



Designation: D 5704 – 08

Standard Test Method for Evaluation of the Thermal and Oxidative Stability of Lubricating Oils Used for Manual Transmissions and Final Drive Axles¹

This standard is issued under the fixed designation D 5704; the number immediately following the designation indicates the year of original adoption or, in the case of revision, the year of last revision. A number in parentheses indicates the year of last reapproval. A superscript epsilon (ϵ) indicates an editorial change since the last revision or reapproval.

1. Scope

1.1 This test method is commonly referred to as the L-60-1 test.² It covers the oil-thickening, insolubles-formation, and deposit-formation characteristics of automotive manual transmission and final drive axle lubricating oils when subjected to high-temperature oxidizing conditions.

1.2 The values stated in inch-pound units are to be regarded as the standard except for the catalyst weight loss and oil weight measurements, for which the unit is gram; the oil volume, for which the unit is millilitre; the alternator output, for which the unit is watt; and the air flow, for which the unit is milligram per minute. The other SI values, which are in parentheses, are for information only.

1.3 *This standard does not purport to address all of the safety concerns, if any, associated with its use. It is the responsibility of the user of this standard to establish appropriate safety and health practices and determine the applicability of regulatory limitations prior to use.* Specific warning information is given in Sections 7 and 8 and Annex A3.

2. Referenced Documents

2.1 *ASTM Standards:*³

D 224 Classification of Coppers

D 235 Specification for Mineral Spirits (Petroleum Spirits) (Hydrocarbon Dry Cleaning Solvent)

D 445 Test Method for Kinematic Viscosity of Transparent

and Opaque Liquids (and Calculation of Dynamic Viscosity)

D 664 Test Method for Acid Number of Petroleum Products by Potentiometric Titration

D 893 Test Method for Insolubles in Used Lubricating Oils

E 29 Practice for Using Significant Digits in Test Data to Determine Conformance with Specifications

E 527 Practice for Numbering Metals and Alloys in the Unified Numbering System (UNS)

2.2 *ANSI Standard:*⁴

ANSI/ISA-S7.3 Quality Standard for Instrument Air

2.3 *Military Specification:*⁵

MIL-L-2105D Lubricating Oil, Gear, Multipurpose

2.4 *ASTM Adjuncts:*⁶
Engineering Drawings

3. Terminology

3.1 *Definitions:*

3.1.1 *carbon, n—in manual transmissions and final drive axles*, a hard, dry, generally black or gray deposit that can be removed by solvents but not by wiping with a cloth.

3.1.2 *lubricant, n—in manual transmission and final drive axles*, lubricating oil.

3.1.3 *sludge, n—in manual transmissions and final drive axles*, a deposit principally composed of the lubricating oil and oxidation products that do not drain from parts but can be removed by wiping with a cloth.

3.1.4 *thermal and oxidative stability, n—in lubricating oils used for manual transmissions and final drive axles*, a lack of deterioration of the lubricating oil under high-temperature conditions that is observed as viscosity increase of the lubricating oil, insolubles formation in the lubricating oil, or deposit formation on the parts, or a combination thereof.

¹ This test method is under the jurisdiction of ASTM Committee D02 on Petroleum Products and Lubricants and is the direct responsibility of Subcommittee D02.B0.03 on Automotive Gear Lubricants & Fluids.

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² Until the next revision of this test method, the ASTM Test Monitoring Center (TMC) will update changes in this test method by means of Information Letters. Information Letters may be obtained from the ASTM Test Monitoring Center, 6555 Penn Ave., Pittsburgh, PA 15206-4489. Attention: Administrator. This edition incorporates revisions in all Information Letters through 07–1. The TMC is also the source of reference oils.

³ For referenced ASTM standards, visit the ASTM website, www.astm.org, or contact ASTM Customer Service at service@astm.org. For *Annual Book of ASTM Standards* volume information, refer to the standard's Document Summary page on the ASTM website.

⁴ Joint standard of ANSI/ISA. Available from Instrument Society of America, 67 Alexander Drive, P.O. Box 12277, Research Triangle Park, NC 27709.

⁵ Available from Standardization Documents Order Desk, DODSSP, Bldg. 4, Section D, 700 Robbins Ave., Philadelphia, PA 19111-5098.

