



Techstreet Enterprise administrator guide

This Techstreet Enterprise™ guide provides a brief overview of all the major administration features available on the platform. Learn how to add users, set up a custom field, and more.

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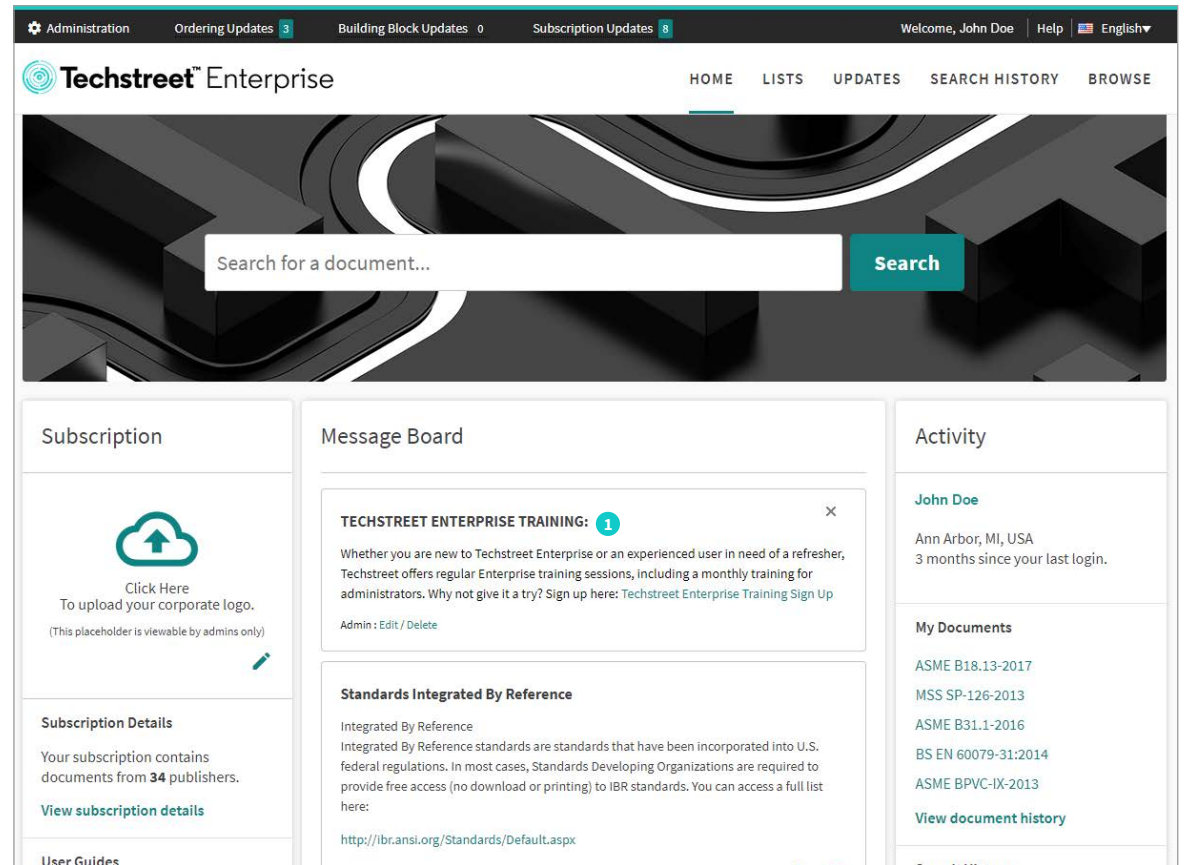
Subscription updates

Customer care

Administrator dashboard

As an administrator, you have significant control over your Enterprise subscription. When you log in, you will see a dashboard like this one.

Each column includes valuable information. At the top of the messages column, you can create a message that all your users will see ¹.



The screenshot shows the Techstreet Enterprise Administrator Dashboard. At the top, there is a navigation bar with the following items: Administration, Ordering Updates (3), Building Block Updates (0), Subscription Updates (8), Welcome, John Doe, Help, and English. Below the navigation bar is the Techstreet Enterprise logo and a search bar with the placeholder text "Search for a document..." and a "Search" button. The dashboard is divided into three main columns:

- Subscription:** Contains a "Click Here To upload your corporate logo." button with a cloud icon and a note "(This placeholder is viewable by admins only)". Below this is a "Subscription Details" section stating "Your subscription contains documents from 34 publishers." and a "View subscription details" link. At the bottom is a "User Guides" section.
- Message Board:** Features a "TECHSTREET ENTERPRISE TRAINING: 1" message with a close button. The message text reads: "Whether you are new to Techstreet Enterprise or an experienced user in need of a refresher, Techstreet offers regular Enterprise training sessions, including a monthly training for administrators. Why not give it a try? Sign up here: Techstreet Enterprise Training Sign Up" and includes "Admin : Edit / Delete" options. Below the message is a "Standards Integrated By Reference" section with a link to "http://ibr.ansi.org/Standards/Default.aspx".
- Activity:** Shows the user "John Doe" with location "Ann Arbor, MI, USA" and a note "3 months since your last login." Below this is a "My Documents" section listing "ASME B18.13-2017", "MSS SP-126-2013", "ASME B31.1-2016", "BS EN 60079-31:2014", and "ASME BPVC-IX-2013", with a "View document history" link.

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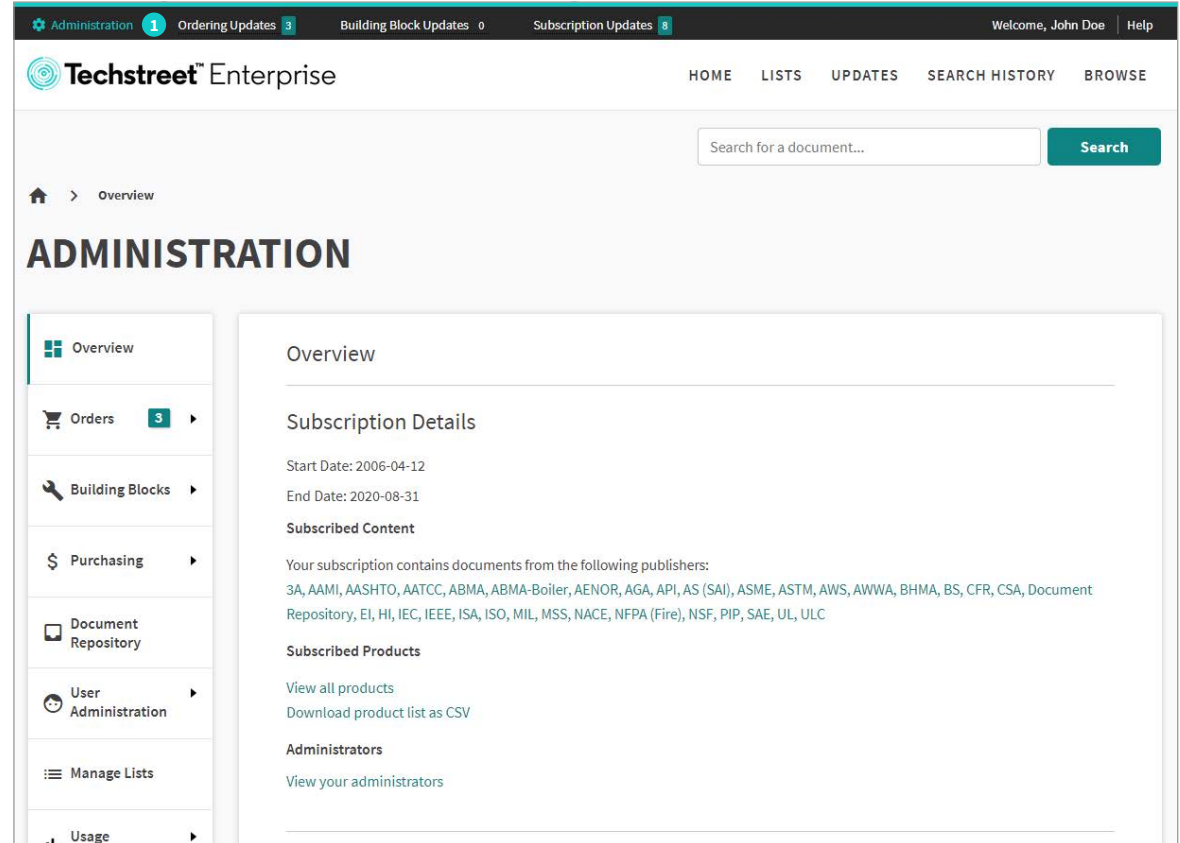
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Administrator overview

