# **LubeAlert** Oil Condition Monitoring Service

The webinar will begin in less than 10 minutes.









# **LubeAlert** Oil Condition Monitoring Service

The webinar will begin in less than 5 minutes.











A Guide to Equipment Health









# Frank Hayes - CLS, OMA-I, MLA-I, MLT-I, CLGS & CRC



- CITGO Product Specialist
- B.S. Mechanical Engineering
- 25+ Years Experience in Lubricants, including with
  - Petro-Canada Lubricants, Sr.
     Technical Services Advisor
  - Conoco, Lubrication Engineer



### **Jamie Morford**

- CITGO Senior Account Manager
- 20 Years of Lubricants Industry Experience
- Background in Operations and Sales Management



# Agenda



Why use LubeAlert

How to use LubeAlert

Leveraging LubeAlert



### Questions as we go?



Please post your questions using the Q&A function.



### **Benefits**









Decrease Unexpected Downtime



Optimize Lubricant Useable Life





Increase Equipment Resale Value

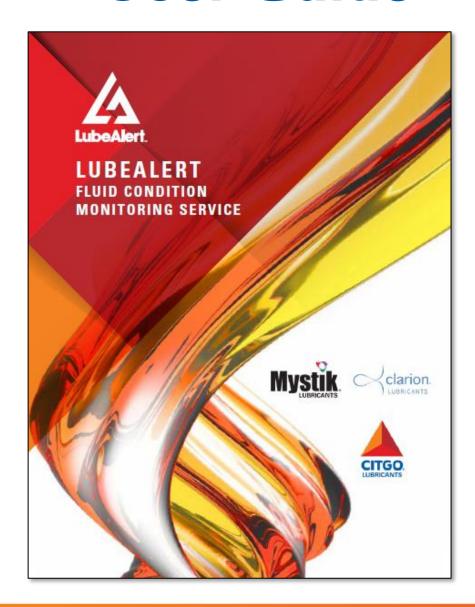


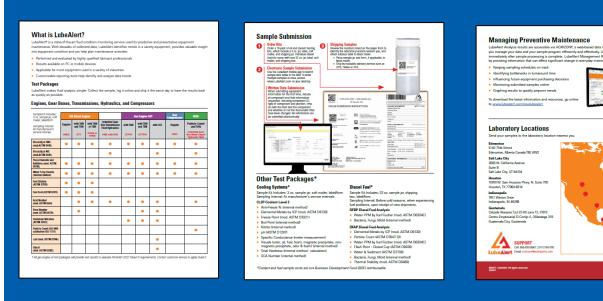
Track Equipment Condition Trends



### **User Guide**







LEARN MORE ABOUT OUR LUBEALERT SOLUTIONS:

DOWNLOAD THE LUBEALERT FLYER

LUBEALERT FAQS

# Agenda



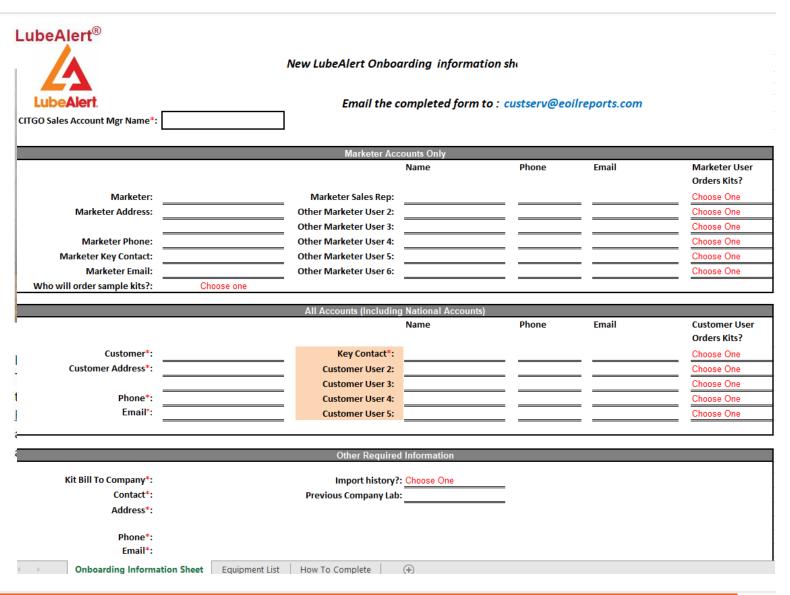
Why use LubeAlert

How to use LubeAlert

Leveraging LubeAlert



### **How to Enroll**





EQUIPMENT REGISTRATION

		Component Data Sheet	for Preloadin	g or Updating Equipment Lists				
		Customer	•			Locatio	n·	
		Customer: Completed By:			Ema			
		completed by				Ellia		
Station Name 🔻	City =	COMPONENT ID	POSITION	▼ SECONDARY ID	COMPONENT TYPE	<b>▼ COMPONENT MANUFACTURE</b>	COMPONENT MC	
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Equipment Li	e+ U	ow To Complete						CONTROL DIS SCHOOL BIS
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# LubeAlert Test Packages



#### Engines, Gear Boxes, Transmissions, Hydraulics, and Compressors

Sample kit Includes: 3 oz. sample jar, soft	HD Diesel Engine				Gas Engine Oil*			Gas Compressors	WGF
mailer, label/form  Sampling Interval: At manufacturer's	Regular	with TAN and TBN	with TAN or TBN	Industrial Gear Box Transmission Fluid Hydraulics	with TAN	with TAN and TBN	with LFG	Regular	Particle Count and TAN
service interval.	HREG	нтт	HTAN or HTBN	HNE with TAN	GTPW	GTTPW		GREG	Industrial Gear Box Water Glycol Hydraulic Fluid
Viscosity at 100C (mod.ASTM D445)	•	•	•	•	•	•	•	•	•
Viscosity at 40C (mod.ASTM D445)				•			•		•
Trace Elements and Additives (mod. ASTM D5185)	•	•	•	•	•	•	•	•	•
Water % by Crackle (internal method)	•	•	•	•	•	•	•	•	•
Fuel Dilution (ASTM D7593)	•	•	•						
Fuel Soot (ASTM E2412)	•	•	•						
Acid Number (mod. ASTM D664)		•	•	•	•	•	•		•
Base Number (mod. ASTM D4739)		•				•	•		
Oxidation/ Nitration (ASTM E2412)					•	•	•		
Particle Count (ISO 4406 calibration ISO 11171)									•
i-pH (mod. ASTM D7946)							•		
Glycol (mod. ASTM D2982)							•		

<sup>\*</sup> All gas engine oil test packages will provide test results to evaluate NESHAP ZZZZ (Quad Z) requirements. Contact customer service to apply Quad Z.

