

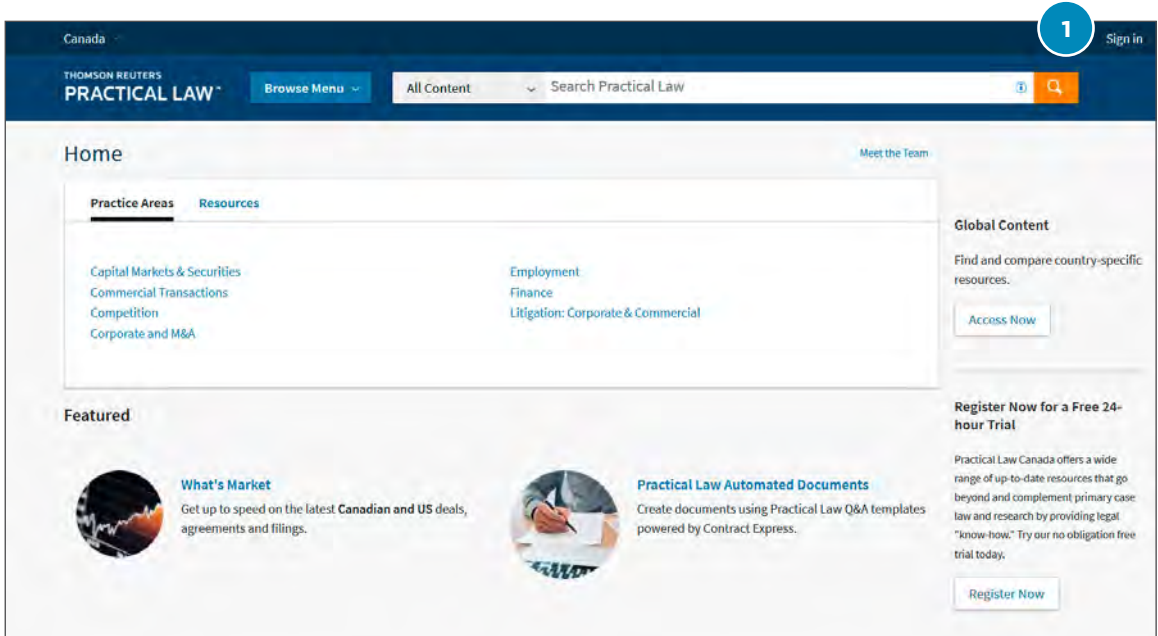


Practical Law[®] Canada

**ACADEMIC USER GUIDE:
GETTING STARTED**

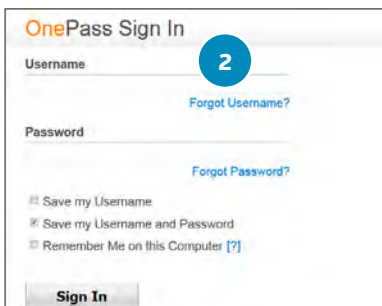
HOW TO LOG IN

To get started, visit ca.practicallaw.thomsonreuters.com

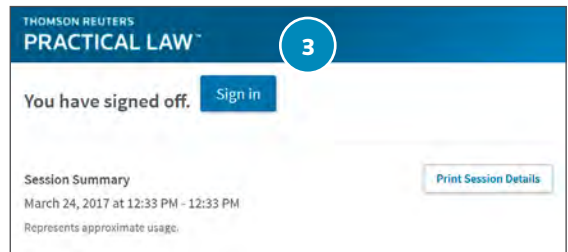


1. "Sign in" at the top right-hand corner of the site and enter your OnePass username and password.
2. The "save my username and password" box will save your log-in credentials when accessing Practical Law Canada on your browser. The "Remember Me on this Computer" box will allow you to remain logged in when accessing Practical Law Canada on your browser.

If you forget your log-in credentials, simply click the "Forgot Username?" or "Forgot Password?" links to receive instructions on how to reset your username and password.



3. When you log off, a session summary page is presented.



GET TO KNOW THE PRACTICAL LAW CANADA HOMEPAGE

The screenshot shows the Practical Law Canada homepage. At the top, there is a navigation bar with 'Canada' on the left, 'THOMSON REUTERS PRACTICAL LAW' logo, a 'Browse Menu' dropdown, and a search bar labeled 'Search Practical Law'. On the right of the navigation bar are links for 'Favourites', 'History', and a user profile icon. A dropdown menu for the user profile is open, showing 'History', 'Edit profile', 'Email preferences', and 'Sign out'. Below the navigation bar is the 'Home' section with 'Practice Areas' and 'Resources' tabs. The 'Practice Areas' tab is active, showing categories like 'Capital Markets & Securities', 'Commercial Transactions', 'Competition', 'Corporate and M&A', 'Employment', 'Finance', and 'Litigation: Corporate & Commercial'. To the right of the 'Home' section is a 'What Are You Working On?' section with a 'Learn More' button. Below this is a 'Global Content' section with an 'Access Now' button. The 'Recent History' section lists various documents and tasklines, such as 'Independent Contractor/Consultant Agreement', 'Professional Services Agreement', 'E-Commerce and Technology Taskline', 'Workplace Investigation Taskline', 'E-Discovery Taskline (Corporate Counsel)', 'Amalgamation Taskline', 'Derivative Action Taskline (DN)', and 'Equity Compensation: Stock Options of a Public Company Taskline'. The 'Featured' section includes 'What's Market', 'Practical Law Automated Documents', 'Learn More About Practical Law', and 'Welcome to the new Practical Law'. The 'Legal Updates' section lists 'Changes Coming to Federal and Ontario Workplace Laws' and 'Announcing DIP (Interim) Financing on Practical Law Canada Finance'. Numbered callouts 1-7 are placed over the page to highlight specific features: 1. Practice Areas/Resources tabs; 2. Search bar; 3. Favourites link; 4. User profile dropdown menu; 5. Recent History section; 6. Sign up for Email Updates button; 7. Legal Updates section.

