

Taxnet Pro™

Federated Press Centre

Thomson Reuters Canada is the exclusive publisher of Federated Press tax publications which consists of the two series. The Corporate Tax Planning and Personal Tax Planning Journals are available by annual subscriptions in Taxnet Pro. You may find both archival and future issues of the Corporate Tax Planning and Personal Tax Planning Journal series in the Federated Press Centre.

How do I set up my OnePass account and Sign In/Out of Taxnet Pro?

All Taxnet Pro users must set up a OnePass account where you create your own Username and Password.

To set up a OnePass account, select **Create a new OnePass Profile** located below the Sign In section and then follow the instructions that appear.

Important note: If you subscribe to other Thomson Reuters products and have already registered a OnePass Account, go to the Manage Products section and add your Taxnet Pro registration key to that account. However, if you currently do not have a OnePass Account, you must create one in order to sign in to Taxnet Pro.

To sign in to Taxnet Pro:

1. Using a web browser go to: www.taxnetpro.com.
2. Enter your OnePass Username and Password into the fields provided and select **Sign In**.
3. Select **Save my Username** or **Save my Username and Password** to save your OnePass sign in credentials on your computer. (This is optional but highly recommended.)

To log out of Taxnet Pro, select the **Logout** link located on the Toolbar.

Accessing the Federated Press Centre

Select **Centres** from the Menu bar and then select **Federated Press Centre** to use sources and search tools specific to this area of research.

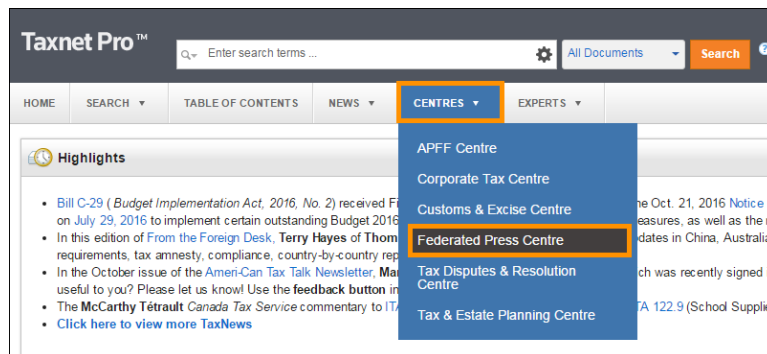


Figure 1: Centres drop-down displaying Federated Press Centre option

Navigating the Federated Press Centre

Figure 2: Federated Press Centre start page

- 1 Centre Navigation** Select a link in the left panel to directly access a subscription type.
- 2 Menu bar** Access the Taxnet Pro home page, search templates, Table of Contents, and TaxNews. Retrieve the landing page for each Centre or search for an expert.
- 3 Quick Search** Enter your terms into this search box to search the entire Federated Press Centre or selected content by using the drop-down list.
- 4 Toolbar** Access your research history, documents saved to your folders and various preferences set in Options. You can also access online help, switch to the French interface and logout of the service.
- 5 Active Folder** Access your Active Folder.
- 6 Highlights** Find editorially selected journal articles here. Headlines and summaries are generally provided for each article. The headline is a link to the full document.
- 7 Spotlight** Read about an author who has written for our newsletter or commentary area with full biographical information.

