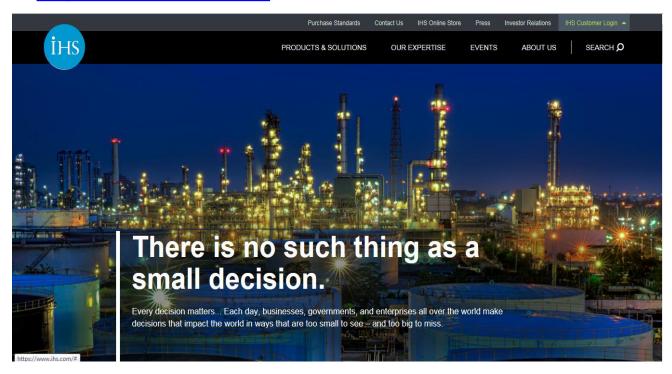
# IHS Standards Expert Training Manual



## IHS Standards Expert Table of Contents

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#### Login from the Internet



Enter www.ihs.com in your internet explorer url bar.



On the right hand side of the screen click on Customer Login and from the options select IHS

**ERC** 



Enter the Login name and Password that has been issued.



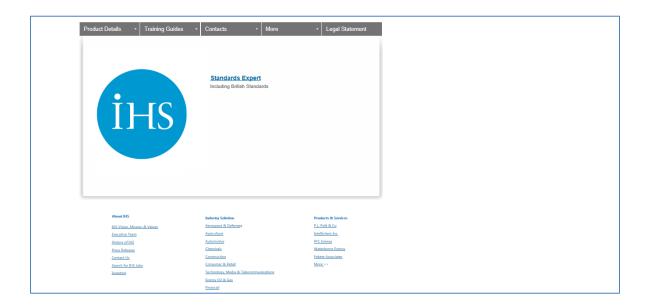
NB: If this is the first time that the login has been used on this computer, registration will need to be completed in order for personal profiles to be used. (See following pages).

Click on the Submit button.



NB: On all future logins use the generic Login name and Password and if registered you will be taken directly to the specific Landing Page

#### **Login from the Intranet**



In some instances login to **IHS Standards Expert** will be done through the company Intranet page.

From the intranet page there will be a link which goes directly to the **IHS page**.

When the link has been selected a screen similar to the above will be shown. From here there you have access to a variety of different areas of the IHS Website.

If this is the first time accessing the product click on the link to **register for Standards Expert** then follow the instructions on the screen.

Click here to register for Standards Expert

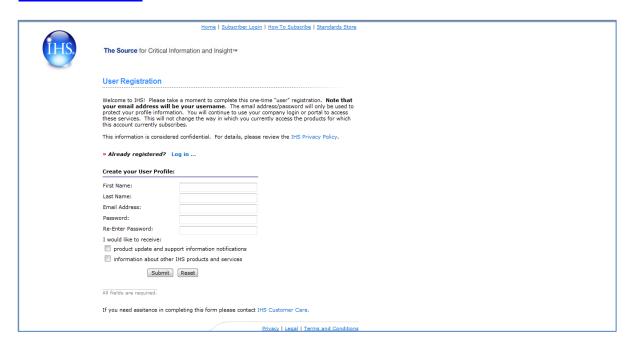
Once registered or if registration was completed on a previous visit to the page click on the **Log into Standards Expert** link. This will then go directly to the product.

After you have registered above

Click here to log into Standards Expert

NB: Design of the intranet pages may vary

#### Registration



The Registration screen will ask for basic details of the user.

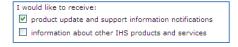
Enter details such as Name, Last Name and E-mail address.



Enter a Password for the account.



Use the tick boxes to request **Product Updates** or **Information on other IHS Products**. Leaving these deselected will ensure that this information will not be sent.

