

Instructions for PC Chairs - How to take Comments Offline and Send Responses to Commenters (and other options available to the Chair)

1. Go to the online comment database at <https://osr.ashrae.org/default.aspx>. **NOTE:** Please see the *Instructions for Project Committee Members* for additional information on how to login to the online comment database and how to process public review comments (<http://www.ashrae.org/standards-research--technology/public-review-drafts>). The instructions provided in this document are in addition to those instructions for PC members.
2. Select “My Comments” from the menu at the left and log in to the online comment database. Use the drop down menus at the top of the My Comments page to find the public review draft of interest. From the first drop down menu select the public Review Period for the applicable draft document. In the next drop down menu select your applicable project Committee. And finally from the last drop down menu select the public review draft Document of interest.
3. Under the My Committee Comments column on the My Comments page you can now see the comments and responses for the document selected in the drop down menus. Under the “Response In Progress” column at the right you can see how many Draft Responses there are as well as how many responses are Ready for Approval, Approved, or Sent. All of the categories listed under the My Committee Comments column are filters and the filter results show up at the bottom of the My Comments page (same page). The filter selection shows up in **RED** when a filter category is selected. See example below for Standard 147-2002R.

The screenshot shows the 'My Comments' page for the document 'BSR/ASHRAE Standard 147-2002R, Reducing the Release of Halogenated Refrigerants from Air-Conditioning Equipment and Systems (Second Public Review Draft)'. The page includes a navigation menu on the left, a main content area with instructions and draft comment warnings, and a summary section with three columns of statistics: 'My Comments', 'My Committee Comments', and 'Response in Progress'. Below the statistics are buttons for 'Batch Updates', 'Send Responses', 'Take Comments Offline', and 'Upload Offline Comments'. At the bottom, there is a list of comments with columns for 'Document' and 'Comment Title'.

My Comments		My Committee Comments		Response in Progress	
Drafts in Progress	0	Total Comments Submitted:	37	Response in Progress:	0
Comment Drafts:	0	Substantive:	18	Draft Responses:	0
Reply Drafts:	0	Supportive (Resolved):	19	Ready for Approval:	0
Total Comments Submitted:	0	By Comment Status:		Approved (but not yet sent):	0
Substantive:	0	New-Submitted:	17	Sent (No Reply Received):	0
Supportive (Resolved):	0	New-Submitted Late:	1	Distinct Commenters:	9
By Comment Status:		Withdrawn:	1		
New-Submitted:	0	Deadline Lapsed (Resolved):	0		
New-Submitted Late:	0	Responded To (Total):	0		
Withdrawn:	0	Accepted:	0		
Deadline Lapsed (Resolved):	0	Rejected:	0		
Responded To (Total):	0	More information is needed:	0		
Accepted:	0	Deferred, Out-of-Scope:	0		
Rejected:	0	Deferred, Late:	0		
More information is needed:	0	Replied To (Total):	0		
Deferred, Out-of-Scope:	0	Ok-Resolved:	0		
Deferred, Late:	0	Not Ok-Resolved:	0		
Replied To (Total):	0	Unresolved:	0		
Ok-Resolved:	0				
Not Ok-Resolved:	0				
Unresolved:	0				

Buttons: [Batch Updates](#) [Send Responses](#) [Take Comments Offline](#) [Upload Offline Comments](#)

1 - 37 of 37 | Expand All | Collapse All | Turn Column Resizing On | Results per page: 100

