Adding Documents to a Custom Collection or Custom Block

User Guide for Engineering Workbench

Updated June 20, 2017

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Objectives of this Presentation

- Learn how to add documents to an existing licensed Custom Collection or Custom Block following these steps:
  - >Add documents to a Watch List
  - >Submit the documents for pricing
  - >Accept your price quote

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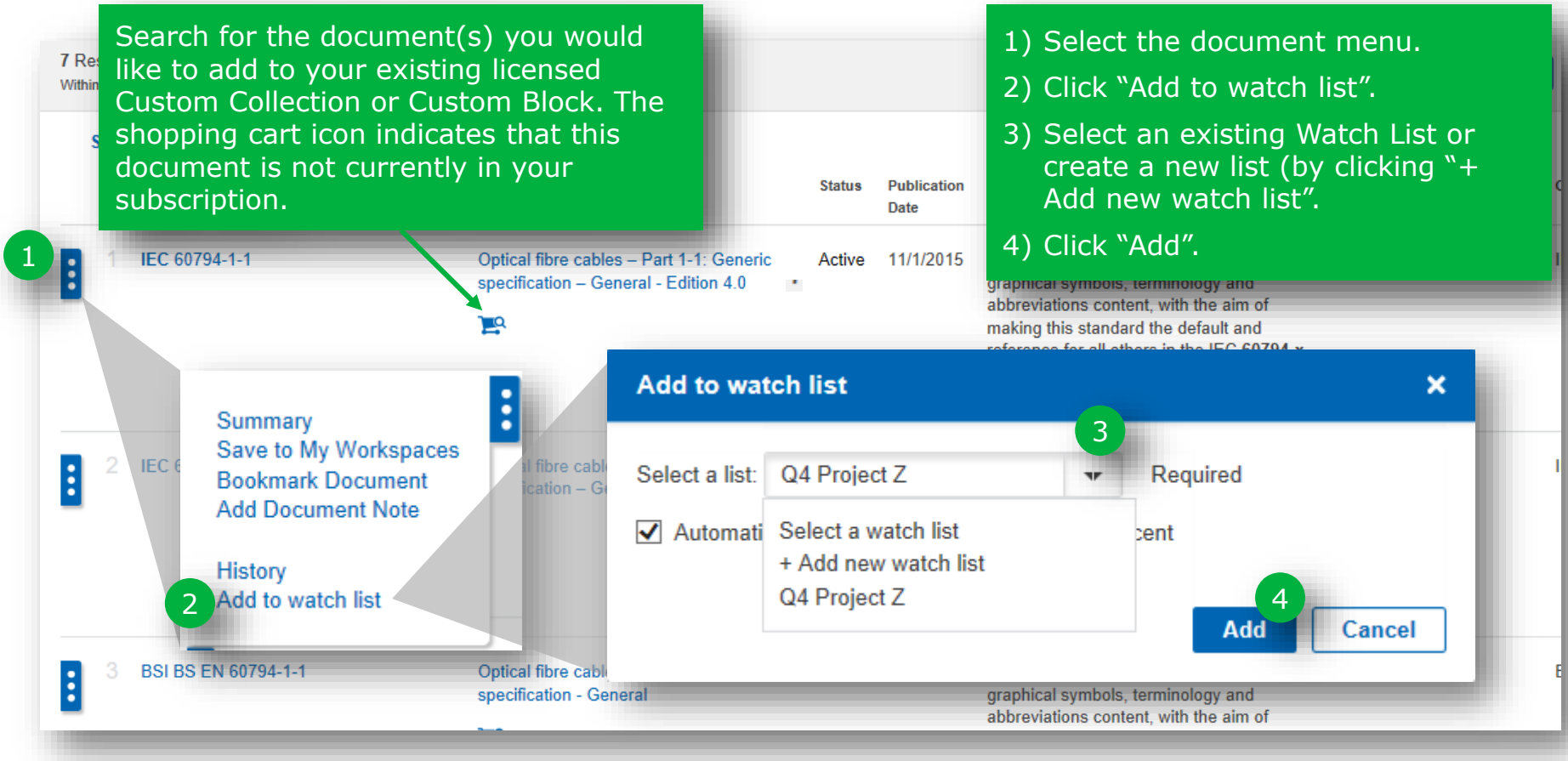
Add Documents to a Watch List

