# Contents

### Getting Started
- Welcome ................................................................................................................................. 1
- Logging into IntelliConnect® ..................................................................................................... 1
- The Search Bar .......................................................................................................................... 2
- The Quick Bar ............................................................................................................................ 3
- The Navigation Bar .................................................................................................................... 3

### Searching All of Your Subscription Content ........................................................................... 4

### Maintaining Multiple Search Tabs .......................................................................................... 5

### Using Filters to Narrow Your Search ....................................................................................... 5
- Changing Your Search Scope ....................................................................................................... 7
- Using Search Options .................................................................................................................. 8
- Viewing Search Results and Documents ....................................................................................... 9
- Viewing Documents Using the Split-Screen View ......................................................................... 10
- Locating Related Information ..................................................................................................... 11

### Browsing Your Product Content ............................................................................................... 12
- Searching from Browsed Content ............................................................................................... 12
- Viewing a Document List ............................................................................................................ 13
- Browsing Your Publication Titles (Titles A–Z) ........................................................................... 14
- Searching Your Publication Titles (Titles A–Z) ........................................................................... 15
- Searching by Citation ................................................................................................................ 16
- Tracking Cases and Rulings with the CCH Citator® ................................................................. 17

### Recordkeeping .......................................................................................................................... 18
- Printing Documents ................................................................................................................... 18
- Emailing Documents ................................................................................................................. 19
- Saving Documents ..................................................................................................................... 19
- Using the Document Tray .......................................................................................................... 20
- Saving Links to Documents and Other Content ........................................................................ 21
- Using Research Folders ............................................................................................................. 21
- Reviewing Your Research History .............................................................................................. 23
- Working with Favorites ............................................................................................................. 24

### Working with Tracker News ..................................................................................................... 25

### Practice Tools ........................................................................................................................... 28

### Preferences ............................................................................................................................... 30
- Setting Your Preferences ........................................................................................................... 30
- Practice Areas ........................................................................................................................... 31
- My Profile .................................................................................................................................. 32

### Getting Help ............................................................................................................................. 33
- Customer Support ...................................................................................................................... 33
Getting Started

Welcome!

IntelliConnect® is a robust, innovative program that provides you with all of the research tools you need to find the right information for your business needs. With state-of-the-art features and a seamless integration of high powered technology, you’ll have the flexibility, tools, and know-how to complete your research quickly and easily.

Logging into IntelliConnect

To log into IntelliConnect from your Web browser:

- Point your Web browser to http://IntelliConnect.CCH.com

The following Log In screen displays.

- At the Login Page, type your User ID (usually your email address) and password.
- Click the Log In button.
The Search Bar

At the top of the main IntelliConnect window, and directly below the Navigation Bar, is the **Search Bar**. It is conveniently available on each screen, giving you the flexibility to perform a search from anywhere. On the search bar, you can perform the following tasks:

- Type your **search expression**.
- Select from a variety of **search scopes**.
- View previous **search expressions**.
- Set your **search options**.

The search bar is available on every screen.
The Quick Bar

In the top left corner of IntelliConnect is the Quick Bar. The Quick Bar contains a host of key functionalities that enable you to perform your research quickly and efficiently.

You can perform the following actions from the Quick Bar:

**Browse** — View and walk through your entire subscription.

**Citations** — Locate specific documents using their citations.

**Citator** — Track cases and rulings if available in your subscription.

**Research Folders** — Save important documents for later use.

**Tracker News** — Set up and view the latest tax and business law news.

**Practice Tools** — Access important productivity tools.

The Navigation Bar

At the top of the main IntelliConnect window is the Navigation Bar. The Navigation Bar contains a host of helpful links that allow you to quickly access the Document Tray or view and modify your research experience.

- Set up specific areas for research.
- End your research session.
- View your research history.
- Click to access online help.
- Temporarily store your research documents.
- Set your Preferences.
- Click to close all tabs.
Searching All of Your Subscription Content

You can search your entire subscription by simply typing your search term(s) in the Search Expression box. By default, you will automatically be searching for all content.

