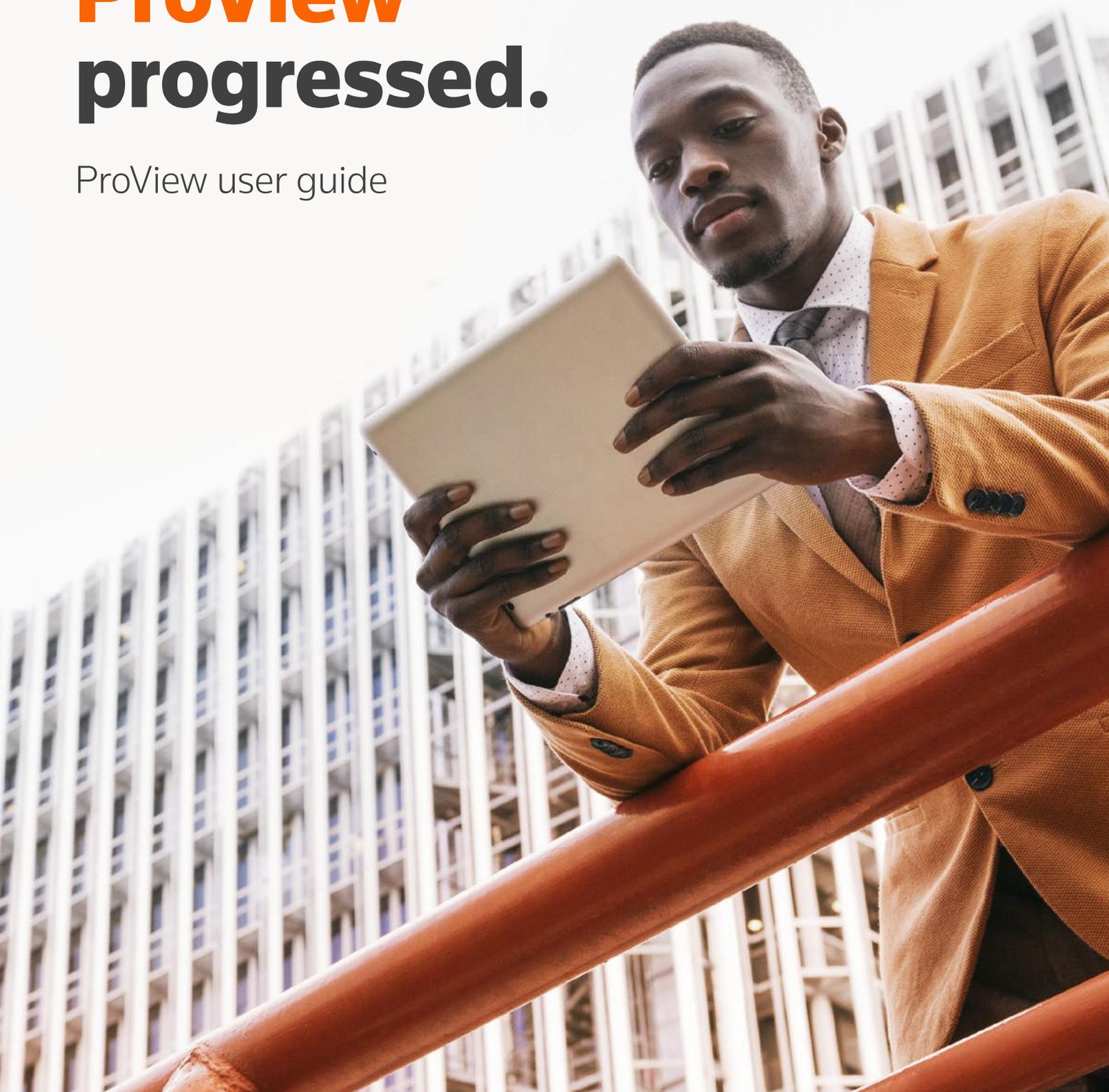


Professional. Productive. **ProView** progressed.

ProView user guide



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Overview

Within this user guide you will find everything you need to successfully start using the new browser-based ProView platform.

With ProView's transition to a responsive browser-based platform, you no longer need to install software. You are now able to enjoy a consistent experience and access your library of content both online and offline on a wider array of devices.

Getting started

Using your browser

Log into ProView at:

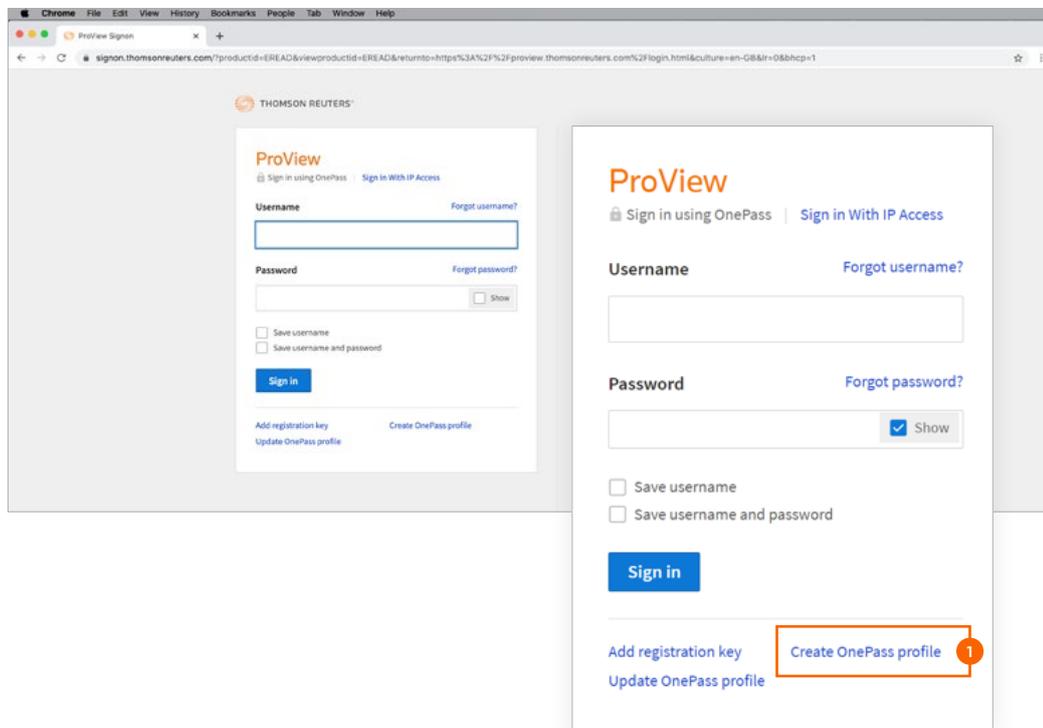
<https://next-proview.thomsonreuters.com>

For the best experience, we recommend using the Chrome browser.

Logging in with OnePass

You can access the new ProView web app with your existing OnePass credentials.

If you are a new ProView user, you must first create a OnePass profile (if you don't already have one) and add your ProView registration key before you can begin using your ProView titles. The ProView login screen includes a link to create or update a OnePass profile.

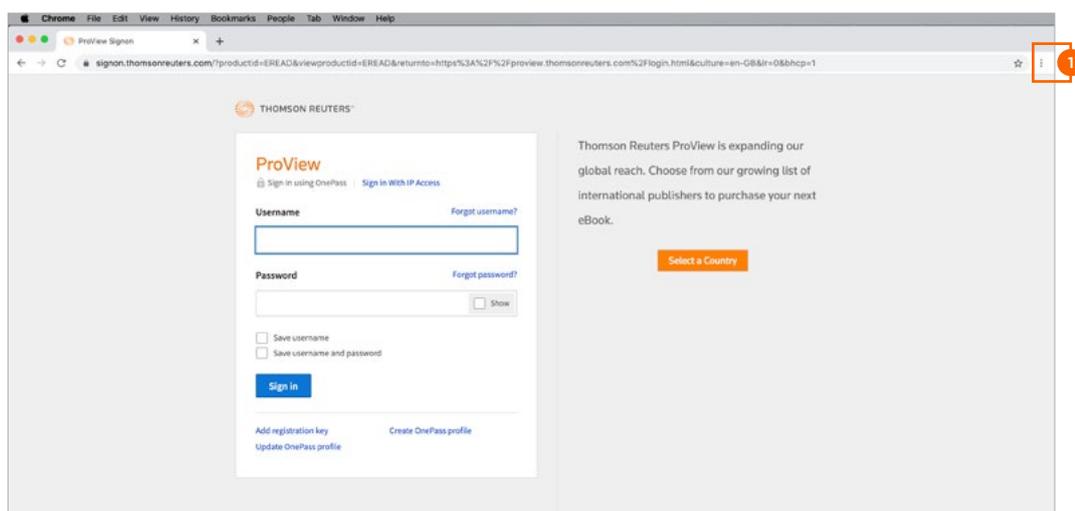


1 You can create your OnePass profile here.

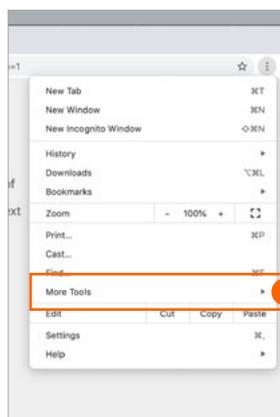
Getting started

Creating a shortcut to ProView on the web

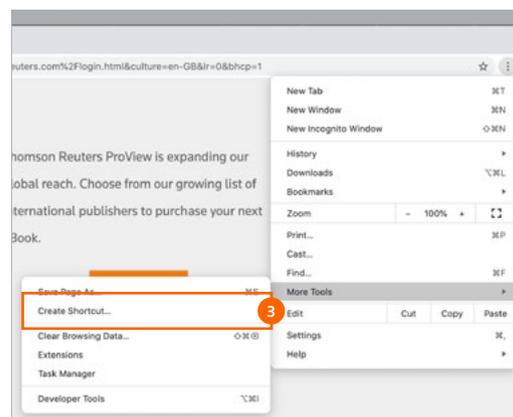
If you prefer to access ProView on desktop or on a mobile device by selecting or tapping an icon, you can create a similar experience for the web app. How to create a shortcut to the web app in Chrome:



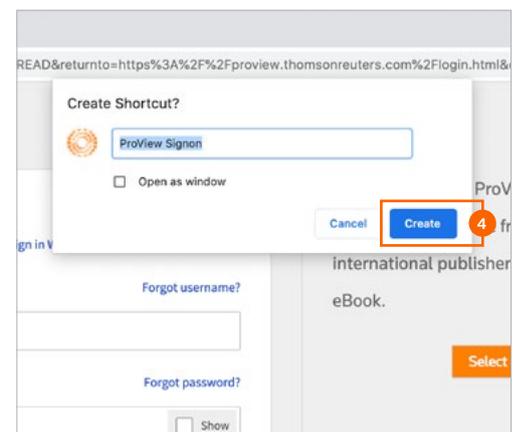
1 Navigate to ProView library screen and select the '⋮' icon in the upper right corner of the screen.



2 Select 'More Tools'.



3 Select 'Create Shortcut'.



4 Select 'Create'.

Library features

History

Titles you have read recently are shown in the history drop-down menu so you can return to them quickly. Accessing a title from the history panel will take you to the last place you visited within that title.

Notifications

This feature alerts you each time a title is updated in your library or a new title is added to your library account. Titles can also be accessed by selecting on the image from within the notification panel.

Account

Select languages, access our contact information and privacy policy, refresh your library, export a list of titles, clear ProView cookies and sign out.



1 Screen location of 'History', 'Notifications', and 'Account' icons.

2 Close-up view of icons.

Library features

Your ProView titles

Each title in your library is represented by a title card, including a cover image, publication title and author details.

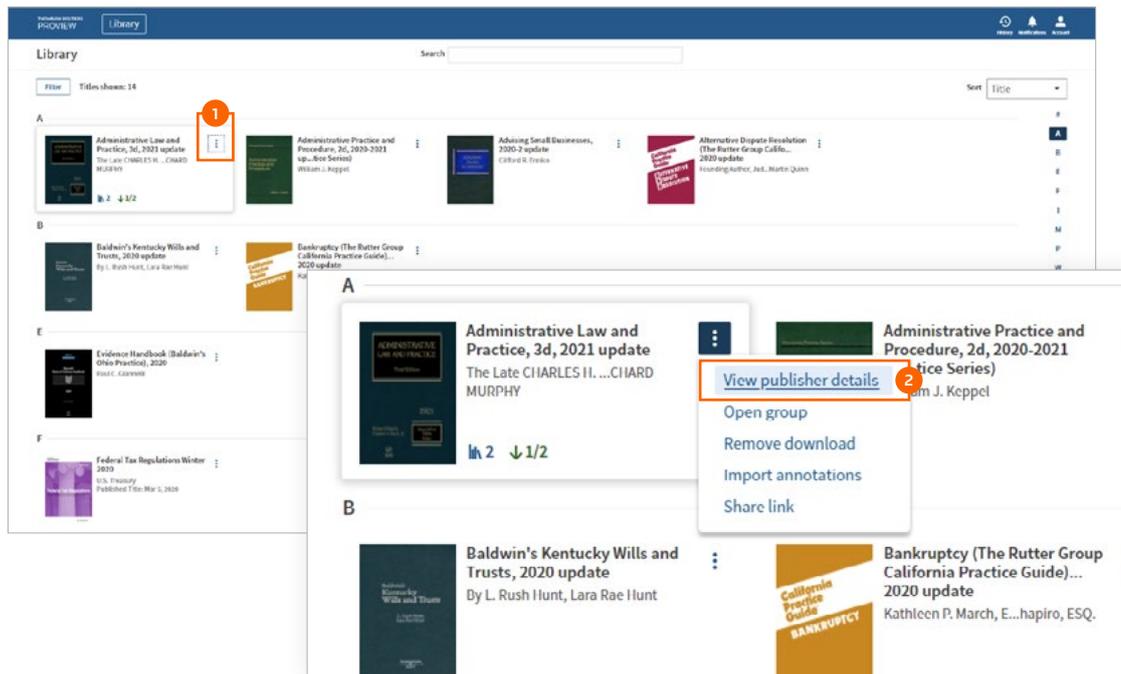
The screenshot shows a library interface with a search bar and a list of titles. The first title is '1040 Quickfinder Handbook 2020' by Quickfinder Editorial Staff, published Feb 3, 2021. The second title is '2020 Federal Tax eBook' by RIA Editorial Staff, published Jan 31, 2020. A callout box highlights the '2020 Federal Tax eBook' card with the following annotations:

- 1 Title card.
- 2 Cover image.
- 3 Publication title.
- 4 Author details.

Overflow menu actions

View publisher details

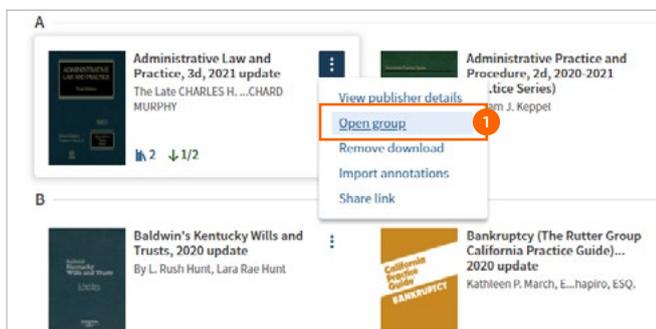
To learn more about a title, select 'View publisher details' from the overflow menu. A publisher details pop-up box will appear with additional publishing information.



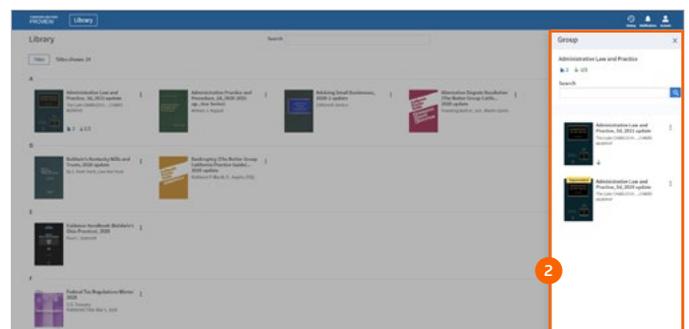
- 1 Overflow menu button.
- 2 View publisher details.

Open group

If available for your publication, you can access other titles included within a group by selecting 'Open group' from the overflow menu. From the group panel, you can also run a search across the titles in that group.



- 1 'Open group'.



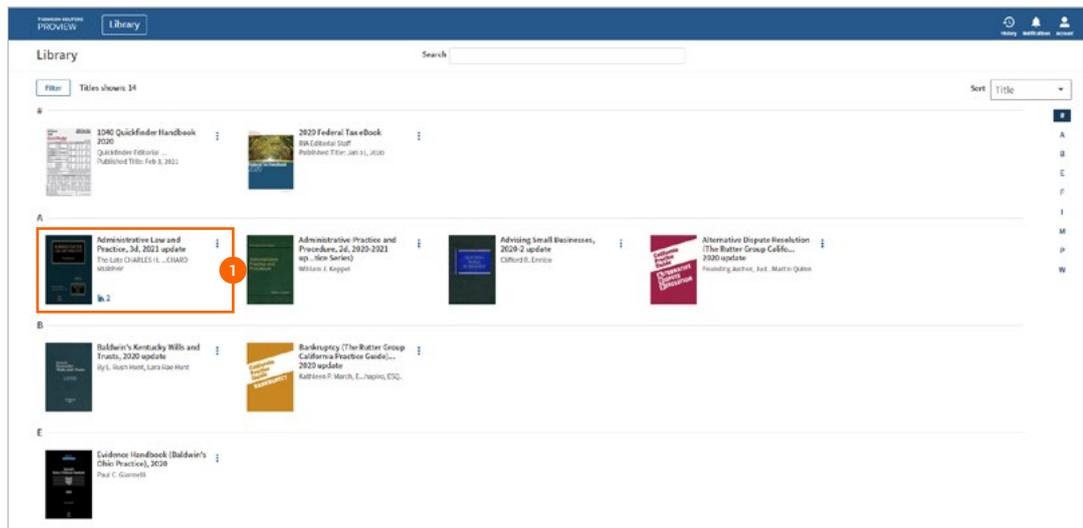
- 2 'Open group' slide out menu bar.