⁶ Detailed drawings necessary for rig construction. Available from ASTM International Headquarters. Order Adjunct No. ADJD5704A.

3.1.5 *varnish, n*—in manual transmissions and final drive axles, a hard, dry, generally lustrous deposit that can be removed by solvents but not by wiping with a cloth.

4. Summary of Test Method

4.1 A sample of the lubricant to be tested is placed in a heated gear case containing two spur gears, a test bearing, and a copper catalyst. The lubricant is heated to a specified temperature and the gears are operated for 50 h at predetermined load and speed conditions. Air is bubbled through the lubricant at a specified rate and the bulk oil temperature of the lubricant is controlled throughout the test. Parameters used for evaluating oil degradation after testing are viscosity increase, insolubles in the used oil, and gear cleanliness.

5. Significance and Use

5.1 This test method measures the tendency of automotive manual transmission and final drive lubricants to deteriorate under high-temperature conditions, resulting in thick oil, sludge, carbon and varnish deposits, and the formation of corrosive products. This deterioration can lead to serious equipment performance problems, including, in particular, seal failures due to deposit formation at the shaft-seal interface. This test method is used to screen lubricants for problematic additives and base oils with regard to these tendencies.

5.2 This test method is used or referred to in the following documents:

5.2.1 American Petroleum Institute (API) Publication 1560-Lubricant Service Designations for Automotive Manual Transmissions, Manual Transaxles, and Axles,⁷

5.2.2 STP-512A—Laboratory Performance Tests for Automotive Gear Lubricants Intended for API GL-5 Service,⁸

5.2.3 SAE J308—Information Report on Axle and Manual Transmission Lubricants,⁹ and

5.2.4 U.S. Military Specification MIL-L-2105D.

6. Apparatus

6.1 A description of essential apparatus features is given as follows, including mandatory equipment type and performance specification where established. See [Annex A1](#) and [Annex A2](#) for schematics and additional information of a general nature. Those wishing to build this test apparatus shall base construction on full engineering drawings (see [6.2](#)). A list of suppliers is available from ASTM International Headquarters.⁶

6.1.1 *Gear Case Assembly*, used in conjunction with a new test bearing, new lip seals, new O-rings, a pair of new test gears, copper catalyst, and the lubricant to be tested. The gear case assembly has been redesigned to incorporate improvements over designs in use prior to this test method. The gear case and associated parts shall be constructed in accordance with the engineering drawings. The gear case and associated parts shall comply in dimension, material, surface finish where

prescribed, and overall design. O-rings and lip seals have been incorporated into this design and are mandatory replacements for the original cork gaskets and shaft slingers used in earlier designs.

6.1.2 *Insulated Oven*, surrounds the gear case assembly and provides insulation sufficient to allow the lubricant temperature to be elevated to and maintained at test temperature conditions. This oven also houses the heaters and heater blower. The oven dimensions, heater, blower, and oven temperature sensor locations are specified in the engineering drawings (see [Annex A1](#) for approximate locations).

6.1.3 *Heater Elements*—Since this test method is extremely sensitive to temperature, the following specified heater elements (two total) are mandatory:

6.1.3.1 *Primary Heater Element*, one only allowed.^{10,11}

6.1.3.2 *Alternator Load Heater*, one only allowed.^{11,12}

6.1.4 *Temperature Controller*, proportional-integral-derivative (PID) type; percent output adjustable.

6.1.5 *Thermocouples*—For determination, recording, and control of the test oil temperature, a 1/8-in. (3.2-mm) Type J open-tip thermocouple is specified. Thermocouples for other data measurements may be used as suitable to the user but in all cases shall be placed behind the baffle plate in the gear box assembly and shall not interfere with normal oil flow patterns during the test.

6.1.6 *Temperature Recorder*, any suitable recording device capable of generating a temperature record using the specified thermocouples and temperature control devices. Temperature traces for tests shall be submitted with the test report.

6.1.7 *Alternator*—The alternator for loading is specified.^{11,13} No substitutions are allowed. Wiring for the alternator shall be modified as shown in the engineering drawings. Modify the alternator load circuit as shown in [Annex A7](#).

6.1.8 *Heater Blower*—The heater blower system shall supply to the insulated oven assembly 29.5 ± 5 ft³/min (835 ± 142 L/min) of air (at free flow conditions) through the 2 1/8-in. (54-mm) diameter blower opening as shown in the engineering drawings. The heater blower may be a cage type blower wheel powered by an electric motor or powered by way of a toothed belt from the main drive shaft.

