

# ***IntelliConnect***<sup>®</sup>

## **Participant Training Guide**

**December, 2011**



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## Introduction

IntelliConnect is an easy-to-use online research platform that combines the authoritative tax, legal and business compliance content of Wolters Kluwer Law & Business (including material from CCH, Aspen Publishers, Loislaw and Kluwer Law International) with sophisticated internet technology to save you time and streamline your workflow.

This **Participant Training Guide** is intended for use in a training session conducted by a Wolters Kluwer Law & Business Legal Training Consultant. It is useful for note-taking and will be a good reference later. The techniques and methods illustrated in this guide are applicable to all Wolters Kluwer Law & Business libraries.

Your subscription allows unlimited usage with no additional fees.

## Objectives

In this introductory course, you will be trained on research methods, unique timesaving features, and innovative access tools.

### Upon completion of this course, you will be able to:

- Access IntelliConnect
- Identify subscription content
- Apply 3 research methods:
  - Browse through publications
  - Search for word(s) within selected and all content
  - Retrieve documents by citation
- Use document management options
- Use product-specific tools

## Agenda

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## Registration & Logging in

All users must first register and setup their User ID and password.

- If your firm is IP authenticated, go to <http://intelliconnect.cch.com> and click the “**New User?**” link on the right side.
- If your firm is not IP authenticated, you will need a “**self-registration URL**” to retrieve the registration page.

The screenshot shows a registration form with the following fields: Email Address, Confirm Email, Password, Confirm Password, First Name, and Last Name. A 'Submit' button is at the bottom left. A progress bar at the top indicates 'Registration: Step 1 Step 2 Step 3'. Two callout boxes provide instructions: one pointing to the Email Address field with the text 'Use firm's email address.', and another pointing to the Password field with the text 'Make the password something you'll remember.'

- Once registered, you will return to the Log In page and enter your **Registered User ID** (your email address) and **password**.

To log in to IntelliConnect using MS Internet Explorer Browser version 6.0 or greater, go to <http://intelliconnect.cch.com>. You can add this URL to your firms' library page or MS IE Browser Favorites and create a desktop icon. See **Appendix A**, page 18, for instructions.


The screenshot shows the IntelliConnect login page. It features the Wolters Kluwer logo and the IntelliConnect® title. There are sections for 'Existing Users' with input fields for 'Enter your User Id(email address)' and 'Enter your password:', and a 'Log In' button. A 'New User?' link is circled and pointed to by a callout box that says 'If IP authenticated, click here to retrieve the Registration page.' Another callout box points to the 'Log In' button with the text 'Click to Log In.' A third callout box points to three checkboxes: 'Remember my User Id on this computer', 'Remember my password on this computer', and 'Log me in automatically', with the text 'Check boxes to remember ID and password and to log in automatically.'



# Home Page

The screenshot shows the IntelliConnect Home Page interface. Callout boxes provide the following information:

- Home returns you to this page.**: Points to the Home button in the top navigation bar.
- Menu Bar provides links to helpful features.**: Points to the top navigation bar containing links like Document Tray, History, Saved Searches, Practice Areas, Preferences, Help, and Log Out.
- Tool Bar**: Points to the secondary navigation bar with icons for Home, Browse, Research Folders, Citations, Tracker News, Citorator, and Practice Tools.
- The Search field is always available.**: Points to the search bar at the top of the page.
- Change the display of contents.**: Points to the 'Tree View' and 'Library View' options in the Browse pane.
- Help getting started and access to support information.**: Points to the 'Help Getting Started' and 'Support and Training' links at the bottom of the page.
- Banners highlighting new products or other information.**: Points to the 'ALERT Special Report' and 'NEW Smart Chart' banners on the right side.
- Add library or publication to My Favorites.**: Points to the diamond icon next to 'Federal Tax' in the 'My Favorites' section.

- **Tool Bar:** The Tool Bar provides links to key research tools.
- **Browse – Tree View | Library View:** You can access every library, publication, database and tool in your subscription via the Browse pane. A link on the Tool Bar enables access to the Browse pane at any time. Subscriptions can be displayed in either a Tree View or a Library View.
- **My Favorites:** Add frequently used content to My Favorites for quick access. Click the diamond  next to the desired library, publication, or database. Go to My Favorites at the top of the Browse pane to access that item in the future.

This close-up shows the 'My Favorites' section. Callout boxes provide the following information:

- Click the X to remove the item from My Favorites.**: Points to the 'X' icon next to 'Blue Sky Law Reporter [Securities (State)]'.
- Selections are listed in alphabetical order.**: Points to the list of items, which are sorted alphabetically.