### **LubeAlert Kits**



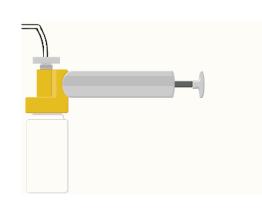


### Taking an Oil Sample



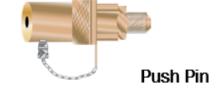
Drain Catch Method Vacuum Pump Method Sample Valve Methods







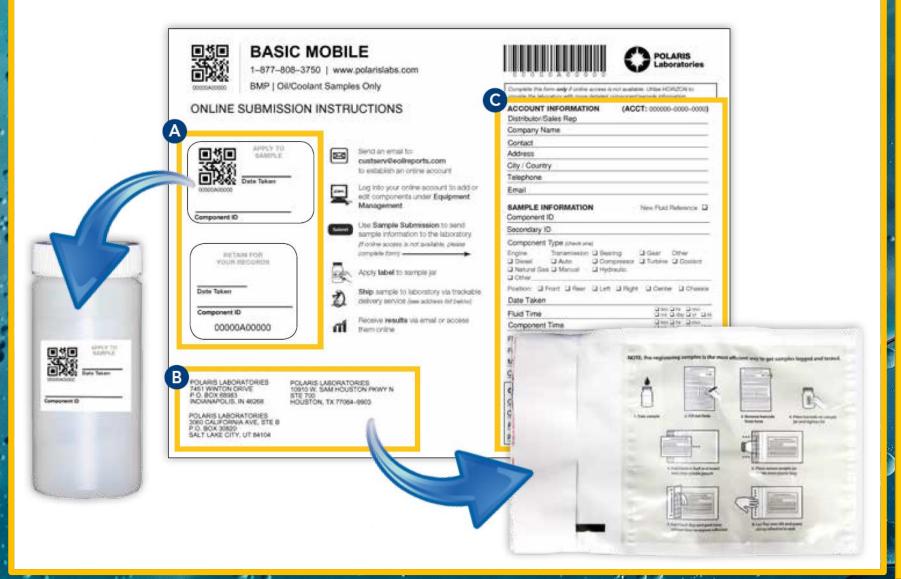
**Push Button** 



- Stay consistent with sampling technique and location.
- Never reuse disposable tubing.
- Purge stagnant oil from installed devices and tubing before collecting samples.
- Make sure the sample bottle is clean and free of contaminants.

# Submitting Your Samples

#### SUBMITTING YOUR LUBRICANT, COOLANT AND FUEL SAMPLES



#### **Shipping Samples**

- A. Affix bar code label to clean jar.
- B. Affix shipping address label to clean envelope
- C. Fill out all equipment and fluid information in the HORIZON® web or mobile app to eliminate:
  - Oil spills on paperwork
  - Handwriting errors
  - Duplicate equipment
  - Holds due to missing information
  - Sending paperwork with the sample
- Send the sample to the lab immediately using a trackable mail service



# **Using EZ Label**



#### **HD OIL BRONZE**

1-XXX-XXX-XXXX | www.lubealert.com HDBRONZE | Oil Samples Only

#### ONLINE SUBMISSION INSTRUCTIONS



APPLY TO SAMPLE

Component ID

RETAIN FOR YOUR RECORDS

Date Taken

Component ID

00000A00000



Send an email to: custserv@eoilreports.com

to establish an online account



Log into your online account to add or edit components under Equipment Management



Use Sample Submission to send sample information to the laboratory (If online access is not available, please complete form)



Apply label to sample jar



Ship sample to laboratory via trackable delivery service (see address list below)



Receive results via email or access

LUBEALERT LAB 7451 WINTON DRIVE P.O. BOX 68983 INDIANAPOLIS, IN 46268

HOUSTON, TX 77064-9903

P.O. BOX 30820 3060 CALIFORNIA AVE. STE B SALT LAKE CITY, UT 84104

10910 W. SAM HOUSTON PKWY N



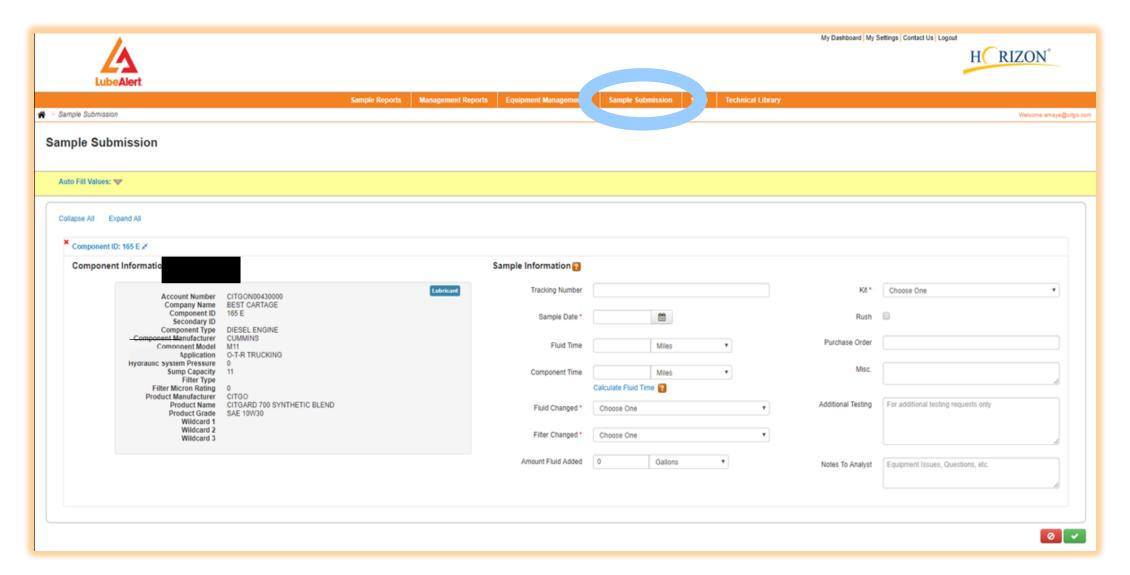


0000		EUDOAIGH	
		is not available, Utilize HORIZON to d component/sample information.	Ġ.
ACCOUNT INI Distributor/Sale	o Pon	(ACCT: CITC	30A)
Company Nam	е		
Contact			
Address			
City / Country			
Telephone			
Email			
SAMPLE INFO	PRMATION	New Fluid Reference	e 🗆
Secondary ID			
Component Typ	pe (check one)		
Engine Diesel Natural Gas Other	Transmission Auto Manual	☐ Bearing ☐ Gear ☐ Turbine ☐ Hydraulic	
Position: De Fro	nt 🗆 Rear 🗆 Le	ft 🗆 Right 🗀 Center 🗀 Chas	sis
Fluid Time		□ km □ hr □ r □ mi □ day □ y	
Component Tin	ne	Okm Ohr Or Omi Oday Oy	no r D
Fluid Changed	☐ Yes ☐ No		
Filter Changed	☐ Yes ☐ No	Unknown	
Misc		**************************************	
Comments			
	INFORMATIO	N (For first-time samples or change	is only
Manufacturer			
Model			
Product Mfr	0.00000200000		u iso
Product & Visc	osity Grade		SA



