



# Developing and Revising an ASTM Standard

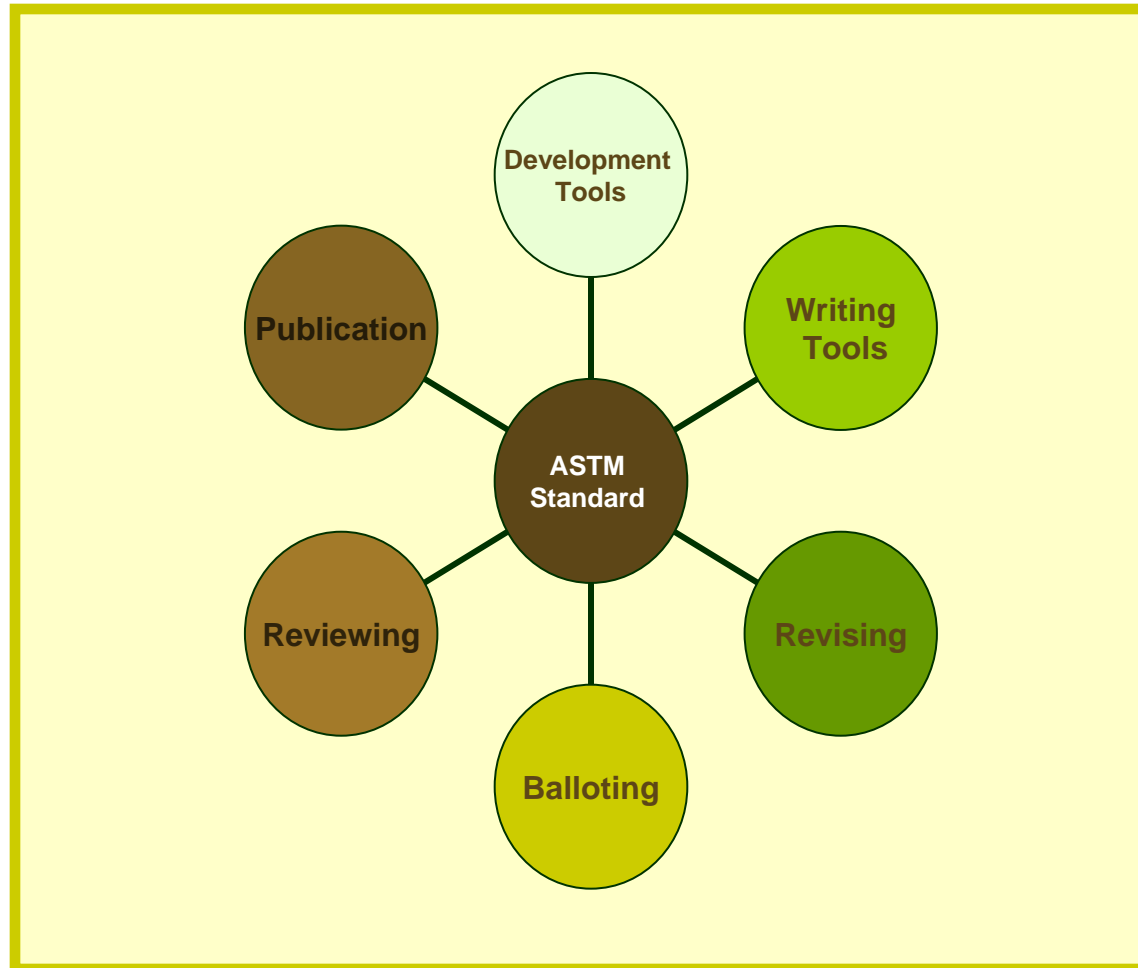
*Editorial and Technical Committee  
Operations (TCO) Module  
Welcome!*



Sean Bailey  
*Senior Editor*

Tom O'Toole  
*Staff Manager*

# Objectives





# New Standard Activity

- Determine if new standard is needed
- Identify and gather key stakeholders
- Identify Subcommittee
- Register a Work Item



# Work Items

- Register Work Item at <http://myastm.org>
  - What is needed?
    - Title
    - Scope
    - Keywords
    - Target date for first ballot
    - Expected target date for approval



# What does a Work Item do?

- Provides tracking number - WK25321
- Alerts those on the Standards Tracking Service and those searching the website
- Stimulates participation from outside of task group



