



## UL Collaborative Standards Development System (UL CSDS)

### Quick Reference Guide – General

#### UL CSDS Basics

##### What is UL CSDS?

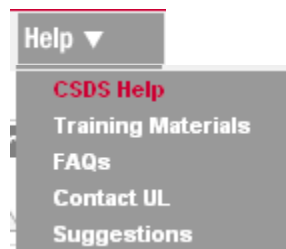
- The UL Collaborative Standards Development System (CSDS) was created to further enhance the maintenance of UL's existing standards and the creation of new ones.
- This process is accomplished through the distribution of proposals to revise a standard and the collaborative approval process surrounding it, as well as the collaboration around any number of topics. As a participant you may use this site to view information regarding UL standards and meetings, to comment and/or vote on proposals or to propose changes to a standard via a proposal request.

##### How do you participate in the CSDS?

- To fully participate using UL's CSDS system you need a user account.
- You can participate by submitting Proposal Requests; viewing Meeting Topics and submitting your attendance requests; and commenting on proposals in areas you have access to.

##### Is there Online Help Available?

- Yes. Click on the "Help" pulldown menu in CSDS and then click on "CSDS Help" to access a page-specific online version of the Help.



- In addition, before you log into CSDS, there is a "Learn More About the STP Process" link under the "**Not a CSDS user? Here are items you have access to and how to become a CSDS user.**" heading on the left side of the CSDS Home Page. This link provides information on UL's Consensus process.

**Not a CSDS user? Here are items you have access to and how to become a CSDS user.**

- [Use CSDS and Participate in the UL Standards Development process](#) – Don't have an account to access CSDS? Learn how to participate in the UL Standards development process.
- [View a list of Proposals for Comment](#) – A complete list of the proposals available for comment. Not a CSDS user? Purchase any of these proposals for access to the work area to submit comments.
- [View Upcoming STP Meetings](#) – A complete list of the upcoming STP Meetings.
- [Submit a Proposal Request](#) – Login and use the proposal request form. If you do not have a CSDS username and password, create an account so you can submit a proposal request to UL for review.
- [Request a New Standard to be Developed](#) – Submit a request for a new standard to be developed.
- [Learn More About the STP Process](#) – See our help available.

## Creating User Account and Log In

### How do I create a user account?

1. If you are not logged in as a User of the system, when you select *Submit a Proposal Request* from the Proposals pulldown menu or *Submit Request* in the Public Announcement window, you will be redirected to login the system. If you do not have a User account you may create one by clicking **Create User Account** found in the wording for New Users above the Login box. This will take you to the User Registration page.

#### Current Users:

*If you already have a CSDS user account use the Username and Password information provided for you in the "Welcome" e-mail. It is strongly recommended that you change your password after accessing the site.*

#### New Users:

If you would like to submit a Proposal Request or request to attend a meeting, click [Create User Account](#) to create a user account profile.

**Login**

The Username is typically your email address. The password is case sensitive and must be 6-12 numbers and/or letters.

Username

Password

[Forgot Your Password?](#)

**Tip:** The only way to get the option Create User Account area is to select *Submit Proposal Request* from the Proposals pulldown menu or submit a *Request to Attend a Meeting*.

**Tip:** Only individuals that have NOT been provided with a CSDS Username and Password should create a User Account.

**2. Fill in all required fields.**

Enter your *First Name*, *Last name* and *Organization*

User Registration	
User Information	
<b>First Name *</b>	<input type="text"/>
<b>Last Name *</b>	<input type="text"/>
<b>Organization</b>	<input type="text"/>

Enter a *Username* and *Confirm Username* by retyping it.

Username	
Username will be your e-mail address. Example: joeuser@CSDS.com	
<b>Username *</b>	<input type="text"/>
<b>Confirm Username *</b>	<input type="text"/>

Enter a *Password* and *Confirm Password* by retyping it.

Password	
Your password is case sensitive and must be 6-12 numbers and/or letters, and must contain at least one number and at least one letter.	
Password *	<input type="text"/>
Confirm Password *	<input type="text"/>

Select your *Language*, this will show all instructions in the selected language. Currently only English or Spanish can be selected.

Language	
The CSDS is able to support multiple language in order to enhance your user experience. Please select your default language preference below:	
Language *	English <input type="button" value="v"/>

### 3. Click Save or Cancel.

<input type="button" value="Save"/>	<input type="button" value="Cancel"/>
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### How Do I Login?

- Enter your Username and Password.

