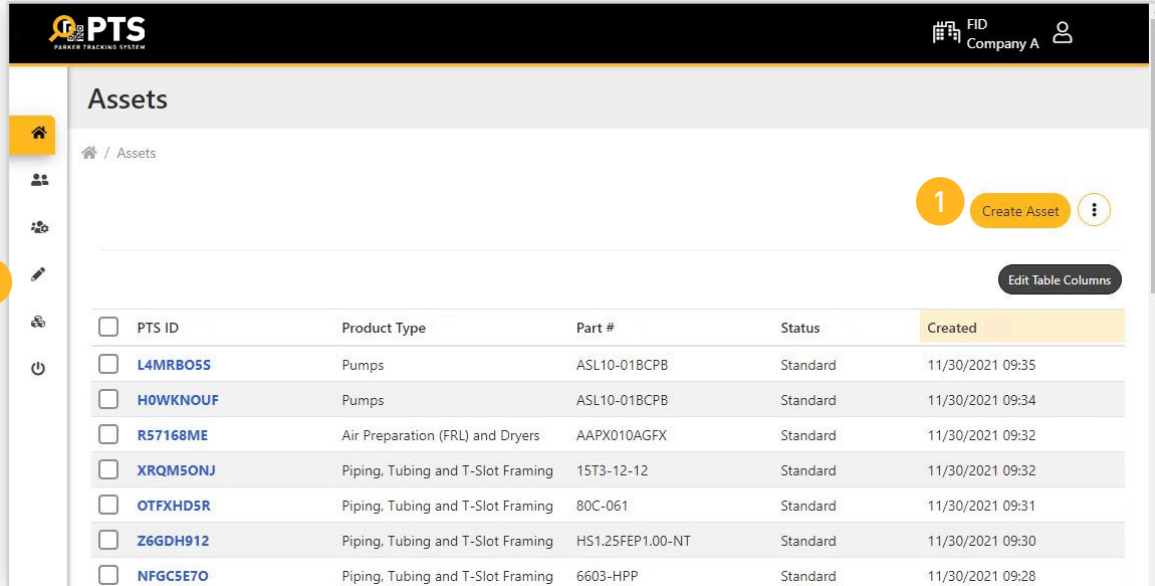
Edit Table Columns

<input type="checkbox"/>	PTS ID	Product Type	Part #	Status	Created
<input type="checkbox"/>	L4MRBO55	Pumps	ASL10-01BCPB	Standard	11/30/2021 09:35
<input type="checkbox"/>	H0WKNOUF	Pumps	ASL10-01BCPB	Standard	11/30/2021 09:34
<input type="checkbox"/>	R57168ME	Air Preparation (FRL) and Dryers	AAPX010AGFX	Standard	11/30/2021 09:32
<input type="checkbox"/>	XRQM50NJ	Piping, Tubing and T-Slot Framing	15T3-12-12	Standard	11/30/2021 09:32
<input type="checkbox"/>	OTFXHD5R	Piping, Tubing and T-Slot Framing	80C-061	Standard	11/30/2021 09:31
<input type="checkbox"/>	Z6GDH912	Piping, Tubing and T-Slot Framing	HS1.25FEP1.00-NT	Standard	11/30/2021 09:30
<input type="checkbox"/>	NFGCSE70	Piping, Tubing and T-Slot Framing	6603-HPP	Standard	11/30/2021 09:28

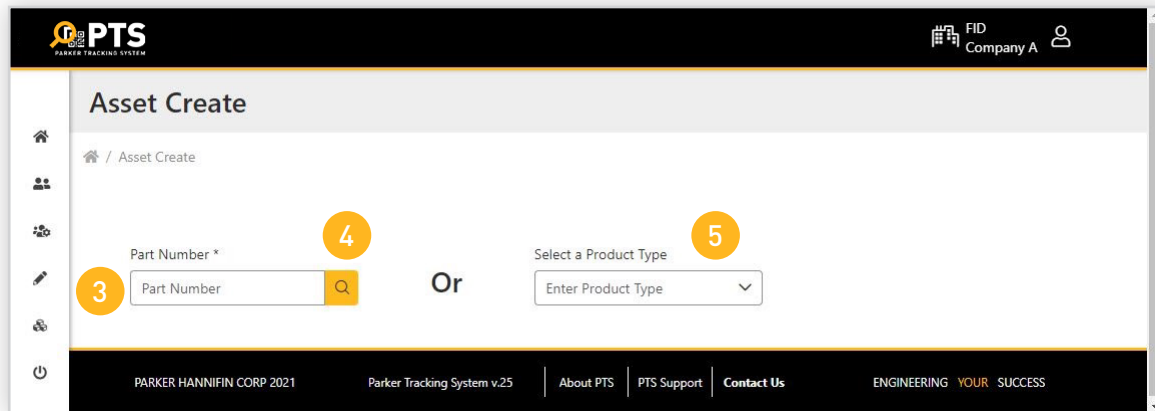
1. System main menu bar
2. List of all assets in your account
3. Filter assets by several column values
4. Edit the column values displayed
5. Create a new asset
6. Access your profile

PTS Quick Reference Guide

Create a New Asset



1. Select the “Create Asset” button or
2. Select the create icon from the left menu bar



3. If the asset base part number is known, type it in the space provided.
4. A partial part number can be entered and searched for.
5. You may also choose a product type

Create a New Asset

Once the part number or product type has been selected, you will be taken to this screen.

1. Notice the product part number, type and brief description will be displayed
2. Select “Create” to continue or “Clear” to start over.

