

Taxnet Pro™ – Transcript

Getting Started

Welcome to the Taxnet Pro Getting Started tutorial.

To access Taxnet Pro, go to: v3.taxnetpro.com. Enter your OnePass username and password into the fields provided and select Sign In. You can save your sign in credential on your computer by selecting one of these two options.

The Client File page appears for those users who have enabled this feature. The Client File option tracks the research you do and the documents you view to a specific file that you create. Select a file, “None” being the default, and then select Continue.

Occasionally a Taxnet Pro information lightbox might appear to alert you to important developments. To view the information another time, select the Close button. To prevent it from displaying again, select the “Don’t show me this again” checkbox and then Close.

The Taxnet Pro Home page appears. At the top of the screen is the persistent header accessible on most pages throughout the site. It includes the Toolbar, Quick Search, your Active Folder and the Menu Bar. The Toolbar includes:

- Your recent documents and searches in History
- Folders, which allows you to access documents and text you have saved to folders that you’ve created (you can also access your active folder here)
- Options, which retrieves your Preferences page
- Help items
- A link to switch between the French and English interface
- The Logout link
- A Feedback link
- And Client File... where you can switch client files on the fly and set your preferences for displaying the client file option at log in.

In the search section of the Toolbar you can:

- Select the Recent Searches icon to display and run any of your last 20 searches.
- Enter your query into the Quick Search box to search the Taxnet Pro library or you can...
- Select the Query Builder and use pre-defined fields to build your search.
- To restrict your search to a specific document-type, select it from the All Documents drop-down list.
- At any point while in the Taxnet Pro service you can select the Taxnet Pro logo to return to the Home page.

Below the Toolbar is the Menu Bar. Here you can:

- Retrieve a search template or your saved searches alerts page
- Access the Table of Contents where you can either browse or search content
- Retrieve various TaxNews pages by document type or the full TaxNews page itself
- Retrieve the various Taxnet Pro practice-specific Centres... and...
- Find experts in the tax industry who regularly contribute to Taxnet Pro.

The Highlights section spotlights recently released tax documents and important news items and is updated throughout the day. Below Highlights is the Pinpoint Search section where you can, for example, quickly retrieve a government document by its unique number, a section of the Income Tax or Excise Tax Act or a case by name. Select an option from the drop-down list and enter the section number, document ID or case name into the field provided and select Search. Selecting the Pinpoint Search Help icon retrieves a chart showing the various types of government documents you can retrieve with Pinpoint searching along with an example from each.

Next to Pinpoint Search are links to two calculators and at the bottom of the page is where you are alerted of any new documents that have been found by searches you set up to auto run. Not only can you have them emailed to you, but they can also be highlighted here on the Home page.

Let's run a sample search using the Quick Search Query Builder. The All Results page appears displaying your hits in relevancy order, 50 documents at a time. Note that you can change the number of hits displayed in your preferences.

Options on the results list page include:

- The Next Page icon to navigate to the next set of hits, and
- The Sort By drop-down list to re-sort the list on the fly.

To switch between displaying all documents or only those documents that are included in your subscription, select the Show All Content/Subscribed Content icon. Select the Saved Searches icon if you want to save this search. Select the View Details icon to select from three levels of document details to display. You can save documents to a Taxnet Pro folder by selecting the documents using the checkboxes provided and then selecting the Save to Folder icon or dragging and dropping the documents to your active folder. To print, email or download your documents, select the Document Delivery icon.

On the left side, you can choose to view only those documents from a specific document category. Once you select a category, custom filters appear in the Narrow section below providing you with the option to further refine your results list. You can keyword search within the documents, and narrow by a number of other options such as Area of Interest, Government Document type, Date and so on.

A dollar sign or a Do Not icon next to a document in the results list indicate those documents that are outside your subscription plan. / Selecting a document with a dollar sign icon triggers a message stating that the document is available but only on a pay-per-view basis. The cost for viewing the document is shown in the message. If you select the View Document button, you will be charged for viewing this document and an invoice will be sent. Select the Cancel button to return to the results list without incurring an additional charge. /

Selecting a document with a Do Not icon next to it, displays an out-of-plan message stating that this document is only available for viewing by subscription. If you wish to view the document, please contact your account representative for more information. Select the Close button to return to the results list.