If you click on the Administration link **1** in the upper left corner of the screen, you will be taken to this administrator overview page, with administration navigation on the left. The navigation options you see will depend on your subscription and your personal administrator settings; your personal administrator settings also determine which navigation options you see in the top banner.

The overview screen provides details about your subscription – which publishers are included, when your subscription ends, and so on. You will also find a Building Blocks guide here.



The screenshot shows the Techstreet Enterprise Administrator Overview page. The top navigation bar includes links for Administration (1), Ordering Updates (3), Building Block Updates (0), and Subscription Updates (8), along with a user greeting 'Welcome, John Doe' and a 'Help' link. The main header features the Techstreet Enterprise logo and navigation links for HOME, LISTS, UPDATES, SEARCH HISTORY, and BROWSE. A search bar is present with the placeholder text 'Search for a document...' and a 'Search' button. The page title is 'ADMINISTRATION' and the breadcrumb is 'Overview'. The left sidebar contains navigation options: Overview, Orders (3), Building Blocks, Purchasing, Document Repository, User Administration, Manage Lists, and Usage. The main content area displays 'Subscription Details' with the following information: Start Date: 2006-04-12, End Date: 2020-08-31, and Subscribed Content: 'Your subscription contains documents from the following publishers: 3A, AAMI, AASHTO, AATCC, ABMA, ABMA-Boiler, AENOR, AGA, API, AS (SAI), ASME, ASTM, AWS, AWWA, BHMA, BS, CFR, CSA, Document Repository, EI, HI, IEC, IEEE, ISA, ISO, MIL, MSS, NACE, NFPA (Fire), NSF, PIP, SAE, UL, ULC'. Below this, there are links for 'Subscribed Products' (View all products, Download product list as CSV) and 'Administrators' (View your administrators).

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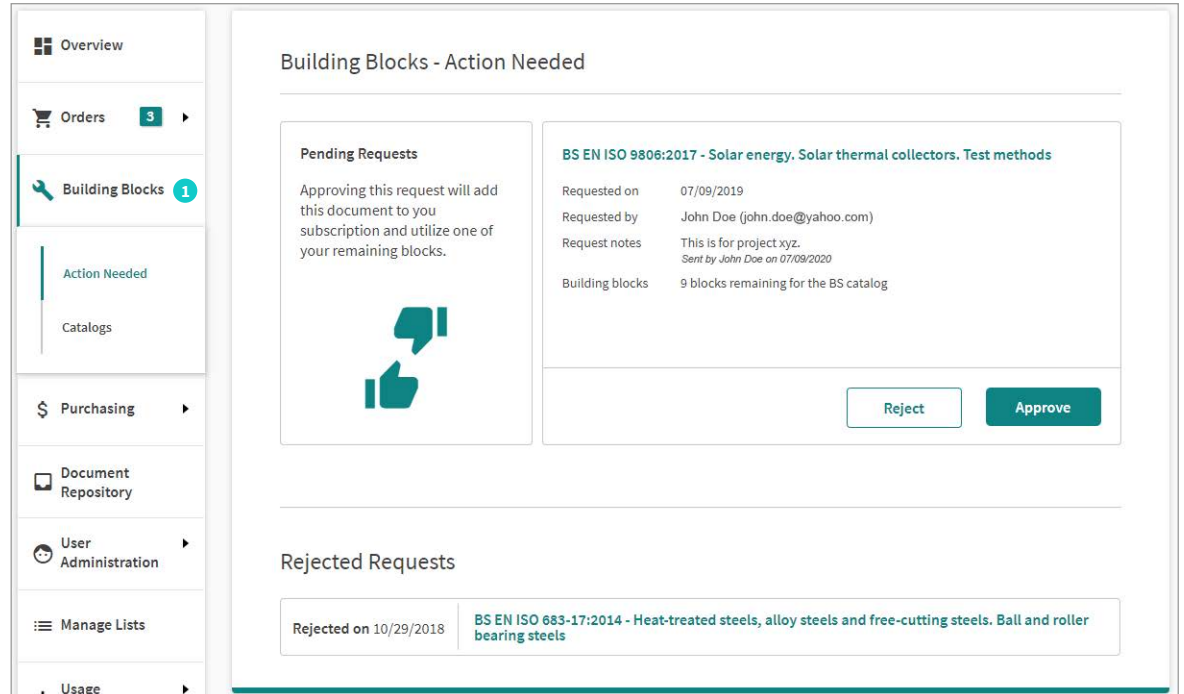
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Building Blocks

Building Blocks is an optional feature . You can purchase a set of Building Blocks from a publisher at the beginning of your subscription. You and your users can then add individual documents from that publisher over the course of your subscription term.


Administrators can add them automatically, but users must request that they be added. When a user makes a request, the administrator will get an email letting him know, and can then approve or reject the request using a form like the one below. See the Building Blocks guide for more information.



The screenshot shows a sidebar navigation menu on the left with the following items: Overview, Orders (3), Building Blocks (1), Action Needed, Catalogs, Purchasing, Document Repository, User Administration, Manage Lists, and Usage. The main content area is titled "Building Blocks - Action Needed" and is divided into two sections: "Pending Requests" and "Rejected Requests".

Pending Requests

Approving this request will add this document to your subscription and utilize one of your remaining blocks.



