INTRODUCTION TO THE
CCH® Tax Research NetWork™

Tax & Accounting Libraries

http://tax.cchgroup.com/network

Participant
Training Guide

January 2008
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Introduction

This guide is intended for use in a CCH Tax Research NetWork (CCH TRN) training session conducted by a CCH Legal Training Consultant. It will also serve as a helpful reference tool once the training has been completed. During the training session, you will be introduced to content within your subscription and will learn how to conduct research and find on-point information.

The techniques and methods illustrated in this guide are applicable to all CCH TRN resources. Your CCH TRN subscription allows unlimited usage with no additional fees.

Course Objectives

After completing this training, you will be able to:

- Log in and identify the components of your subscription
- Navigate through publications, topics and documents
- Use three different research methods:
  - Browse through publications
  - Search for documents by keywords and phrases
  - Retrieve documents by citation
- Save your research findings

Agenda

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Logging In

Using User ID and Password:

1. Type the following URL into your browser window: http://tax.cchgroup.com/network
2. Enter your User ID and Password.
3. Click Enter.

Using Internet Protocol (IP) Authentication:

1. Type the following URL into your browser window: http://tax.cchgroup.com/ipnetwork
2. Click Enter.
3. If prompted, type in your e-mail address and click OK.
My CCH

- The **My CCH** tab is where you land when you first login.

- Quick access features include **Run Recent Searches**, selecting a personal **Research Folder**, and customizing the page by creating links to your **Favorite Publications**.

- News features include **Latest News** for specific topics and **Today’s Tracker News**, a daily news service for select publications.
Library Layout

- Contents of your specific subscription components are shown on library tabs.
- You will only see and have access to databases included in your annual subscription.
- There are no additional charges outside of your annual subscription.

► Tip: Click on the to add this publication to your MY CCH tab as a favorite.
Browsing through Menus

Familiarize yourself with a publication’s organization by browsing through menu screens. Move through menu screens to view sub-menus and ultimately retrieve documents.

Click on a menu topic to view underlying contents.

Menu Path indicates your location within the publication contents. You can link to any of the menu levels.

Numbers in brackets represent underlying documents.

Document types are identified by the document label.

Smart Relate buttons link to related material(s).
Preferences: CCH IRN Default Settings

Each User ID is initially set to have default preferences. Prior to conducting a search for key words, it is helpful to review/change the underlying preferences that apply to every search.

To access the current default search options:

1. Click on Preferences.
2. Click on the Set Search Options tab.

To customize your personal search settings:

- Choose a Search Method:
  - All Terms - an "and" connector will be used between each term in the search box to find ALL terms in a document.
  - Boolean Connectors – the search expression will be searched as an exact phrase unless a logical connector is placed between terms: OR, W/#, W/PAR, W/SEN, AND, NOT. These are in order of operation -- you can use parentheses to apply specific processing order to a search.

- Change the Search Results settings:
  - Maximum number of results: default is 200, maximum is 9999
  - Sort by relevance: if this is unchecked, results will be in book/database order.
  - CCH Legal Thesaurus helps you find synonyms automatically

- Users with IP Access should uncheck “Clear recent searches at log out” so the last 20 searches will be saved for re-running.

- Click Apply Changes to save your changes.
Searching by Key Word(s)

Perform a word search to find information in four easy steps:

1. Target desired publication/database(s) at the Library tab level or a sub-menu level.
2. Type your search expression.
3. Click **Search Tools** (optional) to modify search criteria.
4. Click **Search**.

**Tip:** You can target multiple publications within or across sections and/or target entire sections to search at once. Any publication with a checkbox to the left of its title is searchable.

CCH Search Engine Functions:

- Not case sensitive
- Finds singular and plurals
- Force a phrase by using quotation marks if using All Terms Search Method.
- Wildcards:
  - Exclamation point (!) to truncate a word
  - Asterisk (*) to substitute for a single character in a word

**Tip:** Click ‘Clear Selections’ to reset your Search Tools to the default settings and return to the library tab where you started.
Search Tools

Search Tools allows you to change your default search settings for the current search.

Set Search Options: You can customize various search options, such as: the search method (e.g., Boolean), the maximum number of documents to be retrieved, how your results are displayed, and the application of CCH's legal thesaurus.

Narrow Search Results: You can further restrict your search by:
- Limiting by date, e.g., “After 2000”
- Focusing your search within a specific part of a document, e.g., case-name
- Selecting particular document type(s)

You Are Searching: Displays the publication(s) you targeted for the current search.

Search Now vs. Apply Changes
- Search Now - executes the search, same as the Search button at top.
- Apply Changes - returns to the Library tab so you can target database(s). Then click Search button to execute your search using the selected parameters.
Search Results

- **Toolbar** for handling the documents on the list: Export, Print, Research Folders.
- **Terms Searched for** indicates the words/terms the CCH Legal Thesaurus found.
- **# documents** retrieved based on default settings for return Maximum Documents and if Relevance Sorting (ranked order) is applied.
- **Documents** reflect DOC-TYPE, database, title, plus the first occurrence of a keyword.

Documents are displayed in a list by default setting. Change to **Display by Table of Contents – Hits Only** to view results by publication/database. Click the publication to view the menu; click the yellow folder to open the list of documents in that folder.

