



IHS Markit™

# Adding Documents to a Custom Collection or Custom Block

User Guide for Engineering Workbench

*Updated June 20, 2017*

## Objectives of this Presentation

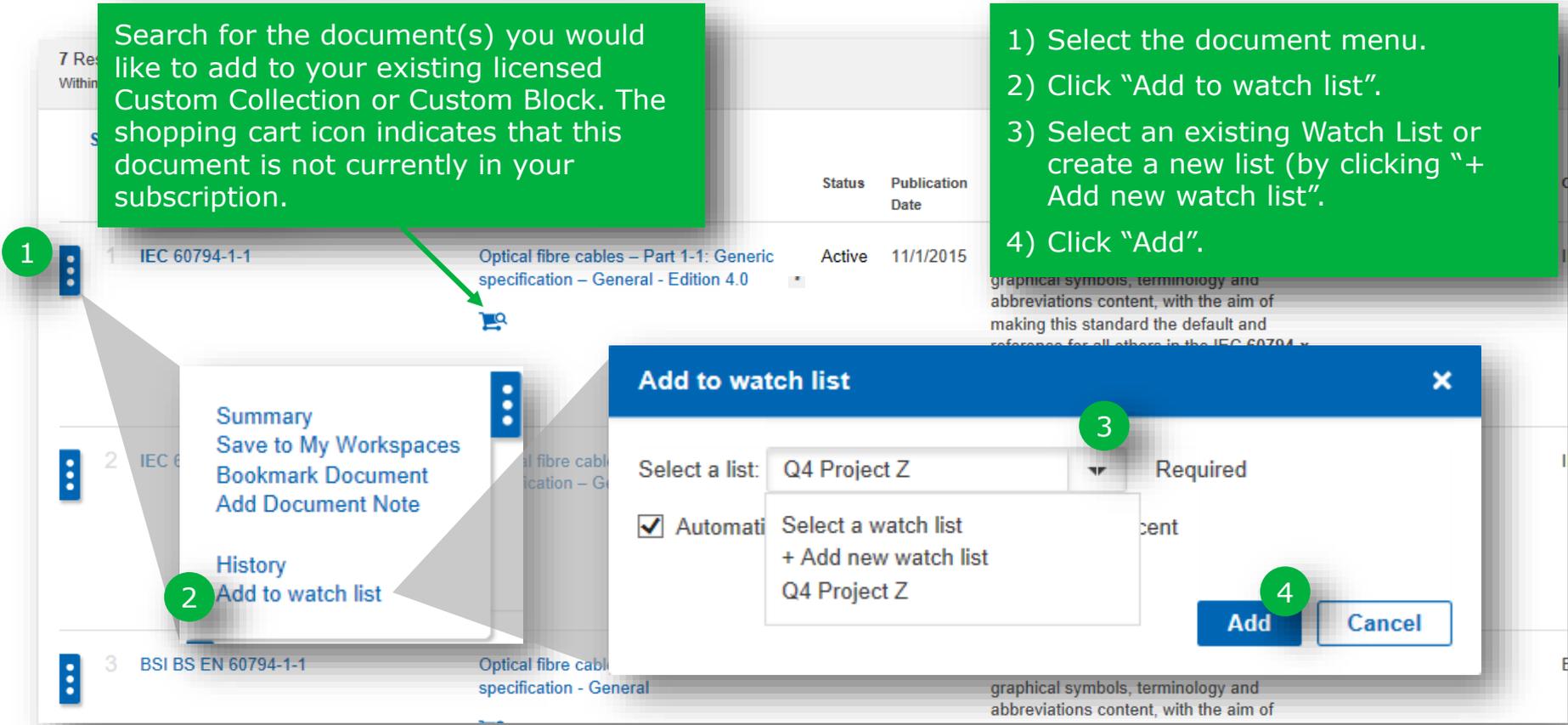
- Learn how to add documents to an existing licensed Custom Collection or Custom Block following these steps:
  - >Add documents to a Watch List
  - >Submit the documents for pricing
  - >Accept your price quote

# Add Documents to a Watch List

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

Search for the document(s) you would like to add to your existing licensed Custom Collection or Custom Block. The shopping cart icon indicates that this document is not currently in your subscription.

