

Essential Steps for Effectiveness in Standards Management & Implementation

Greg Jaknunas
IHS Supply Chain

April 3, 2012



IHS.

Agenda

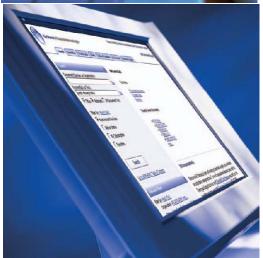
- Brief IHS Standards Expert overview
- Searching
- Personalizing data
- Automatic monitoring
- Document management
- Project management

IHS Standards Expert What and Why?



- A single source for standards across the organization allowing customers to fulfill all or most of their standards needs with one relationship, negotiation and transaction.
- 1.3 million documents, from over 370 standards development organizations.
- A single interface that minimizes confusion and expedites awareness and training.
- Currency and integrity of designs with hourly updating, project/watch lists, and email update alerts
- Improved compliance through information sharing and collaboration of industry requirements and quality standards.

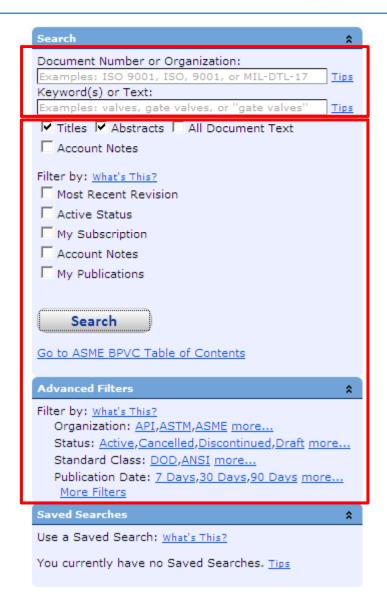






Searching

- On-line tools provide a clean, simple user interface, with powerful search options.
- Document Number and Keywords fields provide a quick method to search for specific standards.
- Additional filters allow users to narrow their results to specific versions, organizations, dates, and more.



Searching *Filters*



- The next generation of ISE (Summer 2012) will include additional search features, such as:
 - Type-ahead on document number field.
 - Document counts on filters, including: Organization, Status, Standard Class, ISC Code, FSC Code, and IHS Segment.

Advanced Filter - Organization Limit results to standards developed by selected organizations

AA - The Aluminum Association Inc. (257)

AABC - Associated Air Balance Council (9)

AAMI - Association for the Advancement of Medical Instrumentation (533)

AASHTO - American Association of State Highway and Transportation Officials (5107)

AATCC - The American Association of Textile Chemists and Colorists (819)

ABMA - ABMA/BOIL - American Boiler Manufacturers Association (18)

ABMA - American Bearing Manufacturers Association (155)

ABNT - Associacso Brasiliera de Normas Tecnicas (2078)

ABS - American Bureau of Shipping (1072)

ACCA - Air Conditioning Contractors of America (98)

ACGIH - American Concrete Of Governmental Industrial Hygienists Inc. (281)

ACI - American Concrete Institute (1052)

ACPA - American Chemical Society (16)

ADA - American Dental Association (202)

ADC - Air Diffusion Council (15)

Advanced Filter - Status Limit results to standards associated with the selected status

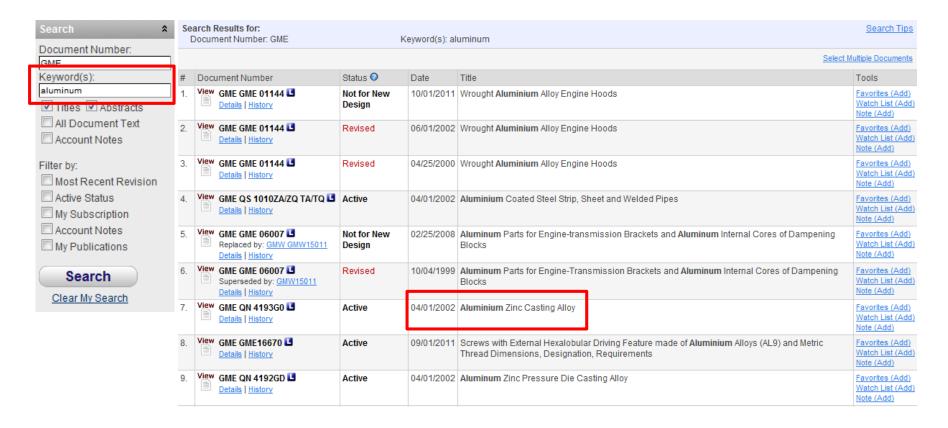
Active (710) Inactive (533) Obsolete (13) Revised (3549) Withdrawn (299)

