

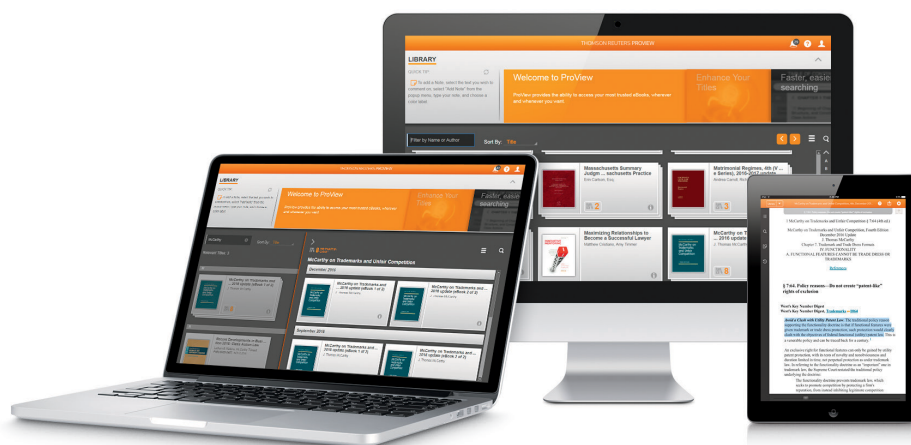


# PROVIEW PRACTICE SERIES GLOBAL USER GUIDE

Thomson Reuters ProView® is the premier eBook experience for professionals worldwide. ProView has an expanding list of titles across 17 countries, currently supports seven languages, and can be accessed on multiple devices. It gives you access to your eBook library wherever you need it: at your home, in your office, with your clients, or on the go. This ProView Practice Series User Guide tells you how to use ProView's features and capabilities to maximize your use of authoritative digital titles from Thomson Reuters and other professional content.

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# GETTING STARTED



## SELECT YOUR PREFERRED ACCESS

You may access ProView at [proview.thomsonreuters.com](http://proview.thomsonreuters.com) on your browser, or by downloading the ProView app on your PC, Mac®, Android™, or iPad® devices.

## USE MULTIPLE DEVICES

You may authorize up to four devices to use for your individual ProView account. Once you have reached your limit, you may de-authorize a device and add a new device to your authorized list.

ProView allows for two concurrent browser sessions to meet user's workflow needs. Additional concurrent ProView sessions will result in an error message and will not allow you to proceed until the additional concurrent session has expired.

## LOG IN WITH ONEPASS

To begin using ProView, log in with your OnePass **username** and **password**.

**OnePass Sign In** [Use Checkout Code](#)

**Username**  
  
[Forgot Username?](#)

**Password**  
  
[Forgot Password?](#)

☐ Save my Username  
☐ Save my Username and Password

**Sign In**

[Create a new OnePass profile](#)  
[Update an existing OnePass profile](#)

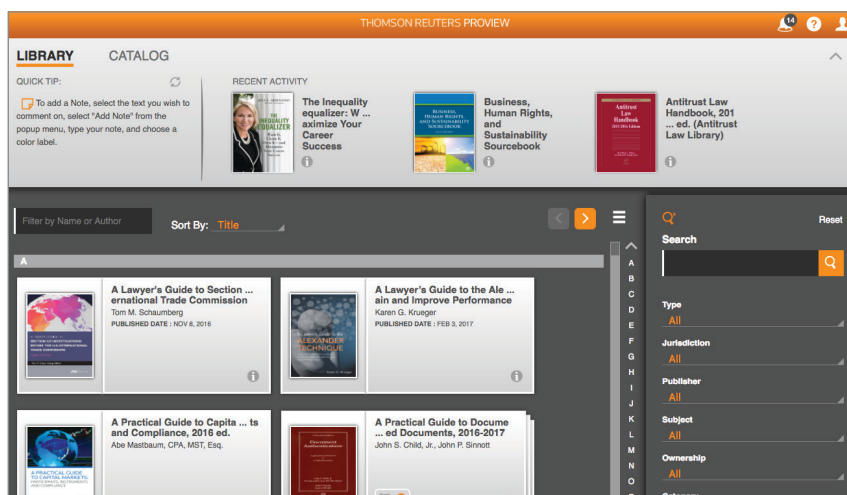
# GETTING STARTED *continued*

## LIBRARY MAIN PAGE

You'll find everything you need to know about your eBook collection and your account at the library level.

## RECENTLY READ TITLES

Titles you have recently read are shown in the bar at the top of your library so you can return to them quickly. Using the arrow, collapse or expand this bar at any time.



## NOTIFICATIONS, HELP, AND ACCOUNT

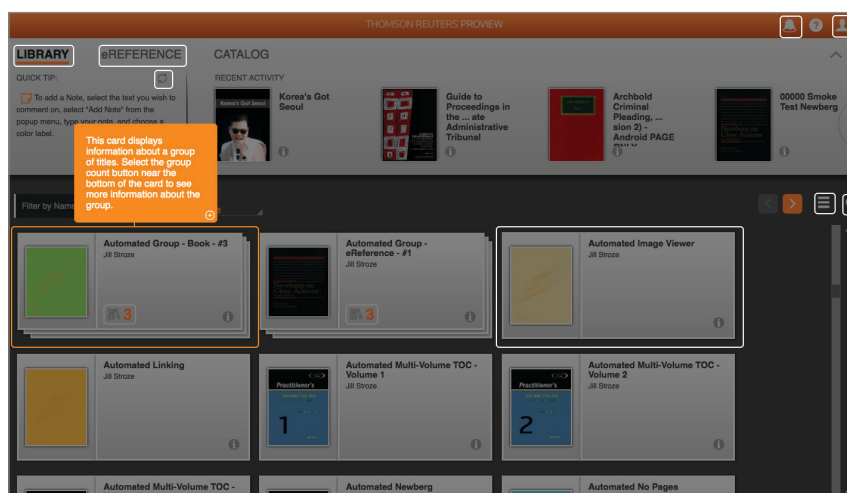
In the upper-right corner of your library there are three icons.



**Notifications** – Alerts you each time a title is updated in your library or a new title is added to your library



**Account** – Select languages, access our contact information and privacy policy, refresh your library, or sign out of ProView



**Help** – Lets you select any area outlined in white to learn more about its functionality



# GETTING STARTED *continued*

## YOUR PROVIEW TITLES



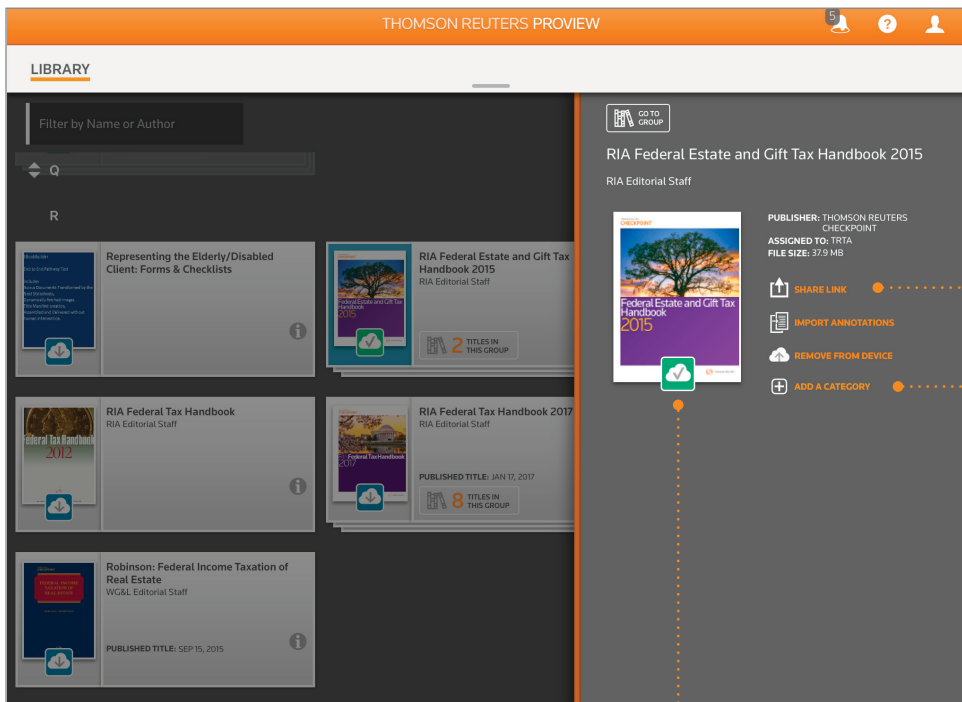
To learn more about a title, select the title's **information icon**. A details panel will appear that shows you publishing and author information.



