Perspective

In Brief **User Guide**
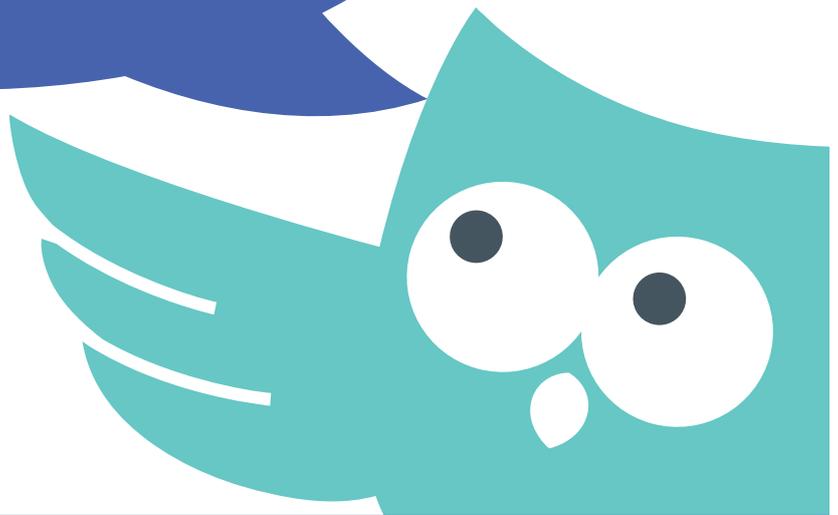
Logging in to Perspective

Open **https://perspective.info** in your browser.

Click Log in.

Enter your email address and password.

If you have forgotten your password, click "Forgot password?" or contact the Pendragon helpdesk.

Click the cog on the far right of the button bar to access **User Preferences** and **Account Settings.**

On the User Preferences page, you can change font size and access contextual help options. If you select **Show contextual help**, a brief description will appear whenever you hover over a button in the button bar.

On the Account Settings page, you can update your name and email address, and sign up to the **News and Document Alert emails**. You can then select the frequency of the emails and News topics covered.

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Opening a Document

Click a document title to open it in the current tab or "Ctrl-click" to open it in a new tab.

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Table of Documents	**Table of Documents** is available in the button bar at the top of the screen or on the Home Page. Documents are listed by family. To open a specific document, click the family and find the document title.

Open Document incorporates the **Document Finder** and **Recently Opened Documents**.

Select a document from the list of Recently Opened Documents - the last 20 documents you have opened. Recently Opened Documents is also available on the Home Page.

Alternatively, start typing an abbreviation or any part of a document title in the Document Finder box. A list of documents will be offered. The document type (Act, SI, Regulatory, etc) is listed in the column to the right.

disclosure		Reset

Abbreviation	Document title	Family
disclosure	SI 2013/2734 The Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013	SI
disclosure spi	SI 2000/3188 The Social Security (Disclosure of State Pension Information) Regulations 2000	SI
disclosure 96	SI 1996/1655 The Occupational Pension Schemes (Disclosure of Information) Regulations 1996 (revoked)	SI
disclosure 87	SI 1987/1110 The Personal Pension Schemes (Disclosure of Information) Regulations 1987 (revoked)	SI
code disclosure	Miscellaneous	Pension Fund Disclosure Code	Regulatory
	SI 2019/982 The Occupational Pension Schemes (Investment and Disclosure) (Amendment) Regulations 2019	SI
	SI 2018/988 The Pension Protection Fund (Pensionable Service) and Occupational Pension Schemes (Investment and Disclosure) (Amendment and Modification) Regulations 2018	SI
	SI 2018/233 The Occupational Pension Schemes (Administration and Disclosure) (Amendment) Regulations 2018	SI
	SI 2015/482 The Occupational and Personal Pension Schemes (Disclosure of Information) (Amendment) Regulations 2015	SI
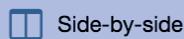
The **Side-by-side** view can be used to look at two documents in the same tab.

Side-by-side can be activated from a pop-up window, splitting the main window between the document already open in the main window and the document in the pop-up window.

