IHS Specs & Standards

Lists Tip Sheet - Managing Your Documents

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The Lists feature of IHS Specs & Standards allows you to set up personal and group document lists, which provide a method for quickly retrieving frequently needed documents. You can also set up the Email Notification feature, which sends you an email informing you of any updates or revisions to the documents in your list(s). Email Notification can save you the time and trouble of constantly verifying that the documents on your list, which you may be using on a project for example, are current and that you are continually compliant.

Registration

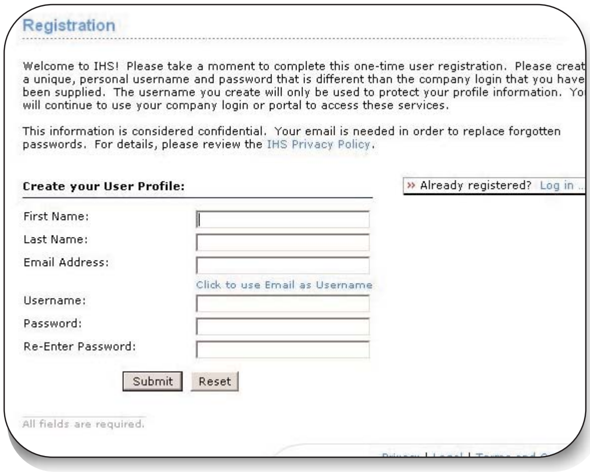
In order to use the List feature, you must first create a user profile. This allows the system to recognize and register you when you login and keep track of the lists you create. To store your profile information, you must have cookies enabled on your system.

Important Note: IHS does not sell or rent online user information to other companies and you will not receive unwanted spam as a result of completing this registration form.

1. Go to http://www.ihs.com and click **IHS Login**.
2. On the Login Menu, select **Login - IHS Engineering Division - ERC**
3. Enter your account username and password, and click **Submit**.

   If you have already registered but have deleted cookies from your machine or you are using a new machine, click the Log in link and enter the user name and password you used with your initial registration. It is not necessary to re-enter all of your profile information.

3. If you have not registered, a Registration screen is displayed after you enter your account username and password, prompting you to register. Enter your information in the appropriate field (all fields are required), and then click **Submit**.


Registration

Welcome to IHS! Please take a moment to complete this one-time user registration. Please creat a unique, personal username and password that is different than the company login that you have been supplied. The username you create will only be used to protect your profile information. Yo will continue to use your company login or portal to access these services.

This information is considered confidential. Your email is needed in order to replace forgotten passwords. For details, please review the IHS Privacy Policy.

Create your User Profile:

» Already registered? Log in ..

First Name:
Last Name:
Email Address:
Click to use Email as Username
Username:
Password:
Re-Enter Password:

Submit Reset

All fields are required.

Creating a Document List

To quickly create an empty List so that you can add documents to it later:

1. Click the **View Lists** button on the main search screen menu bar.

2. A secondary window opens, which is the *View My Lists* screen. Click the **Create List** button on this screen.

3. On the *Create List* screen, enter a descriptive name in the **List Name** field (up to 20 characters) and then set your **Secure List** and **Private List** settings.

If you set **Secure List** to **Yes**, only you (as List Administrator) can modify the document list, whom has access, and the Email Notification list. This might be important, for example, to ensure that the integrity of a collection of standards you are using for a major project is maintained. If you set the **Secure List** to **No**, any users other than yourself that are using the same login and password, such as your project group, can add documents to the list, delete the list, and/or modify whom has access to the list.

If you set **Private List** to **Yes**, only you (as List Administrator) or any registered user to whom you grant viewing rights, can view the List. This might be important in bid solicitation situations where privacy is of great concern. If you select **No**, the list can be viewed by any registered user sharing the login name and password and/or that you have granted viewing rights to.

Note: By default, Secure List is set to Yes and Private List is set to No.

4. Once you have entered a list name and set your list settings, click **Submit** to return to the *View My Lists* screen.

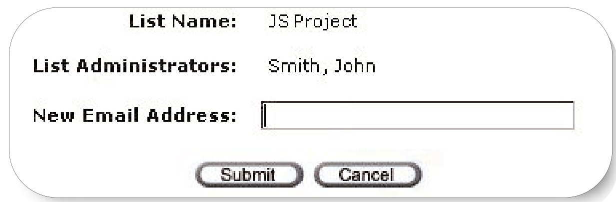
5. Click the **Close** button to close the *View My Lists* window and return to the main search screen. 

Email Notification

To set up your email address and the email addresses of other individuals that can be notified of document updates:

1. Click the **View Lists** tab on the main search screen.
2. On the *View My Lists* screen, click the **Email Notification** button.

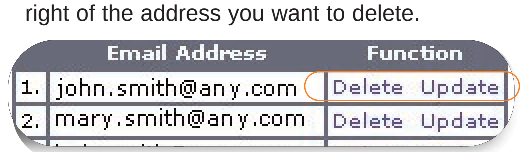
3. On the *Email Notification* screen, add your email address, and then click **Submit**.



Enter an email address for each individual that you want to be notified of updates. If the list was not set up as a Private list, you can have each individual add his or her own email address.

Modifying Emails

1. Return to the *View My Lists* screen, click on the pull-down menu,and then select a List.
   Note: By default, when you first login and go to the *View My Lists* screen, the List field displays **!empty** until you make a selection.
2. Click the **Email Notification** button to open the Email Notification screen.
3. To delete an email address, click the **Delete** link to the right of the address you want to delete.

