



OELCHECK SAMPLE INFORMATION FORM

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Sample information form – essential details

The OELCHECK sample information form provides essential details for our engineers and laboratory staff in order to process and evaluate your sample most effectively. If an analysis fails it will lead to fallacious testing results and often important advice and further instructions are missing. The most frequent reasons causing these problems are: The oil sample is not representative because there were made mistakes during the sample-taking-process, - or the sample information form was only filled in very messy and incomplete. However, our laboratory staff needs as detailed information as possible in order to handle each sample according to the individual oil type or viscosity. Furthermore our OELCHECK-experts need comprehensive sample information to provide individual and reliable diagnosis statements customized to the various applications.

Despite this obvious fact, still about 20% of all samples arrive with only poorly filled in or even incorrect sample information forms. This leads to misinterpretations, delays and unnecessary additional costs.

If you want to avoid those problems – please, carefully fill in the information form.

Chaos – no thank you!

The OELCHECK sample information form is a well thought-out tool. It provides detailed and relevant information about the oil sample. Please bear in mind that covering letters or self-written notes unfortunately will never replace the sample information form and mostly only make the data entry process more complex.

However, we are still receiving frequently samples with minimal information and sometimes even in very risky and inappropriate vessels. But how can a physician deliver a precise diagnosis without a comprehensive anamnesis?

Therefore, please send us only samples in your own vessel if it is absolutely necessary.

Our OELCHECK analysis kits are very handy and practical. It comprises a special sample bottle + cap for the required volume, an envelope and information form – all together in one handy package, - and, if you then fill in the sample information form carefully and correctly the analysis will run smoothly.

1 Our barcode – the clever number!

Our barcode is the **number** to refer to! The barcode enables us to match each sample with the corresponding sample information form. This is especially important if you send in several samples at once. Therefore, each kit contains the barcode label and number three times:

- on the sample information form (in the top right-hand corner),
- on the bottom left as sticker in order to stick it to the sample vessel,
- on the central bottom of the form – to keep it with you in case of any requests.

All the sender's information can be called up by means of this barcode number. In fact, already upon shipping the vessels to our customers the number is filed and allocated correspondingly in our OELCHECK CRM-database.

The database provides information how many analysis kits have been sold, to whom and which scope, enabling us to track back each single sample quickly and easily in case of any requests.

Upon arrival at our OELCHECK-laboratories the first step is scanning the barcode number. Then immediately our system allocates the number to the respective registered customer, provides details about the ordered scope of analysis and whether we have already received the information form via mail or online data entry.

We generally sell and deliver our OELCHECK-bottles and information forms against pre-payment (=cash in advance). Therefore the sample + barcode can be allocated to the registered customer, even if the address on the form has been made illegible or replaced.

2 One for you – one for us!

The sample information form is **for two parties**. After filling in the form, please remove the lower part of the form (see cutting line). Then fold the upper part of the form and put it into the front part of the OELCHECK envelope which goes directly to OELCHECK along with the sample. Please keep your part of the information form and the barcode number safely in case of any requests!

OELCHECK annually analyses more than 150,000 samples. There are several million samples stored in our database. Sending in samples without any information is like looking for a needle in the

haystack! Therefore it is also up to you and the information you provide us whether we can analyze your sample quickly and effectively. However, even if we know your customer ID and the sample ID it can possibly take some time until the data enters our system.

PLEASE NOTE!

The barcode is a clear and important allocation criterion! Please always indicate the number in case of requests.

3 Full information required!

Usually your customer ID and the available data is already pre-printed on the sample information form. Nevertheless, prior to shipment please re-check all information if it is correct and, if necessary, fill in missing data.

In order to deliver the laboratory report quickly and correctly the following data is indispensable:

- contact person
- department
- extension number
- e-mail address (if need be also more options possible)
- internet address (for our engineers to research for possibly necessary information with regard to your sample)

4 Special features (express service, additional single tests):

Against an extra charge of 25€ we will process your sample by express; i.e. you will receive the sample report on the same day as your sample arrives in our laboratories (Note: signature required!). Moreover you can order additional tests by indicating

them on our sample information form (for more details about tests and prices please refer to our pricelist).

5 Additional information (on the bottom right-hand corner)

Additional company-internal notes: Here you can indicate additional in-house information, e.g. whether the machine/ unit belongs to your company or one of your customers. Primarily this field was designed that you are later able to allocate the sample to your respective customer or plant etc.

If manufacturers or oil traders pass on the sample information forms and bottles, please note (and inform your customer) that this information is necessary for you in order to allocate the sample report to your respective customer. You will find this information on our report together with the details about the unit. The report will be sent to the indicated e-mail addresses (unless other contrary agreements have been made).

Sample information form – middle column

If you send in an oil sample from a certain unit for the first time, OELCHECK enters and stores all information such as unit ID, type, manufacturer and oil type in its comprehensive database. For further

analysis of the same unit, please always use the same unit ID. Otherwise further samples will be filed separately and will not be listed in the unit's individual trend analysis.

6 Individual unit ID

Unit ID: Please use an individual unit ID for your different samples (for future analyses the unit ID remains always the same for the respective sample/ machine). You can use e.g. the machine's name, the serial number or number plates (NOTE: max. length 20 characters).

