



LubeAlert Introduction 2022

The webinar will begin in
less than 10 minutes.





LubeAlert Introduction 2022

The webinar will begin in
less than 5 minutes.





LubeAlert Introduction

2022

powered by:



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*



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



New LubeAlert Account Access



New LubeAlert Onboarding information sheet

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*: _____	Import history?: Choose One
Contact*: _____	Previous Company Lab: _____
Address*: _____	
Phone*: _____	
Email*: _____	

Onboarding Information Sheet | Equipment List | How To Complete | +



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 of 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 test samples per unit, motor, lubricant	ICE Diesel Engines			Gas Engines (GIP*)			WSP		
	Regular	with TAN and TBN	with TAN and TBN w/ TBN	Regular	with TAN and TBN	with LPG	Regular	with TAN and TBN	with TAN and TBN
Viscosity at 100°C (and ASTM D445)	•	•	•	•	•	•	•	•	•
Viscosity at 40°C (and ASTM D445)	•	•	•	•	•	•	•	•	•
Total Elements and Address (and ASTM D595)	•	•	•	•	•	•	•	•	•
Water by Color (Internal method)	•	•	•	•	•	•	•	•	•
Acid Number (and ASTM D568)	•	•	•	•	•	•	•	•	•
Rain Number (and ASTM D4222)	•	•	•	•	•	•	•	•	•
Cloud Point (and ASTM D595)	•	•	•	•	•	•	•	•	•
Flash Point (ASTM D92)	•	•	•	•	•	•	•	•	•
Particle Count (ISO 4406 calibration ISO 11171)	•	•	•	•	•	•	•	•	•
pH (and ASTM D764)	•	•	•	•	•	•	•	•	•
Cloud (and ASTM D2282)	•	•	•	•	•	•	•	•	•

* All gas engines of last packages will provide test results to deakato NLS/NAP 2222 Class 2 requirements. Contact customer service to apply Class 2.

Sample Submission

- Order Kits**
Order a 30 pack of oil and coolant testing kits, which include 3 test kits, and make, and shipping per individual diesel fuel kit come with one 20 oz. jar, label, seal, marker, and shipping box.
- Shipping Samples**
Review the locations listed on the paper form to identify the laboratory location nearest you, and attach address label to 30 pack material.
• Place sample jar and form in applicable, in 30 pack material.
• Ship by tracked delivery services such as UPS, FedEx or DHL.
- Electronic Sample Submission**
Use the LubeAlert mobile app to submit sample data while in the field. To enter multiple samples of one, access www.lubealert.com on your desktop.
- Written Data Submission**
When submitting equipment information for the field, 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 sample filter has been changed. All information can be submitted electronically.

Other Test Packages*

Cooling Systems*
Sample Kit Includes: 2 oz. sample jar, soft marker, label/form
Sampling Interval: At manufacturer's service intervals
CL2P Coolant Level 2
• Anti-Freeze % (Internal method)
• Elemental Metals by ICP (and ASTM D6130)
• Freeze Point (and ASTM D3321)
• Boil Point (Internal method)
• Nitrite (Internal method)
• pH (ASTM D1997)
• Specific Conductance (meter measurement)
• Visuals (color, oil, fuel, foam, magnetic precipitate, non-magnetic precipitate, odor & burn) (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 (and ASTM D6304C)
• Bacteria, Fungi, Mold (Internal method)
DFAP Diesel Fuel Analysis
• Elemental Metals by ICP (and ASTM D6130)
• Particle Count (ASTM D7647-19)
• Water PPM by Karl Fischer (and ASTM D6304C)
• Flash Point - Closed Cup (ASTM D92B20)
• Water & Sediment (ASTM D1709)
• Bacteria, Fungi, Mold (Internal method)
• Thermal Stability (and ASTM D6469)

*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

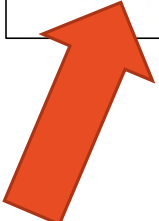
To download the latest information and resources, go online to www.lubealert.com/new/Default

Laboratory Locations

Send your samples to the laboratory location nearest you.

- Edmonton**
5140 76th Street
Edmonton, Alberta Canada TEE 6N2
- Salt Lake City**
3006 W. California Avenue
Suite B
Salt Lake City, UT 84104
- Houston**
12910 W. Sam Houston Pkwy. N. Suite 700
Houston, TX 77064-8214
- Indianapolis**
7651 Winston Drive
Indianapolis, IN 46208
- Guatemala**
Calle de Amancio T-22-40 zona 12, 01012
Centro Empressarial El Conjeto II, Ofidoboga 219
Guatemala City, Guatemala

SUPPORT
Call: 866-405-8561 | 313.718.5110
Email: customers@lubealert.com



LEARN MORE ABOUT OUR LUBEALERT SOLUTIONS:

[DOWNLOAD THE LUBEALERT FLYER](#) [LUBEALERT FAQs](#)