Overflow menu actions

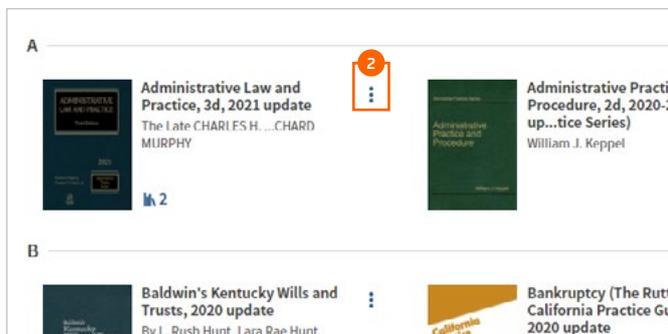
Download a title

Titles can be downloaded for offline use from the library or from within a title.

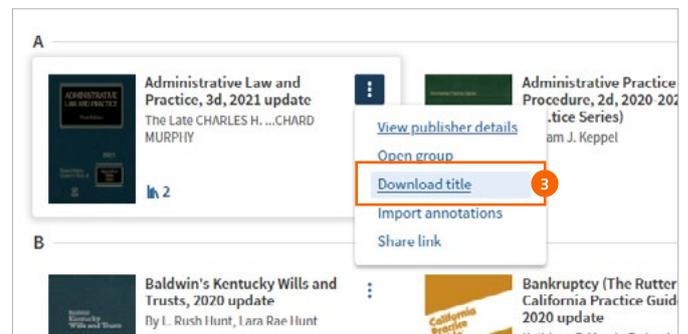
To download a title from the library:



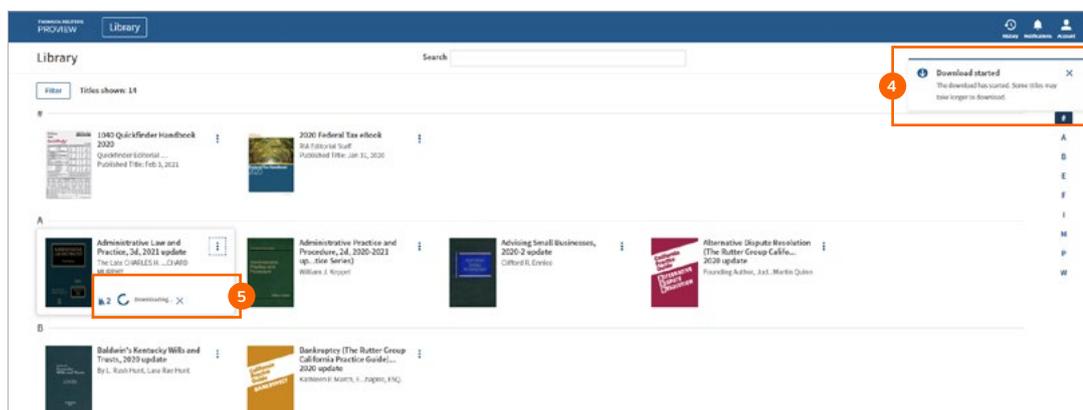
1 Find the desired title.



2 Select on the overflow menu in the upper right corner of the title card.



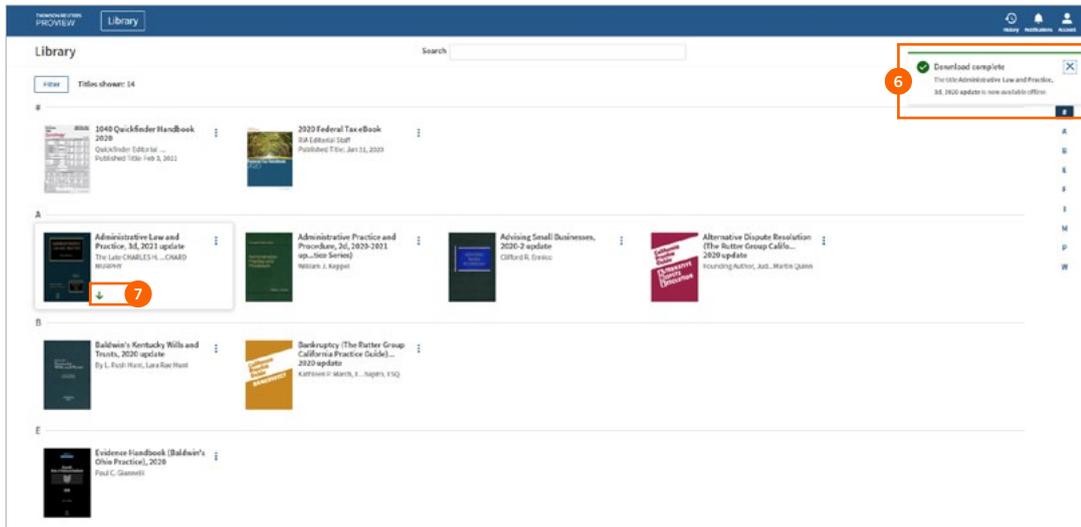
3 Select 'Download title'.



4 An alert will appear in the upper right corner indicating that the download has started.

5 The title card also displays a spinner to indicate a download is in process.

Overflow menu actions



6 An alert will appear in the upper right corner indicating that the download is complete.

7 The title card also displays a green arrow.

Note that several factors can impact the time it takes to download a title, including:

- Computer processor.
- Computer memory.
- Network strength.
- Size of eBook.
- Number of simultaneous downloads. (Up to 2 from library only)
- Running library or title searches during download.

For longer downloads, an alert appears every 2 minutes to remind you that the download is still in progress. An additional alert will display if you attempt to logout while the download is in progress.

Import annotations

For details on how to import annotations, please see page 27.

Overflow menu actions

Share link

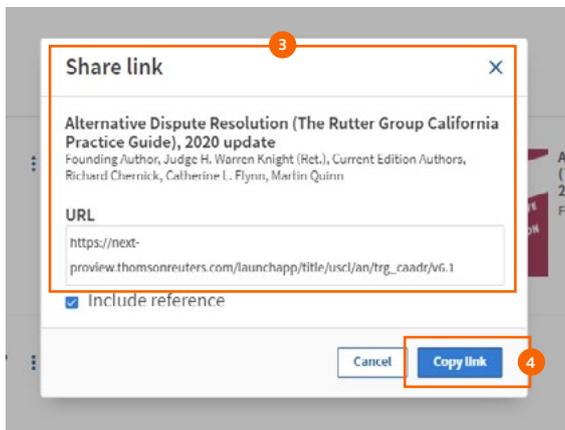
Choosing 'Share link' from the title card overflow menu opens a dialogue box with a link to the title that you can copy and paste into an email or document to share with a colleague. Note that recipients of the link must be ProView users to have access to the same title.



1 Select the source title from the list of titles by selecting the title in the list.



2 Select on the overflow menu, and select 'Share link'.



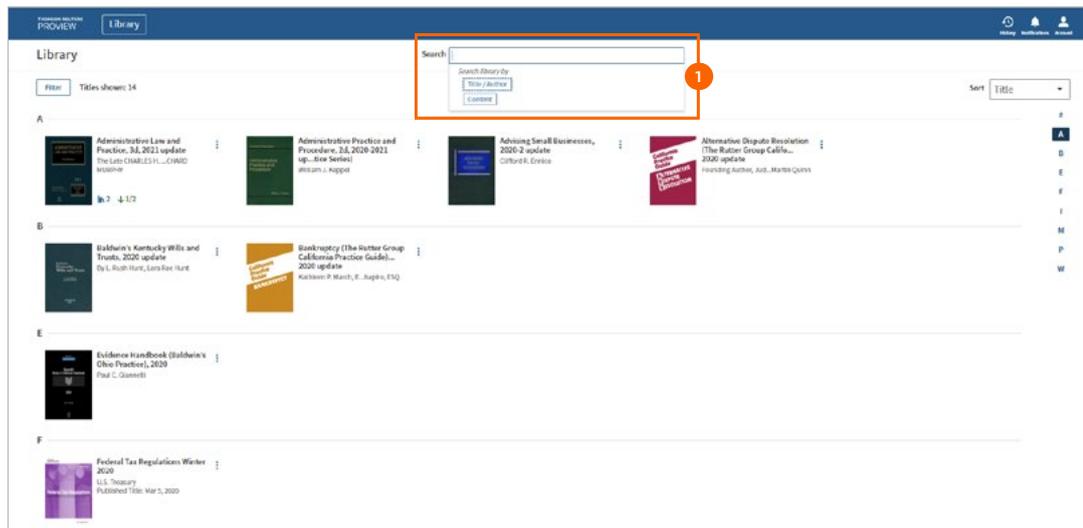
3 Share link dialogue box. URL link provided.

4 'Copy link' button.

