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C&S Connect Version 4.0 Summary of Updates

Effective as of December 20, 2013

1 Out of Cycle Recirculation Ballots

We created a process that allows for Standards Committee Recirculation ballots after the Board Procedural Review Ballot has been completed. This allows Standards Committees to approve minor proposal revisions made as a result of a Board Procedural Review comment or to address an ANSI public review comment, without issuing a new first consideration Standards Committee ballot as is our current practice.

Creating the new Out of Cycle Recirculation process:

- Allows carry over all votes from the previous standards committee ballot
- Ensures that a vote changes only in light of a comment or new change to the proposal
Prevents the previously approved part(s) of the proposal from being opened to vote.

This addition does not change the current recirculation practices, or numbering, it just allows for the recirculation of a Standards Committee ballot after a Board ballot has been issued.

Staff Secretaries are now able to recirculate a record marked as “Standards Committee Recirculation Required” by searching for either the most-recent Standards Committee Ballot number, or the record number. Once the record has been standards committee approved, it will go out on a new Board Procedural ballot (with a new ballot number) as if this is the first time the board is seeing the record.

A new button was added on the standards committee ballot that is now eligible for Out of Cycle Recirculation. This new “View Board Ballots/Comments” button links users to the Board Ballot with outstanding comments/negatives that necessitated the recirculation.

2 Unanimously Approved Items (aka Administratively Board-Approved Items)

CS Connect now provides a way for records that have been unanimously approved by a Standards Committee to be moved to a record level equivalent to a Board Approved level without going out on a Board Procedural ballot. These changes were implemented to ensure CS Connect is in accordance with Rev 13 of the ANSI Accredited Procedures 7.2.6 which states:

- Standards actions without any unresolved consensus committee disapproved votes, substantive supervisory board comments, or public review objections may be administratively approved, at the option of the individual board, by delegating the board's responsibility for procedural review. Such review and declaration of administrative approval may be accomplished by responsible ASME staff or by a board-appointed review group, with no formal recorded vote of the board required. Such administrative approvals shall be provided in list form to the responsible board in their meeting agenda for information.

It is recommended that a new "Administratively Board Approved" record level be made available only to Staff Secretaries for the Board-Level Committees.

When a record needs to be updated to this record level, Standards Committee Staff Secretaries will send a manual email notification (outside of C&S Connect) to the Staff Secretary of the respective Board. This email will notify the Staff Secretary for the Board that a record needs to be updated to "Administratively Board Approved". The Staff Secretary for the respective Board will then update the Record Level to Administratively Board Approved.

3 Board Multi-select(Staff Function)

C&S Connect is currently built to only allow one Board to be selected in "related committees" and once a record is "Board Approved" it is locked. But, technical Boards report to the Boards on Code and Standards Operations, which means that some items need to be approved by two boards. The system was updated to allow for a record to be balloted consecutively by both Boards selected under **Committees Involved in This Record**.

4 Codes & Standards PDFs Update

CS Connect Committee Central "Codes & Standards" PDFs page needs to be updated so that the displayed number for the PDFs matches what the number of actual files that the user sees. The PDF tally is currently inflated because it is also counting old versions of the files. The number of files shown here varies from user to user depending on what access has been granted to the committees he/she belongs to.

5 Committee File Sharing Sort Update

The "Committee File Sharing" page was updated to allow C&S Connect users to sort by the File Description, Uploaded By, Date and Uploaded columns. Users are able to click the top of each column to toggle between:

- Sorting the File Name and Uploaded By columns by alphabetical order (A – Z), and reverse alphabetical order (Z – A).
- Sorting the Date Uploaded by chronological order (newest – oldest) and reverse chronological order (oldest – newest)

6 Export Comments and Responses

We added a button on the ballot form that allows volunteers to download/export all comments and responses as a word document so that they can prepare responses outside of the system.

In addition to the export comments and responses changes, the Post Response form has been updated so that when a Project Manager responds to a comment, that comment is date-stamped, and locked. This improvement prevents previous comments from being written over, and maintains the integrity of the responses.

7 Project Manager Notification for Vote Change

The Project Technical Manager will receive a notification when a C&S Connect user changes a vote from Approved w/ Comment to Disapproved.

8 Vote Review Warning Message on Recirculation Ballots

The “Vote on Ballot” form for recirculation ballots (which is actually the “Vote Review” form) clearly states now that the vote has been carried over from the previous ballot, and the volunteer has not yet voted on this ballot.

9 Supporting Material (RC Ballots)

For recirculation ballots, the Supporting Material File is available as a link on the “Vote Review Form” so that the voters have easy access to this document.

10 Receive a Copy of Your Ballot by Email Default to Checked

User research has confirmed that most users choose to receive a copy of their ballots by email when submitting votes. Thus the checkbox for “Do you want a copy of this ballot by e-mail” on the “Vote Review” form defaults to being checked. Members who do not want to receive this email – the minority of users – can uncheck this box.

11 Tooltips

We added Tool Tips to the Staff Tab, New Component Record Form, New Entire Document Record Form, Update Component Record Form, and the Update Entire Document Form.

The Symbol for these Tool Tips is a “?” that links to the Tool Tip. When the user clicks on the “?” a pop up will appear with the related tool tip. Tool tips are short explanations of the various system features.

12 Interpretations

The Inquiry submittal was automated through an online form. The submittal form is a public-facing page that is housed in C&S Connect. Inquirers will complete the form, and the information from that form will be translated into a new C&S Connect records.

The C&S Connect interpretations record form was updated to capture information from the online submittal form. Improvements were made to the interpretations ballot to combine the two different approval methods, cognizant committee vote and special committee vote, onto one form.

Once an interpretation is approved it will be archived in a new database that volunteers, ASME staff and the public will have access to search. This new database will replace the physical publication of interpretations. It will also consolidate access to interpretations from various C&S Connect and asme.org web pages into one central location.

For the purpose of this project, historical interpretation records are defined as all interpretation records that are in the system at the time this project is implemented regardless of their approval/publication status. All historical interpretations (the issued interpretations) will be brought into the database as part of the manual data entry part of the project **(to be implemented at a later date)**. This will ensure consistent entry for all historical interpretations.

13 Advanced Search Update

To make searching for ballots easier, additional search fields were added on the Advanced Ballot Search screen, which appears once you highlight Ballot and click on the Open button under the Advanced Search heading on the Search tab.

- An option to search for a Ballot Status, using a “Ballot Status Open Checkbox”
- The option to search according to a date range for both open and closed ballots using the From: MM/DD/YY format, and the To: MM/DD/YY format.

In addition, these columns were also added to the Ballots search results page.