LubeAlert Introduction 2022

The webinar will begin in less than 10 minutes.

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POLARIS Laboratories

LubeAlert Introduction 2022

The webinar will begin in less than 5 minutes.

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POLARIS Laboratories

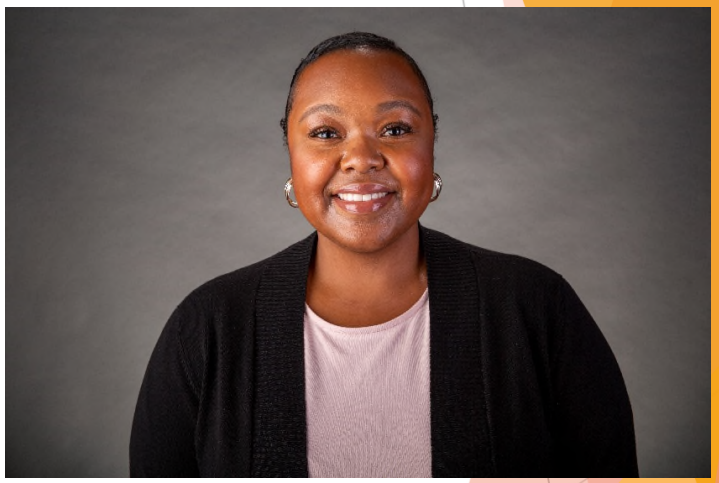
LubeAlert Introduction 2022

powered by:

POLARIS Laboratories

Erica McDonald

- CITGO Lubricants Sr. Product Specialist
- BS, Integrative Biology with Minor in Chemistry
- 10 Years in the Lubricants Industry, including extensive experience at the CITGO Cicero Lab
- LubeAlert Fluid Condition Monitoring Program Support



Haley Dotts/POLARIS LABORATORIES

HALEY DOTTS
ACCOUNT MANAGER

- POLARIS Labs® Account Manager
- POLARIS Labs® Customer Service experience

TODAY'S PRESENTER (TBC for Citgo's Program)
JULIO ACOSTA / POLARIS LABORATORIES®

Julio Acosta

Technical Business Consultant

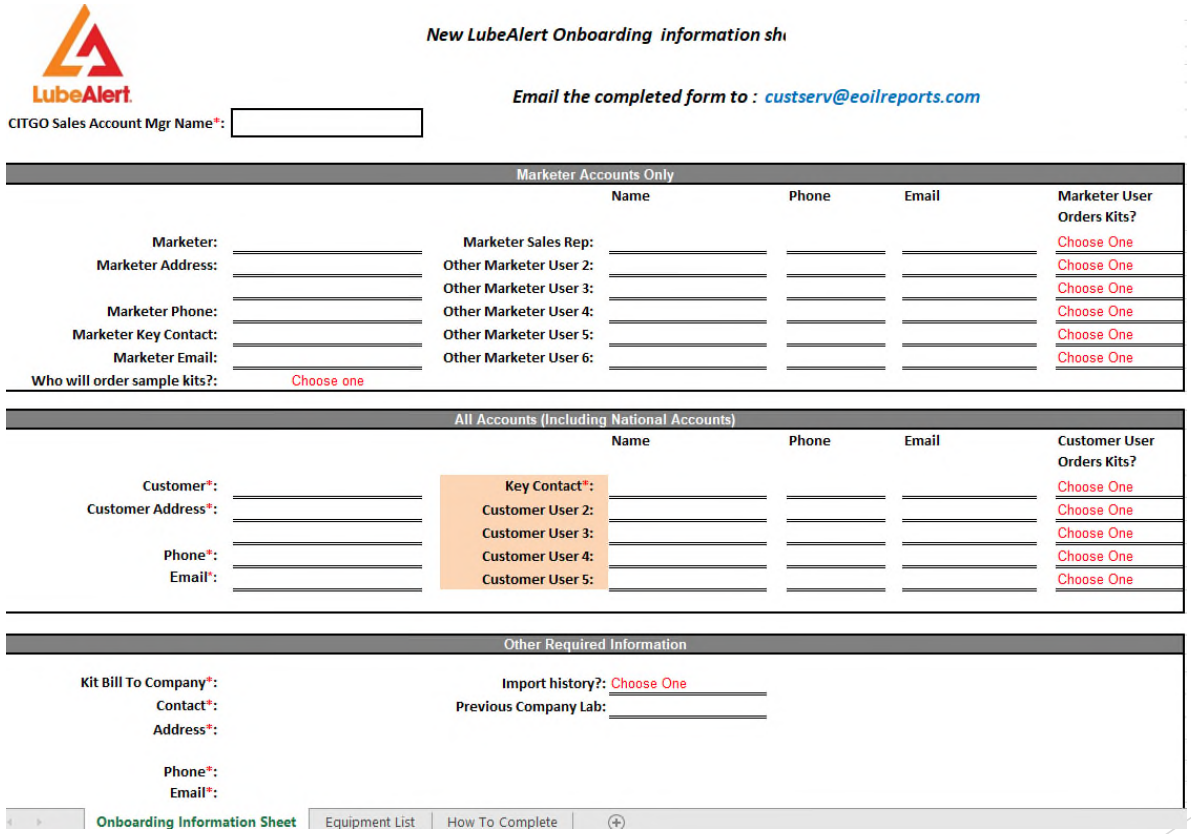
POLARIS Laboratories

Industry Experience

- BS in Mechanical Engineering from University of Houston
- MBA from University of Houston
- Lubricant sales, distribution
- Mining, automotive, construction, fleet maintenance
- Field engineering and laboratory operations at BP
- Supply chain management, business analyst and account services at Shell Oil
- OMA I certified by STLE and MLA II certified by ICML

LubeAlert

New LubeAlert Account Access



LubeAlert

New LubeAlert Onboarding information sh

Email the completed form to : custserv@eoilreports.com

CITGO Sales Account Mgr Name*:

Marketer Accounts Only

			Name	Phone	Email	Marketer User Orders Kits?
Marketer:		Marketer Sales Rep:				Choose One
Marketer Address:		Other Marketer User 2:				Choose One
		Other Marketer User 3:				Choose One
Marketer Phone:		Other Marketer User 4:				Choose One
Marketer Key Contact:		Other Marketer User 5:				Choose One
Marketer Email:		Other Marketer User 6:				Choose One
Who will order sample kits?:	Choose one					

All Accounts (Including National Accounts)

			Name	Phone	Email	Customer User Orders Kits?
Customer*:		Key Contact*:				Choose One
Customer Address*:		Customer User 2:				Choose One
		Customer User 3:				Choose One
Phone*:		Customer User 4:				Choose One
Email*:		Customer User 5:				Choose One

Other Required Information

Kit Bill To Company*:
Contact*:
Address*:

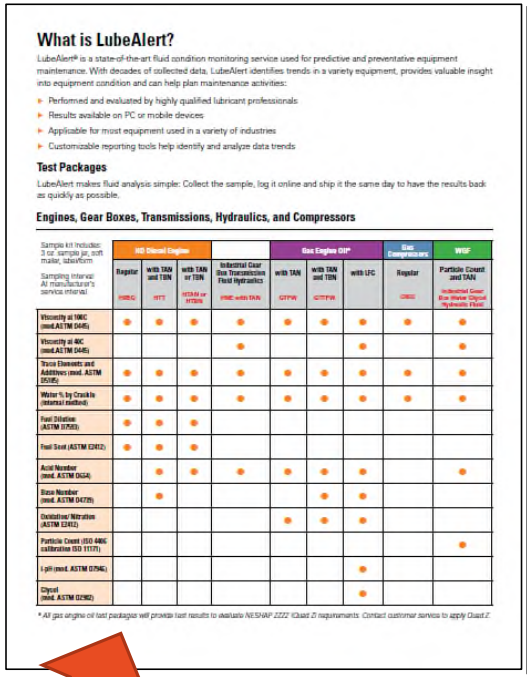
Phone*:
Email*:

Import history?: Choose One
Previous Company Lab:

Onboarding Information Sheet | Equipment List | How To Complete

LubeAlert

LubeAlert® User Guide



What is LubeAlert?

LubeAlert® is a state-of-the-art fluid condition monitoring service used for predictive and preventative equipment maintenance. With decades of collected data, LubeAlert identifies trends in a variety equipment, provides valuable insight into equipment condition and can help plan maintenance activities:

- Performed and evaluated by highly qualified lubricant professionals
- Results available on PC or mobile devices
- Applicable for most equipment used in a variety of industries
- Customizable reporting tools help identify and analyze data trends

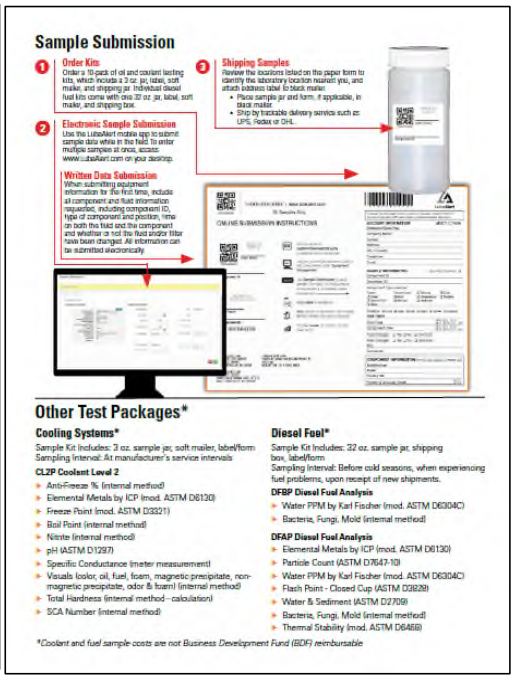
Test Packages

LubeAlert makes fluid analysis simple: Collect the sample, log it online and ship it the same day to have the results back as quickly as possible.

Engines, Gear Boxes, Transmissions, Hydraulics, and Compressors

Sample kit includes: 3 oz. sample jar, soft mailer, label/form Sampling interval: At manufacturer's service interval	HD Diesel Engine			Industrial Gear Box Transmission Fluid Hydraulics	Gas Engine Oil*			Gas Compressors	WGF
	Regular	with TAN and TBN	with TAN or TBN		with TAN	with TAN and TBN	with LFC	Regular	Particle Count and TAN
Viscosity at 100C (mod.ASTM D445)	●	●	●	●	●	●	●	●	●
Viscosity at 40C (mod.ASTM D445)				●			●		●
Trace Elements and Additives (mod. ASTM D5185)	●	●	●	●	●	●	●	●	●
Water % by Crackin (internal method)	●	●	●	●	●	●	●	●	●
Fuel Dilution (ASTM D7593)	●	●	●						
Foot Soot (ASTM D2412)	●	●	●						
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 D7945)							●		
Glycol (mod. ASTM D2982)							●		

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



Sample Submission

1 Order Kits
Order a 10-pack of oil and coolant testing kits, which include a 3 oz. jar, label, soft mailer, and shipping jar. Individual diesel fuel kits come with one 32 oz. jar, label, soft mailer, and shipping box.

2 Electronic Sample Submission
Use the LubeAlert mobile app to submit sample data while in the field. To enter multiple samples at once, access www.LubeAlert.com on your desktop.

Written Data Submission
When submitting equipment information for the first time, include all component and fluid information requested, including component ID, type of component and position, time on both the fluid and the component and whether or not the fluid and/or filter have been changed. All information can be submitted electronically.

3 Shipping Samples
Review the locations listed on the paper form to identify the laboratory location nearest you, and attach address label to black mailer.
- Place sample jar and form, if applicable, in black mailer.
- Ship by trackable delivery service such as UPS, Fedex or DHL.

Other Test Packages*

Cooling Systems*

Sample Kit Includes: 2 oz. sample jar, soft mailer, label/form
Sampling Interval: At manufacturer's service intervals

CL2P Coolant Level 2
- Anti-Freeze % (internal method)
- Elemental Metals by ICP (mod. ASTM D6130)
- Freeze Point (mod. ASTM D3321)
- Boil Point (internal method)
- Nitrite (internal method)
- pH (ASTM D1287)
- Specific Conductance (meter measurement)
- Visuals (color, oil, fuel, foam, magnetic precipitate, non-magnetic precipitate, odor & foam) (internal method)
- Total Hardness (internal method - calculation)
- SCA Number (internal method)

Diesel Fuel*

Sample Kit Includes: 32 oz. sample jar, shipping box, label/form
Sampling Interval: Before cold seasons, when experiencing fuel problems, upon receipt of new shipments.

