

## **ASTM Section D02.B0.10** **Minutes of Meeting on December 9, 2013**

The ASTM Regulation 10.8 says that the 'F and S shall be followed in the writing of', and the B-10 Scope (first paragraph) says that the 'F and S to be followed in all cases'.  
**Change maintained to follow per Lyle's suggestion.**

### Call to Order

ASTM Section D02.B0.10 on Standards Acceleration met on Monday, December 9, 2013 at 8:14 am at the Marriott Waterside Hotel in Tampa, FL. The meeting started 14 minutes late because the chairman was delayed. There were six members and one guest in attendance. The list of membership and attendance is shown in Attachment 1.

### Chairman's Comments

As always, each member is encouraged to review the scope and objectives of the committee to understand what we do. Each member needs to recognize that D02.B0.10 maintains a staff of facilitators to expedite the establishment of standards relating to automotive lubricants. The committee does not develop, approve or oversee test method processes. The facilitators' activities include upgrading previously developed and approved test procedures to ASTM test methods, and revising standards as needed once they are adopted. The committee ensures that the *Form and Style for ASTM Standards* is ~~maintained~~.

### Minutes from June 24, 2013 Meeting

The June 24, 2013 meeting minutes were approved as posted.

### Membership

Mark Adams requested reinstatement as a voting member. Laura Birnbaumer asked to be added as a non-voting member. The chairman agreed to make both updates.

### Facilitator Reports

Reports from three facilitators were received. Written reports submitted are shown in Attachment 2.

June-December 2013	
Facilitator	Hours
Lyle Bowman	35
Terry Bates	70
Hap Thompson	17

### Facilitator Assignments

Current facilitator assignments were reviewed and are summarized in Attachment 3. Some of the new test procedures are starting to be developed and it is expected that drafts of test procedures will be available the 1<sup>st</sup> quarter of 2014. B03 has requested that the replacement L-33-1 test be placed on the list requiring facilitator help. The chairman will monitor new test development activity and update assignments as necessary.

### Old Business

No old business was conducted at the meeting. Attachment 4 shows the B10 section scope and objectives that were not reviewed at the meeting.

### New Business

Because of the meeting's late start, half-hour meeting length and the need to give up the room for another meeting group, the chairman invited all in attendance to go across the hall to an open meeting room to discuss the revisions to the TMC Roles annex at 8:30 am. All in attendance except for one attendee moved across the hall.

For background on the TMC Roles annex, there was a teleconference on Oct 29 between Frank, Lyle, Hap and Terry to discuss how to achieve more consistency of the text for those sections of test methods involving use of TMC services. These are normally given in an Introduction, in a section devoted to Calibration and Standardization, and in an Annex (usually Annex A1). Currently there is no consistency either in the text used or in the matters covered between test methods. Since we will be facilitating a new batch of methods, it was agreed that we should agree on what are generic activities for TMC in those tests using TMC services and the text involved

Those preceding discussions have led the group to offer Lyle's version of the test method introduction section below:

#### INTRODUCTION

This test method is written for use by laboratories that utilize the portions of the test method that refer to ASTM Test Monitoring Center (TMC)<sup>1</sup> services. Laboratories that choose not to use the TMC services may simply ignore these portions.

The TMC provides reference oils, and engineering and statistical services to laboratories that desire to produce test results that are statistically similar to those produced by laboratories previously calibrated by the TMC.

Various organizations such as the International Lubricant Standardization and Approval Committee (ILSAC) and American Petroleum Institute (API) require that a laboratory utilize the TMC services in seeking qualification of oils against specifications.

The committee unanimously agreed to accept the above wording.

The group also noted that several sections of each test method need to be revised to maintain consistency. Terry and Lyle have drafted the following examples. The TMC will expand on these sections for the group to review in the next month. Once approved these revisions will be incorporated into each test method

### **13. Report**

13.1.1 For reference oil results, use the standardized report form set and data dictionary for reporting test results and for summarizing operational data.

NOTE N—Report the non-reference oil test results on these same forms if the results are intended to be submitted as candidate oil results against a specification.

13.1.1.1 Fill out the report forms according to the formats shown in the data dictionary.

13.1.1.2 Transmit results to the TMC within 5 days of test completion.

13.1.1.3 Transmit the results electronically as described in A2.6.

13.1.2 Report test results from all reference oil tests run to completion, regardless of

validity.

