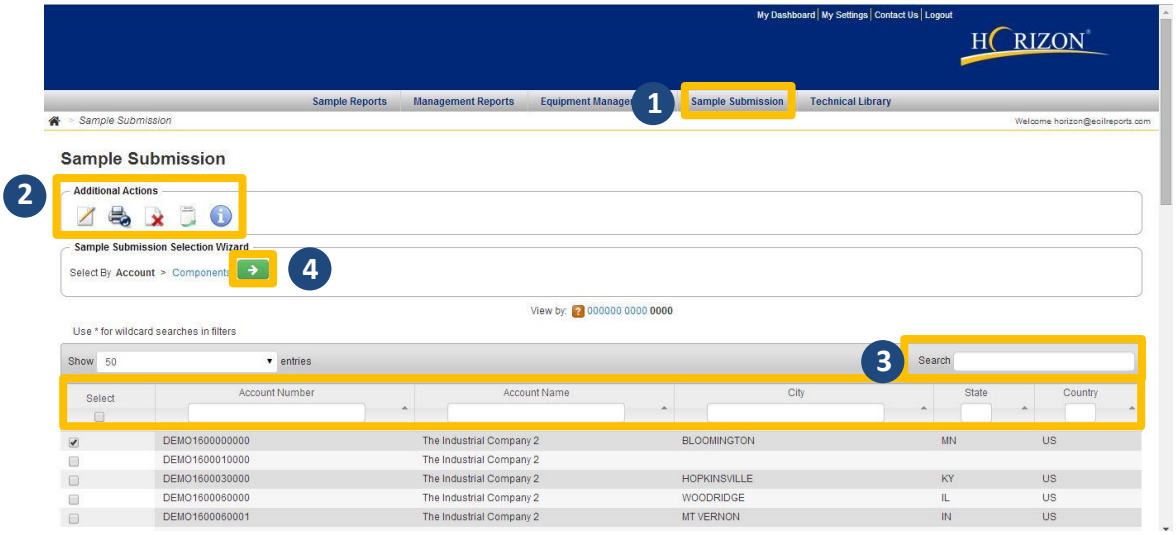
Instructions

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



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 Submission**s 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

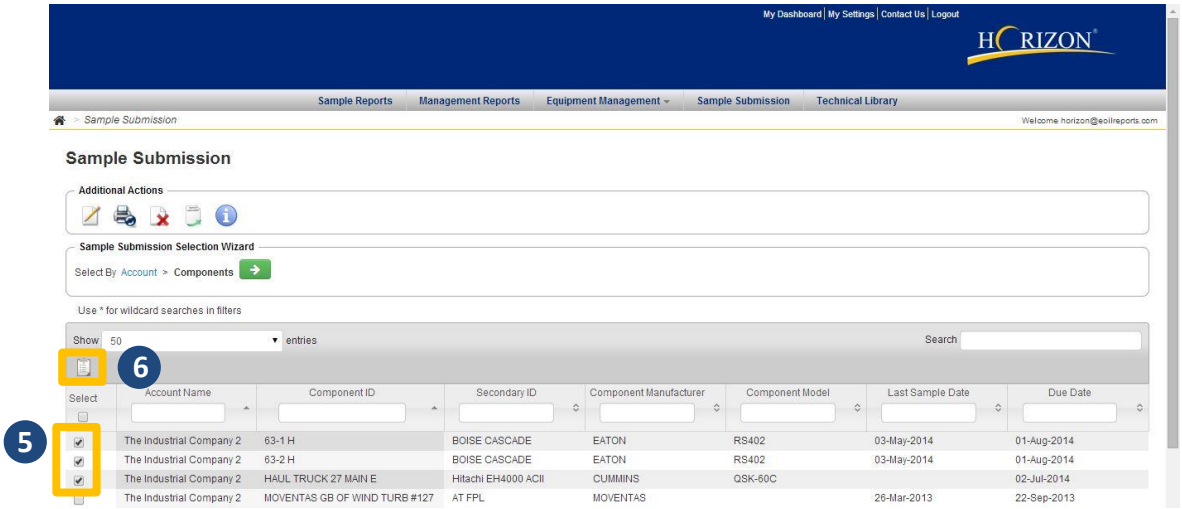
3 Use the open fields at the top to sort the information below.

