

# Fluid Care Portal

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Customer user manual

EN

User manual

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Original operating instructions

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This exclusion of liability does not apply in cases of intent or gross negligence. Moreover, it does not apply to defects which have been deceitfully concealed or whose absence has been guaranteed, nor in cases of culpable harm to life, physical injury and damage to health. If we negligently breach any material contractual obligation, our liability shall be limited to foreseeable damage. Claims due to the Product Liability shall remain unaffected.

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# 1. Initial Logging In

To start your journey with the Fluid Care Portal, we require some basic information from you. Please send us an email at [big@hydac.com](mailto:big@hydac.com) with the following:

- Your Work Email Address
- Your Company Name

You will receive an automated email with a link to set up your account. If you do not receive an email, please be sure to check your Junk/Spam folder in case it has ended up there or contact your HYDAC support.

You can now set up your account and head to [fluidcare.hydac.com](https://fluidcare.hydac.com).

The screenshot shows the registration page for the HYDAC Fluid Care Portal. At the top, it says "Welcome to the HYDAC Fluid Care Portal!" and asks the user to fill in fields to set up their account. The form includes:

- Full Name:** A text input field with a person icon and the placeholder "Enter your full name".
- Phone Number:** A text input field with a phone icon, a dropdown menu for country codes (currently showing "+1"), and a placeholder.
- Create password:** Two text input fields for "Password" and "Password Confirmation", each with a strength indicator icon. To the left, requirements are listed: "Minimum 8 characters", "Uppercase and lowercase (A-z)", "Numeric character", and "Special character (!, %, @, #, etc.)".
- Privacy Policy:** A checkbox with the text "I have read and agreed to HYDAC Fluid Care Portal's Privacy Policy." Below it, a red note states: "\*You must accept our privacy policy to create an account and use our services."
- Stay informed with the latest software features:** A checkbox with the text "Receive updates on new features, services, and relevant news tailored to enhance your experience. You can customise your preferences or opt out at any time via your account settings."
- Sign up:** A blue button.

At the bottom of the page, there are links for "Cookie Settings", "Privacy policy", and "Imprint".

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## 2. Home Page

Upon logging in to the Fluid Care Portal, you will be greeted with a home page.

Features present on the home page are:

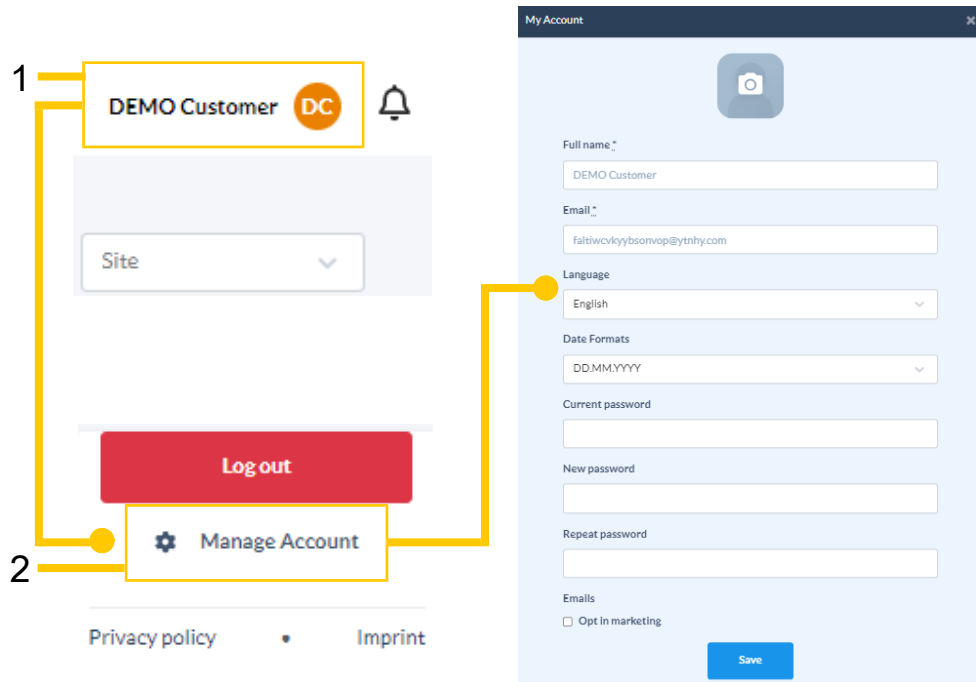
- Interactive graph presenting an overview of the sample over the last 6 months where you can click on each bar to be redirected to the chosen samples for the given months.
- Overview of total assets and their health.
- Overview of total samples and their condition.
- Table with sampling due.



1	User Name	2	Overview
3	Role	4	Users
5	Fluid database	6	Laboratory
7	Task	8	Assets
9	Home		

## 3. Manage Account

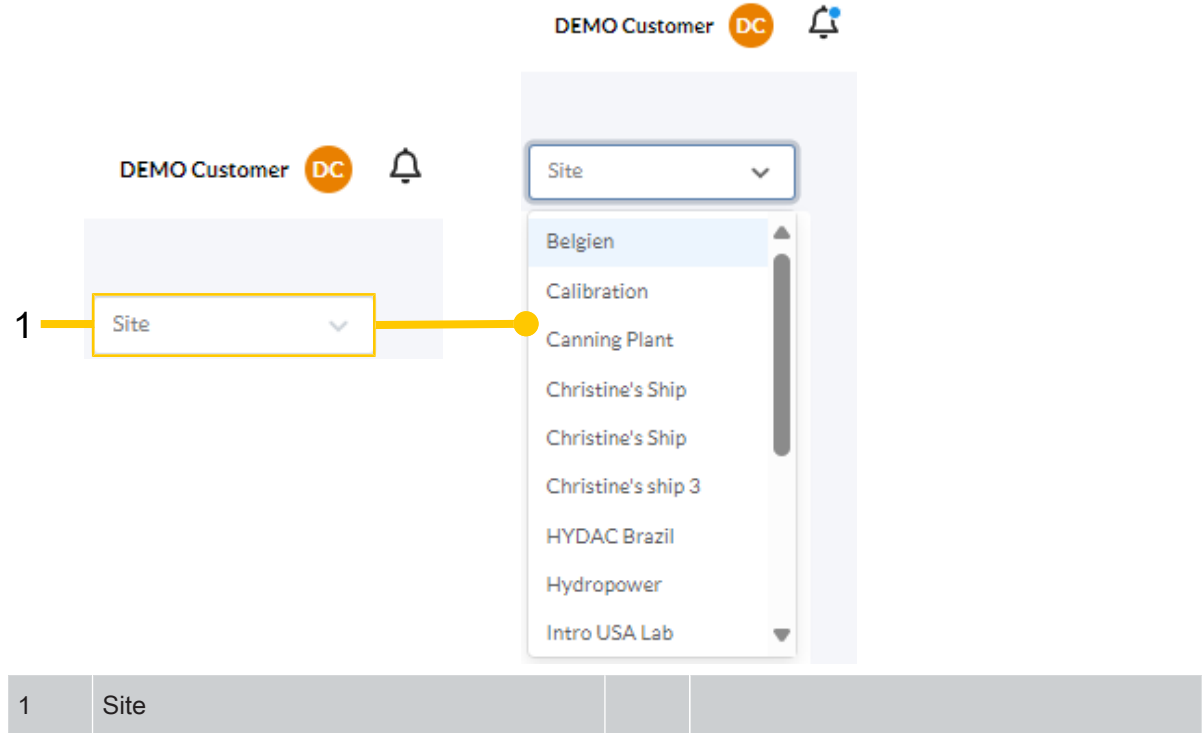
- To Manage account, click on your name, in this case Demo User.  
⇒ This brings a drop-down where you can see Manage Account.
- Within this section you can upload a photograph of yourself, change your password and choose your marketing preferences.



1	User	2	Manage account
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## 4. Selecting a Site

Users with access to multiple sites can select them from a drop-down tab under their user details. This allows them to limit the sites they can see in the software, making it easier to manage and track specific assets. This feature also helps to prevent confusion and mistakes by ensuring that users only see the information that is relevant to the sites they are responsible for.



## 5. Site Structure – Overview

After clicking on the factory icon, the area for asset management section opens. This area of the Fluid Care Portal is designed for you to build the structure of sites and assets for laboratory results to be uploaded onto when the time comes.

The hierarchy of the structure is as follows:

- **Assets > Site > Asset**

Example:

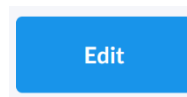
- **Demo > Power Plant > Unit 1 > Hydraulic System**

## 6. Site Structure - Create Site

### Company Admin only

Creating a site requires you to fill in the site name. It is optional to select a contact person or provide an address. A drop-down list of users is available to select a contact person. This gives a list of users signed up for this customer - selecting them here has no bearing on their user rights but is stored to quickly establish the contact point.

