

## Set Your User Profile in Engineering Workbench for the Best Research Experience

You have the ability in Engineering Workbench to set your "role" – or user profile – to either "Standards Expert only" or "Research Analyst," depending on your typical research needs. **See Page 2 of this document for instructions on how to set your role.**

### Standards Expert

Set your role to "Standards Expert only" if you usually just need to quickly find and access standard documents. By setting your role to "Standards Expert only," Engineering Workbench will automatically limit your searches to the Codes & Standards knowledge base, allowing you to more quickly identify the needed document. This setting will also remove such apps as Browse Collections from the home page menu, if applicable.

- **Did You Know:** You can choose to have your search results include only documents within your organization's existing IHS Markit subscription, or include the entire Codes & Standards knowledge base of more than 1.7 million documents from 370+ standards organizations (for example, if you wanted to identify applicable standards that are outside your current subscription). *See Page 2 of this document for instructions on how to set your default Search Preferences to search only your subscribed documents.*

### Research Analyst

Set your role to "Research Analyst" if you would like to find documents or information in other knowledge bases to which you might have access, beyond just Codes & Standards. Depending on your organization's subscription with IHS Markit, available knowledge bases could include such content sources as eBooks, industry journals, patents, or even your own corporate sources.

By setting your role to "Research Analyst," Engineering Workbench will automatically include documents or information from your available knowledge bases in your search results. *This is useful if you are researching information about how to correctly implement a standard or specification, doing general research on a topic, or are specifically looking for information outside Codes & Standards, for example, in an eBook or journal article.*

- **Did You Know:** After executing a search, you can use the faceted search filters on the left of the search results list to further limit the parameters of your search and drill down to needed information.

**NOTE:** Regardless of your user role setting, you can choose which Knowledge Bases to include in your search results at any time using "Refine Source Selection," located just above the Search Box on the home screen.

### **More Resources**

- Use this [Quick Start Guide](#) to features in Engineering Workbench
- See this [brief demo video](#) of standards capabilities in Engineering Workbench
- Review this [FAQ](#) about Engineering Workbench and the Early Visibility Program
- Read this [white paper](#) detailing how Engineering Workbench makes finding, using and managing standards easy and convenient

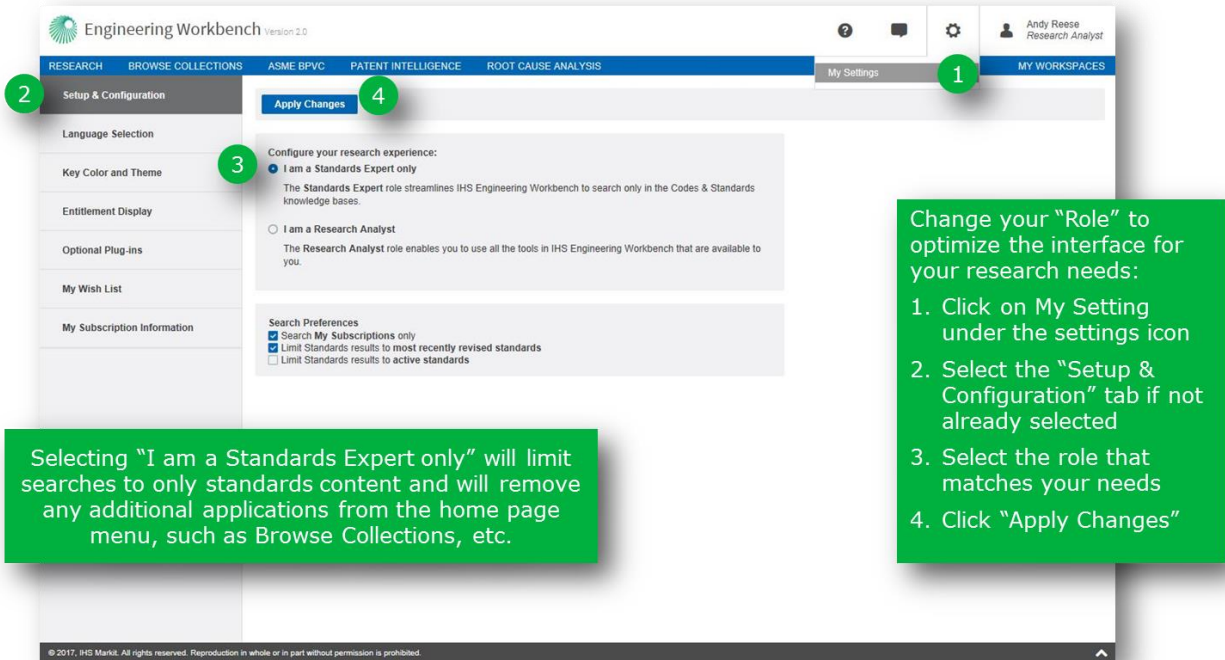
Additional resources and information on training can be found on the [Engineering Workbench Resource Center](#).

