



Quick Reference Guide

How to Use The BNA Tax Management Web Library

Updated January 2005

Client Relations and Training

800.223.7270

(9am-7pm EST)

www.bnatax.com

Home Page

Navigating the Home Page

The screenshot displays the BNA Tax Management Library home page, which is organized into two main sections: Federal/Foreign Tax Library and State Tax Library. The page features a navigation menu on the left, a search bar at the top, and various content categories such as Expert Analysis, News and Developments, Journals, Reports, Commentary, Primary Sources, and Practice Tools. Red callout boxes provide detailed instructions for navigating these sections.

Navigation Callouts:

- Mouse over to search the Federal/Foreign or State Library
- Click here to find out about related BNA Software products
- Click here for a Free Trial or to log on to the Payroll Library
- Locate information by topic using Indexes
- Find out about important new information here
- Access a Specific Portfolio, Tax Practice Series Chapter, or Primary Source document
- Sign up for E-mail Highlights
- Start your research in the Code or Regs and then, locate related discussion in the analysis by clicking the Find \$ button
- Full text of Rev Ruls, Rev Procs, Notices, Announcements, PLRs, TAMs, TEAMs, CCAs, FSAs, or SCAs
- Full text of Federal Tax Cases from 1913 to present
- Over 10,700 Interactive Federal tax forms
- Locate answers to questions on line items found in Forms 1040, 1120, 1120S & 1065 in the Tax Practice Series
- Daily or weekly state tax news updates
- Articles by leading tax authorities on a variety of emerging state tax issues
- Full text of State Tax Statutes, State Tax Regulations
- Access nearly 6,000 interactive state tax forms
- Find out about forms filing dates, meetings and events

Page Content:

BNA Tax Management Library
Related BNA Products: [BNA Software](#) [Payroll Library](#)

Federal/Foreign Tax Library State Tax Library Menu ↓

Expert Analysis
U.S. Tax Overview
U.S. Income Portfolios
Estates, Gifts and Trusts Portfolios
Foreign Income Portfolios
Tax Practice Series

News and Developments
Daily Tax Report Highlights
Daily Tax Report
Weekly Report
Tax Practice Bulletin

Journals, Reports, Commentary
Insights and Commentary
Tax Management Memorandum
Compensation Planning Journal
Real Estate Journal
International Journal
Estates, Gifts and Trusts Journal

Primary Sources
Internal Revenue Code
Treasury Regulations
IRS Proposed Regulations
Treasury Decision Preambles
IRS Documents
Federal Tax Cases
Industry Specialization Papers
Circular 230
IRS Publications
Legislation
Tax Treaties

Practice Tools
2003 Tax Forms
Federal Tax Calendar
List of Working Papers
Tables, Charts and Lists
List of Client Letters and Practice Aids
List of Election Statements
Forms Line-by-Line Guide
e-Financial Analyst

State Tax Library Federal/Foreign Tax Library Menu ↑

Expert Analysis
State Portfolios

News and Developments
Daily Tax Report Highlights
Daily Tax Report
Weekly State Tax Report
Weekly State Tax Regulatory Alert

Journals, Reports, Commentary
Insights and Commentary
State Tax Special Reports
State Tax Legislation Summaries
State Tax Regulation Summaries

Primary Sources
State Tax Statutes
State Tax Regulations
State Supreme Court Cases

Practice Tools
2003 Tax Forms
List of Working Papers
Tables, Charts and Lists
Glossary
Calendar of Events
Links to Websites

Navigation Menu: Search, Indexes, Go To, Home, Daily Tax Report, Federal/Foreign, Tax Practice, State, What's New, User's Guide, Library Tour, Contact Us, Site Map, Help, Authors/Advisory Board, www.bnatax.com, www.bnasoftware.com

Other Elements: New 2004 Tax Legislation, E-mail Highlights Sign-up

Note: The Library is best viewed using Internet Explorer (5.01 or higher) or Netscape (7.0 or higher) at screen resolutions of 800x600 or higher. For assistance call Client Relations & Training at 800.223.7270.

Finding Information

Starting Research in the Code and Regs. and Going To Relevant Portfolio or Tax Practice Analysis

- 1 Click **Go To** on the top of the Left Navigation Bar
- 2 Enter your Code Section number in the **Internal Revenue Code §** **Go** box
- 3 Click on **Go**
- 4 Click on the title of the Code Section to access full text
- 5 Click on the **Find § in Portfolios** button or the **Find § in Tax Practice** button in the text
- 6 Click **View TOC** to see a listing of your results or click **View DOC** to go to the first document containing a discussion of the Code Section

Note: You can also start your research in the Regs. and link to the related Code Section, Treasury Decision Preambles, or analysis discussing a Treasury Reg. following the same steps as detailed above.

