

Useful tips for effective research

Search, save and share documents from all of your titles, while staying on top of the latest developments.

Help Desk

Monday-Friday,
 9:00 a.m.-5:00 p.m. ET
 1866 256 6842
 (in Toronto: 416 943 3100)
 support@knotia.ca

Search

Enter your term in the **Search** box at the top left and click .

Focus your search by checking the box in front of one or more table of contents entries.

Search Assistance

Click the  and click on Advanced Search to frame your search without having to use Boolean logic or other search syntax (the **Search** box will display your search string).

Refine Search

 Access **search templates** and **topical indexes**.

Refine Results

Click on a table of contents entry to filter your search results list to that section.

 **Edit search** without having to start from scratch.

 **Edit search preferences** to view results in “relevance” order or to change the number of “words around first hit.”

Search within results in the box at the far right of the toolbar.

Review Results

Click on a document link from your search results list – your search terms will be highlighted in **bold red** (you can turn this off by clicking the  icon).

Click either the *Document* or the *Hit* arrow  at the top right to advance through your results.

Search All

Click on *Search All* at the top right of your screen to search multiple titles at the same time.

Customize my search list to create a default list of titles to search against.

Fetch

Access a specific document quickly using its document ID.

For example:

- CITE Lipson
- IT 102R2
- ITR Schedule II Class 2
- Form T5001
- ITA 15.2(1)
- Treaty Denmark

Click the question mark  to find Fetch prefix examples.

Search Syntax

Click the  beside the Search box for examples of standard Boolean logic and other search operators.

Operator or scope	Examples	Searches for
AND	damages AND windfall damages windfall damages + windfall	Documents containing both <i>damages</i> and <i>windfall</i>
OR	CCA OR “capital cost allowance”	Documents containing either <i>CCA</i> or <i>capital cost allowance</i>
NOT	termination NOT employment termination A employment	Documents containing <i>termination</i> but not <i>employment</i>
Phrase (actual syntax: quotation marks)	“permanent establishment”	Documents containing the phrase <i>permanent establishment</i>
Multiple character wild card	deduct*	Documents containing words beginning with the letters <i>d,e,d,u,c,t</i> and any variations, such as <i>deducts</i> , <i>deducted</i> , <i>deduction</i> , <i>deductibility</i>
Stemming	apply~	Documents containing variations of the word <i>apply</i> , such as <i>applies</i> , <i>applying</i> , <i>application</i>
Unordered proximity (actual syntax: w/)	reimbursement w/5 taxable	Documents in which <i>reimbursement</i> occurs within five words of <i>taxable</i> (in any order)
Ordered proximity (actual syntax: pre/)	reimbursement pre/5 taxable	Documents in which <i>reimbursement</i> precedes <i>taxable</i> within five words
Grouping (actual syntax: parentheses)	(CCA w/5 building) OR (“capital cost allowance” w/5 building)	Documents containing <i>CCA</i> or <i>capital cost allowance</i> within five words of <i>building</i>



Tag Paragraphs to Print or Save

Click the *Enable tagging*  icon from the toolbar.

Click the paragraphs you wish to print (from one or more documents)—a red sidebar will appear next to each tagged paragraph.

Click the *Save*  icon from the toolbar or the *Print* icon from the site options area at the top right of the screen, depending on the action you wish to perform.

My Notes and Highlighter

Highlight text and click the *add note* and/or *Highlight* icon  to add and save personal notes or highlight important text within online knowledge collections.

Any documents you add a note to or highlight are stored under *Briefcase*> *My Notes*>*View My Notes and Highlights*

My Pinboard

Click on the *Pin* icon  to pin individual or multiple documents and searches for quick retrieval. Remove individual pinned items or clear your Pinboard with one click.

Copy with Context

Select the text you wish to copy.

Click the *Copy selected text with context*  icon.

Open a Word document or email.

Select *Paste* (Ctrl+V) from the *Edit* dropdown menu.

The copied text—along with reference information on its position within the table of contents—will appear in your document or email.

Save to Hard Drive

Click the *Save text or document(s) to hard drive*  icon from the toolbar, and select one of the following options (depending on what you wish to save):

- Save this document
- Save checked boxes
- Save search results documents
- Save tagged paragraphs

The *Save* dialogue will appear. Click *Save* and follow the prompts.

Print

Click *Print* from the site options area at the top right of the screen, and select one of the following print options (depending on what you wish to print):

- Print this document
- Print selected text
- Print checked boxes (from the table of contents)
- Print tagged paragraphs

The *Print* dialogue will appear. Follow the prompts.

Briefcase

Any documents you save to your briefcase are stored in folders you create and name (under *Briefcase*>*Saved documents*>*All folders*).

Share documents: You can grant users read-only or full access to folders.

Search briefcase folders: Use the *Search* box on the left navigation pane to search for a term within one or more selected folders.

Any search you save is stored under the name you assign it (under *Briefcase*>*Saved searches*).

Rerun saved search: Click on a saved search link to rerun it against updated content.

Rename or delete search: You can also rename or delete saved searches.

Session Tracker

Click the *Session Tracker* at the top right of your screen to create a research trail of all research time, searches performed, and documents accessed during your session.

Share Documents with Non-Subscribers



Create a link to a document that you can paste into an email or instant message.



Email a document, along with your personalized message, to up to three email addresses. Check the *Send me a copy* box to cc yourself.

Email News

To **fine-tune your email settings**, click the *Email News* link under *Quick Links* on your home page, and change your settings.

To **access a 90-day archive of news**, select a news title (from your home page or *Subscriptions* tab) and click on the *View news archive* icon  from the toolbar.

Help

Access the training videos on our *Help* page and click on the *Training videos*.

5 Top Search Tips

- Use *Fetch* to retrieve specific documents quickly
- Use the Wildcard operator (*) to ensure you get every variation of the word you are searching for
- Use the **iBox**  icon (formerly *Annotations*) next to any legislative or treaty section to quickly access legislation, case law, administrative materials, commentary, and other interpretative documents relating to that section
- Save your search to your *Briefcase* and rerun it against updated content
- To open up another tab, click on *Alt+D* then *Alt+Enter*