Login	
The Username is typically your email address. The password is case sensitive and must be 6-12 numbers and/or letters.	
Username	<input type="text"/>
Password	<input type="text"/>
<a href="#">Forgot Your Password?</a>	
<input type="button" value="Login"/>	

**Tip:** If you are already a user, your username and Password were provided in your UL CSDS Welcome email or the ones you set-up during a previous login. . The first time you log into the system, you will be prompted to change the password. Please select a password consisting of 6 – 12 alphanumeric characters for this purpose. The password is case-sensitive.

## Proposal Requests

### How do I submit a proposed change to a UL Standard?

- Select the **Submit Proposal Request** function from the Proposals pulldown menu, and fill in the required fields in the form that appears.



**Tip:** Make sure you are logged into CSDS first. If you do not have a user account, you will be prompted to create one.

- Enter *Subject of Proposal*, which should include text summarizing the nature of the proposal.
- Enter the *Standard* for which you would like to suggest the proposed change. To do this, use the magnifying glass to search for valid UL Standard Numbers.
- Enter the *Rationale* for the proposed change.

A screenshot of a web form titled "Proposal Request". At the top right are buttons for "Save as Draft", "Submit", and "Cancel". The form is divided into sections: "Standard and Requestor Information", "Subject of Proposal \*", "Requested by" (with the name "Davis, Barbara J."), "Standard \*", and "Rationale \*". The "Rationale" section features a rich text editor with a toolbar containing icons for bold, italic, underline, font color, text color, bulleted list, numbered list, link, unlink, and other text formatting options. The text area below the toolbar is currently empty.

- Enter the *Proposal Text*. This is the proposed change that you would like to submit.

- Attach any Supporting Documentation by using the *Add File* feature.
- Click **Save as Draft** to review or finish the proposal at a later date, Click **Submit** to submit the Proposal Request to UL, or Click **Cancel** to terminate the Request.

**Tip:** It is recommended that you compose your proposal Rationale and revised text outside of CSDS, for example, in Word, and then cut and past the proposal information into the CSDS Proposal Request form. The CSDS program will timeout after a period of inactivity and any proposal text not saved as a draft could be lost.

**Do I have to use UL CSDS to submit a proposal?**

- Yes. You must use UL CSDS to submit any proposed change to a UL standard.

**How long are draft Proposal Requests held in the system?**

- A draft will be deleted only if it is inactive in the system for 30 days.

**Do I see all Requests for Proposals submitted to UL?**

- No, you only see those Proposal Requests that you submit.
- If you are a subscriber to a standard, then you will see other individual's proposals when they are put into a Proposal Review Work Area, at which time you will be able to comment.

**What are the Proposal Request status terms?**

**Accepted** – A Proposal Request (PR) that has been determined to be fully developed, with a rationale and proposal in legislative text, and submitted for the correct standard is identified as "Accepted" for inclusion in the next Proposal Review Work Area. This can be changed to the following statuses: Processed, Forward To Task Group, and Returned. In addition, at this status, the PR can be copied (by the Owner) or withdrawn (by the Proposal Submitter).

**Copied** – This function can be used by the owner to create a PR with the status of “New” in a different Proposal Request Area when the same PR applies to more than one standard. This function can be used

from the following statuses: New, Pending, Accepted, Processed, Forwarded to Task Group, and Noted for Editorial Revision.

**Draft** – A Proposal Request that is able to be edited by Proposal Submitter, and has not yet been formally submitted. A PR can be returned as a draft or saved as a draft (a work in progress to be submitted later). If a PR remains in draft form on the system for 30 days, it will be deleted automatically. Using the “Submit” function changes the status to “New.”

**Forwarded to Task Group** – The Proposal Request Area Owner or Proposal Request Area Host has the option of forwarding the Proposal Request to a task group if it is determined that the PR is not fully developed, but the concept is supported. However, in order to set the status to Forward, a Task Group Work Area must already be established. This can be changed to the following statuses: Pending, Accepted, Processed, Noted for Editorial Revision, and Moved. In addition, at this status, the PR can be copied (by the Owner)

**Moved** – The Proposal Submitter identifies which Standard the Proposal Request applies to when the PR is prepared. In some cases, the Proposal Submitter may identify the wrong standard number on the PR. The PR is moved to another standard’s Proposal Request Area and marked with a status of "Moved" in the original Proposal Request Area. Once moved, a new PR is created with the status of “New” in the other Proposal Request Area. The original PR cannot be acted on.