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			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 LFG	Regular	Particle Count and TAN
	HREG	HTT	HTAN or HTBN		HNE with TAN	GTPW	GTPPW	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)							●		



Get The Reports To The Right People

Select	Account Number	Account Name	City	State	Country
<input checked="" type="checkbox"/>	CITGON0043	BEST CARTAGE	KERNERSVILLE	NC	US

CITGON

0987

0011

Digits 1-6:
CITGO LubeAlert

Digits 7-10:
End-User (YYYY)

Digits 11-14:
Location/Site (LLLL)



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





Email Address

Password

Remember Username

[Forgot Password](#)

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



LubeAlert®

Login

(www.lubealert.com)



LubeAlert® DASHBOARD

[My Dashboard](#) | [My Settings](#) | [Contact Us](#) | [Logout](#)



[Sample Reports](#) | [Management Reports](#) | [Equipment Management](#) | [Sample Submission](#) | [Store](#) | [Technical Library](#)

Welcome amaye@citgo.com

Fluid Alert - Action Required

- 27 Samples on Hold - Information Needed
- Menu Shortcuts**
- 368 Unviewed Sample Reports - Severities 3, 4
 - 2948 Recent Sample Reports - Last 30 Days
 - 13 Recent Sample Reports with Messages
 - 300 Samples with Open Actions

Sample Report Lookup

Lab Number
I-123456

Account Name

Track My Sample
12345A54321

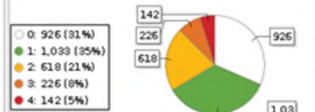
Component ID

Use * for wildcard searches in filters

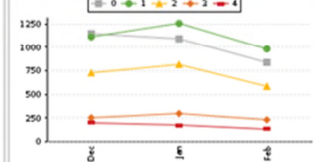
HORIZON® News and Updates



Unviewed Results by Severity - Past 30 Days



Severity Summary Trend - Last 3 Months



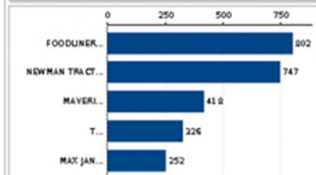
Samples Submitted / Not Yet Received

Component ID	Secondary ID	Date Submitted
815190371 E	KDF10071	19-Feb-2020
815190302 E	KDF001002	19-Feb-2020
43 E	769151	20-Feb-2020
16389 E	752048	20-Feb-2020
38 E	001873-0096E	21-Feb-2020
17900 E	750237	21-Feb-2020
815190371 E	KDF10071	24-Feb-2020
300 E	001873-0083E	25-Feb-2020
257 ENOINE	MACX MPB	25-Feb-2020
15412 E	751911	25-Feb-2020
16420 E	752079	25-Feb-2020
32 E	759230	26-Feb-2020
57		27-Feb-2020

Top Repeat Severities - Last 12 Months

Component ID	Secondary ID	Total
MARSHALL HUB C-1711 C	102411003379031	6
WAMPLER RIDGE 3 E	4EK04079	6
WAMPLER RIDGE 4 E	BE000478	5
VEH05682 E	750506	5
MARSHALL HUB C-4702 E	JMH01001	5
SHINER HUB C-1711 C	10241820689274Z	5
POPLAR OAP B C	5153416	4
UNIT 04 E	62020104E	4
CURK CREEK #2 E	VERNON FIELD 05 - ENO	4
BASELINE 1 SW-40		4
WATKINS 1 C	5177294X	4
VEH00681 E	750505	4
MILTON HUB C-1711 C	10241103354076Z	4

Top 5 Accounts by Sample Volume



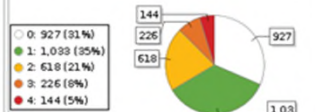
Components Due or Overdue

Component ID	Secondary ID	Last Sample	Severity
HD04817213 E		23-Feb-2017	4
MD12117069 E		13-Apr-2017	4
HD02318045 E		07-Dec-2017	4
HD02218042 E		11-Jan-2018	4
HD04817030 E		23-Feb-2017	4
HD02218283 E		22-Jan-2018	4
HD05318402 E		28-Feb-2018	4
HD00318089 E		22-May-2017	4
HD05518101 E		21-Jan-2018	4
HD03118048 E		12-Jan-2018	4
HD05118053 E		21-Jan-2018	4
HD05917007 E		22-Feb-2017	4
HD05417512 E		11-Jan-2017	4