### DOWNLOAD A TITLE

If you're using the desktop or tablet applications, you must download a title in order to open it. Download a title by selecting its cover, either on the detail panel or the main library.

ProView in a browser offers immediate navigation into a title without downloading it.



SHARE LINK



IMPORT ANNOTATIONS



REMOVE FROM DEVICE



ADD A CATEGORY

From this panel, you can:

**Share a link** – Create and share a link to the title

**Add a category** – Add categories to your titles so you can easily sort the library by your own terms



### OPENING A TITLE

Once you have downloaded a title, open it by selecting the cover, either on the detail panel or the main library.

# BASIC SEARCH AND NAVIGATION

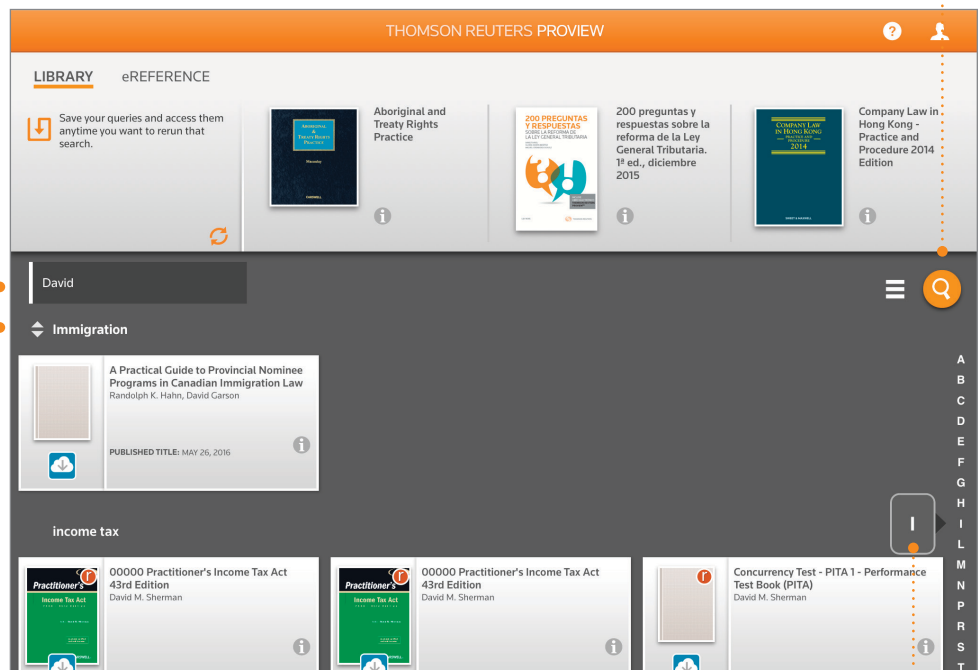
Use ProView's search and filter tools to find and navigate titles in the library.



Select the orange **search icon** to access the *Search and Filter* panel.

Select the **Title/Author filter** to quickly locate a digital title by entering the title or author's name.

Select the **sort menu** to change the order by which titles are listed in your Library view. Choose from options such as alphabetical title name, jurisdiction, and subject.

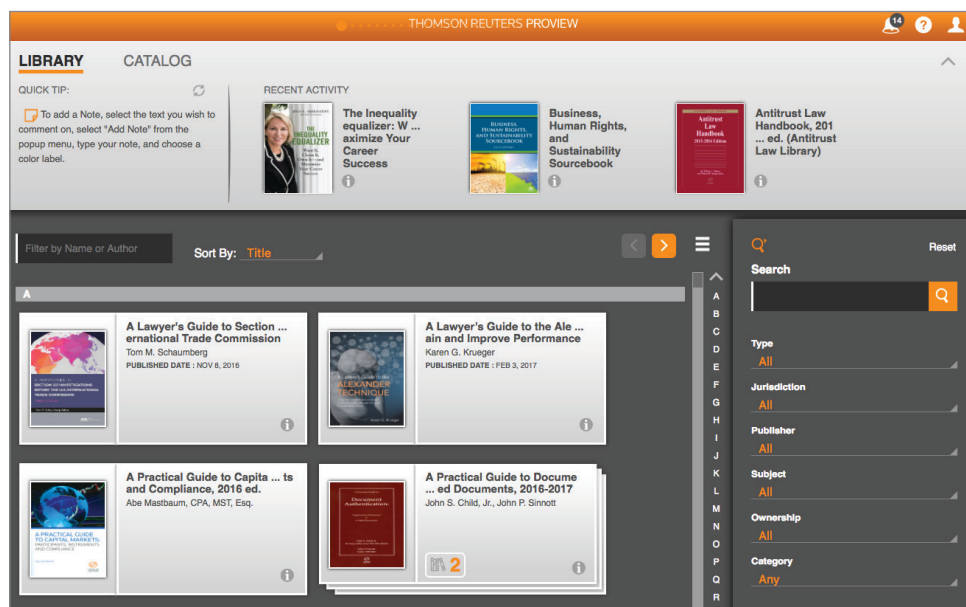


Use the **alphabetical index** on the right to quickly jump to different sections of your list of titles.

# BASIC SEARCH AND NAVIGATION *continued*

## SEARCH AND FILTER PANEL

This panel contains the Content Search field and a variety of filter options, such as Subject, Jurisdiction, and Category. Filters can be used in combination with one another to narrow down your list of title choices.



Clear out searches and filters quickly by selecting the **Reset** link on the Search and Filter panel.

## CONTENT SEARCH

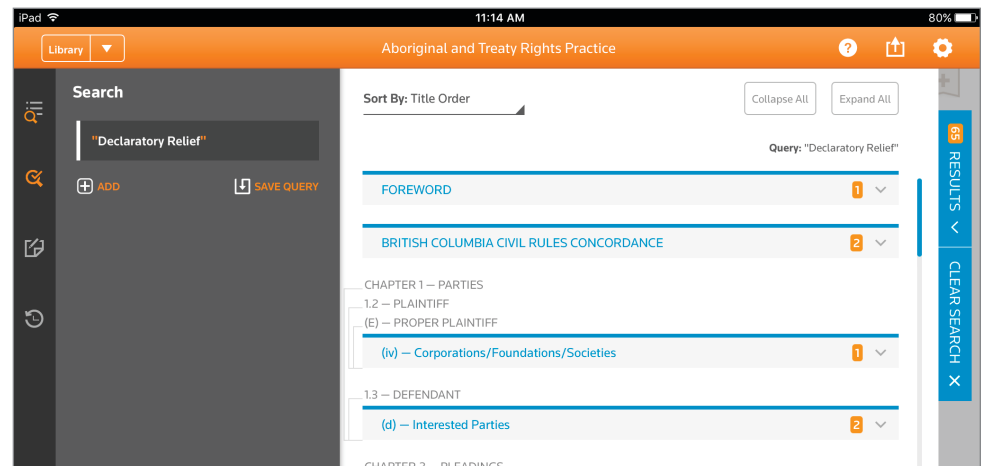
Search for a keyword or phrase across all of your titles at once. If you're using a mobile device, such as a tablet, you'll need to download the title to your device in order to search title content.

