

Practitioner Onboarding: Getting Started

Logging In

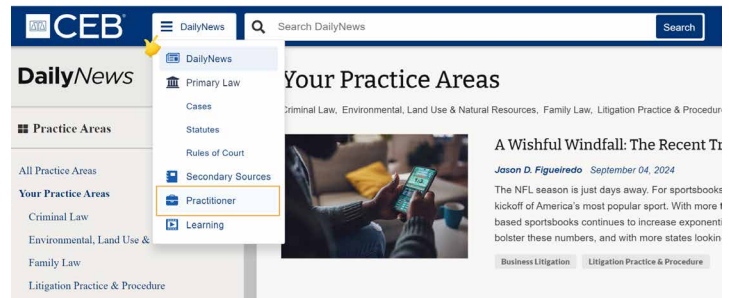

[Log In](#)

1. Visit <https://research.ceb.com/login/> to login.
[Watch the video.](#)
2. Enter your username and password and click Log In.

Log In

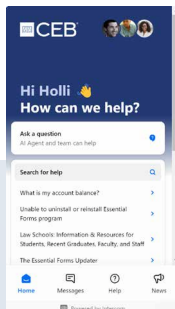
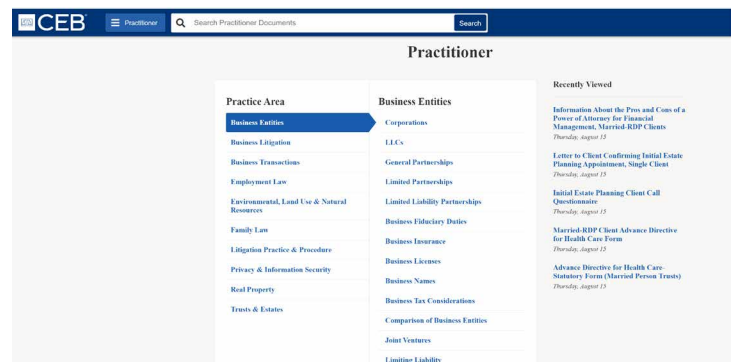
Getting to Practitioner™

3. Once logged in, click on the 3 lines and select Practitioner.



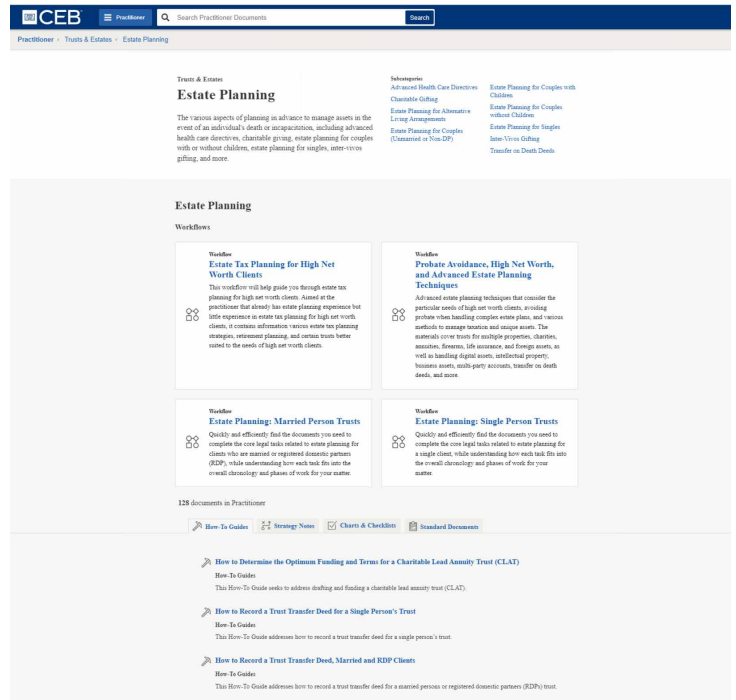
Using Practitioner

4. From the Practitioner main page, search using key terms or browse through by practice area and sub-category. [Watch the video.](#)