DFBP Diesel Fuel Analysis
- Water PPM by Karl Fischer (mod. ASTM D6304C)
- Bacteria, Fungi, Mold (internal method)

DFAP Diesel Fuel Analysis
- Elemental Metals by ICP (mod. ASTM D6130)
- Particle Count (ASTM D7647-10)
- Water PPM by Karl Fischer (mod. ASTM D6304C)
- Flash Point - Closed Cup (ASTM D3828)
- Water & Sediment (ASTM D2709)
- Bacteria, Fungi, Mold (internal method)
- Thermal Stability (mod. ASTM D6468)

*Coolant and fuel sample costs are not Business Development Fund (BDF) reimbursable

Managing Preventive Maintenance

LubeAlert Analysis results are accessible via HORIZON®, a web-based data management application designed to help you manage your data and your sample program efficiently and effectively. Using this system, results are available almost immediately after sample processing is complete. LubeAlert Management Reports stretch the user's fluid analysis dollar by providing information that can affect significant change in everyday maintenance practices by:

- Keeping sampling schedules on track
- Identifying bottlenecks in turnaround time
- Influencing future equipment purchasing decisions
- Monitoring submitted samples online
- Graphing results to quickly pinpoint trends

To download the latest information and resources, go online to www.lubealert.com/newlubealert

Laboratory Locations

Send your samples to the laboratory location nearest you.

Edmonton
5140 75th Street
Edmonton, Alberta Canada T6E 6W2

Salt Lake City
3060 W. California Avenue
Suite B
Salt Lake City, UT 84104

Houston
10910 W. Sam Houston Pkwy. N. Suite 700
Houston, TX 77064-6214

Indianapolis
7451 Winton Drive
Indianapolis, IN 46268

Guatemala
Calzada Atanasio Tzul 22-00 zona 12, 01012
Centro Empresarial El Cortijo II, Oficobodega 319
Guatemala City, Guatemala

SUPPORT
Call: 855-820-8561 | 317-210-5181
Email: customerservice@oilreports.com

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LEARN MORE ABOUT OUR LUBEALERT SOLUTIONS:

DOWNLOAD THE LUBEALERT FLYER | LUBEALERT FAQS

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LubeAlert® TEST PACKAGES

Engines, Gear Boxes, Transmissions, Hydraulics, and Compressors

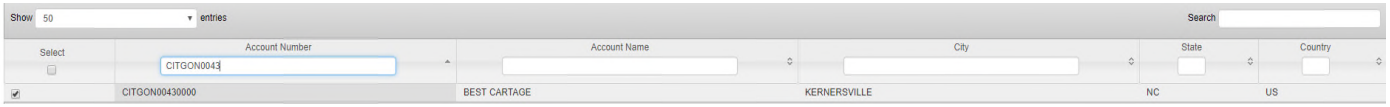
Sample kit Includes: 3 oz. sample jar, soft mailer, label/form

Sampling Interval: At manufacturer's service interval.

	HD Diesel Engine				Gas Engine Oil*			Gas Compressors	WGF
	Regular HREG	with TAN and TBN HTT	with TAN or TBN HTAN or HTBN	Industrial Gear Box Transmission Fluid Hydraulics HNE with TAN	with TAN GTPW	with TAN and TBN GTTPW	with LFG	Regular GREG	Particle Count and TAN 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)							●		

LubeAlert

Get The Reports To The Right People



CITGON

Digits 1-6:
CITGO LubeAlert

0987

Digits 7-10:
End-User (YYYY)

0011

Digits 11-14:
Location/Site (LLLL)

LubeAlert

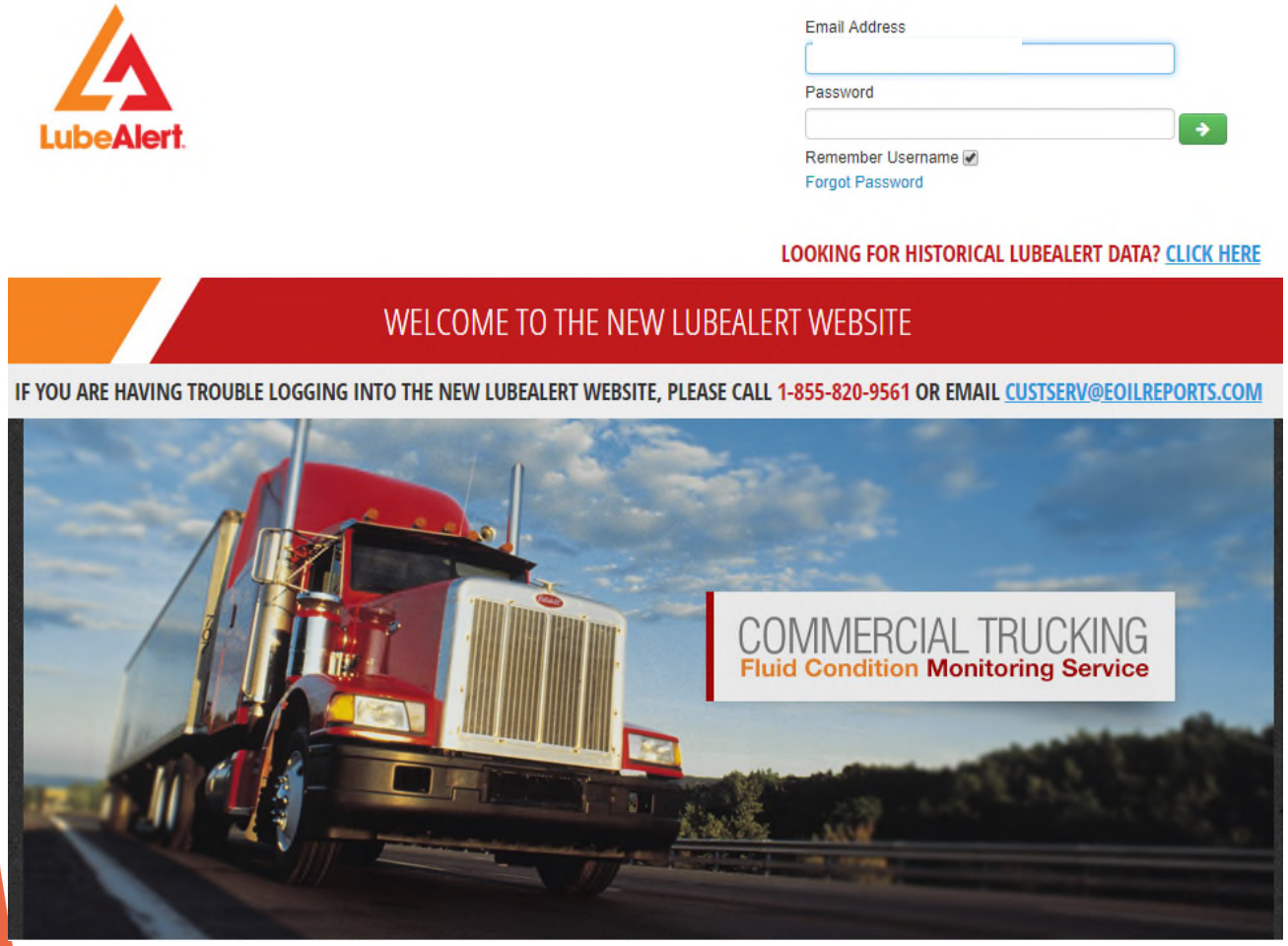
LubeAlert® BENEFITS

- Increase Operational Efficiency and Production
- Decrease Maintenance Costs
- Decrease Unexpected Downtime
- Optimize Lubricant Useable Life
- Increase Equipment Resale Value
- Track Equipment Condition Trends

LubeAlert
Web-Based Software

LubeAlert® Login

(www.lubealert.com)



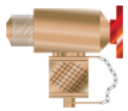
LubeAlert® DASHBOARD

TAKING & SUBMITTING SAMPLES

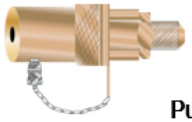
LubeAlert® KITS

How to Take an Oil Sample / Technical Library

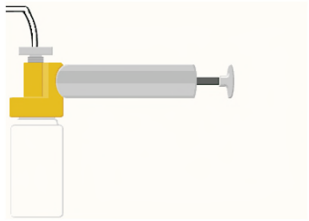
- ❑ Drain Catch Method
- ❑ Vacuum Pump Method
- ❑ Sample Valve Methods
  - ➢ Push Button
  - ➢ Push Pin (Needle Probe)

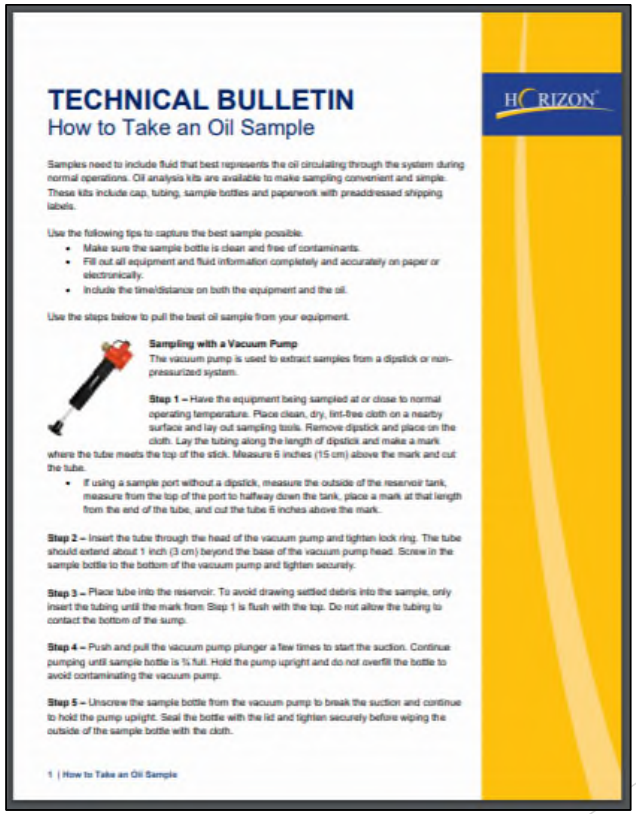


Push Button



Push Pin





TECHNICAL BULLETIN

How to Take an Oil Sample

HORIZON

Samples need to include fluid that best represents the oil circulating through the system during normal operations. Oil analysis kits are available to make sampling convenient and simple. These kits include cap, tubing, sample bottles and paperwork with preaddressed shipping labels.

Use the following tips to capture the best sample possible.

- Make sure the sample bottle is clean and free of contaminants.
- Fill out all equipment and fluid information completely and accurately on paper or electronically.
- Include the time/distance on both the equipment and the oil.

Use the steps below to pull the best oil sample from your equipment.

Sampling with a Vacuum Pump

The vacuum pump is used to extract samples from a dipstick or non-pressurized system.

Step 1 – Have the equipment being sampled at or close to normal operating temperature. Place clean, dry, lint-free cloth on a nearby surface and lay out sampling tools. Remove dipstick and place on the cloth. Lay the tubing along the length of dipstick and make a mark where the tube meets the top of the stick. Measure 6 inches (15 cm) above the mark and cut the tube.

- If using a sample port without a dipstick, measure the outside of the reservoir tank, measure from the top of the port to halfway down the tank, place a mark at that length from the end of the tube, and cut the tube 6 inches above the mark.

Step 2 – Insert the tube through the head of the vacuum pump and tighten lock ring. The tube should extend about 1 inch (3 cm) beyond the base of the vacuum pump head. Screw in the sample bottle to the bottom of the vacuum pump and tighten securely.

Step 3 – Place tube into the reservoir. To avoid drawing settled debris into the sample, only insert the tubing until the mark from Step 1 is flush with the top. Do not allow the tubing to contact the bottom of the sump.