- 1) Select the document menu.
- 2) Click "Add to watch list".
- 3) Select an existing Watch List or create a new list (by clicking "+ Add new watch list").
- 4) Click "Add".

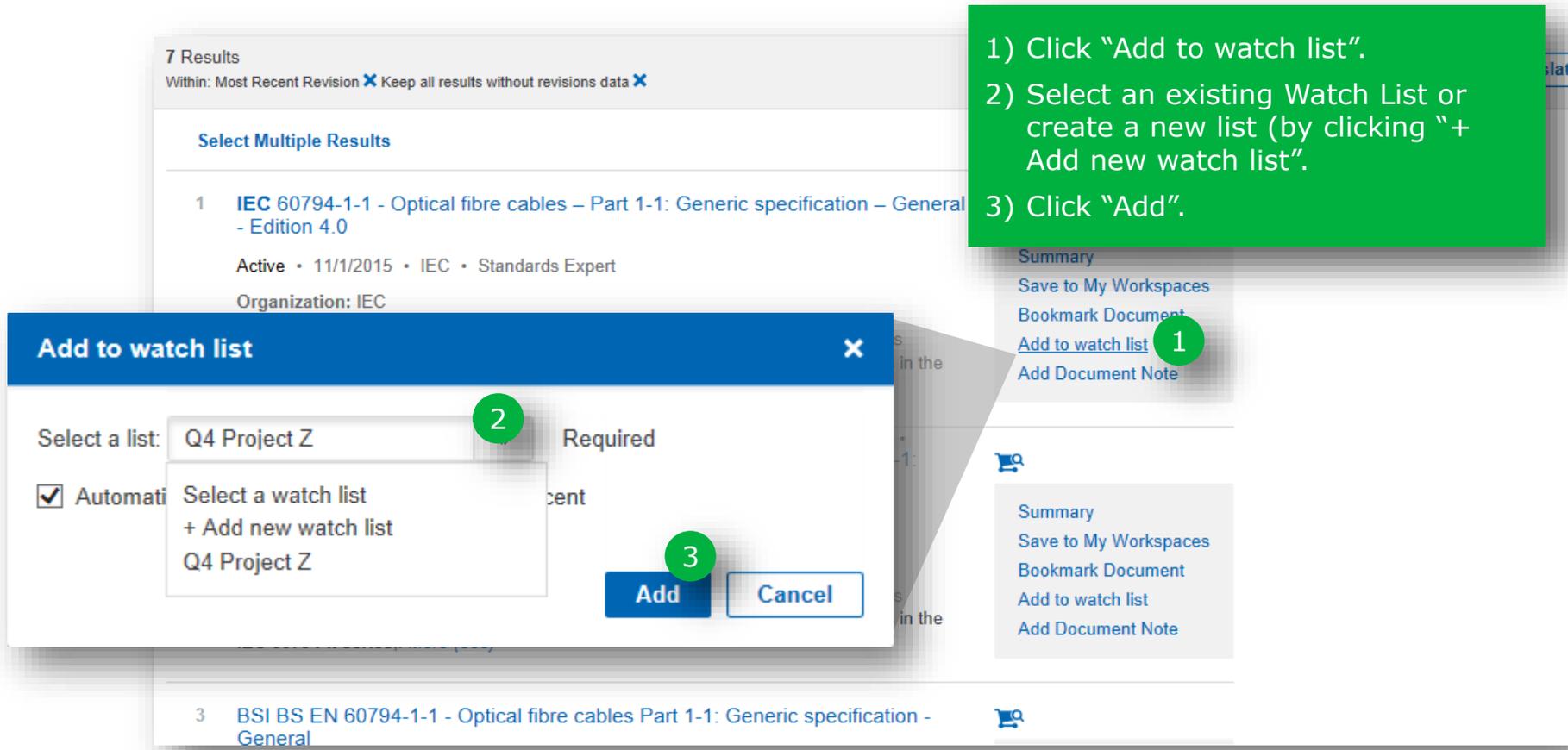


The screenshot shows a search results table with columns for document ID, title, status, and publication date. A shopping cart icon is visible next to the first document. A document menu is open for the first document, showing options like 'Summary', 'Save to My Workspaces', 'Bookmark Document', 'Add Document Note', 'History', and 'Add to watch list'. The 'Add to watch list' dialog box is open, showing a dropdown menu for 'Select a list' with options 'Q4 Project Z' and '+ Add new watch list'. The 'Automatically add to watch list' checkbox is checked. The 'Add' button is highlighted.