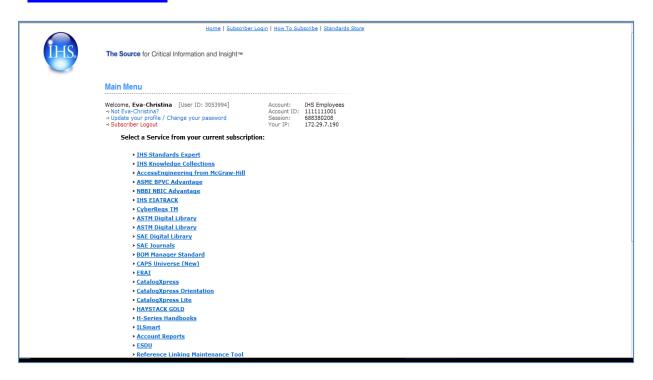


Click on the Submit button.



**NB:** This username and password will be used for making any changes to your account profile. They will not be used to **Login** to **IHS ERC.** 

#### **Landing Page**



From the Landing Page it is possible to do the following;

**Login as a different user**: ERC Logins are linked to IP Addresses of a computer. If a shared computer is being used to login use this link to change account details.

**Update your profile**: change the details on the account profile that were entered at registration, i.e. remove or add the request for product updates and information.

Subscriber logout: logout of the ERC database.

Underneath these links there is a list of products that the company has subscribed to. Click on the link for **IHS Standards Expert**.

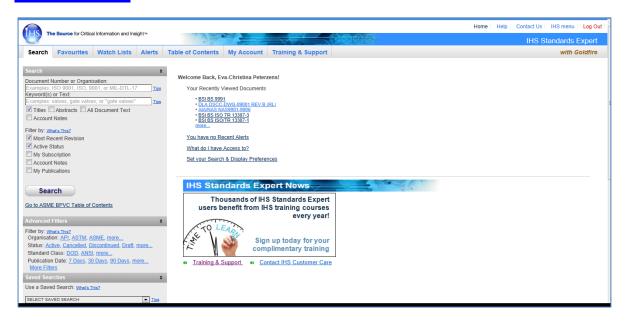
Select a Service from your current subscription:

> IHS Standards Expert

> IHS Knowledge Collections

> AccessEngineering from McGraw-Hill

#### **Home Page**



The **Standards Expert** product is sectioned by **Tabs**. The system will default to the **Search** tab on login. This is considered to be the **Home Page**.

The **Home page** is in 3 sections;

Search Panel: the area where criteria will be entered and refined to search for the

document required.

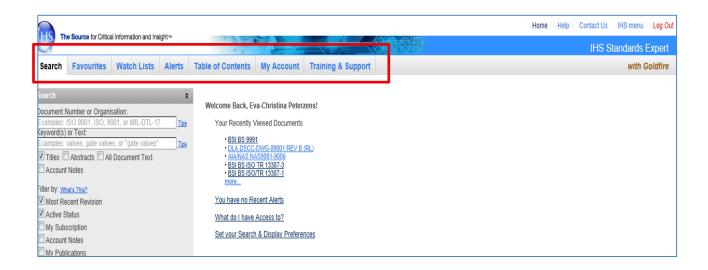


**Personal Profile**: shows information with regards to the user currently logged onto Standards Expert. This section also has quicklinks to access specific areas directly.



IHS Standards Expert News: newsletter with information regarding the Standards Expert product.

#### **Home Page - Tabs**



**Favourites**: will list all favourites that have been added to this account. Ability to add notes to documents, remove from the favourites list and download to an Excel document.

