Quick Reference Guide – STP Members

UL CSDS Basics

What is UL CSDS?
- The UL Collaborative Standards Development System (CSDS) was created to facilitate the maintenance of UL’s existing standards and the creation of new ones. CSDS can be accessed at http://csds.ul.com.
- 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 UL CSDS?
- To fully participate using UL’s CSDS system you need a user account.
- You can participate by submitting Proposal Requests, viewing Meeting Topics, submit meeting attendance requests, commenting and voting on proposals in areas you have access to view.

Is there Online Help Available?
- Yes. Click on the Help pull-down menu in the CSDS main menu and then click on CSDS Help to access a page-specific online version of the Help.

Where do I find items?
- The User Home page provides a general overview of the user’s account. This screen is the first to appear following logging in. You may navigate using the tabs across the top of the screen:
• Below the tabs in the User Home, there is a Filter area. The Filter may be hidden by clicking on the Hide Filter button. It can be restored by clicking on the Show Filter button.

• On the User Home page is a Calendar feature displaying items such as meeting and ballot/comment due dates. The calendar defaults to a monthly view but can be changed to a weekly view by selecting Week View.
Each time a Work Area or Meeting Area is opened for the Standards covered by the STP, you will receive an email notification containing a link that will take you directly to the referenced Work Area or Meeting Area once you are logged into CSDS.

### Login

2. Enter your **Username**, which is your email address, and **Password**.

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**Tip:** The email address and password are the ones provided to you in the CSDS Welcome email.
Proposal Requests
How do I submit a proposed change to a UL Standard?

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

Tip: Log into CSDS first.

2. Fill in the Subject of Proposal and Standard Information.
   - Enter the Subject of Proposal. This subject should be text, which easily identifies the nature and/or contents of the proposal you are submitting. This field allows 600 characters.
   - The Requested By field automatically defaults to your name, as the login user. This cannot be changed. By clicking on your name, you may view a summary, known as your User Profile.
   - Enter the Standard, by selecting the magnifying glass.

Tip: Fields marked with an (*) are required.

3. Enter the Rationale. This field should contain the reason for your proposal.
   A good rationale includes the reasons for the proposed change (the “Why”, such as a statement of the problem and the proposed solution).
4. Enter the **Proposal Text.** This field should contain the exact text of your proposal. Include the specific section or paragraph that you are proposing to change. Use strikeouts and underlines to show changes to your proposals.

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**Tip:** You may copy and paste from another word processing source, such as Microsoft Word, however, the formatting may not copy. If a table is copied and pasted, the format may not be maintained. However, if you attach a file using the supporting document feature, all formatting should be maintained.
5. Select an Impact. This allows the Proposal Submitter to select how their proposed change(s) could impact the standard.

<table>
<thead>
<tr>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>We are exploring ways to provide more information to the STP. Please mark the information below regarding your proposal. The marked item(s) will be provided with your rationale when your proposal is posted in CSDS.</td>
</tr>
<tr>
<td>It is the proposal submitters opinion that this proposal affects the following topics/sections of the Standard (check all that apply):</td>
</tr>
<tr>
<td>□ A new test requirement</td>
</tr>
<tr>
<td>□ Test requirement revision or clarification</td>
</tr>
<tr>
<td>□ New construction requirement</td>
</tr>
<tr>
<td>□ Construction requirement revision or clarification</td>
</tr>
<tr>
<td>□ Marking requirement</td>
</tr>
<tr>
<td>□ Instruction requirement</td>
</tr>
<tr>
<td>□ Other</td>
</tr>
</tbody>
</table>

6. Attach any Supporting Documentation. This allows you to attach files to use as support for, or in conjunction with your Proposal Request. This is optional.

<table>
<thead>
<tr>
<th>Supporting Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Name</td>
</tr>
<tr>
<td>There are no files attached.</td>
</tr>
</tbody>
</table>

7. 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.

<table>
<thead>
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<tbody>
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</tr>
<tr>
<td>There are no files attached.</td>
</tr>
</tbody>
</table>

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.

If you are not ready to submit your completed Proposal Request Form, and wish to save it in draft form, you may click the Save as Draft button at the bottom or top of your Proposal Request Form. A Proposal Request must have the Standard and Subject of Proposal fields completed in order to be saved as a draft.

Once selected, you will see the Proposal Request Form as you have completed it, with one new field added. Below the Standard field, there will appear a Requested Status field. If you have saved the Proposal Request Form as a draft, the word Draft will appear in this field.
The top of the form will say, "The Proposal Request was successfully submitted. That means it has been submitted into the CSDS system but is still in Draft form. The completed form must be submitted using the Submit button before it is sent to the Project Manager for the Standard."

**Tip:** Click on Draft to open a description of all the possible proposal statuses.

**Tip:** Once you have saved your document as a draft, you are now free to navigate within the system and may return to your draft proposal at any time.

To retrieve a Proposal Request that you have saved as a Draft, from the User Home page, select the Proposal Requests tab. A list of available UL Standards will appear. Select the standard for which you have drafted your proposal. A list of all your proposals for this standard should appear, indicating the subject, the related parent Proposal Request number, the status (in this case it would be Draft), the date you were last in the Proposal Request, and your name in the Created By field.

**Tip:** If you have created multiple proposals, this table can be sorted by clicking the headings of any of the columns. Click once for ascending and twice for descending order.

Using the Filter box at the top, it’s also possible to view proposals only of a certain status or to search for a particular proposal by its date.

