

Taxnet Pro *PLUS* USER GUIDE



THOMSON REUTERS

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WE'RE HERE TO HELP

For any assistance or further information please

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VISIT www.carswell.com

WHAT IS TAXNET PRO PLUS?

Taxnet Pro *PLUS* enables you to search across multiple content sets simultaneously:

- Taxnet Pro
- TaxFind Online

Therefore with a single search you can retrieve results from both sources.

Taxnet Pro *PLUS* also enables you to bookmark results for later recall and save your searches for future re-use.

Taxnet Pro *PLUS* is accessible via hyperlinks from both Taxnet Pro and TaxFind Online which open Taxnet Pro *PLUS* in a new browser window..

The screenshot displays the Taxnet Pro PLUS search interface. On the left, a 'SEARCH TEMPLATES' menu lists various content sets: Taxnet Pro PLUS, TaxNews, Table Of Contents, Legislation, Government Documents, Commentary, Case Law, Tax & Estate Planning Centre, Corporate Tax Centre, Basic Search, Advanced Search, and APFF Centre. A callout box points to this menu, stating: 'Taxnet Pro has links on the Home Page and also left-hand Search Templates menu'. Below the menu is a 'SEARCH TEMPLATES' section with links for Taxnet Pro PLUS, TaxNews, Advanced Search, and Basic Search. Another callout box points to the 'Taxnet Pro PLUS' link, stating: 'TaxFind Online has an option on the Search Page'. The main search area features radio buttons for search methods: Custom Search (selected), Boolean Search, Directed Search, and Taxnet Pro PLUS. Below these are the 'Interactive Search' section with a 'Search terms:' input field and a 'Dates:' section with dropdown menus for '--Begin Year--' and '--End Year--'.

TAXNET PRO PLUS WELCOME PAGE

The first time you visit Taxnet Pro PLUS you will be shown this Welcome Page and asked to read and accept Terms of Use for both Taxnet Pro and TaxFind Online.

It is imperative that you read the instructions on this screen and link to Taxnet Pro PLUS from TaxFind Online at least once to ensure that you can then search TaxFind Online from Taxnet Pro PLUS in the future.

You can change language by clicking here

Logged in as: Stephen Fullerton  Canada - English

TaxFind Online 

Taxnet Pro PLUS

SEARCH CONTACT HELP



You can read the licence agreements by following the hyperlinks

One search, two great services

Taxnet Pro and TaxFind Online*

Taxnet Pro PLUS is only available to subscribers of both Taxnet Pro and TaxFind Online.

- ✓ Welcome
- Licence Agreement
- Home Page

*Used under licence from the Canadian Tax Foundation

Welcome to Taxnet Pro PLUS

Your use of Taxnet Pro and TaxFind Online is subject to the terms and conditions of the [Taxnet Pro licence agreement](#) and [TaxFind Online licence agreement](#) respectively.

PLEASE NOTE: In order to search TaxFind Online from Taxnet Pro PLUS, if you have not already done so, you first need to login to the CTF website and then click "Search TaxFind Online". In the TaxFind Online website click on the Taxnet Pro PLUS option on the search page. Clicking this option will open a new window and bring you back to Taxnet Pro PLUS with a code which will enable you to submit queries to TaxFind Online.

To start this process [go to the CTF website](#)

Should you encounter any issues searching TaxFind Online please repeat this process.

To use Taxnet Pro PLUS you must first read and accept the terms of the end-user licence agreement.

You must link to Taxnet Pro PLUS from TaxFind Online at least once, therefore follow these instructions if you linked from Taxnet Pro

CONTINUE

Click Continue to go to the Licence Agreement

BEGINNING YOUR RESEARCH

Use the Taxnet Pro *PLUS* search box to enter your query terms and to select the content sources that you need.

