

# Administrator Options

## IHS Standards Expert™ Tool

### Tip Sheet



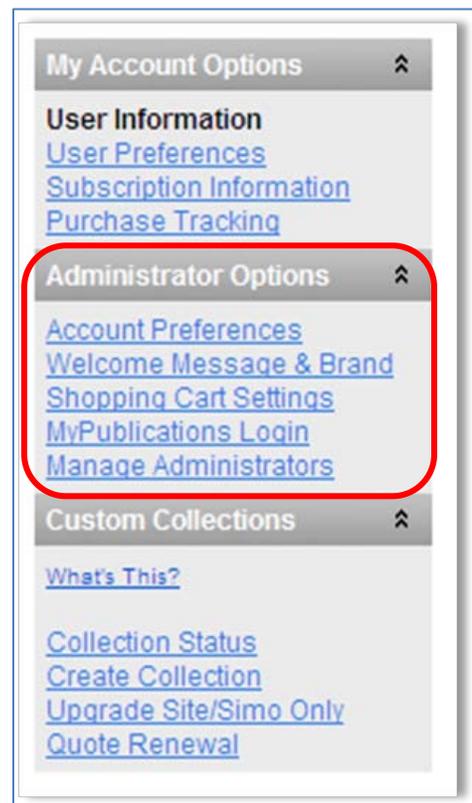
**The Source**  
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#### Administrator Options Overview

IHS continues to expand the Administrator Options available within IHS Standards Expert, allowing Account Administrators to further customize the user experience for individual users.

The Administrator Options can be found under the My Account tab, in the left navigation panel. These options allow Account Administrators to:

- Establish Account Preferences for IHS Standards Expert users
- Create a Welcome Message for users
- Brand IHS Standards Expert with a company logo
- Create custom Shopping Cart entry Fields and Messages
- Log in to My Publications to upload company document information
- Manage Administrators
- Log into the IHS Gatekeeper Administration System



### Account Preferences

Account Administrators can select Account Preferences from Administrator Options in order to set or modify user preferences, in the event that a user has not already established his or her own User Preferences. The Account Administrator can set preferences for Search, Results Display, and Tools for an individual user – an ideal approach when training new users, for example. Once users become more familiar with IHS Standards Expert, they can select their own User Preferences.

**Search Preferences**

The checked filters are the default filters that will be pre-checked before performing any search.

Most Recent Revision  
  Active Status  
  My Subscription

**Results Display Preferences**

Date format:       Results Per Page:

**Title Language Display Preferences**

If a standard has a title in different languages, the language highest in your preference order will be shown.

English; German; French; Spanish; Danish; Italian; Norwegian; Portuguese; Dutch; Finnish; Swedish; Arabic; Chinese; Polish; Russian; Turkish; Japanese; Vietnamese; Korean

[Change Language Order](#)

Only display document language indicator **L** for non-English documents.

Display DOD Adopted|ANSI Approved indicators

**Tools Preferences**

**Watch Lists**

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

**Your Recently Viewed Documents**

Number of documents to save:

### Welcome Message & Brand

It has never been easier for Administrators to communicate to their company's IHS Standards Expert user community. Accessing the Welcome Message & Brand option provides an HTML text editor that allows Administrators to author a message for their users. It is even possible to embed a URL in the message to reference an internal company document or a website.

In addition, Administrators can upload their companies' logo or a brand graphic, which will be shown in the upper left-hand corner of every page in IHS Standards Expert.

**Corporate Message**

This changes the block of text in the upper right section of the home page. This information will appear for every user in this account.

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**Welcome to IHS Standard Expert**

This is a custom message that can be changed by your companies internal **IHS Standards Expert** administrator to meet any messaging requirements your organization may have!

**Brand Graphic**

This changes the brand graphic, that is shown in the upper left of every page. The brand graphic can not be larger than 350 by 55 pixels.

Preview Brand Graphic:

Your Company Logo Here

### Shopping Cart Settings

Some Account Administrators may wish to capture additional information from IHS Standards Expert users that request document purchases, such as an Order Justification, a project number or business unit information (e.g., for chargeback purposes).