6.1.8.1 Confirm the heater blower system air flow at laboratory ambient conditions with a Preso Low Loss Venturi Meter^{11,14} (2-in. model LPL-200NF-38) with carbon steel body, 1/4-in. NPT instrument connections and 2-in. 150-lb

¹⁰ The sole source of supply of Chromalox No. 118-553661-505; 1500 W known to the committee at this time is Anderson Bolos, Inc., 24050 Commerce Park Rd., Cleveland, OH 44122-5838.

¹¹ If you are aware of alternative suppliers, please provide this information to ASTM Headquarters. Your comments will be given careful consideration at a meeting of the responsible technical committee,¹ which you may attend.

¹² The sole source of supply of the Ogden FD 1Z0895; 150 W known to the committee at this time is Ogden, 719 W. Algonquin Rd., Arlington Hts., OH.

¹³ The sole source of supply of the Delco-Remy GM Part No. 1105360, Model No. 10-SI Series Type 100, 63 A; 12 V negative ground known to the committee at this time is S. E. Chevrolet Co., 2810 Bishop Rd; Willoughby Hills, OH 44092 or any other GM dealer.

¹⁴ The sole source of supply of the apparatus known to the committee at this time is SW Controls Inc., 2525 East Royalton Road, Broadview Heights, OH 44147.

⁷ Available from the American Petroleum Institute, 1220 L St. NW, Washington, DC 20005.

⁸ Supporting data have been filed at ASTM International Headquarters and may be obtained by requesting Research Report RR: D02-1353.

⁹ Available from Society of Automotive Engineers, 400 Commonwealth Dr., Warrendale, PA 15096-0001.

raised-face process connections and a Dwyer digital manometer,^{11,15} part number 475-00-FM. Perform the verification with the heater elements turned off.

6.1.8.2 Send the Preso Low Loss Venturi Meter together with the Dwyer digital manometer to the specified calibration laboratory¹⁶ for cleaning and calibration at least once a year.

6.1.9 *Air Flow Controller*—The air flow controller^{11,17} shall be capable of controlling the air supply at a flow rate of 22.08 ± 2.01 mg/min (see **Note 1**).

NOTE 1—It has been suggested that 20 to 30 ft of supply line between the air regulator and the mass air flow meter may help to reduce flow meter readout fluctuations.

6.1.10 *Test Gears*, one machine tool change gear (34 teeth, 3/8-in. (9.5-mm) wide and one machine tool change gear (50 teeth, 3/8-in. (9.5-mm) wide).^{11,18}

6.1.11 *Test Bearing*, ball bearing.^{11,19}

6.1.12 *O-ring Seals*, O-ring for the seal plate and O-ring for the cover plate.^{11,19}

6.1.13 *Lip Seals*, two Chicago Rawhide or SKF shaft oil lip seals, part number 6383, are required.^{11,19}

6.1.14 *Speedi-sleeve*, two Chicago Rawhide or SKF speedi-sleeves, part number 99062, are required.^{11,19}

6.1.15 *Joint Radial Seal*, two Chicago Rawhide or SKF joint radial (V-ring) seals, part number 400164, are required.^{11,19}

6.1.16 *Gear Holder Apparatus*, used to hold the test gears during preparation (**Annex A9**).

6.2 All new equipment shall be constructed in accordance with the engineering drawings available as an adjunct from ASTM Headquarters⁶ in order to meet calibration requirements. Builders unable to obtain specified parts and wishing to use substitutes shall request approval from ASTM Subcommittee D02.B0.03.

7. Reagents and Materials

7.1 *Air*, compressed, instrument quality, meeting **ANSI/ISA-S7.3**, that limits dew point, maximum particle size, and maximum oil content of the air at the instrument.

7.2 *Copper Catalyst*, cold-rolled, electrolytic tough pitch copper, conforming to UNS (Unified Numbering System) C11000.^{11,12} The two strips shall be sheared to approximately 9/16 by 1 13/16 in. from 1/16-in. thick stock (approximately 14 by 46 mm from 1.6-mm thick stock).