# Development Tools



# Standard Development Tools:

- Virtual Meetings
- Collaboration Area
- Writing Tools
- Draft Templates
- Developmental Editing



# Virtual Meetings

- Online document viewing and editing during the meeting
- Arranged through your Staff Manager or through the MyASTM Section of the website
- Saves time and expenses on meeting face-to-face
- ASTM uses WebEx Meetings, an excellent vehicle for these meetings



# Collaboration Area

[Lifespan](#) - [About Collaboration Area](#) - [Back to MyASTM](#) - [B10 Meetings](#) - [Tech Support](#) - [Log Out](#)



## ASTM Collaboration Area

### Collaboration on [WK34871](#) - Revision of [B265](#)

Created:      Target Date: 2012-05-01      Technical Contact : [James McMaster](#)

**Drafts**

**Discussion**

**Files**


**Members**

**History**

#### Work Item Description:

This revision will add a lot definition to B265. It is expected that this work will lead to adding or modifying lot definitions in other titanium (and possibly zirconium) specifications.

[Edit Work Item >>](#)

 **Draft Standard**

[Learn More >>](#)







[Upload New Draft](#)

[Add/Update Message](#)

The technical contact for this collaboration area has not yet posted a draft.

#### What's New?

#### Administration

-  [Remove Drafts](#)
-  [Invite/Remove Members](#)
-  [Add/Remove/Edit Timeline](#)
-  [Remove Files](#)
-  [Remove Comments](#)
-  [Remove Discussions](#)

#### Related Links

- [Edit Work Item](#)
- [Submit Item For Ballot](#)
- [Schedule Online Mtg/Conf. Call](#)
- [Collaboration Video Demo](#)



# Writing Tools



# Submit your draft in WORD

- ASTM requests WORD for balloting purposes because it is the most common word processing program.
- TCO takes your WORD file and converts it to PDF for the ASTM website online balloting area.
- Developmental editor works directly with you in WORD to develop your draft.
- Committee editor converts the WORD file into SGML (Standard Generalized Markup Language) for composition and electronic publishing purposes.



# Form and Style Manual

- On [www.astm.org](http://www.astm.org) under:
  - Technical Committees
  - Standards Development
  - Form and Style for ASTM Standards “Blue Book”
  
- Gives guidance and answers to most questions you may have while writing your standard
  
- Your editor is available to answer questions you may have about the manual



# Form and Style Contents

Introduction.....	vi
Definitions .....	vii
Part A. Form of ASTM Test Methods .....	A-1
Part B. Form of ASTM Specifications.....	B-1
Part C. Form of Other Types of ASTM Standards .....	C-1
Part D. Use of the Modified Decimal Numbering System .....	D-1
Part E. Terminology in ASTM Standards.....	E-1
Part F. Legal Aspects in Standards—Special Instructions .....	F-1
Part G. Standards Style Manual.....	G-1
Part H. Use of SI Units in ASTM Standards.....	H-1



# About ASTM Templates

- Available at [www.astm.org](http://www.astm.org) on Technical Committees page under the tab “Standards Development”
- Templates for: Test Method, Specification, Guide/Practice, Classification, and Terminology
- Detailed instructions are provided with the template



# ASTM Templates Features

- Suggested and mandatory headings are provided; mandatory headings are in **RED**
- Dialog box prompts to insert Title and Footnote 1
- Ability to insert tables, figures and equations
- Auto Numbering (this is a limited but helpful feature)
- Layout in one column format for ballot/editing purposes





# Screen Snap of Template



Designation: X XXXX-XX

Work Item Number: WK12345

Date: 04/20/10

1 **Include Ballot Rationale Here (Required for all Ballots)**

2

3 **Standard Test Method for**  
4 **Testing Cellular Insulation Block<sup>1</sup>**

5

6

7 This standard is issued under the fixed designation X XXXX; the number immediately following the designation  
8 indicates the year of original adoption or, in the case of revision, the year of last revision. A number in parentheses  
9 indicates the year of last reapproval. A superscript epsilon ( $\epsilon$ ) indicates an editorial change since the last revision or  
10 reapproval.

