Engine Oil Licensing and Certification System (EOLCS) Online System
User Guide

- Managing Contact and Company Information
  - Contact Registration
  - Company Registration
  - Add Contacts To Company
  - Password Reset
  - Edit Contact Information
  - Edit Company Information
- New Product
- New Formulation
- Submitting and Responding To A Formulation Request
  - Submitting Formulation Request (Marketer)
  - Responding To Formulation Request (Supplier)
  - Receiving A Response To Formulation Request (And Submitting To API For Review)
- Associating Formulations To A Product
  - Associating An Existing Formulation
  - Associating A New Formulation
  - Associating A Formulation From A Supplier
- Application Fee Invoice/Payment (New Company)
- License Renewal
- AMAP (Audits)
- Product and Formulation Statuses
  - Product Statuses
  - Formulation Statuses
Engine Oil Licensing and Certification System (EOLCS) Online System User Guide

Managing Contact and Company Information
Contact Registration

A user must register in the system before they can create a new company or be added to an existing company’s contact list.
After registering your email, you will be required to verify your email address. A verification email will be sent to the email address used to register. If you do not receive the email within 24 hours, to return to the Email Sent page and resend the verification email.

Example of verification email:

Date: 5/25/2017 10:03:46 AM
To: myAPI@EOLCSTest.com
Subject: myAPI - User Registration - Confirm Email

Body: Your account has been successfully registered in myAPI. You must confirm your email address before logging in. Please confirm your email address by visiting the following link:
http://dev-hq-my.ecrts.api.dev/myAPIDevlAccountConfirmEmailAndSelectPassword?email=EOLCS%40Test.com&gvid=392c6b07-0241-e711-80e7-005056b516a5
Once you've verified your email address you will be able to, create a password, log on to the system, create a personal profile and either add a new company or have the primary contact from an existing company add you to the company contact list.
Contact and Company Information

https://my.api.org
Company Registration

DO NOT create a company account if your company is already registered in the system. If your company has an active EOLCS license, a company account already exists.

The public directory (https://engineoil.api.org/Directory/EolcsSearch) provides a list of active EOLCS licensed companies. If you are not sure if your company is already registered please contact the EOLCS helpdesk at teameolcs@api.org for assistance.
Contact and Company Information

https://my.api.org
Additional Company Registration
Add Contacts to Company

The Company Info page is the first page you will be directed to when you register a new company or log into your existing company account.
Contact and Company Information

https://my.api.org
Password Reset

Start here or here
Reminder: Passwords must be at least 8 characters long and contain at least one letter, one number and one special character.
Edit Contact Information

In the Person Information section you can update contact information.

Start here or here
Contact and Company Information

**Edit:**

![Contact Information Form](image1)

**Save:**

![Company Information Form](image2)
Edit Company Information

Contact and Company Information

https://my.api.org
Engine Oil Licensing and Certification System (EOLCS) Online System User Guide

New Product
Adding A New Product

There are two places where you can go to enter a new product: the Company Info page and your company’s Products tab.

Start here or here
Once you create a product, you cannot change the brand name, viscosity grade, or service categories. If you discover minor typos in the brand name, contact the EOLCS helpdesk and API will make corrections on your behalf.

DO NOT use registered words or phrases, viscosity grades, or API service categories in our product brand name.

Depending on the service category(s) chosen, the system may provide you with options for eligible designations.

A product packaging type must be chosen for all new products. When you choose 'Packaged' or 'Bulk and Packaged', you will be required to associate a traceability code.
Engine Oil Licensing and Certification System (EOLCS) Application – User Guide

New Product

https://engineoil.api.org
New Product
You have now added a new product. A formulation must be associated with the product before you can submit to API for approval. Until a formulation is associated and the product is submitted, the product can be found in the ‘New’ status on your Products tab and will be listed under ‘New (unfinished) Products:’ on the Action Item list on your Company Info page.