NOTE 2—For more information on the classification of coppers and the Unified Numbering System (UNS), consult Classification **B 224** and Practice **E 527**, respectively.

¹⁵ The sole source of supply of the apparatus known to the committee at this time is JF Good Company, 11200 Madison Ave., Cleveland, OH 44102.

¹⁶ Bowser-Morner, 4518 Taylorsville Rd., Dayton, OH 45424.

¹⁷ The sole source of supply of the Air Flow Controller Model 840-L-1 known to the committee at this time is Sierra Instruments, Inc., 5 Harris Court, Bldg. L, Monterey, CA 93940.

¹⁸ The sole source of supply of the GA-34 and GA-50 gears known to the committee at this time is Boston Gear Works, 14 Hayward St., Quincy, MA 02171.

¹⁹ The sole source of supply of the R-14 10 ball bearing, No. 2-153 (seal plate O-ring), No. 2-264 (cover plate O-ring), 6383 seals, 400164 seals, and 99062 speedi-sleeves known to the committee at this time is Motion Industries, 4620 Hinckley Parkway, Cleveland, OH 44109.

7.3 *Organic Cleaning Agent*. (**Warning**—Combustible, health hazard (see **Annex A3**).)^{11,20,21}

7.4 *Silicon Carbide Paper*, 180 grit.

7.5 *Solvent*, Use only mineral spirits meeting the requirements of Specification **D 235**, Type II, Class C for Aromatic Content (0-2% vol), Flash Point (142°F/61°C, min) and Color (not darker than +25 on Saybolt Scale or 25 on Pt-Co Scale). (**Warning**—Combustible. Health hazard.) Obtain a Certificate of Analysis for each batch of solvent from the supplier.)

7.6 *Toluene*, commercial grade. (**Warning**—Flammable. Health hazard.) An example of a satisfactory volatile hydrocarbon solvent.

7.7 *Heptane*, commercial grade. (**Warning**—Flammable. Health hazard.) An example of a satisfactory volatile hydrocarbon solvent.

8. Preparation of Apparatus

8.1 *Air Box Temperature Limiting Device*—After initial rig installation, preset the oven air temperature limit to 400°F (204°C). This can be achieved by placing the insulated oven cover in position on the rig and installing the air temperature sensor at a penetration depth of 3 in. (75 mm) below the top inner surface of the cover. Switch on the heaters and circulating fan. Adjust the temperature control device to deactivate the heaters when the air temperature reaches 400°F. This oven temperature limit may later be reduced as outlined in **10.3** to meet rig heat-up requirements.

8.2 *Temperature Recording and Controlling Instrumentation*—Since this test procedure is extremely sensitive to temperature, it is necessary to maintain a periodic check upon the accuracy of all items related to temperature measurement and control. Therefore, immediately after the installation of a new test rig, and before every set of reference tests, the instrumentation used to measure and record the air and oil temperatures shall be calibrated against known standards traceable to NIST.²² For instance, the oil temperature thermocouple and indicating controller shall be calibrated. This can be accomplished by immersing the tip of the probe into an auxiliary temperature-controlled oil bath equipped with a stirrer. The bath temperature shall be set accurately at 325°F (162.8°C) and the test measuring equipment shall be confirmed to be accurate prior to testing.

8.3 *Gear Case*—Using the organic cleaning agent (see **7.3**), clean the gear case, vent tube, vent tube baffle, retainer bushings, seal sleeves, case cover plate, seal plate, nuts, studs, flat washers, baffle plate, spacer bushings, bearing bushings and clamp, keys, shaft ends, shaft nuts, and catalysts. Nylon bristle brushes, steel brushes, and long pipe cleaners can be used to aid cleaning. Do not use any copper or copper-containing brushes or material as a cleaning medium. Following the cleaning procedure with an organic cleaning agent, wash parts thoroughly with cleaning solvent (see **7.5**), and

²⁰ The sole source of supply of the apparatus known to the committee at this time is Oakite Products, Inc., 13177 Huron River Dr., Romulus, MI 48174.

²¹ The sole source of supply of the apparatus known to the committee at this time is Pentone Corp., 74 Hudson Ave., Tenafly, NJ 07670.

²² National Institute of Standards and Technology (formerly National Bureau of Standards), Gaithersburg, MD 20899.

finally with a volatile hydrocarbon solvent (see 7.6 or 7.7), to facilitate air drying. Allow parts to air dry.

