THE ULTIMATE CORPORATE COUNSEL GUIDE

Quick Reference Card

In-house counsel’s single source to guidance on a wide-range of legal topics

Developed in conjunction with the Canadian Corporate Counsel Association (CCCA)

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What is the Ultimate Corporate Counsel Guide?

- The **Ultimate Corporate Counsel Guide** is a practical reference tool for in-house counsel.
- It offers practical advice and solutions for a wide range of compliance-based topics in-house counsel faces every day.
- The content and strategy of this manual is based on feedback received from Canadian Corporate Counsel Association (CCCA) members.

Subtopics include the following types of information:

- **Overview** – key information at a glance. Includes brief explanations of key terms, and a summary of legislative requirements as applicable.
- **Practical Application** – valuable commentary including a more detailed explanation of key terms and processes. Illustrated by examples, brief case studies, case law and legislation, if appropriate.
- **Precedents/Practical Tools** – includes selected precedents and practical tools, such as sample forms and letters, policies, agreements, checklists, charts plus more.
- **Case Law/Legislation** – includes selected case summaries/significant decisions and reference to significant legislation (as applicable).
- **Further Information** – provides links to useful sources of further information (i.e. government organizations, professional associations, publications).

Advantages of the Ultimate Corporate Counsel Guide

The **Ultimate Corporate Counsel Guide** provides the following advantages.

- **Practical information** – what to do and how to do it.
- **Practical tools** – help save time and audit existing practices and procedures.
- **Charts and Tables** – provide key facts at a glance.
- **Links to related documents** – documents referred to within the text can be immediately linked to with simple point and click options.
- **Frequent Updates** – the internet version of the **Ultimate Corporate Counsel Guide** is updated as changes occur.
- **Monthly Newsletters** – provide feature articles reviewing recent legal issues, trends and new developments.
- **Easy-to-use Search Options** – a number of search options make searching easy and accurate.
- **Industry-Leading Contributors** – over 50 lawyers, expert authors and CCH editors have collaborated efforts to bring you the superior content in the **Ultimate Corporate Counsel Guide**.

Topics in the **Ultimate Corporate Counsel Guide** are divided into 24 key sections.

- Each section includes a wide range of topics, featuring over 63 key topic areas.
- Each topic includes various subtopics, with over 250 subtopics included to date.
The **Ultimate Corporate Counsel Guide**’s Internet Interface

1. **Menu and Toolbars** – Use these options to navigate through the **Ultimate Corporate Counsel Guide**.
2. **Table of Contents** – Use these folders to browse the content in the **Ultimate Corporate Counsel Guide**.
3. **Viewing Area** – This is the main viewing area of the site. Documents, Search Results, Search Forms, and selector screens are displayed here.

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A Go to Favourite search form  
B View/Modify last search form used  
C Show/Hide number of hits in the Table of Contents  
D View the current document  
E View the search results list  
F View both current document and search results list - split screen  
G Hide/Show Table of Contents  
H View previous document in Table of Contents  
I View next document in Table of Contents  
J View previously highlighted hit in the current document  
K View next highlighted hit in the current document  
L View previous document in the search results list  
M View next document in the search results list  
N Clear highlighting of hits  
O Email current document  
P Add current document to Briefcase  
Q Add a note to the current document  
R Save current document/results list  
S Print current document/results list  
T Open help system
Accessing Information in the Ultimate Corporate Counsel Guide

There are a number of ways to access the valuable information found in the Ultimate Corporate Counsel Guide. Options include:

1. Drilling through the Table of Contents.
2. Conducting a search.

Drilling through the Table of Contents

The Ultimate Corporate Counsel Guide is found in the Legal Library in the Table of Contents. The Table of Contents appears on the right side of the screen. To access the information in the Ultimate Corporate Counsel Guide via the Table of Contents:

1. Click the “+” sign to expand the titles under the Ultimate Corporate Counsel Guide.
2. Click the Title of the document you want to view.

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2. Click the Title of the document you want to view.

In business, as in life, one size does not fit all. The same is true of corporate legal departments. Each legal department — like each company and each CEO — is unique.

Your company’s business drivers will determine the structure and size of your legal department. These drivers, such as your company’s industry (whether or not highly regulated), its workforce (whether or not unionized), and its hierarchical organization (whether or not directed by parent companies) will dictate, in large part, the composition of your department as well.

Whether you’re an O&O (only legal officer) or a CLO (chief legal officer), it is your responsibility as the leader and manager of your legal department to ensure that your company’s drivers have been considered in establishing and maintaining your legal department. This is key to your success and to the success of your department and its staff.

Add to the mix your personality and that of your CEO, and the result should be the right legal department for your company.
Conducting a Search

Find what you are looking for quickly and easily by using the Ultimate Corporate Counsel Guide's Topic Search Form. The Ultimate Corporate Counsel Guide search form can be accessed via the Search Menu.

1. From the Search menu, select CCH Legal Topic Search
2. Select Ultimate Corporate Counsel Guide

The Ultimate Corporate Counsel Guide's Topic Search Form offers two search methods – Boolean and Assisted Boolean. Assisted Boolean provides a simplified way to access the information in the Ultimate Corporate Counsel Guide.