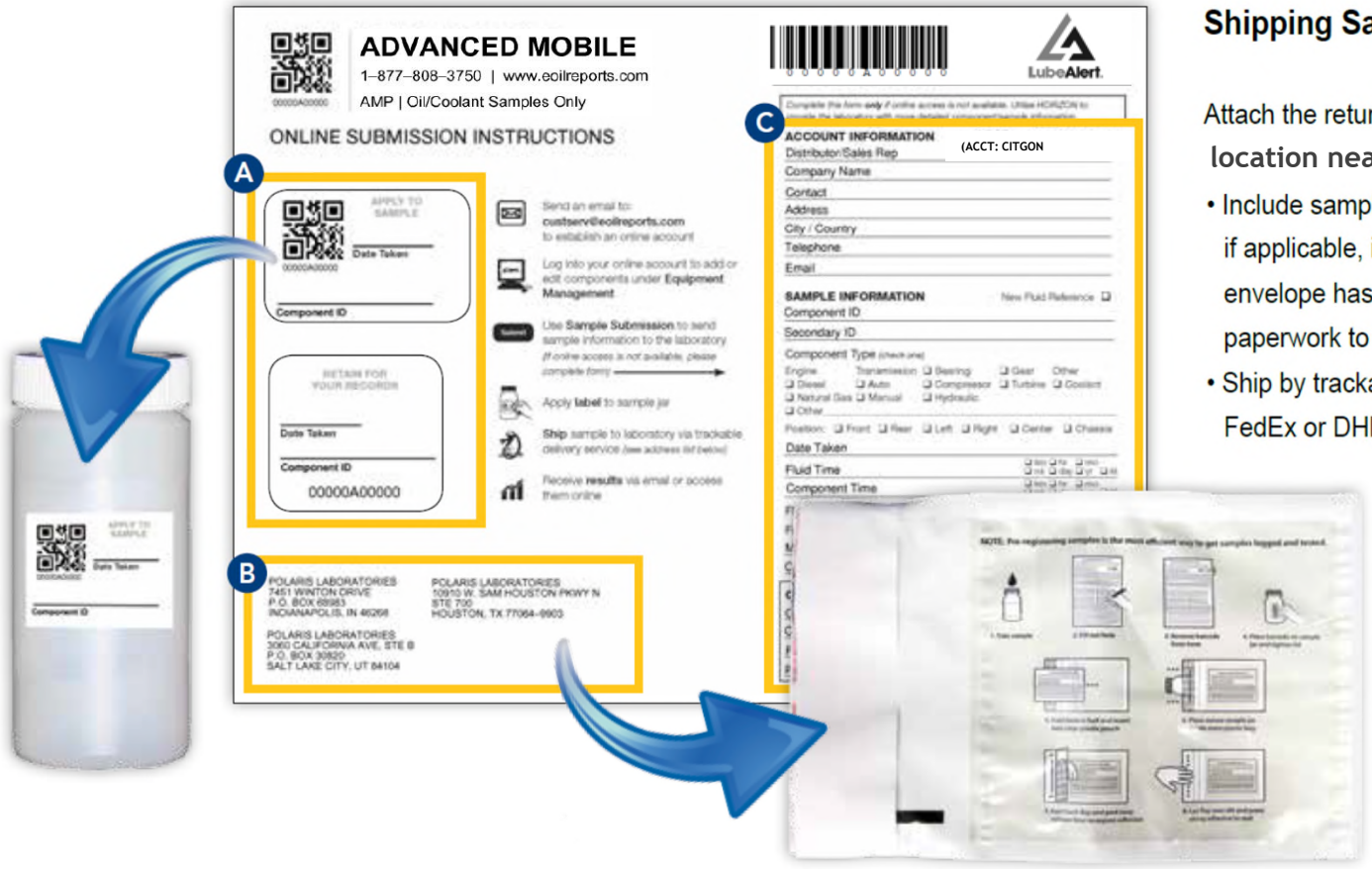
Step 4 – Push and pull the vacuum pump plunger a few times to start the suction. Continue pumping until sample bottle is ¾ full. Hold the pump upright and do not overfill the bottle to avoid contaminating the vacuum pump.

Step 5 – Unscrew the sample bottle from the vacuum pump to break the suction and continue to hold the pump upright. Seal the bottle with the lid and tighten securely before wiping the outside of the sample bottle with the cloth.

LubeAlert

SUBMITTING YOUR LUBRICANT, COOLANT AND FUEL SAMPLES

SAMPLE INFORMATION & COMPONENT REGISTRATION FORMS



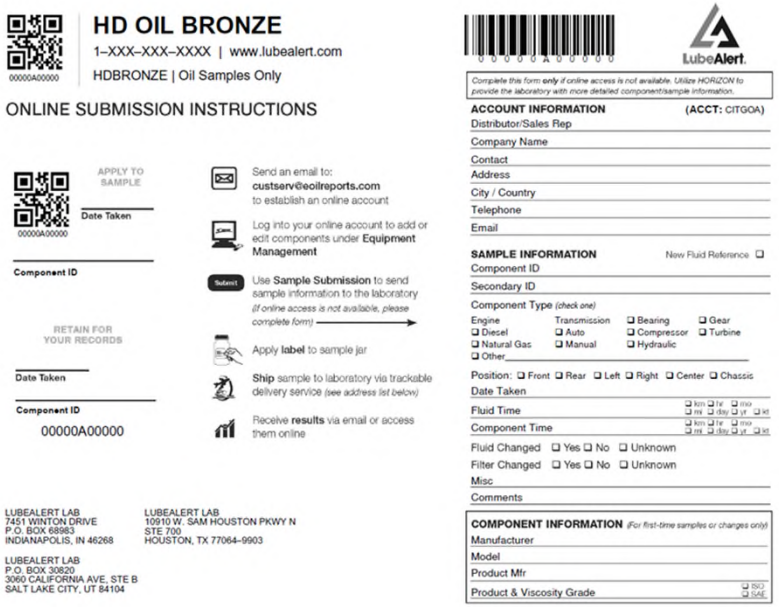
Shipping Samples

Attach the return address label for the laboratory location nearest you to the plastic envelope.

- Include sample jar and sample information form, if applicable, in soft plastic envelope. (Note: the envelope has a special pouch for the sample paperwork to keep is safe from leaks during transit.)
- Ship by trackable delivery service such as UPS, FedEx or DHL.

How to Use the EZ Label

- EZ label is small, convenient and easy to use
- Combined with online sample submission, this label reduces paperwork, minimizes errors and moves your samples to the laboratory floor quicker



HD OIL BRONZE
1–XXX–XXX–XXXX | www.lubealert.com
HDBRONZE | Oil Samples Only

ONLINE SUBMISSION INSTRUCTIONS

APPLY TO SAMPLE
Date Taken
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 them online

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

LUBEALERT LAB
10910 W. SAM HOUSTON PKWY N
STE 700
HOUSTON, TX 77064–9903

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

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*Complete this form **only** if online access is not available. Utilize HORIZON to provide the laboratory with more detailed component/sample information.*

ACCOUNT INFORMATION (ACCT: CITGOA)
Distributor/Sales Rep
Company Name
Contact
Address
City / Country
Telephone
Email

SAMPLE INFORMATION New Fluid Reference ❑
Component ID
Secondary ID
Component Type *(check one)*
Engine ❑ Diesel ❑ Natural Gas ❑ Other
Transmission ❑ Auto ❑ Manual
❑ Bearing ❑ Compressor ❑ Hydraulic
❑ Gear ❑ Turbine
Position: ❑ Front ❑ Rear ❑ Left ❑ Right ❑ Center ❑ Chassis
Date Taken
Fluid Time
Component Time
Fluid Changed ❑ Yes ❑ No ❑ Unknown
Filter Changed ❑ Yes ❑ No ❑ Unknown
Misc
Comments

COMPONENT INFORMATION *(For first-time samples or changes only)*
Manufacturer
Model
Product Mfr
Product & Viscosity Grade ❑ ISO ❑ SAE

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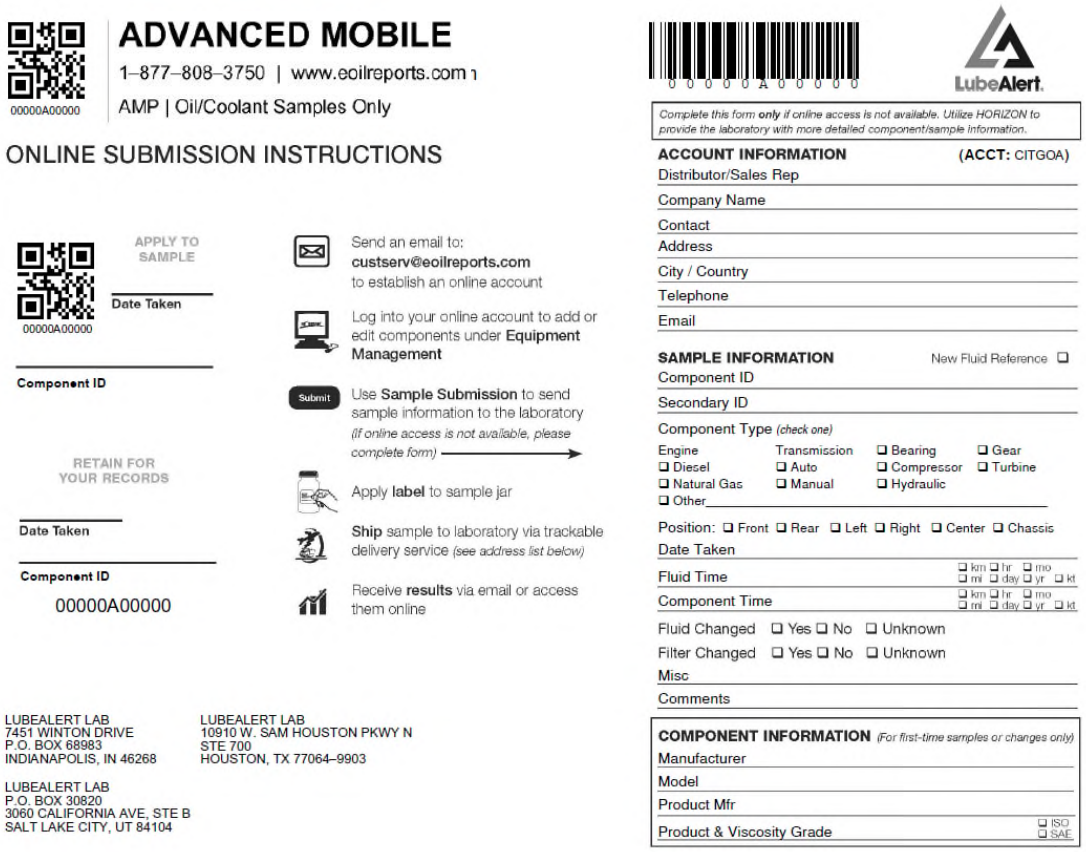
LubeAlert® CITGO EZ LABEL



ADVANCED MOBILE

1–877–808–3750 | www.eoilreports.com

AMP | Oil/Coolant Samples Only

00000A00000

ONLINE SUBMISSION INSTRUCTIONS

APPLY TO SAMPLE

Date Taken

00000A00000

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**

Submit — 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 them online

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

LUBEALERT LAB
10910 W. SAM HOUSTON PKWY N
STE 700
HOUSTON, TX 77064–9903

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

0 0 0 0 0 A 0 0 0 0 0

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*Complete this form **only** if online access is not available. Utilize HORIZON to provide the laboratory with more detailed component/sample information.*

ACCOUNT INFORMATION (ACCT: CITGOA)

Distributor/Sales Rep

Company Name

Contact

Address

City / Country

Telephone

Email

SAMPLE INFORMATION New Fluid Reference ❑

Component ID

Secondary ID

Component Type *(check one)*

Engine ❑ Diesel ❑ Natural Gas ❑ Other
Transmission ❑ Auto ❑ Manual
❑ Bearing ❑ Compressor ❑ Hydraulic
❑ Gear ❑ Turbine

