



IntelliConnect[®]

Quick Reference Guide



The tax and accounting research trusted by Canada's top accounting firms – now faster and more connected than ever.



Faster answers
Better results

Home Screen Overview

View and browse through your entire subscription.

Save important documents for later use by you or your colleagues.

Select your search scope — all content, within results, selected content, selected documents or within document.

Type your search terms.

Keep important documents for easy printing and saving.

View all the Practice Tools & Smart Charts to which you have access.

Get the latest tax news emailed directly to you.

Jump to a specific document using a citation.

Up-to-date highlights of the most important tax issues, including tips and tricks for users and essential notifications.

Exclusive articles and analysis on the most important issues and changes in the Canadian tax and regulatory environment.

The screenshot shows the IntelliConnect interface with a search bar at the top containing 'all content'. Below the search bar is a navigation menu with 'Home', 'Browse', 'Research Folders', 'Go To', and 'News Tracker'. The 'Browse' section is expanded, showing 'My Favorites' and 'All Content (Practice Areas)'. The main content area features 'IntelliConnect News' with articles like 'Classification of the Canadian TFSA for US tax purposes' and 'Recent Income Tax Draft Proposals'. To the right, there's a 'IntelliConnect Training Videos' section with a list of videos and a 'Give us your feedback' box.

Searching your entire subscription

- Make sure to select **all content** in the search *Search Options* box.
- Type your search terms (e.g., **home office deduction**) in the search box.
- Click **Go**.

Searching using a citation

- Type the entire citation format or number (e.g., **ITA 248[1]**).
- Click **Go**.

Searching selected content

If you want to search specific areas of content, such as a publication:

- Click **Browse** in the Quick Bar.
- Locate the publication, or other area you want to search.
- Click in the checkboxes next to the area you want to search. The search scope will be automatically changed to selected content.
- Type your terms in the search box and click **Go**.

Narrowing your results using Filters

You can narrow your results by using **Filters**. Filters break down the search results returned into specific categories.

- *Document Type*, such as Commentary and Analysis, Legislation, Government and Provincial Tax
- *Library*, such as Federal Tax, Income Tax, GST and Provincial Tax
- *Jurisdiction*, such as Federal, Provincial and International
- *Language*
- *Tools* (Smart Charts)

Searching within the selected scope

By default, your searches will include all of the content in your subscription. To change your search scope, click the down arrow in the search box, and choose one of the following:

- **all content** — searches all of the content in your subscription
- **within results** — searches the results from the active search tab only
- **selected content** — searches the items you have selected within Browse only
- **selected documents** — searches the content of the documents you selected only
- **within document** — searches the term(s) within the selected document only

Viewing search results and documents

View your search results and documents using the convenient **split screen view** of IntelliConnect: the Search Results pane on the top and the Preview pane on the bottom.

- After doing a search, click a document in the Search Results pane.
- The Preview pane opens at the bottom of the screen.
- Quickly scan through your results list by clicking different search hits and you'll see the corresponding document in the Preview pane.
- Make notes and annotations and save them to documents.

Search Screen Overview

Define the search scope.

Keep important documents for easy printing and saving.

Show the top three most relevant documents by document type.

Close all tabs at once.

Maintain up to 8 search tabs.

Display your document in full screen mode.

Use the filters to narrow your results to specific areas of interest. You can apply multiple filters at one time.

View the path to this document.

Close your document.

Go to the next or previous document on the results lists.

Go to the next or previous documents in the publication.

Display your document in a new window.

Using notes and highlights

You can add notes and highlights to documents you select and view from a document list. To add notes to a document:

- Select some text within an IntelliConnect document.
- Select **Add Note** or a highlight colour from the pop-up menu.

Browsing through the contents of your subscription

- To browse your content, click the **Home** tab or the **Browse** button on the Quick Bar.
- In the Browse tree on the left, click through items until you find a document of interest.
- Click a document to view it on the right.

Keeping records of your research

- **Printing and Saving** — You can print and save documents and lists as text documents or as PDFs. These options are available at the top of lists and documents.
- **Email** — You can email multiple documents from IntelliConnect. This option is available at the top of documents.
- **History** — Always available at the top of the screen: a list and return to recent documents you viewed or searches you conducted.
- **Document Tray** — A place where you can temporarily set aside documents for later use.
- **Research Folders** — Save documents to folders for later use.
- **Share Research Folders** — Share research folders with other users. You designate which folders to share and with whom, giving them the ability to just read documents or read and save documents to the shared folder.

Tracking news

Set News Tracker searches so you can follow topics of interest in the news.

- Click News Tracker on the Quick Bar.
- To add a Tracker, click **Add/Modify Trackers**.
- To customize your Trackers, click the target icons next to the Tracker names and select additional options.

Using Boolean Connectors in your search

Here is a description of the Boolean connectors you can use in *IntelliConnect*. **Please note that there are some differences between *IntelliConnect* and *CCH Online*.**

TIP!

When you search using *IntelliConnect*, the plural version of a search expression is included in your search results. In other words, the results of a search for **contribution** will include **contributions**.

AND

Placing the word **and** between terms retrieves documents that contain both of the terms.

For example, if you type **court and appeals** as your search expression, your results will include documents that contain **court** and **appeals**.

Please note that the & symbol is not recognized in IntelliConnect.

