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What is My Publications?

My Publications is an application within IHS Standards Expert (ISE) that allows customers to index their own publications in ISE while storing those publications on their own servers. When performing a search in ISE, returns include documents and links to all indexed documents.

My Publication Administrators at your company load and manage the index information for the publications and set permissions for users to access the publications.

Users view My Publications documents in their search results lists where the documents can be identified with a green indicator in the title line of the document. The View button links to the document with a URL provided by the Administrator at the time of uploading.

You must subscribe to My Publications in addition to ISE to include this feature in your repertoire of features and uses of ISE.

System Requirements

To run My Publications and achieve the best performance of downloading/displaying the application screens and PDF documents, IHS recommends that you have one of the following browsers and one of the following versions of Adobe Acrobat Reader installed on your computer. In addition, download the Save As Plug-in security feature for Digital Rights Management (DRM) and, if you subscribe to My Publications, download Silverlight.
Browsers

Internet Explorer - version 6.x, or 7.x
Firefox - version 3x

Adobe Acrobat Reader

Version 6, 7, 8, or 9

ISE Save As Plug-in

Some of the organizations listed in IHS Standards Expert now require a Digital Rights Management (DRM) security feature that protects the author’s intellectual property.

Documents that include this security are marked with a Lock icon. If there is no Lock, then your access is not affected.

Opening the Secure PDF files requires the one-time download of a free plug-in. Once it is downloaded, you will be able to access these secure documents without further action. The plug-in can be downloaded at http://plugin.fileopen.com/all.aspx.

If you have questions or need technical assistance please contact:

IHS Customer Support Center
Tel: 1-800-447-3352 (USA/Canada)
Tel: +1-303-397-2295 (Worldwide)
Fax: 1-303-397-2599
Email: supportcenter@ihs.com
Note: If you are an Extranet customer, please contact your System Administrator concerning the download and installation of the File Open DRM Plug-in.

My Publications Silverlight Download


If you attempt access to My Publications before downloading Silverlight, you will be prompted for the download before login.

My Publications is an additional subscription to ISE. You need to confirm that your company subscribes to My Publications.
Accessing My Publications

Access My Publications from the My Account tab. Click the **My Publications** link on the left.

If you are prompted to download Microsoft Silverlight, follow the prompts. A login box is displayed.
Enter your ERC User name and Password, and then click OK to gain access to the Home page.

If you need a reminder of your User name and Password, click the Remind Me link, enter your Email Address, and then click OK. Standards Expert will email the user name and password registered to your user account to you.

The Dashboard View of My Publications

The Home page of My Publications gives you a dashboard view that includes summary information about your accounts, published and unpublished documents, and links to the pages that allow you to manage publications. (You can also access these pages using the Add / Edit, Import List, and Administration tabs at the top of every page for My Publications.) Learn more by linking to the Online Help, Quick Start Guide, Tip Sheet, and Contact Customer Care information.
In addition, the dashboard provides a Publications Per Group graph that gives you an immediate visual overview of the number of publications indexed for each group in your subaccount.
Managing Publications

Administrators at customer sites manage publications indexed on My Publications by uploading, editing, and removing document information individually or in a batch process that imports lists of publications.

Adding, Editing, and Removing Documents

Administrators manage documents by adding new publications individually or with an import list, editing publications posted in the results list, and deleting publications.

⚠️ **Note:** Use caution when deleting a document as any associated Notes or links to a Watch List created by any users will also be removed.

You can add, edit, or remove publication on the Add / Edit tab and page. The documents that have been entered into My Publications are automatically displayed in the results list under the Search field. The first column contains an Edit button. The headings that follow across the table list the Document Number, Status, Publication Date, and Title / Abstract.

Note that you can turn the Abstract feature of the display on and off by selecting a radio button just above the right side of the table. By clicking the up or down arrow next to each heading, you can sort the list of documents in ascending or descending order.
The Export Results button allows you to export the results list as an XML structured Excel compatible file to your computer. When you click Export Results, a Save As dialog box is displayed.

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Search for a document on the list by entering search criteria in the field to the left of the Search button. Then click Search. You can enter part of a number or name.

You have the option of including the Abstract (summary description) of the document in the results list by clicking the On or Off radio buttons.

Export the search results list to your computer as an Excel compatible file.

Click the Add New Publication button to open the Add a New Document form.

To edit a document, click the Edit button to open the Edit Document Details form.

The Page indicator lets you know what page you are on and how many pages hold the list of published documents.
To add a new document

1. On the Add / Edit page, click Add New Publication.

The Add a New Document form is displayed. Note that Document Number and Title are required fields.

2. Enter the appropriate information in the fields.

3. To see a definition and description of the fields, click the Review Field Definitions link.
The Review Field Definitions table is displayed.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Number</td>
<td>You must enter a document number that contains alpha characters entered as upper or lower case and/or numeric characters. After the document information is saved to the database, you will be able to use the document number, as well as the short name or acronym you enter in the Organization field, as search criteria for the document when you perform a search.</td>
</tr>
<tr>
<td>Publication Date</td>
<td>Enter the date the document was published or last updated using “mm/dd/yyyy” as the format for the date. Note: When you import a list of Publications through the Import List tab or by using the Import List of Publications link, the format can vary as follows.</td>
</tr>
</tbody>
</table>

4. To view instructions about importing a list of publications, click the **Import List of Publications** link.

5. Click **Submit** on the Add a New Document form after you complete your entries in all of the fields.
To import a publications list

1. Click the **Import List** tab at the top of the page.

   The Import List of Publications opens displaying three steps.