BS EN ISO 9806:2017 - Solar energy. Solar thermal collectors. Test methods

Requested on	07/09/2019
Requested by	John Doe (john.doe@yahoo.com)
Request notes	This is for project xyz. <i>Sent by John Doe on 07/09/2020</i>
Building blocks	9 blocks remaining for the BS catalog

Rejected Requests

Rejected on 10/29/2018 **BS EN ISO 683-17:2014 - Heat-treated steels, alloy steels and free-cutting steels. Ball and roller bearing steels**

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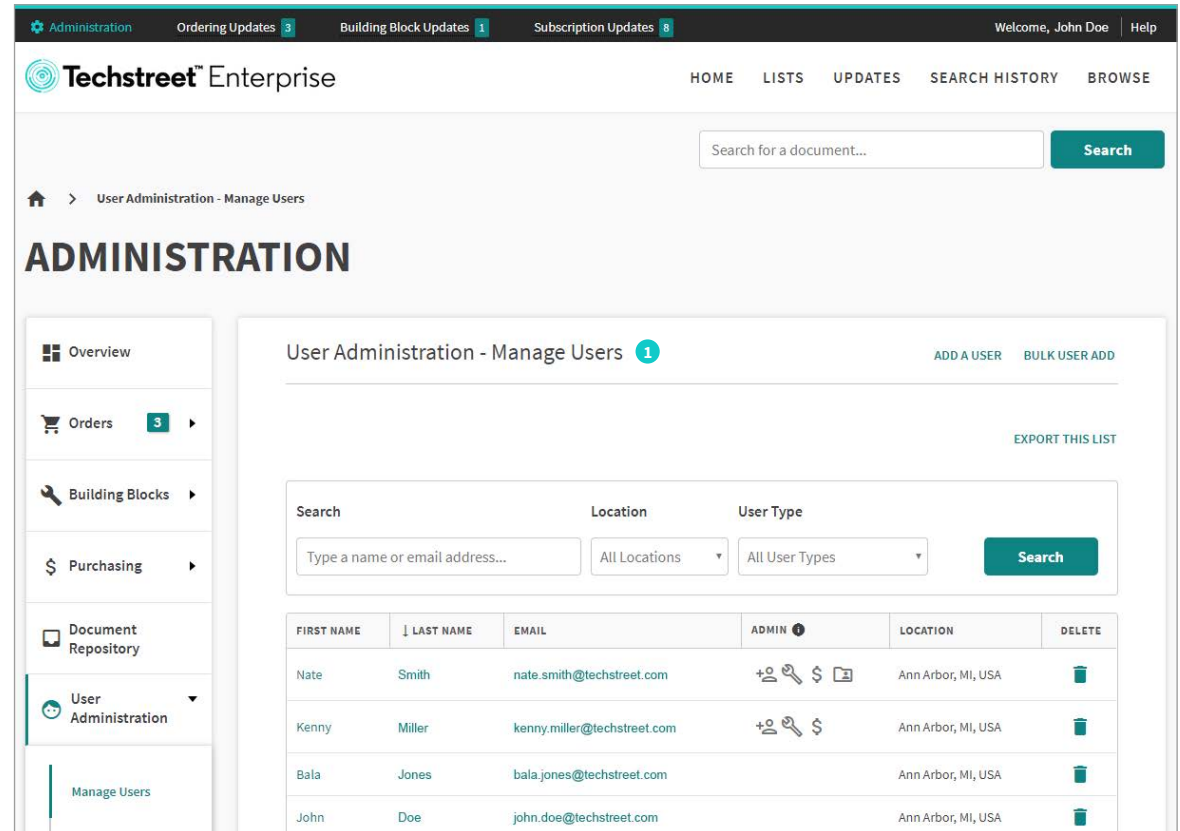
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Manage users

Under manage users (within user administration), you can add and remove users from your subscription ¹.

You can add or delete users one at a time, or you can upload a spreadsheet of users and we will bulk load them for you. Each time a user is added, that user gets an email with a link to set his password. Please be careful when you delete users – their lists will be deleted, too.



The screenshot shows the 'User Administration - Manage Users' page in the Techstreet Enterprise admin interface. The page has a dark header with navigation links and a search bar. The main content area features a sidebar with navigation options and a central panel with a search filter and a table of users.

FIRST NAME	LAST NAME	EMAIL	ADMIN	LOCATION	DELETE
Nate	Smith	nate.smith@techstreet.com	+ 👤 \$ 📄	Ann Arbor, MI, USA	🗑️
Kenny	Miller	kenny.miller@techstreet.com	+ 👤 \$	Ann Arbor, MI, USA	🗑️
Bala	Jones	bala.jones@techstreet.com		Ann Arbor, MI, USA	🗑️
John	Doe	john.doe@techstreet.com		Ann Arbor, MI, USA	🗑️

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Manage seats

There is also a seat management feature here, too, for those publishers that require you to purchase seats for simultaneous access.

If you click on manage seats under user administration, you will see a screen like the one above. It will show which seats are occupied, and gives you the ability to release seats when needed 1. A seat is occupied when a user has a document open from that publisher. If all seats are in use, the user will see a message asking them to contact their administrator for help.

Manage Users
Manage Seats

Manage Lists
Usage Reporting
Subscription Settings

BHMA	0/1	N/A	Ann Arbor, MI, USA Tallahassee, FL, USA Taipei, Taiwan Tegucigalpa, Honduras Thimphu, Bhutan Timbuktu, Mali Tirana, Albania Tokyo, Japan Toledo, Spain Toronto, ON, Canada
▼ BS	N/A	1/1000	All

EMAIL	USER	DOCUMENTS DOWNLOADED	RELEASE SEAT
(You)	John Doe	BS EN ISO 13631:2002 on 2016-08-24 14:30:38 -0500 BS EN 60079-31:2014 on 2015-02-20 09:58:31 -0600 BS EN 60730-2-5:2015 on 2017-04-19 09:49:31 -0500 BS PD 5500:2015 on 2015-06-04 14:42:00 -0500 BS ISO 16468:2015 on 2016-05-05 09:23:19 -0500 BS EN ISO 11111-2:2005+A2:2016 on 2017-07-13 13:51:33 -0500 BS ISO/IEC 30182:2017 on 2017-10-11 12:46:46 -0500 BS ISO 683-5:2017 on 2017-11-30 13:41:39 -0600	Release 1

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Usage reports

Usage reports ¹ are a powerful way for you to monitor which standards are being used and who they're being used by in your organization. You can run reports by user, document, publisher, and location. You can download them as a csv file or view them within the browser.

- Overview
- Orders 3
- Building Blocks
- Purchasing
- Document Repository
- User Administration
- Manage Lists
- Usage Reporting 1**
- Dashboard
- Legacy Reporting
- Subscription Settings

Usage Reporting - Dashboard

Usage data below is from Jun 10, 2019 to today.