To select multiple filters: Hold Shift, to select consecutive filters Hold Ctrl, to select individual filters

Searching Regional Language Variations



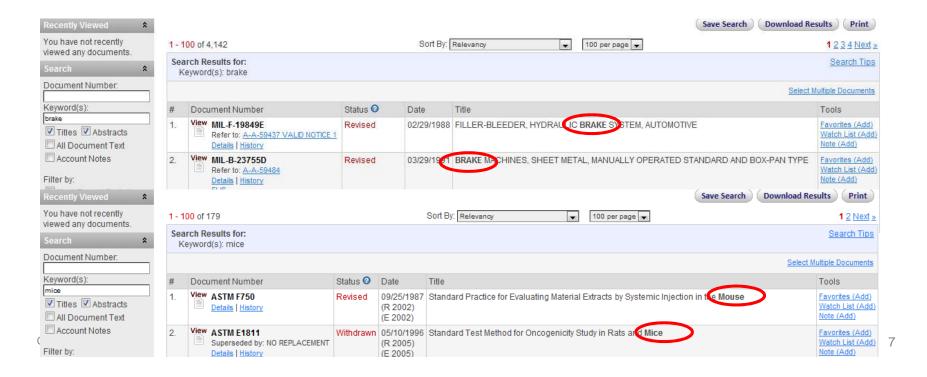
 ISE5 will include the ability to search for regional variants of terms, such as aluminum vs. aluminium.



Searching Boolean Operators and Lemmatization



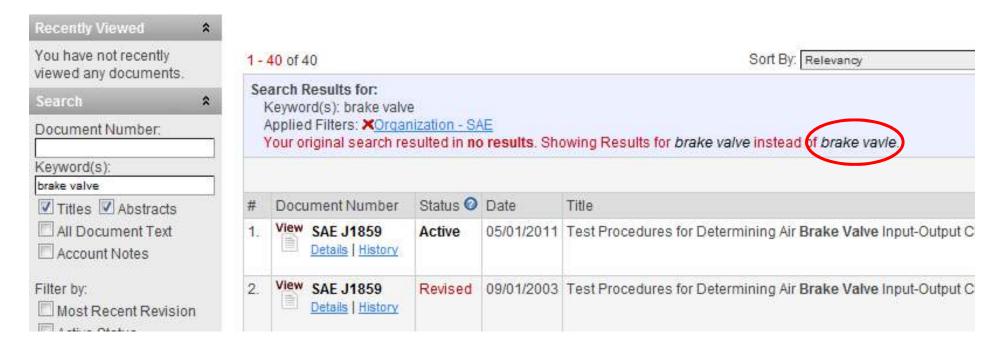
- Boolean operator support has been enhanced AND (+), OR, AND NOT (-).
- Lemmatization supports "term expansion". For example, a search for brake will also return brakes. A search for mice will return mouse.



Searching Spelling Correction



In this example the word "valve" was misspelled as "vavle".
 However the results provided used the correct spelling.
 The user is provided with an explanation of the modified search criteria