OR

Placing the word **or** between terms retrieves documents that contain *either* or *both* of the terms. This is useful when entering synonyms.

For example, if you type **child or dependent** as your search expression, your results will include documents that contain **child** or **dependent** individual of each other. But your results will also include documents that contain both **child** and **dependent**.

NOT

Placing the word **not** between terms retrieves documents that contain the first term only if the second term does not appear. This connector is useful when your keyword often appears in a context that is irrelevant to your research.

For example, if you want to find documents concerning Columbia, the search expression **Columbia not British** excludes documents in which **Columbia** appears as a part of **British Columbia**.

Using wildcards in your search

IntelliConnect's Wildcard feature helps you perform a search on those occasions when you are not sure about the exact spelling of a keyword.

Wildcards allow you to retrieve various words by using the same root (or other common characters) without having to type each possibility as a separate keyword. You can use wildcards or other related universal characters to indicate the spot in your keyword where the system can substitute any character.

Asterisk Wildcard

You can use an asterisk (*) instead of a character in your search term to indicate that any number of characters can be substituted instead of the asterisk.

For example, if you type **depreciat*** as your search term, your results will include **depreciate**, **depreciating**, **depreciation**, etc.

Note: The bold text in the previous example shows the location where characters were substituted for the asterisk in the search term.

Question Mark Wildcard

You can use a question mark (?) instead of a character in your search term to indicate that any character can appear in that specific position in the search term.

For example, if you type **advis?r** as your search term, your results will include **advisor** and **adviser**.

If you include two or more question marks together in your search term, the system makes substitutions based on the number of question marks you included consecutively in your search term.

For example, if you type **??clude** as your search term, your results will include **exclude**, **include**, and **occlude** but not **preclude** (because **preclude** would have required your search term to be **???clude**).

Note: The bold text in the previous examples shows the location where characters were substituted for the question mark(s) in the search terms.

Using an exact phrase in your search

You can use *IntelliConnect* to search for an exact phrase. When you search for an exact phrase, you are searching for all the search terms in the phrase in the exact order in which they appear.

To search using an exact phrase, simply type the search expression between quotation marks.

For example, if you want to search for **limited liability corporations**, but only want to retrieve results in which the terms appear as an exact phrase, type "**limited liability corporations**" (including the quotation marks) into the appropriate field and click **Go**.

Your search results will only include documents that contain the exact phrase - **limited liability corporations** - as typed between the quotation marks.

In other words, your search results will include documents that contain **limited liability corporations** as an exact phrase but will not include results where the terms are separated by other words (i.e. **corporations** with **limited liability**).

TIP!

If you type a search expression that includes a wildcard character between quotation marks (in an attempt to search for an exact phrase using a wildcard), the wildcard character will be considered as a space or blank character and will not be recognized by *IntelliConnect*.

For example, including the asterisk wildcard character (*) in the phrase "**nonpublic utilit***" causes *IntelliConnect* to return no results (even though a search for **nonpublic utilit*** returns results - as does a search for "**nonpublic utility**").

For best results, do not include quotations in a search using wildcard characters.

Using Proximity Connectors in your search

The proximity connectors that you can use while searching in *IntelliConnect* are **W/n**, **F/n**, **P/n**, **W/sen**, and **W/par**. These connectors indicate the relationship that two or more terms in the search expression must have in a document in order for the document to be included in your search results. To use proximity connectors, simply type your search expression using a proximity connector between the terms of your search expression.

List of proximity connectors that can be used in IntelliConnect:

Symbol	Operator Description	Example	Finds documents with
W/n	Within the specified number of words (where <i>n</i> equals the number of words)	Canada w/25 corporation	The words Canada and corporation only when they appear within 25 words of each other
F/n	The first term follows the second term by no more than a specified number of words (where <i>n</i> equals the number of words)	credit f/2 foreign	Both the words credit and foreign in which the word credit follows the word foreign by no more than two words
P/n	The first term precedes the second term by no more than a specified number of words (where <i>n</i> equals the number of words)	foreign p/2 credit	Both the words credit and foreign in which the word foreign precedes the word credit by no more than two words
W/sen	Contains the first term within 20 words of the second term	office w/sen expenses	The word office located within 20 words of expenses.
W/par	Contains the first term within 80 words of the second term	office w/par expenses	The word office is within 80 words of expenses .

Notes:

The value of *n* cannot exceed 127 words.

You can combine any Boolean connectors between two terms with any proximity connector. For example, you could search for **home AND office w/sen expenses** or **office OR deduction w/sen expenses**. You can also use a specific group of words as search expression. For example, you could modify the above example to search for **"home office" w/sen expenses**.

TIP!

When you combine the use of Boolean connectors and proximity connectors, you must not use brackets. Instead, use quotation marks or yet, do two separate searches.

Using the IntelliConnect Search Plug-In

The *IntelliConnect Search Plug-In* is the most recent addition to the *IntelliConnect* platform. This tool provides new functionalities to your preferred Web browser, allowing you to automatically target the content of your Wolters Kluwer Canada subscriptions when you do a search in Google[®], and display the result directly on the results page of this search engine.

This tool allows you to save time and money by using both public and professional information sources at the same time.

Click this link to install the *IntelliConnect Search Plug-In* on your computer and start using it:
<http://static.intelliconnect.ca/site/icsearch>



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