Tax & Accounting US Research & Learning

CCH® IntelliConnect®

Quick Start Guide
# Contents

**Getting Started** ......................................................................................................................... 2  
Logging into CCH IntellIconnect ......................................................................................................... 2  
The Search Bar ................................................................................................................................. 3  
The Quick Bar ................................................................................................................................. 4  
The Navigation Bar ......................................................................................................................... 4  

**Searching All of Your Subscription Content** .................................................................................. 5  
Sorting Your Search Results ............................................................................................................. 6  
Using Filters to Narrow Your Search ................................................................................................. 7  
Changing Your Search Scope .......................................................................................................... 8  
Using Advanced Search Options ..................................................................................................... 9  
Maintaining Multiple Search Tabs ................................................................................................... 9  
Viewing Search Results and Documents ......................................................................................... 10  
Viewing Documents Using the Split-Screen View ........................................................................... 11  
Locating Related Information ......................................................................................................... 12  

**Browsing Your Product Content** .................................................................................................... 13  
Using CCH™ IntellIconnect Browser Search .................................................................................... 14  
Searching from Browsed Content .................................................................................................... 15  
Viewing a Document List ................................................................................................................ 15  
Browsing Your Publication Titles (Titles A-Z) .................................................................................. 16  
Searching Your Publication Titles (Titles A-Z) ................................................................................ 17  
Searching by Citation ....................................................................................................................... 18  
Tracking Cases and Rulings with the CCH® Citator ......................................................................... 19  

**Recordkeeping** ................................................................................................................................ 20  
Integration with CCH Axcess™ Document ....................................................................................... 21  
Printing Documents ......................................................................................................................... 21  
Emailing Documents ......................................................................................................................... 22  
Emailing Multiple Documents .......................................................................................................... 22  
Saving Documents ............................................................................................................................ 23  
Using the Document Tray ................................................................................................................. 24  
Saving Links to Documents and Other Content ............................................................................. 25  
Using Research Folders .................................................................................................................... 25  
Using Notes and Highlights .............................................................................................................. 27  
Reviewing Your Research History .................................................................................................... 28  
Working with Favorites ...................................................................................................................... 29  

**Working with Tracker News** ............................................................................................................. 30  

**Tools/CCH® SmartCharts** ................................................................................................................ 33  

**Working with CCH® CodeConnect** .................................................................................................. 35  

**Preferences** ..................................................................................................................................... 37  
Practice Areas ..................................................................................................................................... 38  
My Profile ........................................................................................................................................... 39  

**Getting Help** .................................................................................................................................... 40  
Customer Support .............................................................................................................................. 40
Getting Started

CCH IntelliConnect is a robust, innovative program that provides you with all of the research tools you need to find the right information for your business needs. With state-of-the-art features and a seamless integration of high powered technology, you’ll have the flexibility, tools and know-how to complete your research quickly and easily.

Logging into CCH IntelliConnect

To log into CCH IntelliConnect from your Web browser:

- Point your Web browser to IntelliConnect.CCH.com.

The following Log In screen displays.

- At the Login Page, type your User ID (usually your email address) and password.
- Click the Log In button.
The Search Bar

At the top of the main CCH IntelliConnect window, and directly below the Navigation Bar, is the **Search Bar**. It is conveniently available on each screen, giving you the flexibility to perform a search from anywhere. On the Search Bar, you can perform the following tasks:

- Type your **search expression**.
- Select from a variety of **search scopes**.
- View previous **search expressions**.
- Set your **Advanced Search** options.

The Search Bar is available on every screen.
The Quick Bar

In the top left corner of CCH IntelliConnect is the **Quick Bar**. The Quick Bar contains a host of key functionalities that enable you to perform your research quickly and efficiently.

Access key CCH IntelliConnect functions from the Quick Bar.

You can perform the following actions from the **Quick Bar**:  

**Browse** — View and walk through your entire subscription.

**Research Folders** — Save important documents for later use.

**Citations** — Locate specific documents using their citations.

**Tracker News** — Set up and view the latest tax and business law news.

**Citator** — Track cases and rulings if available in your subscription.

**Tools/CCH SmartCharts** — View all the Practice Tools and CCH SmartCharts to which you have access.

**Document Notes** — View all the Document Notes to which you have access.

**Forms** — View all the Tax Forms to which you have access.

**IRS FAQs** — View the Top IRS FAQs.

The Navigation Bar

At the top of the main CCH IntelliConnect window is the **Navigation Bar**. The Navigation Bar contains a host of helpful links that allow you to quickly access the Document Tray or view and modify your research experience.

End your research session.

Get help with CCH IntelliConnect.

