Engineering Workbench Quick Start Guide

Getting started with the IHS Markit solution for standards management and technical knowledge discovery

Introducing you to capabilities for finding, using and managing industry standards and other technical reference information in Engineering Workbench

Get In-Product Help

Guided Tour walks a user through key screens and functionality

Use the “Back” and “Next” buttons to proceed step-by-step through the Guided Tour. Use the dropdown menu to select a screen you would like to tour.

Check the “Do not show me this again” box and click “Close” to turn off the Guided Tour. You can always access the Guided Tour again via the Help icon.

Click anywhere outside the Guided Tour box to close out the tour and begin using Engineering Workbench.
Getting Back to the Main IHS Menu

Return to the IHS Menu to access Standards Expert or other IHS Markit products

You can return to the main IHS Menu at any time from Engineering Workbench by clicking on your user name in the upper right-hand corner and using the link from the drop down menu. Returning to the IHS Menu will allow you to access Standards Expert or other IHS Markit products in your subscription.
Home Screen
Welcome Message and “Apps” Display

The “apps” that you have access to are displayed in a single row at the top of the home screen. The apps displayed will vary based on your user profile/”role” settings and your subscriptions.

Your Account Administrator is able to create and display a Welcome Message for your account. The Welcome Message may include text, graphics, and links.
View Your Current Subaccount and User “Role”

Role is displayed beneath user name. View subaccount by hovering over name.

It's easy for you to see which subaccount you are signed into in Engineering Workbench, as well as your current selected user profile, or "role," in Engineering Workbench.

Your current role* is displayed beneath your name/user name.

You can view your subaccount by hovering your cursor over your name.

Sample Account
0123456789

* Roles include:
- "Standards Expert" – for primarily finding and using standards documents; or,
- "Researcher" – for accessing standards alongside documents and resources beyond just standards (eBooks, journals, patents, etc.).

The user role can be set via My Settings under the Tool menu. See this document for more information on setting your user profile/role.
Set Your User Profile

Choose the user profile that matches your research needs

Selecting “I am a Standards Expert only” will limit searches to only standards content and will remove any additional applications from the home page menu, such as Browse Collections, etc.
Set Your User Profile

Set your Search Preferences to better suit your research requirements

Make sure you click “Apply Changes” after setting your preferences so that the changes take effect.

Search Preferences allow you to further configure your searches to meet your research needs.

For example, you can limit your standards searches to include only documents available in your subscriptions, only the most recent revision of standards, or only active standards.
Searching

*Select content collections to search*

Use “Refine Source Selection” to select the content collections (or “knowledge bases”) that you want to search.

Select knowledge bases to search by clicking on the appropriate tab and selecting the collections to search. For example, you can limit your search to specific standards bodies by only checking “Codes & Standards” and then checking only the desired standards bodies to include in your search.

Make sure you click “Apply” after setting your search preferences so that the changes take effect.

Just want to find a standard?

You can quickly and easily find a standard document by setting your user “role” – or profile – to “Standards Expert only” in order to limit your searches to only Codes & Standards by default.

User role can be set via My Settings under the Tool menu. See this document for more information on setting your user profile/role.

Search for a standards body by its acronym or name.
Searching

Enter your search terms in the “Intelligent Search Box”

The Intelligent Search Box automatically distinguishes between a standard document number and keywords.

NOTE: Engineering Workbench will “remember” your last search criteria in a given “app” (Research, Browse Collections, ASME BPVC, etc.) even if you switch between apps. To clear the search criteria and enter new criteria, simply highlight the current text (e.g., by triple clicking in the Search Box) and start typing the new text.
Searching
“Intelligent Search Box” & Query Type Ahead

Document Type Ahead suggests standards documents that match the document number.

Concept Type Ahead suggests concepts that match the keywords.
Searching
“Intelligent Search Box” & Query Type Ahead

The search engine also suggests document matches based on the doc number or keywords, allowing you to click through to a document from the suggestion list without having to execute the query.
Searching

Use Advanced Query Tools

The Advanced Query Tools allow you to build complex queries, and view Recent Queries and Saved Queries.