From the Product Detail page you can:
- Associate already existing formulations to the product
- Add a new formulation
- Send a formulation request to a supplier
- Edit your product packaging

Please see user guide for Associating Formulations to A Product.
Engine Oil Licensing and Certification System (EOLCS) Online System User Guide

New Formulation
Adding A New Formulation

There are two places where you can go to enter a new formulation: the Company Info page and your company’s Formulations tab.
Adding a new formulation requires completing three pages of information: Formulation Information, Elements and Properties, and Additives and Testing.

Page 1: Formulation Information

Depending on the service category(s) chosen, the system may provide you with options for eligible designations.
Page 2: Elements and Properties

All properties marked with an asterisk (*) are required. All fields have a range that we expect your value to fall within. If your value is not within the expected range for a required field you will receive the following error:

The value entered does not fall within expected range. Please correct or contact API.

If your value is not within the expected range for a non-required field you will receive the following warning:

Validate that the entered value is correct before proceeding.

If you do not complete a required field or receive a red error you will not be able to continue to the next step.
Page 3: Additives and Testing

The information on this page is proprietary and requires additional levels of security. Consequently, API cannot at this time allow licensees to access the data once submitted. Once ‘Save and Finish’ is chosen, this information will be put into a secure system and will only be viewable by API staff. If you need to retain a copy, use the ‘Print’ button at the bottom of the page. This will allow you to print or save a copy of the entire formulation before submission.
Completed formulations will be listed under the Active status on your company’s Formulation tab and will be available for use on products.
Engine Oil Licensing and Certification System (EOLCS) Online System User Guide

Submitting & Responding To A Formulation Request
Submitting A Formulation Request (Marketer)

Once you enter a complete product, you will have the option to submit a Formulation Request to a supplier or multiple suppliers. This will allow a supplier to provide you with a formulation, which can then be associated with your product and submitted to API for review. In order to submit a Formulation Request you will need to know your supplier’s 5-digit Company ID number, this number can be found on the Company Info page.

A Formulation Request can be sent from the Product Detail page.
There are two pieces of required information on the Formulation Request: Formulation Request Details and your supplier's Company ID.
Responding To Formulation Request (Supplier)

When a marketer sends your company a formulation request, you will be notified with an email and the request will appear on your Company Info page and on your company’s Formulations tab.
Formulations that have been previously added will appear as options to supply for a marketing company’s formulation request if the formulation is a 100% match for the product on the following criteria:

- Viscosity Grade
- Service Category(s)
- Designations
All received formulation requests can be viewed on your company’s Formulation tab. Once you have supplied a formulation, the formulation request status will change from ‘Pending’ to ‘Approved’.
Receiving A Response To Formulation Request (Marketer)

Once a supplier company provides a formulation in response to a formulation request you will be notified with an email and on your company’s Formulations tab, these formulation requests will now be listed under the ‘Approved’ status.

Clicking on the product brand name will allow you to view the details of the formulation request, including any comments from the supplier company and the formulation(s) that they have provided.
From the Formulation Request, clicking on ‘View Product Detail’ will take you to your Product Detail page where you can associate the supplier provided formulations with your product and submit to API for review (see Associating Formulations To A Product).
Engine Oil Licensing and Certification System (EOLCS) Online System User Guide

Associating Formulations To A Product
After adding a new product, you will be taken to the Product Detail page. You can also get to this page by clicking on the product brand name in the Products tab. New products that do not have any associated formulations will be in the ‘New’ status and will be listed on the Action Item list on the Company Info page under ‘New (unfinished) Products’.

From the Product Detail page you can associate existing formulations, new formulations, and/or supplier provided formulations to the product and submit to API for review.

Formulations can be associated to any products in any status except for Canceled For Non-Response and Canceled For Cause. For products in the Withdrawn status: if a formulation is associated and submitted to API for review, the product will move to the ‘Submitted’ status and if approved the product will become active.
Associating An Existing Formulation

Formulations that have been previously added will appear as options to associate with this product if the formulation is a 100% match for the product on the following criteria:

- Viscosity Grade
- Service Category(s)
- Designations

Any formulations that are eligible for use on the product will appear in the Available Formulations list.

