

Technical Guidance Committee Report

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Boston, MA

TGC Meetings Conducted This Reporting Period

- The TGC conducted a meeting on December 7, 2016 at Lake Buena Vista, Florida during ASTM meeting week.
- A conference call/WebEx was conducted on June 13, 2017.

Accomplishments this Reporting Period

- During the June 13, 2017 TGC Conference call, the group approved the document entitled “ASTM Sub Committee B Test Availability Guidelines”.
 - Document states that a test is available for ASTM TMC purposes as long as one lab (dependent or independent) is able to run the test.
 - TMC has a link to this document on the TMC Website.
 - Document includes the notification process that will be used in the event that a test is unavailable and a distribution list that includes the email addresses for the key stake holders that should be notified in the event of a test availability concern.

ASTM Sub Committee B Test Availability Guidelines

BACKGROUND

The ASTM Technical Guidance Committee has approved the following guidelines to assist surveillance panels in the notification of when a specific test may be available or unavailable for testing purposes. The intent is that all stake holders are informed in a timely manner of any possible continuation/disruption in test availability.

GUIDELINES

Each surveillance panel is responsible for ensuring adequate supplies of acceptable test components, fuel, or any other item necessary to conduct a test. If a condition arises that would prevent a laboratory from procuring materials to conduct a registered or reference oil test, the surveillance panel chairman should be notified immediately. The surveillance panel is to then meet and discuss possible redistribution of the resource, alternative suppliers, etc. to help resolve the procurement issue. If no resolution is found the surveillance panel chairman is to inform at a minimum the stake holders shown below under the heading notification list. It is hoped in situations when a test is facing a shortage of material(s) that immediate notification can focus industry expertise on finding suitable replacements and or develop/initiate protocol to handle approval of oils. In the case of sole-source/critical parts, it is advisable that the surveillance panels establish an equivalency testing protocol in anticipation of the event that material can no longer be procured. If material procurement conditions change enabling a registered or reference oil test to be run the surveillance panel chairman is to also immediately notify stake holders.

For ASTM Test Monitoring System purposes a test is deemed available as long as one calibrated laboratory (independent or dependent) is able to run tests.

Notification List

Organization	Position
ASTM	D02.B0 Chairman
	Test Monitoring System Executive Committee Chairman
	Test Monitoring Center Director
	PCEOCP Chairman
	HDEOCP Chairman
	D02.B0.01 Chairman
	D02.B0.02 Chairman
	D02.B0.03 Chairman
	D02.B0.07 Chairman
	Membership of Effected Surveillance Panel
ACC	Product Approval Protocol Task Group Manager
	MAAG Chairman
API	EOLCS Manager
	EOLCS Chairman
Auto Alliance	
JAMA	
EMA	EMA Staff
API	AOAP Chairman
API	DEOAP Chairman
ACC-MA	Manager

Notification

From the TMC website (<http://www.astmtmc.cmu.edu/TestStatusNotification.aspx>) a notification email can be generated with the current notification member emails. Surveillance Panel Chairs will need to append a letter describing the situation using the current D02 letterhead (a link is on the TMC notification page) and a notification comment to the body of the email prior to sending.

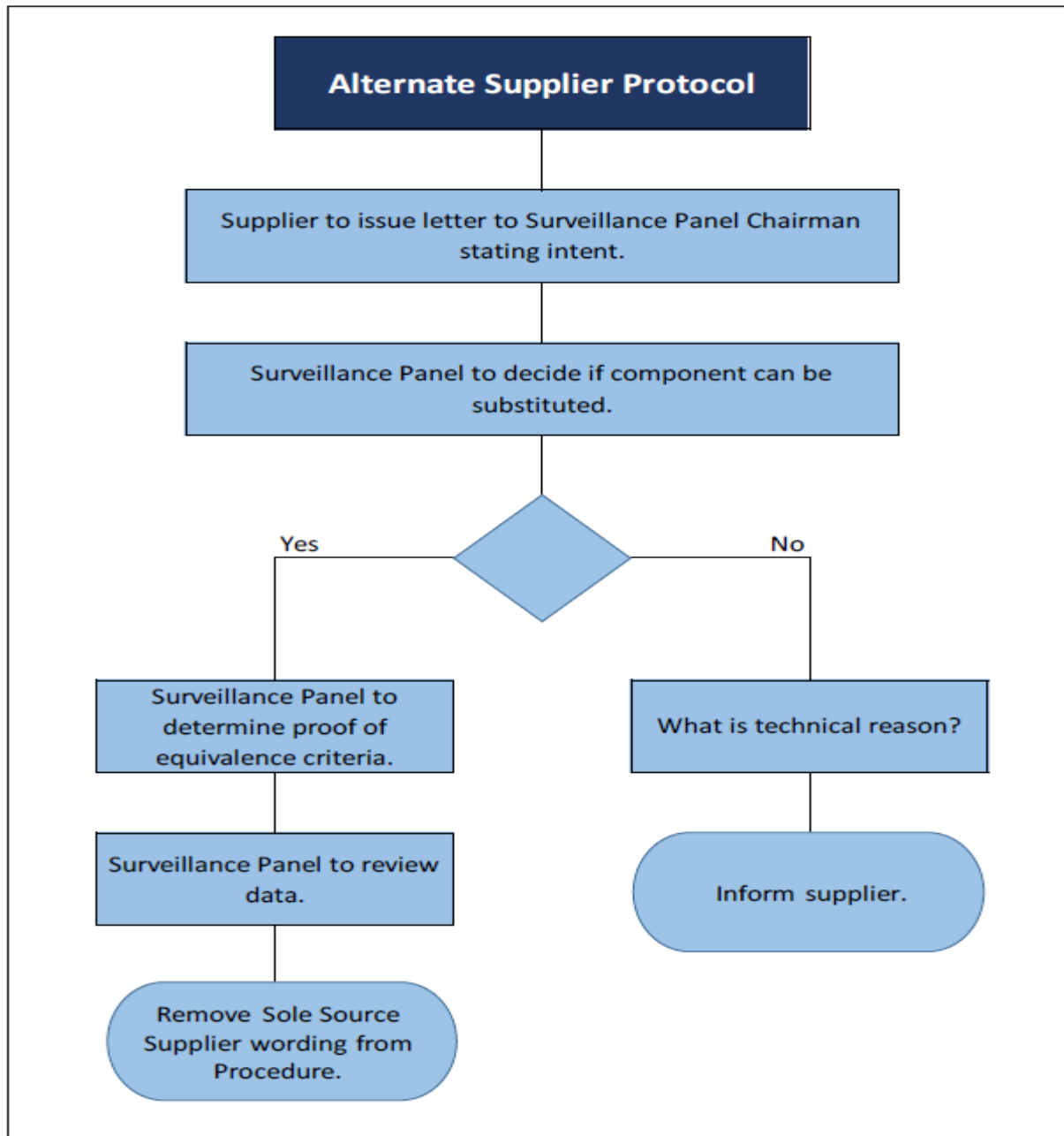
Material Substitution/Alternate Supplier Protocol