1. Browse by practice area or resources.
2. Use the search bar to find the resources you need by utilizing keywords or phrases.
3. Access your Favourites page.
4. Update your personal settings, access your email preferences, and log out of Practical Law Canada with this dropdown menu.
5. Access your recent browsing and search history, as well as recently viewed resources.
6. Sign up for monthly email newsletters from the practice areas of your choice.
7. View the latest Legal Updates authored by the Practical Law Canada team.

TIP: Click the Practical Law logo to be taken back to the Practical Law Canada homepage at anytime.

BROWSE

BROWSING BY PRACTICE AREA

Practical Law Canada gives you the ability to browse all content within a given practice area. The practice areas we currently cover are listed below.

- Capital Markets & Securities
- Commercial Transactions
- Competition
- Corporate and M&A
- Employment
- Finance
- Litigation: Corporate & Commercial

Browsing by Resource Type

Practice Notes and Practice Note Overviews – straightforward how-to guidance and clear explanations of current law and practice ranging from basic overviews to detailed analyses for specialists.

Standard Documents and Clauses – up-to-date precedents (model documents and clauses) with embedded guidance in the form of detailed drafting notes, negotiating guidance, opposing positions, and alternative clauses. You can quickly email, download, and export them into Microsoft Word for easy editing and customization.

Checklists – checklists, timelines, and flowcharts serve as quick reference reminders and provide a 360-degree view to help you make sure that you have covered all the bases.

Toolkits – a compilation of resources that focus on specific issues.

Glossary Terms – quick definitions that enable users to decode jargon and dovetails with practice area documents.

Provincial Q and A's – high-level overviews of particular legal topics in a specific jurisdiction. The comparison tool enables users to compare requirements on a variety of key topics across multiple jurisdictions.

Legal Updates – trend pieces or snapshots on prudent issues written by our lawyer-editors and expert guest contributors.

What's Market – deal summaries database on Practical Law Canada designed to help users stay informed of current trends and market practice and includes Market Practice Analysis.

BROWSE

BROWSE ACROSS THE PRACTICAL LAW CANADA WEBSITE TO ACCESS RESOURCES AND DISCOVER NEW CONTENT



1. You can browse the list of practice areas and resource types on the site using the "Browse Menu" button or the tabs on the homepage.

BROWSE

BROWSE ALL CONTENT WITHIN A PRACTICE AREA

Canada

THOMSON REUTERS
PRACTICAL LAW™

Browse Menu

Corporate and M&A Search Corporate and M&A

☆ Corporate and M&A Meet the Team

Topics Resources

Practice Notes
Standard Documents
Standard Clauses
Checklists
Toolkits
Provincial Q&A
Glossary

Market Analysis
What's Market

Current Awareness
Legal Updates

Legal Updates

Bill C-86: Key Proposed Amendments to the CBCA, BIA, CCAA and WEPPA
October 31, 2018

OSC Corporate Finance Branch Annual Report for 2017-2018
October 12, 2018

TSX Amendments to the SPAC Rules
October 04, 2018

Seed Financing Options: Convertible Notes, Equity and Cryptocurrency Webinar: Register Now!
September 18, 2018

OBA Business Law Program: Register Now!
September 13, 2018

View All

What Are You Working On?
Tell us what you're working on and we'll send the resources to help.
Learn More

Recent History

Board Resolutions: Canadian Equity Incentive Plan
Maintained • Standard clauses

Treasury Direction to Transfer Agent: Exercise of Stock Options
Maintained • Standard documents

Management Information Circular
Maintained • Practice notes

Management Information Circular: Preparing Compensation Discussion and Analysis
Maintained • Practice notes

Filing Documents with the Toronto Stock Exchange
Maintained • Practice notes

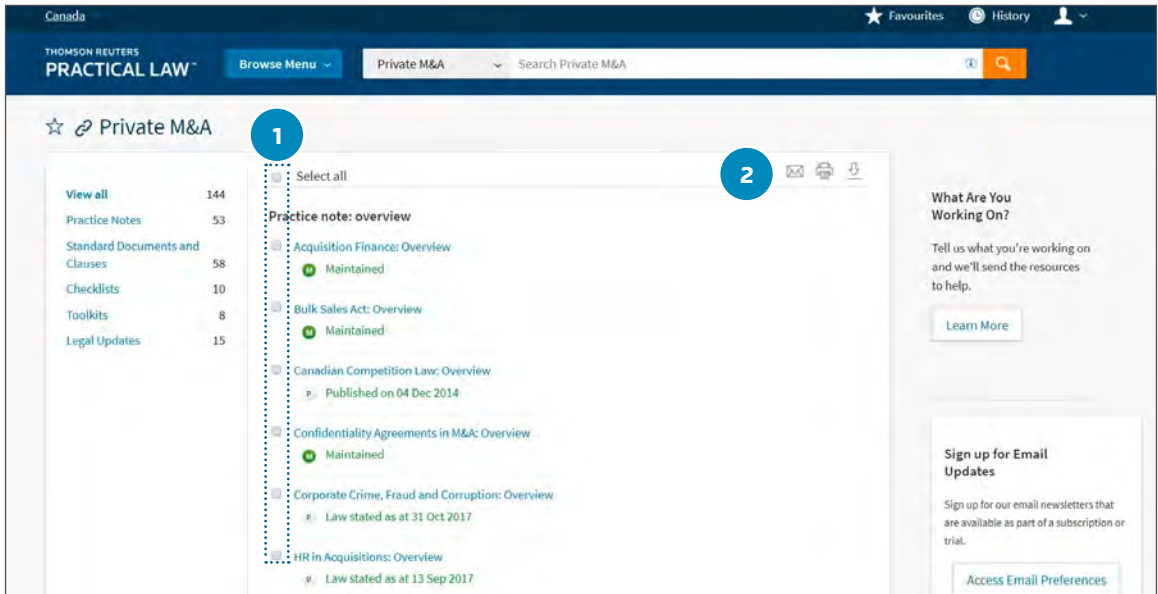
Taxation of Equity Compensation Awards: Overview
Law stated as at 17-Feb-2018 • Practice note: overview