To associate and submit to API for review click ‘Add’, check the terms and conditions and click ‘Submit’.
Associating A New Formulation

Clicking on ‘Add A New Formulation’ will take you to the first page of the three-step process for adding a new formulation (see the Add New Formulation user guide).
After adding a new formulation, you will be brought back to the Product Detail page where the formulation you added will be listed under the Available Formulations.

To associate and submit to API for review click ‘Add’, check the terms and conditions and click ‘Submit’.
Associating A Formulation From A Supplier

When your supplier provides a formulation for use on your product, on the Product Detail page you will see the supplier submitted formulation under the Available Formulations. For instructions on how to submit a formulation request see Submitting & Responding To A Formulation Request.

To associate and submit to API for review click ‘Add’, check the terms and conditions and click ‘Submit’.
Engine Oil Licensing and Certification System (EOLCS) Online System User Guide

Application Fee – Invoice/Payment
New Company
Application Fee Invoice/Payment

In order to ensure program eligibility, any company wishing to be EOLCS licensed must register in the online system and complete at least one product. After you submit the first product to API for review, you will be taken to the Legal Agreement page.

An electronic signature is required on the Legal Agreement. Please type your name exactly as it appears in the system.

If you are signing on behalf of someone, you will be required to provide an email address for that person and they will be sent a notification.

After signing the Legal Agreement, you will begin the process of generating and submitting payment information for the application fee.
All new applicants are required to pay an application fee before API can review their products and formulations. Current application fees can be found here.

Any of the information on this page can be changed as necessary in order to facilitate payment.
From this page you can print an official invoice (example on next page) and submit your payment information. If you do not have the payment information at the time the invoice is generated, you can leave this page and come back to it when you have the necessary information. However, payment information **must** be completed in order for API to identify your payment when it is received and apply it to the correct invoice.

The two available payment methods are Bank Wire and Check. You will be required to submit information specific to the payment method chosen.
Payment Status: Payment Pending

Sample Invoice

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company ID: 11614</td>
<td></td>
</tr>
<tr>
<td>Payment #: 866125</td>
<td></td>
</tr>
</tbody>
</table>

If you are paying by bank wire transfer or A.C.H., you MUST have your bank include the invoice # on the top of the wire transfer. Thank you.

Send Checks By Mail To: American Petroleum Institute

Send Checks By Courier Services To: American Petroleum Institute

Send Wire Transfers To: TD Bank

Send Correspondence To: EOLCS Program

American Petroleum Institute
1220 L Street NW
Washington, D.C. 20005-4070
USA
Email: EOLCS@api.org

Instructions for sending payment through check and wire transfer will be available on actual invoice.
You will be able to review your company’s order history and previously signed legal agreements at any time on the Company Info page.
After your application fee is received, API will review your products. If any of your products are approved, you company will be licensed, you will be assigned a license number and your company will appear on the online public directory of licensees.
Engine Oil Licensing and Certification System (EOLCS) Online System User Guide

License Renewal
EOLCS licensees are required to renew their licenses on an annual basis. Below are the key points regarding EOLCS renewals:

- All licenses now have an expiration date of March 31\textsuperscript{st}. Each year you must renew your license by March 31\textsuperscript{st} or your license will expire and no longer be listed on the public directory of licensees.

- You will be required to renew through the online system.

- All licensees will be required to sign a legal agreement each year prior to renewal.
- You will be asked to report the amount of API licensed motor oil sold (volume of sales) for the last full calendar year. The calendar year is defined as the one-year period that begins on January 1 and ends on December 31.

- Once volume is reported, an invoice will be generated for the annual renewal fee and the volume of sales fee per gallon for every gallon after the first million. Those reporting less than 1 million gallons of license oil will only be invoiced for the annual renewal fee. Current EOLCS Renewal fees can be found here.
Renewing A License

The option to renew will be available to all licensees beginning January 1.