**New** – A Proposal Request that has been formally submitted and stored in Proposal Request Area . This can be changed to the following statuses: Returned, Pending, Accepted, Processed, Noted for Editorial Revision, Forward to Task Group, and Moved. In addition, at this status, the PR can be copied (by the Owner) or withdrawn (by the Proposal Submitter).

**Noted for Editorial Revision** – This status is selected when a Proposal Request is received for an editorial change that does not require balloting. UL staff may refer to the Editorial versus Substantive Comment document for guidance on how to make this determination. The change may be included with other balloted proposals or processed as separate revisions without proposal. Once the status has been set to "Noted for Editorial Revision" it can only be copied (by the Owner).

**Pending** – A Proposal Request can be "Pending" for various reasons including when it relates to a harmonized standard and the proposal is required to be approved by the THC or when the proposal is to be discussed as part of a meeting. This can be changed to the following statuses: Returned, Accepted, Processed, Forward To Task Group, Noted for Editorial Revision, and Moved. In addition, at this status, the PR can be copied (by the Owner).

**Processed** – Work is being started to include the Proposal Request in a proposal for the standard, whether for ballot or preliminary review. Once the status has been set to "Processed," it can only be copied (by the Owner).

**Returned** – The Proposal Request has been reviewed by the Proposal Request Area Owner or Proposal Request Area Host and returned to the Proposal Submitter for one of several reasons. The most likely reason for returning the PR is that it is not fully developed, however, the Proposal Request Area Owner or Proposal Request Area Host can also enter other reasons for returning the PR. Once returned, a new PR is created with the status “Draft.” The original PR cannot be acted on.

**Withdrawn** – The Proposal Submitter has indicated that the Proposal Request is no longer necessary. Once the status has been set to withdrawn, the PR cannot be acted on.

## Meeting Areas

### What types of Meeting Areas are there?

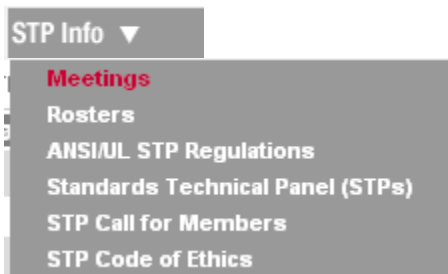
- **Industry** – This Meeting Area would be used by UL to discuss certification issues or other industry specific issues. UL would also use this area for Meetings on standards that are not covered by an STP.
- **STP** – This Meeting Area is used for STP Meetings.
- **THC** – This Meeting Area will be used by the THC.
- **Task Group** – This Meeting Area is for STP Task Groups as well as any other group that does not fall into the categories above.

### Where will I find a STP Meeting Agenda or other Agenda?

- If you are an STP Member or a Standards Subscriber covered by this STP you will get a CSDS email announcement when the STP Meeting Agenda is posted and this will have a link to the STP Meeting Agenda.
- You will get a CSDS email announcement when the Meeting Agenda is posted in the Meeting Area for any Meeting Area you are invited to.
- Once posted the Meeting Agenda will be able to be viewed from the Quick View menu within the Meeting Area.
- If you are not an STP Member or a Standards Subscriber covered by this STP, you are able to view the agenda by selecting “Meetings” from the STP Info pulldown menu, selecting the meeting you are interested in, and clicking on “View Meeting Agenda” in the popup window.

### How do I Request to Attend an STP Meeting?

- Select “Meetings” from the STP Info pulldown menu.
- Scroll your mouse over the STP Meeting that you would like to attend and click the left mouse button.



Meetings Available		
<u>STP Number</u>	<u>Meeting Subject</u>	<u>Meeting Dates</u>
STP 0414	STP 414	2008-10-09
STP 0583	STP 583 Meeting	2008-10-20, 2008-10-21
STP 0758	STP 758 Issues	2008-10-01, 2008-10-02
STP 0982	STP 982 Meeting	2008-09-24
STP 1026	STP 1026 Meeting	2008-09-23
STP 1993	STP 1993 to discuss proposed third edition of tri-...	2008-10-29, 2008-10-30

- Select *Submit Request* to request to attend an STP Meeting.



STP Meeting Announcement			
<b>Meeting Information</b>			
STP Name	STP 1026	Attend?	<a href="#">Submit Request</a>
City	Northbrook		
State	IL		
Project Manager	Herman, Jonette A.		
Email Address	jonette.a.herman@us.ul.com		
Phone	919-549-1479		
Meeting Date(s)	2008-09-23		
Meeting Agenda	<a href="#">View Meeting Agenda</a>		
<a href="#">Close this window</a>			

- Provide *Reason for Attending* and click **Update**.