Corporate Tax Planning Series

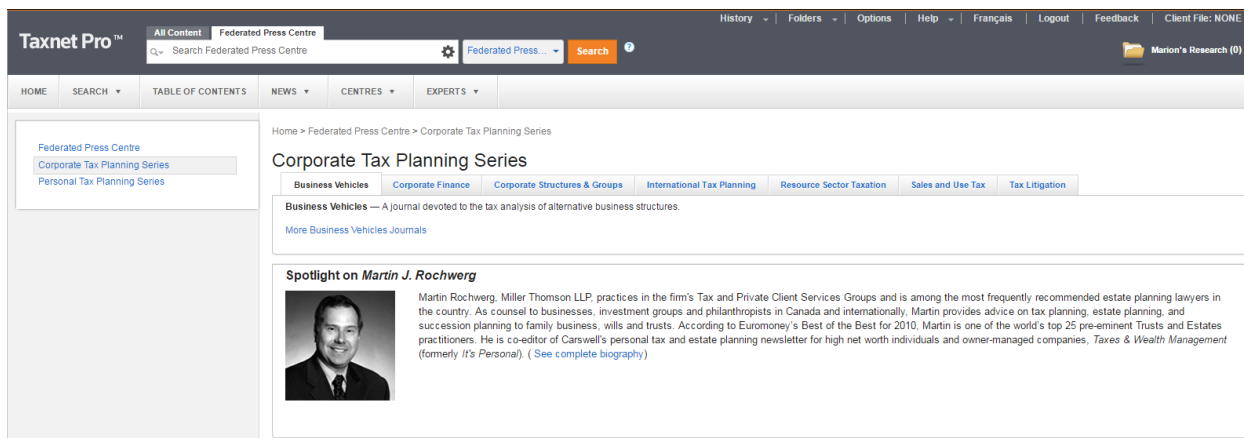


Figure 3: Corporate Tax Planning Series page

Select a tab to access journals devoted to the following topics:

- | | |
|--|--|
| Business Vehicles | The tax analysis of alternative business structures. Archive only. |
| Corporate Finance | Tax issues in corporate finance. |
| Corporate Structures & Groups | The tax aspects of structuring and restructuring corporations and other business entities. Archive only. |
| International Tax Planning | The international aspect of tax planning. |
| Resource Sector Taxation | Tax aspects of interest to the resource sector. |
| Sales and Use Tax | To Canadian commodity tax developments, including GST/HST, excise taxes and provincial sales taxes. |
| Tax Litigation | Litigation issues for tax practitioners. |

Personal Tax Planning Series

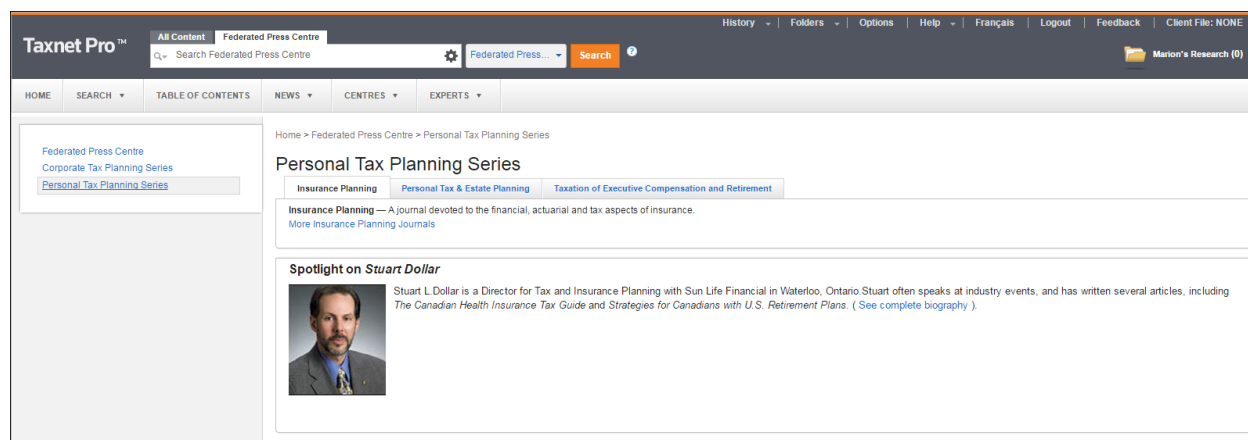



Figure 4: Personal Tax Planning Series page

Select a tab to access journals devoted to the following topics:

- | | |
|--|---|
| Insurance Planning | The financial, actuarial and tax aspects of insurance. |
| Personal Tax & Estate Planning | Effective tax planning for estates, trusts and individuals. |
| Taxation of Executive Compensation and Retirement | The design of tax-effective compensation for executives. |

How do I search Federated Press Centre content?

Quick Search:

1. Enter your Boolean query into the Quick Search box at the top of the page. *Alternatively*, select the Query Builder icon () to retrieve a search template.

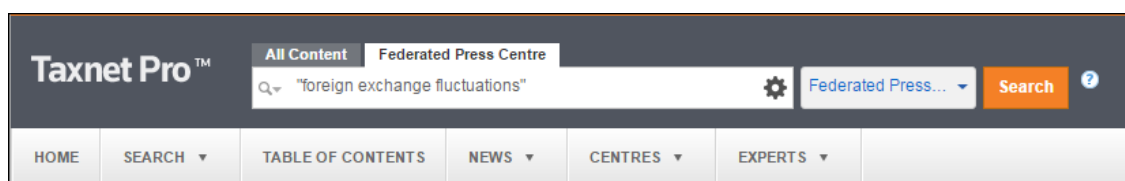


Figure 5: Quick Search

2. Select **Search**.

TIP: To restrict your search to a specific subscription, select it from the Federated Press Centre drop-down list.

