IntelliConnect™

Participant Training Guide

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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 CCH and Aspen Publishers with sophisticated Internet technology to save you time and streamline your workflow.

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

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 CCH libraries.

Your subscription allows unlimited usage with no additional fees.

Objectives

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 record keeping options
- Use product-specific tools

Agenda

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Logging in

To log in to IntelliConnect from Microsoft Internet Explorer Browser:

1. Go to http://intelliconnect.cch.com
   You can add this URL to your firms’ Library page or MS IE Browser Favorites (see Appendix A).
2. Enter your Registered User ID (your email address) and password.
3. Check boxes to remember ID and password and to log in automatically.
4. Click Log In.

Home Page

Home returns you to this page.

Search Scope allows you to select a search mode to limit the scope of your search.

The Search Bar is always available so you can search at any time.

Menu Bar includes links to helpful features.

The Quick bar contains handy links to key research tools.

Help getting started and access to support information available right when you sign in.

Banners alert you to new products, special features, and more.
Customizing Practice Areas

Your subscription content within IntelliConnect is organized under categories called Practice Areas. You can determine what content you will see in the Browse tree and what content will be included when you conduct an “all content” search.

To select or change your Practice Area:

1. Click Practice Areas on the Menu Bar. You will only see the Practice Areas available within your subscription contents.
2. Click + to open the main content area of interest, e.g., Legal Professionals
3. Select the library or libraries of interest and deselect what you don’t want to see. By default, all Practice Areas will be selected upon initial login.
4. Click OK.

- You can select a main category containing various libraries or narrow the focus to one library. Libraries will have a number of publications and databases that you will see when you open the Browse tree.
Browsing

Every library, publication, database and tool in your subscription, within your selected Practice Areas, is available in the Browse tree. This structure enables you to navigate through successive levels of content hierarchy.

To access the Browse tree:
1. Click the **Browse link on the Quick Bar.**
2. Click through the Browse tree to see the items in your subscription. You can “drill down” to documents. When you click a document, it will display on the right.

- **My Favorites:** Add links to frequently used publications to My Favorites for quick access. Click the star next to the desired publication or database. Then open My Favorites (at the top of the Browse menu) to access that publication in the future.
- You can create a link on your Microsoft IE Browser Favorites to a specific publication. See Appendix A, page 17.
Searching Selected Content

You can focus searches to specific items in your subscription such as a particular publication or subsections of a publication.

To browse to a section and target for searching:

1. Locate the desired area in the Browse tree by clicking on the + and – icons to expand and collapse items.

2. When you have located the item you wish to search, click in the checkbox next to the item. Note that the search scope in the search bar changed to “selected content”.

3. Type search terms in the search bar at the top of your screen. Reference Appendix B, page 18, for Search Tips.

4. Click Go.

- 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 tree.

- To collapse the Browse tree, clear all selections, and close all search tabs, click the Refresh command in your Browser. (MS IE Browser command: View > Refresh or you can hit the F5 key.)
Searching All Content

An “all content” search searches all of the content within your selected Practice Areas. This is a great way to collect all documents from various sources on a topic.

To conduct a search across all available content:
1. **Type** search terms in the search bar at the top of any screen -- verify that search scope is showing “all content.”
2. **Click Go.**

You can conduct another “all content” search by leaving the scope as is and entering a new search phrase. The results will appear on a new search tab.

You can change the scope to “within results” and enter different or additional words in your search phrase to search within these results. The results list will change on this tab. All keywords from first and second search will be highlighted in the documents.
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 five search tabs at any time.

  - **At the bottom of the results list you can change the number of results per page and navigate between pages of results.**

  - **Sort by: Relevance | Most Recent:** Relevance is the default display for search results. You can select Most Recent to view dated documents (cases, rulings, etc.) in reverse chronological order.

- **Narrowing Your Search Results:** The left pane lists the filters you can apply to narrow your results to documents of interest. You can “filter” by Document type, Library/publication, Practice Tool, State Tax Type, or Jurisdiction (depending on results retrieved).
Viewing Documents

To view a document on 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.

- **Maximize or open new window**: You can open documents in their own windows so you can easily view and read the document and you can view multiple documents simultaneously.

- **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 tree.

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

Send to Tray
- Document Tray temporarily holds documents. Once in the Tray, you can print it, save it to a file, or save it to a Research Folder. These documents will be removed when you log out. Tray holds up to 50 documents.

Save/Email
- You can save any document or items from a document list. Just click Save/Email on the tool bar and choose to save as text or a PDF. The text version will save as *.RTF file. The PDF version will retain all of the formatting of the document.
- You can copy a link to a document and then paste it into a different application.
- You can email any document. Just click Save/Email on the tool bar. Select Email Document, and then type in/select the email address you wish to send the document. Document is an attachment by default -- see Preferences for email options.
- On a Search List, you can save the search scope and search expression to Saved Searches. Access Saved Searches from Search Options.
- You can save links to a document or selected items on a list to Research Folders to store documents you want to keep for later use. You can access Research Folders at any time by clicking Research Folders on the Quick 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.

