# Table of Contents

Getting Started.................................................................2
Search .............................................................................2
Terms & Connectors or Natural Language .................................2
Connectors ....................................................................3

**Books** ........................................................................4
Advanced Search Options for Books ........................................4-5
Command Line Search for Books ........................................5

**Forms** .........................................................................6-7
Advanced Search Options for Forms ........................................6-7
Command Line Search for Forms ........................................7

**Transcripts** .................................................................8
Advanced Search Options for Transcripts .................................8
Command Line Search for Transcripts .....................................8

**All Content** ...............................................................9
Advanced Search Options for All Content .................................9

**Results Page** .............................................................10

**Search Bar** ..............................................................10

**Manage Your Search Results (Email, Print, Add to Bookshelf)** .................................10

**Save Search** ............................................................10

**Permalink** .................................................................10

**Refine Your Search** .....................................................10

**Filters** .................................................................10

**Browse** .....................................................................11-14

**Document Review** ......................................................11
Inside a Book ................................................................12
Inside a Notes & Marks..................................................13
Inside a Chapter ...........................................................14
Inside a Form ..............................................................15
Inside a Program Transcript ............................................16
Inside a Program Transcript Segment ..................................17

**My Bookshelf** ..........................................................18

**My History** ............................................................19-22
Search History ................................................................19-20
Viewing History ............................................................21
Notes & Marks ...............................................................22
Getting Started
There are four main areas of PLI Discover PLUS: Search, Browse, My Bookshelf, and My History.

1. Search
2. Browse
3. My Bookshelf
4. My History

Search
There are four sub-tabs under Search: Books, Forms, Transcripts, and All Content. Each sub-tab allows you to search across the specific format type. Under each tab, you have the option to search PLI Discover PLUS using Terms & Connectors or Natural Language.

Terms & Connectors and Natural Language
Terms & Connectors allows you to build a precise search by using connectors, command line language, or simple keyword(s) or phrase(s).
Natural Language allows you to search broadly by using keyword(s) or phrase(s).
Connectors

**And/\&:** The *and* Boolean operator can be entered “and” or “\&”. It is not case sensitive. It will find documents containing both terms entered.

Example: *Dodd-Frank and SEC; Dodd-Frank & SEC*

**Or:** The *or* Boolean operator is not case sensitive. It will find documents containing either term(s) entered.

Example: “*Foreign Corrupt Practices Act* or *Global Anti-Corruption Enforcement*

**Not/%:** The *not* Boolean operator can be entered “not” or “%”. It is not case sensitive. It retrieves the term(s) preceding and excludes the term(s) following “not.”

Example: *Obviousness not Patent* will find documents that contain “obviousness” but do not contain “patent.”

**Exact phrase:** The exact phrase operator is quotation marks: “…”. It will find terms appearing in the exact order in which they are entered.

Example: “*Capital Gains Research Bureau*” will find only that exact phrase.

**Within sentence:** The *within sentence* connector is “/s”. It will find two terms or phrases within the same sentence as one another.

Example: “*Volcker Rule* /s “private equity”

**Within paragraph:** The *within paragraph* connector is “/p”. It will find two terms or phrases within the same paragraph as one another.

Example: “*Citizens United* /p speechnow.org

**Within n terms:** The *within number of terms* connector is entered “/n” or “w/n” where “n” represents the number. It will find two terms within a certain number of words of one another.

Example: “*privacy litigation* /4 *Facebook* will find “privacy litigation” within four words of *Facebook*

**Truncation or root expander:** The *truncation* or *root expander* operator is the exclamation mark: “!” It will search for the variant endings of a root word.

Example: *whistleblow!* will find “whistleblow”, “whistleblower”, “whistleblowers”, “whistleblowing”

**Wildcard:** The *wildcard* operator is the asterisk: “*”. It represents one character.

Example: *practi*cing will find for “practicing” and “practising”
Books

Books include PLI Treatises, Course Handbooks and Answer Books.

Search Books using Terms & Connectors or Natural Language. PLI Discover PLUS will search across all fields, including the full-text of the book’s chapters.