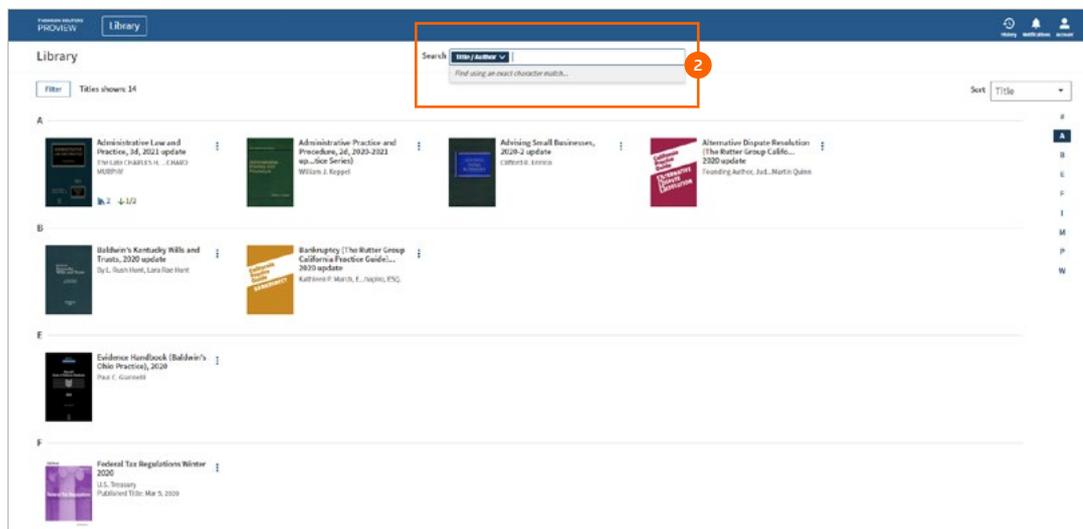
Library navigation

Author/Title filter

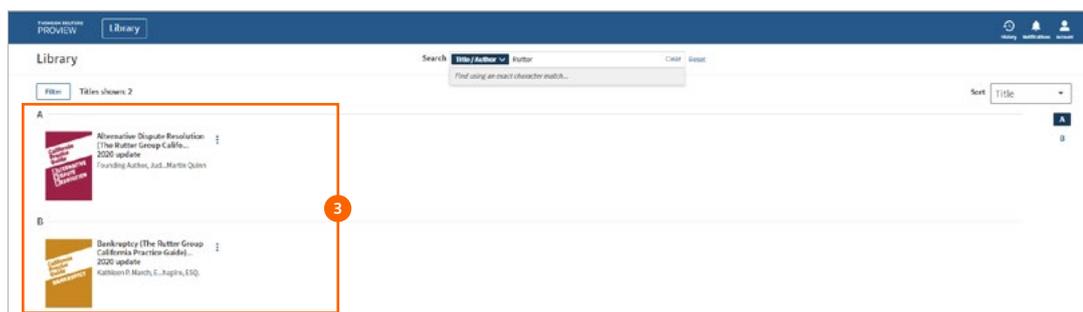
Quickly find a title by author or title by entering text in the search bar at the top of the library. The title/author filter is looking for an exact match of the characters entered and will filter your library to display only titles that contains those characters in the author or title name of the publications in your library.



1 Select into the 'Search' bar. You can select which library you want to search in.



2 Enter text in the 'Search' bar.

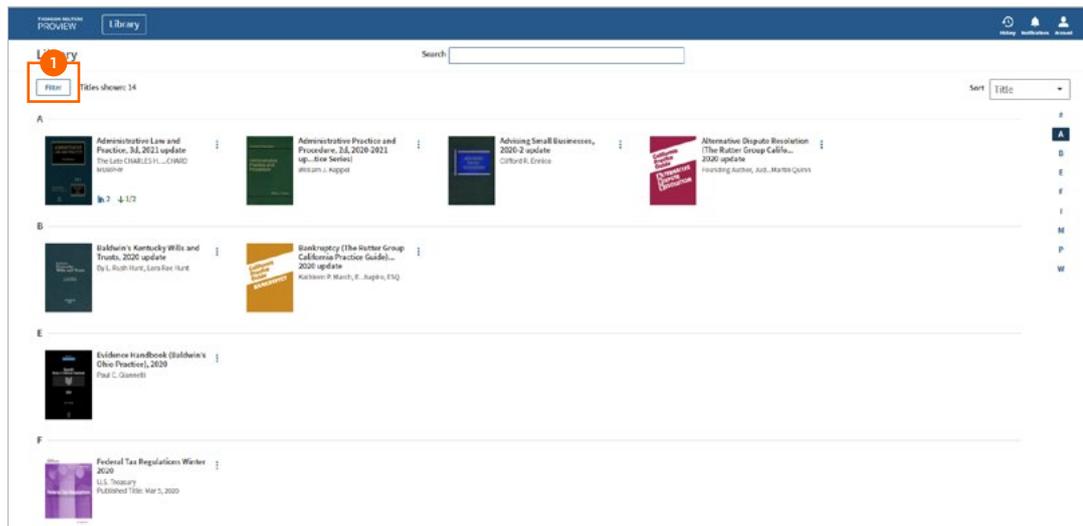


3 'Title/Author' matches will appear below in a list.

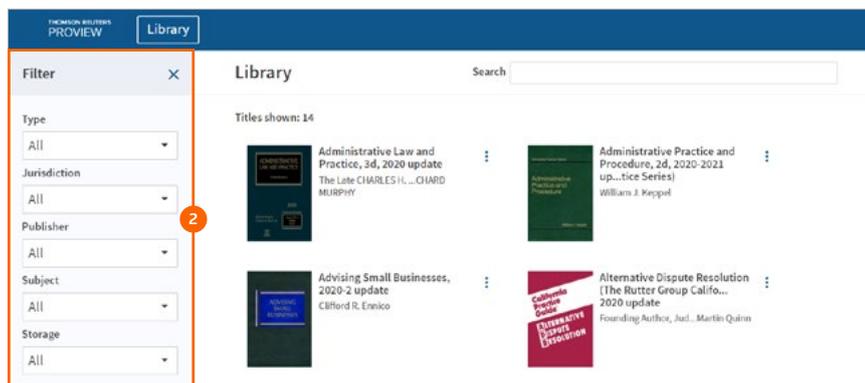
Library navigation

Filter panel

The library filter panel defaults to open when you enter the library. Once closed, you can access the filter panel by selecting the 'Filter' button on the top-left of the screen. You can apply filters to your library to help you quickly identify relevant content. Library filter options include jurisdiction, publisher, subject and storage.



1 'Filter' button.



2 Filter library open.

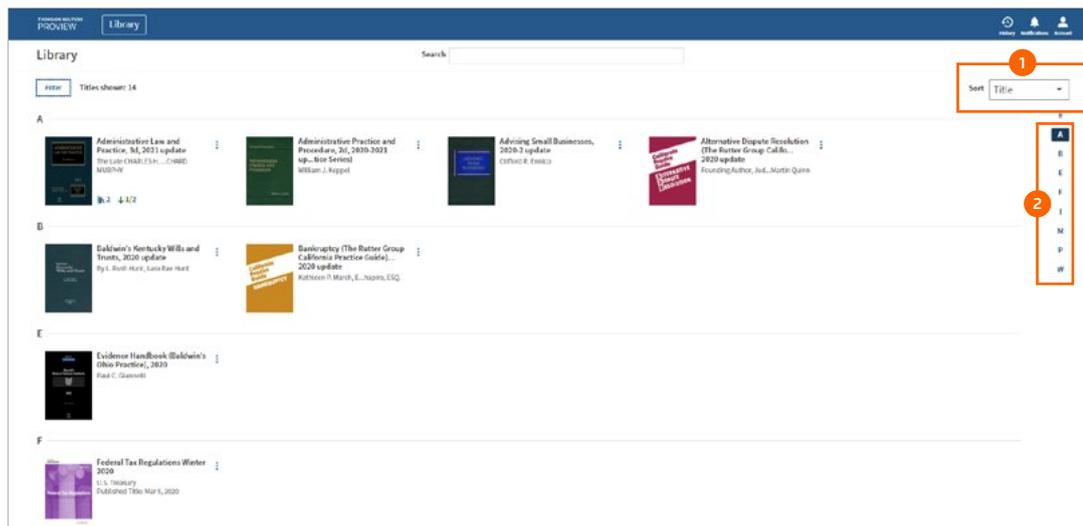
Library navigation

Library sort

Above the A-to-Z navigation on the right-hand side of the screen is the option to sort the library. Sort options are, by title, type, jurisdiction, publisher, subject and ownership. The title name is the default sort order for the main library.

A-to-Z navigation

A-to-Z navigation is offered down the right-hand side of the screen. It is scrollable using the arrows at the top and bottom of the panel. Letters can also be selected to quickly jump to that section of titles.