An electronic signature is required on the Legal Agreement. Please type your name exactly as it appears in the system.

If you are signing on behalf of someone, you will be required to provide an email address for that person and they will be sent a notification.
After completing the legal agreement you will be taken to the Invoice Information page where you will be asked to report your volume of sales for the previous calendar year.
From this page you can print an official invoice (example on next page) and submit your payment information. If you do not have the payment information at the time the invoice is generated you can leave this page and come back to it when you have the necessary information. However, payment information **must** be completed in order for API to identify your payment when it is received and apply it to the correct invoice.
Instructions for sending payment through check and wire transfer will be available on actual invoice.
You will be able to review your company’s order history and previously signed legal agreements at any time on the Company Info page.

Once your company’s renewal fee is received your expiration date will automatically update. Additionally, from your Company Info page you will be able to print a copy of your company’s updated EOLCS certificate.
Example certificate:

![Sample Certificate](image-url)
Engine Oil Licensing and Certification System (EOLCS) Online System User Guide

After Market Audit Program (AMAP)
Audit Role

The Audit role allows contacts to view results of audits performed on the company’s products. These contacts will: receive audit notifications, have access to the ‘Audits’ tab when logged into the EOLCS online system, and view audit related action items on the Company Info screen. There are three options for assigning contact roles:

<table>
<thead>
<tr>
<th>Role</th>
<th>Manage License Information</th>
<th>Add/Manage Contacts</th>
<th>View/Respond to Audits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Contact</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Account Manager (with Audit Manager option)</td>
<td>✓</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>Account Manager</td>
<td>✓</td>
<td>✗</td>
<td>✗</td>
</tr>
</tbody>
</table>

Adding a Contact and Assigning Roles:

![EOLCS Test Company](image-url)
### Action Items
Currently there are no action items. Please select an action to proceed.

#### Company Information
- **Certificate Company Name**: EOLCS Text
- **Company Legal Name**: EOLCS Text
- **Company Id**: 11499
- **Address**: 1200 L ST NW, WASHINGTON DC
- **Website**: www.api.org
- **License Status**: Active
- **License Number**: 3044
- **Original License Issue Date**: 13-Sep-2014
- **License Effective Date**: 13-Sep-2014
- **License Expiration Date**: 31-Mar-2015

#### Contact List
<table>
<thead>
<tr>
<th>Primary</th>
<th>Audit</th>
<th>Full Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Jane Doe</td>
</tr>
</tbody>
</table>

#### Add Contact
To add an existing Engine Oil contact to your account enter their full email address here (exact match required). If added as a Primary Contact that person can also add other contacts to the account.

**User Name**: eolcs@api.org
**First Name**: Jane
**Last Name**: Doe

**Manager Type**:
- Primary Account Manager
- Account Manager
- Audit Manager

Add
Quick Tests

API performs quick tests on engine oil drawn from bulk tanks (for example, those found in oil-change locations and auto dealerships). These results are conducted by API and provided to licensees as an initial assessment of the quality of a bulk product sampled. API reviews the quick test results but does not take action against nonconformances until final audit tests have been completed and evaluated. However, licensees should take a moment to review the quick test results and consider taking action if they fall well outside expected parameters for the product tested.

When Quick Test results are available, company contacts assigned to the audit role will receive an email notification and a notification within the system. Both will include a link to the Quick Test results.

Quick Test Notification:
Example of Quick Test Results:

