

Instructions

Sample Submission

These instructions will teach you about submitting the information about a fluid sample using the HORIZON software instead of the written form. You will learn how to:

- [Create work orders](#)
- [Collect sampling information using work orders](#)
- [Submit sample information](#)

Account Selection

The screenshot shows the HORIZON software interface. At the top, there is a navigation bar with 'My Dashboard | My Settings | Contact Us | Logout' and the HORIZON logo. Below this is a secondary navigation bar with tabs: 'Sample Reports', 'Management Reports', 'Equipment Manager', 'Sample Submission' (highlighted with a blue circle and '1'), and 'Technical Library'. The main content area is titled 'Sample Submission' and contains an 'Additional Actions' section (highlighted with a blue circle and '2') with icons for edit, reprint, delete, report, and instruction. Below this is a 'Sample Submission Selection Wizard' section with a 'Select By Account > Components' button (highlighted with a blue circle and '4'). A table below shows account information with columns for 'Select', 'Account Number', 'Account Name', 'City', 'State', and 'Country'. A search bar and sort arrows are highlighted with a blue circle and '3'. The table contains five rows of data for 'The Industrial Company 2' at various locations.

Select	Account Number	Account Name	City	State	Country
<input checked="" type="checkbox"/>	DEMO1500000000	The Industrial Company 2	BLOOMINGTON	MIN	US
<input type="checkbox"/>	DEMO1500010000	The Industrial Company 2			
<input type="checkbox"/>	DEMO1500030000	The Industrial Company 2	HOPKINSVILLE	KY	US
<input type="checkbox"/>	DEMO1500060000	The Industrial Company 2	WOODRIDGE	IL	US
<input type="checkbox"/>	DEMO1500060001	The Industrial Company 2	MT VERNON	IN	US

1 Select Sample Submission tab from the Dashboard

2 **Additional Actions** – These are shortcuts to a variety of tools related to sample submissions that have already been created. Mouse over the icons for their name to appear.

- **Edit Submissions** allows you to update the samples already logged.
Note: Not available after the sample is received at the lab.
- **Reprint Submissions** allows you to print the sample information from logged samples.
- **Delete Submissions** that were logged online incorrectly.
Note: Not available after the sample is received at the lab.
- **Sample Submission Report** shows all samples logged under a specific date range.
- **Sample Submission Instruction** will display a flow chart on how to log samples online

3 Use the open fields at the top to sort the information below.

- The arrows can be clicked to reverse the order of the list.
- Typing in a search field will sort the list below to help narrow your search. More than one field can be sorted at the same time.
- Numeric and date fields will accept “less than” (<), “greater than” (>), “equals” (=), and “contains” (*) operators
Examples: “> 4” or “< 2014-01-01”

4 Select one or more accounts and click the green arrow in the wizard.

Note: If no accounts are selected, the application continues as if all accounts were selected.

Creating Work Orders

Sample Submission Selection Wizard

Select By Account > Components →

Use * for wildcard searches in filters

Show 50 entries

Select	Account Name	Component ID	Secondary ID	Component Manufacturer	Component Model	Last Sample Date	Due Date
<input type="checkbox"/>	The Industrial Company 2	63-1 H	BOISE CASCADE	EATON	RS402	03-May-2014	01-Aug-2014
<input checked="" type="checkbox"/>	The Industrial Company 2	63-2 H	BOISE CASCADE	EATON	RS402	03-May-2014	01-Aug-2014
<input checked="" type="checkbox"/>	The Industrial Company 2	HAUL TRUCK 27 MAIN E	Hitachi EH4000 ACII	CUMMINS	GSK-60C		02-Jul-2014
<input type="checkbox"/>	The Industrial Company 2	MOVENTAS GB OF WIND TURB #127	AT FPL	MOVENTAS		26-Mar-2013	22-Sep-2013

5 Sort the fields and select the components you want to draw samples from.

6 Click the Print Work Order icon.

Note: If you have already pulled the sample and recorded the information on the component, you can skip ahead to Step 14 or follow the directions below to create a paper record of your submitted samples.