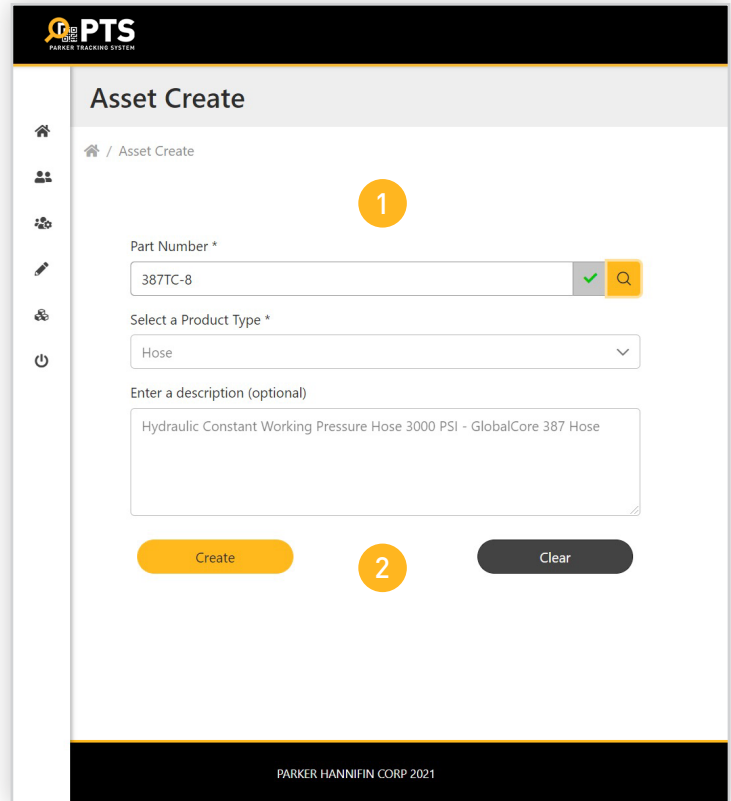


Image for placement only

PTS Quick Reference Guide

Create a New Asset - General Info

The screenshot displays the 'Asset Create' interface in the PTS system. At the top, the PTS logo and 'PARKER TRACKING SYSTEM' are visible on the left, and 'FID Company A' with a user icon is on the right. The main heading is 'Asset Create', and the breadcrumb trail shows '/ Asset Create / Asset ID SECFD251'. A progress bar at the top indicates six steps, with step 1 highlighted. Below the progress bar, the 'General Info' section contains several input fields: 'PTS ID: SECFD251' (highlighted with a '1'), 'Product Type *' (dropdown menu with 'Valves' selected, highlighted with a '2'), 'Manufacture Date' (calendar icon, '07/07/2020', highlighted with a '3'), 'Part Number' (text input '123456', highlighted with a '2'), 'Commission Date' (calendar icon, '10/14/2020', highlighted with a '3'), 'Product Description' (text area with 'Example Valve', highlighted with a '2'), 'Length of Time in Service' (text input '1 Years 1 Months 24 Days', highlighted with a '2'), and 'Originator' (text input 'FID - Company A', highlighted with a '2'). At the bottom right, there are three buttons: 'Next', 'Finish/Save', and 'Cancel'. The 'Next' button is highlighted with a '4'. The footer contains 'PARKER HANNIFIN CORP 2021', 'Parker Tracking System v.25', 'About PTS', 'PTS Support', 'Contact Us', and 'ENGINEERING YOUR SUCCESS'.

1. Your new PTS ID has been created
2. The product type, part number, product description and originator information have been populated
3. Optional: Enter a manufacturing and commission date
4. Select “Next” to continue, “Finish/Save” to stop or “Cancel” to start over

Create a New Asset - Bill of Material

The screenshot shows the 'Asset Create' interface in the PTS (Parker Tracking System) application. The page title is 'Asset Create' and the breadcrumb is '/ Asset Create / Asset ID SECFD251'. The interface includes a navigation bar with 'Back', 'Next', 'Finish/Save', and 'Cancel' buttons. A progress indicator shows six steps, with step 2 highlighted. The 'Bill of Material' section features an 'Add Component' button (callout 1) and a table with the following data:

Part	Quantity	UOM	Length	QC Code
123456	1	PIECES		1234

Below the table is a pagination control showing '1 Page(s) - 1 Records' and a dropdown menu set to '10'. The footer contains 'PARKER HANNIFIN CORP 2021', 'Parker Tracking System v.25', 'About PTS', 'PTS Support', 'Contact Us', and 'ENGINEERING YOUR SUCCESS'.

1. To begin adding components to the asset bill of material, select the “Add Component” button
2. Enter part number, quantity, length, an optional quality control (QC) code and UOM (unit of measure) for each component. For example, select “pieces” for hose fittings or “inches” for hose
3. Select “Back”, “Next”, “Finish/Save” or “Cancel” to proceed

PTS Quick Reference Guide

Create a New Asset - Customer Info

The screenshot shows the 'Asset Create' interface in the PTS (Parker Tracking System) application. The top navigation bar includes the PTS logo and the user's name 'FID Company A'. The main heading is 'Asset Create' with a breadcrumb trail: '/ Asset Create / Asset ID SECFD251'. A progress bar at the top indicates six steps, with step 3 highlighted. A '1' in a yellow circle points to the 'Customer Info' section, and a '2' in a yellow circle points to the 'Next' button. The 'Customer Info' section is divided into three columns: Billing Information, Shipping Information, and Contact Information. Each column contains input fields for various details, with search icons next to the 'Customer Number' and 'Ship to Number' fields. The 'Shipping Information' section includes a checkbox for 'Same as Billing Info'. The 'Contact Information' section includes fields for 'Full Name', 'Phone Number', and 'Email'. The 'Next' button is highlighted in yellow, indicating the next step in the process.

1. Enter customer's billing, shipping and contact information
2. Select "Back", "Next", "Finish/Save" or "Cancel" to proceed

Create a New Asset - Application Data (Location)

The screenshot displays the 'Asset Create' interface for the Parker Tracking System (PTS). The page title is 'Asset Create' and the breadcrumb is '/ Asset Create / Asset ID SECFD251'. The interface includes a progress bar with six steps, where step 4 is highlighted. The 'Application Data' section is active, with 'Location Info' selected. It contains input fields for 'Equipment', 'VIN/Machine Number', 'Make', and 'Model'. An 'Add Location' button is present. Below, a 'Locations' table lists 'Example Location 1' and 'Example Location 2', each with edit and delete icons. Navigation buttons 'Back', 'Next', 'Finish/Save', and 'Cancel' are at the top right. The footer includes 'PARKER HANNIFIN CORP 2021', 'Parker Tracking System v.25', 'About PTS', 'PTS Support', 'Contact Us', and 'ENGINEERING YOUR SUCCESS'.