- 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

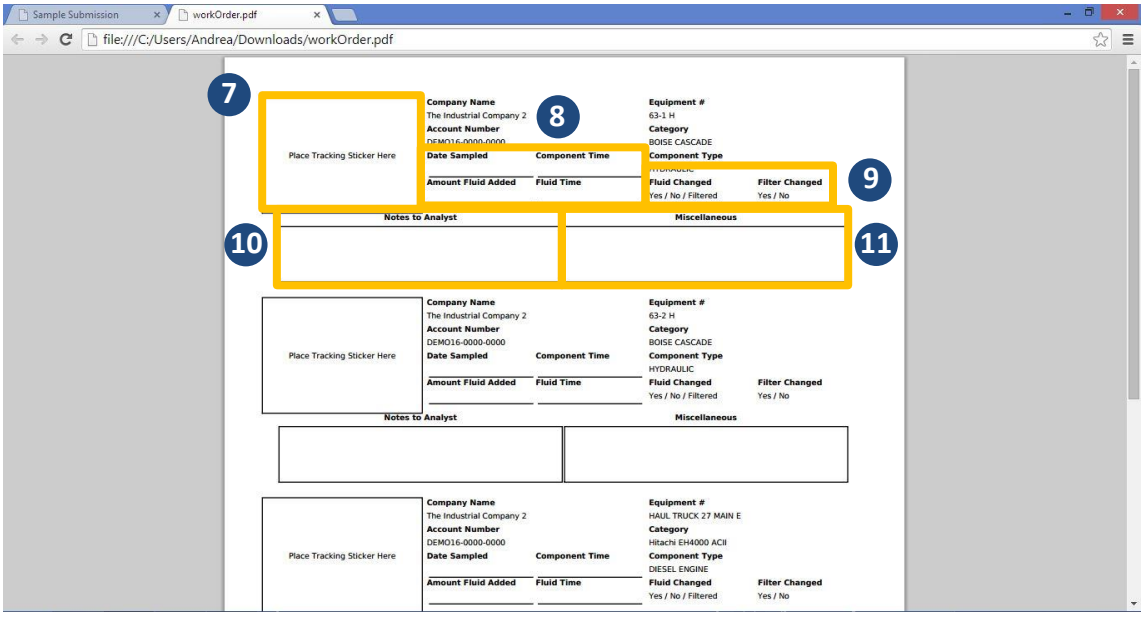


5 Sort the fields and select the components you want to draw samples from.

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.

