



# USER GUIDE

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**A step-by-step guide to getting started,  
viewing material status & updates and  
managing projects.**

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Created By

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Last Updated  
February 16, 2022

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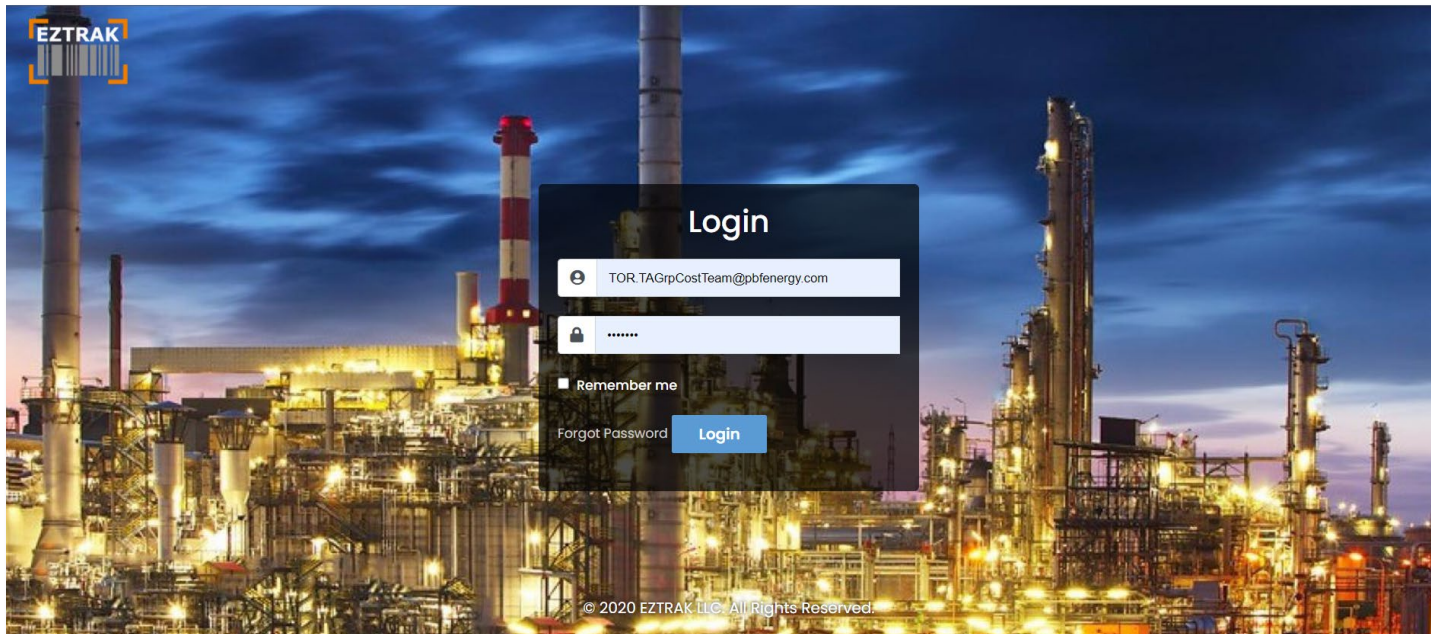
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## 1. EZTRAK ACCOUNT ACCESS