Select the Refresh button to enter your Filter options and refresh the screen. Select the Reset button to clear your previous selections.
Tip: Dragging your cursor over the desired Proposal Request will highlight it, allowing you to click on the subject to open the document. Once opened, to begin working on the document, you must first click on the Edit button at either the top or bottom of the Proposal Request form. This will unlock the document allowing you to add text or modify what has already been entered. Once complete, you may select Save as Draft, or you may choose Submit, Delete, or Cancel.

Submit
Click the Submit button to send the Proposal Request to UL for processing. Once submitted, a Proposal Request may no longer be revised by the Proposal Submitter. You can view your submitted proposal through the Proposal Requests tab on your User Home, then selecting the corresponding standard to view a list of your proposals.

Tip: Once submitted, the status of your proposal will change. This status will be indicated on the proposal. When the status is clicked, a box will open explaining in detail the definition of the status.

After a Proposal Request is submitted, there is no longer an option to edit the proposal. Instead, you may view your submitted proposal and have the option to select the button at the top or bottom of the form labeled Withdraw Proposal Request.

Cancel
Select the Cancel button to cancel the current updates you made to the document and return you to the saved draft as it appeared when it was first saved.

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 that has been determined to be sufficiently developed, (i.e. it contains a rationale and proposal in legislative text and no major issues are identified) for UL to commit resources to advance the proposal to the next stage in the Standards development process.

Advanced to Work Area – A Work Area has been opened in CSDS to review/ballot the Proposal Request.

Completed – The Proposal Request is set to this status when (1) the Proposal Request has been published as part of Revision Pages or a New Edition, (2) the Proposal Request was withdrawn after Preliminary Review by the Proposal Submitter or (3) the Proposal Request failed to achieve consensus after balloting.

Draft – A Proposal Request that is able to be edited by the Proposal Submitter, and has not yet been formally submitted. A Proposal Request can be returned as a draft or saved as a draft (a work in progress to be submitted later). If a Proposal Request 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 – The Proposal Request has been forwarded to a group other than the STP. This status indicates that a proposal has been forwarded to a group such as a Technical Harmonization Committee, or a Task Group, for discussion or further review.
In Process – Beginning the in-depth review of the Proposal Request and the preparation to include the Proposal Request in a proposal for the standard for preliminary review, ballot, or discussion at an STP meeting.

New – A Proposal Request that has been formally submitted and stored in the Proposal Request Area.

Noted for Editorial Revision – This status is selected when a Proposal Request is received for an editorial change that does not require balloting.

Pending – A Proposal Request can be pending for various reasons including, but not limited to when the proposal contains copyrighted material or there is a Call for Proposals that will take longer than a month.

Returned – The Proposal Request has been reviewed by UL and returned to the Proposal Submitter for one of several reasons. The most likely reason for returning the Proposal Request is that it is not fully developed. Once returned, a new Proposal Request is created with the status Draft. The original Proposal Request cannot be acted on.

Withdrawn – The Proposal Submitter has indicated that the Proposal Request is no longer necessary.

Meeting Areas

Where will I find a STP Meeting Agenda?

- 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.
- Once posted, the Meeting Agenda will be able to be viewed from the Quick View menu within the Meeting Area.
- You are also able to view the agenda by selecting Meetings from the STP Info pull-down menu, selecting the meeting you are interested in attending and clicking on View Meeting Agenda in the popup window.

How do I let the Project Manager know I will be attending an STP Meeting?

- STP Members 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 button to indicate your attendance. This will open the Invitee Response form. Fill in the appropriate information and click the Submit button.
If you are already in the Meeting Area in CSDS, click on the My Attendance tab to access the Invitee Response form.

Work Areas

What are the Work Area Types?

- **Preliminary Review** – This work area allows users to review and comment on preliminary proposals prior to the balloted Proposal Review work area being made available.
- **Proposal Review** - This work area allows users to review, vote (if an STP Member), comment, and post responses to comments on proposals to UL Standards.
- **Re-circulation** - This work area is used to re-circulate proposals and/or responses to comments.

How do I vote on Proposals?

1. From the Work Area tab on the User Home page, click on the Vote Now or View My Ballot links under the Vote Due Date - Action column.

Or, if you are already in the Work Area, click on the Ballot tab. You will be directed to your Ballot for the proposal.
Tip: Only STP Members designated as voting members will see this function.

2. Vote on Proposals

- The Ballot information is system generated to show the current user’s name, the **ballot question**, ballot due on, and last modified. Note you may need to use the scroll bar on the right side of the screen to scroll down to the voting area.

- Click on **Vote Yes to All**, if you want to vote yes to every item, or

- Select **Yes, No, or Abstain** for each Topic being balloted.

- Click on the **Submit** button to record your votes. A popup box will confirm that your votes were recorded.

- If you vote No on a Topic without posting a comment, a popup box will appear to remind you that your No vote will not be counted until a comment is posted. A link to **Provide Comment Now** will also appear in the Comment Count column of the ballot.

- Review your Ballot to make sure that all votes were properly recorded and comments were added as appropriate.
Tip: You may modify your ballot as many times as necessary up to the ballot closing date. Each time you must go into your Ballot and click on the Submit button to record your new votes.

How do I comment on Proposals?

- If you have voted “No” on a topic, you can click on the Provide Comment Now link in the ballot to open the comment form.
- Otherwise, click on the topic description (underlined text) under the Topic Summary heading in the table to display the proposal.
- Click on the Add Comment button to enter your comment. Selecting Add Comment will open an additional screen, which will allow you to submit 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.
- Upload Supporting Documentation if necessary by clicking the Add File button at 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 Cancel (to cancel the submission of the comment).

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