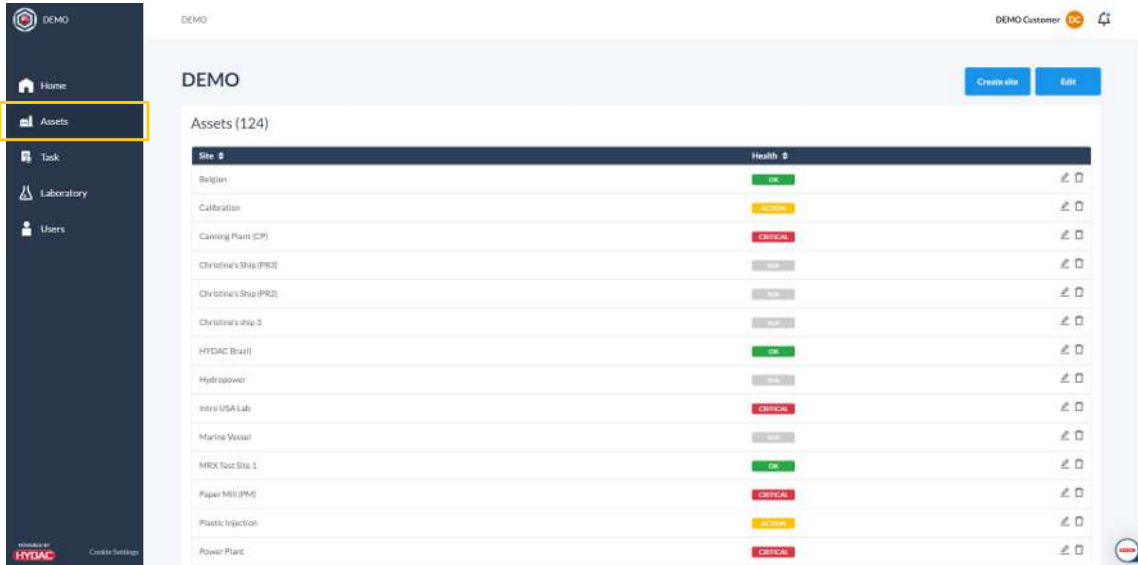
Here, the "Edit" button opens the ability to edit the overall customer details.



## 7. Asset Structure – Overview

Selecting a site will display the assets associated with that selected site. The assets will then contain further assets in that family.

The list of assets provides an overview of the health status of the system, as well as the sample reference for each asset. This information is essential for properly identifying and directing samples to the laboratory for analysis.



DEMO

DEMO Customer

DEMO

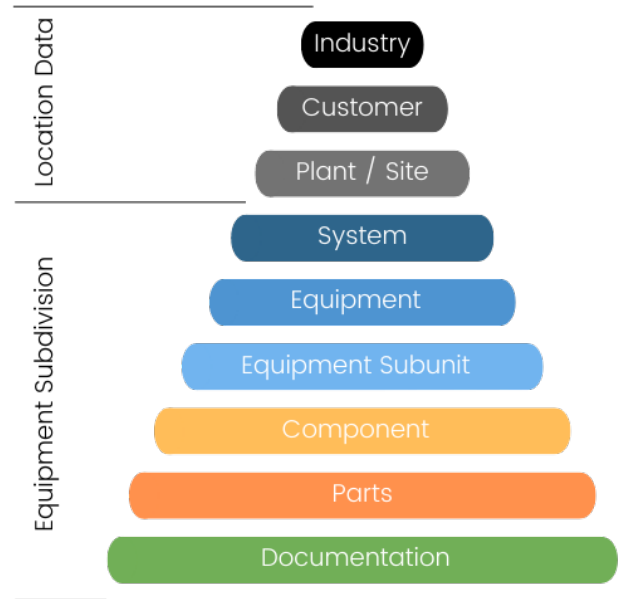
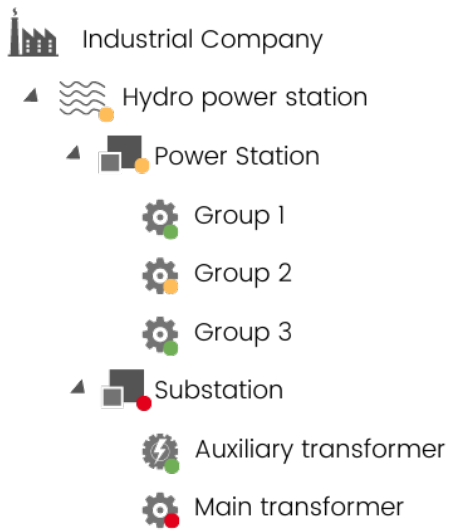
Create site Edit

Assets (124)

Site	Health	
Belgien	OK	
Calibration	ACTION	
Canning Plant (CP)	CRITICAL	
Christmas's Ship (PR2)	UNKNOWN	
Christmas's Ship (PR2)	UNKNOWN	
Christmas's ship 3	UNKNOWN	
HYDAC Brazil	OK	
Hydropower	UNKNOWN	
Intra USA Lab	CRITICAL	
Marine Vessel	UNKNOWN	
MRX Test Site 1	OK	
Paper Mill (PM)	CRITICAL	
Plastic Injection	ACTION	
Powder Plant	CRITICAL	

HYDAC

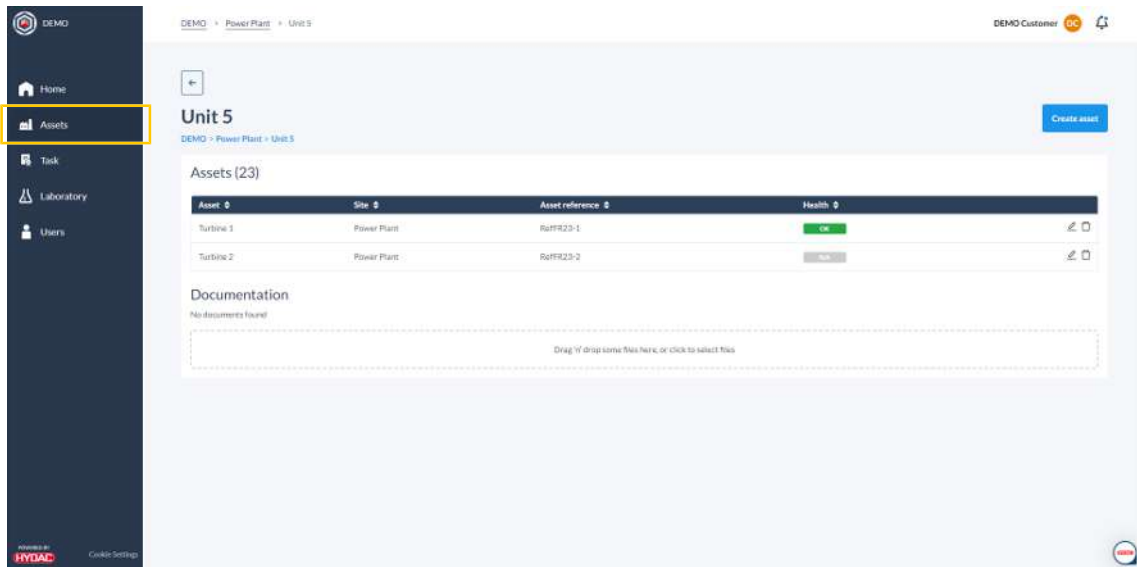
# 8. Asset Structure



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## 9. Single Asset Overview

Drilling down to the final asset in the hierarchy will give an overview of all samples that have been collected and tested from this specific asset, along with a visual representation of how the condition of the asset has changed over time.



The screenshot displays the 'Single Asset Overview' for 'Unit 5'. The interface includes a sidebar with navigation options: Home, Assets (highlighted), Task, Laboratory, and Users. The main content area shows the following details:

- Unit 5** (DEMO > Power Plant > Unit 5)
- Assets (23)** table:

Asset	Site	Asset reference	Health	
Turbine 1	Power Plant	RpFFR23-1	OK	 
Turbine 2	Power Plant	RpFFR23-2	OK	 

- Documentation**: No documents found. A dashed box indicates where to drag or click to select files.

The interface also features a 'Create asset' button in the top right corner and a 'Cookie Settings' link in the bottom left corner.

# 10. Single Asset Overview – Documentation

The Documentation section is a good place to share relevant information - such as system schematics, standards or maintenance schedules. This will help when solving problems associated with the systems identified in the reports.