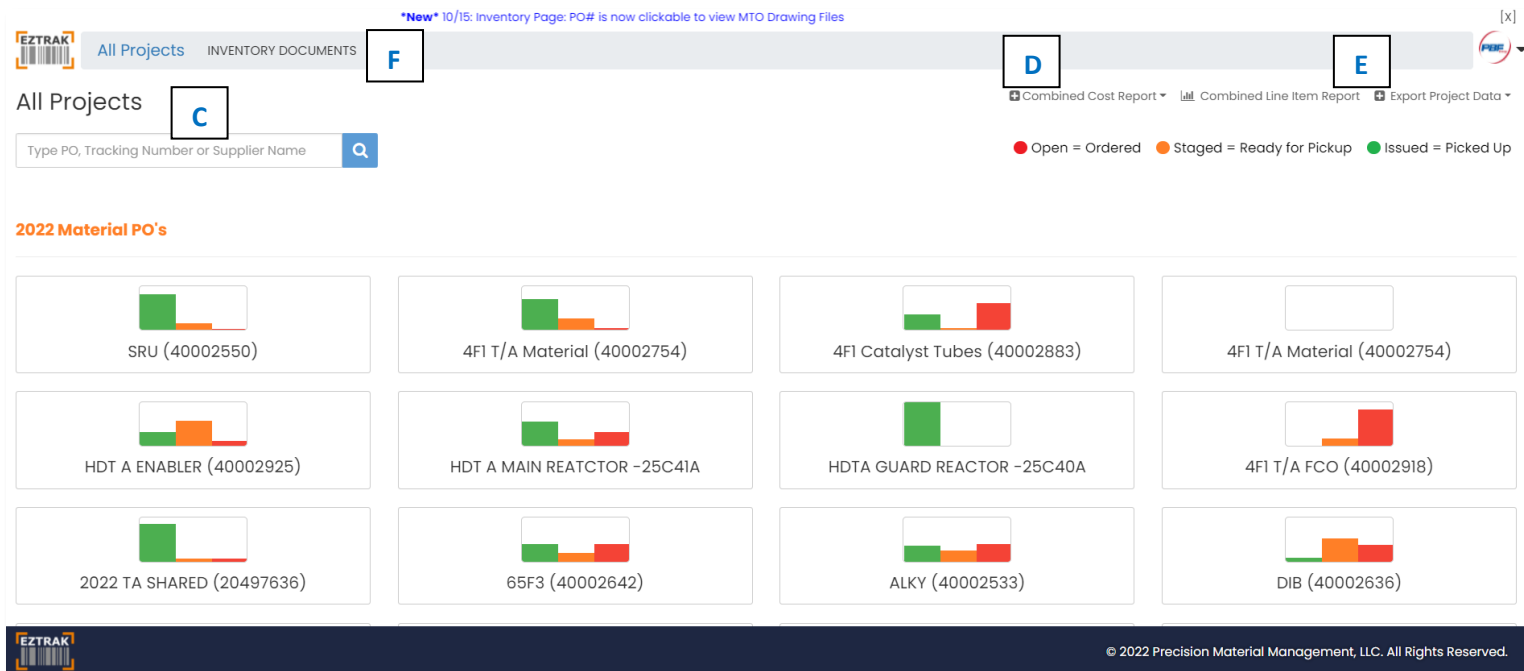
- a. Account Approval - To create a new EZTRAK account, please submit a request to [info@eztrak.net](mailto:info@eztrak.net)



- b. Website URL - Access your account by logging into <https://eztrak.net/login>
- c. Login Credentials - The username will be your email address. A temporary password will be provided to you within the account confirmation email you receive after submitting a request for access.
- d. Forgotten Password - If you lose or forget your password, click the [Forgot Password](#) link and submit your email address. A confirmation email with a temporary password will be provided. If you still have trouble logging in, please contract [info@eztrak.net](mailto:info@eztrak.net) for further assistance.



## 2. PROJECT DASHBOARD



- Display - Turnaround Projects are separated by (1) Year of event and (2) Material or Service Work Order
- PO Status - Purchase Orders within each project are broken into 3 status types which appear on the project graphs
  - Open** = Material or Service has an active purchase order but has not been delivered
  - Staged** = Material has been delivered and is available for pickup
  - Issued** = Material has been picked up by an approved Recipient
- Search Bar – Use the search bar to search for a PO, Tracking Number or Supplier from all units. The results will display any project(s) contain the entry. Click on the applicable project to be directed to the applicable line item.
- Reports –
  - Combined Cost Report**: Graphical and tabular views of PO status by Cost
  - Combine Line-Item Report**: Graphical and tabular views of P) status by PO line items



