Contamination Control Fundamentals

Why Filter?

Over 70% of all hydraulic system failures are caused by contaminants in the fluid. Even when no immediate failures occur, high contamination levels can sharply decrease operating efficiency.

Contamination is defined as any substance which is foreign to a fluid system and damaging to its performance. Contamination can exist as a gas, liquid or solid. Solid contamination, generally referred to as particulate contamination, comes in all sizes and shapes and is normally abrasive.

High contaminant levels accelerate component wear and decrease service life. Worn components, in turn, contribute to inefficient system operation, seizure of parts, higher fluid temperatures, leakage, and loss of control. All of these phenomena are the result of direct mechanical action between the contaminants and the system components. Contamination can also act as a catalyst to accelerate oxidation of the fluid and spur the chemical breakdown of its constituents.

Filtering a system's fluid can remove many of these contaminants and extend the life of system components.

How a System Gets Contaminated

Contaminants come from two basic sources: they either enter the system from outside (ingestion) or are generated from within (ingression). New systems often have contaminants left behind from manufacturing and assembly operations. Unless they are filtered as they enter the circuit, both the original fluid and make-up fluid are likely to contain more contaminants than the system can tolerate. Most systems ingest contaminants through such components as inefficient air breathers and worn cylinder rod seals during normal operation. Airborne contaminants are likely to gain admittance during routine servicing or maintenance. Also, friction and heat can produce internally generated contamination.

Figure 1. Typical Examples of Wear Due to Contamination

| Vanes for Vane Pump | Relief Valve Piston | Vane Pump Cam Ring |

Size of Solid Contaminants

The size of solid particle contaminants is commonly measured in micrometers, μm, (usually referred to as microns, μ). A micron is a unit of length equal to one millionth of a meter or about .00004 inch. Particles that are less than 40 μ cannot be detected by the human eye.
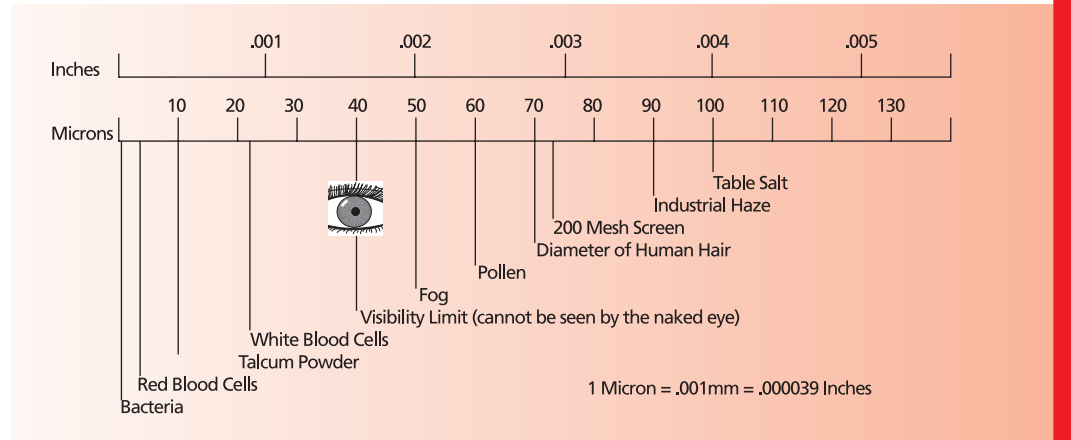
Substance	Microns	Inches
Grain of table salt	100 μ	.0039"
Human hair	70 μ	.0027"
Talcum powder	10 μ	.00039"
Bacteria (average)	2 μ	.000078"

Figure 2 shows the sizes of some common substances. To gain some perspective, consider the diameters of the following substances:

A *micron rating* identifies the size of particles that a particular filtration media will remove. For instance, Schroeder Z10 filter media is rated at ß10 ≥1000, meaning that it can remove particles of 10 μ and greater at 99.9% efficiency.

Figure 2. Sizes of Known Particles in Inches and Microns

Inches
.001 .002 .003 .004 .005

Microns
10 20 30 40 50 60 70 80 90 100 110 120 130

Table Salt
Industrial Haze
200 Mesh Screen
Diameter of Human Hair
Pollen
Fog
Visibility Limit (cannot be seen by the naked eye)
White Blood Cells
Talcum Powder
Red Blood Cells
Bacteria

1 Micron = .001mm = .000039 Inches
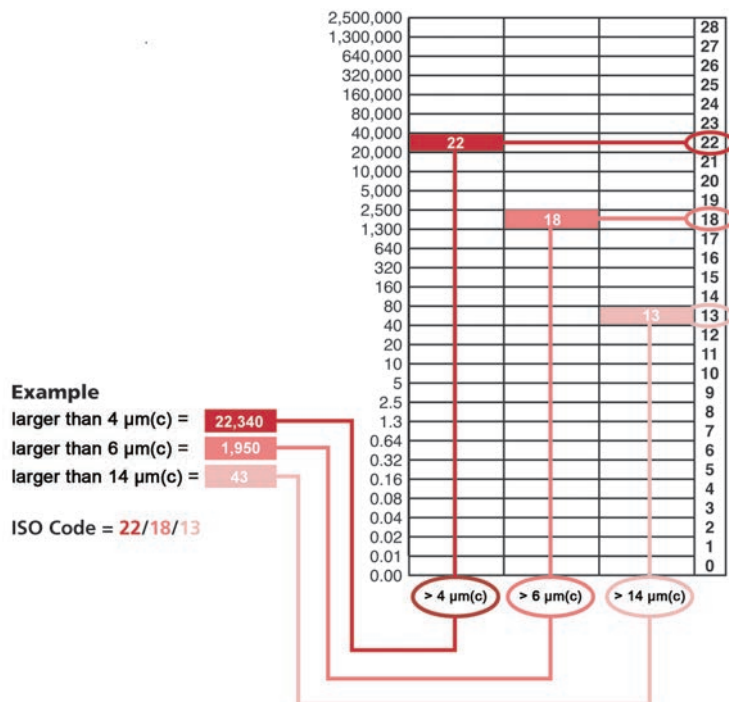
How Contaminants are Measured and Reported

In hydraulic fluid power systems, power is transmitted and contained through a liquid under pressure within an enclosed circuit. These fluids all contain a certain amount of solid particle contaminants. The amount of particulate contaminants present in a hydraulic or lubrication system's fluid is commonly referred to as its cleanliness level.

ISO Scale Numbers– ISO 4406:1999

ISO 4406:1999 provides guidelines for defining the level of contamination present in a fluid sample in terms of an ISO rating. It uses three scale numbers, representing the number of particles greater than or equal to 4 µ(c), 6 µ(c), and 14 µ(c) in size per 1 mL of sample fluid.

Figure 3 shows the graph used to plot particle counts per ISO 4406:1999.

Example
larger than 4 µm(c) = 22,340
larger than 6 µm(c) = 1,950
larger than 14 µm(c) = 43

ISO Code = 22/18/13

- Reproducibility below scale number 8 is affected by the actual number of particles counted in the fluid sample. Raw counts should be more than 20 particles. If this is not possible, then refer to bullet below.

- When the raw data in one of the size ranges results in a particle count of fewer than 20 particles, the scale number for that size range shall be labeled with the symbol ≥.

