



# Quick tips for using **ProView**

## **What is ProView™**

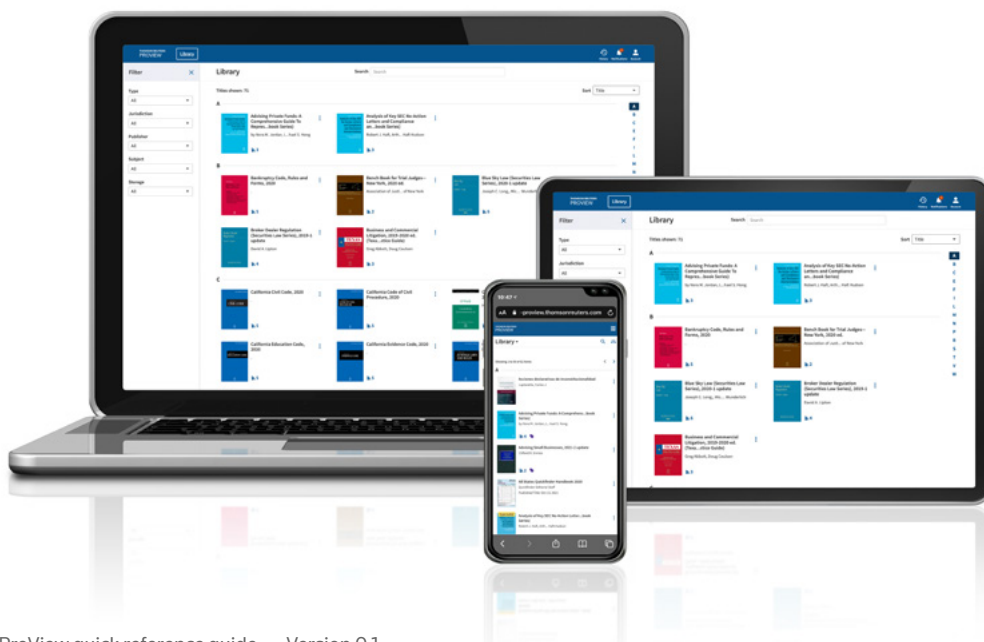
ProView is a browser-based eBook platform providing access to your most trusted legal, tax and accounting titles whether you're at the office, with your clients, at home, or on the go.

With ProView's responsive browser-based platform there's no need to install software. You can access your library of content, both online and offline, enjoying a consistent experience on a wider array of devices.



# Check out these 5 quick tips to help get you started.

- 1 Getting started
- 2 Navigating your library
- 3 Making new annotations, notes, and bookmarks
- 4 Collaborating with peers and colleagues
- 5 Making the most of your offline titles



## Quick tip # 1

# Getting started using OnePass

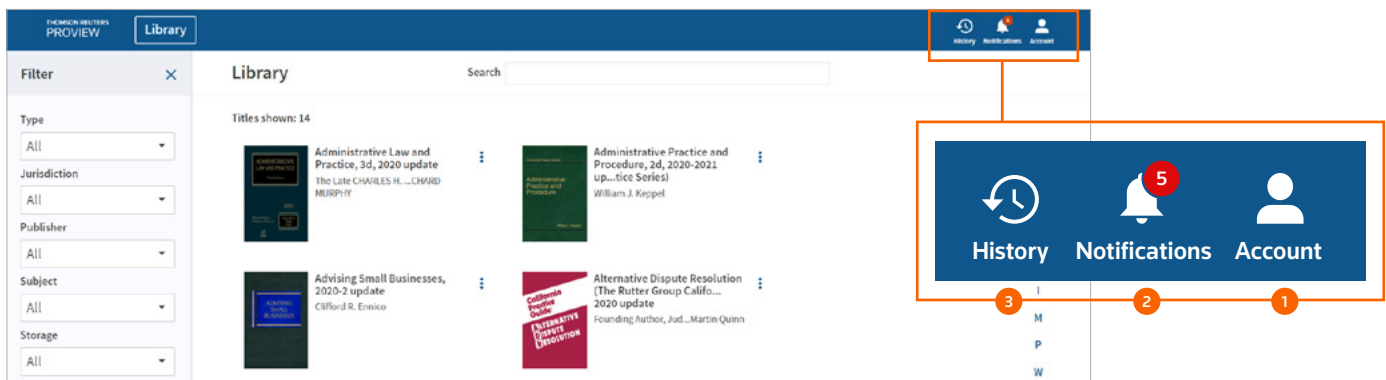
Get started by using your OnePass username and password at <https://next-proview.thomsonreuters.com>

If you're new to ProView, you must first create a OnePass profile (if you don't already have one) and add your ProView registration key before you can begin using your ProView titles.