Public Request to Attend	
<b>Participant Information</b>	
Name	<a href="#">Davis, Barbara J.</a>
Reason for Attending *	<input type="text"/>
<b>Meeting Information</b>	If accepted to the meeting you will receive an e-mail with more information and a link to the meeting area to obtain additional information regarding the meeting's agenda.
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

#### How do I let the Meeting Owner know I will be attending a Meeting, I was invited to?

- All individuals invited to the meeting should log into CSDS and indicate whether or not they will attend the meeting, their preferred name for the name badge and if they would like to send a Substitute in their place if they cannot attend the meeting.
- From your Meetings tab you can click on the "Accepted" or "Declined" radial button to indicate your attendance. This will open the Meeting Response form. Fill in the appropriate information and click the Submit button.

Work Areas **Meetings** Proposal Requests Calendar

Select One:  All My Meetings  All My STP Meetings  All My Archived Meetings  All Open Meetings  All Archived Meetings Hide Filter

Select All That Apply:  Attendance Due  Attendance Submitted Filter

Subject	Attending?	Meeting Date(s)	Attendance Summary	Meeting Agenda	Meeting Report
STP 0758 Meeting Scheduled For 2008-10-01, 2008-10-02	<input type="radio"/> Accepted <input type="radio"/> Declined <input checked="" type="radio"/> Not Responded	2008-10-01 2008-10-02	8 Accepted 7 Declined 12 Not Responded	2008-08-20	

**Meeting Response Form**

**STP 0758 Meeting Scheduled For 2008-10-01, 2008-10-02**

Please review and submit your attendance response for the meeting. Any decision regarding funding will be reviewed and responded to prior to approval.  
 Note: Fields marked with an \* are required.

Invitee Response	
Invitee Information	
Name	<a href="#">Linda L. Phinney - Underwriters Laboratories Inc.</a>
Attending *	Yes
Name Badge*	

[Close Window](#)

- If you are already in the Meeting Area in CSDS, click on the My Attendance tab to access the Invitee Response form.

Meeting Area Home Location And Time **My Attendance** Attendance Summary Request a Guest STP Roster

Please review and submit your attendance response for the meeting. Any decision regarding funding will be reviewed and responded to prior to approval.  
 Note: Fields marked with an \* are required.

Invitee Response	
Invitee Information	
Name	<a href="#">Linda L. Phinney - Underwriters Laboratories Inc.</a>
Attending *	Yes
Name Badge*	Linda Phinney

## Work Areas

### What are the Work Area Types?

- **Proposal Review** - This work area allows users to review, vote (if applicable), comment, and post responses to comments on proposals to UL Standards. If it is a UL Standard covered by an STP there may also be balloting of the proposals.
- **Re-circulation** - This work area is used to re-circulate proposals and/or responses to comments.
- **Comment Resolution** - This work area is used for collaborating on draft responses or draft proposals that are a result of comments from a Proposal Review or a Re-Circulation Work Area.
- **THC** - This area is used for Technical Harmonization Committees to review materials, comment and respond to comments.
- **General** - This area is used for all other collaborations. This may include but is not limited to code change, effective dates, guide card change, IEC groups, Interoffice review, SIs, TAGs, Task Group review, UL's review of another organizations standards, and US National Committees.

### How do I comment on Proposals?

- All Work Area types allow for commenting.
- From the User Home select the Work Areas tab to view your available Work Areas.
- Select the Work Area by clicking on the **Name** of the desired Work Area. Selecting the desired Work Area will take you to the Work Area Home, and will display the Summary of Topics for the document posted.

#### UL 982 Ed. 5 - Proposal Review - Opened 2008-07-29

Work Area Home	Add/View Comments	Ballot	Vote Summary	STP Roster	Effective Date
Standard:	Standard for Motor-Operated Household Food Preparing Machines				
Work Area Status:	OPEN				
Comment Due Date:	2008-08-22				
Ballot Due Date:	2008-08-22				
<b>Summary of Topics</b>					
<a href="#">3. Battery-Operated Appliances - Revisions To 36.20 Relative To Temperature Test Method</a>					
<a href="#">4. Switch Ratings Relative To The Switch Overload And Endurance Tests</a>					
Please note that proposed requirements are of a tentative and early nature and are for review and comment only. Current requirements are to be used to judge a product until these requirements are published in final form.					
For your convenience in review, proposed additions to existing requirements are shown <u>underlined</u> and proposed deletions are shown <del>lined-out</del> . For Proposed New Editions, the proposed changes from the previous edition may be indicated by an <u>underline</u> for additions and <del>lined-out</del> for deletions to existing requirements.					

