

ProView Webinar – Transcript

Welcome to your Introduction to ProView video.

ProView is the next generation platform that allows you to view your digital texts and looseleaf subscriptions on the go. In this video we will discuss:

- Logging In with OnePass
- How to set up your options and find help
- Performing keyword and Boolean searches
- Creating annotations and PDFs for sharing and printing
- Using document level tools
- Working with the Table of Contents, and
- Working with the website version vs. the App version of ProView.

First of all, let's log in with our OnePass. This is the ProView sign in page. To access the ProView website, you will need to create a OnePass profile unless your firm is using an IP Authenticated login. If they are, then you won't need to use OnePass, but you may not have access to the annotation features. If you have any questions regarding IP Authentication, please contact your Customer Service Representative or Tech Support. You can also download ProView as an app for both Apple and Android, which I will show you at the end of this video. The next thing we are going to explore is setting up your options and finding help. We will also take a tour of the home page.

Here is the home page. You will notice that the front page has a simple, clean lay out. We have got this banner here with all of your recently read materials; you can go through these Quick tips by refreshing them. You can minimize by clicking on this arrow.

Next we have the help function, which is the bubble with the question mark on it. If you click on it, it gives you this transparent, smoky layer with a bunch of different capsules around different features of the website. By clicking on the capsule, an orange pop up will come up and give you more information about what that is. If you click on this plus sign, it will open up the help page. From the help page you can download ProView. You can download it as an app for both Apple and Android; you can also download it for your desktop for both Windows and Mac. You can get technical support – Canada is down here between Brazil and Chile. You can look at the web browser help – I am going to be reviewing all of these topics today, but you can also download the help as a pdf to review later. You can look at the licensing agreement; here are the terms for Canadian customers, and you can also view the privacy statement.

When you are done, just close this window and you can go back to the home page. To get rid of this smoky layer, just click somewhere where there is not a capsule.

Next in the top right hand corner we have this silhouette head – that is your account. By clicking on it, you can contact us, review the privacy policy, and refresh the Library or Sign Out.

Over on the left there are a couple of practical and aesthetic functions to help you with your library.

The four squares display your books in a tile format, with the cover on the left and the information on the right in a compact tile. If you set it to a list, you have the cover on the left, information in the centre and this "I" on the right. By clicking on this "I", this tile will slide over from the right and you can open the title. You can also open the title by clicking on the cover over here. All of the title and publishing information is here, and you can also Import Annotations that you have made from this book to another – so you can copy any highlights and notes into your revised and updated editions as you acquire them instead of manually transcribing them. You can also open the book from here by clicking Open Book.

Choosing how you want your library to be displayed is a matter of personal preference – either of these displays are much more intuitive and visual than the list on the side from eReference.

You can sort your books. Just click this field and a drop down menu will appear. You can sort your library by: title, type, jurisdiction, publisher, subject and ownership.

On the far right there are letters under the Magnifying Glass. The letters allow you to jump to titles alphabetically, which is useful if you have a large library.

Let's click on the magnifying glass and open up the search panel. This will search your entire library.

There is a search box that allows you to perform a keyword search on your entire library. For example, let's say you had a case where a dog was used to search a student's backpack at school. We can put the phrase "sniffer dog" into the search box – make sure to use quotations marks so that it searches the words together as a phrase.

On the old eReference platform, you had to scroll through unrelated material to get to the ones with the search hits. Instead of having to go through and expand the tree to see each result, it's pretty easy to find the search terms within the book with just one click.

You can filter your results by type of title, jurisdiction, publisher, subject and ownership.

You can see how many hits are in each book. Let's look in The Law of Privacy in Canada and look at some of the ProView features at the document level.

As you can see, the first hit has what looks like an orange movie ticket next to it, and additional hits for our search term are listed underneath that. You can click on hits from the Table of Contents, or you can also jump to them by clicking on these Orange arrows in the bottom right hand corner.

