ProView user guide

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https://www.thomsonreuters.com/en/products/proview.html

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About this user guide

Within this user guide you will find everything you need to successfully start using ProView.

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

Useful tips on navigating through this user guide

Navigating between main sections:

To navigate between the main sections of this guide, use the navigation bar at the top of every page.

Getting started | Using your library | Managing your ProView titles | Using your eBooks | Annotating your eBooks | Using ProView offline

Sequential Pages:

Use the arrow keys next to the page number in the bottom right hand corner to go to the next, or previous page.

Returning to the TOC:

To return to the full table of contents, click the 'burger' icon in the bottom left of each page.

1 Exploring features:

Clicking a numbered square on a screen overview will take you directly to the specific feature. Equally, the numbered square next to the features title, will return you to the screen overview.

see 4.6.2 Subsections and reference links:

Where you see a bolded orange section number, you can click it to jump straight to that section.

Section One:

Getting started

1.1 How to access ProView
1.2 Logging in with OnePass

Section One:

Getting started

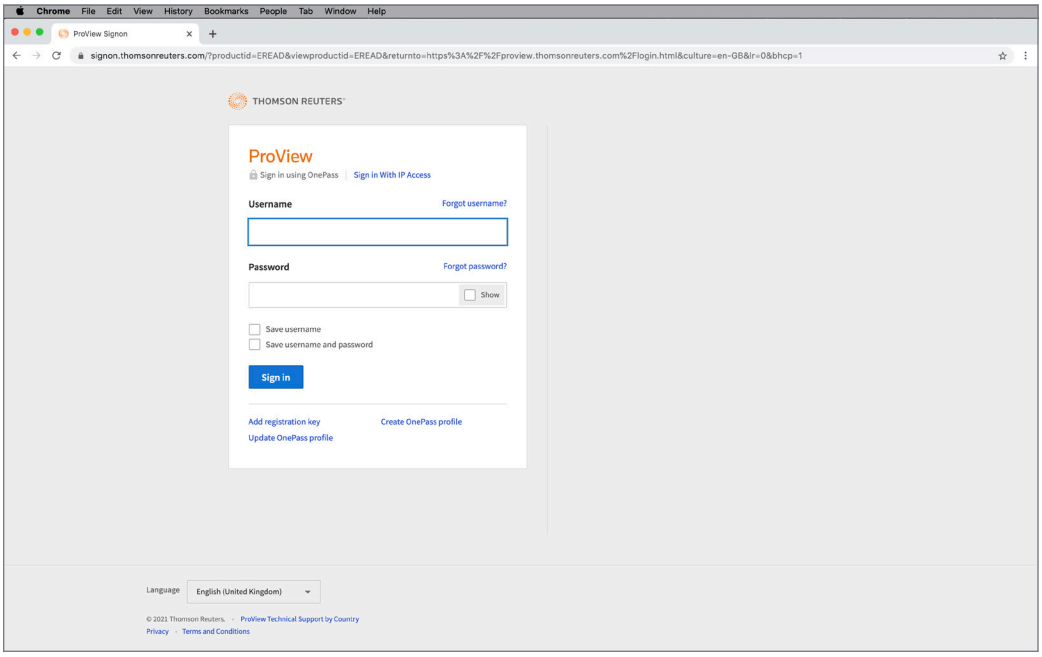
This section covers how to access the ProView application from your browser and logging into ProView with your OnePass user credentials.

1.1 How to access ProView

To begin using ProView, open your browser and navigate to the product login page at **next-proview.thomsonreuters.com**

For the optimal performance, we recommend using the latest version of Chrome, Microsoft Edge, Firefox, or Safari browser.

For accessing ProView when you are working offline without an internet connection, please refer to **section 6**.



Getting Started

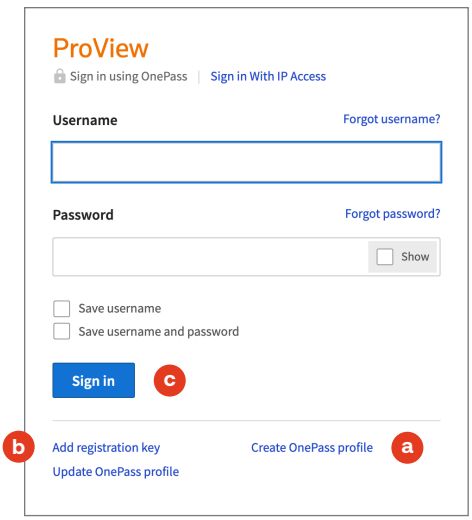
1.2 Logging in with OnePass

If you are a new ProView user, you must first add your ProView registration key* to your OnePass profile. If you don't yet have a OnePass profile, select 'Create OnePass profile' (a) on the login screen.

If you already have a OnePass profile, select 'Add registration key' to add your ProView registration key to your profile (b).

At the login screen, enter the username and password you created when you setup your OnePass profile and select the 'Sign in' button (c).

*Your ProView registration key is emailed to you when you purchase a ProView eBook. If you have questions about your ProView registration key, please contact Customer Service or your account representative.



Section Two:

Using your library

2.1 **Account menu**

2.2 **Notifications**

2.3 **History/recently read titles**

2.4 **Library search bar**

2.5 **Filter panel**

2.6 **Page display and navigation**

- 2.6.1 Sort options
- 2.6.2 A to Z navigation
- 2.6.3 Library home page navigation

2.7 **Archive**

- 2.7.1 Automatic archive
- 2.7.2 Manual archive/unarchive

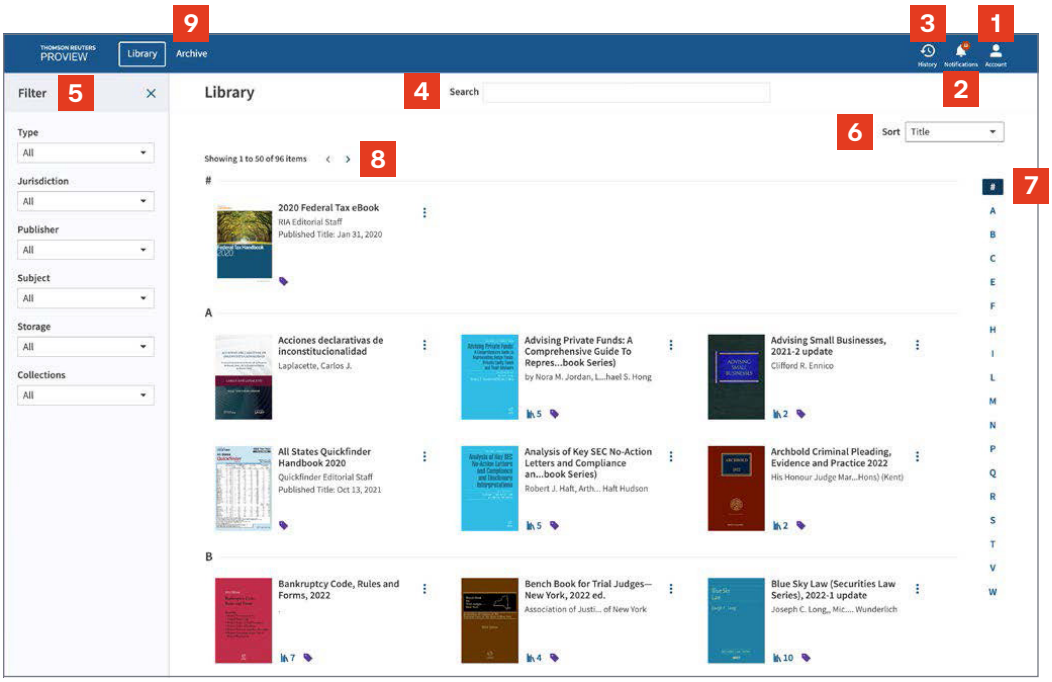
Section Two:

Using your library

You'll find everything you need to know about your eBook collection and your account at the Library home page. This section details each of the features available from the Library home page.

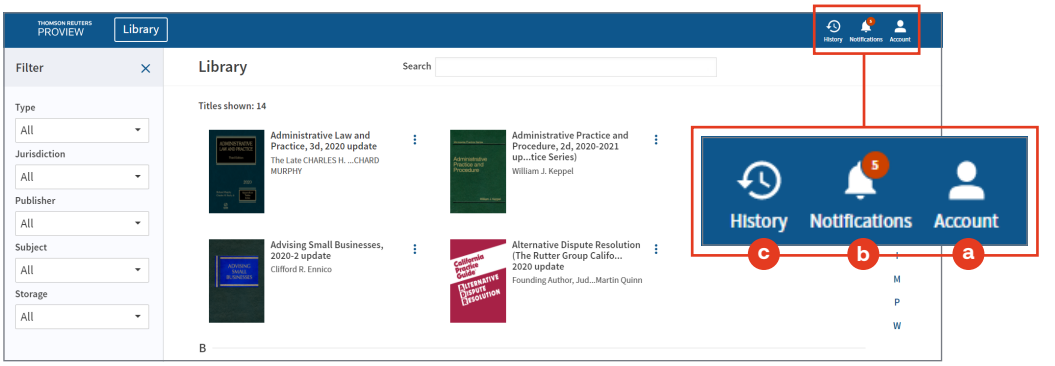
Useful Tip

In this section, click the numbered square next to each sub-section heading to return to this diagram, which shows you where to find each feature.