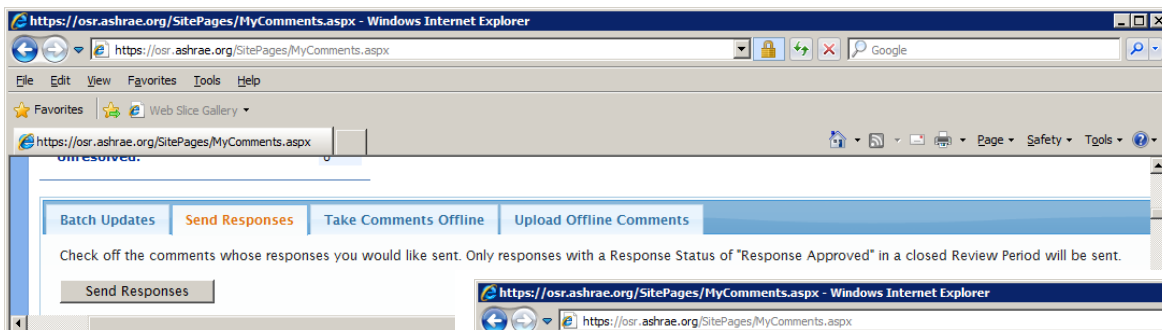
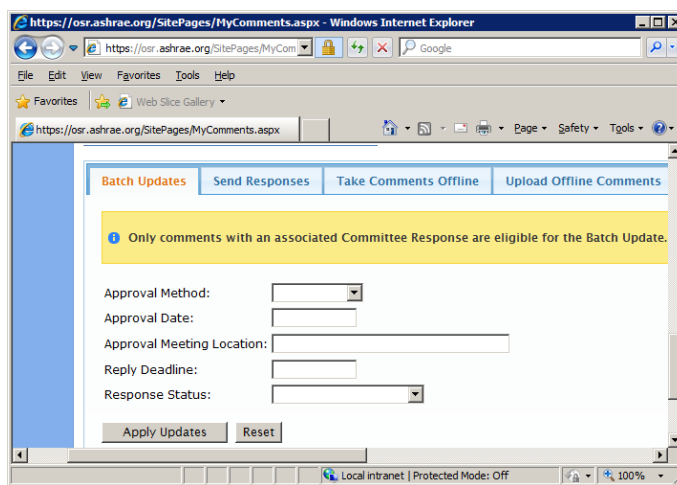
Document	Comment Title
45-Day Public Review Period from May 13, 2011 to June 27, 2011	
Details BSR/ASHRAE Standard 147-2002R, Reducing the Release of Halogenated Refrigerants from Air-Conditioning Equipment and Systems (Second Public Review Draft)	Leak Definition, Leak Tightness for Mfg. and Cumulative Leak Test Method (Mfg.)

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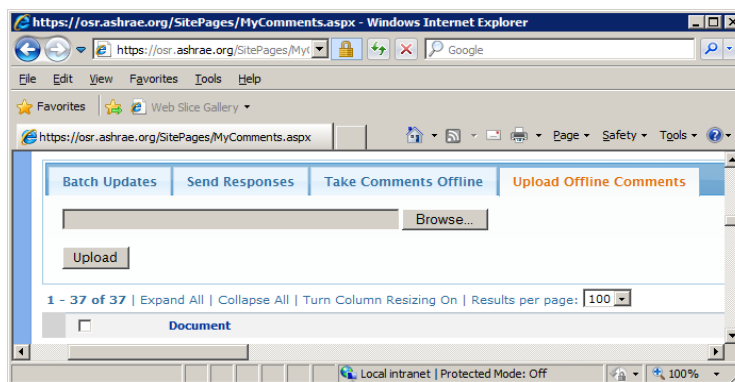
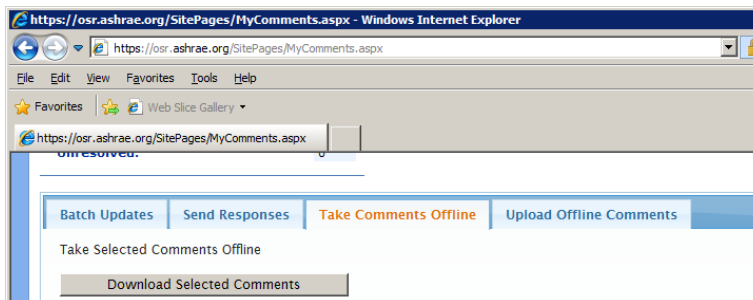
4. The Chair of the responsible project committee has additional menus available on the My Comments page. There is a menu bar in the middle of the page (just above the filter results) that allows the Chair to Batch Update response approvals, Send Responses, Take Comments Offline, and Upload Offline Comments. This menu bar is ONLY available for Chairs.