Titles matching your content search are listed in order of relevance. Select a title to open it and view the search within the context of the title itself.

# BASIC SEARCH AND NAVIGATION *continued*

## SEARCH IN THE TITLE

Your content search from the library is carried through to the title and brings you immediately to the list of search results. Explore the results to locate the content you need.




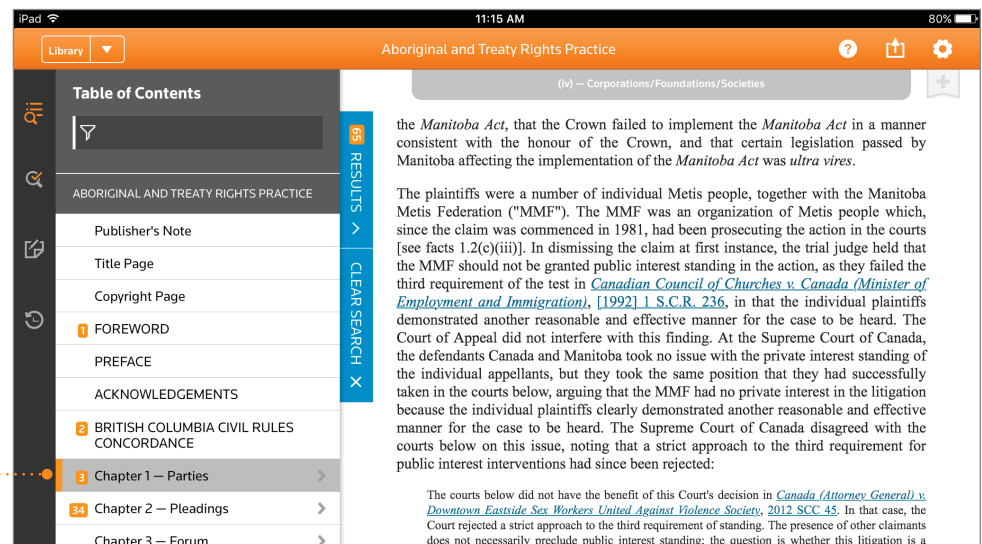
## TABLE OF CONTENTS

The table of contents panel shows the structure of the title for deeper navigation. If you have a content search running, you can see where the search hits are located in the title.

## FILTER THE TOC

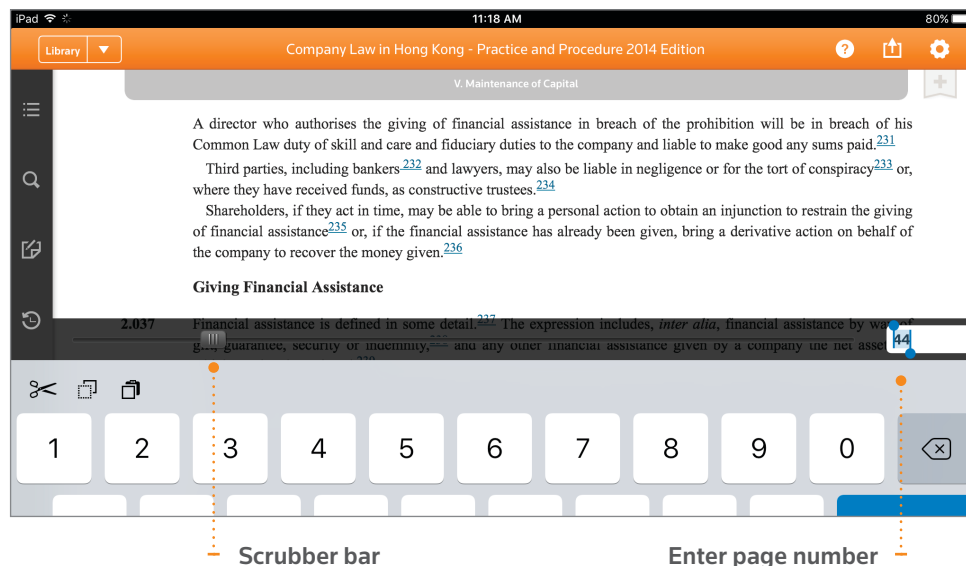
You can also filter the table of contents.

Matching table of contents terms will display as you type. Selecting a specific section will take you to that page. 



# BASIC SEARCH AND NAVIGATION *continued*

## SWIPING, SCRUBBING, PAGE NUMBERS



Navigate through a title by:

- Swiping from page to page
- Using the scrubber bar located at the bottom of the screen
- Entering a specific page number

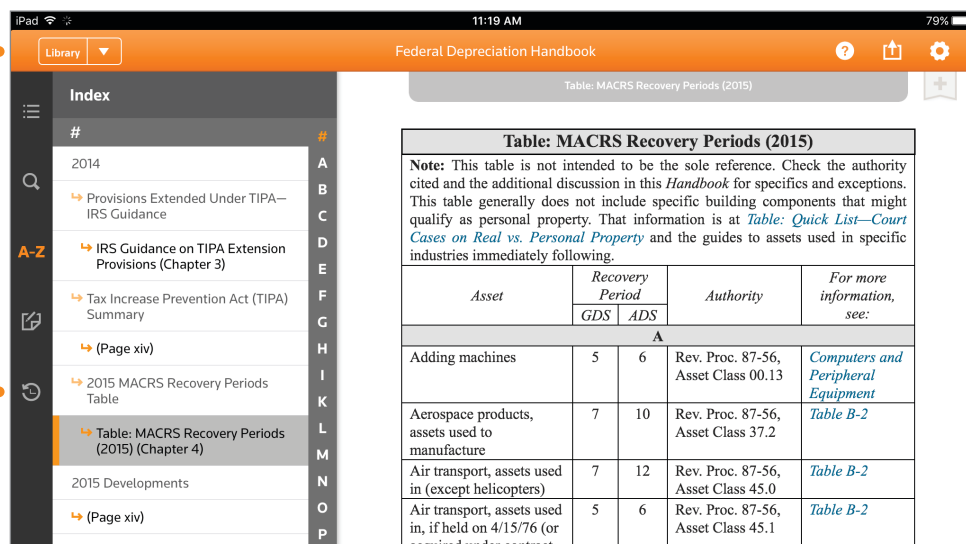


## LEAVING THE TITLE

Jump to a different title by opening the **Recently Read** panel or navigate back to your ProView Library.

## ADDITIONAL TOOLS

ProView eBooks have additional tools to aid navigation, such as your **navigation history** and, in some titles, an **A to Z index**.



