

THE LINE IS ALWAYS MOVING

Tolley[®]Library
Protecting tax
professionals on
The Front Line

tolley.co.uk/librarytraining

Tolley[®]

Tax intelligence
from LexisNexis[®]

A BRIEF USER GUIDE

Life as a practitioner can be busy, that's why we've made it easy for you to get to grips with Tolley®Library with our quick user guide below. If you do have some spare time and are looking for something to read, flick through the more detailed user guide found overleaf to get the most out of our Tolley®Library product.

Tolley®Library Quick Tips:

Searching

The searching is natural language; as with popular online search engines, simply type the string of words you are interested in and hit search. You can use the broad search box at the top of the page and use the left filter button to narrow by content set. Alternatively, you can run advanced searches using the Search pod where you can use content specific search fields to enter partial information you may have.

Results Page

The 'Search within results' box enables you to enter further keywords to search within your current set of results. Beneath this, the filter boxes allow you to quickly narrow your results according to a specific content type, source or topic.

The Bookshelf

The bookshelf enables you to quickly browse or search across just one or a handful of your favourite titles. The 'Browse' button underneath a title will open the table of contents and allow you to read through it like a book on screen. You can easily add any title from your subscription to your bookshelf by clicking on the 'My Current Library' link and remove them by clicking on the 'X' button, and change the order they appear in by dragging and dropping the titles in the order you want them.

Tax News

This page allows you to see all news results in one place and also includes a dedicated search function. Each homepage has a breaking news news-pod and space for three more. You can change which news-pods appear on the page by clicking on the 'Edit' button.

Alerts

To create an alert, click on the three-stage wizard that appears on the screen. You can create alerts by either going to the 'Alerts' tab or by clicking on 'Create Alerts' on the results page.

My Documents

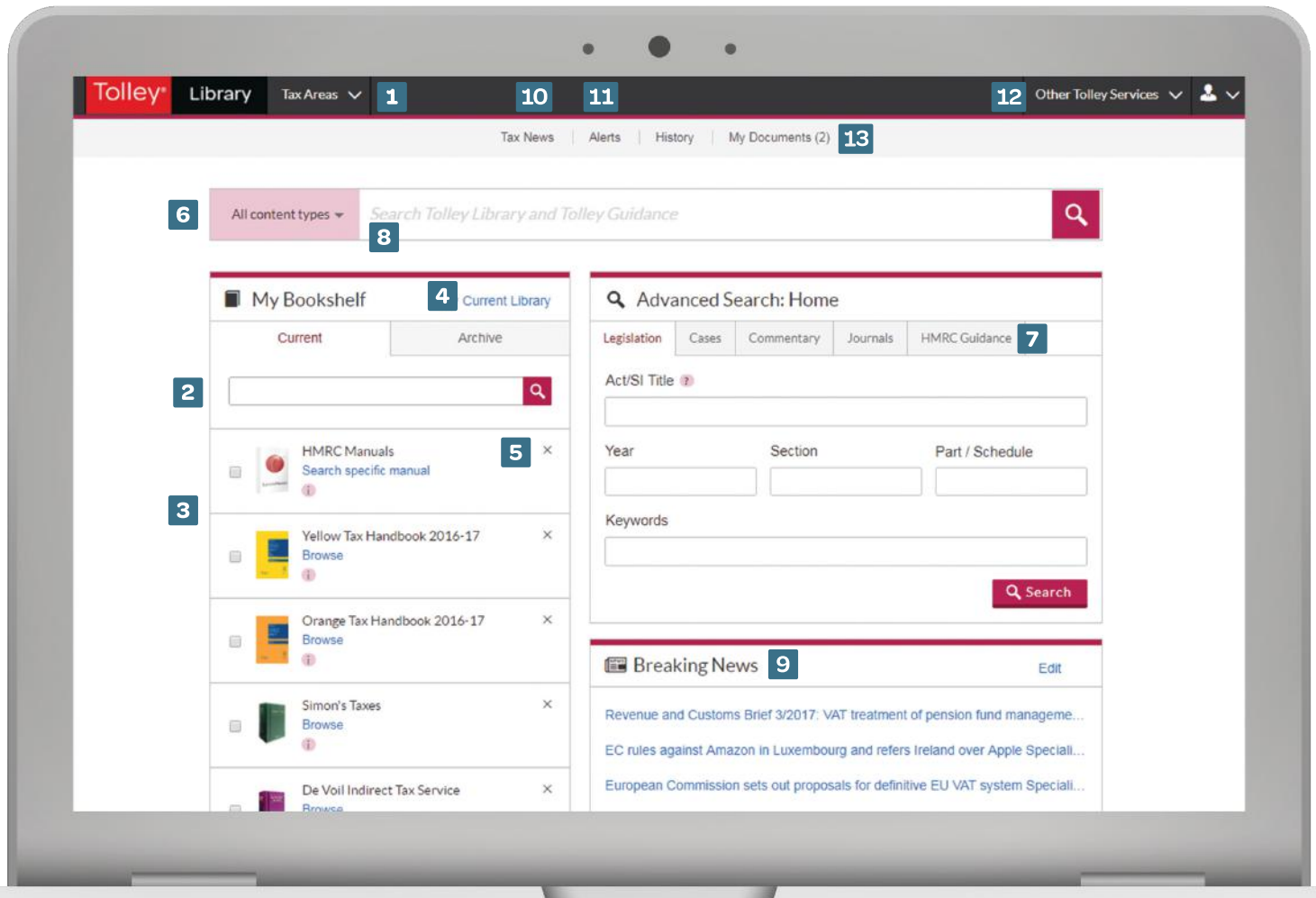
This feature stores the most updated version of up to 100 documents you require quick access to in one place. If documents on the system are updated or deleted, this will be replicated in your 'My Documents' ensuring that you are kept up to date with the latest changes and to help minimise potential risk. You can add a document to 'My Documents' by clicking on (+) in the search results, or 'Add to My Documents'. These can be easily deleted, emailed, downloaded and printed, saving you valuable searching time.

