

USER
GUIDE

GET TO THE BOTTOM OF TAX

Tolley®Library
tolley.co.uk/librarytraining

Tolley®

Tax intelligence
from LexisNexis®

Tolley®Library

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 this user guide.

Tolley®Library Quick Tips

Searching

The large search bar on the TolleyLibrary homepage is a keyword search; simply type the relevant keywords of any topic into the search bar and hit enter. This will run a search over all the content within your subscription for your keywords.

You can use the filter option on the left of the search bar to narrow by content set.

Alternatively, using the Advanced Search pod you can use content specific search fields to enter partial information you may have such as the title of a document.

Results Page

The filter boxes to the left of the search results allow you to quickly narrow your results according to a specific content type, source or topic. When filtering the results, you can search the within the results for additional key words at any point by using the Search Within Results bar at the top.

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 navigate to the document pages through the source's titles and headings. 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. To change the order that your sources appear on the bookshelf, click on a title to drag and drop it. Any changes you make to the order of the sources will be remembered the next time you log in.

Tax News

This page allows you to see all news results in one place and 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, navigate to the 'Alerts' tab and click on the 'Create New Update' link to begin customising your alert.

My Documents

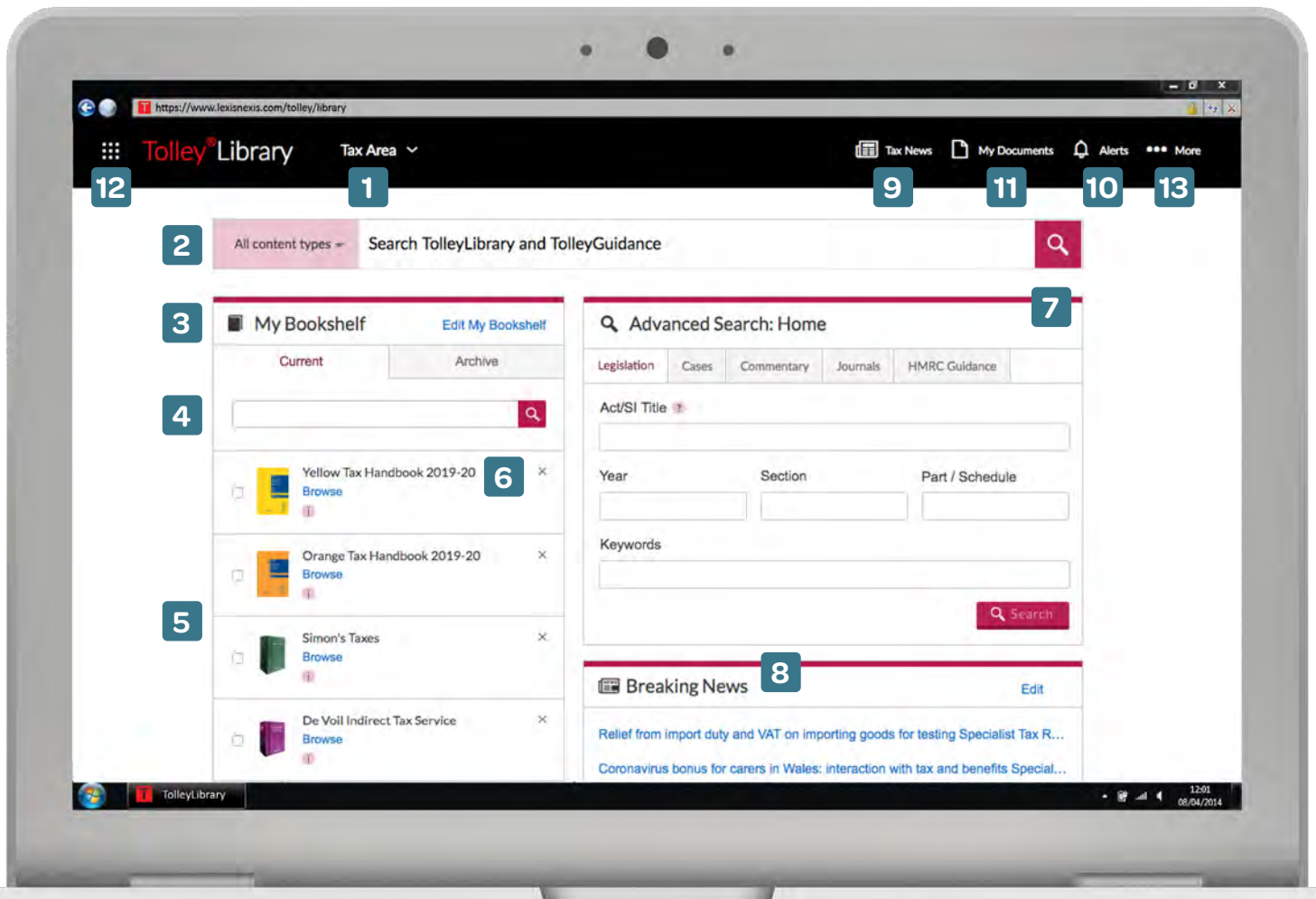
If you have saved a document, it can be found in the 'My Documents' tab for quick access. You can store up to 1000 documents in this folder and they will remain there indefinitely. You can add a document to 'My Documents' by checking the boxes in-front of each result, on the search results page, or 'Add to My Documents' when viewing a document page. These can be easily deleted, emailed, downloaded and printed, saving you valuable searching time.