Corporate Governance Standards: Overview

Click on "Resources" tab to see an overview of all the resource types available within the practice area.

BROWSE

TOPIC PAGE DISPLAYS ALL RELEVANT RESOURCES IN A LIST

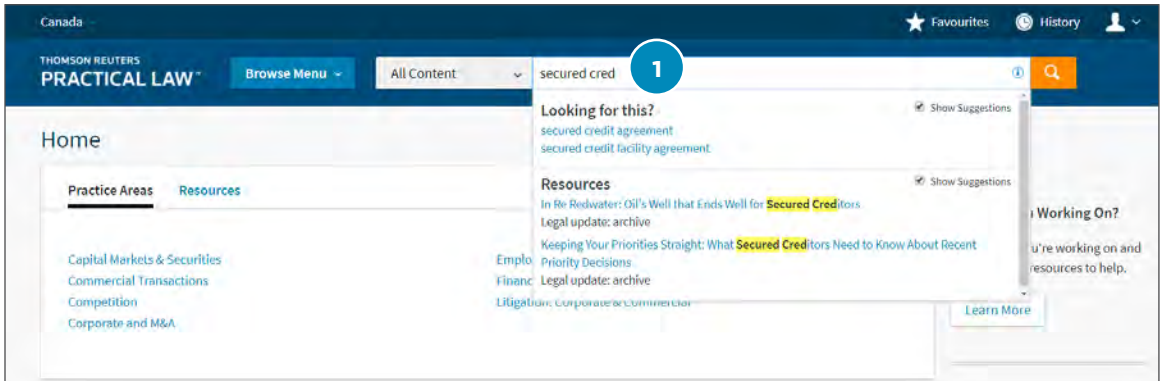


Print, download, or email directly from this list. To find out more about these icons, visit the “Document Display” section.

1. Use the checkbox to select the resource(s).
2. Select the print, download, or email icon.

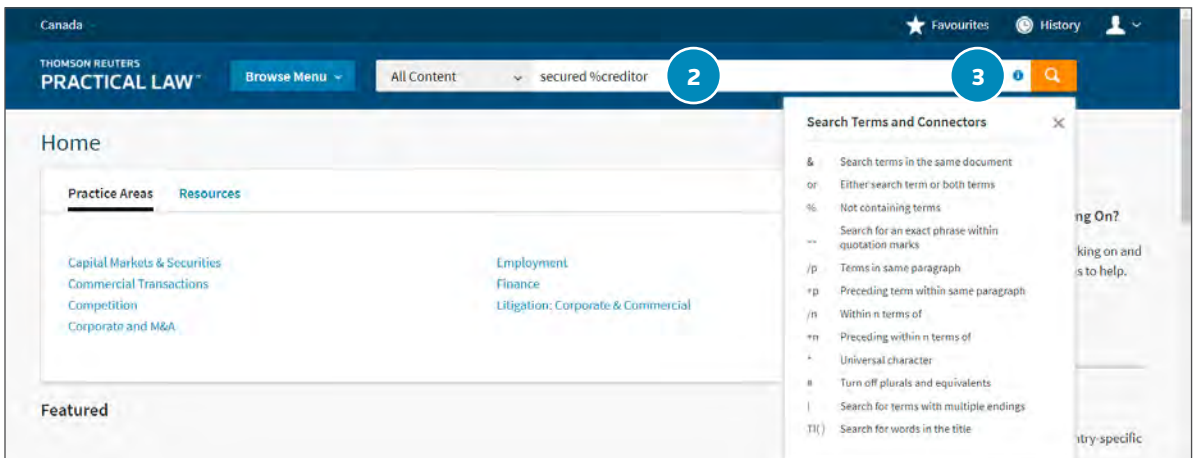
SEARCH


FIND THE RESOURCES YOU NEED QUICKLY AND EASILY USING OUR INTUITIVE SEARCH BAR



1. Enter a search term in the search bar. If you enter more than one search term, the search engine will automatically perform an “AND” search – meaning it will return a result that contains all the terms you have entered.

TIP: You can add additional terms to an existing search in order to narrow the results displayed.



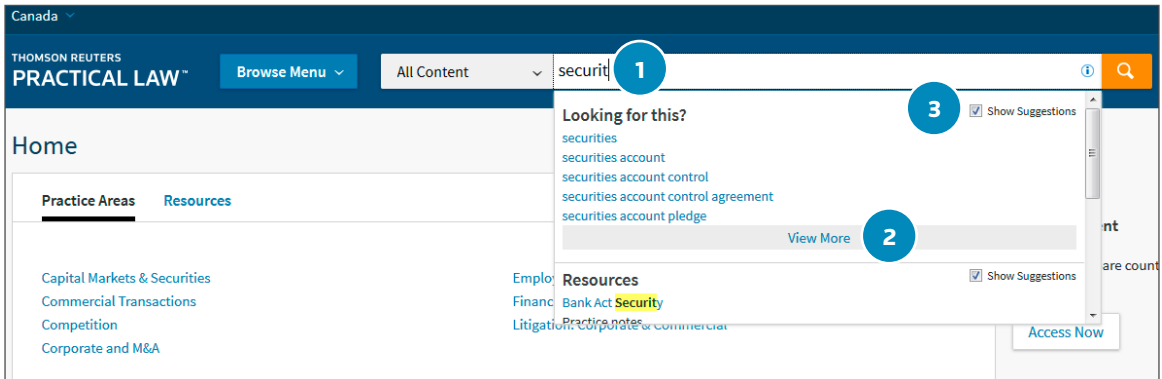
2. You can combine search connectors and field options to run more detailed searches.
3. For advanced searching, we provide a list of useful connectors when you click the  on the search bar.

