IHS Standards Expert
Collection Add-On Tool

Customer Tools to Add Documents to Licensed Collections

Collection Administrator Training
Collection Add-On
Account Requirements / Validation

• An Account must have at least one licensed IHS Custom Collection or IHS Custom Block that is licensed to the account, not just the subaccount the user is accessing.
  • The renewal date of the Custom Collection cannot be within 30-days of the renewal date
  • The Quoted Pro-Rate price must be less than $50,000

• An IHS Sales Representative will assign an Administrator to the role of “Custom Collection Administrator”
  • The Custom Collection Administrator must have approval from the POLA/SLA approver/signer to procure documents that will be added to a licensed Custom Collections, and accept the Custom Collection Add-On Terms and Conditions.
“One – Click” Option
A Collection Add-On Administrator may add a document by clicking on the Shopping Cart icon and clicking on the Add to Collection link.

Collections may be “added-to” within 30 days as opposed to 90 days!
After a Collection Add-On Administrator has selected the appropriate IHS Custom Collection or IHS Custom Block PCN to add the document to, they must **Select Document Version**… “Yes” adds the Most Recent version, “No” adds the specific document.
Administrators can now add documents to their licensed IHS Custom Block Collections.

Available IHS Custom Blocks are identified, and the amount of available documents that may be added are indicated.

- IHS Custom Blocks do not go through the Pricing Process
- IHS Custom Blocks do not require the Administrator to accept Terms & Conditions
- Documents added to an IHS Custom Block are usually licensed and viewable within 1 hour
- Only documents defined to be included in an IHS Custom Block will be added
A Collection Administrator may add a document to an existing IHS Custom Collection or IHS Custom Block by clicking on the Shopping Cart icon and clicking on the Add to Collection link or by creating a new Watch List and selecting documents to add. After creating a Watch List, select the Watch List from the Watch List tab and then click on the Add to Collection button.
Collection Add-On
Selecting a Licensed Custom Collection

The Custom Collection Administrator is provided a list of Available IHS Custom Collections and IHS Custom Blocks which are licensed to a subaccount within their account. Note that some IHS Custom Collections or IHS Custom Blocks may not be available to add documents to.
IHS Collection Add-On
Viewing the contents of a IHS Custom Collection or IHS Custom Block

Clicking on View Collection displays a list of documents that are included in the IHS Custom Collection or IHS Custom Block. This feature ensures documents are added to the correct collection.
Collection Add-On
Submitting the Quote for Pricing

After selecting the **Collection** to add documents to, click on the **PCN** number (CCxxx) and a window will ask you to **Select Document Version**. Clicking on the **OK** button and launches a window displaying the details of the **Collection** and when it was originally licensed. If any of the information is incorrect, click on the **Contact IHS** link to contact an IHS Representative. The ability to add a **Collection Note** or **Quote Description**, update the **Phone Number** or update the **Number of Employees** is provided for the Collection Administrator. Some Standards Developing Organizations (SDOs) require the **Number of Employees**, and if the original quote did not contain this information, update it here. Click the **Submit for Pricing** button to start the process of adding documents to your **Collection**.
Collection Add-On
Collection Exceptions

- This page will be displayed if there are **Custom Collection Exceptions** included in the quote. IHS has contracts with many SDOs and some have rules that govern how documents may or may not be included in a **Collection**.
  - Some SDOs do not allow documents to be included in a **Custom Collection**.
  - Some SDOs require a minimum number of documents for a **Custom Collection**.
  - Some SDOs exclude document types that may be included in a **Custom Collection**.

- Exceptions are identified when the request is submitted for pricing and are presented on the **Custom Collection Exceptions** page.

- To continue the Quote process, click on the **Continue** button.
  - By clicking on the **Continue** button, the pricing process will remove the exceptions from the quote and a window will display confirming continuation of the process.

- To remove the documents with exceptions, click on the **Back to Watch List** button, remove the documents and resubmit the quote. See next slide for more information.

Note: When an Administrator uses the One-Click method (Shopping Cart - Add to Collection) to add a document, the exception will be displayed but the **Back to Watch List** option is not applicable. The process will stop if we do not have rights from the SDO to add documents to a Collection. If a Draft document was selected, it will default to the Active document if one is available.
Collection Add-On
Custom Collection Exceptions; Returning to the Watch List

Returning to the Watch List allows:
- Deleting the Exception Documents
- Deleting documents to not include
- Adding more documents

Click on the Add to Collection button and repeat the steps to ensure the deleted and/or added documents are included.