A to Z index



# ADVANCED SEARCH AND NAVIGATION

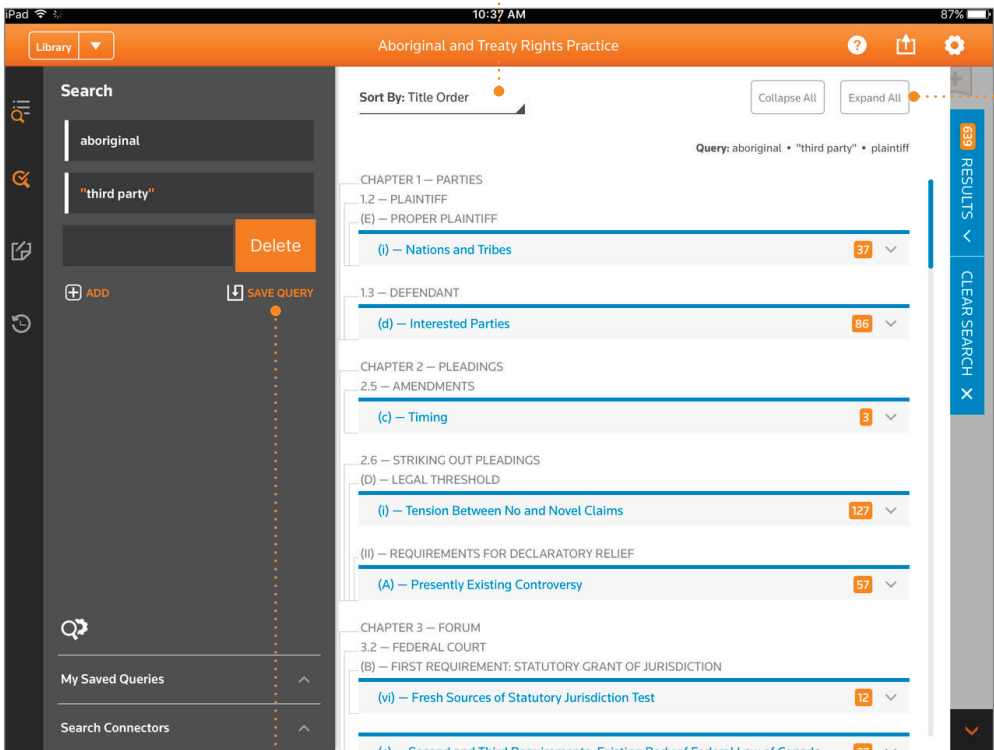
## SEARCH RESULTS PANEL

You can expand and collapse the search results panel to switch views between the title's content and the search results. If you have titles that support thesaurus terms, matching suggestions will display as you type your query.

## MODIFYING SEARCH

ProView offers the ability to search by more than one term. Simply select **Add** to include another term or phrase to your existing search. ProView searches for your terms that appear within close proximity of one another.

Search results are listed in the order by which they appear in the title, but you can quickly re-sort the order by **Hit Count**.



Each block of results shows an aggregated hit count by title section. Expand an individual block by selecting the arrow next to the hit count, or select the **Expand All** button to see all the result blocks. This reveals the snippet of relevant text containing your search term. Select the snippet to collapse the search results panel and go to that page.

## SAVING SEARCHES

If you frequently run the same searches over and over, you may want to consider saving the query by selecting **Save Query** after you've run your query.

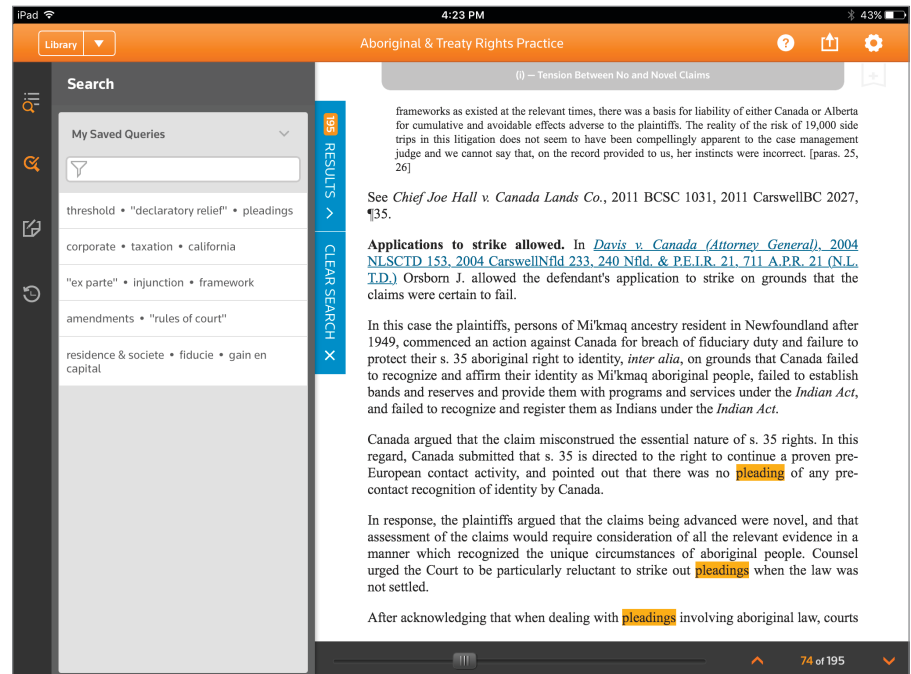
# ADVANCED SEARCH AND NAVIGATION *continued*

## SAVED QUERIES

To access your saved queries, select the **My Saved Queries** menu near the bottom of the Search panel.



Selecting a saved query from your list will run a search in the title you're currently viewing. Because you can create and run a query in any title, your results will vary.



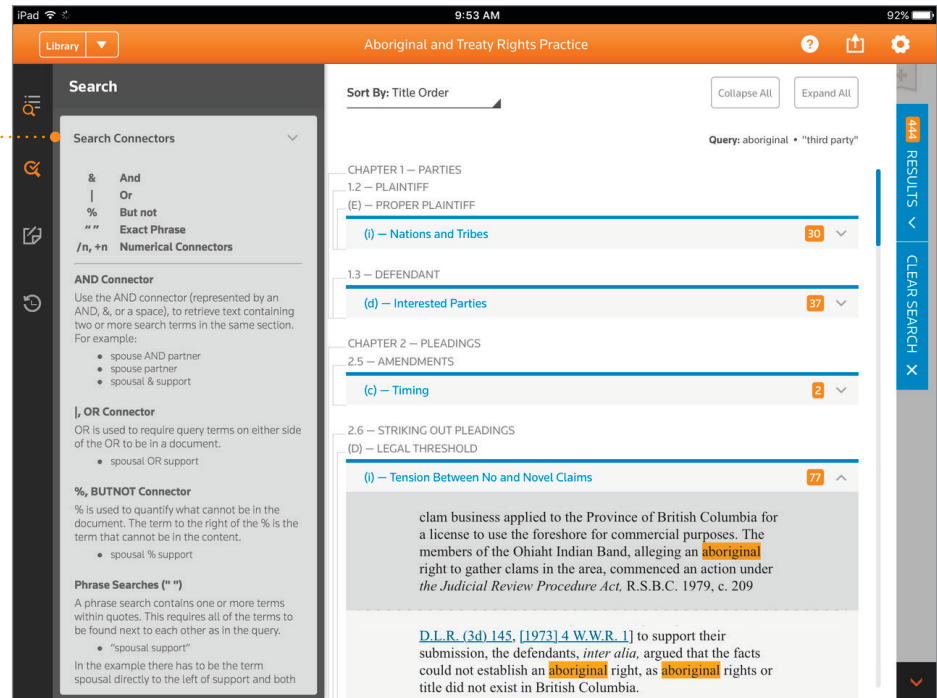
## NAVIGATING SEARCH RESULTS

In addition to navigating to relevant content from the search results panel, you can incrementally navigate through the search terms by selecting the hit count arrows located in the lower-right corner of ProView.

# ADVANCED SEARCH AND NAVIGATION *continued*

## SEARCH CONNECTORS

In addition to phrase searches, ProView supports queries that involve search connectors, such as AND, OR, BUT NOT, and numerical connectors. A quick tutorial is available within the Search panel.