Locating Information by Browsing

- 1 Click to select your Library section (e.g., U.S. Income Portfolios)
- 2 Click on any plus sign appearing before a heading
- 3 Continue to click plus signs until you locate the information
- 4 Click on heading to read discussion

Locating a Portfolio or Tax Practice Chapter Table of Contents

- 1 Click on any underlined blue heading appearing in the text
- 2 Click on any heading in the Table of Contents to return to the text

Going Directly to a Portfolio or Primary Source Document

- 1 Click **Go To** on the top of the Left Navigation Bar from anywhere in the Library
- 2 Click in the appropriate box and type the desired Portfolio number (you can also select a Portfolio from the drop down list option), primary source document number, or Federal Tax Case Citation
- 3 Click **Go** button

Note: You can also locate a list of Portfolios and Tax Practice Series Chapters on the Go To template.

The screenshot shows the 'Go To' search interface. At the top, there are two callout boxes: 'Enter Portfolio number here' pointing to the 'U.S. Income Portfolios' input field, and 'Click the down arrow to display a list of Portfolios' pointing to the dropdown arrow next to it. Below this is a table of portfolio categories with 'Go' buttons and links to lists. The 'Primary Sources' section includes input fields for 'Internal Revenue Code §', 'Treasury Regulation §', 'Proposed Reg. Project #', 'Treasury Decision #', 'Federal Tax Case Citation', and 'IRS Document #'. A callout box 'Enter the case citation and then click 'Go' or click 'Advanced Case Search' to retrieve a case by name, judge, court, date or docket number or by any combination' points to the 'Federal Tax Case Citation' field. Another callout box 'Enter appropriate primary source document number and then click 'Go'' points to the 'Go' button next to the 'Federal Tax Case Citation' field. At the bottom, there are checkboxes for 'Revenue Rulings', 'Revenue Procedures', 'Notices', and 'Announcements', and a field for 'PLRs, TAMs, TEAMs, CCAs, FSAs and SCAs #'. The 'Advanced Case Search >>' link is also visible.

Note: If you are unsure of the accuracy of any number within a primary source document cite, you can also use the question mark (?) wildcard to replace this number and still go to a document (e.g., 2 ? .6001-1).

Searching

Locating Relevant Information by Topic with the Keyword Index

- 1 Click on **Indexes** appearing at the top of the Left Navigation Bar
- 2 Click on the appropriate **Keyword Index** (e.g., U.S. Income Portfolios)
- 3 Click on the appropriate letter at the top of the screen corresponding to the first letter of the topic
- 4 Click on the topic heading

Note: You can also locate relevant Code Sections or Treasury Regs. by topic using the Keyword Index for Primary Sources.

Searching More Than One Section of the Library with the Global Search Template

- 1 Mouse over **Search** from the Home page at the top of the Left Navigation Bar and then click to select **Federal/Foreign** or **State**
- 2 Type search term(s) in the Enter words or phrases box
- 3 Click to select content to be searched
- 4 Click on the **Search** button to execute

Note: The Global Search Template can also be accessed from anywhere in the BNA Tax Management Web Library (e.g., IRS Documents) by mousing over Search then clicking on Global.

Constructing a Query to Locate an Exact Phrase

- 1 Mouse over **Search** appearing at the top of the Left Navigation Bar of any Library screen
- 2 Click on **Search** option (e.g., Federal/Foreign (Global), Word, etc.)
- 3 In the Search for box, enter the terms within quotation marks (e.g., "like kind exchange")
- 4 Click on **Search** to execute

Searching a Portfolio or Tax Practice Chapter with the Special Search Template

- 1 Click to select the desired Library section (e.g., Portfolios or Tax Practice Series)
- 2 Mouse over **Search** appearing at the top of the Left Navigation Bar
- 3 Click on **Special**
- 4 Enter search terms in the Search for box
- 5 Click the down arrow to select a Portfolio or Tax Practice Chapter, or click a box to select a topic group(s)
- 6 Click on **Search** to execute

Note: The Special Search Templates are customized and will vary in appearance and function from Library section to Library section.

Searching for Primary Source Citations in the Analysis with the Citation Search Template

- 1 Click to select Library section (e.g., U.S. Income Portfolios)
- 2 Mouse over **Search** appearing at the top of the Left Navigation Bar
- 3 Click on **Citation**
- 4 Click in the desired citation box and enter citation (e.g., 401(a))
- 5 Click on **Search** to execute
- 6 Click on **OK** (twice) to accept

Note: The Citation Search Template is not available in all Library sections.

Search Results

Viewing Search Results


View TOC provides a list of the documents containing your results (search terms) while

View DOC allows you to view the first document containing your results (search terms)

Retrieving Previous Search Results

The **Results: 1 2 3** feature (located in the upper right-hand portion of the screen) allows you to retrieve your results from the last three searches executed. For example, to view the results for your most recent search executed, click number 1.

Keeping History of Search Terms

You can keep a history of your search terms using the Internet Explorer (IE)  browser. To set up history in the IE browser ...

