SHELL LUBEANALYST
MANUAL
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Please note that the assessment of lubricant condition is a complex task. Shell and its related bodies corporate have prepared this document as a guide only, to assist you in using Shell LubeAnalyst. It should not be regarded as an authoritative for all machinery, in all circumstances. If in doubt about a particular aspect of testing, contact the equipment manufacturer or your local Shell representative.

Shell may choose to outsource some aspects of the Shell LubeAnalyst Condition Monitoring Service to third parties.
1 Introduction to Shell Lube Analyst

Welcome to Shell Lube Analyst, the leading global oil and equipment condition monitoring service.

Shell Lube Analyst is a health check for your oil and machinery. It is an oil condition monitoring service which helps you to keep your business running smoothly by identifying potential lubricant or equipment failures before they become critical.

Shell Lube Analyst will help your business to save money and time on maintenance and potential lost production caused by equipment failures. It is an early warning system which aims to give you peace of mind knowing that both your equipment and lubricants are in optimum working order.

Why use Shell Lube Analyst?

- Greater equipment reliability and reduced downtime expected through early diagnosis of potential faults.
- Quick and timely results.
- Lower machine repair costs.
- High standards of safety.
- Precise monitoring of operating efficiency.

1.1 Five Simple Steps

There are five simple steps to follow to use Shell Lube Analyst:

Register your customer details and equipment with Shell Lube Analyst.

Take lubricant samples from your equipment and label them.

Send the samples to one of Shell’s accredited laboratories.

Your samples are tested, analysed and entered into our global database.

You’ll receive your report via email or you can view it on the web to see the diagnosis and recommendations.

1.2 How to get the most out of Shell Lube Analyst?

- Define your goals clearly, so that the tests performed fit the application and the environment in which it operates.
- Take the time to complete the sample registration process, as this information is key to the quality of the diagnosis. The less information you provide the more difficult it is for the diagnostician to give an accurate diagnosis and provide recommendations.

Please note that the assessment of lubricant condition is a complex task. Shell and its related bodies have prepared this document as a guide only, to assist you in using the Shell Lube Analyst service. It should not be regarded as an authoritative guide for all machinery and vehicles, in all circumstances. If in doubt about a particular aspect of testing, contact the local Shell representative or your equipment manufacturer.
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2 Getting Started

The following section provides a brief introduction to Shell LubeAnalyst. It details:

- Logging into Shell LubeAnalyst.
- An overview of the options available on the Home screen (Sample Results).
- An overview of the Shell LubeAnalyst user interface.
- Searching for, Printing and Exporting data from Shell LubeAnalyst.

2.1 Registration and Welcome Note

You will receive a confirmation email (Welcome Note) when you have been registered in Shell LubeAnalyst. The PDF attached to the confirmation email will detail your user information including your User ID and Password. It is important to keep this information secure.

The confirmation email will also detail the web address you use to access Shell LubeAnalyst.

Simply click on the web address in the PDF to open Shell LubeAnalyst in a web browser. You can also copy and paste the URL into the address bar of your web browser.

Add this web address to your Favourites so you can easily access Shell LubeAnalyst in the future.

2.2 Logging into and Logging off Shell LubeAnalyst

To log in to Shell LubeAnalyst:

1. Enter your user ID into the User ID text box.

Enter your password into the Password text box.

Ensure the language in which you wish to view Shell LubeAnalyst is selected on the Language drop down menu.

Click the OK button to log into Shell LubeAnalyst.

Please note: existing users of the old LubeAnalyst service or previous versions of the LubeAnalyst web application will be able to log in using their old User ID and Password. Existing users will not receive a confirmation email (Welcome Note).

You will be prompted to change your password the first time you log in. For security purposes you are required to change your password before you will be able to successfully log into Shell LubeAnalyst. Follow the instructions on screen to produce a secure password. (Please see Changing your Password for more information.)
You can also change your password at any time using the **Password** option available under the **User Details** heading on the Shell LubeAnalyst menu. (*Please see Changing your Password for more information.*)

To log out of Shell LubeAnalyst you can use the **Log Off** option on the Shell LubeAnalyst menu or simply close the web browser.

### 2.3 Home Screen

At log in, you will be taken to the **Home Screen**.

#### 2.3.1 Screen Contents

The **Menu Tree** to the left hand side of the screen provides access to all areas of the system.

The **Icons** to the right provide ‘one click’ access to the areas of Shell LubeAnalyst which you will use most often. They are placed on the home screen for your convenience.

- **Inbox Icon** opens the Inbox where you can view latest sample reports
- **Search Icon** opens Track Sample screen to search for specific samples.
- **Sampling Scheduler Icon** opens Scheduler screen to check for overdue samples.
- **Eqpt / Vehicles Icon** opens View Equipment / Component screen where you can search for, modify or add Equipment, Vehicles or Vessels.
- **Material Order Icon** opens Place Material Order screen, where you can place an order for Sample Kits or other sampling materials.
- **User Details Icon** opens the Subscriber screen where you can manage Users and their preferences.

The **Traffic Lights** above the Menu Tree provide an overview of the current status of samples. They show the count and condition of samples which have been completed during the past 30 days, excluding those which have already been removed from the Inbox.

Five symbols are displayed with a count beside each symbol. These status symbols represent the diagnosed condition of processed samples.
In Shell Lube Analyst these statuses are referred to as **Action, Caution, Monitor** and **Normal**. Also displayed is the **Urgent** samples count.

The **Sample Count** beside each status is hyperlinked. Clicking on any of these hyperlinks opens the **Sample Results** screen, displaying all samples in the chosen condition (Action, Caution, Monitor, Normal).

**Urgent samples** are displayed, sorted into priority starting with those which require Action, those which require attention (Caution), those which require monitoring (Monitor) and then Normal samples. Within these four conditions, samples are shown in date order.

The **Total Samples** hyperlink also takes you to **Samples Results** screen displaying all your samples, regardless of condition, sorted in order Urgent samples (condition Action, Caution, Monitor then Normal) followed by Non-Urgent samples (condition Action, Caution, Monitor then Normal). Within these conditions, samples are shown in date order.

### 2.3.2 Sample Results Screen

The **Sample Results Screen** contains a grid displaying samples which have been processed and diagnosed within the last 30 days, excluding those already reviewed.

Click the sample number link in the **Sample No** column to review the associated report. The report will open as a PDF in a new window.

To view multiple reports, select the check boxes in the first column of those sample reports you wish to review and then click the **Show Sample Reports** button.

**Please note:** selecting multiple reports may increase processing time and the reports may take some time to open on your PC.

Once you have viewed a **Sample Report**, you can remove the sample from the **Sample Results** by using the ‘Mark As Done’ button. Just select the relevant Sample(s) by clicking into the box to the left of the Sample Number in the grid, and the ‘Mark as Done’ button becomes enabled. When you click this button, Shell Lube Analyst will remove the selected sample(s) from the Sample Results grid. The screen will refresh and the Traffic Light counts will be updated to show the new count of samples in each condition. The Inbox will also be expanded to show all samples not yet ‘Marked as Done’.

At the top left hand side of the screen you will see the **Shell pectin**; clicking on this symbol will bring you back to the Home Page from anywhere within Shell Lube Analyst. If your session has timed-out you will be taken to the login page.
2.4 Shell LubeAnalyst User Interface

2.4.1 Shell LubeAnalyst menu

The Shell LubeAnalyst menu appears on the left of the screen and is available on every screen.

Operations that can be performed using Shell LubeAnalyst are categorised on the menu under the following headings:

- **Inbox** - the Inbox displays all samples to be reviewed by the user.
- **Favourites** – you can select those customers, sites and equipment which you use most often and move them into ‘Favourites’
- **Equipment / Vehicles** – Main Data View lists your customers, sites, equipment and components, each of which can be added to your Favourites by clicking on the green ‘tick’ symbol. You can also search for existing equipment and components, register new equipment and components, add feedback (maintenance information) for existing equipment and components, access the offline equipment / component registration form.
- **Sample Management** – register new samples for processing; check sample results; track the status of submitted samples; schedule frequency of upcoming samples and receipt of emails reminding you about samples due
- **Failure Analysis** – produce reports which detail sample conditions and component failures over a specified time period.
- **Material Ordering** – order new materials and kits used for obtaining samples and track orders which have been submitted.
- **User Details** – register a new subscriber, edit your password, configure preferences and search for existing subscribers.
- **Site Management** – register a new site and search for existing sites.
- **Useful Information** – access to user guides and registration forms
- **Customer e-training** – the convenient way to learn about Shell LubeAnalyst and all its features.
- **Contact Us** – contact details for Administrative, Technical and Web support.
- **Log off** – log off Shell LubeAnalyst.

The menu works in a similar way to a folder system.

- Click the main heading to expand the category and view the subheadings.
Click on the subheading to open the subheading option in the main area of the Shell Lube Analyst screen.

Clicking on a category which does not have any subcategories will open that main option in the main area of the Shell Lube Analyst screen.

To browse to a new screen:

1. On the Shell Lube Analyst menu click to select the area you wish to access.

If the menu option has sub-menu options these will appear under the main heading.

Click to select the operation you wish to perform.

The screen will open.

2.4.2 Screen Elements

Outlined below are the Screen Elements that are used in Shell Lube Analyst.

- **Links** – Any section of text that is underlined is a hyperlink to another screen. Place your mouse over the link and the cursor will change to a pointer. Click the link to open the new option.

- **Text Box** – a text box is used to input information. Click to place the cursor in the text box and then type the required information.

- **Disabled Text Box** – a greyed out text box is a disabled text box. A disabled text box is used to display information. You will not be able to enter or modify text in a disabled text box.

- **Drop Down Menu** – a drop down menu is used to display a list of options. Click the drop down menu to view the list of options. Click to select the option on the drop down menu.

- **Button** – a button is used to perform an action. Click the button to trigger the action.

- **Calendar Button** – the calendar button will enable you to pick a date from a calendar. Click the Calendar button and then click to select a date in the DatePicker window. You can change the year.
• **Check Box** – a check box allows you to choose multiple selections from a series of options. Click to select the check box. A tick will appear in the check box to indicate that the option has been selected.

### 2.4.3 Tables

Tables are often used in Shell Lube Analyst to display lists of information such as the results returned by a search.

Each Column Heading is a link which can be used to sort the information in the table using the contents of that column. Click on the column heading to sort the rows in ascending order using the contents of the selected column. Click on the column heading again to sort the rows in descending order using the contents of the selected column. Text information will be sorted in an A-Z or Z-A order. Numerical values will be sorted from smallest to largest value or largest to smallest value.

Fields in certain columns may be a link to view the item more closely. Links appear as underlined text. Click the link to open and view the properties of the item.

### 2.5 Search, Print, Export

Shell Lube Analyst contains a database of information relating to Equipment and Components, Samples, Subscribers and Sites. Under each option a Search facility allows you to search for and locate a specific item using search criteria. After performing a search you can also choose to print the search results or export the results to an Excel spreadsheet.

To perform a search:

1. Open the menu item where you wish to perform a search.

Specify the search criteria.

Click the **Search** button.

The results will appear in a table at the bottom of the screen.

#### 2.5.1 Print

To print the search results:
1. Perform a search.

Click the **Print** button.

A new window will appear displaying the search results in a formatted table.

Click the **Print** button.

Select your printer and click the **Print** button.

### 2.5.2 Export

To export the results to an Excel spreadsheet:

1. Perform a search.

Click the **Export** button.

The **File Download** dialog box will appear asking you to save the Excel spreadsheet.

Click the **Save** button and save the Excel file to an appropriate location on your computer.