- e. **Exporting Data** –
  - i. **All Project Data**: Exports all information (including hidden fields) for all Projects within EZTRAK in excel
  - ii. **Open SAP = Yes Data**: Exports all project data that has been received in SAP but not available for pickup.
  - iii. **Open Material Report**: Exports all project data that has not been received in SAP
  
- f. **Inventory Document Lookup** – Search by PO for all delivery documents associated with the Purchase Order number. The results include Packing Slips, Proof of Delivery, Photos, PMI Reports, MTR and more.

\*New\* 10/15: Inventory Page: PO# is now clickable to view MTO Drawing Files [x]

EZTRAK All Projects INVENTORY DOCUMENTS PMI

**PO Documents**

Thumbnail	Category	Po Number	Po Item	Description	TimeStamp
<input type="checkbox"/>		4510387376	10	2" 300# Restriction Paddle, serrated gas	02/09/2022 09:14:28 AM
<input type="checkbox"/>		4510387734	10	ORGANIZER*Y377IH*SHELF FOR BIN 75"	02/08/2022 01:31:44 PM
<input type="checkbox"/>		4510388216	10	MOLDED CASE CIRCUIT	02/08/2022 06:39:14 AM
<input type="checkbox"/>		4510387264	10	type K thermocouple 42" active	02/07/2022 01:24:17 PM
<input type="checkbox"/>		4510386291	10	5/8-11 X 4-1/2 ( 4-1/4 FTF ) B7 ATS W/2-	02/07/2022 01:19:57 PM
<input type="checkbox"/>		4510385663	10	WRI 4 300 316L FG 316L IR	02/07/2022 01:01:01 PM
<input type="checkbox"/>		4510387165	10	5/8-11 X 6-3/4 B7 ATS W/2 2H NUTS	02/07/2022 12:46:14 PM
<input type="checkbox"/>		4510387505	10	FLEXITALLIC GSKT 36" 150#	02/07/2022 12:24:32 PM
<input type="checkbox"/>		4510387339	10	Thermocouple - 130 Flanged TW w/ 310 TC	02/04/2022 09:27:40 AM

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### 3. PROJECT DATABASE MANAGEMENT

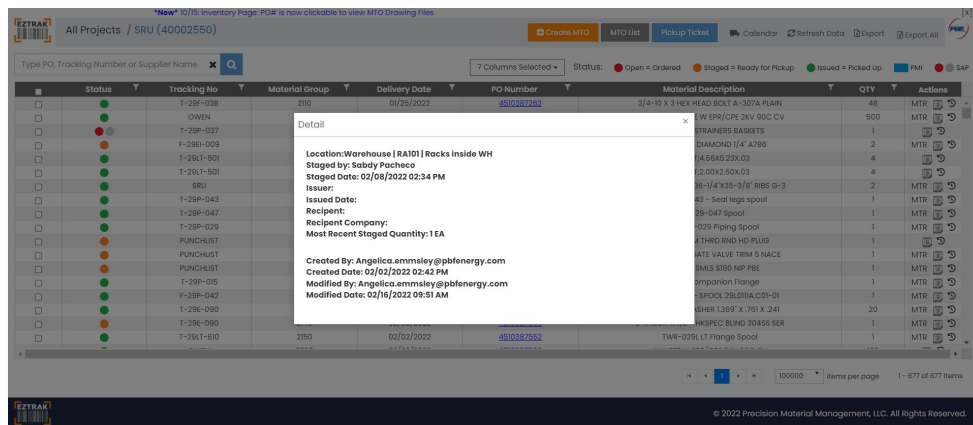
The screenshot shows the EZTRAK Inventory Page for project SRU (40002550). The interface includes a search bar (C), a legend for PO Status (D-i to D-iv), and a table of materials. Callouts A-F point to the '7 Columns Selected' dropdown, the legend, the 'Create MTO' button, the 'Pickup Ticket' button, and the 'Export All' button respectively.