You can also click Side-by-side in the button bar to split the window into two. If you have a document open, it will automatically open in the left pane. You can then choose documents to view on the other side, either from your list of Recent Documents, or by using Table of Documents or Open Document.

Favourites

Social Security Contributions and Benefits Act 1992

Sort By:	My order	By name	By family

Name	Family	Actions
Section 303 in Pensions Act 2004	Acts	✏ 🗑
Section 35 in Pensions Act 2008	Acts	✏ 🗑
SI 2010/5 The Employers' Duties (Registration and Compliance) Regulations 2010	SIs	✏ 🗑

To create a **Favourite** to a document, click the star next to the document title.

To create a Favourite to a specific provision, click the ⭐ to the right of the text.

You can edit the name of the Favourite to your preference, and also choose the "Include the Date and View information" option to save the document's time travel information.

You can then access your list of favourites by clicking the Favourites button in the button bar. From this list, you can delete any favourites you no longer need.

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Navigating a Document

Location Tools

The easiest way to navigate to a particular place in a document is to use the **Location Tools** in the button bar.

Select Schedule/Part/Section etc, type the required location number into the blank box, and press return or click the arrow button.

Alternatively, you can expand levels in the **Table of Contents**, on the left side of the Main Window, by clicking the right-facing arrows.

Table of Contents

Notes to Documents

The **Notes** buttons are located to the left of the text. Click the appropriate button to open the Notes window.

🏷 A tag indicates there are notes to the specific provision.

🚩 A red flag indicates the provision is subject to modification.

H An H indicates there are notes to the whole document.

Types of Notes

|	
• Commencement	When the provision comes into force and what brings it into force.
• Amendments	Lists all amendments, when they come into force and what brings them into force.
• Derivation/Destinations	Where the provision originated/where it is now.
• Modifications etc	Lists modification and transitional information relevant to the provision.
• Orders and Regulations	Lists statutory instruments that are made under the enabling power of the provision.
• Cases	Links to cases that discuss the provision in detail.

Printing
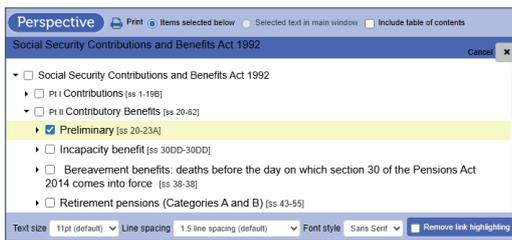
To **print** from Perspective, either:

• highlight text in the Main Window and click the print button in the button bar; or

• click the print button, choose the "Items selected below" radio button and use the tick boxes to select specific sections, Chapters, Parts etc.

You can print the associated Table of Contents by checking the option at the top of the window. You can also change text size, line spacing and font style as well as choose to remove link highlighting at the bottom of the window.

Note: If you are using time travel, be sure to print in colour.

Creating a Link to Perspective
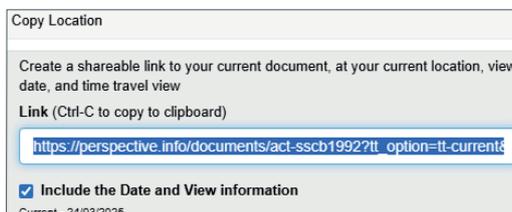
To create a link to a specific location on Perspective, use the Location Tools or Table of Contents to navigate to a provision, then click **Copy Location** in the button bar. This will open a box with a unique location url.

To copy the url, press "Ctrl-C" on the keyboard. The url can be pasted into other documents as well as emails.

Check the "Include Date and View Information" box to include time travel information in the link.

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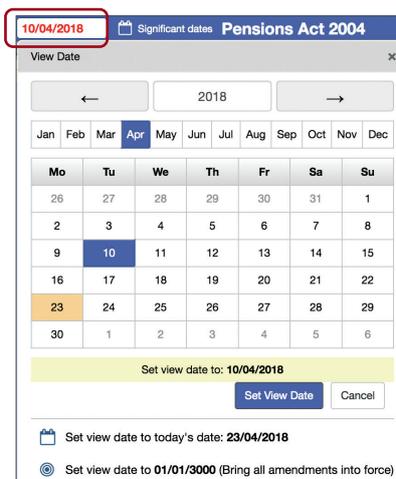
Time Travel

Many documents on Perspective **Time Travel**, allowing you to view the text on any date in the past, present or future.