Collecting Sample Information

workOrder.pdf

file:///C:/Users/Andrea/Downloads/workOrder.pdf

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Place Tracking Sticker Here

Company Name: The Industrial Company 2
Account Number: DEMO16-0000-0000
Date Sampled: _____
Amount Fluid Added: _____

Equipment #: 63-1 H
Category: BOISE CASCADE
Component Type: HYDRAULIC
Fluid Changed: Yes / No / Filtered
Filter Changed: Yes / No

Notes to Analyst: _____
Miscellaneous: _____

Place Tracking Sticker Here

Company Name: The Industrial Company 2
Account Number: DEMO16-0000-0000
Date Sampled: _____
Amount Fluid Added: _____

Equipment #: 63-2 H
Category: BOISE CASCADE
Component Type: HYDRAULIC
Fluid Changed: Yes / No / Filtered
Filter Changed: Yes / No

Notes to Analyst: _____
Miscellaneous: _____

Place Tracking Sticker Here

Company Name: The Industrial Company 2
Account Number: DEMO16-0000-0000
Date Sampled: _____
Amount Fluid Added: _____

Equipment #: HAUL TRUCK 27 MAIN E
Category: Hitachi EH4000 ACII
Component Type: DIESEL ENGINE
Fluid Changed: Yes / No / Filtered
Filter Changed: Yes / No

Notes to Analyst: _____
Miscellaneous: _____

A PDF document will be created with the PDF includes the Company Name, Account Number, Component ID, Secondary ID, and Component Type for the components selected. Print the PDF and give it to the technicians pulling the samples.

Note: The process for opening the PDF will vary depending on the computer and browser being used. The browser in the image above automatically created a new tab and displayed the PDF in the browser.

- 7 Place the bar code sticker here to make it easier to record the tracking sample number.
- 8 Fill out the blanks with the date and information about the component and fluid.
- 9 Circle if the fluid and filter were changed when the sample was collected.
- 10 Include issues or maintenance actions for the Data Analyst to review.
- 11 Use the Miscellaneous area to add any additional information you want included in the report such as employee numbers, tech ID, etc.

Submitting Sample Information

My Dashboard | My Settings | Contact Us | Logout

Sample Reports Management Reports Equipment Management Sample Submission Technical Library

Sample Submission

Additional Actions

Sample Submission Selection Wizard

Select By Account Components **2**

Use * for wildcard searches in filters

Show 50 entries Search

Select	Account Name	Component ID	Secondary ID	Component Manufacturer	Component Model	Last Sample Date	Due Date
<input checked="" type="checkbox"/>	The Industrial Company 2	63-1 H	BOISE CASCADE	EATON	RS402	03-May-2014	01-Aug-2014
<input checked="" type="checkbox"/>	The Industrial Company 2	63-2 H	BOISE CASCADE	EATON	RS402	03-May-2014	01-Aug-2014
<input type="checkbox"/>	The Industrial Company 2	HAUL TRUCK 27 MAIN E	Hitachi EH4000 ACII	CUMMINS	QSK-60C		02-Jul-2014
<input type="checkbox"/>	The Industrial Company 2	MOVENTAS GB OF WIND TURB #127	AT FPL	MOVENTAS		26-Mar-2013	22-Sep-2013
<input type="checkbox"/>	The Industrial Company 2	PC TEST					02-Jul-2014

- 1 Select the components you drew samples from.
- 2 Click the green arrow to continue.

Sample Submission

Auto Fill Values: ▾

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Sample Information				
Account Name	Component ID	Tracking Number	Component Time	Filter Changed
The Industrial Company 2	63-1 H	<input type="text"/>	<input type="text"/> Choose One ▾	Choose One ▾
Account Number	Secondary ID	Sample Date	Fluid Time	Fluid Changed
DEMO160000000	BOISE CASCADE	<input type="text"/>	<input type="text"/> Choose One ▾	Choose One ▾
Component Type		Amount Fluid Added		
HYDRAULIC		0 <input type="text"/> Choose One ▾		
Kit: Choose One ▾		Rush <input type="checkbox"/>		Purchase Order: <input type="text"/>
Notes To Analyst			Miscellaneous	

The logging screen creates a section for each component selected. The fields make it easy to fill out the information gathered using printed work orders. The Sample Information (Account Name, Account Number, Component ID, Secondary ID, and Component Type) will display information about the component.