Advanced Search Options for Books

The Advanced Search Options can be used in conjunction with the main search box or alone. The fields are as follows:

**Book Title/Chapter Title:** The book title/chapter title advanced search field can be used to search within a specific book or chapter. Enter the exact title or keywords from the title.
Example: *Friedman on Leases* or “Whistleblower Rules”

**Author:** The author field can be used to search for publications authored by a specific individual.
Example: “Patrick A. Randolph”

**Author Affiliation:** The author affiliation field can be used to search for the law firm, organization, or institution for which an author worked at the time the book or chapter was published.
Example: “Milbank, Tweed, Hadley & McCloy”

**Date:** The date range can be set to include any range of years. For Course Handbooks and Answer Books, the publication year is the year in which the title was published. For Treatises, this is the year in which the most recent supplement appeared.
**Practice Area:** PLI designates one or more practice areas for all content. Use the Practice Area drop-down menu to limit your search to items in a specific practice area or practice areas.

- Accounting
- Antitrust
- Banking
- Bankruptcy & Restructuring
- Children's Law
- Communications/Telecommunications Law
- Corporate and Securities
- ERISA
- Employment
- Energy
- Environmental
- Estates & Trusts
- Ethics/Professional Responsibility
- Health Care
- Insurance
- Intellectual Property
- International
- Litigation
- Municipal Law
- Pro Bono
- Professional Skills
- Real Estate
- Tax

**PLI Item #:** Each PLI title is assigned a searchable item number.
Example: 35302

**ISBN:** Each book receives an ISBN number, which can be entered in Discover PLUS to search for a specific book. Enter the number without hyphens.
Example: 9781402418679

**CHB Spine #:** Each print Course Handbook (CHB) receives a spine number; these numbers are searchable on Discover PLUS. The CHB Spine # consists of two elements, the Series and the actual number.
Example: Commercial Law – A, 920

**Command Line Search for Books**

PLI Discover PLUS supports command line search language for the power searches.

<table>
<thead>
<tr>
<th>Field</th>
<th>Command Line Value</th>
<th>Examples (use parentheses for phrases)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author</td>
<td>au=</td>
<td>au=Friedman or (au=Milton Friedman)</td>
</tr>
<tr>
<td>Author Affiliation</td>
<td>aa=</td>
<td>aa=Skadden</td>
</tr>
<tr>
<td>Book Title</td>
<td>bt=</td>
<td>bt=contracts or (bt=Equipment Leasing-Leveraged Leasing)</td>
</tr>
<tr>
<td>Chapter Title</td>
<td>ct=</td>
<td>ct=evidence</td>
</tr>
<tr>
<td>ISBN</td>
<td>isbn=</td>
<td>isbn=1402407548</td>
</tr>
<tr>
<td>PLI Item # or Id#</td>
<td>id=</td>
<td>id=27150</td>
</tr>
<tr>
<td>Publication Year</td>
<td>py=</td>
<td>py=2010</td>
</tr>
</tbody>
</table>
Forms
PLI Discover PLUS contains searchable legal forms. These forms are taken from PLI Treatises and Course Handbooks, and are fully indexed and downloadable.

Search Forms using Terms & Connectors or Natural Language. PLI Discover PLUS will search across the following fields: form name, form description, and keywords.

Advanced Search Options for Forms
There are several fields that can be used to narrow a search, either in conjunction with a phrase or term entered into the search box or alone. The fields are as follows for Forms:
**Form Title**: This field limits a search to a particular form title. Enter the form title or keyword(s).

Example: “Form N-4 Registration Statement Due Diligence Grid”; “accredited investor”

**Practice Area**: PLI designates one or more practice areas for all content. Use the Practice Area drop-down menu to limit your search to items in a specific practice area or practice areas.

**PLI Item #**: Each PLI form is assigned a searchable item number.

**Form Type**: Search forms by type. There are 12 form types:

**Annotations**: Forms with a clause or paragraph from a contract or similar document, with a discussion by the author of the pros and cons for using that given clause in a full contract. Annotations usually explain what the clause means.

**Checklists**: Sample or template checklists with boxes for a specific purpose that a user may use or modify to fit his or her specific purpose.

**Clauses**: Some forms include clauses that may be used as part of a contract or similar document, but do not constitute an entire contract.