Temporarily store your research documents.

View your research history.

Manage your Practice Areas profiles.

Set your Preferences.

Get help with CCH IntelliConnect.

End your research session.
Searching All of Your Subscription Content

You can search your entire subscription by simply typing your search term(s) in the Search Expression box. By default, you will automatically be searching for all content.

- Type your search terms (e.g., tax exempt interest) in the Search Expression field at the top of any screen.

- Make sure that all content is selected in the “Search/Browse” drop-down menu.

- Click Go.

Your search results display in the right pane on a new tab, which is labeled according to your search expression.

TIP: When you search your entire subscription, the system also searches within any Practice Tools that are part of your subscription.
Sorting Your Search Results

After performing a search, you can sort your search results by document type, by relevance, or by most recent using options available at the top of your search results list.

- **Document Type** — Your search results are sorted according to document type (i.e., Explanations, Laws, Regulations, Cases, News, etc.)

To sort your results by document type, click in the checkbox next to Sort search results by Document Type.

- **Relevance** — Your search results are sorted according to the relevance of the document in relation to the search term(s) you used. Documents with the most relevance to your search term(s) appear at the beginning of the list.

To sort your results by relevance, click the Relevance link.

- **Most Recent** — Your search results are sorted according to the date of the document, with the most recent documents appearing at the beginning of the list.

To sort your results by most recent, click the Most Recent link.

Sort your search by document type, by relevance or by most recent simply by clicking the appropriate option at the top of your search results.

Here you can see search results that were first sorted according to relevance (in the preceding image) now sorted by document type!
Using Filters to Narrow Your Search

You can narrow your results by using filters. Filters, which appear in the left pane, break down the results returned into smaller, more meaningful categories so that you can easily manage your results.

To use the filters:

- Click the “+” and “–” icons to expand and collapse the filters, and then click on the filter you would like to apply to your results.

Filters are available in the following categories:

- **Document Type** — Filter your results by specific document type, such as Explanations, Laws and Regulations.
- **Tools/CCH SmartCharts** — Filter your results to include the Practice Tools and CCH SmartCharts located by your search.
- **Library** — Filter your results by the libraries included in your subscription, for example, Federal Tax, Securities or Pension.
- **Court** — Filter your results to include only specific courts. Just click on By Court to display the “Narrow your results by Courts” dialog box.
- **State Tax Type** — If you are a state tax researcher, you can filter your results by the various state tax types, such as Sales and Use and Corporate Income.
- **Jurisdiction** — Limit your results to include only specific jurisdictions. Just click on By Jurisdiction to display the “Narrow your results by Jurisdiction” dialog box.

Using multiple filters simultaneously

Apply any of the filters at the same time to further narrow your results. For example, if you are a state tax user, you can select a document type to narrow by a state tax type and specific jurisdictions — all at once.

Once you select a filter within a category, you will only see the filter you selected. To see additional filters in that category, just click the title of the category again.

See/remove the filters you selected at the top of the right pane in the “You’ve Selected” section.

After you run a search, the filters available will be listed here. The cross filter you selected first to narrow your results after your previous search is the cross filter that is shown open and expanded after you perform your latest search.
Changing Your Search Scope

To change your search scope, just click the “Search/Browse” drop-down menu and select a search scope or a Practice Areas profile (see page 33 for more information on Practice Areas profiles). Here are the search scopes available on CCH IntelliConnect:

- **All Content** — Searches all of the content in your subscription.
- **Explanations** — Searches just explanations in your subscription.
- **Within Results** — Searches just the results from the active search tab (see below for details).
- **Selected Content** — Searches just the items you have selected (i.e., clicked checkboxes) within the Browse Tree.
- **Within Document** — Searches just the active document on the screen.
- **Citations** — Searches for documents using a complete citation.

To search within your Search Results:

- With your search results displayed, click the “Search/Browse” drop-down menu and select **within results**.

  - Type a new search expression in the Search Expression field.
  - Click **Go**.

CCH IntelliConnect searches for your new search expression within the search results of the selected search, and your results display. The tab name will change based on the new search terms.
Using Advanced Search Options

With CCH IntelliConnect, you can set specific advanced search options. You can apply a thesaurus to your search, look up the synonyms of search terms or search according to a specific set of dates.

To set Advanced Search Options:

- Click the Advanced Search link located to the right of the Search Expression field.

Maintaining Multiple Search Tabs

Maintain multiple searches at one time. Each search is available on a separate tab, and you can quickly move back and forth between tabs just by clicking on them.

In addition to the search tabs, there is a permanent “Home” tab and tabs that display for features such as Browse, Citation Search, Citator, History, Research Folders and the Document Tray.
Viewing Search Results and Documents

Your search results appear in the right pane of your screen.