Note options to limit searches only to documents in your subscriptions, and to return only the most recent revisions and/or active standards.
Searching

Standards-specific pre-filters allow you to find documents faster

Use Advanced Query Tools to apply pre-filters that narrow your search results.

Select desired pre-filters that match your search criteria. For example, you can limit your search to documents from specific organizations (as shown above), or by Document Status, IHS Segment, FSC Codes, and so on. Add all desired pre-filters and click the “Go” button to execute your search.

Make sure you click “Apply” after setting your search preferences so that the changes take effect.
Search Results Display

Table View

The Table View lists Document Number, Title, Status, Publication Date and more in a grid format, making it easy to quickly identify a required document.

Click on this icon for easy access to document information and Save, Export and Bookmark capabilities.

Toggle between List View and Table View using the appropriate icon.
### Search Results Display

#### Table View

<table>
<thead>
<tr>
<th>Document Number</th>
<th>Title</th>
<th>Status</th>
<th>Publication Date</th>
<th>Citation</th>
<th>Publisher</th>
<th>Data Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISO 9001</td>
<td>Quality management systems — Requirements - Fifth edition</td>
<td>Active</td>
<td>9/15/2015</td>
<td>ISO</td>
<td>Standards Expert</td>
<td></td>
</tr>
<tr>
<td>ISO 9001</td>
<td>Quality management systems — Requirements - Quarta edición</td>
<td>Active</td>
<td>9/15/2015</td>
<td>ISO</td>
<td>Standards Expert</td>
<td></td>
</tr>
</tbody>
</table>

**The Shopping Cart icon indicates that a document is not included in your current subscription. Click the icon for options for obtaining access to the document.**

**Select whether to sort by Relevance (default setting) or by Publication Date.**

**You can translate the search results into several languages.**

**Print your search results.**
Search Results Display

Table View

Clicking on “Select Multiple Results” allows you to perform an action on several documents at once.

Check the boxes next to the appropriate documents, then select the action above to perform that action on the selected documents.
Search Results Display

List View

The List View lists document information, along with a contextual summary, based on your search, with search terms highlighted for easy review.

Click the title of a document to open it in the built-in Document Viewer.

Toggle between List View and Table View using the appropriate icon.
Search Results Display

Engineering Workbench can recognize standard document numbers to limit search results to a specific standard.

When Engineering Workbench recognizes that a user is searching for a specific document number, it can limit search results to the most relevant standard document. Users then have the option of clicking “Get more extensive search results for your query” to expand their search.
Search Results Display

Search results highlight the number of “hits” for keyword(s) in a document.

Clicking on “More” will show three top “hits” for the keyword(s) in the document, helping the user decide whether to review the document further, as well as providing further insights from the document without even having to open it.

Search results will highlight the number of “hits” for the user’s keyword(s) in a given document, indicating the relevancy of a document for the user’s search.
Search Results Display

Search facets allow you to quickly narrow your search criteria

Once you have performed a search, use the search facets, or "post filters," to refine your standards search using such criteria as Publication Date, Publisher, Document Language, Standards Class, ICS Code, FSC Code, Posted Date, and more.
Search Results Display
"My Subscriptions" filter

Select whether to view All Sources (based on your selected search criteria) or only documents included in your subscriptions. Your search results will update to reflect your selection.

Filtering to "My Subscriptions" limits search results to only those documents that are included in the user's subscription – this is convenient, for example, if you simply want to quickly find and access a standard in your subscription.

Filtering to "All Sources" allows the user to view search results from all selected sources, based on the parameters set by the user for the search – this is useful when the user is not sure if the information (or document) they need is included in their subscription, or when the user wants to search for answers in a broad set of sources that might be outside their current subscription.
Search Results Display

*Use Document Summary to quickly review material*

In either Table View or List View, select Summary to view an abstract or summary of a document.

You can translate the document information, or view the Table of Contents* and/or Related Documents.

You can choose to bookmark the document, view it in the built-in Document Viewer, or get a PDF of the document.

The Summary can be saved to My Workspaces or Exported.

*Note: not all documents will have a Table of Contents.
Search Results Display

*Use Document Summary to quickly review material*

Where available, click on the “Document History” tab to review available prior revisions of the document.

Where available, use the slide bar to get a longer or shorter summary of the document.