Batch Updates allows the Chair to update multiple responses with the committee approval information. However, batch updates can only be used when there is a draft response in the online system.

The Chair is able to send approved responses to commenters provided the public review period has closed AND the response is in the “Response Approved” status.



The Chair has the ability to “Take Comments Offline” and save them as a Word document (.docx format). The Word doc is a table of selected (filtered) comments that can be edited, saved and uploaded back into the online system. In other words, it’s a method of drafting responses to comments when there is no internet access (access to the online comment database).

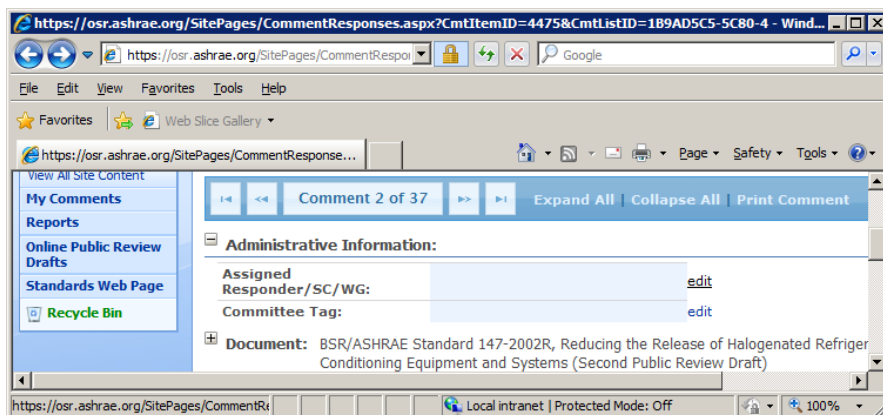


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5. Other options available to the Chair:

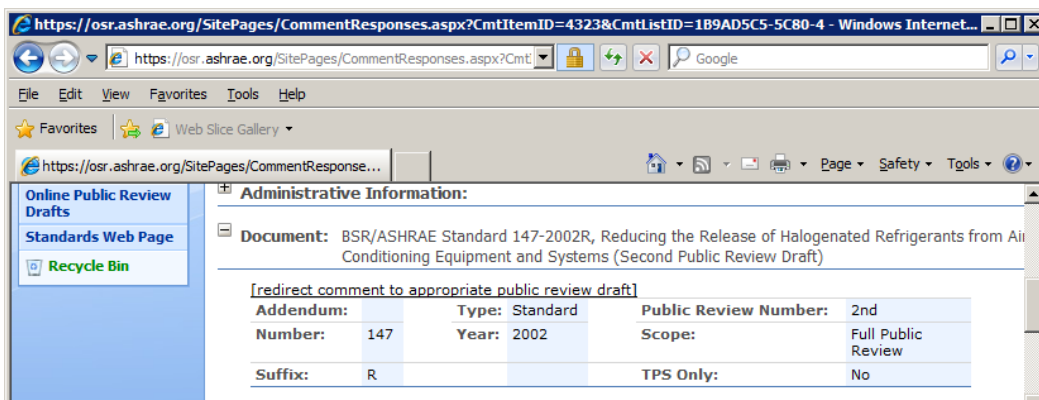
- The Chair is able to assign a comment or comments to a particular committee members, a subcommittee or to a working group.
- The Chair is able to assign a comment or comments a Committee Tag. A Committee Tag can be anything the Chair desires to differentiate comments or to help group or sort comments (e.g., section number, table, figure). In cases where the commenter has incorrectly identified the information they are commenting on the Chair can add the correct information in this field.

These options are available on the comment Details page under Administrative Information and shows up in one of the columns in the filter results on the bottom of the My Comment page.