- Extensive review of the “Facts for Members” document as it relates to replacement of non-generic equipment/alternate suppliers.
 - Document encourages the development of test methods based on generic equipment.
 - Also encourages a clear process for later incorporation of additional equipment if it becomes available and is shown to be equivalent.
 - Refers to standard ASTM Methods for establishing precision and bias to determine equivalency.
 - Document does not offer any testing methodology for the determination of equivalency.

Material Substitution/Alternate Supplier Protocol (cont'd)

- The LCTWG sent request to TGC on December 5, 2016 requesting that a search for historic examples of non-generic parts introductions be summarized with the goal of extracting some general guidelines/best practices that could be used for replacement of non-generic equipment.
- SwRI compiled a document with several examples and distributed it by email on March 22, 2017 to the TGC membership group for review.
- Lengthy discussion during the June 13th conference call on feasibility of creating some generic wording on the how to introduce non-generic equipment from an alternate supplier.

Table 1



Material Substitution/Alternate Supplier Protocol (cont'd)

- The panel agreed that it would be difficult to come up with wording that would cover all scenarios.
- The compromise would be to establish some “boiler plate” wording that could potentially be put in all test procedures that would essentially guide a potential supplier through the process.
- Action: TGC Chairman to come up with initial draft of wording and distribute to the group for review.

Rating Task Force

- Bob Campbell of Afton has accepted the chairmanship of the Rating Task Force (Thanks to Bob and Afton!)
- Two conference calls were held:
 - May 25, 2017: initial call to discuss membership and objective of the task force. Some proposed objectives discussed:
 - Maintain standardization between raters and labs
 - Address rating issues relative to new test types for GF-6
 - Support Surveillance Panel needs
 - Conduct pre and post workshop discussions to ensure needs are met and work towards continuous improvement
 - Maintain rating methods in conjunction with ASTM

Rating Task Force (cont'd)

- June 9th a second conference call was held.
Some highlights:
 - Revisit the minimum number of target raters required for establishment of rating targets at the start of each workshop.
 - Attempt to carry a piston across workshops to compare current ratings with past.
 - Motion made to use 0.10 as the minimum standard deviation (previously 0.05) for the upcoming HD workshop (passed unanimously).
 - Include DD13 rating as part of the HD workshop.

Fuel Task Force

- Jim Matasic of Lubrizol is the Fuels Task Force Chairman.
- Several conference calls were held during this reporting period.
- Jim will present a separate report.

Scope and Objectives

The Technical Guidance Committee is a standing committee under the ASTM Test Monitoring System Executive Committee. The TGC shall consist of the chairmen of the surveillance panels of monitored tests, a representative of each of the test developers/sponsor who are responsible for the test procedures and the Director. The Technical Guidance Committee will advise the Director in technical matters concerning test procedures.

This will involve working with the surveillance panels, test developers, critical parts suppliers, fuel suppliers and testing laboratories across all testing types to improve the repeatability and reproducibility of the test procedures. The TGC will provide guidance for future test developments. Additionally, the TGC chairman will liaise with the ACC PAPTG Chair.

Objectives:

- 1) Develop guidelines for issues that are potentially common to all HD/PC engine, gear and bench testing.
- 2) Work with the Rating Committee to provide guidance for issues related to visual deposit ratings.
- 3) Provide guidance on best practices for critical component identification within test procedures.
- 4) Continue to refine the “Guide for Test Development” document as new categories are developed.

What's Next

- Next meeting scheduled for June 28th from 1:00 to 3:00 PM here in Boston.
 - Main topic of discussion will be to come up with a proposal for the wording that could be used in ASTM test procedures that will identify the approval process of non-generic equipment from alternate suppliers.