**Watch Lists**: shows all watch lists that have been set up by the user. These can be shared with other users, and used to track important changes to standards

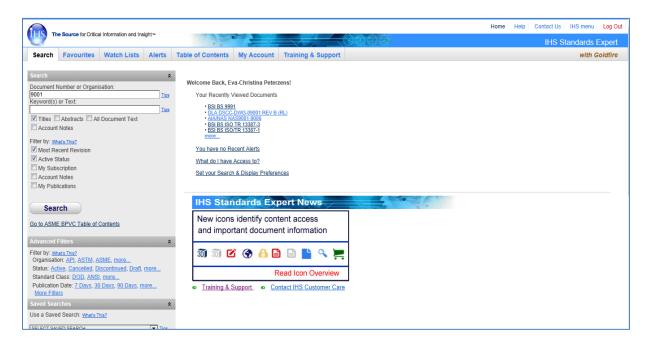
**Alerts**: shows any alerts that have been set up. This section will advise if an alert has been sent on either a **Watch List** or a document added to **Favourites**.

**Table of Contents**: this tab is specific to the ASME Boiler and Pressure Vessel Code's. The list will give direct access to a specific code if your company has subscribed to ASME BPVC.

**My Account**: gives an overview of the account, alerts etc. It also enables changes to be made to user preferences and gives the ability to view the subscription information.

**Training and Support:** information regarding help and support that is available as links through the Standards Expert product.

#### **Searching - Basic**



To search by **Document Number** go to the **Search** panel and enter the number directly into the Document Number or Organisation field.

To search for keywords use the **Keyword(s)** or **Text** field in the **Search** panel. Select the tick boxes to indicate areas the search engine will look in.

**And/Or Search**— to search for x and or x type the words into the search field, i.e. quality management searches for any documents including the words quality and/or management

Phrase Search – to search for phrases use "xxx" i.e. "quality management"

**Wild Card Search** – to replace a word or string of characters use \*, i.e. Enviro\* will return documents with Environment, Environmental, Envirosafety etc.

Use the tick boxes to select how to further filter the results i.e. by **Revision, Active Status,** within the **Subscription** or within **Account Notes**.

When all criteria is entered click on the **Search** button

✓ Most Recent Revision✓ Active Status✓ My Subscription✓ Account Notes

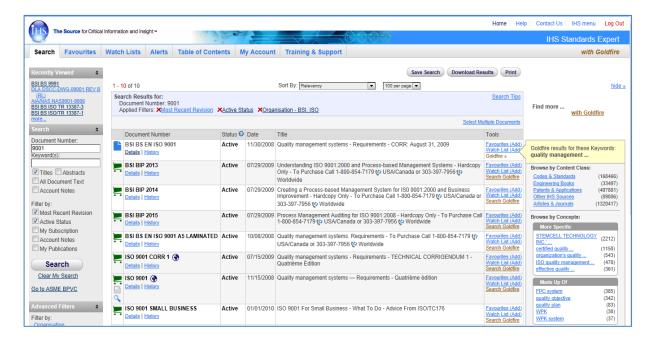
Tips

Document Number or Organisation:

▼ Titles □ Abstracts □ All Document Text

Account Notes

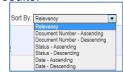
#### **Results Screen - Options**



To remove an applied filter use **Search Results for**. Click on the **x** at the side of the filter to be removed.



To change the order of the results click on "Sort by" at the top of the results.

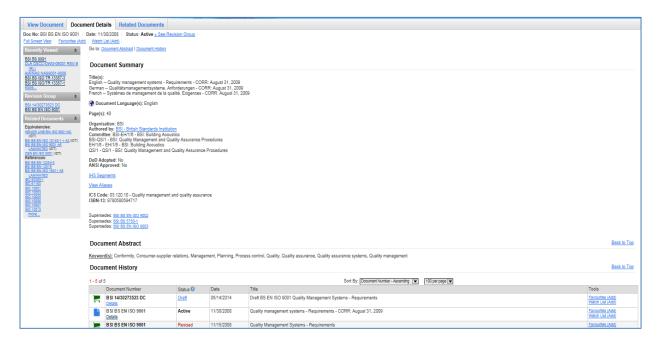


To download the list into an Excel document click on the Download Results button.



