

IntelliConnect[®]



Participant Training Guide

November, 2013



 Wolters Kluwer
Law & Business

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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 registration form has six input fields: Email Address, Confirm Email, Password, Confirm Password, First Name, and Last Name. There are two callout boxes: one pointing to the 'Email Address' and 'Confirm Email' fields with the text 'Use firm's email address.', and another pointing to the 'Password' and 'Confirm Password' fields 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, 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 log in page has fields for Existing Users (User ID, password, forgot password), a 'New User?' link (circled in red), and a 'Log In' button. Below the login area are three checkboxes: 'Remember my User Id on this computer', 'Remember my password on this computer', and 'Log me in automatically'. A callout box points to the 'New User?' link with the text 'If IP authenticated, click here to retrieve the Registration page.' Another callout box points to the checkboxes with the text 'Check boxes to remember User ID and password and to log in automatically.'



IC Mobile app - Once you have an IntelliConnect User ID and Password, you can use the complimentary **IC Mobile** app, available for iPhone, iPad and Android. Customize the Home page with items from My Favorites.



Home Page

The screenshot shows the IntelliConnect Home Page with several features highlighted:

- Home returns you to this page.**
- Tool Bar**: Provides links to key research tools.
- The Search field is always available.**
- Change the display of contents.**
- Re-organize favorites.**
- Add library, sub-topics or document to My Favorites.**
- IntelliConnect news, help getting started and access to support information.**
- Banners highlighting new products or other information.**

- Tool Bar:** The Tool Bar provides links to key research tools.
- Browse - Tree View | Library View:** Access all content in your subscription via the Browse pane. A link on the Tool Bar enables access to the Browse pane at any time. Change Views between Tree (all libraries) or Library (single library).
- My Favorites:** Add frequently used content to **My Favorites** by clicking the diamond next to a desired library, publication, database or Tool/Smart Chart. Add your Favorites to IC Mobile app's Home page.

The screenshot shows the 'My Favorites' section and the IC Mobile app interface:

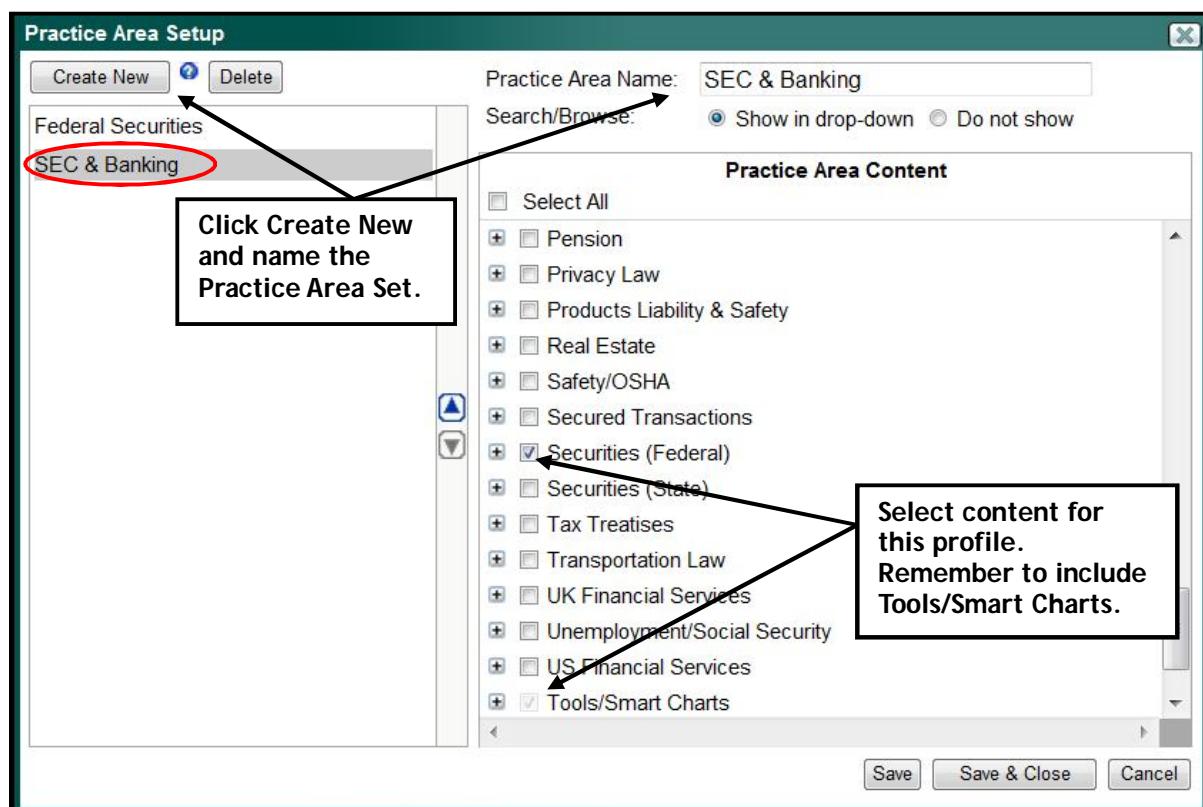
- My Favorites (Manage Favorites)**: Shows a list of favorite items organized alphabetically. A callout box states: "Items are organized alphabetically and can be re-organized." Another callout box says: "Click X to remove a Favorite."
- IC Mobile**: Shows a grid of favorite items with options to "Add or remove favorites on this screen" and "Browse Contents".