	D-i	D-ii	Material Group	Delivery Date	PO Number	Material Description	QTY	D-iv	
<input type="checkbox"/>	●		T-29F-03B	2110	01/25/2022	4510387262	3/4-10 X 3 HEX HEAD BOLT A-307A PLAIN	48	MTR
<input type="checkbox"/>	●		OWEN	2799	12/30/2021	4510385788	ANIXTER STR TYPE W EPR/CPE 2KV 90C CV	500	MTR
<input type="checkbox"/>	●		T-29P-037	2150	02/14/2022	4510388030	14" 304 SS STRAINERS BASKETS	1	
<input type="checkbox"/>	●		F-29EI-009	2140	02/11/2022	4510387956	PLATE STEEL DIAMOND 1/4" A786	2	MTR
<input type="checkbox"/>	●		T-29LT-501	2799	02/28/2022	4510387729	GASKET;4.56X5.23X.03	4	
<input type="checkbox"/>	●		T-29LT-501	2799	02/28/2022	4510387729	GASKET;2.00X2.50X.03	4	
<input type="checkbox"/>	●		SRU	2120	02/02/2022	4510387689	GSKT 316/APX-2 36-1/4"X36-3/8" RIBS G-3	2	MTR
<input type="checkbox"/>	●		T-29P-043	2150	02/03/2022	4510387670	TWR-29P-043 - Seal legs spool	1	MTR
<input type="checkbox"/>	●		T-29P-047	2150	02/03/2022	4510387661	TWR-29-047 Spool	1	MTR
<input type="checkbox"/>	●		T-29P-029	2150	02/03/2022	4510387643	TWR-29P-029 Piping Spool	1	MTR
<input type="checkbox"/>	●		PUNCHLIST	2140	02/02/2022	4510387612	1/2 FS 3M-6M THRD RND HD PLUG	1	
<input type="checkbox"/>	●		PUNCHLIST	2140	02/02/2022	4510387612	1/2 800# TSW GATE VALVE TRIM 5 NACE	1	MTR
<input type="checkbox"/>	●		PUNCHLIST	2140	02/02/2022	4510387612	1/2X6 BLK SMLS S160 NIP PBE	1	MTR
<input type="checkbox"/>	●		T-29P-015	2150	02/02/2022	4510387594	29-015 Companion Flange	1	MTR
<input type="checkbox"/>	●		F-29P-042	2150	02/02/2022	4510387589	TWR-29P-042 - SPOOL 29L0111A.C01-01	1	MTR
<input type="checkbox"/>	●		T-29E-090	2140	02/03/2022	4510387555	H13 BELVILLE WASHER 1.369" X .761 X .241	20	MTR
<input type="checkbox"/>	●		T-29E-090	2140	02/03/2022	4510387555	8" X 150# X 1/2" THK SPEC BLIND 304SS SER	1	MTR
<input type="checkbox"/>	●		T-29LT-610	2150	02/02/2022	4510387552	TWR-029L LT Flange Spool	1	MTR