8.4 *Test Gears*—Thoroughly clean the test gears with cleaning solvent (see 7.5). Carefully examine the gear teeth for nicks and burrs. Do not use gears with major imperfections. Redress minor gear teeth imperfections with a fine stone or file. After final examination, wash gears once more with cleaning solvent and finally with a volatile hydrocarbon solvent, to facilitate air drying. Allow gears to air dry.

8.4.1 Prepare each gear with one piece of Screen-Kut silicon carbide C-180 paper.^{11,23} Use one side of the silicon carbide paper to prepare one side of a gear. Use the opposite side of the silicon carbide paper to prepare the opposite side of the gear. Place a piece of silicon carbide paper on a solid surface that has a thickness greater than or equal to ½ in. Saturate the entire silicon carbide paper with cleaning solvent (see 7.5). Sand both sides of the test gears, with the required gear holder apparatus (6.1.16) on the silicon carbide paper, using a figure eight motion. Do not apply a downward force to the gear holder while sanding. Sand the gears until the manufacturer's machining marks are removed. Prepare the test gears prior to the catalyst. A third sheet of silicon carbide paper may be used to prepare the catalyst strips. After final examination, wash gears once more with cleaning solvent (see 7.5) and finally with a volatile hydrocarbon solvent, to facilitate air drying. Allow gears to air dry. If the gears are not to be used immediately, wrap them in a paper towel and Nox-Rust paper.^{11,24} Start the test within 24 h after polishing is completed.

8.4.2 Discard the test gears if not used within 24 h.

8.5 *Test Bearing*—Prior to installation, wash the test bearing first with cleaning solvent (see 7.5), and finally with a volatile hydrocarbon solvent, to facilitate drying. Allow the bearing to air dry.

8.6 *Copper Catalyst*:

8.6.1 Notch one strip for purpose of identification. The notch shall be triangular in shape centered on the long side of the strip. Sides of the triangular notch shall be equal and approximately 0.2 in. (approximately 5 mm) in length.

8.6.2 Polish both catalyst strips on all six sides with a 180-grit silicon carbide paper.

8.6.3 Wipe both catalyst strips with absorbent cotton pads moistened with cleaning solvent (see 7.5), and wash with a volatile hydrocarbon solvent, to facilitate drying. Allow catalyst strips to air dry.

8.6.4 Record the weight of the catalyst with the notched strip to the nearest 0.0001 g prior to installation. Handle cleaned catalyst strips with one of the following: new nitrile gloves, new latex gloves, tweezers, or ashless filter paper to avoid contamination of the catalyst surface from skin contact.

8.7 *Gear Case Assembly*—Assemble the gear case components (see Annex A2 for exploded view).

8.7.1 Inspect all parts prior to assembly of the gear case. Replace any parts that would affect proper rig operation (for

example, overly worn parts). Parts replacement is left to the discretion of the rig builder. A modified seal plate, detailed on gear case drawing number C-3963-1277-2⁶ may be used to facilitate removal of the lip seals.

8.7.2 Use new elastomer components (O-rings and lip seals) for each test.

8.7.3 Install the retainer bushings and seal sleeves. Replace the seal sleeves if they are grooved.

8.7.4 Install the lip seals and O-ring seal in the seal plate. The application of gasket sealant^{11,25} to the lip seals to prevent oil leaks is an approved option.

8.7.5 Install the seal plate in the gear case, using the flat washers to protect the seal plate surface from damage. Torque the seal plate retaining studs to approximately 25 lbf-in. (approximately 2.8 N-m).

8.7.6 Install the external retaining rings on the upper and lower shafts.

8.7.7 Install the upper and lower spacer bushings on the upper and lower shafts.

8.7.8 Install the baffle plate and catalyst holder and torque to approximately 25 lbf-in. (approximately 2.8 N-m), using the flat washers to protect the baffle plate and catalyst holder surfaces.

8.7.9 Insert the bearing into the test bearing clamp with the bearing clamp shoulder on the opposite side of the bearing manufacturer's number. Use the bearing clamp cap screw to bolt the bearing clamp closed and torque to approximately 25 lbf-in. (approximately 2.8 N-m). Install the locking nut to ensure that the bolt does not move during the test.