Click a page number to view other results pages.

Click the down arrow to change the number of results shown on each page.
Viewing Documents Using the Split-Screen View

When you click on any document on the list, the document will open in a preview pane at the bottom of the right pane. The top pane on the right side will display the search results, so you can easily walk through the results in the top pane and see the document text on the bottom.

The split-screen view lets you quickly scroll through lists to find documents of interest and evaluate multiple documents more quickly, without having to navigate back and forth between separate screens.

To preview a document from your search results:

- With search results displayed on your screen, click the link of the document you want to open.

The preview pane opens when you click the document you want to view.

Click to view your document in a new window.

Close the document.

View your document in full-screen mode.

Go to the next and previous documents on your search results list.

Go to the next and previous documents in publication or book order.
Locating Related Information

The Related Information feature is a smart cross-reference feature that links you to documents relevant to the documents you are currently viewing. Your related content is displayed in a separate window — allowing you to navigate faster and to never lose your original place. Note that Related Information buttons do not appear in all documents — only in selected documents based on your subscription.

To display a list of Related Documents:

- With a document onscreen, click the Related Information button. A list of related documents within your subscription (relevant to your current onscreen document) displays. Note that a new tab — Related Results — opens, and the related documents display on this new tab.

To locate specific related information by document type or by category:

- At the Related Results tab, click through the filters on the left to locate related documents — related explanations, annotations, laws, regulations and cases.
- When you find a document of interest, click on its title and the document will open in the preview pane.

Click a Related Information button to view a list of documents related to the selected document.
Browsing Your Product Content

CCH IntelliConnect makes it easy to find information of interest to you by allowing you to browse the product content to which you subscribe. You browse your product content directly from the Browse menu, which is an organized list of all of the content to which you subscribe.

**Note:** The Browse menu’s location, and the way in which the content it contains is presented, varies slightly depending on which “view” setting you are using: Tree or Library.

**To browse your product content (Tree View):**

- Click the **Browse** link (or icon) located on the Quick Bar, and if “Tree View” is not already selected, click the **Tree View** link located at the top of the Browse menu.

**TIP:** Any content selections you have made on the current Browse menu are cleared and the screen is reset when you switch to a different view setting.

- Click the plus “+” icon to the left of a content area of interest on the Browse menu to expand the selected section of the Browse menu and display the content contained at the next level.

- Continue to drill down through the Browse menu by clicking the plus “+” and minus “-” icons to the left of items to expand and collapse sections until you reach an area of interest.

- After you drill down to the document level in a specific section of your product content, click the link of the document you want to view.

  The document you selected is displayed in the window pane located to the right of the Browse menu.

**To browse your product content (Library View):**

- Click the **Browse** link (or icon) located on the Quick Bar, and if “Library View” is not already selected, click the **Library View** link located at the top of the Browse menu.

**TIP:** Any content selections you have made on the current Browse menu are cleared and the screen is reset when you switch to a different view setting.

- Click a library link from the list of libraries that is displayed, and then click the content area link you want to expand.

- Continue to click content links until you reach an area of interest.

- After you drill down to the document level in a specific section of your product content, click the link of the document you want to view.

  The document you selected is displayed in the window pane located to the right of the Browse menu.
Using CCH® IntelliConnect Browser Search

CCH IntelliConnect Browser Search is a complimentary browser add-on that instantly sends search queries through Wolters Kluwer’s subscriber content and displays the CCH IntelliConnect answers directly on the Google®, Bing® or Yahoo!® results page. No logging in and no more alternating between research tools! You’ll save time and money by taking both public and professional sources into consideration at once.

Download options:

- To download for single users, please click [here](#).
- To install on multiple computers over your network using Active Directory, please click [here](#).

From anywhere on the Internet, when more information about a tax-related term is needed, you can highlight the term, right click and choose “Search with IntelliConnect” to get Wolters Kluwer’s explanation.
Searching from Browsed Content

After you browse for content (and locate subject areas in which you have interest), you can still perform a search to further refine your results.

- Click in the checkboxes next to the items on the Browse menu you want to target for your search.

**Note:** When you click in a checkbox on the Browse menu, the search scope automatically changes to *selected content*.

- Type your search terms in the Search Expression field.
- Click **Go**.

**TIP:** To quickly expand or collapse all the items on the Browse menu, simply click the **Expand All** or **Collapse All** buttons.

Viewing a Document List

While browsing your product content on CCH IntelliConnect, you may find sections of your content on the Browse menu that contain many documents in which you have interest. You can click to select individual documents you want to view, or you can choose to display an entire list of the documents contained in the selected section.