Documentation

Documentation	Extension	File size	Uploaded by	Date
<a href="#">Documentation_test_demo.pdf</a>	pdf	7.22 MB	DEMO-HYDAC user	2024-10-11T08:30:25.716Z

Drag 'n' drop some files here, or click to select files

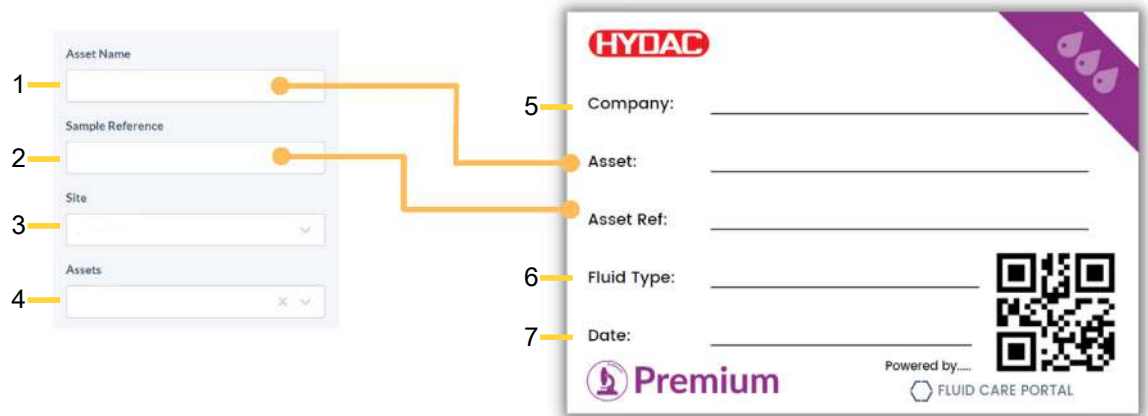
EN

# 11. Labelling the samples

1. Labelling a fluid sample correctly when sending it to a laboratory is important because it ensures that the sample can be identified and tracked throughout the testing process. It also helps the laboratory to understand the context of the sample, such as where it was collected from and what it is being used for, which can affect the test results.

A properly labelled fluid sample will also help to ensure that the sample is handled and stored correctly and that the results are accurate and can be used to make informed decisions.

2. It is important that the asset information in the Fluid Care Portal matches the information on the label to ensure that the results are published to the correct asset. This can help prevent errors and ensure accurate tracking of the asset's maintenance and performance.



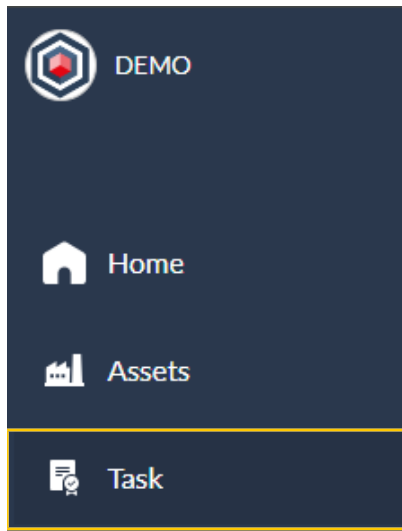
1	Asset name	2	Sample reference
3	Site	4	Assets
5	Company	6	Fluid type
7	Date		

## 12. Task Module – Overview

The Task Management module exists to encourage users to take action on the recommendations identified in the fluid Analysis.

With the new Task Management module users can:

- Close multiple open recommended actions at once
- Combine multiple recommended actions into a task
- Assign users to a task
- Write a description to a task
- Add attachments to a task
- Write comments and questions to a task



# 13. Recommended actions tabs

- New Actions: New actions that are not yet taken care of
- Tasks: Open tasks that are assigned or in progress including completed tasks
- All Actions: The previous Recommended Action List containing all recommended actions including their status. Here you will find a status called "Outdated" which is an old action that has a newer sample

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### Recommended Actions

New Actions (5)    Tasks    All Actions

Showing 25

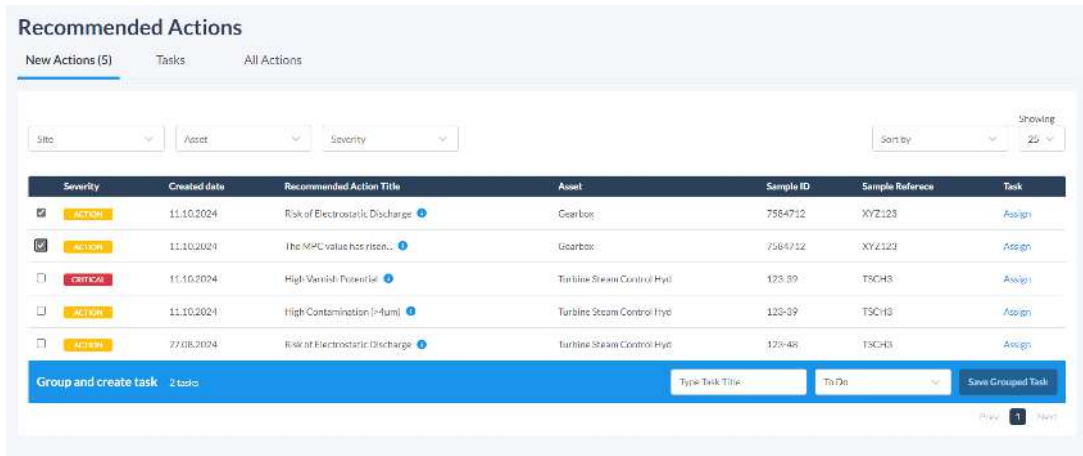
Severity	Created date	Description	Sample ID	Sample Reference	Task
<input type="checkbox"/> ACTION	11.10.2024	Risk of Electrostatic Discharge	7584712	XY2123	<a href="#">Assign</a>
<input type="checkbox"/> ACTION	11.10.2024	The MPC value has risen...	7584712	XY2123	<a href="#">Assign</a>
<input type="checkbox"/> CRITICAL	11.10.2024	High Varnish Potential	123-39	T3CH3	<a href="#">Assign</a>
<input type="checkbox"/> ACTION	11.10.2024	High Contamination (>4µm)	123-39	T3CH3	<a href="#">Assign</a>
<input type="checkbox"/> ACTION	27.08.2024	Risk of electrostatic Discharge	123-48	T3CH3	<a href="#">Assign</a>

Prev 1 Next

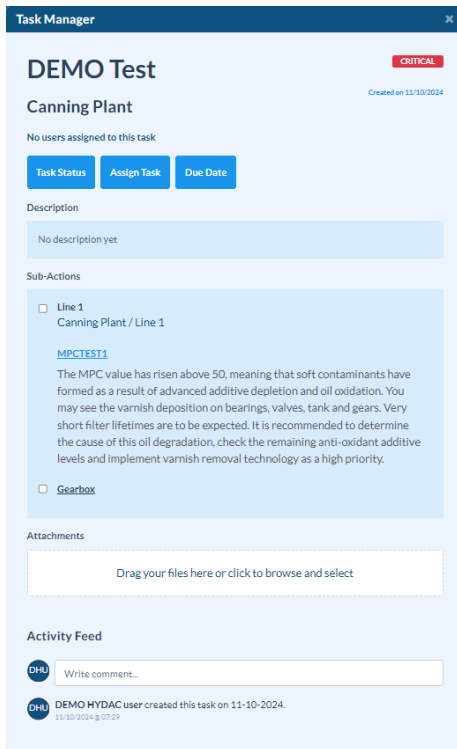
The conductivity is significantly lower than 500 µS/m, as a result, problems with electrostatic discharge are more likely to occur. This can cause increased oil degradation and varnish build up, possibly leading to reduced filter lifetimes and varnish deposition on key components. Filter elements resistant to the build-up of electrostatic charge are recommended. This is due to the fluid chemistry and applies to all systems using this fluid type.

# 14. Task Module - Create tasks group

1. Select the actions.
2. Here you can choose the actions that you would like to be grouped into one task.
3. Confirm the task.
4. Once all the items are selected you wish to group, give the task a name and click on the Save Grouped Task tab.



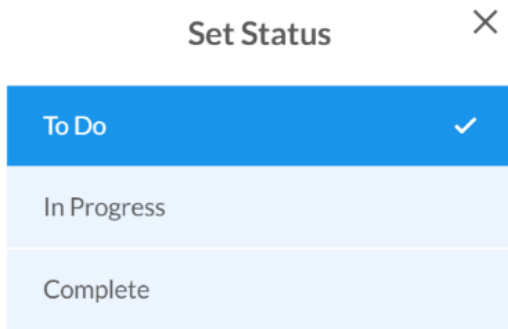
⇒ Once you save the grouped task the Task Manager tab appears.