1. **Account menu** – see section 2.1
2. **Notifications** – see section 2.2
3. **History/recently read titles** – see section 2.3
4. **Library search bar** – see section 2.4
5. **Filters** – see section 2.5
6. **Sort order** – see section 2.6.1
7. **A to Z navigation** – see section 2.6.2
8. **Library home page navigation** – see section 2.6.3
9. **Archive** – see section 2.7

Using your Library



2.1 Account menu 1

Actions related to your full library and important account information can be accessed here. From the Account menu (a), select languages, access our contact information and privacy policy, refresh your library, export a list of your titles to Excel, clear ProView downloads and settings, and sign out.

2.2 Notifications 2

This feature alerts you each time a title is updated in your library or a new title is added to your library account. Access the notification panel by clicking on the bell icon (b). Titles can be accessed directly from within the notification panel by clicking on the cover image.

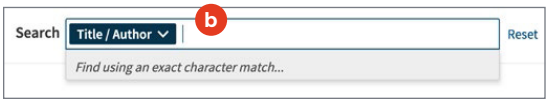
2.3 History/recently read titles 3

The last ten titles you have read are shown in the history dropdown menu (c) so you can return to them quickly. Accessing a title from the history panel will take you to the last place you visited within that title.

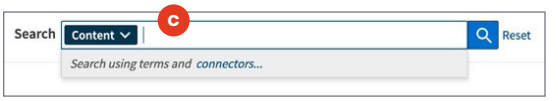
Using your Library

2.4 Library search bar 4

Use the search bar a at the top center of the Library home page to quickly find relevant content or a specific title.



If you know which title you need, select 'Title/Author' filter b to find your resource by title or author name. The Title/Author filter is performing an exact match of the characters entered and will immediately begin to filter your library to display the titles containing those characters in the title or author fields of the publications in your library.

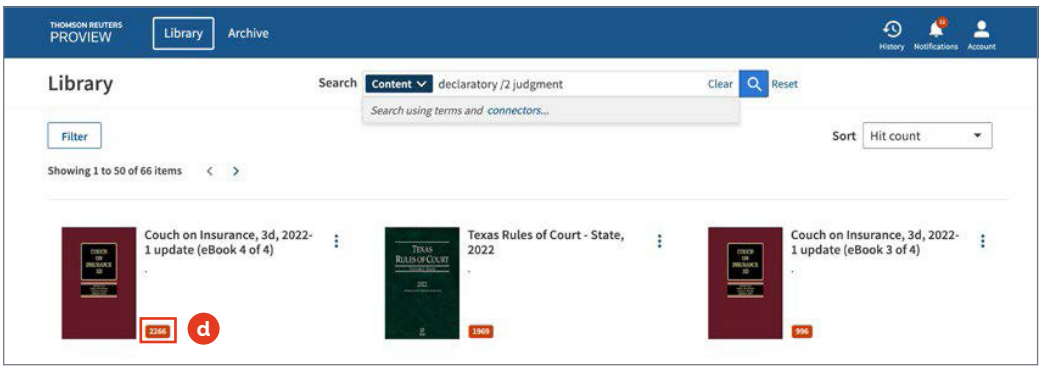


If you aren't certain which titles may contain relevant information for your research, select 'Content' c to run a full-text search across all publications in your library. Use key words, phrases or terms and connectors to search your library.

Useful Tip

Apply filters from the panel on the left, such as jurisdiction, subject matter or collections, before running your library content search to refine your search results.

Upon running your content search, the library will display all titles meeting your search criteria in order of relevance by hit count, which is displayed in a badge d to the right of the cover image.

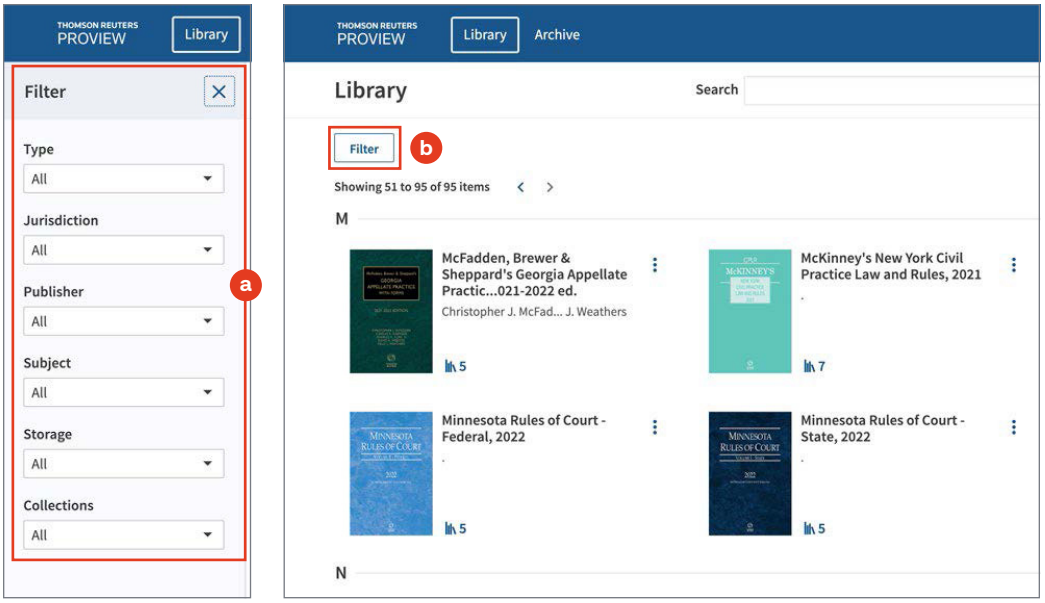


When you open a title from your library search results, it will open to the search results page. For search result navigation, see 4.6.2.

Using your Library

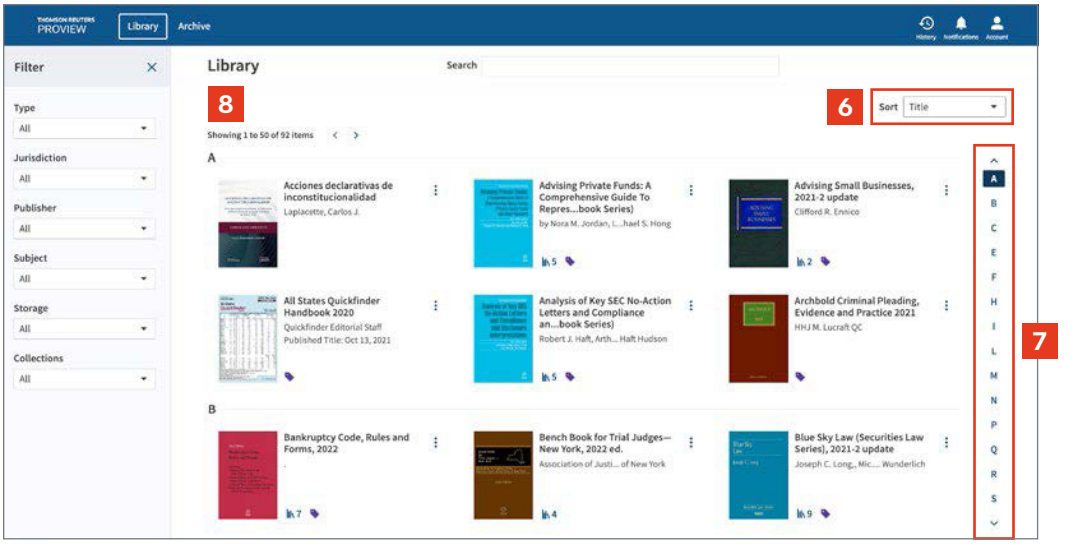
2.5 Filter panel 5

You can apply filters to your library (a) to help you quickly identify relevant content. The library filter panel defaults to open when you enter the library. Once closed, you can access the filter panel by selecting the 'Filter' button (b) on the top-left of the screen. Library filter options include type of publication, jurisdiction, publisher, subject, storage, and collections (see 3.2.6).



Using your Library

2.6 Page display and navigation



2.6.1 Sort options 6

Use the sort options to display your library in the order that works best for you. Sort by title, type, jurisdiction, publisher, subject and ownership. The title name is the default sort order for the library.

2.6.2 A to Z navigation 7

Use the A to Z navigation on the right to quickly jump to different sections of your library. The A to Z navigation headings correspond to your chosen sort option (see 2.6.1).

2.6.3 Library home page navigation 8

For large libraries, ProView displays fifty titles at a time. Select the arrows at the top of the screen to advance through the pages of your library.

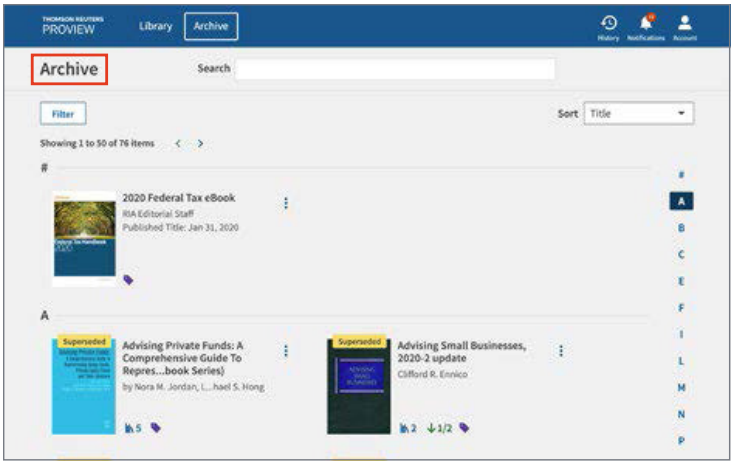
Using your Library

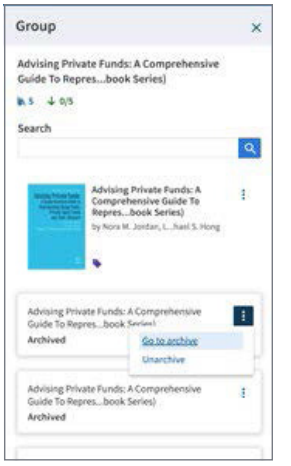
2.7 Archive 9

To help you manage your eBook library, ProView has an archive feature to move old editions out of your main library. To access your archived titles, simply select the 'Archive' button at the top your library to open the Archive page.