You can also click the **Open** button to view the file without first saving it.
3 Inbox

3.1 Opening and Closing the Inbox

To access your Inbox, click on **Inbox** in the **Menu Tree** or on the **Inbox icon** on the **Sample Results Home Screen**. The **Inbox** will open and expand to show all the Samples which have been completed within the last 30 days, except for those which you have already reviewed and marked as 'Done'.

To close/collapse the **Inbox**, click on **Inbox** in the **Menu Tree** a second time.

3.2 Reviewing the Samples in your Inbox

Samples are displayed in **Sample Number order** in a tree view structure, further sorted as follows:

- Country/Domain Name (if you are associated to more than one country)
- Customer Name
- Site Name
- Ad hoc Samples
- Equipment / Component Name
- Standard / Advanced Samples

The samples are shown next to a small, square, colour-coded symbol, indicating the sample condition following diagnosis (either Action, Caution, Monitor or Normal), with **Urgent samples** followed by **non-Urgent Samples**.

All Sample Numbers are hyperlinked, and clicking on any **Sample Number** in the **Menu Tree** opens the **Component / Sample Details screen** in the right hand frame.

3.3 Component / Sample Details Screen

The **Component / Sample Details Screen** opens to display the **Component details**, together with a grid showing **Sample Test Results** for previous Samples.
On the Component / Sample Details screen, view individual test results for your most recently completed Sample (highlighted in bold) as well as all previous sample results on the component (up to six months or 13 samples, whichever is the greatest). Use the scroll bars (vertical and horizontal) to view details of further samples.

You can also view any relevant Sample Documents attached to the Sample, or Analysis Comments which the Diagnostician at the Lab may have added to the Sample during diagnosis; or check the Maintenance Feedback (see Equipment & Component Management for more information). You can also compare individual Test Results and show them in a Graph format, and enter any comments you may wish to appear on the Sample Report into the ‘Customer Comments’ text box.

To view historical samples is those which are older than six months or where you have more than 12 samples on the component within the past six months, check ‘View All’ button.

You can also view your Sample Reports online by pressing the ‘View Report’ button, see below.

3.4 View / Print Sample Report

Select sample first by clicking on Sample Number on the Component / Sample Details screen – sample details and test results for selected Sample become highlighted/bold.

Then press ‘View Report’ button. A popup will appear on the screen, containing an online version of the Sample Report produced after all test results have been entered and diagnosed at the Lab, and Sample has been given status of ‘Completed’. (See ‘Interpreting the Sample Report’ for more information).

From the pop-up you can also print a copy of the Sample Report.
3.5 Review Samples and ‘Mark as Done’

3.5.1 Mark Samples as Done

After you have reviewed/printed your Sample Report you can remove the Sample from your Inbox by clicking on the black ‘X’ icon to the right of each Sample Number.

The Sample Number will immediately be removed from your Inbox and the screen will refresh to show the updated list.

3.5.2 Mark non-Urgent Green Samples as Done

Alternatively, you can use the green ‘X’ icon next to ‘Inbox’ in the Menu Tree, a quick and convenient way to ‘Mark non-Urgent Green Samples as Done’. Use this if you don’t wish to individually review those Samples which have been diagnosed as Green/Normal. Shell Lube Analyst will remove the non-Urgent Green Samples from the Inbox for you.

The Inbox will only show completed samples which have not been previously reviewed and marked as done. However should a sample be sent for Rediagnosis after completion, it will again be shown in the Inbox.

If there are no Samples which have been completed within the last 30 days or if all Samples that completed in the last 30 days have been marked as done, then the message ‘No New Samples’ will appear below the Inbox link in the Menu Tree.

3.6 Chart FX Graphs

You can now create and save your own Graphs and Charts of information taken from your sampling history, to help manage failure identification. This feature also allows you to chart test results from different components.
3.6.1 How to Render a Graph

Access the Graph functionality by navigating to the Component Details screen and checking the checkbox to the left of each test which you wish to include in the Graph, selecting single or multiple tests.

Once you have selected the test(s), press the Graph button situated to the top right of the screen to render the Graph.
### 3.6.2 How to Set-up your Graphs

Several aspects of the graph will default to pre-set values, but you can alter most of these to create a **Graph** or **Chart** which is more suited to your requirements. First use the **Set-up Button** to access the **Graph Set-up Pop-up**

From the **Graph Set-up Popup** you can set the content and look of your **Graph**.

Aspects of the **Graph** which you can alter include:

- **Line Information** - Use the grid to the right of the popup to add or remove lines from the Graph. **Line Types** can be either **Sample** or **Sensor**, **Tests** can be selected from the dropdown by clicking on the down arrow and highlighting **Test name**.

- **X-axis** - Change the **X-axis** value by selecting either **Date Drawn**, **Equipment Life** or **Lubricant Life**.

- **Date Range** - Change the **Date Range** by selecting **Date From/To**, **Last 1 Month**, **Last 2 Months** or **Last 3 Months**. Or use the Date Pickers to select Ranges between particular dates of your choice.

- **Generate button** - Then press the **Generate** button to generate the **Graph** for your selected values.
3.6.3 How to Format your Charts

There are several icons which allow you to change the look of the Graphs or Charts that Shell Lube Analyst can produce. These are located at the top left of the Graph; just hover your cursor over each icon to see what it does. Examples include:

- The **Palette Selector icon** changes the colour set which Shell Lube Analyst uses to display the Graph results.

![Palette Selector Icon](image)

- The **Gallery icon** allows you to alter the Chart Type and appearance of the Graph’s Lines and Curves, and select different ways to display the Graph, e.g., Pie Chart, Bar Chart or Combination.

![Gallery Icon](image)

- You can also choose to hide the Y-axis using the ‘Y’ icon.

3.6.4 How to Change the Y-Axis

Hover your cursor over the Y-axis and a small icon will appear on screen, with a down arrow. Click on the Icon and a pop-up will appear containing options from where you can select the appearance of the Y-axis.
3.6.5  How to Save Templates and Profiles

Once you have set up your Graph, you can save the setup and use it again.

If you save the Template you have created, this will become your default layout for all future Graphs.

You can also save a Profile for your critical components for use just with selected Component.

To save a Profile, enter a unique Profile Name into the Profiles and Templates textbox and press the Save Profile button. The unique Profile Name will appear in the box below the Profiles and Templates textbox.

Repeat the above if you wish to save a Template, entering a unique Template Name into the Profiles and Templates textbox and pressing the Save Template button. The unique Template Name will appear in the box below the Profiles and Templates textbox.
4 Favourites

‘Favourites’ is a quick and easy way to collate those Customers, Sites and Equipment which you most often wish to view, thus saving you time and effort.

The ‘Favourites’ link in the Shell LubeAnalyst Menù Tree contains all the data which you have added from the Main Data View (MDV) under Equipment / Vehicles menu (see Equipment & Component Management for more information).

4.1 Adding or Removing Items from your ‘Favourites’

4.1.1 Adding Items to ‘Favourites’

To add an entity to your list of ‘Favourites’, go to Equipment / Vehicles in the Menu Tree, then click on the subheading ‘Main Data View’. This expands the Menu Tree to show your Customers, Sites & Equipment.

Each item which hasn’t already been added to your Favourites will appear with a green ‘✓’ symbol to its right. Clicking on the green ‘✓’ symbol adds the entity to your Favourites list.

Any changes you make to the entity in the Main Data View under Equipment / Vehicles will be reflected in Favourites.

4.1.2 Removing Items from ‘Favourites’

Once you have added a Customer, Site or piece of Equipment to your Favourites, you can remove it by clicking on the red ‘X’ symbol which appears next to its name in the Menu Tree. Clicking on the red ‘X’ removes the entity, together with any sub-entities.

If you add an entity to Favourites from Main Data View, you cannot remove its sub-entities independently. For example, if you add a Site, then all of its equipment / components will automatically move into Favourites, and if you remove the Site from Favourites, all of its sub-entities will also be removed. It is not possible to remove individual sub-entities; you need to remove the Site then add back equipment / components individually.

4.2 Using Favourites Menu to view Sample History

You can also use Favourites to view the Sample History for a component. Select the Customer from the Favourites menu by clicking on the Customer’s Domain (if more than one) then click on the Customer Name.

The Menu Tree will expand to show a list of available Sites for that Customer. Select a Site by clicking the Site Name. Firstly the Menu Tree will further expand to show a list of equipment located at that site, being those items of equipment which you have added from the MDV. Each Equipment / Component listed in the Menu Tree is hyperlinked, taking you through to the Component / Sample Details screen where you can see displayed in grid format the tests performed and results of all the samples processed for your chosen Component. If there are no samples for the component, a message ‘No Completed Samples available for this Component’ will be displayed.
Secondly the right hand frame displays the **Equipment / Component List** screen which also contains the list of the items of equipment for the chosen site but this time in a grid format. You will see that both the **Equipment Description** and the **Component Description** are hyperlinked.

Clicking on either the **Equipment Description** or **Component Description** will open the **View Equipment / Component screen** where you can register, view or modify the equipment or component details (see 'Equipment and Component Management' for more information).
By clicking on ‘Show Eqmt. Samples’ or ‘Show Comp. Samples’, the Track Samples screen opens displaying a grid containing all the completed samples for that Equipment / Component, together with Search options.

This screen also gives you another way of viewing your Sample Reports. Put a check in the checkbox to the left of the Sample No in the grid and the ‘Show Sample Reports’ button becomes enabled; press ‘Show Sample Reports’ and a . Once viewed, you can select the sample (or multiple samples) and use the ‘Mark as Done’ button to show that reports have been viewed/printed; clicking the ‘Mark as Done’ button then removes the sample from the grid.
5 Equipment and Component Management

Using the facilities located under the Equipment / Vehicles menu of Shell Lube Analyst you can:

- display all the equipment and associated components registered in Shell Lube Analyst in Main Data View. This also allows you to select your most viewed equipment / components and add them to your Favourites.
- Register new equipment and modify existing equipment.
- Register new components and modify existing components.
- Enter maintenance feedback information which can be viewed and considered by the diagnostician when processing your samples.

5.1 Main Data View

Shell Lube Analyst Main Data View contains a list of your sites and related equipment and components registered with Shell Lube Analyst, together with completed Sample history, and can be found under the heading ‘Equipment / Vehicles’ in Menu Tree.

5.1.1 Opening and Closing Main Data View

To view your Sites, Equipment, Components or Samples, click the sub-heading Main Data View. This opens and expands the Menu Tree to allow you to select from the additional sub-headings. If you have Customers or Sites located within more than one country, select the relevant country from the list. The Menu Tree expands to display all your Customers within that country. (If your Customers/Sites are located within one country only, Shell Lube Analyst will not display the country name).

Then click on the Customer Name. The Menu Tree will expand to show a list of Sites for that Customer; click on relevant Site Name. The Menu Tree further expands to show a list of all your Equipment at that site, together with the unique Shell Lube Analyst number allocated to that piece of equipment.

5.1.2 Equipment / Component List

At the same time the right hand screen will open the Equipment / Component List screen, showing the same pieces of equipment but this time in table or grid format. Items in the Equipment Description and Component Description columns are hyperlinked and clicking on any of these will take you to the View Equipment / Component screen where you can register, view or modify the equipment or component details.
5.1.3 Adding Items to your Favourites from Main Data View

To add an entity to your list of ‘Favourites’, go to Equipment / Vehicles in the Menu Tree, then click on the subheading ‘Main Data View’. This expands the Menu Tree to show your Customers, Sites & Equipment.

Each item which hasn’t already been added to your Favourites will appear with a green ‘✓’ symbol to its right. Clicking on the green ‘✓’ symbol adds the entity to your Favourites list.