To view further detail regarding a document click on the **Details** link in the **Document**Number column

#### Results Screen - Detail & History

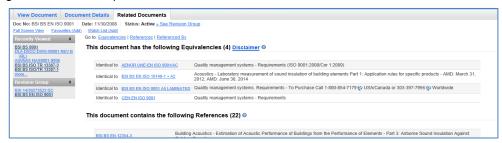


Information about and access to the document is split into 3 tabs.

The left hand panel of the screen will remain the same throughout the 3 tabs. This gives information regarding **Recently Viewed** documents and any related documents to the standard being viewed.

**Document Details** – information regarding the document. This will include a **Summary** of the document, document **Abstract** and any associated **History** 

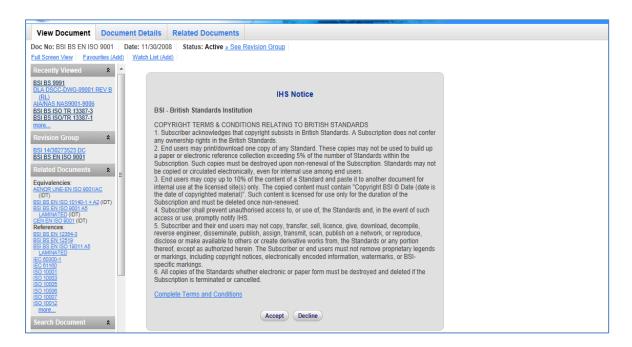
**Related Documents** - a list of any documents that are cross referenced to this standard. This tab will give a short description of the document



**NB:** Clicking on the **History** link on the **Results** screen will bring you to the same screen as above but will direct the screen to the **Document History** section.

**View Document** – ability to view the document directly from this tab

### View a Document



To view the document click on the **View Document** tab.



When the screen is displayed click on the **Accept** button to confirm the Copyright for this publisher has been understood and agreed to.



**NB:** Copyright confirmation is only needed once per session for each publisher.

When the **Accept** button has been selected the document will open in the window. To view this in a full screen click on the **Full Screen View** link.

To return the screen to show all product features i.e. **Related Documents** and **History** tabs, click on the **Restore Product Features** link on the top left.

#### **Working with the Document**



Once the document is open full use of Adobe Acrobat tools will be available.

Cut and paste an extract from the document in the normal way. (Ensure that the extract is referenced in the document it is pasted too)

The document can be saved to the desktop but this is not recommended as it may have been revised and therefore the saved version will not be the most up to date.

To ensure that the most current documents are being used or referenced always access them from **Standards Expert**.

If the document is to be printed please ensure that the **Copyright** laws pertaining to this have been read and understood.

#### **Copyright**



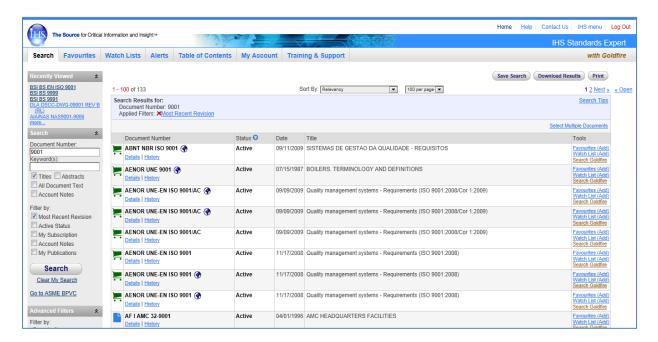
Each publisher will have their own **Copyright** in place for these documents. The copyright agreement will be shown on the first instance of accessing a document by the publisher.

BSI are known to have the most stringent of copyright laws. A synopsis of these is shown below:

- You may not e-mail these documents to anyone, either within the organisation or externally.
- You can copy and paste up to 10% from a standard into an internal document.
- You can copy and paste up to 10% from a standard and send it via e-mail to an internal colleague.
- Always reference the standard the extract was taken from

To ensure total compliance with Copyright Laws please read the full Copyright of the Publisher before downloading or taking extracts from any documents.

