NAVIGATE THE COMPLEXITY OF TAX

Tolley® Guidance
tolley.co.uk/guidancetraining
To get the most out of your Tolley®Guidance product, flick through our detailed user guide. Before diving into the more detailed part of the guide, have a look at the quick tips found below.

Tolley®Guidance Quick Tips:

Searching
To search on Tolley®Guidance you can use the search box function. This function allows you to search across one module or multiple modules at a time. The global search enables you to get a wider range of results and makes it easier for you to search across all your modules. Much like the popular online search engines, the keyword search function allows you to type a string of words that you are interested in. You can also search over a single content type (e.g. Guidance) by selecting the tab in the Advanced Search box. Search results are split into the relevant content type, so you can see a filtered set of results for each document type.

Browsing
To fully browse Tolley®Guidance, click ‘view all topics’ on the top left. Once you have found the area that interests you, simply click on the link and it will display the content type tabs across the top of the page so you can see those types of documents for your chosen sub-topic.

News & Analysis
Each module has its own news pod where you can see all the relevant news for that area of tax. The headlines of the four most recent articles can be viewed at a glance, or you can click ‘view more’ to see the full list of articles from the last 30 days.

New and Amended Content
This pod contains a list of all the content that has recently been added to Tolley®Guidance. Again, the four most recent additions can be viewed at a glance or you can click ‘view more’ to see the whole list.

To view bite-sized videos that demonstrate how this functionality works, visit http://www.lexisnexis.co.uk/en-uk/help-and-support/tolley-guidance.page
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To login, simply input your User ID and password and click ‘Sign in’.

For further information about Tolley®Guidance, click ‘Find out more’.

For further information about Tolley®Library, go to the Tolley®Library section and click ‘Find out more’.

If you have forgotten your password, click ‘forgotten your password’ then simply enter your user ID and press ‘Submit’. A new password will then be generated.

To check that you have the minimum hardware capabilities needed to run Tolley®Guidance, click ‘View system requirements’.

If you want your computer to remember your sign-in information, tick the box and the next time you log in you just need to input your User ID and it will automatically remember the rest of your sign-in information. Only enable this function if you are not on a shared computer or you do wish to view Tolley®Guidance on more than one device.
When you access the Tolley®Guidance homepage, only the modules within your subscription will appear on the screen. The green line under the module is the tax area you are currently working in. You can easily switch to another area by clicking on another module.

The global search box allows you to enter a key word which will then be searched across your chosen area or all subscribed modules. Simply click on the filter button to the left of the search box to choose a search range.

The ‘Browse Topics’ box allows you to navigate to all the relevant content (guidance notes, templates, examples, etc) within a sub-topic. Click on ‘View all topics’ to show the expanded menu.

You can conduct an Advanced Search within a module. This allows you to search across specific content by using the category tabs. The search forms will change according to the type of material you are searching for.

The ‘News and Analysis’ pod shows the news relevant to the module. The headlines of the four most recent articles can be viewed at a glance or you can click ‘View more’ to see the full list of articles from the last 30 days.

The ‘New and Amended Content’ post contains a list of all the content recently added to Tolley®Guidance. The headlines of the four most recent additions can be viewed at a glance or you can click ‘View More’ to see the full list.

On the top left you can access additional platforms with ‘...More icon’. You can also set up or modify your alerts with ‘Alerts’. You may also change your personal settings (such as change your password) with the User icon.
Once you have carried out your search, you can click the content type tabs across the top to see a filtered list of results for that document type.

Click on a new document to open it. When you left click, the document opens in the same window. To open in a new tab, simply right click and select new tab.

You can also use this search box to search over all content types.

Each item on the search results list specifies its document type and module source so you can easily place the results in context.

To view bite-sized help videos that demonstrate how this functionality works, please visit www.lexisnexis.co.uk/help-and-support/tolley-guidance
When on the Tolley®Guidance homepage, you can browse the topics on the left-hand side. Each topic has subtopics hyperlinked below it and by clicking on one of these hyperlinks, you will be led directly to the landing page. When on the landing page you can then access the various types of content falling within the sub-topic.