SEARCH

SEARCH TERMS AND CONNECTORS	
&	Search terms in the same document
Or	Either search term or both terms
%	Not containing terms
""	Search for an exact phrase within quotation marks
/p	Terms in same paragraph
+p	Preceding term within same paragraph
/n	Within n terms of
+n	Preceding within n terms of
*	Universal character
#	Turn off plurals and equivalents
!	Search for terms with multiple endings
TI ()	Search for words in the title

SEARCH

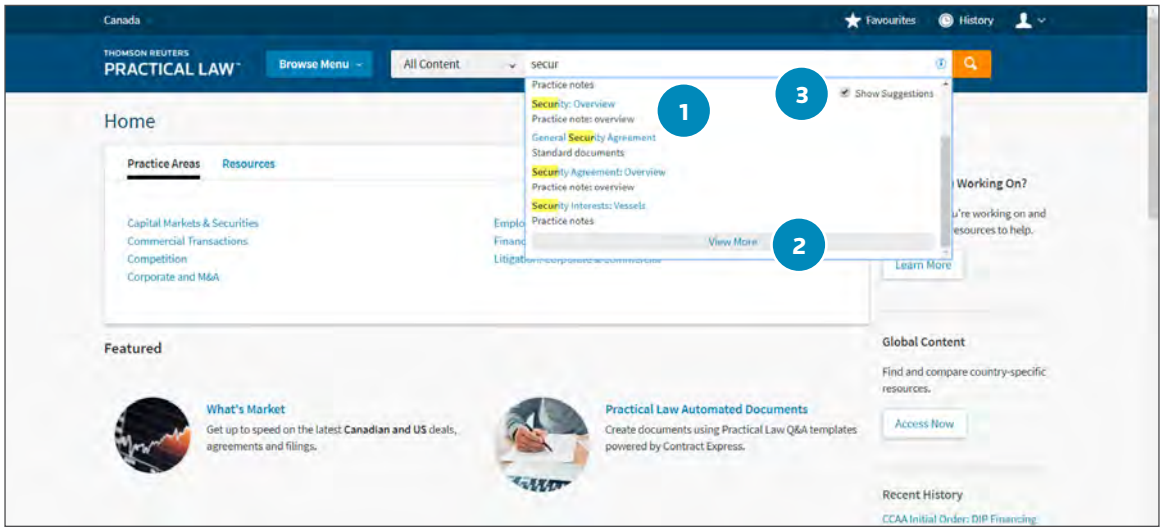
IMPROVE SEARCH RESULTS BY USING SUGGESTED SEARCH TERMS



1. As you begin typing in your search, suggested search terms appear below the Global Search Box. You can then select a term or phrase from the list of suggestions.
2. Select "View More" to view even more suggested search terms.
3. To disable the Search Term Suggestions, deselect the checkbox on the right-hand side of the dropdown. This will prevent the suggestions from displaying on a search.

SEARCH

NAVIGATE FASTER TO A SPECIFIC PRACTICAL LAW CANADA RESOURCE USING SUGGESTED RESOURCES



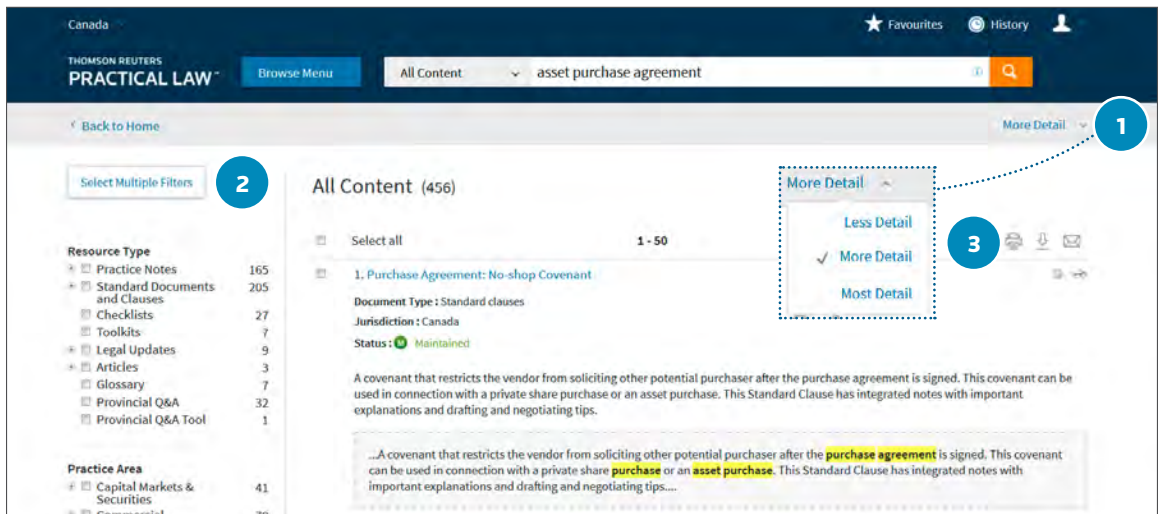
1. Suggested resources also appear below the Global Search Box, under the Suggested Search Terms, as you begin typing in your search. You can then select a document from the list of suggested resources by selecting the name of the document.
2. Select the “View More” button to view even more Suggested Resources. Up to 20 Practical Law Canada Resources will be suggested.