For OELCHECK it makes no difference how you call your machine, plant or vehicle. In order to receive a proper trend analysis it is, however, important to use always the same unit ID for future analyses.

Just a short example:

The construction business Johnson sends in a sample with the unit ID "bagger 1" + following information: manufacturer = Liebherr, oil type = SAE 85W-140, component = rotatable gearbox system. However the already existing data for "bagger 1" is so far: manufacturer = Caterpillar, oil type = SAE 10W. Therefore the two identically named samples obviously should not be listed on the same report

and trend – since they had been taken from different machines.

PLEASE NOTE: Use clear and individual sample IDs (do not use the same ID for several different machines). Once a unit ID has entered our database, it is fixed and cannot be changed easily.

7 Machine type

In order to make a reliable and machine-oriented diagnosis, OELCHECK needs information about the machine/ component/ vehicle.

8 Machine manufacturers

Furthermore it is also important to know the manufacturer of the respective machine/ vehicle etc. since there are different limit values for e.g. Liebherr, Caterpillar.

Example: The construction business Johnson has several trucks. But "which" trucks? It is too little information to indicate only "truck" since a Mercedes-truck and a MAN-truck have completely different engines. Therefore there are, of course, also different limit values. Consequently it is vital for our OELCHECK-engineers to know the manufacturer and exact machine type.

Barcode auf das Probengefäß kleben. Für jede Probe einen Begleitschein ausfüllen. OELCHECK-Probengefäß ist das Zeichen für vorbezahlte Analyse. Stick barcode label on sample-bottle. Send a separate form for each sample. The OELCHECK-bottle indicates a prepaid analysis of the sample.

Analysenumfang
Analysis kit **Set 3 (gelb) 10**

Grund der Analyse Reason for analysis

Folgeuntersuchung, vorherige Laborm. Trend-analysis, previous lab-number

Routinekontrolle Routine control Umölungskontrolle* Oil type change*

Schaden Damage Sonstiger Grund/Problem Other reason

* Umölungskontrolle/Wechsel der Ölsorte: Vorher eingesetztes Öl
* After oil type change: Previous used oil

Probe aus Sample from

<input type="radio"/> Hydraulik Hydraulic	<input type="checkbox"/> links left
<input type="radio"/> Differential Differential Gear	<input type="checkbox"/> rechts right
<input type="radio"/> Automatikgetriebe Automatic transmission	<input type="checkbox"/> vorn front
<input type="radio"/> Benzinmotor Petrol engine	<input type="checkbox"/> hinten rear
<input type="radio"/> Erdgasmotor Natural gas engine	<input type="checkbox"/> oben top
<input type="radio"/> Biogasmotor Biogas engine	<input type="checkbox"/> unten bottom
<input type="radio"/> Schraubenkompressor Screw compressor	
<input type="radio"/> Kältemaschine Refrigeration compressor	
<input type="radio"/> Schmierfett Grease	
<input type="radio"/> Industriegetriebe Industrial transmission	
<input type="radio"/> Sonstigem Getriebe Other gear	
<input type="radio"/> Andere Other source	

Bitte abtrennen und an Markierung falten. Please tear off and fold.

Bitte diesen Barcode auf das Probengefäß kleben
Please stick barcode label on sample-bottle!

Das OELCHECK-Probengefäß, nicht dieser Probegleitschein, ist das Zeichen für eine vorbezahlte Analyse. The OELCHECK-bottle indicates a prepaid analysis of the sample.

PROBENBEGLEITSCHIN
SAMPLE INFORMATION FORM (SIF)

Probenbezeichnung (Dieses Feld unbedingt ausfüllen!)
Unit ID (Please enter same Unit-ID for same equipment!)

z.B. Kfz-Kennzeichen, Inventar-Nr., Serien-Nr., Name (max. 20 Zeichen)
e.g. vehicle registration, inventory number, machine name (max. 20 characters)

Fahrzeug-/Maschinentyp
Vehicle/Machine type

Hersteller
Manufacturer/Make

Öhersteller-bezeichnung
Lubricant/oil brand name

Viskosität
Viscosity

SAE ISO VG

Ölmenge im System
Lubricant quantity

Nachfüllmenge
Top up volume

Entnahmedatum
Date sample taken

Ölwechseldatum
Date oil changed

Öleinsatzzeit
Oil in use

km Stunden
 Monate Jahre

Gesamte Laufzeit
Total operating time

Öl gewechselt
Oil changed

ja yes nein no

IHR PROBENBELEG
KEEP FOR YOUR REFERENCE

Probe mit der Bezeichnung Unit ID

OC-1 wurde versandt am **OC-1**
Labnummer Send to Laboratory

OELCHECK

Kundnummer Customer number

Firma Company

Titel, Name Title, name

Funktion, Abteilung Function, department

Straße, Postfach Street, P.O. box

Land, PLZ, Ort Country, ZIP, city

Telefon, Durchwahl Phone number, Direct

Fax

Internet internet

E-Mail email

Laborbericht per Lab-report by E-Mail email Post mail

Express-Analyse (25 €) Express analysis (25 € extra)

Sondertest (lt. Preisliste) gewünscht Single test (acc. to price-list)

Datum, Unterschrift Date, signature

Zusätzliche firmeninterne Angaben (erscheinen auf dem Laborbericht)
Additional company-internal notes (printed in lab-report)

Die Daten bleiben in der Datenbank des Verkäufers gespeichert. Proben werden nach 30 Tagen entsorgt.
The values are saved in the seller's database. Samples are disposed after 30 days.