Any changes you make to the entity in the Main Data View under Equipment / Vehicles will automatically be reflected in your Favourites.

Please see Section 4 ‘Favourites’ for help with adding to or removing items from Favourites.

5.2 Registering New Equipment and Components

Equipment is the main machines you have in your business. For example if you are a transport company a truck is a piece of equipment. If you an industrial manufacturing plant then a plastic injection moulding machine or an air compressor are considered pieces of equipment.

Equipment may have a single or multiple components. A truck would have an engine, gearbox, differentials etc as its components. The Injection moulding machine may have a gearbox, bearings, hydraulic systems etc as its components. It is from a Component that lubricant samples are drawn for analysis.
Access the Register Equipment function from the Shell Lube Analyst menu. Click the Equipment / Vehicles heading and then select the Register subheading.

It is important that you only use this option when registering new equipment or registering new equipment and its components. If you wish to register a component for an existing piece of equipment please see Registering a New Component for Existing Equipment for more information.

Registering Equipment is a two-part process:

- **Step 1** – Register the piece of Equipment.
- **Step 2** – Register the associated components for that piece of Equipment.

**Step 1: Registering new Equipment**

To register new equipment:
1. Ensure that your customer name and your country appear in the **Customer Name** and **Country** text boxes.

*If you are associated with only one customer, your customer name will automatically be populated in the Customer Name and Country text boxes and these fields will be disabled.*

Select the **Site Name** from the drop down menu. Your site address will be automatically populated in the **Site Address** text box.

*If you are linked to only one site, your site name and address will appear in the Site Name and Site Address text boxes and these fields will be disabled.*

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Enter the following required information into the appropriate text boxes located under the **Equipment Details** heading.

- **Equipment Group (Eqpmt. Group)** – Equipment group is the group under which the equipment can be categorised.
- **Equipment Type (Eqpmt. Type)** – Equipment type is the type of equipment to be registered.
- **Equipment Description (Eqpmt. Desc.)** – Equipment description is a descriptive name which identifies the piece of equipment.
- **Equipment Manufacturer (Eqpmt. Manuf.)** – Equipment manufacturer is the name of the manufacturer of the type of equipment.
- **Equipment Model (Eqpmt. Model)** – Equipment model is the model of the type of equipment.
- **Warranty** – check this checkbox if the piece of equipment is still under the Manufacturer's Warranty.
- **Criticality** – check this checkbox if this equipment is critical to your business operation.
- **End Date** – If the equipment is still under Warranty, use the Date Picker to select the date when the Warranty will expire.

You can also select a location for the equipment on the **Equipment Location (Eqpmt. Locn.)** drop down menu and enter a reference number into the **Equipment Reference ID (Eqpmt. Ref. ID)** text box.

*Please note: You can use the Add button available next to certain drop down menus, if the menu does not contain an option that adequately describes the piece of equipment.*

Click the **Submit Form** button to register the equipment.
A confirmation message will appear to indicate that the equipment has been saved successfully.

**Step 2: Registering New Component**

To register a component for the new piece of equipment:

Click the **Register New Component** button.

Enter the following required information into the appropriate text boxes located under the **Component Details** heading.

- **Component Type (Comp. Type)** – select the Component type on the drop down menu.
- **Test Suite** – from the drop down menu select the test suite you wish to be performed on samples drawn from this component.
- **Additional Test Suite** – on the popup, select any Additional Test Suite(s) to be included to future samples in addition to the Main Test Suite on the Component.
- **Component Manufacturer (Comp. Manuf.)** – Component manufacturer will default to the manufacturer of the equipment. You can change this to a different manufacturer if required.
- **Component Model (Comp. Model)** – Component model will default to the model number of the equipment. You can change this to a different model number if required.
- **Lubricant** – select the Lubricant used by this component on the drop down menu.
- **Capacity** – indicates the maximum lubricant capacity of the component.

You can also enter a component description and reference ID into the **Component Description (Comp. Desc.)** and **Component Reference ID (Comp. Ref. ID)** text boxes for your own identification purposes.

**Please note:** You can use the **Add** button available next to certain drop down menus, if the menu does not contain an option that adequately describes the component.

Click the **Submit Form** button to register the new component.
A confirmation message will appear to indicate that the component has been saved successfully.

5.3 Manufacturer, Model and Lubricant Telemetric or Ajax Controls

Manufacturers of Equipment and Components within Shell Lube Analyst, and Model and Lubricant records are handled within Shell Lube Analyst by Telemetric Controls or picklists (also known as Ajax Controls). These controls are a quick and speedy way for you to access and select from the many thousands of records available.

One screen where these Telemetric or Ajax Controls are used is the Register Equipment screen where the Equipment Manufacturer, Equipment Model and Lubricants are selected from these picklists.

5.3.1 How to Select items from the Telemetric Controls Picklists

In the Register Equipment screen, the Equipment Manufacturer, Model and Lubricant dropdowns list 200 rows of records initially, displayed alphabetically.
To **Search for an item in the dropdown**, type the first few characters into the **Select** box, wait for a few seconds, and the items beginning with those characters will be populated. Click on the arrow provided at the bottom of the dropdown to populate more items (starting with the character specified).

To **Select an Equipment Manufacturer** from the list, highlight the name by selecting with your cursor; the selected item will move up into and replace the word ‘Select’ and the picklist will close. Selecting a Manufacturer from the picklist will then filter the **Models** which appear in the **Models picklist**, which will now display only those **Models** within Shell LubeAnalyst associated to that Manufacturer.

If the dropdown does not find any records, ‘**No Records Found**’ message will be displayed at the bottom of the dropdown.

In the **modification screens** the dropdown will be pre-populated with only one value, which is the assigned value. This is to reduce the amount of data which is loaded to the screen and improves speed and efficiency.

### 5.3.2 How to Delete items selected from the Picklists

If you **delete the pre-populated or entered value** by clicking on the **Delete** or **Back** button, the dropdown will bring the first 200 values from the system in alphabetical order. If you wish to search for some other value, you can type the first few characters of the value you wish to search for, and a new list starting with the characters you mentioned will start appearing in the dropdown.

### 5.4 Searching for Existing Equipment and Components

After Equipment and Components have been added you will be able to find and view the properties of these items in Shell LubeAnalyst using the search facility.

Access the **Search Equipment / Component** function from the Shell LubeAnalyst menu. Click the **Equipment / Vehicles** heading and then select the **Search / Feedback** subheading.

On the **Search Equipment / Component** screen, select the search criteria which can be used to locate the equipment / component you wish to view and click the **Search** button.
Shell LubeAnalyst will display those items that match your search criteria in a table at the bottom of the screen.

Click the links in the Equipment Name or Component Name columns to view the details of the Equipment and its associated Components.

To view all Equipment and Components, simply click the Search button without specifying any search criteria.

Your search may return more than one page of results. If so, page number links will appear at the bottom right hand corner of the Search Results table. These represent the number of pages returned by the search. To view a different page of the Search Results, simply click on the corresponding page number link. You can click the >> link to go to the last page of the Search Results.

5.5 Viewing Existing Equipment and Components

The properties which have been registered for a piece of equipment and its associated components can be viewed on the View Equipment / Component screen.

You will need to perform a search to access the Equipment / Component properties. Click the Search / Feedback subheading under the Equipment / Component heading on the Shell LubeAnalyst menu. (Please see Searching for Existing Equipment and Components for more information on performing an Equipment / Component Search).
Find the equipment / component for which you wish to view the properties and click the link in the Equipment Name or Component Name columns in the search results table.

You will now see the View Equipment / Component screen which will display the properties for the selected piece of equipment and its components.

The screen is divided into three areas:

- **Customer Properties** – customer details including Customer Name, Site ID, Site Name, Site Address and Country.
- **Equipment Properties** – properties of the selected item of equipment including Equipment Code, Equipment Type, Equipment Manufacturer and Equipment Model. On the right a table displays all the items which are registered for the current Equipment Location.
- **Component Properties** – properties of the components associated to the selected piece of equipment. This includes the Shell Lube Analyst No., Component Type, Test Suite and Lubricant. On the right a table display all the components which are associated to the selected piece of equipment.

Equipment Properties and Component Properties are described in more detail below.

### 5.5.1 Equipment Properties

The Equipment Properties section of the View Equipment / Component screen displays all the equipment properties for the selected piece of equipment.

- **Equipment Location (Eqpmt. Locn.)** – information which identifies the location of the equipment on the site.
- **Equipment Code (Eqpmt. Code)** – A unique identifier used to identify the selected piece of equipment. This code is generated automatically by Shell Lube Analyst when the equipment is first registered.
- **Equipment Type (Eqpmt. Type)** – the type of Equipment.
- **Equipment Name (Eqpmt. Name)** – a description which identifies the piece of Equipment to the customer.
- **Equipment Manufacturer (Eqpmt. Manuf.)** – the manufacturer name of the piece of Equipment.
- **Equipment Model (Eqpmt. Model)** – the model of the piece of Equipment.
On the right a table displays all the items which are registered for the current Equipment Location. The table lists the Equipment Code and Equipment Name of each piece of equipment registered for that Location.

Click the link in the Name column to view the properties for another item of equipment at the current Equipment Location.

At the bottom of the Equipment Properties section there are five buttons:

- **Register New Equipment (Register New Eqpt.)** – Click the Register New Equipment button to register new equipment for the current site. *(Please see Main Data View).*
- **Modify Equipment** – click the Modify Equipment button to modify the properties of the selected equipment. *(See Modifying Existing Equipment and Components for more information.)*
- **Show Equipment Samples (Show Eqpt. Samples)** – click the Show Equipment Samples button to search for all the samples which have been submitted for this piece of equipment. *(See Tracking a Sample for more information.)*
- **Set Sample Frequency** - click the Set Sample Frequency button to select the regular interval between samples for the selected equipment/component. *(See Setting Sample Frequency for more information.)*
- **View Site Details** – click the View Site Details button to view the properties for the selected site. *(See Viewing Existing Sites for more information.)*

### 5.5.2 Component Properties

The Component Properties section of the View Equipment / Component screen displays all the component properties for a selected component associated to the selected piece of equipment.

- **LubeAnalyst No.** – A unique identifier used to identify the selected component. This code is generated automatically by Shell LubeAnalyst when the component is first registered. In your old Shell system this may have been referred to as the e-Quip Number or Shellcare Number.
- **Component Type (Comp. Type)** – the type of Component.
- **Component Name (Comp. Name)** – a description which identifies the Component to the customer.
- **Component Manufacture (Comp. Manuf.)** - the manufacturer name of the Component.
• **Component Model (Comp. Model)** – the model number of the Component.
• **Test Suite** – the group of tests which are performed on samples drawn from this Component.
• **Lubricant** – the lubricant used by this Component.

![Component Model, Test Suite, Lubricant](image)

Click the **Tests** button next to the **Test Suite** text field to view the list of tests which are performed on samples drawn from this component.

To see a detailed description of each test and the procedures followed when performing the test, download the Test Methods and Procedures document available from the **Test Descriptions** option under the **Useful Information** heading. *(Please see Useful Information for more information.)*

On the right, a table displays all the components which have been registered for the selected piece of equipment. The table lists the **Component Code**, and **Component Name** of each piece of equipment registered for that equipment.

![List of Component(s) for Equipment](image)

Click the link in the **Name** column to view the properties for another component registered for the selected piece of equipment.

At the bottom of the **Component Properties** section there are six buttons.

