

IHS Specs & Standards

Gatekeeper Tip Sheet - Managing Document Lists and Purchases



The IHS Specs & Standards Gatekeeper System is designed to allow your company to purchase documents outside of your subscription while assisting in controlling costs against your company's individual document purchasing budget. The Gatekeeper system is available at no extra cost if you are an IHS Specs & Standards subscriber.

Once enabled, the Gatekeeper system allows all users to order documents, but the orders are placed in a pending order queue for review by a Gatekeeper Approver or Approvers. An approved threshold level can also be set. Order totals equal to or less than the approval threshold level are automatically processed without Gatekeeper approval.

To perform the function of a Gatekeeper Administrator or a purchase Approver, you need to be registered with your unique username/password and profile information. Registering allows you to purchase documents outside of your subscription, create and view document Lists, save searches, view and approve pending orders, and track purchases.

Gatekeeper Administrator Set Up and Login

Once you have identified your company's Gatekeeper Administrator and sent that information to IHS, IHS sets up the employee as the Administrator for your account.

The Gatekeeper Administrator can establish an Approval Threshold amount, approve or reject document orders, and add or remove additional Gatekeeper Approvers. The additional Approvers can also view and accept or reject orders. There is not a limit to the number of approvers that can be set up.

1. Once IHS has completed the Gatekeeper Administrator set up, the Administrator receives an e-mail similar to the one below with a link to the IHS Gatekeeper Administration System.

Customer Service @ihs.com
Date / Time
To: john.smith@abc.com
Subject: IHS Specs3 Gatekeeper Administrator Status

Dear John,

You have been added to the IHS system as the Gatekeeper Administrator. Please use the following link to set up your account.

<https://products.ihserc.com/GatekeeperAdmin/login>

Thank you,
IHS

Support: <https://www.ihserc.com/support/>

Gatekeeper Administrator Set Up and Login *(continued)*

- Click on the URL link within the e-mail (or enter the URL link from the e-mail in your browser), and press **Enter**. On the login screen, enter your unique registration username and password.

The IHS Gatekeeper Administration Tool opens, allowing the Administrator to set up the account. The following functions are available:

- Add/Remove Approvers
- View Pending Orders
- Update User Profile
- Set the Approval Threshold Amount
- Change Subaccounts

Add/Remove Approvers

An Approver is someone the Gatekeeper Administrator has set up to approve items that other personnel in your company have searched on, put in their Shopping Cart, and now want to purchase. The Gatekeeper Administrator is automatically set up to be an Approver. Allowing other Approvers to view and approve or reject pending orders is especially useful if the Administrator is frequently unavailable and would like to establish additional Approvers.

Approvers the Administrator sets up can view pending orders and update their own profile information, but they cannot set the approval threshold limit or add/remove other Approvers, only the Gatekeeper Administrator can perform those functions.

Add/Remove Approvers *(continued)*

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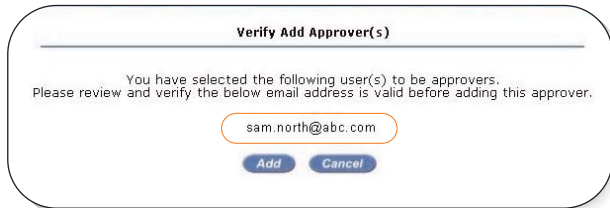
Approvers the Administrator sets up can view pending orders and update their own profile information, but they cannot set the approval threshold limit or add/remove other Approvers, only the Gatekeeper Administrator can perform those functions.

To Add/Remove Approvers:

- Click the **Add/Remove Approvers** tab on the *Gatekeeper Administration Tool* screen.
- Enter all or part of the user's last name, and then click the **Search** button. The Approver must be a registered user or his or her name will not appear.
- A list displays of registered users matching the last name you entered. If the person is not listed, click the **Create New User** button to register and add the person as a Gatekeeper Approver.