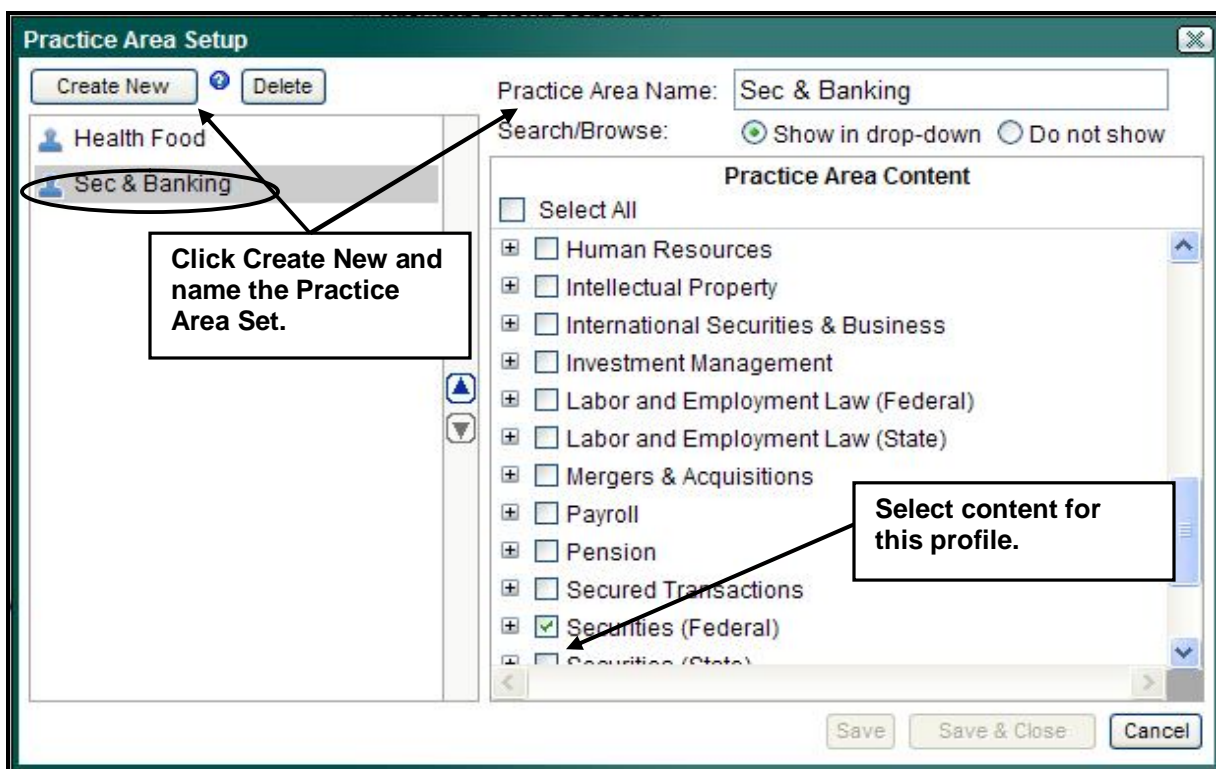


## Customizing Practice Areas

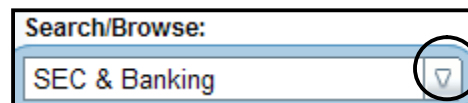
By default, your entire subscription content within IntelliConnect is available on the Browse pane, organized under Libraries. You can create up to 20 Practice Area profiles so that only certain content is available for browsing and searching.

### To create a change your Practice Area profile:

1. Click **Practice Areas** on the Menu Bar or at the top of the Browse pane.
2. Click **Create New**. The list on the right reflects the Browse pane items. You will only see the content available within your subscription.
3. Enter a **Practice Area Name** for the set of content you are going to select.
4. **Check the box(es)** for content you want to access. You can expand a library by clicking the "+". Check Select All to select/deselect all topics at once. Be sure to check items under Practice Tools at the bottom so that the Practice Tools link in the gray Toolbar will display the Practice Tools for this profile.
5. Click **Save**. Repeat for another profile if desired.
6. Click **Save & Close** or **Cancel** if you have already clicked Save.



- Switch between “all content” and your Practice Area profile(s) using Search/Browse drop-down.



## Browsing

The Browse pane lets you navigate through successive levels of content hierarchy – “Browsing” through publications and databases using either a Tree View or Library View.

To Browse through your subscription content:

1. Select **Tree View** or **Library View** (*this setting will ‘stick’ until you change it*)
2. Click the title, or use + in the Browse Tree to expand item(s) and “drill down” to documents.
3. When you click a **document**, it will display on the right.

**Browse panel commands – see below.**

**Click the “+” to expand the Browse Pane. Click the document you wish displayed.**

**Document Path shows the location of the document in the content hierarchy.**

**You can navigate to the next or previous document using the “Read” links on the top of the document.**

**Library View displays sub menus and publications.**

**Once an item is opened, the Menu Path displays current location and allows access to prior menu section.**

### Browse pane buttons:



- **Clear All:** To clear all checked boxes in the Browse Pane.
- **Expand All:** Expands first level of all topics
- **Collapse All:** Collapses all the open levels in the Browse Pane.
- **Show document list:** Check box(es) and click **Show document list** icon to display documents within selected content in the right pane in publication order.
- **Save links to content:** You can create links to specific publications or topics on your Microsoft IE Browser Favorites or your desktop. See **Appendix A**, page 19, for detailed instructions.
- **Titles A-Z:** View and search alphabetical listing of publications in your subscription. You can search for a title or an author name.



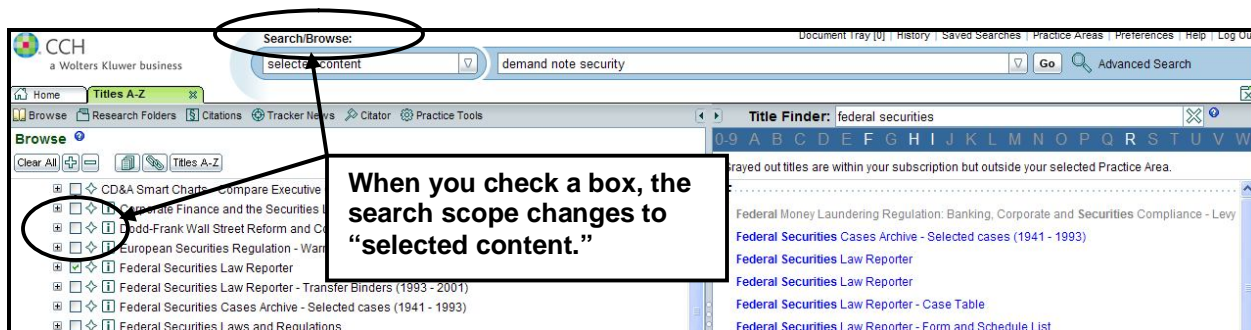
## Searching

You can determine the scope of your search in a number of ways:

- Initially, the Search scope is set to **“all content”** so you can search across everything in your subscription. This is a great way to collect all documents from various sources on a topic.
- If you customize your **Practice Areas**, you can limit the search to the content selected.
- You can also Browse and select specific libraries, publications, or databases and the search scope will change to **“selected content.”**

To conduct a **“selected content”** search:

1. Locate the desired content by Browsing or using the **Titles A-Z** tool.
2. When you have located the content you wish to search, **click in the checkbox(es)** next to the item(s). Note that the search scope changed to **“selected content”**.