If the document is not included in your organization’s existing subscription, you can request a quote to purchase a copy of the document for personal use.
See Technical Committee Information for Standards

*Technical Committees develop and maintain standards*

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In the Document Summary, view the Technical Committee for those standards where this information is available.

This information also is available in the Summary tab when you are using the Document Viewer to view a standard.

*Note: Not all documents will have a Technical Committee specified.*
View Federal Logistics Information System (FLIS) Data

FLIS data can help you locate parts that meet specifications.

When applicable, users will be presented with an option to access Haystack Gold FLIS (Federal Logistics Integrated System) data via a link in the search results or in the Document Summary.
View Revision Group

Users now have the ability to identify documents that have multiple documents in the same Revision Group.

The revision groups can be reviewed in the document summary.

A Revision Group includes all amendments, notices, and supplements for a specific revision of a given document.
Search Results Display

Open up the Research Assistant tool*

*Research Assistant is an optional tool that will be visible if included in your organization’s subscription.
Search Results Display

*Use the Research Assistant tool to refine your search results or explore a topic*

The Research Assistant tool acts like a virtual subject matter expert, guiding you to precise answers in large bodies of content.

Graphical interface lets engineers quickly drill down to solution.

Faceted filters help users easily refine their searches on the fly, based on date, publisher and more.

*Research Assistant is an optional tool that will be visible if included in your organization’s subscription.*
Document Viewer

The built-in Document Viewer allows even large documents to open instantly

- Document Viewer “streams” documents to allow instant access to even very large documents – no waiting for download.
- Table of Contents lets users immediately navigate to specific sections.
- Create Bookmarks for easy access, or Annotations for project notes to preserve knowledge.

Dynamically generated summaries (1) allow for rapid scanning through large numbers of documents.

Document History (2) and Related Documents (3) let users quickly review the revision history or click through to standards referenced by (or that reference) the document being reviewed.
Document Viewer

Bookmark a document

You can bookmark a specific section of a document, and save the bookmark to your home screen or to a project folder for easy reference later.
Annotate a document

Highlight a section of text to bookmark that specific text, or you can add an Annotation to this section, save the Annotation to your home screen, or add it to a project folder for later use.
Document Viewer

Search for keywords within a document

Use the keyword search feature to locate and navigate directly to specific text within a document.

8.2.3.2 The organization shall retain documented information, as applicable:
   a) on the results of the review;
   b) on any new requirements for the products and services.

8.2.4 Changes to requirements for products and services

The organization shall ensure that relevant documented information is amended, and that relevant persons are made aware of the changed requirements, when the requirements for products and services are changed.

8.3 Design and development of products and services

8.3.1 General

The organization shall establish, implement and maintain a design and development process that is appropriate to ensure the subsequent provision of products and services.

8.3.2 Design and development planning

In determining the stages and controls for design and development, the organization shall consider:
   a) the nature, duration and complexity of the design and development activities;
Download a PDF for use offline

You can download a PDF of the document to your computer or device for personal use offline, if necessary.
Document Viewer

*Use the Document Summary to quickly review the material*

Many documents in Engineering Workbench have dynamically generated summaries that can be saved, exported, and even translated into several different languages.
Document Viewer

Translate the Document Summary

The summary, if available, can be translated into various languages, and the translations can be saved or exported to be shared with colleagues around the globe.
Document Viewer

*Use the Document Summary to quickly review the material*

You can add a document to a Watch List directly from the Summary tab.
Document Viewer

View Document History

The Document History tab shows past revisions of the document, if available, and you can click through to a prior version directly from this tab.

Note the Shopping Cart icon indicating that this document is not part of your organization’s subscription. Click the symbol for information on obtaining a copy of this document.
Document Viewer

View Related Documents

The Related Documents tab shows (where available):

- **Equivalencies** (equivalent documents from other Standards bodies);
- **References** (other documents referred to in this standard); and,
- **“Referenced by” documents** (other documents that include a reference to this standard)

You can click through to any of these documents directly from this tab.
See What Content Is Included in Your Subscription

View the Standards and other content that you can access via your subscriptions

1) Go to “My Settings” from the Tools menu.
2) Click on the “My Subscription Information” tab.
3) View your subscription information, or click on the “PCN” (Product Code Number) link to perform a search for all documents included in that specific PCN.
Find Redline Documents

Redline documents (comparison to the previous version of a document) are now available in Engineering Workbench and accessible for organizations that subscribe to redlines.