## Task Status

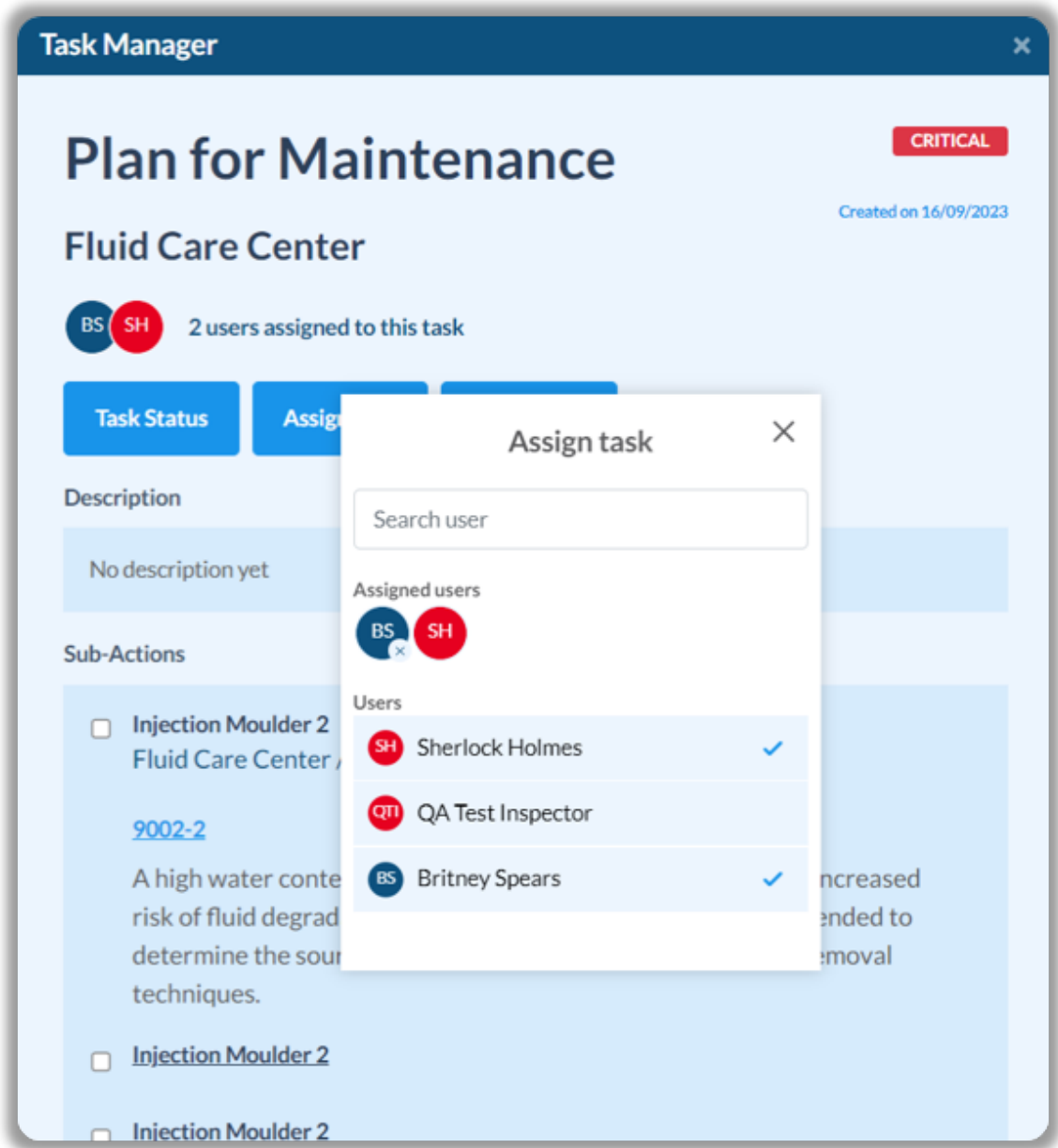
5. Select the status of the task.

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**Assign Task**

- 6. You can assign the responsibility of the task to other users in the company as long as they have a user login.



**Due Date**

- 7. Set reminders and the date the task is due by and this will be tracked on the card.



# 15. Task Module - Task details

## Description

Add the information on the task such as the instructions.

Please ensure we take a deeper look on this Asset during maintenance next week.

**Save** **Cancel**

## Add Files

Adding files to support the task this could be a user manuals or photos.

## Activity Feed

The feed keeps track of changes and comments for the card.

### Attachments

Drag your files here or click to browse and select

### Activity Feed

- SH
- SH

These actions have already been completed.

16/09/2023 @ 09:52 pm
- SH

**Sherlock Holmes** has changed **Description** to **Please ensure we take a deeper look on this Asset during maintenance next week.**

16/09/2023 @ 09:51 pm
- SH

**Britney Spears** was assigned by **Sherlock Holmes**

16/09/2023 @ 09:49 pm
- SH

**Britney Spears** was assigned by **Sherlock Holmes**

16/09/2023 @ 09:49 pm
- SH

**Sherlock Holmes** assigned them self to this task.

16/09/2023 @ 09:49 pm
- SH

**Sherlock Holmes** created this task on 16-09-2023.

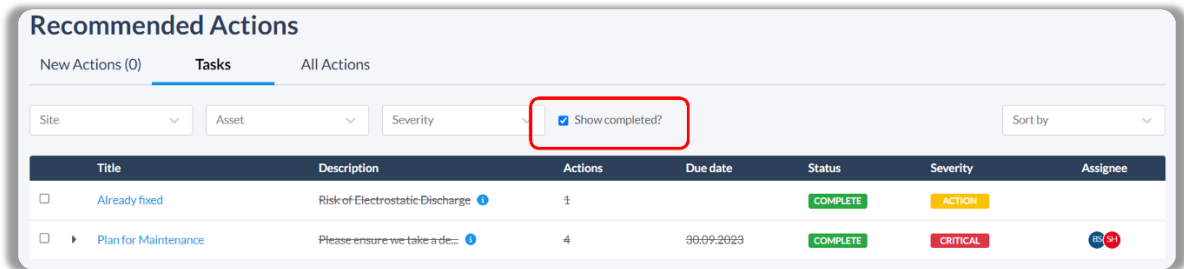
16/09/2023 @ 09:49 pm

# 16. Task Module - Tasks assigned

## Tasks

The task now appears under the Task tab where you can locate all created tasks. Once the task is completed the task will disappear.

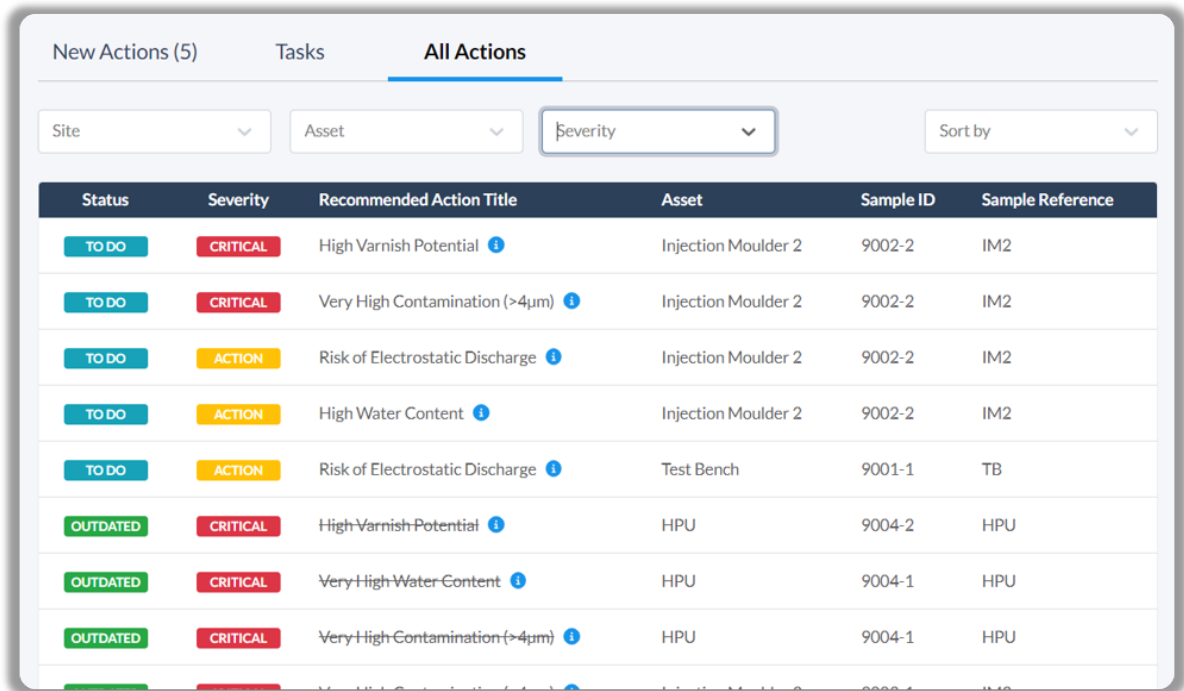
- ▶ To see the completed tasks, you can also select the tick box 'Show completed?' and the completed tasks will be visible.