2.7.1 Automatic archive

Where available, eBooks that have been replaced by a newer version are identified as superseded by a gold banner displayed on the cover image. These older versions are automatically moved to a separate 'Archive' tab.





For titles that are part of title grouping (see 3.2.2), archived titles will have a collapsed card display when you open the group from the Library home page.

2.7.2 Manual archive/unarchive

You can choose to manually archive or unarchive titles in your library. To archive a title in your main library, select 'Archive' from the title actions menu (see 3.2) of the title you wish to archive.

To unarchive a title, which will move the title back to the Library home page, open the Archive page. Go to the title card of the title you wish to unarchive and select 'Unarchive' from the title actions menu. If the title is part of a title grouping, you can also unarchive the title from the group panel on the Library home page.

Section Three:

Managing your ProView titles

3.1 Title card

3.2 Title actions menu

3.2.1 View publisher details

3.2.2 Open group

3.2.3 Download title/remove download

3.2.4 Import annotations

3.2.5 Share link

3.2.6 Add to/edit collection

3.2.7 Archive/unarchive

Section Three:

Managing your ProView titles

This section details how eBooks are displayed on the Library home page and how to access a number of time-saving features related to your titles.

3.1 Title card

Each of your eBook titles is represented by a virtual card on your Library home page. From the title card, you can view additional details about your title and perform a number of actions.

The title card includes a cover image (a), title and author (b), and actions menu (c) for accessing additional features related to your title.

The following icons (d) may appear on the title card:

- 2 indicates that the title is part of a group of related titles (see 3.2.2),
- 1/2 indicates that the title has been downloaded for offline use (see 3.2.3),
- indicates that the title has been added to a collection (see 3.2.6).

Managing your ProView titles

3.2 Title actions menu

Access additional information and features for your title by selecting the title actions menu in the upper right corner of the title card.

Useful Tip

In this section, click the numbered square next to each sub-section heading to return to this diagram, which shows you where to find each feature.

1 **View publisher details** – see section 3.2.1

2 **Open group** – see section 3.2.2

3 **Download title** – see section 3.2.3

4 **Import annotation** – see section 3.2.4

5 **Share link** – see section 3.2.5

6 **Add to collection** – see section 3.2.6

7 **Archive** – see section 3.2.7

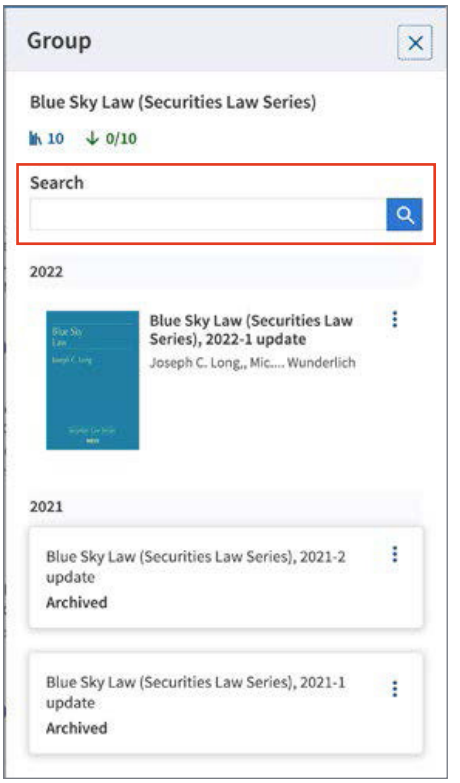
3.2.1 View publisher details 1

To learn more about a title, select 'View publisher details' from the title actions menu. A pop-up box will appear with additional publishing information.

Managing your ProView titles

3.2.2 Open group 2

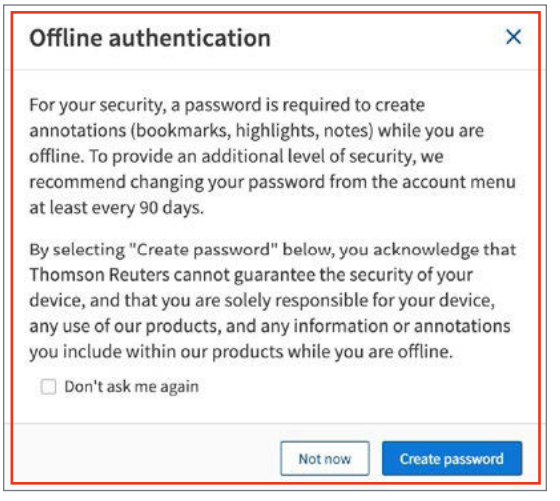
If your publication is part of a series, you can access other titles included within a group by selecting 'Open group' from the title actions menu. From the group panel, you can also run a search across the titles in that group.



3.2.3 Download title/remove download 3

Titles can be downloaded for offline use from the Library by selecting 'Download title' from the title actions menu.

When you initiate a title download, you will be prompted to create an offline access password. For details regarding creating an offline access password, please see 6.1.



Managing your ProView titles

Once the download has completed, the title card will display a green down arrow icon.

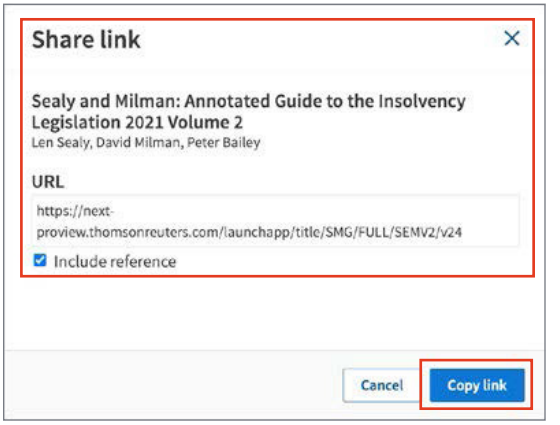
Factors such as device speed, network strength and title size can impact the time it takes for a title to download. For longer downloads, a notification appears every 2 minutes to remind you that the download is still in progress. An additional notification will display if you attempt to logout while the download is in progress.

3.2.4 Import annotations 4

For details on how to import annotations, please see 5.3.

3.2.5 Share link 5

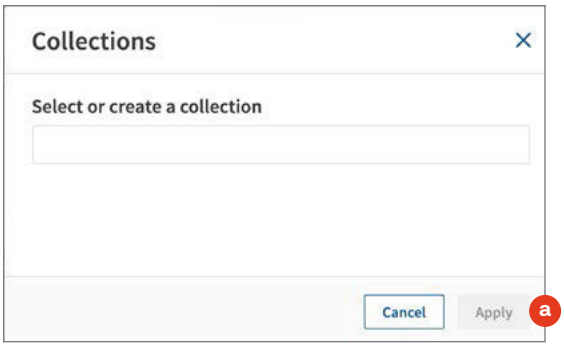
You can copy and paste a title link into an email or document to share with a colleague by choosing 'Share link' from the title card actions menu, which opens a dialogue box with a link to the title. Recipients of the link must be ProView users and have access to the same title.



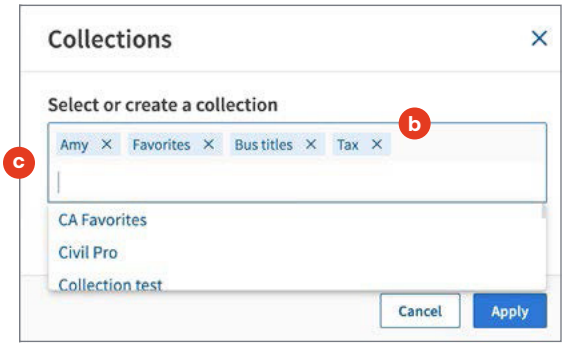
Managing your ProView titles

3.2.6 Add to/edit collection 6

Quickly filter your library to relevant titles by creating your own customized collections by selecting 'Add to collection' in the title actions menu. From the Collections dialogue box, create a new collection or select from your existing collections and then selecting 'Apply' a . Once you have assigned a title to a collection, a purple tag icon will display on the title card.



You can edit collections from the title actions menu under 'Edit collections.' From the Collections dialogue box, click the 'x' next to the existing collection name to remove the title from that collection b , or click into the text box to enter the name of a new collection or choose from the dropdown of your existing collections c .



3.2.7 Archive/unarchive 7

For details on 'Archive', please see 2.7.