13.1.3 *Deviations from Test Operational Limits*—Report all deviations from specified test operational limits.

Attachment 5 shows the proposed annex to describe the 'TMC Roles'. The group agreed to review the annex over the next month. Once the committee approves the introduction, report section revisions and annex these items will be included in new test methods as they are released. The chairman will notify surveillance panel chairs about the desire to have these revisions incorporated in future information letters.

Next Meeting

The meeting will be Monday June 23, 2014 in Indianapolis, IN


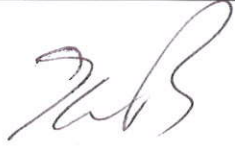




Adjournment

The meeting was adjourned at approximately 8:35 am and moved across the hall for additional discussion on the TMC Roles section. That discussion ended at 8:55 am.


Frank M. Farber  
Chairman, ASTM D02.B0.10

Attachments

B10 Attendance List  
December 9, 2013  
Tampa, FL

Contact Information	Membership Status	Present
Mark Adams Tribology Testing Labs 7030 East Street Saginaw, MI 48601 989-777-0839 <a href="mailto:mark@tribologytesting.com">mark@tribologytesting.com</a>	<i>To Be Voting</i> <del>Non-Voting</del> Member	
Terry Bates 50 Tower Rd. North Heswall, Wirral CH60, 6RS UNITED KINGDOM +44-151-342-1193 <a href="mailto:batesterryw@aol.com">batesterryw@aol.com</a>	Voting Member	
Lyle O. Bowman 728 Montecillo Road San Rafael, CA 94903 415-479-3004 FAX 415-472-1570 <a href="mailto:jbfoodie@comcast.net">jbfoodie@comcast.net</a>	Voting Member	
George E. Callis Spectrum Corporation 2019 SE Oxtan Drive Port St. Lucie, FL 34952-6066 561-337-5060 FAX 561-337-5061 <a href="mailto:ecallis@spectrumcorporation.com">ecallis@spectrumcorporation.com</a>	Non-Voting Member	
Frank Farber ASTM Test Monitoring Center 6555 Penn Avenue Pittsburgh, PA 15206 412-365-1030 FAX 412-365-1047 <a href="mailto:fmf@astmtmc.cmu.edu">fmf@astmtmc.cmu.edu</a>	Chairman/Secretary	
Joe Franklin Intertek Automotive Research 5404 Bandera Road San Antonio, TX 78238 210-523-4671 FAX 210-684-6074 <a href="mailto:joe.franklin@intertek.com">joe.franklin@intertek.com</a>	Voting Member	
Jerry Gropp The Lubrizol Corporation 29400 Lakeland Blvd. Wickliffe, OH 44092 440-347-1223 FAX 440-347-1555 <a href="mailto:jlg@lubrizol.com">jlg@lubrizol.com</a>	Voting Member	

B10 Attendance List  
December 9, 2013  
Tampa, FL

<p>Ted Selby Savant, Inc. 4800 James Savage Road Midland, MI 48642 989-496-2301 FAX 989-496-3438 <a href="mailto:tselby@savantgroup.com">tselby@savantgroup.com</a></p>	<p>Non-Voting Member</p>	
<p>William Sullivan W. T. Sullivan, Inc. 5 Scheiber Drive Brick, NJ 08723 908-930-3512 FAX 267-220-7750 <a href="mailto:wtsullivan@comcast.net">wtsullivan@comcast.net</a></p>	<p>Non-Voting Member</p>	
<p>E. A. Hap Thompson PPL Standards Development 404 Twin Oaks Lane St. Johns, FL 32259 904-287-9596 FAX 904-287-9596 <a href="mailto:hajthom@aol.com">hajthom@aol.com</a></p>	<p>Voting Member</p>	
<p>Ben Weber Southwest Research Institute 6220 Culebra Road San Antonio, TX 78228-0510 210-522-5911 FAX 210-684-7523 <a href="mailto:bweber@swri.edu">bweber@swri.edu</a></p>	<p>Non-Voting Member</p>	

B10 Attendance List  
 December 9, 2013  
 Tampa, FL

<p>Laura Birnbaumer                  Chevron Oroville                  100 chevron way 60-1146                  Richmond, CA 94802                  LABI@chevron.com</p>		