Search History

View all of your searches from the last seven days, allowing you to get instant access to your most recent searches. Only searches that returned results are stored in History and "No documents found" searches are not displayed ensuring you only get the most relevant results.

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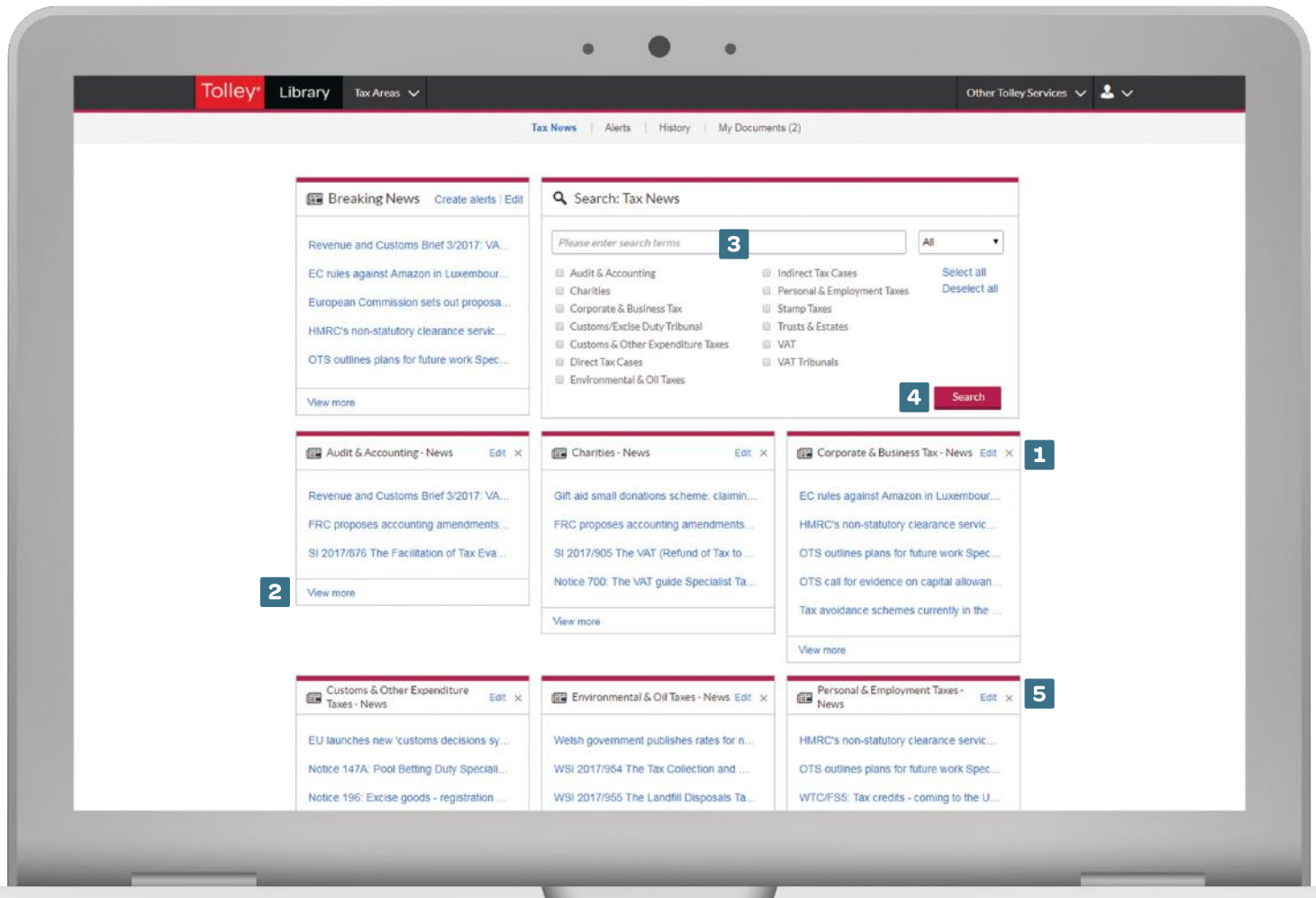
Homepage



- 1 Tax Areas: click on the downward arrow to access practice area home pages. We have already pre-populated the bookshelf with default titles and set up appropriate news-pods but you can amend these to suit your own needs.
- 2 Bookshelf searching: select the titles you wish to search across and enter keywords into the search box.
- 3 If you only choose titles that contain a particular document type (such as legislation), the search box fields will change to reflect your choice.
- 4 To add more subscribed titles to the bookshelf, click the My Current Library link to open the full list. Check the boxes next to the titles you wish to add and then click OK.
- 5 To remove a title from your bookshelf, click the 'X' icon then click OK. You can also change the order in your bookshelf by dragging and dropping the books to the required position.
- 6 The main search box on the homepage searches across your whole subscription. If you wish to narrow your search to specific content types, you can click on the left filter button to select content such as legislation, cases or HMRC guidance. The natural language search means you type a string of keywords without using connectors or Boolean operators.
- 7 The search tab allows you to narrow your search to one specific document type. The search box will adjust with each tab to introduce additional search fields that enable you to search with precision.
- 8 If you wish to search for a couple or multiple content types, under the All tab use the tick boxes to specify what you need to search across.
- 9 The Breaking News pod shows the latest news across all tax areas. Beneath this are area-specific news pods, which can be replaced using the 'Edit' button.
- 10 The Tax News tab takes you to a page displaying news across all areas. The page has a dedicated search function to search specifically for current awareness.
- 11 The Alerts tab allows you to set up news alerts or view previously created alerts and scheduled searches.
- 12 Access additional platforms using the Other Tolley Services dropdown and modify your personal settings using the user icon on the right.
- 13 The My Documents folder is a useful way of saving any pages found through searching or browsing and are kept for 30 days.