Note: When an Administrator uses the One-Click method (Shopping Cart - Add to Collection) to add a document, the exception will be displayed but the Back to Watch List option is not applicable. The process will stop if IHS does not have rights from the SDO to add documents to a Collection. If a Draft document was selected, it will default to the Active document if one is available.
Collection Add-On
The Quote is being processed…

After a Collection Administrator elects to submit the quote for pricing, (from either the Additional Details About Your Quote screen or the Custom Collection Exception screen) the pricing process will continue and the Submitted Quote Details are presented. The Quote ID number is included, and can be used in the event an IHS Sales Representative needs to be contacted.

- The Quote ID number is included, and can be used in the event an IHS Sales Representative needs to be contacted.
- The Collection Administrator may check on the status of the Custom Collection Add-On quote by clicking on the Collection Status link.
- An email will be sent to the Collection Administrator as to whether the quote is Priced or is in a Pending Price state.
  - There are two primary reasons for a quote being in a Pending Price state:
    - Documents requested to be added on to the Custom Collection may require approval from an SDO.
    - Documents have not been automatically priced and require review by the IHS Pricing Team.
- The request is reviewed by the IHS Pricing Team and an email is sent, to the Custom Collection Administrator, once the price is available or if there are any issues concerning the request.
- An email is also forwarded to the account’s IHS Sales Representative to inform them that an add-on request is being processed.
- A IHS Sales Representative may be contacted by clicking on the Contact IHS link.
Collection Add-On
Using “Contact IHS”

The **Contact IHS** link provides a Collection Administrator the opportunity to ask questions or provide comments applicable to the Collection Add-On process or questions / comments on other IHS Standards Expert features or functions. Click on the **Submit** button to forward the email directly to an IHS Sales Representative.
Collection Add-On
Custom Collection Status

The **Collection Status** link, available from the **Submitted Quote Details** page, presents a list of the account’s requests. The most recent quote is listed at the top and if needed, there are search filters to the left of the display where specific quotes by Number or by Status may be searched. Below are all of the possible scenarios by status.

- **Priced**: The quote has been priced and is waiting on acceptance.
- **PendingSDOApproval**: The quote has documents from SDOs that require approval (See Organization list in Quote) and the IHS Pricing Team is reviewing.
- **PendingPrice**: Quote has a pricing issue that the IHS Pricing Team is reviewing.
- **Licensed**: The request has been **Licensed** and the documents listed on the Quote are available for viewing.
- **ExpiredPrice**: If after seven days a **Priced** quote has not been accepted it will automatically be updated to this status.
Clicking on the **Quote ID** number provides details for that quote.
Clicking on the **PCN** number will access the documents currently licensed to the Custom Collection PCN.
Collection Add-On
Custom Collection Status: Priced

Clicking on the **Priced** Status will provide details for that quote with available “Options”

Accept Price
Document List
Re-Quote the Collection
Collection Add-On
Details for a “Pending Price” Quote

The following is a sample of a Quote in a Pending Price State. Reasons for a Pending Price state are that some SDOs require approval or there may be documents that require updating before a price can be provided. Action is being taken by the IHS Pricing Team to ensure the quote is priced as quickly as possible.

Under the **Org Totals** the statement **SDO Approval Required** may be displayed indicating that approval from an SDO is required prior to getting a price for the quote.

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<table>
<thead>
<tr>
<th>Quote ID: 91141</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pro-Rated Price:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Last Updated Date: 4/21/2013</th>
<th>Request Type: Addon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annualized Price:</td>
<td>Status: PendingPrice</td>
</tr>
<tr>
<td>Pro-Rated Price:</td>
<td>PCN: CC06U</td>
</tr>
<tr>
<td>User: Bill Brundage</td>
<td>Account Number: 1111111001</td>
</tr>
<tr>
<td>Number of Documents included: (35)</td>
<td>Number of Documents excluded: (4)</td>
</tr>
</tbody>
</table>

| Sites: 6 |
| Simultaneous Users: 5 |
| Countries: UNITED STATES |

Org Totals:
- ANSI - 6
- IEC - 21
- SAE - 2 (SDO Approval Required)
Collection Add-On

“Pending Price” Email

The Collection Administrator will receive an email if the request requires additional action by the IHS Pricing Team.

From: custompricing@ihs.com
To: "Your Name" <yourname@mycompany.com>
Subject: Your Quote is currently in a Pending Price state (Quote ID: 91087, Co Name: Michelle Test Co.)