Search History

View up to 100 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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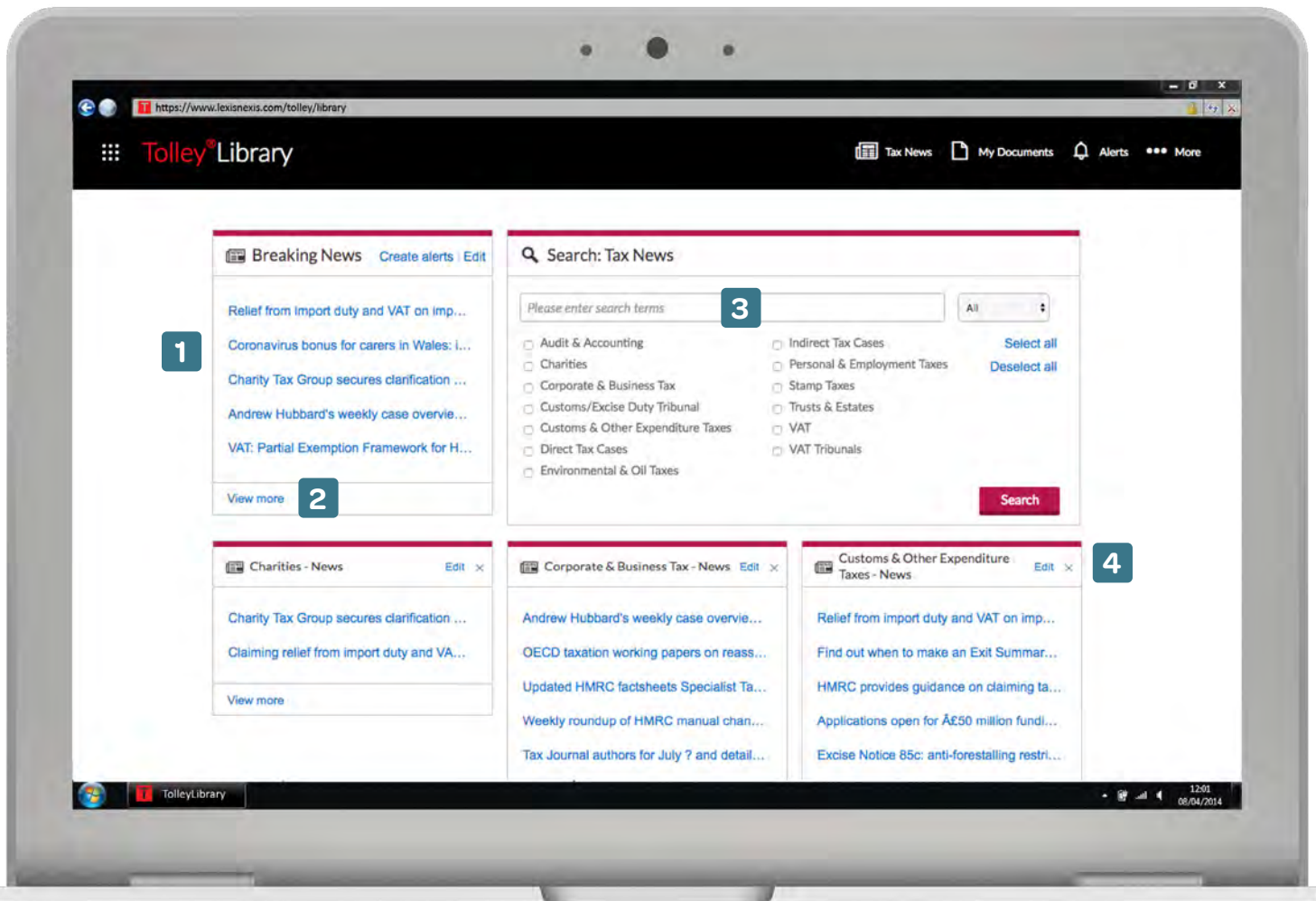
Tolley® Library Homepage