- **Register New Component (Register New Comp.)** – Click the Register New Component button to register a new component for the selected piece of equipment. *(Please see Registering New Equipment and Components for more information.)*
- **Modify Component** – click the Modify Component button to modify the properties of the selected component. *(Please see Modifying Existing Equipment and Components for more information.)*
- **Show Component Samples (Show Comp. Samples)** – click the Show Component Samples button to search for all the samples which have been submitted for this component. *(Please see Tracking a Sample for more information.)*
- **Register Component Samples (Register Comp. Sample)** – click the Register Component Sample button to register a sample for the selected component. *(Please see Registering a New Sample for more information.)*
- **Register Maintenance** – click the Register Maintenance button to record maintenance / feedback for the selected component. *(Please see Adding Feedback for more information.)*
- **Graph** - check this button to view Test Results for selected Tests on a Component, displayed in Graph format. *(See Chart FX for more details).*
5.6 Modifying Existing Equipment and Components

You can modify the Equipment Properties and Component Properties for selected equipment and components from the View Equipment / Component screen.

You will need to perform a search to locate the Equipment / Component you wish to modify. Click the Search / Feedback subheading under the Equipment / Component heading on the Shell Lube Analyst menu. (Please see Searching for Existing Equipment and Components for more information on performing an Equipment / Component Search).

Find the Equipment / Component for which you wish to view the properties and click the link in the Equipment Description or Component Description columns in the search results table.

You will now see the View Equipment / Component screen which displays the properties for the selected piece of equipment and its components.

5.6.1 Modifying Existing Equipment

Click the Modify Equipment button, once you have selected the piece of equipment you wish to modify.

You will now see the Modify Equipment screen. This screen is identical to the form used to register new equipment and components.
Edit the details of the equipment as required in the **Equipment Details** section of the screen. Click the **Submit Form** button to save the changes to the equipment.

A confirmation message will appear to indicate that the equipment details have been saved successfully.

5.6.2 **Modifying Existing Components**

Click the **Modify Component** button, once you have selected the component you wish to modify.

You will now see the **Modify Component** screen. This screen is identical to the form used to register new equipment and components.
Edit the details of the component as required in the Component Details section of the screen. Click the Submit Form button to save the changes to the component.

A confirmation message will appear to indicate that the component details have been saved successfully.

5.7 Registering a New Component for Existing Equipment

The process for registering a new Component for existing Equipment differs slightly from that detailed in Step 2: Registering New Component.

To register a new component for existing equipment:

- **Step 1** – Search for equipment in Shell LubeAnalyst
- **Step 2** – Register New Component from the View Equipment / Component screen.

**Step 1: Search for Equipment**

You will need to perform a search to access the Equipment / Component properties. Click the Search / Feedback subheading under the Equipment / Component heading on the Shell LubeAnalyst menu. (Please see Searching for Existing Equipment and Components for more information on performing an Equipment / Component Search).

Find the equipment for which you wish add a new component and click the link in the Equipment Description in the search results table.
You will now see the View Equipment / Component screen which displays the properties for the selected piece of equipment.

**Step 2: Register New Component**

Click the Register New Component (Register New Comp.) Button to create a new component for the selected piece of equipment.

You will now see the Register Component screen. This screen is identical to that accessed when using the Register link under the Equipment / Vehicles heading. The fields containing the equipment details are automatically populated and cannot be modified.

Enter the details of the component in the Component Details section of the screen. Click the Submit Form button to save the changes to the component.

A confirmation message will appear to indicate that the component details have been registered successfully.
5.8 Feedback

Using Feedback you can register any maintenance tasks undertaken on Equipment / Components. Any maintenance performed on Equipment / Components will be taken into account when the Laboratory Diagnostician examines the sample drawn from the selected component.

You are also able to enter estimates of potential savings due to the planned maintenance vs. unplanned failure (including lost production). This is very important in evaluating the true benefit of Shell Lube Analyst.

Please note the terms Feedback and Maintenance have identical meanings and are used interchangeably in the Shell Lube Analyst web application and user guides.

5.8.1 Adding Feedback

Registering Feedback for a Component is a two-step process.

- Step 1 - Search and view the properties of the Component.
- Step 2 - Register Maintenance for the Component.

Step 1: Search for the Component

You will need to perform a search to access the Component properties. Click the Search / Feedback subheading under the Equipment / Component heading on the Shell Lube Analyst menu. (Please see Searching for Existing Equipment and Components for more information on performing an Equipment / Component Search).

Find the component for which you wish to record maintenance and click the link in the Component Description column in the search results table.

You will now see the View Equipment / Component screen which will display the properties for the selected piece of equipment and its components.
Click the **Register Maintenance** button to register feedback for the selected component.

**Step 2: Register Maintenance**

The purpose of this is to allow you to add your own personal feedback on any maintenance that may have been performed on the equipment / component since the last lubricant sample was sent. This is a useful maintenance history for you and helpful for the Diagnostician and the diagnostic process as it provides an insight into the equipment history.
The Component Maintenance screen is divided into two main parts:

- **Component Properties** – the top part of the screen displays the properties of the component. This includes the Equipment Name, Component Name and Lube Analyst number. Some information regarding the customer is also displayed. This information is automatically populated by Shell Lube Analyst and cannot be modified.

- **Maintenance Information** – the lower part of the screen is the area in which you can record the maintenance which was performed on the component.

Complete the following information to record maintenance for the component:

- **Date** – enter the date of the maintenance task into the Date text box. Click the Calendar button to select the date from a calendar.

- **Maintenance Type** – in the Maintenance Type list box select the maintenance task(s) which were performed on the component. Check the check boxes next to the corresponding maintenance task(s).

- **Estimated Savings** – enter the estimated savings expected from the performing the maintenance task into the Estimated Savings text box.

- **Currency** – in the Currency text box, enter the currency type for the amount entered into the Estimated Savings text box. Use the currency code to represent the currency type e.g. USD, EUR, GBP, RMB.
• **Comments** – enter any comments or remarks you may have regarding the maintenance task which was performed on the component into the **Comments** text area.

Click the Save button to record maintenance for the selected component.

A confirmation message will appear to indicate that the maintenance history has been saved successfully.

### 5.8.2 Viewing and Modifying Feedback

Viewing and modifying Feedback for a Component is a two-step process.

- **Step 1** - Search and locate the Component for which you wish to view maintenance.
- **Step 2** - View and / or modify Maintenance for the Component.

You can view the latest maintenance task which was performed on the Equipment / Component on the Component Maintenance screen.

#### Component Maintenance

<table>
<thead>
<tr>
<th>Customer Name</th>
<th>Site Name</th>
<th>Equipment Name</th>
<th>Site Address</th>
<th>Equipment Location</th>
<th>Equipment Type</th>
<th>Manufacturer</th>
<th>Model</th>
</tr>
</thead>
<tbody>
<tr>
<td>Singapore Drilling</td>
<td>Drill Site 1</td>
<td>Track 2007</td>
<td>123 London Road</td>
<td>HP-O</td>
<td>Engine/Gear HO-CH</td>
<td>Caterpillar</td>
<td>988A</td>
</tr>
</tbody>
</table>

**Maintenance Type**

- Replace Crankshaft or Reconditioned Crankshaft
- Decarbonize System
- Sludge Removal/Flushing
- Varnish Removal
- Repair Leaks
- Overhaul / Rebuild Unit

**Estimated Savings**

- $0

**Currency**

- $0

**Comments**

**Step 1: Search for the Component**

Access the Component Maintenance function from the Shell Lube Analyst menu. Click the Equipment / Component heading and then select the Search / Feedback subheading.
Enter the criteria which can be used to locate the component for which you wish to view the maintenance and click the Search button.

Those components which match the search criteria will appear in the Search Results table.

**Step 2: View and Modify the Feedback for the Component**

To view the feedback for the component:

Find the component for which you wish to view the maintenance and check the radio button in the first column of the search results table.

Click the **Maintenance History** button to view the last maintenance task for the selected component.

The **Component Maintenance** screen is divided into two main parts:

- **Component Properties** – the top part of the screen displays the properties of the component. This includes the Equipment Name, Component Name and LubeAnalyst number. Some information regarding the customer is also displayed. This information is automatically populated by Shell LubeAnalyst and cannot be modified.

- **Maintenance Information** – the lower part of the screen is the area which displays the latest maintenance task which was performed on the selected component.
If necessary, modify the maintenance task information which has been recorded against the component. Click the **Save** button to save the changes.

A confirmation message will appear to indicate that the maintenance history has been saved successfully.

If no changes are required, click the **Back** button to return to the previous screen or simply navigate away from the **Component Maintenance** screen by selecting a different option on the Shell Lube Analyst menu.

### 5.9 Offline Form

The Offline Form can be used to do an offline batch registration of equipment and components. This form is particularly helpful if you wish to register a large number of equipment and components. The Multiple Equipment and Vehicle Registration form makes batch registration of equipment and components easier.

Fill in multiple pieces of equipment and the associated components into the offline form. Email the form to your Administrative Focal Point when you have entered all the information.

Please see 'Contact Us' for more information on finding the contact details of your Administrative Focal Point.

To download the form to your PC:

Access the **Offline Registration Forms** function from the Shell Lube Analyst menu. Click the **Equipment / Component** heading and then select the **Offline Form** subheading.
A link to the offline **Multiple Equipment and Vehicle Registration** form will appear in the main area of the Shell LubeAnalyst screen. Click the link to open the document in a new window.

Click the **Save** button to save the form to your PC. Enter the details of the equipment and component you wish to register into the Excel spreadsheet. Email the completed form to your Administrative Focal Point.
6 Sample Management

Lubricant samples you send to us are tested in one of our dedicated lubricant sample testing laboratories and both the lubricant and Equipment / Component condition are analysed, diagnosed and recommended actions are provided. This information is then collated by Shell Lube Analyst into a user friendly report which you can view through the Sample Management module.

6.1 Completing the Sample Label

The Sample Label is the physical label that is attached to the physical sample which is sent to the Laboratory. The sample form contains the information we require from you to enable us to perform the required tests, diagnosis and associate the results to the equipment and component in the database. In the case of both standard and advance forms the bottle label is a tear-off section of the form which has the sample number on it and ties the bottle back to the paper form. The labelled sample bottle and the respective form should both be sent to the laboratory in the packaging provided. There are two types of Sample forms/ labels: one for the Standard service and Advanced service.

After the Sample has been taken, please check to make sure that the Sample bottle is sealed tightly and cannot leak while in transit. Check that the Sample label has been securely attached to the bottle. Put both the labelled Sample bottle and the Sample form into the envelope provided and send it to your Laboratory.

6.1.1 Standard Sample Labels

There are two types of Standard service each with its own Labels: Transport and Industry in Kit 1 and Kit 2. The labels are similar with the only difference appearing in the Equipment Type section. The difference between the two labels is outlined below.

The Sample Number on the form is the sample number that you will enter into Shell Lube Analyst when registering the sample. Please make note of this number. (Please see Registering a New Sample for more information.)

The following information should be completed on the Standard Service Label:

- **Shell Lube Analyst number** – the Shell Lube Analyst number is the unique identifier that is assigned to the component when it is registered in Shell Lube Analyst. You can find this number by viewing the component properties in Shell Lube Analyst. (Please see Viewing Existing Equipment and Components for more information.)
- **Customer / Login number** – your Shell LubeAnalyst user ID.
- **Customer Name** – your company name.
- **Equipment Description** – a descriptive name which identifies the piece of equipment.
- **Equipment Reference ID** – a reference number which identifies the piece of equipment.
- **Equipment location** – information which identifies the location of the equipment on the site.
- **Equipment type** – the equipment type. Check the corresponding check box to indicate the type of equipment the sample was drawn from. The selected Equipment Type will determine the Test Suite which is used to test the Sample.
  - **Transport** – on the Transport Standard Pre-Paid Sample Label the following equipment type options are available: *Engine, Gear box, Right Red. Gear, Left Red. Gear, Front Axle, Rear Axle, Hydraulic, Transfer box.*
  - **Industry** – on the Industry Standard Pre-Paid Sample Label the following equipment type options are available: *Marine / Medium Speed Engine Diesel, Gas Engine, Gear, Circulating System, Hydraulic, Aviation Piston Engine, Turbine, Compressor.*
- **Lubricant** – the Lubricant used by this component.