Searching Search Results Relevancy Ranking

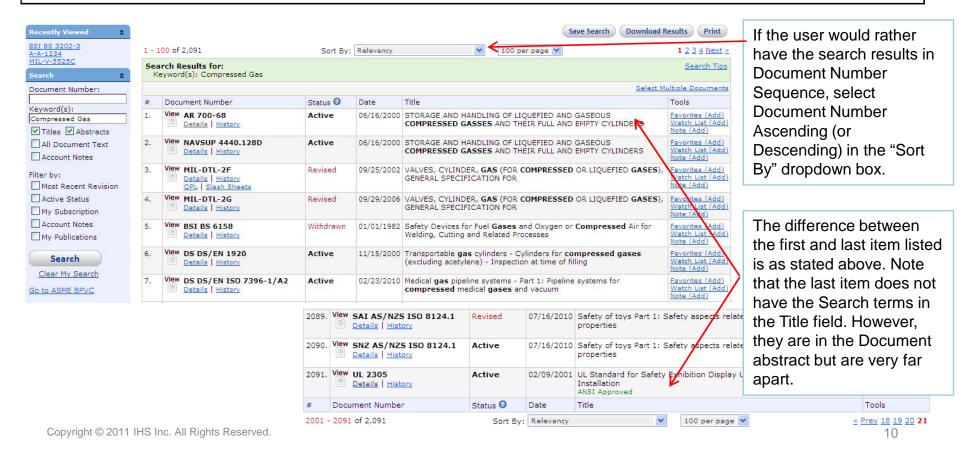


- •Relevancy is the process of placing the most relevant document at the top of the list, based on the user's search criteria and filter selections.
- Relevancy is calculated based on many variables, including:
 - The number of times the phrase or words appear in the selected criteria.
 - The closer the words are together (proximity).
 - Whether the search terms are an exact phrase.
 - And more.

Searching Search Results Relevancy Ranking



- A search for Compressed Gas (without quotes) with Titles and Abstracts selected.
- Results for Compressed Gas as well as results for Compressed Gasses (Lemmatization).





Personalization

Favorites

Frequently referenced documents

Watch Lists

Monitoring for change

Customization Tools

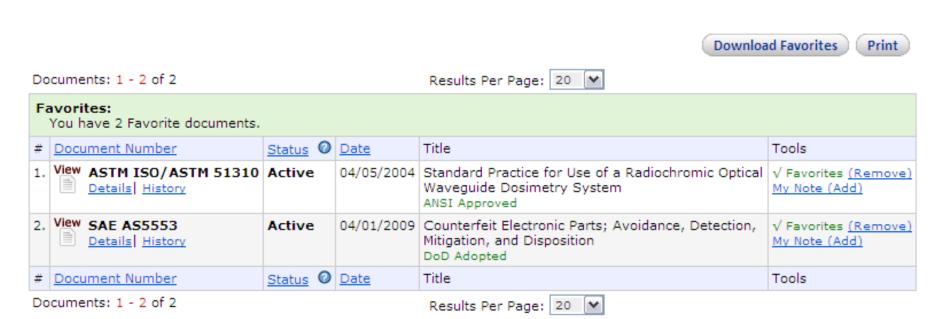
- Company logos and user messaging
- Multi-Language Interface
- Equivalencies
 - Equivalent documents as defined by ISO
 - Identical To, Equivalent to, Not Equivalent To, Modifies, Modified As

Personalization

Favorites



- Favorites are documents you frequently reference.
- •This is a quick list of documents for your own personal use.
- You can select to have alerts for the documents on your favorites list.



Personalization Creating Favorites



 Favorites can be created when viewing search results or Document Details, by simply clicking on the "Favorites (Add)" link.



 A list of all of your Favorites can be retrieved at any time by clicking on the Favorites tab at the top of the screen.



Personalization Watch Lists



- Similar to a Favorite, a Watch list allows to you to quickly access the documents you frequently use.
- However, it has additional features, such as:
 - The ability to name your list (e.g., by project, product, or compliance program) and have multiple named lists.
 - Documents can be frozen at a specific version or your list can be maintained at the current version.
 - List access can be private (for select individuals viewing only) or viewable by all personnel at your company.
 - List administration can be private (for select individuals viewing only) or viewable by all personnel at your company.
 - Viewing and editing rights can be issued to others in your group, department, etc.
 - Alerts can be enabled for a select group of individuals or the entire group of individuals associated with the list.

Personalization

Creating Watch Lists (Quick list creation)

Create New Watch List



In ISE 5 it will only take one page to update all the options necessary for creating a Watch List.