- 1 Tax Areas: click on the downward arrow to access practice area home pages. The bookshelf will adjust to include default titles, and the news-pods will be more relevant to the tax area selected. You can still amend the bookshelf and news-pods to suit your own needs.
- 2 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.
- 3 The Bookshelf contains major titles for quick access. To add more subscribed titles to the bookshelf, click the Edit My Bookshelf link to open the full list. Check the boxes next to the titles you wish to add and then click OK.
- 4 Bookshelf searching: select the titles you wish to search across and enter keywords into the search box.
- 5 If you only choose titles that contain a particular document type (such as legislation), the search box fields will change to reflect your choice.
- 6 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.
- 7 The Advances Search feature 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 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.
- 9 The Tax News tab takes you to a page displaying news across all tax areas. The page has a dedicated search function to search specifically for current awareness.
- 10 The Alerts tab allows you to set up news alerts or view previously created alerts and scheduled searches.
- 11 The My Documents folder is a useful way of saving any pages found through searching or browsing. Up to 1000 documents can be stored here for an indefinite time.
- 12 Access additional platforms using the Other Tolley Services dropdown and modify your personal settings using the user icon on the right.
- 13 The '...More' Button allows access to History as well as our Help and Support pages

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Tolley® Library Tax News Page



To view bite-sized help videos for additional assistance please click on the video icon in the top right of the product or visit:
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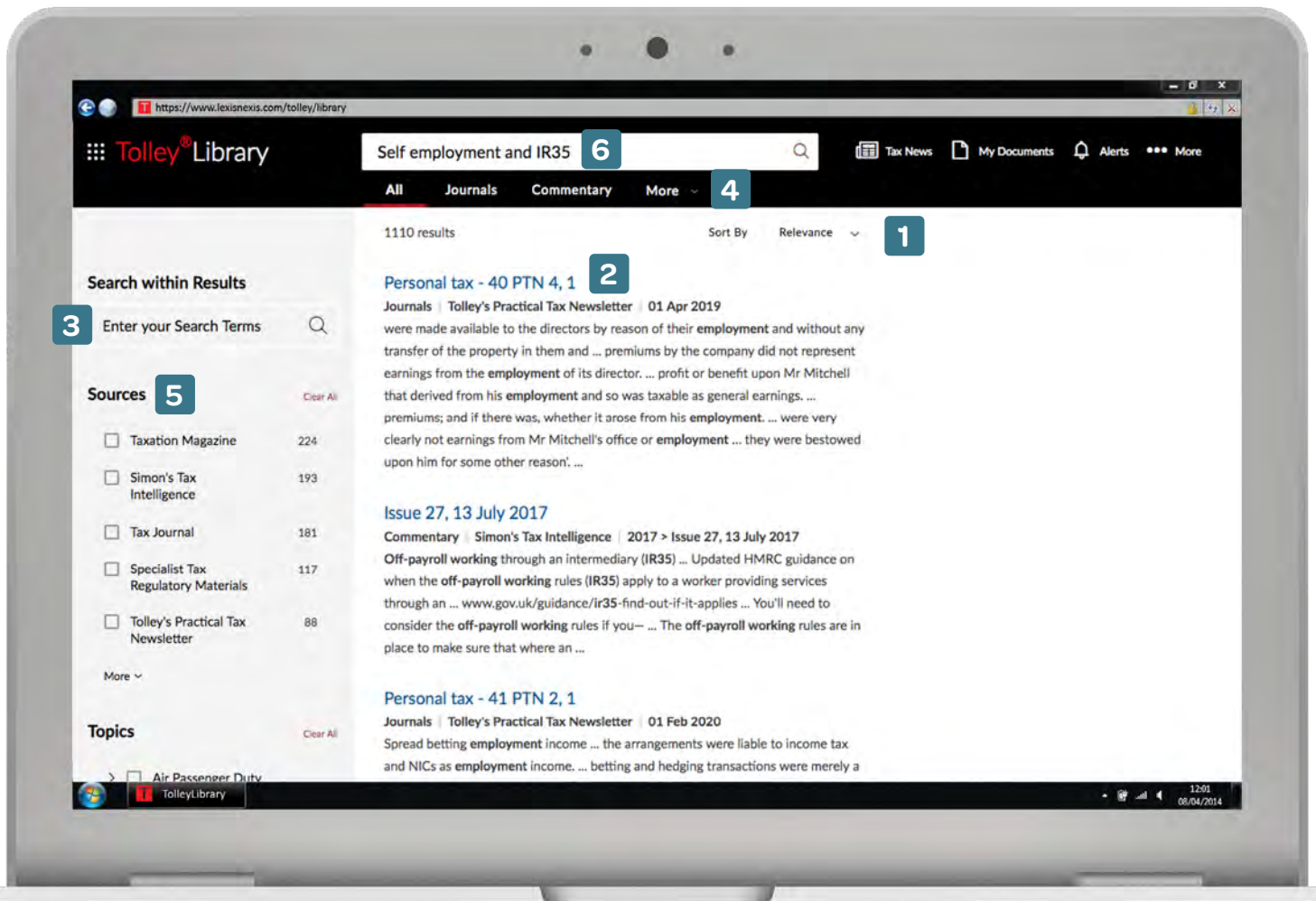


- 1 Scroll down the page to view the latest news in each news-pod.
- 2 Click on **'View more'** to expand each news-pod.
- 3 Use the search box to search within the news page. The check boxes can be used to limit your search to one or more area(s).
- 4 Click **'Edit'** on any news-pod to add or remove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

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Tolley® Library Search Results