**Contracts**: Sample or template contract that may be modified by the user to fit a specific purpose.

**Documents**: Corporate documents including official filings, charters, term sheets, schedules, credit applications, policy statements, diagrams, sales scripts, valuation analyses, and plans for securities distribution. Also included are templates for patent applications, living wills, health care proxies, and powers of attorney

**Letters**: Sample and template letters commonly used by attorneys in various phases of legal practice.

**Model Court Orders**: These forms contain standard language and arguments that may be submitted to a court, along with spaces in which a user would fill in his/her own information.

**Official Forms**: Forms from a government agency that have fields for the customer to fill in, such as name, address, Social Security Number, etc.

**Pleadings/Motions**: Contain standard language, arguments, and formatting necessary for a submission to a court, along with spaces in which a user would fill in his/her own information.

**Questionnaires**: Forms in a Q&A format, usually with boxes to indicate the user’s response.

**Required Notices**: Forms that a user may be required to post (e.g., a “Fair Housing Poster”), as well as forms containing information that must be disclosed, by law, in a sale of securities, real estate, or any other highly regulated transaction.

**Wills/Trusts**: Sample or template will or trust with open space for a user to fill in his/her own information.

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**Command Line Search for Forms**

<table>
<thead>
<tr>
<th>Field</th>
<th>Command Line Value</th>
<th>Examples (use parentheses for phrases)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form Name</td>
<td>fn=</td>
<td>fn=contract or (fn=aircraft agreement)</td>
</tr>
<tr>
<td>Form Keyword</td>
<td>kw=</td>
<td>(kw=parties in interest)</td>
</tr>
<tr>
<td>PLI Item # or Id#</td>
<td>id=</td>
<td>id=40788</td>
</tr>
</tbody>
</table>
Transcripts

PLI Discover PLUS contains full transcriptions of many PLI programs. Please note that not every program is transcribed. For a complete list of program transcriptions available, click here.

Search PLI program transcripts using Terms & Connectors or Natural Language. Discover PLUS will search across all fields, including the full-text of the transcript.

Advanced Search Options for Transcripts

There are several fields that can be used to narrow a search, either in conjunction with the main search box or alone. The fields are as follows:

**Segment Name:** Use this field to search for a specific segment from a program. Enter the exact name or keyword(s) from the segment name.
Example: “Patent Trial, Appeal Board Transformation and AIA Implementation”

**Program Name:** Use this field to search by program name. Enter the exact name or keyword(s) from the title.
Example: “Secured Transactions 2012: What Lawyers Need to Know About UCC Article 9”; or “Lanham Act”

**Speakers:** Use this field to search for a program transcript by the speaker’s name.
Example: “Juan Cartagena”

**Date:** The date range can be set to include any range of years. PLI has been transcribing programs since 2011.

**Practice Area:** PLI designates one or more practice areas for all content. Use the Practice Area drop-down menu to limit your search to items in a specific practice area or practice areas.

**PLI Item #:** Each PLI program is assigned a searchable item number.

Command Line Search for Transcripts

<table>
<thead>
<tr>
<th>Field</th>
<th>Command Line Value</th>
<th>Examples (use parentheses for phrases)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Name</td>
<td>pn=</td>
<td>(pn = Secured Transactions)</td>
</tr>
<tr>
<td>Transcript Segment Name</td>
<td>sn=</td>
<td>(sn = Basic Building Blocks)</td>
</tr>
<tr>
<td>Speaker</td>
<td>sp=</td>
<td>sp=Weise or (sp = Steven Weise)</td>
</tr>
</tbody>
</table>
**All Content**

All Content searches across everything in PLI Discover PLUS, including all Treatises, Course Handbooks, Answer Books, Forms, and Transcripts. Search across All Content using Terms & Connectors or Natural Language.

**Advanced Search Options for All Content**

There are several fields that can be used to narrow a search, either in conjunction with the main search box or alone. The fields are as follows:

- **Title**: Use this field to search for a particular Book title, Form name, or Program title. Enter the title or keywords from the title.

  Example: “Mutual Funds”

- **Practice Area**: PLI designates at least one practice area for all of its titles. Use the Practice Area drop-down menu to limit your search to items in a specific practice area or practice areas.

- **PLI Item #**: Each PLI book, form, and program is assigned a searchable item number
Search Results Page

1. **Search Bar**
   The search bar displays the search. You can edit the search from here.