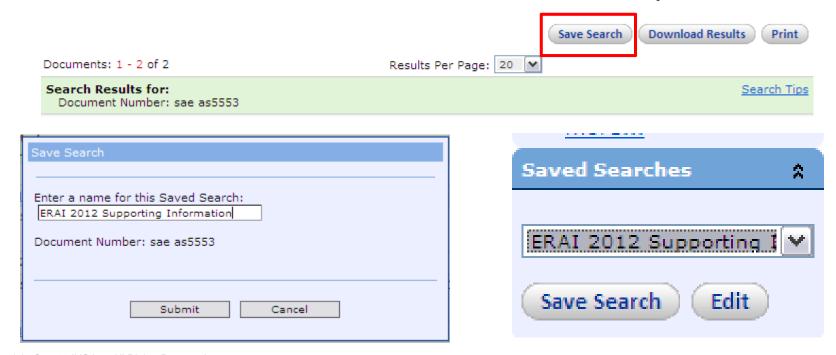
In previous versions of Standards Expert you had to click through four pages to select the options needed to create a Watch List.

New List Nar	ne
Enter List Name	
List Sharing	
List Modification	: O Allow all registered users
	Allow only selected users
	William Brundage <u>Choose Users</u>
List Viewing:	Allow all registered users
	Allow only selected users
List Alert Se	ttings
Email Alerts:	Only your Email address is set, by default, to receive email alerts when document changes occur.
	bill.brundage@ihs.com <u>Edit/Add Email Addresses</u>
	Create Cancel

Personalization Saved Searches



- Saved searches recreate potentially complex queries.
- They differ from Favorites as they return all documents matching the criteria, each time they are run. Favorites reference a specific document.
- Can be recalled and executed from the search panel.



Copyright © 2011 IHS Inc. All Rights Reserved.

Personalization *Automatic Monitoring*



- •Automated alerts when content is updated:
 - Help keep users in compliance with regulations.
 - Can be used to initiate internal workflows.
 - Inform individuals or groups that their attention may be required.
- •IHS updates the ISE collection every 20 minutes.
- Alerts are associated to the following features:
 - Favorites
 - Watch Lists

Personalization *Automatic Monitoring*



Alerts are delivered via e-mail.

From: ihsupdates

Sent: Saturday, August 20, 2011 3:23 AM

To: Noth, Steve

Subject: Document Alerts for Saturday, August 20, 2011

This notification is provided from IHS' Standards Expert concerning documents that have been set to have an alert request sent to you.

There have been changes to the following documents:

Alert From Watch List: Crane1

Document Number: ASTM -- ASTM D4057

Publication Date: 2006.10.01

Title: Standard Practice for Manual Sampling of

Petroleum and Petroleum Products

Status: Active

NOTE: DO NOT RESPOND TO THE ABOVE EMAIL ADDRESS.

If you need assistance please contact our

Customer Support Department at

<u>custsvc@ihs.com</u> or refer to the 'Training &

Support' section within Standards Expert.

From: ihsupdates

Sent: Thursday, August 04, 2011 1:37 AM

To: Noth, Steve

Subject: Document Alerts for Thursday, August 04, 2011

This notification is provided from IHS' Standards Expert concerning documents that have been set to have an alert request sent to you.

There have been changes to the following documents:

Alert From: Favorites

Document Number: ICC -- ICC IFC Publication Date: 2009.01.01 Title: International Fire Code

Status: Revised

NOTE: DO NOT RESPOND TO THE ABOVE EMAIL ADDRESS.