#### **Refining the Search**



Further refining of the results can be done by using the Advanced Filters.

To narrow the results by publisher click on the **Organisation** link.



Select the organisation to be viewed. To view more than 1 organisation hold the **Ctrl** key down and select all organisations required then click on the **Submit** button.

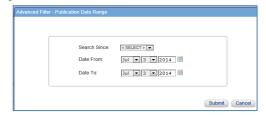


To narrow the results by document **Status** or **Standard Class** use the same process as above.

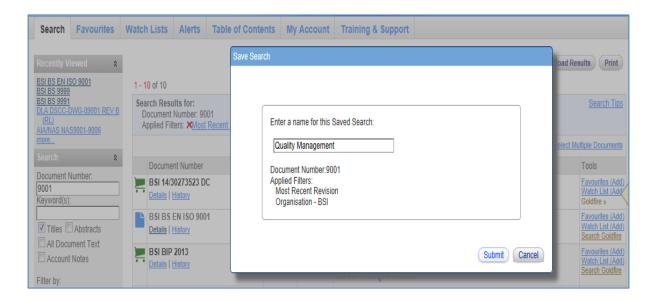
The results can also be refined by entering a date range for publication. Click on the **Publication Date** link.

Filter by:
Standard Class
Publication Date
more

Use the drop down boxes to select the date range that is to be viewed.



#### **Saving Searches**



Once a search has been created it can be saved if it is to be used on a regular basis.

Set the criteria to be used for the search then click on the **Save Search** button.



A dialogue window will be displayed, enter a unique name for the search so that it can be located easily in the future then click on the **Submit** button.

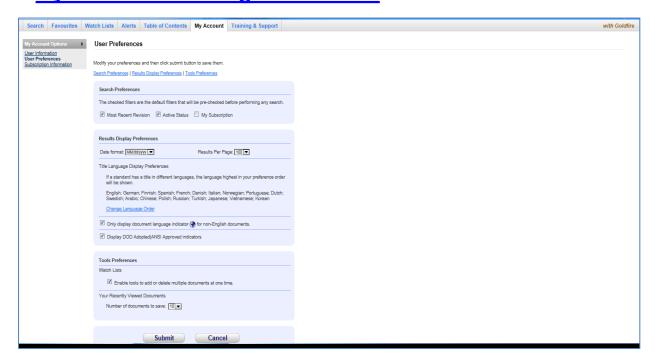


The system will confirm that the search has been saved. Click on the **OK** button.



Once saved, the search can be accessed by using the dropdown in the **Saved Searches** panel.

#### **My Account - Setting Preferences**



To set preferences for the account click on the My Account tab from the Homepage.



In the My Account Options panel click on the User Preferences link.



**Results Display Preferences**: Use the dropdown box to select the **Date format** and the **Results per Page**. Select the order by language of the title of the document



F Enable tools to add or delete multiple documents at one time.

**Tools Preferences**: select the tick box to allow multiple selection of documents to be added to a **Watch List**.

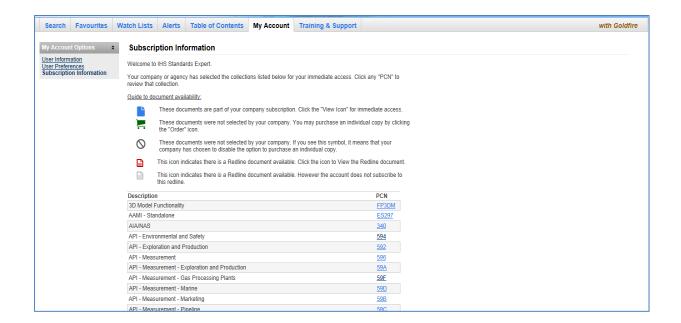
Use the dropdown to select how many **Recently Viewed Documents** will be listed on the account profile.

