

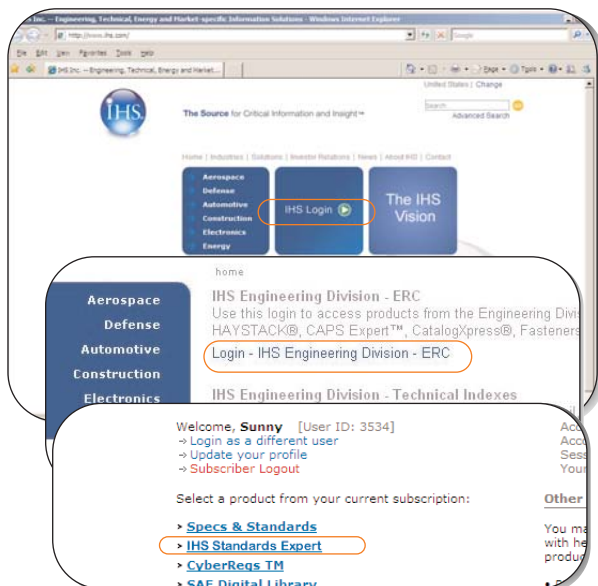
IHS Standards Expert

QuickStart Tip Sheet - The Basics



To start IHS Standards Expert:

1. Go to <http://www.ihs.com> and click on IHS Login.
2. On the Login Menu, select **Login - IHS Engineering Division - ERC**.
3. On the Login page, enter your company's account Username and Password (not your unique username and password).
4. On the ERC menu, select **IHS Standards Expert**.

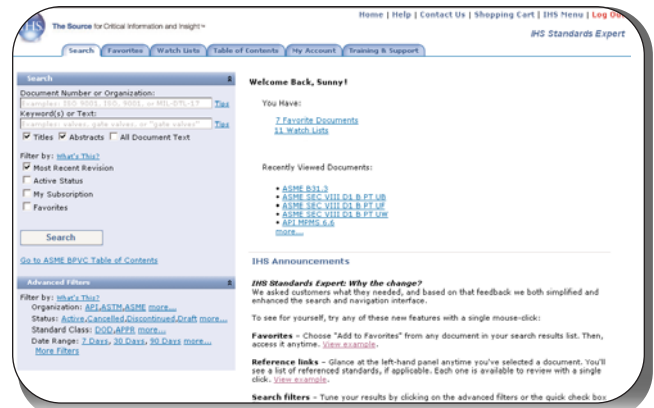


Search Tab

The Search tab of the IHS Standards Expert application provides the fields and filters required to perform a basic and advanced search.

The personal profile section of the screen provides quick links to your Favorites list, Watch Lists, and any Recently Viewed Documents.

The **IHS Announcements** section communicates the latest application or content information to IHS Standards Expert end-users.



IHS Standards Expert Tabs Overview

The IHS Standards Expert application is developed in a tabbed format to provide quick access to the major features and functions that make IHS Standards Expert a valuable standards management tool.



Tabs Overview:

- **Search** - The Search tab is the main search page that displays when you first log into the application. It provides the fields and filters required to perform a basic and advanced search. It is also the tab that displays the search results.
- **Favorites** - The Favorites tab contains a single list of documents that you can quickly access. Documents can be added to your Favorites list from search results, the Document Details tab, when viewing the actual document, the Document History list, and a Table of Contents section.
- **Watch Lists** - The Watch Lists tab allows you to set up personal and shared document lists, which provide a method for you and/or your project team to quickly retrieve frequently needed documents. Watch Lists can help you stay on top of regulatory and contract compliance issues.
- **Table of Contents** - If you subscribe to the American Society of Mechanical Engineers (ASME) Boiler and Pressure Vessel Code (BPVC), Engineering Sciences Data Unit (ESDU), or Minerals Management Service (MMS), the Table of Contents tab provides an expandable folder structure that allows you to navigate through these collections.
- **My Account** - The My Account tab provides information about your account, user preferences, and subscription information. The options include: **User Information** (personal profile information and account information), **User Preferences** (Date and Result Count Display, Recently Viewed Documents, Title Language Display, Document Language Display, Search Filter options, DOD/ANSI Display), **Subscription Information**, and **Purchase Tracking** information.