**To view a document list:**

- After locating content of interest on the Browse menu, click in the checkbox(es) next to the content areas you want included in the document list.
- Click the **Document List** button.

The list of documents from the content areas you selected displays in the “Search Results” pane.

There may be times when you would like to add additional content areas to the document list.

**To add additional content to a document list:**

- With a document list displayed in the “Search Results” pane, click in the checkbox(es) next to any additional content areas you want included in the updated document list (without deselecting any of your current selections).
- Click the **Document List** button.

The document list is updated to include the additional content you selected.
Browsing Your Publication Titles (Titles A-Z)

With CCH IntelliConnect, you have another way to quickly find material pertinent to your research: *Titles A-Z*!

Titles A-Z is an alphabetized list of all the titles included in your subscription. If you know the title of the specific publication within your subscription you want to view, Titles A-Z gives you a quick and easy way to access that particular publication.

**To browse your publication titles:**

- Click the **Titles A-Z** button, which is located at the top of the Browse menu (and below the Quick Bar).

**Note:** If you have navigated away from the main page of CCH IntelliConnect and the Browse menu is no longer displayed, simply click the Browse link (or icon) located on the Quick Bar (or click the Home tab).

- Scroll through the list of publication titles, which are listed alphabetically until you find a publication of interest.

  - Or -

- Click one of the links located above the list of publications to quickly “jump” to that particular section of the list.

- Once you find a publication of interest, simply click the publication title link to quickly go to that particular location of the selected publication within the Browse menu.

In other words, once you click a publication title link, the Browse menu expands to the exact location of the publication title you selected, allowing you to quickly find documents of interest.

**TIP:** Publication titles that are grayed out indicate that those titles are outside the scope of your current practice area selections.
Searching Your Publication Titles (Titles A-Z)

Search all of the publication titles within your subscription. In other words, you can search your Titles A-Z!

Titles A-Z is an alphabetized list of all the titles included in your subscription. If you know the title of the specific publication within your subscription you want to view, Titles A-Z gives you a quick and easy way to access that particular publication.

To search your publication titles:

- Click the Titles A-Z button, which is located at the top of the Browse menu (and below the Quick Bar).

Note: If you have navigated away from the main page of CCH IntelliConnect and the Browse menu is no longer displayed, simply click the Browse link (or icon) located on the Quick Bar (or click the Home tab).

- Type your search terms in the Title Finder field.

As you type your search terms in the “Title Finder” field, the list of publications is filtered to only those titles that match your search terms.
Searching By Citation

Search for documents by citation, either by entering the entire citation on the search bar or locating the appropriate citation format within the available citation templates.

To search for a citation when you know the entire citation format:

- Click the “Search/Browse” drop-down menu and select citations.

- Type the citation reference you wish to search for in the Search Expression box. For example, Reg. Sec. 1.1001-1(a).

  **TIP:** If you have previously searched for this particular citation, click the Search Expression drop-down menu and select it from the list of previously used search expressions.

- Type the entire citation — including the citation format and number — in the Search Expression field. For example, Reg. Sec. 1-1001-1(a).

- Click Go.

  The document or a list of documents appears in the right pane.

To search for documents by citation:

- Click the Citations link (or icon) on the Quick Bar.

- Click the plus “+” icon to the left of a content area of interest on the Find by Citation menu (which is shown in place of the Browse menu in the left pane).

- Continue to expand areas of interest until you find the type of citation format you need for your search, e.g., Reg. Sec.

- Type the citation number in the appropriate field, e.g., 1.1001-1(a).

- Click Go.
Tracking Cases and Rulings with the CCH® Citator

Track the history of cases and rulings through the legal process by using CCH Citator. The Citator link will appear in the Quick Bar only if it’s available in your subscription.

The CCH Citator can help you determine whether a case or ruling is still current, whether there are any other cases or rulings on the same point of law that should be considered, and whether the ruling in the case is still good.

To locate a citator listing when you know the citation reference of the case or ruling:

- Click the Citator link (or icon) on the Quick Bar.
  All of the Citator templates to which you subscribe display in the right pane.

  **TIP:** You can browse the Citator formats included in your subscription by clicking the “+” and “−” icons to expand and collapse the menu items. After locating an area of interest, click the menu item to view associated Citator formats in the right pane.

- At the top of the Citator template, enter the complete citation reference in the “Enter a complete citation” field (e.g., *Revenue Ruling 99-1*).
- Click Go.