EXAMPLE: A code of 14/12/≥7 signifies that there are more than 80 and up to and including 160 particles equal to or larger than 4 µ(c) per mL and more than 20 and up to and including 40 particles equal to or larger than 6 µ(c) per mL. The third part of the code, ≥7 indicates that there are more than 0.64 and up to and including 1.3 particles equal to or larger than 14 µ(c) per mL. The ≥ symbol indicates that less than 20 particles were counted, which lowers statistical confidence. Because of this lower confidence, the 14 µ(c) part of the code could actually be higher than 7, thus the presence of the ≥ symbol.
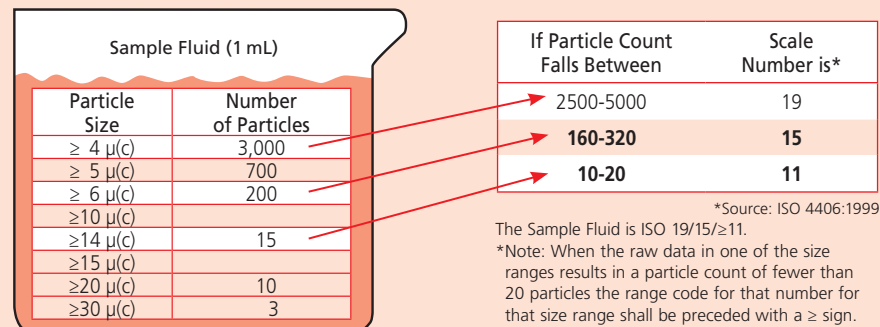
Cleanliness Levels– ISO 4406:1999

The following example shown in Figure 4 illustrates the cleanliness level, or ISO rating, of a typical petroleum-based fluid sample using the ISO Code 4406:1999 rating system.

The fluid sample contains a certain amount of solid particle contaminants, in various shapes and sizes.

Since the number of 4 μ(c) particles falls between 2500 and 5000, the first ISO range number is 19 using Table 1. The number of 6 μ(c) particles falls between 160 and 320 particles, so the second ISO range number is 15. The number of 14 μ(c) particles falls between 10 and 20, making the third range number 11. Therefore, the cleanliness level for the fluid sample shown in Figure 4 per ISO 4406:1999 is 19/15/≥11.

Figure 4. Determining the ISO Rating of a Fluid Using ISO 4406:1999

Sample Fluid (1 mL)

Particle Size	Number of Particles
≥ 4 μ(c)	3,000
≥ 5 μ(c)	700
≥ 6 μ(c)	200
≥10 μ(c)	
≥14 μ(c)	15
≥15 μ(c)	
≥20 μ(c)	10
≥30 μ(c)	3

If Particle Count Falls Between	Scale Number is*
2500-5000	19
160-320	**15**
10-20	**11**

*Source: ISO 4406:1999

The Sample Fluid is ISO 19/15/≥11.

*Note: When the raw data in one of the size ranges results in a particle count of fewer than 20 particles the range code for that number for that size range shall be preceded with a ≥ sign.

Required Cleanliness Levels

The pressure of a hydraulic system provides the starting point for determining the cleanliness level required for efficient operation. Table 2 provides guidelines for recommended cleanliness levels based on pressure. In general, Schroeder defines pressure as follows:

Low pressure: 0-500 psi (0-35 bar)
Medium pressure: 500-2999 psi (35-206 bar)
High pressure: 3000 psi (206 bar) and above

A second consideration is the type of components present in the hydraulic system. The amount of contamination that any given component can tolerate is a function of many factors, such as clearance between moving parts, frequency and speed of operation, operating pressure, and materials of construction. Tolerances for contamination range from that of low pressure gear pumps, which normally will give satisfactory performance with cleanliness levels typically found in new fluid (ISO 19/17/14), to the more stringent requirements for servo-control valves, which need oil that is eight times cleaner (ISO 16/14/11).

Today, many fluid power component manufacturers are providing cleanliness level (ISO code) recommendations for their components. They are often listed in the manufacturer's component product catalog or can be obtained by contacting the manufacturer directly. Their recommendations may be expressed in desired filter element ratings or in system cleanliness levels (ISO codes or other codes). Some typically recommended cleanliness levels for components are provided in Table 3.

Table 2. Cleanliness Level Guidelines Based on Pressure

System Type	Recommended Cleanliness Levels (ISO Code)
Low pressure – manual control (0 - 500 psi)	20/18/15 or better
Low to medium pressure – electrohydraulic controls	19/17/14 or better
High pressure – servo controlled	16/14/11 or better

Table 3. Recommended Cleanliness Levels (ISO Codes) for Fluid Power Components

Components	Cleanliness Levels (ISO Code) 4 μ(c)/6 μ(c)/14 μ(c)
Hydraulic Servo Valves	15/13/11
Hydraulic Proportional Valves	16/14/12
Hydraulic Variable Piston Pump	16/14/12
Hydraulic Fixed Piston Pump	17/15/12
Hydraulic Variable Vane Pump	17/15/12
Hydraulic Fixed Vane Pump	18/16/13
Hydraulic Fixed Gear Pump	18/16/13
Ball Bearings	15/13/11
Roller Bearings	16/14/12
Journal Bearings (>400 rpm)	17/15/13
Journal Bearings (<400 rpm)	18/16/14
Gearboxes	18/16/13
Hydrostatic Transmissions	16/14/11
Pumps	16/14/12

This table is based on data shown in various hydraulic component manufacturer's catalogs. Contact Schroeder for recommendations for your specific system needs.