Position: ❑ Front ❑ Rear ❑ Left ❑ Right ❑ Center ❑ Chassis

Date Taken

Fluid Time ❑ km ❑ hr ❑ mo ❑ mi ❑ day ❑ yr ❑ kt

Component Time ❑ km ❑ hr ❑ mo ❑ mi ❑ day ❑ yr ❑ kt

Fluid Changed ❑ Yes ❑ No ❑ Unknown

Filter Changed ❑ Yes ❑ No ❑ Unknown

Misc

Comments

COMPONENT INFORMATION *(For first-time samples or changes only)*

Manufacturer

Model

Product Mfr

Product & Viscosity Grade ❑ ISO ❑ SAE

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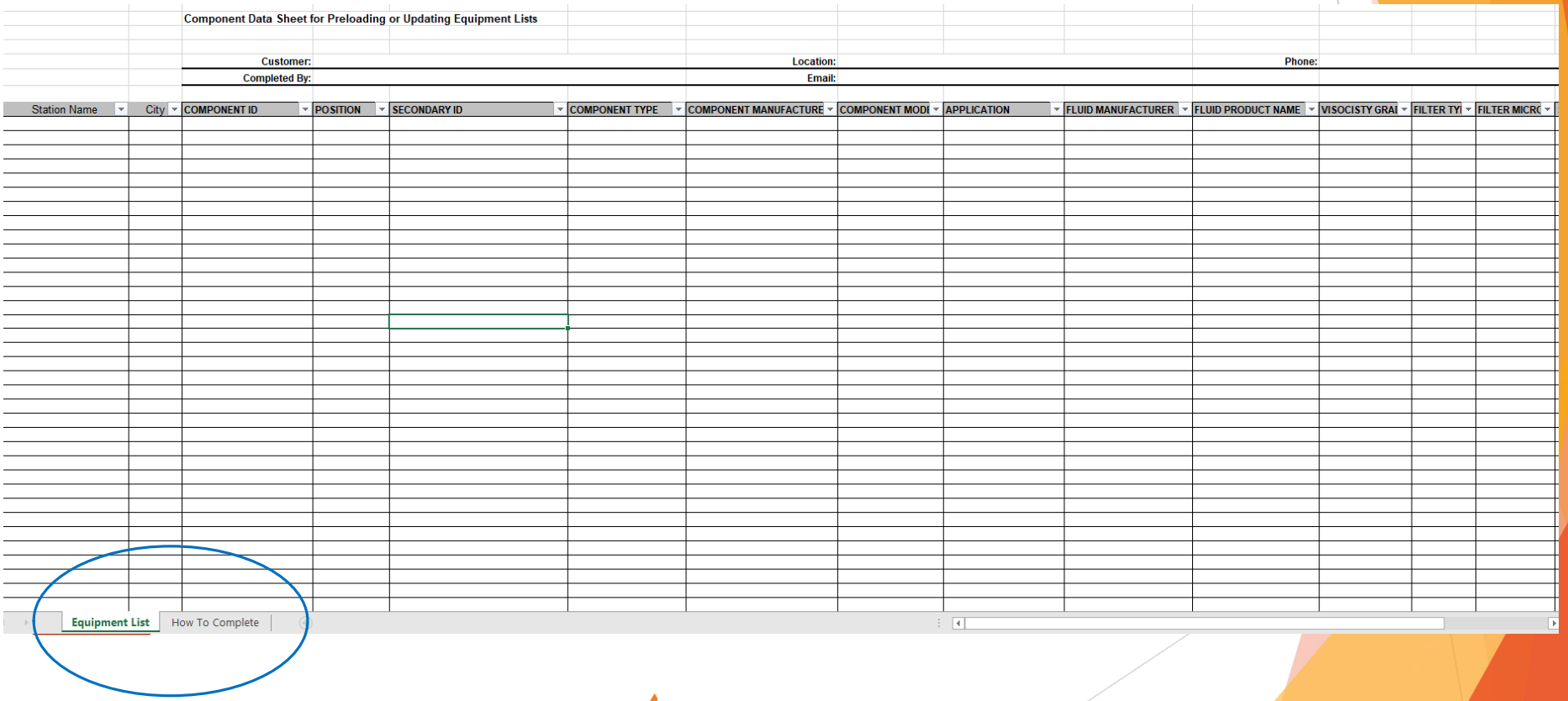
LubeAlert® EQUIPMENT REGISTRATION



Component Data Sheet for Preloading or Updating Equipment Lists

Customer: Location: Phone:

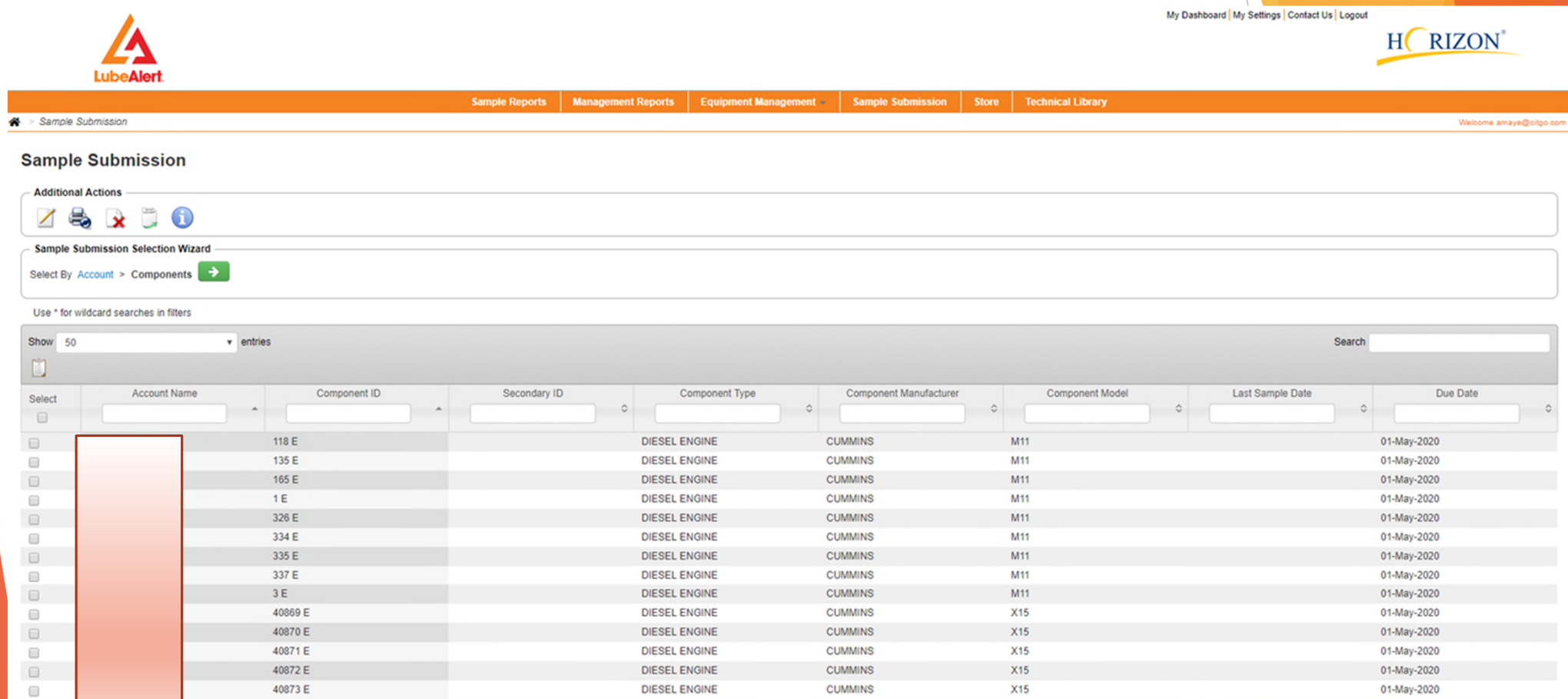
Completed By: Email:

Station Name	City	COMPONENT ID	POSITION	SECONDARY ID	COMPONENT TYPE	COMPONENT MANUFACTURE	COMPONENT MODI	APPLICATION	FLUID MANUFACTURER	FLUID PRODUCT NAME	VISOCISTY GRAI	FILTER TYI	FILTER MICRO

Equipment List | How To Complete

LubeAlert

LubeAlert® EQUIPMENT LIST



Select	Account Name	Component ID	Secondary ID	Component Type	Component Manufacturer	Component Model	Last Sample Date	Due Date
		118 E		DIESEL ENGINE	CUMMINS	M11		01-May-2020
		135 E		DIESEL ENGINE	CUMMINS	M11		01-May-2020
		165 E		DIESEL ENGINE	CUMMINS	M11		01-May-2020
		1 E		DIESEL ENGINE	CUMMINS	M11		01-May-2020
		326 E		DIESEL ENGINE	CUMMINS	M11		01-May-2020
		334 E		DIESEL ENGINE	CUMMINS	M11		01-May-2020
		335 E		DIESEL ENGINE	CUMMINS	M11		01-May-2020
		337 E		DIESEL ENGINE	CUMMINS	M11		01-May-2020
		3 E		DIESEL ENGINE	CUMMINS	M11		01-May-2020
		40869 E		DIESEL ENGINE	CUMMINS	X15		01-May-2020
		40870 E		DIESEL ENGINE	CUMMINS	X15		01-May-2020
		40871 E		DIESEL ENGINE	CUMMINS	X15		01-May-2020
		40872 E		DIESEL ENGINE	CUMMINS	X15		01-May-2020
		40873 E		DIESEL ENGINE	CUMMINS	X15		01-May-2020

DRIVING EFFICIENCIES TOGETHER
COMPONENT TAGS SIMPLIFY SUBMISSION

Print QR codes directly from HORIZON®

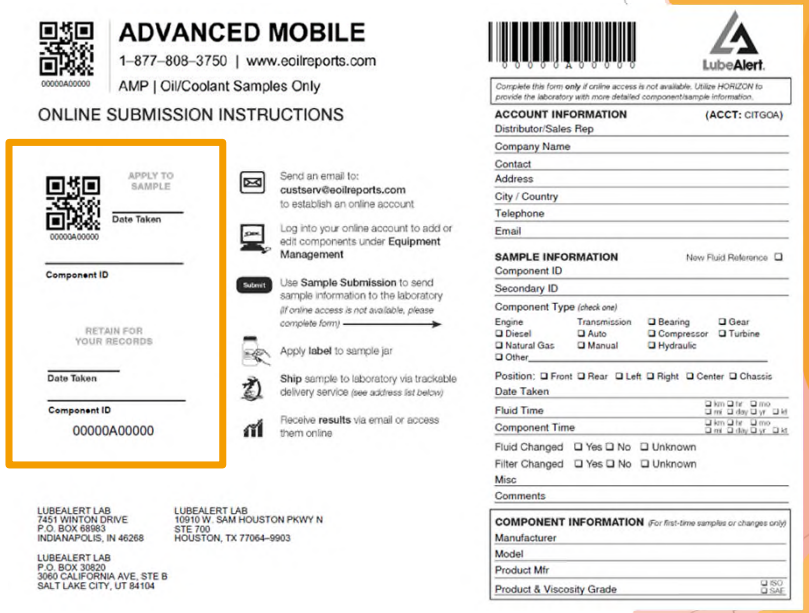
- Save Time
- Save Labor
- Save Costs

LubeAlert

GREEN INITIATIVE

ABOUT GREEN 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. Starting in July, as part of our green initiative to help protect the planet, customers will 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.



ADVANCED MOBILE
1-877-808-3750 | www.oilreports.com
AMP | Oil/Coolant Samples Only
ONLINE SUBMISSION INSTRUCTIONS

APPLY TO SAMPLE
Date Taken
Component ID
RETAIN FOR YOUR RECORDS
Date Taken
Component ID
00000A00000

Send an email to: custserv@oilreports.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 them online

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

LUBEALERT LAB
10910 W. SAM HOUSTON PKWY N
STE 700
HOUSTON, TX 77064-9903

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

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*Complete this form **only** if online access is not available. Utilize HORIZON to provide the laboratory with more detailed component/sample information.*

ACCOUNT INFORMATION (ACCT: CITGOA)
Distributor/Sales Rep
Company Name
Contact
Address
City / Country
Telephone
Email

SAMPLE INFORMATION New Fluid Reference ❑
Component ID
Secondary ID
Component Type *(check one)*
Engine ❑ Diesel ❑ Natural Gas ❑ Other
Transmission ❑ Auto ❑ Manual
❑ Bearing ❑ Compressor ❑ Hydraulic
❑ Gear ❑ Turbine
Position: ❑ Front ❑ Rear ❑ Left ❑ Right ❑ Center ❑ Chassis
Date Taken
Fluid Time
Component Time
Fluid Changed ❑ Yes ❑ No ❑ Unknown
Filter Changed ❑ Yes ❑ No ❑ Unknown
Misc
Comments

COMPONENT INFORMATION *(For first-time samples or changes only)*
Manufacturer
Model
Product Mfr
Product & Viscosity Grade ❑ ISO ❑ SAE

Beginning July 1, 2022,
all orders for full-sized Sample Information Forms will be invoiced $0.10/label.

