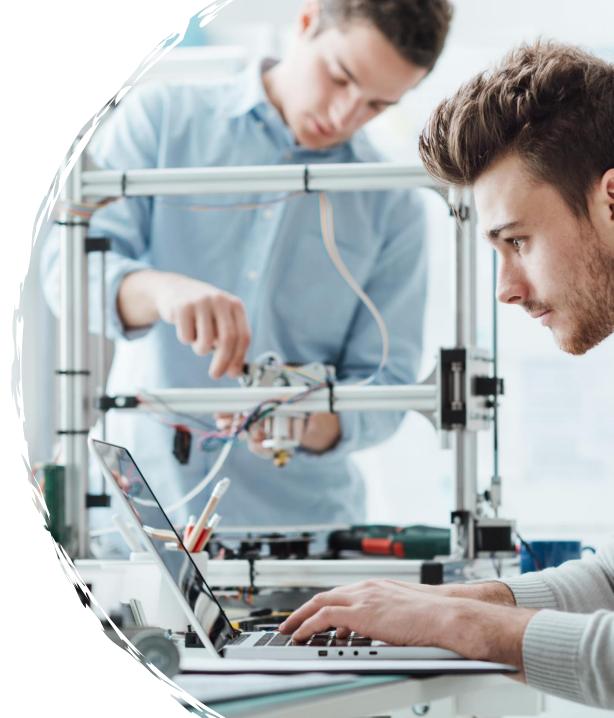


# ETSI STF/TTF EXPERTS' GUIDE

How to get started with your ETSI drafting





# Editing your document, where to start?



The STF/TTF Experts's guide has been developed to give an overview of what is useful to know when drafting an ETSI Deliverable.

What we would like to achieve with this tutorial is to give you a good idea of what you should start with and make sure you know who can help you with the "editing of your ETSI Deliverable" and what is the process development from start of work to publication.

If you want to know more about *editHelp!* service, you are invited to watch the video tour of our website available at <a href="https://portal.etsi.org/Services/editHelp/How-to-start/editHelp-introduction">https://portal.etsi.org/Services/editHelp/How-to-start/editHelp-introduction</a>.

Should you need information on how to use the Contribution tool on the ETSI Portal, this is where the information can be found <a href="http://help.etsi.org/index.php?title=Contributions\_application#">http://help.etsi.org/index.php?title=Contributions\_application#</a>
WI\_Details\_tab\_-\_Creation\_of\_a\_New\_Deliverable.



# Administrative requirements



Work can start after the <u>contract</u> is signed by both parties.

The initial work plan is agreed during the preparatory meeting.

Experts can book an office space for the working sessions in ETSI premises as required, with STF/TTF Leader's agreement using the <u>Booking application</u> (click <u>here</u> to access further details).

After the end of each month, meaning before the 7thof the following month, the work done should be confirmed, using the <u>timesheet application</u> (click <u>here</u> to access further details).

The STF/TTF Leader should review and validate the timesheet declaration of each expert, before the 14thof the following month.

The Funded Activities Team will do the final acceptance of all the timesheets validated by the STF/TTF Leader, starting from the 15th.

If everybody respects the agreed times and dates, all the work performed will be accounted for in a timely manner.



## Travels & payments



The travel costs to attend the Projects working sessions is included in the contractual compensation. A mission travel may be requested to present the results of the Project and/or to attend related events.

The travellers should prepare a Travel Order on Notilus for the mission travels which will be validated by the STF/TTF leader and by ETSI.

A travel expense must be prepared also on Notilus with the specific details of the travel organization, to be approved by ETSI. The motivations for exceptions to the <u>ETSI travel rules</u> must be clearly indicated in the travel order.

Reimbursement shall be requested, according to the approved travel expense with an invoice from the company with copies of the detailed justification receipts. In the case that unexpected extra-costs have been incurred, they should also be clearly indicated in the reimbursement request.

Regarding payment, FA Team will confirm the achievement of the milestones and provide you with the necessary information to issue the invoice.

