

IHS Standards Expert™

Watch Lists Tip Sheet - How to Manage Your Documents



The Source
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The Watch Lists feature of IHS Standards Expert allows you to set up personal and shared document lists, which provide a method for you and your team to quickly retrieve frequently needed documents. You can also set up Alerts and receive email notifications when any updates or revisions occur to the documents. An Alerts tab is available to instantly view documents on your Watch Lists (or your Favorites) that have updated in the last week, 30 days, 60 days or 90 days. The Alerts feature helps you verify that the documents you are using are current and ensures that you are continually compliant.

Registration

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

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 the registration form. For more information, please read the IHS Privacy Policy.

1. Go to <http://www.ihs.com> and click **IHS Login**.
2. Select **Login - IHS Engineering Division - ERC** link.
3. Enter your account username and password, and click **Submit**.
Note: Some companies have implemented a blind login procedure that allows you to bypass the Account Login screen.
4. Select the **IHS Standards Expert** link on the **Main Menu** screen to access the product.

Not Registered?

If you have not registered, the following link is displayed in the personal profile section of the Search tab:

Register on IHS Standards Expert to make your searches easier.

1. Click on the link to initiate the Registration process.

Registration (continued)

2. On the Registration screen, enter your information (all fields are required), and then click **Submit**.

3. 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 then enter the username and password you used with your initial registration. It is not necessary to re-enter all of your profile information.

Creating a Watch List

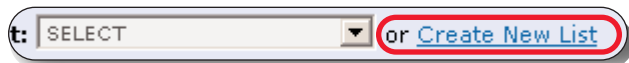
When you click on the Watch Lists tab for the very first time, a message displays stating that you have not created any lists. Once you create a list, it is added to a drop-down menu that includes all of your company's public lists. Creating a new list can be done by using the **Quick List Creation page** or by following the step-by-step **Create List Wizard**.



Quick List Creation Page

The **Quick List Creation page** allows you to set Watch List options in one, quick view. To create a new list:

1. Go to the Watch Lists tab, and then click on the **Create New List** link.



2. Click on the **Quick List Creation page** link.



Quick List Creation page (continued)

3. In the **New List Name** section of the page, enter a name for your list, such as Project XYZ.

4. The **List Sharing** section of the page allows you to set modification/editing and viewing rights for your lists.

For **List Sharing > List Modification**, the modification rights default is set to **Only selected users**. This option gives list editing rights to those users you select and allows those users to add, delete, or update documents on the list. By default, you are given permission to modify your list.

- a) To grant modification rights to other users, click on the **Choose Users** link.
- b) Click on the check box next to registered individuals within your company to whom you want to grant modification rights, and then click the **OK** button.

For **List Sharing > List Viewing**, the rights default is set to **All registered users**, allowing all users registered under your company account to view the list.

- a) To allow selected users to view the list, change the List Viewing setting to **Only selected users**, and then click on the **Choose Users** link.
- b) Click the check box next to registered individuals within your company that will be allowed to view the list, and then click the **OK** button.

Quick List Creation page (continued)

5. The **List Alert Settings** section of the page allows you to set up users to receive email alerts whenever documents on your list are revised. By default, only your email address is set up to receive email alerts.
 - a) To edit an existing email address or add a new email address, click the **Edit/Add Email Addresses** link.
 - b) Enter the email address for the individual that will receive email alerts, and then click **Add**.
 - c) Click the **Remove** link to delete an email address.
 - d) When you have finished editing or adding email addresses for List Alerts, click **OK**.
6. If you are satisfied with the List Name, List Sharing, and List Alert settings, click the **Create** button. Once your list is created, you can perform a search and add documents to your list.

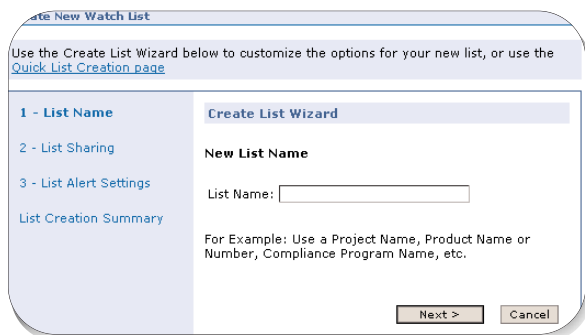
Create List Wizard

Creating a new list can also be done using the **Create List Wizard**. The Create List Wizard provides a step-by-step process to customize the options for your new list.

To create a new list with the Create List Wizard, go to the Watch Lists tab and click on the **Create New List** link.

Step 1 - List Name

In the **Create List Wizard** box, enter a name for your list, such as Project XYZ, and then click **Next**.