E. A. Hap Thompson  
404 Twin Oaks Lane  
St. Johns, FL 32259  
904-287-9596  
December 9, 2013

### Sequence VI E

The VIE SP has held conference calls since the June D02 meeting to resolve some of the issues challenging them. I attended the SP meetings in San Antonio week of November 18. The OHT reported the VID & VIE engine usage and expected depletion date of VID engines. It appears they are in pretty good shape. The VIE oil pan levels issue was discussed at great length. Measure the distance from the bottom surface of the oil pan tab to test full mark on oil pan. When the final decision is made, the specification will be added to the draft procedure. It appears the additized fuel is the answer to the fuel issue. Haltermann has obtained a supplier for the additized fuel which is identified as EEE + DCA and it is currently being used in the Industry. The SP approved the use of this fuel. We should be adding revisions to the draft standard this winter.

### Sequence IVB

The SP continues to have problems with Nissan and their camshafts. Additionally, Nissan has not been packaging the camshafts properly and they have been arriving to OHT damaged. The SP is looking into using some of the older camshafts if the testing goes well. Toyota discussed the Sequence IVB Golden Stand concept. The labs that have been selected by Toyota to perform the initial IVB test are concerned there is not sufficient time allowed to receive the new test stands, to perform the start-up testing to get out the bugs and meet the test matrix time line. Toyota stated they understood the concerns and would work closely with the labs.

Respectfully submitted,  
*E. A. Hap Thompson*

E. A. Hap Thompson, Facilitator

Lyle Bowman's Facilitator Report to B-10  
December 9, 2013

About 35 hours were spent on various assignments since the June 2013 Meeting. These efforts have involved preparation of 10 D02 ballot items from approved Information letters, reviewing editor's proofs, and reviewing new Information Letters.

All of the D02 ballot items that were revisions resulting from approved Information Letters were approved with minor comments.

Five negative votes were received on the D4485 D02 ballot item that proposed replacing g/MJ with g/kWh for an oil consumption measurement. During the June 2013 Subcommittee B and D02 Meetings, the negative votes were judged not persuasive. As of today, the five negative votes on this ballot item are still unresolved.

In checking to determine what the current resolution status of these negatives is, it was learned that they have not yet been forwarded to the COS for review. Some 'glitch' in the D02 reporting system apparently occurred. The next meeting of the COS is in March, 2014. Most likely, that is when the D02 action taken on these negatives will be reviewed.

Respectfully submitted,  
Lyle Bowman



## **Facilitator Report to ASTM Section D02.B0.10 Standards Acceleration**

**Facilitator:** Terry Bates

**Report period:** June 1, 2013 to Dec. 1, 2013

### **L-37-1 Test: Load-Carrying Capacity of Lubricants Used for Final Hypoid Drive Axles**

The test is under the jurisdiction of the L-37 Surveillance Panel, chaired by Chris Prengaman.

Feedback was obtained on August 5 on Draft 1 which describes the new, more representative hypoid axle assembly and replaces the gasoline engine power source by an electric motor. Draft 2 was completed on Sept. 14. It:

- incorporates the comments made on Draft 1.
- makes suggestions for the rationalized SI units that will replace inch-pound units as standard.
- adds an Introduction regarding the role of the TMC.
- incorporates a revised Summary section to conform with ASTM requirements.
- adds some definitions of exiting terms used in the L-37-1.
- adds pinion shaft break & turn torques, backlash and pinion bearing ratings to the report section as these are measured and recorded but were not required to be reported in L-37.

During editing of the various sections dealing with the role of the TMC, it was apparent that there is no consistency across existing test methods, for either the text or the activities of the TMC. To ensure consistency for the text for generic TMC activities proposals have been made for the text for the Introduction, Calibration/Standardization section, Report section and Annex A1. These are currently under discussion by B10. When agreed, they will be incorporated into the L-37-1 method.

Feedback on draft 2 is awaited. The next draft is expected to be final in all critical areas with only fine tuning thereafter.

Chris envisages that a precision round robin on the L-37-1 method will start late Q1.2014 with a completion date of Q3.1014. A Sub B ballot is envisaged in Q4.2014.

