

Electronic Tax Summary

user guide



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To ensure you are getting the most out of your Electronic Tax Summary, we have put together this booklet for your use and reference.

THE TOOLBAR

The Taxpayers Australia Tax Summary Toolbar has the following functions:



The Backtrack to Master TOC button returns to the table of contents.



The Backtrack button retraces the steps to the current location. Alternatively, press the Escape key or select Backtrack from the File menu.



The Prune button toggles the automatic expansion and contraction (pruning) of the tree in the left frame. Alternatively select Prune from the View menu. When pruning is off, the button appears as shown at left.



This is the appearance of the Prune button when pruning is on. Click it to turn pruning off.

Search for

The search box where you can type a word, a phrase, or logically connected words.



The Search Forward button starts a search forward in the publication.. A green dot is placed alongside each document in the left frame which contains the terms and the number of matching documents is reported in the status bar at the bottom of the window.



The Search Backward button performs the search in the publication from the current location back to the beginning.. A green dot is placed alongside each document in the left frame which contains the terms and the number of matching documents is reported in the status bar at the bottom of the window.



The Search Publication button performs a search of the entire publication. A green dot is placed alongside each document in the left frame which contains the terms and the number of matching documents is reported in the status bar at the bottom of the window. The hitmap can be cleared by clicking this button again.



The Stop Search button stops the current search.



The Pad button displays the Pad menu.



The Note button displays the Note menu.



The Cut button moves the currently selected notes to the clipboard.



The Copy button copies the currently selected text to the clipboard. See "Copying Text" for more information.



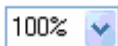
The Paste button replaces the currently selected notes with the text, files or notes on the clipboard.



The Send button sends the currently selected notes via email.



The Print button sends the current document or selected text to the printer.



The Zoom control sets the zoom or magnification for the screen display and printout.

NAVIGATION

How do I move around?

When the program starts up the MasterTable of Contents is displayed.

You will see that the window presents two frames – the one to the left shows the contents of the publication as a tree and the one on the right shows the section you are currently using. To return to the MasterTable of Contents click on the 'Home' symbol top left on the toolbar.

You can move around the document in several ways –

- you can jump to a section from the table of contents by clicking (double-clicking is no longer necessary) on the blue text, or
- you can jump at any time by clicking on the relevant part of the tree in the left frame.

When you arrive at a section it is highlighted in the left frame and the text shown in the right frame.

You can also scroll through the document (as you scroll through a section it will be highlighted in the left frame) or you can use the + and – keys (keypad) to move in sequence through the sections. Again, the left frame will show where you are – you are never lost in the document.

The Up, Down, Page Up, Page Down, Home and End keys work in the usual fashion. A frame is made active for these keys by pressing the Tab key.

Why is some text highlighted in blue?

These are links. Just click on the highlighted text to follow a link.

SEARCHING

How do I search?

You can either move your cursor to the search box and enter text direct, or use the search menu and select 'Specify Search Criteria', or press F2 which will also bring up the search menu.

When you have entered the word(s) press Enter and the first occurrence of the word(s) will be highlighted. You can continue the search for the same word(s) by using the search forwards and the search backwards buttons. The number of matching documents is displayed in the status bar at the bottom of the window.

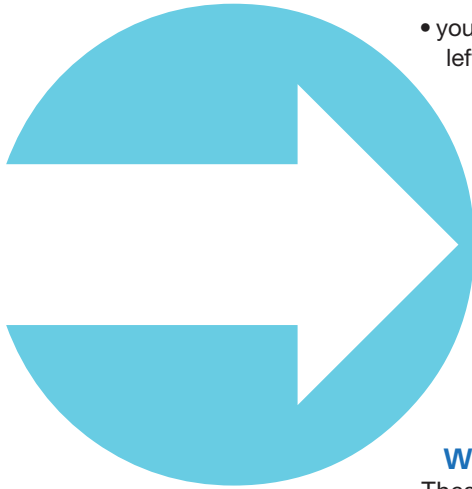
If you have a long search string in another application you can drag it into the search box rather than typing it direct or you can drag the word(s) into the left frame and drop onto a section. If you do this the search will start from that section.

What are the green dots?