Changing the View Date

To view a document at a particular date, click the View Date box in the top left corner of the main window, and either:

- type in the date and **hit the return key**, or
- use the Calendar to select the date and click **Set View Date**.

Use the buttons at the bottom of the Calendar to set the View Date to:
- **today's date**, ie the date at which you are accessing the document, or
- **01/01/3000**, in order to see all amendments that do not have an appointed day for coming into force.

Note: When the date in the View Date box is not today's date, the colour of the date will be red instead of black.

Significant Dates

The **Significant Dates** button is located to the right of the View Date box.

Clicking the button reveals a list of dates that are relevant to the provision in view.

The dates in the list will change as you scroll through the document, showing the relevant dates for each provision.

Clicking a date from the list will change the date in the View Date box.

Significant dates is best used in conjunction with the On This Day view (see "View Tabs").
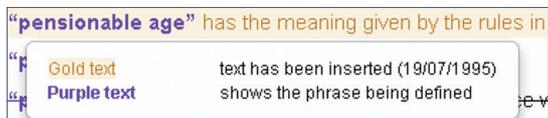
View Tabs
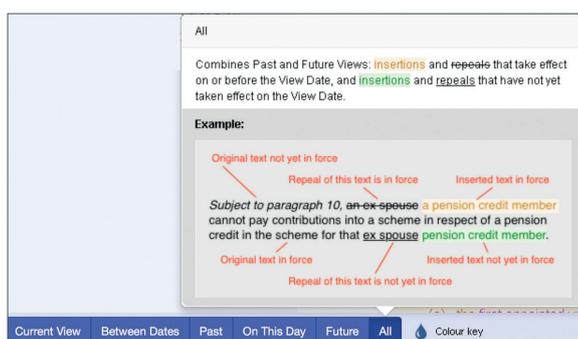
Perspective offers six **View Tabs**, which help you identify and understand amendments to a document. These can be found at the bottom left of the window.

Clicking the View Tabs reveals colour coding that highlights amendments that have been made, or are going to be made, to a document.

The available View Tabs are: Current View, Between Dates, Past, On This Day, Future and All.

A description of the views can be found by enabling the Contextual Help settings in User Preferences (see "Logging in to Perspective") and hovering over the relevant View Tab.

Colour Key

The **Colour Key** provides a description of the relevant colour coding whenever you hover over text in a document.

To turn the Colour Key on/off, click the button to the right of the View tabs in the bottom left of the window.

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Searching

To access the Search Window, click 🔍 Search in the button bar. Click the question mark ⑦ on the top right corner of the Search Window to access Search Help, which contains information on how to run a search and tips for better results.

