



Document Project Manager (DPM) Guidelines and Checklist

These guidelines provide an overview of the process the DPM should follow in developing an AMPP consensus document as well as guidance on the responsibilities of the DPM and AMPP staff.

Legend/Explanation of Symbols

- A checkbox indicates an action that the DPM is required to perform.
- An arrow indicates “for information” – typically describing the process or explaining an action performed by staff.

Joining the SC

- In order to serve as a DPM, you must join the Standards Committee (SC) responsible for your assigned project.

Starting the Project

- Complete the Project Request Form to initiate a “new” project (any SP, MR, TM, Guide, or TR that has not been previously published).
 - Revisions, reaffirmations, and stabilizations of previously published documents do not require completion of the Project Request Form.
 - The Project Request must include a clear rationale statement and scope. A project will not be approved without the required information.
 - After a new document project is approved,
 - a document project designation is assigned,
 - the new project is announced to the SC,
 - the DPM receives an email notification, and
 - a Workspace page for your AMPP Project Team is created.
 - Business Development staff will reach out to you to schedule a DPM Orientation for a new project. For revisions, reaffirmations, and stabilizations, the Staff Liaison may provide an orientation upon request.

Obtaining Your Working File

- The Staff Liaison will provide the appropriate document template for draft development of a new document and post in your Project Team Workspace.
- For revisions, reaffirmations, and stabilizations, the Staff Liaison will post the most recent version in draft format on the AMPP template for the Project Team.

Developing and Editing the Document

- Work with the Project Team to gather data and develop draft document content.
 - AMPP staff can assist with scheduling virtual calls as needed.
 - DPMs are also permitted to arrange their own calls if they have the capability.
 - Please include your Staff Liaison on the meeting invitation.

- ☐ Please ensure that the following items are completed before submitting to AMPP staff for balloting:
 - ☐ All new and revised documents must include a Scope and a Rationale.
 - ☐ List all Referenced Standards and Other Consensus Documents in the table as indicated in the template that are cited in the body of the document. All other references should be numbered and listed at the end of the document in the Other Referenced Documents section. Verify that the information is correct and current.
 - ☐ Ensure Auto Numbering is NOT being used throughout the document.
 - ☐ Review formatting – verify sections and paragraphs are numbered correctly. Do not adjust styles or margins.
 - ☐ Make sure proofing language is in United States English. Run a spelling and grammar check in Word.
 - ☐ For standards, ensure directive language is used (shall, should, must, may), not vague or indirect. For reports, ensure directive language is not being used. See text box on the draft template near Section 1 for further details.
 - ☐ Verify terms in Definitions section are consistent with NACE/ASTM G193 Standard Terminology and Acronyms Relating to Corrosion and SSPC definitions.
 - ☐ Verify Tables/Figures/Images have been:
 - cited sequentially, have titles, numbered correctly, captions are correctly formatted,
 - saved and accompanied by original versions of imported photographs, images, graphs, etc. along with the Request for Permission Form from any copyright holder. Provide your staff liaison with originals and completed copies of all copyright permission forms.
 - ☐ Check equations for formatting and numbering.
 - ☐ Verify any additional reference footnotes and add website url if available. Do not include footnotes for Standards Development Organizations (they are listed in Referenced Standards and Other Consensus Documents).
 - ☐ Verify that Appendixes are cited sequentially in text and labeled as mandatory or nonmandatory.
 - ☐ Provide keywords and industries that apply to this publication to your staff liaison.

Note: The AMPP Style Manual is located on the Standards Resources page on AMPP.org. This will be your guide to outlining and formatting the document.

Starting a Committee Ballot

- Once you feel that the document is ready to be balloted to the Standards Committee (SC), submit the document draft to the AMPP Staff Liaison.
 - AMPP Staff will review the draft for formatting and editorial. You may be contacted with questions or suggestions to clarify language.

Adjudicating Closed Committee Ballots

- Once your ballot has gone through the review period of 28 days (or 14 days, if applicable), you will receive a notification from Workspace that the ballot has closed. The email contains a direct link to view the ballot.
- AMPP Staff will provide a summary of the ballot results and comments from the ballot.
- Review the summary of the ballot. All comments must be addressed in accordance with the Standards Committees Operating Manual, Paragraph 6.3.5. and submitters must receive written responses to their comments. Negative votes and comments must be adjudicated before they can move on to the next level of approval. Adjudication of comments means that the DPM has reviewed all comments and has attempted to resolve them. It does not mean that all comments must be accepted; however, the reasons for not accepting unresolved negatives must accompany the next round of balloting.
- All changes resulting from the disposition of comments must be tracked on a clean Word version of the draft provided by the staff liaison, utilizing the Track Changes feature and reballoted, except for minor editorial errors.
 - If there are 5 or more technical changes, a 28-day reballot should be initiated. In cases where there are less than 5 technical changes, a 14-day affirmation ballot can be initiated.

Submitting for Standards Program Committee (SPC) Ballot and Final Formatting

- Once all committee level balloting is complete, please submit the final draft to your Staff Liaison for the SPC ballot and final formatting.
- Submit the comment spreadsheet and any ballot comment forms documenting all comment adjudication and negative resolutions to your Staff Liaison.
- If comments are received from SPC, Staff will contact the DPM to determine the next action.

Publishing after SPC Ballot

- If no comments are received from the SPC ballot, AMPP Staff will automatically publish the document.
 - A notification will be emailed to the SC and DPM upon publication of the document.

Congratulations — your AMPP Standard has published!