Customizing Practice Areas

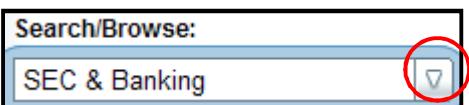
By default, your entire subscription content within IntelliConnect is available on the Browse pane, organized under Libraries. You can create up to 20 Practice Area profiles so that only certain content is available for browsing and searching.

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 Tools/Smart Charts at the bottom so that the Tools/Smart Charts link in the gray Toolbar will display the Tools/Smart Charts 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.

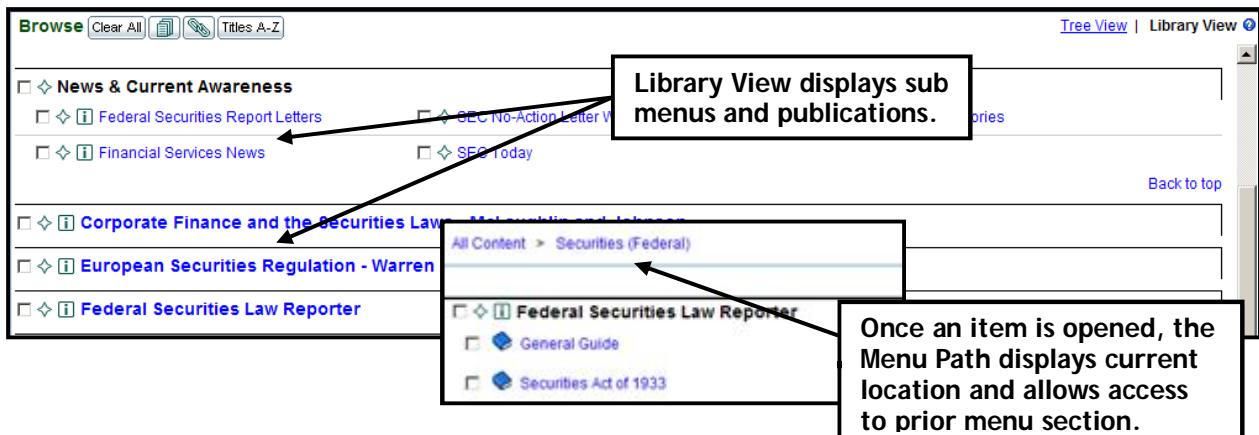
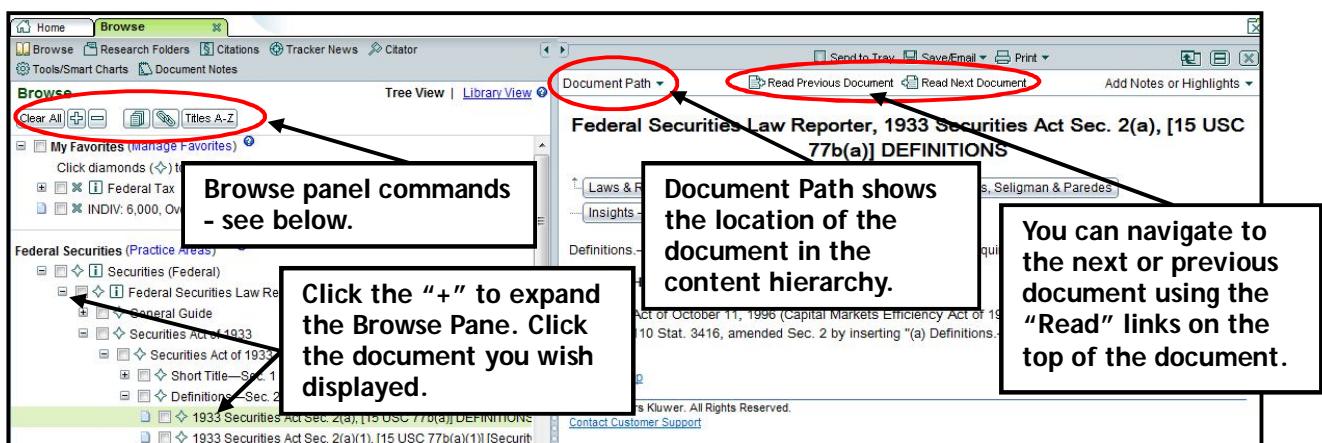