   ![Import List of Publications](image)

2. Follow **Step 1** and Browse for the Excel or tab delimited file that contains the publication list information you want to upload.

   Depending upon your preference for an Excel or Tab delimited format, you can click either the Excel or Tab delimited links to use a template with the headings needed to match the data fields on the Add a New Document form.

3. When your data is displayed in the results list, follow **Step 2** and review any error message and red X indicators.
The error message and red X indicators alert you to errors in your data upload.

Note: You can copy and paste the contents of the Invalid Groups message to another file for easy reference as you make corrections.

4. Before making corrections to the documents marked with a red X, enter the missing group names into My Publications on the Administration page. (See Setting Permissions – To Add A Group below.)
5. Make corrections to your uploaded information by clicking the Edit button to open the Edit Document Details form where you can change the information in the fields, and then click Submit.
The Publish button on the Import List of Publications page is activated when all of the errors have been corrected.

6. Follow through with Step 3 and click Publish to submit your publication list to the Standards Expert Index.

To edit a document on the results list

1. From the Add / Edit or Import List pages, click the Edit button next to the Document Number.
Import List page

The Edit Document Details opens.

2. Enter your changes, and then click Submit.
To delete a document on the results list

1. From the Add / Edit or Import List pages, click the **Edit** button next to the Document Number.

2. When the Edit Document Details form opens, click **Delete**.

Your document, as well as any attached Notes or links to the Watch List, will be deleted from My Publications and Standards Expert.

To export the results list

1. On the Add / Edit page, click the Export Results button.
A Save As dialog box opens.

2. Enter a file name, and then navigate to the folder where you want to save the list.

3. Click Save.
To export or delete all publications

1. From the Administration tab/page, click the subtab Other.

   The page opens with two buttons for exporting or deleting all publications.

   ![Image of buttons]

   - Export All Publications: Exporting all of your Publications can take some time to download, please be patient.
   - Delete All Publications: Deleting all of your Publications will remove them from the Standards Expert Index. Any users that have access to these Publications will no longer be able to view them. Any Notes attached to these Publications will be lost and any document added to a Watch List will be removed from that Watch List.

2. To export all publications to your local drive, click the Export All Publications button.

   Note that exporting all of your Publications can take some time to download.

3. To delete all publications, click the Delete All Publications button.

   Note that any users who have access to these Publications will no longer be able to view them, any Notes attached to these Publications will be lost, and any document added to a Watch List will be removed from that Watch List.
Setting Permissions

Administrators grant access to documents by creating groups and assigning groups to subaccounts. A group is a collection of documents with a Group Code (name). A subaccount is a subordinate account with a particular license for an IHS product.

When an Administrator creates a group and then assigns the Group Code (by entering the Group Code into the Group Code field on the Add A New Document form – see the section Adding, Editing, and Removing Documents above), the Administrator adds a document to a collection. When the collection of documents (group) is associated with a subaccount, users associated with the subaccount have access to the collection to view documents in the group.

To add a group

1. From the Administration page, click the Groups tab, and then click the Add New Group button.
The Add New Group box opens.

![Add a New Group](image)

2. Enter a Name and Description.

   The Name should be short, and the Description is an extension of the name and can contain any valid information to help in describing the Group.

3. To make the group the default group, check the **Default** box.

4. Click **Submit** to create the group

   OR

   Click the **Cancel** link to stop the process.

Created groups are displayed in the results list. The default group is identified with “(Default)” to the right of the Group Name.
To edit a group

1. Click the **Edit** button next to the group you want to change.

   The Edit Group Box is displayed.

   ![Edit Group](image)

2. Change the Name and/or the Description.

3. Check or uncheck the Default checkbox.

   Selecting this option removes the default indicator from any other Group and assigns this Group as the Default.

4. Click **Submit** to save the changes.

   **OR**

   Click the **Cancel** link to stop the process.
To remove a group

1. Click the **Remove** button.

   The Delete Group box is displayed.

   ![Delete Group](image)

   When deleting a group you must use caution when deciding what will happen to any document(s) that are associated to that Group. Your options are:

   - **Delete**: Delete Group and all documents in the Group
   - **Move**: Move documents to Default Group and Delete Group
   - **Cancel**: Do not Delete the Group. Return to Groups tab

2. Select **Delete**, **Move**, or **Cancel**.

   Be careful when deleting and moving groups and consider the use and associations for each document in the group before taking action.

   Selecting **Delete** provides a confirmation message that states: "Please confirm the deletion of # of document(s) and the selected Group from the database." Clicking **OK** deletes the document(s) and the selected Group. You will then be returned to the Groups tab.

   Selecting **Move** provides a confirmation message that states: "Please confirm moving # document(s) to the default Group and the deletion of the selected Group." Clicking **OK** moves the document(s) to the Default Group and deletes the selected Group. You will then be returned to the
Group tab.

Selecting Cancel stops the process and returns you to the Groups tab.

To assign a group to a subaccount

1. From the Administration page, click the Group Permissions tab.

The page opens with a Select a Group drop-down field, an Available SubAccounts pane, and an Assigned SubAccounts pane.
2. Select a group from the drop-down list.

3. Select an Available SubAccount in the left pane.

4. To move the selected subaccount to the Assigned Subaccount pane on the right, click the Add button in the center.
If you want to move all the subaccounts to the Assigned SubAccount pane, click **Add All**.

The selected and moved subaccount is now assigned to Default 111111001.

To remove a subaccount from **Assigned SubAccounts**

1. Highlight the subaccount.
2. Click **Remove**.
3. To remove all of the subaccounts from the Assigned SubAccounts pane to the Available SubAccounts pane, click **Remove All**.