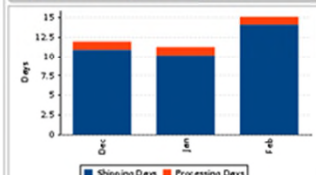
Components on Asset Watch

No components on Asset Watch

Severity Summary Pie Chart - Last Month



Shipping & Processing Time - Last 3 Months



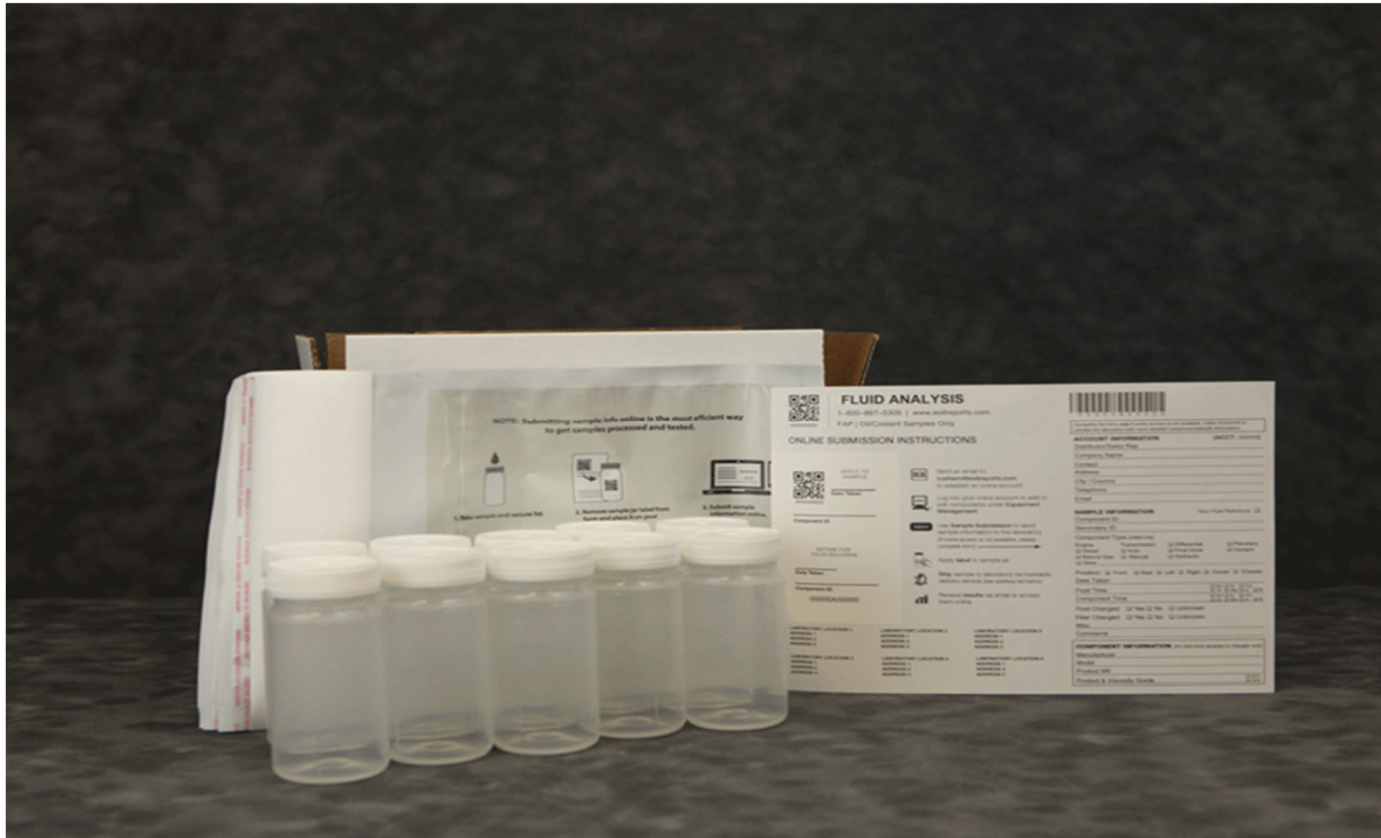
Questions? custserv@oilreports.com | [Terms of Service](#) | [Privacy Policy](#)



TAKING & SUBMITTING SAMPLES

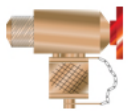


LubeAlert® KITS

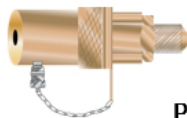


How to Take an Oil Sample / Technical Library

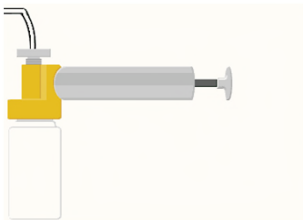
- ❑ Drain Catch Method
- ❑ Vacuum Pump Method
- ❑ Sample Valve Methods
 - Push Button
 - Push Pin (Needle Probe)



Push Button



Push Pin



HCORIZON

TECHNICAL BULLETIN

How to Take an Oil Sample

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 1/2 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.