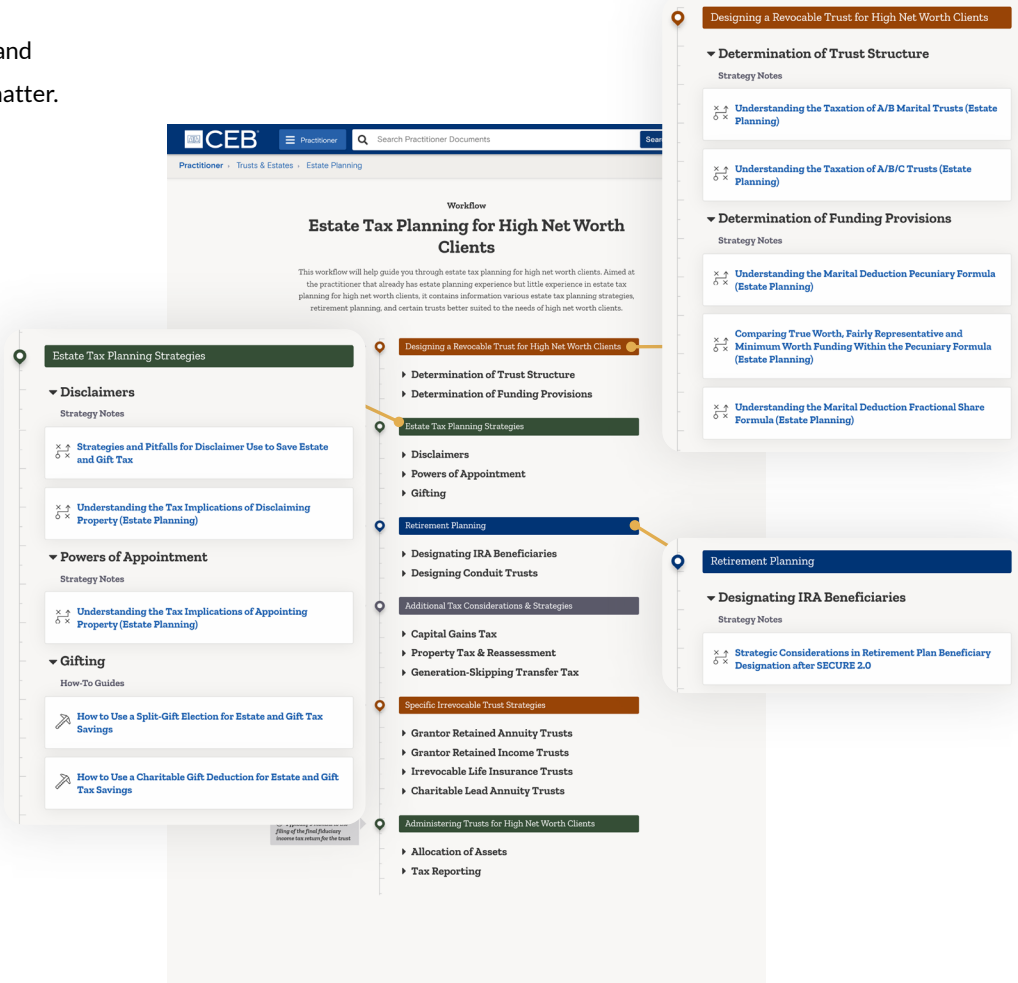
If you have questions while using Practitioner, click on the chat icon in the bottom right of the screen. You can speak with an agent by putting your question in the “Ask a question” box or do your own search in the gray “Search for help” box.

- From there, you can start using Practitioner's **Workflows, How-To Guides, Strategy Notes, Charts & Checklists and Standard Documents.**



Workflows

Review a comprehensive roadmap and timeline for the entirety of a legal matter.



How-To Guides

Streamline your legal process with clear, concise, step-by-step guidance, including Judge's perspective, practice notes, cautions, and examples.

The screenshot shows a document titled "How to Determine the Optimum Funding and Terms for a Charitable Lead Annuity Trust (CLAT)" by Richard R. Shu, dated February 15, 2024. The document includes a table of contents on the left with sections like "Step 1: Review the Background on CLATs", "Step 2: Determine Whether a Grantor or Non-Grantor CLAT is Preferable", etc. The main content starts with a "Summary" section stating the guide's purpose and a "Step 1: Review the Background on CLATs" section with a sub-section "A. Purpose" defining a CLAT.

Strategy Notes

Leverage insights from seasoned attorneys and judges with outlines of the key strategic and tactical considerations for analyzing new developments, approaching settlement negotiations, or advising your client.

The screenshot shows a document titled "Understanding the Advantages and Disadvantages of Transfer on Death Deeds" by CEB, dated December 29, 2024. It includes a "Summary" section and an "Introduction" section defining a revocable TOD deed as an instrument that makes a donative transfer of real property to a named beneficiary upon the transferor's death.

Charts & Checklists

Quickly reference processes with flowcharts and review key tasks and outlines of statutes of limitations, relevant jury instructions, and more.