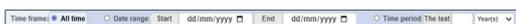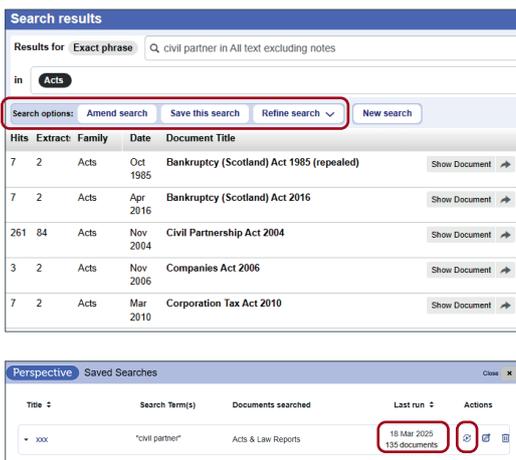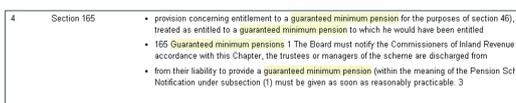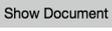|	
Step 1: Search Term(s) panel	**Step 1: Search Term(s)** – enter the words or phrases you want to search. You can then choose whether you want to search the exact phrase, any of the terms or all terms within the same 'section'. • A term is either a "phrase in quotes" or a word • Plurals of terms are automatically searched, e.g. searching for "actuary" would find both "actuary" and "actuaries".
Step 2: Document Selection panel	**Step 2: Document Selection** – select the documents you want to search within: • Add Current Document: adds the document you have open • Open Document: type in the title of a document, or select from your Recent Documents (the last 20 documents you had opened) • Table of Documents: select whole collections, or click into the collections to select individual documents. You can then select your Search Extent: • All text including/ excluding notes: this refers to Perspective notes, e.g. commencement and amendment notes • Titles and headings only: this includes document titles, as well as Part, Chapter, Schedule and section titles within a document.
Time frame panel	**Time frame** – you can also limit results within a specific date range or by a certain number of years, months or days.
Search results panel	Click the Search button to run the search. **Search results** will open in a new tab. Click a column title to sort the Search results. An arrow will appear next to the column being sorted. **Search options** • **Amend search**: takes you back to the Seach Window, from where you can change your search parameters • **Refine search**: search for term(s) within the documents in the list of Search results • **Save this search**: save your search to your list of **Saved Searches**, which you can access by clicking the **Saved Searches** button in the top right hand corner of the main Search Window. The **Saved Searches page** will show you the date you last ran the search and documents found, as well as allow you to easily re-run your search • **New search**: opens the Search Window, where you can run a new search.
Section 165 extract	To access the Search hits, click the document title. The hits are listed by location and are divided into extracts with contextual highlighting. To open a document, click an extract. **Note**: The text of the extracts does not time travel. To bypass the list of extracts, use Show Document or → to open a document in the same or a new tab respectively. To return to the full list of documents, click ← Back to Full Results When Search hits are in Law Reports or Ombudsman determinations, click ⓘ to view a selection of Keywords etc.
"GMP conversion" means amendment of the scheme guaranteed minimum pension rules,	Hits are highlighted in black in the document. There is also an arrow to the left of the text to indicate the location of a hit: ▶ Red arrows mean a hit is visible ▶ Faded arrows mean a hit is in hidden text eg text not yet in force or the Notes To navigate hits in the document, use the arrows in the button bar ‹ › To remove hit highlighting and arrows, untick ☑ Toggle search terms To return to the list of Extracts, click ← List search results
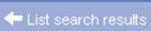
Annotations

Creating Annotations
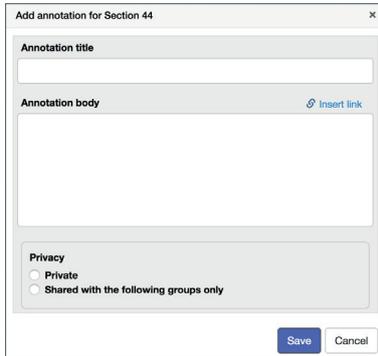
You can add your own notes to a document by clicking [icon] to the right of the text and creating an Annotation.

You can give the Annotation a title and write any additional information in the larger box.

You can create links to other websites by highlighting text and clicking "Insert link".

Using the radio buttons at the bottom of the window, you can choose whether to make your Annotation private or whether to share it with specific groups.

Click "Save" to create the Annotation.

Accessing Annotations

To access an Annotation, click the relevant speech bubble.

All annotations created by you or shared with you will appear as blue buttons.

You can create multiple Annotations per provision, which can be edited or deleted as you wish.

To access a list of all your Annotations, click the Annotations button in the button bar.

You can use the two drop down lists at the top of the Annotations window to filter the list. The first gives the choice of Current Document or All Documents. The second shows the groups the Annotations are shared with.

We'd love to hear from you

Call the Perspective Helpdesk 0800 980 1332
or email helpdesk@pendragon.co.uk

Alternatively, visit the Perspective Help Page [?]
where you will find links to our Training Videos.