Table 4. Cleanliness Class Comparisons

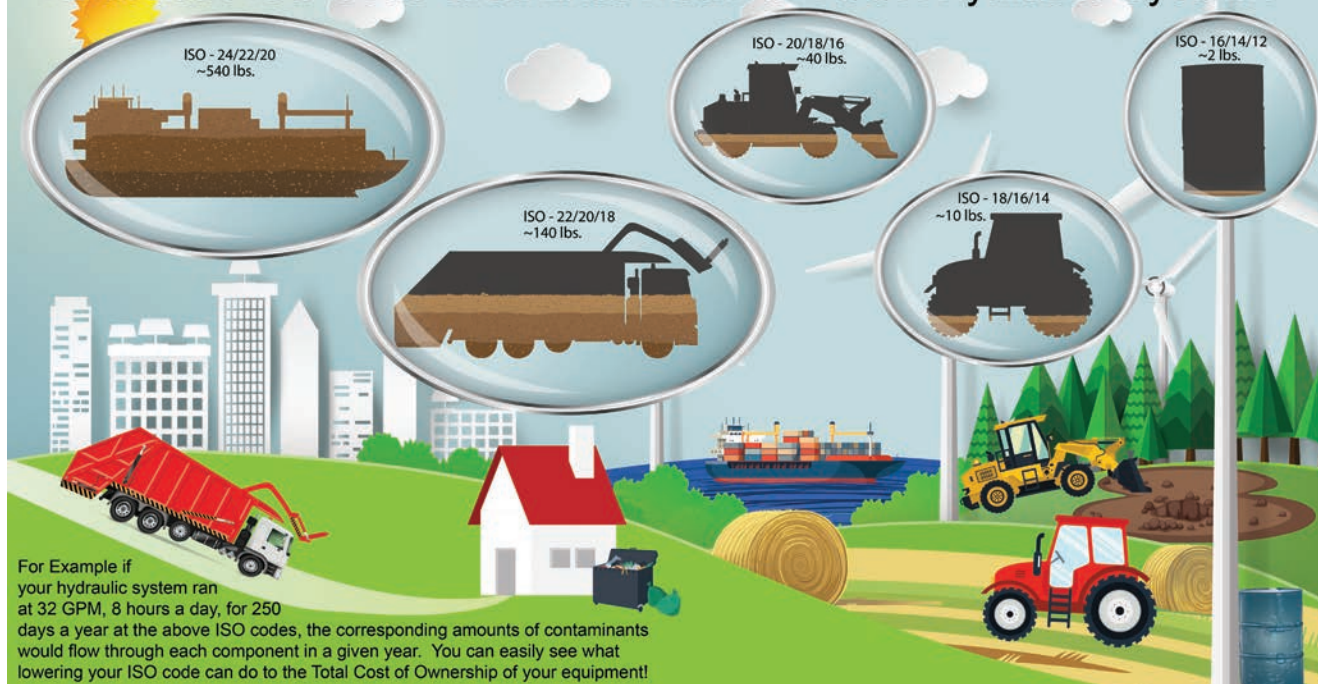| ISO 4409:1999	SAE AS 4059:E	NAS 1638-01/196	MIL-STD 1246A 1967	ACFTD Gravimetric Level-mg/L
24				
23/20/18		12		
22/19/17	12	11		
21/18/16	11	10		
20/17/15	10	9	300	
19/16/14	9	8		
18/15/13	8	7	200	1
17/14/12	7	6		
16/13/11	6	5		
15/12/10	5	4		0.1
14/11/9	4	3	100	
13/10/8	3	2		
12/9/7	2	1		0.01
11/8/6	1	0		
10/7/5	0	00		
8/7/4	00		50	
5/3/01			25	
2/0/0			5	

Required Cleanliness Levels

(continued)

For your convenience, Table 4 provides a cross reference showing the approximate correlation between several different scales or levels used in the marketplace to quantify contamination.
The table shows the code levels used for military standards 1638 and 1246A, as well as the SAE AS4059 standard.

What does ISO Code Cleanlines mean to **YOUR** Hydraulic System?

For Example if your hydraulic system ran at 32 GPM, 8 hours a day, for 250 days a year at the above ISO codes, the corresponding amounts of contaminants would flow through each component in a given year. You can easily see what lowering your ISO code can do to the Total Cost of Ownership of your equipment!

Element Technical Data Fundamentals

Performance Specifications/ Filtration Ratings

Schroeder filter elements meet a wide variety of requirements in today's workplace, from the simplest to the most sophisticated fluid power systems. Established industry standards enable users to select the optimal filter element for any application.

When evaluating the performance of hydraulic filter elements, the most important parameters to consider are:

(a) efficiency

(b) beta stability

(c) dirt holding capacity

(d) pressure drop vs. flow

(a) *Efficiency*, or filtration ratio, expressed by "Beta" (ß) relates to how well an element removes contamination from fluid. Higher efficiency translates to cleaner oil, better protection of system components, less down time for repair, and lower maintenance costs.

(b) *Beta stability* is defined as an element's ability to maintain its expected efficiency as differential pressure across the element increases. Differential pressure will increase as contamination is trapped, or with an increase in fluid viscosity (cold start). Beta stability is important because it relates to how well an element will perform in service over time. When the element is loaded with contamination, or when it is subjected to cold starts, will it perform as well as it did when new?

(c) *Dirt holding capacity (DHC)* is the amount of contamination that an element can trap before it reaches a predetermined "terminal" differential pressure. Dirt holding capacity is related to element life. Since elements with higher DHC need changed less frequently, DHC has a direct impact on the overall cost of operation. When selecting filter elements, it is beneficial to compare DHC of elements with similar particle removal efficiency.

(d) *Pressure Drop vs. Flow* is simply a measure of resistance to fluid flow in a system. It is important to consider the initial pressure drop (Δp) across the filter element (and housing). Ideally, a filter element should be sized so that the initial pressure drop across the clean element (plus the filter housing drop) is less than half the bypass valve setting in the filter housing.

When selecting a filter element for your system, be sure to consider all four of these performance criteria. If an element is strong in three areas, but weak in another, it may not be the right choice. At every level of filtration, Schroeder's Excellement® Z-Media® elements offer the best combination of high efficiency, high beta stability, high dirt holding capacity, and low pressure drop.

The Multi-pass Test

Filter element efficiency ratings, beta stability, and capacities are determined by conducting a multi-pass test under controlled laboratory conditions. This is a standard industry test with procedure published by the International Standards Organization (ISO 16889). The multi-pass test yields reproducible test data for appraising the filtration performance of a filter element including its particle removal efficiency. These test results enable the user to: (1) compare the quality and specifications offered by various filter element suppliers and (2) select the proper filter element to obtain the optimal contamination control level for any particular system.

Hydraulic fluid (Mil-H-5606) is circulated through a system containing the filter element to be tested. Additional fluid contaminated with ISO MTD Test Dust is introduced upstream of the element being tested. Fluid samples are then extracted upstream and downstream of the test element.

Dirt holding capacity is defined as the total grams of ISO MTD Test Dust added to the system to bring the test filter element to terminal pressure drop.

Figure 5. Multi-Pass Test Schematic
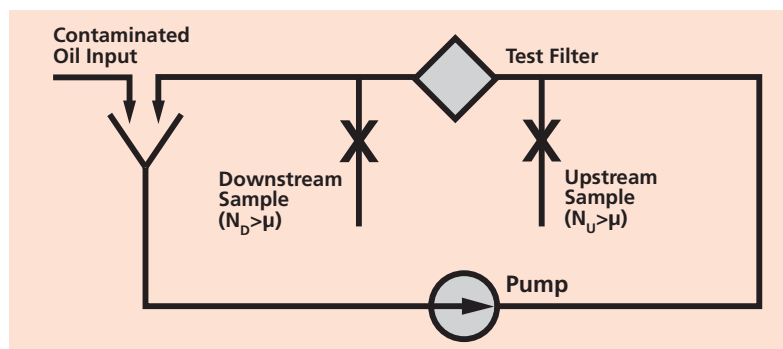
The filtration ratio (more commonly referred to as the Beta ratio) is, in fact, a measure of the particle capture efficiency of a filter element.

Per ISO 16889

$$\beta_{x(c)} = \frac{\text{number of particles upstream @ } x(c) \text{ microns}}{\text{number of particles downstream @ } x(c) \text{ microns}}$$

where $x(c)$ is a specified particle size.

Example: $\beta_{10} = \dfrac{400}{100} = 4$

This particle capture efficiency can also be expressed as a percent by subtracting the number 1 from the Beta (in this case 4) and multiplying it by 100:

$$\text{Efficiency}_{10} = \frac{(4-1)}{4} \times 100 = 75\%$$

The example is read as "Beta ten is equal to four, where 400 particles, 10 microns and larger, were counted upstream of the test filter (before) and 100 particles, 10 microns and larger, were counted downstream of the test filter (after)."

The filter element tested was 75% efficient in removing particles 10 microns and larger.