3 To enter information common to all of the components, click on the arrow next to “Auto Fill Values”.

Auto Fill Values: ▲							
Sample Date	Component Time	Fluid Time	Calculate Fluid Time	Fluid Changed	Filter Changed	Purchase Order	Rush
07/02/2014	<input type="text"/>	<input type="text"/>	<input type="text"/>	Choose One ▾	Yes ▾	<input type="text"/>	<input checked="" type="checkbox"/>
↓							
Sample Information							
Account Name	Component ID	Tracking Number	Component Time	Filter Changed			
The Industrial Company 2	63-1 H	<input type="text"/>	<input type="text"/> Choose One ▾	Yes ▾			

4 Fill out the information and click the green arrow to apply it to all of the components below.

Note: The fluid time calculator will only work if both the lubricant and unit time were provided with the previous sample.

5 Fill out the remaining information for each component.

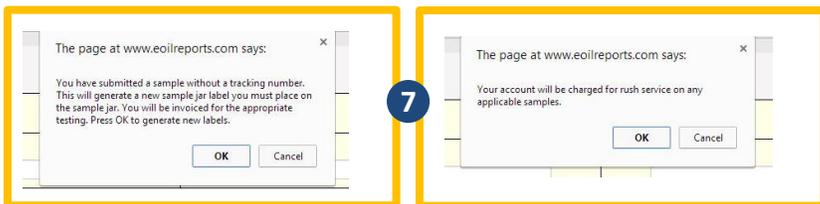
- Tracking Number – Enter the tracking number from the bar code label affixed to the sample and Work Order. A new tracking number will be generated if this field is left blank.
Note: See the “Printing Labels” section for more information. Your account will be invoiced for the appropriate testing if a new number is generated.
- Filled out the sample date, the amount of fluid added, the component time, and fluid time. Don’t forget to select the label for certain fields. Select if you changed the filter or fluid in the component.
- Use the calculator icon to automatically fill out how many hours have been logged on the fluid. The Component Time is required for this button to operate.
- Choose the type of testing to be run on the sample. The price varies depending on the tests included in the kit.

- Click the “Rush” box to have the lab prioritize the sample and have it analyzed as quickly as possible. An additional fee will apply.
- Add optional purchase orders, notes to the laboratory and analysts, and miscellaneous information (such as employee numbers, tech ID, etc.).

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6 Click the green arrow to proceed or the red box to cancel.



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7 A pop-up window will appear with if a tracking number field was left blank or if a rush order was selected.

Sample Submission > Print Labels or View Report

Print Labels or View Report

Submission Successful

View Management Report

The Sample Submission Report summarizes information for each online sample submission. It includes all samples submitted until they are scanned upon receipt by the laboratory. Comparing samples prepared for transit to this report before shipping ensures sample information submitted online matches what is attached to the sample jar.

Generate Labels

Select your label printing settings below and press the button to print your labels.

Select Label Type: Avery 5963 (8 1/2" x 11")

Start Position: 1

Sample Submission Instructions

Step 1
Take Sample

1. Take Sample
2. Place Tracking Number on Sample Jar
3. Denote Component ID

Step 2
Enter Information in HORIZON®

Select Account
↓
Select Component
↓
Fill in Sample Information

Do you have an existing tracking number?

No: Leave tracking number blank and enter additional information
↓
Print labels and place on correct sample jar.

Yes: Enter scan tracking number and enter other information
↓
Do not need to print. Ensure tracking number is on jar.

Step 3
Ensure Tracking Number is on Sample Jar

Step 4
Ship Sample to Lab

May edit sample information or delete labels until samples are received by lab.

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8 You will be taken to a screen where you can view the management report for online sample submissions or print the Tracking Numbers generated onto labels.

For additional questions about the HORIZON application, please contact us at custserv@eoilreports.com.