1. If known, enter information about the type of equipment or machine the asset is physically installed on
2. You may add multiple locations for where the asset is located ex. Injection molding machine #1, plant 4
3. To edit or delete the location, select the icon
4. Select “Back”, “Next”, “Finish/Save” or “Cancel” to proceed

PTS Quick Reference Guide

Create a New Asset - Application Data (Installed Data)

The screenshot displays the 'Asset Create' interface for 'Asset ID SECFD251'. The 'Application Data' section is active, showing fields for Inlet, Outlet, Media, Environment, Pressure, Bend Radius, Cumulative Runtime, and Criticality. A 'Repair' field with 'Shop' and 'Field' options and a 'Reset' button are also present. The 'Next' button is highlighted with a yellow circle and the number 3. The 'Reset' button is highlighted with a yellow circle and the number 2. The 'Installed Data' tab is highlighted with a yellow circle and the number 1.

1. Enter as much information about the application the asset is used in as possible
2. Select “Reset” to clear selections in the Repair field
3. Select “Back”, “Next”, “Finish/Save” or “Cancel” to proceed

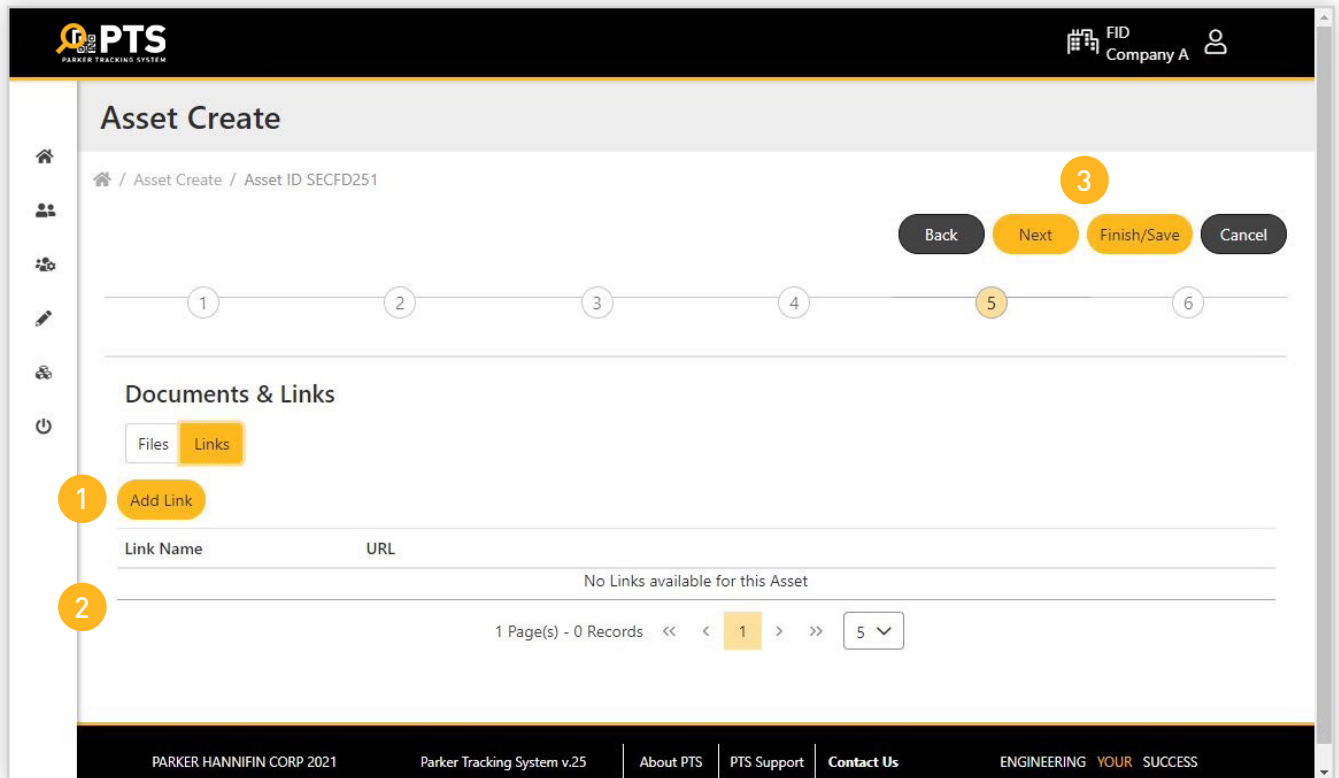
Create a New Asset - Documents & Links (Adding Files)

The screenshot shows the 'Asset Create' page in the PTS system. The page title is 'Asset Create' and the breadcrumb is '/ Asset Create / Asset ID SECFD251'. The top right corner shows 'FID Company A' and a user icon. A progress bar at the top has six steps, with step 4 highlighted. Below the progress bar are buttons for 'Back', 'Next', 'Finish/Save', and 'Cancel'. The 'Documents & Links' section has two tabs: 'Files' (selected) and 'Links'. Under 'File Upload', there are three buttons: '+ Choose Files', 'Upload', and 'Cancel'. Below these is a dashed box labeled '2 Drag and Drop Attachment Here'. At the bottom, there is a table with columns: 'Upload Date (UTC) ↑↓', 'File Name ↑↓', 'File Type ↑↓', and 'File Size ↑↓'. The table content is 'No Documents available for this Asset'. At the bottom of the table, there is a pagination control showing '1 Page(s) - 0 Records' and a dropdown menu set to '25'.