To calculate a filter element's percent efficiency, subtract 1 from the Beta, divide that answer by the Beta, then multiply by 100.

	Example
Step 1:	$\beta_{10(c)} > +1000$
Step 2:	1000 -1 = 999
Step 3:	999 ÷ 1000 = .999%
Step 4:	.999 x 100 = 99.9%

According to ISO 16889, each filter manufacturer can test a given filter element at a variety of flow rates and terminal pressure drop ratings that fit the application, system configuration and filter element size. Results may vary depending on the configuration of the filter element tested and the test conditions.

Currently, there is no accepted ISO, ANSI, or NFPA standard regarding absolute ratings. Some filter manufacturers use $\beta_x(c) \geq 75$ (98.7% efficiency) for their absolute rating. Others use $\beta_x(c) \geq 100$ (99.0% efficiency), $\beta_x(c) \geq 200$ (99.5% efficiency), or $\beta_x(c) \geq 1000$ (99.9% efficiency). Performance of Schroeder elements is shown in the Element Performance Chart for each filter housing in Sections 3 through 8 at a number of filtration ratios to allow the user to evaluate our performance against that of our competitors.

**Efficiency /
Filtration Ratio
(Beta)**

Efficiency

Filtration Ratio

Beta Stability

Beta stability is defined as an element's ability to maintain its expected efficiency as differential pressure across the element increases. Differential pressure will increase as contamination is trapped, or with an increase in fluid viscosity. An element's beta stability is displayed in the Filtration Ratio (Beta) vs. Differential Pressure curve from a typical multi-pass test report per ISO 16889. Good beta stability is demonstrated by consistent or improving efficiency as differential pressure builds across the element. Conversely, decreasing efficiency as pressure builds is a sign of poor stability. Poor beta stability is an indication of a filter element's structural deficiency. It is a sign of potential problems in a "real world" situation. Contamination, "cold starts", and flow surges can all create high differential pressure across an element that may cause efficiency to decrease if it is not structurally sound. In cases of "cold starts" and flow surges, the media structure in elements with poor stability can become permanently damaged in milliseconds. The result is lower efficiency and decreased system protection without warning to the operator. High beta stability results when an element is well-built with quality, durable materials. Strength of filter media and reinforcement layers, impervious seaming, proper end cap adhesion, and a rigidly supported structure all play a part in an element's beta stability. Excellement® media structure typically maintains beta stability over 100 psi.

Example of poor beta stability – efficiency declines as differential pressure increases.
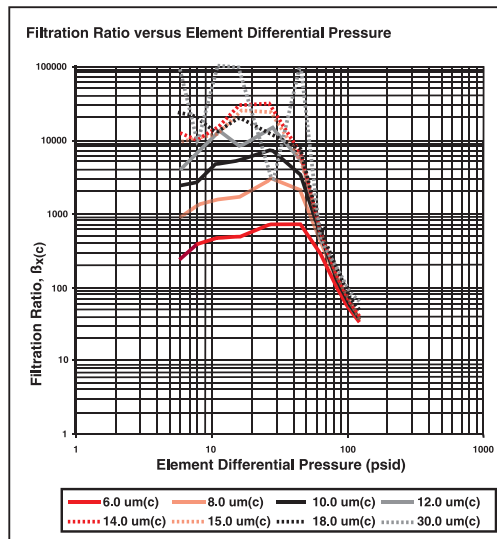
Example of Excellement® beta stability – efficiency does not decline as differential pressure increases.
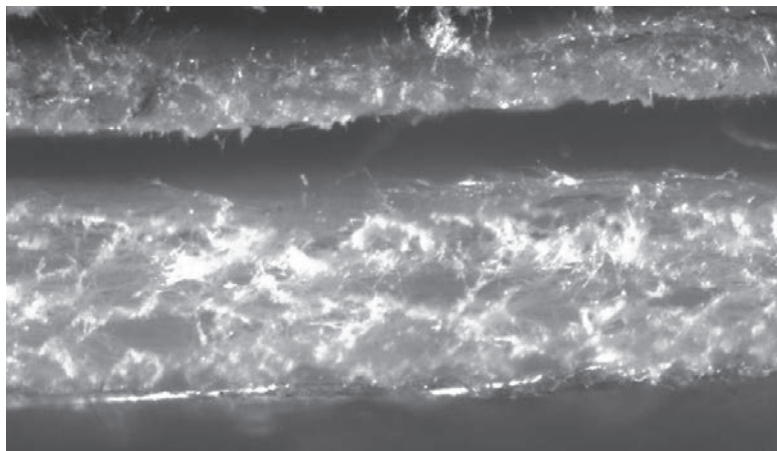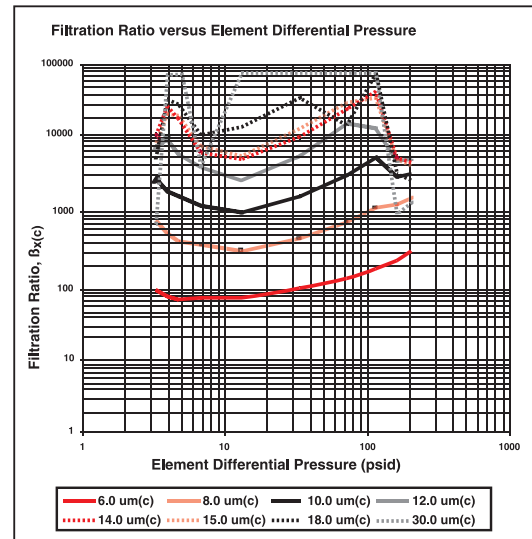
Microscopic Photo - 50x magnification

Top: competitor's media   Bottom: Schroeder Excellement® Z-Media®
Thin, weak media cannot withstand differential pressure as well as Z-Media®.

This photo shows a comparison of our competitors filtering layer media versus our Schroeder Excellement® Z-Media®. Schroeder Z-Media® offers better depth filtration to withstand a higher differential pressure and entrap more contaminant / particles.

Dirt Holding Capacity

Dirt holding capacity (DHC) is the amount of contaminant (expressed in grams) the element will retain before it goes into bypass. All other factors being equal, an element's DHC generally indicates how long the element will operate until it needs to be replaced. The element's life span is directly related to the cost of operating the filter.

Dirt holding capacity, sometimes referred to as "retained capacity," is a very important and often overlooked factor in selecting the right element for the application. The dirt holding capacity of an element is measured in grams of ISO medium test dust contaminant as determined from the multi-pass test (ISO 16889). When selecting filter elements, it is beneficial to compare the dirt holding capacities of elements with similar particle removal efficiencies.

Pressure Drop

When sizing a filter, it is important to consider the initial differential pressure (ΔP) across the element and the housing. Elements offering a lower pressure drop at a high Beta efficiency are better than elements with a high ΔP at the same efficiency. At every level of filtration, Schroeder's Excellement® Z-Media® elements offer the best combination of high efficiency, high stability, high dirt holding capacity, and low pressure drop. The pressure drop of an element is determined by testing according to ISO 3968.

Collapse Rating

The collapse (crush) rating of a filter (determined by ISO 2941/ANSI B93.25) represents the differential pressure across the element that causes it to collapse. The collapse rating of a filter element installed in a filter housing, with a bypass valve, should be at least two times greater than the full flow bypass valve pressure drop. The collapse rating for filter elements used in filter housings with no bypass valve should be at least the same as the setting of the system relief valve upstream of the high-crush element. When a high collapse element becomes clogged with contamination all functions downstream of the filter will become inoperative.