<table>
<thead>
<tr>
<th>Test</th>
<th>Method</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viscosity @ 10°C - ASTM D468</td>
<td>ASTM D468</td>
<td>8.0</td>
</tr>
<tr>
<td>Zn/Co</td>
<td>ASTM D469</td>
<td>0.064</td>
</tr>
<tr>
<td>Calcium, Ca</td>
<td>ASTM D469</td>
<td>0.210</td>
</tr>
<tr>
<td>Magnesium, Mg</td>
<td>ASTM D469</td>
<td>0.011</td>
</tr>
<tr>
<td>Sodium, Na</td>
<td>ASTM D469</td>
<td>0.001</td>
</tr>
<tr>
<td>Titanium, Ti</td>
<td>ASTM D469</td>
<td>0.073</td>
</tr>
<tr>
<td>Boron, B</td>
<td>ASTM D469</td>
<td>0.000</td>
</tr>
<tr>
<td>Sulfur, Sulfides</td>
<td>ASTM D469</td>
<td>0.002</td>
</tr>
<tr>
<td>Phosphorus, P</td>
<td>ASTM D469</td>
<td>0.073</td>
</tr>
<tr>
<td>Aluminum, Al</td>
<td>ASTM D469</td>
<td>0.007</td>
</tr>
<tr>
<td>Copper, Cu</td>
<td>ASTM D469</td>
<td>0.001</td>
</tr>
<tr>
<td>Silicon, Si</td>
<td>ASTM D469</td>
<td>0.001</td>
</tr>
<tr>
<td>Silicon, Si</td>
<td>ASTM D469</td>
<td>0.001</td>
</tr>
<tr>
<td>Calcium, Ca</td>
<td>ASTM D469</td>
<td>0.001</td>
</tr>
<tr>
<td>Chromium, Cr</td>
<td>ASTM D469</td>
<td>0.001</td>
</tr>
<tr>
<td>Iron, Fe</td>
<td>ASTM D469</td>
<td>0.001</td>
</tr>
<tr>
<td>Potassium, K</td>
<td>ASTM D469</td>
<td>0.001</td>
</tr>
<tr>
<td>Manganese, Mn</td>
<td>ASTM D469</td>
<td>0.001</td>
</tr>
<tr>
<td>Nickel, Ni</td>
<td>ASTM D469</td>
<td>0.001</td>
</tr>
<tr>
<td>Lead, Pb</td>
<td>ASTM D469</td>
<td>0.001</td>
</tr>
<tr>
<td>Antimony, Sb</td>
<td>ASTM D469</td>
<td>0.001</td>
</tr>
<tr>
<td>Ti, Ti</td>
<td>ASTM D469</td>
<td>0.001</td>
</tr>
<tr>
<td>Vanadium, V</td>
<td>ASTM D469</td>
<td>0.001</td>
</tr>
<tr>
<td>Viscosity @ 40°C - ASTM D468</td>
<td>ASTM D468</td>
<td>10.1</td>
</tr>
<tr>
<td>Visc. Index - ASTM D2795</td>
<td>ASTM D2795</td>
<td>10.1</td>
</tr>
<tr>
<td>Lithium, Li</td>
<td>ASTM D2795</td>
<td>0.001</td>
</tr>
</tbody>
</table>
Audit Findings

When an audit is performed on a product and findings are discovered, the company is required to review and respond to the findings within a certain time period (varies depending on the severity of the findings). Company contacts assigned to the audit role will receive an email notification and there will be an action item created on the Company Info page.
Collection Company Results:

On the Audit page, the Collection Company Results section can be expanded to provide additional information regarding the product sample that was audited. This includes information such as where and when the product was collected. For packaged product, this section will also include information regarding the certification symbol(s) and traceability code(s). The ‘Collection Files’ section will also include links to images associated with the audit, such as receipts, collection forms and label images (for packaged products).
Responding to Findings:

Each finding must be responded to individually. Under each finding there is a text box available for a written response and there is also an option to upload files. Once all findings have been responded to, the audit status will change to Findings Responded and the responses will be sent to API for review. If the responses resolve all the findings, the audit will be closed, if not the findings will be returned for further information.