Usage by User

User	Usage
Mike Smith	2
John Doe	1

Last 30 days
View Details

Usage by Document

Document	Usage
AWWA B306-15	2
CSA ANSI HCV 4.8-2012 / CSA 12.8-2002	1

Last 30 days
View Details

Usage by Location

Location	Usage
Ann Arbor, MI, USA	3

Last 30 days
View Details

Usage by Publisher

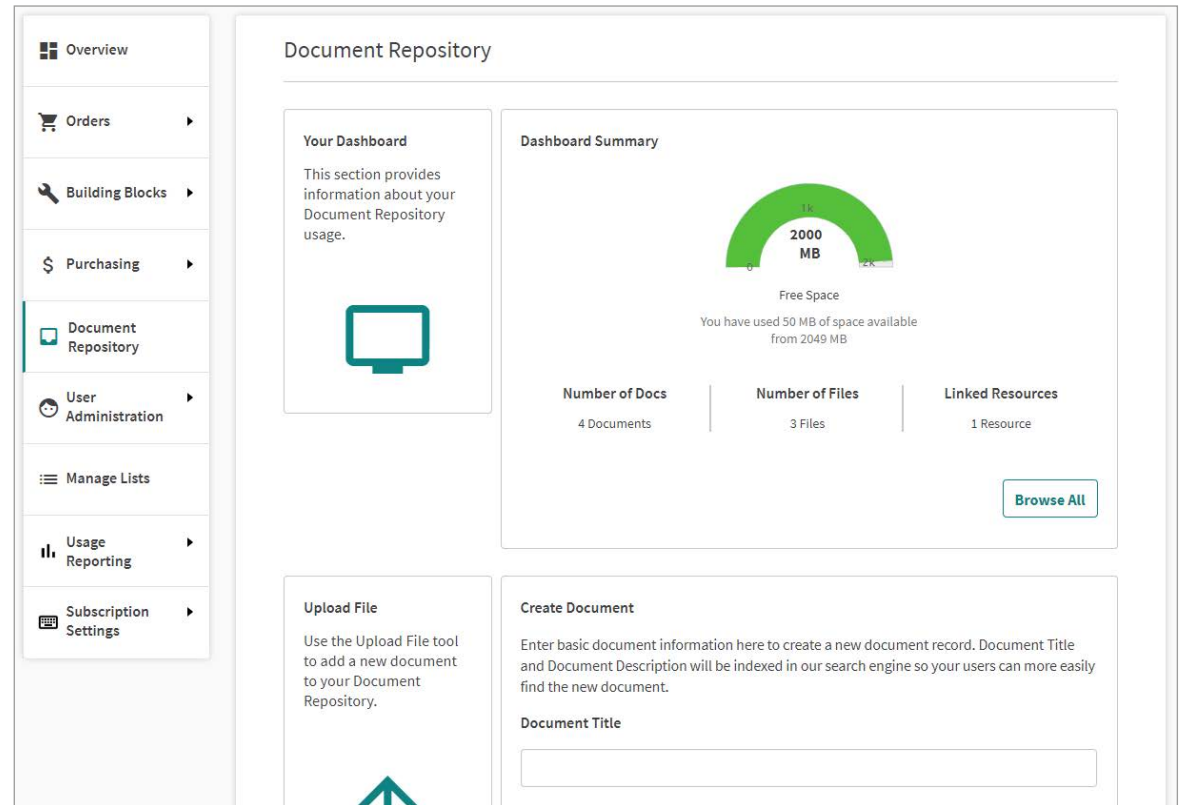
Publisher	Usage
AWWA	2
CSA	1

Last 30 days
View Details

7

Document repository

For a fee, we can set up a document repository for you. Here you can store standards related documents – internal standards, gap analyses, etc. – and make them available to all your Techstreet users. Contact your Techstreet Sales Consultant for more information.



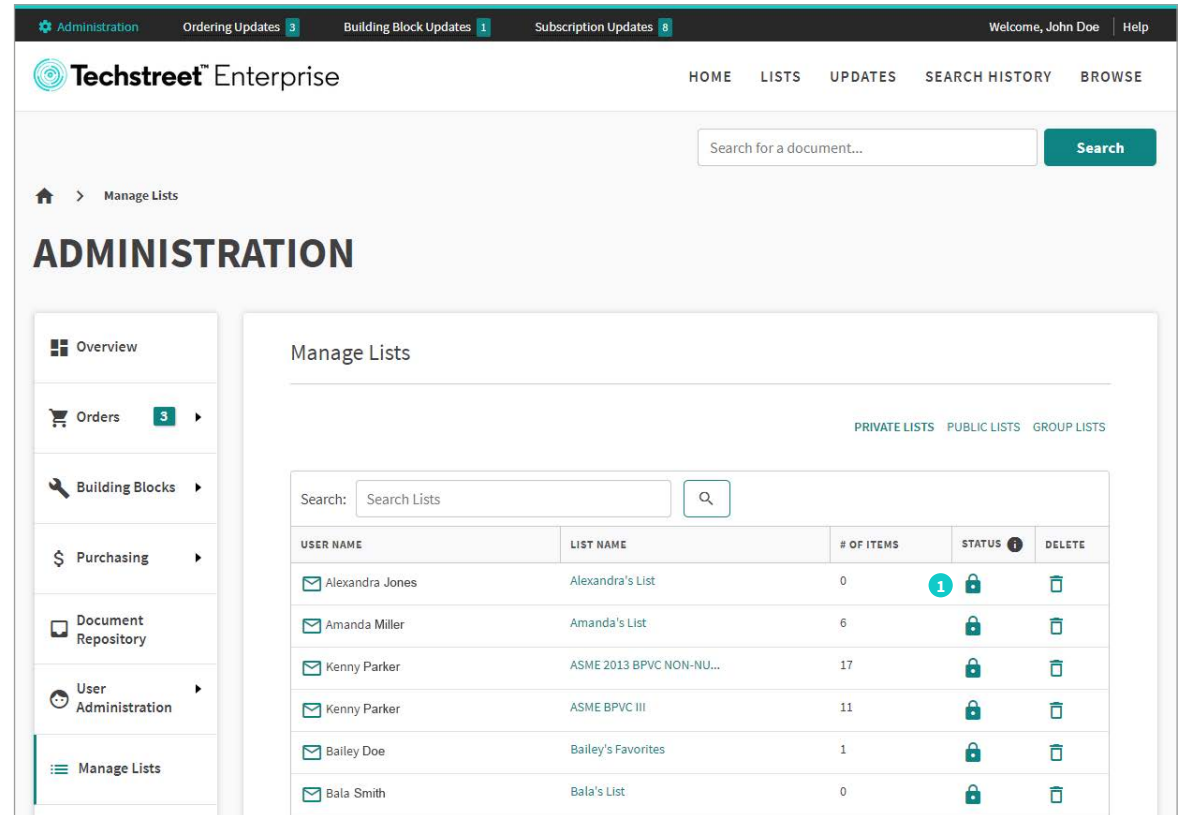
The screenshot shows the 'Document Repository' dashboard. On the left is a navigation sidebar with the following items: Overview, Orders, Building Blocks, Purchasing, Document Repository (highlighted), User Administration, Manage Lists, Usage Reporting, and Subscription Settings. The main content area is titled 'Document Repository' and contains several sections:

- Your Dashboard:** A placeholder for information about document repository usage, represented by a monitor icon.
- Dashboard Summary:** A section with a green gauge chart showing '2000 MB' usage. Below the gauge, it states 'Free Space' and 'You have used 50 MB of space available from 2049 MB'. Below this are three summary cards: 'Number of Docs' (4 Documents), 'Number of Files' (3 Files), and 'Linked Resources' (1 Resource). A 'Browse All' button is located at the bottom right of this section.
- Upload File:** A section with an upward-pointing arrow icon and text: 'Use the Upload File tool to add a new document to your Document Repository.'
- Create Document:** A section with text: 'Enter basic document information here to create a new document record. Document Title and Document Description will be indexed in our search engine so your users can more easily find the new document.' Below this is a 'Document Title' label and an empty text input field.