Element Media Selection Considerations
The Right Media for the Right Application=Job Matched Filtration

Filtration Application Guidelines

Selecting the proper Schroeder media for your application is easy if you follow these simple guidelines.

Step 1. Remember that the key to cost effective contamination control is to maintain the system's cleanliness at the tolerance level of the system's most sensitive component. So, the first step is to identify the most sensitive component.

Step 2. Determine the desired cleanliness level (ISO Code) for that component by referring to Figure 3 on page 13 or by contacting the component manufacturer directly.

Step 3. Identify the Schroeder filter medium referencing Table 6 that will meet or exceed the desired cleanliness level.

Step 4. Remember to regularly check the effectiveness of the selected media through the use of contamination monitoring equipment.

Table 6. Schroeder Element Media Recommendations

Desired Cleanliness Levels (ISO Code)	Schroeder Media
20/18/15-19/17/14	Z25
19/17/14-18/16/13	Z10
18/16/13-15/13/10	Z5
15/13/10-14/12/9	Z3
14/12/9-13/11/8	Z1

Effect of Ingression

Filter element life varies with the dirt holding capacity of the element and the amount of dirt introduced into the circuit. The rate of this ingression in combination with the desired cleanliness level should be considered when selecting the media to be used for a particular application. Table 7 provides recommendations accordingly.

The amount of dirt introduced can vary from day to day and hour to hour, generally making it difficult to predict when an element will become fully loaded. This is why we recommend specifying a Dirt Alarm®.

Schroeder-designed Dirt Alarms® provide a vital measure of protection for your system by indicating when the filter element needs to be changed or cleaned. Schroeder filters are available with visual, electrical and electrical-visual combination Dirt Alarms®. These indicators may also be purchased as separate items. For more information on Dirt Alarms®, see Appendix A.

Table 7. Recommended Schroeder Media to Achieve Desired Cleanliness Levels Based on Ingression Level

Desired Cleanliness Levels (ISO Code)	Ingression Rate	Schroeder Element Medium
20/18/15	High	Z25
19/17/14	Low	Z25
19/17/14	High	Z10
18/16/13	Low	Z10
18/16/13	High	Z5
15/13/10	Low	Z5
15/13/10	High	Z3
14/12/9	Low	Z3
14/12/9	High	Z1
13/12/9	Low	Z1

To obtain the desired cleanliness level (ISO Code) using the suggested Schroeder filter medium, it is recommended that a minimum of one-third of the total fluid volume in the system pass through the filter per minute. If fluid is filtered at a higher flow rate, better results may be achieved. If only a lesser flow rate can be filtered, a more efficient media will be required.

Systems operating in a clean environment, with efficient air-breather filters and effective cylinder rod wiper seals, may achieve the desired results at a lower turnover rate. Systems operating in a severe environment or under minimal maintenance conditions should have a higher turnover. Turnover must be considered when selecting the location of the system's filter(s).

Since the pressure drop versus flow data contained in our filter catalog is for fluids with a viscosity of 150 SUS (32.0 cSt), and a specific gravity of .86, we are often asked how to size a filter with a viscosity other than 150 SUS (32.0 cSt) or a specific gravity other than .86. In those instances where the viscosity or specific gravity is significantly higher, it may be necessary to use a larger element. To make this determination, we need to calculate the life of the element, using the following equation:

$$EL = RC - (H + E)$$

Where:

EL = Element Life (expressed in psi)　　　　H = Housing pressure drop

RC = Relief valve cracking pressure　　　　E = Element pressure drop

1. The housing pressure drop can be read directly from the graph. This value is not affected by viscosity or the number of elements in the housing, since housing flow is turbulent.

2. The element pressure drop is directly proportional to viscosity, since element flow is laminar.

Schroeder's "rule of thumb" for element life, as calculated from the above equation, is to work towards a differential pressure drop that is no more than half (50%) of the bypass setting.

The interval between element change outs can be extended by increasing the total filter element area. Many Schroeder filters can be furnished with one, two, or three elements or with larger elements. By selecting a filter with additional element area, the time between servicing can be extended for little additional cost.

Schroeder filters have been used successfully to filter a variety of fire resistant fluids for over five decades. Filtering these fluids requires careful attention to filter selection and application. Your fluid supplier should be the final source of information when using these fluids. The supplier should be consulted for recommendations regarding limits of operating conditions, material and seal compatibility, and other requirements peculiar to the fluid being used within the conditions specified by the fluid supplier.

High Water Content Fluids

High water content fluids consist primarily of two types: water and soluble mineral base oil, and water with soluble synthetic oil. The oil proportion is usually 5%, but may vary from as low as 2% to as high as 10%.

Standard Schroeder Z1, Z3, Z5, Z10, and Z25 elements are compatible with both types of high water content fluids. Filter sizing should be the same as with 150 SUS (32 cSt) mineral based hydraulic oil. Z1 and Z3 elements may be used; however, element change outs will be more frequent. Some special factors that need to be considered in the selection process include the following:

- All aluminum in the filter housing should be anodized. This can be accomplished by using the "W" adder as shown in the filter model number selection chart.

- When using 95/5 fluids, check with fluid supplier for compatibility with aluminum.

- Buna N or Viton® seals are recommended.

- The high specific gravity and low vapor pressure of these fluids create a potential for severe cavitation problems. Suction filters or strainers should not be used. The Schroeder Magnetic Separator (SKB), page 327, with its low pressure drop, is recommended for pump protection from ferrous or large particles.

Invert Emulsions

Invert emulsions consist of a mixture of petroleum based oil and water. Typical proportions are 60% oil to 40% water. Standard Schroeder filters with Z10 and Z25 media elements are satisfactory for use with these fluids. Filters should be sized conservatively for invert emulsions. These fluids are non-Newtonian—their viscosity is a function of shear. We recommend up to twice the normal element area be used as space and other conditions permit.

Some special factors that need to be considered in the selection process include the following:

■ Potential exists for cavitation problems with invert emulsions similar to high water based fluids. SKB suction separators are recommended for pump protection from ferrous or large particles.

■ Buna N or Viton® seals are recommended.

Water Glycols

Water glycols consist of a mixture of water, glycol, and various additives. Schroeder Z3, Z5, Z10 and Z25 elements are satisfactory for use with these fluids. Some special factors that need to be considered in the selection process include the following:

■ All aluminum in the filter should be anodized. This can be accomplished by using the "W" option as shown in the filter model number selection chart.

■ Potential exists for cavitation problems with water glycols similar to high water based fluids. SKB suction separators are recommended for pump protection from ferrous or large particles.

■ Buna N or Viton® seals are recommended.

Phosphate Esters

Phosphate esters are classified as synthetic fluids. All Schroeder filters and elements can be used with most of these fluids. Sizing should be the same as with mineral based oils of similar viscosity. Some special factors that need to be considered in the selection process include the following:

■ For phosphate esters, specify EPR seals (designated by "H" seal option) for all elements. As a general rule, all Z-Media® (synthetic) is compatible and 10 and 25 μ only E media (cellulose) with phosphate esters.

