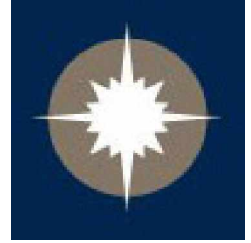


# Technical Bulletin

A POLARIS Laboratories Publication



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## How to Read the POLARIS Oil Analysis Report

Reading an oil analysis report can be an overwhelming and sometimes seemingly impossible task without an understanding of the basic fundamentals for interpreting laboratory results and recommendations. Referring to the report descriptions and explanations below will help you better understand your results and, ultimately, better manage a productive, cost-saving reliability program.

### Customer, Equipment and Sample 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. **Know your equipment and share this information with your laboratory.** Accurate, thorough and complete lube and equipment information not only allows for in-depth analysis, but can eliminate confusion and the difficulties that can occur when interpreting results.

**Unit Type** should give as much detail as possible. **What kind of compressor, gearbox, engine, etc.** influences flagging parameters and depth of analysis. Different metallurgies require different lubrication and have great impact on how results are interpreted.

**Second ID** is each customer's opportunity to uniquely identify units being tested and their location.

**Application** identifies in what type of environment the equipment operates and is useful in determining exposure to possible contaminants.

#### Severity Status Levels:

- 0—Normal
- 1—At least one or more items have violated initial flagging points yet are still considered minor.
- 2—A trend is developing.
- 3—Simple maintenance and/or diagnostics are recommended.
- 4—Failure is eminent if maintenance not performed. Occasionally, a test result can violate the S4 excursion level. But, if there is no supporting data or a clear indicator of what is actually happening within the unit, maintenance action may not be recommended. Customer may be asked to investigate all possible contamination sources, shorten sampling intervals, or simply monitor the situation very closely.

Make note of the difference between the **Date Sampled** and the **Date Received** by the lab. Turnaround issues may point to storing samples too long before mailing or mail service problems.

**Manufacturer and Model** can also identify metallurgies involved as well as the OEM's standard maintenance guidelines and possible wear patterns to expect.

<b>UNIT ID:</b> 2788		<b>SECOND ID</b> NEW BRITAIN CHUCKER							
<b>UNIT TYPE</b> HYDRAULIC						<b>MFR</b> NEW BRITAIN			
<b>APPLICATION</b> PLANT/INDUSTRIAL						<b>MODEL</b>			
<b>LUBE/FLUID MFR</b>									
<b>LUBE TYPE</b>	NUTO H	<b>SUMP CAPACITY</b>	00075	<b>LUBE TIME</b>		<b>DATE SAMP.</b>	04/26/2005	<b>SEVERITY:</b>	4
<b>GRADE</b>	ISO 46	<b>HYD SYS PRESS</b>	00000	<b>UNIT TIME</b>		<b>DATE REC.</b>	05/02/2005	<b>ACCOUNT No.</b>	
<b>FILTER TYPE</b>	NONE	<b>MICRON RATING</b>	000	<b>LUBE ADD</b>		<b>DATE COMP.</b>	05/02/2005	<b>Loc Lab No. DA</b>	728019 KM

**Lube Manufacturer, Type and Grade** identifies a lube's properties and its viscosity and is critical in determining if the right lube is being used.

**Filter Types** and their **Micron Ratings** are important in analyzing particle count—the higher the micron rating, the higher the particle count results.

**Sump Capacity** identifies the total volume of oil (in gallons) in which wear metals are suspended and is critical to trending wear metal concentrations.

**Lube Time** is how long the oil has been used. **Unit Time** is the age of the equipment and **Lube Added** is how much oil has been added since the last sample was taken.

**Data Analyst Initials**

The laboratory at which testing was completed is denoted by an **I** for Indianapolis and an **H** for Houston. The following **Lab #** is assigned to the sample upon entry for processing and should be the reference number used when notifying the lab with questions or concerns.



## Recommendations

A data analyst's job is to explain and, if necessary, recommend actions for rectifying significant changes in a 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.

**COMMENT** Check for source of water contamination. Water is at a SEVERE LEVEL; Lubricant change is suggested if not done at sampling time; Particle count precluded or invalid due to water contamination; Copper is at a MODERATE LEVEL; COPPER sources in hydraulic systems can be from BUSHING/THRUST metal, LOBE COOLER metal (as applicable), PISTON SHOE metal (as applicable); TOTAL ACID NUMBER has increased; Flagged data has been rechecked and confirmed;

**125**  
AAAAA

Numbers with "carets" printed below them denote test results the analyst has **flagged** because they exceed pre-set warning parameters and warrant closer examination or require action.

FLUID ANALYSIS REPORT - 877-808-3750																							
WEAR METALS										CONTAMINANT METALS			MULTI-SOURCE METALS					ADDITIVE METALS					
Fe	Cr	Ni	Al	Cu	Pb	Sn	Cd	Ag	Ti	V	Si	Na	K	Mo	Sb	Mn	Li	B	Mg	Ca	Ba	P	Zn
4	0	0	0	27	0	0	0	0	0	0	0	0	1	0	0	0	0	0	3	42	1	273	368
12	0	0	0	74	1	1	0	0	0	0	1	1	1	0	0	0	0	1	1	37	1	299	342
18	0	0	2	152	6	0	0	0	0	0	2	9	4	0	1	0	0	3	7	55	2	322	365

## Elemental Analysis

Elemental Analysis, or Spectroscopy, identifies the type and amount of wear particles, contamination and oil 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). Consult the POLARIS Wear Metals Guide at [www.polarislabs.com](http://www.polarislabs.com) for a quick reference to possible wear metal sources.

Combinations of these **Wear Metals** can identify components within the machine that are wearing. Knowing what metals a unit is made of can greatly influence an analyst's recommendations and determine the value of elemental analysis.