You can add documents to a Watch List directly from the search results table



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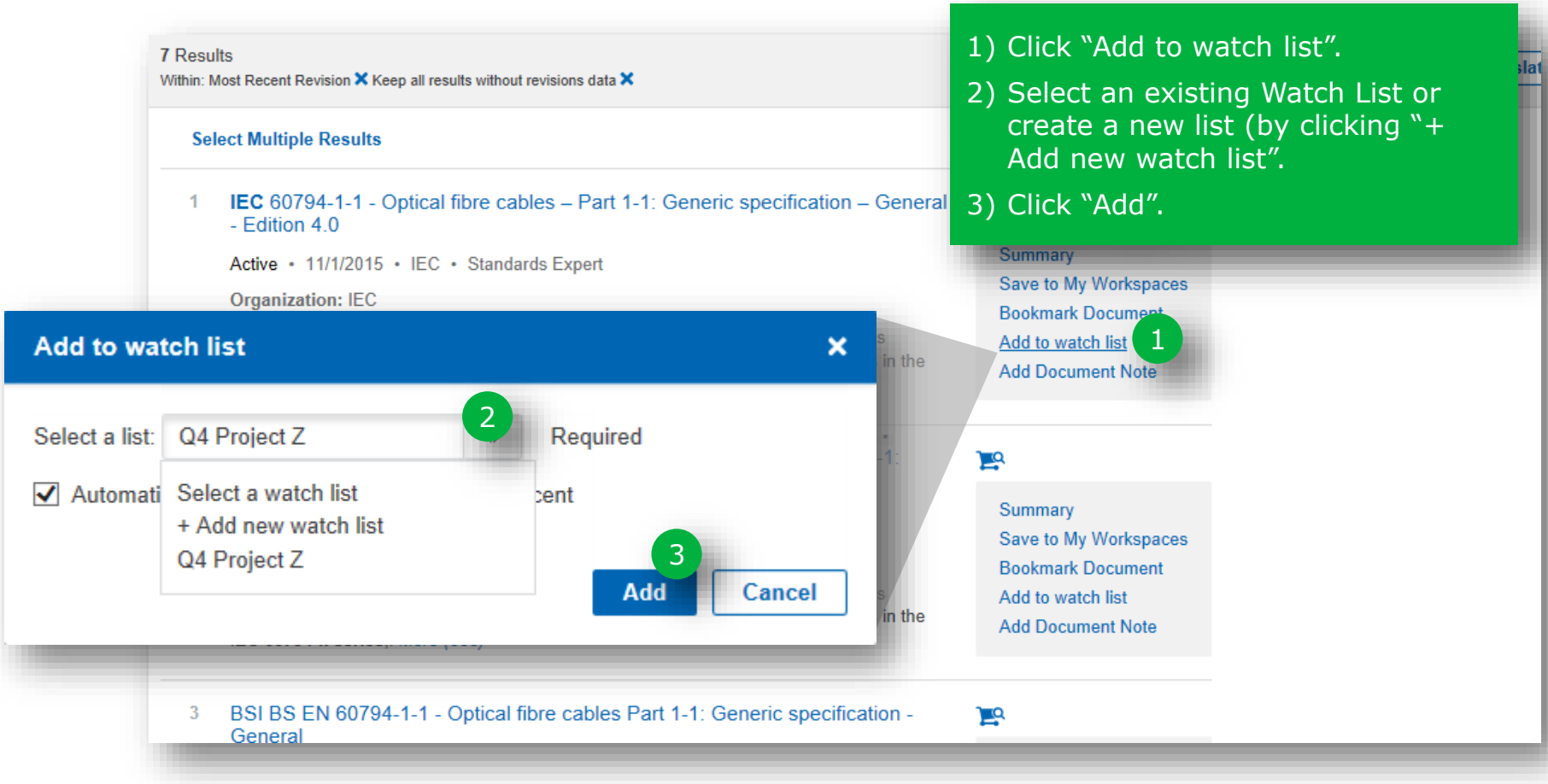
Add Documents to a Watch List

The process is the same when using the list view of search results



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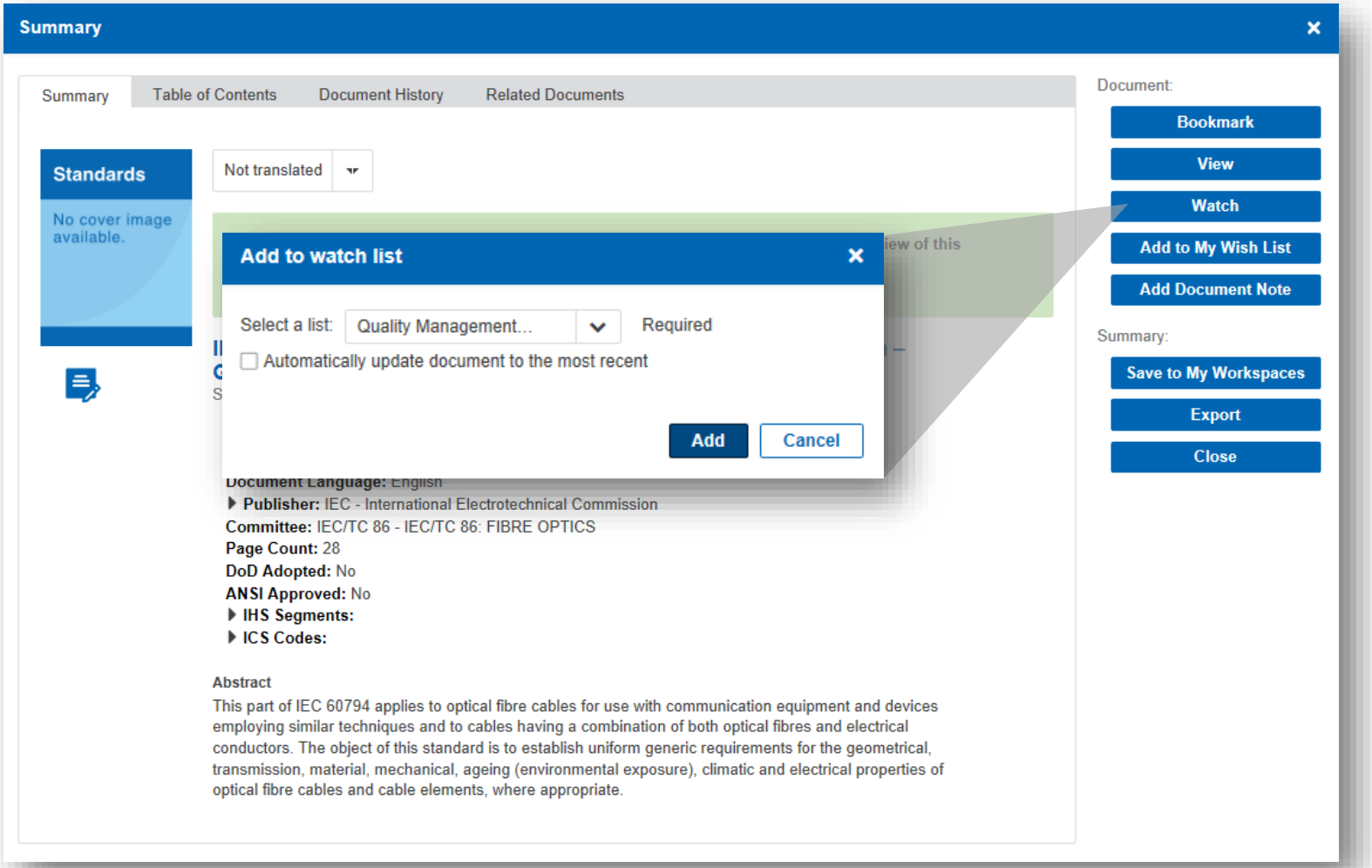
Add Documents to a Watch List