To locate a citator listing when you know the name of the case or ruling:

- Click the Citator link (or icon) on the Quick Bar.
  All of the Citator templates to which you subscribe display in the right pane.
- At the top of the Citator template, enter the name of the case in the “Enter a case name” field (e.g., *Brown v. Godwin*).
- Click Go.

To locate a citator listing when the case is on your screen:

- With the case or ruling onscreen, click the Citator link (or icon) on the Quick Bar.
Recordkeeping

Printing Documents

Print an individual document or multiple documents from your search results list in either PDF or RTF text format.

To print an individual document:

- Click the Print menu and select Print as PDF or Print as text.

- If you select Print as PDF the document is displayed in a new browser window, but the Print dialog box is not immediately displayed.

- Click the Print icon, or click the File menu and select Print.
  - Or -

- If you select Print as text, the document displays in a new browser window.

- On the Print dialog box, select your print settings and click the Print button.

To print documents from a search results list:

- Click in the checkboxes next to the documents you want to print.

- Click the Print menu and select Print selected as PDF or Print selected as text.
Integration with CCH Axcess™ Document

Saving Documents to CCH Axcess™

CCH IntelliConnect allows you to save documents you’ve found during your current research session to CCH Axcess Document.

**Note:** CCH Axcess Document is required.

- With the document you want to save to CCH Axcess Document open, click the Save/Email menu and select Save to CCH Axcess.
- Enter your valid CCH Axcess credentials in the spaces provided and click OK.

**Note:** Once you provide valid credentials, you won’t have to provide them again during the current research session.

- Type a name for the document in the space provided (or select the default file name).
- Type an entity name in the “Entity Name” field.

**Note:** As you begin to type an entity name, suggestions based on the entities you have in CCH Axcess Document are displayed. Click to select an entity from the list.

- Click the “Class” and “Subclass” drop-down menus and select a class and subclass for the selected document.

- Click the Save button.

The selected document is saved to CCH Axcess Document.

- Click OK to return to your research, or open CCH Axcess Document to view the document you just saved.

**Note:** Documents saved from CCH IntelliConnect are saved in the CCH Axcess Document top (i.e. root) folder.

**TIP:** To save multiple documents to CCH Axcess Document, click in the checkboxes to the left of documents in your search results list that you want to save to CCH Axcess Document, click the Save/Email menu, and select Save selected to CCH Axcess.
Emailing Documents

With CCH IntelliConnect, you can email a document of interest to another person.

- With the document you want to email open, click the **Save/Email** menu and select **Email document**.
- Type the email addresses to which you want to send the document in the spaces provided.
- Type the subject heading and email message in the appropriate fields.
- Click the **Send** button.

Emailing Multiple Documents

CCH IntelliConnect also allows you to select multiple documents to send someone in a single email message.

To email multiple documents:

- With search results displayed on your screen, click the checkboxes next to the documents you want to send.
- Click the **Save/Email** menu and select **Email selected**.

The “Email Document(s)” dialog box is displayed.

- In the “To,” “CC,” and “Bcc” fields, type the email addresses to which you want to send the documents.

**TIP:** After you email a document in CCH IntelliConnect, the “To” drop-down menu is populated with previously used email addresses.

- Type the subject heading for the email in the “Subject” field.
- Choose the format for the documents you are sending:
  1. The **Links** option allows you to send a recipient a list of hyperlinks embedded in an email message. Note that the recipient must have access to CCH IntelliConnect in order to view the documents.
  2. The **Attached PDF** option attaches all selected documents in a single PDF file.
  3. The **Text within body of email** option attaches the actual text of all selected documents within the body of the email message.
- Click the **Send** button.

The email is sent, and a confirmation dialog box is displayed.
Saving Documents

While performing research with CCH IntelliConnect, you can save a document to allow you to view it after you end your research session. Also, save notes and annotations made to documents. You can save a document as a PDF or RTF text file.

- With the document you want to save open, click the **Save/Email** menu and select **Save as PDF** or **Save as text**.

- Click the **Save** button.

- Select the location to which you want to save the file, type the name for the file in the “File name” field, and then click the **Save** button.

Once you click the Save/Email menu, you can save the document as a PDF or RTF text file, or email the document.
**Using the Document Tray**

While performing research on CCH IntelliConnect, you may find documents of interest that you want to view later during the same research session. You can temporarily save these documents for later viewing by using the Document Tray.

**To send documents from a search results list to the Document Tray:**

- With the document you want to send to the Document Tray open, click the **Send to Tray** link located at the top of the document.
- Or -
- From your search results or a document list, click in the checkboxes next to the documents you want to send to the Document Tray and click the **Send to Tray** link.

**To view documents in the Document Tray:**

- Click the **Document Tray** link at the top of the screen.