If you need assistance please contact our

Customer Support Department at

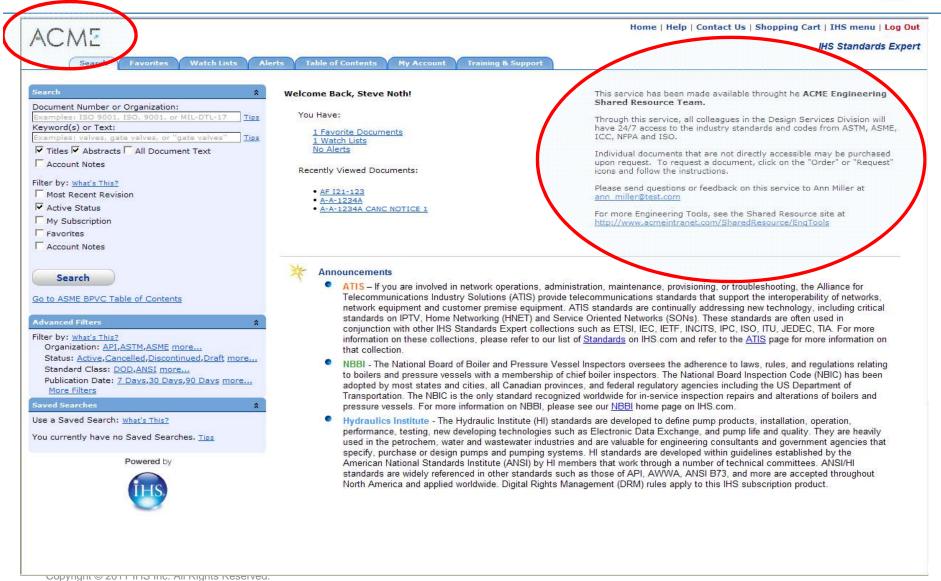
custsvc@ihs.com or refer to the 'Training &

Support' section within Standards Expert.

ΙО

Personalization Customization Tools

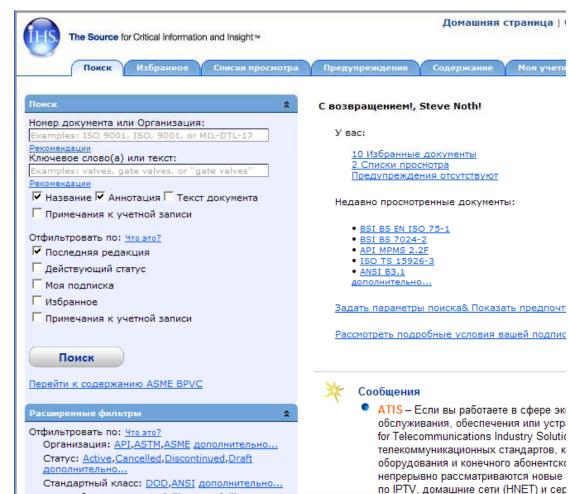




Personalization *Multi-Language Interface*



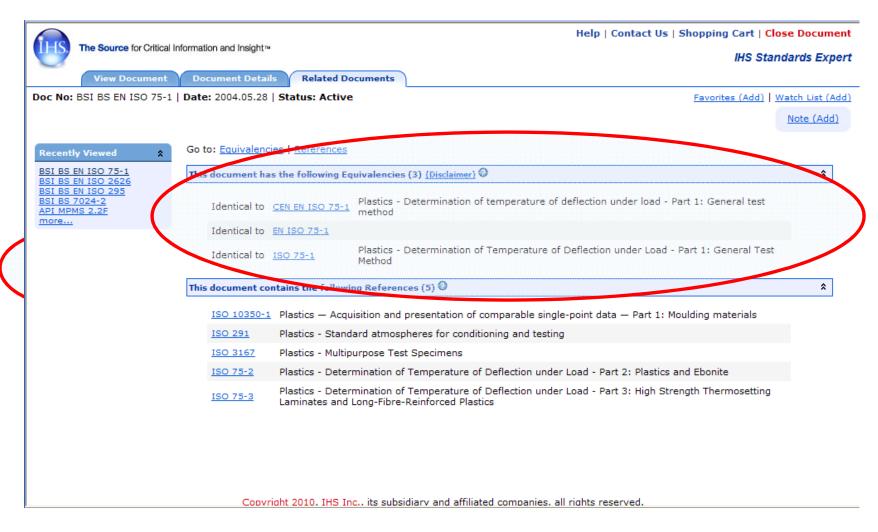
- English
- French
- German
- Italian
- Spanish (European)
- Spanish (Latin American)
- Portuguese (Latin American)
- Russian
- Japanese
- Korean
- Chinese (Mandarin)
- Chinese (Simplified)