Combined with online sample submission, this label reduces:

- Paperwork
- Minimizes errors
- Moves your samples to the laboratory floor quicker



# Online Submission



# **Component Tags Simplify Submission**





# Print QR codes directly from H RIZON®







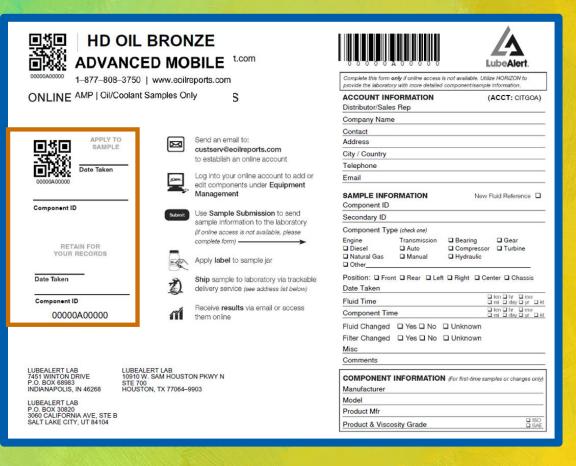
## SUSTAINABILITY INITIATIVE



More than 1.9M paper registration forms are distributed around the world and only 50% are used resulting in an ever-growing amount of waste.

As part of our green initiative to help protect the planet, customers now have the opportunity to order QR code-only sample jar labels.

These labels are small 2"x1" labels that function similarly to the sample jar label found on your program's Sample Information Form today.



As of July 1, 2022: all orders for full-sized Sample Information Forms are invoiced \$0.10/label.

# Updating to the New OR Code Label



# DRIVING EFFICIENCIES TOGETHER

SUSTAINBILITY INITIATIVE

# LubeAlert Reports







CIT = Marketer Digits 1-6

**CITGON** 

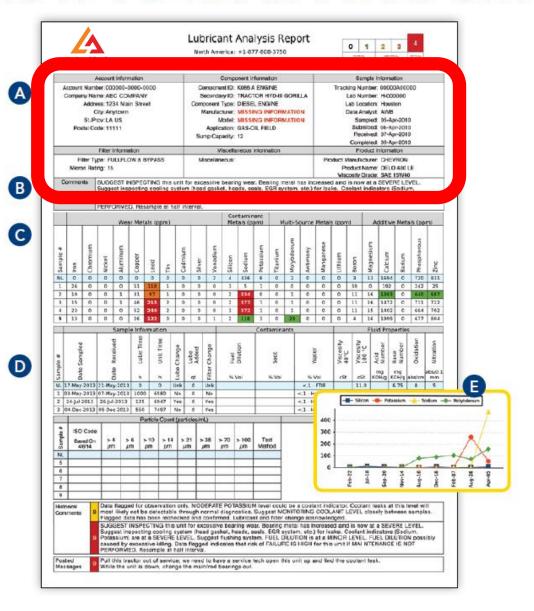
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CITGON =
National
Accounts
Digits 1-6

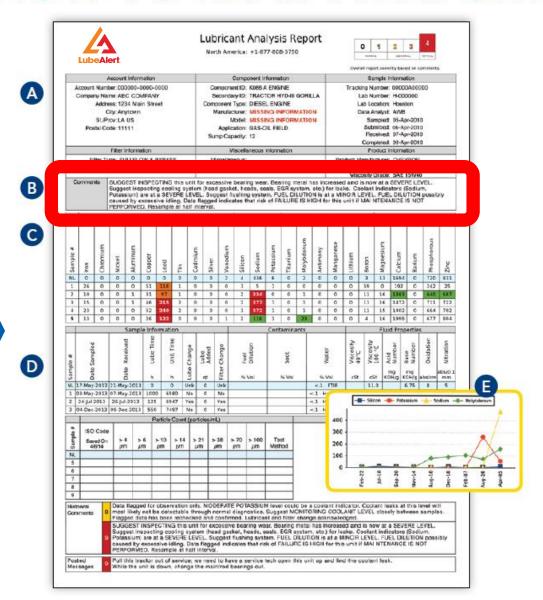
Digits 7-10: End-User (YYYY) Digits 11-14: Location/Site (LLLL)

# Getting Reports to the Right People



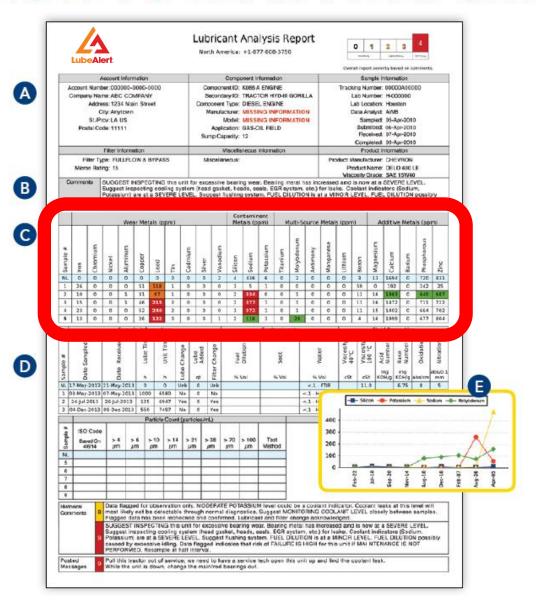


- Compare shipping and processing dates to evaluate turnaround time.
- Determine the analyst making recommendations.
- Update missing information and request an immediate reevaluation.
- Track sample-specific information using the Miscellaneous field such as "who took the sample' or 'work order number".



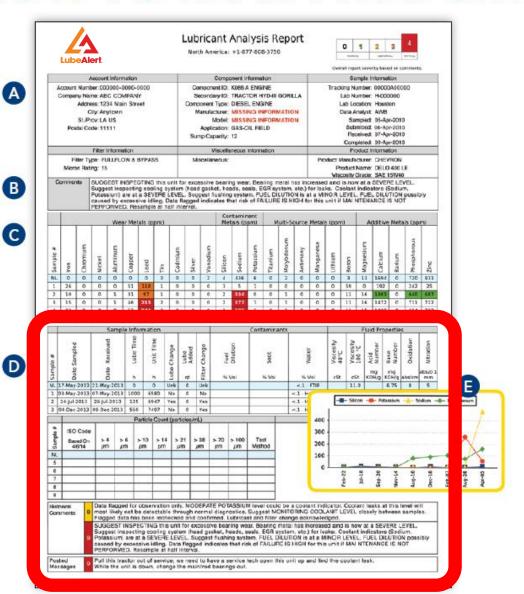


- Explains significant changes.
- Recommends actions for rectifying any issues.
- Provides a roadmap to the most important information.
- Lists any actions that need to be taken in order of severity.
- Justifications for recommending those actions immediately follow.