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Tax News Page



To view bite-sized help videos that demonstrate how this functionality works please click on the video icon in the top right of the product or visit: tolley.co.uk/librarytraining



- 1 Scroll down the page to view the latest news in each news-pod.
- 2 Click on **'View more'** to expand each news-pod.
- 3 Use the search box to search within the news page. The check boxes can be used to limit your search to one or more area(s).
- 4 Searchable news by topics.
- 5 Click **'Edit'** on any news-pod to add or remove news-pods from your news screen.

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Results

The screenshot shows the Tolley Library search results page for 'Entrepreneurs' relief'. The page is divided into several sections:

- Top Bar:** Includes the Tolley logo, 'Library', 'Tax Areas', a search bar with the number 10, and 'Other Tolley Services'.
- Navigation:** 'Tax News', 'Alerts', 'History', and 'My Documents (2)'.
- Results Section:** 'Results for: Entrepreneurs' relief'. It includes a 'Narrow by' section with filters for 'Search within results', 'Content type', 'Source', and 'Topic'. The 'Content type' filter is expanded, showing options like 'Legislation' (85), 'TolleyGuidance' (80), 'Legal Journals' (57), 'Commentary' (50), and 'Magazines & Journals' (28). The 'Source' filter is also expanded, showing options like 'Yellow Tax Handbook 2016-17' (40), 'UK Parliament Acts' (37), 'TolleyGuidance Owner-Managed Business' (33), 'Taxation Magazine' (21), and 'HMRC Manuals' (18). The 'Topic' filter is expanded, showing options like 'Capital Gains Tax' (182) and 'Business Taxes' (124).
- Search Results Table:** A table with columns 'Source name' and 'Date'. It shows three results, each with a blue hyper-linked title and a brief description. The first result is 'Entrepreneurs' relief – trusts' from 'TolleyGuidance Inheritance Tax - Guidance'. The second result is 'Maximising entrepreneurs' relief' from 'TolleyGuidance Owner-Managed Business - Guidance'. The third result is 'Maximising entrepreneurs' relief' from 'TolleyGuidance Personal Tax - Guidance'.