Your Recently Viewed Documents

Number of documents to save: 10 💌

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#### **My Account – Subscription Information**



To view the document collections that the company currently subscribes to click on the **Subscription Information** link in **My Account Options**.



A screen will be displayed that will give the full list of collections in alphabetical order.

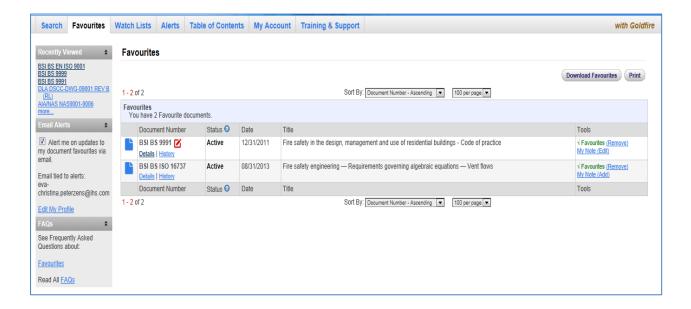
The quickest way to search this list for a particular collection is to use **Ctrl +F** from the key board and enter the search word.



The **PCN** column shows the **Product Code Number** for the section that the document 'belongs' to. To view all documents in this section click the link in the **PCN** column.



#### **Favourites**



The favourites list can be used for easy access to the most commonly used documents.

To add a document to the favourites list when the search has been completed click on the **Favourites (Add)** link in the **Tools** column on the **Results page**.



Confirmation that the document has been added will be shown by the **Favourites (Add)** link turning green.

To view favourites click on the **Favourites** tab on the **Homepage** this will display the screen seen above

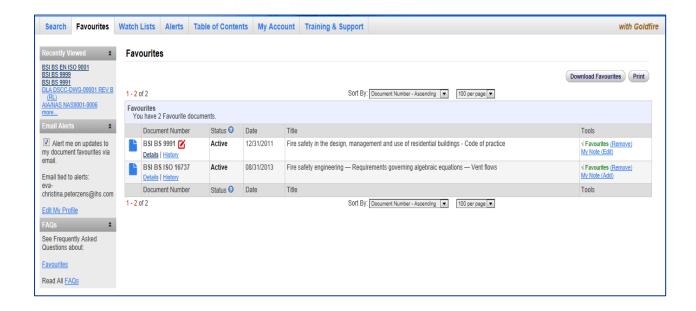
Download the favourites list into an Excel document by clicking on the **Download**Favourites button.

My Account Training & Support

Download Favourites

√ Favourites (Remove) Watch List (Add) Search Goldfire

#### **Favourites - Cont**



Print the favourites list by clicking on the **Print** button.



To remove a favourite from the list click on the (Remove) link in the Tools column...

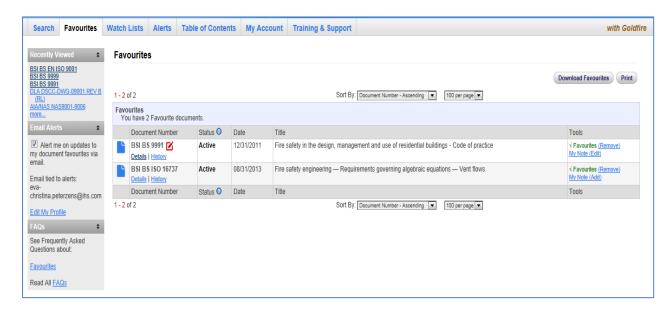


If a document is updated on the system the **Document (Update)** link will show in the **Tools** column. Click on this to update the document in favourites to the most current version.



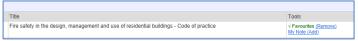
**NB:** To retain a previous version of a document it must be added again to the favourites via the search engine. This will only be possible if the company subscribes to the Historical Document segment.