## Task Module - Actions Overview

The "All Actions" tab brings up a comprehensive list of actions generated from laboratory results for all assets and sites. The list can be narrowed down using the "Select Site" and "Select Asset" drop-down menus located in the top right corner of the page. The actions are organized by severity, with "Critical" actions at the top to indicate the recommended priority.

By clicking on an action, the "Action Info" pop-up will appear, displaying the sample number. The sample number can be clicked on to navigate to the corresponding sample report, and a microscope photograph will be shown if available.



The "Status" section allows the customer to manage their actions. Changing this to "Complete" will drop the action to the bottom of the list and strike-through the text; this will also return the health of the asset to "OK".

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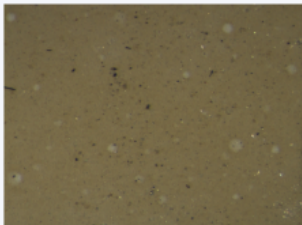
### Action Info ×

**Sample No**  
MBFP1 - 1

**Date**  
08/07/2020

**Description**  
Very high level of contamination has been identified. It is recommended to determine the source of contamination ingress and apply improved filtration.

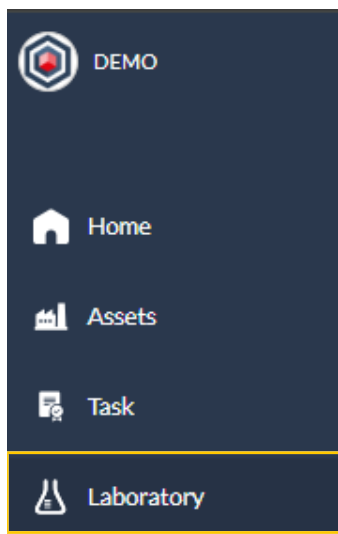
**Oil Patch**



**Status**  
ToDo ▼

[Save changes](#)

## 17. Laboratory



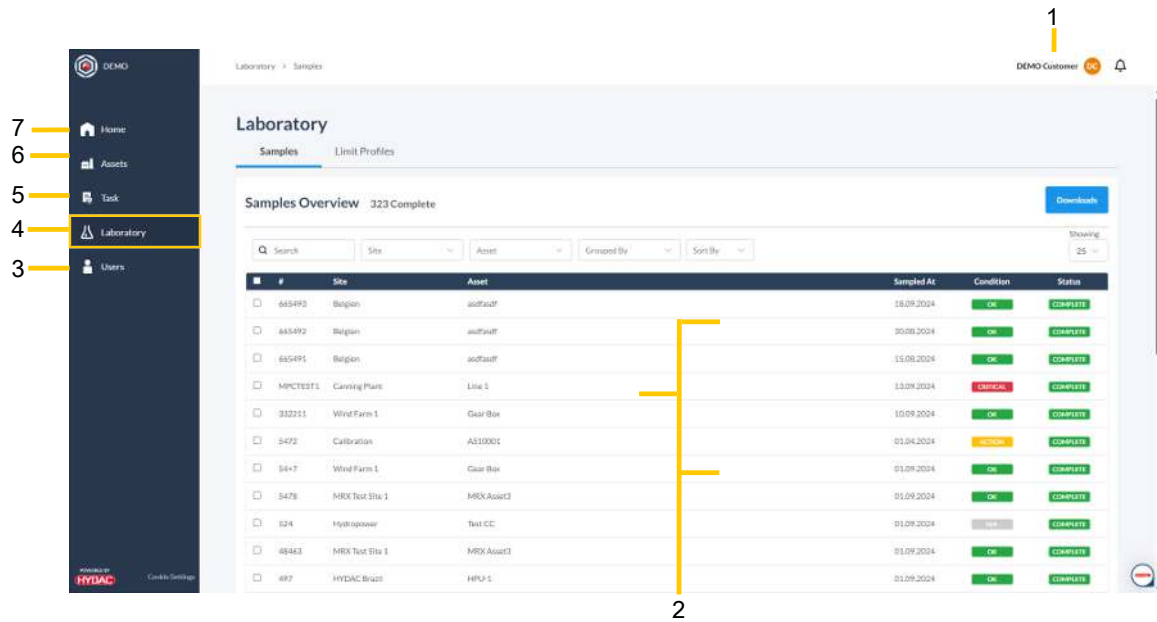
EN

# 18. Samples Overview

Clicking on the laboratory flask icon will open the "Laboratory" area of the fluid care portal. Immediately, you can see a sample overview for the customer you are viewing. This is a list of every single sample that has been analysed for the customer, clicking on any one of them will open the individual sample report.

There is also the option to search, filter or sort the results to make it easier to navigate to the specific sample you are trying to view. By default, the most recently uploaded samples will be at the top.

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1	User Name	2	Sample information
3	Users	4	Laboratory
5	Task	6	Assets
7	Home		

# 19. Sample Report

The report generated by the software will contain the results from the agreed testing, along with associated imagery and recommended actions. These actions are based on the limit profile that has been set for the asset.

The color-coding of the results is also based on the limit profile, with different colours indicating whether the results fall within acceptable limits, or if further action is required. These features help users quickly identify any issues and take the necessary actions to keep their assets in good working order.

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Sample Overview
Trending

### Sample Analysis

Water Content	113.7	ppm
Conductivity	86	µS/cm
Gravimetric result	73	mg/L
<b>TAN</b>		
	0.66	mg/Dmg
<b>Particle Count (ISO4406)</b>		
	ISO Code	21/18/14
<b>Microscopic Contamination Analysis</b>		
Black Contamination		HIGH
Silicate Residue		RAISED
Quartz		LOW
<b>Viscosity</b>		
Viscosity at 40°C	46.8	mPa·s
Viscosity at 100°C	7.1	mPa·s
<b>MPC</b>		

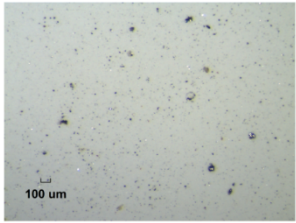
Patch Test - Types of particles

BLACK CONTAMINATION
SILICATE RESIDUE
QUARTZ

Levels ● High ● Raised ● Low

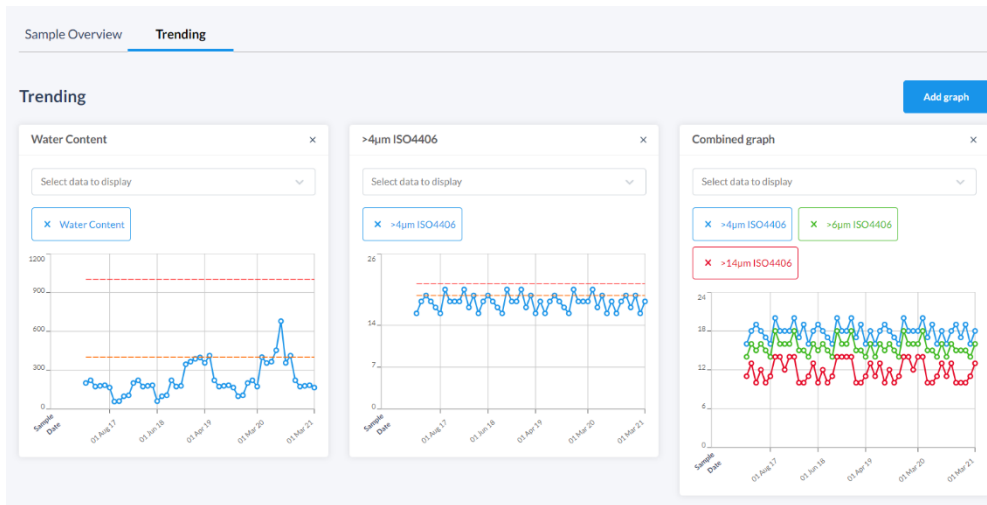
Fluid Volume Used for Patch Test 100 ml

Oil Patch



## 20. Samples report – Trending

The trending feature offers a summary of the changes in results over time. Keeping an eye on trending is crucial for identifying potential issues with system performance and taking steps to prevent major malfunctions before they occur.