■ For Skydrol®, only 3, 5, 10, and 25 μ Z-Media® (synthetic) should be used, and "H.5" should be designated as the seal option. The "H.5" seal designation calls for EPR seals and stainless steel wire mesh in element construction.

Pressure Drop Correction for Specific Gravity

Pressure drop curves shown in this catalog are predicated on the use of petroleum based fluid with a specific gravity of 0.86. The various fire resistant fluids discussed in this section have a specific gravity higher than 0.86, which affects pressure drop. Use the following formula to compute the correct pressure drop for the higher specific gravity:

$$\text{Corrected pressure drop} = \frac{\text{Fluid specific gravity}}{0.86} \times \text{Catalog pressure drop}$$

Viton® is a registered trademark of DuPont Dow Elastomers.

Skydrol® is a registered trademark of Solutia Inc.

7 Steps to Selecting a Filter

In the new era, systems are getting smaller and more compact, causing flow rates in hydraulic reservoirs to decrease, as well as a tighter space for overall reservoir components.

Without a properly sized filter and element in your machine's reservoir, operators can experience occurrences such as: foaming, cavitation, shortened fluid lifespan, poor response time from hydraulic valves, increase in replacement filter elements, and more valve and pump repairs.

In this section, we will walk you through our **7 Steps for Choosing the Correct Filtration.**

<u>**Example Parameters:**</u> A piston pump and servo system with 20 gpm (76 L/min) pump flow, 30 gpm (144 L/min) return flow, 4000 psi (275 bar) system pressure, and a total system volume of 60 gallons (227 liters), with a non-pressurized reservoir. The fluid is 150 SUS.

Step 1: "Operating Pressures"

Determine the operating pressure of the system you are looking to apply filtration to.

Step 2: "Flow Rate"

Look at all of the characteristics of the fluid that is needing the filtration, including the flow rate.

Step 3: "MVP Components"

Determine what component is the most critical to your operation.

Step 4: "ISO Level"

Reference our chart on page 13 to determine the recommended ISO level of your MVP component (determined in Step 3). This will help you select what media type will help you achieve your cleanliness goal.

Step 5: "Fluid Type"

Ask yourself "what type of fluid is being filtered?" and "what is my main contamination type?" (Reference contamination types on page 16).

Step 6: "Temperature"

Determine the highest and lowest temperatures of your operating fluid.

Step 7: "Piecing It All Together"

Based on the previous steps, you can now take the information learned, calculate overall system differential pressure, and determine the right choice for filtration.

By following these simple steps, we can guarantee you will see cleaner fluid. In addition, all major hydraulic components should be working to expectation, last longer, and ultimately save you and your company money.

Filter Selection Considerations
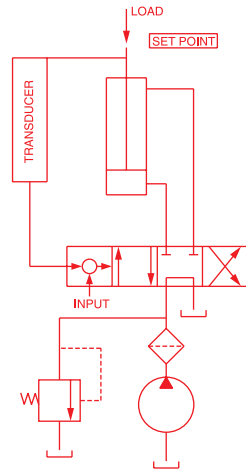
Filter Location
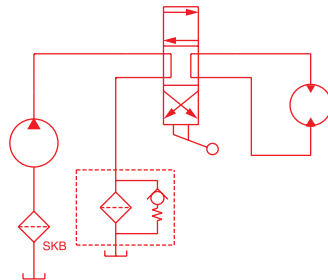

Figure 6(a). Pressure Filtration Circuit

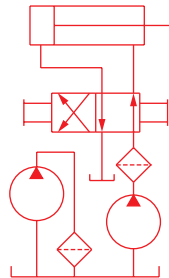**Figure 6(b). Return Line Filtration Circuit**

Figure 6(c). Re-circulating Filtration Circuit

Pressure filtration: Pressure filters usually produce the lowest system contamination levels to assure clean fluid for sensitive high-pressure components and provide protection of downstream components in the event of catastrophic failures. Systems with high intermittent return line flows may need only be sized to match the output of the pump, where the return line may require a much larger filter for the higher intermittent flows. See Figure 6(a).

Return line filtration: Return line filters are often considered when initial cost is a major concern. A special concern in applying return line filters is sizing for flow. Large rod cylinders and other components can cause return line flows to be much greater than pump output. Return lines can have substantial pressure surges, which need to be taken into consideration when selecting filters and their locations. See Figure 6(b).

Re-circulating filtration: While usually not recommended as a system's primary filtration (due to the high cost of obtaining adequate flow rates) re-circulating, or off-line, filtration is often used to supplement on-line filters when adequate turnover cannot be obtained with the latter. It is also often an ideal location in which to use a water removal filter. Off-line re-circulating filters normally do not provide adequate turnover flow rates to handle the high contamination loading occasioned by component failures and/or inefficient maintenance practices. See Figure 6(c).

Suction filtration: Micronic suction filters are not recommended for open-loop circuits. The cavitation these filters can cause significantly outweighs any advantage obtained by attempting to clean the fluid in this part of the system. SKB magnetic suction separators are recommended, as they will protect the pump from large and ferrous particles, without the risks of cavitation.

Breather filtration: Efficient filter breathers are required for effective contamination control on non-pressurized reservoirs and should complement the liquid filtration component.

Multiple filtration: For systems incorporating large total fluid volumes, it may be necessary to employ filters in more than one location. Multiple pressure filters, pressure and return line filters, and recirculating filters are examples of multiple filtration applications.
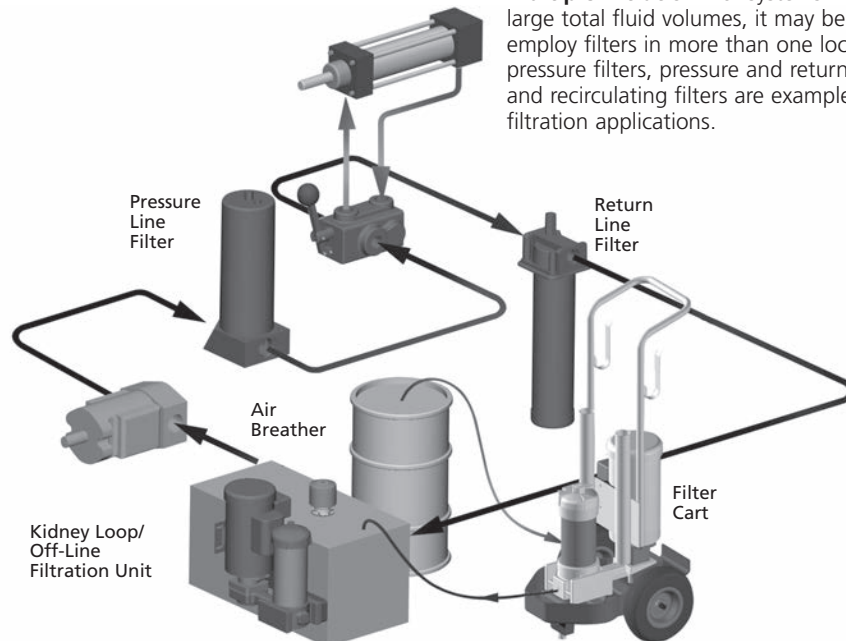
Parameters: A piston pump and servo system with 20 gpm (76 L/min) pump flow, 30 gpm (114 L/min) return flow, 4000 psi (275 bar) system pressure, and total system volume of 60 gallons (227 liters), with a non-pressurized reservoir.