Administrators also may wish to communicate company purchasing policies to users who are employing the Shopping Cart feature to procure documents. For these purposes, IHS Standards Expert provides Administrators with customizable tools that include enabling a Justification Field, Custom Tracking Field and/or the Custom Shopping Cart Message.

An Administrator can apply these settings to an entire Account or choose to define them for one or more Sub Accounts.

**Shopping Cart Settings**

Select one of the following options:

- Set default for entire Account (1111112)
- Select Specific Sub Account(s)

Shopping Cart Settings allow Administrators to enable an Order Justification field, enable and name a Custom Data Field, and create a Custom Message within the Shopping Cart. *Please note that the Order Justification tool is only available when the Gatekeeper purchase controls are in use.*

Administrators may apply these settings to the entire Account or may choose to define them for one or more Sub-Accounts. Individual Sub-Account settings will take precedence over Account-level settings.

To apply settings to the entire Account, select "Set default for entire Account" above.

- Order Justification will not be available; this tool must be enabled at the Sub Account level.
- Completing and Submitting the form will automatically enable the tools. If you do not wish to enable one of the tools, leave the relevant field blank.
- If the tools have already been enabled, the existing values will be shown for editing.
- Use the "Reset" button to clear any existing values.
- Use the "Delete" button to clear the form and disable the tools.

To apply settings to specific Sub Accounts, select "Set Specific Sub Account(s)" above.

- Completing and Submitting the form will automatically enable the tools. If you do not wish to enable one of the tools, leave the relevant fields blank.
- If the tools have already been enabled for the selected Sub Account(s), the existing values will be shown for editing.
- Use the "Reset" button to clear any existing values.
- Use the "Delete" button to clear the form and disable the tools.

Choosing Select Specific Sub Account(s) provides the Administrator with all of the companies' Sub Accounts to select from.

Select Sub Account(s)

Available Sub Accounts:

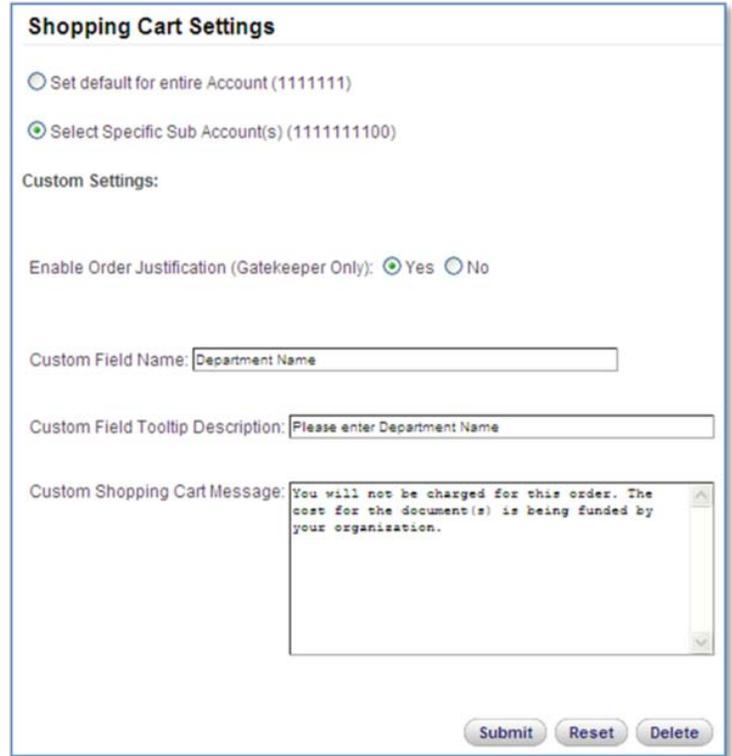
- 1111112001 - Access to all products
- 1111112002 - QDEC Admin Level 1
- 1111112003 - QDEC Admin Level 2
- 1111112004 - QDEC Admin Level 3
- 1111112011 - SAIC DEMO ACCOUNT
- 1111112017 - Test of PPV
- 1111112018 - Bernie's extract test account
- 1111112022 - Citation Test Default Account
- 1111112023 - Bernie Test Account for Cros
- 1111112024 - Test Account for Tom Nelson
- 1111112025 - IHS Canada Account for Testi
- 1111112026 - IHS Canada Account with PC
- 1111112028 - Germany Aviation PPV acces
- 1111112029 - test account to show doug
- 1111112030 - Test of Number of Users
- 1111112031 - IHS Germany partner account
- 1111112036 - IHS Canada Partner Account
- 1111112020 - IHS/COM/Marketing/Expert