IHS Standards Expert Tabs Overview (continued)

- **Training & Support** - The Training & Support tab provides information and links to IHS tools that enhance the IHS Standards Expert product. It includes the following sections: Help, Tips, What's New, Related Links, Contact Us, Training/Demos, and FAQs.

Additional Menu Options

The top navigation options provide additional links to the IHS Standards Expert application and other Engineering Resource Center (ERC) options.

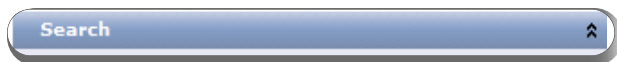
The image shows a screenshot of the top navigation bar with the following links: "Home", "Help", "Contact Us", "Shopping Cart", "IHS Menu", and "Log Out". The "Log Out" link is highlighted in red.

The top navigation options are:

- **Home** - Click the **Home** link to return to the main Search tab when you are on other IHS Standards Expert screens.
- **Help** - Click the **Help** button to launch the Online Help in a secondary window. The Online Help provides you with detailed information on the features and functions of IHS Standards Expert.
- **Contact Us** - Click the **Contact Us** button to open a secondary window with contact phone numbers and link to an email form that can be sent to the IHS Engineering Customer Support Center with your questions or feedback.
- **Shopping Cart** - Click this link to view documents that you have purchased or placed in your shopping cart.
- **IHS Menu** - When you click on this button, you are returned to the ERC Main Menu, which allows you to select other IHS products to which you subscribe, change your profile information, log in as a different user, or log off of the ERC system.
- **Logout** - This option logs you out of IHS Standards Expert and out of the ERC system.

Basic Search Filters

A Basic search is done by entering criteria in the **Document Number** or **Keyword** field, and including (or excluding) other basic search filters to refine your results. Any combination of filters can be used. Basic search filters are found under the **Search** tool bar. The double arrows allow you to expand or collapse the filter options.



Basic search criteria includes:

- **Document Number or Organization** - You can enter document numbers that contain alpha and/or numeric characters, such as MIL DTL 17. Alpha characters can be entered as either upper or lower case. You can also include an organization acronym in your document number search, such as ASME B31.3
- **Keywords** - Enter a keyword or a string of text, such as *steel gate valve* to search all document Titles and Abstracts. The Titles and Abstracts check boxes are selected by default.
- **Titles** - When selected, this searches the titles of every document in the IHS Standards Expert database for the keyword(s) you entered.
- **Abstracts** - When selected, the application searches the text of abstracts for the keyword(s) you entered.
- **All Document Text** - When selected, a search is performed on the entire content of all PDF documents for the keyword(s) you entered.
- **Active Status** - By selecting the Active Status filter, search results are limited to only those documents that the authoring organization has labeled as Active.
- **My Subscription** - By selecting the My Subscription filter, search results are limited to only those documents to which you subscribe.
- **Most Recent Revision** - Most Recent Revision documents are the most current version of that document as issued by the authoring organization. In some cases, the most current version of a document is cancelled, inactive, or withdrawn.
- **Favorites** - By selecting the Favorites filter, search results are limited to only those documents on your Favorites list.
- **Go to ASME BPVC Table of Contents** - This links to the Table of Contents tab that has expandable folders and pages for ASME BPVC, ESDU, and MMS publications.

Advanced Search Filters

The Advanced Search filters provide further refinements to your search criteria. Any combination of filters can be used in addition to the document number or keywords you enter. Some filters may not apply to the document for which you are searching, such as ICS or FSC codes.

The **What's This** link is a simple pop-up with a brief description of the Advanced Search filters.