When you perform a search a green dot appears in the left frame next to the section or sections containing the search term. You click on the green dot to find the first match in a section or to drill down to a section containing the first reference.

What are the red numbers?

When you perform a search a red number appears in the left frame next



to the section or sections containing the search term. The number is the hit count, i.e. the number of matches in that section and its subsections. If you make the left frame wider, you will see more detail, such that the number of matching documents. You can control the detail displayed using the View/Hit count command.

Can I use more powerful search techniques?

You can conduct focused searches. For instance you can look for strings of words and logically related words. You can use & (AND) and | (OR) to search for areas of the text that have, for example, the words 'brown' and either 'cat' or 'dog' nearby by searching for: brown & (cat | dog).

You can also use wild-cards to find words that can have different endings or words where you are not sure of the spelling - by using either the * (match any number of characters) or the ? symbols (match any single character). For example to find a word such as 'minister', 'ministerial' and 'ministry' you could search for minist*, to find 'words' and 'wards' you could use w?rds.

NOTES

Can I add notes of my own?

Yes. These are 'living documents' and you are able to add your own notes either directly or by dragging notes out of another application. (See Notes – How do I use Notes? for further information)

How do I use Notes?

You can attach personal notes to any text or graphics in this publication. Click the Note button and select New to create a note. A note window is displayed in which some suggested text for the note is displayed on a yellow background at the top of the window. You can add to the text or replace it entirely. Click Ok when you are done. A note symbol (a small yellow dog-eared page) appears in the left margin to indicate that a note is attached to that section. When the cursor is over the note symbol, the first line of the note appears at the bottom of the window. Double click the note symbol to reopen the note window and read the rest of the note. The same note can be attached at several different places in the publication by using the Attach command on the Note menu.

You can also attach notes by dropping text and files onto the left or right frames. If you drop text onto the left frame you will need to press the Alt key during the drop to attach the text as a note, otherwise the text will be searched for in that section.

You can drag note symbols to a different location in the left or right frames in this publication or to any other application. Use control-click to select more than one note symbol.

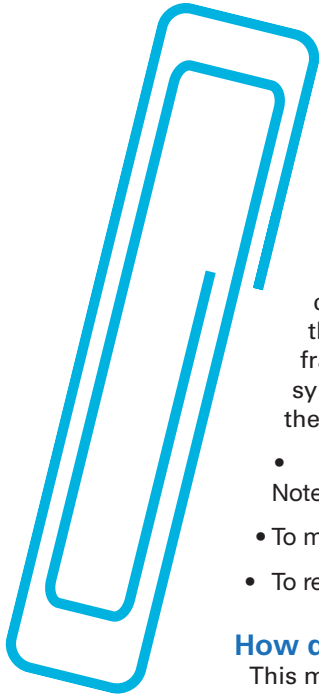
Your notes are stored in the folder displayed by the Status command on the Note menu. Please make regular backups of this folder.

You can attach files, web addresses and email addresses to notes. The items attached to a note are displayed at the bottom of the note window and are sorted alphabetically.

To attach an item, click the Action button in the note window and select New. Type an email address, a web address or a filename. If a filename is entered, the file is created in the note folder under Files. The file is in RTF and can be edited with WordPad, Word or any other editor which supports RTF.



The publication guesses the type of the item. If it makes a mistake, use the Rename command on the Action menu to correct it. Use the prefix `mailto:` to indicate email addresses and `http:` to indicate web addresses.



Existing files in any format can be attached to a note using the Attach File command on the Action menu. The Attach Copy command also attaches a file but a copy of the file is made and kept in the note folder. The usage of files in the note folder is monitored and you will be prompted when a file is no longer attached to a note. Files may also be attached to notes by dragging the files from Windows Explorer onto the left or right frame or the note window.

When a note is copied to the next version of this publication an attempt will be made to attach it to the same section. If the section can't be found it will be attached, not to the previous section, but to the surrounding section. This is the section one level up in the left frame. The note symbol is displayed in red. If you point to the note symbol, the previous location of the note is displayed at the bottom of the window.

- If the new location is acceptable, use the Accept Move command on the Note menu.
- To move it to a different place, drag the note symbol to the required location
- To remove it, select it and press the Delete key.