**Current Facilitator Assignments**

<u>Facilitator</u>	<u>Methods</u>
T. Bates	L-37-1
L. O. Bowman	Test Method Updates, D4485, SI Units
E. A. Thompson	Sequence VIE

PC-11 Test Assignments  
First License Date 1/2016  
Mandatory Use Date 1/2017

Test Type	Contact Person	Facilitator
C-13 Aeration Test	Martin Thompson – <a href="mailto:martin.thompson@swri.edu">martin.thompson@swri.edu</a>	Terry Bates
DDC/Daimler Scuffing Test	Jon Cruz – <a href="mailto:John.Cruz@Daimler.com">John.Cruz@Daimler.com</a>	Terry Bates
Mack T-13	Greg Shank – <a href="mailto:greg.shank@volvo.com">greg.shank@volvo.com</a>	Hap Thompson
Shear Stability Test	Heather DeBaun - <a href="mailto:Heather.DeBaun@Navistar.com">Heather.DeBaun@Navistar.com</a>	

GF-6 Test Assignments  
First License Date 1/2017  
Mandatory Use Date 1/2018

Test Type	Contact Person	Facilitator
Sequence VH	Ron Romano – <a href="mailto:ron.romano@ford.com">ron.romano@ford.com</a>	Lyle Bowman
Chain Wear Test	Ron Romano – <a href="mailto:ron.romano@ford.com">ron.romano@ford.com</a>	
Low Speed Pre-Ignition	Ron Romano – <a href="mailto:ron.romano@ford.com">ron.romano@ford.com</a>	
Sequence IVB	Teri Kowalski - <a href="mailto:teri.kowalski@tema.toyota.com">teri.kowalski@tema.toyota.com</a>	Hap Thompson
Sequence VIE	Charlie Leverett – <a href="mailto:charlie.leverett@intertek.com">charlie.leverett@intertek.com</a>	
Chrysler IIIH	Haiying Tang - <a href="mailto:HT146@Chrysler.com">HT146@Chrysler.com</a>	Terry Bates

**ASTM Section D02.B0.10  
Standards Acceleration**

**Scope and Objectives**

**Scope**

The section on Standards Acceleration maintains a staff of facilitators to expedite the establishment of standards relating to automotive lubricants. Facilitators' activities include upgrading test procedures to ASTM test methods, and revising standards as needed once they are adopted; the *Form and Style for ASTM Standards* to be followed in all cases.

Section 10 activities will include but are not limited to the following:

1. Determine priority among documents to be advanced to standards with the help of facilitators, based upon input from the appropriate subcommittee.
2. Evaluate and approve new facilitator candidates, as justified by the need for new facilitators.
3. Assign specific documents to selected facilitators.
4. Hear and evaluate the facilitators' reports presented at semiannual meetings of Committee D02. (Each facilitator's report shall be brief and shall include progress, problems, and costs related to his or her standards development activity.)
5. Assist the Test Monitoring Center in establishing funding for the Standards Acceleration Program.
6. Process revisions to D 4485, *Standard Specification for Performance of Engine Oils*.
7. Carry out any other activities relative to the Standards Acceleration Program as needed, or as directed by Subcommittee D02.B0.

**Objectives**

1. Report a summary to Subcommittee D02.B0 and to appropriate sections of the Standards Acceleration Program status, including actions for approval, at each semi-annual meeting of Subcommittee D02.B0.

**Date of last review: 6/13**

**ANNEXES**  
**(Mandatory Information)**

**A1. ASTM TEST MONITORING CENTER ORGANIZATION**

A1.1 *Nature and Functions of the ASTM Test Monitoring Center (TMC)*—The TMC is a non-profit organization located in Pittsburgh, Pennsylvania and is staffed to: administer engineering studies; conduct laboratory visits; perform statistical analyses of reference oil test data; blend, store, and ship reference oils; and provide the associated administrative functions to maintain the referencing calibration program for various lubricant tests as directed by ASTM Subcommittee D02.B0 and the ASTM Test Monitoring Board (TMB). The TMC coordinates its activities with the test sponsors, the test developers, the surveillance panels, and the testing laboratories. Contact TMC through the TMC Director at:

ASTM Test Monitoring Center  
6555 Penn Avenue  
Pittsburgh, PA 15206-4489  
www.astmtmc.cmu.edu

A1.2 *Rules of Operation of the ASTM TMC*—The TMC operates in accordance with the ASTM Charter, the ASTM Bylaws, the Regulations Governing ASTM Technical Committees, the Bylaws Governing ASTM Committee D02, and the Rules and Regulations Governing the ASTM Test Monitoring System.