11

12

13

14

15

16

17

18

## 1. Scope

19

1.1

20

1.2 *Include in this section the system of units to be used. Refer to the above ASTM Standards*

21

*Units toolbar button for a dropdown menu of ASTM's Form and Style Manual statements.*



# Screen Snap of Template

17

18 **2. Referenced Documents**

19 2.1 *ASTM Standards:*

20

21 **3. Terminology**

22 3.1 *Definitions:*

---

<sup>1</sup> This test method is under the jurisdiction of ASTM Committee C16 on Thermal Insulation and is the direct responsibility of Subcommittee C16.32 on Mechanical Properties.

Current edition approved XXX. XX, XXXX. Published [XX XXXX].

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# ASTM Template Toolbar

The screenshot displays a software interface with a toolbar at the top and a document area below. The toolbar, which is circled in red, contains various icons for text formatting (bold, italic, underline, list, indent), alignment, and other functions. The document area shows a table of contents with the following entries:

25	<b>4. Summary of Test Method</b>
26	4.1
27	
28	<b>5. Significance and Use</b>
29	5.1
30	
31	<b>6. Interferences</b>
32	6.1
33	
34	<b>7. Apparatus</b>
35	7.1
36	



# ASTM Template Toolbar

10 **1. Scope**

11 1.1

12 *1.2 Include in this section the system of units to be used. Refer to the above ASTM Standards*

13 *Units toolbar button for a dropdown menu of ASTM's Form and Style Manual statements.*

14 1.3 *This standard does not purport to address all of the safety concerns, if any, associated*

15 *with its use. It is the responsibility of the user of this standard to establish appropriate safety and*



# ASTM Template Toolbar

12 1.2 *Include in this section the system of units to be used. Refer to the above ASTM Standards*

13 *Units toolbar button for a dropdown menu of ASTM's Form and Style Manual statements.*

14 1.3 *This standard does not purport to address all of the safety concerns, if any, associated*

15 *with its use. It is the responsibility of the user to establish appropriate safety and*

16 *health practices and determine the limitations prior to use.*



17

18 **2. Referenced Documents**



# ASTM Template Toolbar

10 **1. Scope**

11 1.1

12 1.2 *Units* - The values stated in SI units are to be regarded as standard. No other units of

13 measurement are included in this standard.

14 1.3 *This standard does not purport to address all of the safety concerns, if any, associated*

15 *with its use. It is the responsibility of the user of this standard to establish appropriate safety and*

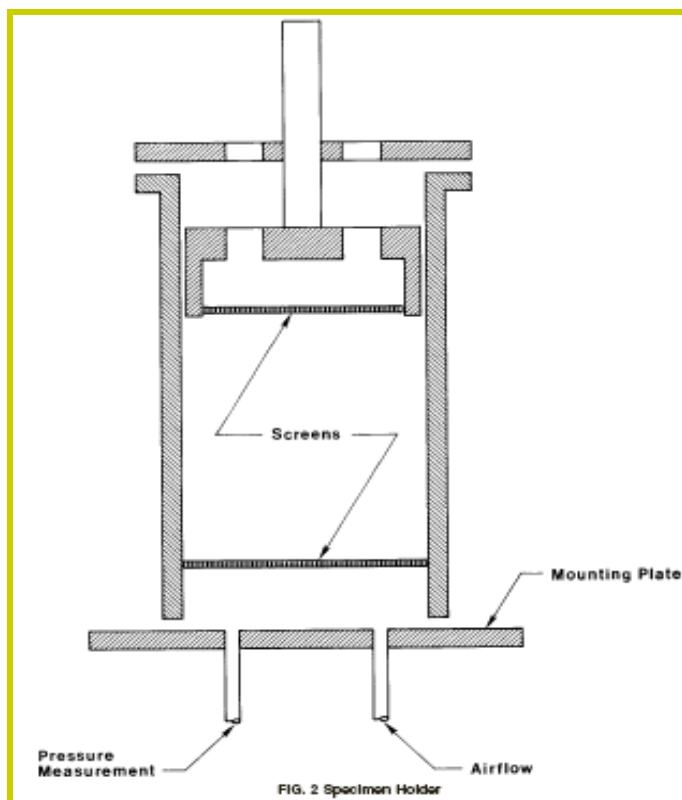
16 *health practices and determine the applicability of regulatory limitations prior to use.*