	Status	Publication Date
1 IEC 60794-1-1	Active	11/1/2015
2 IEC 60794-1-1		
3 BSI BS EN 60794-1-1		

# Add Documents to a Watch List

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



The screenshot shows a search results page with 7 results. A modal dialog titled "Add to watch list" is open, showing a dropdown menu for selecting a watch list. A green box with numbered instructions (1, 2, 3) is overlaid on the right side of the page, pointing to the "Add to watch list" link in the document actions menu and the "Add" button in the dialog.

**1) Click "Add to watch list".**

**2) Select an existing Watch List or create a new list (by clicking "+ Add new watch list").**

**3) Click "Add".**

**Dialog Box Content:**

**Add to watch list** [Close]

Select a list: Q4 Project Z [2] Required

Automati Select a watch list cent

+ Add new watch list

Q4 Project Z

[Add] [3] [Cancel]

**Document Actions Menu:**

- Summary
- Save to My Workspaces
- Bookmark Document
- Add to watch list [1]
- Add Document Note

**Document Details:**

1 IEC 60794-1-1 - Optical fibre cables – Part 1-1: Generic specification – General - Edition 4.0

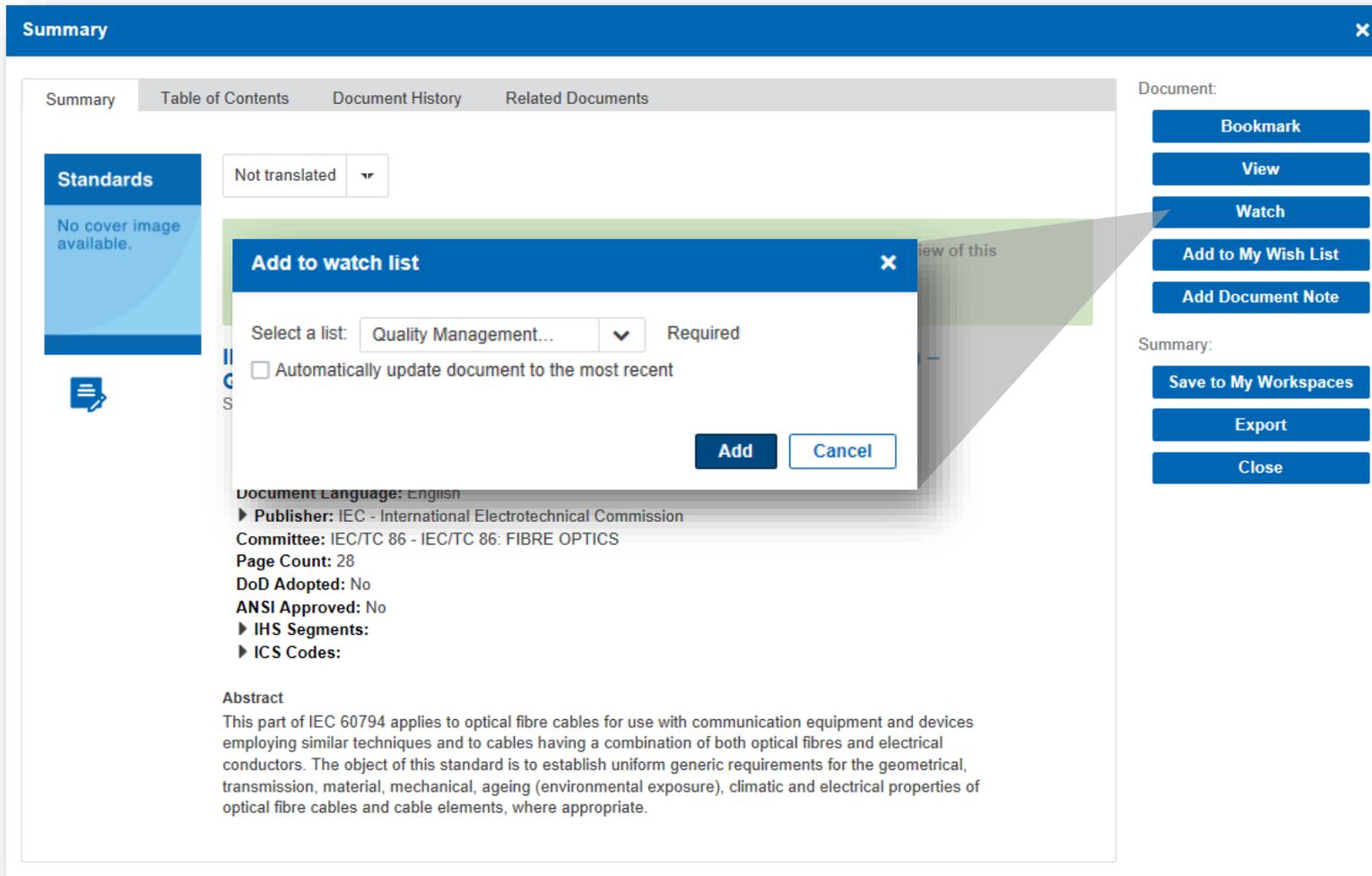
Active • 11/1/2015 • IEC • Standards Expert