Section Four:

Using your eBooks

4.1 Setting user preferences

4.2 Accessing history

4.2.1 Recently read titles

4.2.2 This title

4.3 Share feature

4.3.1 Share link

4.3.2 Create PDF

4.4 Downloading titles for offline use

4.5 Using table of contents

4.6 Searching your title

4.6.1 Accessing and using search

4.6.2 Navigating search results

4.7 Returning to the library

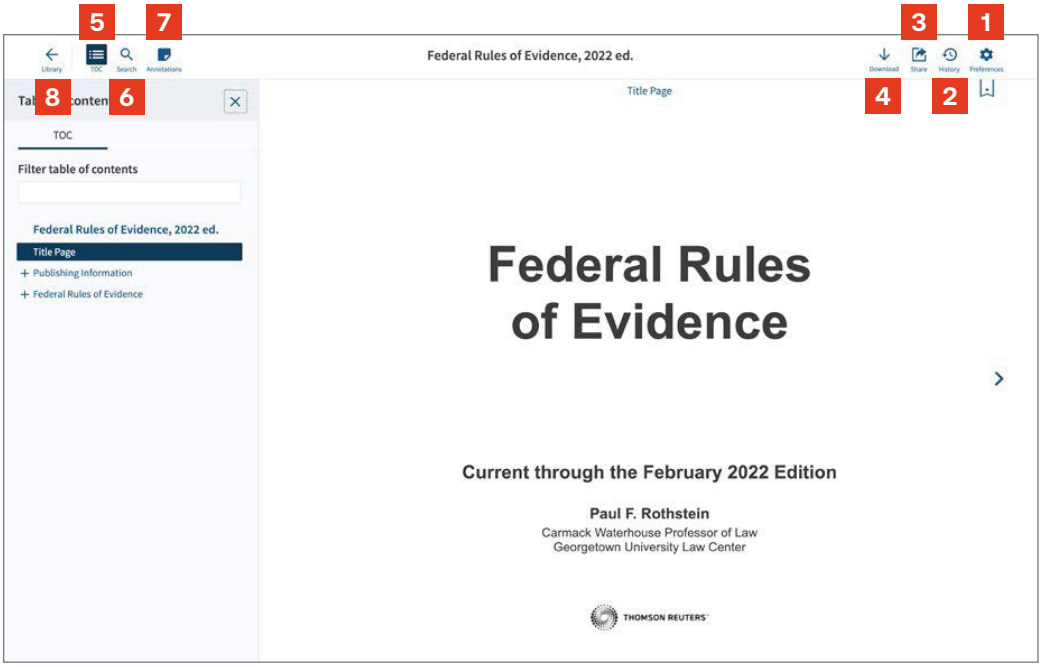
Section Four:

Using your eBooks

This section details how to access the features related to using your eBooks. To begin using an eBook, click on the title card on the Library home page to open the title.

Useful Tip

In this section, click the numbered square next to each sub-section heading to return to this diagram, which shows you where to find each feature.

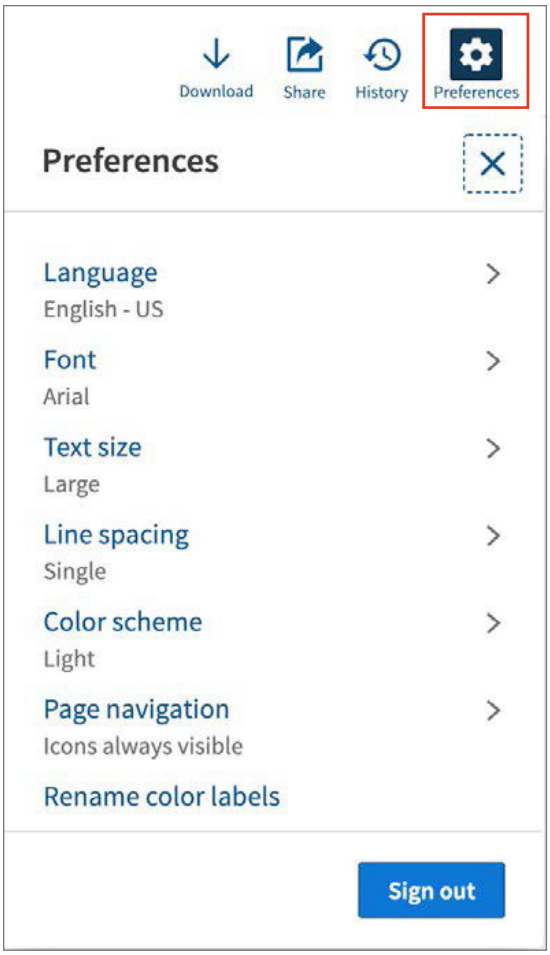


1. **Setting Preferences** – see section 4.1
2. **Accessing History** – see section 4.2
3. **Sharing content** – see section 4.3
4. **Downloading for offline use** – see section 4.4
5. **Using the table of contents** – see section 4.5
6. **Searching your title** – see section 4.6
7. **Annotations** – see section 5
8. **Returning to library** – see section 4.7

Using your eBooks

4.1 Setting user preferences 1

Customize your reading experience by selecting the gear icon in the upper right. Language, font, text size, line spacing, color scheme, and page navigation are all customizable. Within user preferences, you can also assign project names to each color label to allow you to easily organize your bookmarks, notes, and highlights.



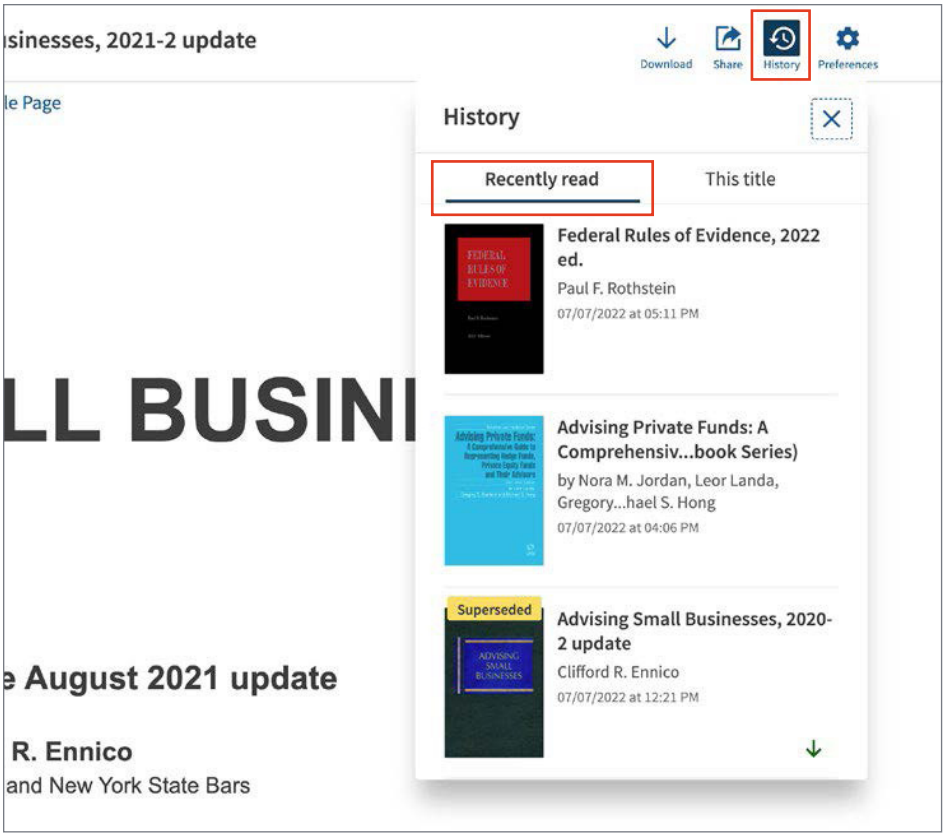
Using your eBooks

4.2 Accessing history 2

From the clock icon, easily access your recently read titles as well as the search and annotation history for the title you are currently viewing.

4.2.1 Recently read titles

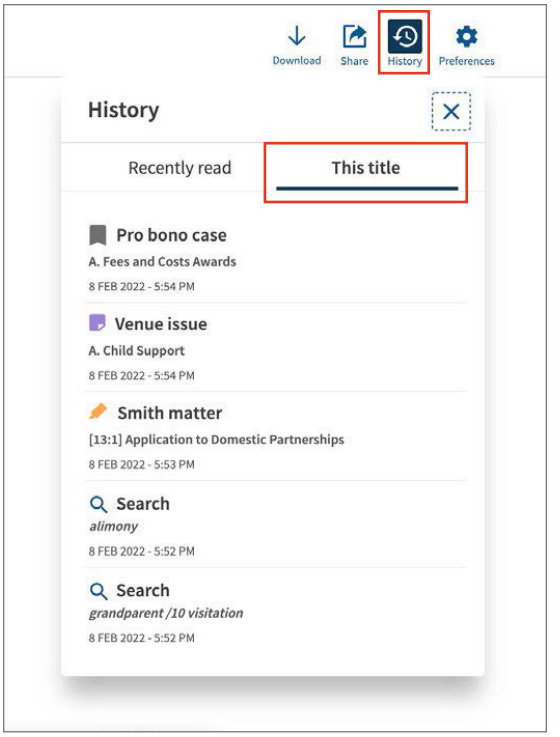
While you are viewing a title, you can quickly jump to another title from the 'History' feature. Opening a title from the 'Recently read' tab will take you to the location you were viewing last.



Using your eBooks

4.2.2 This title

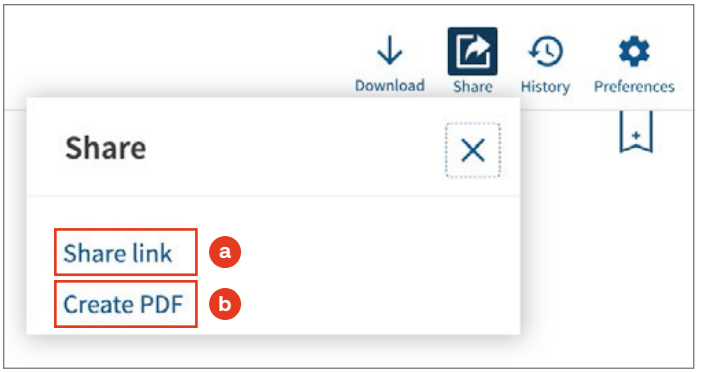
Use the 'This title' tab to jump to past searches and annotations within the title you are currently viewing.