3. **Type** search term(s) in the search bar at the top of your screen. You can also use **Advanced Search** for Thesaurus, Jurisdiction, Court, and/or Date restriction. **Reference Appendix B, page 19, for Search Tips.**
4. Click **Go**.

Note: Your **checkbox targets remain** set until you clear them or log off so you can continue searching your targeted content without returning to Browse. To **clear all checkboxes**, click **Clear All** at the top of the Pane.



## Viewing Search Results

- **Search Tabs:** Your search results list appears in the right pane on a tab noting the search phrase (abbreviated). Each new search appears on its own tab. Up to ten tabs of functions or searches can be displayed at one time.

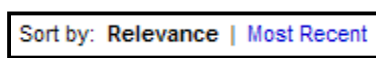
The screenshot shows a search results page for 'demand note secur'. Callouts point to the following features:

- Close all tabs.**: A button in the top right corner of the search results pane.
- Separate tab for search results.**: A callout pointing to the search tab 'demand note secur' in the browser's tab bar.
- Sort by Category.**: A callout pointing to the 'Categorized View' checkbox and 'Sort search results by Document Type' option.
- Filters to Narrow your Results.**: A callout pointing to the left-hand navigation pane with categories like 'by Document Type' and 'by Library'.
- Results displayed by document type.**: A callout pointing to the grouped search results under categories like 'Explanations' and 'Laws'.

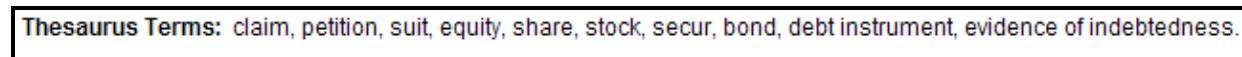
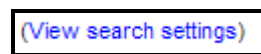
- **Sort by Document Type:** View the top 3 most relevant results grouped under Document Type categories. Use 'Jump to' links to quickly access a category. Collapse/Expand all groups or just an individual category.



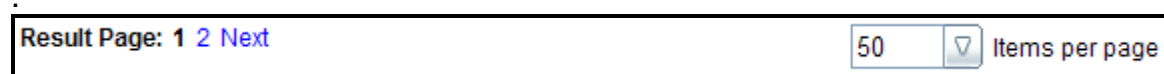
- **Sort by: Relevance | Most Recent:** Uncheck “Sort search results by Document Type” to view the list in Relevance order. You can select Most Recent to view dated documents, e.g., cases, rulings, news, in reverse chronological order.



- **Thesaurus terms:** Click **View Search Settings** (at top of search results) to view any substitute terms that were automatically included in your search.



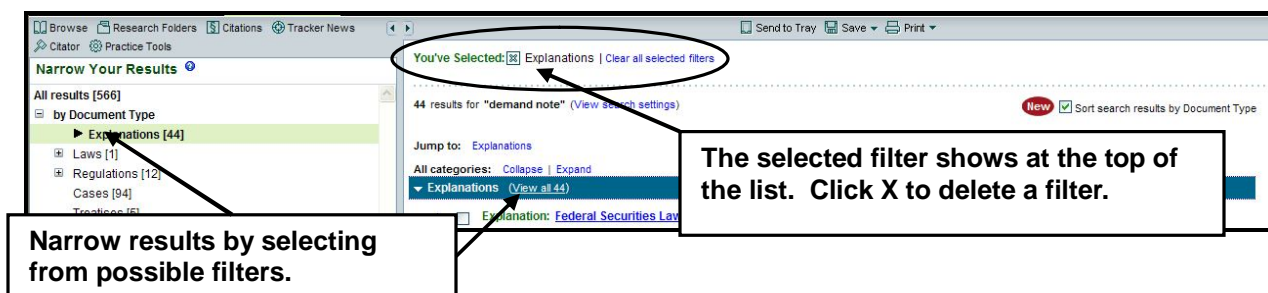
- **Results per page:** At the bottom of the results, list you can change the number of items per page (10, 25, 50 [default], 100, 200) and navigate between pages of results.



## Narrowing Search Results

**Filters:** You can narrow your search results by using the filters in the left pane. You will only see the filter types that apply to your current set of search results. Possible filters:

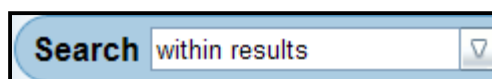
- **by Document Type:** Click a document type, e.g., Explanations, in the filters panel or click 'View all xxx' in the blue bar on the Search List.



- **by Citation:** The Citation filter appears only when the search expression includes a citation reference, e.g., *s1031 partnership*.
- **by Library:** Use the Library filter to view only those search results found within a particular library topic/publication/database.
- **by Practice Tool:** The Practice Tool filter shows you just the practice tools that were located by the search, such as interactive research aids, Smart Charts, and calculators.
- **by State Tax Type:** The State Tax Type filter organizes your search results according to specific tax type, e.g., corporate income or personal income
- **by Court:** Selecting the Court filter opens a box listing the courts reflected in the results. Check desired box(es), click OK and view the results for selected courts.
- **by Jurisdiction:** Selecting the Jurisdiction filter opens a box listing the jurisdictions of the results. Check desired box(es), click OK and view the results for selected jurisdiction(s).