8.7.10 Insert the test bearing bushing into the test bearing with the bearing bushing shoulder on the same side of the bearing as the manufacturer's number. Install this entire assembly on the lower shaft so that the bearing manufacturer's number faces the front of the gear case. If the bearing assembly has been assembled properly, the bearing clamp arm will be on the opposite side of the gear case as the catalyst holder.

8.7.11 Install the large gear (GA-50) on the lower shaft and the small gear (GA-34) on the upper shaft along with the shaft keys. Install the test gears so that the manufacturer's name faces the front of the case. Install the retaining nuts and torque to approximately 90 lbf-in. (approximately 10 N-m). The gear retaining nuts are different since the lower shaft is right-hand thread and the upper shaft is left-hand thread.

8.7.12 Insert the test oil thermocouple so that the tip protrudes perpendicular to the slanted lower right side of the gear case assembly and protrudes 0.50 ± 0.04 in. (13 ± 1 mm) into the gear case.

8.7.13 Insert catalysts in the grooves on the catalyst holder. Catalysts shall be sized for a tight fit in the catalyst holder to avoid movement of the catalysts during the test. Placement of the notched strip toward the rear of the gear case with the notch facing rearward is recommended for ease of catalyst removal after test with minimal disturbance of deposits.

8.7.14 Install the O-ring seal on the gear case cover.

²³ The sole source of supply of the apparatus known to the committee at this time is McMaster-Carr Supply Company, part number 4677A14.

²⁴ The sole source of supply of the apparatus known to the committee at this time is DaubertVCI, Inc., 1333 Burr Ridge Parkway, Suite 200, Burr Ridge, IL 60527.

²⁵ The sole source of supply of the Perfect Seal Gasket Maker No. 4, Part No. 1050026 known to the committee at this time is P.O.B. Manufacturing Inc., 1100 Kenwood Road, Cincinnati, OH 45242.

8.7.15 Install the gear case cover and torque the cap screws to approximately 25 lbf-in. (approximately 2.8 N·m).

8.8 *Air Supply Line*—Ensure that the air supply line is free from obstructions and then connect the air supply line to the bottom of the gear case.

8.9 *Insulated Oven Cover*—Ensure that the oven temperature sensor is at a penetration depth of 3.0 ± 0.2 in. (76 ± 5 mm) below the top inner surface of the cover (see 7.5). Install the cover on the rig.

8.10 *Air Flow Controller Calibration*—Prior to the start of a calibration cycle on a stand, calibrate the air flow controller to a traceable standard. Calibrate the traceable standard a minimum of once every year to the sole flow rate specification of 22.08 ± 2.01 mg/min at the outlet and 30 psig (206 kPa) inlet pressure. Connect the calibrated traceable standard, Sierra Top Trak Model 822S-L-2-OV1-V1-A1 or 822S-L-2-OV1-PV1-V4-A1, to the inlet of the Sierra Side Trak Model 840. Connect the outlet line of the Sierra Side Trak Model 840 to the gear box. Install an air pressure measurement device to monitor and regulate the inlet pressure to 30 psig (206 kPa). Charge the gear box with a commercial 80W-90 grade oil and bring to test conditions [$325 \pm 1^\circ\text{F}$ ($162.8 \pm 0.5^\circ\text{C}$) at 1750 ± 50 r/min]. Remove the Top Trak after completing the calibration.

9. Calibration and Standardization

9.1 Reference oils for stand calibration are available from the TMC.² Laboratories wishing to calibrate test stands using these reference oils shall participate in the referencing and stand calibration program administered for this test by the TMC (see Note 3 and Annex A4).

NOTE 3—*TMC Acceptance Criteria*—Reference oil performance and test operations for this test method are currently monitored by the TMC. Statistics for reference test starts are published periodically by the TMC and provide acceptance ranges for the various reference oils. Users of the test method should contact the TMC for the most current values for evaluation of referencing status.

9.2 To ensure that uniform results are being obtained in the test, calibration of test stands shall be completed by testing reference oil samples supplied by the TMC at the time calibration or recalibration is required.

9.2.1 *New Test Stand Calibration*—For a new test stand, reference tests as prescribed by the TMC shall be completed, giving results within the established limits for the reference oils. Inspection of the new test stand for compliance with this test method by the TMC is also required.