#### **Favourites – Adding Notes**



A specific note can be added to a document in **Favourites**. This can only be viewed by the user adding the note.

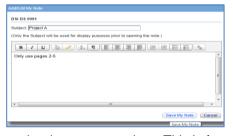
Click on My Note (Add) in the Tools column.



Use the **Subject** field to enter a unique title for the note. This will be displayed underneath the document name when the note is saved.



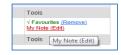
Enter the note to be added to the document then click on the Save My Note button.



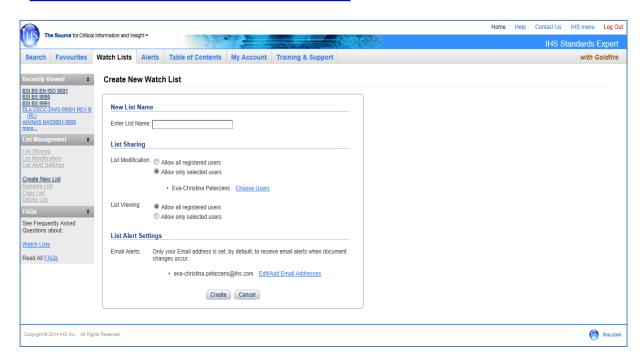
Document Numb

When saved, a link to the note will be displayed next to the document number. This is for viewing purposes only.

To edit the note click on My Note (Edit) in the Tools column



#### Watch Lists - Create a New List



To create a new watch list click on the Create New List link.



Enter a List Name that will make the contents identifiable.

Use the radio buttons to select who can **Modify** or **View** the list. If **Allow only selected users** is chosen click on the **Choose Users** link.

When the **Choose Users** link is used a list of users will be shown. Select the user and use the arrows to add to list. Click on the **OK** button once finished.



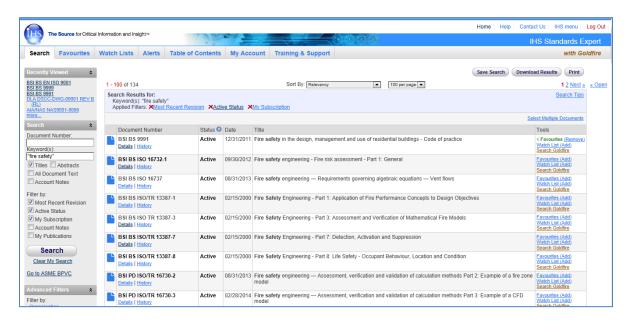
To set up alerts for specific users click on the **Edit/Add Email Addresses** link. Enter the **New E-mail** addresses to be added, click on the **Add Email** button then click on **Submit**.



Once all criteria is selected click on the Create button



#### Watch Lists - Add Documents to the List



Documents can be added to a watch list from the **Results** page of a search.

If just one document from the search is to be added click on the **Watch List (Add)** link in the **Tools** column.

Tools

Favorites [Add]

Watch List (Add) link in the Tools column.

To add more than one document click on the **Select Multiple Documents** link.



**NB**: This functionality will only be available if it has been set up in preferences on the **My Account** tab.

A new screen will be shown with a tick box column. Select the tick box against each of the documents that are to be added.

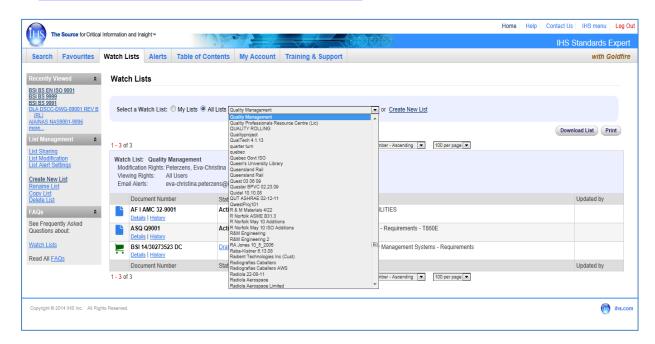


When the document selection has been made select the Watch List (Add) link.