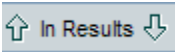
**Combined filters:** You can select multiple filters, e.g., a Library publication plus a Document Type, to cross filter the results.

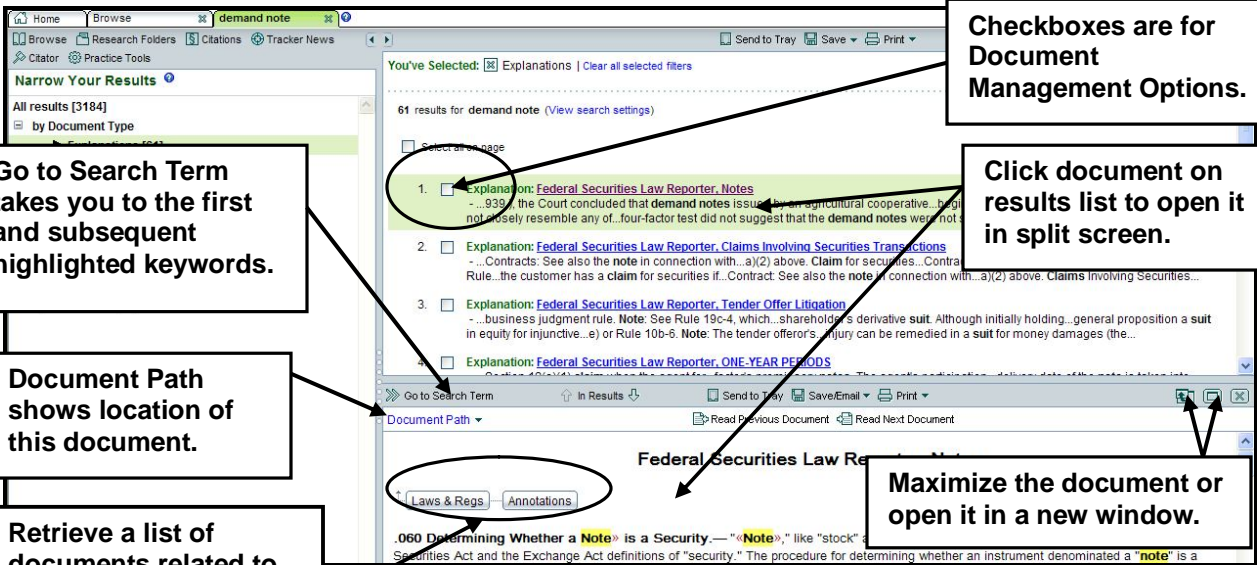
**Search within results:** You can change the scope to “within results” and enter different or additional words in your search expression to search within these results. The results list will change on this tab. All keywords from the first and second search will be highlighted.



## Viewing Search Results Documents

To view a document from your search results list, **click the title** of the document. The document will open in a preview pane under the results list.

- **Preview pane:** The document pane, or “preview” pane, contains the document’s title and the full text of the document.
- **Navigating search results:** You can use the  on the document tool bar to move through the Search Results documents or click on the document on the list.



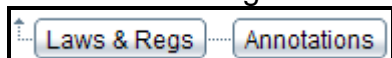
The screenshot shows a search results page for 'demand note'. It includes a left sidebar with 'Narrow Your Results' and 'All results [3184]'. The main area displays a list of search results with checkboxes and document titles. A 'Document Path' is visible below the list, and a 'Document Path' dropdown is shown below the first result. Callouts provide the following information:

- Checkboxes are for Document Management Options.** (pointing to the checkboxes in the results list)
- Click document on results list to open it in split screen.** (pointing to a document title in the results list)
- Go to Search Term takes you to the first and subsequent highlighted keywords.** (pointing to the 'Go to Search Term' button)
- Document Path shows location of this document.** (pointing to the 'Document Path' dropdown)
- Retrieve a list of documents related to this one.** (pointing to the 'Laws & Regs' and 'Annotations' buttons)
- Maximize the document or open it in a new window.** (pointing to the maximize and new window icons in the document toolbar)

- **Document Path** shows the location of this document within the subscription content. It lists the menu levels through your subscription to this document. You can click on any level of this path to go directly to that location within the Browse pane.



- **Related information** buttons will open a new search results tab with Laws, Regulations, or Explanations, etc., that are related to this document. You can filter this list using the Narrow Your Results selections on the left panel.



## Document Management



Items on the Results List can be selected by checking the boxes to the left.

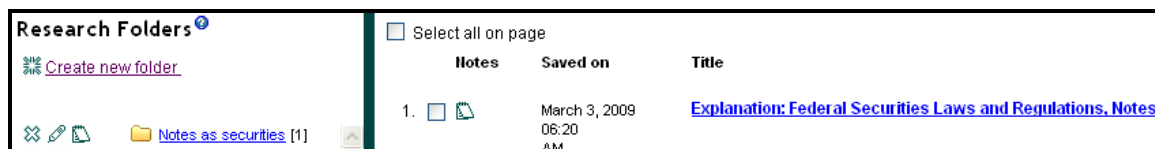
1.  Regulation: [Federal](#)

### Send to Tray

- Document Tray temporarily holds up to 50 documents. Items in the Tray, can be printed, saved to a file, copied/moved to Research Folder, or deleted.

### Save/Email

- To save a document(s), click *Save/Email* on the tool bar and choose to save as **text** or a **PDF**. The PDF version will retain all of the formatting of the document.
- **Save link:** copies the document link to your clipboard so you can paste it into a different application.
- **Email document:** Document will be sent as a PDF attachment by default – see Preferences for email options.
- **Save search:** On the Search Results list, you can save the search scope and search expression to Saved Searches. Access Saved Searches from the menu bar at top right.
- **Research Folders** store links to documents you want to keep for later reference. Research Folders are accessed via the *tool bar*. Within Research Folders, you can add new folders, rename folders, delete folders. You can add a note to documents within folders and on the folder itself. Links to documents stored in Research Folders will remain indefinitely until you delete them or delete that specific Research Folder. Documents saved in folders will have a folder icon on the document.