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Manage lists

The manage lists feature enables you to review and delete lists from any user in your subscription. Lists are a great way for users to stay on top of the standards important to their work. Each time a document on a list is updated, the user will get an email letting him know. Lists can be public, private, or group **1**. You can navigate through each type using the available links.



The screenshot shows the 'Manage Lists' page in the Techstreet Enterprise administration interface. The page has a dark header with navigation links for Administration, Ordering Updates (3), Building Block Updates (1), and Subscription Updates (8). The user is logged in as John Doe. The main navigation includes Home, Lists, Updates, Search History, and Browse. A search bar is present at the top right.

The 'Manage Lists' section is active, showing a sidebar with navigation options: Overview, Orders (3), Building Blocks, Purchasing, Document Repository, User Administration, and Manage Lists. The main content area displays a table of lists with the following data:

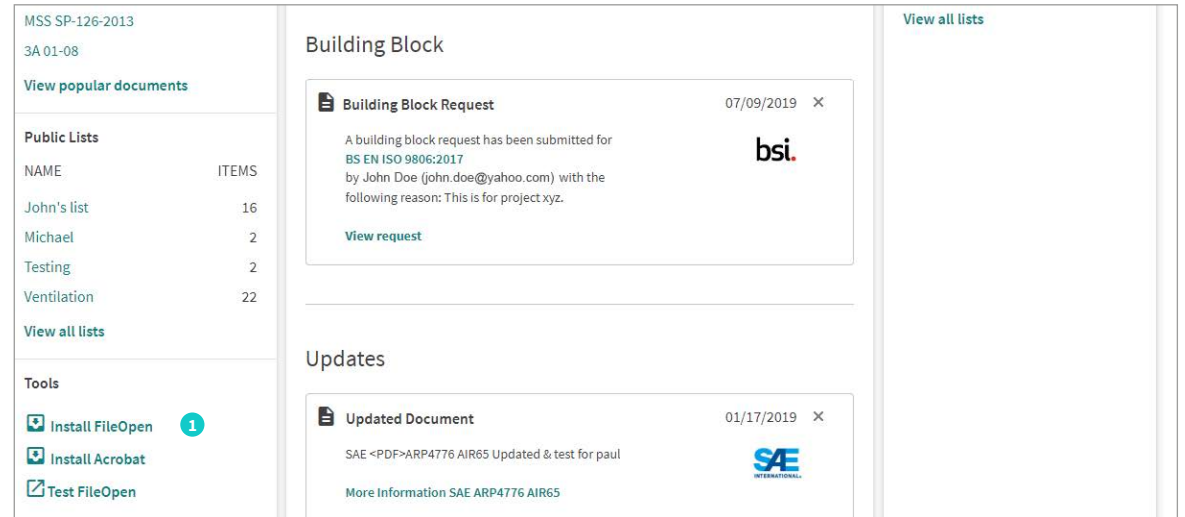
USER NAME	LIST NAME	# OF ITEMS	STATUS 1	DELETE
Alexandra Jones	Alexandra's List	0	🔒	🗑️
Amanda Miller	Amanda's List	6	🔒	🗑️
Kenny Parker	ASME 2013 BPVC NON-NU...	17	🔒	🗑️
Kenny Parker	ASME BPVC III	11	🔒	🗑️
Bailey Doe	Bailey's Favorites	1	🔒	🗑️
Bala Smith	Bala's List	0	🔒	🗑️

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FileOpen

Some standards publishers require that Digital Rights Management (DRM) software be installed with their documents. The industry standard is FileOpen.

FileOpen associates the standard with your computer, so it's only accessible from there. You can download and install FileOpen from your dashboard page ¹. At the bottom of the lefthand column is an "install FileOpen" link. Click that link to start the installation process.



The screenshot displays a dashboard interface with several sections:

- Top Left:** Document identifiers "MSS SP-126-2013" and "3A 01-08", with a link to "View popular documents".
- Public Lists:** A table listing public lists and their item counts:

NAME	ITEMS
John's list	16
Michael	2
Testing	2
Ventilation	22
- Tools:** A list of installation options: "Install FileOpen" (with a red '1' notification), "Install Acrobat", and "Test FileOpen".
- Building Block:** A notification titled "Building Block Request" dated 07/09/2019, featuring the bsi logo. The text states: "A building block request has been submitted for BS EN ISO 9806:2017 by John Doe (john.doe@yahoo.com) with the following reason: This is for project xyz." A "View request" link is provided.
- Updates:** A notification titled "Updated Document" dated 01/17/2019, featuring the SAE logo. The text states: "SAE <PDF>ARP4776 AIR65 Updated & test for paul". A "More Information SAE ARP4776 AIR65" link is provided.
- Right Side:** A vertical sidebar with a "View all lists" link.