The following fields can be completed to provide the Diagnostician with more detailed information regarding the sample:
- **Equipment Life** – the current equipment / component life which can be measured in units of time or distance.
- **Lubricant Life** – the current lubricant life which can be measured in units of time or distance.
- **Top Up Volume** – the amount of lubricant which has been added since the last sample was drawn.
- **Date Drawn** – the date the sample was drawn from the component.

On the stub of the label complete the Date Drawn, Shell LubeAnalyst number, Equipment Ref ID and Description fields for your own reference.

### 6.1.2 Advanced / Premium Sample Form and Labels

The Advanced Sample Label form is divided into 5 parts or steps.

- **Step 1:** Your Company Details
- **Step 2:** Your Equipment & Component Details
- **Step 3:** Your Sample Details
- **Step 4:** Maintenance History
- **Step 5:** Postage

The Sample Number at the bottom of the form is the sample number that you will enter into Shell LubeAnalyst when registering the sample. Please make note of this number.
*(Please see Registering a New Sample for more information.)*

The following information must be completed under each step of the Advanced Sample Label:

- **Step 1:** Company Details
  - **Company name** – your company name.
  - **Location** – your company location e.g. city and country.
  - **Contact Name** – your name.
Telephone Number – your telephone number.

**Step 2: Your Equipment & Component Information**

- **LubeAnalyst Number** - the Shell LubeAnalyst number is the unique identifier that is assigned to the component when it is registered in Shell LubeAnalyst. You can find this number by viewing the component properties in Shell LubeAnalyst. *(Please see for more information.)*

- **Lubricant** - the Lubricant used by this component.

The following fields can be completed to provide the Diagnostician with more detailed information regarding the sample:

**Step 3: Your Sample Details**

- **Equipment Life** - the current equipment / component life which can be measured in units of time or distance.

- **Lubricant Life** – the current lubricant life which can be measured in units of time or distance.

- **Top Up Volume** – the amount of lubricant which has been added since the last sample was drawn.

- **Date Drawn** – the date the sample was drawn from the component.

**Step 4: Maintenance History**

- Tick the maintenance tasks which have been performed on the component since the last sample was drawn.

The Advanced / Premium service offers you the flexibility to select the Test Suite you wish to be run on each Sample sent to the Laboratory. Enter the Test Suite code and any additional options into the Test Suite field and Additional test options fields under Step 3: Your Sample Details on the premium form.

### 6.2 Registering a New Sample

Samples can be registered prior to dispatching them to the laboratory. It is important to provide as much information as possible regarding the component the sample was drawn from. This includes maintenance activities completed since the last sample on the Component and any major lubricant changes or top ups you have made. This information will help the diagnostician to make an accurate assessment of the condition of your equipment / component and the lubricant.

Access the Register Sample function from the Shell LubeAnalyst menu. Click the Sample Management heading and then select the Register subheading.

You will now see the Register Sample screen.
To register a sample in Shell Lube Analyst you must provide the sample number. Enter the sample number into the **Sample No** text field on the screen.

This number can be found on the sample form and bottle label which you will attach to the physical sample being sent to the Laboratory. (*Please see Completing the Sample Label for more information.*)

Select the component and the equipment the sample was drawn from on the **Equipment / Component Name (Equip. / Comp. Name)** drop down menu.

When you have selected the component Shell Lube Analyst will retrieve the following information from the database and populate the relevant information in the corresponding text fields.

- **Lube Analyst No.** – the Shell Lube Analyst number of the selected component. The Shell Lube Analyst number is the unique identifier that is assigned to the component when it is registered in Shell Lube Analyst.
- **Registered Lubricant** – the lubricant which has been registered against the component in Shell Lube Analyst. This is the lubricant in use at the time of first registration.
- **Lubricant in Use** – the actual lubricant being used in the component. This should be the same as the registered lubricant but can be edited as required. It is important that the Lubricant is updated if you substitute the existing product with a new one as we use the fresh data for the Lubricant to check its condition.
- **Test Suite** – the test suite you wish to be performed on the sample drawn from this component. This can be edited here if you wish for a different test suite to be performed on this particular sample.

Other information which can be entered includes:

- **Equipment Life** – the current equipment / component age / life which can be measured in units of time or distance e.g. 250 hours or 15,000 km.
- **Lubricant Life** – the current lubricant life which can be measured in units of time or distance e.g. 500 hours or 15,000km. This is the actual in service time planned for the product.
- **Top Up Volume** – the amount of lubricant which has been added since the last sample was drawn. This can also be measured in units of time (amount of top up lubricant per minute, day, month or year) e.g. 22 litres since last sample. This is important information for the Diagnostician. Additive and wear metal measurements will be altered by this top up value and comments may not accurately reflect the real situation if this information is not provided.
- **Date Drawn** – the date the sample was taken from the component. Click the Calendar button to select the date from a calendar.
- **Purchase Order No.** – your purchase order number or budget code for the sample. This will be used for invoicing purposes.

Click the **Submit** button to register the sample in Shell LubeAnalyst.

Click the **Submit & Print** button to register the sample in Shell LubeAnalyst and produce a Sample Label. The Sample Label appears in another window, displaying the sample details.

A confirmation message appears to indicate that the sample has been submitted successfully.

After the Sample has been taken, please check to make sure that the Sample bottle is sealed tightly and cannot leak while in transit. Check that the Sample label has been securely attached to the bottle. Put both the labelled Sample bottle and the Sample form into the envelope provided and send it to your Laboratory.
It is very important that you use the materials and kits provided with the Shell Lube Analyst service. The materials provided by Shell are specially designed for the tests conducted and equipment used at Lube Analyst laboratories. If you use your own materials this may cause a delay in the service and may increase your costs.

6.3 Tracking a Sample

After a sample has been submitted to Shell Lube Analyst and sent to the Laboratory you will be able to track its status using the Track facility.

Samples which have not been registered by the customer in the Shell Lube Analyst web application will be registered by the Technician at the laboratory. You can also track these samples once they have arrived at the laboratory and have been entered into Shell Lube Analyst by the Technician. You will be able to track the Sample through the various stages of processing in the lab through to completion.

If you are concerned about a particular sample you should call your Shell Lube Analyst Administrative Focal Point who will be able to provide you with more information. (Please see Contact Us for more information on contacting your Administrative Focal Point.)

Access the Track Sample function from the Shell Lube Analyst menu. Click the Sample Management heading and then select the Track subheading.

On the Track Sample screen, enter the search criteria which can be used to locate the sample you wish to track and click the Search button.

Shell Lube Analyst displays those items that match your search criteria in a table at the bottom of the screen.
You will be able to perform different operations from the Search Results table depending on the status of the sample listed in the Sample Status column.

- **Waiting** – Waiting is the status allocated when the sample has not yet arrived at the Laboratory. If the sample status reads **Waiting** you will be able to view and/or modify the registration information which was submitted with the sample. Click the link in the Sample No. column to view and/or modify the registration information. *(Please see Modifying a Sample Registration for more information.)*

- **Testing** – Testing means the sample has arrived at the laboratory. It has been accepted in the system and the various tests are being performed at this time. If the sample status reads **Testing** you will only be able to view the registration information which was submitted with the sample. Click the link in the Sample No. column to view the registration information.

- **Reviewing** – Reviewing means that testing is complete. The diagnostician has received the test data and is reviewing the diagnosis, adding comments and producing your report. If the sample status reads **Reviewing** you will be able to view the Sample Report. Click the link in the Sample No. column to review the report. *(Please see Viewing a Sample Report for more information.)*

- **Reported** – Reported means the process has completed and the report has been dispatched to the Web and or email, fax or post. If the sample status reads **Reported** you will be able to view the Sample Report. Click the link in the Sample No. column to review the report. *(Please see Viewing a Sample Report for more information.)*

Your search may return more than one page of results. If so, page number links will appear at the bottom right hand corner of the Search Results table. These represent the number of pages returned by the search. To view a different page of the Search Results, simply click on the corresponding page number link. You can click the >> link to go to the last page of the Search Results.

### 6.4 Modifying a Sample Registration

After a registering a sample in Shell Lube Analyst you can modify this information on the **Modify Sample** screen.

The ability to modify registration information is only available while the status of the sample is set to **Waiting**. Once the Laboratory Technician has begun testing the sample registration information can no longer be modified in Shell Lube Analyst.
You will need to perform a search to locate the Equipment / Component you wish to modify. Click the **Track** subheading under the **Sample Management** heading on the Shell Lube**Analyst** menu. (Please see **Tracking a Sample** for more information.)

Click the link in the **Sample No** column in the Search Results table to view the details of the submitted sample.
You will now see the **Modify Sample** screen.

![Modify Sample Screen](image)

On the **Modify Sample** screen edit the information as required and click the **Submit** button to resubmit the sample registration. Alternatively click the **‘Submit & Print’** button to save the modifications to the Sample and produce a Sample Label.

A confirmation message will appear to indicate that the details have been saved successfully.

**6.5 Viewing a Sample Report**

Sample reports can be opened and viewed from the **Track Sample** screen.

You may need to perform a search to locate the Equipment / Component you wish to modify. Click the **Track** subheading under the **Sample Management** heading on the Shell LubeAnalyst menu. *(Please see Tracking a Sample for more information.)*

You may also access sample reports which have been produced since your last login from the **Sample Results** home screen. Those samples that have been processed since your last login will appear in a table on the Sample Results home screen.
Please note: you will only be able to view reports for those samples with a Sample Status of Reported.

Click the sample number link in the Sample No column to review the associated report. The report will open as a PDF in a new window.

To view multiple reports, select the check boxes in the first column of those sample reports you wish to review and then click the Show Sample Reports button.

Please note: selecting multiple reports may increase processing time and the reports may take some time to open on your PC.

In Acrobat Reader, click the Save button to save the report to your PC. Click the Print button to print the report.

6.6 Interpreting the Sample Report

There are three types of Sample Reports that you can receive. The type of Sample Report produced depends on the sample registration – normal or ad-hoc sample, and the test suite selected for the sample – standard of advanced.

The Report is divided into two main parts, Report Properties and Report Results.
Report Properties displayed include:

- **Sample Status Indicator (Traffic Light)** - This status symbol represents the diagnosed condition of the sample. **Action** means requires action, **Caution** means requires attention, **Monitor** means monitor the equipment/component carefully until next Sample, and **Normal** means continue to take samples as usual.

- **Report Properties** – information about the sample, equipment / component and customer including:
  - **Sample Properties** – Sample Number
  - **Equipment / Component Properties** – LubeAnalyst Number, Equipment Name, Component Type and Description, Component Reference ID, Lubricant Name
  - **Subscriber Properties** – Subscriber Name, Subscribing Party (customer name) and Subscriber Address.

- **Shell Contacts** – contact details for your Administrative focal point, your Shell LubeAnalyst web address and your user ID.

- **Comments** – remarks that have been made by the Laboratory Technician or Diagnostician. These may be diagnostic issues, recommendations or general feedback.
6.6.1 Standard Report

This report is produced for all samples which were tested using a standard test suite (Test Kit 1 – Transport and Off-Highway and Test Kit 2 – Industrial).