### Print

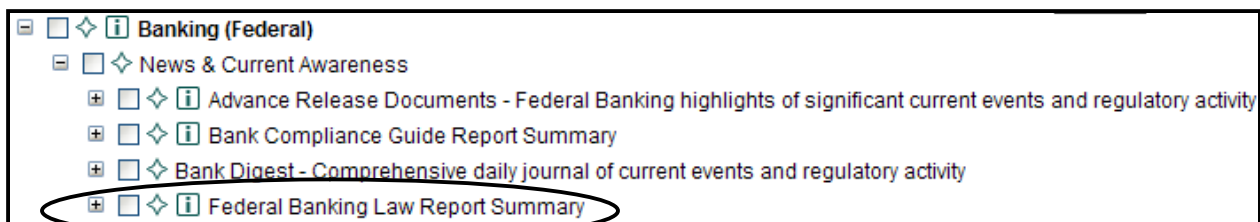
- **Print** prints a **text version** or a **PDF** version. The PDF version retains the formatting of the document and embedded links.
- To **print a section** within a document, highlight text then click the **printer icon** that appears above the highlighted text. The printed content will automatically include the title of document.



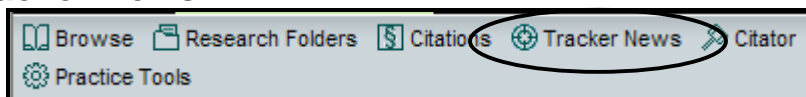
## Staying Current

### News

Within most of the library topics, there is a **News** section – except for Tax News which is a first level menu item. News contains CCH Reporter Report Letters, other newsletters and journals, Tracker Daily databases, Daily Document Update databases, White Papers and other current development items for the selected library topic. Each type of news item has its own update schedule which could be daily, weekly, twice a month, etc.



### Tracker News



**Tracker News** helps you keep on top of current developments two ways:

**Trackers:** Sign up custom searches specific to your areas of interest and access results within IntelliConnect, IC Mobile, or have them delivered via email or RSS feed.

You have no Trackers configured. Click [here](#) to configure Trackers.

To set up a tracker search:

1. Click [here](#) (if there are currently no trackers) or **Add/Modify Trackers** to open the list of available Trackers.
2. On trackers of interest, click the target icon to customize a search by document type, search word, etc.



3. Check the tracker's selection box, then click **Add Trackers**
4. To select type of delivery and email formatting, click **Delivery Options** at the top.

Trackers will be delivered via single email first thing in the morning.

**E-Newsletters/Report Letters:** Set up to receive selected news items in their entirety automatically via email or RSS feed.

[Sign up for E-Newsletters/Report Letters](#)

1. Click **Sign up for E-Newsletters/Report Letters**.
2. **Select Letters** you want to receive.
3. Click **Add**
4. **Email delivery:** enter email address, check box to deliver via email and click **Apply Changes**.

**For RSS feed:** Click the "Click here to view available RSS Feeds" and follow directions on the page.

Each Newsletter/Report Letter will be sent individually.

**More News:** Use links on Home page to sign up for free Tax, Business Compliance, and Health Care newsletters and get information about free IC Mobile apps.



## Citations

You can retrieve a document by its exact citation using the **Citations template**, the “**citations**” search scope, or conducting a **word search**.

### To find a document using the Citations Template:

1. Click on the **Citations** link in the tool bar.
2. In the left panel, click ‘+’ or Expand all button to view the library/publication categories for the document you want to retrieve. Click on a category title on the left to view the corresponding template for that category on the right.
3. Scroll through the template on the right to **find the field** for your document type and citation.
4. **Type** the document number or citation in a template box.
5. Click **Go** next to the citation you entered.

### To find a document using the search scope:

1. Click on the search scope drop down and select “**citations.**”
2. **Type** in a citation and click **Go**.

**Note:** You can indicate a specific publication, e.g., *fed s165* retrieves code section from Standard Federal Income Tax Reporter; *s165* retrieves code section from Internal Revenue Code database. Other examples: Federal Securities: SEC Form 10; 17cfr 229.301; 15 USC 78n; 34 Act s14(b); Medicare case: 525 u.s. 249; Labor & Employment: 29 cfr 1640.

To find a document along with other documents referencing that citation and perhaps other key words, use word search:

1. Select your search scope -- either **all content** or **selected content**.
2. **Type** in the citation, and key words if desired with no connectors, and click **Go**.



## CCH Citator

The CCH Citator is available with subscriptions to **Federal Tax, Financial and Estate Planning, State Tax, Govt Contracts – Board of Contract Appeals Decisions.**

The CCH Citator will 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. The CCH Citator also lists court cases and rulings that significantly comment on a cited case or ruling. It shows all paragraphs where a cited case or ruling is annotated. It also provides citations to cases and rulings that may have been superseded by or may supersede your case or ruling.

To find a citator listing using the Citator:

1. Click the **Citator** on the tool bar.
2. Click the '+' to expand a library in left navigation pane.
3. Click the title of a template in the left navigation pane so correct template appears in the right pane.
4. Scroll down the template to find the specific document type you wish to retrieve.
5. Enter the needed information for the citation. If you know the case name, you can type it in the appropriate field at the top

The screenshot shows the CCH Citator interface. On the left, there is a navigation pane with a tree view under 'All Citator Formats'. The 'Citator-Federal Taxes' folder is expanded, showing sub-categories like 'CASES', 'RULINGS', and 'DISCONTINUED RULINGS: A-L'. The 'Citator-Federal Taxes' folder is selected. The main area contains a search form with the following fields and buttons:

- 'Enter a case name:' field with the text 'soliman' and a 'Go' button.
- 'Enter a complete citation:' field with a 'Go' button.
- 'All Citations' section with a 'CASES' sub-section.
- 'CASES' section with a field for 'USTC' and a 'Go' button.
- 'CASES' section with a field for 'US' and a 'Go' button.