The milestones that must be achieved have been defined in the preparatory meeting (see the meeting minutes) and are part of your contract. Payments will be made upon the achievement of these milestones.

Requests (for payment) during the duration of the STF/TTF can be sent to STFLink@etsi.org.



### IT environment



When working in ETSI, you will have access to a desktop computer, configured with the IT environment. If any special software is required, a request must be made to the ETSI Secretariat. editHelp! and the IT services can advise whether the use of this software is compatible with the ETSI IT policy and with the ETSI editing requirements.

When you are working from your home office, your organization must make available an IT configuration equivalent to the standard ETSI environment, in order to be able to exchange information with the other experts and the ETSI Secretariat.

This information may be found on the ETSI portal at <a href="https://portal.etsi.org/Services/editHelp/How-to-start/Supported-file-formats">https://portal.etsi.org/Services/editHelp/How-to-start/Supported-file-formats</a>



### **ETSI DOCBOX**



A document repository area is provided on the <u>ETSI docbox</u>, which is accessible from both inside and outside ETSI. This contains a "Public" area, accessible in read-only mode to all ETSI-On-Line users and a Project <u>workarea</u> to which access is restricted to the experts and can be used to store preliminary drafts and other confidential documents. Before leaving ETSI, you have to move the documents you need to the "docbox" area.

For each STF/TTF, a dedicated Teams workspace is available for the project members to discuss the drafts and exchange information during the project's entire lifetime.

Open WEB pages can also be created on the ETSI Portal to present the activity of the STF/TTF to stakeholders outside ETSI.

When working in ETSI, documents can be temporarily stored on the local network but will not be accessible from outside ETSI.

# support and se

#### you in your work

ETSI Harmonised Standards

resolution report template

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Search for ETSI star
Advanced search E
Search for a speci/
3GPP standards /
FAQs
Contact edi/

## FAQ & contact us details



https://portal.etsi.org/Services/editHelp

If it is the first time you work on an ETSI Deliverable, we invite you to go through the entire presentation.

If not, and you would like to find an answer to a specific question, then we invite you to consult the FAQ first, by clicking on <a href="https://portal.etsi.org/Services/editHelp/To-help-you-in-your-work/FAQs">https://portal.etsi.org/Services/editHelp/To-help-you-in-your-work/FAQs</a>.

If you have already done this but could not find the answer, we suggest you contact *editHelp!* directly (<a href="https://portal.etsi.org/Services/editHelp/Contact-Us">https://portal.etsi.org/Services/editHelp/Contact-Us</a>). *editHelp!* will make sure to provide you the information you are looking for.

The *editHelp!* website is also a source of useful information. It was developed to give in a glance all the content you may be interested in.



## Drafting your 1st deliverable



If it is your 1<sup>st</sup> ETSI Deliverable, we encourage you to read the booklet called Writing World Class Standards available at <a href="https://www.etsi.org/e-">https://www.etsi.org/e-</a>
<a href="brochure/WritingWorldClassStandards/mobile/#p=1">brochure/WritingWorldClassStandards/mobile/#p=1</a>.

This booklet starts with the basics for Rapporteurs who are new to standardization or new to ETSI.

It then goes on with guidance on how to <u>choose the right type of standard</u>, how to <u>structure a standard</u> and draft it, how to <u>express the technical requirements</u> so that you achieve your goals and finally how to <u>validate</u>, test and <u>maintain</u> a standard.

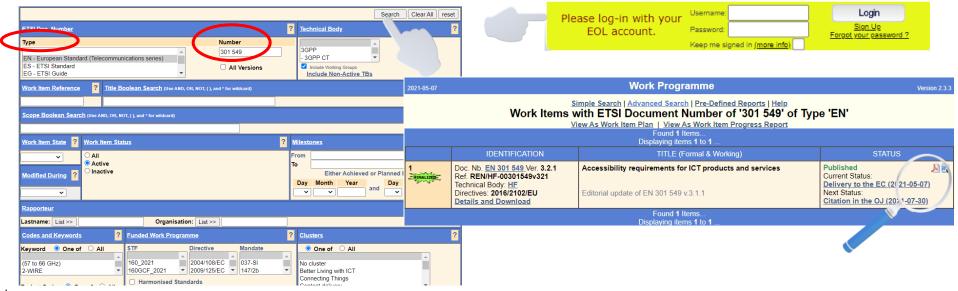


## Start drafting a revision



If it's not a 1<sup>st</sup> publication but a revision of an already published ETSI Deliverable that you have to produce, it is essential that you start working on **the latest published version**. In case you are not sure that the one you have is the latest version, it is necessary to search in the right place for the proper version.