The Results information displayed from testing of the sample include:

- **Results Table** – a table displays the tests which have been performed on the sample and the results from the last three samples. The results from the most recent test are displayed in the last column in bold.

- **Graphs** – trended graphs show critical diagnosis areas for lubricant and component failures and properties. The last six results are displayed in the graphs.

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6.6.2 Advanced Report

This report is produced for all samples which were tested using advanced and premium test suites.

The Results information displayed from testing of the sample include:

- **Graphs** – the graphs section displays trended graphs which show critical diagnosis areas for lubricant and component failures and properties.
• **Results Table** – the results table displays the tests which have been performed on the sample and the results from the last six samples. The results from the most recent test are displayed in the last column in bold.

### 6.6.3 Ad-hoc Report

This report is produced for all samples which are marked **Ad-hoc**. It is similar to the standard report except there are no graphs as there are no other sample results for comparison or trending.
**Results Table** – the results table displays the tests which have been performed on the sample and the results from ad-hoc sample.

### 6.7 Sample Frequency

Shell LubeAnalyst has a helpful feature which reminds you when the next critical Sample is due to be taken from a Component.

You set the **Sample Frequency** on your Component (daily, weekly, monthly etc), and then Shell LubeAnalyst calculates the date when you should take the next sample. To calculate this date, Shell LubeAnalyst uses the date of the previous sample and the Sample Frequency to give the date when the next Sample should be taken from the Component. (see 6.7.2 ‘Date Next Sample Due’).

#### 6.7.1 Setting Sample Frequency

Select **Sample Management** and **Frequency** from the Menu Tree. This will open the **Sample Frequency** screen in the right hand frame, containing a table displaying all your **Equipment / Components** and the date on which the next sample is due to be taken from each Component.
At the top of the screen is the ‘Site Name’ dropdown. If you are associated to one Site only, the dropdown will contain the name of that site. If you are associated to multiple sites, you will need to select the required Site from the dropdown. Once a Site is selected, the grid populates with the Site’s Equipment / Component.

The grid contains a column entitled ‘Sampling Reminder’, which is split into two. This determines when you will receive the reminder to take the Sample. To set the frequency of Sampling for a particular component, select the required frequency from the dropdown (days, weeks, months, quarterly, etc) and enter the number of days/weeks/months etc into the box to the left, then press ‘Save’.

The Last Sample Date Drawn column is automatically populated on completion of your most recent Sample. Shell LubeAnalyst will calculate the date when the next sample should be taken, based on the sampling interval frequency set, and the ‘Date Next Sample Due’ will be adjusted to show the date you will need to take the next Sample from the Component. (See Date Next Sample Due for more information).

You will see that four of the columns in the table are hyperlinked – Equipment Ref ID, Equipment Description, Component Name and LubeAnalyst No. Clicking on any of these opens the View Equipment / Component screen.

If you make any modifications to the details on the Sample Frequency screen, you have the option to press the ‘Save & Print’ button, which saves your modifications and also produces a Sample Label in a new window, which you can check and Print if required.

### 6.7.2 Date Next Sample Due

The ‘Date Next Sample Due’ column in the data grid gives the date when you should next take a scheduled Sample from the Component. Shell LubeAnalyst calculates this date based on the Date Drawn of the last Sample taken from the Component and the Sample Frequency that has been set. So, if you set the Sample Frequency for the Component to 60 days and the Component’s latest Sample Date Drawn is ‘27/10/2009’, then after Save, the ‘Date Next Sample Due’ will be 27/10/2009 + 60 days. You can reset the ‘Date Next Sample Due’ using the Date Picker.

The ‘Date Next Sample Due’ date calculation includes weekends also. One Month will be considered as one calendar month and one Quarter will be considered as one calendar three-month period. One year will be considered as one calendar year. If you do not set a Frequency for the Component, Shell LubeAnalyst will automatically set the frequency to Monthly for that Component.

If a Component does not have any Samples registered, then ‘Date Next Sample Due’ will be calculated from the date when the Component is registered in the system.

### 6.8 Sample Reminder

Once you have set the frequency at which you wish to take samples from a Component, you can choose to receive a reminder email from Shell LubeAnalyst to ensure that none of your critical Samples are overlooked.

To select the frequency at which you wish to receive reminder emails, open the Sample Reminder screen by using ‘Reminder’ option under Sample Management. You can also use this screen to switch off the Reminder emails if you do not wish to receive them for all your Sites, or for specific Sites only.
6.8.1 Setting Sample Reminders

At the top of the screen is a dropdown, **Frequency of Sampling Reminders**, which contains options 'Weekly' or 'Monthly'. This is where you set the preferred interval at which **Reminder emails** are sent to you. If set to 'Weekly', you will receive reminder emails at 9.00 am local time on Monday morning. Monthly email reminders are despatched at 9.00 am local time on the first day of each month.

On the **Sample Reminder** screen, the table contains the names of all the Sites to which you are associated, together with columns headed 'Site Reminder' and 'My Reminder', both of which are set to either 'On' or 'Off'.

Customers who do not have Administrator permissions will find that Site Reminder will remain disabled, but they are able to switch on **My Reminder** by selecting 'On' from the dropdown for each Site. This will activate the Sample Reminder emails at the frequency set in the 'Frequency of Sampling Reminders' dropdown.

Customers with Administrator permissions will find that Site Reminder will be enabled, allowing them to switch off **Site Reminder** for certain Sites, if required.

6.9 Sample Scheduler

The Shell LubeAnalyst Scheduler provides you with a report of all Samples which are already overdue, together with those which will shortly require a Sample to be taken.

The Shell LubeAnalyst Scheduler function gives you a quick and easy way to make sure that taking of Samples is as efficient as possible, whilst also ensuring that no critical Samples are overlooked.

6.9.1 Using the Sample Scheduler

To access Shell LubeAnalyst Scheduler, select **Sample Management** from the Menu Tree, then **Scheduler**. Alternatively, use the Sampling Scheduler icon on the Home screen. The Sampling Scheduler screen opens displaying a list of all Components from which a Sample is due to be taken.
At the top of the screen is the **Sample Reminder Frequency** dropdown, from which you can select the frequency of Day(s), Week(s), Month(s), Quarter(s), Year(s), allowing you to select to see in the grid only the Samples to be taken at the chosen frequency.

Below the **Sample Reminder Frequency** dropdown is the **Site Name** dropdown, allowing you to select whether you wish to view upcoming Samples for all of your Sites, or for just one particular Site.

The table contains details of Components from which Samples are due to be taken, together with those which are overdue. This **Scheduler report** can be printed out and will be a useful tool for your Lubricant Engineer as he takes the Site’s regular, scheduled Samples, ensuring that any critical Samples will not be overlooked. The report is also a useful record of when Samples are taken from a particular Component.

To the right of the table is the column **‘Action Taken’** which contains checkboxes. Click into the checkbox to indicate that the Sample has been taken and **Shell Lube Analyst** will capture that and ensure that subsequent email reminders are not sent out for the Component. The Component will continue to be displayed in the table even after you have checked the **Action Taken** checkbox. It will be removed from the grid when the next Sample is registered for this Component.

The items in the columns **Equipment Description, Component Name and LubeAnalyst Number** are hyperlinked and clicking on any of these items will open the **View Equipment / Component** screen (see Section ‘Setting Sample Frequency’).

If you make any modifications to the details on the **Sample Scheduler** screen, you have the option to press the **Save & Print** button, which saves your modifications and also produces a **Sample Label** in a new window, which you can check and **Print** if required.

The **Last Sample Date Drawn** column is automatically populated on completion of your most recent Sample. **Shell LubeAnalyst** will then calculate the date when the next sample should be taken, based on the sampling interval frequency set, and the **‘Date Next Sample Due’** will be adjusted to show the date you will need to take the next Sample from the Component. (See **Date Next Sample Due for more information**).
7 Failure Analysis

A valuable part of Shell LubeAnalyst is the ability to easily monitor and review overall performance of Equipment & Vehicles, Components and Lubricants. Using the Failure Analysis module it is possible to track the performance of a site, location, or even a piece of equipment or specific component. The comparisons can also be across locations, departments and equipment types. This type of benchmarking is an invaluable aid to and can help drive maintenance strategy improvements.

The Failure Analysis report is divided into three main parts:

- **Traffic Light Report (Statistics)** – a summary of the diagnosed conditions (Action, Caution, Monitor or Normal) of processed samples. These statistics are displayed in a table and as a bar chart.
- **Diagnostic Issues Table (Tables)** – a table indicating the diagnostic issues which have been detected in processed samples.
- **Diagnostic Issues Graph (Graphs)** – a pie chart displaying the detected failure modes as percentage of the total selected in a graphical format.

Using Sample Reports and Failure Analysis reports to focus on specific equipment components, these reports become powerful aides in analysing overall performance.

7.1 Generating a Failure Analysis Report

Access the Failure Analysis function from the Shell LubeAnalyst menu. Click the Failure Analysis heading.

You will now view the Failure Analysis screen.
On the **Failure Analysis** screen, select the criteria which will be used to generate the report. You can use these criteria to restrict the report to a category of interest. View the Failure Analysis for a Customer, Site, Site Location, piece of equipment or specific component. You can also view the Failure Analysis for a specified time period.

Criteria which may be used to generate the report include:

- **Customer Name** – the customer / company.
- **Site Name** – the site name.
- **Equipment Location** – the location of the equipment on the site.
- **Equipment Name** – a description which identifies the piece of equipment.
- **Component Name** – a description which identifies the component.
- **LubeAnalyst No.** – the unique identifier for the equipment.
- **Date** – the date range for which you wish to view failure analysis information. Click the Calendar button to select the date from a calendar.

Report options which can be configured include:

- **Statistics** – ensure the Statistics check box is checked to view the Traffic Light Report.
- **Tables** – ensure the Tables check box is selected to view a table of the Diagnostic Issues Table for the sample range.
- **Graphs** – ensure the Graphs check box is selected to view a pie chart of the Diagnostic Issues for the sample range.

Click the **Show Reports** button to display the Failure Analysis.

Shell LubeAnalyst will display the Failure Analysis Report for the selected criteria.
To view the Failure Analysis Report for all the samples in Shell Lube Analyst, simply click the **Show Reports** button without specifying any report criteria.

### 7.2 Interpreting the Failure Analysis Report

#### 7.2.1 Traffic Light Report (Statistics)

The Traffic Light Report is a summary of the diagnosed conditions of processed samples. These statistics are displayed in a table and as a bar chart.

A table displays the tally for each type of condition.

- **Action** – those samples which required action.
- **Caution** – those diagnosed samples which required attention.
- **Monitor** – those diagnosed samples which require close monitoring.
- **Normal** – those diagnosed samples which were normal.
- **Unknown** – those samples to which the Diagnostician has been unable to allocate a Sample Condition.
A bar chart displays the tally for each type of condition in a graphical representation. It displays the percentage amount each type of condition contributes to the total.

### 7.2.2 Diagnostic Issues (Tables and Graphs)

Along with the sample condition every **Amber** (Caution) and **Red** (Action) sample is marked with a Diagnostic Issue. These Diagnostic Issues indicate the underlying reason why the sample was diagnosed as Action or Caution, in other words what the problem is and therefore what needs to be investigated.

The Diagnostic Issues Report lists the diagnostic issue types and their tallies in a table sorted in a most common to least common order.