# Developmental Editing

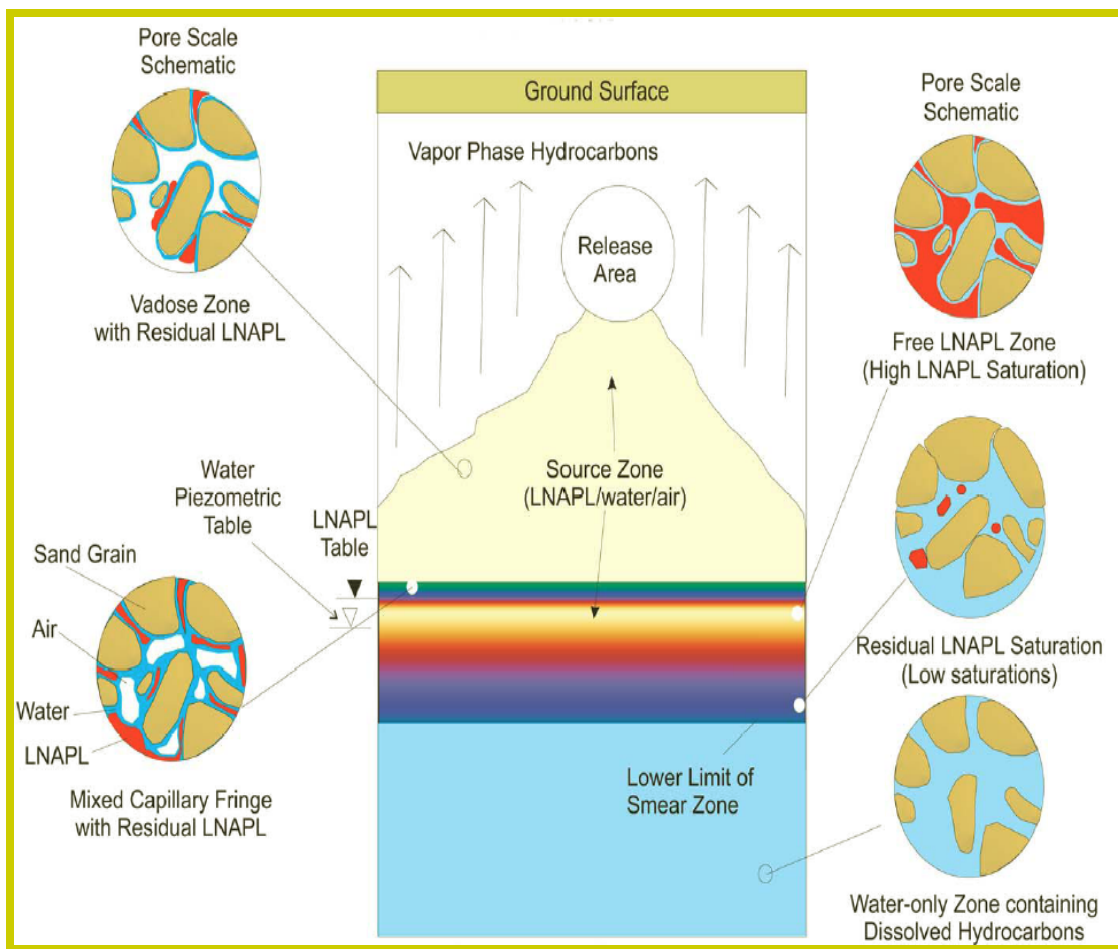
- If you have questions while writing a draft standard, contact the developmental editor.
  - Developmental editor can be reached by phone or e-mail.
    - [kpeters@astm.org](mailto:kpeters@astm.org) (Kathy Peters)/ 610-832-9650
- Developmental editor can help you with:
  - Answering questions about the *Form and Style for ASTM Standards* and how to apply our style to standards
  - Upfront editing of new, revised, reinstated standards
  - Assisting with artwork issues

# Figures and Artwork



- Submit clean, readable figures
  - If revising an existing figure for ballot, submit changes to our Developmental Editor
- TIF, JPG and AUTOCAD formats are acceptable
  - Graphics department will work with what you have

# Color Figures



- Only available:
  - PDF Downloads
  - CD version of the *Annual Book of Standards*
  - Online Volumes



# Revisions



# Registering Revisions

- Register new work item
- Registering generates a request for WORD file of the latest version of the standard from ASTM International
  - An email with a link to the WORD version of the standard will be sent to the technical contact
  - If you are the technical contact, you will have access to a WORD version of the standard on the work item summary page after you log in to MyASTM



# My ASTM Work Items



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INTERNATIONAL  
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## MyASTM

**MyASTM/MyCommittees**

Welcome, Jeffrey Adkins - [Recent Activity](#)

Please check your contact information and update if needed.