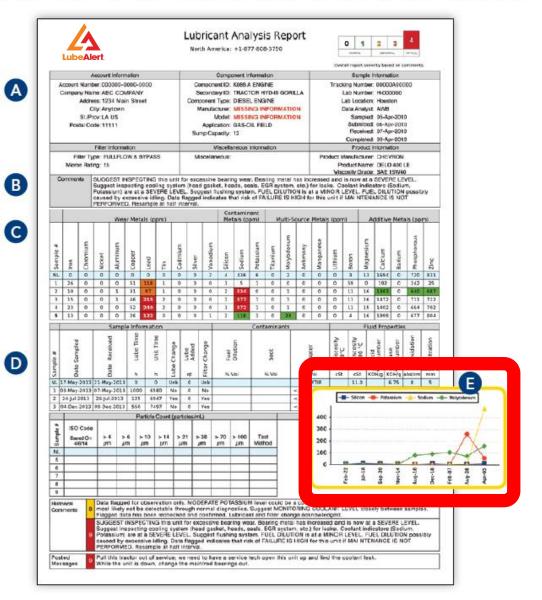


- Elemental Analysis, or Spectroscopy, identifies the type and amount of wear particles, contamination and additives.
- Determining metal content can alert you to the type and severity of wear occurring in the unit.
- Measurements are expressed in parts per million (ppm).





- New lube results are listed first for a point of reference.
- Fluid analysis program test results are listed according to age of the sample, so trends are apparent.
- Significant changes are flagged and documented in the comments section.





- There are ten customizable graphs available
- Help you pinpoint developing trends To turn on graphs
  - log into LubeAlert Horizon
  - go to My Settings > Sample Report Display.

# Logging In to LubeAlert Horizon

www.lubealert.com





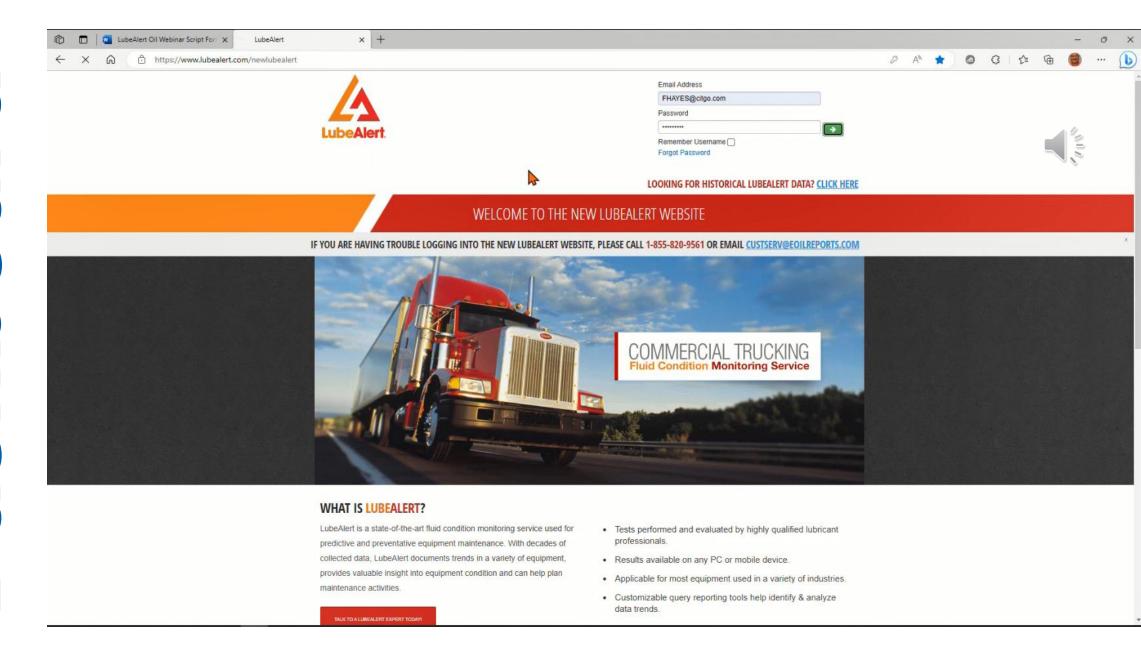


LOOKING FOR HISTORICAL LUBEALERT DATA? CLICK HERE

#### WELCOME TO THE NEW LUBEALERT WEBSITE

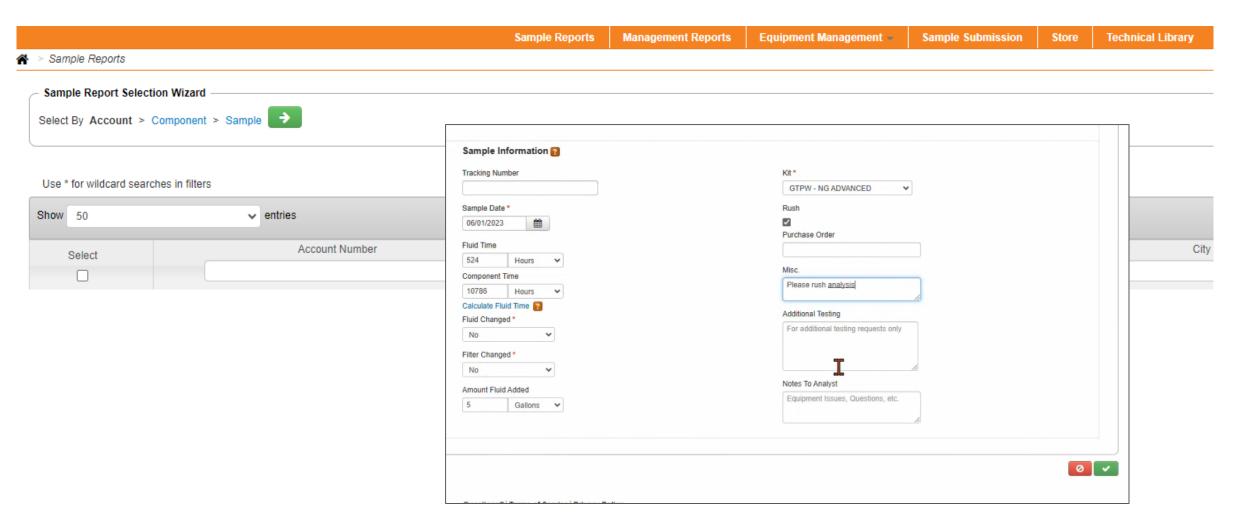
IF YOU ARE HAVING TROUBLE LOGGING INTO THE NEW LUBEALERT WEBSITE, PLEASE CALL 1-855-820-9561 OR EMAIL CUSTSERV@EOILREPORTS.COM