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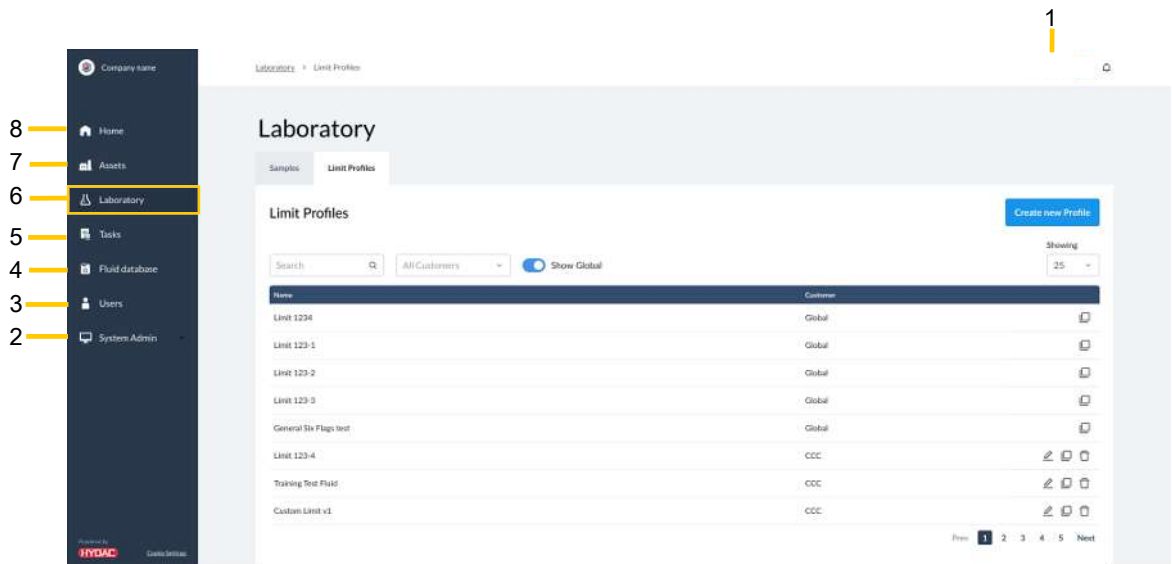
## 21. Limit Profiles – Overview

Limit Profiles define the set of limits applied to laboratory analysis results to assess system health and generate recommended actions. For instance, specifying an ISO 4406:1999 cleanliness limit of 18/16/13 will flag results above this value as an "Action" condition, triggering specific remarks or recommendations.

The Limit Profile page displays all the limit profiles you have created and that your assets are using.

Clicking on a limit profile opens the list of limits, showing the values that trigger "Action" and "Critical" conditions.

There are also Global Limit Profiles, which serve as generic templates for Limit Profiles. When selected, a Global Limit Profile is cloned into the account's profiles.



1	User Name	2	Role
3	Users	4	Fluid database
5	Tasks	6	Laboratory
7	Assets	8	Home

EN

### Create Limit Profile

**General information**

Name:  Customer:

Set as default

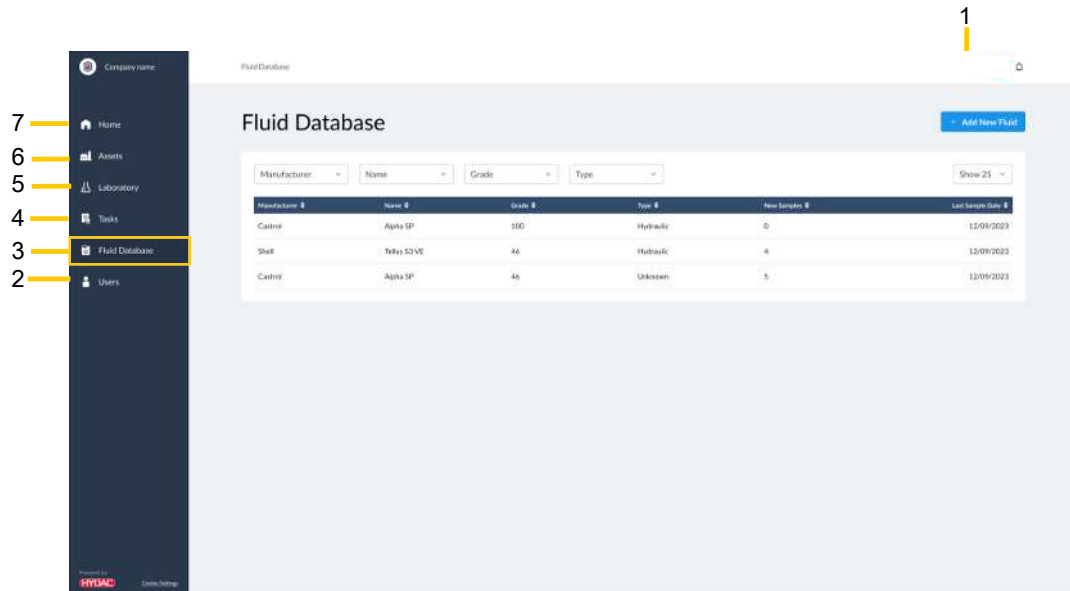
**Limits** Copy data from Existing Profiles

Limit	Action	Critical
<input type="text" value="Select..."/>	<input type="text" value="Condition..."/> 0	<input type="text" value="Condition..."/> 0 <input checked="" type="checkbox"/> <input type="checkbox"/>

## 22. Fluid Database

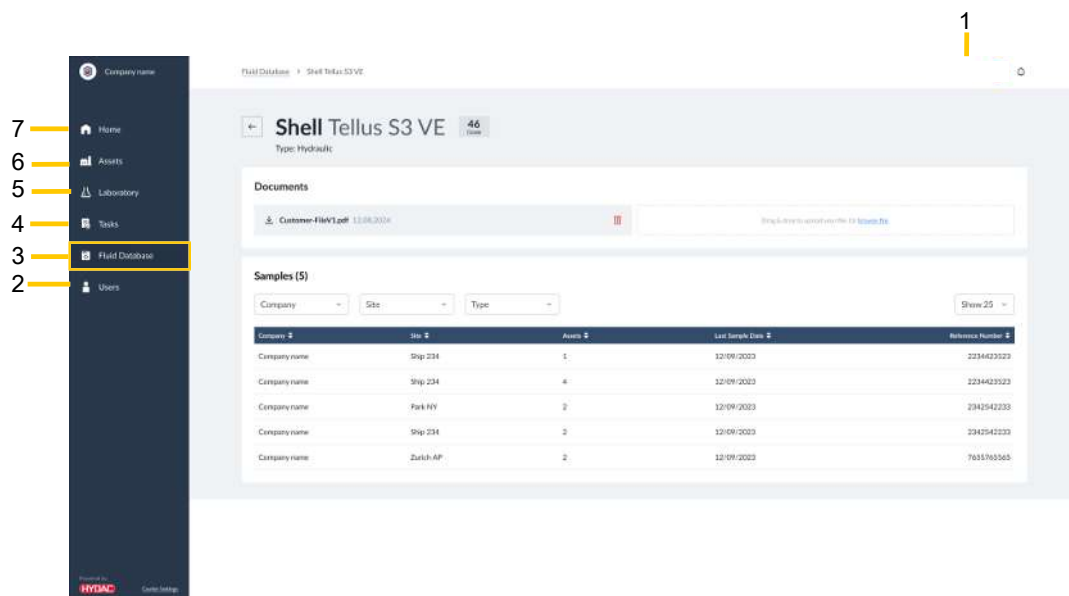
The fluid database is your library of fluids where you can see the fluids you have reported your assets using. In this menu you can:

- Add fluids.
- Store new fluid samples.
- See how many assets use the fluid in question.
- Store fluid documents (MDSD/TDS).



1	User Name	2	Users
3	Fluid database	4	Tasks
5	Laboratory	6	Assets
7	Home		

EN



1	User Name	2	Users
3	Fluid database	4	Tasks
5	Laboratory	6	Assets
7	Home		

## 23. Fluid Database - Adding a Fluid

Users can add a fluid by clicking the button "Add New Fluid". The primary information is split into:

- the Manufacturer (e.g. Shell),
- Name (e.g. Gadinia S3 40) and
- Grade (e.g. 128).

Once saved it will be available for you to use.

The screenshot shows a modal window titled "Add New Fluid" with a close button (X) in the top right corner. The form contains three input fields: "Manufacturer" (a dropdown menu), "Name" (a text input), and "Grade" (a text input). At the bottom of the form is a blue "Add" button. Yellow callout lines with numbers 1 through 5 point to the following elements: 1. The title bar, 2. The Manufacturer dropdown, 3. The Name text input, 4. The Grade text input, and 5. The Add button.