1 | How to Take an Oil Sample

SUBMITTING YOUR LUBRICANT, COOLANT AND FUEL SAMPLES

SAMPLE INFORMATION & COMPONENT REGISTRATION FORMS



ADVANCED MOBILE
1-877-808-3750 | www.ecoilreports.com
AMP | Oil/Coolant Samples Only

ONLINE SUBMISSION INSTRUCTIONS

A

APPLY TO SAMPLE

Date Taken _____

Component ID _____

RETURN 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

B

POLARIS LABORATORIES
7451 WINTON DRIVE
P.O. BOX 89983
INDIANAPOLIS, IN 46268

POLARIS LABORATORIES
10910 W. SAM HOUSTON PKWY N
STE 700
HOUSTON, TX 77064-9903

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

C

ACCOUNT INFORMATION (ACCT: CITGON)

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

Position: Front Rear Left Right Center Chassis

Date Taken _____
Fluid Type _____
Fluid Time _____
Component Time _____

NOTE: The following samples is the most efficient way to get samples logged and tested.

1. Take sample
2. Fill out form
3. Remove labels from jar
4. Place jar and form in plastic envelope
5. Attach return label and place in the plastic envelope
6. Place return envelope in the appropriate box
7. Attach shipping label and place in the appropriate box
8. Let the mail carrier place the envelope in the mail

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 it 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

00000A00000

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)

<input type="checkbox"/> Engine	<input type="checkbox"/> Transmission	<input type="checkbox"/> Bearing	<input type="checkbox"/> Gear
<input type="checkbox"/> Diesel	<input type="checkbox"/> Auto	<input type="checkbox"/> Compressor	<input type="checkbox"/> Turbine
<input type="checkbox"/> Natural Gas	<input type="checkbox"/> Manual	<input type="checkbox"/> Hydraulic	
<input type="checkbox"/> Other: _____			

Position: Front Rear Left Right Center Chassis

Date Taken _____

Fluid Time hr min sec day mo yr

Component Time hr min sec day mo yr

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 API SAE

ONLINE SUBMISSION INSTRUCTIONS



APPLY TO SAMPLE
Date Taken _____
Component ID _____
00000A00000



Send an email to: custserv@ecolreports.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

Component ID _____

RETAIN FOR YOUR RECORDS

Date Taken _____

Component ID
00000A00000

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

LUBEALERT LAB
12910 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



LubeAlert® CITGO EZ LABEL



ADVANCED MOBILE

1-877-808-3750 | www.eoilreports.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

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

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

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



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



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

Position: Front Rear Left Right Center Chassis

Date Taken

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



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	VISOCIISTY GRAI	FILTER TYI	FILTER MICRC

Equipment List | How To Complete



LubeAlert® EQUIPMENT LIST



Sample Submission

Additional Actions



Sample Submission Selection Wizard

Select By [Account](#) > [Components](#)

Use * for wildcard searches in filters

Show 50 entries

Search

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



DRIVING EFFICIENCIES TOGETHER COMPONENT TAGS SIMPLIFY SUBMISSION

Submitting sample information
has never been easier

TAG EQUIPMENT WITH QR CODES



Print QR codes directly
from **HC RIZON**[®]



Save Time



Save Labor




Save Costs



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.ecoilreports.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 68963
INDIANAPOLIS, IN 46268

LUBEALERT LAB
P.O. BOX 30820
3960 CALIFORNIA AVE, STE B
SALT LAKE CITY, UT 84104

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

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 Auto Natural Gas Other _____
 Transmission Bearing Gear Compressor Turbine Manual Hydraulic _____
 Position: Front Rear Left Right Center Chassis
 Date Taken _____
 Fluid Time _____ km hr mi ml gal qt oz lb
 Component Time _____ km hr mi ml gal qt oz lb
 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 _____ S1 S2

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



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.



Online Submission



[My Dashboard](#) | [My Settings](#) | [Contact Us](#) | [Logout](#)



[Sample Reports](#) | [Management Reports](#) | [Equipment Management](#) | [Sample Submission](#) | [Store](#) | [Technical Library](#)

Home > [Sample Submission](#)

Welcome amare@citgo.com

Sample Submission

Auto Fill Values: ▾

[Collapse All](#) | [Expand All](#)

Component ID: 165 E ✓

Component Information

Account Number [REDACTED] [Lubricant](#)
Company Name
Component ID
Secondary ID
Component Type DIESEL ENGINE
Component Manufacturer CUMMINS
Component Model M11
Application O-T-R TRUCKING
Hydraulic System Pressure 0
Sump Capacity 11
Filter Type
Filter Micron Rating 0
Product Manufacturer CITGO
Product Name CITOGARD 700 SYNTHETIC BLEND
Product Grade SAE 10W30
Wildcard 1
Wildcard 2
Wildcard 3

Sample Information

Tracking Number

Sample Date *

Fluid Time Miles ▾

Component Time Miles ▾

[Calculate Fluid Time](#)

Fluid Changed * ▾

Filter Changed * ▾

Amount Fluid Added Gallons ▾

Kt * ▾

Rush

Purchase Order

Misc.

Additional Testing

Notes To Analyst



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.