1. To attach files to the asset, select “Choose Files” to browse your computer then select “Upload”. Attachments can include documents, spreadsheets, photos, PDF’s etc.
2. You may also drag and drop attachments in this area
3. Attachment details will show up here
4. Select “Back”, “Next”, “Finish/Save” or “Cancel” to proceed

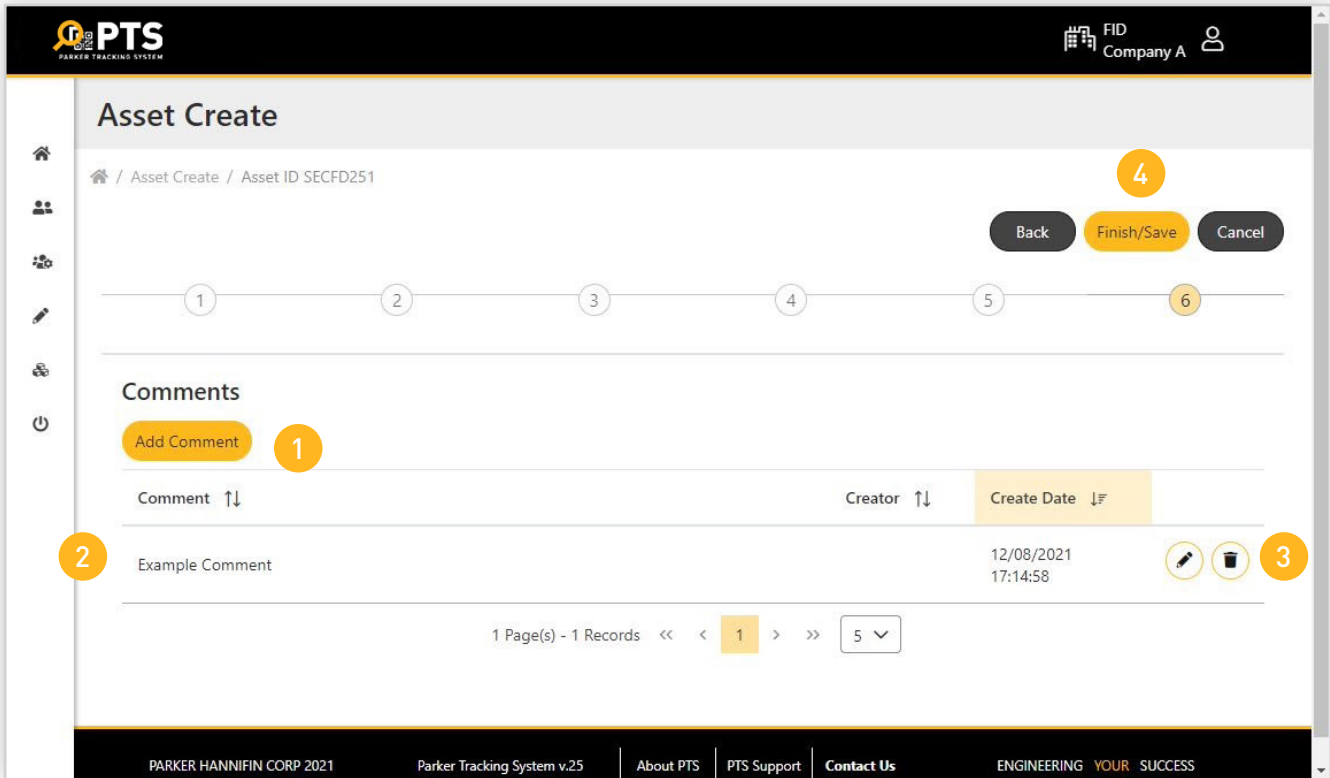
PTS Quick Reference Guide

Create a New Asset - Documents & Links (Adding Links)



1. To attach links to the asset, select “Add Link”. Type or paste the link in the space provided
2. Link details will show up here
3. Select “Back”, “Next”, “Finish/Save” or “Cancel” to proceed