Using your eBooks

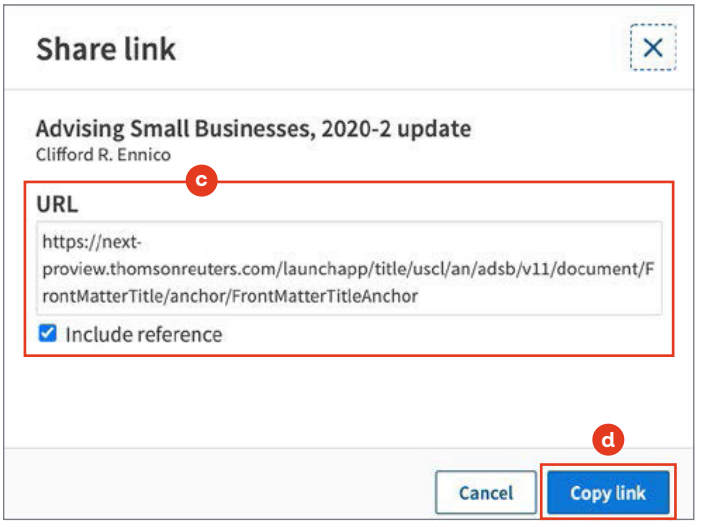
4.3 Share feature 3

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



4.3.1 Share link

The share link feature creates a clickable link to a specific location within a title. From the 'Share' icon, select 'Share link' (c) then select 'Copy link' (d) to share the link via email, text message, or with other applications on your device. The link recipient simply selects the link to open the title to the referenced section. Recipients of the link must be ProView users and have access to the same title.



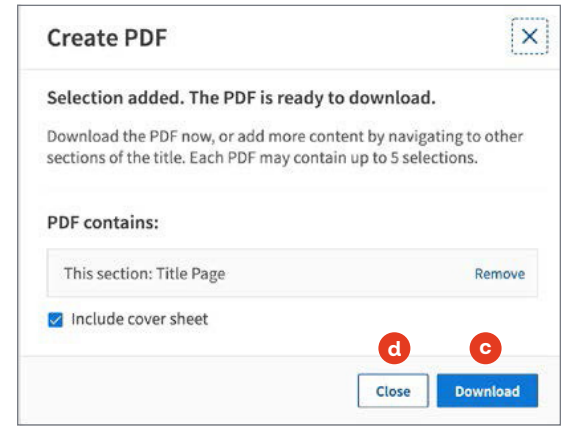
Using your eBooks

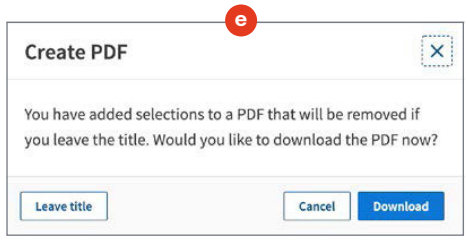
4.3.2 Create PDF

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

Before selecting 'Add to PDF' (a), check the 'Include annotations' box (b) if you want to include your annotations in the PDF. Generate the PDF immediately by selecting 'Download' (c), or wait to add more content by selecting 'Close' (d) and navigating to another section of the title. Each PDF may contain up to 5 selections. You must be online to use the 'Create PDF' feature.

An alert (e) displays if you attempt to leave the title before generating the PDF.





4.4 Downloading titles for offline use 4

Download a title while it is being viewed by selecting the down arrow icon in the top-right corner of the screen.

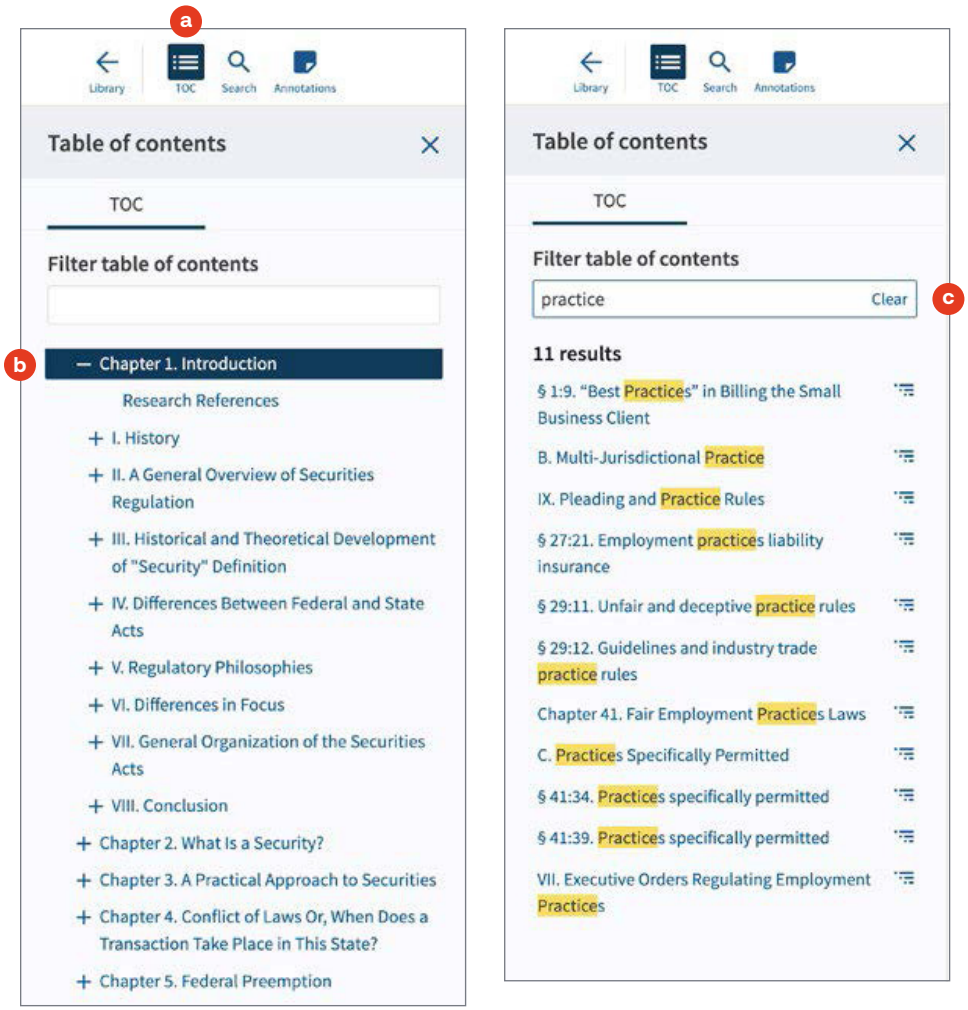
For details on downloading a title, please see 3.2.3.

Using your eBooks

4.5 Using table of contents 5

When you open a title, the 'Table of Contents' panel on the left defaults to being open. To expand the reading view, close the panel by clicking on the 'x' in upper right corner of the panel. Click the 'TOC' icon (a) on the left side of the header to re-open the panel. To navigate within the table of contents, click the '+/-' (b) to the left of the heading name to expand or collapse the hierarchy.

Use the filter box (c) at the top of the table of contents to quickly find relevant content by identifying key terms in the section headings.



Using your eBooks

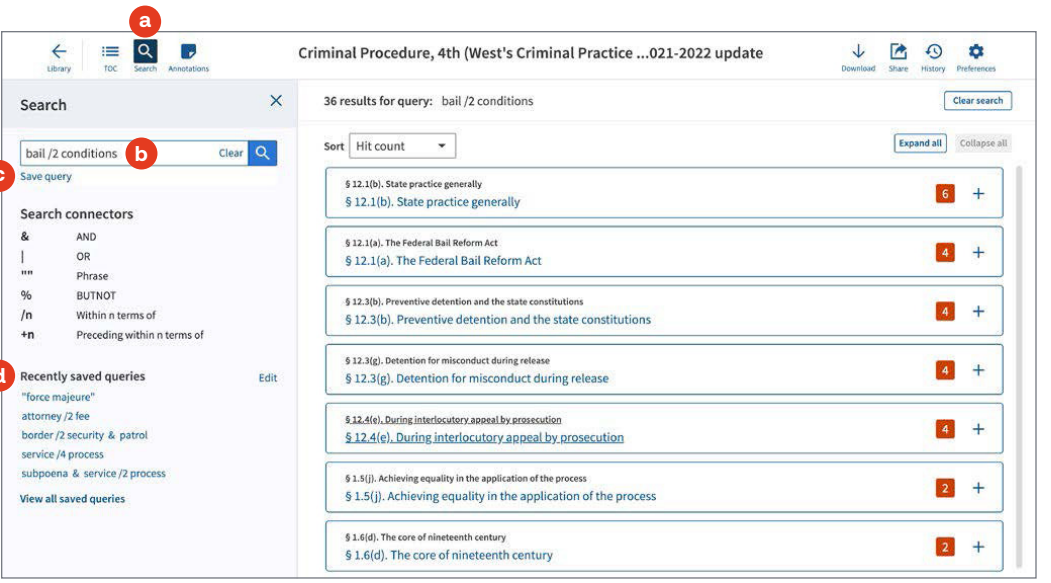
4.6 Searching your title 6

ProView eBooks are searchable, making it easy to quickly find relevant information within the title. The following sections provide details on using the Search feature.