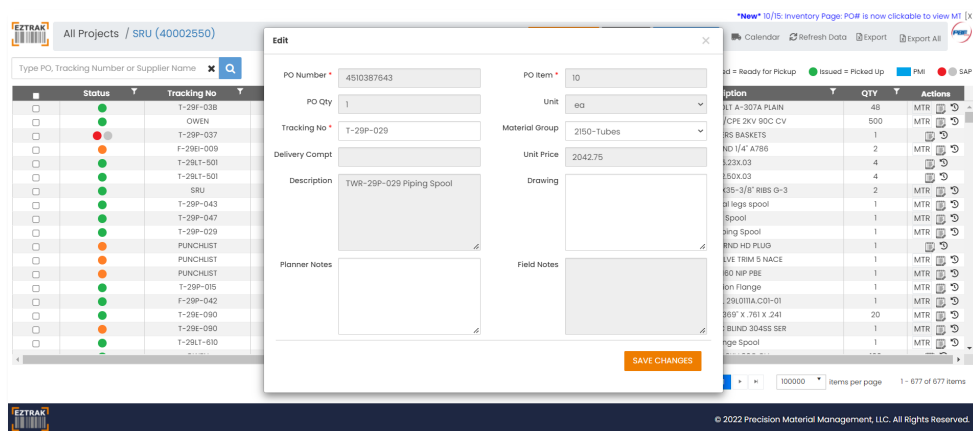
- a. Display – Select which columns you would like to appear on your project databases
- b. PO Status - Purchase Orders within each project are broken into 1 of 5 status types
  - i. **Open** = Material or Service has purchase order but has not been delivered
  - ii. **Staged** = Material has been delivered and is available for pickup
  - iii. **Issued** = Material has been picked up by approved Recipient
  - iv. **●● SAP** = Material has been Receipted in SAP but is not ready for Pickup
  - v. **■ PMI/On Hold** = Material has arrived at Warehouse but has not been Receipted
- c. Search Bar – Use the search bar to search for a PO, Tracking Number or Supplier from current unit only
- d. PO Data



i. Status History – Click on the status circle  for any item to view the complete Purchase Order history.

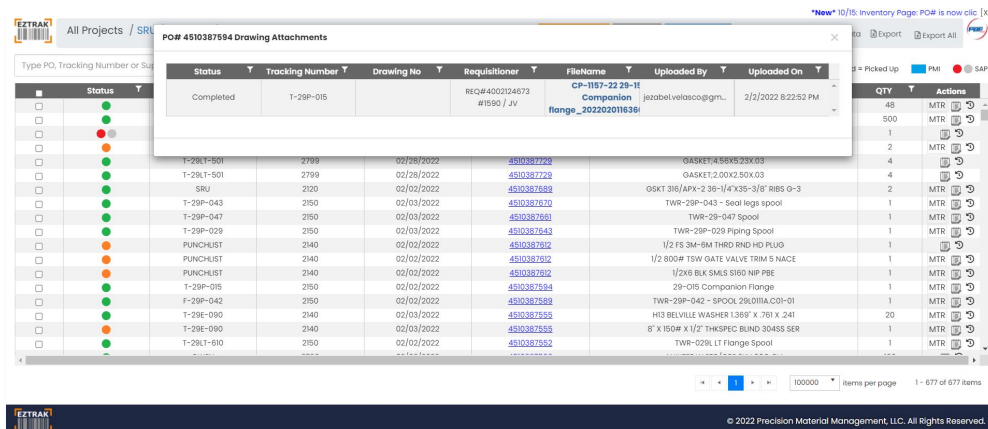


ii. Notes (Planner and Field) – Click on any PO line to view PO details and Field Notes. Planners can populated the Planner notes, which will be visible to warehouse personnel. Any notes from the Warehouse personnel will appear in the Field Notes section.