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DRIVING EFFICIENCIES TOGETHER
GREEN INITIATIVE

How to Use QR-Code-Only Sample Labels

What is a QR-Code-Only Sample Label?

The QR-code-only sample label is only the quick, convenient and easy-to-read QR code from the sample registration form. The individual sample bottle labels are made for online sample submission only and will arrive as a printed strip of labels (up to 10 per sheet) packed with your sample kits.

A unique barcode number for the sample is included under the QR code, alongside the prefilled account number and field to identify your component ID. This newly designed slim QR-code-only label fits precisely along the length of the sample bottle. Once affixed to the jar, proceed with scanning and submit the sample with the mobile app or online as you would normally.

Why Should I Use QR-Code-Only Labels?

Transitioning to QR-code-only sample labels will keep your sample kit costs to a minimum while curbing paper use and its environmental impact. Improving the laboratory and your company's carbon footprint has remained a continuous focus in our commitment to minimize and eliminate waste. More than 1.9 million sample labels are shipped worldwide annually and half of those paper forms go entirely unused.

Primary benefits of utilizing QR-code-only sample labels:

- Eliminate the need to handwrite sample information and prevents costly mistakes
- Improve operational efficiency and productivity
- Streamline sample registration at maintenance intervals, saving time
- Save costs and reduce carbon footprint
- Conserve inventory space and mitigate waste

Updating to the New Label

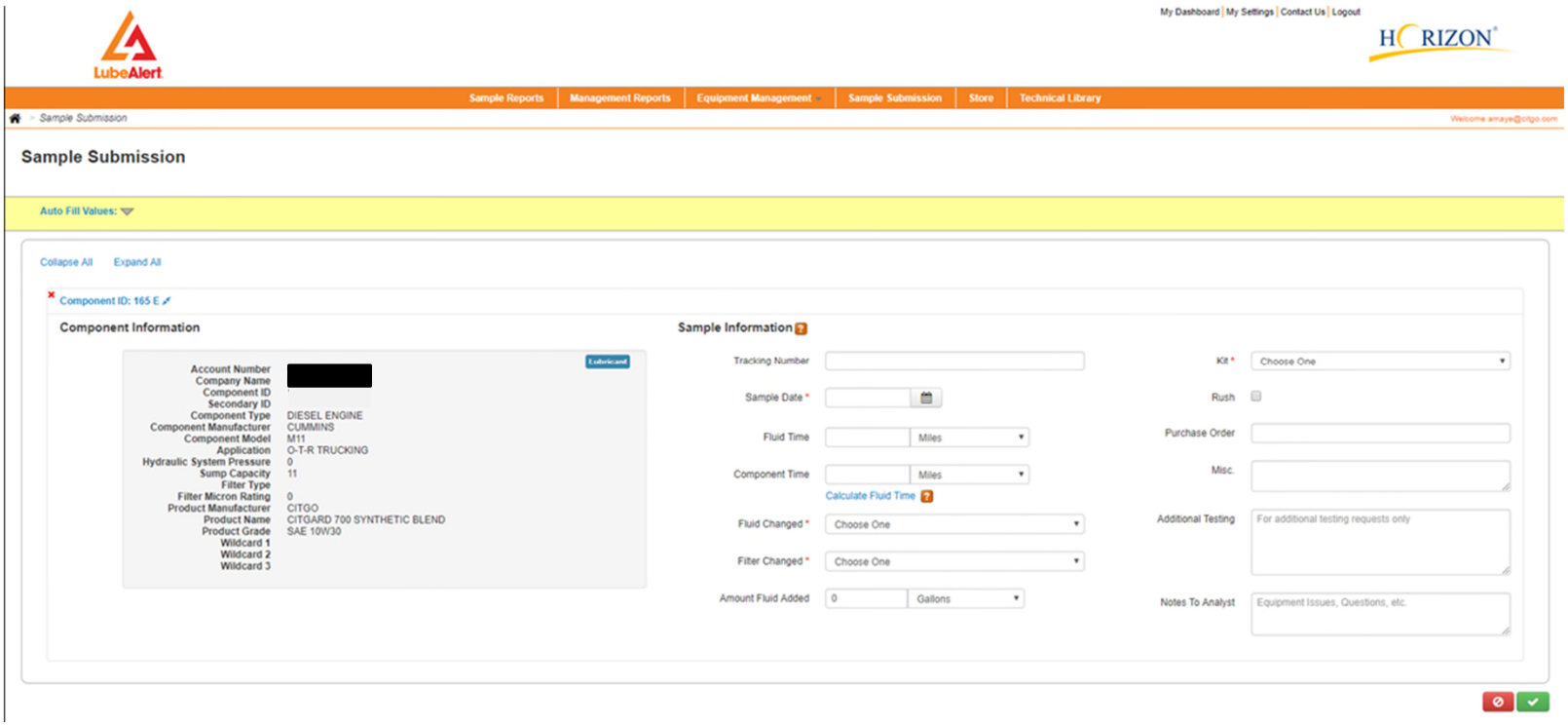
Before updating to the new label, be sure to:

- Notify all the relevant staff (sites, technicians, assistants, procurement and inventory managers)
- Hold training for field staff on proper label usage (if not already submitting samples electronically)

Making the switch to the new oil-resistant QR-code-only adhesive sample label is easy. Contact our customer experience team for more information.

LubeAlert

Online Submission



LubeAlert Reports - Benefits of the program

LubeAlert® REPORTING

Managing Preventive Maintenance

LubeAlert Analysis results are accessible via HORIZON®, a web-based data management application designed to help you manage your data and your program efficiently and effectively. Using this system, results are available almost immediately after sample processing is complete. HORIZON Management Reports stretch the user's fluid analysis dollar by providing information that can affect significant change in everyday maintenance practices by:

- Keeping sampling schedules on track
- Identifying bottlenecks in turnaround time
- Influencing future purchasing decisions
- Monitoring samples submitted online
- Graphing to quickly pinpoint trends

To download the latest information and resources, go online to LubeAlert.com.

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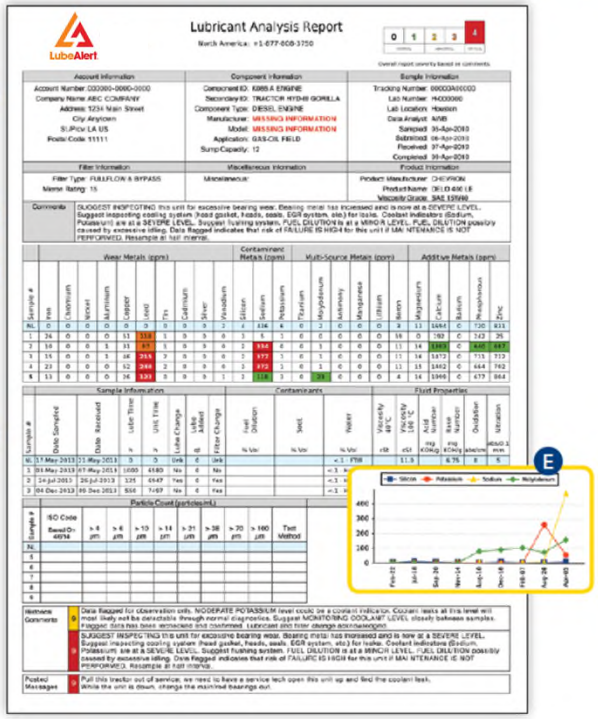
Reading a report

HOW TO READ A REPORT



A Sample and Component Information

The information submitted with a sample is as important to who is reading the report as it is to the analyst interpreting the test results and making recommendations. Properly document your equipment and share this knowledge with your laboratory. Review the documented component information to:

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

B Comments

A data analyst's job is to explain and, if necessary, recommend actions for rectifying significant changes in the fluid or the unit's condition. Reviewing comments before looking at the actual test results will provide a roadmap to the report's most important information. Any actions that need to be taken are listed first in order of severity. Justifications for recommending those actions immediately follow.

C Elemental Metals

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).

D Test Data

New lube results are listed first for a point of reference. Fluid analysis program test results are listed according to age of the sample – oldest to most recent, top to bottom – so trends are apparent. Significant changes are flagged and documented in the comments section of the report so you can address most critical issues first.

E Graphs

There are 10 customizable graphs available on every report that help you pinpoint developing trends. To ensure graphs are turned on for your account, log into HORIZON® and go to My Settings > Sample Report Display.

ONLINE TRAINING

HORIZON® online training is available on demand. Each video and bulletin will provide an overview of application best practices. To download the latest information and resources, go online to **www.oilreports.com/library.**

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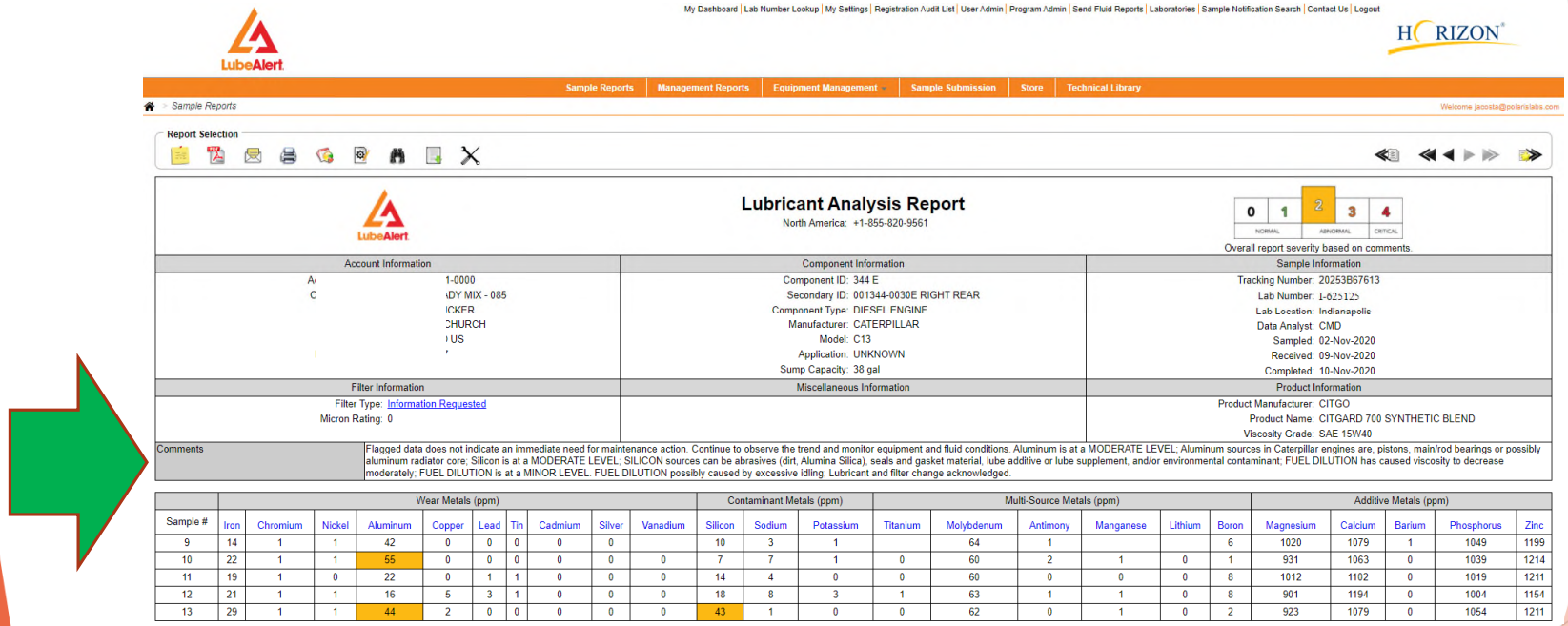
Easy to Read Reports with Precise Recommendations



My Dashboard | Lab Number Lookup | My Settings | Registration Audit List | User Admin | Program Admin | Send Fluid Reports | Laboratories | Sample Notification Search | Contact Us | Logout

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HORIZON

Sample Reports | Management Reports | Equipment Management | Sample Submission | Store | Technical Library

Sample Reports

Welcome jacosta@polarislabs.com

Report Selection

Lubricant Analysis Report

North America: +1-855-820-9561

0 1 2 3 4 (NORMAL / ABNORMAL / CRITICAL)

Overall report severity based on comments.