- View each topic within the Summary of Topics by moving your mouse over the desired topic. Once highlighted, **click on the topic** you wish to open.
- Alternatively, from the list of Work Areas, click on the Add/View Comments link to go directly to the Add/View Comments tab in the Work Area. Then click on the desired Topic in the left pane to view the desired proposal and any existing Comments. An "Add Comment" button will be available.
- Within the topic, comments may be submitted at any level. The document tree on the left side of the screen lists specific portions of the proposal topic in which comments may be made. A comment may be submitted for the entire topic you are viewing on-screen by selecting the topic in the document tree. However, if your comment is specific, and pertains to a single paragraph, table or

figure, a comment may be submitted at that level as well by selecting the appropriate portion of the proposal topic. Each topic title, as well as each paragraph number, table number and figure number includes an "Add Comment" button in the proposal, to **add a comment select this button**.

UL 982 Ed. 5 - Proposal Review - Opened 2008-07-29

Work Area Home **Add Comment** Ballot Vote Summary STP Roster Effective Date

Click to view Filter Options

Document

- Topic - 3. Battery- Operated Appliances - Revisions To 36.20 Relative To Temperature Test Method
- Rationale
- Paragraph 36.20.2
- Paragraph 48.1

Topic - 4. Switch Ratings

36.20.2 The temperature test is to be conducted as follows:

a) The battery charger is to be operated while charging a battery pack discharged completely as indicated in 36.20.1 until constant temperatures are attained. Temperatures are to be monitored during the entire charging operation so that temperatures in excess of the requirements would be recorded, if any.

Exception No. 1: This test is not required to be conducted on a Separate battery charger.

**Official comment responses will be posted after the close of the comment period.**

- Selecting *Add Comment* will open an additional screen, which will allow you to **submit your comment**. Atop the comment box will appear the topic title, or paragraph number, table number or figure number you have selected to comment on.
  - Enter *Subject*, which should include text summarizing the nature of your comment.
  - Enter in the "Comment" field the comment which you wish to make on the proposal.
  - Enter in the "Suggested Changes to the Proposal" field changes that you suggest be made to the proposal to address the concerns raised by your comment. This box is formatted to allow you the tools to submit the text of your comment in the properly formatted style. If you have selected to comment on a particular paragraph, etc., notice the link atop this box allowing you to pull in the complete text of the paragraph so you can edit your changes without having to retype the original text.

**Tip:** Besides using the click "here" function stated above to copy in text to the comment box, you may also use the Copy / Paste function using Ctrl-C and Ctrl-V.

- Upload Supporting Documentation if necessary by clicking the "Add File" button near the bottom of the comment form.
- At the bottom and top of the comment form are buttons to: *Submit* to complete submittal of your comment, *Save As Draft* to save your comment for future editing, or *Close* to cancel the submission of the comment.

Comment - Microsoft Internet Explorer

**Comment: Paragraph 36.20.2**

Note: Fields marked with an \* are required.

Save As Draft   Submit   Close

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**Comment Form**

**Subject \*** Paragraph 36.20.2

**Comment \***

**Instructions:** Provide your comment in the space below regarding the above subject and any proposed changes need to be provided in the **Suggested Changes to the Proposal** section.

Font   Size

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**Suggested Changes to the Proposal**      If you wish to load the proposal text for commenting click [here](#)

**Instructions:** Show proposed additions to existing requirements with underlined text and proposed deletions with ~~lined-out~~ text.

Font   Size

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Supporting Documentation

Done      Local intranet

Bottom of Comment Form:

Supporting Documentation			
Document Name	Document Description	Size (KB)	Add File
There are no files attached.			
Save As Draft		Submit	Close

- Once submitted, the comment remains open. Added atop the *comment* you will now see in addition to the topic title, or paragraph, table or figure number, the *Author* of the comment, and the date and time the comment was *posted*.

Author	Comment
<a href="#">EDWARD CHARKEY</a> STP Member - General	<b>Paragraph 36.20.2</b> <a href="#">Comment</a> 2008-07-31 10:17:59 AM (CDT) Comment Text

- New options will appear at the bottom and top of your submitted comment, however if you have just submitted this comment (Reply, Supersede, Withdraw, Close), you will most likely choose to **select Close** to complete the process of submitting your comment.

You will be directed to the proposal review you were originally reviewing. You may continue to comment on additional paragraphs, tables and figures, or return to the Work Area Home.

**Tip:** The Comment Period closes at 11:59PM Central Standard Time in the U.S on the comment close date.