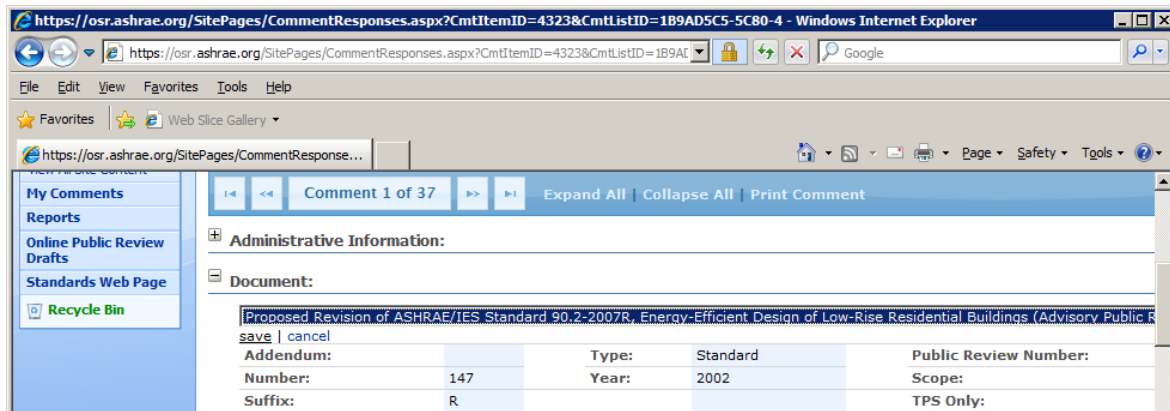
- The Chair is able to redirect a comment to the appropriate draft when a commenter submits a comment but to the incorrect draft. In some instances several public review drafts are posted for review and comment and they are identified similarly, e.g., Addendum r to 90.1-2010 and Addendum r to 62.2-2010. In some cases commenters have submitted comments on one draft when they intended to submit it on another draft posted for review and comment at the same time. In these cases the Chair has the ability to move the comment from one draft to another.

This option is available to the Chair on the comment Details page just below the Administrative Information and Document. There is a link titled “[redirect comment to appropriate public review draft]”. See example for 147-2002R below.



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When the link is selected a drop down menu appears. The drop down menu shows all draft that were posted for public review during the same public review period. The Chair can then select a draft from the list and select “save”. See example below.



6. There are a couple of methods for drafting, approving and sending responses that are available to the Chair. The first method is to enter draft responses directly into the comment Details page. This method is available to ALL project committee members. First select the filter category for which you would like to view the comments. “Total Comments Submitted” is the total of all “Substantive” and “Supportive (Resolved)” comments. Supportive comments do not need to be responded to. Commenters for Supportive comments are automatically listed as “Resolved-Supportive” in the online comment database. This is not to say the committee shouldn’t review the Supportive comments as they may include some good suggestions related to the public review draft. The filter results will be listed at the bottom of the page.

From the filter results at the bottom of the My Comments page select “Details” next to the applicable comment for which you would like to enter a draft response. If there is already a draft response in the online comment database click “Edit” next to the draft response on the comment Details page. The “Edit” button will appear as long as the response has not been sent to the commenter. This method is the same method that is available to all project committee members. See the *Instructions for Project Committee Members* posted at <http://www.ashrae.org/standards-research--technology/public-review-drafts> for further information.

7. The second method for drafting responses is to download the comments in a Word document (.docx format), edit the Word document by adding responses to the comments, and then uploading that revised Word document back into the online comment database. Response fields are then automatically updated online.

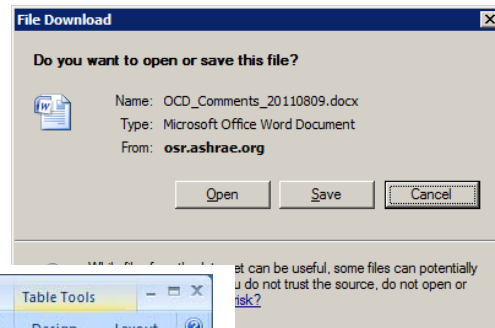
The first step in this process is to select which comments you would like to download using the filters in the My Committee Comments column of the MY Comments web page. The filter results will appear at the bottom of the page. The Chair can elect to download all the comments in the filter results or just only those selected using the check boxes. See below.