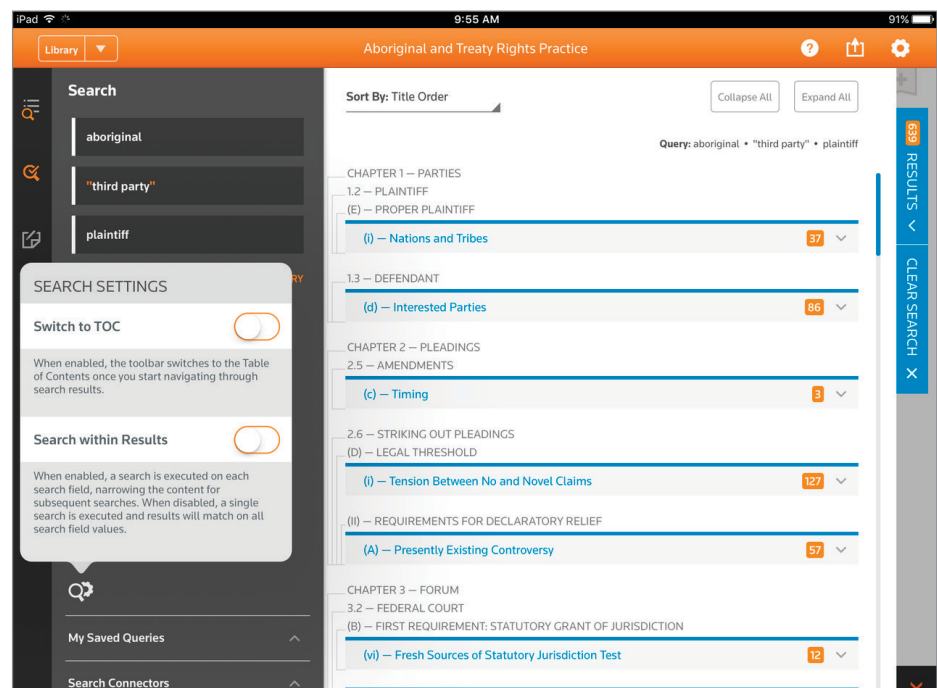


## SEARCH SETTINGS

ProView offers two settings that slightly modify your search experience:

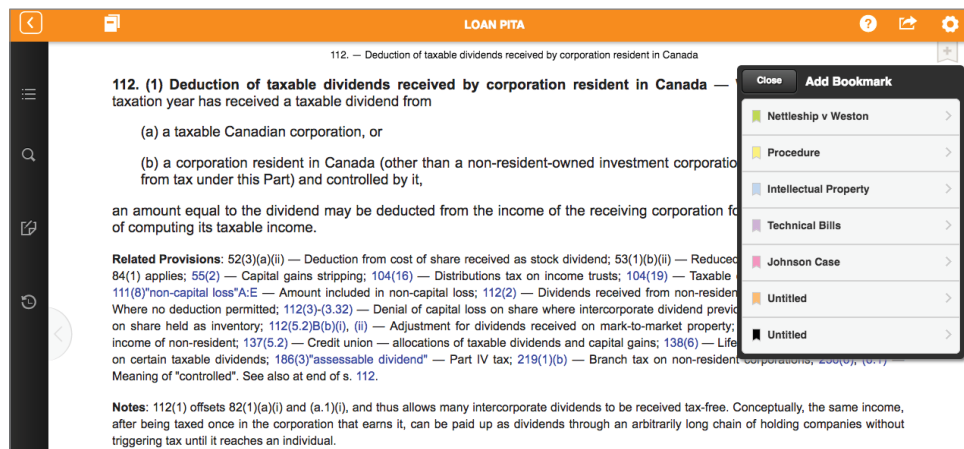
Turn on **Switch to TOC** if you'd like to view the table of contents panel while you navigate through the search results.

Turn on **Search within Results** to create a progressively narrower search on each search field you create. Only the last search term is highlighted.



# CREATING ANNOTATIONS

You can create three types of annotation to ProView titles – bookmarks, highlights, and notes.



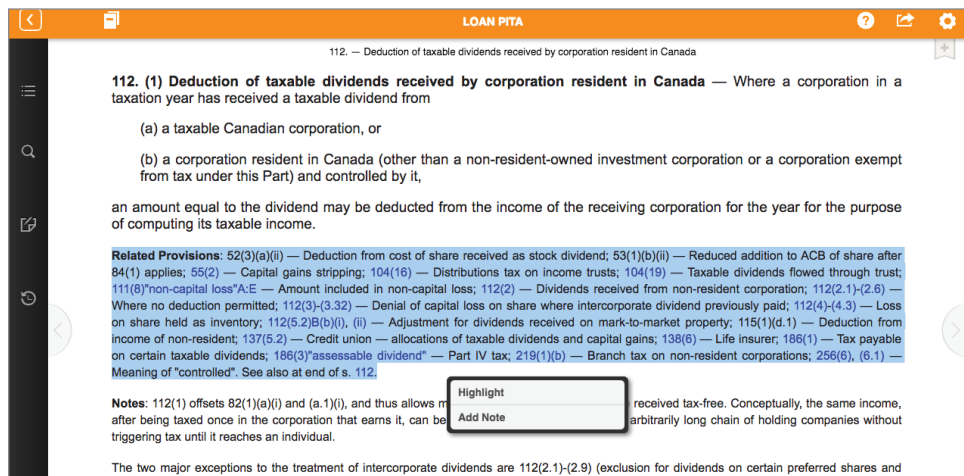
## CREATE A BOOKMARK

You can create bookmarks in your titles and then organize them using colors and labels. First, choose the **ribbon icon** in the upper-right corner.

Next, choose a color for the bookmark. Optionally, you can add a Description of the bookmark or you can modify the color label. Modifying the text of the color label will change that label for all annotations that use this color.

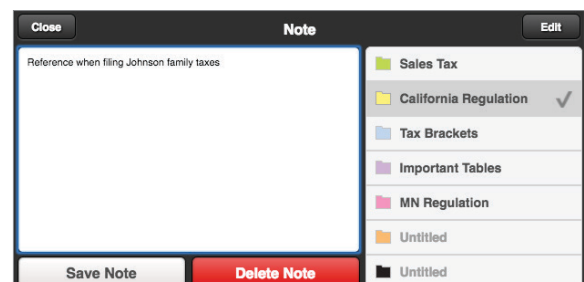
## HIGHLIGHT TEXT AND ADD NOTES

Creating a highlight or a note both begin by selecting text within the title. After you select the text, you'll see an action menu appear at the end of the selection with options to **Highlight** or **Add Note**.



When you select **Highlight**, you can choose a color label for the highlight. If you choose **Edit** and then select a color, you can modify the color label. Modifying the color label will change that label for all annotations that use this color.

When you choose **Add Note** from the action menu at the end of the selection, you'll see the Note dialog box. You can add your note text in the left side of the dialog box and choose a color for the note icon on the right side. Again, you can modify the color label by choosing **Edit** and then selecting a color. When you're done creating your note and choosing a color, you can **Save** the note or **Delete** it and start over.



# CREATING ANNOTATIONS *continued*

## ACCESSING YOUR ANNOTATIONS

You can see a list of all your annotations for a specific title in the Annotations panel. To open the panel, select the **annotations icon** on the left side of the title view.



The screenshot shows the '1040 Quickfinder Handbook 2016' interface. On the left, the 'Annotations' panel is open, displaying a list of annotations for the 'Savings Bonds Interest Exclusion' section. The panel includes tabs for 'All', 'Bookmarks', 'Highlights', and 'Notes'. Below these is a 'Filter Annotations' field. The list of annotations includes: '2-27 State Revenue' (2017-04-07 10:11 AM), '2-27 State Revenue' (2017-04-06 2:45 PM), 'Electing to Deduct Sales Tax' (2017-04-07 10:11 AM), 'Reference when filing Johnson family taxes' (2017-04-07 10:11 AM), and 'Reference when filing Johnson family taxes' (2017-04-06 2:45 PM). Each annotation has a small icon and a checkmark. At the bottom of the panel is a 'Show Displaced Annotations' button. The main content area on the right displays the 'SAVINGS BONDS INTEREST EXCLUSION' section, which includes a title bar, a subtitle 'Form 8815; See also IRC Sec. 135 and IRS Pub. 970', and a detailed explanation of the exclusion and its requirements. The requirements are listed in a bulleted format.

Within a title, all your bookmarks, highlights, and notes are listed. You can filter the annotations using the **Bookmarks, Highlights, Notes**, or **Color-Wheel** buttons at the top of the panel. You can also filter the list by typing a term you're looking for in the *Filter Annotations* field.