Knowledge of the environmental conditions under which a unit operates can explain varying levels of **Contaminant Metals**. Excessive levels of dust and dirt can be abrasive and accelerate wear.

**Additive and Multi-Source Metals** may turn up in test results for a variety of reasons. Molybdenum, antimony and boron are additives in some oils. Magnesium, calcium and barium are often used in detergent/dispersant additives. Phosphorous is used as an extreme pressure additive in gear oils. Phosphorous, along with zinc, are used in anti-wear additives (ZDP).

FLUID ANALYSIS REPORT - 877-808-3750																							
WEAR METALS										CONTAMINANT METALS			MULTI-SOURCE METALS					ADDITIVE METALS					
Fe	Cr	Ni	Al	Cu	Pb	Sn	Cd	Ag	Ti	V	Si	Na	K	Mo	Sb	Mn	Li	B	Mg	Ca	Ba	P	Zn
4	0	0	0	27	0	0	0	0	0	0	0	0	1	0	0	0	0	0	3	42	1	273	368
12	0	0	0	74	1	1	0	0	0	0	1	1	1	0	0	0	0	1	1	37	1	299	342
18	0	0	2	152	6	0	0	0	0	0	2	9	4	0	1	0	0	3	7	55	2	322	365



## Test Data

Test results are listed according to age of the sample—oldest to most recent, top to bottom—so that trends are apparent. Significant changes are flagged and printed in the gray areas of the report.

Samples are listed by **Date Received** in the lab—oldest first. They are also assigned a **Lab Number** for easy internal tracking. Important to also note is whether or not the **Lube** has been **Changed** since the last sample was taken.

**Viscosity** measures a lubricant's resistance to flow at temperature and is considered its most important physical property. Depending on lube grade, it is tested at 40 and/or 100 degrees Centigrade and reported in centistokes.

**Oxidation** measures the breakdown of a lubricant due to age and operating conditions. Oxidation prevents additives from working and therefore promotes increased acid content, as well as increased viscosity. **Nitration** is an indication of excessive "blow-by" from cylinder walls and/or compression rings and indicates the presence of nitric acid, which speeds up oxidation. Too much disparity between oxidation and nitration can indicate air to fuel ratio problems. As Oxidation/Nitration increases, TAN will also increase and TBN will begin to decrease.

Providing your lab with a New Lube sample allows the analyst to verify product integrity and establishes a guideline for analyzing subsequent used oil samples. It will appear first on all reports for the unit.

TEST DATA		L	C	F	S	W	V	V	T	T	I-R	I-R	I	4	6	10	14	21	38	70	100
DATE	LUBE RECEIVED UNIT	U	H	B	O	A	V	V	T	T	O	N	S	M	M	M	M	M	M	M	M
		EN	EN	UE	OT	TER	IS	IS	AN	BN	OX	IT	CO	MI	MI	MI	MI	MI	MI	MI	MI
		GE	GE	EL	Vol.	Vol.	40C	100C	Total	Total	IDA	TRA	DE	CR	CR	CR	CR	CR	CR	CR	CR
		D	D	D	Vol.	Vol.	CS	CS	Acid	Base	A	A	E								
08/25/2004		U				0.00	45.80		0.26		3.00	6.00	22 21 15	29926	19918	3082	202	16	1	1	0
08/30/2004																					
12/13/2004		U				0.00	46.00		0.36		3.00	6.00	25 25 22	285646	206133	84487	28600	8196	776	113	25
12/16/2004													AAA	AAA	AAA	AAA	AAA	AAA	AAA	AAA	AAA
04/26/2005		U				69.00	46.10		1.10		7.00	20.00	AAA	AAA	AAA	AAA	AAA	AAA	AAA	AAA	AAA
05/02/2005						AAA			AAA				AAA	AAA	AAA	AAA	AAA	AAA	AAA	AAA	AAA

**Fuel and Soot** results are all reported in % of volume. High fuel dilution decreases unit load capacity. Excessive soot is a sign of reduced combustion efficiency.

**Water** in oil decreases lubricity, prevents additives from working and furthers oxidation. Its presence can be determined by crackle or FTIR and is reported in % of volume. Water by Karl Fischer determines the amount of water present. These results appear in the Special Testing section of your report.

**Total Acid Number** is the amount of acid present in the lubricant. Numbers higher than that of new lube indicate oxidation or some type of contamination. **Total Base Number** measures the lube's alkalinity, or ability to neutralize acid. When TAN and TBN approach the same number, the lube should be changed or "sweetened," meaning more lube could be added.

The **ISO Code** is an index number that represents a range of particles within a specific micron range, i.e. 4, 6, 14. Each class designates a range of measured particles per one ml of sample. The particle count is a cumulative range between 4 and 6 microns. This test is valuable in determining large particle wear in filtered systems.

## Special Testing

Special testing is often done when additional, or more specific, information is needed. For example, an Analytical Ferrograph might be requested when a ferrous metal larger than 5 microns has been detected by Direct Read Ferrography. The AF can determine actual size of the particle, its composition—iron, copper, etc.—and the type of wear it's creating—rubbing, sliding, cutting, etc. Additional special testing could include, Water by Karl Fischer and RPVOT (Rotating Pressure Vessel Oxidation Test).

## Summary

At POLARIS, our data analysts place a wealth of information at your disposal. We provide timely, accurate reporting through our free Internet service, HORIZON. COMPASS, our PC-based data management software, makes that information work for you. Make a habit of reading your analysis reports regularly. Know your equipment and share as much information with your laboratory as possible. Understanding your reports and being able to utilize analysis results to schedule downtime and productively manage your reliability programming, is a vital part of successful predictive and preventative maintenance.