Browsing

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 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 18, 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 **Practice Areas** (PAs) were created, you can limit a search to a PA profile.
- You can also Browse and select (check box) specific libraries, publications, or databases and the search scope will change to “**selected content**.”

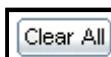
To conduct a “**selected content**” search:

- Locate the desired content by Browsing or using the **Titles A-Z** tool.
- 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.”



- 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.**
- 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 the IntelliConnect search interface with the search term 'demand note security' entered in the top bar. The results are categorized under 'Explanations' and 'Laws'. A callout box labeled 'Filters to Narrow your Results.' points to the left sidebar where filters like 'by Document Type' and 'by Library' are listed. Another callout box labeled 'Separate tab for search results.' points to the top right corner of the main results area. A third callout box labeled 'Switch between Relevance or Most Recent order.' points to the sorting options at the bottom of the results page. A fourth callout box labeled 'Categorized View: Top 3 results are displayed by document type.' points to the top of the 'Explanations' section.

- Categorized View:** View the top 3 results grouped by Document Type in Relevance or Most Recent order. Use 'Jump to' links to quickly access a category. Collapse/Expand all groups or just an individual category.

The screenshot shows the 'Categorized View' settings. It includes a checkbox for 'Sort search results by Document Type', a link to 'Jump to: Explanations | Laws | Regulations | Cases | IRS Materials', and a link to 'Sort by: Relevance | Most Recent'.

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

Sort by: Relevance | Most Recent

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

Thesaurus Terms: claim, petition, suit, equity, share, stock, secur, bond, debt instrument, evidence of indebtedness.

- 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.

Result Page: 1 2 Next

50 ▾ Items per page



Narrowing Search Results

Filters: You can narrow your search results by using the filters in the left pane. You will only see 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 Tools/Smart Chart:** The Tools/Smart Chart filter shows you just the Tools/Smart Charts 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).

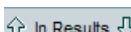
Combined filters: You can select multiple filters, e.g., a Library publication plus a Document Type, to cross filter the results.

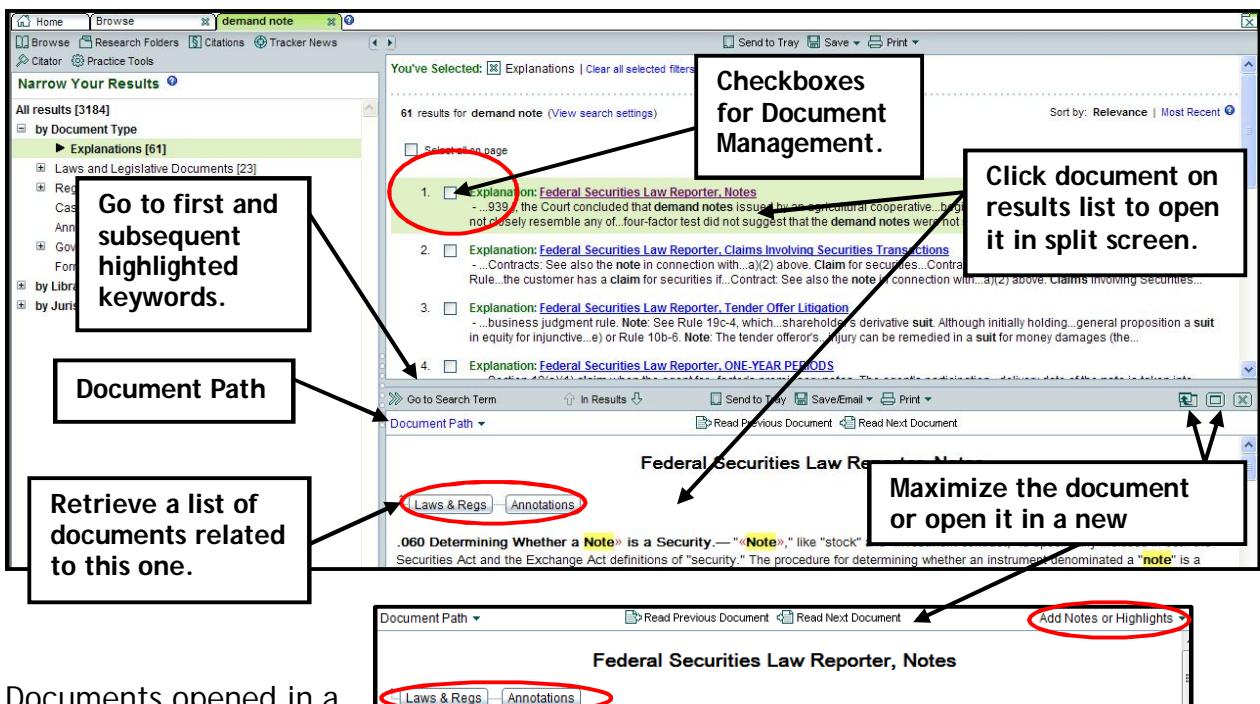
Search within results: You can change the scope to "within results" and enter different or additional words in your search expression to search within these results. The results list will change on this tab. All keywords from the first and second search will be highlighted.