Reading a report

HOW TO READ A REPORT



Lubricant Analysis Report

North America: +1 877 608 3750

0 1 2 3 4

Account Information		Component Information		Sample Information			
Account Number: 000000-00000000	Company Name: ABC COMPANY	Component ID: 00000 ENGINE	Secondary ID: TRACTOR HYDRA-GOMELLA	Tracking Number: 0000000000	Lab Number: 00000000		
Address: 1234 Main Street City: Anytown State: CA 95000 Postal Code: 11111		Component Type: DIESEL ENGINE	Manufacturer: MERRILL INFORMATION	Lab Location: Houston	City/State: 4808		
Filter Information:		Manufacturer Information:	Product Manufacturer: CHEVRON	Product Name: DELLO 48E (E)	Miscellaneous: 3MS 15000		
Filter Type: FRAPLON 6 Bypass	Metric Rating: 15						
Comments: SUGGEST INSPECTING this unit for excessive bearing wear. Bearing metal has increased and is now at a SEVERE LEVEL. Suggest inspecting cooling system, track gaskets, heads, seals, EGR system, etc. for leaks. Carbon indicators (oilburn, Pistonwear) are at a SEVERE LEVEL. Suggest fueling system, FUEL DILUTION is at a MINOR LEVEL. FUEL DILUTION possibly caused by excessive idling. Dark Rugged indicates that risk of FAILURE IS HIGH for this unit if MAINTENANCE IS NOT performed. Reinspect at next merge.							
Major Metals (ppm)		Contaminant Metals (ppm)		Multi-Source Metals (ppm)		Additive Metals (ppm)	
Sample #	Unit	Iron	Copper	Aluminum	Lead	Chromium	Vanadium
1	24	0	0	0	0	0	0
2	18	0	0	0	0	0	0
3	15	0	0	0	0	0	0
4	22	0	0	0	0	0	0
5	13	0	0	0	0	0	0
Sample Information		Test Information		Fuel Information		Fuel Information	
Sample #	Date Sampled	Date Received	Lab Time	Lab Change	Lab Added	Lab Time	Lab Time
1	17 May 2013	17 May 2013	3	0	0	0	0
2	18 May 2013	17 May 2013	1050	1430	Yes	0	0
3	24 Jul 2013	20 Jul 2013	125	2447	Yes	0	0
4	04 Dec 2013	05 Dec 2013	856	7497	No	0	0
Public Good (ppm/1000)		Public Good (ppm/1000)		Public Good (ppm/1000)		Public Good (ppm/1000)	
Sample #	SO Code	Base Oil	ppm	ppm	ppm	ppm	ppm
1	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0
Notes: None flagged for observation only. MODERATE PHOSPHORUS level could be a concern indicator. Current tests at this time will likely only be the diagnostic. Suggest MONITORING DISCRETELY. SEVERE LEVEL likely between samples suggest this has been introduced and contained. Lubricant and filter change also indicated.							
Postcard Messages: Fill this trailer out of service, we need to have a service tech open this unit up and find the coolant leak. While the unit is down, change the mainline bearings out.							

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 Date
 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.eoilreports.com/library.



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



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

Sample Reports

Welcome jaorsta@polarlabs.com

Report Selection



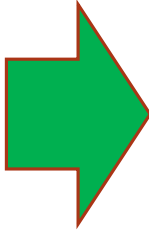
Lubricant Analysis Report

North America: +1-855-820-9561

0	1	2	3	4
NORMAL	ABNORMAL			

Overall report severity based on comments.

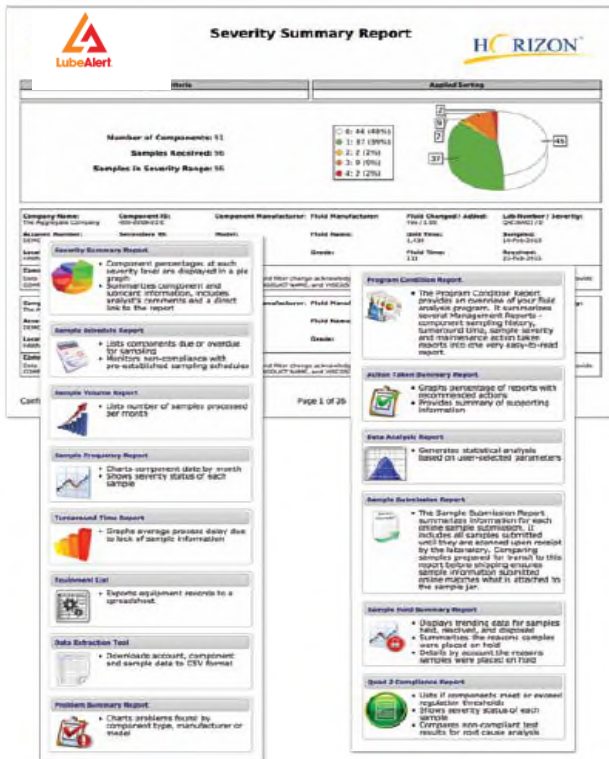
Account Information	Component Information	Sample Information
1-0000 IDY MIX - 085 CKER CHURCH US '	Component ID: 344 E Secondary ID: 001344-0030E RIGHT REAR Component Type: DIESEL ENGINE Manufacturer: CATERPILLAR Model: C13 Application: UNKNOWN Sump Capacity: 38 gal	Tracking Number: 20253B67613 Lab Number: I-625125 Lab Location: Indianapolis Data Analyst: CMD Sampled: 02-Nov-2020 Received: 09-Nov-2020 Completed: 10-Nov-2020
Filter Information	Miscellaneous Information	Product Information
Filter Type: Information Requested Micron Rating: 0		Product Manufacturer: CITGO 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.	