You also can add a document to a Watch List from the Document Summary



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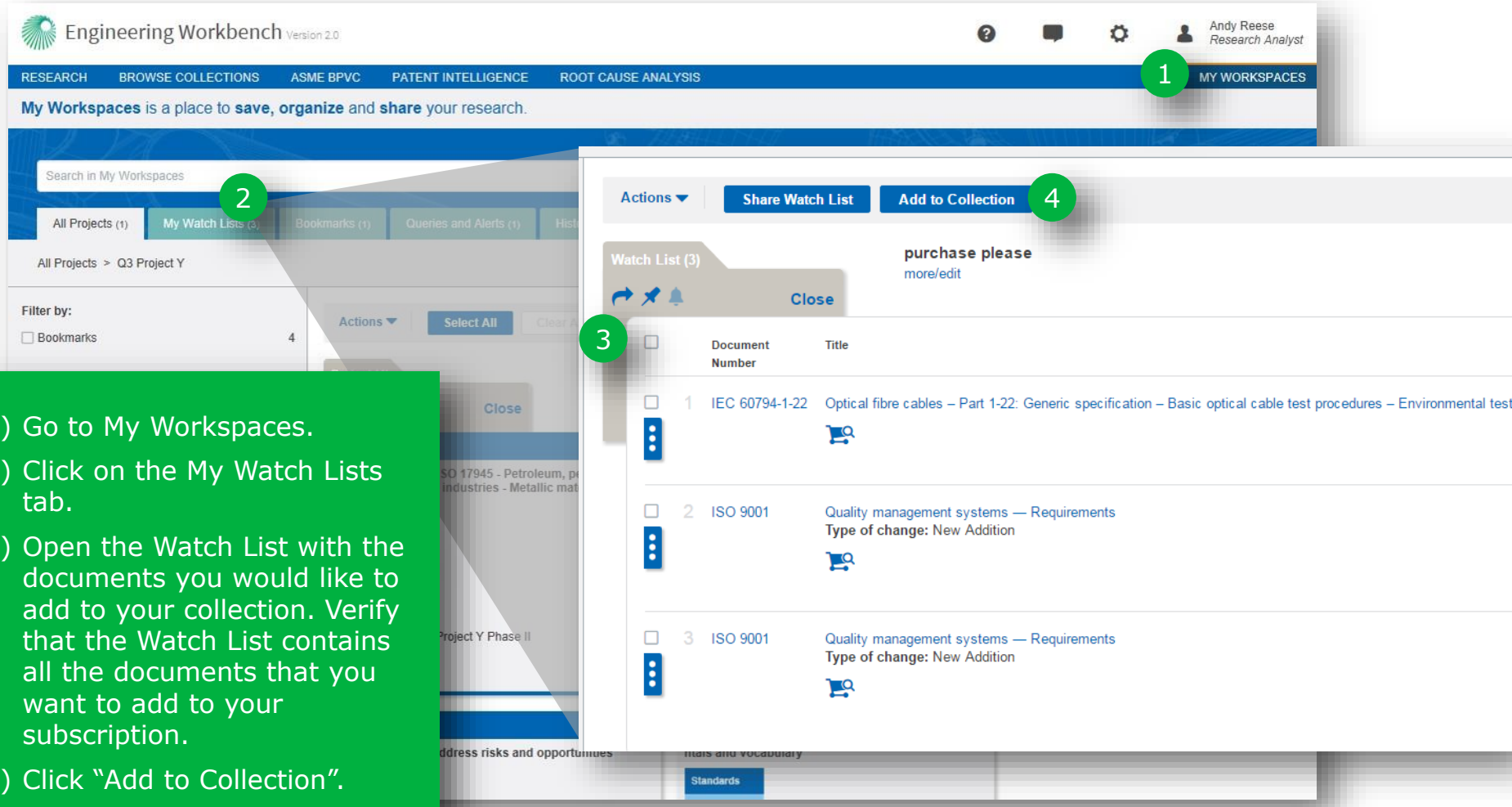
Submit the Documents for Pricing



1) Go to My Workspaces.
2) Click on the My Watch Lists tab.
3) Open the Watch List with the documents you would like to add to your collection. Verify that the Watch List contains all the documents that you want to add to your subscription.
4) Click "Add to Collection".