Assigned Sub Accounts:

Buttons: Add All >>, Add >, Remove <, Remove All <<

Submit Cancel

The Administrator can then create an Order Justification field for Sub Accounts using the Gatekeeper tools. Or a Custom Tracking Field can be set up to capture specific data for all purchased documents, such as a Project Number or Business Unit. Or add a Custom Shopping Cart Message to communicate company purchasing policy to all users of the Shopping Cart.



**Shopping Cart Settings**

Set default for entire Account (11111111)

Select Specific Sub Account(s) (1111111100)

Custom Settings:

Enable Order Justification (Gatekeeper Only):  Yes  No

Custom Field Name:

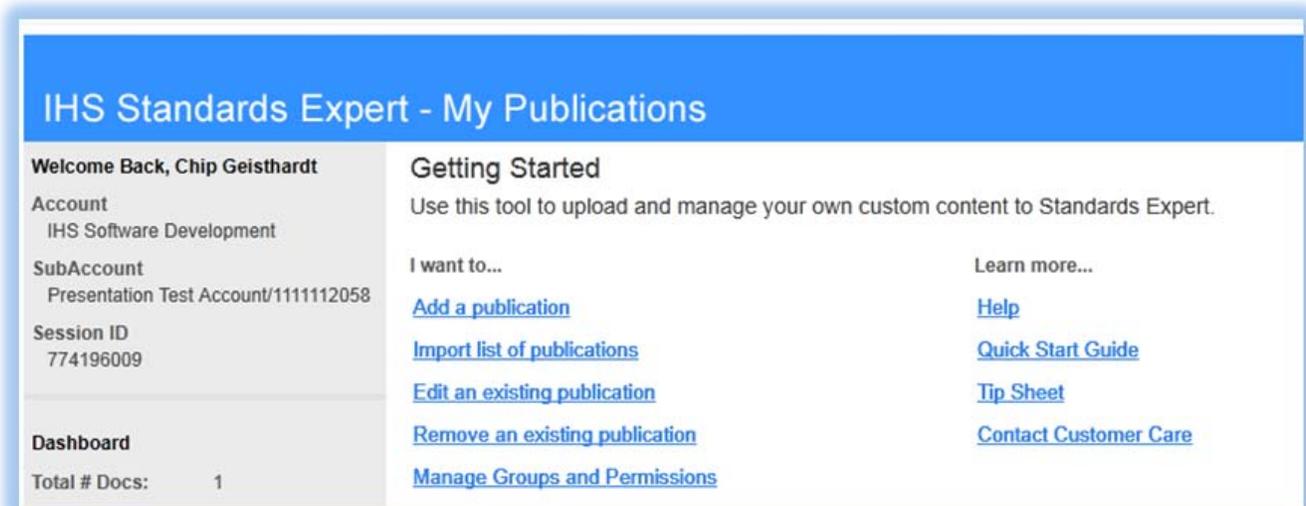
Custom Field Tooltip Description:

Custom Shopping Cart Message:

### My Publications

My Publications Administrators have the tools to upload their own companies' document information and full text links to IHS Standards Expert. The added records will be fully integrated into the Search Index within IHS

Standards Expert and will appear within Search Results, flagged as locally managed content. If a URL has been added, users will be able to view the document by clicking on the link.