Sample #	Wear Metals (ppm)										Contaminant Metals (ppm)							Multi-Source Metals (ppm)						Additive Metals (ppm)				
	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	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				



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

KEEP PROGRAM ON TRACK



Program Condition Report

Fluid Types: All
Date Range: 01-Jan-2019 - 31-Dec-2019
Display active: True
equipment only:



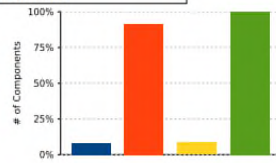
Applied Criteria
Account Number starts with CITGON0036

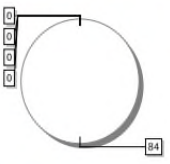
Due / Overdue Components	#	%
Components on File	447	
Components Sampled	37	8%
Components Not Sampled	410	92%
Components Never Sampled	38	9%
Components Due in March	447	100%

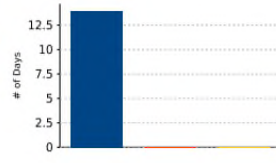
Severity Summary	#	%
Number of Samples	84	
Severity 0	84	100%
Severity 1	0	0%
Severity 2	0	0%
Severity 3	0	0%
Severity 4	0	0%

Turnaround Time	#
Average Shipping Days	13.92
Average Processing Days	0.00
Average On Hold Days (0 Samples)	0.00

Action Taken	#	%
Actions Suggested	0	
Open Actions	0	0%
Found problem	0	0%
Did not find problem	0	0%
Found other problem	0	0%
No action taken	0	0%








Example




IDENTIFY BIGGEST PROBLEMS



Problem Summary Report

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



Applied Criteria
Account Number starts with XXXXXXXXXX

	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%	1	0%								
Secondary Maintenance	1	1%	0	0%	0	0%	1	33%	2	1%								
Severity 0	79	89%	74	99%	50	96%	42	100%	18	67%								
Severity 1	7	8%	0	0%	2	4%	0	0%	0	0%								
Severity 2	1	1%	0	0%	0	0%	0	0%	0	0%								
Severity 3	1	1%	1	1%	0	0%	0	0%	1	33%								
Severity 4	1	1%	0	0%	0	0%	0	0%	0	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%	0	0%	3	1%
Minor Maintenance / Contamination																		
Diagnostics	0	0%	0	0%	0	0%	0	0%	0	0%	1	33%	0	0%	0	0%	1	0%
Change Filter	1	1%	0	0%	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%	0	0%	1	0%
Miscellaneous																		
Beginning Coolant Leak	2	2%	0	0%	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%	0	0%	12	4%
Invalid Sample	1	1%	1	1%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	2	1%



- 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 data by month
 - Shows severity status of each sample
- Turnaround Time Report**

 - Graphs average process delay due to lack of sample information
- Data Extraction Tool**

 - Downloads account, component and sample data to CSV or XSL format
- Problems Summary Report**

 - Charts problems found by component type, manufacturer or model
- 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

LubeAlert Mobile App



LubeAlert[®] MOBILE APP

The Power of **LubeAlert[®]**
Is at Your Fingertips

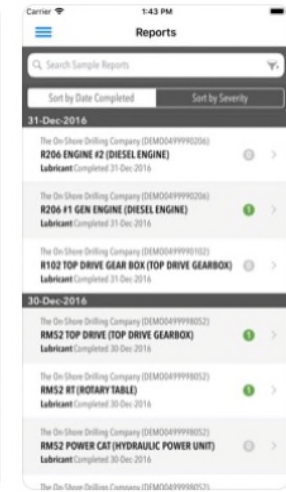
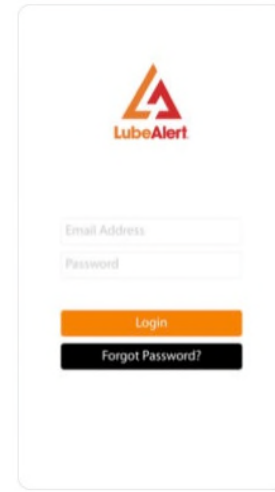
Take Action.
Anytime.
Anywhere.