Online Comment Database –

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After selecting the applicable comments to download click on the “Download Selected Comments” button and save the Word document on your computer. After the document has been saved to your computer you are free to edit it by adding draft responses, etc. to the Word document. The Word document is in table format and includes the comment information and text.



COMMENT	
Comment Key	4511
Cmnter Number	0003
Cmnt Number	001
Document	BSR/ASHRAE Standard 147-2002R, Reducing the Release of Halogenated Refrigerants from Air-Conditioning Equipment and Systems (Second Public Review Draft)
Review Period	45-Day Public Review Period from May 13, 2011 to June 27, 2011
Committee	SPC147
Comment Title	Isolation Valves
Section Type	Clause
Section Number	4.6
Supportive	No
Comment Text	<p>4.6 Isolation Valves. Isolation valves shall <u>meet the requirements of Section 6.2.1</u> and comply with one of the following:</p> <p>4.6.1 The valve stems are sealed by internal diaphragm.</p> <p>4.6.2 The valve has a spindle, with a tethered cap .</p> <p>4.6.3 The valve meets the requirements of Section 6.2.1.</p>
Associated Reference	No Attachments

It does not include any attachments that may have been included by the commenter. Attachments must be downloaded separately from the comment Details page for the applicable comment.

The Word document identifies each comment using a “Comment Key”. This Comment Key is used to identify the comment when it is uploaded back into the online system. It

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is also used to identify errors in the uploaded document.

Administrative Information (Committee Tag and Assigned Responder/SC/WG) is included in the Word document if that information was added by the Chair previously. There is also an area for “Committee Notes”. This is information that can be included in the Word document and online to help the committee in keeping track of the comments and changes that might be need to the existing public review draft.

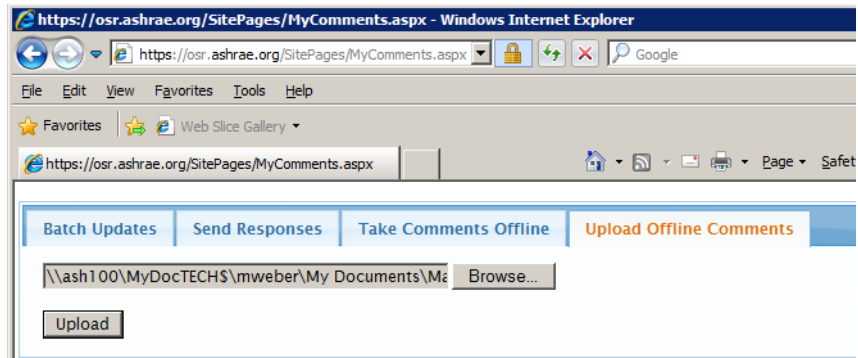
Areas in the Word document that are shaded cannot be changed; only the committee response information can be added. Below is the information that can be added to the Word document offline, saved and then uploaded back into the onlince comment database at a later date. Boxes are meant to be checked with an “X”. Only one box can be checked in each category or an error will occur when the document is uploaded. Some or all of the fields can have information added. It is not required that all fields have information added. Only the fileds with added information will be uploaded back into the system when the Word document is uploaded. The Response Text fields will retain its formatting (underline and strikethrough, highlighting, etc.) when it is uploaded back into the system and text can be cut and pasted into the fields below.

COMMITTEE RESPONSE	
Committee Notes	
Change Type	<input type="checkbox"/> None <input type="checkbox"/> Editorial <input type="checkbox"/> Substantive
Resolution Potential	<input type="checkbox"/> No contact required <input type="checkbox"/> Contact required <input type="checkbox"/> Contacted, likely resolved <input type="checkbox"/> Contacted, likely unresolved
General Notes	
Committee Response	
Response Status	<input type="checkbox"/> Draft <input type="checkbox"/> Ready for Approval <input type="checkbox"/> Response Approved
Approval Date <i>Enter date formatted as mm/dd/yyyy</i>	
Approval Method	<input type="checkbox"/> PC Meeting <input type="checkbox"/> Letter Ballot