9 Small differences – big impact

Sample from: Given in our database „bagger 1“ is already registered (from rotatable gearbox), a new sample from “bagger 1” (from hydraulic) has to be logically filed separately. Therefore please note the column (bottom, left-hand side) which requires information about where the sample has been taken from (motor, gearbox, hydraulic, differential, bearing etc.).

PLEASE NOTE!

Already upon ordering analysis kits, OELCHECK enables you to choose between different kinds of “tailored” sample information forms. At the moment there are special sample information forms for wind energy plants, turbines/ power stations, engines, compressors, gearboxes and hydraulic systems. Furthermore there are special forms available for greases and fuels.

10 Test range

Scope of analysis = Analysis kit:

Also the scope of analysis is usually already fixed in advance. The difference between the test ranges is easily visible by the color of the bottle’s cap. Furthermore the ordered and prepaid scope of analysis is preprinted on the sample information form. Please note that essential sign for prepayment is to send in the bottle + cap!

11 Reason for analysis

Please state what is the reason for the analysis. Is it in order to monitor the trend? Is there a certain reason or problem? Is it a routine control or do you have any guesses? Is there any possible damage? Have any components been replaced? Have you changed the oil type? Please write down your question or assumption. Then we can respond to it in our diagnosis statement. The more information you provide, the more accurate the final diagnosis will be.

12 Every oil has its own characteristics!

Lubricant, brand, name, viscosity:

If this information does not correspond to reality, it can have serious consequences. The wrong oil, viscosity or additivation may cause severe damage. Please also think of warranty claims. Always pay attention to the recommendations given by the manufacturer. Otherwise it may be of disadvantage to you in case of warranty claims.

Moreover it is for OELCHECK quite easy to find out whether the used oil really corresponds to the indicated oil type. On the other hand it is quite hard for us to identify the oil if you do not indicate any information at all. Although there are only few companies producing additive-packages, still there

are often substantial differences with regard to hydraulic- or gearbox fluids from different lubricant producers of the same specifications. Some of the lubricants are, however, very similar which makes it hard to identify the manufacturer by means of a used oil analysis.

13 Oil type change/Previous used oil

Below this headline please indicate the oil manufacturer and the oil type. This is vital to find out whether the oil type change has been effected successfully and completely.

Example: Bagger 1 was previously operated with SAE 20W-20. Now the oil has been replaced by HLP 46. Possible residues of calcium therefore are not necessarily a reason for limestone but rather suggest that there are still residues of the previously used oil type (SAE 20W-20 has a high content of this calcium additive).

14 Lubricant quantity

Knowing the lubricant quantity enables our OELCHECK-engineers to adjust their comments and recommendations in the diagnosis statement accordingly. Eventually it makes quite a difference to replace 20 liters of oil or a volume of 2000 liters!

15 Top up volume (since last oil change)

Leakage or high oil consumption are reasons to refill some fresh oil. With regard to the total oil volume, the top up volume can be an important detail to know which is not always reported. However it can have an important impact on the diagnosis statement. Whereas there is high oil consumption, oil is being refilled continuously. This leads to a dilution of the values. Therefore it is of help for our engineers to know whether oil has been refilled or if the oil consumption is unusually high.

16 Which date?

Date sample taken

This information is especially important in order to generate a trend analysis. Please always indicate the date the sample was taken, so our system can sort it chronologically. Furthermore it is also important since long storage can also have an effect to the sample fluid, which will then be mentioned and considered in the diagnosis statement.

17 A strong trio!

Date oil changed, oil in use, total operating time:

Those three fields provide crucial information for our OELCHECK-engineers. Obviously it makes a difference since the sample comes from a new machine or from a machine which has been in use for some time. Sometimes new machines are subject

to increased wear before they run smoothly. Please indicate the term by means of the indicated time measurement (km, hours, month, days and years). Always bear in mind that it makes a big difference if the oil has been in the use for 1 year and 2,000 km or 1 year and 100,000 km. According to the machine and application there are moreover certain maximum timeframes the oil should be used. Only by knowing this information our engineers can respond to these issue accordingly.

18 Oil changed?

Please indicate here whether an oil change has been effected along with the sample taking. If the oil has not been changed yet, our engineers can make a statement when the oil should possibly be replaced (estimated by means of similar operating conditions), - or if the oil change interval even can be generally extended.

If the oil has been changed immediately before taking the sample, our engineers will comment on the quality of the oil change and possible contaminations. However, for further information the freshly changed oil is “too young”.

If the oil has been changed after taking the sample – it is needless to recommend to filter the oil or to renew it. Still we can make a comment whether the oil change interval can possibly be extended the next time.