**My Outstanding Ballots** 8

Select ballot

**My Next Meetings**

Select meeting

**My WK (Work Items)**

Select work item

Select work item

View All

- B02
- B10
- C18
- D01
- E08
- F18
- F20
- G03

**My Collaboration Areas**

Select Collaboration Area

**MyCommittees**

**Committee B02 on Nonferrous Metals and Alloys**

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**Committee C18 on Dimension Stone**

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**Committee D01 on Paint and Related Coatings, Materials, and Applications**

**My Tools**

- Ballots & Work Items >
- Meetings, Minutes & Agendas >
- Additional Resources >
- Roster Maintenance 173
- Negatives & Comments 104


**Account#:** 000227339

[Order History](#)

Jeffrey Adkins




# My ASTM Work Item



Standards Worldwide - Home

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- Digital Library Home
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## MyASTM

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### MyASTM / My B10 Work Items

Jeffrey Adkins,

You are a task group member on the Work Item(s), or WK(s) listed below. Where you serve as the Technical Contact, the WK(s) are shown in red.

---

#### B10.01 on Titanium

- Proposed: **WK24363** Technical Contact: David Tripp
- **B265-10** Standard Specification for Titanium and Titanium Alloy Strip, Sheet, and Plate  
**WK30879** Technical Contact: Keisuke Nagashima  
**WK33377** Technical Contact: Richard Porter
- **B295-08** Standard Specification for Titanium Sponge  
**WK31135** Technical Contact: David Tripp
- **B338-09** Standard Specification for Seamless and Welded Titanium and Titanium Alloy Tubes for Condensers and Heat Exchangers  
**WK24604** Technical Contact: James McMaster
- **B348-09** Standard Specification for Titanium and Titanium Alloy Bars and Billets  
**WK26972** Technical Contact: Chris Wilson
- **B600-09** Standard Guide for Descaling and Cleaning Titanium and Titanium Alloy Surfaces  
**WK33804** Technical Contact: James Grauman
- **B862-09** Standard Specification for Titanium and Titanium Alloy Welded Pipe  
**WK25838** Technical Contact: James McMaster
- **B863-10** Standard Specification for Titanium and Titanium Alloy Wire  
**WK32367** Technical Contact: John Mountford Jr.
- **B891-98(2004)** Standard Specification for Seamless and Welded Titanium and Titanium Alloy Condenser and Heat Exchanger Tubes With Integral Fins



# My ASTM Work Item Summary



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## ASTM WK30879

[\(What is a Work Item? / How to Input to a Work Item\)](#)

**Work Item:** ASTM WK30879 - Revision of [B265-10](#) Standard Specification for Titanium and Titanium Alloy Strip, Sheet, and Plate

**Active Standard:** [B265-11](#)

Developed by Subcommittee: [B10.01](#) | [Committee B10 Home](#) | [Contact Staff Manager](#)

[More B10.01 Standards](#)

[Related Products](#)

[Copyright/Permissions](#)

**Work Item Status:**

**Date Initiated:** 11-06-2010

**Technical Contact:** Motomi Masaki

**Status:** Draft Under Development

[Standards Tracker](#)

[Standards Subscriptions](#)

### 1. Rationale

Our request is that in ASTM B265-10, in the definition of plate, the size range be extended up to 3.71mm in thickness. Specifically, it is requested that in section 3. Terminology, the lower limit of thickness should be changed from 0.187 in. (4.76mm) to 0.146 in. (3.71mm), and that in TABLE 13, 0.187(4.76)to0.375(9.52), excl. should be changed to 0.146 (3.71)to0.375(9.52), excl. We ask this because while plate is ordinarily manufactured on a plate mill, with the plate mill, it is



# Electronic Revision Preparation

- Always keep a clean copy of standard
- Determine if entire document is to be balloted, or just sections
  - Determine which sections need revision
  - Determine how much context is needed for a revision to make sense to the voter
- Use Track Changes to make revisions



# Example of Ballot Item

## WK17530

Date: April 20, 2010

To: ASTM D07 Main Committee and D07.02 Subcommittee Members

From: B.J. Yeh, Subcommittee D07.02 Chair

Revisions to ASTM D5456 -- SCL

At the last D07.02.03 SCL section meeting on October 16, 2008, a question was raised on Section A2.7.5 for the evaluation of equivalent specific gravity of bolts for SCL. This ballot items addresses that change.