4.6.1 Accessing and using search

To run a search in your title, select the magnifying glass icon a in the header to open the search panel. Enter your query in the search box b . ProView supports keywords, phrases, and terms-and-connector searching.

To save time and typing, save frequently used search queries by clicking 'Save query' c under the search box after running your query. Your list of saved queries d appears at the bottom of the search panel.



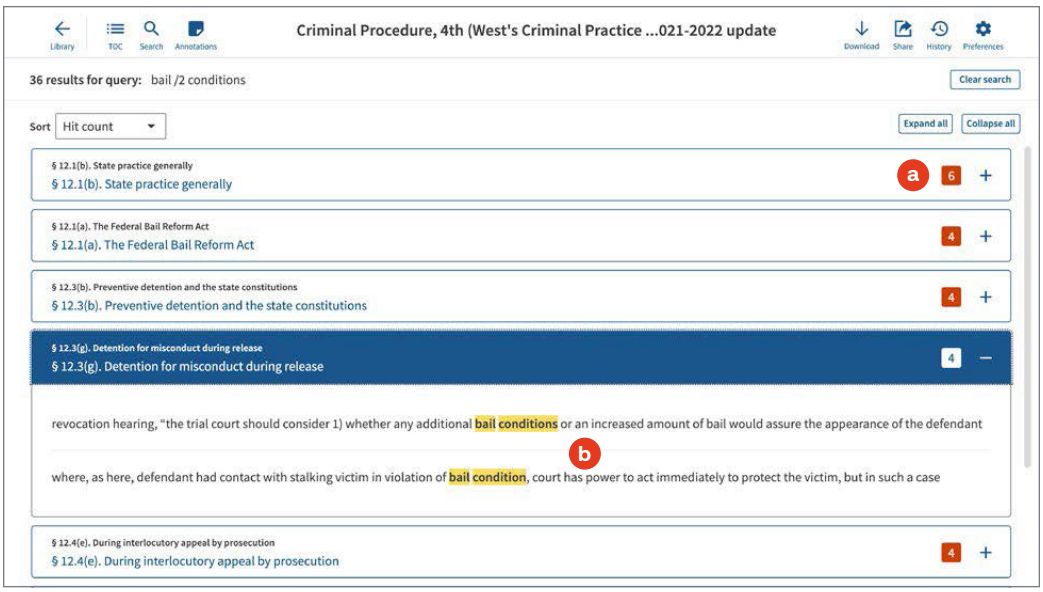
Useful Tip

Offline search has different capabilities from online search, so there will be differences in the search results when searching offline versus online. Keyword and terms-and-connector searching is available offline, but proximity and phrase searching is not. **See section 6.**

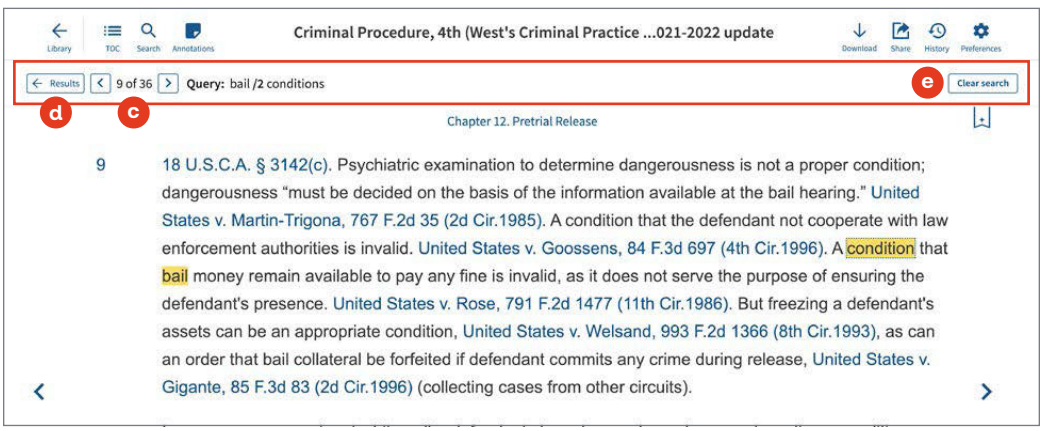
Using your eBooks

4.6.2 Navigating search results

After running a title search, the search results appear in the right-hand pane in hit count order. The hit count is displayed in a badge to the right (a).

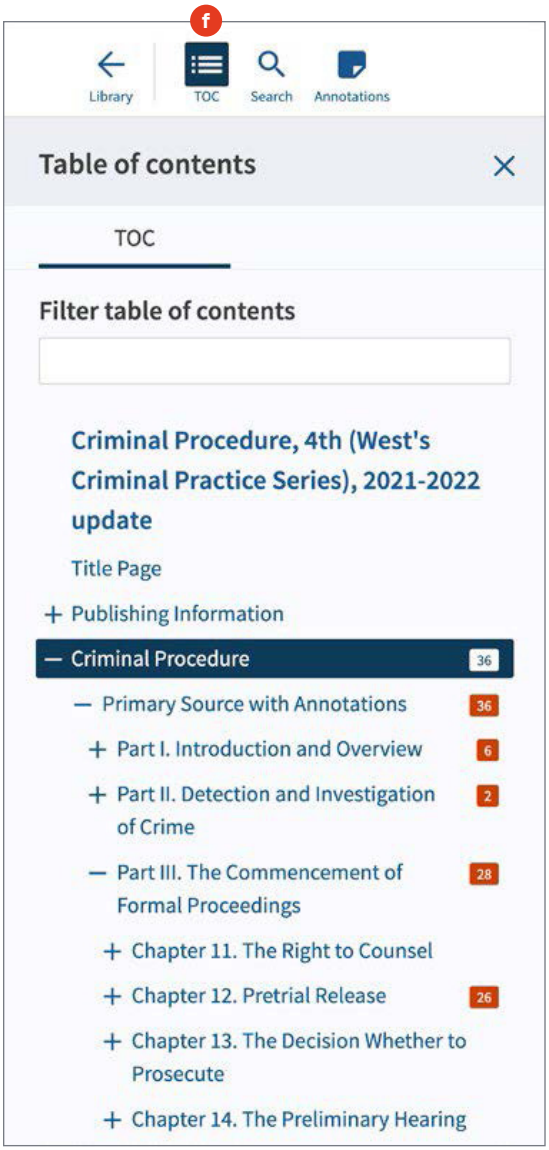


View snippets to see your results in context by selecting the '+' to the right of the hit count badge or by selecting the 'Expand all' button at the top-right of the result list. To begin reviewing the search results, click into the snippet text (b). From the navigation heading, use the arrows (c) to navigate through highlighted search terms; return to the result list (d); or clear the search (e).



Using your eBooks

Select the 'TOC' icon f to see the placement of your search results in the table of contents, allowing you to quickly identify relevant hits.



4.7 Returning to the library 8

Select the 'Library' arrow icon to return to the Library home page.

Section Five:

Annotating your eBooks

5.1 **Creating annotations**
- 5.1.1 Bookmarks
- 5.1.2 Notes and highlights

5.2 **Accessing and managing annotations**

5.3 **Importing annotations**

Section Five:

Annotating your eBooks

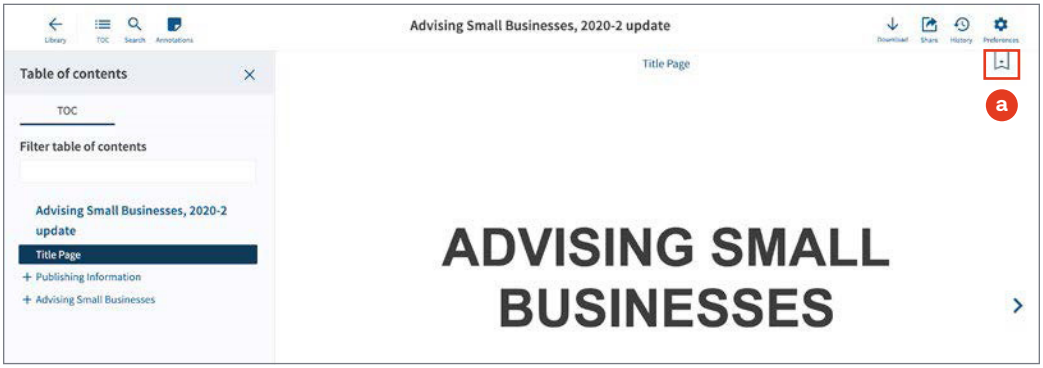
Customize your eBooks by adding bookmarks, highlights and notes. This section covers how to use the annotation feature.

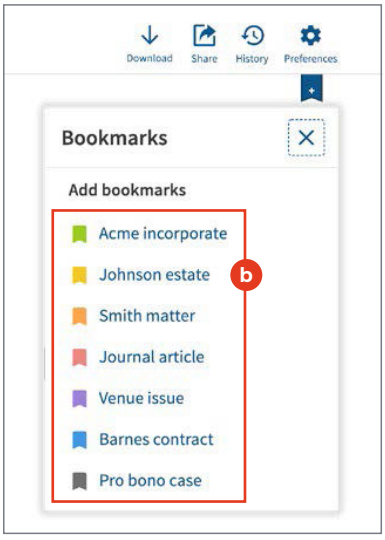
5.1 Creating annotations

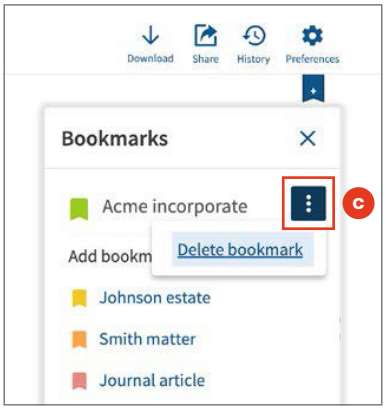
You can create three types of annotations in your titles – bookmarks, highlights and notes.