- Type your search terms (e.g., *home office deduction*) in the Search Expression field at the top of any screen.

- Make sure that **all content** is selected in the Search Scope box.

- Click **Go**.

Your search results display in the right pane on a new tab, which is labeled according to your search expression.

**TIP:** When you search your entire subscription, the system also searches within any **Practice Tools** that are part of your subscription.
Maintaining Multiple Search Tabs

With IntelliConnect, you can maintain up to eight searches at once. Each search is available on a separate tab, and you can quickly move back and forth between tabs just by clicking on them.

There is also a “system tab.” This tab is reserved for features such as Browse, Citation Search, Citator, History, Research Folders, and Document Tray.

Using Filters to Narrow Your Search

You can narrow your results by using filters. Filters, which appear in the left pane, break down the results returned into smaller, more meaningful categories so that you can easily manage your results.

To use the filters:
- Use the “+” and “−” icons to expand and collapse the filters.
- Click on a filter in the left pane and the results for that filter display in the right pane.

Filters are available in the following categories:
- **Document Type** — You can filter your results so you can see them by document type, such as Explanations, Laws, and Regulations.
- **Practice Tools** — When you run a search with the search scope set to all content, all of the Practice Tools (Smart Charts™ and Toolkits) included in your subscription are searched and tools matching your search expression appear in your results list. You can filter your results just to include the Practice Tools located by your search found.
- **Library** — If you prefer to see where your search results are located within the content sets, you can use the Library filter. You can walk through the libraries in your subscription, for example, Federal Tax, Securities, or Pension, to see where the hits are found in context.

- **State Tax Type** — If you are a state tax researcher, you can filter your results by the various state tax types, such as Sales and Use and Corporate Income.

- **Jurisdiction** — You can limit your results by jurisdiction — Federal, any combination of states, and any combination of International jurisdictions. Just click on By Jurisdiction, and a pop-up window will appear. Click any combination and your results will be re-sorted to include just the jurisdictions you selected.

---

**Using multiple filters simultaneously**

You can apply any of the filters at the same time to further narrow your results. For example, if you are a state tax user, you can select a document type to narrow by a state tax type, and specific jurisdictions — all at once.

Once you select a filter within a category, you will only see the filter you selected. To see additional filters in that category, just click the title of the category again.

You can also see the filters you selected at the top of the right pane in the “You’ve Selected” section.
Changing Your Search Scope

To change your search scope, just click the Search Scope drop-down menu and select a search scope. Here are the search scopes available on IntelliConnect:

- **all content or selected practice areas** (depending on your Practice Areas settings)—searches all of the content in your subscription (or selected Practice Areas).
- **within results**—searches just the results from the active search tab (see below for details).
- **selected content**—searches just the items you have selected (i.e., clicked checkboxes) within the Browse tree.
- **this document**—searches just the active document on the screen.
- **citations**—searches for documents using a complete citation.

**To search within your Search Results:**

- With your search results displayed, click the Search Scope drop-down menu and select **within results**.

Select within results from the Search Scope drop-down menu.

- Type a new search expression in the Search Expression field.
- Click Go.

IntelliConnect searches for your new search expression within the search results of the selected search, and your results display. The tab name will change based on the new search terms.
Using Search Options

In addition to IntelliConnect’s powerful search functionality, you also have the ability to set specific search options. You can apply a thesaurus to your search, look up the synonyms of search terms, or search according to a specific set of dates.

From the “Search Options” box you can even access your saved searches!

**To set Search Options:**

- Click the **Search Options** link located to the right of the Search Expression field.

  - Click in the checkbox to apply the Thesaurus to your searches.
  - Type the term you want to find synonyms for here.
  - Click Search Now to run your search immediately.
  - Click Apply Changes to save your changes for all subsequent searches you run.
  - Click here to see Search Options.
  - Click to view saved searches.
  - Synonyms will display here.
Viewing Search Results and Documents

Your search results appear in the right pane of your screen.