Step 1 example. The servo valve is the system's most sensitive component. Referring to Figures 2 and 3 (page 13), you can see that a cleanliness level (ISO Code) of 16/14/11 or better is recommended for a high pressure system containing a servo valve.

Step 2 example. Table 8 recommends the Schroeder Z5 element media or finer to achieve a cleanliness level of 16/14/11.

Step 3 example. A combination of a pressure filter upstream of the servo valve and a return line filter would provide cost effective contamination control for servo systems.

Step 4 example. Filter model DF40, shown on page 65, is selected as the appropriate pressure filter because of its 30 gpm and 4000 psi capacities. A look at the Element Selection Chart for the DF40 located on page 67 verifies that the CZ5 element will handle 20 gpm, and the appropriate model number is DF40-1CZ5.

The ZT in-tank return line filter is selected for the 30 gpm return flow and the Z5 media. As shown in the model selection chart for the ZT on page 266, the proper model number to meet the specifications is ZT-8ZZ5.

Step 5 example. Using our Accessories Catalog; L-4329, select the ABF-3/10-S breather/strainer.

Step 6 example. Implement the appropriate manufacturing, assembly and maintenance contamination control procedures.

Step 7 example. Check start-up and ongoing system cleanliness (ISO Codes). Schroeder offers oil sampling kits that can be forwarded to a lab for particle counting and determination of cleanliness levels.

Table 8. Schroeder Element Media Recommendations

Desired Cleanliness Levels (ISO Code)	Schroeder Media
20/18/15-19/17/14	Z25
19/17/14-18/16/13	Z10
18/16/13-15/13/10	Z5
15/13/10-14/12/9	Z3
14/12/9-13/11/8	Z1

Rated Fatigue Pressure

The application of individual filters should take fatigue ratings into consideration when there are flow or pressure variations creating pressure peaks and shock loads.

Typical hydraulic systems that use highly repetitive operations include plastic injection molding machines, die-cast machines, and forging and stamping press systems. In these and other similar applications, rated fatigue pressure should be considered when selecting a filter.

It has been common practice in the fluid power industry to establish component ratings for maximum operating pressure based on the minimum yield pressure, which is usually one third of the minimum yield pressure for higher-pressure components and one fourth of the minimum yield pressure for lower-pressure components. This rating method has proved satisfactory for many years, but it does not directly address the subject of fatigue.

The National Fluid Power Association has introduced a method (NFPA T2.6.1) for verifying the fatigue pressure rating of the pressure-containing envelope of a metal fluid power component. In this method, components are cycled from 0 to test pressure for 1 million cycles (10 million cycles is optional). The rated fatigue pressure (RFP) is verified by testing. We establish the desired RFP from design, then we calculate the cycle testing pressure (CTP), and then conduct tests at CTP per 1,000,000 cycles.

The T2.6.1 Pressure Rating document is available from the National Fluid Power Association, 3333 N. Mayfair Road, Milwaukee, WI 53222-3219.

Table 9. Fatigue Pressure Ratings

Model	Rated Fatigue Pressure psi (bar)	Model	Rated Fatigue Pressure psi (bar)
NF30/NFS30	2400 (165)	LW60	5800 (400)
YF30	1800 (125)	ZT	90 (6)
DF40/CF40	1800 (125)	RT/LRT	90 (6)
PF40	2500 (173)	QT/IRF	100 (7)
LC50	5000 (350)	KF3	290 (20)
CFX30	1800 (125)	KL3	300 (20)
RF60	3500 (240)	TF1	270 (19)
CF60	4000 (276)	LF1/MLF1	250 (17)
VF60	3300 (230)	RLD	350 (24)
KF30	2500 (170)	RLT	750 (52)
TF50	3500 (240)	GH	725 (50)
KF50/KC50	3500 (240)	GHHF	725 (50)
KFH50	3500 (240)	SRLT	750 (52)
MKF50	3500 (240)	KF8/QF5/3QF5	500 (35)
KC65	5500 (380)	K9/2K9/3K9	750 (52)
NOF50-760	4000 (275)	QF15/QLF15/SSQLF15	800 (55)
FOF60/PF40	4000 (275)	HS60	6000 (415)
CTF60	6000 (415)		

Contact Factory For: RFS50, FOF30, NOF30-05, MTA, MTB, KT, BFT, PAF1, MAF1, MF2, RTI, KTK, LTK, QF5 and QFD5 Fatigue Ratings. All water service and GeoSeal® models match their standard model for Rated Fatigue Pressure.

Manifold Mounting

In some filtration applications, it is advantageous to have the inlet and outlet ports mount directly onto a block without any hydraulic hose in between. Schroeder offers several such manifold-mounted filter models, including NFS30, YF30, PF40, LC50 DF40, RFS50, KF30, TF50, KF50, KC50, and KFH50. Drawings for these porting options are labelled "Optional Subplate Porting" and are included on respective catalog pages.

No-Element Indicator

The No-Element Indicator is a unique, patented signaling device designed to alert the user if no filter element is present in the housing. This virtually eliminates any possible confusion on the part of the user that the filter contains an element and is functioning in a normal manner.

The tamper proof system utilizes a patented internal valve design. If the element is not installed in the housing, the valve restricts flow, causing a high pressure drop. The high pressure drop, in turn, causes the Schroeder Dirt Alarm® to indicate that the element is not installed in the housing.

The only way to deactivate the indicator is to install the element in the housing.

This feature is available in the following filter models: RT, TF1, KF3, CF40, DF40, CF60, TF50, KF30, KF50, KC50, KC65, and MKF50 that are equipped with a Schroeder Dirt Alarm®. No-element indicator is not available when the indicator is placed in the cap in base-ported filters.

Ordering Information

For each filter that is shown in Sections 3, 4, 5 , and 6 there is a Model Number Selection Chart. This chart lists all the configurations and accessories available for that specific filter.

Model numbers for all Schroeder filters are formulated by listing the appropriate codes, from left to right, according to the designated boxes shown in the chart. The letter or letter/number combination identifies the basic filter series. For instance, as shown in Figure 7, KF303KZ10PD5 designates a KF30 high-pressure, base-ported filter with three synthetic 3 μ elements, Buna N seals, 1½" NPTF porting, and a visual cartridge Dirt Alarm®.

