

# ENA Document Catalogue System Concise User Guide

## 1. Introduction

This concise user guide to the document catalogue system is designed to provide some covering information and explanation to a system that is designed to be as intuitive as possible. Each field, button or other function on the site has a tooltip attached, which is displayed when the cursor is hovered over the field, button or blue question mark icon. These tooltips are an excellent source of context specific help with every aspect of the system.

If you find any errors or deficiencies in the system, have any queries about it including how to achieve certain goals or would like to suggest ways it could be improved, please use the 'Contact Us' facility available from the top navigation bar (next to the User Guide link) to inform us. We aim to respond to all feedback within 24 hours.

## 2. Login and registration

Users who are already registered or who have already purchased a document on the site should login with their credentials or, if these have been forgotten, please use the 'Forgotten Password' functionality to reset your password.

The latest version of the system allows customers to request an automated resend of any document previously ordered and to ensure that the ENA can contact customers who have ordered documents that have subsequently been subject to important amendments. This does mean, however, that if you have an existing account (as identified by your email address), the system will oblige you to use it! If preferred, users with an account can browse the system as 'Guest', add documents to an order and login at the point of purchase. However, if you already have documents in your basket under your logged in account, these will be merged with any added when browsing as a guest.

The document catalogue is open to all potential customers. ENA member (full or associate) users benefit from discounted documents but must first register and be approved on the site by clicking the 'Register' button on the login screen or by selecting 'Register' from the 'Guest' menu when browsing as a guest. Non-member users wishing to make a purchase for the first time do not need to register first. First registration can be most conveniently completed during the order process.

If preferred, non-member users can register before their first purchase if preferred by selecting the 'Register' option from the 'Guest' menu. On first registration, you will receive an email from the system instructing how to activate your account. It takes two minutes to complete activation and you are strongly encouraged to do so in order to access previous orders and receipts and to facilitate future orders. Once logged in, you can access your account and previous orders via the drop-down menu (top right) that shows your name. All registration data is private and is never passed to third parties except our payment provider, Worldpay. You may provide a card (billing) address to pass to Worldpay to speed up the payment process but this is not mandatory. Email addresses are always passed to Worldpay who will not process a merchant payment without one.

### **3. Document Status**

The catalogue has built up over many years with the earliest documents dating back to the 1960s. As such it is obvious that whilst the most recent documents are highly relevant and subject to frequent revision, others cannot really be considered current or have been superseded by later issues. In order to highlight this, each document is given a status:

- i. Current (Under Revision) – the document is up-to-date but work is underway on a revision. The expected date of publication of the new issue will be included on the document detail. Colour code: amber.
- ii. Current – the document is up-to-date. It may be revised in future but work is not currently underway on a new issue. Colour code: green.
- iii. Superseded – the document has been superseded by a later issue of the same document or by a different document that covers the same subject. Details of the document that supersedes it should be shown on the document detail. Colour code: red.
- iv. No Longer Maintained – this status largely applies to older documents. ‘No Longer Maintained’ documents have not been superseded by any later document but can no longer be considered current. Colour code: red.

Superseded and No Longer Maintained documents are retained on the catalogue as a historical reference and will most likely be ordered in this context. They are only available to ENA members. Use of the Information held in such documents is at the customer’s risk.

### **4. Browsing Documents**

Most users coming to the catalogue will know the number of the document required and can enter it in the top field of the search panel on the left of the home page, hit the return key or click the magnifying glass icon and the system will show any matches. However, one important tip for searching is that document numbers are quoted differently according to the source and can include a type signification, a letter, a number and a revision number. In any preliminary search, please enter just the number. This will almost always return the required document at or near the top of the list. For example, to find the latest version of document ‘ER G59’, just enter ‘59’. The latest issue of Engineering Recommendation G59 should be returned at the top of the list.

The search panel in the left provides further options for browsing documents. Help is available via tooltips. Lists of documents show the core details of each document but considerably more information is available on many documents and can be accessed by clicking the highlighted title of the document in the list to open a popup window showing the full set of information held against the document.

### **5. Ordering**

Documents are added to your basket by clicking the ‘Add to Order’ button on document lists or on the document detail popup. You can manage the contents of your basket by clicking the basket icon at the top right of the page. The icon also indicates how many documents are in your order. To proceed to checkout, click the ‘View Basket’ link from the drop down under the basket icon or click the ‘View Basket’ button from the bottom of the search panel.

For users with accounts, please note that any documents in your basket are preserved between visits to the system. As noted above, if you have documents in the basket of your account and also add documents to your basket when browsing as guest, the two will be merged when you login.

Orange buttons and their tooltips will guide you through the process of completing an order. Please note that, when completing a paid order, you are obliged to enter a shipping address because the address details are needed for the invoice. You are not obliged to enter a card/billing address but, if you do, it will be passed to our payment provider, Worldpay, which will make ordering quicker and easier especially if you use the system frequently.

Some documents including all Distribution Code documents are made available on the site without charge. The principle for ordering these is the same as for paid orders except that the payment steps are skipped and it is not necessary to provide a shipping address.

All orders are fulfilled by email with the document and any annexes sent as attachments to the email along with a receipt. The option to add annexes to documents was added in September 2021.

**You are reminded that you may not share documents ordered from the document catalogue outside your organisation.**

Documents are watermarked with the name of the person who ordered them as well as the date and time so that any unauthorised sharing can be traced.

## **6. Accessing account details, preferences and past orders**

Users must be logged on to carry out the following actions, which are accessed via the drop-down menu under their name in the menu bar towards the top right of the screen:

- i. Select 'My Details' to edit your account's contact, address and preference settings.
- ii. Select 'Past Orders' to view orders, request resends, download receipts or submit feedback on a document that was part of an order.

Please note that, to prevent possible abuse of member benefits, ENA members cannot change their own email addresses or company names and should use the 'Contact Us' facility to request such changes. Non-members can change their details at any time.

## **7. Submitting document feedback**

Introduced in September 2021, it is now possible for any logged in user to submit feedback on a document. Feedback can include anything from typos through more significant potential errors to ideas to extend or improve the next revision of the document.

This functionality can either be accessed the list of past orders accessed as described in section 6 above or simply via the document detail screen accessed by clicking the title in lists of documents shown in searches or under the various tabs on the home page as described in section 4 above. In each case there is an obvious blue button enabling feedback to be submitted.

The process of submitting feedback is intuitive and the usual tooltips are available. Once feedback is submitted, an email confirmation will be sent to the person submitting and to system administrators and, on approval, a confirmation is sent to the person who submitted the feedback. The feedback system allows the system administrator to respond to the feedback and any such response is included in the email confirmation of approval. The administrator may contact you to discuss your feedback and will normally do so by email in the first instance. You will be informed outside of the system if your feedback is not approved for any reason.