Taxnet Pro *PLUS*

SEARCH CONTACT HELP



Taxnet Pro *PLUS*

When you are ready to run your search simply click on the **Search** icon

Enter your search terms into the box. Leave a space between your terms for AND. Use OR for an either/or search. Alternatively put your terms within quotation marks to pick up an exact phrase e.g.: **"tax audit"**

Logged in as: Stephen Fullerton Canada - English

TaxFind Online

Search

Select Sources Clear all

- All Tax Sources
 - Taxnet Pro
 - TaxFind Online

The **check all/clear all** link allows you to quickly select/deselect all sources

One search, two great services Taxnet Pro *PLUS* and TaxFind Online*

Taxnet Pro *PLUS* enables simultaneous searching across Taxnet Pro and TaxFind Online content for subscribers of both online services.

Simply enter your search word(s) or phrase in the right pane and click the search icon.

Search results will appear as links in the Taxnet Pro *PLUS* results list.

Click a link to retrieve the document in the online service where it resides. If you are already logged in to the online service, you will not need to login again to retrieve the document.

Taxnet Pro *PLUS* understands the advanced search term operators of each online service - so you don't have to. Taxnet Pro *PLUS* will translate **and**, **or**, **"quoted phrases"** and **()** into syntax understood by each source. Search terms that have no operator between them will be joined using an implicit **and**. An icon will appear if an individual online service does not support some aspect of your search.

[Click here for our user guide.](#)


* Used under licence from the Canadian Tax Foundation

THE SEARCH RESULTS SCREEN

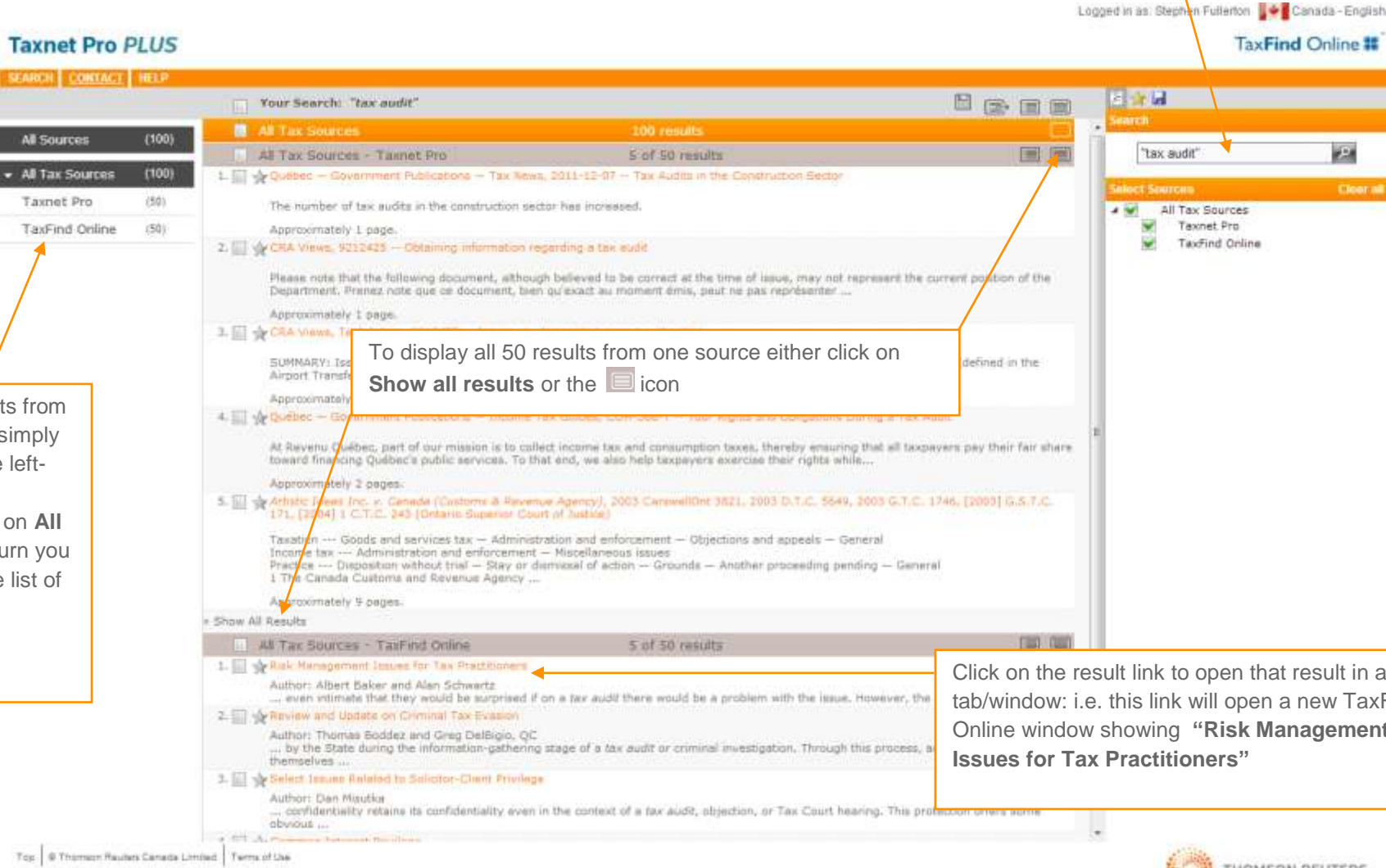
On the results screen you will see the first 5 of a maximum of 50 results from each source.