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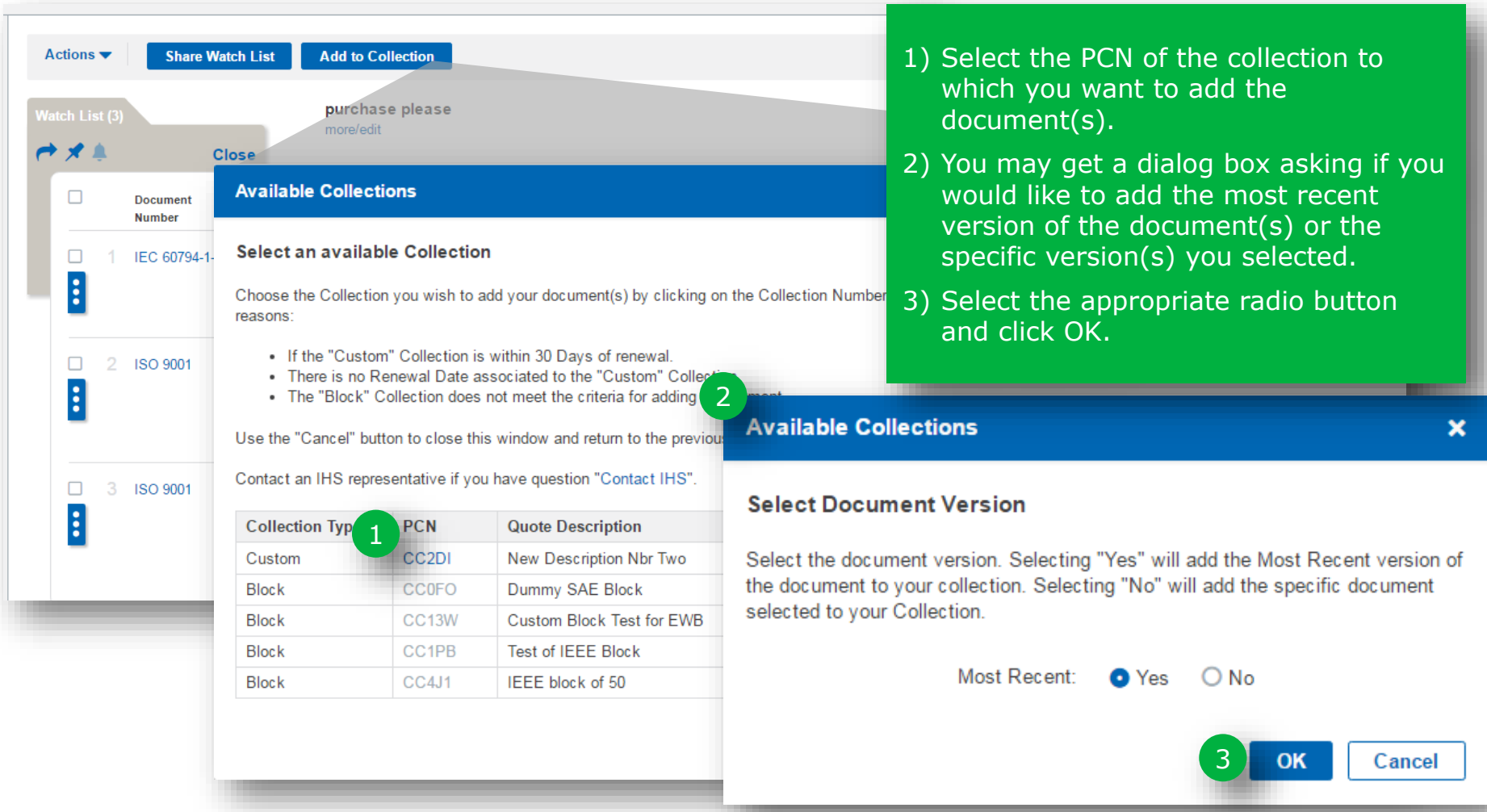
Submit the Documents for Pricing



1) Select the PCN of the collection to which you want to add the document(s).
2) You may get a dialog box asking if you would like to add the most recent version of the document(s) or the specific version(s) you selected.
3) Select the appropriate radio button and click OK.

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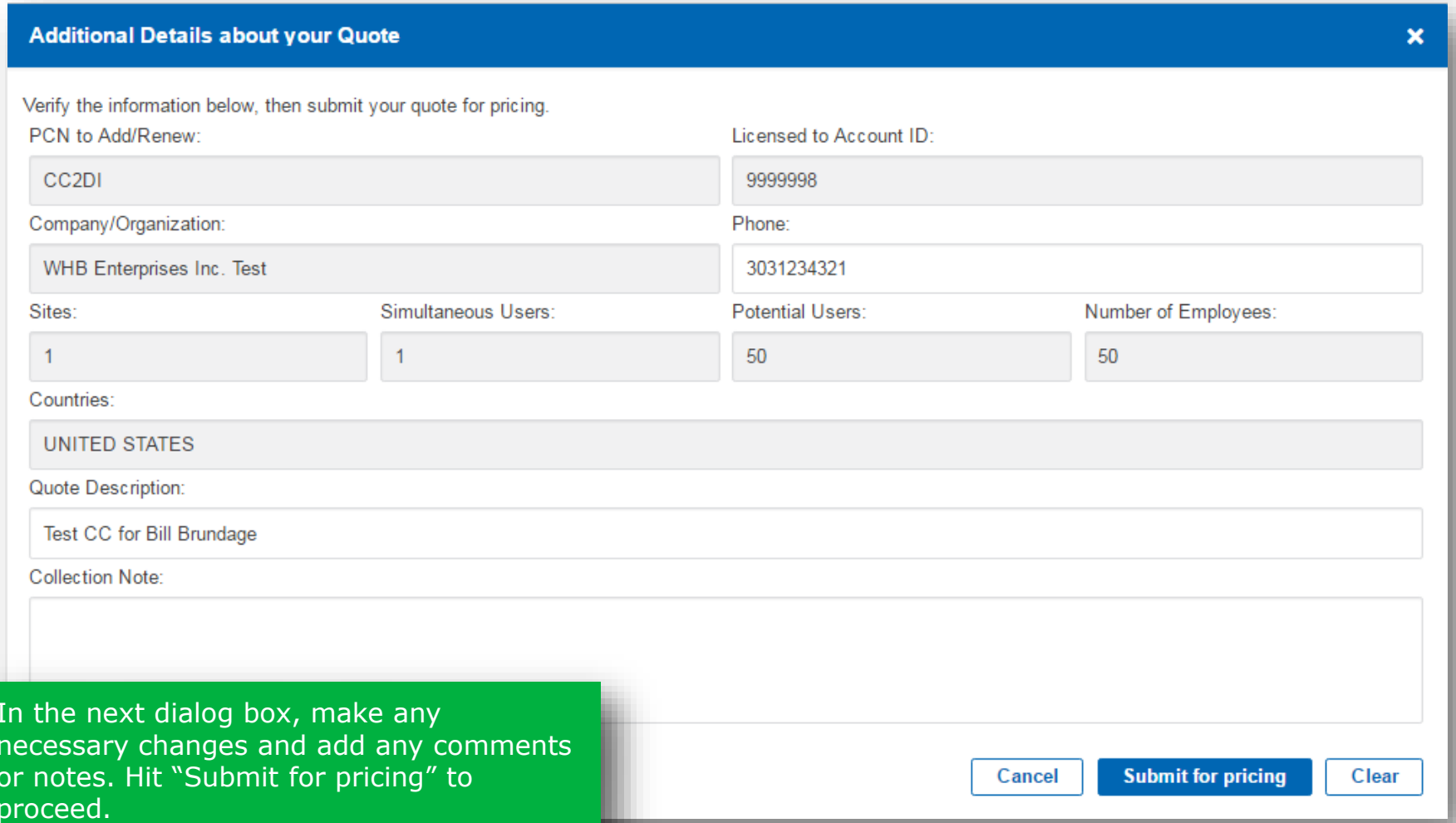
Submit the Documents for Pricing