#### Table of Diagnostic Issues

<table>
<thead>
<tr>
<th>Diagnostic Type</th>
<th>Found</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lower Engine Wear</td>
<td>1</td>
</tr>
<tr>
<td>Upper Engine Wear</td>
<td>1</td>
</tr>
<tr>
<td>Main Bearing/Connecting Rod Wear</td>
<td>1</td>
</tr>
</tbody>
</table>

The same information is displayed as a pie chart in a graphical format.
8 Material Ordering

Shell LubeAnalyst has a simple to use ordering tool which can be used to order sampling materials and kits. This tool is a type of shopping cart system that you may have used on other websites.

Sampling materials and kits that are clean and dedicated are required to collect samples for Shell LubeAnalyst. Shell has a complete range of sampling materials that can be used in all types of lubricant sampling.

It is very important that you use the materials and kits provided with the Shell LubeAnalyst service. The materials provided by Shell are specially designed for the tests conducted and equipment used at LubeAnalyst laboratories. If you use your own materials this may cause a delay in the service and may increase your costs.

8.1 Placing an Order

Access the Place Material Order option by clicking the Material Ordering heading in the Shell LubeAnalyst menu and then select the Order subheading.

You will now see the Place Material Order screen.
In the top half of the **Place Material Order** screen your customer details have been automatically completed in the relevant fields. This includes your company name, your name and contact details, your delivery address and your assigned Laboratory.

If you have more than one site registered in Shell LubeAnalyst, you can specify the site that the order is delivered to on the **Site Name** drop down menu. The delivery address will correspond to the site address.

In the bottom half of the screen, you can add items to your order, specify special instructions for the order or add an alternate delivery address.

### 8.1.1 Adding Items to your Order

To add items to your order:

1. Enter a quantity into the text box.

Select the item you wish to order on the drop down menu.

Click the **Add Item** button to add the item to your order.

Repeat steps 1-3 until you have added all the items you require to your order.
8.1.2 Finalising your Order

To finalise your order:

2. Enter your purchase order number into the **Customer Order No.** text box. This is a required field.

   *If you do not have a purchase order number, please enter your full name into this box to indicate order approval.*

If you have special instructions enter these into the **Special Instruction** text area.

If you require a different delivery address, check the **Alternate Delivery Address** check box and enter the alternate address into the text area.

   *You may wish to use the **Alternate Delivery Address** field to detail a more specific delivery address for your order. You will need to enter the full address into this text area.*

Click the **Submit Order** button to submit the order.

Read the **Place Material Order – Terms and Conditions** and click the **OK** button.

The order is submitted to Shell for processing and is subject to a credit check.

You will receive an email confirmation of your order which will detail the items you have ordered and the delivery address you have selected. It is important to check this information and contact your Administrative Focal Point if an error has been made. (*Please see Contact Us for more information on contacting your Administrative Focal Point.*)

Your order will be delivered to you within agreed contract turn around times.

8.2 Searching Orders

After you have submitted a material order you will be able to track its status using the search facility.
Access the **Search Material Order** function from the Shell LubeAnalyst menu. Click the **Material Ordering** heading and then select the **Search** subheading.

On the **Search Material Order** screen, select the search criteria which can be used to locate the order you wish to view and click the **Search** button.

Criteria which may be used to search includes:

- **Order Ref. No.** – the unique reference number which was assigned by Shell LubeAnalyst.
- **Customer Order No.** – your own purchase order reference number for the order.
- **Status** – the status of the order in the system. This may be **Received** (Shell has received the order), **To be released** (Shell has filled the order and it is ready for dispatch), **Dispatched** (the order is on its way to you), or **Cancelled** (the order has been cancelled by you).
- **Date From and Date To** – enter a date range to find all orders submitted within a specific date range. Use the **Calendar** button to select the date on the calendar.

Shell LubeAnalyst will display those items that match your search criteria in a table at the bottom of the screen.
Click the link in the **Order Ref. No.** column to view the details of a selected order.

To view all material orders, simply click the **Search** button without specifying any search criteria.

Your search may return more than one page of results. If so, page number links will appear at the bottom right hand corner of the **Search Results** table. These represent the number of pages returned by the search. To view a different page of the Search Results, simply click on the corresponding page number link. You can click the **>>** link to go to the last page of the Search Results.

8.3 **Viewing an Order**

The information submitted for an order can be viewed on the **View Material Order** screen.

You will need to perform a search to find the material order you wish to view. *(Please see Searching Orders for more information.)* When the search has completed, click the link in the **Order Ref. No.** column in the Search Results table to view the details of a selected order.

![View Material Order Screen](image)

In the top half of the screen you can view the customer details assigned to your order. This includes your company name, your name and contact details, your delivery address and your assigned Shell Laboratory.

In the bottom half of the screen you can view the items and quantities you have ordered.

Please note you are not able to modify the order in Shell LubeAnalyst once it has been submitted. If you wish to change your order or have any queries regarding the order please contact your Administrative Focal Point. *(Please see Contact Us for more information on contacting your Administrative Focal Point.)*

8.4 ** Cancelling an Order**

After an Order has been placed it is possible for you to cancel it. Navigate to the **View Material Order** screen for the selected Order. *(See ‘Searching Orders’ for more information on how to locate the Order.)*

You will now see the **Cancel Order** button at the bottom of the screen.
To cancel the Order, press the **Cancel Order** button.

Message ‘**Order is Cancelled successfully**’ appears at the top of the screen and Cancel Order button becomes disabled.

Order will be cancelled and will not be processed any further. You can search for **Cancelled Orders** using Search functionality and selecting Status ‘**Cancelled**’. *(See Searching Orders for more information)*.
9 User Details

Using the facilities located under the User Details menu of Shell Lube Analyst you can:

- Register new users and modify existing users.
- Change your password.
- Configure your Shell Lube Analyst user preferences.

Please note the terms User and Subscriber have identical meanings and are used interchangeably in the Shell Lube Analyst web application and user guides.

9.1 Registering a New Subscriber

Access the Register Subscriber function from the Shell Lube Analyst menu.

Click the User Details heading and then select the Register subheading.

You will now see the Register Subscriber screen.
The Register Subscriber screen is divided into three parts:

- **Customer Details** – your company name and address. This information is automatically completed by Shell Lube Analyst and cannot be modified.

- **Site Details** – the site that the user will be assigned to when registered in Shell Lube Analyst.

- **Subscriber Details** – the new user who will be using Shell Lube Analyst. Their duties will include maintaining equipment / components and registering samples in Shell Lube Analyst.

To register a new subscriber:
1. Select the site to which you wish to assign the user from the **Site Name** drop down menu in the **Site Details** area of the screen.

2. The **Address** and **Country** details for the site will automatically completed by Shell LubeAnalyst.

3. In the **Subscriber Details** section of the screen complete the following fields:
   - **Subscribing Party** – is the name of the customer (company) to which the new subscriber is associated. Enter the name of the customer (company) into the **Subscribing Party** text box.
   - **Language** – the default language will be automatically selected by Shell LubeAnalyst. Ensure that the language is correct on the **Language** drop down menu.
   - **Contact Name** – the name of the new subscriber. Enter the name of the new subscriber into the **Contact Name** text box.
   - **Country** – the customer’s country will be automatically selected by Shell LubeAnalyst. Ensure that the country is correct on the **Country** drop down menu.
   - **Phone** – the phone number of the new subscriber. Be sure to enter the country and area codes for the phone number into the **Phone** text box e.g. +99 9999 9999
   - **Email** – the email address of the new subscriber. Enter the email address of the new subscriber into the **Email** text box.
On the right of the Subscriber Details section of the screen you can specify preferences for report delivery. These preferences include:

- **Report Route** – indicate whether you wish to receive the report via post, fax or on the web. Check the **Post**, **Fax** or **Web Access** check boxes. Also specify what format you wish the report to be produced. Check the **PDF Email**, **Text Email**, **Excel Email** or **CSV Email** check boxes.

- **Mode for Red-Sample** – set the response which will occur when a sample is diagnosed “**Red – requires urgent attention**”. You can choose to be faxed or emailed these Red-Sample reports. You can also decline a response for Red samples. Select **None**, **Email** or **Fax** on the **Mode for Red-Sample** drop down menu.

- **Red Sample Email** – the email address which Red-Sample reports will be emailed to if you have selected email on the **Mode for Red-Sample** drop down menu. This field will be automatically completed when **Email** is selected on the Mode for Red-Sample drop down menu. Edit the email address as required.

Click the **Submit Form** button at the bottom of the screen.

A confirmation message will appear to indicate that the subscriber has been registered successfully.

### 9.2 Searching Existing Subscribers

After you have created a subscriber you will be able to find the subscriber in Shell Lube Analyst using the search facility.

Access the **Search Subscriber** function from the Shell Lube Analyst menu. Click the **User Details** heading and then select the **Search** subheading.

On the **Search Subscriber** screen, enter the search criteria which can be used to locate the subscriber you wish to view and click the **Search** button.
Shell LubeAnalyst will display those items that match your search criteria in a table at the bottom of the screen.

![Search Subscriber Table](image)

Click the link in the Contact Name column to view the details of a selected subscriber.

To view all subscribers, simply click the Search button without specifying any search criteria.

Your search may return more than one page of results. If so, page number links will appear at the bottom right hand corner of the Search Results table. These represent the number of pages returned by the search. To view a different page of the Search Results, simply click on the corresponding page number link. You can click the >> link to go to the last page of the Search Results.

**9.3 Viewing an Existing Subscriber**

Subscriber properties can be viewed on the View Subscriber screen.

You will need to perform a search to find the subscriber you wish to view. *(Please see Searching Existing Subscribers for more information.)* When the search has completed, click the link in the Contact Name column in the Search Results table to view the details of a selected subscriber.
The screen displays the subscriber properties including the Subscribing Party, Contact Name, Contact Address, Phone, Email, Language and Subscriber Type.

At the bottom of the screen there are three buttons:

- **Register New Subscriber** – click the Register New Subscriber button to register a new subscriber. *(Please see Registering a New Subscriber for more information.)*

- **Modify Subscriber** – click the Modify Subscriber button to modify an existing subscriber. *(Please see Modifying an Existing Subscriber for more information.)*

- **Show Associations** – click the Show Associations button to view the subscriber’s associations. *(Please see Subscriber Associations for more information.)*
9.3.1 Subscriber Associations

The Subscriber Associations screen shows the associations and permission settings for a LubeAnalyst user.

In the Customer Associations table you can view the customer account(s) to which the selected user is assigned. The user will be able to view certain information regarding these customers depending on their Subscriber Type (this determines their level of access).

In the Site Associations table you can view the site(s) to which the selected user is assigned. The user will be able to view certain information regarding these sites depending on their Subscriber Type. The Equipment Name, Components Code, Component Name columns will show the level of permission the user has to view and modify equipment and components at that particular site.

Please note: this screen controls your access to the Shell LubeAnalyst. Do not modify any values on this screen unless advised to do so by a Shell LubeAnalyst System Administrator. You may remove your access to the program if you change the information on this screen.

For certain Users, depending upon their Subscriber Type and level of access, the Remove All and Remove Selected buttons may be visible and enabled.

Use the Remove All button to remove association to all Customers/Sites, Equipment & Components in the Customer hierarchy.

Use the Remove Selected button to remove selected association only. So you can remove an association to a Customer whilst retaining association to one or more of its Sites.

9.4 Modifying an Existing Subscriber

You can modify the properties for a selected subscriber on the Modify Subscriber screen.
You will need to perform a search to locate the subscriber you wish to modify. Click the **Search** subheading under the **User Details** heading on the Shell Lube **Analyst** menu. *(Please see Searching Existing Subscribers for more information on performing a subscriber search.)*

Find the subscriber you wish to modify and click the link in the **Contact Name** column in the search results table.