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Approval Location	
Committee Response	<input type="checkbox"/> Accepted as submitted <input type="checkbox"/> Accepted with minor changes <input type="checkbox"/> Accepted in principle <input type="checkbox"/> Rejected except as noted <input type="checkbox"/> Rejected <input type="checkbox"/> More information is needed <input type="checkbox"/> Deferred, Out of Scope <input type="checkbox"/> Deferred, Late
Response Text	
Response Sent* <i>Do not edit.</i>	
Reply Deadline <i>If left blank, the 'Reply Deadline' will be set to 30 days from when the response has been sent.</i> <i>Enter date formatted as mm/dd/yyyy.</i>	

Once response information has been added to the Word document offline the Word document can be uploaded back into the online system by selecting “Upload Offline Comments” from the menu bar, browsing to the applicable document and clicking the “Upload” button.



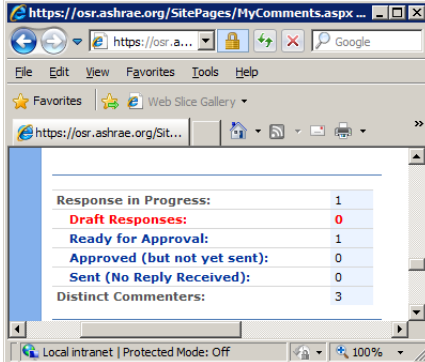
NOTE: If the online version of the response has changed since the comments were downloaded (e.g., a committee member has entered a draft response or changed that status of a response online) an error will occur when the document is uploaded. If errors occur they will be identified with the “Comment Key” number located at the top of each downloaded comment. When errors are encountered only those identified with a Comment Key number will be prevented from being uploaded, all other

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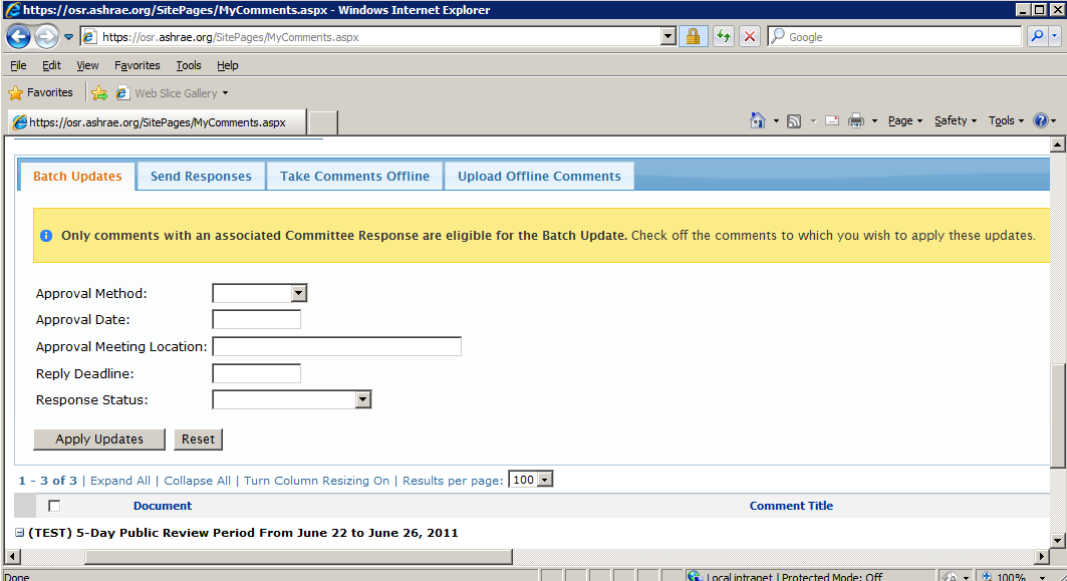
comment responses will be uploaded successfully into the online system. In those cases where an error results the Chair will have to enter those responses individually online by going to the applicable comment Details page.