9.2.2 *In-Service Stand Calibration*—For a previously referenced test stand, reference tests giving results within the established limits for those oils shall be conducted at the frequency specified by the TMC (currently every ten tests or three months, whichever occurs first). Test oils for this purpose are distributed as blind coded samples by the TMC when request for calibration is received. All test starts and test data using reference oils shall be reported to the TMC. Calibration frequency is subject to change as required. Current calibration information is available from the TMC.

9.3 *Reference Oil Test Frequency*—Reference oil test frequency may be adjusted due to the following reasons:

9.3.1 *Procedural Deviations*—On occasions when a laboratory becomes aware of a significant deviation from the test

method, such as might arise during an in-house review or a TMC inspection, the laboratory and the TMC shall agree on an appropriate course of action to remedy the deviation. This action may include the shortening of existing reference oil calibration periods.

9.3.2 *Parts and Fuel Shortages*—Under special circumstances, such as industry-wide parts or fuel shortages, the surveillance panel may direct the TMC to extend the time intervals between reference oil tests. These extensions shall not exceed one regular calibration period.

9.3.3 *Reference Oil Test Data Flow*—To ensure continuous severity and precision monitoring, calibration tests are conducted periodically throughout the year. There may be occasions when laboratories conduct a large portion of calibration tests in a short period of time. This could result in an unacceptably large time frame when very few calibration tests are conducted. The TMC can shorten or extend calibration periods as needed to provide a consistent flow of reference oil test data. Adjustments to calibration periods are made such that laboratories incur no net loss (or gain) in calibration status.

9.3.4 *Special Use of the Reference Oil Calibration System*—The surveillance panel has the option to use the reference oil system to evaluate changes that have potential impact on test severity and precision. This option is only taken when a program of donated tests is not feasible. The surveillance panel and the TMC shall develop a detailed plan for the test program. This plan requires all reference oil tests in the program to be completed as close to the same time as possible, so that no laboratory/stand calibration is left in an excessively long pending status. In order to maintain the integrity of the reference oil monitoring system, each reference oil test is conducted so as to be interpretable for stand calibration. To facilitate the required test scheduling, the surveillance panel may direct the TMC to lengthen and shorten reference oil calibration periods within laboratories such that the laboratories incur no net loss (or gain) in calibration status.

9.4 *Donated Reference Oil Test Programs*—The Surveillance Panel is charged with maintaining effective reference oil test severity and precision monitoring. During times of new parts introductions, new or re-blended reference oil additions, and procedural revisions, it may be necessary to evaluate the possible effects on severity and precision levels. The surveillance panel may choose to conduct a program of donated reference oil tests in those laboratories participating in the monitoring system, in order to quantify the effect of a particular change on severity and precision. Typically, the surveillance panel requests its panel members to volunteer enough reference oil test results to create a robust data set. Broad laboratory participation is needed to provide a representative sampling of the industry. To ensure the quality of the data obtained, donated tests are conducted on calibrated test stands. The surveillance panel shall arrange an appropriate number of donated tests and ensure completion of the test program in a timely manner.

9.5 Every test start on any test stand shall receive a sequential test run number designated before testing begins. All tests, including aborted starts and operationally invalid tests, shall retain their test number.

9.6 *Instrumentation Calibration*—Prior to a reference oil test, calibrate the large gear shaft speed system, alternator output system, blower motor output system, air flow controller system, air box temperature control system, and oil temperature control system against known standards traceable to NIST.

9.7 Consider as non-interpretable any non-reference oil test that has not been run in a calibrated test stand or not conducted on approved hardware, or both. Indicate on the cover page of the test report that the test is non-interpretable and that it has not been conducted in a valid manner in accordance with the test method.

10. Procedure for Conducting the Test

10.1 Pour 120 ± 5 mL of the lubricant to be tested into a clean container. Weigh the container of oil. Charge the gear case with the test lubricant. Reweigh the container and determine the oil charged by subtraction. Record the weight of the test oil charge to the nearest 0.01 g.

