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IntelliConnect

888-224-7377

CCHGroup.com

CCH made significant changes to its research platforms in the summer of 2009 when it launched IntelliConnect, its next generation research platform to replace the previous offering, Tax Research Network. With the switch to IntelliConnect, the key tax, human resources, payroll and employee benefits databases for domestic and many international jurisdictions are on a common, consistent platform (although CCH's accounting & auditing research service, Accounting Research Manager, remains on a separate, legacy platform). Attorneys will like the unification of legal, tax and business content under one research platform.

Basic System Functions

Users can use many search techniques to locate guidance, including keyword searches; natural language searches; browsing publications, topical indexes and journal articles; and by clicking on linked guidance from within ProSystem *fx* Tax. Like with other applications, searches can be restricted to specified sources or groups of publications using a hierarchical "tree" structure similar to the folder structures in Windows Explorer. Common research queries can be saved to folders and used as templates for repeat research memoranda. Articles, rulings and publications can also

be cited using external links into IntelliConnect (e.g. a web address/URL) or can be e-

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the U.S. market is the transition to IntelliConnect from Tax Research Network, which began in the second quarter of 2009. CCH also offers Accounting Research Manager (ARM), which is a research service targeted at technical accounting and auditing research, as well as SEC reporting, governmental accounting and auditing, and GRC issues (e.g. ICFR/Sarbanes-Oxley). ARM has not yet migrated to the new platform but it is expected to do so at some point in the future.

IntelliConnect includes topical analysis and practical guidance from BNA, as well as exclusive proprietary content from CCH, including newsletters, daily updates from Federal Tax Day, Explanations and GuideBooks, Practice Tools, and many other sources. 5

Customization

Users can configure alerts using the Tracker News based on jurisdictions, practice areas and keywords so that they receive the latest developments of interest in their Tracker News feed. They can also display or conceal content associated with any or all databases in eight general practice areas: Benefits, Commodities & Derivatives, Corporations & Business Organization, Investment Management, Mergers & Acquisitions, Pensions, Securities, and Tax & Accounting. Within Tax & Accounting, users can further restrict their searches to categories such as Accounting & Auditing, Federal Taxes, Financial & Estate Planning, International Tax, Specialized Tax, State Taxes, and Wealth Planning/Management.

Documents from the current session can be saved to a temporary document tray for use later in the same research session, and can be saved to a hierarchical structure of research folders that save documents permanently. And such documents can include annotations, summaries and other information added by the user. 5

Integration/Import/Export

IntelliConnect includes links to CCH's ClientRelate product, which mines client files

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Search results can be copied and pasted to Microsoft Word, printed or written to PDF. Tools and analysis are also cross-referenced with links to other IntelliConnect sources such as the Internal Revenue Code, IRS publications, tax court cases, and other primary sources so that it is easier to review all relevant subscribed content associated with a topic. 5

Help/Support

IntelliConnect offers a wide range of reference cards, reference manuals, training materials, videos and free training to help users increase their effectiveness and efficiency with the service. Telephone and web-based support is also available to subscribers at no additional charge. Like with other offerings reviewed in this issue, new users will want to take as many of the web-based training courses as possible so that they understand how to use this powerful tool to find the right guidance quickly. Although the service is not hard to use, the breadth and depth of content available in this offering, as well as the wide range of methods that can be used to find content, makes training necessary for users to get the most out of their investment in the service. 5

Summary & Pricing

IntelliConnect is an outstanding new research product which integrates tax, accounting, business and legal content into one interface. Although accountants, in general (and technical researchers in particular), are resistant to change, the integration afforded with Microsoft Office, CCH's tax applications, and tools like CCH ClientRelate make this a very compelling research offering. Pricing starts at \$200 and goes up from there depending on the desired subscriptions. 5

2010 Overall Rating 5

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