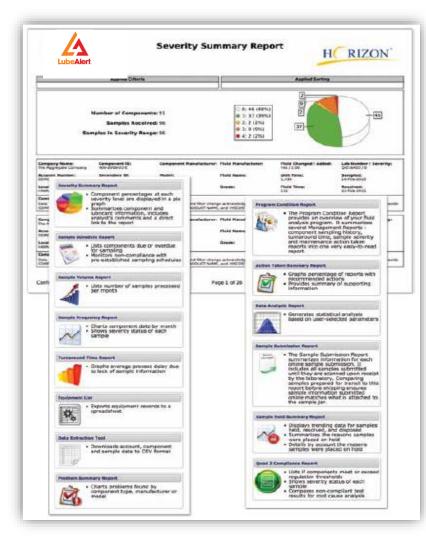
# Sample Reports





# **Management Reports**







#### Severity Summary Report

- · Component percentages at each severity level are displayed in a pie graph
- Summarizes component and lubricant information, includes analyst's comments and a direct link to the report



#### Sample Schedule Report

- · Lists components due or overdue for sampling
- · Monitors non-compliance with pre-established sampling schedules



#### Sample Volume Report

· Lists number of samples processed per month



#### Sample Frequency Report

- · Charts component date by month
- · Shows severity status of each sample



#### **Turnaround Time Report**

· Graphs average process delay due to lack of sample information



#### Sample Submission Report

- · Summarizes information for each online sample submission
- · Includes all samples submitted until they are scanned upon receipt by the laboratory
- Comparing samples prepared for transit to this report before shipping ensures sample information submitted online matches what is attached to the sample jar



#### Data Extraction Tool

· Downloads account, component and sample data to CSV format



#### Problem Summary Report

· Charts problems found by component type, manufacturer or model



#### Program Condition Report

- Provides an overview of your fluid analysis program
- Summarizes several Management Reports component sampling history,
- turnaround time, sample severity and maintenance action taken reports into one very easy-to-read report



#### Action Taken Summary Report

- · Graphs percentage of reports with recommended actions
- Provides summary of supporting information



#### Data Analysis Report

Generates statistical analysis based on user-selected parameters



#### Equipment List

· Exports equipment records to a spreadsheet



#### Sample Hold Summary Report

- · Displays trending data for samples held, resolved, and disposed
- Summarizes the reasons samples were placed on hold
- · Details by account the reasons samples were placed on hold

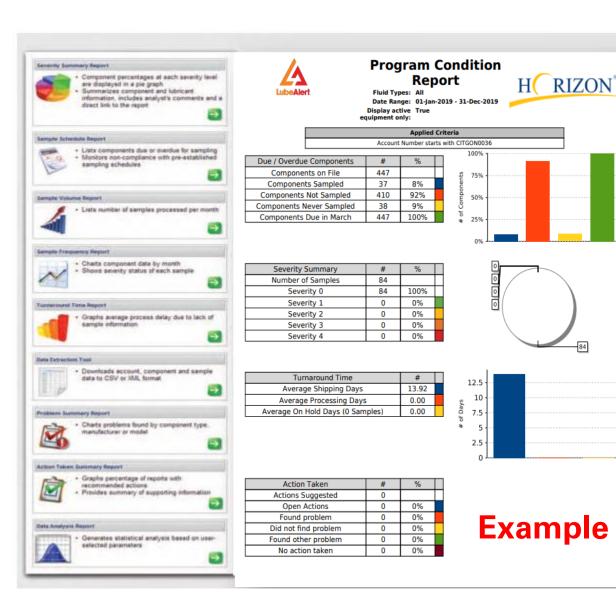


#### Quad Z Compliance Report

- · Lists if components meet or exceed regulation thresholds
- Shows severity status of each sample
- Compares non-compliant test results for root cause analysis

# Keep Program on Track







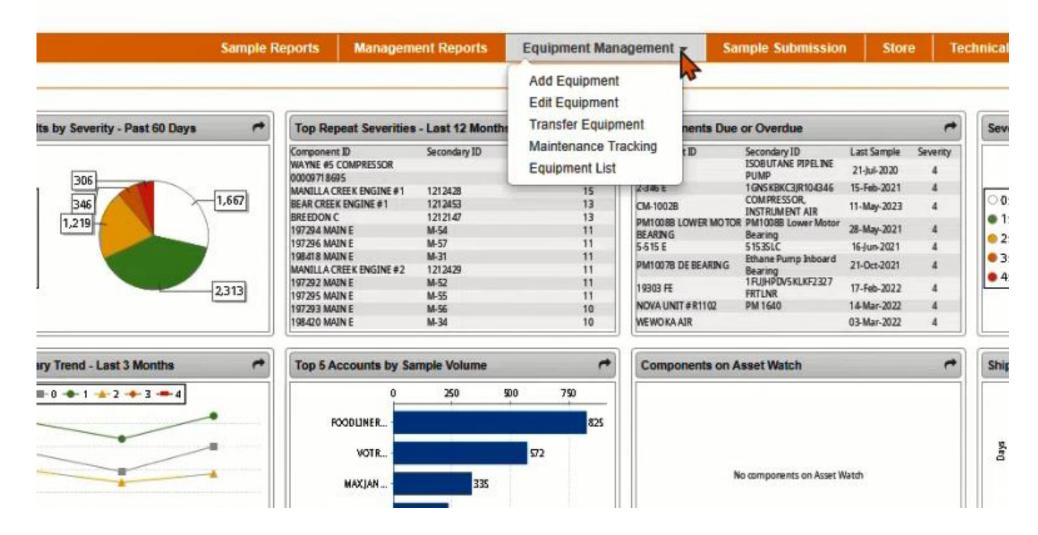
# **Identify Biggest Problems**



© 0	Problem Summary Report	× +						- 0 ×
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Manag	gement Reports > Management Repo	orts						Welcome fhayes@citgo.com
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Select	your information —					1		
	Report Type C	Component Type		Time Period  Last Number of Days			Fluid Types  ☐ Lubricant ☐ Fuel ☐ Coolant ☐ Grease	
		Appl	ied Criteria					
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# Equipment Management