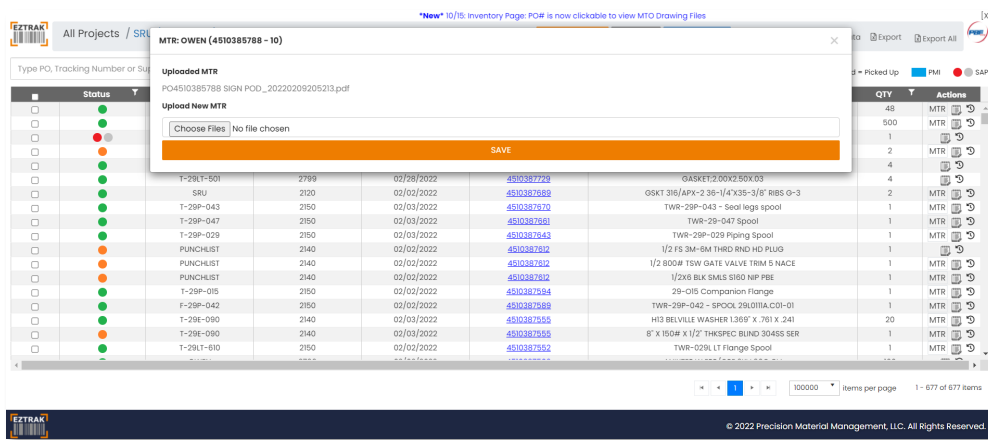




- iii. MTO & Requisition Files: Click on the blue PO number [4510387262](#) for any item to view the Drawing(s) and vender quote(s) provided during the Requisitioning process/






- iv. MTR's – Click on the MTR button <sup>MTR</sup> under the Actions section to view MTR's provided during delivery.









- e. Exporting Data – Press the export button  to Export selected data (must use checkboxes) only. Press the Export All  button to export all of the current project data to Excel.
- f. Pickup Tickets – Pickup Tickets must be presented to PMM personnel to receive any Turnround material. To create a Pickup ticket, select the applicable Checkbox(es) for all PO line items you wish to appear on the Ticket, then press the  button. A pdf will be generated which can be printed and/or saved to your computer.

2/16/22, 12:06 PM Inventory Print

 **SRU (40002550) - Inventory** Printed on: 02/16/2022

PO Number	PO Item	Description	QTY	UOM	Tracking#	Status	Staging	Issued	Drawing	Planner	Notes
4510387612	30	1/2 FS 3M-6M THRD RND HD PLUG	1.000	EA	PUNCHLIST	Staged	Warehouse   RA101   Racks inside WH				
4510387612	20	1/2 800# TSW GATE VALVE TRIM 5 NACE	1.000	EA	PUNCHLIST	Staged	Warehouse   RA101   Racks inside WH				
4510387612	10	1/2X6 BLK SMLS S160 NIP PBE	1.000	EA	PUNCHLIST	Staged	Warehouse   RA101   Racks inside WH				
4510387555	10	8" X 150# X 1/2" THK SPEC BLIND 304SS SER	1.000	EA	T-29E-090	Staged	warehouse   ra022   racks				


- g. Viewing and Creating MTO's
  - i. Viewing MTO's – Click on the MTO List button  to view and search MTO's associated with the existing project. Delete the Work Order number in the Search field to view MTO's from all projects.



Submitted Waiting Completed MTO Modified Long Lead Rush Special Handling  
 Future Order

Status	Date Created	Need By	Tracking No.	Track... Categor...	Drawing No	Work Order	Planner	Category	Requisition	PO Number	Attachmen...	Actions
<span style="color: green;">●</span>	02/09/2022	02/11/2022	FCO-290-009	BI		40002550	John.McTearney@pbfenergy.com	Expedite / Rush Order	REQ# 4002225163 / #1626 / AE	4503387555		
<span style="color: green;">●</span>	02/09/2022	02/10/2022	TWR-29P-037	P		40002550	bryan.young@pbfenergy.com	Normal Delivery	REQ# 4002126260 / #1631 / AE	4503388030		
<span style="color: green;">●</span>	01/27/2022	01/27/2022	TWR-29P-013	P		40002550	bryan.young@pbfenergy.com	Expedite / Rush Order	REQ# 4002124394 / #1557 / JV	4503387364		
<span style="color: green;">●</span>	02/01/2022	02/28/2022	TWR-29L1-501	LT		40002550	dave.cotner@pbfenergy.com	Expedite / Rush Order	REQ# 4502124680 / #1601 / AE	4503387729		
<span style="color: green;">●</span>	01/28/2022	01/29/2022	TWR-29C-018	C		40002550	randy.boehrt@pbfenergy.com	Expedite / Rush Order	REQ# 4002124486 / #1679 / AE	4503387565		
<span style="color: green;">●</span>	02/01/2022	02/03/2022	TWR-29P-043	P		40002550	bryan.young@pbfenergy.com	Normal Delivery	REQ# 4002124742 / #1589 / AE	4503387370		
<span style="color: green;">●</span>	02/01/2022	02/02/2022	TWR-29P-047	P		40002550	bryan.young@pbfenergy.com	Normal Delivery	#1586 / AE	4503387360		
<span style="color: green;">●</span>	02/01/2022	02/03/2022	TWR-29P-029	P		40002550	bryan.young@pbfenergy.com	Normal Delivery	REQ# 4002124756 / #1591 / AE	4503387343		
<span style="color: green;">●</span>	02/01/2022	02/03/2022	TWR-29P-015	P		40002550	bryan.young@pbfenergy.com	Normal Delivery	REQ# 4002124673 / #1590 / JV	4503387564		
<span style="color: green;">●</span>	01/26/2022	01/27/2022	FCO-29P-042	P		40002550	bryan.young@pbfenergy.com	Normal Delivery	REQ# 4002124650 / #1543 / AE	4503387368		
<span style="color: green;">●</span>	01/26/2022	01/27/2022	TWR-29L1-610	LT		40002550	bryan.young@pbfenergy.com	Normal Delivery	REQ# 4002124652 / #1545 / AE	4503387552		