You can print, save and email documents you have added to the Document Tray, and you can add them to your Research Folders. When you no longer need a document you added to the Document Tray, you can simply remove it.
Saving Links to Documents and Other Content

Save external links to documents and specific product content.

To save an external link to a document:

● With the document you want to save the link for open, click the Save/Email menu and select Save link to document.

● The URL for the selected document is copied to your Windows clipboard and a confirmation message displays.

● Click OK to close the confirmation message dialog box. You can paste the URL you copied to your clipboard into another application for quick access to the document.

To save an external link to product content menu item:

● Click the Browse link (or icon) on the Quick Bar.

● Click in the checkboxes next to content areas on the Browse menu.

● Click the Save Links to Content icon located in the top of the Browse menu. The items you selected — along with their associated URLs — display in a separate Save Links to Content dialog box.

● Click the Copy selected URLs to Windows Clipboard button to copy the selected URLs to your clipboard (from which you can paste into another application).

Using Research Folders

Use Research Folders to save, organize and share documents and Practice Tools you find during your research session.

To access Research Folders:

● Click the Research Folders link (or icon) on the Quick Bar.

The folders you have created are listed in the left pane.

● To view the contents of a folder, click the folder name. All of the documents saved to that folder display in the right pane.

To create a new Research Folder:

● Click the Create new folder link.

● Type a name for the folder and click OK.
To save documents to Research Folders:

- If you have a document on your screen that you want to save to a research folder, click the Save/Email menu and select **Save document to Research Folders**.

- If you have existing Research Folders, you can select an existing folder or create a new folder, or if you have not yet created any Research Folders, type a name for the new folder in the space provided.

- After creating or selecting the Research Folder, you can save your notes and highlights with the CCH IntelliConnect document into the selected Research Folder by selecting **Include Notes and Highlights** in the “Include User Annotations?” dialog box.

**TIP:** If you want to save multiple documents from a search results list to a Research Folder, click in the checkboxes next to the documents you want to save, click the Save/Email menu, and select **Save selected to Research Folders**.

- Share selected Research Folders with other users. Allow users with whom you share a folder to contribute to the folder or give them read-only access. To share a research folder, click the options menu next to the folder name and select **Share with colleagues**.

- Users can also view shared folders from CCH Mobile™.

**Note:** Documents you store in **Research Folders** remain indefinitely until you delete them or delete the Research Folder itself.
Using Notes and Highlights

Add notes and highlights to documents you select and view from a document list.

To add notes to a document:

- Select some text within a CCH IntelliConnect document.
- Select Add Note from the pop-up menu.
- Enter your note.
- Click the Save button.

To add highlights to a document:

- Select some text within a CCH IntelliConnect document.
- Select a highlight color from the pop-up menu next to label “Highlight text.”

To view saved annotations on the Documents Notes Tab:

- Click the Document Notes option in the Quick Bar located above the Browse menu.
- Click a document title to open the document.
My Profile

Easily make changes to your User ID, password and your CCH IntelliConnect display name (which is used in items such as Tracker News emails).

To edit your profile:

- Click the Preferences link at the top of the screen.
- Click the My Profile tab.
- Click the Edit button.
- Type your current password in the “Enter your current password” field. (Note: To make changes to any of the profile settings, you must supply your current password.)
- Make any necessary changes to your password, User ID or display name settings.
- Click OK to save your changes.
- Click the click here to continue link to return to the “Preferences” dialog box.
- Click OK to close the “Preferences” dialog box.
Reviewing Your Research History

CCH IntelliConnect keeps a record of the recent searches you have performed and keeps track of the documents you have viewed while performing your research (whether by browsing or searching) within a feature called History.

The History feature keeps a 1 year record of the searches you have performed and the documents you have viewed.

Use History to view recent research activity (i.e., recently run searches, recently viewed documents, etc.). You can also use History to re-run recent searches, send documents to a Research Folder or to the Document Tray, print or save selected documents, and even print a copy of your recent research activity.

To view your research history:

- Click the History link at the top of the screen.
Working with Favorites

As you browse your product content in CCH IntelliConnect, you may find specific areas of your content that you research frequently. Just as the Document Tray can be used to “park” documents of interest for later viewing, My Favorites can be used to organize those publications, nodes and documents you research most frequently.

Once you save content to My Favorites, access that particular content more quickly the next time you log on to CCH IntelliConnect. You’re also able to organize favorites in the order you choose.

To browse My Favorites:

- Click the Browse link (or icon) on the Quick Bar.

- Click the plus “+” icon to the left of an item you have added to My Favorites to expand the item and display the content contained at the next level (Tree View), or click a library link from the list of libraries you have added to My Favorites (Library View).