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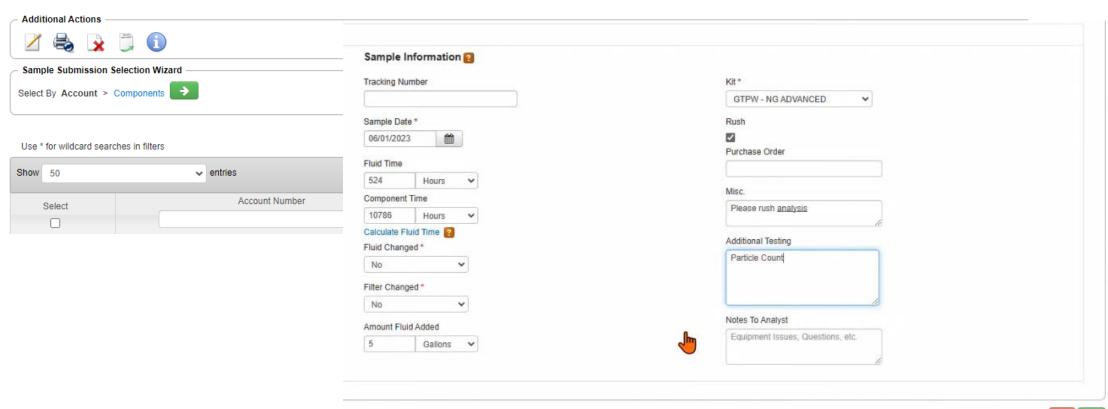


## Sample Submission



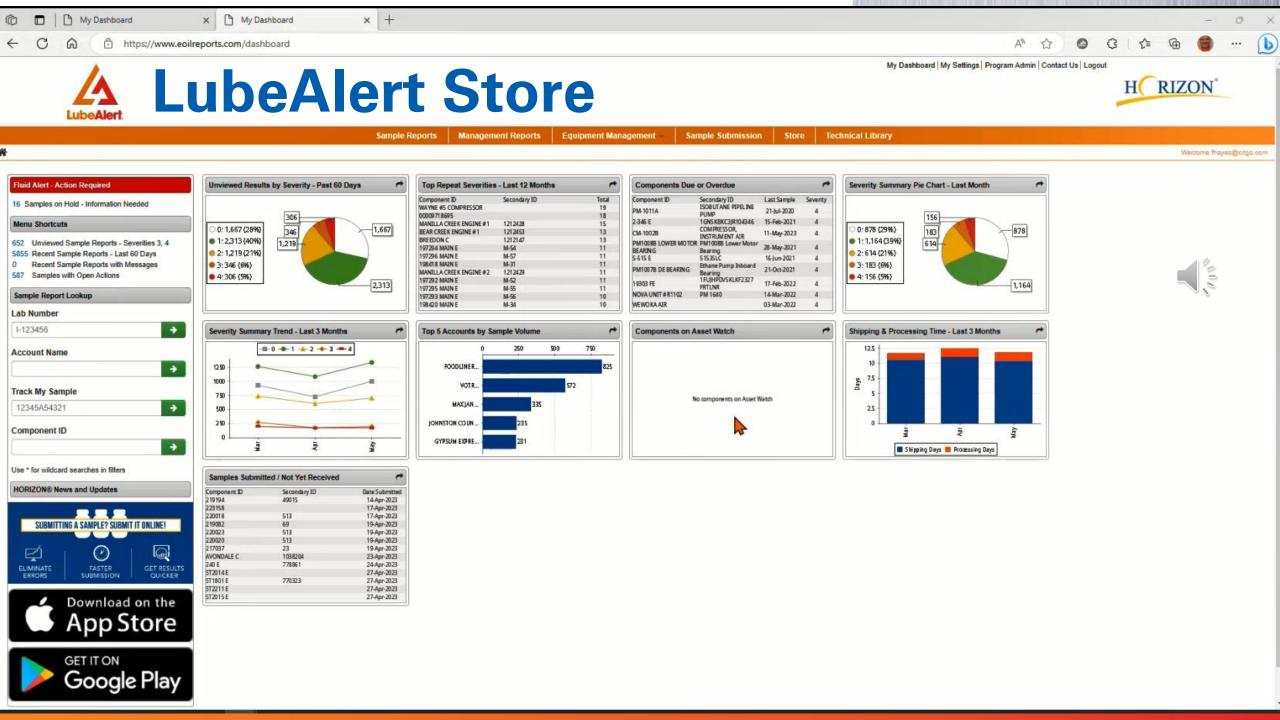
**Technical Library** Sample Reports Management Reports Equipment Management • Sample Submission Store ♠ > Sample Submission

### Sample Submission









### **LubeAlert Store Items**

Kits Jars/Mailers Prepaid Postage Supplies Coolant Kits All Item Number Description Kit Contents Coolant 3 oz Sample Jar and SOFT Mailer CL2P CL2P | COOLANT LEVEL 2 PREPAID TESTING WITH KITE3 Sample Information Form Diesel Fuel Mobile and Industrial **Diesel Fuel** Item Number Description Kit Contents 16 oz Diesel Fuel Kit DFAP DFAP I ADV. DIESEL FUEL PREPAID TESTING W/KITFC Sample Information Form 16 oz Diesel Fuel Kit DFCLP DFCLP | DF CLEANLINESS PREPAID TESTING W/KITFC Sample Information Form Mobile and Industrial Item Number Description Kit Contents 3 oz Sample Jar and SOFT Mailer BASIC BASIC | BASIC INDUSTRIAL PREPAID TESTING Sample Information Form

Supplies

Prepaid Postage Jars/Mailers

### **Prepaid Postage**

Prepaid Postage

Prepaid Postage

Item Number	Description
PPOST	USPS Prepaid Return Envelope Mailer/Closest Lab
PPOSTHOU	USPS Prepaid Return Envelope Mailer / HOUSTON (Orange Mailer)
PPOSTIND	USPS Prepaid Return Envelope Mailer / INDY (Blue Mailer)
PPOSTSLC	USPS Prepaid Return Envelope Mailer / SLC (Green Mailer)
PPUPS	Prepaid UPS Return Label / 10 Samples
PUPSND	Prepaid UPS Next Day Return Label
SHIPMX	Mexico Shipping Point

Kits	Jars/Mailers	Prepaid Pos	tage Supplie	es	
Jars/Mailers		Jars/Mailers			
All		Item Number		Description	
Jars/Mai	lers	JAR16		16 oz Sample Jar	
		JAR3		3 oz Sample Jar	
		JAR32		32 oz Opaque HDPE Sample Jar	
		JAR64HDPE		64 oz Opaque HDPE Sample Jar	
		JAR8		8 oz PET Certified CLEAN Sample Jar	
		JAR8HDPE		8 oz Opaque HDPE Sample Jar	
		JARC		4 oz Clear PET Sample Jar	
		JARC8		8 oz Clear PET Sample Jar	
		JARHSO		4 oz HDPE Certified CLEAN Sample Jar	
		INDIGO		4 or DET Cortified CLEAN Sample for	
	Kits	Jars/Mailers	Prepaid Postage	Supplies	