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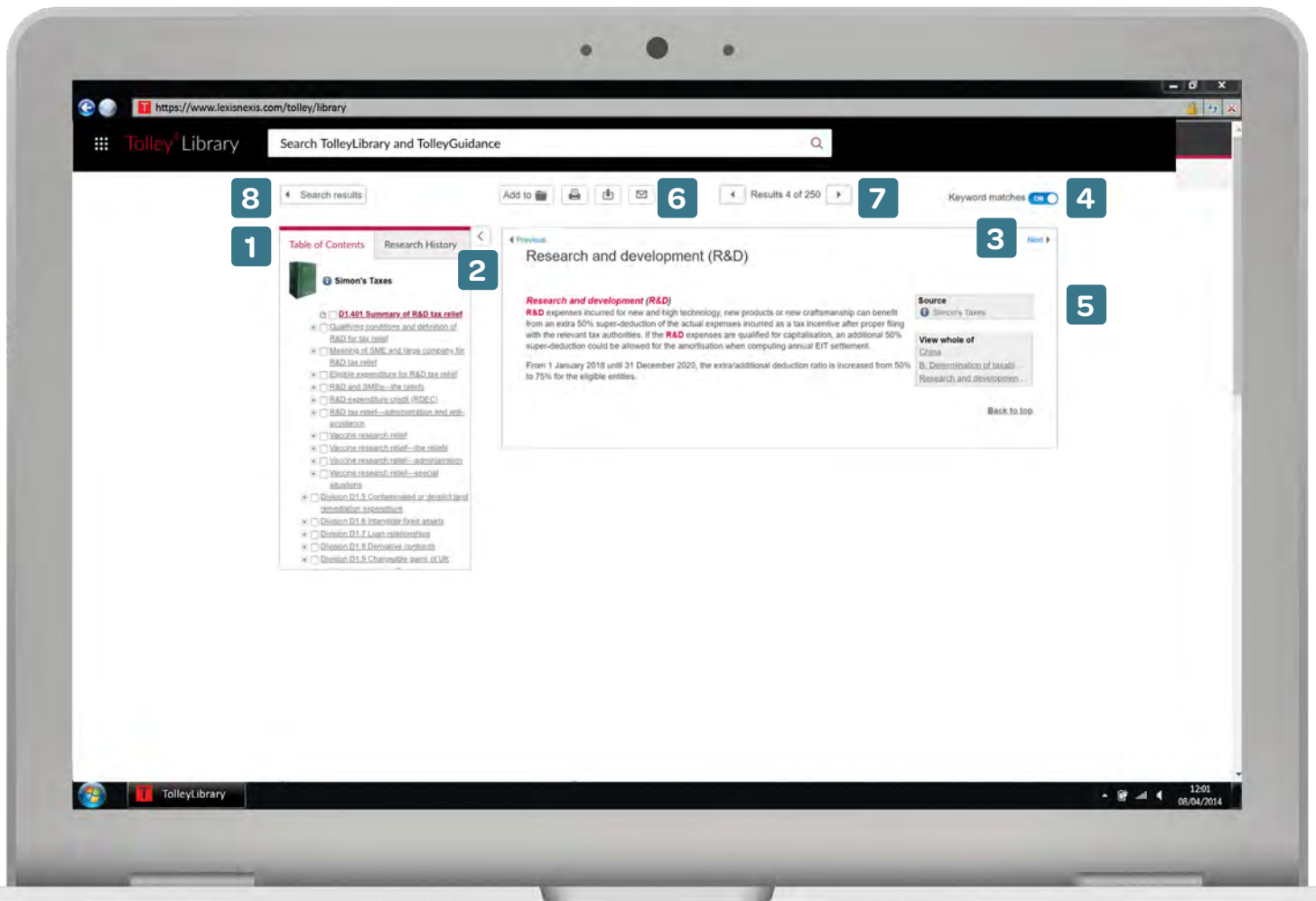


- 1 The 'Sort by' dropdown allows you to view your results either by date or relevance.
- 2 Click on the blue hyper-linked document title to open it in the same window. Alternatively, you can right click the hyperlink to open into a new tab within your web browser.
- 3 Use 'Search within results' to enter additional keywords or terms to search across your current set of results.
- 4 You can filter your results by content type at the top of the page.
- 5 You can also filter your results by sources or topic on the left. Click 'More' to view the full lists.
- 6 You can run a new search across all TolleyLibrary content using the search box at the top.

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Tolley® Library 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 The delivery icons at the top of the page can be used to add the page to print, download or email the page, or add it to your 'My Documents' page. These delivery icons can be used in conjunction with the tick boxes in the table of contents.
- 7 If you have reached the document page following a search, 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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