

# EXTRACT GUIDELINES

*Adopted by the IAPMO Standards Council on December 1, 2001. Amended on September 16, 2003, December 16, 2003, November 2006, and November 2007.*

## A) General

(1) **Scope.** This guideline provides guidance to Technical Committees (TCs) for extracting text from other documents whose TCs have primary jurisdiction for the subject covered. This guideline is intended to apply to extraction among IAPMO documents, and documents between IAPMO and other ANSI-accredited standards developing organizations that are working with IAPMO to harmonize and/or coordinate their respective documents. The Extract Guidelines are meant to supplement but not conflict with IAPMO's Regulations Governing Committee Projects.

(2) **General Guidance.** A document may contain text extracted from another standards developing organization's document provided:

- (a) there is good and sufficient reason for the extracts;
- (b) there is clear indication, with the extracted text, of the number, title and edition of the document from which the extracts are taken and that requests for interpretations or proposed revisions of the text must be referred to the committee responsible for the source document;
- (c) any editing of the extracted text is confined only to making the style consistent with that of the document containing the extract and then only with the concurrence of the committee responsible for the source document; and
- (d) the extracted text is kept current with that of the source document.

## B) Procedures for Updating Extracts

The extract procedure requires that the extracted text be kept current with that of the source document in a timely appropriate manner.

In most cases an update to extracted text can be accomplished via a proposal or a comment during the regular revision process of the document. If no proposal to update extracted text is received, the document in which the extracted text appears must be updated by the committee responsible for the document during its next regular revision process.

It may be necessary to update extracted text prior to the next regular revision cycle of the document if the change in text of the document of origin results in a major conflict between the documents. If a request is received to update an extract prior to the next regular revision cycle of the document containing the extracted text, such a request shall be submitted to the IAPMO Standards Council Secretary who, after consultation with the appropriate committee chair, shall determine whether it is eligible for processing.

If the extract is determined to be eligible for processing, the staff liaison shall letter ballot the extracting committee in accordance with the Regulations Governing Committee Projects on the

updating of the extracted text, including any editorial revisions necessary to conform to the style of the document.

Note: If the extract needs to be editorially revised to fit the language of the document in which it is to appear, the staff liaison for the committee responsible for the document of origin shall contact the source committee to verify that the intent of the extract has not been changed.

A proposed extract shall be published in the appropriate media with a notice that the proposed extract has been forwarded to the responsible TC for processing and that anyone interested may comment on the proposed extract within the time period established and published.

The ballot results, including any negative ballots and the reasons for the negatives, as well as public comments shall be forwarded to the IAPMO Standards Council to determine whether or not to issue the extract update.

Extracts which are processed pursuant to these Guidelines, but outside of the regular revision process of the document shall be designated in the document as follows:

*A reference bracket [ ] following a section or paragraph indicates material that has been extracted from another document. This reprinted material is not the complete and official position of the source document on the reference subject which is represented by the standard in its entirety. Text which has been extracted pursuant to IAPMO's Extract Guidelines is denoted with the use of the source document in the margin. This text has not been fully processed by IAPMO in accordance with ANSI's public announcement consensus requirements for an American National Standard (ANS) nor approved by ANSI's Board of Standards Review, but will be fully processed in accordance with those requirements as part of the next revision cycle for this document.*

If the extracting committee does not wish to include the updated extract, the committee shall delete the existing extract from its document by means of a Tentative Interim Amendment (see Regulations Governing Committee Projects at section 5); or if the document is in the process of revision, by the normal processing of a document amendment.

### **C) Guidance for the extraction of text from one document to another**

(1) **General.** The intent of extracting text is to make a document as complete and useful as possible. Care must be taken not to compromise the intent of the criterion being extracted.

A section or paragraph being extracted from another document represents a specific thought, and it is important that the thought in its entirety be extracted. The context of the original extracted material should not be compromised or violated.

(2) **Exception and Caution Statements.** Text should not be extracted without including any exception(s) associated with the extracted text. Likewise, caution statements should also be included. Exception and caution statements are considered part of the requirements of the associated paragraph.

(3) **Paragraph Numbering.** Committees need to be careful not to change the relationship of paragraphs to each other in the way they renumber extracted text. For example, if a paragraph with 2 subparagraphs is renumbered as 3 separate and distinct paragraphs, does that change the relationship of paragraph 2 and 3 to the original paragraph 1. Many times subparagraphs refine requirements in the host paragraph and renumbering will change that emphasis, and possibly compromise that relationship. For example:

<b>Parent Document</b>	<b>Document Extracting</b>
7-5.1 Paragraph	8-2.3.1 Paragraph
7-5.1.1 Subparagraph	8-2.3.2 Paragraph
7-5.1.2 Subparagraph	8-2.3.3 Paragraph
7-5.2 Paragraph	8-2.3.4 Paragraph

The committee taking the extract should be very careful not to take part of a section or paragraph and skip another part of this same section or paragraph (e.g. take 7-5.1, 7-5.1.1, and 7-5.1.3, but not take 7-5.1.2) without a valid reason. This can be misleading as the user will think they have the complete text and the extracted text may be used out of context. The family of paragraphs that state a set of requirements should be kept together to ensure both documents are consistent in stated requirements.

(4) **References**

Where extracted material references another paragraph in the document from which the material is extracted, the committee should try to extract the referenced paragraph as well so their document is more complete and user friendly. The intent of extracting text is to make a document as complete and useful as possible. Sending someone back to another document for a referenced paragraph is not user friendly.

(5) **Notes and Related Appendices.**

Notes and appendices are intended as advisory, supplemental information, and thus they may or may not be included along with an extracted paragraph. If the extracted text contains “Notes” in the parent document, the committee should carefully review the notes. This same logic applies to related Annex sections. If the committee chooses not to extract the note or related Annex section, they should be sure that the paragraph cannot be misinterpreted based on the absence of this supplemental information.