Account Information	Component Information	Sample Information
A 1-0000	Component ID: 344 E	Tracking Number: 20253B67613
C DY MIX - 085	Secondary ID: 001344-0030E RIGHT REAR	Lab Number: I-625125
CKER	Component Type: DIESEL ENGINE	Lab Location: Indianapolis
CHURCH	Manufacturer: CATERPILLAR	Data Analyst: CMD
US	Model: C13	Sampled: 02-Nov-2020
	Application: UNKNOWN	Received: 09-Nov-2020
	Sump Capacity: 38 gal	Completed: 10-Nov-2020
Filter Information	**Miscellaneous Information**	**Product Information**
Filter Type: Information Requested		Product Manufacturer: CITGO
Micron Rating: 0		Product Name: CITGARD 700 SYNTHETIC BLEND
		Viscosity Grade: SAE 15W40

Comments	Flagged data does not indicate an immediate need for maintenance action. Continue to observe the trend and monitor equipment and fluid conditions. Aluminum is at a MODERATE LEVEL; Aluminum sources in Caterpillar engines are, pistons, main/rod bearings or possibly aluminum radiator core; Silicon is at a MODERATE LEVEL; SILICON sources can be abrasives (dirt, Alumina Silica), seals and gasket material, lube additive or lube supplement, and/or environmental contaminant; FUEL DILUTION has caused viscosity to decrease moderately; FUEL DILUTION is at a MINOR LEVEL. FUEL DILUTION possibly caused by excessive idling; Lubricant and filter change acknowledged.

	Wear Metals (ppm)										Contaminant Metals (ppm)			Multi-Source Metals (ppm)						Additive Metals (ppm)				
Sample #	Iron	Chromium	Nickel	Aluminum	Copper	Lead	Tin	Cadmium	Silver	Vanadium	Silicon	Sodium	Potassium	Titanium	Molybdenum	Antimony	Manganese	Lithium	Boron	Magnesium	Calcium	Barium	Phosphorus	Zinc
9	14	1	1	42	0	0	0	0	0		10	3	1		64	1			6	1020	1079	1	1049	1199
10	22	1	1	55	0	0	0	0	0	0	7	7	1	0	60	2	1	0	1	931	1063	0	1039	1214
11	19	1	0	22	0	1	1	0	0	0	14	4	0	0	60	0	0	0	8	1012	1102	0	1019	1211
12	21	1	1	16	5	3	1	0	0	0	18	8	3	1	63	1	1	0	8	901	1194	0	1004	1154
13	29	1	1	44	2	0	0	0	0	0	43	1	0	0	62	0	1	0	2	923	1079	0	1054	1211

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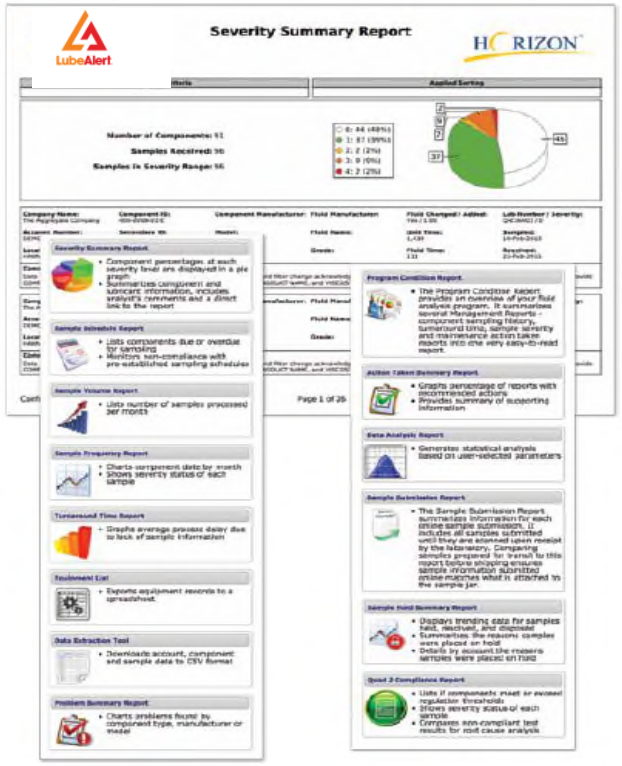
LubeAlert® MANAGEMENT REPORTS



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

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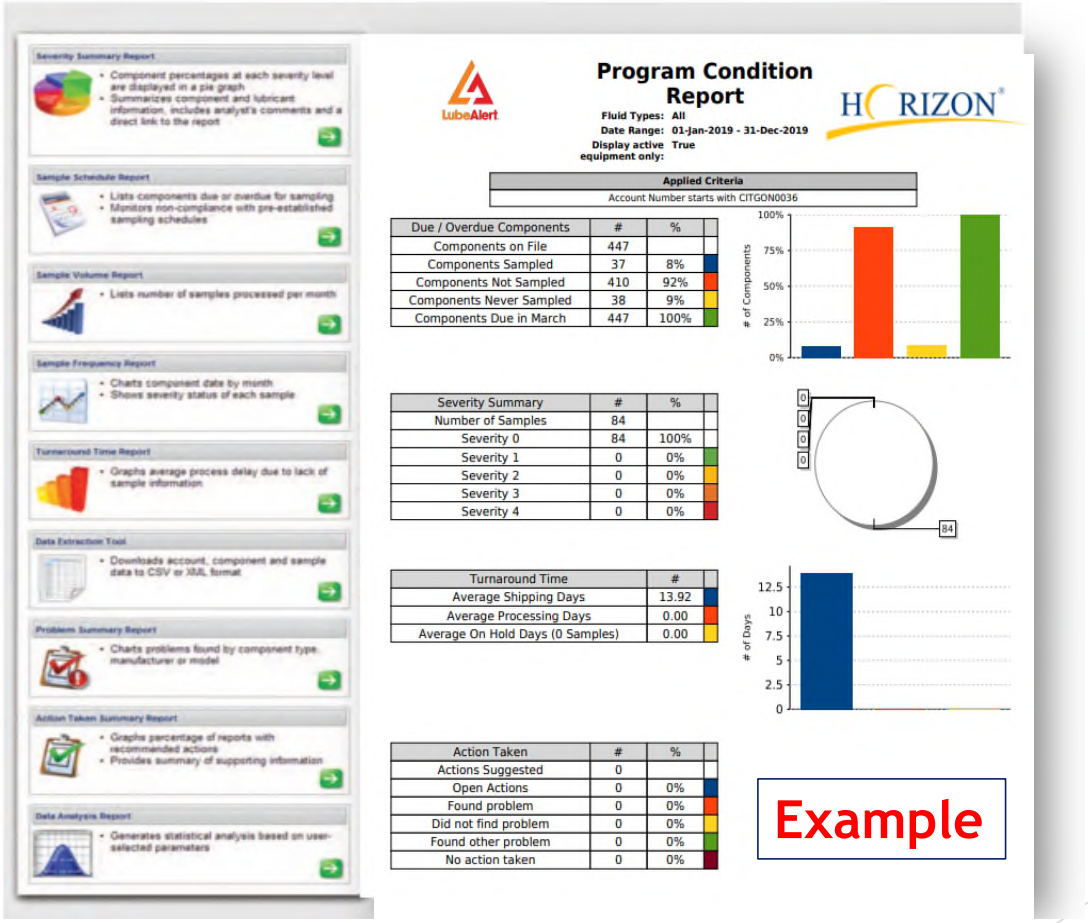
KEEP PROGRAM ON TRACK



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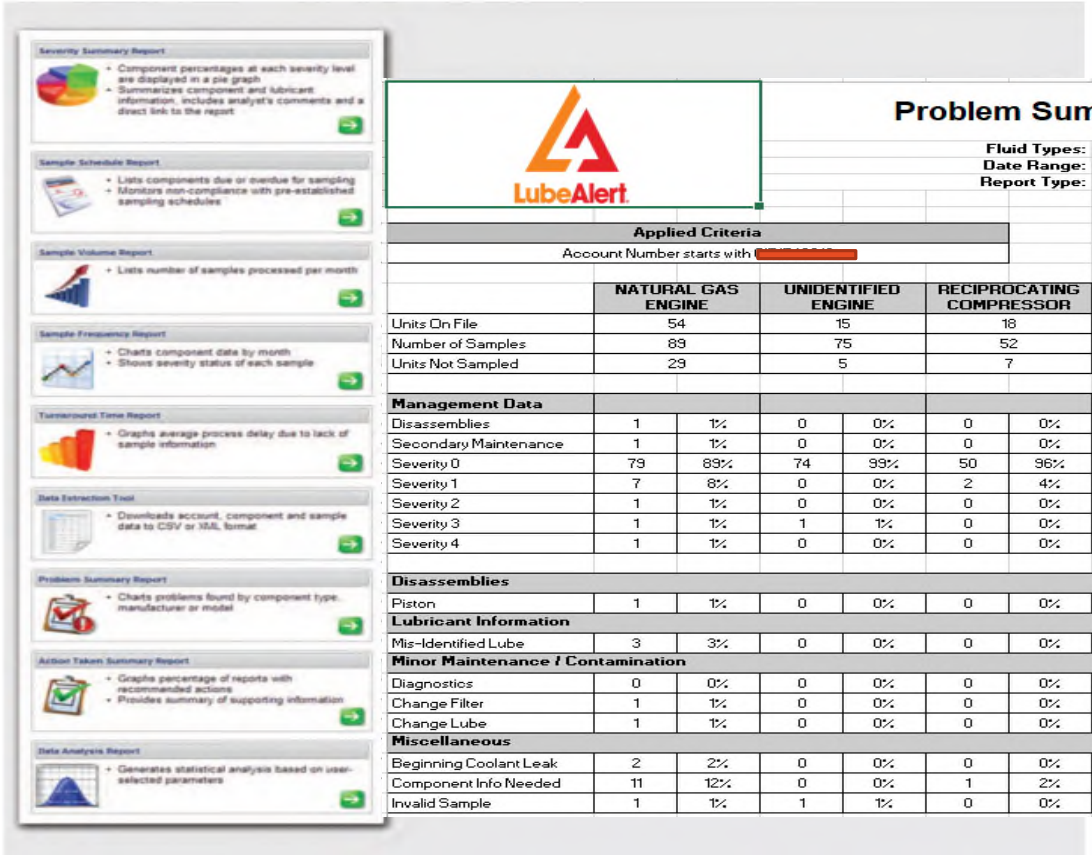
IDENTIFY BIGGEST PROBLEMS



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Problem Summary Report

HORIZON

Fluid Types: All
Date Range: 01-Jan-2019 - 31-Dec-2019
Report Type: Component Type

Applied Criteria
Account Number starts with [redacted]

	NATURAL GAS ENGINE		UNIDENTIFIED ENGINE		RECIPROCATING COMPRESSOR		HYDRAULIC		DIESEL ENGINE		COMPRESSOR		GAS TURBINE		Total	
Units On File	54		15		18		14		12		2		8		123	
Number of Samples	89		75		52		42		18		3		0		279	
Units Not Sampled	29		5		7		3		2		0		8		54	
Management Data															**Total**	
Disassemblies	1	1%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	1	0%
Secondary Maintenance	1	1%	0	0%	0	0%	0	0%	0	0%	1	33%	0	0%	2	1%
Severity 0	79	89%	74	99%	50	96%	42	100%	18	100%	2	67%	0	0%	265	95%
Severity 1	7	8%	0	0%	2	4%	0	0%	0	0%	0	0%	0	0%	9	3%
Severity 2	1	1%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	1	0%
Severity 3	1	1%	1	1%	0	0%	0	0%	0	0%	1	33%	0	0%	3	1%
Severity 4	1	1%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	1	0%
Disassemblies																
Piston	1	1%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	1	0%
Lubricant Information																
Mis-Identified Lube	3	3%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	3	1%
Minor Maintenance / Contamination																
Diagnostics	0	0%	0	0%	0	0%	0	0%	0	0%	1	33%	0	0%	1	0%
Change Filter	1	1%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	1	0%
Change Lube	1	1%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	1	0%
Miscellaneous																
Beginning Coolant Leak	2	2%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	2	1%
Component Info Needed	11	12%	0	0%	1	2%	0	0%	0	0%	0	0%	0	0%	12	4%
Invalid Sample	1	1%	1	1%	0	0%	0	0%	0	0%	0	0%	0	0%	2	1%