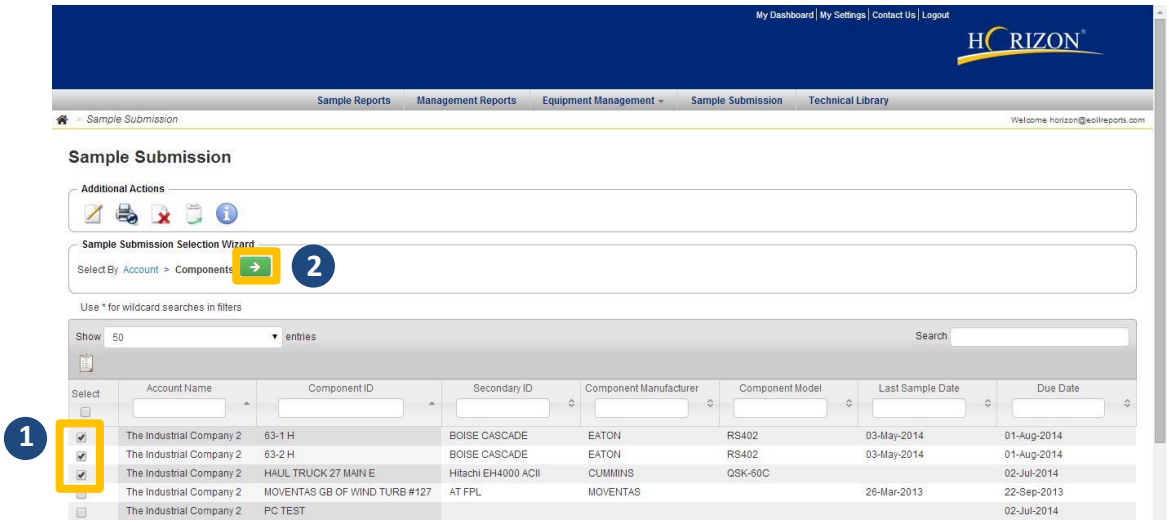
Collecting Sample Information



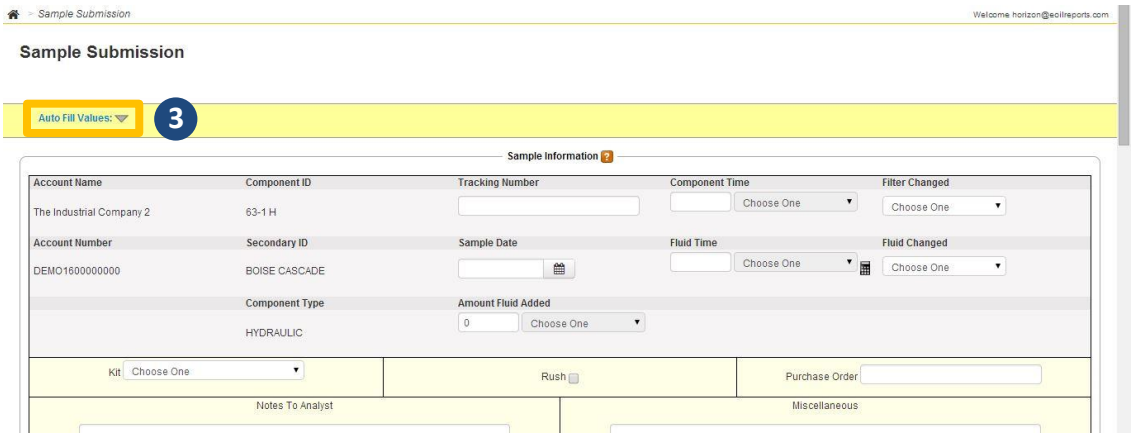
A PDF document will be created with the PDF includes the Company Name, Account Number, Component ID, Secondary ID, and Component Type for the components selected. Print the PDF and give it to the technicians pulling the samples.
Note: The process for opening the PDF will vary depending on the computer 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

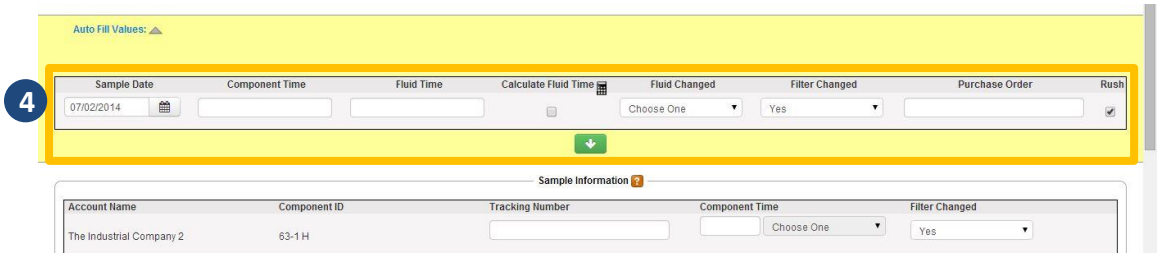


1. Select the components you drew samples from.
2. Click the green arrow to continue.



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".