How do I navigate my results list?

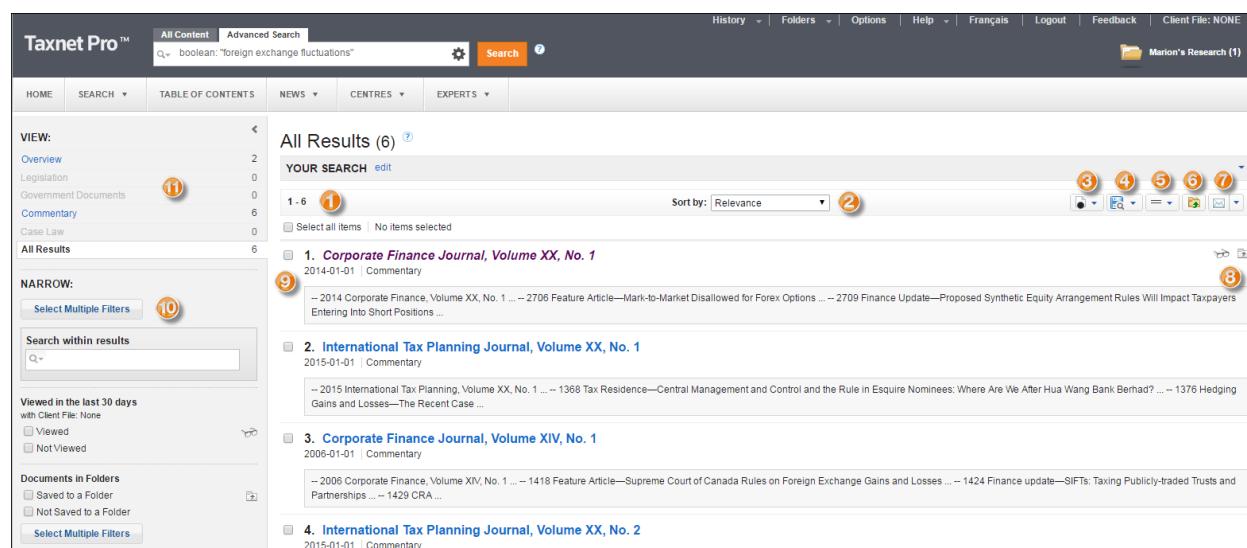


Figure 6: Results List

- 1 Next/Previous Page** Navigate to your results list pages.
- 2 Sort by** Re-sort your results list. (Relevance, Table of Contents or Reverse Chronological).
- 3 Show All Documents** Switch between displaying all documents or only those that are included in your subscription.
- 4 Save Searches** Save this search to auto-run again.
- 5 View Detail** Select from three levels of document details to display.
- 6 Save to Folder** Save documents to the Taxnet Pro folder.
- 7 Delivery Method** Print, email or download documents. The default option is the option last chosen.
- 8 Document Icons** Eyeglasses indicate document was viewed within the last 30 days for this client ID. Folder icon indicated document was saved to a folder.
- 9 Document Title** Purple title indicates the document was viewed within the last 24 hours. Select the title to retrieve the full text. Select the document checkbox to print, email, and download or to save multiple documents to the folder at one time.
- 10 Narrow section** Select from a number of customized filters to narrow your search.
- 11 View section** Select a content type to view.

How do I print, email or download or save in Taxnet Pro?

Select the Delivery Method drop-down arrow located on the results list or on the document page and then choose your option. Follow the instructions that appear. **Note:** The last option you selected becomes your default delivery method.

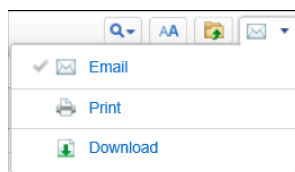


Figure 7: Delivery Method

How do I access documents in a book format?

1. Select the **Table of Contents** tab from the Menu bar.
2. Select the arrow next to the **Federated Press Centre** heading and subsequent headings to find the document you want.

