

# HOW TO TAKE AN OIL SAMPLE



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TO WORK.**

The S•O•S<sup>SM</sup> program is one element of a condition monitoring philosophy that you can put into place with your equipment to monitor the impact of your maintenance program. The S•O•S<sup>SM</sup> program combined with regular inspections, analysis of your equipment's site conditions, electronic data, and service history will enable you to evaluate your equipment's overall health. You can perform a maintenance program on your own, or you can enlist the assistance of Carter Machinery to perform any level of preventive maintenance that will keep your equipment running at peak performance.

## SAMPLING VALVE METHOD

This sampling method requires a brass probe plus approximately six inches of tubing or a sample gun equipped with a live sample port fitting. If you are sampling several compartments, begin with cleaner systems like hydraulics. Then sample the transmission or steering system. Sample engines and gear compartments last. Use a new piece of tubing for each sample – reusing the tubing will contaminate other samples. The steps below outline the process of sampling engine oil. Use the same process for other pressurized compartments.

### STEP 1

Before sampling, exercise the machine and implements to ensure the oil reaches operating temperature. This provides a sample that is representative of the oil in the compartment. Set the engine at low idle. Remove the dust cap from the valve and wipe the valve with a clean cloth.

### STEP 2

Insert the probe into the valve and collect about 100 ml (4 fl oz) of oil into a waste container. If the oil flow is slow at low idle, have someone accelerate the engine to high idle while extracting the sample. Dispose of the waste oil properly. This process cleans the valve.

### STEP 3

Insert the tube into the sample bottle, then reinsert the probe into the valve. Collect about 100 ml (4 fl oz) of oil, filling the sample bottle three-quarters full. Do not fill to the top. Do not allow any dirt to enter the bottle or bottle cap.

### STEP 4

Withdraw the probe from the valve and secure the bottle cap. Place the bottle with the completed label into the shipping cylinder. To avoid contamination, do not take samples from the drain stream, a waste oil container, or a used filter.



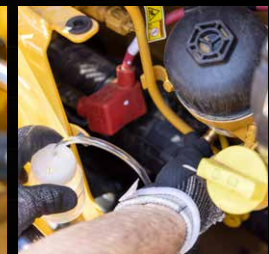
*Dust cap on valve*



*Wipe the valve clean*



*Tube inserted into the sample bottle*



*Insert probe into the valve*



*Secure the bottle cap*



*Place sample into the shipping cylinder*

### IMPORTANT NOTE: FILL OUT SAMPLE LABELS COMPLETELY!

To receive the most value from S•O•S<sup>SM</sup> Services, supply all of the requested information. Model, serial number, and service meter units on both equipment and fluid are very important. Obtain fluid and maintenance information from shop records, Product Link™, or Equipment Manager. Indicating fluid changes and top off fluid is also important. All of this information is critical to turn data into useful component health information and recommendations. Tip: fill out the sample label information before you begin taking samples to keep the label clean and easy to read.

# VACUUM EXTRACTION METHOD

This method uses a Vacuum Extraction Pump to sample non-pressurized systems. In general, use this method for geared compartments. It is important to use a new piece of tubing for each sample – reusing tubing will contaminate other samples. It is recommended that pressurized systems without sampling ports be fitted with sampling port kits, as this provides the most reliable sample. If a pressurized system does not have a sampling port, follow the vacuum extraction method described below. The steps below outline the process of sampling a final drive. Use the same process for other non-pressurized compartments.

## STEP 1

Before sampling, exercise the machine and implements to ensure the oil reaches operating temperature. This provides a sample that is representative of the oil in the compartment. Turn the engine off. Measure and cut new tubing to the length of the dipstick. If the compartment you are sampling does not have a dipstick, cut the tubing so that it reaches about half-way into the fluid depth.

## STEP 2

Insert the end of the tubing into the fluid sump. Do not allow the tubing to touch the bottom of the compartment.

## STEP 3

Insert other end of tubing through the head of the vacuum pump. Tighten the retaining nut. Tubing should extend about one inch beyond the base of the vacuum pump head. Install a new sampling bottle onto the vacuum pump.

## STEP 4

Pull the vacuum pump handle to create a vacuum. Hold the pump upright. If the pump is tilted or turned over, oil may contaminate the pump. If oil enters the pump, disassemble and clean it before taking the sample. Fill the sample bottle three-quarters full. Do not fill to the top. Do not allow any dirt to enter the bottle or bottle cap.

## STEP 5

Withdraw the tubing from the compartment. Remove the bottle from the vacuum pump and secure the cap on the bottle. Then place the bottle with the completed label into the shipping cylinder.

## BEST PRACTICE

To prevent contamination of the vacuum pump, loosen the nut and extend the tubing farther than one inch past the base of the vacuum pump head. Extend the tubing far enough that tubing with no oil on the outside is showing. Use the tubing cutter to cut the tubing. The cut should be made where the outside of the tubing is oil free below the base of the vacuum pump head. The remaining tubing may be pulled through the pump without leaving any oil on the inside of the pump. Pulling the tubing through the top of the vacuum pump, without completing this step, will leave oil residue that will contaminate future samples.



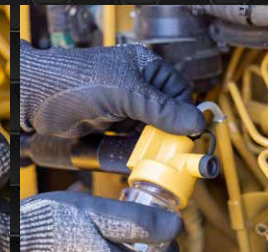
Measure tubing to length of dipstick



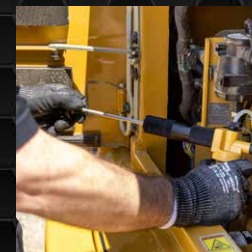
Insert tubing into the fluid sump



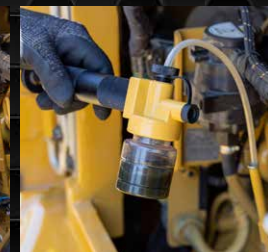
Insert tubing 1" into head of the vacuum pump



Install sample bottle onto vacuum pump



Pull the pump handle to create a vacuum



Fill sample bottle three-quarters full



Remove the bottle from the pump



Secure cap onto sample bottle



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