You can use the advanced search tool to find it <a href="https://portal.etsi.org/webapp/WorkProgram/Expert/QueryForm.asp">https://portal.etsi.org/webapp/WorkProgram/Expert/QueryForm.asp</a>





### Personal information



Talking about contact, are your contact details up-to-date?

The ETSI Secretariat shall keep you informed all along the process of the development of your ETSI Deliverable. So, it is essential that your recorded details are accurate.

If not, there is a risk that this could delay the production time of your ETSI Deliverable. Same for the Work Programme. The name of the Rapporteur is always mentioned. If this is not correctly updated, the ETSI Secretariat will contact the wrong person, and this will also affect the production time. Please access your personal details by clicking on

https://portal.etsi.org/webapp/teldir/PersonalInfo.asp where you'll be able to update if needed. If you have difficulties updating your details, just inform the ETSI Secretariat that corrections are needed and the Technical Officer or the Standardization Support Professional or editHelp! can update the information for you.



Title;¶
Part#:-Part-element-of-title;¶
Sub-part#:-Sub-part-element-of-title¶
Release#¶

## **ETSI skeletons**



If you are developing a brand-new ETSI Deliverable, the best way to start is to download the right skeleton. These can be downloaded from this page:

https://portal.etsi.org/Services/editHelp/Standards-development/Drafting/Skeletons.



Principles for drafting ETSI deliverables with the use of skeletons

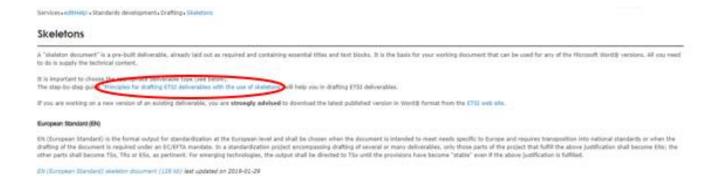
## ETSI skeletons and guide



At the same time and from the same location, we invite you to also download the guide named "Principles for drafting an ETSI deliverable with the use of skeletons".

https://portal.etsi.org/Portals/0/TBpages/edithelp/Docs/Principles\_for\_drafting\_ETSI\_deliverables.pdf

This guide contains all the details you will need when drafting your ETSI Deliverable. It follows the complete structure of the draft from beginning to end, starting with the cover page and ending with the history box.



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le of contents and List of figures and/or tables
List of figures and/or tables
flectual Property Rights
rword
General information on Foreword
Foreword in ETSI multi-part deliverables
******
Additional text Transposition table for ENs
dal verbs terminology
cutive summary
oduction
De
General information on References
Normative references
<ol> <li>Normative references in normative ETSI deliverables (TS, EN (Harm Standard), ES and GS)</li> </ol>
references in informative ETSI deliverable

## ETSI skeletons and guide



For example, it gives guidance on references, terms, symbols, abbreviations and details on ETSI styles on how they are supposed to be used and much more following the skeletons' structure.

It also explains how to deal with figures, tables, equations, mathematical formulae, supplementary files, in short, everything you could possibly need for your deliverable.

All the information is summed up in this document to facilitate the drafting from an editing point of view.



### **ETSI videos**



For a better understanding and a simplified use of the ETSI styles we invite you to watch the videos available at <a href="https://portal.etsi.org/Services/editHelp/Standards-development/Drafting/Styles-toolbar">https://portal.etsi.org/Services/editHelp/Standards-development/Drafting/Styles-toolbar</a>.

#### Styles listing

The listing of all the styles used in ETSI deliverables is available in the table here.