#### Other Supplies All Item Number Description Other BOX10P Box 10 Pack Tubing FRACTM Refractometer Vacuum JL6SSL 6 in. Silicone Jar Lid Seal Valves Component Tag Label Paper w/Instruction Sheet LBLCTAG QDCAP Cap and Needle Valve QDCAP10 Cap and Needle Valve (10-PK) SCANR1 UPC Barcode Scanner Black w/USB Port TESCOL Coolant 4 way test strips TESELC Coolant test strips - 40240

**Tubing** 

### **LubeAlert Store Cart**

### Description



### JAR8

8 oz PET Certified CLEAN Sample Jar (1) 8 oz PET Certified CLEAN Sample Jar



#### **PUPSND**

Prepaid UPS Next Day Return Label
(1) Prepaid UPS Next Day Return Label



### TR1000

1000 ft. Length 1/4 in. Plastic Tubing (1) 1000 ft. Length 1/4 in. Plastic Tubing



#### DRIVE TRAIN

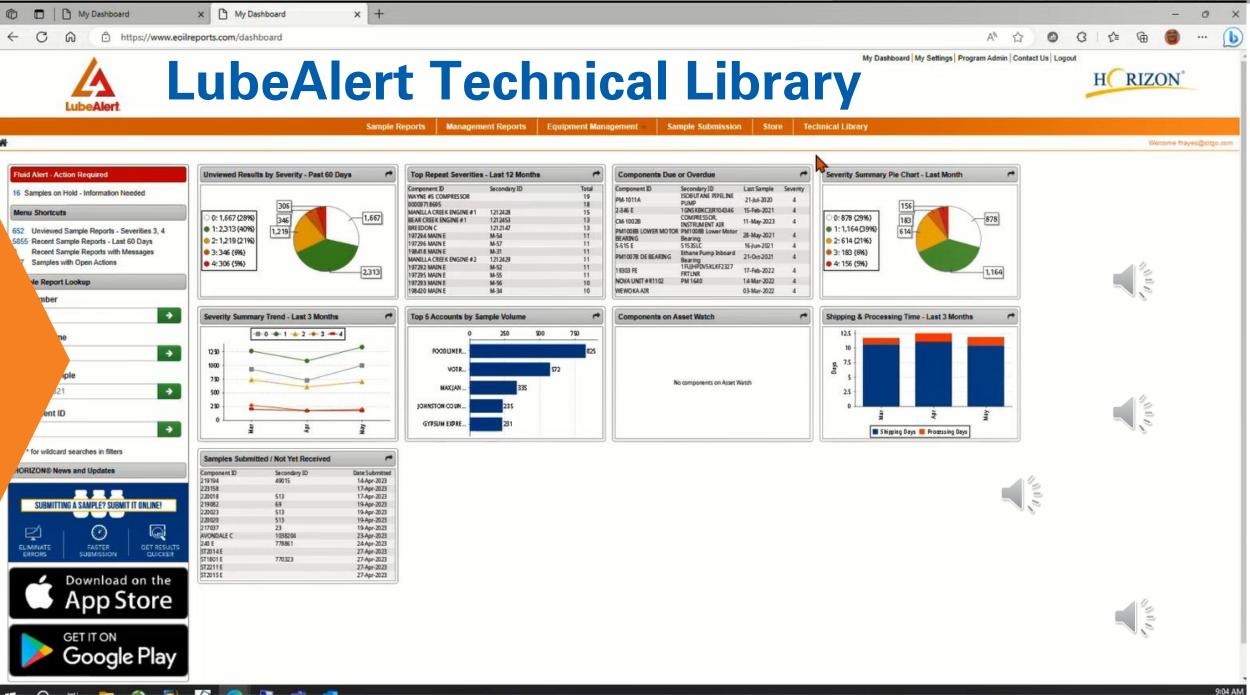
HNE

(10) HNE | IND GEAR BOX, HYD, AND TRANS FLUID W/ TAN

(10) 3 oz Sample Jar and SOFT Mailer

(10) Sample Information Form







# Mobile App



# Take Action. Anytime. Anywhere.

Save five minutes per sample with electronic submission and report alerts

# The power of LubeAlert® is at your fingertips!



### CITGO LubeAlert

Powered by HORIZON



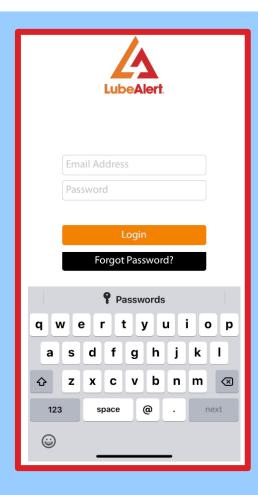






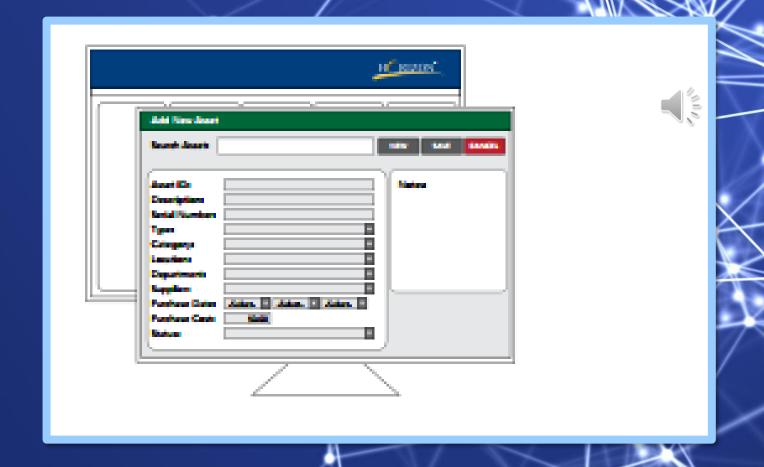
### **MOBILE APP**





### SAMPLE SUBMISSION

- Tap on the LubeAlert® icon on your phone.
- Just like the online page, Login using your email address and password



With DataConnect, you can manage oil analysis samples and results through your own maintenance system.