10.2 Preset air flow rate to 22.08 ± 2.01 mg/min.

10.3 Record the time, turn on the main drive motor, and adjust the temperature control system to maintain the bulk test lubricant temperature at $325 \pm 1^\circ\text{F}$ ($162.8 \pm 0.6^\circ\text{C}$). The bulk oil test temperature shall be heated from ambient to 324°F (162.2°C) in a minimum of 45 min. This heat-up time shall not exceed 60 min. Tests with heat-up times less than 45 min or greater than 60 min are not representative of an operationally valid test and, therefore, cannot be properly interpreted for non-reference oil evaluation. The end-of-heat-up/test start time shall be the first occurrence of 324°F (162.2°C).

10.3.1 Record all operational data at a minimum of once every 15 min. A reading out of specification using once-every-15 min data recording is considered to be out for the full 15 min unless otherwise documented.

10.4 If the rig heat-up time is less than 45 min, the oven temperature limit should be reduced until the heat-up time is equal to or greater than 45 min but less than 60 min. A possible cause of heat-up times greater than 60 min is improper fit between the insulated oven and insulated oven cover or other areas of excessive oven thermal leakage, or both. Under no circumstances shall the oven temperature limit be set higher than 400°F (204°C). The rig heat-up time should be checked prior to every set of reference tests to ensure consistent rig performance.

10.5 Adjust the field supply of the alternator for a net output of 128 ± 5 W.

10.6 The large gear shall maintain a speed of 1750 ± 50 r/min throughout the heat-up and test time.

10.7 Run the test at the conditions specified for 50.0 ± 0.1 h. Terminate the test if more than 5 min of total downtime occurs during the test period. Record any downtime on Form 4, **Annex A5**.

10.7.1 A downtime occurrence is defined as the time at which the test is shut down until the time the test returns to test operating specifications.

10.7.2 Do not calculate percent deviations during downtime occurrences.

10.7.3 Record all operational data at a minimum of once every hour. A reading out of specification using once-every-

hour data recording is considered to be out for the full hour unless otherwise documented.

10.8 At the completion of the test, immediately shut down the equipment, remove the air line, and drain the test lubricant into a clean weighed container. The gear case cover plate may be loosened to facilitate draining, but do not remove it. Drain the test stand for 30 ± 5 min. Weigh the container of drain oil, and determine the drain oil weight by subtraction. Calculate the oil loss in weight percent using Eq 1. Tests exceeding 20 % weight oil loss are not representative of an operationally valid test and, therefore, cannot be properly interpreted for non-reference oil evaluation.

$$\text{oil loss in weight \%} = \frac{\text{initial weight} - \text{final weight}}{\text{initial weight}} \times 100 \quad (1)$$

where:

initial weight = initial oil charge weight, and
final weight = drain oil weight.

10.9 At the completion of the oil weight loss calculation, transfer the entire oil drain, including solids, using a flat-bladed stainless steel tool from the weighed container into a single sample bottle for kinematic viscosity, pentane insolubles, toluene insolubles, and total acid number evaluation as outlined in Section 13. The single sample bottle contents shall be homogenous prior to kinematic viscosity, pentane insolubles, toluene insolubles, and total acid number evaluation.

10.10 Remove the gear case cover and test gears within 60 + 5 min of test completion without disturbing the deposits on the various test gears.

11. Procedure for Determination of the Gear Cleanliness Ratings²⁶

11.1 Evaluation of the test gears is performed after removing the catalyst strips, test gears, test bearing, and internal gear case components.

11.2 After gear case disassembly, as specified in 10.10, immediately place test parts side-by-side in a draining position (a draining position is a position within 15° of vertical.) at room temperature for a minimum of 1 h before rating. Rate the test parts within 64 h of test completion.

11.3 *Gear Sludge Rating:*

11.3.1 Wipe an approximately $\frac{3}{4}$ -in. (20-mm) wide area across the diameter along the key way on each face of both large and small test gears. Rate each gear face for sludge individually.

11.3.2 The total ratable area for sludge on each gear face excludes the wiped area, gear teeth, and spacer bushing contact area.

11.3.3 Subdivide the total ratable area into percentage areas of different sludge depths and ratings using CRC Manual No. 20 (utilizing the sludge scale and sludge gage, which are included in the manual) as a guide. Calculate and record the sludge volume factor for each subdivided area. The total volume factor for a gear face is determined by adding the individual area volume factors for that gear face.

²⁶ Training for those rating gear sets for cleanliness parameters may be obtained from Coordinating Research Council (CRC), 219 Perimeter Ctr. Pkwy., Atlanta, GA 30346.