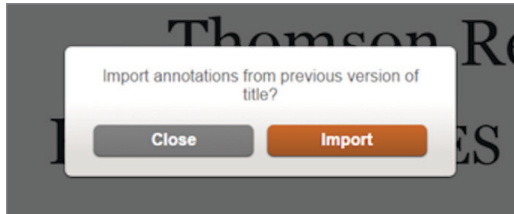
The individual annotations include an icon for each type of annotation, the highlighted text or page number for the bookmark, the time the annotation was created, and the name of the section where the annotation can be found.

Click on an individual annotation to navigate to the page where it is located.

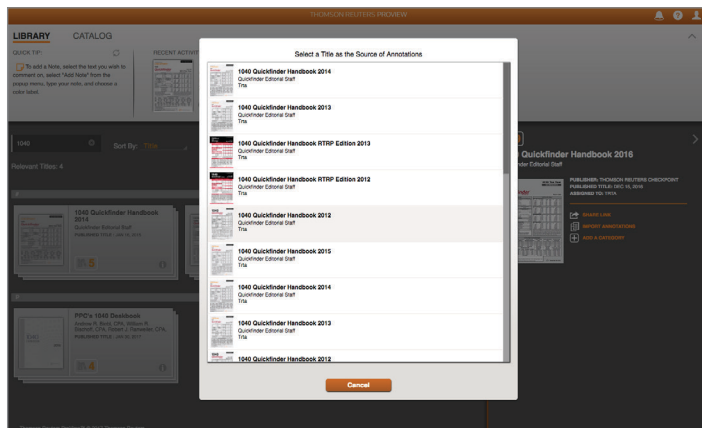
You can also delete a selected annotation.



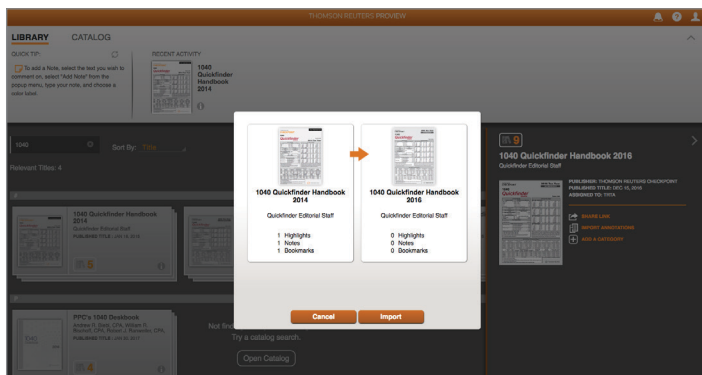
# IMPORTING ANNOTATIONS



ProView notifies you when an updated version of a title is in your library. When you open the new version, you may be asked whether you want to copy your bookmarks, notes, and highlights from your previous edition to the new one.



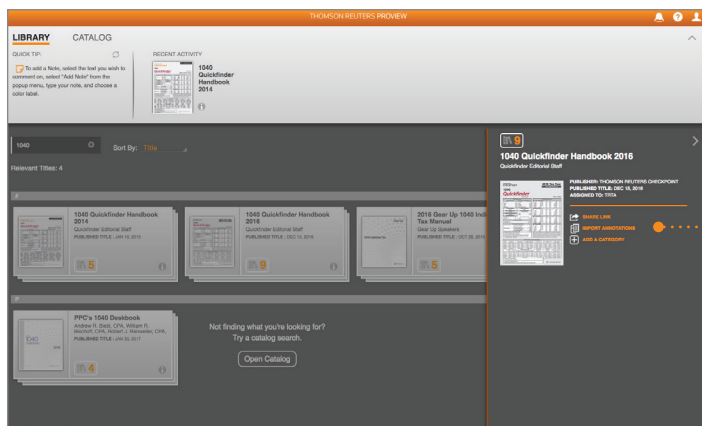
If you select **Import**, the next step is to choose the title you want to import annotations from – typically, an earlier version of the same title.



A dialog box will appear showing you how many annotations there are in the previous title on the left side and how many there are in the new title on the right.

Select **Import** in this box and the process of copying the annotations will begin. When the process is complete, you'll see the numbers of annotations that were copied to the new title on the right side and a message about the import process.

When you close the dialog box and open the new title, you'll see that it contains the annotations from the previous version.



You can also import annotations at any time by choosing **Import Annotations** on the title detail panel found in the *Library* view.

# IMPORTING ANNOTATIONS *continued*

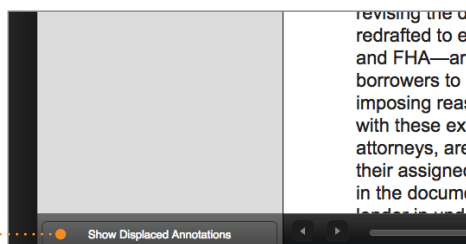
## DISPLACED BOOKMARKS, HIGHLIGHTS, AND NOTES

Once the annotation process is completed, you may see a message that some annotations were displaced during the import process. Annotations are displaced if the content of the title changed between versions.

You can view the displaced annotations by clicking

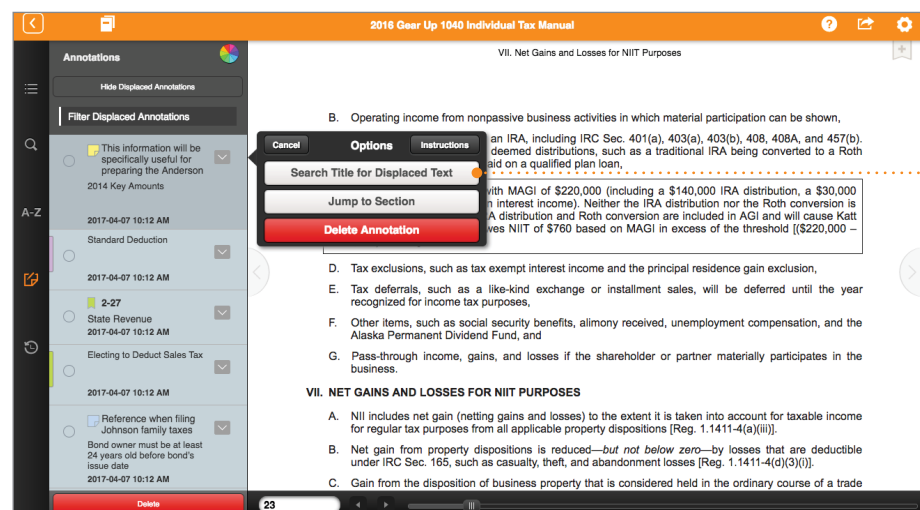
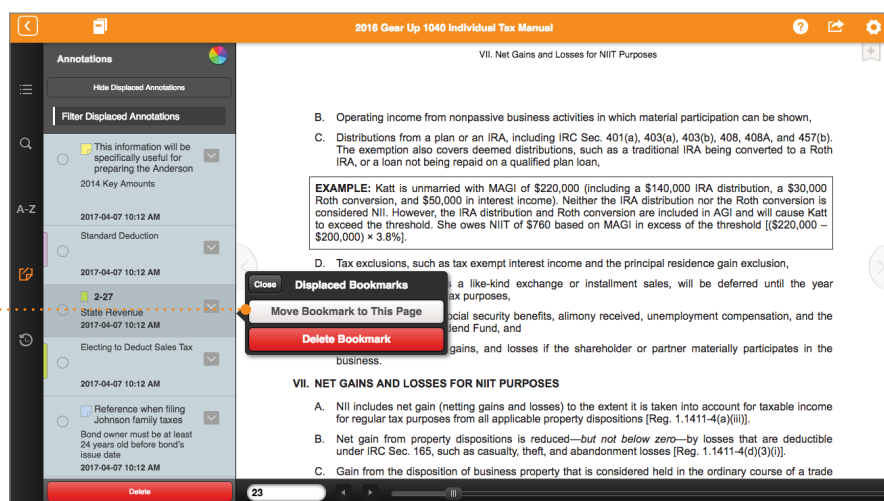
**Show Displaced Annotations** at the bottom

of the *Annotations* panel.