5.1.1 Bookmarks

To add a bookmark, select the bookmark icon (a) in the upper right corner of the reading pane and choose the desired color from the dropdown menu (b) . To delete a bookmark, click on the bookmark icon, select the overflow menu (c) to the right of the menu and choose 'Delete bookmark.'



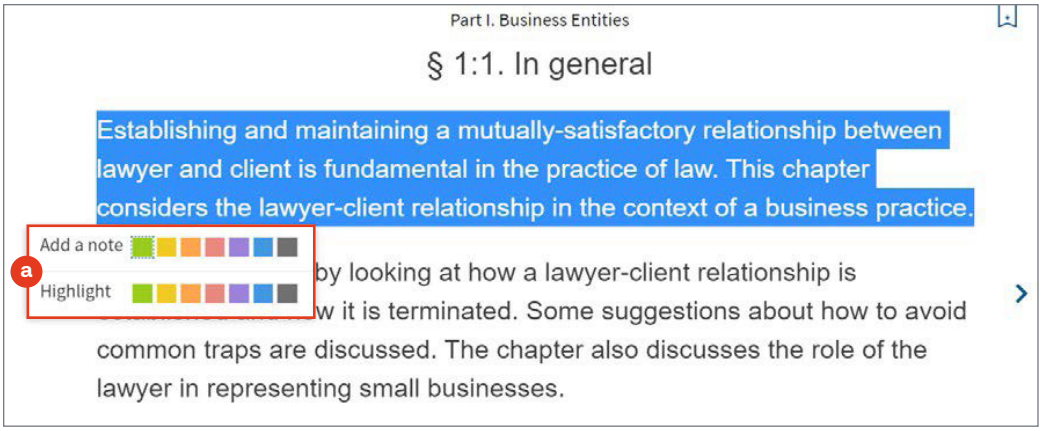




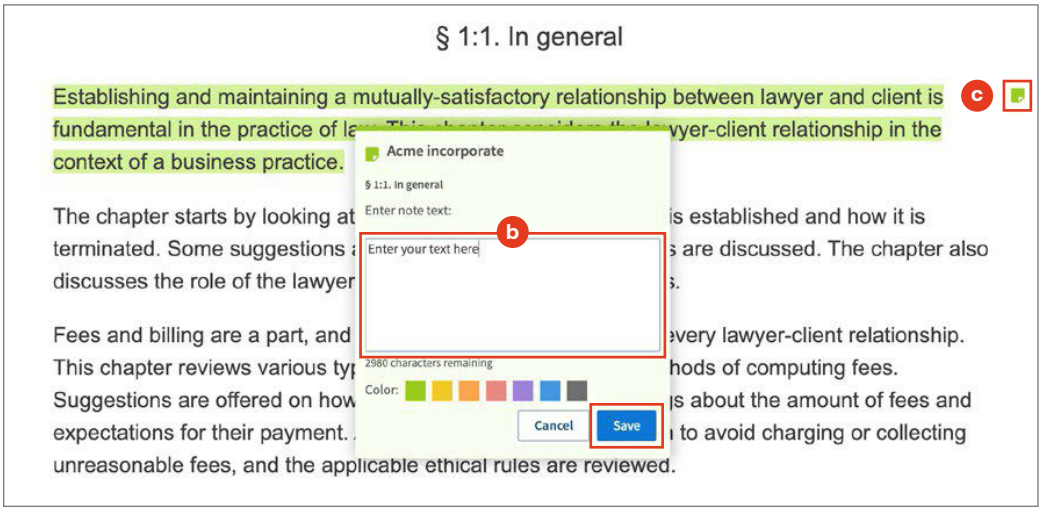
Annotating your eBooks

5.1.2 Notes and highlights

After selecting text, a pop-up box a appears. To add a note, select the desired color to the right of 'Add a note.' To add a highlight, select the desired color to the right of 'Highlight.'



When creating a note, a pop-up box b will appear. Add your text and select 'Save.' A note icon c will appear in the margin of the page.

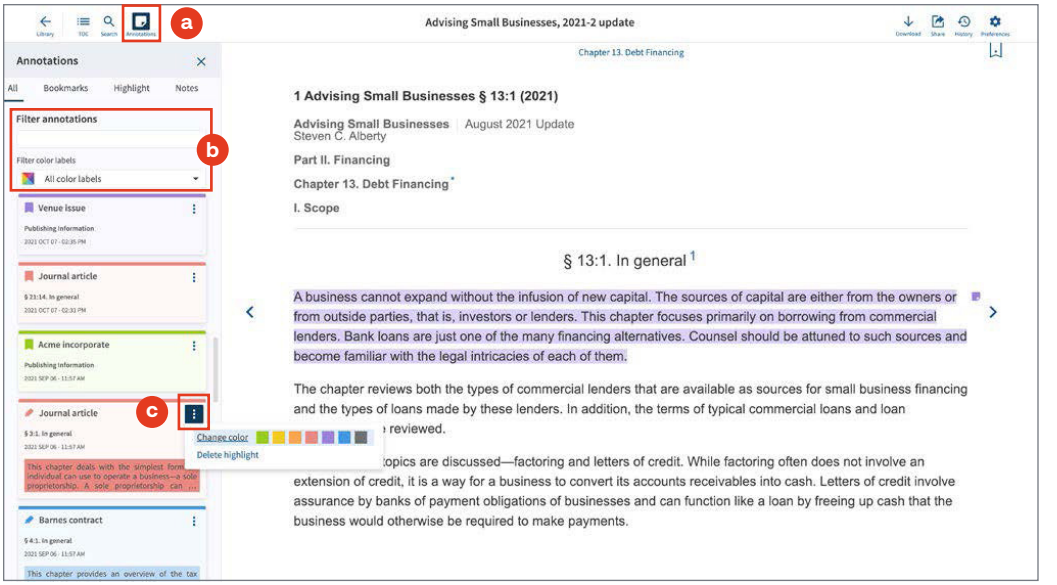


Annotating your eBooks

5.2 Accessing and managing annotations

Select the note icon (a) in the title header bar to open the annotations panel. From here, navigate to your annotations or filter them by type, text or label color (b).

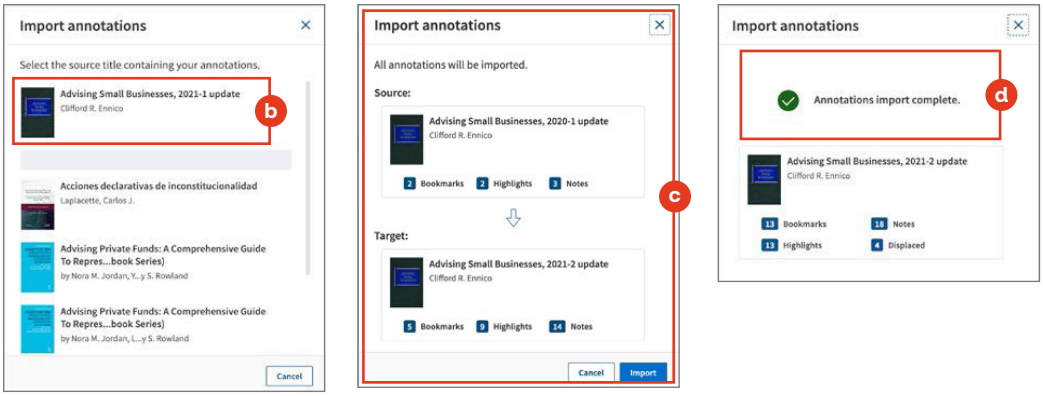
To edit or delete an annotation, click on the actions menu (c). You can also edit an annotation by clicking on the bookmark or note icon in the page margin.



Annotating your eBooks

5.3 Importing annotations

When a new edition arrives in your library, save time by importing your annotations from the earlier edition. From the title actions menu of the title card (see 3.2) of your new title, select 'Import annotations' a and follow the prompts. The title containing the annotations you want to import is your Source title; the title to which you are importing the annotations is your Target title. After selecting the Source title b , a summary of annotations to be imported is displayed c . Select 'Import' to copy the annotations to the Target title. A confirmation box appears upon completion d .



Section Six:

Using ProView offline

6.1 **Accessing ProView without an internet connection**

6.2 **Using your library offline**

6.3 **Finding your downloaded titles**

6.4 **Using your eBooks offline**

6.4.1 Creating/changing an offline authentication password

6.4.2 Navigating eBooks offline

Section Six:

Using ProView offline

ProView supports you while working offline so you can continue to refer to your titles and your notes when you do not have an internet connection, for example if you are traveling or are in court without Wi-Fi. This section covers accessing and using ProView when you are offline.

6.1 Accessing ProView without an internet connection

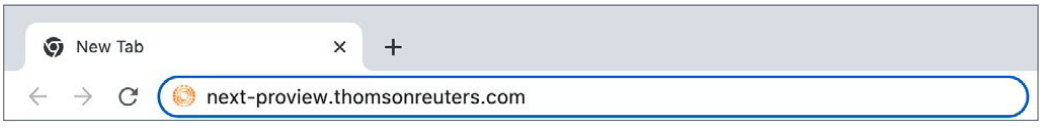
To access eBooks offline, download the eBooks to your device when you have an internet connection. For details on downloading an eBook, see 3.2.3.