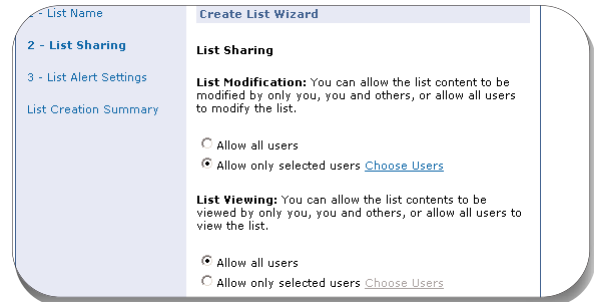


Step 2 - List Sharing

1. For **List Sharing**, the **List Modification** (editing) rights are set to **Allow only selected users**. This default option gives list editing rights only to those users you select, allowing those users to add, delete, or update documents on the list. Or, you can select the **Allow all users** option to grant list modification/editing rights to all users within your company.

Create List Wizard (continued)

2. When the **Allow only selected users** option is selected, you are given permission to modify your list by default. If you need to grant modification rights to other users, or change the list of users that can modify your list, click on the **Choose Users** link.



3. The **Selected Users** option is checked by default, which means only the users *you* select will have modification rights. If you select **All Users**, all users within your company will have modification rights. Click on the check box next to registered individuals within your company to whom you want to grant modification rights, and then click **OK**.



4. Once you have selected the List Modification users, you can set **List Viewing** rights. By default, List Viewing rights are set to **Allow all users** - allowing all users registered under your company account to view the list. To allow only selected users to view the list, change the List Viewing setting to **Allow only selected users**, and then click on the **Choose Users** link.
5. Click the check box next to registered individuals within your company that will be allowed to view the list. Click the **OK** button.
6. With List Modification and List Viewing permissions set, click **Next** to continue to Step 3.

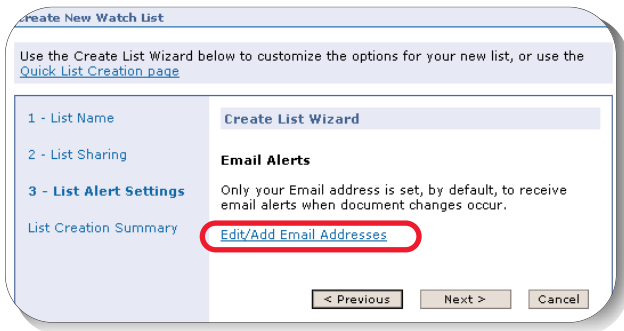
Step 3 - List Alert Settings

List Alert Settings allows users to receive email alerts on documents modified by the authoring organization, which are updated in the IHS Standards Expert database. You can select those individuals on your team, for example, that need to receive email alerts for documents that change.

Step 3 - List Alert Settings

As the creator of a list, your email is automatically selected. To add other email alert recipients:

1. Click on the **Edit/Add Email Addresses** link.
Note: Use this link if you want to change your own email address.



2. Enter the email addresses for the individuals who should receive alerts, and then click **Add**. When you have finished, click **OK**, and then click **Next**.

Step 4 - List Creation Summary

A **List Creation Summary** page displays the options you have set for the list.

1. If you would like to make changes to any of the options, click the **Previous** button until you are on the option screen where you would like to make the changes. Click the **Next** button until you are returned to the **List Creation Summary** screen.
2. If you are satisfied with the summary, click **Finish**.
3. Once your list is created, you can perform a search and add the documents you want to your list.

Note: If you do not want to receive email alerts for a list you previously created:

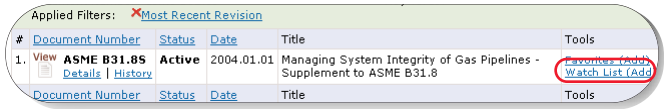
- a) Click on the **List Modification** link in the left navigation panel to open your list.
- b) Click the **Alerts** check box to deselect the option.
- c) Click the **Update Selected** button.

Adding Documents to a List

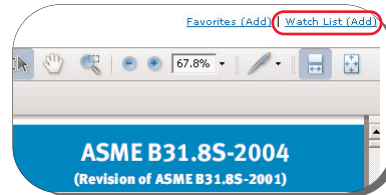
To add a document to a Watch List, click on the **Search** tab and search for the documents you want to add to the list.

Example:

1. Enter **Asme B31.8S** in the **Document Number or Organization** field, and then click **Search**.



2. On the results list, click the **Watch List (Add)** link. You can also add a document to a Watch List while viewing a document.



3. Select your list from the drop-down menu.



Select the **Yes** option for **Most Recent** to place the Most Recent revision of the document on your list, which could be an addenda to a document, i.e., Addenda A, and not necessarily a complete replacement for the existing document.

When the Most Recent option is set to **No**, the specific version of the document you have selected is placed on your list. If the document updates, your list remains at the specific version selected until you elect to update your list.

The Document alert option is used to set an email alert for the document.

Once you have selected your list and settings, click the **Submit** button. Click the **Close** button to return to the results list.



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