A callout box with a black border and white background contains the text: 'Enter case name or a citation on the template.' Two arrows point from this box to the 'Enter a case name:' and 'Enter a complete citation:' fields.

6. Click **Go**. The system displays a Citator listing for all documents associated with the citation you entered on the template (in a new results tab). Click the one you want and it will display in the preview pane. Example of a Federal Tax Case indicating parallel citations, annotation links, and history of the case and the cases citing it.

### Federal Tax Citator, 2009FED, Main Citator Table, Soliman, Nader E.

Soliman, Nader E.

ANNOTATED AT ... [2009FED ¶12,523.477](#), [¶14,854.027](#), [¶14,854.94](#), [¶39,651G.305](#), [¶39,652.34](#)

• Sct- (rev'g CA) [93-1 USTC ¶60,014](#), [506 US 168](#), [113 Sct 701](#)


Sorrentino CA-10, [2004-2 USTC ¶60,372](#), [383 F3d 1187](#)

Textron, Inc. CA-1, [2003-2 USTC ¶60,571](#), [336 F3d 26](#)



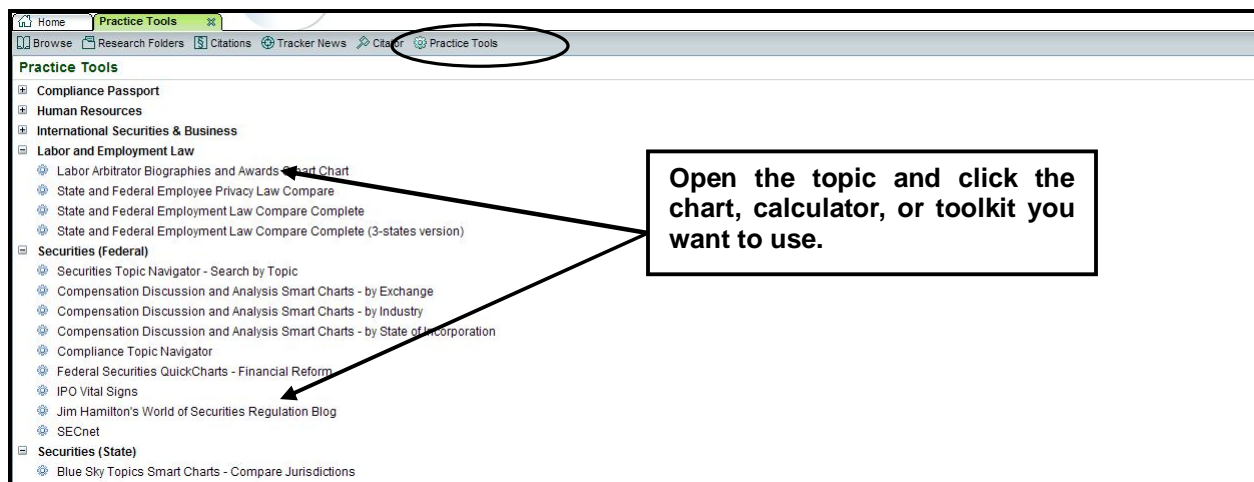
## Practice Tools

Practice Tools include such items as Smart Charts, calculators, Interactive Research Aids, toolkits, and referral links to other subscription services. Practice Tools are available from the tool bar, from the Browse Pane (at the bottom), and from within the Browse menu of some of the Library selections, e.g., Intellectual Property.

Note: To add a Practice Tool to My Favorites, use the Browse Pane to locate the Practice Tool and click the My Favorites icon. 

To locate a practice tool:

1. Click **Practice Tools** on the tool bar (or locate Practice Tools on Browse Pane or within a library). Note: If you choose “all content” in Search/Browse, you will be able to view all of the Practice Tools included in your subscription.
2. Click the **+** for a topic. (The topics and tools displayed will be restricted by your current Practice Area settings.)
3. **Click the Tool** you want and it will open in a separate window.



- **Smart Charts:** Most Smart Charts have a tool bar for saving the information you generate.



## History

Document Tray [0] **History** | Saved Searches | Practice Areas | Preferences | Help | Log Out

History lists the last 20 documents (by default) or the last 20 searches from your research activity during the last 60 days.

**Click a document to open in Preview pane.**

**Click a search to rerun the search and retrieve current search results.**

**Use View Trail to display a mix of your prior searches and documents- up to 200 items.**

## Preferences

Document Tray [0] | History | Saved Searches | Practice Areas | **Preferences** | Help | Log Out

IntelliConnect includes a number of Preferences you can set to further customize your research experience. There is a My Profile tab to change your ID, password, name.