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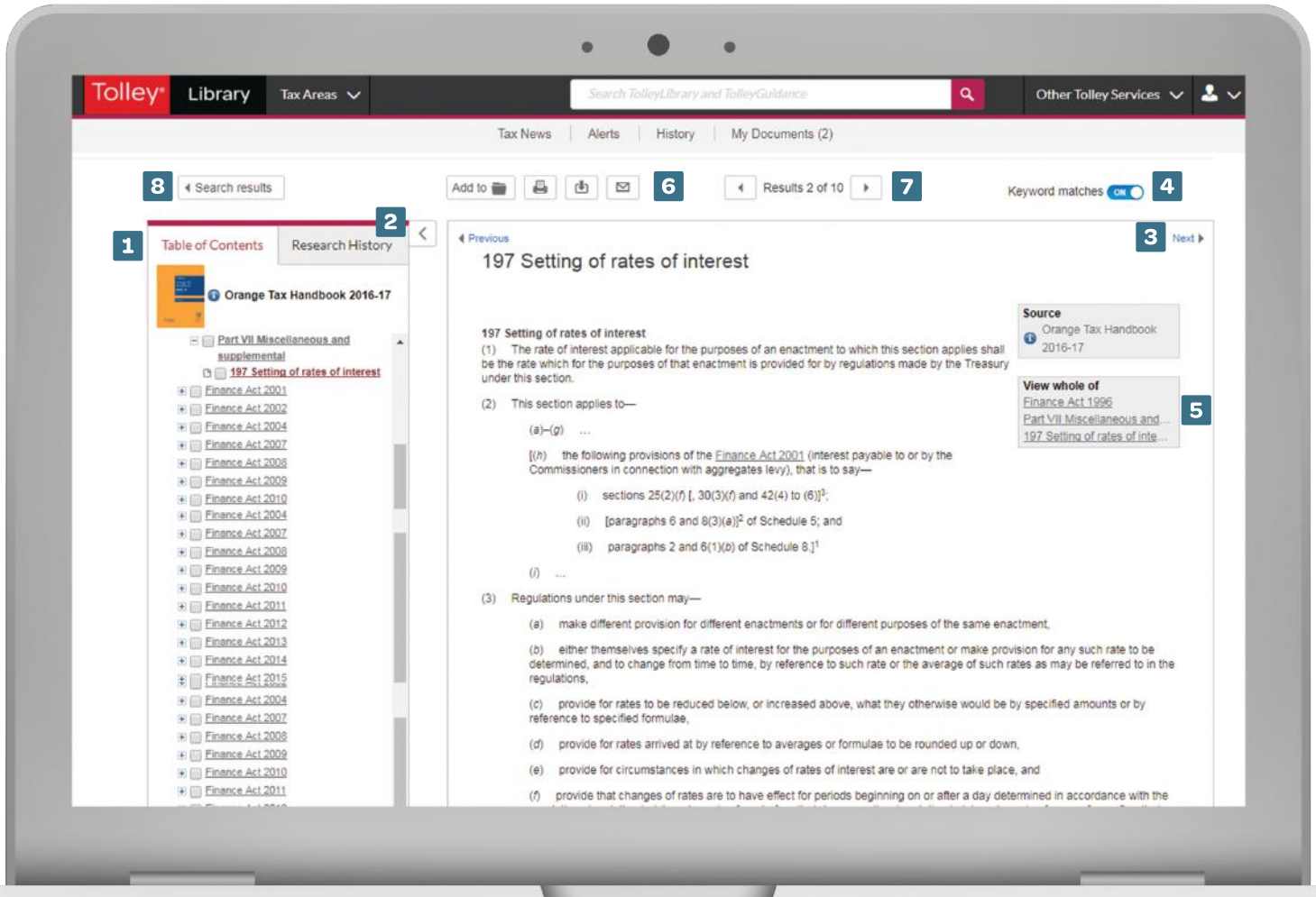


- 1 Results are by default shown in 'expanded view' to enable you to preview where your search terms are in a document. You can use this button to switch between an expanded view or a closed list.
- 2 The 'Sort by' dropdown allows you to view your results either by date or relevance.
- 3 Click on the blue hyper-linked document title to open it in the same window. Alternatively, you can right click the hyperlink to open into a new tab.
- 4 The 'next hit' link enables you to sift quickly through all occurrences of your search terms without having to open the full document first.
- 5 Use 'Search within results' to enter additional keywords or terms to search across your current set of results.
- 6 You can filter your results by Content type, Source or Topic on the left. Click 'More' to view the full lists.
- 7 'Select multiple' enables you to apply several filters within Content type, Source or Topic simultaneously.
- 8 Use the tick boxes to the left of each result to create a shortlist. Then use these delivery icons to add to your documents folder , print,  download  or email  your results.
- 9 Use 'Create Alerts' to set up an alert for new results of the search or 'Share link' to copy the current search into another document.
- 10 You can run a new search across all TolleyLibrary content using the search box at the top.

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Document Page



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- 1 Use the Table of Contents to navigate within the source you are currently viewing.
- 2 Click on the arrow tab to expand or minimize it for a larger reading pane.
- 3 The Previous and Next buttons enable you to move to the preceding or following page of the source you are currently viewing.
- 4 You can choose to turn the keyword highlights on or off using this toggle.
- 5 The link in 'View whole of' will show the whole area in which the document appears.
- 6 Access the same delivery icons from the homepage at the bottom of the document.
- 7 Click the Results arrows to navigate to the next result from your original search.
- 8 Click on the 'search results' button to close the document and return to the list of your search results.

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