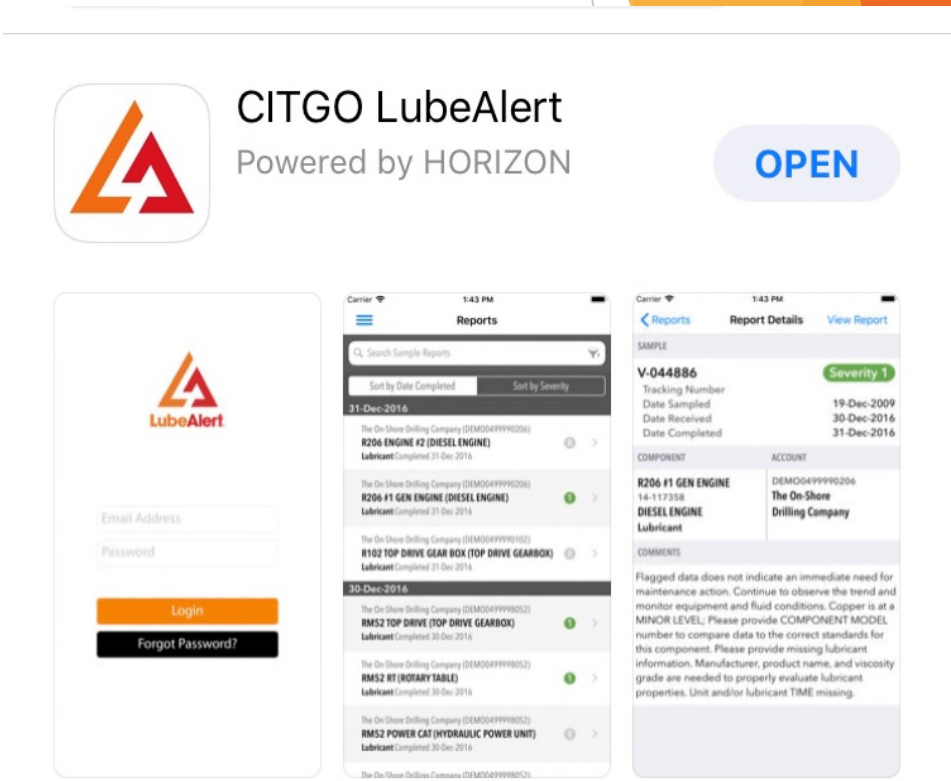
LubeAlert Mobile App

LubeAlert® MOBILE APP

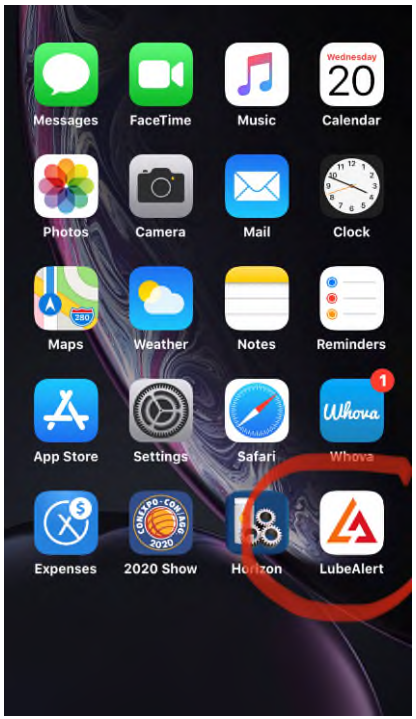
The Power of LubeAlert® Is at Your Fingertips

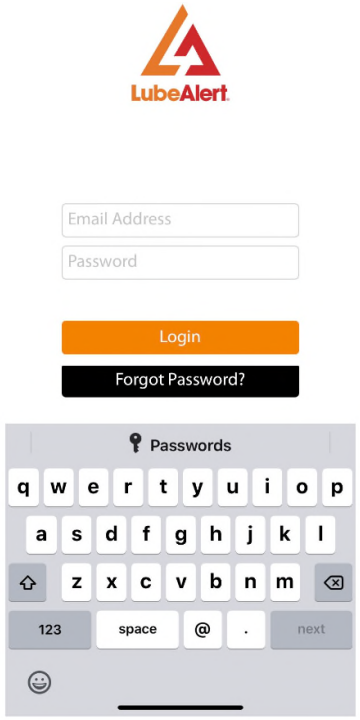
Take Action.
Anytime.
Anywhere.

Save five minutes per sample with electronic submission and report alerts



LubeAlert® MOBILE APP





SAMPLE SUBMISSION

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

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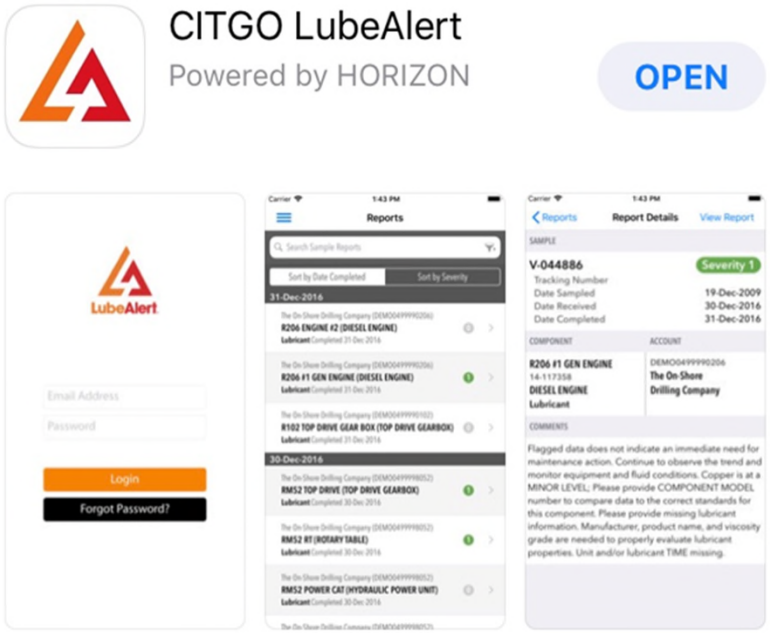
Mobile App – Fluid Analysis on the Go



The Power of LubeAlert Is At Your Fingertips

Take Action.

Anytime.

Anywhere.

Save five minutes per sample with electronic submission and report alerts

LubeAlert

Additional IT Resources

IT SOLUTIONS TO SAVE YOUR EQUIPMENT

HORIZON®

Mobile, customizable solution to manage your fluid analysis data with speed, flexibility and functionality

DATACONNECT

Maximize your ROI and quickly submit samples through an automatic import of all your HORIZON data into your own system

MAINTENANCE TRACKING

The ability to evaluate maintenance trends by tracking the causes of changes identified in test results

+1.317.808.3750 | www.polarislabs.com | getstarted@polarislabs.com

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DATACONNECT

DataConnect | *Your data, one location.*

POLARIS Laboratories

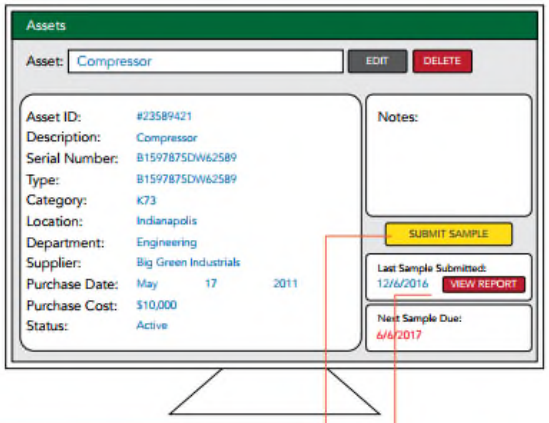
Do you have a bird's eye view of your maintenance program? If your fluid analysis data and general maintenance information live in different systems, your asset health can be difficult to monitor. Luckily, we've found a solution.

1. CONNECT

Connect your maintenance system with HORIZON®, our data management tool. Using DataConnect, you can automatically import all of your fluid analysis data into your maintenance system.

2. IMPLEMENT

You can save time and money by integrating HORIZON into your asset system. With everything in one place, you don't have to worry about retraining your team.



3. SAMPLE

Forget jumping from program to program. Submit your samples directly from your current maintenance system. Run reports, submit samples and review the results in one location.

4. MONITOR

Monitor and react to your results. View your fluid analysis results directly in your maintenance system. With all your information in one location, you can quickly respond to recommendations.

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MAINTENANCE TRACKING

Monitor Maintenance Services, Repairs and Rebuilds in HORIZON®

- See elevated wear particles as a result of break-in wear of new or rebuilt components
- Confirm your maintenance action corrected problem of high severity trending
- Quickly associate how oil changes impact testing results

3

	Sample Information							Corrosion Metals (ppm)								Contaminants (ppm)		Corrosion Inhibitors (ppm)				Carrier Salts (ppm/10)	
Sample #	Date Sampled	Date Received	Coolant Time	Unit Time	Coolant Change	SCA Added	Filter Change	Iron	Aluminum	Copper	Lead	Tin	Silver	Zinc	Titanium	Calcium	Magnesium	Silicon	Phosphates	Boron	Molybdenum	Sodium	Potassium
1	05-Dec-2014	15-Dec-2014		unk	Unk		Unk	55	2	2	29	8	0	11		2	0	76	2542	187	315	105	264
	05-Jan-2015	Service / PM			Yes		Yes	Luke S.											1138				
2	18-May-2015	22-May-2015			Unk		Unk	50	2	3	27	7	0	15		1	0	51	2186	181	265	100	263
	02-Jun-2015	Service / PM			Yes		Yes	Luke S.											1289				
3	28-Oct-2015	02-Nov-2015			Unk		Unk	0	0	0	0	0	0	0		2	0	14	77	4	575	373	7
	15-Mar-2016	Service / PM			Yes		Yes	Poe D.											1441				
4	11-Oct-2016	18-Oct-2016			Unk		Unk	50	2	19	34	9	0	12		1	0	36	1916	172	188	102	243
	26-Oct-2016	Service / PM			Yes		Yes	Poe D.											1535				
5	27-Mar-2017	30-Mar-2017			Unk		Unk	46	2	20	27	7	0	10		0	0	36	1809	163	169	91	230

Visual Testing

#	Foam	Color	Oil	Fuel	Magnetic Precipitate	Non-Magnetic Precipitation	Odor
1	None	Clear Green	None	None	None	None	None
2	None	Clear Green	None	None	None	None	None
3	None	Clear Red / Orange	None	None	None	None	None
4	None	Cloudy Dark Green	None	None	None	None	None
5	None	Very Cloudy Dark Green	None	None	None	None	None

4

Basic Testing

#	Freeze Point (°F)	Boil Point (°F)	Antifreeze Percent (%)	pH Waters (pH)	Total Hardness (ppm)	Nitrite (ppm)	Specific Conductance (null)	SCA Number	Carboxylic Acid (Pass / Fail)
1	-21	222	45	9.6	5	656 - Strip	3230	1.7	
	05-Jan-2015	Service / PM		Drain & refill with 50/50					
2	-23	223	46	9.7	2	873 - Strip	3040	1.8	
	02-Jun-2015	Service / PM		Drain and flush. Switched to OAT coolant.					
3	-38	226	52	8.6	5	594 - Strip	3170	2.4	
	15-Mar-2016	Service / PM		Drain, Flush, Refill conventional 50/50					
4	-23	223	46	9.6	2	544 - Strip	2660	1.2	
	26-Oct-2016	Service / PM		Drain, Flush, Refilled 50-50					
5	-23	223	46	8.7	0	547 - Strip	3220	1.1	

3 4 Maintenance history will appear in black on future reports. Test results and maintenance actions will sort themselves into chronological order.