How do I use the Action Menu?

This menu is displayed when the Action button in the note window is clicked.

New	Creates a new item and attaches it to the note. If the item is not recognised as an email or web address, and has no extension (.jpg etc) it is assumed to be an RTF file and is created in the note folder.
Attach File	Attaches any accessible file to the note.
Attach	A list of all the items attached to all of the notes in the publication is presented. The one selected is attached to the current location.
Attach Copy	If no item is selected in the note window, a window is displayed to allow a file to be chosen. A copy of the file is made in the note folder and is attached to the note. If an item is selected, a copy is made of it.
Cut	Selected item is detached from the note and placed on the clipboard.
Copy	Selected item is placed on the clipboard.
Paste	Any files on the clipboard are attached to the note.
Open	Only available when an item is selected. For an email address the user's default mail program is started to compose a message to that email address. For a web address, the user's default web browser is used to display the page at that address. For a file, the application normally used to edit files of that type is started. For the RTF files created by the New command, this is usually WordPad or Word.
Rename	Allows the name of the selected item to be changed. This may also change the type of the item.

Detach The selected item is detached from the note. If the item is a file in the note folder and is not attached to another note, users will be asked later (when the note window is closed) if they wish to delete it.

Pads

Sending notes to other users

1. Select some or all of the note symbols.
2. Click the toolbar Send button.
3. Ensure all of the notes to be sent are selected and click the dialog's Send button.

The selected notes are wrapped up in a pad (.ecx extension) and attached to a new email. A message is included to tell the recipient how to open the pad. All you have to do is fill in the To: address and send the email.

Receiving notes from other users

If you receive a pad as an attachment to an email, you can see the notes in it by opening the pad from the publication. For Outlook Express, and Outlook, drag the pad to the publication or the drag-on. For Eudora, select the pad file name in the "Attached:" line, copy it to the clipboard (Ctrl+C), use the publication's Pad/Open command, paste the filename (Ctrl+V) into the "File name:" box and click Open.

You can download pads from the web. Enter the URL of the pad into your web browser or click on a link to the pad and when prompted to open or save the pad, choose save and write down the destination folder. After the download is finished use the publication's Pad/Open command, navigate to the destination folder, select the pad, and click Open.

Working with pads

To create a pad:

1. Select some or all of the note symbols.
2. Click the Pad button and select New.
3. Ensure all of the notes to be copied to the pad are selected and click the Save As button.
4. Choose a file name and click Save.

After the pad has been saved, you are asked if you want to open it.

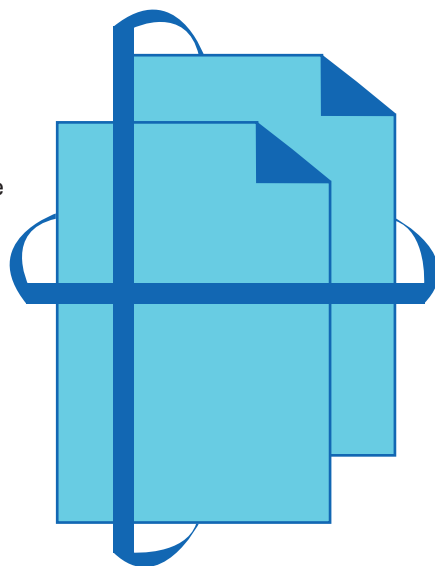
While a pad is open all of the notes in the pad are displayed and their symbols appear in green.

If you open the pad you are also prompted to allow your notes to be moved to the pad.



If you don't do this you will see a yellow note symbol for the original notes overlapping a green note symbol for each note in the pad.

To hide all notes in a pad, select one of the notes in the pad, choose the Pad/Hide command, and click Hide.

To display the notes again, choose the Pad/Show command, select the pad from the list and click Show.



To edit a note in a pad, make the desired changes to the note and then save the pad. After the note has been changed, (for example by dragging it to a new location, altering the text, or changing the item list), the modified note appears as an additional green note symbol with a red border. The original note is still present. You can save the pad to incorporate the changes or delete the modified note to discard the changes. If you have modified several notes and need to discard them all, you can use the Pad/Discard Changes command.