Use the dropdown list to select the watch list to which the documents will be added then confirm the selection by clicking on the **Submit** button.

#### Watch List - View a Current List



The watch list functionality enables a list of frequently used documents to be created and shared among an entire team unlike the **Favourites** tab which is specific to the registered user.

To view an existing watch list click on the **Watch Lists** tab.



Use the radio buttons to select which lists are to be viewed:

**My List**: shows all lists that have been created by the registered user or where they have been specifically selected to modify or view.

**All Lists**: shows everything in **My Lists**, and lists created by other users whether or not the user can modify them.

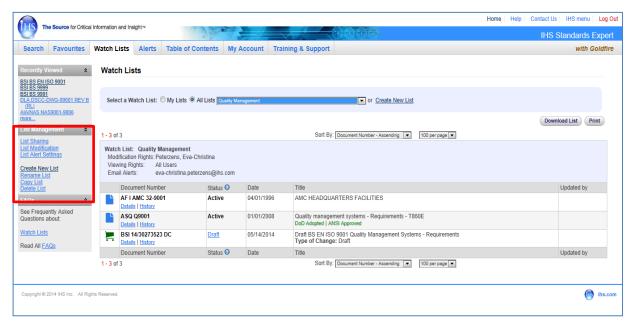


Use the drop down to select the watch list to be viewed.



The screen will refresh and show a results page based on the Watch List selected.

#### Watch Lists - List Management



From the List Management Panel it is possible to delete, rename or copy a list.

To carry out any of these functions the list required needs to be selected from the dropdown.



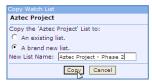
To delete a watch list select **Delete List** in **List Management**, then confirm by clicking the **Delete** button.



To rename a watch list select **Rename List** in **List Management**, enter the new name for the list then click on the **Rename** button.

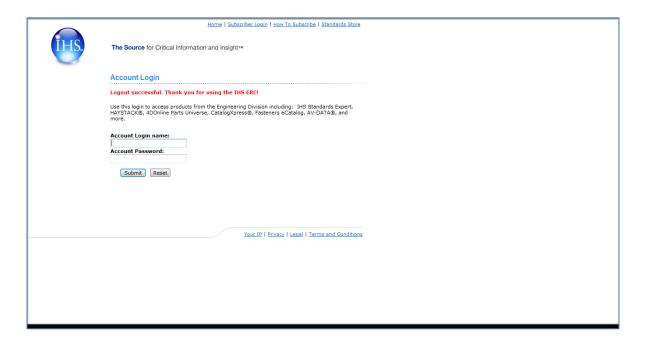


A watch list can be copied to either an existing list or a to a new one. Select **Copy List** in **List Management**. Enter a **New Name** for the list then click on the **Copy** button.



NB: when a list is copied all settings such as users that can view or modify a list will be copied.

#### **Logging Out**



Logging into IHS uses a licence that has been purchased with the subscription.

Generally there will be more logins than licences ensuring that only a certain amount of users can access IHS at any one time.

If a user is not logged out correctly another user may not be able to log on.

Select **Log Out** on the toolbar to log out correctly. Do Not use the x in the corner of the window.

Home | Help | Contact Us | IHS menu | Log Out

→ Login as a different user → Update your profile → <u>Subscriber Logout</u>

IHS will display the screen shown above which confirms that logout has been completed successfully.

Where an alternative product within **IHS ERC** is to be used then use **IHS menu** on the toolbar. This will direct the screen to the 'Landing page' showing a list of products available.

To log out from the Landing page use **Subscriber Logout**. This will display the screen above which confirms that logout has been completed successfully.

**NB:** 'Time out' after 15 minutes of inactivity will happen automatically in order to release the licence.