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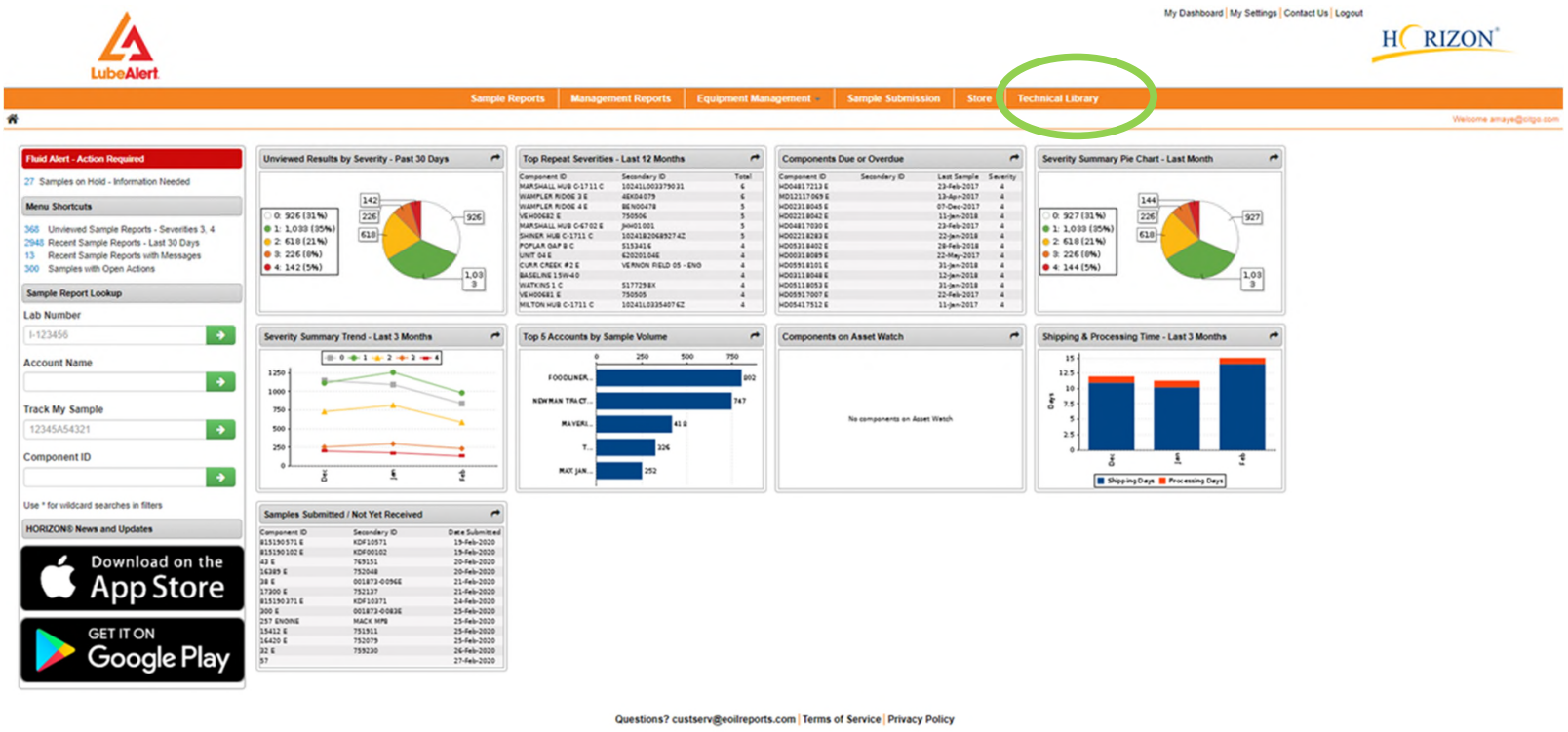
LubeAlert Technical Library

LubeAlert Dashboard Overview



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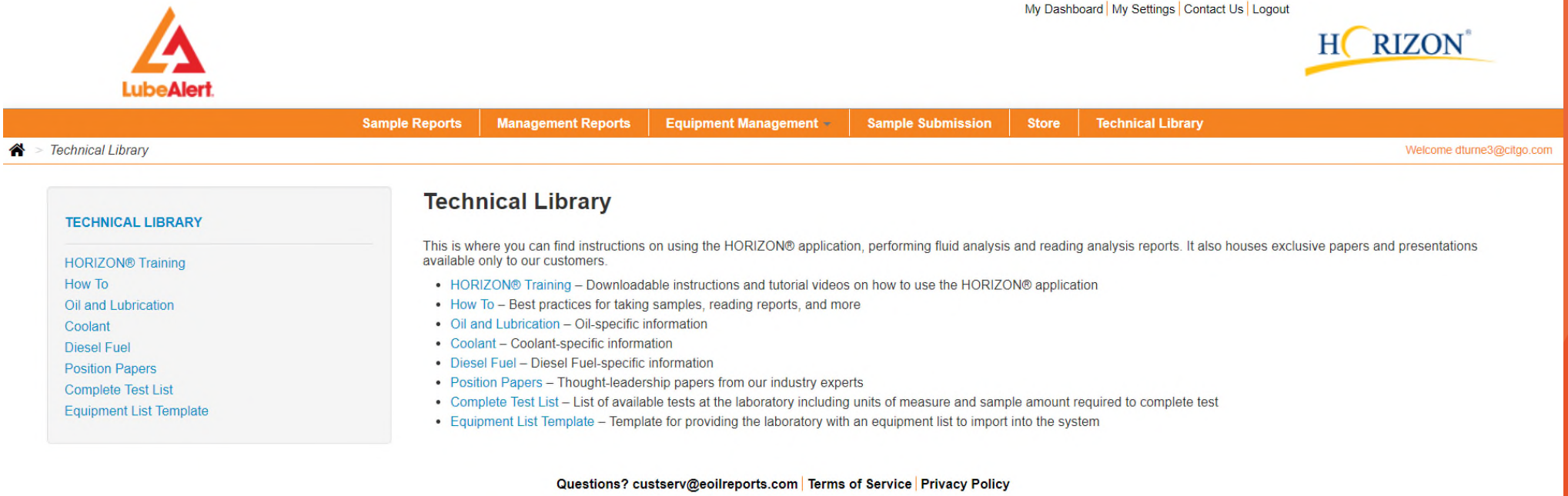
LubeAlert® TRAINING / TECHNICAL LIBRARY



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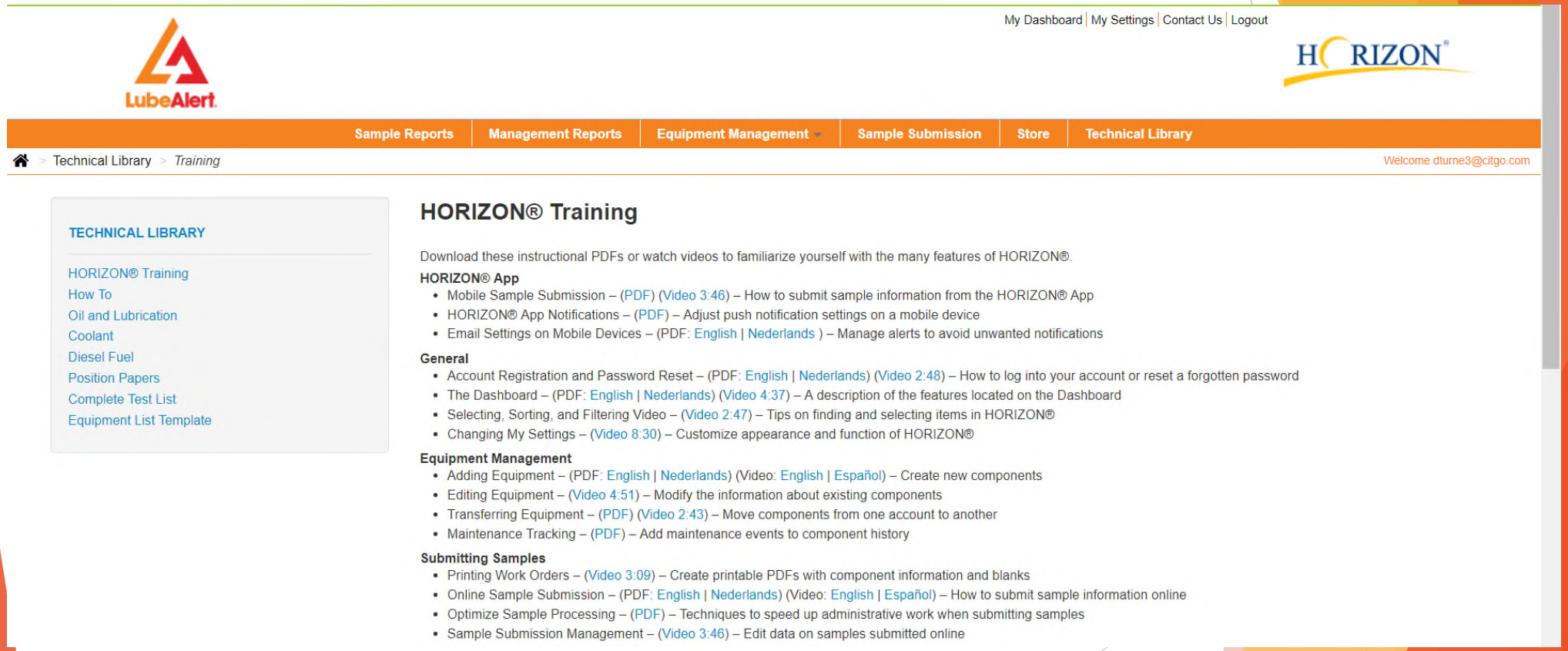

LubeAlert® TRAINING / TECHNICAL LIBRARY

Sample Reports

- Sample Report Delivery – (PDF) (Video 5:34) – Set up subscriptions for sample reports
- Finding a Sample Report – (Video 4:27) – Multiple ways of finding a sample report
- Reading a Sample Report – (PDF: English | Nederlands) (Video 9:50) – How to understand the information and features of a sample report
- Sample Report Management – (PDF) – How to use online sample report features
- Submitting Actions Taken – (Video 4:19) – Send maintenance actions and feedback to the lab staff

Management Reports

- Management Report Overview – (PDF) (Video 5:04) – A description about the management report features
- Severity Summary Report – (PDF) (Video 5:04) – Identify the equipment that need immediate maintenance
- Sample Schedule Report – (PDF) (Video 2:57) – Find components due or overdue for sampling
- Sample Volume Report – (Video 3:07) – Quantify sample volume per month
- Sample Frequency Report – (Video 4:53) – Chart sample results by component and severity
- Turnaround Time Report – (Video 4:40) – Examine how quickly samples are shipped and tested
- Equipment List Downloads – (Video 5:11) – Extract a CSV file with component information
- Data Extraction Tool – (PDF) (Video 3:47) – Download raw data from your sample results
- Problem Summary Report – (PDF) (Video 8:54) – Identify problems by equipment type, manufacturer, or model
- Program Condition Report – (Video 4:01) – A summary of your oil analysis program
- Data Analysis Report – (Video 4:10) – Run statistics on test result values
- Sample Submission Report – (Video 3:09) – Extract a list of samples submitted online

Videos

- Part 1: Introduction to HORIZON® – (Video 56:33) – Introductory training for new HORIZON® users, this course will teach you how to track your sample's progress through our laboratory, view your reports online, configure your account settings, and set or change subscription options.
- Part 2: Simplify Equipment and Sample Management with HORIZON® – (Video 44:45) – This course teaches core skills for daily HORIZON® users, including adding and editing equipment lists, submitting and editing sample information online, placing specific equipment on watch, and using the interactive online sample reports.
- Part 3: HORIZON® Management Reports – (Video 52:34) – Unlock the true power of a managed fluid analysis program with HORIZON® Management Reports. These reports will help you pinpoint, track, and resolve issues- decreasing maintenance costs and equipment downtime.

LubeAlert Contacts

CUSTOMER SERVICE CONTACTS

EMAIL

custserv@eoilreports.com

PHONE

855.820.9561 | 317.218.5100

HOURS

MONDAY-FRIDAY
7:30 A.M. E.T. – 7:00 P.M. E.T.

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QUESTIONS | DISCUSSION

For additional questions about the **LubeAlert**® HORIZON application, please contact us at:

1.855.820.9561

custserv@eoilreports.com

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Questions

- Please post your questions using the Q&A function.

How to Contact CITGO

- Lubes Answer Line

  800-248-4684

  - 8:00 AM - 12:00 PM, 1:00 PM – 5:00 PM CT
  - Monday through Thursday

  - 8:00 AM - 12:00 PM, 1:00 PM – 4:30 PM CT
  - Friday

  lubeshelp@citgo.com

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Future Webinars

- July 22, 2022 Lubricant Storage and Handling
- August 12, 2022 Tractor Hydraulic Fluids
- August 26, 2022 2022 Product Guides
- September 2, 2022 Fundamentals of Lubrication

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