To add a note to a pad, ensure the pad is open (Pad/Show), open the note, choose the Actions/Attach command, select the pad, click Attach and then Update. The note symbol will change to green  with a red border . Save the pad (Pad/Accept Changes) to add the note or open the note and detach the pad to discard the changes.

To make a private copy of all notes in a pad, use the Pad/Make Private Copy command.



To make a private copy of one of the notes in a pad, open the note, ensure that the pad is selected in the item list, and choose the Action/Detach command and then click Edit.

To review the notes in a pad, use the Pad/Open Note command and double-click one of the pads. A list of notes in that pad is displayed. Double-click one of the notes to open it and jump to its location. If you select one of the note symbols in the pad before using the Pad/Open Note command, that pad will be pre-selected so that you can just click the Open Note button to find the other notes in the pad.

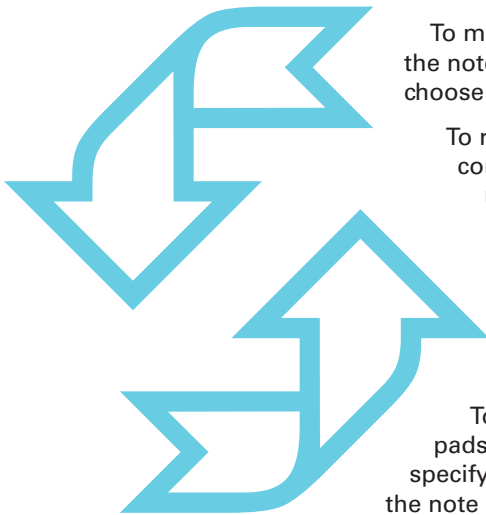
To maintain a copy of a private note in several pads, use the Pad/New command to create the pads, specifying the private note each time, and ensuring that the note is copied rather than moved. The private note symbol will now be yellow with a red border. Later when the note is updated, select the note symbol, and choose the Pad/Accept Changes command and click Save to update all the pads containing a copy of that note.

Pad updates and pad states (i.e. hidden, or shown) are maintained from one session to the next.

Sharing notes with other users







You can share some of your notes with other users of your computer. If your publication is installed on a network you can also share notes with other users on that network. If the notes are in a personal pad you can share them immediately. If they are not in a pad, use the Pad/New command to copy or move the notes to a personal pad first. Select one of the notes in the pad and then choose the Pad/Share command and click Share. Your personal pad will be hidden and then the public copy is displayed. The note symbols will change from green  to blue  and will be visible to other users of your computer and to network users. Public pads can be hidden, shown and updated like personal pads. All users are notified when one of these events occurs via a message in the status bar.

To stop sharing a pad with other users, select one of the notes in the pad and use the Pad/Retract command. This will make a personal copy of the public pad and then delete the public pad.



Network administrators may restrict access to the public pad folder in order to control who can manipulate public pads.

Table of note symbols

	Private note
	Note in a personal pad
	Note in a public pad
	Note update for personal pad
	Note update for public pad
	Note update for several pads

WORD PROCESSING FEATURES

Can I copy, cut and paste, and print?

Yes. We have provided the standard Windows functions. To select material you click the mouse at the start and drag it to the end, or click at the start of the material and shift-click to the end. Once selected, material can be printed, copied to the clipboard, or dragged into another application.

You can copy to the clipboard by selecting Edit/Copy, by clicking the copy button on the tool bar, by pressing Ctrl+C, or by dragging material to the Copy Button. Experiment and choose the method that suits your personal style best.

Can I drag and drop?

Drag and drop is actually more than a word processing feature - and we think it is one you will find very useful.

To drag an object first select it and then press the left mouse button and, still holding the button down, move the object. You release the object by letting go of the button.

During the drag keep an eye on the bottom of the window where you will see the effect of dropping the item. If the effect of dropping the item is not what you want you can use Shift to force the movement of an item, you can use Ctrl to force the copying of an item, and Alt to toggle between searching and not searching. Using Ctrl+Shift makes objects attach rather than copy.

Do be careful using Word – material dragged from Word is automatically treated as a ‘move’ and not a ‘copy’ request. Use Ctrl to force a copy so that material is not deleted from the Word document.