You will now see the **View Subscriber** screen which displays the properties for the selected subscriber.

Click the **Modify Subscriber** button.

You will now see the **Modify Subscriber** screen. This screen is identical to the form used to register new subscribers.
Edit the details of the subscriber as required in the **Subscriber Details** section of the screen.

Click the **Submit Form** button at the bottom of the screen to save the changes you have made to the subscriber.

A confirmation message will appear to indicate that the subscriber details have been saved successfully.

### 9.5 Changing your Password

If necessary, you can change your password using the **Change Password** option.

Access the **Change Password** function from the Shell LubeAnalyst menu. Click the **User Details** heading and then select the **Password** subheading.

Your new password **MUST** meet the following criteria:

- Be different to the last five passwords you have used.
- Be between 8 – 10 characters in length.
- Contain at least 1 numeric digit. e.g. 1, 2, 3
- Contain at least character. e.g. a, b, c
- Contain at least one of the following special characters – `&`, `*`, `$`, `%`, `+`, `@`, `?`, `/`, `\`, `|`, `!`, `~`, `.`, `( )`, `;`, `:`, `#`, `,`
In addition your password **MUST NOT**:

- Contain the first three characters of your name.
- Use the special characters *greater than sign or less than sign* e.g. `< >`

To change your password:

1. Enter your old password into the **Old Password** text box.
2. Enter your new password into the **New Password** text box. Be sure your new password meets the criteria outlined above.
3. Retype your new password into the **Confirm Password** text box.

Click the **Save** button at the bottom of the screen.

A confirmation message will appear to indicate that the subscriber has been registered successfully.

### 9.6 Editing Preferences

Using the **User Preferences** option you can configure some individual settings for your Shell LubeAnalyst account.

Access the **User Preferences** function from the Shell LubeAnalyst menu. Click the **User Details** heading and then select the **Preferences** subheading.
Settings that you can configure include:

- **Language** – set the language in which you wish to view Shell Lube Analyst. Select the appropriate language on the Language drop down menu.
- **Date Format** – select the date format you wish to use for dates in Shell Lube Analyst on the Date Format drop down menu.
- **Decimal Point** – select the decimal symbol you wish to use for numbers in Shell Lube Analyst on the Decimal Point drop down menu.
- **Time Zone** – select the time zone you are in on the Time Zone drop down menu.

Click the **Save** button at the bottom of the screen.

A confirmation message will appear to indicate that the user preferences have been updated successfully.
10 Site Management

A site represents a location of equipment / components within a company. Sites can be used to categorise equipment / components, samples and subscribers in Shell LubeAnalyst. Categorising these items under different sites makes searching and reviewing information easier.

10.1 Registering a New Site

Access the Register Site function from the Shell LubeAnalyst menu. Click the Site Management heading and then select the Register subheading.

You will now see the Register Site screen.

The Register Site screen is divided into three parts:

- **Customer Details** – your company name and address. This information is automatically completed by Shell LubeAnalyst and cannot be modified.
- **Site Details** – information regarding the new site such as site name and address.
- **Subscriber Details** – the user at the site who will be using Shell LubeAnalyst. Their duties will include maintaining equipment / components and registering samples in Shell LubeAnalyst.

### 10.1.1 Registering a New Site

To register a new site:

1. Enter a name for the site into the **Site Name** text box. This field is required.
2. Enter an address into the **Site Address** text boxes.
3. Ensure that the correct country is selected on the **Country** drop down menu.
4. Click the **Submit Form** button at the bottom of the screen.

A confirmation message will appear to indicate that the site has been registered successfully.

### 10.1.2 Subscriber Details

All subscribers must be assigned to a site. Subscribers will only be able to view the equipment / components and samples for the sites to which they have been assigned.

If a new subscriber for the site is necessary you can register the new subscriber when registering the new site. Click the **Register New Subscriber** button to register a new subscriber for the new site. *(Please see Registering a New Subscriber for more information on registering a new subscriber.)*

At all other times you can register a new subscriber using the **Register Subscriber** option which can be found under the **User Details** menu option. *(Please see Registering a New Subscriber for more information on registering a new subscriber using the Register Subscriber option.)*

### 10.2 Searching for Existing Sites

After you have created a site you will be able to locate the site in Shell LubeAnalyst using the search facility.
Access the **Search Site** function from the Shell LubeAnalyst menu. Click the **Site Management** heading and then select the **Search** subheading.

On the **Search Site** screen, enter the search criteria which can be used to locate site you wish to view and click the **Search** button.

<table>
<thead>
<tr>
<th>Customer ID</th>
<th>Customer Name</th>
<th>Site Name</th>
<th>Site ID</th>
<th>Site Address</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>841</td>
<td>Singapore Drilling</td>
<td>Drill Site 1</td>
<td></td>
<td>123 London Road, New Gateway 22222</td>
<td>Singapore</td>
</tr>
<tr>
<td>841</td>
<td>Singapore Drilling</td>
<td>Drill Site 2</td>
<td></td>
<td>Lot B, 123 London Road, New Gateway 22222</td>
<td>Singapore</td>
</tr>
<tr>
<td>841</td>
<td>Singapore Drilling</td>
<td>Drill Site 3</td>
<td></td>
<td>Lot C, 123 London Road, New Gateway 22222</td>
<td>Singapore</td>
</tr>
</tbody>
</table>

Shell LubeAnalyst will display those items that match your search criteria in a table at the bottom of the screen.

Click the link in the **Site Name** column to view the details of a selected site.

To view all sites, simply click the **Search** button without specifying any search criteria.

Your search may return more than one page of results. If so, page number links will appear at the bottom right hand corner of the **Search Results** table. These represent the number of pages returned by the search. To view a different page of the Search Results, simply click on the corresponding page number link. You can click the **>>** link to go to the last page of the Search Results.

**10.3 Viewing Existing Sites**

Site properties can be viewed on the **View Site** screen.

You will need to perform a search to find the site you wish to view. *_(Please see Searching for Existing Sites for more information.)_* When the search has completed, click the link in the **Site Name** column in the Search Results table to view the details of a selected site.

You will now see the **View Site** screen.
The screen displays the site properties including the Site ID, Site Name and Site Address.

At the bottom of the screen there are six buttons:

- **Modify Site** – click the Modify Site button to edit the properties of the site. *(Please see Modifying Existing Sites for more information.)*
- **Register New Site** – click the Register New Site button to register a new site. *(Please see Registering a New Site for more information.)*
- **Register New Subscriber** – click the Register New Subscriber button to register a new a subscriber for the selected site. *(Please see Registering a New Subscriber for more information.)*
- **Show Site Equipment** – click the Show Site Equipment button to search for all equipment which has been registered to the selected site. *(Please see Searching for Existing Equipment and Components for more information).*
- **Show Site Subscriber** – click the Show Site Subscriber button to search for all subscribers which have been assigned to the selected site. *(Please see Searching Existing Subscribers for more information.)*
- **Show Site Sample** – click the Show Site Sample button to search for all samples which have been submitted for equipment / components at the selected site. *(Please see Tracking a Sample for more information.)*
10.4 Modifying Existing Sites

You can modify the properties for selected a site on the **Modify Site** screen.

You will need to perform a search to locate the site you wish to modify. Click the **Search** subheading under the **Site Management** heading on the Shell Lube **Analyst** menu. *(Please Searching for Existing Sites for more information on performing a site search.)*

Find the site you wish to modify and click the link in the **Site Name** column in the search results table.

You will now see the **View Site** screen which displays the properties for the selected site.

Click the **Modify Site** button.

You will now see the **Modify Site** screen. This screen is identical to the form used to register new sites.
Edit the details of the site as required in the **Site Details** section of the screen.

Click the **Submit Form** button at the bottom of the screen to save the changes you have made to the site properties.

A confirmation message will appear to indicate that the site has been registered successfully.
11 Useful Information and Contact Us

11.1 Useful Information

Under the Useful Information menu heading you can find support materials which will help you to use Shell Lube Analyst.

Some of the options available under the Useful Information heading include:

- **Brochure** – the brochure for Shell Lube Analyst. The brochure provides an overview of Shell Lube Analyst and outlines the benefits gained from using Shell Lube Analyst.

- **User Guide** – the Shell Lube Analyst User Guide. This guide, in a PDF format, provides an overview of the Shell Lube Analyst service. This includes instructions on registering as a customer, registering equipment and components, selecting a test suite, correct lubricant sampling and invoicing for Lube Analyst samples. Download the guide to your PC. The PDF can be opened and viewed on your PC or printed to provide a hard copy for your records.

- **How To Sample** – instructions on correct lubricant sampling. This document details how to take a quality sample using the sample pump and provides instructions on sampling from circulation systems or from reservoirs, sumps and tanks. The document also outlines how to ensure health and safety conditions are met and how to avoid contamination of the sample.

- **Offline Registration Forms** – these are forms which can be filled in for offline registration. Forms available include:
  - Transport and Construction Vehicle Registration form – used to register equipment and components which can be classed under the Transport or Construction category.
  - Industry and Marine Equipment Registration form – used to register equipment and components which can be classed under the Industry or Marine category.
  - Customer Registration and Material Order form – used to register as a Shell Lube Analyst user or order materials and kits which can be used to collect samples.

  Each form is an Excel spreadsheet. Fill out the details in Excel and then email the file to the contact specified at the bottom of the form.

- **Test Descriptions** – a detailed description of tests that may be performed at the Laboratory. This list provides you with a detailed description of what each test involves. *If you are interested in viewing the list of tests associated with each Test Suite you can do so on the View Equipment / Component screen.*
  - Search for the equipment / component using the Search option under the Equipment / Vehicles heading.
  - Click a link in the Equipment Name or Component Name columns.
  - Click the Tests button next to the Test Suite text field located in the component details section of the screen.
  - A list of tests associated with that Test Suite will open in a new window.

- **Customer E-Training** – the Shell Lube Analyst Web User Guide. This guide, in a PDF format, provides detailed instructions on using all the functions of the Shell Lube Analyst web application. Download the guide to your PC. The PDF can be opened and viewed on your PC or printed to provide a hard copy for your records.

To save any of the above documents to your PC:

1. Access the Useful Information option by clicking on the Useful Information heading on the Shell Lube Analyst menu.
11.2 Contact Us

Use the Contact Us option to discover the contact details for your Administrative Focal Point, Technical Focal Point and Web Support.

- **Administrative Focal Point** – your point of contact for any queries you may have regarding your Shell LubeAnalyst account.
- **Technical Focal Point** – contact details for the Technical Helpdesk. They are your point of contact for any queries you may have regarding Samples and Sample Processing.
- **Web Support** – contact details for Web Support Helpdesk. They are your point of contact for any queries you may have regarding using the Shell LubeAnalyst web application.

To view the contact details for your area:

1. Access the Contact Us option by clicking on the Contact Us heading on the Shell LubeAnalyst menu.
Ensure that your country is selected on the Country drop down menu.

The Contact Name, Phone number and Email address of the Administrative Focal Point and the Phone number and Email address of the Technical Focal Point and Web Support contacts will appear in the main area of the Shell LubeAnalyst screen.
12 Customer E-Training

Customer E-Training – a version of the Shell LubeAnalyst Web User Guide which can be viewed online or downloaded and saved to your computer. This guide, in a PDF format, provides detailed instructions on using all the functions of the Shell LubeAnalyst web application.

To view the online version of the training, access the Customer E-Training option and click on the Launch Training subheading on the Shell LubeAnalyst menu. This starts the online version of the training.

Alternatively, access the Customer E-Training option and click on the Download Training subheading on the Shell LubeAnalyst menu. This allows you to download the guide to your PC, where you can save, view and print the document.