To access your downloaded titles offline, you must use the same device and browser you used to download your titles. Downloaded titles are saved to your browser cache; clearing your browser cache will remove your downloaded content from your device.

Useful Tip

If you are planning to use ProView offline, it is good practice to make sure the needed titles are downloaded to the device you will be using. If a previously downloaded title is republished to make a change or correction, the outdated version of the title will be automatically removed from your device. An alert message will notify you when this has occurred and remind you to download the updated version for offline use.

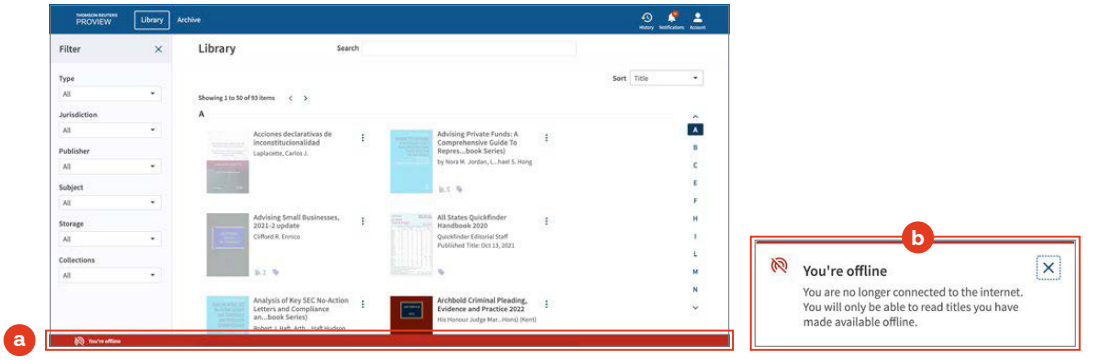
To use ProView without an active internet connection, open your browser and enter the ProView URL, next-proview.thomsonreuters.com, in the browser address bar.

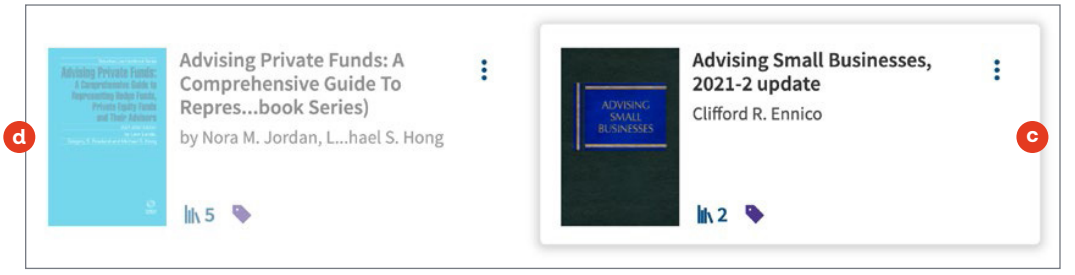


Using ProView offline

6.2 Using your library offline

ProView notifies you when you are offline by displaying a red footer (a) at the bottom of the screen as well as a pop-up message in the upper right corner (b). In offline mode, the title cards of downloaded eBooks will be fully visible (c), but the title cards and thumbnail images of eBooks that have not been downloaded will be grayed out (d).



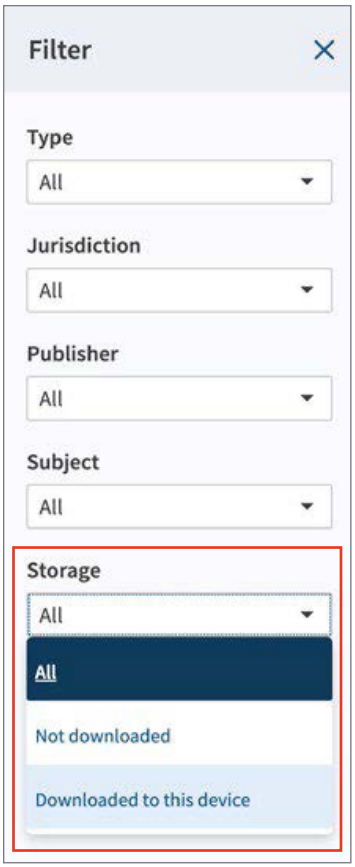


When using ProView offline, some library features are not available. Menu options that are not available offline are grayed out. In offline mode, the 'Title/Author' filter is available, but the 'Content search' option is not.

Using ProView offline

6.3 Finding your downloaded titles

For large libraries, the quickest way to locate available titles is by going to the 'Storage' filter and selecting 'Downloaded to this device' in the filter panel on the left side of the screen.



6.4 Using your eBooks offline

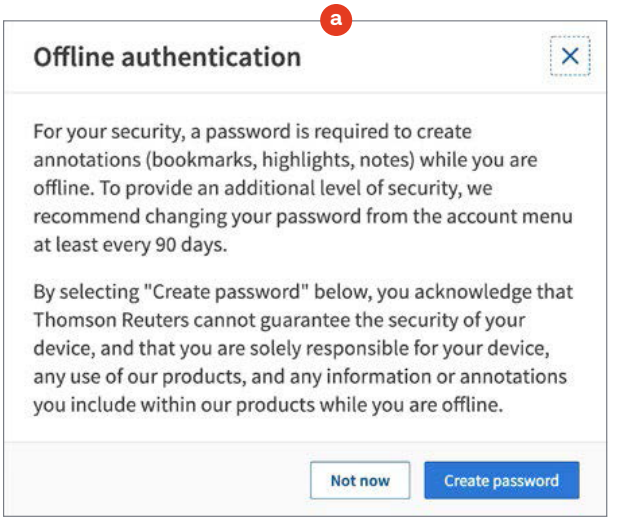
Once you've located your desired title, click on the title card to open the eBook. In offline mode, some features will appear grayed out to indicate that they are unavailable without an internet connection.

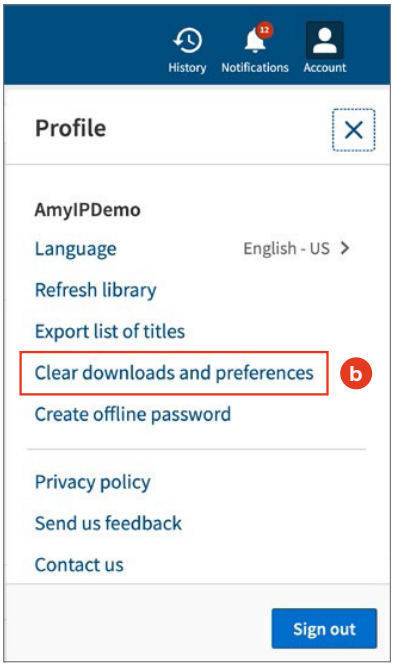
Using ProView offline

6.4.1 Creating/changing an offline authentication password

To protect your data while working offline, access to annotations requires creation of an offline authentication password. Note that this password is different from your OnePass username and password. The offline authentication password is specific to the device and browser on which it was created.

When initiating a title download (see 3.2.3), you will be prompted to create an offline authentication password a . This allows you to view and create annotations when you are offline. If you choose not to create a password, you are still able to view your titles offline, but the annotations feature will be disabled. If you choose 'Not now,' the prompt will continue to appear each time you download a title. If you check 'Don't ask me again,' you will no longer see the prompt, but you can create (or change) an offline authentication password at any time from the 'Account' Menu on the Library home page b .





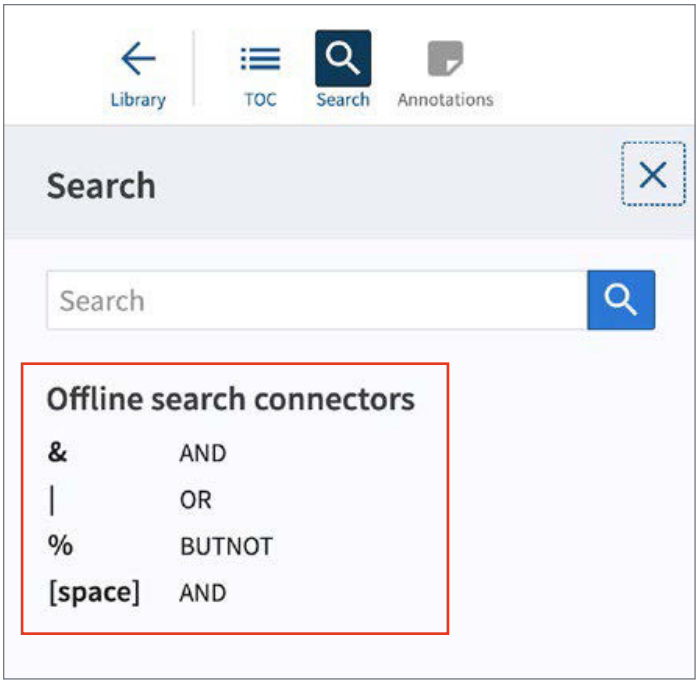
Using ProView offline

6.4.2 Navigating eBooks offline

Several features make it easy to continue your research offline. Use the Table of Contents panel to navigate (see 4.5), or use the Annotations panel to jump to sections containing notes, highlights, or bookmarks (see 5.2). Remember that offline access to annotations requires an offline authentication password (see 6.1).

You can also search the full contents of your eBook in offline mode. Key word and terms-and-connector searches are supported in offline mode, but phrase searching and proximity searching are not.

For your convenience, a list of the supported search connectors is provided in the search panel.



Notes

To order or for more information, contact your sales representative at legal.thomsonreuters.com/en/support/contact-us.

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