Click a page number to view other results pages.

Click the down arrow to change the number of hits per page.
Viewing Documents Using the Split-Screen View

When you click on any document on the list, the document will open in a preview pane at the bottom of the right pane. The top pane on the right side will display the search results, so you can easily walk through the results in the top pane and see the document text on the bottom.

The split-screen view lets you quickly scroll through lists to find documents of interest and evaluate multiple documents more quickly, without having to navigate back and forth between separate screens.

To preview a document from your search results:

- With search results displayed on your screen, click the link of the document you want to open.
Locating Related Information

The **Related Information** feature is a smart cross-reference feature that links you to documents relevant to the documents you are currently viewing. Note that Related Information buttons do not appear in all documents — only in selected documents based on your subscription.

**To display a list of Related Documents:**

- With a document onscreen, click the **Related Information** button. A list of related documents within your subscription (relevant to your current onscreen document) displays. Note that a new tab — **Related Results** — opens, and the related documents display on this new tab.

**To locate specific related information by document type or by category:**

- At the Related Results tab, click through the filters on the left to locate related documents — related explanations, annotations, laws, regulations, and cases.
- When you find a document of interest, click on its title and the document will open in the preview pane.
Browsing Your Product Content

IntelliConnect makes it easy to find information of interest to you by allowing you to browse the product content to which you subscribe. You browse your product content directly from the Browse tree, which is an organized list of all of the content to which you subscribe. The Browse tree is located in the left-hand pane of the main IntelliConnect page.

To browse your product content:

- Click the plus “+” icon to the left of a content area of interest on the Browse tree.

**NOTE:** If you have navigated away from the main page of IntelliConnect and the Browse tree is no longer displayed, simply click the **Browse** link (or icon) located on the Quick Bar (or click the **Home** link).

![Click the “+” and “-” icons to expand and collapse the Browse Tree. Continue to drill down through the content until you reach the document level for a specific section.]

Searching from Browsed Content

After you browse for content (and locate subject areas in which you have interest), you can still perform a search to further refine your results.

- Click in the checkboxes next to the items on the Browse tree you want to target for your search.
  **NOTE:** When you click in a checkbox on the Browse tree, the search scope automatically changes to selected content.

- Type your search terms in the Search Expression field.

- Click **Go**.

**TIP:** To quickly collapse all the items you have expanded on the Browse tree, simply click the **Collapse All** button.
Viewing a Document List

While browsing your product content on IntelliConnect, you may find sections of your content on the Browse tree that contain many documents in which you have interest. You can click to select individual documents you want to view, or you can choose to display an entire list of the documents contained in the selected section.

To view a document list:

- Click the plus “+” icon to the left of a content area of interest on the Browse tree.
- Click in the checkbox(es) next to the content areas you want included in the document list.
- Click the Document List button.

The list of documents from the content areas you selected displays in the “Search Results” pane.

There may be times when you would like to add additional content areas to the document list.

To add additional content to a document list:

- With a document list displayed in the “Search Results” pane, click in the checkbox(es) next to any additional content areas you want included in the updated document list (without deselecting any of your current selections).
- Click the Document List button.

The document list is updated to include the additional content you selected.
Browsing Your Publication Titles (Titles A–Z)

With IntelliConnect, you have another way to quickly find material pertinent to your research: Title A–Z!

Titles A–Z is an alphabetized list of all the titles included in your subscription. If you know the title of the specific publication within your subscription you want to view, Titles A-Z gives you a quick and easy way to access that particular publication.

To browse your publication titles:

- Click the **Titles A–Z** button, which is located at the top of the Browse tree (and below the Quick Bar).

**NOTE:** If you have navigated away from the main page of IntelliConnect and the Browse tree is no longer displayed, simply click the **Browse** link (or icon) located on the Quick Bar (or click the **Home** link).