1. The table of contents on the left-hand side shows you where you are in the module. You can also use this table of contents to browse other parts of the module.

2. When you browse within Tolley®Guidance you will find a list of all the guidance notes in a given sub-topic. You can click on the name of the guidance note to open it. Alternatively, if you click on the arrow next to the title of the guidance note, it will expand to show you the main headings within it so you can decide whether to click on it.

3. To see the contents of all the guidance notes in the same sub-topic, click on ‘Expand all.’ Once you have clicked this button, if you want to return to the list you simply click it again. This functionality is especially useful when you are in the ‘Examples’ tab as you can see the titles of the individual examples in a particular area.

4. To see the other types of content in the sub-topic, click on the relevant tab.

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On the guidance note itself, the links in blue are hyperlinked and lead through to relevant documents. Where the link will take you out of the module of Tolley®Guidance that you are in, the link is marked ‘subscription sensitive’. When you click on the link it will bring up a box to tell you where that content is found. If you have the other module of Tolley®Guidance or the book within Tolley®Library within your subscription just click on the link and it will resolve.

To Bookmark, Print, Email, Download to Word or Copy the URL, simply click on the appropriate icon and further instructions will appear.

If you would like to return to a document you have previously viewed, you can click on the document link stored in your ‘My Documents’ box on the left-hand side under ‘Recently Viewed’.

If you would like to view other related documents, there is a breadcrumb trail at the top of the screen showing which topic your document lies in.
Flowcharts, letters and checklists can be found in the ‘Templates’ tab.

Click on the ‘click here to view PDF’ to open the template.

If you have navigated to a piece of content using search, you can return to your results page by clicking ‘return to results’ at the top left-hand side of the page as shown above. If you have used browse to reach the note, you can return to the sub-topic.

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Legislation

You can search for legislation via the search box or you can click on a specific link from a guidance note.

Use the ‘Table of contents’ on the left-hand side to navigate through the Act or Statutory Instrument.

To ‘Bookmark’, ‘Print’, ‘Email’, ‘Download’ to Word, or ‘Copy the URL’, simply click on the appropriate icon and further instructions will appear.

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You can search for the HMRC manuals using Tolley®Guidance or click on a specific link from a guidance note.

1. Use the table of contents on the left-hand side to navigate through the HMRC manual that this extract appears within.

2. To 'bookmark', 'print', or 'download' to Word, simply click on the appropriate icon and further instructions will appear.
**USER GUIDE**

**Administrative options**

1. **Other Tolley Services:** Select the square logo to seamlessly link to other platforms within your subscription by using the dropdown menu to select from Tolley Library, Tolley.co.uk, Taxation Magazine, Tax Journal, Tax Analyst, Tolley VAT Updater, Tolley Tax Tutor or Tolley Seminars Online.

2. **Manage news alerts:** You can easily set up or modify your alerts through an easy process which enables you to turn on alerts, choose your topics and the email frequency.

3. **Send us feedback:** To let us know what you think about Tolley®Guidance, simply click on the link, fill in the feedback form and submit. You can also give us feedback by using the button at the bottom of the page of any guidance note, example, template or news piece.

4. **Contact us:** This takes you through to our website, where you can contact us via phone or fill in an information request form.

5. **Change password:** To change your password, simply enter your current password and then choose a new password. If you have forgotten your password, you will be prompted to enter some basic security information and a new password will be sent to your email address.

6. **About Tolley Guidance:** Access our training videos at any time to refresh your memory on Tolley®Guidance functionality on our help.lexisnexis.co.uk website.
As the UK’s only provider of critical tax information, in-depth reference, ground-breaking training and learning resources and unique market insight, Tolley is there by your side with four product families designed for tax professionals.

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Please visit
www.lexisnexis.co.uk/help-and-support/tolley-guidance

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