The ProView login screen includes a link to create or update a OnePass profile.

## Quick tip # 2

# Navigating your library



- 1 Account** – Select languages, access our contact information and privacy policy, refresh your library, export a list of titles, clear ProView cookies, create offline password and sign out.
- 2 Notifications** – This feature alerts you each time a title is updated in your library, or a new title is added to your library account. Titles can be accessed directly from within the notification panel by clicking on the cover image.
- 3 History** – Titles you have read recently are shown in the history drop-down menu so you can return to them quickly. Recent history section allows you to pick up right where you left off by storing search terms, annotations and recently read titles.

## Quick tip # 2

### Your ProView titles

Each title in your library is represented by a title card, including a cover image, publication title and author details.

The screenshot shows a library interface with a search bar and a list of titles. The '2020 Federal Tax eBook' card is highlighted with a callout box. The callout box contains the following information:

- 1 Title card.
- 2 Cover image.
- 3 Publication title.
- 4 Author details.

## Quick tip # 3

### Making annotations, notes, and bookmarks

#### Creating annotations

You can create three types of annotations in your titles – bookmarks, highlights and notes.

**Viewing annotations** – Click the note icon on the left in the title header to open the annotation panel. From here you can select to view annotations by type or label colour, and filter by terms.

**Bookmarks** – To add a bookmark, click on the icon in the upper right corner and select the desired colour. You can delete a bookmark from the annotations panel on the left, by clicking the overflow menu in the upper right corner of the label, and clicking on 'Delete bookmark'.

## Quick tip # 3

**Notes & Highlights** – After selecting text, a pop-up window appears. Select the desired colour to 'add note' or 'highlight'. A note icon will appear in the margin.

**Label annotations** – To change your annotation labels, within a title select the preferences icon in the upper right corner. Select 'Rename colour label', enter your desired label name, and select 'Apply'.

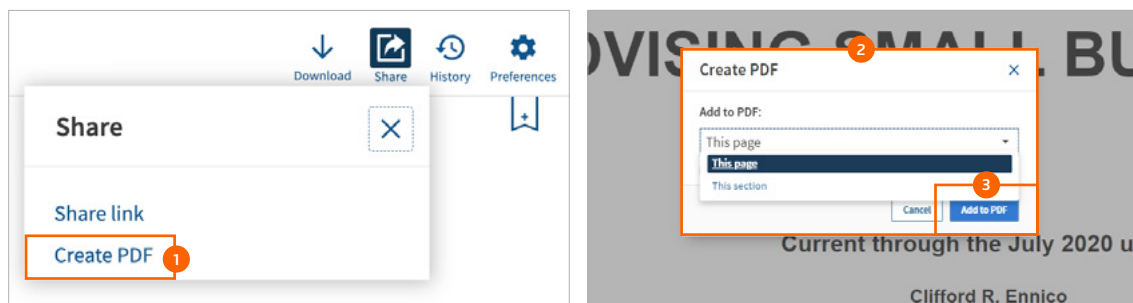
## Quick tip # 4

# Collaborating with peers and colleagues

This share feature allows you to easily share content by creating a link to share with another ProView user or by generating a PDF to print or email.

**Share a link** – Choosing 'share link' from the title card overflow menu, opens a dialogue box with a link to the title, which you can copy and paste into an email, chat, or document, to share with a colleague. Note that recipients of the link will only be able to access the content if they have a ProView subscription to that same title.

**Create a PDF** – Choosing 'Create PDF' opens a dialogue box to add the current section to a PDF.



1 'Create PDF' button.