In the next dialog box, make any necessary changes and add any comments or notes. Hit "Submit for pricing" to proceed.

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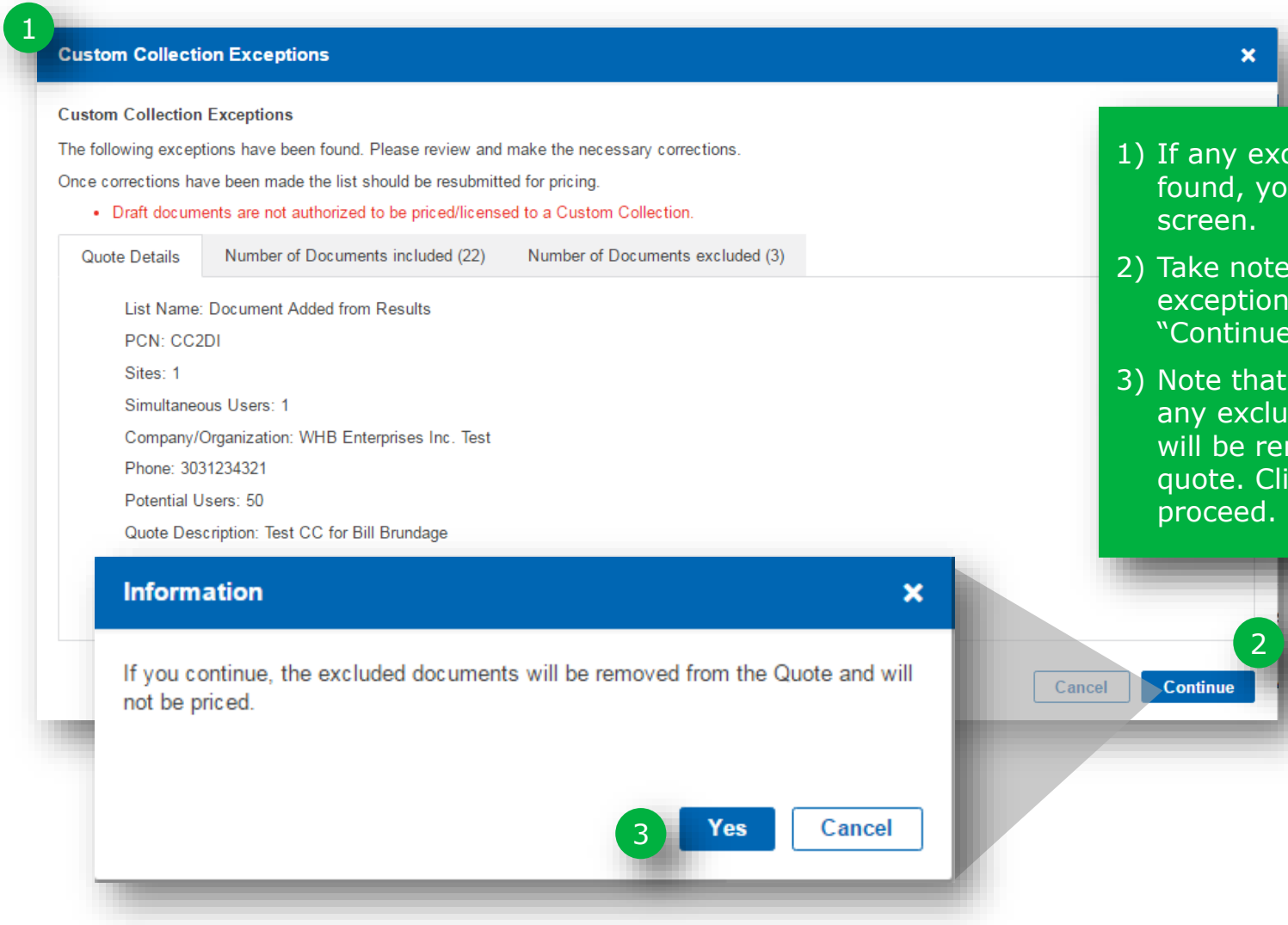
Submit the Documents for Pricing



1) If any exceptions are found, you will see this screen.
2) Take note of any exceptions, and hit "Continue" to proceed.
3) Note that if you proceed, any excluded documents will be removed from the quote. Click "Yes" to proceed.