The screenshot shows a document titled "Checklist of Items to Check Prior to Transmitting Drafts to Client, Married or RPP Settlers" by Leah Larkin, dated May 12, 2023. It includes a "Summary" section and a "I. General Form and Content Items - All Documents" section with a checklist of items to verify, such as "Check pagination of all documents for accuracy" and "Check any cross-references between documents".

Sample Documents

Draft unfamiliar motions using downloadable, high-quality templates, forms, and standard clauses with annotated sample documents from experienced California lawyers.

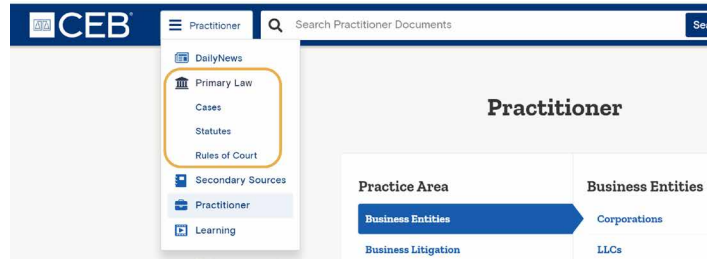
The screenshot shows a document titled "Information About the Pros and Cons of a Power of Attorney for Financial Management, Marriage" by Matthew D. Klein, dated May 26, 2023. It includes a "Summary" section and a "1. Power of Attorney for Financial Management" section defining the term and its legal implications under California law.

Using CEB Primary Law & Secondary Sources

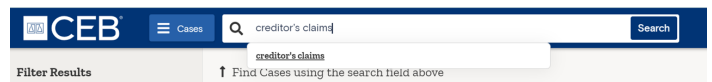
Primary Law

- To use CEB's Primary Law, click on the 3 lines and select Cases, Statutes, or Rules of Court.

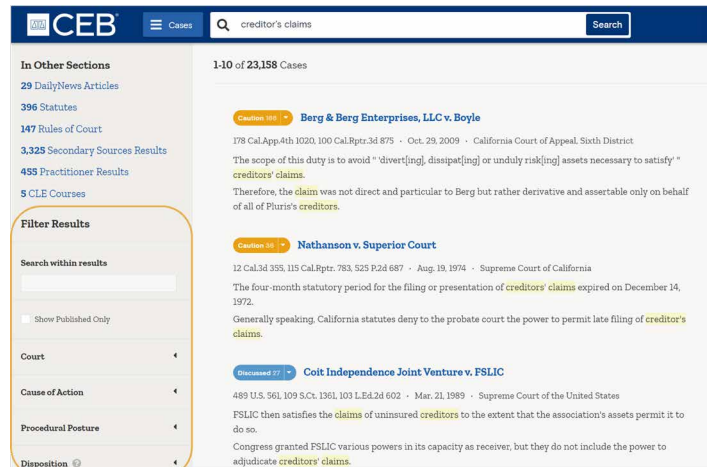
Watch the video.



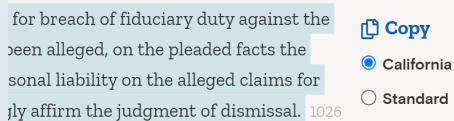
- Enter your search term(s) in the search bar.



- Use Filters to narrow your search. CEB's TrueCite® case citator flags will help you identify the most useful cases using color-coded flags.



Once you've found a statute or case law you want to use in your brief or other document, you can **copy with cite** by highlighting the text you want to copy and choosing between California style or Standard Bluebook style. When you paste the text into your document, the correct citation format will appear with the copied text.



Definition

- Negative** Indicates the case is no longer good on at least one point of law (e.g., disapproved, overruled, superseded, disavowed, or some other directly negative treatment.)
- Warning** A subsequent case disputed the cited case's precedential value (e.g., criticized, limited, disagreed with, declined to extend, declined to follow, validity questioned.)
- Caution** Indicates the case is good law, but is not binding due to different facts (e.g., distinguished, cited for contrast, not applicable.)
- Neutral** Indicates the case is being cited or discussed for background legal principles or context; may also indicate more positive treatment, like upholding the case or relying on it.
- No Treatment** Case has no citator treatment; either it is a new case or no subsequent cases have referenced it yet.