- Scroll through the list of publication titles, which are listed alphabetically until you find a publication of interest.

— Or —

- Click one of the links located above the list of publications to quickly “jump” to that particular section of the list.

- Once you find a publication of interest, simply click the publication title link to quickly go to that particular location of the selected publication within the Browse tree.

In other words, once you click a publication title link, the Browse tree expands to the exact location of the publication title you selected, allowing you to quickly find documents of interest.

**TIP:** Publication titles that are grayed out indicate that those titles are outside the scope of your current practice area selections.
Searching Your Publication Titles (Titles A-Z)

With IntelliConnect, you can search all of the publication titles within your subscription. In other words, you can search your Titles A-Z!

Titles A-Z is an alphabetized list of all the titles included in your subscription. If you know the title of the specific publication within your subscription you want to view, Titles A-Z gives you a quick and easy way to access that particular publication.

To search your publication titles:

- Click the **Titles A-Z** button, which is located at the top of the Browse tree (and below the Quick Bar).

**NOTE:** If you have navigated away from the main page of IntelliConnect and the Browse tree is no longer displayed, simply click the **Browse** link (or icon) located on the Quick Bar (or click the **Home** link).

- Type your search terms in the Title Finder field.

As you type your search terms in the “Title Finder” field, the list of publications is filtered to only those titles that match your search terms.

As you type a search term in the Title Finder field, the list of publications is updated to include only those publications that include your terms.
Searching By Citation

You can search for documents by citation, either by entering the entire citation on the search bar or locating the appropriate citation format within the available citation templates.

To search for a citation when you know the entire citation format:

- Click the Search Scope drop-down menu and select citations.

- Type the citation reference you wish to search for in the Search Expression box. For example, Reg. Sec. 1.1001-1(a).

  **TIP:** If you have previously searched for this particular citation, click the Search Expression drop-down menu and select it from the list of previously used search expressions.

- Type the entire citation — including the citation format and number — in the Search Expression field. For example, Reg. Sec. 1-1001-1(a).

- Click Go.

The document or a list of documents appears in the right pane.

To search for documents by citation:

- Click the Citations link (or icon) on the Quick Bar.

- Click the plus “+” icon to the left of a content area of interest on the Find by Citation menu (which is shown in place of the Browse tree in the left pane).

- Continue to expand areas of interest until you find the type of citation format you need for your search, e.g., Reg. Sec.

- Type the citation number in the appropriate field, e.g., 1.1001-1(a).

- Click Go.
Tracking Cases and Rulings with the CCH Citator®

You can track the history of cases and rulings through the legal process by using CCH Citator. The Citator link will appear in the Quick Bar only if it’s available in your subscription.

The CCH Citator can 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.

**To locate a citator listing when you know the citation reference of the case or ruling:**

- Click the **Citator** link (or icon) on the Quick Bar.

All of the Citator templates to which you subscribe display in the right pane.

**TIP:**

You can browse the Citator formats included in your subscription by clicking the “+” and “−” icons to expand and collapse the menu items. After locating an area of interest, click the menu item to view associated Citator formats in the right pane.

- At the top of the Citator template, enter the complete citation reference in the “Enter a complete citation” field (e.g., *Revenue Ruling 99-1*).
- Click **Go**.

**To locate a citator listing when you know the name of the case or ruling:**

- Click the **Citator** link (or icon) on the Quick Bar.

All of the Citator templates to which you subscribe display in the right pane.

- At the top of the Citator template, enter the name of the case in the “Enter a case name” field (e.g., *Brown v. Godwin*).
- Click **Go**.

**To locate a citator listing when the case is on your screen:**

- With the case or ruling onscreen, click the **Citator** link (or icon) on the Quick Bar.
Recordkeeping

Printing Documents

With IntelliConnect, you can print an individual document or multiple documents from your search results list. You can print documents in either PDF or RTF text format.