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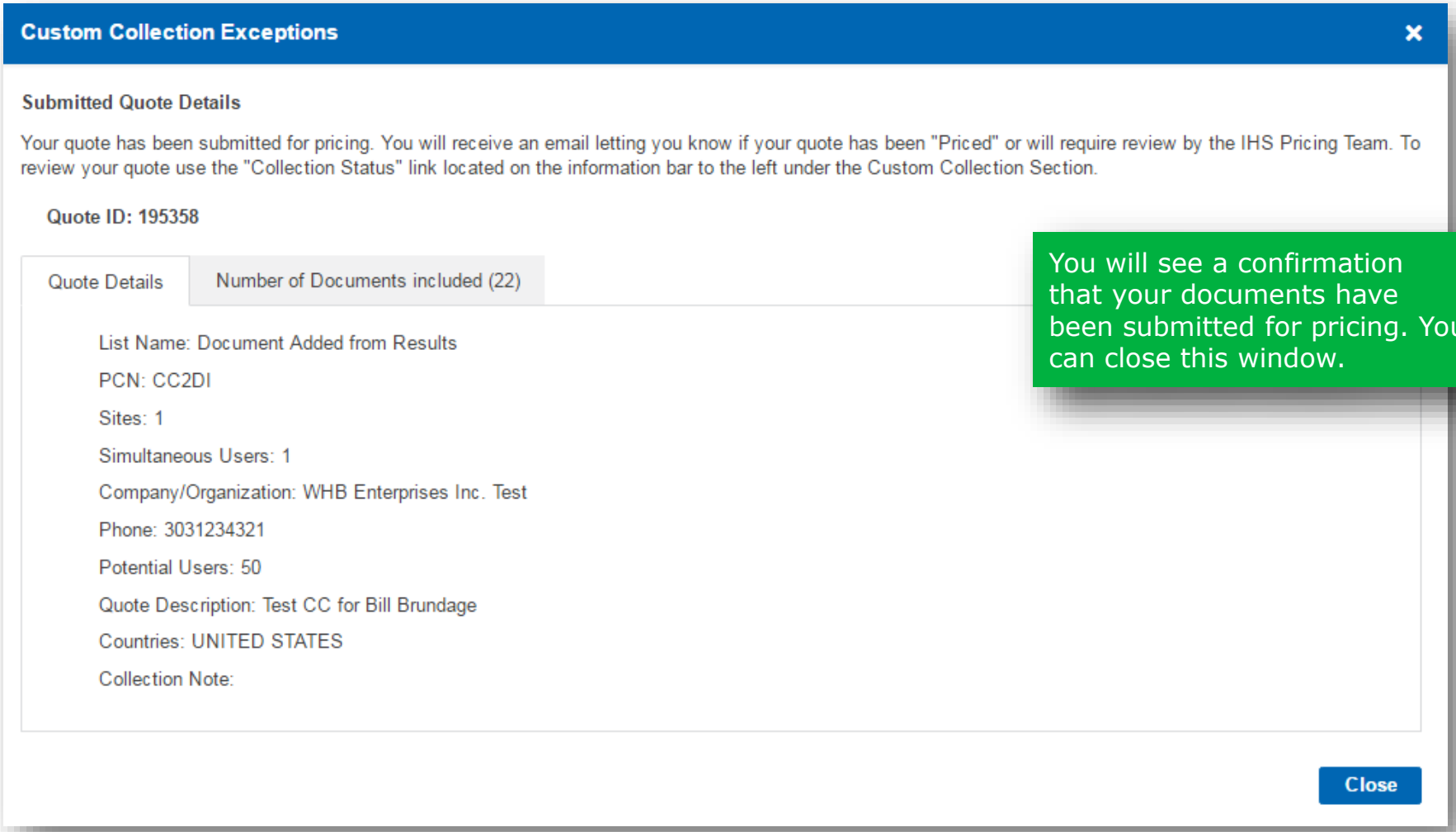
Submit the Documents for Pricing



You will see a confirmation that your documents have been submitted for pricing. You can close this window.