To conduct an Assisted Boolean Search:
1. In the Ultimate Corporate Counsel Guide Topic Search form, click Assisted Boolean Search.
2. Use Boolean Expanders (noted in chart below) to generate alternates for terms.
3. Use the drop-down options provided to create the desired relationship between terms.
4. Use the check boxes in the Restrict Search and Additional Search Restrictions sections to restrict the search to specific categories and document types.
5. Click Search.

### BOOLEAN EXPANDERS

<table>
<thead>
<tr>
<th>Operator Description</th>
<th>Symbol</th>
<th>Example</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple Character Wildcard</td>
<td>*</td>
<td>deduct*</td>
<td>deduct, deducted, deductible</td>
</tr>
<tr>
<td>Single Character Wildcard</td>
<td>?</td>
<td>licen?e</td>
<td>licence, license</td>
</tr>
<tr>
<td>Stemming (word form)</td>
<td>%</td>
<td>pay%</td>
<td>pay, paying, paid</td>
</tr>
<tr>
<td>Synonym</td>
<td>$</td>
<td>income$</td>
<td>income, pay, salary, wages</td>
</tr>
</tbody>
</table>

Note: for details on Boolean Searching, please refer to the CCH Online Quick Reference Card.
Reviewing Search Results

All documents matching your search criteria appear in the Search Results List.

1. To view a document listed in the Search Results, click the document title.

2. To navigate while viewing a document:
   i. View next/previous document in the Table of Contents.
   ii. View next/previous highlighted hit in the current document.
   iii. View next/previous document in the Search Results list.

3. To switch between views:
   i. View last search form used.
   ii. View current document.
   iii. View Search Results list.
   iv. View both current document and Search Results.

Hide/Show Table of Contents.

Note: A flashing red arrow indicates that the search terms appear in a folder or footnote. Expand the folder or footnote and review.
Saving, Printing, Emailing, Storing and Annotating Documents

To save a document:
1. Open (view) the document you want to save.
2. Click the Save icon on the toolbar.
   The Save Options page may appear depending on the document type being saved. HTML documents can be saved in their original format or converted to Rich Text Format (RTF).
3. Check the options you want, then click Save.

Note: To save more than one document at a time you must select Save Selected Document from the Documents menu.

To print a document:
1. Open (view) the document you want to print.
2. Click the Print icon on the toolbar. The Print Options page may appear depending on the document type being printed. For HTML documents you have the option to exclude related matter and history.
3. Check the options you want, then click Print.
4. The browser’s Print dialogue box appears. Check any required options, then click Print.

Note: To print more than one document at a time you must select Print Selected Documents from the Document menu.

To email a document:
1. Open (view) the document you want to email.
2. Click the Email icon on the toolbar.
3. In the To field, type the recipient’s email address.
4. In the Note field, type any comments you’d like to send with the document (optional).
5. Click Send.

To add a document to your Briefcase:
1. Open (view) the document you want to add to your Briefcase.
2. Click the Briefcase icon on the toolbar. A page containing the document title appears.
3. Click the Add button.

To view the contents of your Briefcase:
1. From the Tools menu, select Manage Briefcase.
2. Click a document to view it or check the documents you want to manage and select a command to execute.

To add a note to a document:
1. While viewing a document, click the Notes icon in the toolbar.
2. A window opens. Type your note in the empty space provided.
3. Click the Save button.
4. The note appears at the bottom of the document page as represented by the Notes icon.
5. Click the Note icon to open it.
6. Click the Manage button to edit, print or delete saved notes.
Online Resources

Training web site Training requests
http://www.training.cch.ca training@cch.ca

CCH Online Getting Started Guide Technical Support
http://www.cchonline.ca/menushelp/GettingStartedGuide.pdf support@cch.ca

CCH Online Administrator’s Guide Feedback
http://www.cchonline.ca/menushelp/AdminGuide.pdf onlinefeedback@cch.ca

CCH Online Quick Reference Card updates
http://www.cchonline.ca/menushelp/QRC.pdf

CCH Canadian Limited

90 Sheppard Avenue East web: http://www.cch.ca
Suite 300, Toronto, ON email: info@cch.ca
M2N 6X1

Customer Service
Toll-free Customer Service (Canada and USA) 1.800.268.4522
Customer Service (Toronto) 416.224.2248
cservice@cch.ca

Technical Support
Toll-tree Technical Support (Canada and USA) 1.800.263.4983
Technical Support (Toronto) 416.250.8324

Important Information

Your CCH Account Number: _____________________________________________

Your User Name: ______________________________________________________

Your CCH Online Profile Name: __________________________________________

Your Password: _______________________________________________________

Your CCH Profile Password: ____________________________________________

CCH Canadian Limited

90 Sheppard Avenue East web: http://www.cch.ca
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Customer Service
Toll-free Customer Service (Canada and USA) 1.800.268.4522
Customer Service (Toronto) 416.224.2248
cservice@cch.ca

Technical Support
Toll-tree Technical Support (Canada and USA) 1.800.263.4983
Technical Support (Toronto) 416.250.8324

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