

## **EDUCATION RECOMMENDATIONS**



★ **HYDRAULICS PROGRAMME MH2**  
**CETOP Passport Occupational Level 2**



# MOBILE HYDRAULICS & ASSOCIATED CONTROL PROGRAMME (MH2): RE 2015/06.01 - H CETOP (Passport) Occupational Level 2

## INTRODUCTION

This is a LEVEL 2 Hydraulics Programme, forming the start of a series of competence-based qualifications designed around CETOP occupational levels.

It combines the necessary knowledge and competence based skills for those people on route to a higher level qualification at level 3, involving the maintenance and management of both Industrial and Mobile hydraulic systems.

*Note: In all cases, each programme represents a "stand-alone" qualification but can also be a progressive route to a higher level.*

## CETOP OCCUPATIONAL LEVEL 2

**LEVEL (2)** This person will perform a variety of activities needing some understanding of the technical factors involved. The activities may require the interpretation and application of varied and non-routine specifications. Activities will involve the use of simple diagnostic checks and ability to make a positive response to deviations. Co-operation with others in team or work groups may be required.

Throughout the programme, emphasis is placed upon the development of knowledge relating to "FUNCTION", "OPERATION" and "APPLICATION". The knowledge based section will support the development and effective application of practical skills necessary to carry out in a safe and effective manner:

- INSTALLATION
- COMMISSIONING
- PERFORMANCE TESTING

- PROACTIVE MAINTENANCE AND MACHINE MANAGEMENT
- SERVICING
- COMPONENT REMOVAL AND REPLACEMENT

The development of planning and preparatory skills, the use of technical information and specifications and the formulation and implementation of safe working procedures will be emphasized throughout all aspects of this programme.

## METHODOLOGY AND ASSESSMENT

The programme can be offered via a range of learning modes devised by the Approved Centres ranging from that of short courses to distance learning and centre based modules. The time scale can also be flexibly managed by the Approved Centres.

Candidates will be expected to complete a series of assignments throughout the programme of study to reinforce the learning process and attend the programme of centre based modules.

Final assessment for the knowledge-based units will be via a written examination with a minimum of 2 hours duration. The pass mark for the written examination will be 60%.

The expected completion time for this competence based programme is 1-2 years but this does depend upon previous experience and the learning mode devised by the centre and will require a high level of personal commitment to study and research the subjects within the syllabus.

Successful completion of both the knowledge based and competence-based units will result in the award of a CETOP Level 2 Mobile Hydraulics Qualification Certificate. (Candidates successfully completing only one unit might receive a CETOP Unit Certificate).

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### **PRACTICAL TASK ASSESSMENT (MH2)**

When assessing competence, the following processes must be followed:

- Relating to the occupational level, a series of Assessed Abilities are identified. These represent the "DOING PART" of a person's job and requires a combination of both practical skills and applied knowledge.
- For each Assessed Ability, evidence of performance is then established and shown as EVIDENCE REQUIRED (sometimes termed performance criteria).

Practical task assessments to verify competency against the agreed performance criteria will be carried out at the approved centre during the education programme period. It could be arranged on one to one base or in groups, candidate/ candidates to tutor.

During practical task assessment, the ASSESSOR will agree the "type of evidence" to be obtained and this can range from:

- Direct Observation
  - Verbal Questioning/Candidate Commentary
  - Written Report
- and may include all types.

### **Assessment Requirements**

In practical tasks, candidates must on at least two occasions, prove their ability to carry out the following:

#### **Assessed Ability**

- MH2.1 Interpret hydraulic circuit diagrams applicable to selected systems.

#### **Evidence Required**

- MH2.1.1 Machine function and operation correctly identified.  
 MH2.1.2 Components named and function identified.  
 MH2.1.3 Component control methods identified.

#### **Assessed Ability**

- MH2.2 Assemble a hydraulic system from given information and carry out effective fault diagnosis.

#### **Evidence Required**

- MH2.2.1 Components selected and checked against specification.  
 MH2.2.2 Installation plan prepared (order of actions to be taken).  
 MH2.2.3 Safe working practices followed at all times.  
 MH2.2.4 Components commissioned by following prescribed procedures.  
 MH2.2.5 Start up procedures followed.  
 MH2.2.6 System operational checks carried out and results recorded.  
 MH2.2.7 System operates according to specification.  
 MH2.2.8 System fails to operate according to specification – "Fault, Cause, Remedy" Approach to fault diagnosis is effectively applied to re-establish 2.2.7.