The search box is always accessible on the right-hand side of the screen so you can amend your search or begin a new search at any time

To see the results from just one source simply select it from the left-hand side of the screen. Clicking on **All Sources** will return you to your complete list of results

To display all 50 results from one source either click on **Show all results** or the  icon


Click on the result link to open that result in a new tab/window: i.e. this link will open a new TaxFind Online window showing **“Risk Management Issues for Tax Practitioners”**



BOOKMARKING RESULTS


Bookmark results so that you can access them quickly and easily at any time

STEP 1

4.  Québec — Government Publications — Income Tax Guides, COM-366-T -- Your Rights and Obligations During a Tax Audit

At Revenu Québec, part of our mission is to collect income tax and consumption taxes, thereby ensuring that all taxpayers pay their fair share toward financing Québec's public services. To that end, we also help taxpayers exercise their rights while...

Approximately 2 pages.


5.  *Artistic Ideas Inc. v. Canada (Customs & Revenue Agency)*, 2003 CarswellOnt 3821, 2003 D.T.C. 5649, 2003 G.T.C. 1746, [2003] G.S.T.C. 171, [2004] 1 C.T.C. 243 (Ontario Superior Court of Justice)


Taxation --- Goods and service
Income tax --- Administration g
Practice --- Disposition without
1 The Canada Customs and Re


Approximately 9 pages.


» Show All Results

All Tax Sources - TaxFind Online 5 of 50 results

1.  Risk Management Issues for Tax Practitioners
Author: Albert Baker and Alan Schwartz
... even intimate that they would be surprised if on a *tax audit* there would be a problem with the issue. However, the ...

2.  Review and Update on Criminal Tax Evasion
Author: Thomas Boddez and Greg DelBigio, QC
... by the State during the information-gathering stage of a *tax audit* or criminal investigation. Through this process, advisors themselves ...

Click on the  icon to the left of a result to add that result to your bookmarks. The star will turn from grey to yellow to show that the result has been added. You can click on the star again to remove the bookmark

Click on the  icon in the top right-hand corner to see all of the results that you have bookmarked

STEP 2

Bookmarks



Items per page: 15

Search:

Title	Source	Bookmarked
<input type="checkbox"/> Review and Update on Criminal Tax Evasion	TaxFind Online	07/08/2013 
<input type="checkbox"/> Québec — Government Publications — Income Tax Guides, COM-366-T -- Your Rights and Obligations During a Tax Audit	Taxnet Pro	07/08/2013 
<input type="checkbox"/> Artistic Ideas Inc. v. Canada (Customs & Revenue Agency), 2003 CarswellOnt 3821, 2003 D.T.C. 5649, 2003 G.T.C. 1746, [2003] G.S.T.C. 171, [2004] 1 C.T.C. 243 (Ontario Superior Court of Justice)	Taxnet Pro	07/08/2013 
<input type="checkbox"/> Risk Management Issues for Tax Practitioners	TaxFind Online	07/08/2013 

To view a bookmarked result simply click on the link


Bookmarks can be removed by clicking on the  icon on the right-hand side

Search  

Search "tax audit"

Select Sources Clear all

- All Tax Sources
- Taxnet Pro
- TaxFind Online

You can click on the  icon to return to your search results at any time

SAVING SEARCHES

Save links to your favourite searches to be used whenever you need them, making your research even easier!