1 Library 'Sort' menu.

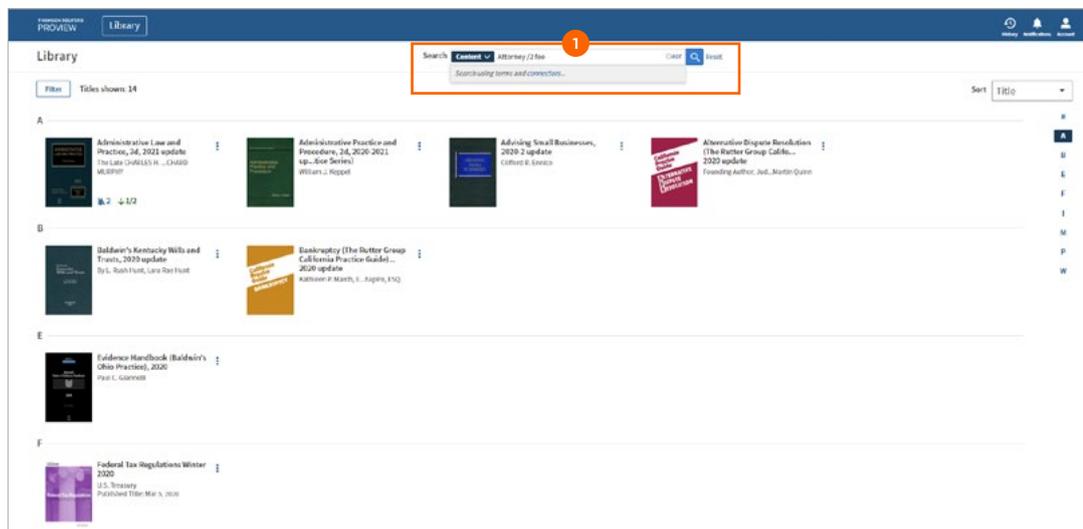
2 A-to-Z navigation.

Library navigation

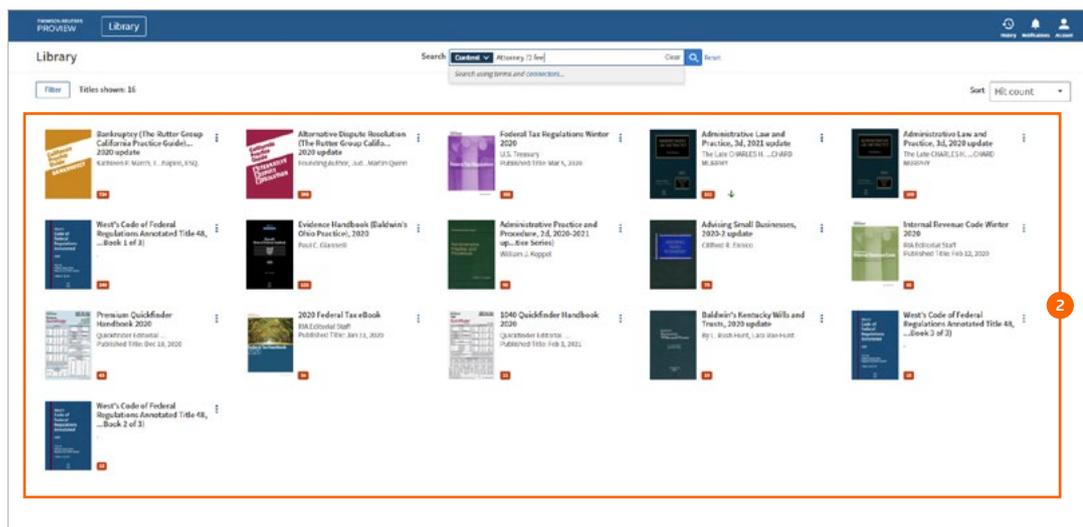
Library search

You can search across the full text of all the publications in your library by selecting 'Content' from the search bar at the top of the screen. You can search using terms and the following connectors:

- & AND
- | OR
- "" Phrase
- % BUTNOT
- /n Within n terms of
- +n Preceding within n terms of



1 Search bar/Content.

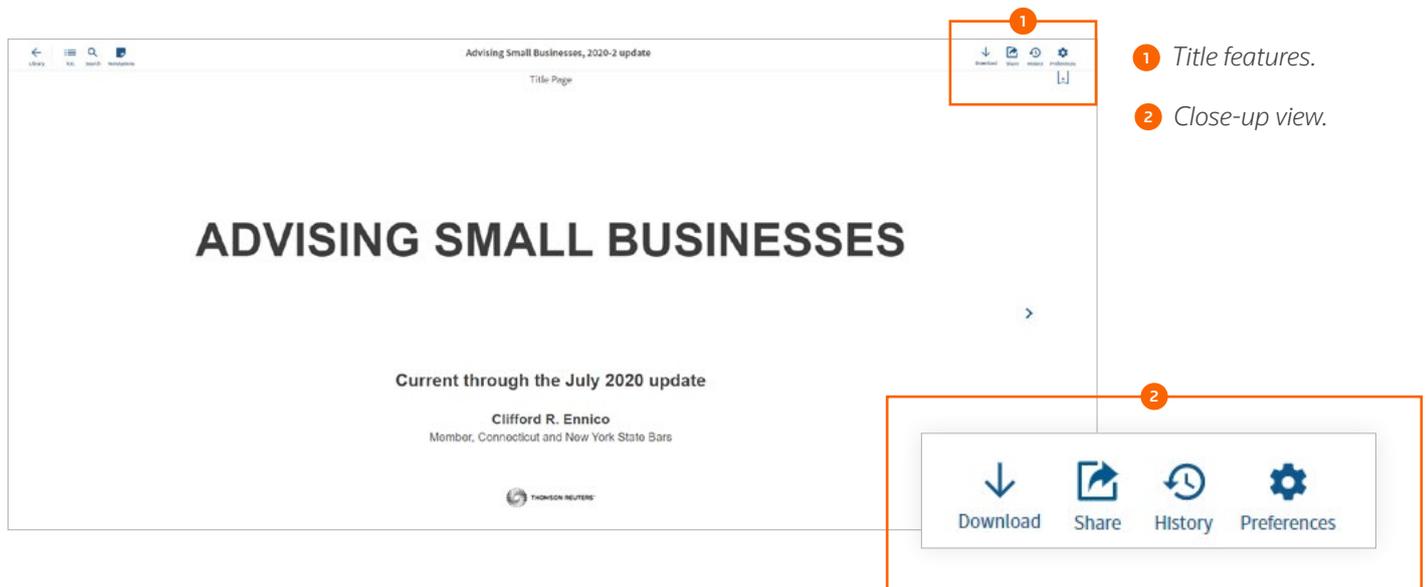


2 Choosing a title from result list will open title with search results displayed.

Title features

Title features

Title features can be accessed by using the navigation bar menu on the right-hand side at the top of page.



User preferences

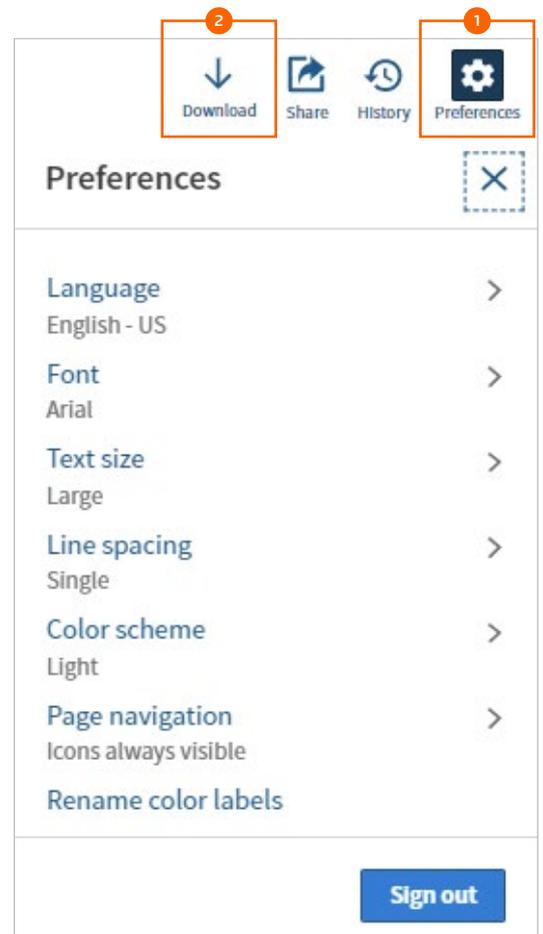
Within a title, access your user preferences by selecting the gear icon in the top-right corner of the screen. Language, font, text size, line spacing, colour scheme, and page navigation are all customizable. Within user preferences, you can assign project names to each colour label to allow you to easily organize your bookmarks, notes, and highlights by project.

Download

You can download a title while it is being viewed by using the 'Download' button in the top-right corner of the screen.

1 'Preferences' icon.

2 'Download' icon.