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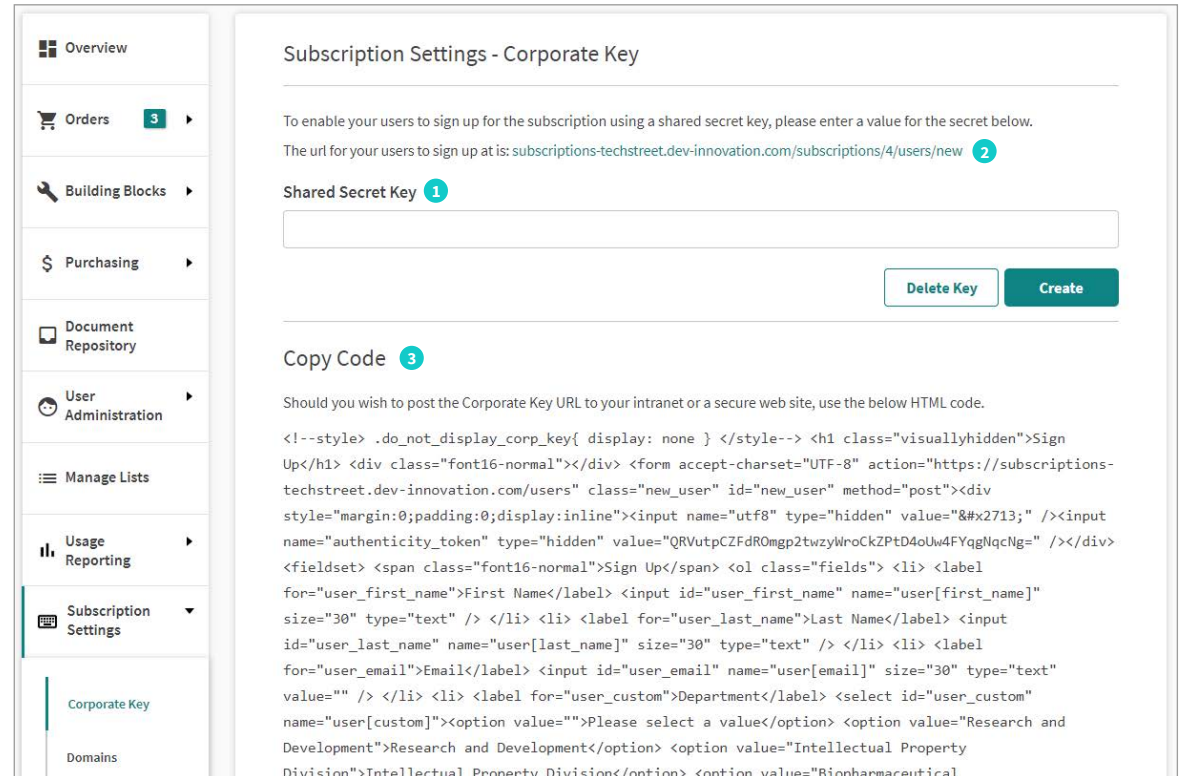
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Under subscription settings, you can use the corporate key feature to enable users to create their own accounts. Enter a value for the shared secret key **1**, and you can send a sign up link **2** to users or embed a sign up form **3** in your intranet.



Subscription Settings - Corporate Key

To enable your users to sign up for the subscription using a shared secret key, please enter a value for the secret below.

The url for your users to sign up at is: subscriptions-techstreet.dev-innovation.com/subscriptions/4/users/new **2**

Shared Secret Key **1**

[Delete Key](#) [Create](#)

Copy Code **3**

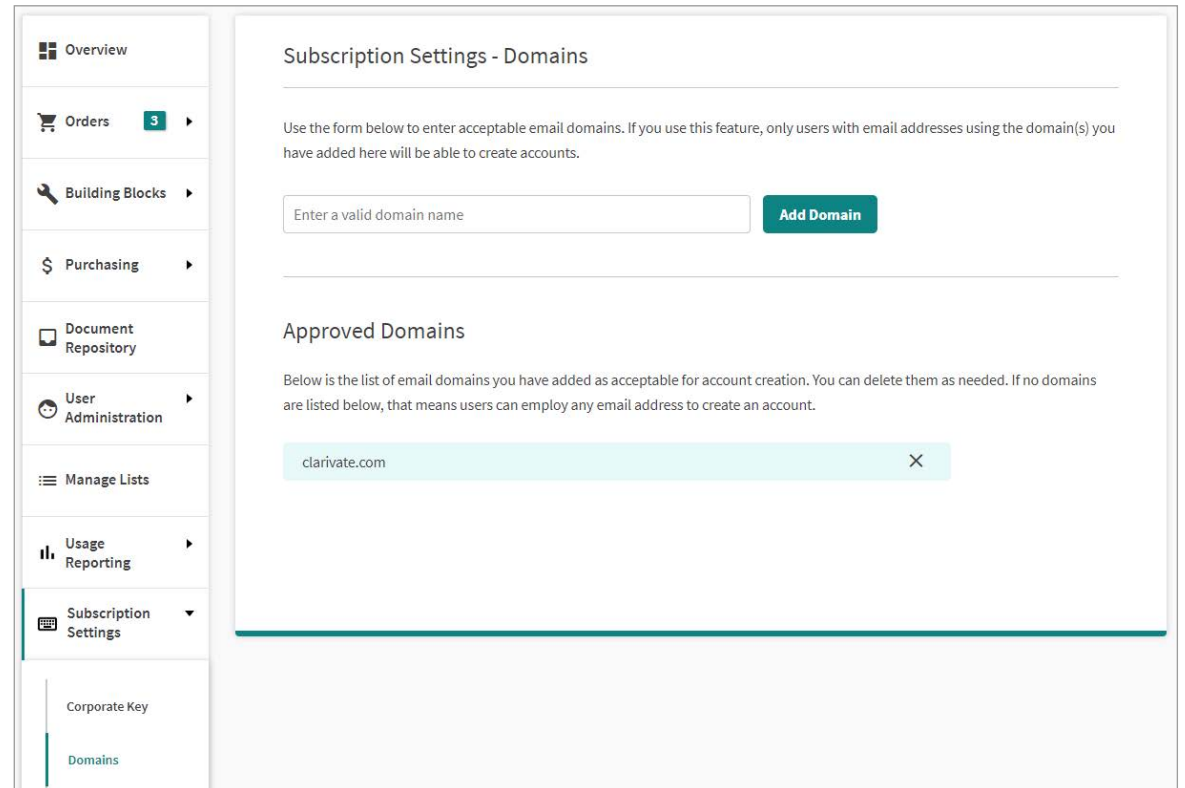
Should you wish to post the Corporate Key URL to your intranet or a secure web site, use the below HTML code.

```
<!--style> .do_not_display_corp_key{ display: none } </style--> <h1 class="visuallyhidden">Sign Up</h1> <div class="font16-normal"></div> <form accept-charset="UTF-8" action="https://subscriptions-techstreet.dev-innovation.com/users" class="new_user" id="new_user" method="post"><div style="margin:0;padding:0;display:inline"><input name="utf8" type="hidden" value="&#x2713;" /><input name="authenticity_token" type="hidden" value="QRVutpCFdR0mgp2twzyWroCkZPtD4oUw4FYqgNqCNg=" /></div> <fieldset> <span class="font16-normal">Sign Up</span> <ol class="fields"> <li> <label for="user_first_name">First Name</label> <input id="user_first_name" name="user[first_name]" size="30" type="text" /> </li> <li> <label for="user_last_name">Last Name</label> <input id="user_last_name" name="user[last_name]" size="30" type="text" /> </li> <li> <label for="user_email">Email</label> <input id="user_email" name="user[email]" size="30" type="text" value="" /> </li> <li> <label for="user_custom">Department</label> <select id="user_custom" name="user[custom]"><option value="">Please select a value</option> <option value="Research and Development">Research and Development</option> <option value="Intellectual Property Division">Intellectual Property Division</option> <option value="Biopharmaceutical
```

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Approved email domains

Under subscription settings, you can set up domains that users can use to create an account. Enter your company domain name(s) here if you want to make sure users create accounts with their work email account.



Subscription Settings - Domains

Use the form below to enter acceptable email domains. If you use this feature, only users with email addresses using the domain(s) you have added here will be able to create accounts.