Add/Remove Approvers (continued)

- Verify that the email address for the Approver is correct, and then click the **Add** button.



- The new Approver has been added and now appears on the list of Approvers.

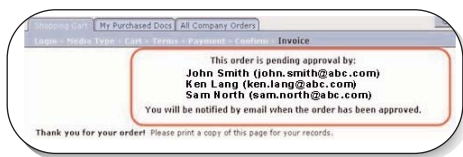


- The Approver receives an email from the Gatekeeper system with a link to the *Gatekeeper Administration Tool* screen.
- The new Approver logs into the Gatekeeper system using his or her unique username and password.

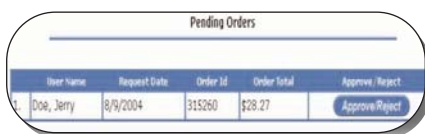
Approver Process

The Approval process begins when someone in the organization uses the Shopping Cart to purchase a document. A pending order message displays on the *Shopping Cart Invoice* screen.

- The Approvers (including the Gatekeeper Administrator) receive email notification that there is a pending order.



- The Approvers log into the Gatekeeper system with their unique username and password, and click on the **View Pending Orders** tab.



Approver Process (continued)

- The *Pending Orders* screen displays with the User Name (the person requesting the purchase), the Request Date, the Order ID, and the Order Total. The Approver clicks the **Approve/Reject** button and the *Order Details* screen displays.



- When you click the **Approve** button, the order is automatically charged to a Deposit Account or a Blanket Purchase Order. The original requester receives an email notifying him or her that the order has been approved. A link is provided in the email, allowing the original purchaser to go to the invoice and click on the **Doc No** (blue link) to download the document.
- When you click the **Reject** button, you can enter a reason for the rejection, in which case the original requester receives an email stating the order was rejected and why.
- Click the **Pay with Credit Card** button if you do not want to charge your Deposit Account or your Blanket Purchase Order. Enter your credit card and billing information and click the **Approve** button. The original requester receives an email notifying him or her that the order has been approved. A link is provided in the email, allowing the original purchaser to go to the invoice and click on the **Doc No** (blue link) to download the document. Hard copy documents are shipped via the method specified by the requester.

Additional Gatekeeper Administration Tool Options

The Gatekeeper Administrator can also update their user profile information or change subaccounts and manage pending orders for a different subaccount.

Note: Approvers can also update/change their profile.

Update My Profile

To update a profile:

1. Log into the Gatekeeper Administration System, and on the *Gatekeeper Administration Tool* screen, click the **Update My Profile** tab.
2. On the *Registration* screen enter your new information in the appropriate field(s) and click **Submit**.

Change Subaccounts

A Gatekeeper can manage pending orders for as many subaccounts to which they have been assigned. For example, a company may have several subaccounts for separate locations, but the same Gatekeeper for each subaccount.

To manage a subaccount:

1. On the *Gatekeeper Administration Tool* screen, click on the **Change Sub Account** link.
2. Enter your unique registration username and password.
3. Select the subaccount you want to manage.
4. Review the pending orders and accept or reject the order.

Approval Threshold

Approval Threshold amounts are established to allow for automatic purchase approval, simplifying the ordering process. Order totals that are less than, or equal to, the Approval Threshold will not be routed for approval. These orders are processed automatically for the individual purchasers.



The screenshot shows a web interface with three tabs: "Add/Remove Approver(s)", "View Pending Orders", and "Update My Profile". The "Update My Profile" tab is active. Below the tabs, there is a form field labeled "*Approval Threshold (dollars)" with a text input box containing ".00" and a "Submit" button.

Only a Gatekeeper Administrator can set the Approval Threshold amount, which is set at a default of \$0.00. The \$0.00 amount routes all individual purchases pending in the Shopping Cart to the Gatekeeper Administrator (and any additional Approvers) to review the pending orders.

To change the Approval Threshold, the Gatekeeper Administrator can simply type in a dollar value, and then click the **Submit Changes** button.



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