8. To Batch Update multiple responses with the committee approval information select the applicable comments that you want to update from the filter categories on the My Comments page. Remember, only comments with committee responses are eligible for Batch Updates. In other words, responses in the “Response in Progress” column on the My Comment page that are listed as “Draft Responses” OR “Ready for Approval” can be batch updated. Items that can be batch updated include

- **Approval Method:** In this drop down there are two choices: PC Meeting or Letter Ballot.
- **Approval Date:** This is the date the committee approved the response. This item includes a popup calendar.
- **Approval Meeting Location:** Leave this blank if the response was approved by letter ballot.
- **Reply Deadline:** This is the date the commenter must reply to the committee response. If the commenter fails to reply by the deadline date, they will be listed in the online system as resolved. This item includes a popup calendar.
- **Response Status:** A “Draft Response” status can be batched updated to “Ready for Approval” or “Response Approved” status. A “Ready for Approval” status can be batch updated to “Response Approved”. This is a method of updating the status of responses in a batch process in lieu of individually. Multiple responses to comments may have been approved at the same time or during the same letter ballot and this provides the Chair with a method of updating multiple responses.



Response in Progress:	1
Draft Responses:	0
Ready for Approval:	1
Approved (but not yet sent):	0
Sent (No Reply Received):	0
Distinct Commenters:	3



Batch Updates | Send Responses | Take Comments Offline | Upload Offline Comments

Only comments with an associated Committee Response are eligible for the Batch Update. Check off the comments to which you wish to apply these updates.

Approval Method:

Approval Date:

Approval Meeting Location:

Reply Deadline:

Response Status:

Apply Updates | Reset

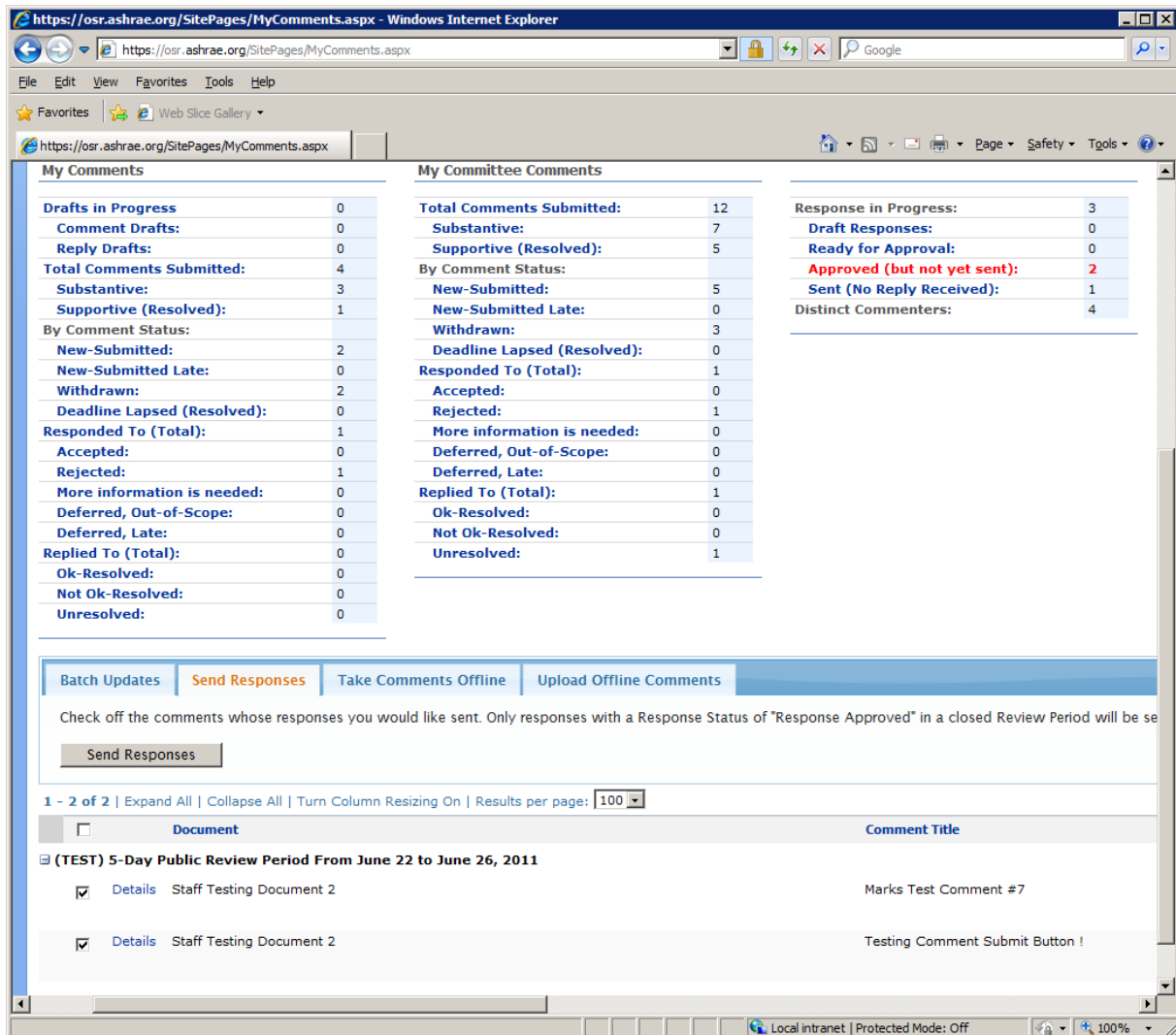
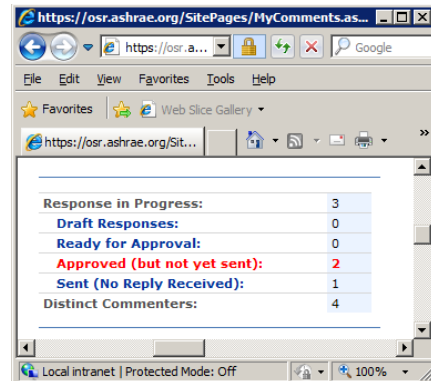
1 - 3 of 3 | Expand All | Collapse All | Turn Column Resizing On | Results per page: 100