2. **Manage Your Search Results**
   (Email, Print, Add to Bookshelf)
   Next to each search result is a check box. Check the box(es) to select one or more results. You can email, print, or add your selection(s) to My Bookshelf using the appropriate icons.

3. **Save Search**
   Click on the Save Search icon to save your search permanently. Saved searches can be retrieved by clicking on My History then Search History in the resulting subtab.

4. **Permalink**
   Click on the Permalink icon to open the link. Copy and paste the link for your use.

5. **Refine Your Search**
   Narrow the results list by using the Search Within Result box or by selecting the filters in the Refine Your Search panel.

6. **Filters**
   The filters that have been implemented will be listed. Remove any of the filters by clicking on the “x” adjacent to the filter.
**Browse**

By selecting the Browse tab in the main navigation bar, you can view all of PLI’s titles in alphabetical order. In Browse, Books are listed at the book level and Transcripts are listed at the program level.

You can email, print, add to bookshelves, save the search, or extract the permalink from Browse. The save search feature is applicable if you search across multiple books or add facets. Searches will be saved under My History→Search History→Saved Searches.

The Jump To box allows you to jump to a book, form or transcript.
Inside a Book
After opening a Book from the Browse list, you will see the table of contents page. From here, you can search within the book or select individual chapters to search across. Additional Tabs inside a book are Book Overview, Update Info, Author Bio and Related Items. The Related Items tab lists related books, forms and transcripts. Bookshelf and Notes & Marks icons are visible next to chapter titles. Clicking on the Notes & Marks icon will produce a notation overview.
Inside Notes & Marks
Clicking on the Notes & Marks icon will produce a notation overview. If you have highlighted text that contains a footnote, then the footnote will appear in brackets after an asterisk. The notation overview will allow you to:

1) Edit any notes
2) Jump to the note, bookmark or highlight in the chapter or segment
3) Delete any notes, bookmarks or highlights
4) Email the contents of the notation overview
5) Print the contents of the notation overview
Inside a Chapter
Chapter pages may be navigated to from table of contents or Search Results pages, and contain chapter citation information and chapter content. You can search with the chapter via the search box in the upper left. The book’s table of contents can be accessed from the chapter page by clicking on the book title at the top of the page, or opening the table of contents slide out by clicking the table of contents icon on the grey toolbar. Click the grey toolbar’s Notes & Marks icon to view all notes, bookmarks and/or highlights that have been placed within the chapter. Additional management icons found on the grey toolbar include Download to PDF, Email, Print, Add to Bookshelf, Permalink, and Bookmark.

The Circular 230 Deskbook:
Defence: When the Court Must Yield to the Government’s Interpretation
Author(s): Damien Rios, Jonathan G. Blattmachr, Mitchell N. Gans
Practice Area: Tax
Published: 2016 Supplement Date: Sep 2013
PLI Item #: 9134

Chapter 1
Defence: When the Court Must Yield to the Government’s Interpretation

§ 1: 1
§ 1: 1.1
§ 1: 2
§ 1: 3
§ 1: 3.1
§ 1: 3.2
§ 1: 4
Introduction
Legislative Regulations
Chevron Defence
Skidmore Defence
Revenue Rulings
Interpretive Regulations:
Skidmore or
Chevron?
Auer Defence
Inside a Form

After opening up a Form from the Browse list, you will see the complete form record. The form is in rich-text-format and can be downloaded into Microsoft Word or any other text viewer. Official forms are in pdf format. The form is tagged with hyper-linked keywords. If the form is saved to a bookshelf, an icon will appear on the top right hand corner. Click on the icon to view which bookshelf the form is saved.
Inside a Program Transcript

Transcript table of contents pages display a listing of the individual program segments. From here, you can search within the program or select individual segments to search across. Additional Tabs inside a Program Transcript are Speaker Bio and Related Items. The Related Items tab lists related course handbooks and transcripts. If the transcript is saved to a bookshelf, an icon will appear on the top right hand corner. Click on the icon to indicate on which bookshelf the transcript is saved. If any notes, bookmarks or highlights have been added to the transcript and/or transcript segment, an icon will appear on the top right hand corner and by clicking on the Notes & Marks icon notation overview will be produced. These icons will also appear next to the segment title if that has been saved on a bookshelf or if a note, bookmark and/or highlight was made at the segment level.
Inside a Program Transcript Segment