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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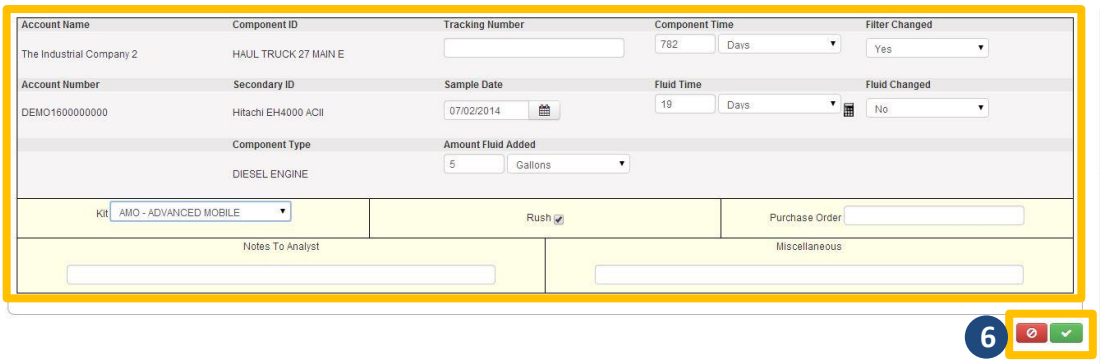
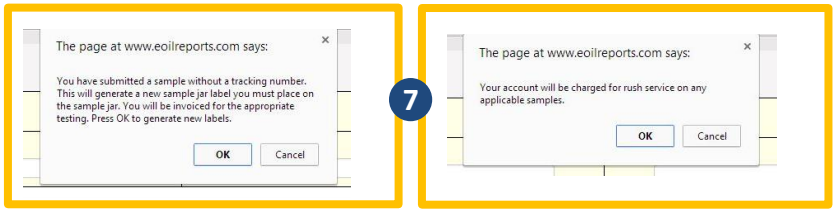
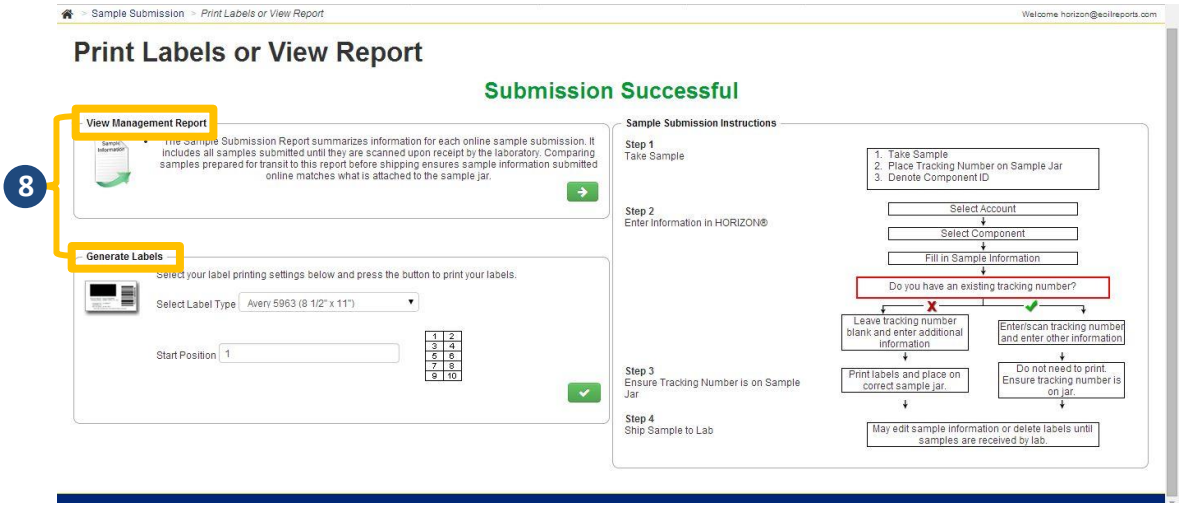


6 Click the green arrow to proceed or the red box to cancel.



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



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.