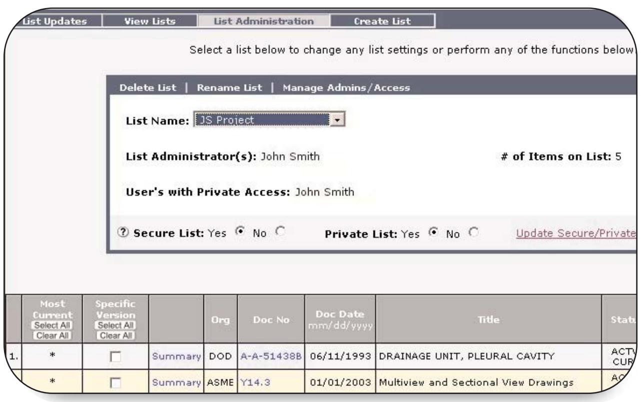


4. To change or update an email address, click the **Update** link, enter the new information, and then click **Submit**.
5. To add a new email address, enter the address in the **New Email Address** field, and then click **Submit**.

List Administration

The List Administration feature allows you to manage access to lists, modify document versions, manually check for document updates, delete or rename your document lists, delete individual documents from lists, and view Document History reports. To use the List Administration feature:

1. On the main search window, click the **View Lists** tab.
2. On the *View My Lists* screen (or *View All Lists*), click the **List Administration** tab.
3. On the *List Administration* screen, click on the **List Name** pull-down menu to select the list you want to modify and/or manage.



4. To check if documents on the list have recently updated, click the **List Updates** button on the top menu bar to open the *List Updates* window.
5. To rename a list, click the **Rename List** button.
   Note: List names can contain up to 20 alphanumeric characters, including spaces.
6. To manage list access and administration rights, click the **Manage Admins/Access** button to go to the *Manage Admins/Access* window and click the **List Administrator** and/or **View Only** check boxes for those individuals you want to grant administration or viewing rights to.
8. To change the secure and private settings, click the **Secure List** and/or **Private List** radio buttons as necessary and then click the **Update Secure/Private Settings** link. (See *Creating a List* for more information.)
9. To modify the document version, if you want to change the **Most Current** version to a **Specific Version** of the documents or a **Specific Version** to a **Most Current** version, click the available check boxes in the third and fourth columns as necessary, and then click the **Update Documents on List** button.
10. To *replace* a **Specific Version** of the document with the **Most Current** version, click the check boxes in the **Replace** column (second from the end) to indicate the documents you want to replace, and then click the **Update Documents on List** button. To replace all of the documents, click the **Select All** button at the top of the **Replace** column.
11. To delete individual documents, click the check boxes in the last column (labeled **Delete**) of the document(s) you want to delete, and then click the **Update Documents on List** button. You can also use the **Select All** and **Clear All** buttons at the top of the column as necessary.

Adding Documents to Your List

1. Perform a search and in the result list, click the **check boxes** in the far left column for the documents you would like to add to your list. If you want to add all of the documents on the results list, click the **Select All** button.
2. Once your documents are checked, click the **Add to List** button to open the *Add items to List* screen.
   Note: For optimal performance, you are limited to 1000 documents per list.

3. On the *Add items to List* screen, click on the pull-down menu to select the list you want if it is not already displayed, and then click **Submit**. A message window displays, which allows you to select OK to add documents or Cancel if you want to go back and change versions.
   Note: If you leave the default of **Most Current** selected, when you view your list, only the most current document is listed because documents in IHS Specs & Standards are automatically updated. If you select **Specific Version,** that version of the document remains (for a limited time) in your list, even though the document itself continues to update. You might want to use a specific version, for example, if you are developing an item based on a specific version of a standards document.
4. Click **OK** to continue.

Viewing Lists

You can view your list from any search screen in IHS Specs & Standards by clicking on the **View Lists** tab. On the *View My Lists* screen, all the lists you have created are in the **List Name** drop-down list, which is arranged alphabetically.

You may also use the **Browse/Refine search by** tab to obtain a search results list based on a List you previously created.

The two buttons on the *View My Lists* screen, **All Lists** and **My Lists**, allow you to toggle back and forth from all the lists you can view to just your personal document lists. If you want to see just the lists you have setup as List Administrator with **Private List** access, use the **My Lists** button. If you are setup by another List Administrator to view other lists, use the **All Lists** button.

Copying Lists

The Copy List feature allows you to combine lists. To use this feature:

1. Go to the *View My Lists* screen and click the pull-down menu for **List Name** to select the list you want to copy **from**.
2. Click on the **Copy List** button.

3. On the *Copy List* screen, click the pull-down menu for **Copy to List Name** to select the list you want to copy **to**.
   Note: Even though the lists have been combined, the list you copied from still exists, only the copy to list has changed.view other lists, use the **All Lists** button.

List Updates

If you have not set up the Email Notification feature, you can manually check for updates to the documents on your list.

1. Go to the *View My Lists* screen, click the **List Administration** tab, and then click the **List Updates** tab.
2. Highlight a list name in the **My Lists** panel and then highlight a **Date Range**.

3. The system will then **alert** you on the main search screen when any of the documents update from the list within your selected Date Range.

4. You can manually check for updates by going to *View My Lists* screen where updated documents will be listed in the **Updated by** column.

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