**Double-click document in results list to open it in...**

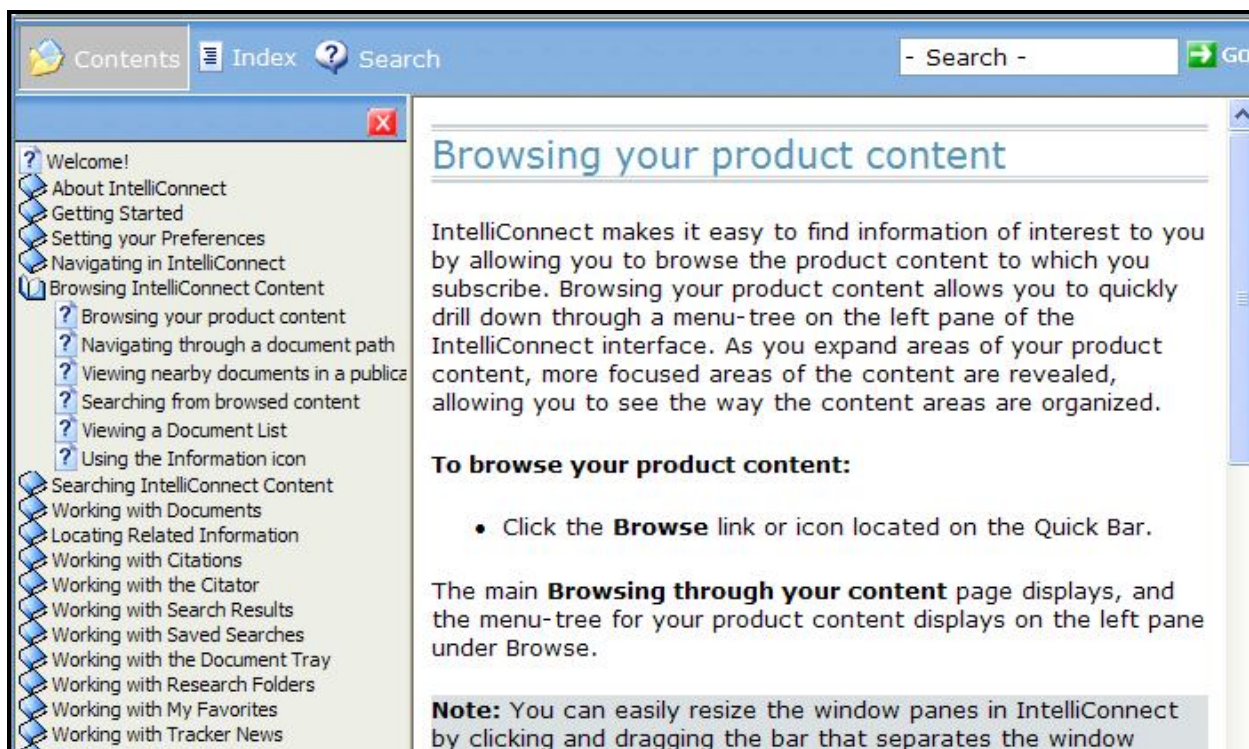
**Print multiple documents (non-PDF printing only)**

**Default View**



## Getting Help

- To access built-in help pages, click **Help on the menu bar:**



- Wolters Kluwer Law & Business Customer Support (Toll-free):  
**1-800-449-6435** #2 - Product Support or #3 - Technical Support  
Support available **Monday through Friday, 8:00 a.m. – 8:00 p.m. (Central)**
- Live Chat:** <http://support.cch.com/chat>
- Email:** [customerservice@wolterskluwer.com](mailto:customerservice@wolterskluwer.com)

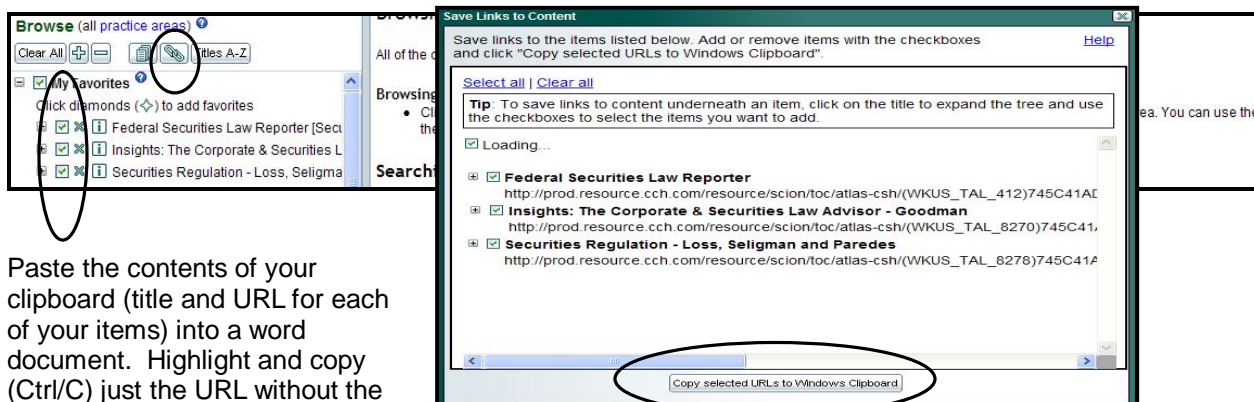
## Logging Out

- Click **Log Out** on the Menu Bar when you finish your research session.



## Appendix A: Saving Links to Content

- **To save the IntelliConnect Log in page on your MS IE Browser Favorites:**
  1. Go to <http://intelliconnect.cch.com>
  2. Click Favorites on the MS Internet Explorer Browser menu bar.
  3. Click Add to Favorites. (You can select a folder or just put it on the Favorites list.)
- **To save the URL of content within the Browse pane:**
  1. Within IntelliConnect, locate the content on the Browse menu.
  2. Check the box(s) next to the desired content.
  3. Click Save Links to Content (the chain link icon)
  4. Click Copy selected URLs to Windows Clipboard. Click Allow access and OK if/when prompted.



5. Paste the contents of your clipboard (title and URL for each of your items) into a word document. Highlight and copy (Ctrl/C) just the URL without the title.
6. Paste the URL into desired location, e.g., a links page or in a Browser address field to save to Favorites (see next section).