Organization: IEC

3 BSI BS EN 60794-1-1 - Optical fibre cables Part 1-1: Generic specification - General

# Add Documents to a Watch List

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



The screenshot shows a document summary page with a blue header and a white main content area. The page is titled 'Summary' and has tabs for 'Summary', 'Table of Contents', 'Document History', and 'Related Documents'. On the left, there is a 'Standards' section with a blue background and a 'No cover image available.' message. Below this is a 'Not translated' dropdown menu. The main content area displays document details: 'Document Language: English', 'Publisher: IEC - International Electrotechnical Commission', 'Committee: IEC/TC 86 - IEC/TC 86: FIBRE OPTICS', 'Page Count: 28', 'DoD Adopted: No', 'ANSI Approved: No', 'IHS Segments:', and 'ICS Codes:'. Below this is an 'Abstract' section with text describing the document's content. On the right side, there is a 'Document:' section with buttons for 'Bookmark', 'View', 'Watch', 'Add to My Wish List', and 'Add Document Note'. Below that is a 'Summary:' section with buttons for 'Save to My Workspaces', 'Export', and 'Close'. An 'Add to watch list' dialog box is open in the center, with a dropdown menu set to 'Quality Management...' and a 'Required' label. The dialog box has an 'Add' button and a 'Cancel' button. A grey arrow points from the 'Watch' button in the 'Document:' section to the 'Add to watch list' dialog box.



# Submit the Documents for Pricing

Actions ▾ Share Watch List Add to Collection

Watch List (3) purchase please more/edit

Close

Available Collections

Select an available Collection

Choose the Collection you wish to add your document(s) by clicking on the Collection Number reasons:

- If the "Custom" Collection is within 30 Days of renewal.
- There is no Renewal Date associated to the "Custom" Collection.
- The "Block" Collection does not meet the criteria for adding documents.

Use the "Cancel" button to close this window and return to the previous page.

Contact an IHS representative if you have question "Contact IHS".

Collection Type	PCN	Quote Description
Custom	CC2DI	New Description Nbr Two
Block	CC0FO	Dummy SAE Block
Block	CC13W	Custom Block Test for EWB
Block	CC1PB	Test of IEEE Block
Block	CC4J1	IEEE block of 50

- 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.

Available Collections

Select Document Version

Select the document version. Selecting "Yes" will add the Most Recent version of the document to your collection. Selecting "No" will add the specific document selected to your Collection.

Most Recent:  Yes  No

3 OK Cancel

# Submit the Documents for Pricing

**Additional Details about your Quote** ✕

Verify the information below, then submit your quote for pricing.

PCN to Add/Renew:	Licensed to Account ID:		
<input type="text" value="CC2DI"/>	<input type="text" value="9999998"/>		
Company/Organization:	Phone:		
<input type="text" value="WHB Enterprises Inc. Test"/>	<input type="text" value="3031234321"/>		
Sites:	Simultaneous Users:	Potential Users:	Number of Employees:
<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="50"/>	<input type="text" value="50"/>
Countries:			
<input type="text" value="UNITED STATES"/>			
Quote Description:			
<input type="text" value="Test CC for Bill Brundage"/>			
Collection Note:			
<input style="height: 50px;" type="text"/>			

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

# Submit the Documents for Pricing

1

**Custom Collection Exceptions** ✕

**Custom Collection Exceptions**

The following exceptions have been found. Please review and make the necessary corrections.  
Once corrections have been made the list should be resubmitted for pricing.