*Note: Only documents from specific standards bodies have available redlines. For more information on redlines, contact IHS Markit Customer Care.

The availability of a redline version will be indicated in search results, in the document summary, or in the Related Documents tab of the Document Viewer.

If your organization's subscription includes access to a given redline document, the word "Redline" will be an active link. Clicking the link opens the document directly to the Redline tab in the Document Viewer.
Access Redlines via the Document Viewer

Redlines can be accessed using the Redlines tab in the Document Viewer, where available.
My Workspaces

*Use My Workspaces to store and organize your work documents to meet your project needs*

My Workspaces puts engineers in control of their personal information and saved content within the platform.

Saved content is searchable so users can quickly find needed information.

Project Folders are sharable, so teams have a single source of truth for documentation.

Watch Lists allow users to quickly access standards and set alerts to be notified (or to notify others) when a document updates. Users can manage their alerts so they are always getting the information they need, when they need it.
Wish Lists / Subscription Requests

Use a Wish List / Subscription Request to add documents to your subscription

In the Search Results list, when you set the “Sources” filter to “All Sources,” your results may include documents not included in your organization’s current subscription, as indicated by the Shopping Cart icon.

Clicking on the Shopping Cart icon provides the user with the option to purchase a personal copy of a desired document or add the document to the user’s Wish List.

Click “Add to My List,” then fill in the required justification and click “Submit” to add the document to your Wish List.
Wish Lists / Subscription Requests

*Use a Wish List / Subscription Request to add documents to your subscription*

You can review the status of your Subscription Requests from the personal setting menu.

For guidance on Administrator capabilities for managing Subscription Requests, review the [Engineering Workbench 1.4 Release Notes](#).
ASME BPVC App

*Use the BPVC Table of Contents to quickly search and access the Boiler Code*

For organizations subscribing to the ASME Boiler and Pressure Vessel Code, this new app will provide access to the BPVC's table of contents, allowing users to easily access and search across the entire collection of ASME BPVC documents.
ASME BPVC App

Use the BPVC Table of Contents to quickly search and access the Boiler Code

Use the left-hand textual listing or the graphical navigation at right to navigate to a specific section of the Boiler Code.

Adjust your view to include All Sources or only those documents in your subscription (“My Subscriptions”)
ASME BPVC App

Use the BPVC Table of Contents to quickly search and access the Boiler Code

Use the Intelligent Search Box for keyword searches within the ASME BPVC.

Use the faceted Table of Contents at left to limit your search to specific edition(s) of the Boiler Code.

Standard capabilities provided by Engineering Workbench – such as Summary, Bookmark, History, and so on – will assist you in working with the Boiler Code.
In-Product Help

Feedback feature

Use the Feedback feature to provide IHS with your direct feedback on Engineering Workbench or to take a brief user survey to help IHS Markit improve the user experience and shape the development roadmap for Engineering Workbench.
For assistance with Engineering Workbench

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

<table>
<thead>
<tr>
<th></th>
<th>Phone</th>
<th>Email / Chat</th>
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<tbody>
<tr>
<td><strong>IHS Markit Customer Care</strong></td>
<td><strong>Monday 12:00am (UTC) to Saturday 12:00am (UTC)</strong></td>
<td><strong>Global Email:</strong> <a href="mailto:CustomerCare@ihsmarkit.com">CustomerCare@ihsmarkit.com</a></td>
</tr>
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<td>(Sunday 8:00 PM ET to Friday 8:00 PM ET)</td>
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<tr>
<td></td>
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<tr>
<td></td>
<td>Outside US/Canada: +1 303 858 6187</td>
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<tr>
<td><strong>Europe, Middle East, Africa:</strong></td>
<td>+44 1344 328 300</td>
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<tr>
<td><strong>Asia Pacific:</strong></td>
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**Web Page:** [www.ihs.com/CustomerCare](http://www.ihs.com/CustomerCare)