To retrieve a document, select its link. Primary search terms are indicated in yellow and secondary search terms are in purple. You can navigate through the document search terms by choosing either primary, secondary or both. Additionally, you can search for another word within the displayed document only. This term would appear in green. You can change your display options. You can also upload the document to the folder or print, email or download it. And... you can switch between full screen and split screen mode.

The eyeglasses icon indicates that you have previously viewed the document in the last 30 days for the current client ID. The folder icon indicates that you have saved the document to a folder, and a purple document link indicates that you viewed the document in the last 24 hours.

To copy a portion of text to your device's clipboard, select the text and then from the pop-up menu select Copy with Reference. You can then paste this text along with the document information into another document or email. To copy and paste multiple portions of text, select the text and then select the Save to active folder link. Continue the same procedure by saving additional text to the active folder. When ready, expand your active folder, using the checkboxes provided, select the text you want to copy and then select the Copy with Reference icon. The text you selected can now be pasted into another document.

On the left, you can switch between displaying your Results List and Table of Contents view.

Cross references for the current document displayed may be accessed by selecting the tabs at the top of the page. Select the document title link to get a preview of the document to see if it is relevant to you. From the preview window, you can then open the document or flag it. To open the document directly from the list, select the document icon. You can search the full text of the cross-referenced documents, using the Query Builder. Here is a breakdown of cross-references by category and you can restrict your list to display that category only. You can also see a breakdown by language. To return to your original document, select the Document tab.

To search using a custom search template, select the appropriate template you wish to search from the Search link located on the Main menu. Enter your search terms using the fields provided, choose a sort order, and then using the checkboxes provided, restrict your search to an area of interest or document type, if you wish. In some templates, additional search fields may also be provided. All templates have the option to restrict by document language outside of that which you have selected in your preferences. When ready, select Search. A note about searching: If you run your search using the Quick Search option at the top of the page and then restrict your search to a specific document-type all of the same options that appear in the custom search template also appear in the Narrow section of the results list. So, regardless of whether you choose to start with a search template or Quick Search, you can search with confidence knowing that all of the same filter options are available to you.

To browse the Taxnet Pro library, select the Table of Contents link located on the Main menu. From here, select the arrow next to a heading in order to expand it to the next level of detail. To retrieve the full text of a document, select its link. You can also search the Table of Contents by using the Quick Search box at the top of the screen. Your distribution of hits appear next to each heading. Expand the headings to see more details. From here you can select one or more documents and save them to a folder, or print, email or download them.

To view your folders, select its link located at the top of any page. While viewing a folder's contents, you can select items, and then copy or move them to another folder; you can print, email or download them or delete them from the list. You can also search within the documents and refine the list by type. You can create a new folder or rename a folder. In addition, Copy with Reference items can be selected and copied to your device's clipboard.

Also, you can drag and drop documents to the active folder; select items from the folder to print, email or download; or switch the active folder to a different one.

To view your research history, select the History link located at the top of any page. Select the Documents link on the left side to see a list of documents you have viewed; select Searches to see a list of all searches you have conducted and select All History to retrieve your full history, which is retained for one year. You can filter your history list by date, keyword search it, or filter by client file and by event. The history trail appears in reverse chronological order, where you can see the search you conducted, subsequent filters added to the search, and cross-references viewed. You can print, email or download this list.

To logout of Taxnet Pro, select the Logout link located at the top of any page. Your session details appear, which you can then print. To sign back in to Taxnet Pro, select the Sign Back On button. We hope that this tutorial has given you a good overview of the Taxnet Pro site and has provided you with enough information to get you started. This ends the Taxnet Pro Getting Started tutorial.

For assistance using Taxnet Pro select the Help link located at the top of any page and then select Learn It to access other Taxnet Pro tutorials and Quick Reference Cards or select Contact Us for information on how to contact our Technical and Reference Support teams. Alternatively, you can find all Taxnet Pro training and support resources in the Customer Learning Centre at www.carswell.com/learning.