#### **Assessed Ability**

- MH2.3 Pump performance test carried out to assess Q/P relationship under load conditions.

#### **Evidence Required**

- MH2.3.1 Correct diagnostic equipment selected.  
 MH2.3.2 Establish test procedures followed.  
 MH2.3.3 Safe working practices followed at all times.  
 MH2.3.4 Pump specification checked.  
 MH2.3.5 Engine speed for test established.  
 MH2.3.6 Performance results recorded and written report completed covering all actions taken.

**Assessed Ability**

MH 2.4 System contamination levels assessed against established target cleanliness levels.

**Evidence Required**

- MH 2.4.1 Established oil sampling procedures followed.
- MH 2.4.2 Cleanliness control procedures followed to ensure representative sample is taken.
- MH 2.4.3 Sample identification procedures followed.
- MH 2.4.4 Safe working practices followed at all times.
- MH 2.4.5 Sample analysis procedures followed and comparison checks made to determine cleanliness level.
- MH 2.4.6 Written report completed.

## **MOBILE HYDRAULICS PROGRAMME KNOWLEDGE BASED UNIT (MH2)**

**CONTENTS**

- MH 2.5.1 Fundamental Principles.
- MH 2.5.2 Hydraulic System Components.
- MH 2.5.3 Pumps and Associated Control Systems.
- MH 2.5.4 Hydraulic Actuators.
- MH 2.5.5 Circuitry and Control Features.
- MH 2.5.6 Hydraulic Fluids.
- MH 2.5.7 Reservoirs and Auxiliary Equipment.
- MH 2.5.8 Contamination Control.
- MH 2.5.9 Maintenance, Monitoring and Fault Finding.

### **KNOWLEDGE BASED UNIT – WRITTEN EXAMINATION SPECIFICATION**

The examination paper will contain questions from all sections of the programme.

- Examination minimum duration 2 consecutive hours
- Pass mark 60%
- Question style may be single subject, multiple subject, short answer and multiple choice
- All questions will carry equal marks

Where calculations and formulae are involved, all stages of the calculation together with their corresponding units must be shown.

## **MOBILE HYDRAULICS PROGRAMME - (Knowledge Based Unit)**

### **MH2.5.1 Fundamental Hydraulic Principles and Basic Circuit Configuration**

State and use the fundamental principles underpinning the operation of Hydraulic systems and know how they affect performance:

- Pascal's Law (static and dynamic pressure).
  - Know the cause and effect of pressure generation, pressure losses, heat generation, fluid leakage, cavitation, aeration, noise and vibration.
  - State and use the relationship between:
    - pressure, area and the force transmitted by a cylinder
    - flow rate, cylinder dimensions and cylinder velocity
    - pressure, displacement and hydraulic motor torque
    - flow rate, displacement and motor speed
    - pump displacement, shaft speed and flow rate
    - pump flow rate, operating pressure and hydraulic power
    - volumetric efficiency, mechanical efficiency and overall efficiency of pumps and motors
    - pipe diameters, flow rates, fluid viscosity and pressure losses
  - Outline the basic building blocks and circuit configuration for a typical mobile machine:
    - engine
    - main and auxiliary pumps
    - reservoir and fluid
    - steering and braking systems
    - valve control systems
    - motors and actuators
    - filters and coolers
    - pipe work, rigid and flexible
- MH2.5.2 Hydraulic System Components**  
Describe the function and operation of control valves and recognize their graphical symbols on associated circuitry.
- Flow control:
    - flow control devices both fixed and adjustable
    - pressure and temperature compensated flow control devices
    - flow dividers – spool, rotary and priority
  - Pressure control:
    - relief valves – single and two stage
    - vented vent control and unloading principles

- pressure reducing (two way and three way operations)
- joystick control
- sequence valves

c) Load Holding and Motion Control:

- pilot operated check valves
- counterbalance with remote pilot
- hose burst valves

d) Directional Control devices and methods of control (including proportional control):

- multiple port mobile valve (open and closed center including load sensing arrangements, involving pre-compensation)
- control methods including manual, oil pilot and Electro-Hydraulic
- spool valves – including two stage configurations to ISO standards
- poppet valves
- rotary valves
- manual/pilot/on-off solenoid operation and proportional control

### **MH2.5.3 Pumps and Associated Control Systems**

Describe the function and operation of Hydraulic pumps and listed control systems, plus set up procedures as prescribed.

a) Pumps:

- external gear
- internal gear
- gerotor
- vane (fixed and variable)
- axial piston (fixed and variable)
- bent axis (fixed and variable)

b) Control features:

- fixed pumps with relief valve involving vent control
- unloading (two pump system)
- pressure compensation with and without load sensing
- manual displacement control
- constant power control

c) Pump relationship between pressure and flow (Q/P) characteristics.

d) Compensator setting up procedures involving standby and pressure limiting compensators.

e) Effects of engine speed on pump performance.