- Draft documents are not authorized to be priced/licensed to a Custom Collection.

Quote Details

Number of Documents included (22)

Number of Documents excluded (3)

List Name: Document Added from Results

PCN: CC2DI

Sites: 1

Simultaneous Users: 1

Company/Organization: WHB Enterprises Inc. Test

Phone: 3031234321

Potential Users: 50

Quote Description: Test CC for Bill Brundage

**Information** ✕

If you continue, the excluded documents will be removed from the Quote and will not be priced.

Cancel
Continue

Yes
Cancel

- 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.

2

3

# Submit the Documents for Pricing

**Custom Collection Exceptions** ✕

**Submitted Quote Details**

Your quote has been submitted for pricing. You will receive an email letting you know if your quote has been "Priced" or will require review by the IHS Pricing Team. To review your quote use the "Collection Status" link located on the information bar to the left under the Custom Collection Section.

**Quote ID: 195358**

Quote Details
Number of Documents included (22)

List Name: Document Added from Results

PCN: CC2DI

Sites: 1

Simultaneous Users: 1

Company/Organization: WHB Enterprises Inc. Test

Phone: 3031234321

Potential Users: 50

Quote Description: Test CC for Bill Brundage

Countries: UNITED STATES

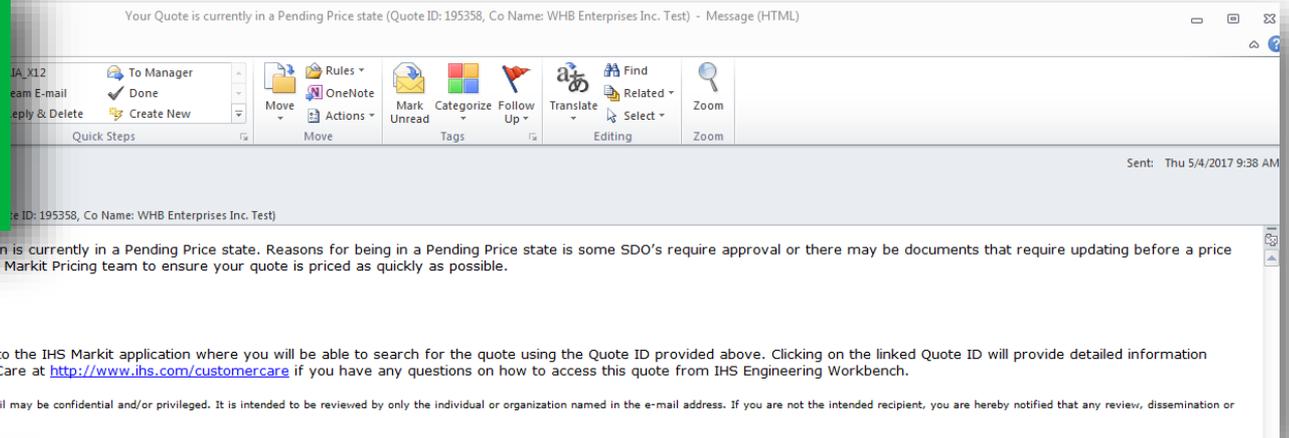
Collection Note:

Close

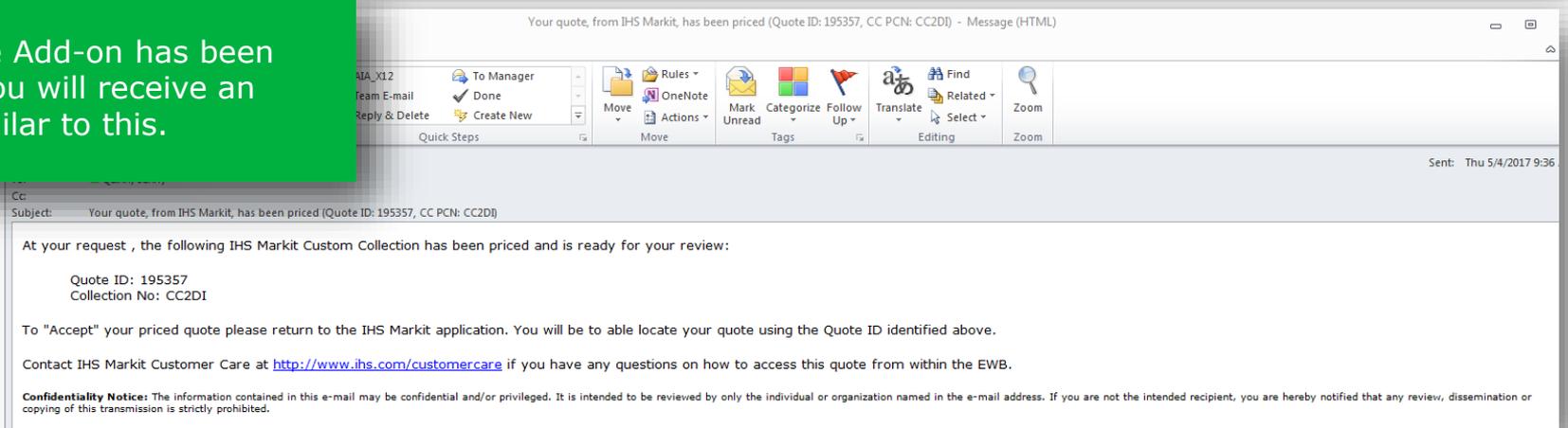
You will see a confirmation that your documents have been submitted for pricing. You can close this window.

# Accept your price quote

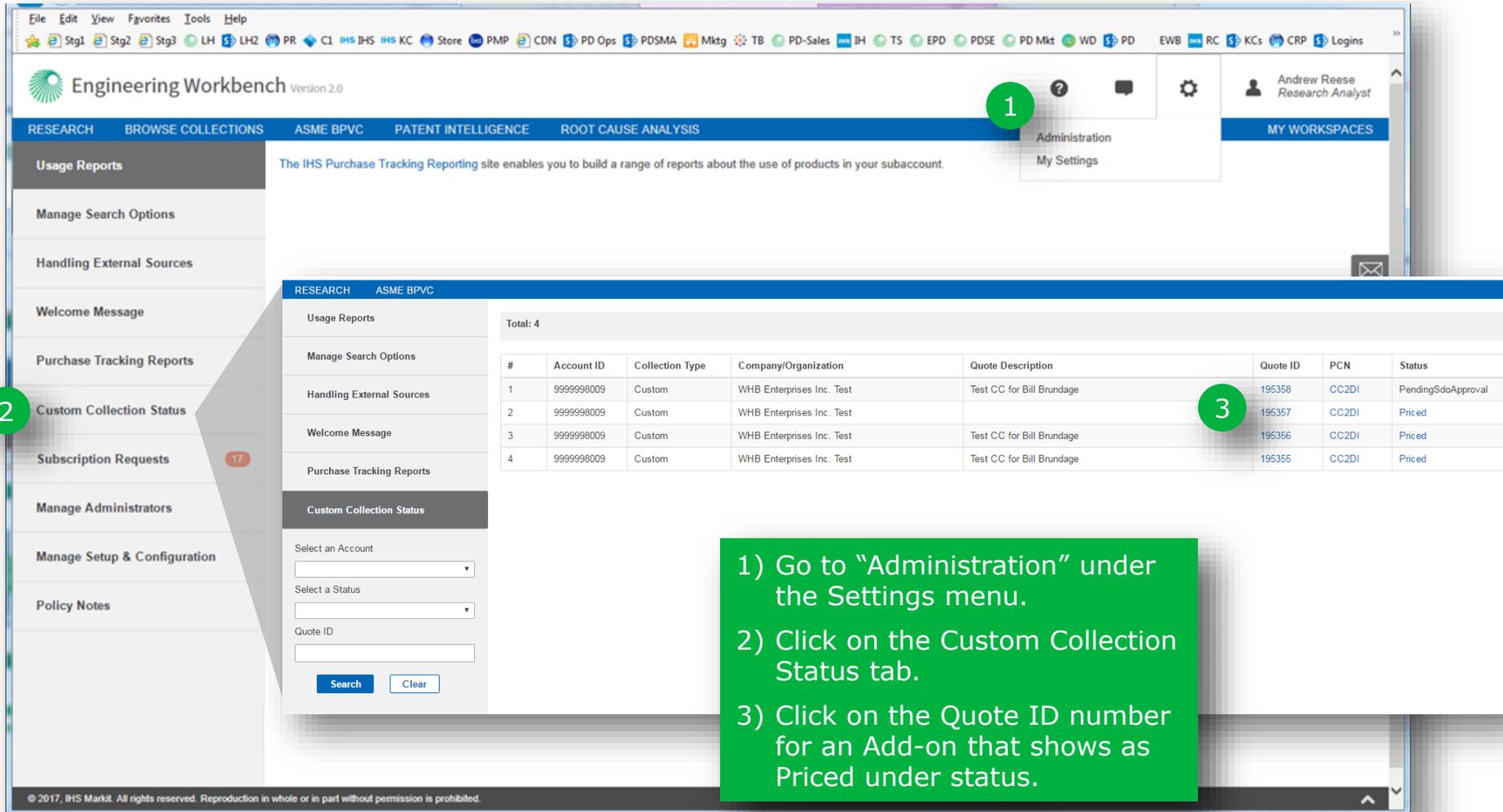
You will receive an email similar to this to confirm that your Custom Collection Add-on has been submitted and is in pricing.