Should you have any questions concerning this ballot, please don't hesitate to contact me by e-mail at [borjen.yeh@apawood.org](mailto:borjen.yeh@apawood.org) or phone 253.620.7467.

A2.7.5 Equivalent specific gravity values for design use with bolts shall be the average of individual equivalent specific gravity values for all bolt diameters ~~and load directions for a given orientation (X or Y) provided that they do not differ from the average of the test results by more than 0.03. If dowel bearing tests are conducted in both the X and Y orientations then an equivalent specific gravity value shall be determined for each orientation. One equivalent specific gravity is to be specified for both Y and X orientations then it shall be the lower of the two individual values.~~



# Balloting



# Submitting Item for Ballot Online

- ASTM Home
- MyChoices
- MyCommittees
- Digital Library Home
- Change Password
- Update Your Information
- Invite A Colleague
- Join Additional Committees
- Drop Subcommittees
- Help

### My Tools

- Ballots & Work Items** >
- Meetings, Minutes & Agendas >
- Additional Resources >
- Roster Maintenance **173**
- Negatives & Comments **104**

Account#: 000227339  
[Order History](#)  
 Jeffrey Adkins

## MyASTM/MyCommittees

Welcome, Jeffrey Adkins - [Recent Activity](#)

Please check your contact information and [update](#) if needed.

<b>My Outstanding Ballots</b> <b>8</b>	<b>My Next Meetings</b>	<b>My WK (Work Items)</b>
Select ballot <input type="text"/>	Select meeting <input type="text"/>	B10 <input type="text"/>
<b>My Collaboration Areas</b>		
Select Collaboration Area <input type="text"/>		

## MyCommittees

### Committee B02 on Nonferrous Metals and Alloys

- Submit/Edit
- Minutes
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### Committee B03 on Active and Refractory Metals and Alloys

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- Standards Tracking

### Committee C18 on Dimension Stone

- Main Page
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- Agendas
- Committee Documents
- Standards Tracking

### Committee D01 on Paint and Related Coatings, Materials, and Applications



# Balloting

- ASTM has three levels of ballot
  - Subcommittee
  - Main Committee
  - Society
- Ballots are open for a minimum of 30 days, all ballots are done online



# Subcommittee Ballot

- Ballot item submittal
- Develop a strategy for considering ballot results
- Task group chairman calls/emails negative voters before ballot closes
- Task group may decide to revise draft and reballot before Subcommittee meets



# Main Committee Ballot

- Items that pass subcommittee ballot with no negatives move automatically to main committee ballot
- Drafts that have been through at least one subcommittee ballot can be balloted at main



# Concurrent Sub/Main Ballot

- During the balloting process:
  - Editor begins working on item with the start of the balloting process
  - Technical contact should contact negative voters while ballot is open in order to resolve the negative
  - Discuss strategy for how to resolve negative votes with your staff manager
  - Contact your staff manager with your negative ballot resolutions



# Negative Resolutions

- Five possible resolutions:
  - Withdrawal
  - Withdrawal with Editorial Changes
  - Persuasive
  - Not Persuasive
  - Not Related



# Online Negative Resolutions

MyChoices

Change Password

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Help

## MyASTM / Ballot Negatives and Comments / Ruling

[Support Desk](#) | [Return to List of Ballots](#) | [Return to Ballot Negative and Comments](#) | [Return to MyCommittees](#)

### MAIN COMMITTEE BALLOT F18 (11-06)

#### ITEM 002 - REAPPROVAL OF F0479-2006

Submit disposition of **Gregory M Cain** negative vote. Click [here](#) to view negative.