If audit findings are not responded to within the specified time period, the product will be Canceled for Non-Response. When a product has been canceled, the product will be listed as Canceled on the public directory and the licensee will no longer be able to claim EOLCS certification on that product.
Complete Audit

An audit will be put into the Complete status if no findings are found or all findings are resolved by the licensee. When an audit is completed, company contacts assigned to the audit role will receive a notification and the audit will be available to view in the company’s Audits tab.
Engine Oil Licensing and Certification System (EOLCS) Online System User Guide

Product and Formulation Statuses
# Product Statuses

<table>
<thead>
<tr>
<th>Status Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>Approved by API and listed on the licensee directory.</td>
</tr>
<tr>
<td>Approved – Formulation Added</td>
<td>New formulation is added to an Approved product and submitted to API for review.</td>
</tr>
<tr>
<td>Approved – Technical Review</td>
<td>A new formulation that was added to an Approved product is in API technical review.</td>
</tr>
<tr>
<td>New</td>
<td>Incomplete product that has not been submitted to API for review. These products will be listed on the Action Item list on the Company Info page under ‘New (unfinished) Products’.</td>
</tr>
<tr>
<td>Payment Pending</td>
<td>Product submitted for an unlicensed company that API has not received an application fee from. Products will not be reviewed for new applicant companies until the application fee invoice has been paid.</td>
</tr>
<tr>
<td>Submitted</td>
<td>Complete product that has been submitted to API for review.</td>
</tr>
<tr>
<td>Response Required</td>
<td>API requires a response to a specific question about the product and/or associated formulation. API's question(s) can be found on the Product Detail page where you have the ability to submit a response. These requests will be listed on the Action Item list on the Company Info page under ‘Response Required’.</td>
</tr>
<tr>
<td>Responded</td>
<td>Response to API inquiry has been submitted and is pending review.</td>
</tr>
<tr>
<td>Technical Review</td>
<td>API is more closely reviewing the product’s associated formulation(s). These products may require additional time to review.</td>
</tr>
<tr>
<td>Rebranded</td>
<td>Product has been rebranded and submitted to API and is pending review.</td>
</tr>
<tr>
<td>Canceled For Non-Response</td>
<td>Canceled by API for audit nonconformance(s) that were not addressed.</td>
</tr>
<tr>
<td>Canceled For Cause</td>
<td>Canceled by API for severe audit failure.</td>
</tr>
<tr>
<td>Withdrawn</td>
<td>Product was either voluntarily withdrawn or the only associated formulation was inactivated. These products can be reactivated by associating a formulation and submitted to API for review.</td>
</tr>
</tbody>
</table>
## Formulation Statuses

<table>
<thead>
<tr>
<th>Status Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>Complete formulation that can be associated with products.</td>
</tr>
<tr>
<td>Inactive</td>
<td>Voluntarily withdrawn or denied by API during product review. If formulation was inactivated because of API denial, reason for denial will be provided on the Formulation Detail page. Inactive formulations cannot be associated with products.</td>
</tr>
<tr>
<td>New</td>
<td>Incomplete formulation. These formulations will be listed on the Action Item list on the Company Info page under ‘New (unfinished) Formulations’.</td>
</tr>
<tr>
<td>Canceled</td>
<td>Canceled by API for audit failure.</td>
</tr>
</tbody>
</table>

## Requests Received
(formulation requests received from marketing companies)

<table>
<thead>
<tr>
<th>Status Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>Pending review from your company.</td>
</tr>
<tr>
<td>Approved</td>
<td>Your company has approved and provided a formulation for.</td>
</tr>
<tr>
<td>Denied</td>
<td>Your company has denied. Any formulation requests from companies you do not recognize should be denied and reported to API.</td>
</tr>
<tr>
<td>Revoked</td>
<td>Request your company originally approved but then revoked.</td>
</tr>
</tbody>
</table>

## Requests Sent
(formulation requests sent to supplier companies)

<table>
<thead>
<tr>
<th>Status Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>Your company sent and is still waiting for action from the supplier.</td>
</tr>
<tr>
<td>Approved</td>
<td>Supplier company approved and proved a formulation for.</td>
</tr>
<tr>
<td>Denied</td>
<td>Denied by your supplier company. For questions regarding why your request was denied please contact your supplier directly.</td>
</tr>
<tr>
<td>Revoked</td>
<td>Request supplier originally approved but then revoked.</td>
</tr>
</tbody>
</table>