1	Add new fluid	2	Enter manufacturer name
3	Enter fluid name	4	Enter fluid grade
5	Add		

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## 24. Generating PDF reports

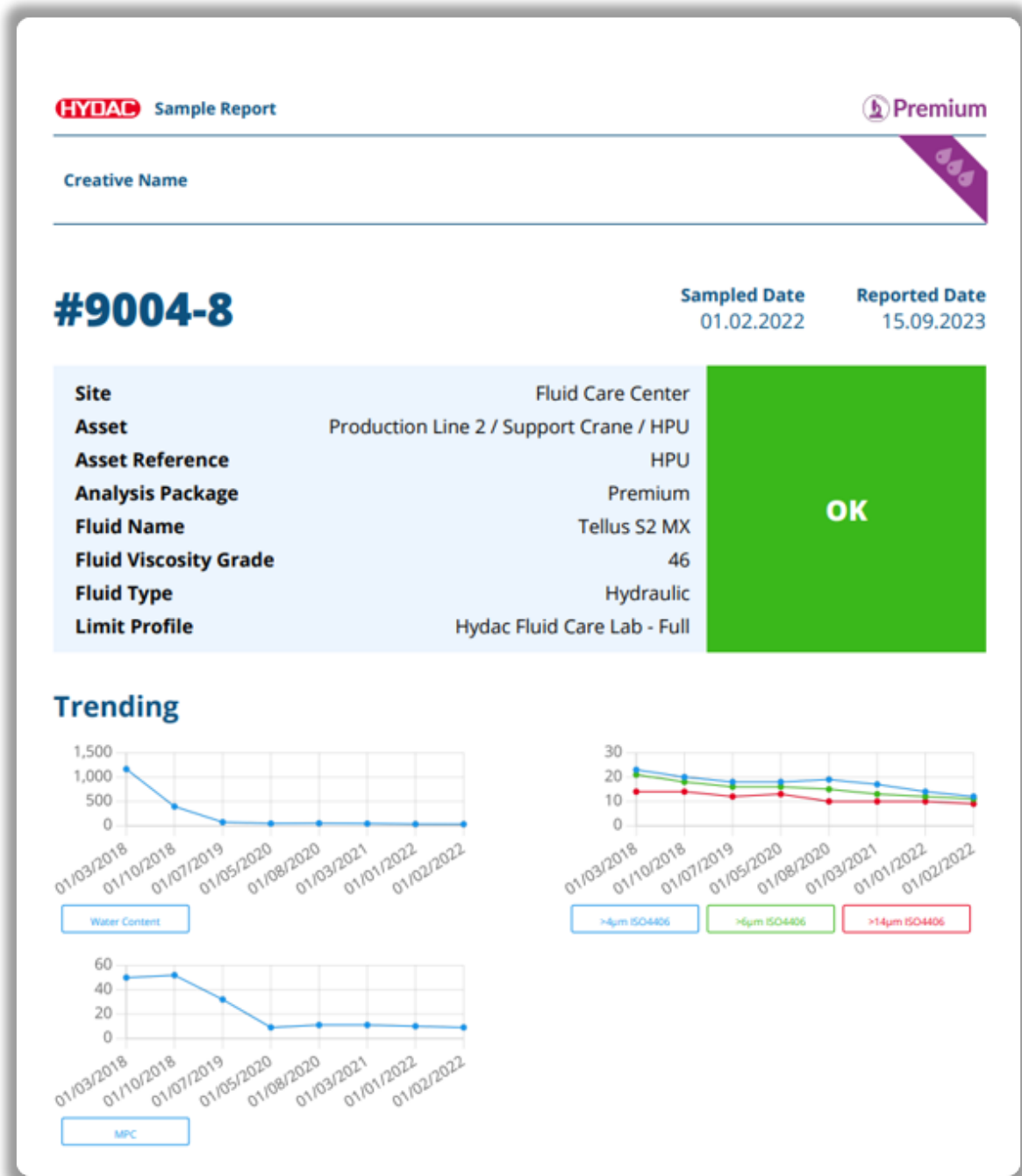
1. Head to the sample report overview as in the figure below. and select the reports you wish to generate as a printable PDF.
2. The box will appear in at the bottom of the screen, now you can choose to delete the reports or download them.

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The screenshot shows the 'Laboratory' interface with the 'Samples Overview' section. The page title is 'Laboratory' and the sub-section is 'Samples Overview' with '323 Complete' samples. There is a 'Downloads' button in the top right. Below the title, there are search and filter options: 'Q Search', 'Site', 'Asset', 'Grouped By', and 'Sort By'. A 'Showing 25' dropdown is also present. The main table has the following columns: '#', 'Site', 'Asset', 'Sampled At', 'Condition', and 'Status'. The table contains several rows of data, with the first two rows selected. A blue bar at the bottom of the table area contains the text 'You have selected one or multiple samples' and a 'Download' button.

#	Site	Asset	Sampled At	Condition	Status
<input checked="" type="checkbox"/> 665493	Belgien	andfaddf	18.09.2024	OK	COMPLETE
<input checked="" type="checkbox"/> 665492	Belgien	andfaddf	30.08.2024	OK	COMPLETE
<input type="checkbox"/> 665491	Belgien	andfaddf	15.08.2024	OK	COMPLETE
<input type="checkbox"/> MIPCTEST1	Canning Plant	Line 1	13.09.2024	CRITICAL	COMPLETE
<input type="checkbox"/> 332211	Wind Farm 1	Gear Box	10.09.2024	OK	COMPLETE
<input type="checkbox"/> 5472	Calibration	AS10001	01.04.2024	ALERT	COMPLETE
<input type="checkbox"/> 5477	Wind Farm 1	Gear Box	01.09.2024	OK	COMPLETE
<input type="checkbox"/> 5478	MRX Test Site 1	MRX Asset3	01.09.2024	OK	COMPLETE

Once your reports are downloaded, they will appear as a zip file in your downloads folder. Here you can access the selected reports and view.



## 25. Settings

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DEMO

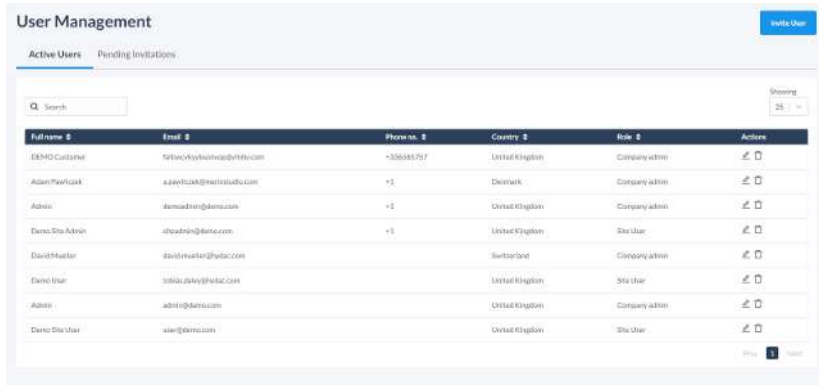
- Home
- Assets
- Task
- Laboratory
- Users**

POWERED BY **HYDAC** [Cookie Settings](#)

## 26. User List - Overview

Clicking the "Users" icon in the bottom left corner of the page will open a list of users for your company. From here, you can see who has access and whether they have successfully logged in yet. If they have not, the word "Pending" can be seen next to their name.

A Company Admin user can invite other users to the software by clicking on the invite User tab.



The screenshot shows the 'User Management' interface. At the top, there are tabs for 'Active Users' and 'Pending Invitations'. A search bar is located at the top left, and a 'Showing 25' dropdown is at the top right. The main content is a table with the following columns: Full Name, Email, Phone No., Country, Role, and Actions. The table contains 8 rows of user data.

Full Name	Email	Phone No.	Country	Role	Actions
DEMO Customer	tdemo@hydac.com	+356881757	United Kingdom	Company admin	[Edit] [Delete]
Adam Pawlczak	a.pawlczak@hydac.com	+1	Denmark	Company admin	[Edit] [Delete]
Admin	admin@demo.com	+1	United Kingdom	Company admin	[Edit] [Delete]
Demo Site Admin	thead@demo.com	+1	United Kingdom	Site User	[Edit] [Delete]
David Mueller	d.mueller@hydac.com		Switzerland	Company admin	[Edit] [Delete]
Demo User	tdemo@demo.com		United Kingdom	Site User	[Edit] [Delete]
Admin	admin@demo.com		United Kingdom	Company admin	[Edit] [Delete]
Demo Site User	site@demo.com		United Kingdom	Site User	[Edit] [Delete]

## 27. Description of User Roles

### Company Admin only

The Fluid Care Portal uses permissions to handle users' access within the software. It is based on a table where access can be given to "View", "Create", "Edit", "Delete" and "Manage" by selecting the needed right to use.

- View: Access to view information
- Create: Access to create information
- Edit: Access to edit content of information
- Delete: Access to delete content
- Manage: Further admin rights specific to the permission category

The current customer user roles are the following:

- Company admin
- Company user
- Site Admin including Invite Permission
- Site User

To select specific "Site" permissions, the user must first be assigned as "Company User", and then given rights to the "Site" Permissions. A "Site Admin" role therefore overwrites the "Company User" role, but only for the selected site. "Company user" should be used for "Site" controls only and the user will see limited information without "Site" access.

### Inviting a user

- ▶ Fill in necessary user information and choose whether it is a "Company user" or "Company admin".