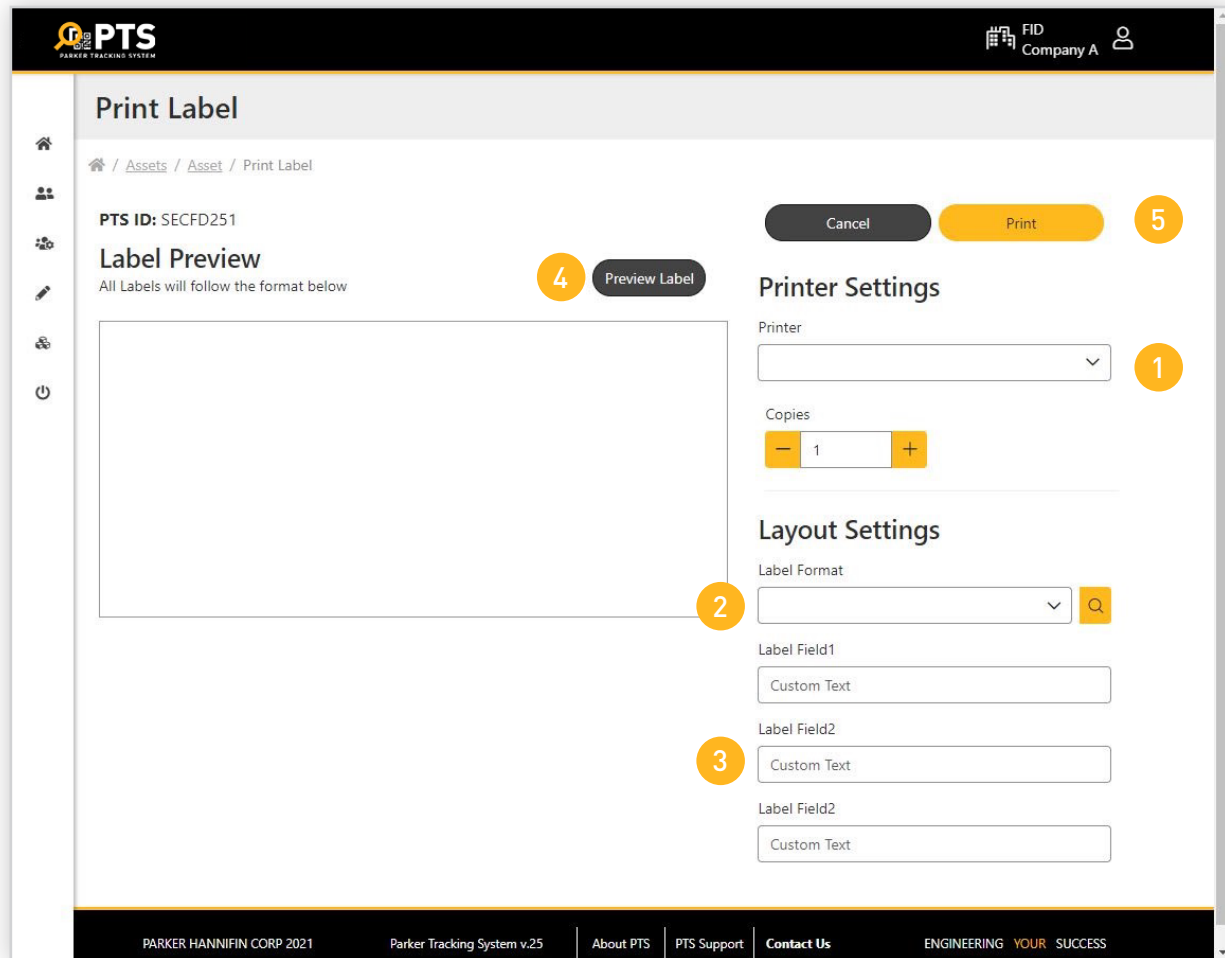
Create a New Asset - Comments



1. Select “Add Comment” to include additional text for the asset
2. Comment details including the creator and date/time will appear here
3. Comments may be edited or deleted by selecting these icons
4. Select “Back”, “Finish/Save” or “Cancel” to complete the create asset process

PTS Quick Reference Guide

Label Printing

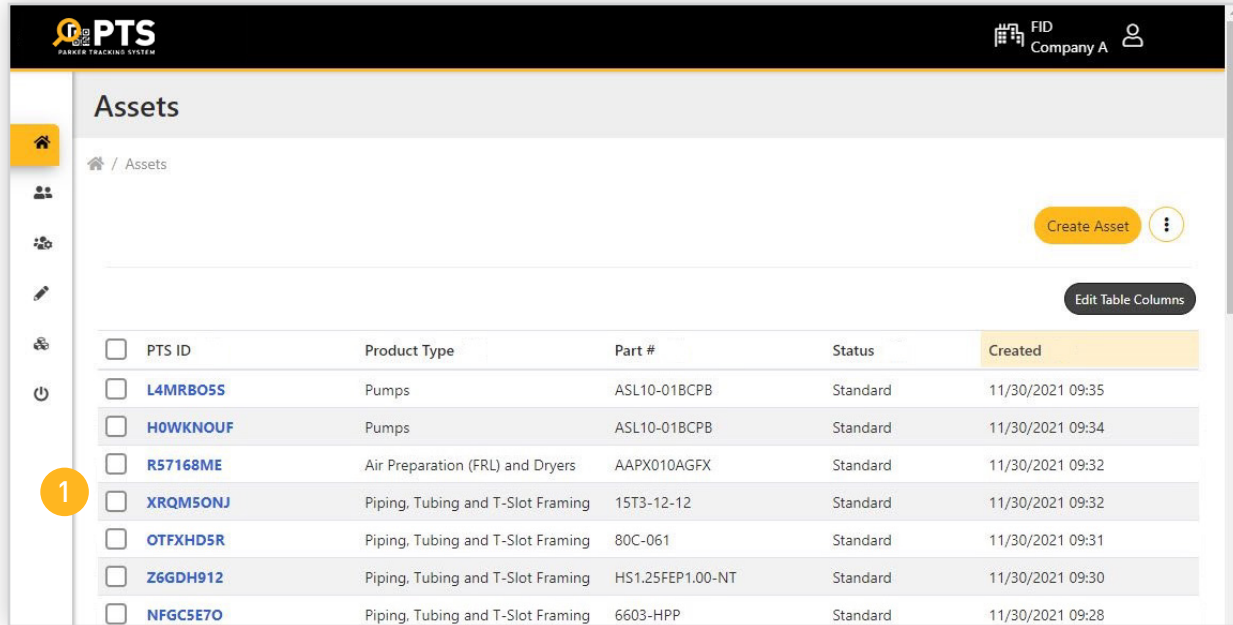


The print function is available within multiple areas of the PTS application.

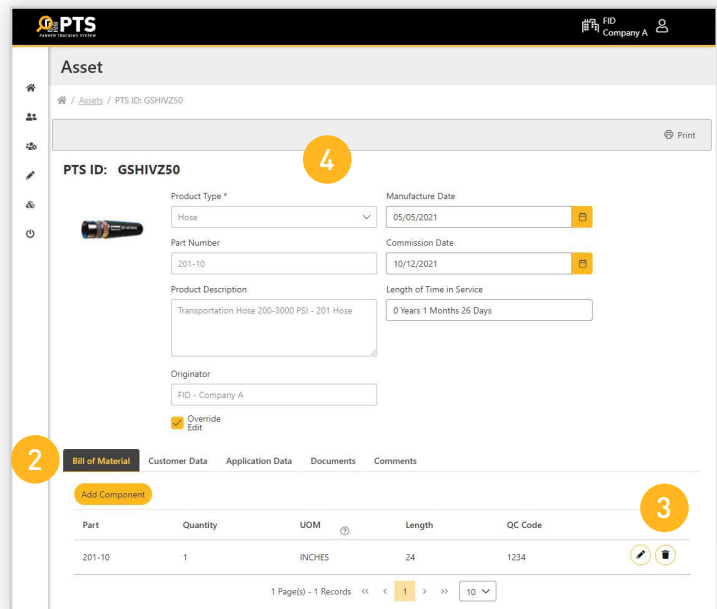
Once print is selected the following screen appears.