Figure 7. Model Number Selection

How to Build a Valid Model Number for a Schroeder KF30:

BOX 1	BOX 2	BOX 3	BOX 4	BOX 5	BOX 6	BOX 7	BOX 8	BOX 9	BOX 10
KF30									

Example: *NOTE: Only boxes 8 and 10 may contain more than one option*

BOX 1	BOX 2	BOX 3	BOX 4	BOX 5	BOX 6	BOX 7	BOX 8	BOX 9	BOX 10	
KF30	3K	Z	10			P		D5		= KF303KZ10PD5

BOX 1

Filter Series
KF30
KFN30 (Non-bypassing: requires ZX high collapse elements)
GKF30 (GeoSeal®)
KF50
KFN50 (Non-bypassing: requires ZX high collapse elements)
GKF50 (GeoSeal®)

BOX 2

Number & Size of Elements

1	= K, KK, 27K
2	= K
3	= K

GeoSeal® Options

1	= KG, KKG, 27KKG
2	= KG
3	= KG

BOX 3

Media Type

Omit =	E Media (Cellulose)
AS =	Anti-Stat Media (synthetic)
Z =	Excellement® Z-Media® (synthetic)
ZW =	Aqua-Excellement® ZW Media
ZX =	Excellement® Z-Media® (High Collapse centertube)
W =	W Media (water removal)
M =	Media (reusable metal mesh) N size only

BOX 4

Micron Rating

1	= 1 Micron	(Z, ZW, ZX media)
3	= 3 Micron	(AS,E, Z, ZW, ZX media)
5	= 5 Micron	(AS, Z, ZW, ZX media)
10	= 10 Micron	(AS,E,M, Z, ZW, ZX media)
25	= 25 Micron	(E, M, Z, ZW, ZX media)
60	= 60 Micron	(M media)
150	= 150 Micron	(M media)
260	= 260 Micron	(M media)

BOX 5

Seal Material

Omit =	Buna N
V =	Viton®
H =	EPR
H.5 =	Skydrol® compatibility

BOX 6

Magnet Option

Omit =	None
M =	Magnet inserts (not available w/ indicator in cap)

BOX 7

Porting

P =	1 ½" NPTF
P32 =	2" NPTF
S =	SAE-24
F =	1 ½" SAE 4-bolt flange Code 61
F32 =	2" SAE 4-bolt flange Code 61(KF30) *KF30 Only
O =	Subplate
B24 =	ISO 228 G-1 ½"

BOX 8

Options

Omit =	None
X =	Blocked bypass
50 =	50 psi bypass setting
L =	Two ¼" NPTF inlet & outlet female test ports
U =	Series 1215 7⁄16 UNF Schroeder Check Test Point installed in cap (upstream)
UU =	Series 1215 7⁄16 UNF Schroeder Check Test Point installed in block (upstream and downstream)

BOX 9

Dirt Alarm® Options

	Omit =	None
Visual	D =	Pointer
	D5 =	Visual pop-up
	D5C =	D5 in cap
	D9 =	All stainless D5
Visual with Thermal Lockout	D8 =	Visual w/ thermal lockout
	D8C =	D8 in cap
Electrical	MS5 =	Electrical w/ 12 in. 18 gauge 4-conductor cable
	MS5LC =	Low current MS5
	MS10 =	Electrical w/ DIN connector (male end only)
	MS10LC =	Low current MS10
	MS11 =	Electrical w/ 12 ft. 4-conductor wire
	MS12 =	Electrical w/ 5 pin Brad Harrison connector (male end only)
	MS12LC =	Low current MS12
	MS16 =	Electrical w/ weather-packed sealed connector
	MS16LC =	Low current MS16
	MS17LC =	Electrical w/ 4 pin Brad Harrison male connector
Electrical with Thermal Lockout	MS5T =	MS5 (see above) w/ thermal lockout
	MS5LCT =	Low current MS5T
	MS10T =	MS10 (see above) w/ thermal lockout
	MS10LCT =	Low current MS10T
	MS12T =	MS12 (see above) w/ thermal lockout
	MS12LCT =	Low current MS12T
	MS16T =	MS16 (see above) w/ thermal lockout
	MS16LCT =	Low current MS16T
	MS17LCT =	Low current MS17T
Electrical Visual	MS =	Cam operated switch w/ ½ " conduit female connection
	MS13DC =	Supplied w/ threaded connector & light
	MS14DC =	Supplied w/ 5 pin Brad Harrison connector & light (male end)
Electrical Visual with Thermal Lockout	MS13DCT =	MS13 (see above), direct current, w/ thermal lockout
	MS13DCLCT =	Low current MS13DCT
	MS14DCT =	MS14 (see above), direct current, w/ thermal lockout
	MS14DCLCT =	Low current MS14DCT

BOX 10

Additional Options

Omit =	None
N =	No-Element Indicator (not available w/ KFN30/KFN50/ GKF30/GKF50 or housings w/ indicator in cap)
G509 =	Dirt Alarm and drain opposite standard
G588 =	Electric Switch and drain opposite standard

NOTES:

Box 2. Number of elements must equal 1 when using KK or 27K elements. Replacement element part numbers are identical to contents of Boxes 2, 3, 4 and 5. Double and triple stacking of K-size elements can be replaced by single KK and 27K elements, respectively. ZW media not available in 27K length.

Box 5. H.5 seal designation includes the following: EPR seals, stainless steel wire mesh on elements, and light oil coating on housing exterior. Viton® is a registered trademark of DuPont Dow Elastomers. Skydrol® is a registered trademark of Solutia Inc.

Box 7. For options F & F32, bolt depth .75" (19 mm).

For option O, O-rings included; hardware not included.

Box 8. X and 50 options are not available with KFN30.

Box 9. Standard indicator setting for non-bypassing model is 50 psi unless otherwise specified.

Box 10. Options N, G509 and G588 are not available with KFN30. N option should be used in conjunction with dirt alarm.

Element Selection Chart for Flow Requirements

For each filter shown in the catalog, there is an element selection chart to determine the correct element to be used for a particular flow requirement (see Figure 8 for an example). The chart uses a petroleum-based hydraulic fluid with 150 SUS viscosity.

The process involves the following: Determine the working pressure of the system (3000 psi in this example) and the maximum flow (75 gpm). Then select the media (Z-Media®), and the micron filtration (3 µ). For example, the filter selected, following the above steps, is a KF30-3KZ3-P-D5. If the system pressure is 5000 psi and all other parameters are the same, then the model number would be KF50-3KZ3-P-D5.

Figure 8. KF30 Housing and Element Selection Chart for Flow Requirement

Pressure	Element Series	Element Part No.	Element selections are predicated on the use of 150 SUS (32 cSt) petroleum based fluid and a 40 psi (2.8 bar) bypass valve.					
To 3000 psi (210 bar)	E Media	K3	1K3		2K3		3K3	See MFK50
		K10	1K10		2K10		3K10	3K10 See MFK50
		K25	1K25					2K25
	Z Media	KZ1	1KZ1			2KZ1		3KZ1
		KZ3	1KZ3				2KZ3	3KZ3
		KZ5	1KZ5				2KZ5	3KZ5
		KZ10	1KZ10				2KZ10	3K10
		KZ25	2KZ25					2KZ25
	Flow	gpm	0 25 50 75 100 125 150					
		(L/min)	0 100 200 300 400 500 600					

Shown above are the elements most commonly used in this housing.   **requires 2" porting (P32)**

Correcting for Viscosity and Specific Gravity

Element pressure drop information in this publication is based on the viscosity (150 SUS or 32 cSt) and specific gravity (0.86) of the most commonly used hydraulic oils.

If the viscosity or specific gravity of the fluid you are designing for is different from these, use the following formulas to obtain the correct ΔP values.

$$\text{Corrected element } \Delta P = \Delta P \text{ from curve} \times \frac{\text{SUS viscosity}}{150} \times \frac{\text{specific gravity}}{0.86}$$

OR

$$\text{Corrected element } \Delta P = \Delta P \text{ from curve} \times \frac{\text{cST viscosity}}{32} \times \frac{\text{specific gravity}}{0.86}$$