- **To Create Browser Favorite**
  1. Follow steps 1-6 above
  2. Open a new Browser window
  3. Paste URL into the Browser address field and click Go
  4. Click Favorites > Add to Favorites
- **To create a Desktop icon for an item on the MS IE Favorite list:**
  1. Follow steps 1-6 above.
  2. Right-click on an empty area of your desktop and select New>Shortcut.
  3. Where it say "Type the location of the item," past the URL (from step 6 above) and click Next.
  4. When prompted for a name, enter a name that is meaningful to you, e.g., "Securities Regulation w/IntelliConnect," and click Finish.
  5. Close out of the Browser and look at your desktop for the icon you just created as a Desktop shortcut.

Note: when using a link or Browser Favorite to access specific material within IntelliConnect, the Browse pane will be expanded and show all topics in relevant category, regardless of current Practice Area selections. You can still browse to different content, but if that content is outside of the selected Practice Area, you will not be able to search through it.



## Appendix B: Search Tips

### Search Phrase

By default, IntelliConnect processes searches as an “AND” search if you enter several words. We recommend doing a simple word(s) search and then filter and/or search within the results. If you wish to use a Boolean operator such as “OR” or a proximity connector such as “w/20,” IntelliConnect will recognize those connectors and will process them accordingly. All search expressions will be evaluated to see if they contain a Boolean connector and, if so, those connectors will be handled using a standard operating logic. IntelliConnect automatically searches for both singular and plural forms of search terms, unless the search expression is a term of art.

### Boolean Operators and Proximity Connectors (in order of precedence):

**space** .....implicit “and” between words if not in a quoted phrase.  
**or**.....officer *or* director  
**w/n**.....security w/5 defin\*  
**w/20**.....”rule 506” w/20 exempt\* (w/sen = w/20)  
**w/80**.....”audit committee” w/80 controls (w/par = w/80)  
**p/n**.....property p/2 tax (p = preceding)  
**and**.....churning *and* rule 10b-5  
**not**.....rico *not* Puerto

- If **multiple proximity connectors** (w/n, p/n) are used in a search expression, they are processed from RIGHT to LEFT.
- If using a **proximity connector**, you must enter the connector ‘and’ between words where needed (a space will no longer be an implicit ‘and’).
- **Parenthesis** can be used to override the order of precedence
- **Use quotation marks to force a phrase:** “reasonable and proportional” (‘and’ is now a search term and not a Boolean operator). **Note: using quotations will turn off the Thesaurus for the quoted phrase, unless it is a term of art, e.g., “nursing facility”**

### Wildcards: asterisk (\*) and the question mark (?)

Use an asterisk “\*” to indicate multiple letters (truncate a word), e.g., *requir\** for *require, required, requiring*. *Cap\*tion* for *caption, capitalization, capitalisation*.  
 Entering just an asterisk in the search expression will retrieve everything in the search scope.

### Question Mark:

A “?” can be used in place of a single character, e.g., *r?n* for *run, ran*. Also, *b??n* for *barn, born, burn* but it would not find *ban, ben, bin, bon, bun, brain, bison*. You can also use the “?” to find only the singular or plural form of a word during a search, e.g., *se?urity* will retrieve just the singular form of word.

### Terms of Art:

Some acronyms and multiple word phrases are automatically recognized as “terms of art” and will have synonyms substituted during a search even if they are in quotes or the Thesaurus is turned off. For example: *snf, nursing facility, charitable contribution*. Some terms of art do not automatically include singular/plural forms.



## • Search/Browse Scope

Search Scope allows you to select a Search mode, including Practice Area set to limit the scope of your search:

Search/Browse:
selected content
all content
SEC & Banking
Fed Tax
within results
selected content
within document
citations

- **all content** – searches all of the content in your subscription. This is the default selection.
- **Practice Area profiles** – once created, appear between ‘all content’ and ‘within results’ on the drop-down list and allow you to restrict a search to specific content.
- **within results** – once you have retrieved results from a search, you can search just those results on the active search tab. All the original key words plus the new ones from the search within results will be highlighted in the documents.
- **selected content** – searches the content you have selected (i.e., clicked the checkboxes) within the Browse pane.
- **this document** – searches just the active document on the screen. The new search words will be highlighted.
- **citations** – certain content can be retrieved by citation using this selection.

## Advanced Search

- To preview or turn on/off the **Thesaurus** (on by default).
- To restrict your search by **Jurisdiction** or by **Court**.
- To add a **date restriction** to your search when searching through dated documents, e.g., news, cases, rulings, no-action letters, etc.

The screenshot displays the 'Advanced Search' interface. At the top, there is a search bar with 'selected content' selected in a dropdown menu and a 'Go' button. Below the search bar, there are several sections:

- Thesaurus:** A checkbox labeled 'Apply Thesaurus' is checked. Below it is a 'Synonym Lookup' field with a 'View Synonyms' button.
- Limit Search To:** This section contains three expandable menus:
  - Jurisdictions (select):** Currently shows 'No Search Limits Applied'.
  - Courts (select):** Currently shows 'No Search Limits Applied'.
  - Date:** Includes dropdowns for 'Any Day', 'month', 'dd', and 'yyyy'. An example date 'January 01, 2008' is shown below the date fields.
- Clear Search Limits:** A button located below the date fields.
- Apply these search limits to future searches until I log out:** A checkbox that is currently unchecked.

On the right side of the interface, there is a 'Help' section with links to 'Searching Tips', 'Boolean Connectors', 'Exact Phrase Search', 'Thesaurus', and 'Search Demo'.

A callout box with a black border and white background is positioned over the 'Limit Search To' section. It contains the text: "Your Jurisdictions and Courts restrictions can continue to apply to subsequent searches until log out or you click Clear Search Limits." Two arrows point from this callout box to the 'Clear Search Limits' button and the 'Apply these search limits...' checkbox.