Do not alter existing styles or formats pre-set in the ETSI styles, do not add new styles to the ETSI template and do not delete ETSI styles

#### Styles template

The ETSI Secretariat provides a Microsoft® Word template which contains a set of pre-defined styles simplifying the formatting of documents according to the ETSI drafting rules:

- applying the ETSI template from the very beginning of work avoids delay throughout the drafting stage;
- it can be applied to a new or existing ETSI deliverable;
- . it is recommended to attach it to the change request (CR) template;
- it must only be used for the purpose of the standardization work within ETSI.

For Word for Windows® 2007 and higher use the following file:

Download ETSIW\_2013.dotm (17 kb)

For Word for Windows® 1997 to 2003 use the following file:

• Download ETSIW\_80.dot (25 kb)

Help to install the ETSI template! in PDF format or video gui



#### Styles toolbar

The ETSI styles toolbar allows for the easy application of ETSI styles when working with Microsoft Word®. It can be installed on your computer and will appear on your working window so that all the tools you need for drafting are available in just one click. We strongly recommend that you install this toolbar as correct use of styles speeds up the pre-processing procedure.

For Word for Windows® 2007 to 2016 use the following file:

Download ETSI\_Styles.dotm toolbar (52 kb)

For Word for Windows® 1997 to 2003 use the following file:

Download ETSI\_Styles.dot toolbar (47 kb)

NOTE: We cannot guarantee that it works under Windows® XP.



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# ETSI Drafting Rules (EDRs)



A very practical set of rules for drafting an ETSI Deliverable is the ETSI Drafting Rules document - commonly named "EDRs", which is available at <a href="https://docbox.etsi.org/Board/ETSI\_Directives">https://docbox.etsi.org/Board/ETSI\_Directives</a>. Every year, the ETSI Secretariat studies the necessity to review these rules.

This is why it is essential to make sure that you always have the latest updated version of the EDRs when writing your deliverable.

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## Set of rules



These set of rules state what is permitted and what is not when drafting an ETSI Deliverable. Depending on its nature, normative or informative, the rules are different.

Whether you are dealing with normative references or informative references, normative provisions and informative recommendations the rules are not the same depending on the type of ETSI Deliverable you are working on

European Harmonised Standards have specific rules which are not the same as with Technical Reports.

You will also find all verbal forms for the expression of provisions which are explicitly specified in the EDRs (see clause 3). Depending on the nature of your ETSI Deliverable – some provisions are not permitted.

#### Version adopted by the Director-General (29 March 2021)

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## Set of rules



Reproduction of third-party material is allowed only under very strict conditions in ETSI Deliverables, and this is the same with the use of tradenames and trademarks. Some communiqués have been produced to provide more guidance regarding these sensitive topics. All are available by clicking on <a href="https://portal.etsi.org/Services/editHelp/How-to-start/ETSI-Drafting-News">https://portal.etsi.org/Services/editHelp/How-to-start/ETSI-Drafting-News</a>

by the symbol ©.

#### 4.3.2 Reproduction of third parties text

Providing a reference to a third party text shall be preferred to reproducing such a text. Taking into consideration that a copyright authorization may be withdrawn at any moment from the copyright holder, the reproduction of

#### 4.2 Trade names and trademarks

The use of trade names and/or trademarks that are asserted and/or registered by their owners for designating particular products or services should be avoided in ETSI deliverables. Instead a corresponding standard should be used or a correct designation or a generic description should be given (see example).

EXAMPLE: Instead of "ZigBee®" refer to IEEE 802.15.4.

If, in exceptional circumstances, the use of trademarks/tradenames cannot be avoided, their nature **shall** be indicated by the symbols  $^{TM}$  for any trademark or  $^{\circledR}$  for a registered trademark.

I deliverables requires the author's authorization

#### d parties software elements

ode, the object code and the graphic interfaces may be protected by

'SI deliverables shall be avoided and in case it cannot be avoided, norization.

contamination of ETSI deliverables shall be assessed before

mtroducing such elements into £151 deliverables.