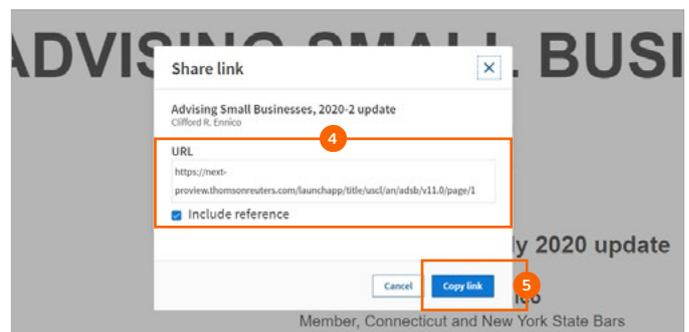
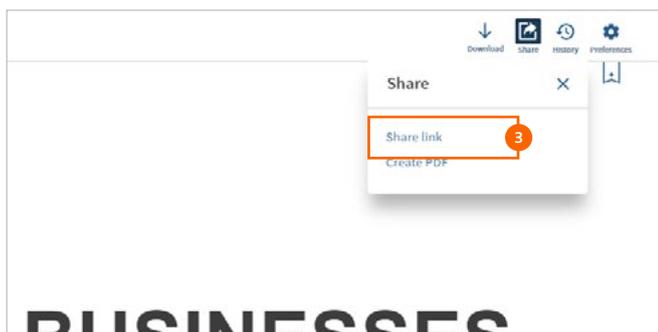


Title features

Share feature

The share feature allows you to easily share content by creating a link to share with another ProView user or by generating a PDF to print or email.

From the 'Share' icon select 'Share link'. ProView provides a summary of the content location within the title in addition to the link. Share the link via email, text message, or with other applications on your device. The link recipient simply taps or selects the link to open the title to the referenced section. Recipients of the link must be ProView users and have access to the same title.



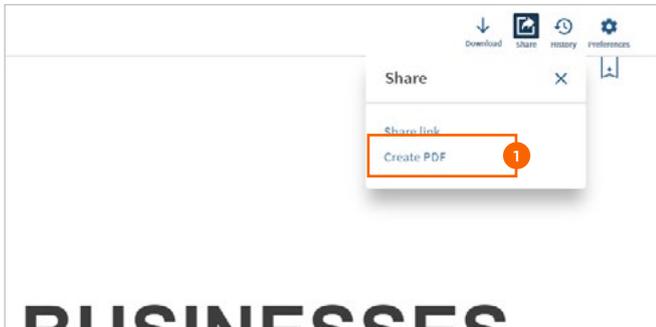
3 'Share' link.

4 Share link dialogue box. URL link provided.

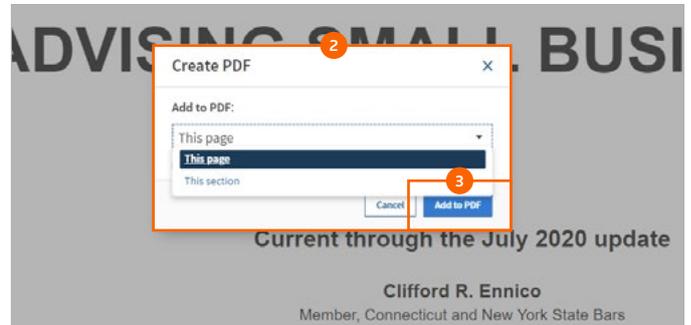
5 'Copy link' button.

Title features

Choosing 'Create PDF' opens a dialogue box to add the current section to a PDF.



1 'Create PDF' button.

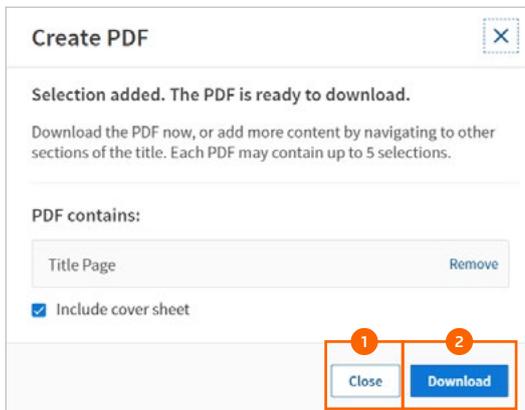


2 PDF dialogue box.

3 Add to PDF' button.

After selecting 'Add to PDF', you can generate the PDF immediately by choosing 'Download' or choosing 'Close' to download later. You must be online to use the 'Create PDF' feature. You can add up to five sections to a single PDF.

You will be alerted if you attempt to leave the title before generating your PDF.



1 'Close' button.

2 'Download' button.

3 Alert message.



Title navigation & search

Using the table of contents

Selecting '+' to the left of the heading expands the section, selecting '-' collapses the section.

Use the filter box at the top of the table of contents panel to search for key words in the section headings of the table of contents.

Selecting the icon to the right of the heading displays the location of the heading within the hierarchy.

1 '+' / '-'.

2 Filter box.

Library TOC Search Annotations

Table of contents X

TOC

Filter table of contents

E. Claims Subject to Arbitration (Arbitrability)

F. Arbitration by and Against Nonsignatories

G. Procedures to Enforce Arbitration

H. Conduct of Arbitration Proceedings

I. Arbitrator's Award

J. Challenging and Enforcing Arbitrator's Award in Court

K. Arbitration of International Commercial Disputes

1 + Chapter 6. Private Judging

+ Chapter 7. Disclosure and Disqualification

+ Chapter 8. Drafting ADR Agreements

+ Appendix

Title navigation & search

Filter the table of contents

You can also filter the table of contents. Matching table of contents terms will display as you type. Selecting a specific section will take you to that page.



1 Add in your term.



2 Select specific section.

The icon to the right of the heading displays the location of the heading within the hierarchy.

Title navigation & search

Online search

Selecting the magnifying glass icon in the header opens the search panel. Begin typing in the search box. ProView supports the following:

- Key term search
- Phrase search (two words separated by a space will be searched as a phrase)
- Terms & connector search (connectors: & AND, | or, " " phrase, % BUTNOT, /n and +n)



1 Magnifying glass icon.

2 Type key term to search.

Offline search

Offline search works differently than online search. Offline search does not use the same capabilities, so there will be differences in the search results when searching offline versus online.

Offline search functionality:

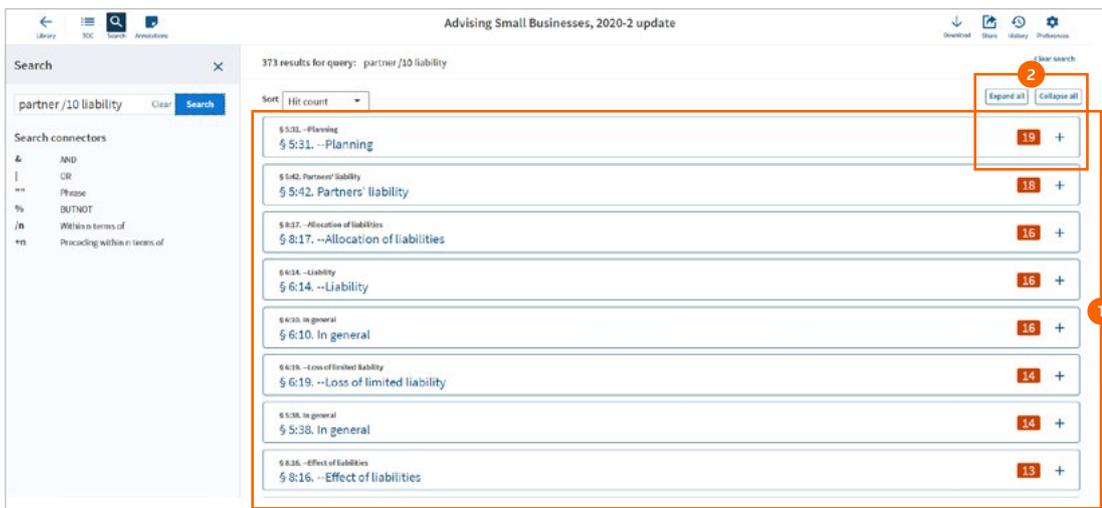
- Terms & connectors searching is supported
- Stemming is supported (e.g., 'search' will also return 'searching', 'searches', 'searched', etc.)
- Phrase searching is not supported (if you enter terms separated by spaces, spaces are treated as AND)
- Proximity searching (/n and +n) is not supported

Title navigation & search

Navigating search results

After running a title search, the search results appear in the right-hand pane in hit count order.

You can view a snippet either by selecting the '+' to the right of the hit count badge or select the 'Expand all' button at the top-right of the result list.



The screenshot shows a search interface for 'partner /10 liability' with 373 results. The results are sorted by hit count. The top results are:

- § 5:31. --Planning (19 hits)
- § 5:42. Partners' liability (18 hits)
- § 8:17. --Allocation of liabilities (16 hits)
- § 6:14. --Liability (16 hits)
- § 6:10. In general (16 hits)
- § 6:19. --Loss of limited liability (14 hits)
- § 5:38. In general (14 hits)
- § 8:16. --Effect of liabilities (13 hits)

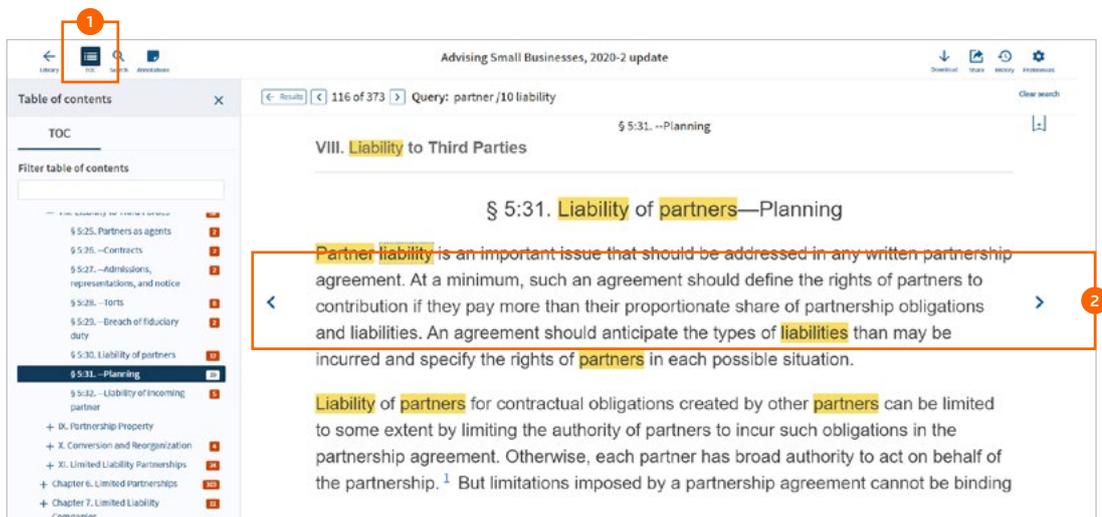
Annotations: 1 points to the search results list, and 2 points to the 'Expand all' and 'Collapse all' buttons.