**IHS Standards Expert - My Publications**

<b>Welcome Back, Chip Geisthardt</b> Account IHS Software Development SubAccount Presentation Test Account/1111112058 Session ID 774196009	<b>Getting Started</b> Use this tool to upload and manage your own custom content to Standards Expert.  I want to... <a href="#">Add a publication</a> <a href="#">Import list of publications</a> <a href="#">Edit an existing publication</a> <a href="#">Remove an existing publication</a> <a href="#">Manage Groups and Permissions</a>	Learn more... <a href="#">Help</a> <a href="#">Quick Start Guide</a> <a href="#">Tip Sheet</a> <a href="#">Contact Customer Care</a>
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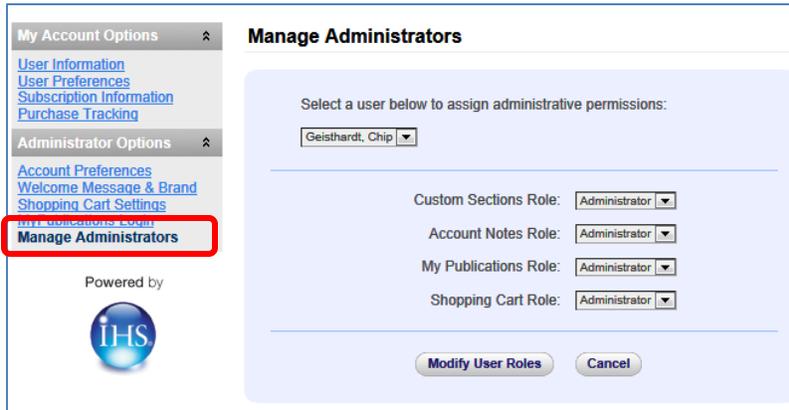
**Dashboard**  
Total # Docs: 1



### Managing Administrators

To assign Administrator privileges to registered users, select Manage Administrators from the Administrator Options menu. Upon selecting the appropriate user, the available Administrator options will appear below. Assign

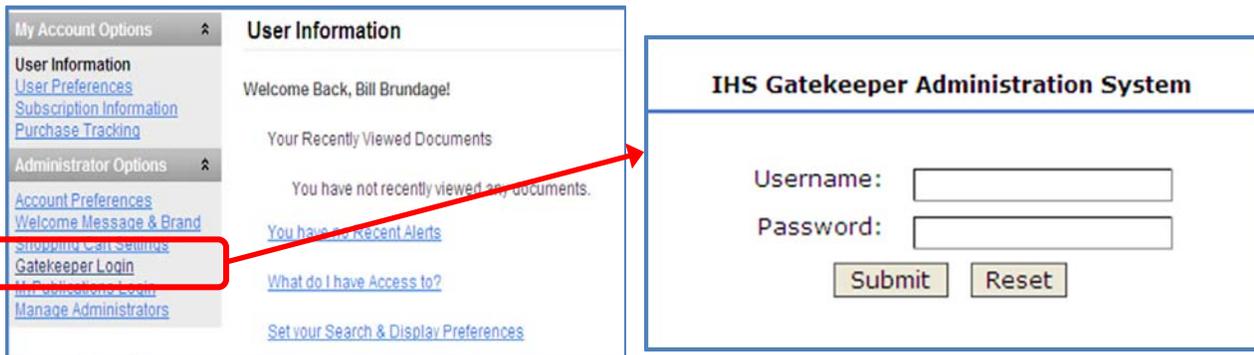
role(s) as desired, and click on Modify User Roles to save the settings. User roles can subsequently be modified as necessary, including reverting role(s) back to "User."



### Gatekeeper Login

Gatekeeper Administrators and/or Approvers will be able to link directly to the Gatekeeper login from IHS Standards Expert. Clicking on the Gatekeeper Login link

under the Administrator Options menu will bring up the login screen for the IHS Gatekeeper Administration System.



For more information on these and other innovations and capabilities in IHS Standards Expert, click on "Tech Tips & Quick Overviews" available from the home page, under IHS Standards Expert News.



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