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- ii. Creating MTO's – Click on the Create MTO button  to create a new MTO. Completed MTO will be received by the Turnaround Requisitioners who will solicit quotations from vendors before creating a Requisition, which gets converted into a PO and issued to the vendor. Please verify all information is correct and the latest drawings are submitted. MTO's can be edited from the MTO List page above.



**Add MTO** ✕

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Tracking No. \*  -  -  -

Work Order \*

Drawing No

Need By Date \*

Category \*

Sub Status

Special Handling?  Yes  No

*(Select Yes for items that require crane, special forklift for offloading at warehouse. Provide drawings, photo, dimensions, etc. in Notes section below. Supplier will be required to send delivery updates to Requisitioner.)*

**Notes:**

Please provide special instructions, preferred vendor, which items to order / don't order, notes for the vendor or warehouse, etc.

Drawing/Quotes  No file chosen

Drop your file here for  
Drawing/Quotes.

Vendor Quote  No file chosen

Drop your file here for Vendor Quote.

Quantity Needed	Item (eg Vendor part number)	PMI Req	Size	Length	Rating/Sch	Trim #	Description	
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="🗑"/>

[+ add new](#)

SAVE CHANGES

1. Required Fields:

- a. Tracking Number – Follow the required format (Type, Unit, Equip Type, Number)
- b. Work Order Number – Enter the applicable Work Order Number (please double check)
- c. Need By Date – Enter the date the material is required to be onsite



- d. Category - Enter the urgency status
- 2. Non- Required Fields – The fields are not required but are very helpful and reduce the chance for error. Please provide the Requisitioner as much detail as possible in order to secure accurate quotations.
- h. Special Delivery – Select Yes for items that are long-lead and/or require crane, special forklift for offloading at warehouse. Provide drawings, photo, dimensions, etc. in Notes section below. Selecting Yes will notify the warehouse and require the Supplier will be required to send delivery updates to the Requisitioner.

Special Handling?  Yes  No

*(Select Yes for items that require crane, special forklift for offloading at warehouse. Provide drawings, photo, dimensions, etc. in Notes section below. Supplier will be required to send delivery updates to Requisitioner.)*

**Shipping Info:**

Delivery Date	Pmi Req?	Crane Needed?	Forklift Needed?	Notes	
02/16/2022	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	

[+ add new](#)

#### 4. CUSTOMER SUPPORT AND SPECIAL REQUESTS

Need support or hands-on training? Have new ideas to improve the system? We are happy to assist! Please contact us at [info@eztrak.net](mailto:info@eztrak.net) or contact Jason Johnson at 626-327-6348.