1. Select the printer to be used
2. Select the label format
3. Optional: Input three lines of custom text to appear on the physical label
4. Select "Preview Label" button to view what the label will look like
5. When ready, select "Print" to generate the PTS label

Edit an Asset



1. To edit an asset, select it from the list of assets on the home screen
2. From the asset screen, select the information tab you wish to edit
3. Select the edit icon or edit the existing information. When finished select “Save” or “Cancel”
4. Note the product information cannot be edited here.



PTS Quick Reference Guide

Create a Customer

The screenshot shows the PTS (Parker Tracking System) interface for creating a customer. The top navigation bar includes the PTS logo, the user name 'Jonathan Kolesar', and the company name 'Company A'. The main content area is titled 'Customer' and contains a breadcrumb trail '/ Customers / Customer'. On the left, a vertical menu bar has several icons, with the customer icon highlighted by a yellow circle with the number '1'. The form itself has several input fields: 'Customer Number' (with a placeholder 'Customer Number'), 'Customer Name' (with a placeholder 'Full Name'), 'Address1' (with a placeholder 'address1'), 'Address2' (with a placeholder 'address2'), 'Address3' (with a placeholder 'address3'), 'Address4' (with a placeholder 'address4'), 'Country' (a dropdown menu), and 'City' (with a placeholder 'City'). A yellow circle with the number '2' points to the 'Customer Name' field. At the top right of the form, there are two buttons: 'Save' (yellow) and 'Cancel' (dark grey). A yellow circle with the number '3' points to these buttons.

1. Select the customer icon from the left side menu bar
2. Complete as much information about the customer as possible
3. Select “Save” or “Cancel” to finish

Managing the Customer List

The screenshot shows the 'Customers' management page in the PTS system. The interface includes a top navigation bar with the PTS logo and 'FID Company A' user information. A left sidebar contains navigation icons, with a '1' callout pointing to the customer management icon. The main content area has a 'Customers' header and a breadcrumb trail. On the right, there are 'Create Customer' and 'Edit Table Columns' buttons, with a '3' callout pointing to the 'Edit Table Columns' button. Below these is a table with columns: Cust# ↑↓, Name ↑↓, Address1 ↑↓, Location ↑↓, and Country ↑↓. A '2' callout points to the table headers. The table contains two rows: one for 'Customer Test' (Cust# 12346789) and one for 'Customer Test 2' (Cust# 987654321). A '4' callout points to the blue customer number '12346789'. At the bottom of the table, there is a pagination control showing '1 Page(s) - 2 Records' and a dropdown for '15' records per page.

Cust# ↑↓	Name ↑↓	Address1 ↑↓	Location ↑↓	Country ↑↓
12346789	Customer Test	6035 Parkland Blvd	Cleveland, Ohio	United States
987654321	Customer Test 2	987 Any Street	Cleveland, Ohio	United States

1. To edit customer information or add additional customers, select the customer icon from the left menu bar
2. Customer information can be filtered by several columns
3. Select “Edit Table Columns” to modify the columns displayed
4. Select the customer number in blue to open and edit their information. Select “Save” or “Cancel” to finish

PTS Quick Reference Guide - Account Administrators

Adding Users to the Account

The screenshot shows the 'User' creation form in the PTS interface. The form is titled 'User' and is located at the path '/ Users / User'. The form fields are arranged in two columns:

- Column 1:** Email Address (text input), First Name (text input), Last Name (text input), and an 'Inactive' checkbox.
- Column 2:** Job Title (text input), Mobile Number (text input), Country (dropdown menu), and Zip/Postal Code (text input).

Numbered callouts indicate the following steps:

1. Select the 'Users' icon in the left sidebar menu.
2. Complete all areas of the form.
3. Select the 'Create' button to add the user or the 'Cancel' button to quit.

The footer of the page contains the following text: PARKER HANNIFIN CORP 2021 | Parker Tracking System v.25 | About PTS | PTS Support | Contact Us | ENGINEERING YOUR SUCCESS

As a PTS account administrator, you can add additional users.

1. From the admin icon in the left menu bar, select “users”
2. Complete all areas of the form
3. Select “Create” to add user or “Cancel” to quit

Managing the Users List

The screenshot displays the 'Users' management page in the PTS system. The page header includes the PTS logo and 'FID Company A'. The main content area shows a table of users with the following columns: Email, First Name, Last Name, Job Title, and Status. A search bar is located above the table, and a 'Create User' button is in the top right corner. Numbered callouts indicate key features: 1. Admin icon in the left menu bar; 2. Filterable columns (First Name, Last Name); 3. User email in blue text for selection; 4. 'Create User' button.

Email ↑↓	First Name ↑↓	Last Name ↑↓	Job Title ↑↓	Status ↑↓
test3@parker.com	sam	david	SUPERVISOR	Active
test7@parker.com	Kyle	Gerhardstein	Product Sales Manager	Active
test8@parker.com	Melissa	Shrinker	Clerk	Active
test12@parker.com	dakota	smith	test	Active
test11@parker.com	AAA	AAA	Programmer	Active
test13@parker.com	test	user		Active
test17@parker.com	Jane	Doe		Active
test18@parker.com	Jake	FromStateFarm		Active
test31@parker.com	Tom	Adams	Misc	Active
test20@parker.com	Manuel	Hale	Misc	Active

As a PTS account administrator, you can manage/edit the users in the account

1. From the admin icon in the left menu bar, select “users”
2. Users can be filtered by several columns
3. To view or edit a user’s information, select the user email in blue text
4. New users can also be added at this screen

PTS Quick Reference Guide - Account Administrators

Managing the Account List

The screenshot displays the 'Accounts' management page in the PTS system. The page features a table of accounts with the following data:

PTS Account	Name	Type	Status	Location	Country	Date Created
71500-21	TestAccount8	Parker	Active	Atlanta, Massachusetts	United States	8/8/2020
FID123	Fiddler Test POST	Registrant	Active	Euclid, Massachusetts	United States	9/14/2017
TESTTH	Celeste Test	Parker	Active	Test City, Massachusetts	United States	2/1/2018

Callouts in the image indicate the following steps:

1. Select the 'accounts' icon in the left sidebar.
2. Use the filter dropdowns to refine the account list.
3. Click on the account ID (e.g., FID123) in blue text to view or edit details.
4. Click the 'Create Account' button to add a new account.