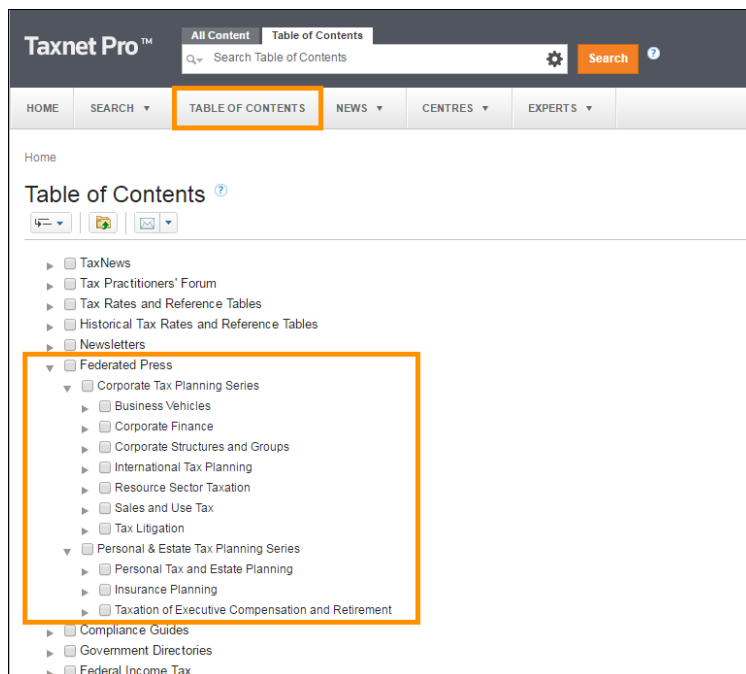



Figure 8: Table of Contents with Federated Press Centre heading expanded

3. Select the document link to retrieve the full text.

Folders

Taxnet Pro helps you organize and manage your research by storing your documents and snippets of text into folders.

Saving to a Folder

To save the document you are viewing into a folder, select the **Save to Folder** icon () on the document toolbar. Select the folder in which you want to save the document and select **Save**. You may drag and drop items into your Active folder at any time.

To save documents from a result list, select the checkboxes next to the documents you want to save and select the **Save to Folder** icon. Select the folder where you want to save the documents and select **Save**.

To save selected text into your active folder, highlight the text you want to save and choose *Save to...* from the pop-up menu.


To view documents and snippets of text you have saved into your active folder, select your active folder. To view documents/snippets saved into another folder, select **Folders** at the top of any page and then select the name of the folder containing the documents.

Changing and Creating New Folders

To create a new folder, do one of the following:

- Select **Folders** at the top of any page. The Folders page is displayed. Select **New**. The New Folder dialog box is displayed. Enter the name of the folder into the *Folder Name* text box, select a location for the new folder, and select **OK**.
- While viewing a document or a results list, select the **Save to Folder** icon, and then select **New Folder**. Enter the name of the folder into the *Folder Name* text box, select a location for the folder, and select **OK**.

The active folder is the folder that is displayed on the right side of the Toolbar.

To change the active folder, select the active folder and then select the **Change Folder** icon (). The Change Folder dialog box is displayed. Select the folder you want and then select **OK**.

To learn more about folders, please review the tutorials located in the [Customer Learning Centre \(www.carswell.com/learning/taxnetpro/folders\)](http://www.carswell.com/learning/taxnetpro/folders).

How can I track my research?

A research history is automatically created when you sign on to Taxnet Pro and is saved when you end your research session. The trail displays all searches conducted and documents viewed. They are retained for one year after they are saved. You may print, email or download any trail.

Access your most recently viewed documents and searches by pointing to the History link at the top of any page **OR** select the link to retrieve your complete history from the past 12 months.

Where can I find help?

- **Product Support:** Included with your subscription.
 - Call: 1-800-387-5164 or 416-609-3800 (Toronto).
 - **Technical:**
 - Email: TechSupport.LegalTaxCanada@tr.com
 - Weekdays: 7:00 am – 9:00 pm (ET)
 - Weekends and Ontario holidays: 7:30 am – 8:00 pm (ET)
 - **Research:**
 - Email: ResearchSupport.LegalTaxCanada@tr.com
 - Weekdays: 8:30 am – 5:00 pm (ET), excluding holidays
 - **OnePass and Log in Issues:** 24/7

Select the **Learn it** option from the **Help** link located at the top of any Taxnet Pro page to access Quick Reference Cards and video tutorials or select **Contact Us** for information on how to contact our Product Support team.

Alternatively, visit the [Customer Learning Centre](http://learning.thomsonreuters.ca) (learning.thomsonreuters.ca) to access these same resources as well as sign up for a live public webinar facilitated by a Certified Professional Learning Consultant.