<input type="radio"/>	FAIL - (Item failed percent affirmative requirement)
<input type="radio"/>	<b>PERSUASIVE - (Any part of the negative vote was found persuasive; Item removed from ballot)</b>
<input type="radio"/>	<b>WITHDRAWN (Entire negative vote was withdrawn without editorial changes)</b>
<input type="radio"/>	<b>WITHDRAWN WITH EDITORIAL CHANGES (Entire negative vote was withdrawn with editorial changes)</b> Clearly distinguish editorial changes from the ballot item using "track changes" or provide in a separate list format (attach below). Please do not provide a clean copy of the document. Submission may be made in separate document. <input type="text"/> <input type="button" value="Browse..."/>
<input type="radio"/>	<b>NOT PERSUASIVE (Entire negative vote was found not persuasive or there is a combination of not persuasive and withdrawn dispositions)</b>
<input type="radio"/>	<b>NOT RELATED (Entire negative vote was found not related or there is a combination of not related and withdrawn dispositions)</b>

Clear Resolution

Accept Resolution

Cancel



# While the Standard is Balloting...

- The Editor begins the editing process, which includes:
  - Typesetting/converting Word document to SGML
  - Scanning and placing artwork
  - Ensuring the standard matches balloted draft
  - Ensuring that tables and figures are cited and numbered correctly
  - Verifying titles of ASTM standards in the Referenced Documents section and verifying that they are all cited in the text



# While the Standard is Balloting...

- The Editor will also:
  - Ensure that section and cross-references are correct (for example, See Table 1)
  - Confirm that all mandatory sections are included and in the correct order
  - Review supplier footnotes for compliance with Part F in the Form and Style for ASTM Standards manual



# Typical Corrections

- Grammar
- Typographical errors
- The editor will ensure that:
  - Certain formats or spellings appear consistently throughout the standard
  - Trademarked terms are replaced with generic terms (for example: “Pyrex” becomes “borosilicate glass”)
  - Technical terms are spelled in accordance with ASTM Form and Style. A few of the most corrected terms are: metre and litre



# Editorial vs. Technical Changes

- Editorial changes do NOT change the meaning or intent of a standard and do NOT require balloting.
  - Changes can be made during review process
  
- Technical changes CHANGE the meaning or intent of a standard and REQUIRE balloting.
  - Changes must be made on the next ballot



# New Standard Receives Approval

- A standard will receive official Society approval on the **1<sup>st</sup>** and **15<sup>th</sup>** of the month.
- Once a standard receives society approval, the editor is notified and prepares the standard for review by the technical contact (reviewer) listed on the ballot.
- If editorial changes were provided during the balloting process or as the result of negative vote resolution, the editor includes those changes in the standard sent for review.



# Review



# Review Process

- The editor e-mails a licensed PDF and redlined PDF of the standard for review.
- This email:
  - Will provide a link to the online ballot item.
  - Will note if the “Units of Measure” statement in the Scope does not follow Form and Style and requires correction.



# Review E-mail

ASTM STANDARD: A1234-11

MAIN BALLOT: A0104011

ITEM NUMBER(S): 1

[REVISION OF A1234-09 TEST METHODS FOR Conducting Time-for-Rupture Notch Tension Tests of Materials WK20332](#)

Dear Mr./Ms. Doe,

A PDF version of the approved standard is attached for your review prior to publication. The above link has been provided to direct you to the ballot item document, if needed for reference.

Also included is a redline PDF. Although it is not an official document, this redline will assist your review by indicating all areas where changes were made.

Any editorial changes resulting from comments received during the balloting process need to be incorporated at this time.

#### **“Units of Measure” Statement Requires Correction**

**ASTM International has mandated the review of every standard to determine if the “units of measure” statement in the Scope conforms to ASTM’s form and style. Upon review, this standard was identified as either missing this statement or including an incorrect statement. To correct this, the appropriate statement from ASTM’s current Form and Style Manual has been inserted editorially. If you have no objection, this standard will be released for publication with the new statement.**

If this item received comments that require further consideration at an upcoming meeting, please contact your staff manager immediately to determine if publication should be delayed.

Please provide any changes or comments to me by **XXXXX**, or I will move forward to final publication. A PDF of the standard will be sent to you upon final publication.

Thanks and have a great day!

---

Emilie Olcese  
Editor Standards Publications  
[eolcese@astm.org](mailto:eolcese@astm.org)  
Phone: 610.832.9663  
Fax: 610.834.3602



# Reviewer's Checklist

- The reviewer should ensure that all balloted information appears correctly in the printed standard
- Address any questions the editor may have posed in the cover letter
  - Typical questions include:
    - Citation of Referenced Documents in the text
    - Addition of Keywords
- The reviewer should respond to the editor by the stated deadline. This ensures the timeliest publication of the new standard. Contact the editor immediately if an extension is needed.