Save five minutes per sample with electronic submission and report alerts

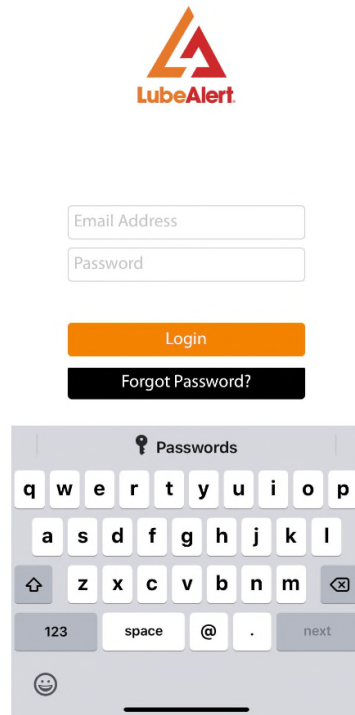
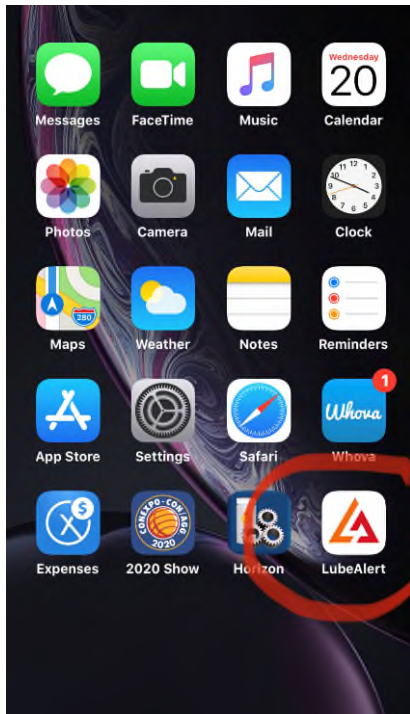


CITGO LubeAlert
Powered by HORIZON

OPEN



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)



Mobile App - Fluid Analysis on the Go



CITGO LubeAlert
Powered by HORIZON

OPEN

The Power of LubeAlert Is At Your Fingertips

Mobile app login screen showing the LubeAlert logo, input fields for Email Address and Password, and buttons for Login and Forgot Password?

Mobile app Reports screen showing a list of reports with columns for Date Completed and Severity. The list includes reports for R204 ENGINE #2 (DIESEL ENGINE), R204 #1 GEN ENGINE (DIESEL ENGINE), #102 TOP DRIVE GEAR BOX (TOP DRIVE GEARBOX), #M52 TOP DRIVE (TOP DRIVE GEARBOX), #M52 #1 (DIESEL ENGINE), and #M52 POWER CAT (HYDRAULIC POWER UNIT).

Mobile app Report Details screen for sample V-044886. It shows tracking number, date sampled, date received, and date completed. It also displays component information (R206 #1 GEN ENGINE, DIESEL ENGINE) and account information (DEMOS49990204, The On-Shore Drilling Company). A comment section is also visible.

Take Action.
Anytime.
Anywhere.



Save five minutes per sample with electronic submission and report alerts



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

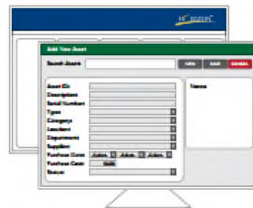


DATACONNECT

DataConnect | *Your data, one location.*



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.

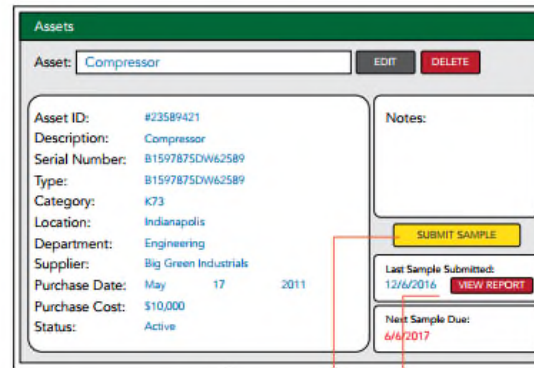


1. CONNECT

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.



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

Sample #	Sample Information					Corrosion Metals (ppm)										Contaminants (ppm)		Corrosion Inhibitors (ppm)			Carrier Salts (ppm/10)		
	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

Basic Testing									
#	Freeze Point (°F)	Boll 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	45	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	45	9.6	2	544 - Strip	2660	1.2	
	26-Oct-2016	Service / PM				Drain, Flush, Refilled 50-50			
5	-23	223	45	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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Fluid Alert - Action Required

27 Samples on Hold - Information Needed

Menu Shortcuts

- 360 Unviewed Sample Reports - Severities 3, 4
- 2948 Recent Sample Reports - Last 30 Days
- 13 Recent Sample Reports with Messages
- 300 Samples with Open Actions

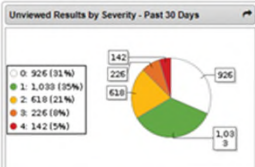
Sample Report Lookup

Lab Number
I-123456

Account Name

Track My Sample
I2345A54321

Component ID

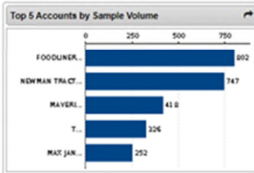
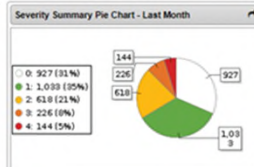