Document	Comment Title
<input type="checkbox"/>	(TEST) 5-Day Public Review Period From June 22 to June 26, 2011

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9. To send approved responses to commenters the public review period must be closed AND the status of the response must be “Response Approved”. In other words, those responses in the “Response in Progress” column on the My Comments page that are listed under the “Approved (but not yet sent)” filter are eligible to send. Filter results will appear at the bottom of the page.

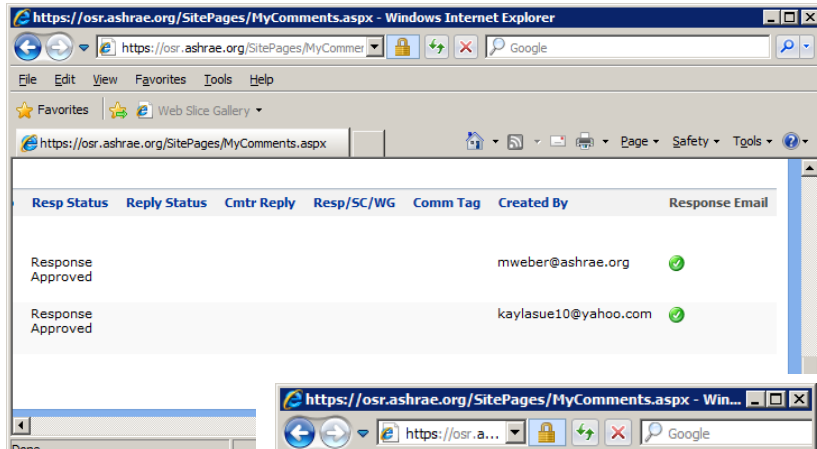
There are two ways to send responses, send multiple responses at one time or send responses individually using the check boxes next to the applicable comments in the filter results at the bottom of the page.



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Select the comments for which you would like to send responses and click on the “Send Responses” button in the menu bar.

When the responses have been sent successfully a green check mark will appear beside each comment. See the “Response Email” column to the far right of the filter results at the bottom of the MY Comments page (same page).



Once the responses have been sent to the commenters the status in the Response in Progress column on the My Comments page will change to “Sent (No Reply Received)”.