#### 4.3.4 Photographs

If a photograph shows a person and if there are doubts about the respect of the rights of personality of that person, a written confirmation that those rights have not been invaded and have been fully respected shall be obtained from the author of the photograph. If the authorization cannot be obtained the face of that person shall be blurred.



## Mature draft to be approved



Once the STF/TTF Leader considers that the draft is mature enough to be approved, a final draft has tobe issued for approval at the next meeting, or by correspondence, and check that its approval is announced in the TB meeting agenda.

The agenda has tobe circulated 30 days in advance of the TB meeting. The final draft should also be available 30 days in advance in order to ensure that delegates are given enough time to review it and prepare their comments.

When preparing the meeting agenda, the chair will usually take data from the <u>ETSI Work Programme</u> as an input, so here again, it is important that the <u>ETSI Technical Officer</u> and STF/TTF Leader are informed of any potential delay.

Guide to Writing World Class Standards

Rapporteurs' guide

STF/TTF Experts' guide

Chair's guide

Delegates guide

Member Official Contact's guide

NSOs guide

Meeting Hosts guide

Use of gender-inclusive language gu

# The use of gender-inclusive language guide



"Using gender-inclusive language means speaking and writing in a way that does not discriminate against a particular sex, social gender or gender identity, and does not perpetuate gender stereotypes. Given the key role of language in shaping cultural and social attitudes, using gender-inclusive language is a powerful way to promote gender equality and eradicate gender bias."

[statement from the United Nations on gender-inclusive language]



https://portal.etsi.org/Portals/0/TBpages/edithelp/Docs/Guides/Use\_gender\_inclusive\_language.pdf

The use of gender-inclusive language in ETSI deliverables





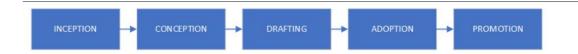
## Standards' production time



You may wonder how long it will take to get your ETSI Deliverable published?

We will answer that it first depends on the type of ETSI Deliverable you are producing. For example, the process is different if it is a GS or an EN.

All the details are available by clicking on <a href="https://portal.etsi.org/Resources/Standards-Making-Process/Process">https://portal.etsi.org/Resources/Standards-Making-Process/Process</a>.



The Standards Making Process (SMP) is the process applied for the Technical Organization's production of standards and deliverables and the Secretariat's involvement in and interaction with the Technical Organization, the ETSI members and the ETSI National Standards Organizations.

The general conditions for the SMP are defined by the ETSI Directives, in particular the Technical Working Procedures. The Secretariat's tasks and activities in SMP are primarily defined in the Quality Management System (QMS) documentation of ETSI Operations (OPS) Division.

#### Process overview

[process - a structured, measured set of activities designed to produce a specified output]

The objective of the ETSI Standards Making Process (SMP) is to convert market needs for standardization in the ICT area into ETSI deliverables (specifications, standards, norms, quides, reports) used in the market place.

The input to the process is an existing (as yet known or unknown) market need for standardization. The output is the broad application of the produced deliverables in the market place.

The SMP consists of five main elements, sub-processes, with their own distinct objectives, inputs and outputs. Each sub-process is defined to the level of which operational tasks are performed, and where in the ETSI organization they are performed.



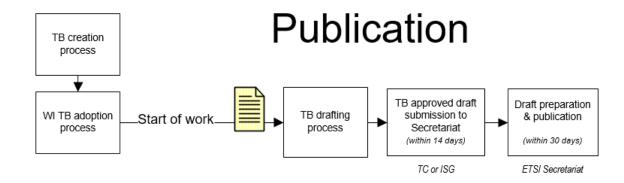
## Diagrams simplified GR - GS - TR - TS - SR



The process from draft received by ETSI Secretariat to publication for GR, GS, TR, TS and SR, can be very quick.

What makes the difference is the quality of the ETSI Deliverable received at the registration stage and if all potential blocking issues have been identified and dealt with before TB approval.

If the ETSI Drafting Rules have been respected, the deliverable can be published within 30 days, sometimes even less.