3. To disable the “Resources” suggestions, deselect the checkbox on the right-hand side of the dropdown. This will prevent the suggestions from displaying on a search.

Note: If a Suggested Resource is outside of your subscription, you will be taken to the abstract-only view of the document.

SEARCH

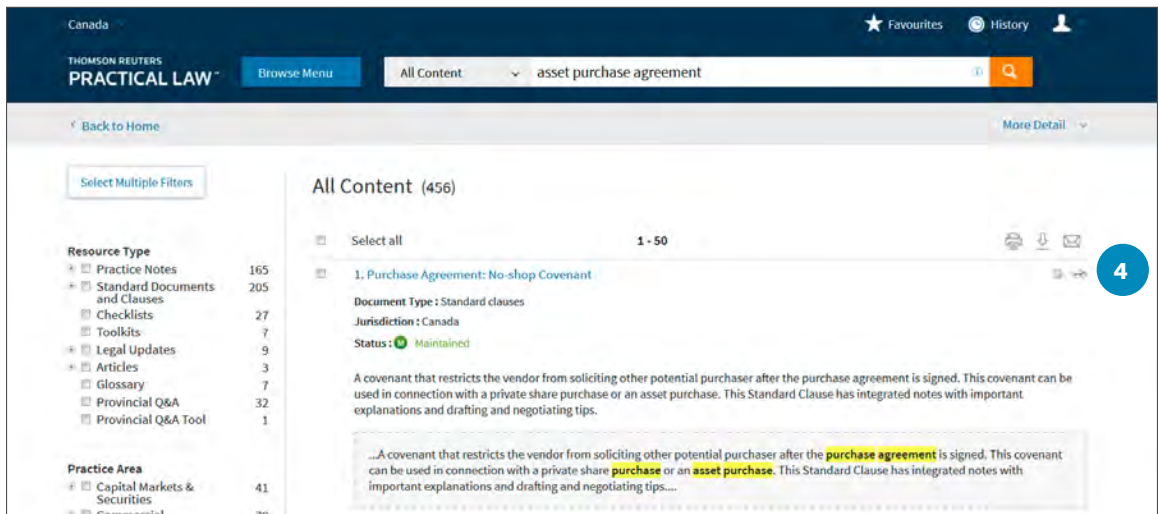
FIND THE MOST RELEVANT RESOURCES BY REFINING YOUR SEARCH RESULTS



1. Change how much detail is displayed in your search results using the detail dropdown option.
 - a. "Less detail" displays basic information on the resource type, jurisdiction, and status of each search result.
 - b. "More detail" displays a snippet of a resource within your results, highlighting where your search terms are used.
 - c. "Most detail" displays up to four snippets of the resources within your results, highlighting where your search terms are used.
2. The "multiple filter" selection mode will allow you to select more than one option before reloading the results page. You can filter your results by resource type, practice area, and jurisdiction.
 - a. Click the + sign within the desired filter on the left-hand side to view topics.
 - b. Check the box to display results only within that specific topic.
3. Print, download, or email resources directly from the search result list.
 - a. Select the resources you want by using the checkbox.
 - b. Choose what action you wish to take using the print, download, or email functions. To find out more about these options, visit the Deliver and share page.
 - c. Finalize your options in the pop-up box.








SEARCH

FIND THE MOST RELEVANT RESOURCES BY REFINING YOUR SEARCH RESULTS



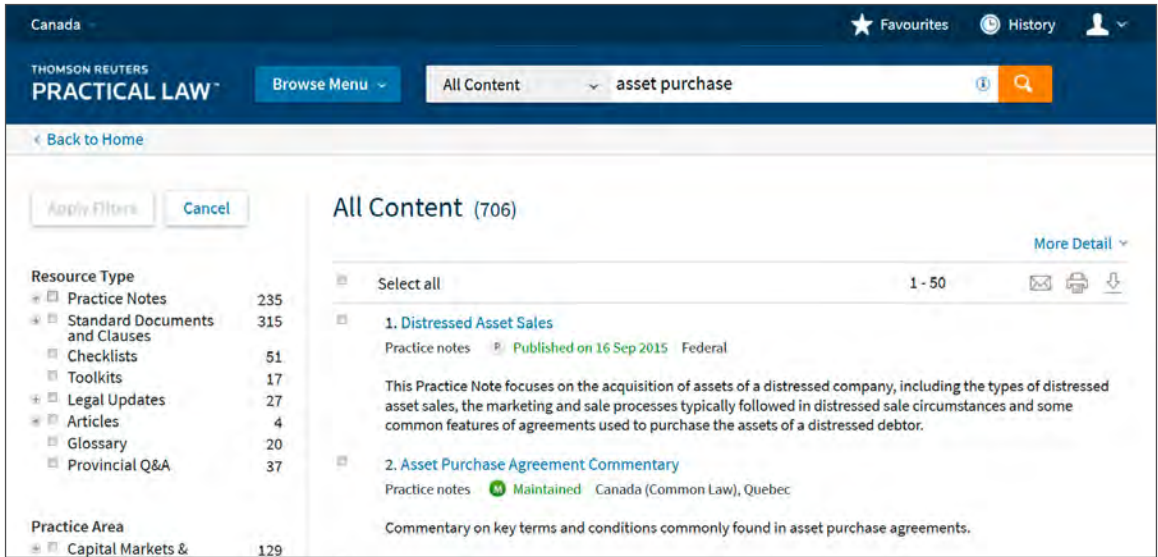
4. The icon display on the right-hand side of the results page indicates if you have annotated or viewed in the last 30 days. A full list of icon indicators can be found below.