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



# Accept your price quote



The screenshot shows the Engineering Workbench interface. The top navigation bar includes 'RESEARCH', 'BROWSE COLLECTIONS', 'ASME BPVC', 'PATENT INTELLIGENCE', and 'ROOT CAUSE ANALYSIS'. The left sidebar contains various options, with 'Custom Collection Status' highlighted by a green circle with the number 2. The main content area displays a table of quotes with columns for #, Account ID, Collection Type, Company/Organization, Quote Description, Quote ID, PCN, and Status. A green circle with the number 3 highlights the 'Quote ID' column for the first row. A green box at the bottom right contains the following instructions:

- 1) Go to "Administration" under the Settings menu.
- 2) Click on the Custom Collection Status tab.
- 3) Click on the Quote ID number for an Add-on that shows as Priced under status.

# Accept your price quote

Custom Collection Details
✕

**Quote ID: 195357**  
**Prorated Price: \$515.85 (USD)**

**This Quote has been Priced.**

The Price is good for seven (7) days. If not accepted within seven days the quote will be placed in an "Expired Price" State. To obtain a new price simply submit a new quote.

To Accept the quote click on the "Accept Price" button. You will then be provided information concerning the Licensing of the documents included in the quote. If you have questions you can contact an IHS Markit Representative by contacting [IHS Markit Customer Care](#)

The "Accept Price" button will not be available if the quote is over \$50,000. Please contact your IHS Markit Representative if you wish to continue with Accepting the Quote.

If you wish to add or remove documents to this quote, simply click on the "Cancel Quote" Button. Taking this action will delete this quote and take you to the Custom Collection Status page.

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

Quote Details		Number of Documents included (2)	
Last Updated Date: 5/4/2017	Collection Type: <b>Custom</b>		
Renewal Date: 1/1/2018	Request Type: Addon		
Estimated Annualized Price: \$781.27	Status: Priced		
Prorated Price: \$515.85	PCN: CC2DI		
All Prices are in US Dollars.	Collection Description:		
User: CustAdmin Quinn	Account Number: 9999998009		
Potential Users: 50	Sites: 1		
List Name: Document Added from Results	Simultaneous Users: 1		
Org Totals:	Countries: UNITED STATES		
IEC - 1			
ISO - 1			

Accept Price
Download List
Cancel Quote
Close

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

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

# 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)

### Phone

**Americas:**

Toll Free: +1 800 447 2273

Outside US/Canada: +1 303 858 6187

**Europe, Middle East, Africa:**

+44 1344 328 300

**Asia Pacific:**

+604 291 3600

### Email / Chat

**Global Email:** [CustomerCare@ihsmarkit.com](mailto:CustomerCare@ihsmarkit.com)

**Chat:** [www.ih.com/CustomerCare](http://www.ih.com/CustomerCare)

**Web Page:** [www.ih.com/CustomerCare](http://www.ih.com/CustomerCare)