- 1 Click **Tools** on the menu line
- 2 Click **Internet Options**
- 3 Click the top tab labeled **Content**
- 4 Click the **AutoComplete** button (lower right side)
- 5 Click to check the **Forms** box

Note: History is a feature unique to IE and, once enabled, will be available in other programs accessed through IE. Check with your Network Administrator if your rights to make changes in Internet Options are restricted. For technical assistance, call BNA Customer Support at 800.223.7270, option 2.

Navigating

Viewing Your Library Content

From the Home page, content included in your subscription is indicated in dark type.

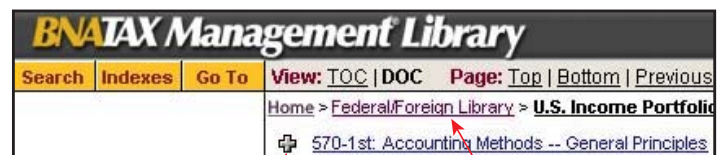
Displaying Levels of Information

The ribbon bar **1 2 3 4 5 All** (located in the upper right-hand portion of the screen) controls the level of information to be displayed. To access and use the ribbon bar...

- 1 Click to select the Library section (e.g., U.S. Income Portfolios)
- 2 Click **2** to display 2 levels of information
- 3 Click **4** to display 4 levels of information
- 4 Click **All** to display all levels of information

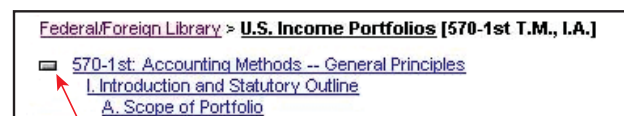
Finding Your Location in the Library

The **linkable navigation path** at the top of each screen shows you where you are in the Library.



Click the plus sign to expand and find your document's exact location




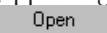
Click to return to Federal/Foreign Main Menu



Click minus sign to collapse



Forms

Accessing Last Year's Forms


- 1 Click  icon or **File/Saved Forms and Profiles** or press **Ctrl + O** keys
- 2 Click the plus sign   2003 in front of the previous year's folder to display clients
- 3 Click to select the client file folder, click to select form (appearing at the bottom half of window) and then click  button

Note: You can follow the above steps to also access saved client information/forms. Also, you may get the **File conversion needed** dialog box when accessing last year's saved tax forms or profiles. In order to access the saved form or profile, you must convert to the 2004 tax year format. Click Yes on the dialog box to convert to current format. You will not get this dialog box when accessing any form which has been saved or opened with the 2004 tax year program.


Creating a Client Profile

- 1 Click  icon or click **File/New Profile** or press **Ctrl + N** keys
- 2 Click to select profile type (e.g., Individual, Entity, or Preparer) and then click on **OK**
- 3 Complete the form (last name is required for Individual and Preparer. Legal name is required for Entity.)
- 4 Click  icon to save

Note: Any newly created client profile must first be saved before that information can be transferred onto a form.

- 5 Click on  to close or click **File/Close Form**

Saving a Form

- 1 With the form on screen, click  icon to save or click **File/Save**


Note: The first time a form is saved, a dialog box will appear giving you an opportunity to apply a saved profile. If you click Yes, you will be able to select and apply a saved profile from Saved Files and Profiles. If you click No, you will not be able to apply a profile.

Saving to a Different Name

- 1 With the form on screen, click **File/Save As Different File**
- 2 Press the **Delete** key and enter new file name (e.g., Little_1040_2004) in File name: box
- 3 (Optional) Click down arrow at far end of Save in: box

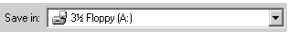



and then click to select drive/directory or folder to change save location

- 4 Click  button

Note: For archiving purposes, it is recommended that date and client name be included as part of the file name.


Saving a Form to a Disk

- 1 With the form on screen, click **File/Save As Different File**
- 2 Press **Delete** key (to delete default file name) and enter the name of file in File Name: box
- 3 Click down arrow at the far end of Save in: box , click to select A: drive and then click  button

About our forms: All electronic forms appearing in the forms' program have been approved by the appropriate jurisdiction. As jurisdictions approve additional forms, they are added to the service.

Printing

To Print


- 1 Click on **Print** button  at the top of the screen
- 2 Click the appropriate radio button to select the text to be printed
- 3 **(Optional)** Click to select the desired format (e.g., Printer-friendly) if other than default, Rich Text Format ("RTF") for importing into word processing
- 4 Click the **Display/Print** button

Note: Text will import into selected format and from there you can print it

- 5 Click the Back button to return to Library

Note: For Windows users, a download dialog box may appear when the **Display/Print** button is clicked. To proceed simply click on the **Open** button appearing in the dialog box.

To Print Selected Text

- 1 Click, hold down left mouse button, and drag mouse to select text
- 2 Click on **Print** button  to launch Print Dialog Box

Note: The selection text radio button is automatically selected along with the printer-friendly version

- 3 Click **Display/Print** button
- 4 At next screen, click **Print Now**  icon
- 5 Click **Print** button