Icons

ICON	WHERE WOULD I SEE IT?	WHAT DOES IT MEAN?
	Always visible in the top right-hand corner of the screen	Edit your profile/preferences and Sign out
	To the left of Practice Area/Topic pages	You can add this page to your Favourites
	To the left of Practice Area/Topic pages	This page has been added to your Favourites
	To the right of individual results having run a search	You have viewed this document in the last 30 days
	To the right of individual results having run a search	You have annotated this document
	In the results list when viewing more/most details	This document is fully maintained (regularly checked and updated)
	In the legal updates results list	Date which the legal update was published

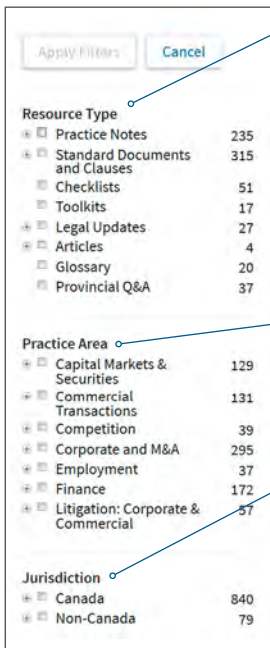
SEARCH

REFINE YOUR SEARCH RESULTS WITH FILTERS



Filters on the left of the screen allow you to narrow down your results. Expand and collapse the list of available filters in each group by clicking on the applicable link. Filters include resource type, practice area, and jurisdiction.

Select filters by clicking on those that you wish to apply to your results. For example, if you want to refine your results to Practice Notes only, click on Practice Notes under the heading Resource Type in the list of filters.



Resource Type

This allows you to refine search results to a certain Practical Law Canada resource type (for example Practice Notes, Standard Documents, and Toolkits).

Practice Area

This allows you to refine search results to a practice area.

Jurisdiction

This allows you to refine search results to a particular jurisdiction.

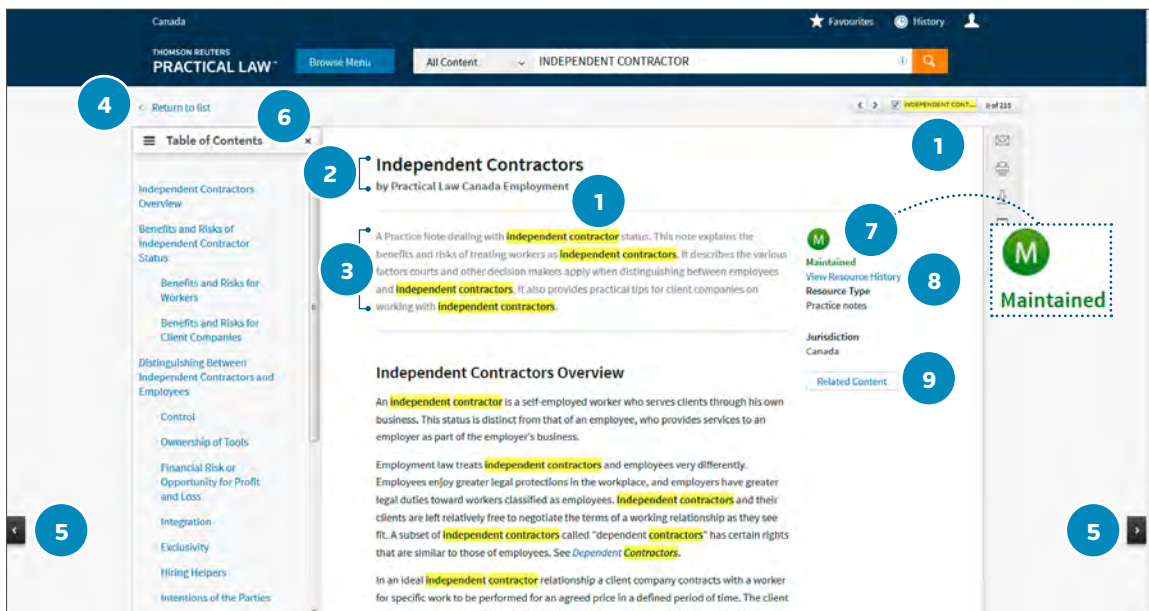
The checkbox next to selected filters shows at a glance what filters you have applied.

You can select as many combinations of filters at one time as you would like. When you click on the "Apply Filters" button, the search results will narrow to reflect your filter selections.

Remove individual filters by deselecting the filter and clicking the "Apply Filters" button again. To undo all filters, click on the "Undo Filters" button.