2 PDF dialog box.

3 'Add to PDF' button.

After selecting 'Add to PDF', you can generate the PDF immediately by choosing 'Download' or 'Close' to download later. You must be online to use the feature. You can add up to five sections to a single PDF. You will be alerted if you attempt to leave the title before generating your PDF and will have the option to download the PDF and leave the title, cancel your action to leave the title, or cancel your sections saved to a PDF and leave the title.

## Quick tip # 5

# Making titles available for offline access

Titles can be downloaded for offline use from the main library page, or from within a title. Find the title card on the main library page and click on the vertical ellipses in the upper right corner, and select 'Download title'. If you haven't already created a password for offline use, you will be prompted to create one now.

**Note:** This does not mean downloading a PDF of the eBook, but downloading the title's content to your device to be accessed through the ProView platform while you are offline.

### Whilst you are offline:

- Downloads are linked to your device and browser, so you must use that same device and browser to access your eBooks offline.
- Clearing your browser cache will remove your downloaded content.
- To access your annotations – or to create new ones while offline – you will need to create an offline password from the account menu.

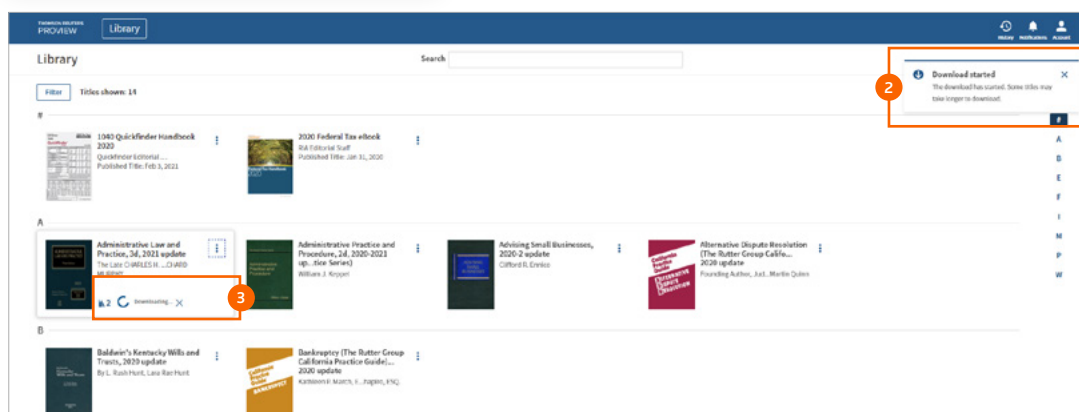
### Option 1:

## To download a title from the library

Download a title by clicking on the title action menu in the upper right corner of the title card and choosing "Download title":



1 Select 'Download title'.



2 An alert will appear in the upper right corner indicating that the download has started.

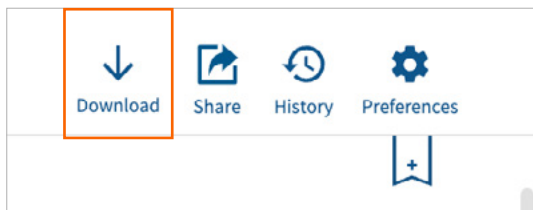
3 The title card also displays a spinner to indicate a download is in process.

## Quick tip # 5

### Option 2:

## Downloading from within the title

When reading a title, you can download that title by clicking the down arrow in the title header:

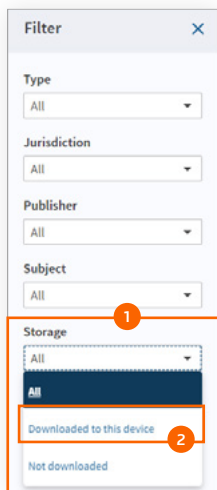


### To find your downloads for offline use:

While offline, navigate to the ProView URL using the browser you downloaded the content to.



Locate your available titles by selecting "Downloaded to this device" in the Storage filter dropdown, which is accessed from the filter panel on the left side of the screen:



- 1 Storage filter
- 2 Storage filter dropdown showing 'Downloaded to this device'.