Your request for an Add-on to a Custom Collection is currently in a Pending Price state. Reasons for a Pending Price state are that some SDOs require approval or there may be documents that require updating before a price can be provided. Action is being taken by the IHS Pricing team to ensure your quote is priced as quickly as possible.

Quote ID: 91087
PCN: CC061

To review the status of this Quote login to IHS Standards Expert, click on the My Account Tab, and then click on the "Collection Status" link. From the Status Page you will be able to search for this quote using the Quote ID identified above. You can click on the Quote ID number to see detailed information concerning your request. Contact IHS Customer Care at http://www.ihs.com/customercare if you have any questions on how to access this quote from IHS Standards Expert.
From: custompricing@ihs.com       Date: April 17, 2013 8:38:59 AM MDT
To: "Your Name" <yourname@mycompany.com>
Subject: Your quote, from IHS, has been priced (Quote ID: 91088, Collection No. CC06U)

At your request, the following IHS Custom Collection has been priced and is ready for your review:

Quote ID: 91088
Collection No: CC06U

To review your quote login to IHS Standards Expert, click on the My Account Tab, and then click on the "Collection Status" link. You will be able to locate your quote using the Quote ID identified above.

Contact IHS Customer Care at http://www.ihs.com/customercare if you have any questions on how to access this quote from within IHS Standards Expert.
To review the quote, login to IHS Standards Expert, click on the **My Account** tab and click on the **Collection Status** link. The Quote ID is included in the Price Quote email.

To continue the process, review the information on the **Custom Collection Priced** screen. This details the process for both the **Accept Price** or **Re-Quote Collection**.

Click on the **Document List** button to get a PDF list of the documents that are included in, and/or, excluded from the quote.

The **Pro-Rated Price** shown pertains to the documents listed under the **Number of Documents Included** tab.
Collection Add-On
Priced Quote Details

The **Annualized Price** is the 12-month price for the additional documents added. This may be the additional Custom collection cost to expect at renewal time due to the added documents. **The Pro-Rated Price** is based on the remaining days between now and the Custom Collection Renewal Date. This is the price that will be charged for access to the added documents. Both prices pertain to the documents listed under the **Number of Documents Included** tab.

Note: The Pro-Rated price is based on the days remaining on your Custom Collections annualized price and includes the LFAS fee.

<table>
<thead>
<tr>
<th>Quote Details</th>
<th>Number of Documents included (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Updated Date: 4/22/2013</td>
<td>Request Type: Addon</td>
</tr>
<tr>
<td>Renewal Date: 7/30/2013</td>
<td></td>
</tr>
<tr>
<td><strong>Annualized Price</strong>: $55.00</td>
<td>Status: Priced</td>
</tr>
<tr>
<td><strong>Pro-Rated Price</strong>: $16.00</td>
<td>PCN: CC003</td>
</tr>
<tr>
<td>User: Bill Brundage</td>
<td>Account Number: 1111111001</td>
</tr>
<tr>
<td>Potential Users: 1</td>
<td>Sites: 1</td>
</tr>
<tr>
<td>List Name: CC-Addon-4</td>
<td>Simultaneous Users: 1</td>
</tr>
<tr>
<td>Org Totals: FSS - 1</td>
<td>Countries: UNITED STATES</td>
</tr>
</tbody>
</table>
Collection Add-On
Terms and Conditions/Service License Agreement

When the **Accept Price** button is clicked on from the **Custom Collection Priced** screen, the Terms and Conditions / Service License Agreement will be presented. Accepting the Terms and Conditions / Service License Agreement is required to license the documents included in the Add-on Quote.

Once the **Accept Terms & Conditions** button is clicked, the Payment Method screen will be displayed. Clicking on the **Cancel** button displays the **Custom Collection Priced** screen.
Collection Add-On
Accept Payment Method

After accepting the Terms and Conditions the **Accept Payment Method** screen will be displayed.

The default option is to be **Invoiced**. (This is the only “default” option currently available). However, an optional payment method may be specified in the **Optional Payment Method** box. If an optional method is specified, an IHS Sales Rep will follow-up to obtain information for the specified payment option.

Clicking on the **Continue Purchase** button will automatically license the quote and the documents will be made available for viewing.

Clicking on the **Cancel** button returns to the **Custom Collection Priced** screen.
A Custom Collection Administrator may wish to review Licensed quotes. They may access this from the Custom Collection Status page. The document is now available to view!
Custom Collection Add-On

Questions?

Please contact your IHS Sales Representative or IHS Customer Care if you have any questions regarding the Custom Collection Add-On process.