1 Search results.

2 View by selecting '+' or 'Expand all'.

To begin reviewing the search results, select into the snippet text and use the '<' '>' arrows at the top of the document to navigate through the search terms.

Select the table of contents icon in the header to view search results within the table of contents panel.



The screenshot shows the 'Table of contents' panel on the left and the main document view on the right. The table of contents panel has a filter and a list of sections. The main document view shows the search results for 'partner /10 liability' within the document structure. The search results are:

- VIII. Liability to Third Parties
- § 5:31. Liability of partners—Planning

The snippet for § 5:31. Liability of partners—Planning is highlighted. The snippet text is: "Partner liability is an important issue that should be addressed in any written partnership agreement. At a minimum, such an agreement should define the rights of partners to contribution if they pay more than their proportionate share of partnership obligations and liabilities. An agreement should anticipate the types of liabilities than may be incurred and specify the rights of partners in each possible situation." The snippet is annotated with a red box and a '2' in a circle. The table of contents panel is annotated with a '1' in a circle.

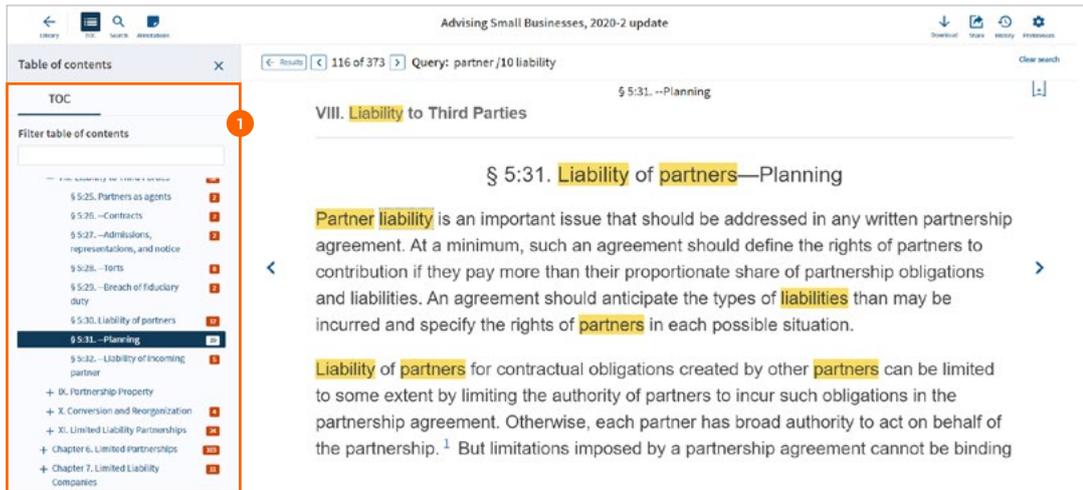
1 Table of contents icon (TOC).

2 '<' '>'.

Title navigation & search

Viewing in table of contents

Selecting the table of contents icon allows you to see the placement of your search results in the table of contents, allowing you to quickly identify relevant hits.



The screenshot displays a legal research interface titled "Advising Small Businesses, 2020-2 update". The search query is "partner /10 liability", resulting in 116 of 373 items. The interface shows a table of contents (TOC) on the left and the full text of the search results on the right. The TOC is highlighted with a red box and a red circle with the number 1. The search results on the right show the following text:

VIII. **Liability to Third Parties**

§ 5:31. **Liability of partners—Planning**

Partner liability is an important issue that should be addressed in any written partnership agreement. At a minimum, such an agreement should define the rights of partners to contribution if they pay more than their proportionate share of partnership obligations and liabilities. An agreement should anticipate the types of **liabilities** than may be incurred and specify the rights of **partners** in each possible situation.

Liability of partners for contractual obligations created by other **partners** can be limited to some extent by limiting the authority of partners to incur such obligations in the partnership agreement. Otherwise, each partner has broad authority to act on behalf of the partnership.¹ But limitations imposed by a partnership agreement cannot be binding

1 Viewing the TOC.

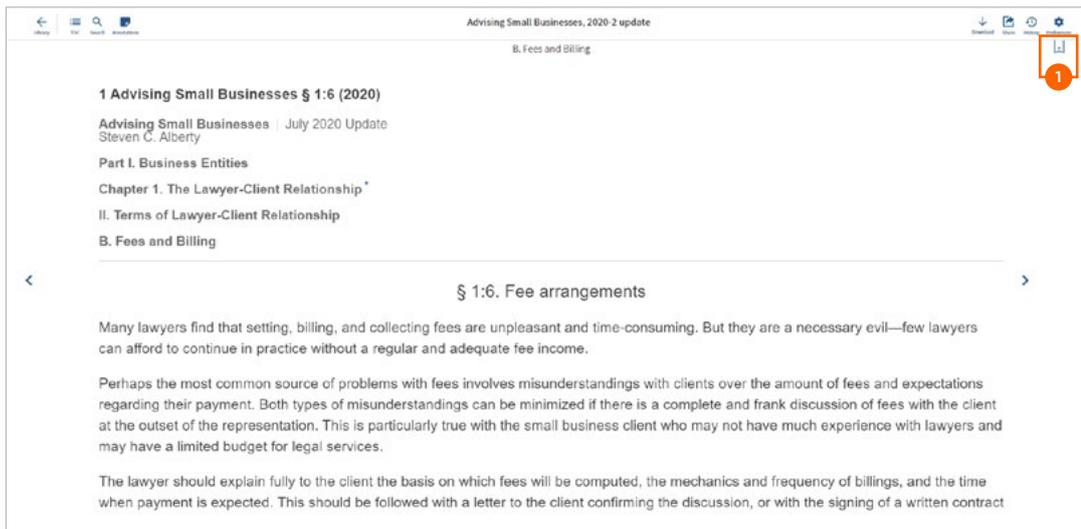
Annotations (Bookmarks, Highlights, Notes, Import)

Bookmarks

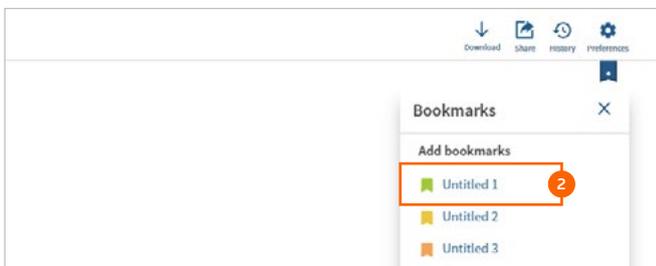
To add a bookmark, select the icon in the upper right corner and select the desired colour.

To delete the bookmark, select the overflow menu to the right of the label.

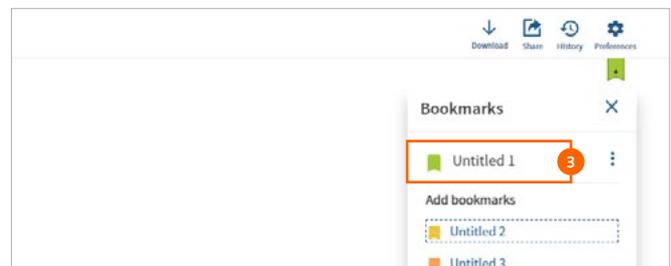
Select the 'x' in the upper right corner to close the pop-up window.



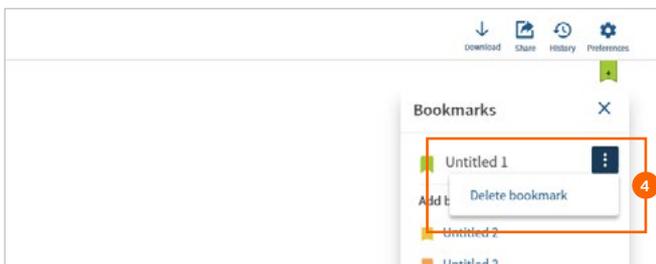
1 Bookmark icon.