Personalization

Equivalencies







Document Management

Related Documents

References to related content

My Publications

Access to internal documentation

Account Notes

Shared user notes on standards

Related Documents

Additional Qualification Requirements





Related Documents



Cross-references to related documents

document contains the fo	ollowing References (48) 🕜	
ASTM B170	Standard Specification for Oxygen-Free Electrolytic Copper—Refinery Shapes	
ASTM B487	Standard Test Method for Measurement of Metal and Oxide Coating Thickness by Microscopical Examination of Cross Section	
ASTM B567 REV A	Standard Test Method for Measurement of Coating Thickness by the Beta Backscatter Method	
ASTM B568	Standard Test Method for Measurement of Coating Thickness by X-Ray Spectrometry	
ASTM D2863	Standard Test Method for Measuring the Minimum Oxygen Concentration to Support Candle-Like Combustion of Plastics (Oxygen Index)	
<u>ASTM F1192</u>	Standard Guide for the Measurement of Single Event Phenomena (SEP) Induced by Heavy Ion Irradiation of Semiconductor Devices	
document is Kererencea	By the following documents (85) 🕖	
ASTM F1263	Standard Guide for Analysis of Overtest Data in Radiation Testing of Electronic Parts	
BSI DD IEC/TS 62396-1	Process management for avionics Atmospheric radiation effects Part 1: Accommodation of atmospheric radiation effects via single event effects within avionics electronic equipment	
BSI PD IEC/PAS 62239	PRE-STANDARD - Electronic Component Management Plans	
JEDEC JESD47H	Stress-Test-Driven-Qualification of Integrated Circuits	
SAE AS5553	Counterfeit Electronic Parts; Avoidance, Detection, Mitigation, and Disposition	



Internal customer information is linked to specific standards (and versions), allowing users to access all required internal and external information from one application, reducing the time spent locating related information and ensuring that users are referencing the correct information.

- Tools for customers to add their own document information (e.g., document numbers, titles) to the IHS Standards Expert Index.
- Document information data linked to the document maintained on the customer's secured environments using a URL.
- Ability to search for their content using all of IHS Standards Expert's searching and filtering functions.