**Caution:** If you search within a search results list where only the “top 200” documents were returned, you will only search within the top 200 documents (not all). Use Preferences, Set Search Options to change the defaults or use Search Tools to increase the maximum returned (e.g., 9999).
Navigating Options

The Document Toolbar appears at the top of every document and provides various functions for navigating and saving your research.

► **Tip:** As you scroll through a document, the title remains in the Toolbar
**Saving your Research**

Research Folders
Save links to your documents in personalized folders. Links will go to current document.

Store Document
- **Export** - Open/save document(s) as RTF files.
- **Print** – Open separate web frame with text-only view of document(s) which you can then send to a printer or leave open for reference.
- **Mail** – email entire document text or the title & URL, separating multiple addresses with semi-colons.

(IP access users see Caution note below.)

Save Link *
Create links to CCH menus & documents
- **Link Express** – Choose to copy a link or add to your Browser Favorites
- **Favorite** - Add a link to this document to your Browser Favorites.

* Caution: For IP Authentication users, go to Preferences>Display Options and enable “Use IP Login with Link Express URLs” before saving a CCH IRN link.
Finding a Document by Citation

If you already know the citation of a document, use four easy steps to find it.

1. **Target** the desired database containing the document type you are after.
2. Click **Find by Citation**.
3. **Type** a citation into the appropriate document type field.
4. Click the **Search** button to its left.

**Tip:** When retrieving multiple citations, it is best to use Clear Selections so you return to the library tab of your choice and select the appropriate publication.
Using the Citator

The CCH Citator tracks the history of cases and rulings through the legal process. The CCH Citator may be used on the Federal Tax tab to determine whether a case or ruling is still current and whether any other cases or rulings cite to it on the same point of law.

To use the CCH Citator when you know the name of a case or its citation, or the citation of a ruling, use three easy steps to check it.

1. Click on **Check Citator**.
2. Type a **case name or citation** in the appropriate field.
3. Click the **Search** button to its left.

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**Check Citator**

Type the citation number in the appropriate box and click on Search.

- **Enter a case name:** Soliman
- **Enter a complete citation:**

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**RULINGS**

- **Letter Ruling No.:**
- **Notice:**
- **Revenue Procedure:**
- **Revenue Ruling 94**

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**Soliman, Nader E.**

ANNOTATED AT ... 2006FED ¶12,523,477; ¶114,854,027; ¶114,854,94; ¶139,651G,305; ¶139,652,34

- ¶Scτ- (rev CA), 93-1 USTC ¶150,014; 506 US 168: 113 SCt 701: Cl. D. 2054, 1993-1 CB 45
- Sorrentino, CA-10, 2004-2 USTC ¶150,372, 333 F3d 1187
Support

Online Help: For context-sensitive help information, click Help and follow the screen prompts.

Click on our Training & Support tab to:
- Access account-related tools
- E-mail CCH with questions and comments
- Sign up for training
- Print our Quick Start Guide and Quick Reference Card
- Learn more about advanced search tips

Toll-free CCH Research Specialists: 1-800-344-3734
Toll-free CCH Technical Support: 1-800-835-0105
(Monday through Friday, 8:00 a.m. - 6:00 p.m. Central Standard Time)

Web Chat with Technical Support is available Mon. – Fri., 9 a.m. – 5 p.m. CST

To schedule a training session, please contact your CCH Legal Training Consultant or your CCH Sales Representative, or visit our Legal Pro training web site for our schedule of classes: http://business.cch.com/legalprotraining

For more information about our products, please visit us at: www.cch.com
Summary: Using the CCH Internet Research Network

LOGIN URL
- with User ID and Password: http://tax.cchgroup.com/network
- with IP Authentication: http://tax.cchgroup.com/ipnetwork

BROWSING A PUBLICATION / DATABASE
1. Click on the Publication / Database title.
2. Keep clicking on subsequent titles until you get to the document you want.

SEARCHING FOR WORD(S) or PHRASE(S)
After setting defaults in Preferences>Set Search Options, follow the 4-step process:
1. Click the checkbox next to the item(s) you want to search.
2. Type your search terms in the box on the navigation bar.
3. Click the Search Tools button (to change the settings or add criteria).
4. Click the Search button.

FINDING A DOCUMENT BY CITATION
1. On a library tab, click the checkbox next to a publication or database.
2. Click the Find by Citation button.
3. Type the reference number(s) into the appropriate citation format field.
4. Click the Search button to the left.

STARTING A NEW SEARCH
- Click Clear Selections.

NAVIGATING
- Documents in publication order – Nearby Documents: Previous / Next
- Within Search Results List– Search Results: Previous / Next
- Back to Search Results List – Search Results: List
- To Your First Key Word within a document – Search Results: 1st Term

PRINTING – FROM A DOCUMENT OR A LIST
1. Click on Print Text Only.
   From within a List:
   a. Choose Entire Documents, Titles Only, or Titles & URLs.
   b. Check the box for ‘Yes, convert the first # documents’.
2. Information appears in a separate web frame. Click Yes to Print or Cancel.

► Tip: Periodically delete your Temporary Internet Files on Microsoft’s Internet Explorer browser. From the browser menu bar, click Tools, choose Internet Options, and click on Delete Files. This will ensure that your Back button works without error.

CCH RESEARCH SPECIALISTS: 1-800-344-3734
CCH TECHNICAL SUPPORT: 1-800-835-0105
8AM-6PM Monday through Friday, CST