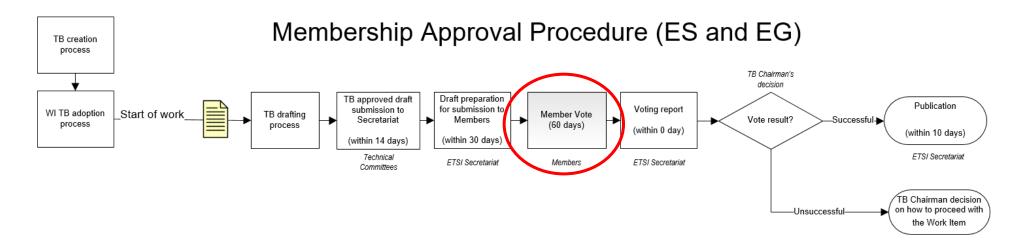


# Diagrams simplified ES - EG



The process to approve ETSI Standards (ES) and ETSI Guides (EG) is a bit longer than for the GS, GR, TR, TS and SR.

The process implies an ETSI member vote which takes up to 60 days.





# Diagrams simplified EN



The ENAP (EN Approval Process) used to approve the European Standard (EN) is quite complex.

Depending on the nature of the comments submitted during the approval procedure, the EN may have to be sent on a Weighted National Vote.

This will increase the number of days to publish the EN by at least 100 days minimum.

Therefore, it is important to prepare as best as possible the ETSI Deliverable for the first approval procedure.

Details are given in the ETSI Technical Working Procedures contained in the ETSI Directives in clause 2.2.1.1.1.



## Clean-up service



It is impossible to publish an ETSI Deliverable which is not compliant with the ETSI Drafting Rules.

To avoid such a situation, editHelp! proposes a service called "clean-up".

This service is dedicated to prevent any misunderstanding and thus helps raise all blocking issues and offers practical solutions before the approval of the draft.

All the details are available on the communiqué available at https://portal.etsi.org/Portals/0/TBpages/edithelp/Docs/New s\_from\_editHelp/ETSI\_clean-up\_service.pdf

#### ETSI clean-up service

#### What is a clean-up?

It is a light editing carried out on a draft being prepared for TB approval. If you would like to double check that the draft complies with ETSI Drafting Rules (EDRs) or if editing help is needed, then it is time to register your draft for a clean-up and inform editHelp!, the ETSI Technical Officer and or the ETSI

- The draft can be sent during the drafting stage (e.g. to get a clean version for a meeting for example). A quick editing (ETSI styles, figure/table numbering, etc.) is done by ETSI Editors within a short delay and potential problems are highlighted.
- Due to the impact the clean-up may have on the Editor's work schedule it is important to state when the clean-up needs to be returned by when it is sent to editHelp!.



Please avoid working on the draft while

#### What is the purpose of a clean-up?

The clean-up service has been put in place in ETSI to accelerate the approval of the draft and its publication. When the draft is submitted to ETSI for a clean-up, the ETSI Editors will alert you on issues that may delay or even block the publication of the draft. This means the draft could be amended before being sent for TB approval and if any major comments were noted during the clean-up process they can be discussed during the TB meeting and hopefully solved before the draft approval.

#### How long does it take?

### to check quality of an ETSI

les are required to comply with the ETSI Drafting Rules v I.

is checklist is to promptly check the quality of your deliver to the clauses that are common to all types of deliverables

#### Editing checklist Particulari the clause & elements

The title and version number shall be the same in the configuration of the programme (EWP).

NOTE: If there is a need to make a change in the ETS/ ETSI Committee Support Staff.

The Work Item reference shall correspond with Work Programme (EWP).

The keywords shall be selected from the

Ware to C ... Eri In

## **Editing checklist**



An editing checklist is available at <a href="https://portal.etsi.org/Portals/0/TBpages/edithelp/Docs/ETSI\_e">https://portal.etsi.org/Portals/0/TBpages/edithelp/Docs/ETSI\_e</a> <a href="mailto:diting\_checklist.pdf">diting\_checklist.pdf</a>.