▼


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:** Use the  on the document tool bar to move through the Search Results documents or click a different document on the list.



- Documents opened in a **New Window** include Note/Highlight options and Related Information buttons.
- **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 Related Results tab with Laws, Regulations, or Explanations, etc., that are related to this document. Document type Related Information buttons change depending on the document you are on.



Document Management:

Send to Tray Save/Email Print

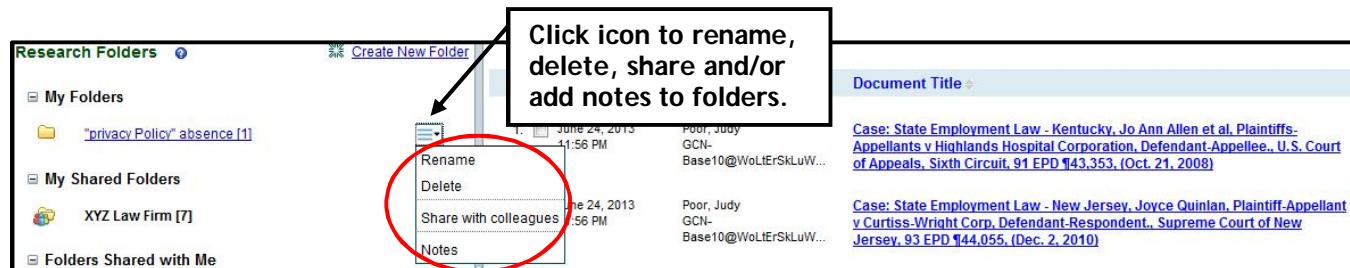
Document management options are on the Tool Bar above open documents and above the Results List. Select items on the Results List by checking the boxes to the left.

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

- **Save:** To download a document or selected items on a list, 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 and embedded links.
- **Save link:** copies the document link to your clipboard so you can paste it into a different application.
- **Email:** Document(s) may be sent either as Links, attached PDF, or Text within the body of email.
- **Save search:** On the Search Results list, you can save the search scope and search expression to Saved Searches. Access Saved Searches from the top Menu Bar.
- **Research Folders** store up to 1200 folders, with up to 500 links to documents in each folder. Research Folders are accessed via the **Tool Bar** **Research Folders**. Documents in research folders will automatically be updated as the database is updated. Links to documents stored in Research Folders will remain indefinitely until you delete them or the Research Folder. Documents saved in folders will have a folder icon on the document.

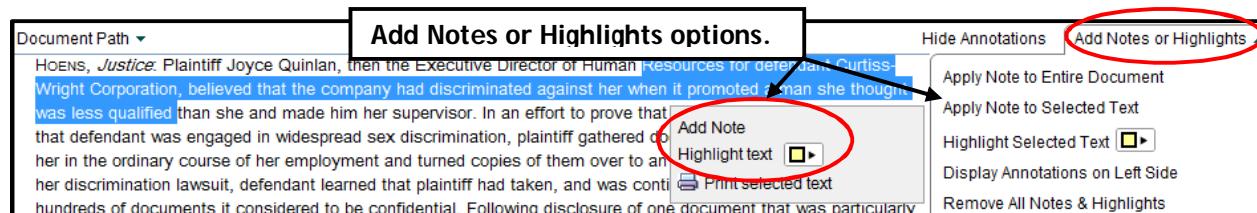


Print

- **Print** document in **text** or **PDF** format. PDF format retains the formatting of the document.
- To **print a section** within a document, highlight text then click the **printer icon** that appears above or below the text, or you can click **Print Selected text** on the tool bar. The printed content will automatically include the title of document.