Enter a valid domain name

Approved Domains

Below is the list of email domains you have added as acceptable for account creation. You can delete them as needed. If no domains are listed below, that means users can employ any email address to create an account.

clarivate.com

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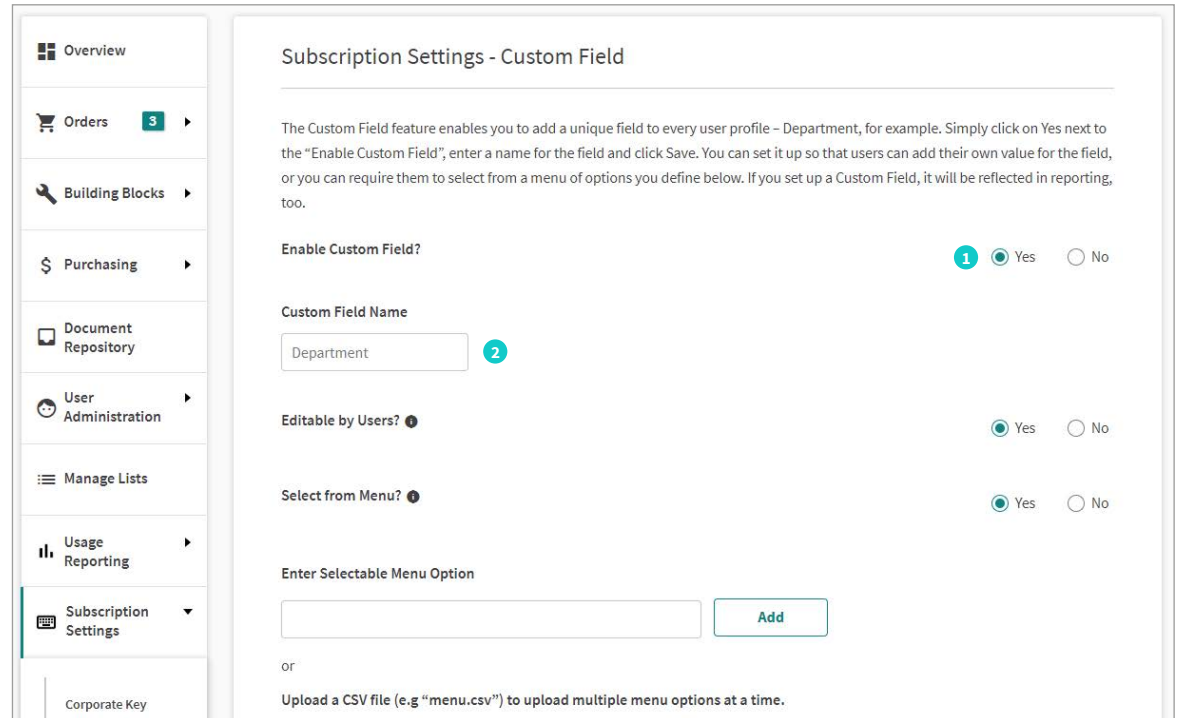
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Under subscription settings, you can add a custom field to user profiles using the custom field feature. Many customers use this to store department or cost center details. Change the enable custom field value to yes **1** and enter a custom field name **2** to enable this feature. You can also enter a set of values users can select from via a pull down menu.



Subscription Settings - Custom Field

The Custom Field feature enables you to add a unique field to every user profile – Department, for example. Simply click on Yes next to the “Enable Custom Field”, enter a name for the field and click Save. You can set it up so that users can add their own value for the field, or you can require them to select from a menu of options you define below. If you set up a Custom Field, it will be reflected in reporting, too.

Enable Custom Field? **1** Yes No

Custom Field Name
 2

Editable by Users? **1** Yes No

Select from Menu? **1** Yes No

Enter Selectable Menu Option

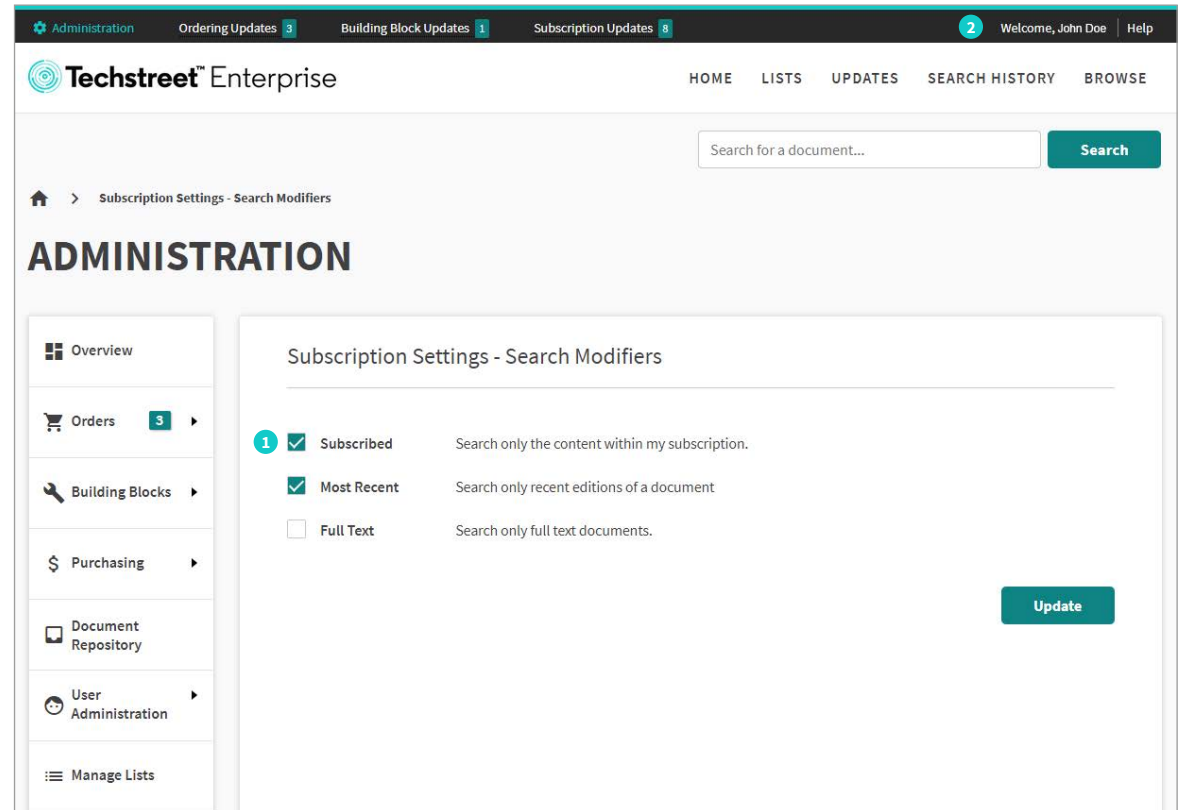
or

Upload a CSV file (e.g “menu.csv”) to upload multiple menu options at a time.

Search modifiers

You can set the search modifier defaults for the entire subscription on the search modifiers page, which is accessible under subscription settings. Subscribed and Most Recent are checked by default, but full text is not ¹.