A1.3 *Management of the ASTM TMC*—The management of the Test Monitoring System is vested in the Test Monitoring Board (TMB) elected by Subcommittee D02.B0. The TMB selects the TMC Director who is responsible for directing the activities of the TMC.

A1.4 *Operating Income of the ASTM TMC*—The TMC operating income is obtained from fees levied on the reference oils supplied and on the calibration tests conducted. Fee schedules are established by the TMB and reviewed by Subcommittee D02.B0.

**A2. ASTM TEST MONITORING CENTER: CALIBRATION PROCEDURES**

A2.1 *Reference Oils*—These oils are formulated or selected to represent specific chemical or performance levels, or both. They are usually supplied directly to a testing laboratory under code numbers to ensure that the laboratory is not influenced by prior knowledge of acceptable results in assessing test results. The TMC determines the specific reference oil the laboratory shall test.

A2.2 *Calibration Testing*—Full-scale calibration testing shall be conducted at regular intervals. These full-scale tests are conducted using coded reference oils supplied by the TMC. It is a laboratory's responsibility to keep the on-site reference oil inventory at or above the minimum level specified by the TMC test engineers.

A2.3 *Reference Oil Storage*—Store reference oils under cover in locations where the ambient temperature is between -10 °C and +50 °C.

A2.4 *Analysis of Reference Oils*—Unless specifically authorized by the TMC, do not analyze TMC reference oils, either physically or chemically. Do not resell ASTM reference oils or supply them to other laboratories without the approval of the TMC. The

**Comment [TB1]:** Suggest change of subtitle to one that is more descriptive. Annex A2 is addressed only at those using TMC services so it is not needed in subtitle.

reference oils are supplied only for the intended purpose of obtaining calibration under the ASTM Test Monitoring System. Any unauthorized use is strictly forbidden. The testing laboratory tacitly agrees to use the TMC reference oils exclusively in accordance with the TMC's published Policies for Use and Analysis of ASTM Reference Oils, and to run and report the reference oil test according to TMC guidelines. Additional policies for the use and analysis of ASTM Reference Oils are available from the TMC.

*A2.5 Conducting a Reference Oil Test*—When laboratory personnel are ready to run a reference calibration test, they shall request an oil code from the responsible TMC engineer via the TMC website.

*A2.6 Reporting Reference Oil Test Results*—Upon completion of the reference oil test, the test laboratory transmits the data electronically to the TMC using the ASTM Data Communications Committee Test Report Transmission Model (see Section 2— Flat File Transmission Format) available from the TMC. Upload files via the TMC's website. The TMC reviews the data and contacts the laboratory engineer to report the laboratory's calibration status. Report all reference oil tests, whether aborted, invalidated, or successfully completed, to the TMC.

A2.6.1 Report all deviations from the specified test method.

### **3. ASTM TEST MONITORING CENTER---MAINTENANCE ACTIVITIES**

*A3.1 Special Reference Oil Tests*—To ensure continuous severity and precision monitoring, calibration tests are conducted periodically throughout the year. There may be occasions when laboratories conduct a large portion of calibration tests in a short period of time. This could result in an unacceptably large time frame when very few calibration tests are conducted. The TMC can shorten or extend calibration periods as needed to provide a consistent flow of reference oil test data. Adjustments to calibration periods are made such that laboratories incur no net loss (or gain) in calibration status.

*A3.2 Special Use of the Reference Oil Calibration System*—The surveillance panel has the option to use the reference oil system to evaluate changes that have potential impact on test severity and precision. This option is only taken when a program of donated tests is not feasible. The surveillance panel and the TMC shall develop a detailed plan for the test program. This plan requires all reference oil tests in the program to be completed as close to the same time as possible, so that no laboratory/stand calibration is left in an excessively long pending status. In order to maintain the integrity of the reference oil monitoring system, each reference oil test is conducted so as to be interpretable for stand calibration. To facilitate the required test scheduling, the surveillance panel may direct the TMC to lengthen and shorten reference oil calibration periods within laboratories such that the laboratories incur no net loss (or gain) in calibration status. To ensure accurate stand or laboratory or both severity assessments, conduct candidate tests the same as reference oils.