Top Repeat Severities - Last 12 Months

Component ID	Secondary ID	Total
MARSHALL HUB C-1711 C	10241102379031	6
WAMPLER RIDGE 3 E	48040479	6
WAMPLER RIDGE 4 E	88300478	5
VEH0042 E	790506	5
MARSHALL HUB C4702 E	jm01001	5
GUNBER HUB C-1711 C	10241102489274Z	5
POPULAR DAP 3 C	5133416	4
UNIT 54 E	430201048	4
CURK CREEK #2 E	VERNON FIELD 05 - ENO	4
BASELINE 15W-4D	517728X	4
HAYTRES 1 C	H005118093 E	4
VEH0041 E	790505	4
MILTON HUB C-1711 C	10241102354076Z	4

Components Due or Overdue

Component ID	Secondary ID	Last Sample	Severity
H004817211 E		23-Feb-2017	4
M012117049 E		13-Apr-2017	4
H0022118045 E		07-Dec-2017	4
H0022118042 E		11-Jun-2018	4
H004817030 E		22-Feb-2017	4
H0022118033 E		20-Jun-2018	4
H0053118402 E		28-Feb-2018	4
H0053118089 E		22-May-2017	4
H0059118101 E		31-Jun-2018	4
H0031118048 E		12-Jun-2018	4
H005118093 E		10-Jun-2018	4
H005917007 E		22-Feb-2017	4
H005417312 E		11-Jun-2017	4



Components on Asset Watch

No components on Asset Watch



Samples Submitted / Not Yet Received

Component ID	Secondary ID	Date Submitted
81519071 E	KDF10571	19-Feb-2020
815190102 E	KDF00102	19-Feb-2020
43 E	790111	20-Feb-2020
16389 E	792048	20-Feb-2020
28 E	001873-0096E	21-Feb-2020
17300 E	792137	21-Feb-2020
815190371 E	KDF10371	24-Feb-2020
200 E	001873-0083E	25-Feb-2020
257 EVNONE	MAC6 NPG	25-Feb-2020
15412 E	791911	25-Feb-2020
16420 E	792079	25-Feb-2020
32 E	799330	26-Feb-2020
87		27-Feb-2020

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This is where you can find instructions on using the HORIZON® application, performing fluid analysis and reading analysis reports. It also houses exclusive papers and presentations available only to our customers.

- [HORIZON® Training](#) – Downloadable instructions and tutorial videos on how to use the HORIZON® application
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- [Oil and Lubrication](#) – Oil-specific information
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HORIZON® Training

Download these instructional PDFs or watch videos to familiarize yourself with the many features of HORIZON®.

HORIZON® App

- [Mobile Sample Submission – \(PDF\) \(Video 3:46\)](#) – How to submit sample information from the HORIZON® App
- [HORIZON® App Notifications – \(PDF\)](#) – Adjust push notification settings on a mobile device
- [Email Settings on Mobile Devices – \(PDF: \[English\]\(#\) | \[Nederlands\]\(#\)\)](#) – Manage alerts to avoid unwanted notifications

General

- [Account Registration and Password Reset – \(PDF: \[English\]\(#\) | \[Nederlands\]\(#\)\) \(Video 2:48\)](#) – How to log into your account or reset a forgotten password
- [The Dashboard – \(PDF: \[English\]\(#\) | \[Nederlands\]\(#\)\) \(Video 4:37\)](#) – A description of the features located on the Dashboard
- [Selecting, Sorting, and Filtering Video – \(Video 2:47\)](#) – Tips on finding and selecting items in HORIZON®
- [Changing My Settings – \(Video 8:30\)](#) – Customize appearance and function of HORIZON®

Equipment Management

- [Adding Equipment – \(PDF: \[English\]\(#\) | \[Nederlands\]\(#\)\) \(Video: \[English\]\(#\) | \[Español\]\(#\)\)](#) – Create new components
- [Editing Equipment – \(Video 4:51\)](#) – Modify the information about existing components
- [Transferring Equipment – \(PDF\) \(Video 2:43\)](#) – Move components from one account to another
- [Maintenance Tracking – \(PDF\)](#) – Add maintenance events to component history

Submitting Samples

- [Printing Work Orders – \(Video 3:09\)](#) – Create printable PDFs with component information and blanks
- [Online Sample Submission – \(PDF: \[English\]\(#\) | \[Nederlands\]\(#\)\) \(Video: \[English\]\(#\) | \[Español\]\(#\)\)](#) – How to submit sample information online
- [Optimize Sample Processing – \(PDF\)](#) – Techniques to speed up administrative work when submitting samples
- [Sample Submission Management – \(Video 3:46\)](#) – Edit data on samples submitted online



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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.

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Questions

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



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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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