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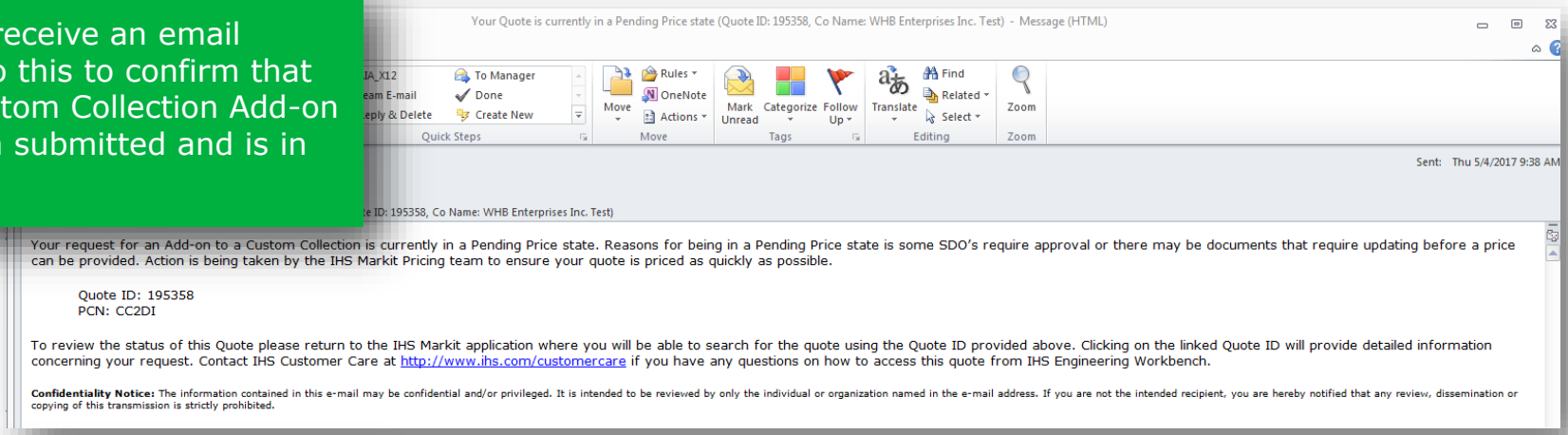
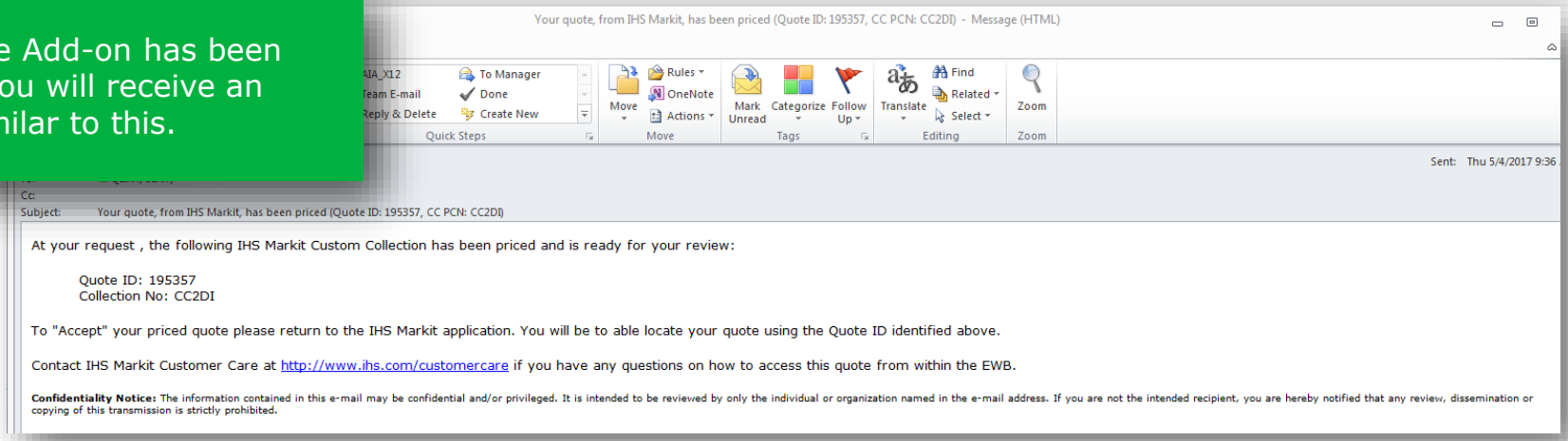
Accept your price quote

You will receive an email similar to this to confirm that your Custom Collection Add-on has been submitted and is in pricing.



When the Add-on has been priced, you will receive an email similar to this.



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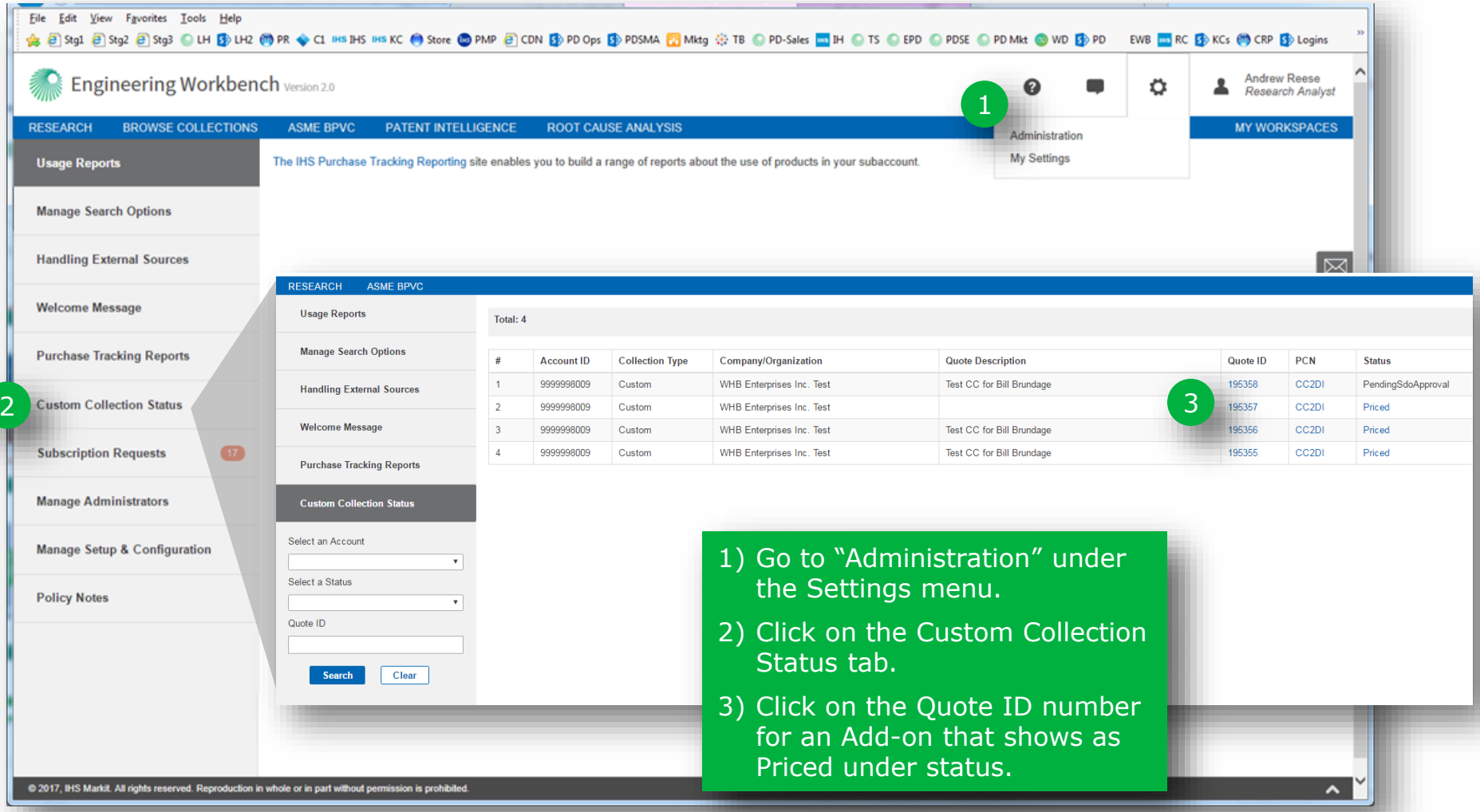
Accept your price quote