To print an individual document:

- Click the **Print** menu and select **Print as PDF** or **Print as text**.
- If you select **Print as PDF** the document is displayed in a new browser window, but the Print dialog box is not immediately displayed.
- Click the **Print** icon, or click the **File** menu and select **Print**.

— Or —

- If you select **Print as text**, the document displays in a new browser window.
- On the Print dialog box, select your print settings and click the **Print** button.

To print documents from a search results list:

- Click in the checkboxes next to the documents you want to print.
- Click the **Print** menu and select **Print selected as PDF** or **Print selected as text**.

You can also print the individual document.
Emailing Documents

With IntelliConnect, you can email a document of interest to another person.

- With the document you want to email open, click the **Save/Email** menu and select **Email document**.
- Type the email addresses to which you want to send the document in the spaces provided.
- Type the subject heading and email message in the appropriate fields.
- Click the **Send** button.

Saving Documents

While performing research with IntelliConnect, you can save a document to allow you to view it after you end your research session. You can save a document as a PDF or RTF text file.

- With the document you want to save open, click the **Save/Email** menu and select **Save as PDF** or **Save as text**.
- Click the **Save** button.
- Select the location to which you want to save the file, type the name for the file in the “File name” field, and then click the **Save** button.

Once you click the Save/Email menu, you can save the document as a PDF or RTF text file, or you can email the document.
Using the Document Tray

While performing research on IntelliConnect, you may find documents of interest that you want to view later during the same research session. You can temporarily save these documents for later viewing by using the Document Tray.

To send documents from a search results list to the Document Tray:

- With the document you want to send to the Document Tray open, click the **Send to Tray** link located at the top of the document.

  — Or —

- From your search results or a document list, click in the checkboxes next to the documents you want to send to the Document Tray and click the **Send to Tray** link.

To view documents in the Document Tray:

- Click the **Document Tray** link at the top of the screen.

You can print, save, and email documents you have added to the Document Tray, and you can add them to your Research Folders. When you no longer need a document you added to the Document Tray, you can simply remove it.
Saving Links to Documents and Other Content

You can save external links to documents and specific product content.

To save an external link to a document:

■ With the document you want to save the link for open, click the Save/Email menu and select Save link to document.

■ The URL for the selected document is copied to your Windows clipboard and a confirmation message displays.

■ Click OK to close the confirmation message dialog box. You can paste the URL you copied to your clipboard into another application for quick access to the document.

To save an external link to product content menu item:

■ Click the Browse link (or icon) on the Quick Bar.

■ Click in the checkboxes next to content areas on the Browse tree.

■ Click the Save Links to Content icon located in the top of the Browse tree. The items you selected — along with their associated URLs — display in a separate Save Links to Content dialog box.

■ Click the Copy selected URLs to Windows Clipboard button to copy the selected URLs to your clipboard (from which you can paste into another application).

Using Research Folders

You can use Research Folders to save and organize documents you find during your research session.

To access Research Folders:

■ Click the Research Folders link (or icon) on the Quick Bar.

The folders you have created are listed in the left pane.

■ To view the contents of a folder, click the folder name. All of the documents saved to that folder display in the right pane.

To create a new Research Folder:

■ Click the Create new folder link.

■ Type a name for the folder and click OK.
To save documents to Research Folders:

- If you have a document on your screen that you want to save to a research folder, click the Save/Email menu and select Save document to Research Folders.

- If you have existing Research Folders, you can select an existing folder or create a new folder, or if you have not yet created any Research Folders, type a name for the new folder in the space provided.

**TIP:** If you want to save multiple documents from a search results list to a Research Folder, click in the checkboxes next to the documents you want to save, click the Save/Email menu, and select Save selected to Research Folders.

NOTE: Documents you store in Research Folders remain indefinitely until you delete them or delete the Research Folder itself.
Reviewing Your Research History

IntelliConnect keeps a record of the recent searches you have performed and keeps track of the documents you have viewed while performing your research (whether by browsing or searching) within a feature called History.