Print
- You can print any document or documents on the search results list. Just click Print on the tool bar and select to print a text version or a PDF version. The PDF version will retain all of the formatting of the document and embedded links.
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, newsletters and journals, Tracker, 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

Tracker News helps you keep on top of the news. You can set up custom searches specific to your areas of interest and access results within IntelliConnect or have them delivered to you via email or RSS feed. You can also customize whether you want your Tracker emails to contain brief excerpts of stories (along with the story headlines) and links to the full-text versions of the stories.

To set up a tracker:
1. Click Tracker News on the Quick Bar.
3. Click “here” (if there are no Trackers) or Add/Modify Trackers to open the list of available Trackers.
4. Select the tracker(s) of interest from the list and click Add Tracker(s) at bottom of the display. Note: You can narrow the tracker search to a specific document type or other criteria. To look at customization options, click the target icon.
5. To select type of delivery and email formatting, click Delivery Options at the top of the Tracker list.
Citations

You can use the Citation template or the “citations” search scope to retrieve a document if you know its exact citation.

To find a document using the Citations Template:

1. Click on the Citations link in the Quick Bar.
2. In the left panel, click ‘+’ to expand the library/publication categories for the document you want to retrieve. When you click on a category title on the left, the templates for that category appear on the right.
3. Scroll through the templates on the right to find the correct template for your document type and citation.
4. Type the document number or citation in the template box(es).
5. Click Go next to the citation you entered.

To find a document using the search scope for citations:

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

The citation must be specific. Examples for Practice Areas: Tax: s165 (retrieves code section from Standard Federal Income Tax Reporter whereas IRC165 will retrieve code section from the Internal Revenue Code database); s1.1001-1. Securities: sec form 10; 17cfr 229.301; 15 USC 78n. Medicare cases: 525 u.s. 249. Labor & Employment: 29 cfr 1640.
CCH Citator (Federal Tax, State Tax, 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 Quick 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 list in the right pane to find the specific document type you wish to retrieve.
5. Enter the needed information for the **citation in the template box(es)** (e.g., paragraph, section number, etc.). 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.
Practice Tools

Practice Tools include such items as Smart Charts, calculators, Interactive Research Aids, and toolkits.

To locate a practice tool:

1. Click on **Practice Tools on the Quick Bar** or click on Browse and then the selection for Practice Tools.
2. Click the **+ for the topic**. (The Tools displayed will be restricted by the Practice Area selected.)
3. **Click the Tool** you want and it will open in a separate window.
History

History lists the last 20 searches and 20 documents from your research activity during the last 60 days. To continue to save documents in History past the 60-day time period, you can copy or move those documents to Research Folders or save the documents as Text or PDF files.

Preferences

IntelliConnect includes a number of Preferences you can set to further customize your research experience: Search Preferences, Document Preferences, Help Preferences, Print/Export/Email Preferences.

Change ID, password, name.
Getting Help

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

  ![Menu Bar](Image)

  - Document Tray [0] | History | Practice Areas | Preferences | Help | Log Out

- To access support information, click **Home > Training and Support > Phone:**
  - **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. – 8:00 p.m. Central Standard Time
    
    Web Chat with Technical Support is available Mon.-Fri., 9a.m. – 5p.m. CST
  
  - Go to: [http://support.cch.com/intelliconnect](http://support.cch.com/intelliconnect)

  - To access a User Guide: click **Home > Help/Getting Started > User Guides**

Logging Out

- Click **Log Out** on the Menu Bar when you finish your research session.
Appendix A: Create Browser Favorites and Desktop Icons

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 a specific publication or document to your MS IE Browser Favorites:
1. Click Browse to locate the publication or document.
2. Check the box in the Browse tree next to the desired publication.
3. Click Save Links to Content (the chain link icon)
4. Check the box for the URL you wish to copy. (If you selected a section on the Browse tree, you can browse in the Save Links window to select multiple URLs.)
5. Click Copy selected URLs to Windows Clipboard.
6. Paste the URL into a word document. Copy the link without the title.
7. Open a new Browser window. Paste the URL in the Browser URL field and click Go. Then click Favorites to add it to the list.

To create a Desktop icon for an item on the MS IE Favorite list:
1. Click Favorites and locate the desired item.
2. Right-click on it then click ‘Send to…’ and choose Desktop (create shortcut).
3. Close out of your browser and look at the desktop for the icon titled IntelliConnect or the specific publication you created as a Favorite.

Note: when using an external link or Browser Favorite to access specific material within IntelliConnect, the Browse tree 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. However, if you type in a Boolean operator such as “OR” or a proximity connector such as “w/par,” 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.

- **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/sen……”rule 506” w/sen exempt*
  - w/par…….”audit committee” w/par controls
  - and………..churning and rule 10b-5
  - not………..rico not Puerto

- **Parenthesis** can be used to override the order of precedence

- If using a proximity connector, you can no longer use space for implicit ‘and’ – you must enter the connector ‘and’ between words where needed.

- **Use quotation marks to force a phrase:** “incentive stock option”

- **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.

  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.
Search Scope

Search Scope allows you to select a search mode to limit the scope of your search:

- **all content** – searches all of the content in your selected Practice Areas. This is the default selection.
- **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 tree.
- **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.

Search Options

- To add a date restriction to your search when searching through dated documents, e.g., news, cases, rulings, no-action letters, etc.
- To preview or turn on/off the Thesaurus (on by default).
- To access Saved Searches. When you “Save search terms and scope” on the search list tool bar, your saved searches can be viewed, re-executed, or deleted from here.