As a PTS account administrator, you can manage/edit account information

1. From the admin icon in the left menu bar, select “accounts”
2. Accounts can be filtered by several columns
3. To view or edit an account’s information, select the account in blue text
4. New accounts can also be created at this screen

Accounts – General Information

The screenshot shows the 'Account' form in the PTS system. The form is titled 'Account' and has a breadcrumb trail: / Accounts / Account. The form contains the following fields and controls:

- Account Number:** Text input field with value 'FID' and a search icon (1).
- Address1:** Text input field with value '123 Main St.' (2).
- Max Pressure UOM:** Dropdown menu with value 'PSI' and a clear icon (2).
- Account Name:** Text input field with value 'Company A'.
- Address2:** Text input field with value '#1234' (3).
- Measurement System:** Dropdown menu with value 'Imperial' and a clear icon (3).
- Account Type:** Dropdown menu with value 'Parker'.
- Country:** Dropdown menu with value 'United States' and a checkmark for 'Active'.
- Printer Master Folder:** Dropdown menu with value 'Parker' and a clear icon.
- City:** Text input field with value 'Cleveland'.
- Label Master Folder:** Dropdown menu with value 'TestSW' and a clear icon.
- State/Province:** Dropdown menu with value 'Ohio' and a clear icon.
- Zip Code:** Text input field with value 'Zip Code'.

At the top right of the form, there are two buttons: 'Go Back' and 'Deactivate' (4).

Once an account has been selected from the previous screen, the account information will be displayed

1. In this screen, account information can be added or edited
2. Set the account's unit of measure (UOM) for pressure (psi or bar)
3. Set the account's measurement system (Imperial or Metric)
4. Accounts can be deactivated

PTS Quick Reference Guide - Account Administrators

Account Settings – Custom Fields

The screenshot displays the 'Custom Fields' configuration page in the PTS system. At the top, there are three input fields for 'Label Field1', 'Label Field2', and 'Label Field3'. Below these is an 'Add Custom Data' button. A table below lists existing custom fields with columns for 'Customer #', 'Ship To #', 'Cust Part#', 'Label Field1', 'Label Field2', 'Label Field3', and 'Default'. The first row is highlighted, and its 'Default' checkbox is checked. To the right of each row are edit and delete icons. A pagination bar at the bottom shows '1 Page(s) - 5 Records' and a page number '1'.

Customer #	Ship To #	Cust Part#	Label Field1	Label Field2	Label Field3	Default	
			www.company.com	123-456-7890	1234 Man St.	<input checked="" type="checkbox"/>	
99998	ND456		456-T	RET-67	605-4	<input type="checkbox"/>	
				9999-9T		<input type="checkbox"/>	
	12346789		www.companyb.com			<input type="checkbox"/>	
55555			For Service	Contact Us At	123-456-7890	<input type="checkbox"/>	

In this screen you can add three lines of custom text that will print on the PTS label

1. From within the Custom Fields tab, enter up to three custom lines of text
2. Select “Add Custom Data” to save the information
3. To set the label fields as the default, check the box
4. Custom label fields can be edited or deleted by selecting the icons at the right

Account Settings – Printer Setup

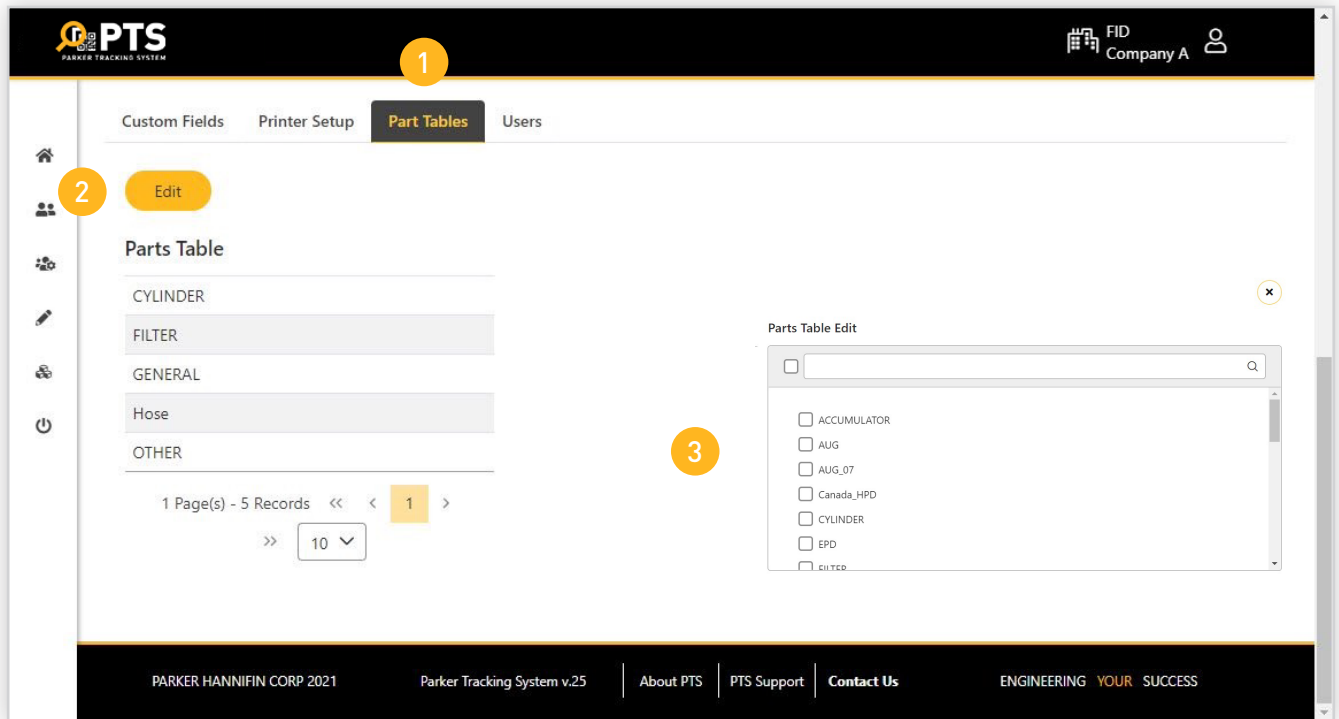
The screenshot shows the 'Printer Setup' tab in the PTS interface. At the top, there are tabs for 'Custom Fields', 'Printer Setup' (highlighted with a '1'), and 'Users'. Below the tabs, there is a section for 'Print Duplicate Copies' with two checked options: 'Length (in.) >=' with a value of 100, and 'Part OD (xx/16in.) >=' with a value of 32. A '5' callout is next to these options. An 'Add Printer' button is highlighted with a '2' callout. Below this is a table of printers with columns: Nickname, Printer Name, Printer Type, Label Name, and Status. The first row shows 'Company A Office Printer', 'Office4InchPrinter', '4 Inch Printer', 'GeneralLabel', and 'Default'. A '4' callout is next to the edit and delete icons for this printer. At the bottom of the table, it says '1 Page(s) - 1 Records' and has a page selector set to '1' out of '5'. The footer contains 'PARKER HANNIFIN CORP 2021', 'Parker Tracking System v.25', 'About PTS', 'PTS Support', 'Contact Us', and 'ENGINEERING YOUR SUCCESS'.