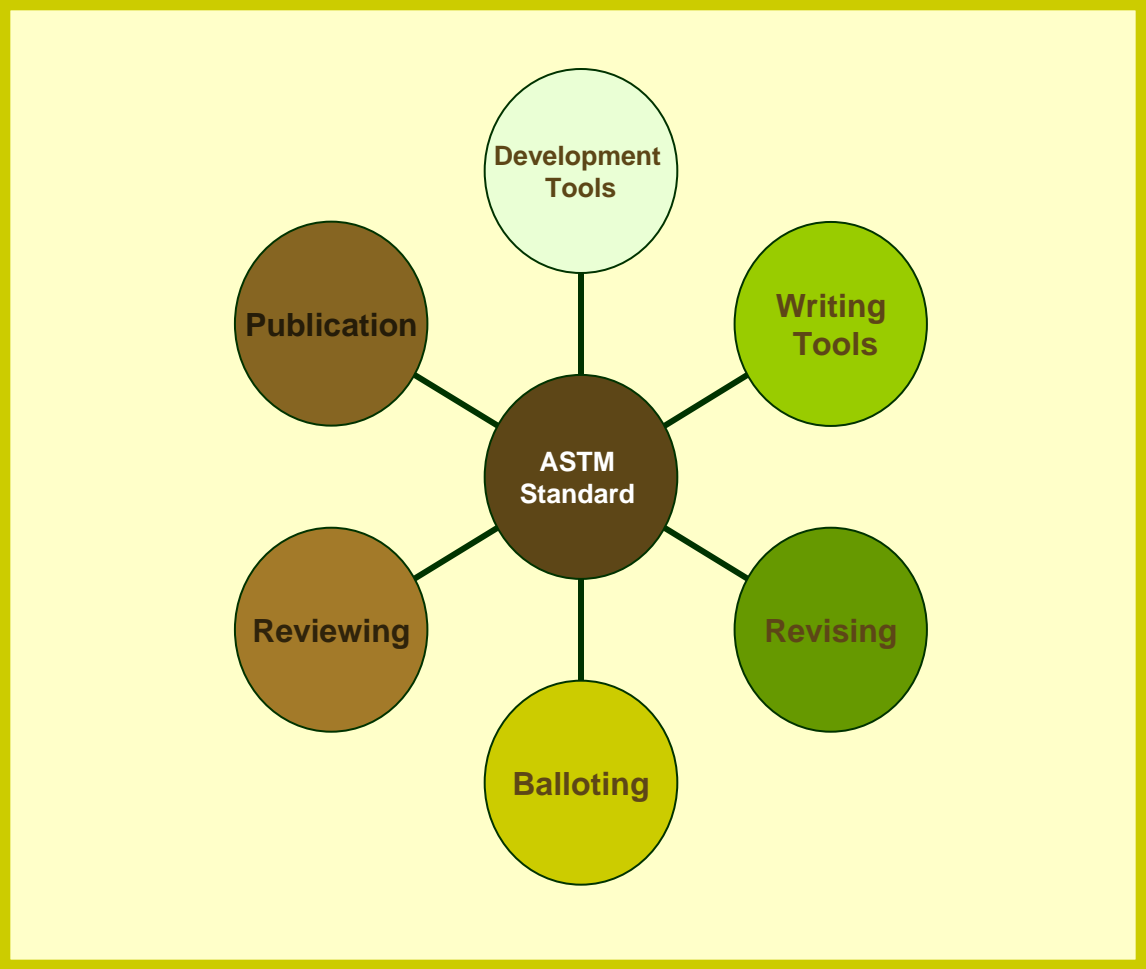
# Publication



# Final Publication

- Editor sends final approved document to ASTM website team
- Within a week the standard is available online as a separate
- The printed *Book of Standards* is a snapshot of what was completed at the time the book published, but the ASTM website will always have the most updated version of the standard

# Review





# Contact ASTM International

Web : [www.astm.org](http://www.astm.org)  
phone : +1 610/832-9585  
fax : +1 610/832-9555  
address : ***ASTM International***  
100 Barr Harbor Drive  
PO Box C700  
W. Conshohocken, PA  
19428-2959  
USA



Thank you for attending!

Enjoy the rest of your  
week!