The History feature keeps a 60-day record of the searches you have performed and the documents you have viewed.

You can use History to view recent research activity (i.e. recently run searches, recently viewed documents, etc.), but you can also use History to re-run recent searches, send documents to a Research Folder or to the Document Tray, print or save selected documents, and even print a copy of your recent research activity.

To view your research history:

- Click the **History** link at the top of the screen.

![Image of History feature with recent documents and search results]

You can view recent documents or recent searches.

Click the down arrow to select and view a specific time frame of research history.

Click to view your research history.
Working with Favorites

As you browse your product content in IntelliConnect, you may find specific areas of your content that you research frequently. Just as the Document Tray can be used to “park” documents of interest for later viewing, My Favorites can be used to organize those publications you research most frequently.

Once you save content to My Favorites, you access that particular content even more quickly the next time you log on to IntelliConnect.

To browse My Favorites:

■ Click the Browse link (or icon) on the Quick Bar.

■ The My Favorites section is located at the top of the Browse tree and is shown expanded by default. Click the “+” and “–” icons to the left of items you have added to My Favorites to expand and collapse the items.

TIP: You can search items in My Favorites just as you would any other content. Click in the checkboxes next to the items in My Favorites you want to search, type your search terms in the Search Expression field, and click Go.
Working with Tracker News

With **Tracker News** you can set up automated daily searches for new articles so you keep on top of the latest developments. You can have Tracker News results sent directly to you by email, you can view them on IntelliConnect, and you can have Tracker News results delivered via an RSS feed straight to your RSS reader.

**To add a Tracker:**

- Click the **Tracker News** link (or icon) on the Quick Bar.
- Click the **Add/Modify Trackers** link located at the top of the left pane under the “Tracker News” heading.
- Click in the checkbox(es) next to the Tracker(s) you want to add, and then click the **Add Tracker(s)** button located at the bottom of the page.

**TIP:** Click the **Target** icon to the left of any Tracker you want to add to customize it.

If you have already added a Tracker, the Tracker is added to the list of Trackers to which you subscribe (and is added to the list of Trackers under the “Tracker News” heading on the left pane). If, however, this is the first time you have added a Tracker, the “Tracker News Delivery Setup” dialog box displays.

- Click in the checkbox next to **I would like to receive Tracker News via email** if you want your Tracker News results sent to you in an email.
- If you chose to have your Tracker News results sent to you in an email, type your email address and user name in the spaces provided.
- Click **OK**.

The Trackers you have added are listed, along with the number of results returned by the search. Click a Tracker from the list to view the results.
To change Tracker delivery options:

- Click the **Tracker News** link (or icon) on the Quick Bar, and then click **Add/Modify Trackers**.
- Click the **Delivery Options** link.

The “Tracker News Delivery Options” dialog box is displayed, allowing you to set your email delivery and content options. You can also find the link needed by RSS readers to receive your Tracker News via your RSS reader.

Click the **Delivery Options** link to set your Tracker News delivery options. Click in the checkbox to receive your Tracker News updates via email.

You can copy and paste the URL into your RSS reader to receive the selected Tracker updates via RSS feed.
To modify a Tracker:

- Click the **Tracker News** link (or icon) on the Quick Bar, and then click **Add/Modify Trackers**.

The main “Tracker News” page is displayed on the “Tracker News” tab, and any Trackers to which you subscribe are listed under the “Tracker News” heading on the left pane.

- Click the **Target** icon to the left of the Tracker you want to modify.

- Make any desired changes by checking and un-checking checkboxes.

- Click **OK** when you are finished.

To delete a Tracker:

- Click the **Tracker News** link (or icon) on the Quick Bar, and then click **Add/Modify Trackers**.

- Click the **Delete** icon to the left of the Tracker you want to delete.
Practice Tools

In addition to your regular product content, IntelliConnect provides you with a variety of helpful tools, including lookups, toolkits, calculators, and other quick reference aids.