### **MH2.5.4 Hydraulic Actuators**

Describe function and operation of Hydraulic actuators.

a) Motor types:

- gear
- gerotor/orbit
- vane
- radial piston – single and two speed
- axial piston – fixed and variable displacement
- bent axis – fixed and variable displacement

b) Motor performance:

- series circuitry
- parallel circuitry

c) Cylinders, types, construction, sealing and mounting arrangements:

- single acting
- double acting
- telescopic
- sealing
- mounting arrangements
- cushioning

d) Semi-rotary actuators:

- rack and pinion type
- vane type

### **MH2.5.5 Circuitry and Control Features**

Interpret listed circuitry and associated drive systems.

a) counterbalance and load holding

b) closed hydrostatic circuitry including:

- pump control features
- motor control features

c) two pump unloaded valve circuit

d) pump control circuit including pressure compensation, load sensing and constant power/torque

e) hydrostatic steering circuitry (non-dynamic) including:

- open center
- closed center

f) mobile valve circuitry involving joystick pilot oil control, including:

- open center valve spool arrangements
- closed center valve spool arrangements

g) braking circuitry involving:

- parking brakes
- service brakes

h) regenerative circuitry

i) power take off arrangements for pump transmission applying step up/step down gearbox

### **MH2.5.6 Hydraulic Fluids**

Describe the functions and characteristics of hydraulic fluids.

a) Functions:

- power transmission
- lubrication
- cooling
- sealing
- carrier for contaminants

b) Characteristics and properties and their effect on system performance:

- viscosity
- viscosity index
- lubricity
- oxidation
- pour point
- demulsibility
- material compatibility

c) Oil types and application:

- mineral oil
- glycols
- bio-degradable fluids
- engine oils (SAE grades)
- transmission fluids

d) Storage, handling and transfer:

- explain the need for correct storage, handling, transfer systems and associated cleanliness control
- COSHH regulations and requirements relating to unsafe handling and disposal

### **MH 2.5.7 Reservoirs and Auxiliary Equipment**

Describe the function of a reservoir and associated fluid conditioning equipment and auxiliary components.

a) Describe a typical reservoir with respect to:

- size (relate to pump capacity) with reference to open and closed systems
- general construction
- return line arrangements
- filling arrangements
- level/temperature indication
- contamination control

b) Describe methods of fluid cooling:

- reservoir (size, siting)
- air blast coolers
- water cooled coolers

c) Describe function, operation and typical applications of Accumulators:

- bladder type
- piston type
- diaphragm type
- safety and control features
- pre-charge procedures

### **MH2.5.8 Contamination Control**

Describe contamination control methods.

- origins of contamination
- cleanliness targets – achieving and maintaining
- monitoring fluid condition (sampling and measurement)
- preventive/correction actions
- filter performance and ratings
- filter types
- locations and performance

### **MH2.5.9 Maintenance, Monitoring and Fault Finding Procedures**

Describe maintenance, monitoring and fault finding procedures.

a) Know the importance of RISK MANAGEMENT:

- safe working practices (risk assessment)
- following established procedures
- regular use of diagnostic and test equipment
- analysis of results
- record keeping

b) List common faults and possible causes and effects on system performance:

- high noise level
- vibration
- system/component temperature high
- erratic operations (stick-slip, air inclusion, cavitation, aeration, dieseling)
- incorrect pressure
- incorrect actuator speed
- failing to work within component manufacturers' recommendations
- failure to hold position/load
- leakage

c) Describe procedures that should be followed when carrying out fault diagnosis and rectification:

- safe working practices and associated risk assessments
- identifying the nature of the fault

- identify and remove the cause of the fault and take steps to prevent re-occurrence
- identify information required for effective fault diagnosis and rectification
- use of test equipment and diagnostic techniques
- use of *FCR* (fault, cause, remedy) procedures
- importance of accurate record keeping
- establishing system restart procedures and emergency stop procedures
- re-establishing the workplace "fit for purpose"
- know the difference between preventive action versus corrective action