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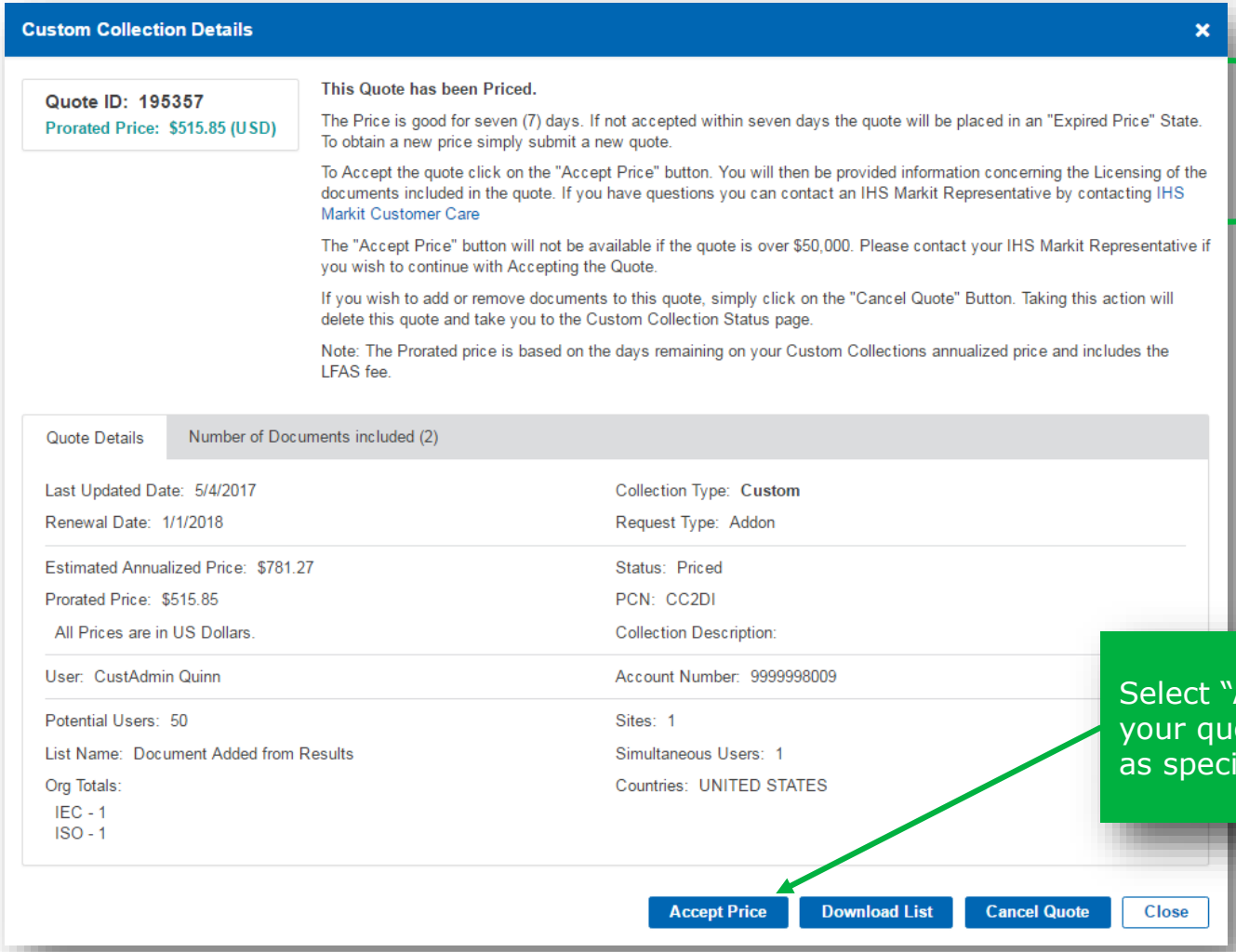
Accept your price quote



Note that the quote price is good for seven (7) days.

Select “Accept Price” to confirm your quote and accept the pricing as specified.

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For assistance with Engineering Workbench

Contact the IHS Markit Customer Care Center of Excellence for your region

IHS Markit Customer Care

Monday 12:00am (UTC) to Saturday 12:00am (UTC)

(Sunday 8:00 PM ET to Friday 8:00 PM ET)

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