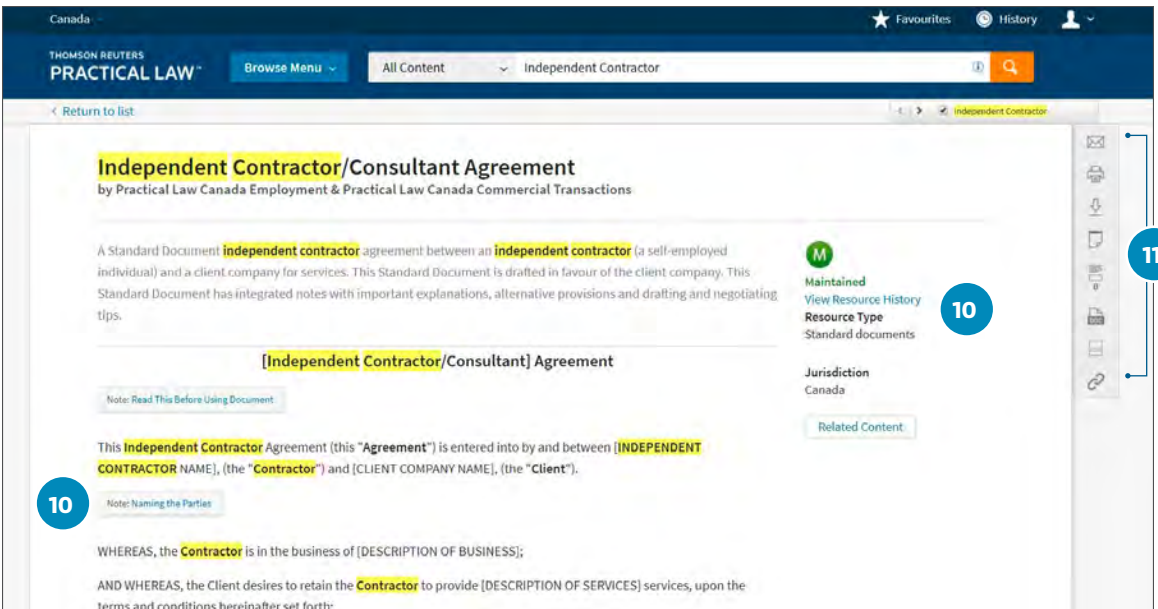
DOCUMENT DISPLAY

OUR RESOURCES ARE CREATED BY OUR EXPERT LAWYER-EDITOR TEAMS USING ROBUST QUALITY CONTROL AND PEER-REVIEWED PROCEDURES



1. Once a resource has been selected from the search results list, you will see your search terms highlighted throughout. You can turn this feature off by deselecting the box at the top of the page.
2. View the resource title and author.
3. The abstract provides a quick outline of what the resource covers.
4. You can return to your search results or topic page list at any time.
5. Use these arrows to navigate between the resources from your search results or topic page without going back to the results list.
6. The “Table of Contents” on the left-hand side allows you to quickly navigate to sections within the resource. You can also close it to expand the view of the resource by clicking the “x.”
7. If the status of a resource reads “Maintained,” you can be confident that the resource reflects current law and practice. A small subset of Practical Law Canada content is updated periodically and the date shown in the status line reflects the currency of the resource.
8. The “View Resource History” link jumps to the bottom of the page where you will find a record of any changes, such as whether the resource has been updated following a development in law, regulation, or marketplace.
9. The Related Content button links you directly to a list of related resources and topics, found at the bottom of each resource.









DOCUMENT DISPLAY



- 10.** When viewing Standard Documents, you may see collapsed drafting notes. Simply select the title to expand or collapse the drafting note without navigating away from the resource you are viewing and click the "x" to close.

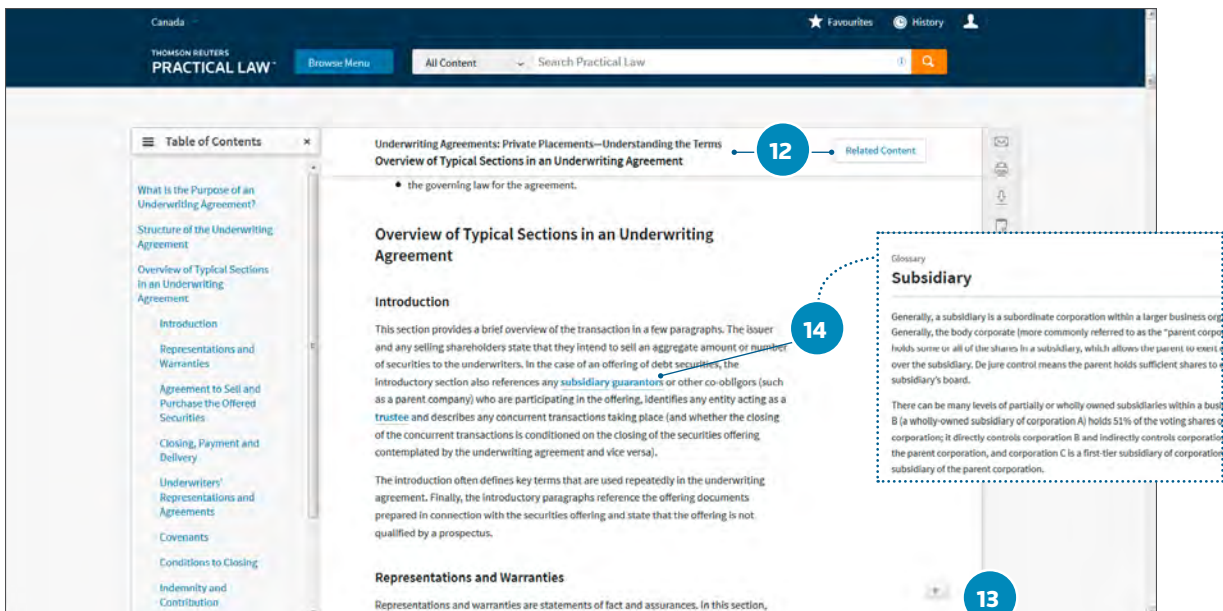
NOTE: To open a usable precedent of a standard document in MS Word format, click on the Open in Word icon.

- 11.** Document Delivery and Share icons are listed to the right.