Notes & Highlights

- To add a **Note** and/or **Highlight** to a document, highlight text then choose your options from the new option box that appears, or click **Add Notes or Highlights** near the top right-hand side of the open document. Notes are accessed via the **Tool Bar** **Document Notes**.



Staying Current

News

Within most library topics, there is a **News** section - except for Tax News which is a first level menu item - that contains WK Daily Reporting Suite products, CCH Report Letters, other newsletters and journals, Daily databases, White Papers, links to CCH Editorial blogs, 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.

The screenshot shows a hierarchical news menu. At the top is 'Banking (Federal)'. Below it is 'News & Current Awareness', which includes 'Banking and Finance Law Daily - Sign Up', 'Banking and Finance Law Daily', 'Advance Release Documents - Federal Banking highlights of significant current events and regulatory activity', 'Bank Compliance Guide Report Summary', 'Bank Digest - Comprehensive daily journal of current events and regulatory activity', 'Banking and Financial Services Policy Report', 'Dodd-Frank News Center', and 'Federal Banking Law Report Summary'. The 'Federal Banking Law Report Summary' item is highlighted with a green background. At the bottom of the list are two documents: 'FEDERAL BANKING LAW REPORTS, No. 2543, (Nov. 8, 2013)' and 'FEDERAL BANKING LAW REPORTS, No. 2542, (Nov. 1, 2013)'.

Tracker News



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

Trackers: Create 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 the trackers you want, click the target icon and customize a search by document type, key word, etc. Click OK.
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 Letter](#)

1. Click [Sign up for E-Newsletters/Report Letters](#).
 2. Select the 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.

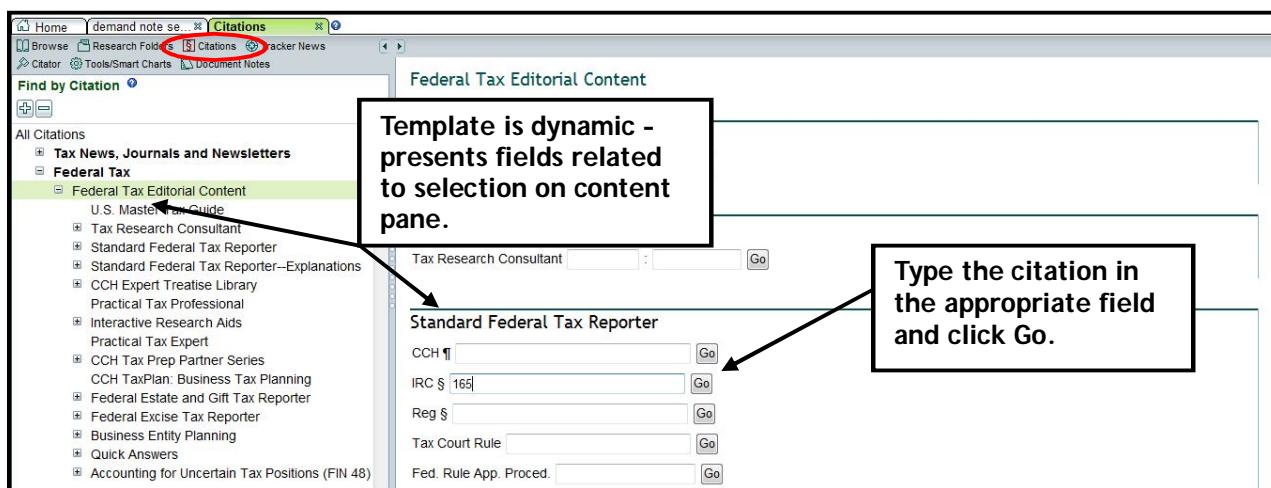


Citations

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**.