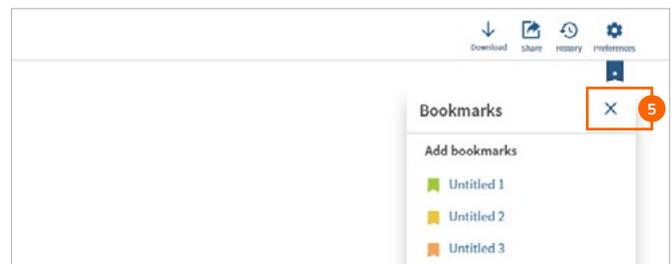
2 Choose a colour from the list.



3 Colour selected.



4 Select the overflow menu to delete the bookmark.

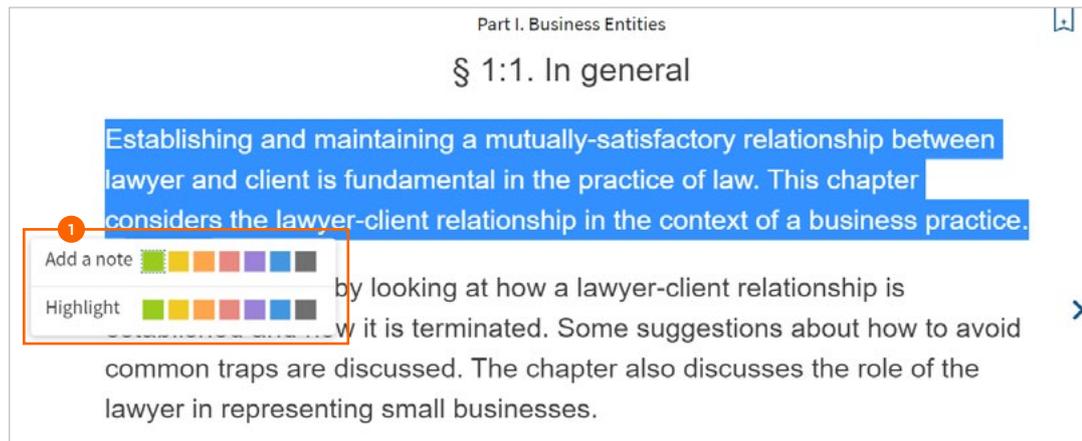


5 Select the 'x' to close the pop-up window.

Annotations (Bookmarks, Highlights, Notes, Import)

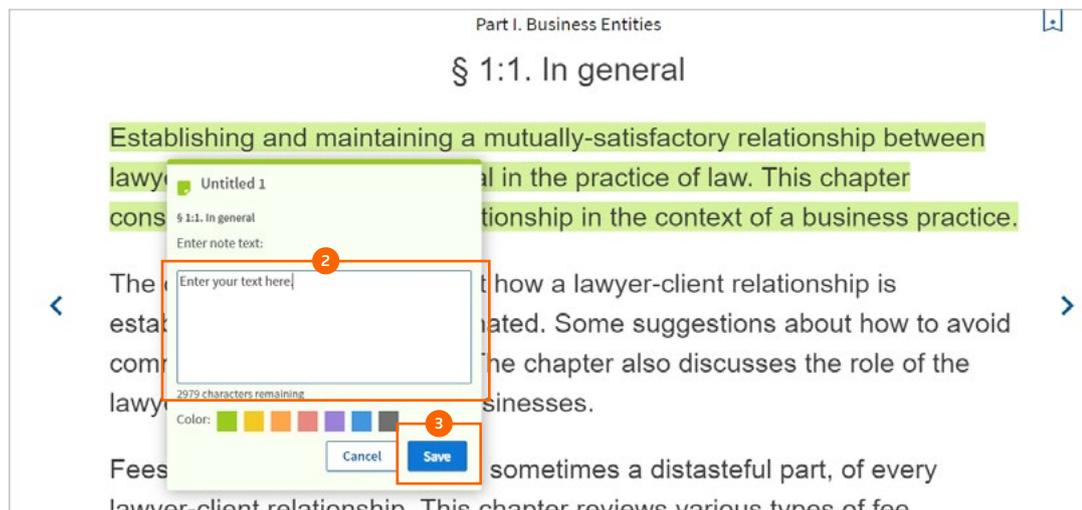
Notes & highlights

After selecting text, a pop-up window appears. Select the desired colour to the right of 'Add a note' to highlight the text.



1 Add a colour.

After selecting text, a pop-up window appears in which you can enter text and select 'Save'. A note icon will appear in the margin.



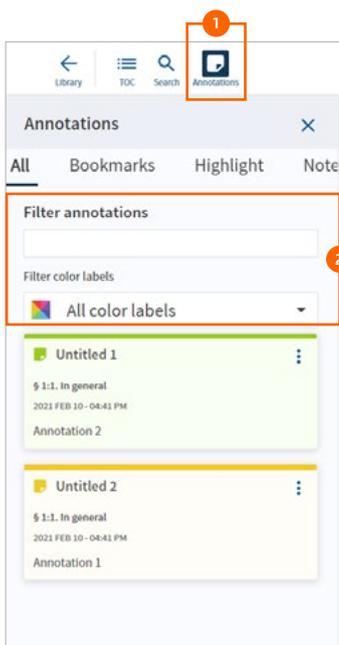
2 Enter text here.

3 Select 'Save'.

Annotations (Bookmarks, Highlights, Notes, Import)

Viewing annotations

Selecting on the note icon in the title header bar will open the annotation panel. From here, you can filter annotations by type or label colour.



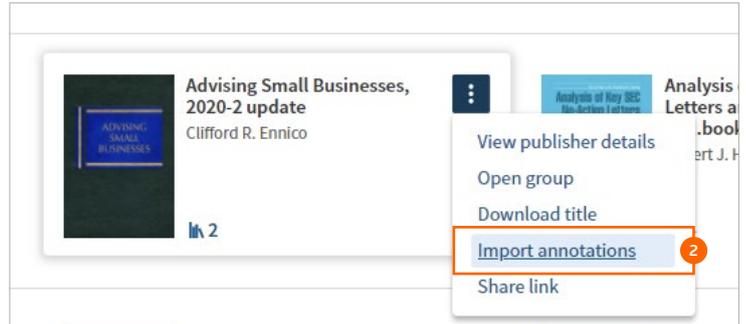
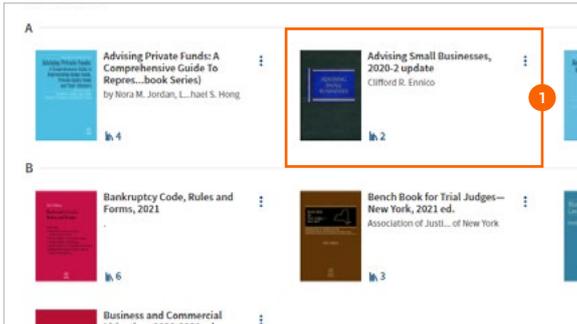
1 'Annotation' icon.

2 'Filter annotations'.

Annotations (Bookmarks, Highlights, Notes, Import)

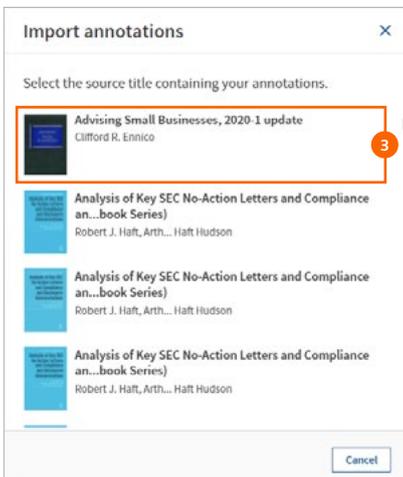
Import annotations

To import your bookmarks, notes, and highlights from one edition to the next, choose 'Import annotations' from the title card overflow menu.

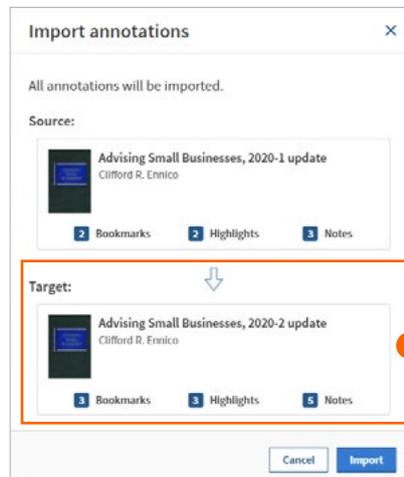


1 Select the source title from the list of titles by selecting the title in the list.

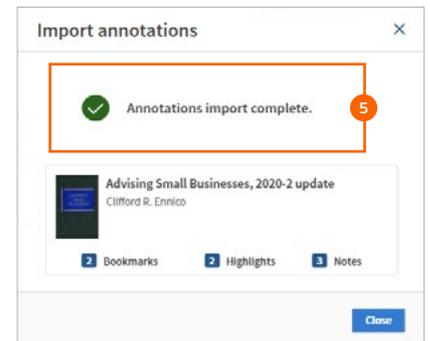
2 Select on the overflow menu, and select 'Import annotations'.



3 Select target title.



4 A summary of source and target annotations is provided.



5 Select 'Import' you will receive a confirmation message upon completion.