You can change the defaults here, and it will affect the entire subscription. However, users can override the subscription settings with their own search modifiers setting in their profile ².



The screenshot shows the Techstreet Enterprise Administration interface. The top navigation bar includes 'Administration', 'Ordering Updates 3', 'Building Block Updates 1', 'Subscription Updates 8', and a user profile 'Welcome, John Doe | Help'. The main header features the Techstreet logo and navigation links: 'HOME', 'LISTS', 'UPDATES', 'SEARCH HISTORY', and 'BROWSE'. A search bar is present with the placeholder text 'Search for a document...' and a 'Search' button. The breadcrumb trail indicates the current location: 'Subscription Settings - Search Modifiers'. The main content area is titled 'ADMINISTRATION' and contains a sidebar with navigation options: 'Overview', 'Orders 3', 'Building Blocks', 'Purchasing', 'Document Repository', 'User Administration', and 'Manage Lists'. The main panel is titled 'Subscription Settings - Search Modifiers' and contains three settings:

- Subscribed** (marked with a red '1') - Search only the content within my subscription.
- Most Recent** - Search only recent editions of a document.
- Full Text** - Search only full text documents.

An 'Update' button is located at the bottom right of the settings panel.

Subscription updates

With subscription updates, you can set up an alert ¹ so you get an email each time a new or revised document is added to your subscription. As an administrator, this is an important way to keep on top of all the standards available through your organization's subscription.

Subscription Updates

Subscription Updates is a convenient way to stay informed about new or changed documents within your subscription.

NOTE: Update reporting data is only available beginning June 1, 2012.

Create New Report

Reports allow you view document changes, additions, or both, and may either be viewed online or downloaded as a CSV file to your desktop.

Select report type (new, changed, or both), specify a single publisher or all publishers, and the time-frame covered by the report (last 24 hours, last week, or last month), then click Run Report.

Show me documents from since

Create New Alerts ¹


Alerts allow you to receive periodic notifications of changes or additions to your subscription.

Select the alert frequency (daily, weekly, or monthly), alert type (new, changed, or both), and publisher (all publishers or a specific publisher), then click Create Alert.

Techstreet will alert you automatically according to the specified criteria.

Alert me about documents from

Your Alerts

DESCRIPTION	NEXT ALERT	# OF UPDATES	↓ LAST RUN	DELETE
Updates since last week - (Edit)	2019-07-16 (from 2018-11-27 - 2018-12-04)	10	2018-11-27	

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If you have any questions, we recommend checking our help center first: [subscriptions.techstreet.com/help_center](https://techstreet.com/help_center)

If you can't find the answer there, contact us:

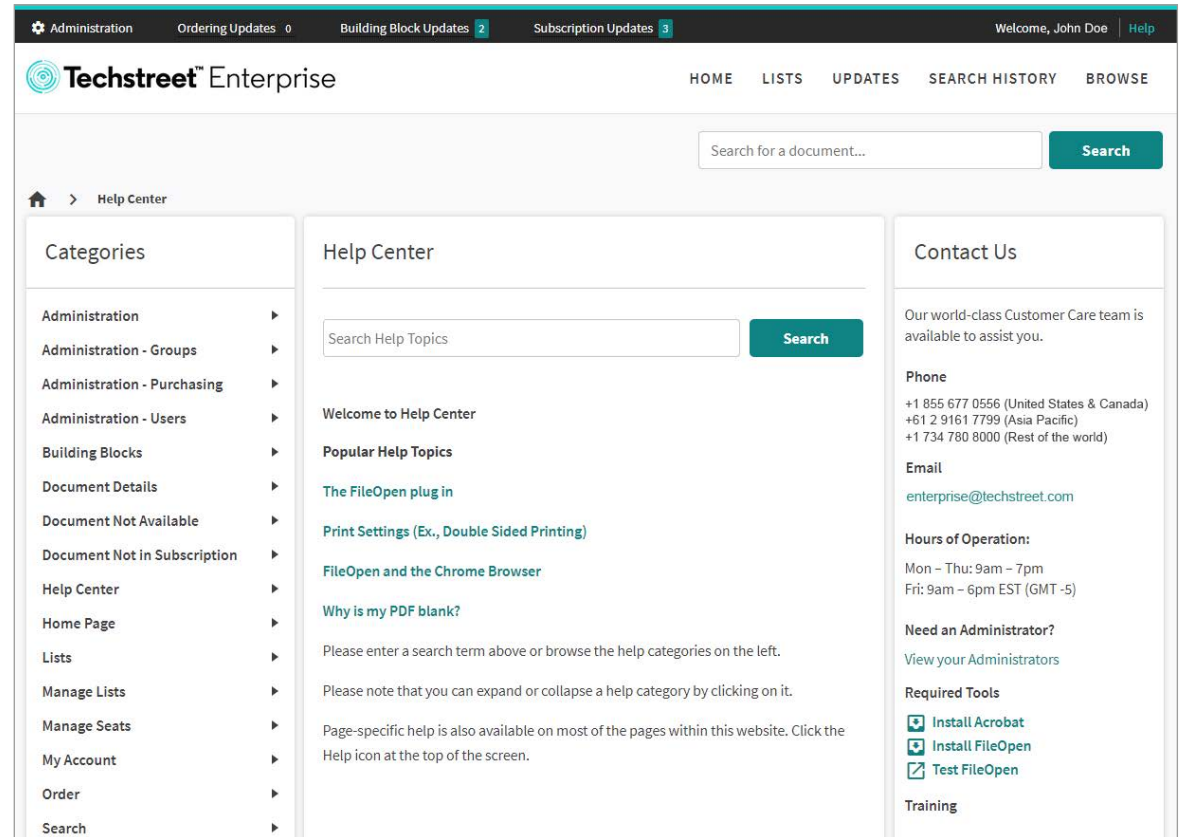
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(Rest of the world)

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The screenshot shows the Techstreet Enterprise Help Center interface. At the top, there is a navigation bar with links for Administration, Ordering Updates (0), Building Block Updates (2), and Subscription Updates (3). The user is logged in as 'Welcome, John Doe'. The main header includes the Techstreet Enterprise logo and navigation links for HOME, LISTS, UPDATES, SEARCH HISTORY, and BROWSE. A search bar is present with the placeholder text 'Search for a document...' and a 'Search' button. The main content area is titled 'Help Center' and features a 'Categories' sidebar on the left with a list of topics such as Administration, Building Blocks, and Document Details. The central 'Help Center' section contains a search bar for 'Search Help Topics', a 'Search' button, and a list of popular help topics including 'The FileOpen plug in', 'Print Settings', and 'FileOpen and the Chrome Browser'. A 'Contact Us' sidebar on the right provides contact information for the Customer Care team, including phone numbers for different regions, an email address (enterprise@techstreet.com), and hours of operation (Mon - Thu: 9am - 7pm, Fri: 9am - 6pm EST). It also lists required tools like Acrobat, FileOpen, and Test FileOpen, and a 'Training' section.