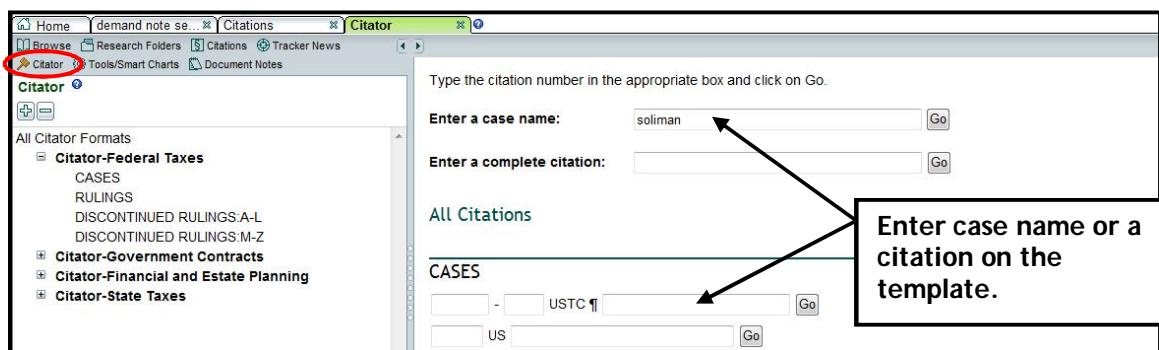
CCH Citator

The CCH Citator is available with subscriptions to **Federal Tax, Financial and Estate Planning, State Tax, Gov't 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



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, Soliman, Nader E.

Soliman, Nader E.

ANNOTATED AT ... [2013FED ¶ 12,523.477, ¶ 14,854.027, ¶ 14,854.94, ¶ 39,651G.305, ¶ 39,652.34](#)

• Sct-- (rev'g CA) [93-1 USTC ¶ 50,014 , 506 US 168 , 113 Sct 701](#)

Ford Motor Company CA-6, [2013-1 USTC ¶ 50,102 , 508 FedAppx 498](#)

Robinson CA-3, [2012-2 USTC ¶ 50,455 , 487 FedAppx 751](#)



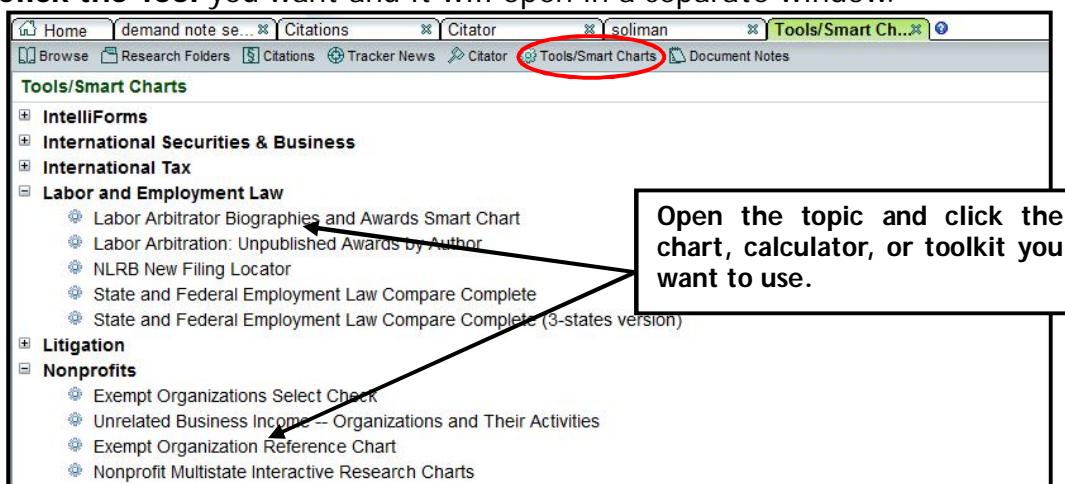
Tools/Smart Charts

Tools/Smart Charts include such items as Smart Charts, calculators, Interactive Research Aids, toolkits, and referral links to other subscription services. Tools/Smart Charts 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.