**TIP:** You can search items in My Favorites just as you would any other content. Click in the checkboxes next to the items in My Favorites you want to search, type your search terms in the Search Expression field, and click Go.
Working with Tracker News

With Tracker News, set up automated daily searches for new articles to keep on top of the latest developments. Tracker News results can be sent to you directly by email or you can view them on CCH IntelliConnect. You also have the option to deliver results via an RSS feed straight to your RSS reader.

**To add a Tracker:**

- Click the Tracker News link (or icon) on the Quick Bar.
- Click the Add/Modify Trackers link located at the top of the left pane under the “Tracker News” heading.
- Click in the checkbox(es) next to the Tracker(s) you want to add, and then click the Add Tracker(s) button located at the bottom of the page.

**TIP:** Click the Target icon to the left of any Tracker you want to add to customize it.

If you have already added a Tracker, the Tracker is added to the list of Trackers to which you subscribe (and is added to the list of Trackers under the “Tracker News” heading on the left panel).

If, however, this is the first time you have added a Tracker, the “Tracker News Delivery Setup” dialog box displays.

- Click in the checkbox next to I would like to receive Tracker News via email if you want your Tracker News results sent to you in an email.
- If you chose to have your Tracker News results sent to you in an email, type your email address and user name in the spaces provided.
- Click OK.

The Trackers you have added are listed, along with the number of results returned by the search. Click a Tracker from the list to view the results.
To change Tracker delivery options:

- Click the Tracker News link (or icon) on the Quick Bar, and then click Add/Modify Trackers.
- Click the Delivery Options link.

The “Tracker News Delivery Options” dialog box is displayed, allowing you to set your email delivery and content options. You can also find the link needed by RSS readers to receive your Tracker News via your RSS reader.

![Tracker News Delivery Options dialog box with annotations]

You can copy and paste the URL into your RSS reader to receive the selected Tracker updates via RSS feed.
To modify a Tracker:

- Click the Tracker News link (or icon) on the Quick Bar, and then click Add/Modify Trackers.

The main “Tracker News” page is displayed on the “Tracker News” tab, and any Trackers to which you subscribe are listed under the “Tracker News” heading on the left pane.

- Click the Target icon \(\text{●} \) to the left of the Tracker you want to modify.
- Make any desired changes by checking and un-checking checkboxes.
- Click OK when you are finished.

To delete a Tracker:

- Click the Tracker News link (or icon) on the Quick Bar, and then click Add/Modify Trackers.
- Click the Delete icon \(\text{●} \) to the left of the Tracker you want to delete.
Tools/CCH® SmartCharts

In addition to your regular product content, CCH IntelliConnect provides you with a variety of helpful tools, including lookups, toolkits, calculators and other quick reference aids.

There are over 200 Practice Tools and CCH SmartCharts available within CCH IntelliConnect, and the Practice Tools and CCH SmartCharts available to you are based on the details of your subscription (i.e., the content to which you subscribe).

**TIP:** Be sure to turn off your browser’s pop-up blocker (if enabled) before opening a Practice Tool or CCH SmartChart.

To open a Practice Tool or CCH SmartChart from the Quick Bar:

- Click the **Tools/CCH SmartCharts** link (or icon) on the Quick Bar.

- Click the plus “+” icon to the left of a content area of interest on the Browse menu.

- Click the title (or **Tools/CCH SmartCharts** icon) of the Practice Tool or CCH SmartChart you want to open.

After locating a Practice Tool or CCH SmartChart you want to open, click the link or icon.
To open a Practice Tool or CCH SmartChart from a Search Results list:

**Note:** When you search your entire subscription, any Practice Tools or CCH SmartCharts that are part of your subscription are included in the search

- With your search results displayed in the “Search Results” pane, click the title of the Practice Tool or CCH SmartChart that you want to open.

  - *Or*

- Click the “+” icon to the left of the Tools/CCH SmartCharts filter in the Browse menu to expand the section and display the Practice Tool or CCH SmartChart organized by content area. Continue to click the “+” and “-” icons to the left of headings to expand and collapse the sections until you find a Practice Tool or CCH SmartChart of interest.

- Click the title (or Tools/CCH SmartCharts icon) of the Practice Tool or CCH SmartChart you want to open.

To open a Practice Tool or CCH SmartChart from the Browse menu:

- Click the Browse link (or icon) on the Quick Bar.

  - *Or*

- If you have the Browse menu “view” setting set to Tree View, click the plus “+” icon to the left of a content area of interest on the Browse menu to expand the selected section of the Browse menu and display the content contained at the next level.