After opening up a Transcript Segment from the table of contents or Search Results page, you view the segment citation information which includes the date the program was recorded on, along with the transcribed segment. In segment view you can search within the document. The table of contents can be accessed in the segment level by clicking on the Transcript title. Also on the grey toolbar is a Notes & Marks icon. By clicking on this icon you can view any notes, bookmarks and/or highlights made to this specific segment. Additional management tools are found on the grey toolbar including: Download to PDF; Email; Print; Add to Bookshelf; Permalink; and Bookmark.
My Bookshelf

In My Bookshelf, you can view the documents you previously added to a shelf. Shelf titles are limited to 50 characters and are listed alphabetically. You can create new, rename and delete shelves. To create a shelf, simply click on “Create New Shelf”. To rename or delete, click on the shelf followed by the drop down icon to the right of the shelf title.

Manage your Bookshelves with the following functionalities:

1. **Move** documents from one shelf to the next. Select document(s) to be moved, click on the Move icon, and a pop-up will appear listing the other shelves you can move the document(s) to.

2. **Delete** documents from your bookshelves. Select document(s) to be deleted, click on the Delete icon, and a pop-up will appear confirming that you want to delete selected document(s).

3. **Email** citations and links to the document(s) on a shelf by clicking on the Email icon. Separate email addresses with a semicolon.

4. **Print** the list of documents on your bookshelf, including the citations, by clicking on the Print icon. A list of the document(s), along with the citations, can be printed by checking the boxes adjacent to the documents(s).

5. **Sort** by to change the order of items in your bookshelves.

6. **Search** helps you quickly find a document.

Notes & Marks will be listed in a column on My Bookshelf. For further details and an image of the notation overview please see page 13.
My History

My History contains three sub-tabs: Search History, Viewing History and Notes & Marks

Search History

Search History has two components: Recent Searches and Saved Searches.

Recent Searches is a history of your searches. This is not permanent and the searches will expire unless saved.

To save a search, select desired searches and click on the disk icon.
My History

Saved Searches stores the searches you saved, either from the results list, or from Search History. Saved searches will be stored until you remove them. View search information by clicking on the drill down icon next to the query link – search information will list filters used including dating range and format type.

**Search Across Searches:** Search across all your searches by using the search box located on the top left corner of the screen.

**Delete Searches:** Delete the search by selecting the desired search(es) and then clicking on the trash can icon.

**Email:** Email a list of links to the searches to one or more person(s) selecting the desired search(es) and then clicking on the Email icon. Separate email addresses with a semicolon.

**Show Filters:** View your search filters by clicking on the filters icon next to your search. Filters will show any facets you used and the format you’re searching i.e. books, forms, and transcripts, as well as the date range.
Viewing History

Viewing History contains up to 100 of your recently browsed items and lists items at the chapter and segment level. Using the options on the left, you can review your Viewing History from “Today”, “Yesterday”, “Last 7 days”, “This month” or previous months. Viewing History displays chronologically by default, and can be sorted alphabetically by selecting the arrows beside the “Title” column header.

The title of the chapters and segments are hyperlinked, and will bring you directly to that chapter or segment. The Bookshelf and Notes & Marks icons will appear to the right of the chapter and segment title which allows you to view your bookshelf, notes, bookmarks and/or highlights.
**Notes & Marks**

*Notes & Marks* contains: Notes, Bookmarks, Highlights and Displaced Notes & Marks. These are also at the chapter and segment level.

By clicking on the linked notation, you will be brought directly to that note, bookmark and/or highlight. To expand and view the notation, click on the plus button next to the notation.

The chapter/transcript segment title is also hyperlinked. By clicking on the title you will be brought to the chapter/segment. To expand and view the full citation, click on the plus button next to the title.

Displaced Notes & Marks contains your notes from supplemented materials. When a book is supplemented and we are unable to re-apply the notes, bookmarks and highlights, they become displaced. However, this section of Notes & Marks allows you to always have these notes, bookmarks and highlights accessible.
Practising Law Institute
1177 Avenue of the Americas, New York, NY 10036

Contact Info:
PLI Library Relations
discoverplus@pli.edu
(877) 900-5291