Displaced bookmarks can be replaced in the book by navigating to the page you want to bookmark, selecting the bookmark in the *Displaced Annotations* list, and then choosing **Move Bookmark to This Page**.

You can also delete the displaced bookmark.

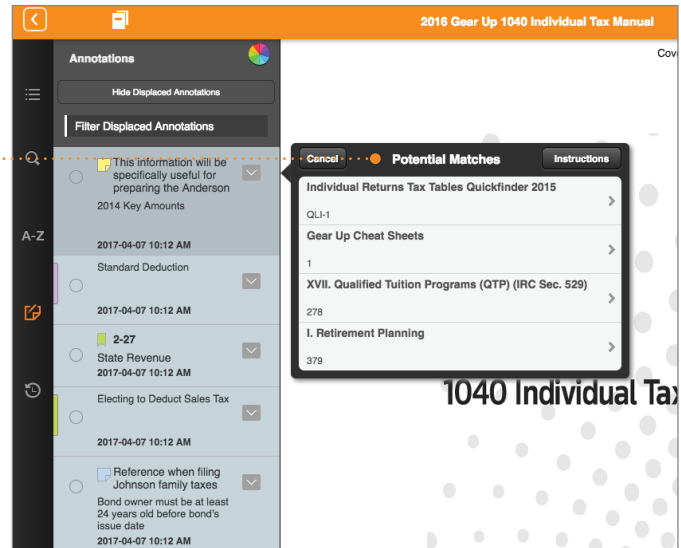
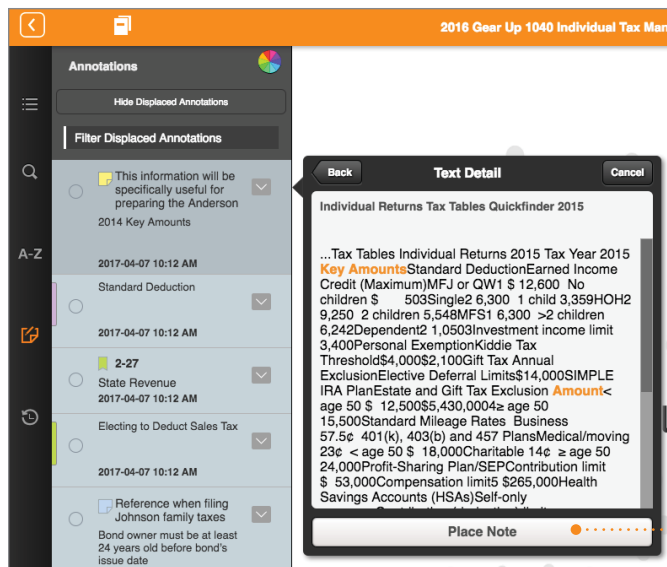


Displaced highlights and notes can be placed in the new title either by searching the text of the new version for possible placement locations or by placing the highlight or note at the beginning of a section.

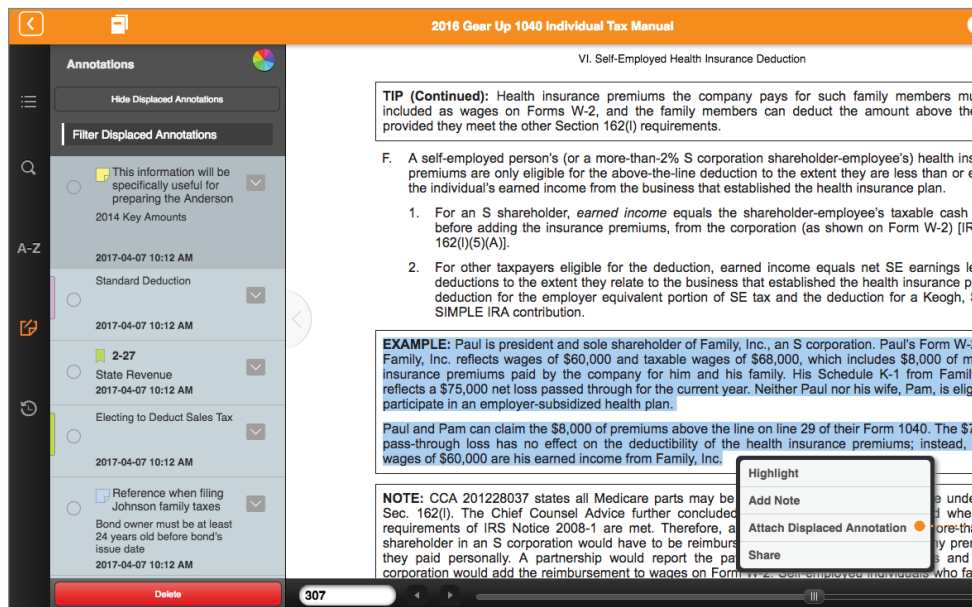
To use the search placement method, choose **Search Title for Displaced Text**.

# IMPORTING ANNOTATIONS *continued*

Choosing **Search Title for Displaced Text** will bring up a *Potential Matches* menu. Then choose the correct location from the list in the menu.



Place the annotation in the new location by choosing **Place Note**.

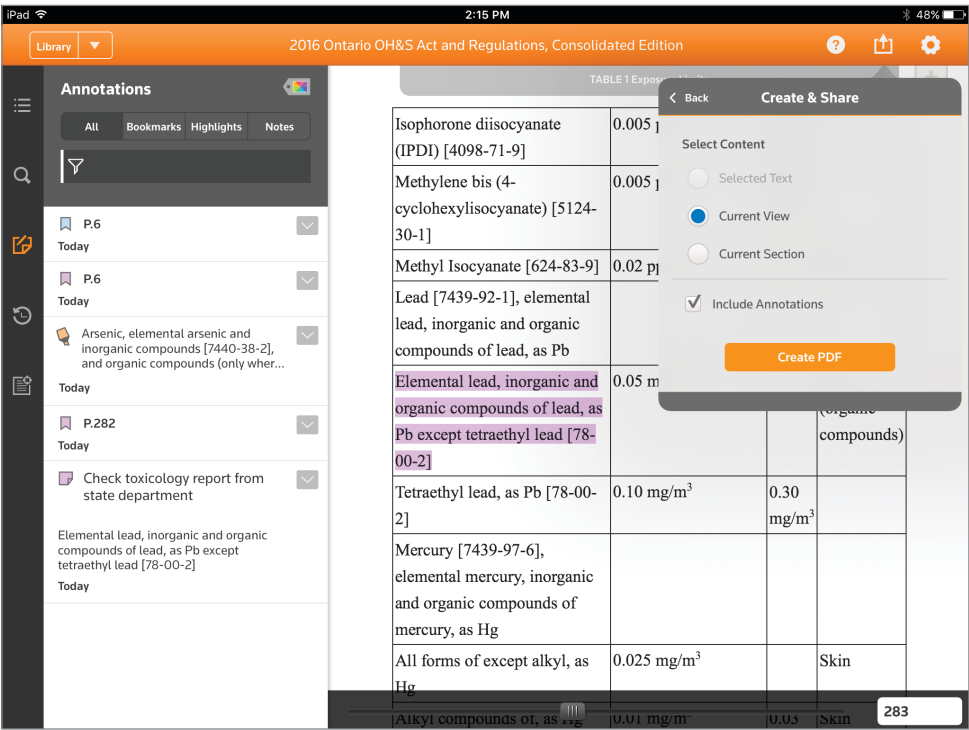


You can also jump to the beginning of the section where the annotation belongs, highlight some text, and choose **Attach Displaced Annotation** from the action menu.

These annotations could also be deleted.