  - *Or*

- If you have the Browse menu “view” setting set to Library View, click a library link from the list of libraries that is displayed.

- Continue to drill down through the Browse menu until you find a Practice Tool or CCH SmartChart of interest.

- Click the title (or Tools/CCH SmartCharts icon) of the Practice Tool or CCH SmartChart you want to open.
Working with CCH® CodeConnect

Only available on CCH IntelliConnect, CCH CodeConnect is a groundbreaking enhancement for federal tax users that makes it easier to get useful information out of the Internal Revenue Code by providing more context around your searches. This feature offers a guided search that brings you directly to your answer — saving you time by making sure you don’t go down the wrong path.

**TIP:** When accessing CCH CodeConnect from either CCH IntelliConnect or from within a Code Section document, make sure your popup blocker in your browser is turned off.

### Accessing CCH Code Connect from within CCH IntelliConnect:

![Image of CCH CodeConnect button](image)

Click the CCH CodeConnect link on the Quick Bar

### Accessing CCH CodeConnect from within a Code Section Document:

**Current Internal Revenue Code, SEC. 1031. EXCHANGE OF PROPERTY HELD FOR PRODUCTIVE USE OR INVESTMENT.**

![Image of CCH CodeConnect button](image)

Click the CCH CodeConnect button

### To search on CCH CodeConnect:

- Type keywords, a citation, or a question in the Search box. Search suggestions display as you type.
- Select a citation to go to the Code Section or subsection directly.

![Image of Wolters Kluwer interface](image)

Type your search terms  See your research history  Access your favorites  Manage your account profile
To save a favorite search:

- Click the star on search results.  

Results for "bonus depreciation" ★

- Once you save a favorite, you can access it from the Home screen or from a menu at the top of the screen.

To use the 360 View to get and view all related materials:

- When viewing a Code Section, you can quickly jump to a subsection (and all of its related materials) using a drop-down menu.

- All of the related materials are anchored around the pertinent Internal Revenue Code Section.

To find a specific code section in CCH CodeConnect:

- Type the number in the Search box. For example, type: 1031. You will see a list of suggestions drop down to help you run your search.

- Click a suggestion or press Enter to run the search.
Preferences

With CCH IntelliConnect, set individual search, document, help and browse preferences.

To set your preferences:

● Click the Preferences link at the top of the screen.

● Select or deselect checkboxes (or radio buttons) in the various sections of the “Preferences” dialog box to set specific preference settings.

● Click OK to save your changes and close the “Preferences” dialog box.

Customize the preference settings to suit your needs by selecting and deselecting the various options.

Note: Once you change your preference settings, the updated settings are maintained for all subsequent research sessions even if you log off of CCH IntelliConnect.
Practice Areas

Your CCH IntelliConnect subscription gives you access to business-specific content areas called Practice Areas. Practice Areas are the main content areas (or libraries) within your subscription, from which you can browse for content or perform searches.

In addition to browsing and searching all of the content within the Practice Areas included within your subscription, you can create customized Practice Areas profiles that contain only specific areas of user-selected content. In other words, you can create a Practice Areas profile that contains only Federal Tax content, give it a unique name, and then quickly select it from the “Search/Browse” drop-down menu.

To create a Practice Areas profile:

- Click the Practice Areas link located on the Navigation Bar (or the “Practice Areas” link located above the Browse menu).

The “Practice Area Setup” dialog box is displayed.

- Click the Create New button.

- Type a name for the new Practice Areas profile in the “Practice Area Name” field.

- Click in the radio button next to Show in drop down or Do not show depending if you want the profile to be displayed on the “Search/Browse” drop-down menu.

- Click in the checkboxes next to the Practice Areas content you want included in the profile.

- Click the Save button to save the profile and leave the “Practice Area Setup” dialog box open.

  - Or -

  Click the Save & Close button to save the profile and close the “Practice Area Setup” dialog box.
Getting Help

CCH IntelliConnect’s resourceful help system provides you with a wealth of information to assist you in learning how to use all of CCH IntelliConnect’s powerful features.

To access the help system:

- Click the Help link at the top of the screen.

You can also access various links on the “Home” page that provide you with demos, as well as links to customer support.

Customer Support

If you have any questions about CCH IntelliConnect, please do not hesitate to contact our team of specialized Customer Support personnel.

For assistance with research or functionality, please contact: 800-344-3734.

If you are having technical difficulties accessing the site, please contact: 800-835-0105.

You may also visit support.cch.com/chat.
Contact information:
Wolters Kluver
2700 Lake Cook Road
Riverwoods, IL 60015
United States
847-267-7000

Please visit www.CCHGroup.com for more information.