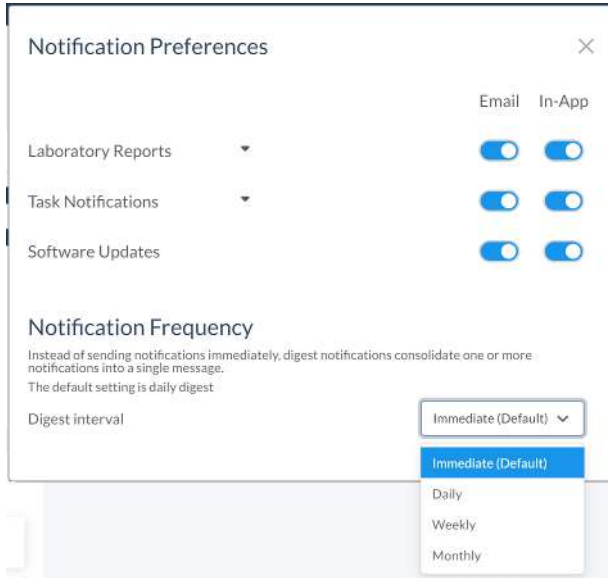
### Notification Settings

The Notification Module in the Fluid Care Portal is designed to keep you updated according to your preferences:

- **Diverse Notifications:** Receive alerts for new samples, sample due dates, task assignments, upcoming task deadlines, new comments, @mentions, and software updates.
- **Flexible Settings:** Choose how you receive these updates, whether through in-app notifications, emails, or both.
- **Digest Frequency:** Opt for immediate notifications or select daily, weekly, or monthly digests to summarize activities.

- **Email Notification:** Distinct email templates are available for each type of notification, with the option to unsubscribe directly from the email.
- **Manual Notifications:** Admins can push crucial notifications to all users or specifically to certain customers.
- **Account Manager Notifications:** HYDAC Account Managers are automatically notified about activities related to their customers.

This module empowers you to stay informed on your terms, ensuring you are always in the loop with the Fluid Care Portal.



## 28. Feedback Tool

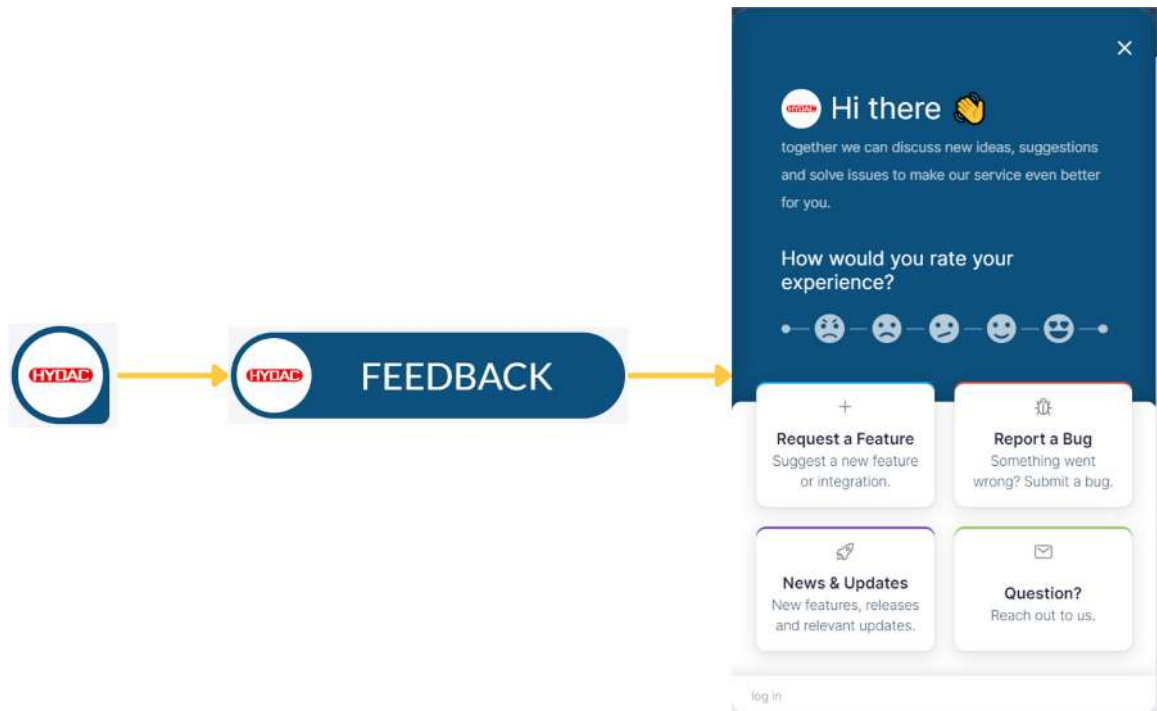
Your feedback is an essential part of the continued growth and development of the Fluid Care Portal. The best and easiest way for you to do this is through the feedback tool built into the software.

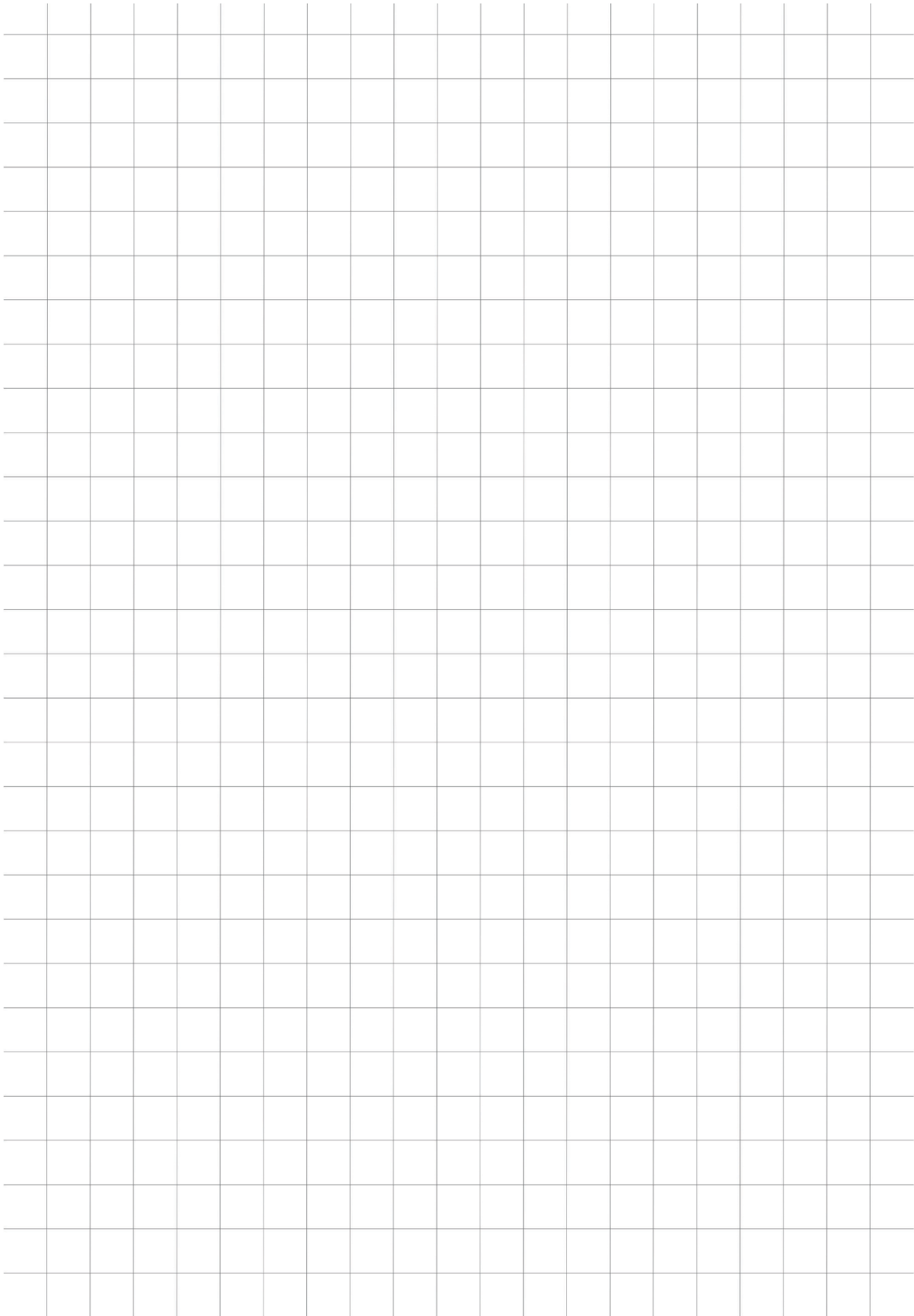
1. Click on the feedback button on the bottom-right corner of your screen.
2. When clicking on the feedback module, a little menu pops up. From here you can choose "Request a Feature", "Report a Bug", "News & Updates" or "Question?".

### Requesting Features or Reporting bugs?

Please always use this tool to report bugs and request new features! Using the tool ensures we do not lose track of important tasks and feedback.

**NOTICE** Note! If you send feedback or report bugs via other channels, you will be requested to use the tool instead.





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