# **Maintenance Tracking**



See elevated wear particles as a result of break-in wear of new or rebuilt components

Confirm your maintenance action corrected the problem of high-severity trending



Quickly associate how oil changes impact testing results



**Monitor Maintenance** Services, Repairs and Rebuilds in LubeAlert **HORIZON®** 

# Agenda



Why use LubeAlert

How to use LubeAlert

Leveraging LubeAlert



# **Lubricant Performance Demonstration**

Proof of product performance

Competitive comparison

Data source for savings calculations

CITGO HD ENGINE OIL A CALCULATOR



# **IOT Applications**

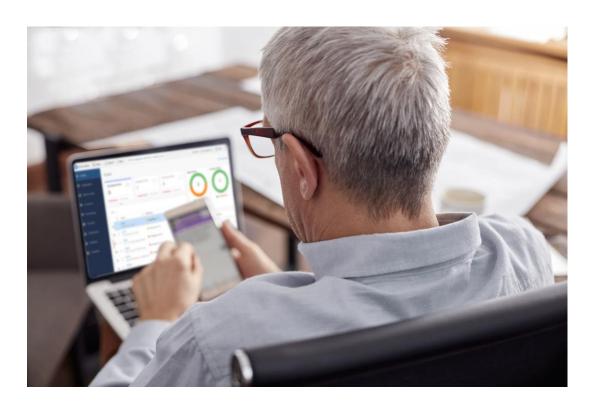




With DataConnect, we can share critical data (properties and contaminants) via the Internet of Things (IOT) with maintenance software to trigger maintenance activities.

### **Critical Data include:**

- Viscosity
- Oxidation
- Acid Number
- Base Number
- Water Content
- Wear Metals
- Contaminant Metals



# Maintaining Warranty



- Extended Drain Intervals
- Extended Warranties



### **OEM Oil Change Interval Recommendations**

### OEM Diesel Engine Oil Drain Recommendation Summary

	Service	API CK-4
Cummins	Light (>7.0 MPG)	75,000 (up to 100,000 with Cummins Oil Guard Program
	Normal (6.0 – 6.9 MPG)	50,000
	Short Haul (<5.0 – 5.9 MPG)	40,000
	Severe	25,000
Detroit Diesel	Efficient Long Haul (>7.0 MPG)	75,000 (DD15) / 65,000 (DD13)
	Long Haul (>6.0 MPG )	60,000 (DD15) / 55,000 (DD13)
	Short Haul (5.1-5.9 MPG )	45,000 (DD15) / 40,000 (DD13)
	Severe (<5 MPG )	35,000
Mack/ Volvo	Line Haul / Normal Duty (>6 MPG)	60,000**
	Regional Haul / Heavy Duty (>5 MPG)	45,000**
	Heavy Haul / Severe Duty (<5 MPG)	35,000**
Caterpillar		Application Specific
Navistar	Light (> 6.5 MPG)	50,000 (up to 70,000 with oil analysis)
	Moderate (5.5 – 6.5 MPG)	30,000
	Severe (<5.5 MPG)	20,000
PACCAR	On Highway Light, <20% Idle	up to 75,000 with oil analysis
	On Highway Standard, > 20% Idle	50,000
	Vocational/Severe	30,000
GM (Duramax 6.6L)		7,500***
Ford (Powerstroke Diesel)		2,500 - 10,000***

<sup>\*</sup> For API category comparison purposes only; refer to OEM service literature for official oil drain details. Chart used with permission from Infin

# Resale Value of Equipment



# Resale Value of truck affected by:

- Market Conditions
- General Vehicle Condition
- Engine and Drivetrain Mileage
- Frame Mileage
- Idle Time
- Maintenance History
- Oil Analysis History



# Support



- RICE NESHAP monitoring for Natural Gas Engines
- CITGO National Account Support
- CITGARD Testimonies
  - Extended ODI
  - Fuel Efficiency





### CITGARD - Dri

426K views • 3 mon

A CITGO Lubrica

CITGARD Heavy Duty

4K

#### Foodliner\*/Quest Liner\* Increased Oil Drain Intervals by 24.3% After Transitioning to CITGARD\* 700 MFE Synthetic Blend Heavy Duty Engine Oil SAE 10W-30

One of the largest bulk food grade and specialty chemical carriers in the United States – Foodliner/Quest Liner- operates a fleet consisting of older and newer diesel and multi-fuel engines transiting varying temperature ranges across North America. Extending engine oil drain intervals and reducing annual fuel costs are top business priorities.

Always looking to deliver better results, CITGO presented tools and resources to help Foodliner/ Quest Liner analyze their fleet to gain insights on how low viscosity engine oils, specifically formulated to extend oil drain intervals and immove fuel economy could exceed their executations.

Following consultations with CITOD technical experts and utilizing CITOD Usebarie Fluid Condition Monitoring Service, Foodiner/Dust Liner doubled their old ratio interval to 48,000 miles with CITGARD 000 and then nonessed to 72,000 miles with CITGARD 000 and then nonessed to 72,000 miles with CITGARD 000 and then nonessed to 72,000 miles with CITGARD 700 MTE Synthetis Blend Heavy Dury Engine DIS ASE 1995 of the CITGARD 700 miles. The data proved that switching to CITGARD 700 miles. The data proved that switching the CITGARD 700 miles. The data proved that switching the CITGARD 700 miles. The data proved that switching the CITGARD 700 miles. The data proved that switching the CITGARD 700 miles. The data proved that switching the CITGARD 700 miles. The data proved that switching the CITGARD 700 miles. The data proved that switching the CITGARD 700 miles. The data proved the city that the CITGARD 700 miles. The data proved

In 2021, Foodiner/Quest Liner acquired another fleet. The acquisition came with a new set of dislanges, including new engine technology that utilized compressed natural gas (INS) fuel. After consultation with the CITGO team, Foodiner/Quest Liner, began using Multi-Fuel CITGARD Bot Synthotic Blend Heavy Duty Engine Oil (formerly CITGARD NCM) MS: Engine Oil)

#### The Dependable Approach to Sales

Foodliner/Quest Liner's Vice President of Maint

Vice President of Maintenance at Foodliner/Quest Liner

at now at 90,000 miles.

drain intervals, extend dry preventive maintenance an

at 24,000 mile oil drain intervals. We thought we took a great big leap when we went to 48,000. And it was with the help of the whole CITGO tean

that we were able to extend that to where we're





#### CITGARD Can Grow with Your Fleet and its Diverse Needs

306 views • 8 months ago

▲ CITGO Lubricants

Foodliner/Quest Liner relies on CITGARD for improved engine protection and performance

4K

### **Questions?**



Please post your questions using the Q&A function.



# **Contact LubeAlert**

855-820-9561

Open Monday to Friday
Until 7 PM Eastern

custserv@eoilreports.com











### **Future Webinars**

July 28: CITGARD® On Road

**August 25:** CITGARD Off Road including Heavy Duty Grease

September 22: Clarion ® Food Grade

October 20: Steel Industry Portfolio

**December 1:** Grease Fundamentals





### Thank You!

See you next time!