**Turn to Page 2 of this document for instructions on how to set your role.**

**For assistance with IHS Engineering Workbench, contact the IHS Markit Customer Care Center of Excellence for your region:** 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. **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).

## Set Your User Profile

Choose the user profile that matches your research needs



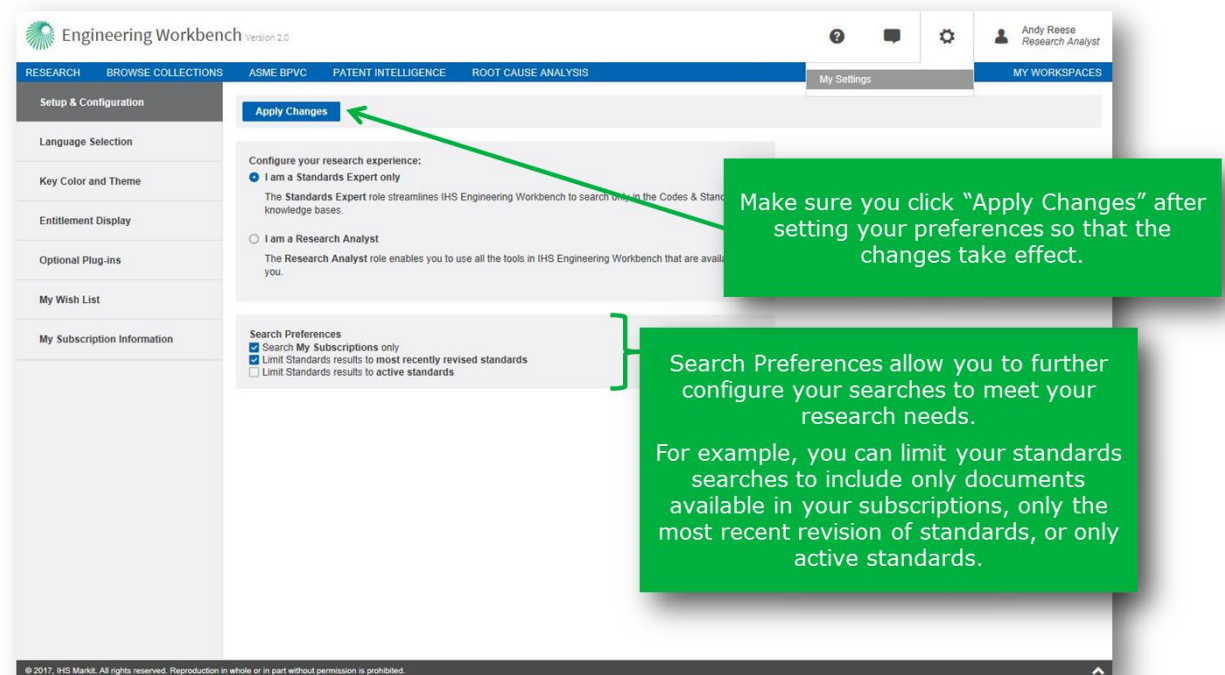
Change your "Role" to optimize the interface for your research needs:

1. Click on My Setting under the settings icon
2. Select the "Setup & Configuration" tab if not already selected
3. Select the role that matches your needs
4. Click "Apply Changes"

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.