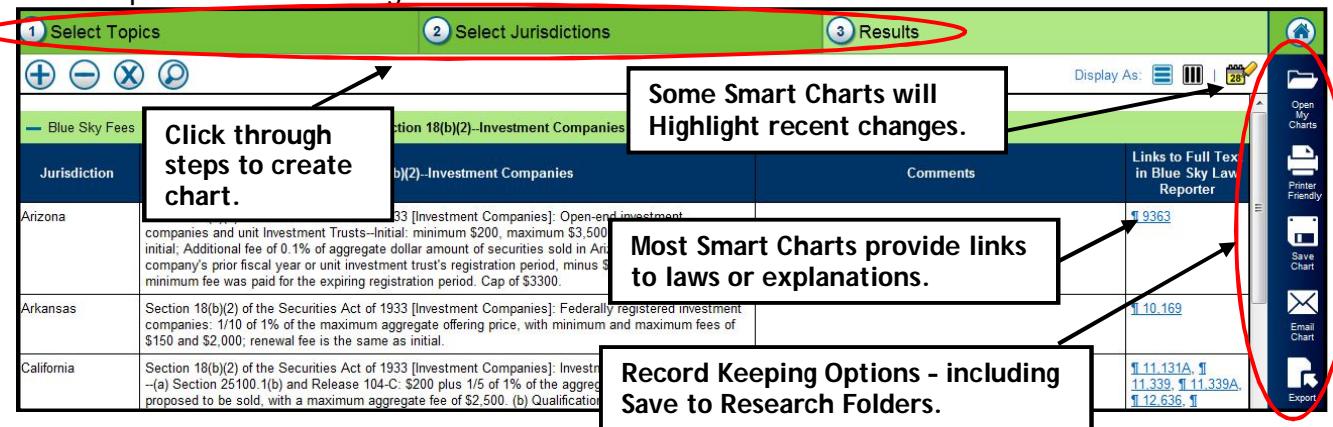
Note: To add a Tool and/or Smart Chart to My Favorites, use the Browse Pane to locate the Tools/Smart Charts and click the My Favorites icon. 

To locate a Tool and/or Smart Chart:

1. Click **Tools/Smart Charts** on the tool bar (or locate Tools/Smart Charts 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 Tools/Smart Charts 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. Smart Charts can be saved to Research Folders when you select that option after clicking Save Chart. Also save chart to a research folder.




History

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

History lists the last 30 days of searches and documents (by default). History can be searched, and you can view up to 1 year of prior searches and documents.

The screenshot shows the IntelliConnect History interface. At the top left is a search bar labeled "Search History" with a red oval around it. Below the search bar are two filter sections: "Filter by History Type" (with "All" selected) and "Filter by Date" (with "Last 30 Days" selected). A large central area displays a list of search results from November 08, 2013, to October 25, 2013. Each result includes a thumbnail, a timestamp, and a brief description. A callout box points to the first result with the text "Click a document to open in Preview pane." Another callout box points to the search results with the text "Search and/or filter your prior searches and viewed documents - up to 1 year of History is available." A third callout box points to the search bar with the text "Click a search to rerun the search and retrieve current search results."

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 and name.

The screenshot shows the IntelliConnect Preferences page. At the top left is a tab bar with "Preferences" (highlighted with a red oval) and "My Profile". The main content is organized into several sections: "Search" (checkboxes for clear search at logout, new tab for each search, and display suggestions), "Search Results" (checkboxes for highlighting search terms and showing excerpts), "Document Preferences" (checkboxes for displaying inline graphics, opening documents in preview pane or full screen, and showing notes and popups), "Date and Time Format Preferences" (dropdowns for date and timestamp formats), "Help Preferences" (checkboxes for displaying information and help icons), "Print/Export/Email Preferences" (radio buttons for document title and URL, and checkboxes for serial or separate printing), "Browse" (radio buttons for tree or library view, and checkboxes for expanding favorites and skipping home page), "Research Folders" (checkbox for showing shared research folders), "Accessibility" (checkbox for enabling screen reader mode), and "Version" (displaying the version number 04.02.01.05.0003). Three sections are circled in red: "Document Preferences", "Print/Export/Email Preferences", and "Browse".



Getting Help

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

The screenshot shows the IntelliConnect software interface. At the top, there is a menu bar with several items: Document Tray [0], History, Saved Searches, Practice Areas, Preferences, Help (which is circled in red), and Log Out. Below the menu bar is a toolbar with icons for Contents, Index, Search, and a Go button. The main window is divided into two panes. The left pane is a tree view of help topics under 'Browsing IntelliConnect Content'. The right pane displays a help article titled 'Browsing your product content' with the following text:
IntelliConnect makes it easy to find information of interest to you by allowing you to browse the product content to which you subscribe. Browsing your product content allows you to quickly drill down through a menu-tree on the left pane of the IntelliConnect interface. As you expand areas of your product content, more focused areas of the content are revealed, allowing you to see the way the content areas are organized.
To browse your product content:

- Click the **Browse** link or icon located on the Quick Bar.