There are over 200 Practice Tools available within IntelliConnect, and the Practice Tools available to you is based on the details of your subscription (i.e. the content to which you subscribe).

TIP: Be sure to turn off your browser’s pop-up blocker (if enabled) before opening a Practice Tool.

To open a tool from the Quick Bar:

- Click the Practice Tools link (or icon) on the Quick Bar.

- Click the plus “+” icon to the left of a content area of interest on the Browse tree.

- Click the title (or Practice Tool icon 🌟) of the Practice Tool you want to open.

After locating a Practice Tool you want to open, click the link or icon.
To open a tool from a Search Results list:

NOTE: When you search your entire subscription, any Practice Tools that are part of your subscription are included in the search.

- With your search results displayed in the “Search Results” pane, click the title of the Practice Tool that you want to open.

— Or —

- Click the “+” icon to the left of the Practice Tools filter in the Browse tree to expand the section and display the Practice Tools organized by content area. Continue to click the “+” and “-” icons to the left of headings to expand and collapse the sections until you find a Practice Tool of interest.
- Click the title (or Practice Tool icon 🕌) of the Practice Tool you want to open.

To open a tool from the Browse menu tree:

- Click the Browse link (or icon) on the Quick Bar.

- Click the “+” icon to the left of the “Practice Tools” heading to expand the section and display the Practice Tools organized by content area. Continue to click the “+” and “-” icons to the left of headings to expand and collapse the sections until you find a Practice Tool of interest.
- Click the title (or Practice Tool icon 🕌) of the Practice Tool you want to open.
Preferences

With IntelliConnect, you can set individual search, document, help, and browse preferences.

Setting Your Preferences

To set your preferences:

■ Click the Preferences link at the top of the screen.

■ Select or deselect checkboxes (or radio buttons) in the various sections of the “Preferences” dialog box to set specific preference settings.

■ Click OK to save your changes and close the “Preferences” dialog box.

Customize the preference settings to suit your needs by selecting and deselecting the various options.

NOTE: Once you change your preference settings, the updated settings are maintained for all subsequent research sessions even if you log off of IntelliConnect.
Practice Areas

Your IntelliConnect subscription gives you access to business-specific content areas called, Practice Areas. Practice Areas are the main content areas (or libraries) within your subscription, from which you can browse or do research.

To change your Practice Area settings:

- Click the **Practice Areas** link at the top of the screen.
- Or —

If you have already selected Practice Areas, click the **practice areas** link located above the Browse tree (right below the Quick Bar).
- Click the plus “+” and minus “−” icons to the left of Practice Areas to expand or collapse the menus.
- Click in the checkboxes next to the Practice Areas you want to include in the Browse tree.
- Or —
- Clear the checkboxes next to the Practice Areas you want to remove from the Browse tree.
- Click **OK** to save your changes.
My Profile

You can easily make changes to your User ID, password, and your IntelliConnect display name (which is used in items such as Tracker News emails).

To edit your profile:

- Click the Preferences link at the top of the screen.
- Click the My Profile tab.
- Click the Edit button.
- Type your current password in the “Enter your current password” field. (Note: To make changes to any of the profile settings, you must supply your current password.)
- Make any necessary changes to your password, User ID, or display name settings.
- Click OK to save your changes.
- Click the click here to continue link to return to the “Preferences” dialog box.
- Click OK to close the “Preferences” dialog box.
Getting Help

IntelliConnect’s resourceful help system provides you with a wealth of information to assist you in learning how to use all of IntelliConnect’s powerful features.

To access the help system:

- Click the Help link at the top of the screen.

You can also access various links on the “Home” page that provide you with demos, as well as links to customer support.

Customer Support

If you have any questions about IntelliConnect, please do not hesitate to contact our team of specialized Customer Support personnel.

For assistance with research or functionality, please contact 800-344-3734.

If you are having technical difficulties accessing the site, please contact 800-835-0105.

You may also visit Support.CCH.com/Chat