# CREATE & SHARE

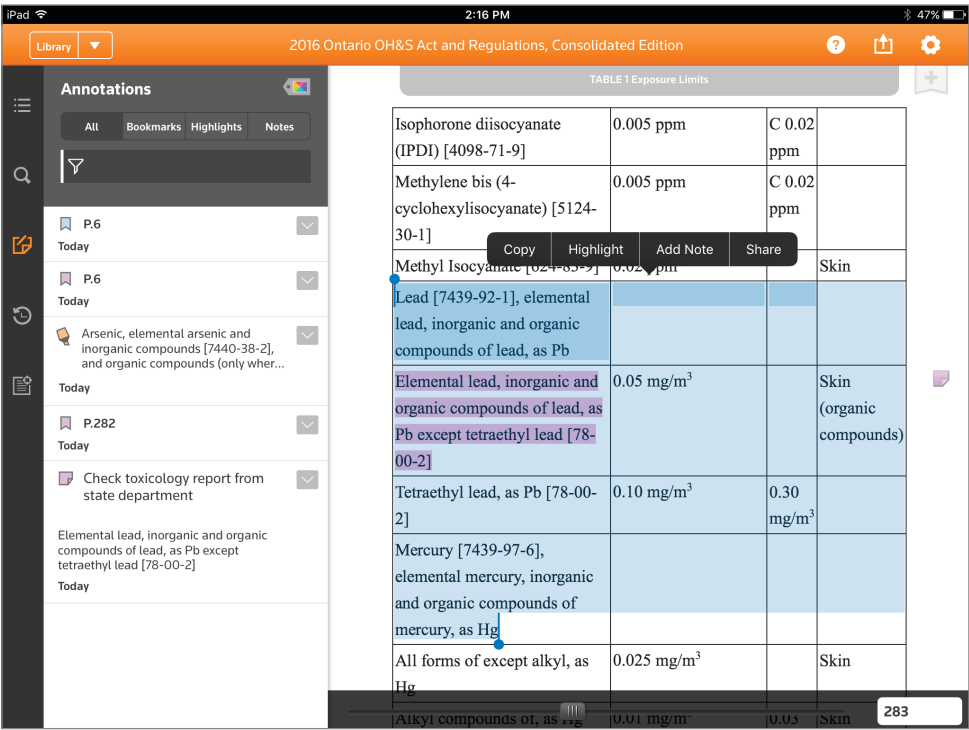
The Create & Share feature allows you to share excerpts or entire sections of text from any book in your library.



## CREATING A PDF OF CURRENT VIEWS OR SECTIONS

ProView makes it easy to create and share PDFs with clients and colleagues.

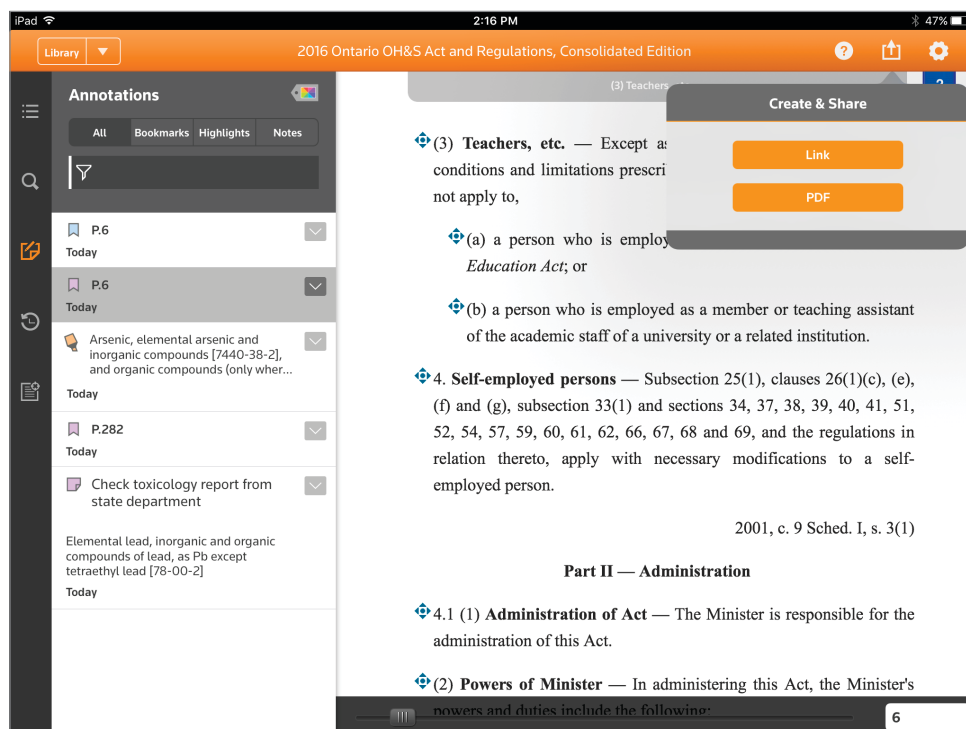
To generate PDFs from the text, select the **Create & Share** icon in the top right-hand corner. You will then have a choice of creating a PDF of your current view within the title or of the entire section. You also have the option of including your annotations. Select **Create PDF**.



An additional way to create and share a PDF is from the action menu that appears when you select text from within a title.

After highlighting text, select **Share**, then choose **Create PDF**.

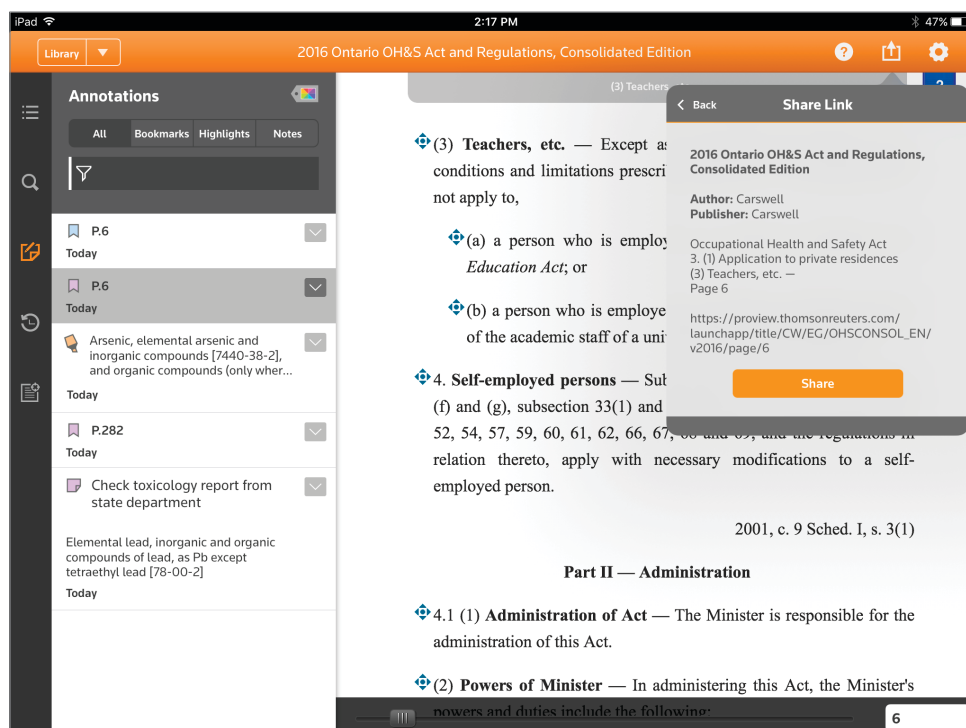
## CREATE & SHARE *continued*



### CREATING LINKS TO SECTIONS OF THE TEXT

ProView makes it easy to share links to specific locations within a title with coworkers and colleagues.

Select the **Create & Share** icon, then select **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 other applications on your device. The person who receives the link simply taps on it to launch ProView to open the title to the section.

Recipients of the link must be ProView users and have access to the same title.



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## ProView

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