The main **Browsing through your content** page displays, and the menu-tree for your product content displays on the left pane under Browse.
Note: You can easily resize the window panes in IntelliConnect by clicking and dragging the bar that separates the window.

- Wolters Kluwer Law & Business Customer Support** (Toll-free):
Monday through Friday, 8:00 a.m. - 8:00 p.m. (Central)
 - Research & Product Support: **1-800-344-3734** #1 for IntelliConnect
 - Technical Support: **1-800-835-0105**
- Live Chat:** <http://support.cch.com/chat>
- Email:** customerservice@wolterskluwer.com

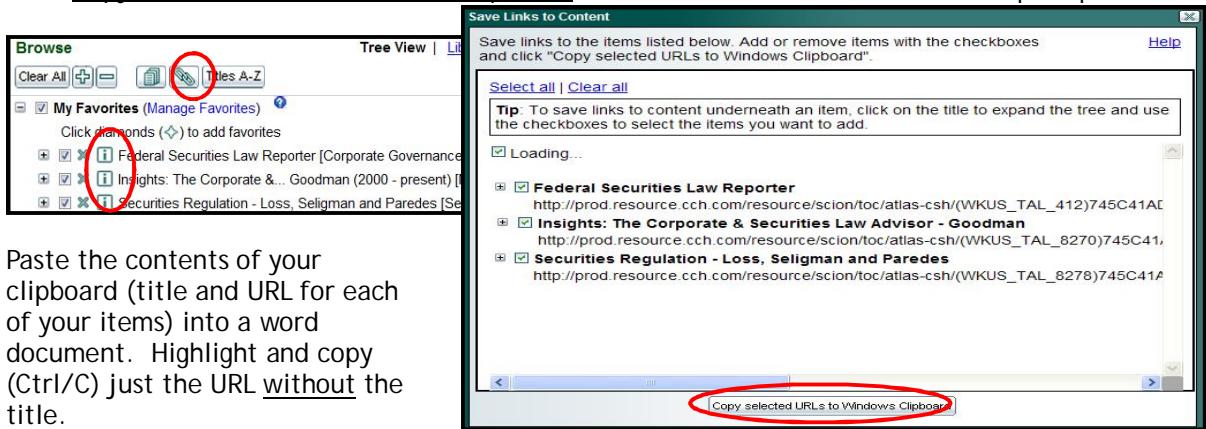
Logging Out

- 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:**
 - Go to <http://intelliconnect.cch.com>
 - Click Favorites on the MS Internet Explorer Browser menu bar.
 - 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:**
 - Within IntelliConnect, locate the content on the Browse menu.
 - Check the box(s) next to the desired content.
 - Click Save Links to Content (the chain link icon)
 - Click Copy selected URLs to Windows Clipboard. Click Allow access and OK if/when prompted.



- 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.
- 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**

- Follow steps 1-6 above
- Open a new Browser window
- Paste URL into the Browser address field and click Go
- Click Favorites > Add to Favorites

- To create a Desktop icon for an item on the MS IE Favorite list:**

- Follow steps 1-6 above.
- Right-click on an empty area of your desktop and select New>Shortcut.
- Where it says "Type the location of the item," paste the URL (from step 6 above) and click Next.
- When prompted for a name, enter a name that is meaningful to you, e.g., "Securities Regulation w/IntelliConnect," and click Finish.
- Close out of the Browser and look at your desktop for the icon you just created as a Desktop shortcut.



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):

spaceimplicit "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.

Use a "?" 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.

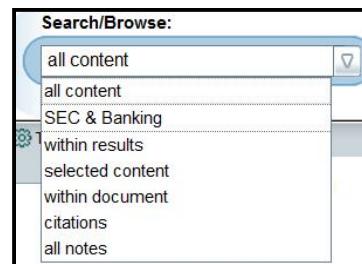
Terms of Art:

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:



- **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.
- **Within 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.
- **All Notes** - search all notes you added to documents.

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.

Search selected content **for**

Thesaurus Apply Thesaurus Synonym Lookup **View Synonyms**

Help

- > Searching Tips
- > Boolean Connectors
- > Exact Phrase Search
- > Thesaurus
- > Search Demo

Limit Search To

- > **Jurisdictions (select):** No Search Limits Applied
- > **Courts (select):** No Search Limits Applied
- > **Date:** Any Day

Example: January 01, 2000

Your Jurisdictions and Courts
restrictions can continue to apply to
subsequent searches until log out or
you click Clear Search Limits.

Apply these search limits to future searches until I log out

Search Now **Apply Changes** **Cancel**