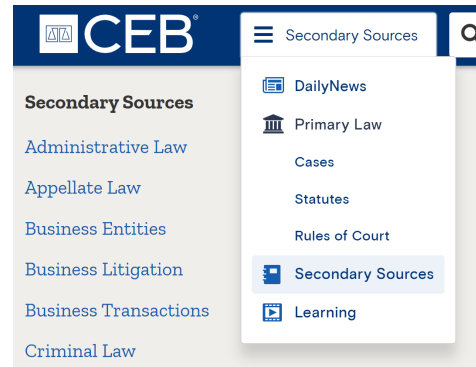
Treatment Text

- Abrogated by other case; Abrogated by Statute; Disapproved; Disapproved by other Case; Disavowed; Overruled; Overruled by other Case; Reversed; Reversed by other Case; Reviewed granted, Superseded by Constitutional Amendment; Superseded by Statute; Vacated; Vacated by other Case
- Codified by Statute; Criticized; Criticized by other Case; Declined to Extend; Declined to Extend by other Case; Declined to Follow; Declined to Follow by other Case; Disagreed; Limited; Limited by other Case; Validity Questioned
- Distinguish; Distinguished by other Case; Not Apply; Cited for Contrast
- Discussed; Cited; Cited in Concurrence; Cited in Dissent; Cited in Secondary Opinion
- New; Not Cited

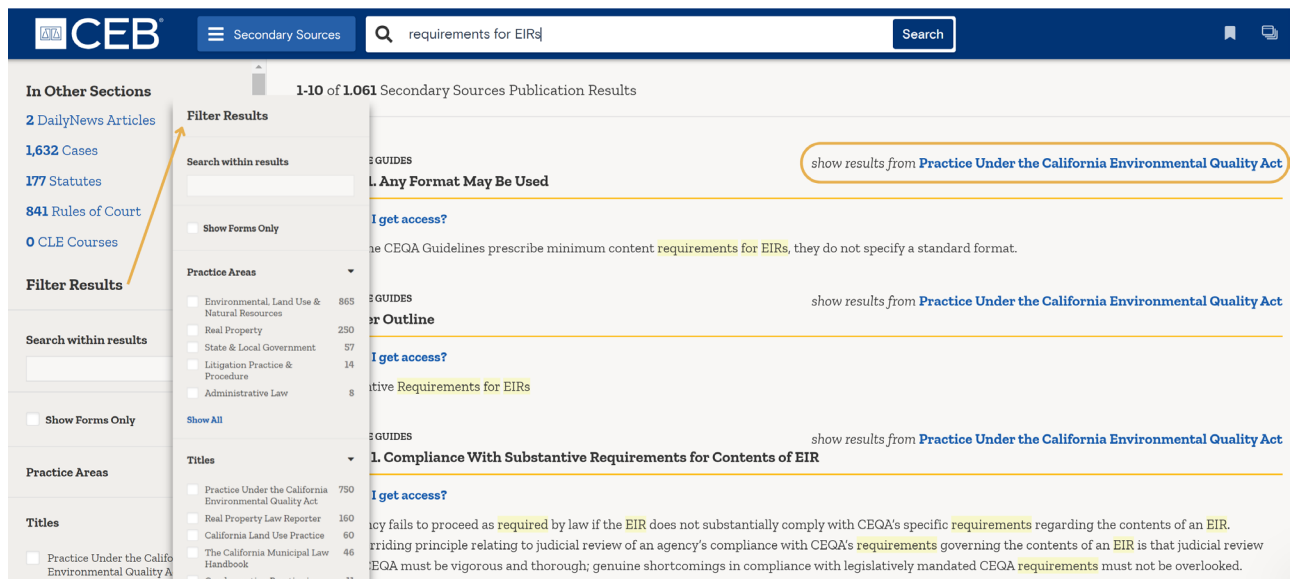
Secondary Law

1. Use CEB's practice guides by clicking on the 3 lines and selecting Secondary Sources.

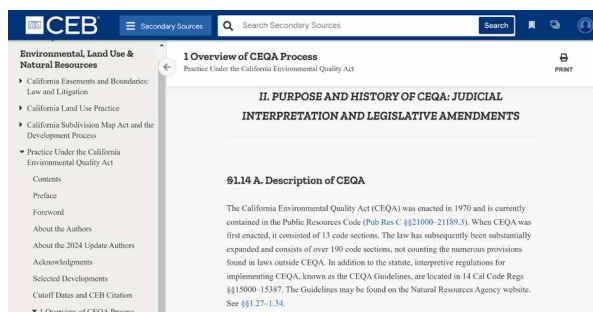
Watch the video.



2. (a) Filter your search by searching within the results, or by practice area, titles, or resource type.



- (b) Or, choose the appropriate area of law on the left side.



Click here to explore all of the Practitioner onboarding videos.