	Email a resource
	Print a resource
	Download a resource
	Annotate a resource
	Show / hide all annotations within a resource
	Open in Microsoft Word
	Show / hide notes
	Copy Link

TIP: When downloading a standard document, the full Thomson Reuters branded resource will include in-document hyperlinks and annotations. If you decide to "Open in Word" you will be presented with a clean, text-only version of the resource.

DOCUMENT DISPLAY



12. The title, section heading and Related Content button remain visible as you scroll down the resource.

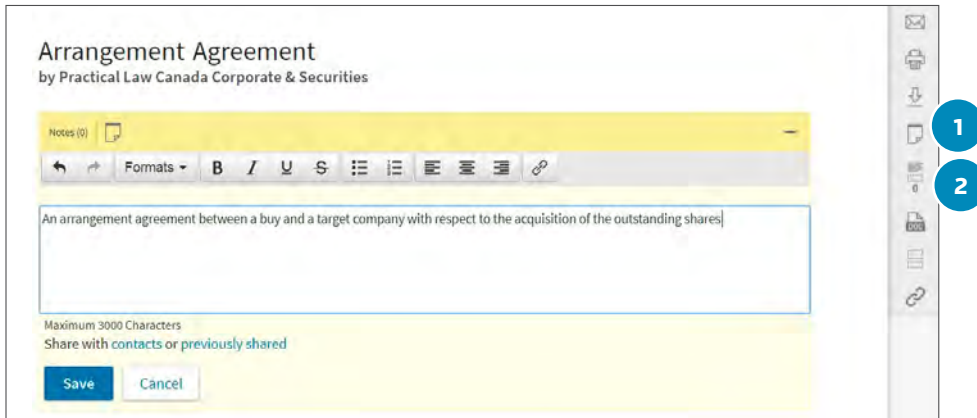
13. Click the arrow at the bottom of the resource to be taken to back to the top at any time.

View our glossary of legal terms

14. Glossary terms within a resource are easy to identify as they are bolded and italicized. Click on a glossary term to view the definition and related content.

ANNOTATIONS

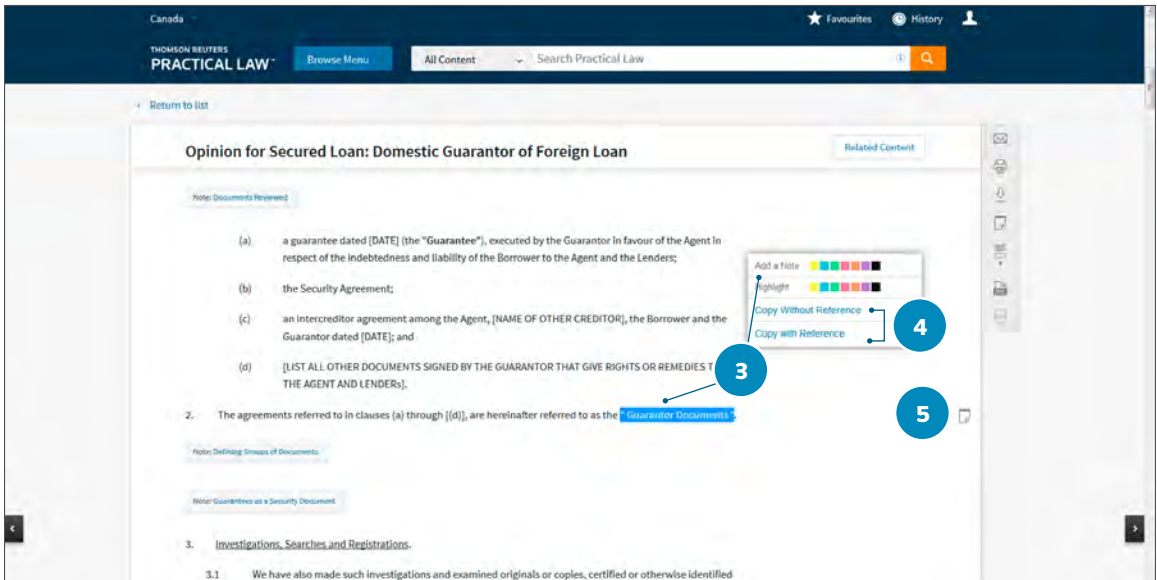
CREATE ANNOTATIONS ON RESOURCES



1. Supplement a whole resource with additional annotations by selecting the annotation icon.
2. Show / hide all annotations.

ANNOTATIONS

CREATE ANNOTATIONS ON RESOURCES



3. Create colour-coded annotations and highlight text to capture and record useful know-how within a resource.
 - a. Highlight the desired snippet of text.
 - b. A list of options will appear on screen.
 - c. Select the “Add to a Note” or “Highlight” option.
4. Embed document content into internal know-how.
 - a. Highlight the desired snippet of text.
 - b. A list of options will appear on screen.
 - c. Select the “Copy Without Reference” to only copy the text without any citations or “Copy with Reference (Standard)” to include citation to the original resource.

5. The annotation icon will appear in the right-hand margin of a resource where an annotation has been added.

TIP: When you annotate a resource, the annotation icon will also appear next to the resource within the search result list and Topic Page list.

SHARING ANNOTATIONS

Save your own personal annotations or share your annotations with your firm or organization.

USEFUL CONTACTS

Our customer service team is available weekdays 8:30 a.m. to 4:30 p.m. (ET)

 PLorders.legaltaxcanada@tr.com

 1-800-387-5164

REQUEST TRAINING

No matter where you are in Canada, you can benefit from training with a Practical Law Canada Learning Consultant.

 CustomerLearning.LegalTaxCanada@TR.com

 1-800-387-5164, option 3

ASK A QUESTION

If you can't find a particular resource or have a query about something we've written, contact us by clicking on the Contact the Team button.

ca.practicallaw.thomsonreuters.com