It is recommended to compare the items presented on the list with the content of your ETSI Deliverable to make sure that it is compliant with the EDRs. If you have any doubts, we encourage you to contact the ETSI Secretariat (either the Technical Officer, the Support Standardization Professional or *editHelp!*) for support and to help you solve these issues.



## Some blocking issues

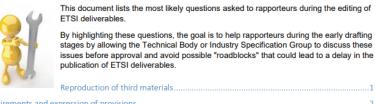


We have edited a document which lists the most frequent issues we encounter that will for sure block the publication of your ETSI Deliverable if not properly addressed beforehand.

You can access this document by clicking on <a href="https://portal.etsi.org/Portals/0/TBpages/edithelp/Docs/News\_from\_editHelp\_10\_most\_asked\_editing\_questions.p">https://portal.etsi.org/Portals/0/TBpages/edithelp/Docs/News\_from\_editHelp\_10\_most\_asked\_editing\_questions.p</a> df.

#### The questions you may be asked

How this document may help you



Requirements and expression of provisions	2
Trade names	2
Normative reference not publicly available	2
Added/unused references	3
Added/unused abbreviations	3
Subdivision of clauses ("hanging paragraphs")	4
Clause/figure/table numbering	4
Terms	5
Values and units	5
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# The links provided in this presentation are listed below



editHelp! website https://portal.etsi.org/Services/editHelp

How to use contribution tool on the ETSI Portal http://help.etsi.org/index.php?title=Contributions\_application

Frequently Asked Questions (FAQ) https://portal.etsi.org/Services/editHelp/To-help-you-in-your-work/FAQs

User Guide Timesheets Application Management https://portal.etsi.org/Portals/0/Users/123/39/2939/User%20Guide%20-%20Timesheets%20Application%20Management\_2016JAN25\_vELR\_revYSA\_Final.pdf

STF/TTF contact details https://portal.etsi.org/STF/STFs/Summary/Contract-details\_THC

Travels & payments https://portal.etsi.org/STF/STFs/Summary/Travel-organisation-and-reimbursement

How to get in touch with editHelp! https://portal.etsi.org/Services/editHelp/Contact-Us

ETSI booklet on how to draft ETSI Deliverables https://www.etsi.org/e-brochure/WritingWorldClassStandards/mobile

Advanced search for ETSI Deliverables https://portal.etsi.org/webapp/WorkProgram/Expert/QueryForm.asp

editHelp! email address mailto:editHelp@etsi.org

Application to update your personal details https://portal.etsi.org/webapp/teldir/PersonalInfo.asp

Find all ETSI skeletons (pre-built deliverables) https://portal.etsi.org/Services/editHelp/Standards-development/Drafting/Skeletons

Step by step guide to help you drafting https://portal.etsi.org/Portals/0/TBpages/edithelp/Docs/Principles\_for\_drafting\_ETSI\_deliverables.pdf

 $Short\ cut\ to\ ETSI\ styles\ \underline{https://portal.etsi.org/Services/editHelp/Standards-development/Drafting/Styles-toolbar}$ 

ETSI Drafting Rules https://portal.etsi.org/Services/editHelp/How-to-start/ETSI-Drafting-Rules

ETSI Directives https://docbox.etsi.org/Board/ETSI\_Directives/

News from editHelp! https://portal.etsi.org/Services/editHelp/How-to-start/ETSI-Drafting-News

Information on the ETSI Standards Making Process <a href="https://portal.etsi.org/Resources/Standards-Making-Process/P

Clean-up service (information) <a href="https://portal.etsi.org/Services/editHelp/To-help-you-in-your-work/Services/Clean-ups">https://portal.etsi.org/Services/editHelp/To-help-you-in-your-work/Services/Clean-ups</a>

Editing checklist https://portal.etsi.org/Services/editHelp/Standards-development/Drafting/Editing-checklist

Question you may ask yourselves when drafting https://portal.etsi.org/Services/editHelp/Standards-development/Drafting/10-editing-questions-you-may-be-asked





Please share your opinion with us on this presentation

Tell us at <a href="mailto:editHelp@etsi.org">editHelp@etsi.org</a>