If you click on the **more...** link for these filters, a secondary window displays with a list of items relevant to the filter. You can select one item or multiple items. The Advanced Search filters include:

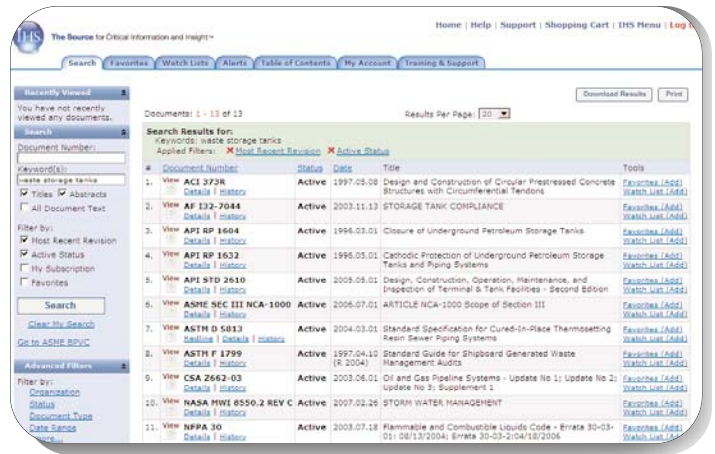
- **Organization** - This filter restricts the search to the selected authoring organizations.
- **Status** - This filter allows you to select status types other than Active. These status conditions are assigned by the authoring organizations to indicate the status of a document.
- **Standard Class** - This filter includes military and federal documents and/or documents from a specific industry. Standard Class documents are associated with the organization type that authored or adopted/ approved the document.
- **Date Range** - A date range filter allows you to limit your search criteria to a specific date range for the posting of a document or by the authoring organization's publication date.
- **ICS Code** - The International Classification System (ICS) for standards is a broad subject classification structure for international, regional, and national standards. The system was created by the International Organization for Standardization.
- **FSC Code** - The Federal Supply Classification (FSC) is a four-digit code assigned to all U.S. Government standardization documents. Items that are similar in physical or performance characteristics are requisitioned together or grouped together for supply management purposes.
- **IHS Segment** - The documents in the IHS Standards Expert application have been categorized into segments to refine the organization of the documents. In some instances, the segment and organization may be the same.

Search Results

After you initiate a search, the results are displayed in a table format with your search criteria at the top of the list. The number of documents retrieved is displayed in the upper left corner of the table.

Any time you add new search parameters with a search filter or refined document number or keyword, the counts are adjusted accordingly. If you want to remove a search filter, click on the red X for that filter.

In addition, you can sort results by clicking on the Document Number, Status, or Date column heading.



The following information is available from the results list:

- **View** - Click on the **View** icon to go to the **View Documents** tab where an IHS Terms & Conditions notice displays. To view the document, click **Accept** and a PDF image of the document opens with Adobe Acrobat Reader. From here, you can access Recently Viewed Documents, other documents within the Revision Group (if applicable) or standards that are referenced within the document you are viewing. Click the **Document Details** tab to view summary information about the document.
- **Details** - Click on this link to go to the **Document Details** tab to view a **Document Summary**, an **Abstract** (if available), and **History** information about the document.
- **History** - Click on this link to go directly to the document's history information section on the **Document Details** tab.
- **Favorites (Add)** - Click this link if you want to add the document to your Favorites list.

- **Watch Lists (Add)** - Click this link if you want to add the document to a Watch List you have already created.
- **Download Results** - Once you have performed a search, you have the option to download and save the results as a .csv spreadsheet file. The number of downloadable results is limited to one thousand (1000) records.
- **Recently Viewed** - When you View a document, it places it under the **Recently Viewed** list that appears on the home page in the personal profile section and within the left-hand navigation panel on other screens throughout the application. These are active links that allow you to quickly access documents you have already opened and viewed. The default (and maximum) saves ten documents, but this can be modified under **User Preferences** on the **My Account** tab. As you view more documents, they replace the previously viewed 10 documents



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