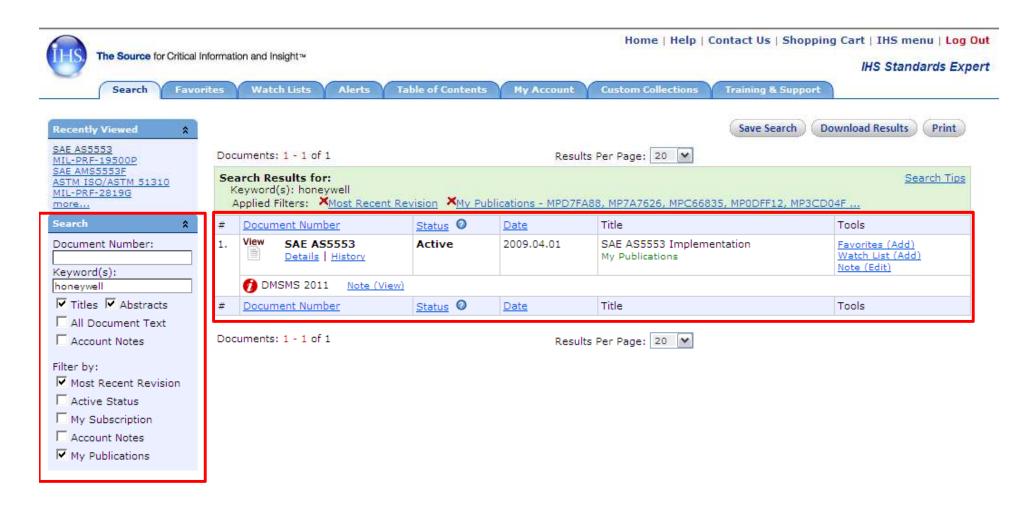




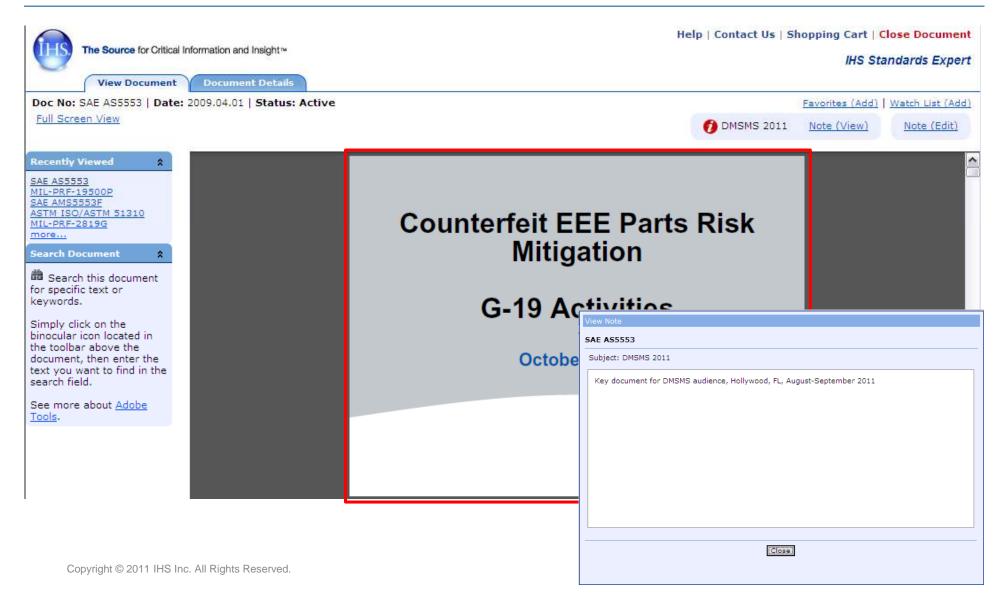
Add a New D	Occument Import list of Publications Revi	iew Field Definitions	
Document Number	i Publication Date < M/d/yyyy>	15	
Status	Active ▼ i Language English	•	
Title			i
Document URL	If used, begin with http:// or https://		i
Group Code	PLC Trainers (Default) ▼ i Page Count □		
Organization	Organization Name		
Alternate Designations	(i) Keywords		
Abstract	separate with commas separate with commas		
	Subr	mit Cancel	

Copyright © 201 Hins Inc. All Rights Reserved.



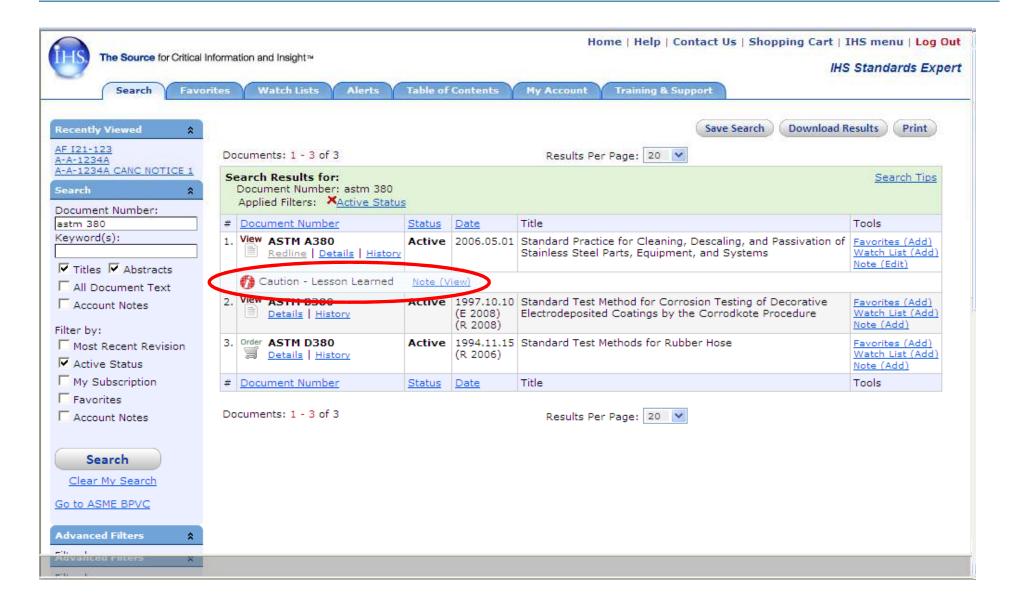






Document Management Account Notes







Questions?

Thank-you!