Your company may have one or more label printers. To set up:

1. Select the “Printer Setup” tab
2. Select “Add Printer” and choose the printer to be used
3. If multiple printers are used, they can be filtered in this section
4. Printer information can be edited or deleted by selecting the icons at the right
5. For long hose assemblies, duplicate labels may be printed. Check the box and enter the overall length and inside diameter (ID)

PTS Quick Reference Guide - Account Administrators

Account Settings – Part Tables



Part tables are databases of part numbers that are used in creating a PTS asset in the bill of material section

1. Select the “Part Tables” tab
2. To add or remove a part table select the “Edit” button
3. Select the part table to be added or removed from the list

Account Settings - Users

The screenshot shows the 'Users' management page in the PTS application. The interface includes a top navigation bar with the PTS logo and 'Company A' information. Below the navigation bar are tabs for 'Custom Fields', 'Printer Setup', and 'Users'. A sidebar on the left contains navigation icons. The main content area features an 'Add user' button and a table of users. The table has columns for 'Email', 'First Name', 'Last Name', 'Role', and 'User Role Status'. The 'User Role Status' column contains a checkmark and the word 'Active'. To the right of each row are edit and delete icons. A pagination bar at the bottom indicates '4 Page(s) - 19 Records' and shows page numbers 1 through 5.

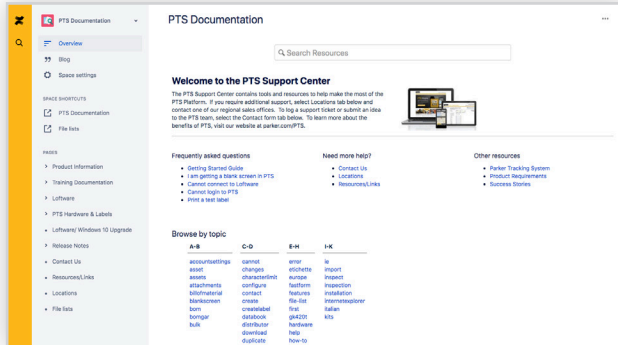
Email	First Name	Last Name	Role	User Role Status	
aaadministrator@company.com	Aa	Administrator	Account Administrator	<input checked="" type="checkbox"/> Active	
aauser1@company.com	Aa	User1	Application User	<input checked="" type="checkbox"/> Active	
aauser2@company.com	Aa	User2	Application User	<input checked="" type="checkbox"/> Active	
aauser3@company.com	Aa	User3	Application User	<input checked="" type="checkbox"/> Active	
aauser4@company.com	Aa	User4	Application User	<input checked="" type="checkbox"/> Active	

As a PTS account administrator, you can manage/edit user information

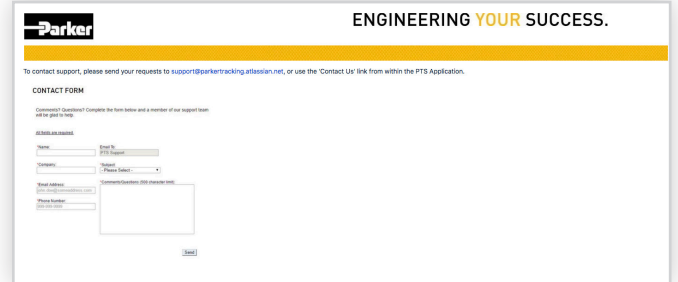
1. Select the “Users” tab
2. Users can be filtered by several columns
3. Select “Add user” to add someone new to the account
4. A user’s status can be edited by selecting or de-selecting the check box
5. A user’s information can be edited or deleted by selecting the icons at the right

Support

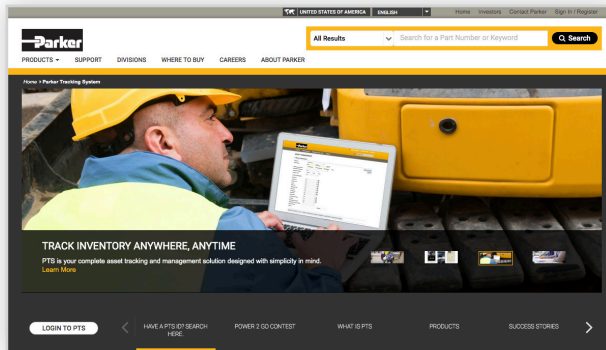
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