STEP 1




The screenshot shows a search results page for the query "tax audit". The page has a navigation bar with "SEARCH", "CONTACT", and "HELP". Below the navigation bar, there are several tabs: "Your Search: 'tax audit'", "All Tax Sources" (100 results), "All Tax Sources - Taxnet Pro" (5 of 50 results), and "All Tax Sources - TaxFind Online" (50 results). The main content area displays search results, including a link to "Québec — Government Publications — Tax News, 2011-12-07 -- Tax Audits in the Construction Sector" and a link to "CRA Views, 9212425 -- Ob".

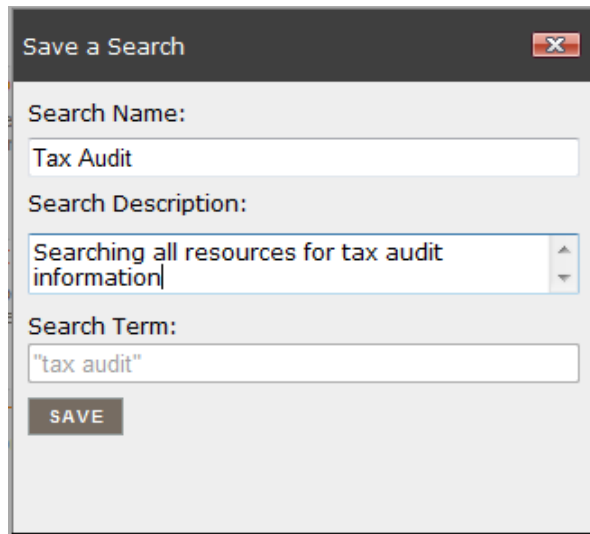
Annotations:

- An arrow points to a "Save this Search" icon (a floppy disk) at the top of the page.
- An arrow points to a "View all saved searches" icon (a folder) in the top right corner.

Click on the **Save this Search** icon () at the top of the screen to save your search. Both the search terms you have used and the content sources you have selected will be stored.

Click on the  icon to view all of the searches that you have saved

STEP 2



The "Save a Search" pop-up box contains the following fields:

- Search Name:** Tax Audit
- Search Description:** Searching all resources for tax audit information
- Search Term:** "tax audit"
- SAVE** button

When you click on **Save this Search** a pop-up box will appear which will allow you to name your search and to add an optional description.

PRINTING, EMAILING AND EXPORTING RESULTS

STEP 1

Your Search: "tax audit"

All Tax Sources 100 results

All Tax Sources - Taxnet Pro 5 of 50 results

1. Québec — Government Publications — Tax News, 2011-12-07 -- Tax Audits in the Construction Sector

2. CRA Views, 9212429

3. CRA Views, Tech Int

Annotations:

- Tick the box to the left of a result to select that result for print, email or export. You can tick the box to the left of a source (e.g. **Taxnet Pro**) to select all the results from that source. Alternatively tick the box to the left of **Your Search** to select ALL of your results
- Click on the icon at the top of the screen and select **Email Results**, **Export Results** or **Print Results** to deliver all selected results

STEP 2

Email Results

Share Results

All Results Selected Results

Select Result Format

HTML (Web Page Format)

Plain Text

RTF (Rich Text Format)

Email Subject: Search Results

Recipients:

For Email:

- Choose whether to deliver **All** or **Selected** results.
- Select your preferred format.
- Add a **Subject** heading.
- Add **Recipients** separated by a comma, or semi-colon;
- Click **Send**

Export Results

Share Results

All Results Selected Results

Select Result Format

HTML (Web Page Format)

Plain Text

RTF (Rich Text Format)

For Export:

- Choose whether to deliver **All** or **Selected** results.
- Select your preferred format.
- Click **Export...**

For Print:

- Choose whether to deliver **All** or **Selected** results.
- Click **Print...**

Print Results

Share Results

All Results Selected Results