You can easily browse through the Table of Contents by clicking down through the various levels. You can come back up to the top by closing each level.

Let's perform a search – there are a couple of ways that you can do this, and we encourage you to use the method that you are most comfortable with.

First, let's look at a Keyword Search. Since we are in The Law of Privacy in Canada, let's search for "intrusion upon seclusion" – make sure to put quotes around a phrase so that all of the words are searched together. Now, if we go to the first hit, we will see our search terms highlighted.

There is a case highlighted in blue – Haskett. If you click on the link, we will be prompted to log into WestlawNext Canada and we can see the full case.

Secondly, we can build a simple Boolean search just like in the old eReference.

If you need help with terms and connectors, just click Help and then click on the bubble around the search box. This will take you to a chart of accepted Boolean functions. Expand the pop up and it will take you to the Search section of the help. Going back to ProView, let's search for "video surveillance" /5 reasons – this will find the word "reasons" within 5 words of the phrase "video surveillance" – the search will usually bring up those terms within the same sentence.

Clicking on a footnote will bring up the full citation of the case discussed.

Now let me show you how to create annotations.

You can highlight, add a note, and highlight text just as you would on a hard copy. Adding annotations on the old eReference platform had quite a few more steps and was not as seamless or intuitive.

Going back to the Table of Contents tools – this brings up all of your bookmarks, annotations and highlights – you can jump to an annotation from here, or delete them. You can also delete annotations by right clicking on them.

There are a couple of different ways to create a pdf in ProView. Once you have created the pdf, you can save it to your computer, print it or share it with a colleague by e-mailing it them.

You can highlight text and select Share. Notice how the citation of where you found this material is automatically inserted into the top of the page - almost exactly the WestlawNext Canada "Copy with Reference" function.

You can also create a pdf of the section that you are currently looking at by going to the top right hand corner and clicking the box with the arrow jumping out – and select Current TOC Section.

Let's start at the top left hand corner:

1. Click Library to go back to home page; the drop down menu brings up list of recently read.

2. Going over to the top right hand corner; the box with an arrow jumping out – create & share pdf – will show you later.

Cog – Options:

- Languages – English UK/US, French, Spanish, Portuguese, Korean;
- Font – type of font;
- Text size – bigger or smaller text;
- Colour Scheme – Default is black characters on a white background, but you may find it easier on your eyes to switch to the grey background. If you are reading in your bed at night or a darkened room, reading white characters with a black background may be more comfortable. Colour labels – you can create “virtual flags” for your books by customizing the names of different colour labels. However, if you add titles to these labels, they will be set for your whole library, so you may want to pick general terms such as “Case Law”, “Legal Issue”, etc.

On the left, the Table of Contents has clickable sections. The Table of Contents also has its own set of tools:

- Table of Contents button – looks like a list – brings you back to the Table of Contents.
- Magnifying glass – search within book.
- Paper with a pen – brings up all of your bookmarks, annotations and highlights – I am going to show you how to highlight and annotate in just a moment.
- Clock – Your history of what you have read in this book – can clear history by clicking this button.
- Arrows and slide bar – navigates through the pages.

We have been exploring the website version, now we can look at the app version. I am going to open up the Windows app version and to show you how it functions. This is a program that you download from the ProView site and install on your PC, just like any other program. When you open the ProView icon from your desktop or from the Start Menu, it will bring you to your ProView library without the need to sign in.

As you can see, the mobile version looks pretty much the same as the website version, so you can take all of the features of ProView with you, no matter where you go.

The buttons are in slightly different places show buttons at top, open a book. In fact, the app version has one additional feature – you can add bookmarks.

Plus sign under the Options – add a book mark. You can see all of your highlights, notes and bookmarks under the annotations button in the Table of Contents.

The only thing that the app version can't do quite yet is to transfer annotations from an older book to a newer one, but the developers are always making improvements.

With that, we have come to the end of our video today.