*A3.3 Donated Reference Oil Test Programs*—The Surveillance Panel is charged with maintaining effective reference oil test severity and precision monitoring. During times of new parts introductions, new or re-blended reference oil additions, and procedural revisions, it may be necessary to evaluate the possible effects on severity and precision levels. The surveillance panel may choose to conduct a program of donated reference oil tests in those laboratories participating in the monitoring system, in order to quantify the effect of a particular change on severity and precision. Typically, the surveillance panel

requests its panel members to volunteer enough reference oil test results to create a robust data set. Broad laboratory participation is needed to provide a representative sampling of the industry. To ensure the quality of the data obtained, donated tests are conducted on calibrated test stands. The surveillance panel shall arrange an appropriate number of donated tests and ensure completion of the test program in a timely manner.

*A3.4 Intervals Between Reference Oil Tests*—Under special circumstances, such as extended downtime caused by industry-wide parts or fuel shortages, the TMC may extend the intervals oil tests.

*A3.5 Introducing New Reference Oils*—Reference oils produce various results. When new reference oils are selected, participating laboratories will be requested to conduct their share of tests to enable the TMC to recommend industry test targets. ASTM surveillance panels require a minimum number of tests to establish the industry test targets for new reference oils.

*A3.6 TMC Information Letters*—Occasionally it is necessary to revise the test method, and notify the test laboratories of the change, prior to consideration of the revision by Subcommittee D02.B0 . In such a case, the TMC issues an Information Letter. Information Letters are balloted semi-annually by Subcommittee D02.B0, and subsequently by D02. By this means, the Society due process procedures are applied to these Information Letters.

*A3.6.1 Issuing Authority*—The authority to issue an Information Letter differs according to its nature. In the case of an Information Letter concerning a part number change which does not affect test results, the TMC is authorized to issue such a letter. Long-term studies by the Surveillance Panel to improve the test procedure through improved operation and hardware control may result in the issuance of an Information Letter. If obvious procedural items affecting test results need immediate attention, the test sponsor and the TMC issue an Information Letter and present the background and data supporting that action to the Surveillance Panel for approval prior to the semiannual Subcommittee D02.B0 meeting.

*A3.6.2 COTCO Approval*—Authority for the issuance of Information Letters was given by the Committee On Technical Committee Operations in 1984, as follows: “COTCO recognizes that D02 has a unique and complex situation. The use of Information Letters is approved providing each letter contains a disclaimer to the affect that such has not obtained ASTM consensus. These Information Letters should be moved to such consensus as rapidly as possible.”

*A3.7 TMC Memoranda*—In addition to the aforementioned Information Letters, supplementary memoranda are issued. These are developed by the TMC and distributed to the appropriate surveillance panel and participating laboratories. They convey such information as batch approvals for test parts or materials, clarification of the test procedure, notes and suggestions of the collection and analysis of special data that the TMC may request, or for any other pertinent matters having no direct effect on the test performance, results, or precision and bias.

#### **A4. ASTM TEST MONITORING CENTER: RELATED INFORMATION**

*A4.1 New Laboratories*—Laboratories wishing to become part of the ASTM Test Monitoring System will be requested to conduct reference oil tests to ensure that the laboratory is using the proper testing techniques. Information concerning fees, laboratory

**Comment [TB2]:** Suggest this is subsection of A3.6 rather than a new section.

**Comment [TB3]:** Suggest the COTCO approval section is better part of section A3.6 rather than in a separate section A4.2 as in previous draft. This keeps all matters relating to Info Letters in one place, i.e. in A3.6

inspection, reagents, testing practices, appropriate committee membership, and rater training can be obtained by contacting the TMC Director.

*A4.2 Precision Data*—The TMC determines the precision of test methods by analyzing results of calibration tests conducted on reference oils. Precision data are updated regularly. Current precision data can be obtained from the TMC.

*A4.3 Test Stands Used for Non-Standard Tests*—If a non-standard test is conducted on a previously calibrated test stand, the laboratory shall conduct a reference oil test on that stand to demonstrate that it continues to be calibrated, prior to running standard tests.