You can drag text in the search box, and text, graphics and note symbols from the right frame and list box items. And you can drop them into various places on the toolbar, left and right hand frames, and onto other applications.

When you paste it is most likely that all formatting will be retained. If your application does not support Rich Text Format then material will still be pasted - but in text format only.



SECURITY

Can I change the text?

No. One of the strengths of our platform is that you can always be sure you are examining the text as originally provided.



THE DRAG-ON ICON

The Drag-on Icon

The drag-on is an icon which floats on your desktop to give you instant access to this publication. You can click on it to display the main window and it remains on screen after you close the main window.

You can drag and a phrase from most applications (including this one) onto the drag-on to search the publication for that phrase. The main window will be displayed with a green dot alongside each document containing the phrase. Click a green dot to go to the first occurrence of the phrase in that document and then click the search forward button to find the next occurrence.

If you just want to see whether this publication contains a phrase or not you can drag the phrase over the drag-on and leave it there. The tip will soon tell you how many matches there are and then you can either drop the phrase to review the matches, or click the right button to cancel the drag.

You can change the size of the drag-on by right-clicking it to bring up the drag-on menu.

To close both the drag-on and the main window use Exit on the drag-on's menu or File/Exit.

The drag-on and/or main window can be displayed automatically when you login. To control this behaviour use the File/Open at Login command.

The Drag-on menu

Main Window	Toggles the main window on or off.
Drag-on	Toggles the drag-on off. Use the View/Drag-on command to toggle it back on.
Small	Changes the drag-on to a small size.
Medium	Changes the drag-on to a medium size.
Large	Changes the drag-on to a large size.
Open at Login	Displays a menu to control whether the drag-on and/or main window is displayed when you login.
Exit	Closes the main window and removes the drag-on.

THE MENUS

File:

Open at Login	Displays a menu to allow you to choose whether the main window and/or the drag-on is displayed automatically after you login. When the All Users option is ticked, the other users of your computer are either also opening the main window or drag-on at login, or they will be offered that choice when they next login.
Print	Prints the current document or selection.
Print Preview	Shows how the current document or selection will appear when printed.
Printer Setup	Displays the standard printer dialog box.
Send	Send notes or pads via email.
Contents	Returns to the master table of contents.
Backtrack	Returns to the previous display.
Exit	Exits the publication.

Edit:

Cut	Moves selected notes to the Windows clipboard.
Copy	Copies current selection to the Windows clipboard. See "Copying text" for more information.
Copy All	Copies entire document to the clipboard.
Paste	Notes on the Windows clipboard are attached at the current location. Text (or files) on the clipboard are attached as a new note. Any selected notes are replaced.
Del	Detaches selected notes.

View:

Zoom	Displays a dialog box for entering the zoom or magnification of the left or right frames. You can also change the magnification by holding down the Ctrl key and using the mouse wheel.
Prune	Toggles the automatic expansion and contraction (pruning) of the tree in the left frame on and off.
Caret	Toggles the keyboard cursor in the right frame on and off.
Drag-on	Toggles the drag-on on and off
Drag-on Size	Displays a menu to allow the size of the drag-on to be changed.
Hit Count	Displays a menu to allow the detail in the hit counts to be altered.
Automatic	Toggles the automatic selection of the hit count detail on and off. When on and the left frame is wide, more detail is included. As the width of the left frame is reduced, detail is omitted, first the local hit count and then the document count is left out. If you toggle this off, you can use the following options to specify exactly what is displayed.
Document Count	Toggles whether the number of matching documents is included in the hit count or not.

Local Count Toggles whether the number of local matches is included in the hit count or not.

For example if a document contains three matches, but has four subdocuments, with one match in each one., then the total number of matches is seven and the number of local matches is three. The number of matching documents is five and the full hit count reads, "7 in 5 docs, 3"

Search:

Specify Search Displays a dialog box for entering search terms.

Search Forward Searches from the current position to the end of the document.

Search Backward Searches from the current position to the start of the document.

Search Publication Searches throughout the publication and places a green dot in the left hand frame alongside each matching document.

Stop Searching Stops the current search.

Clear Search Clears the search box and removes highlights from matched text.

Pad:

New A list of all notes is presented. Those selected by the user are saved to a pad and the pad is opened. The user is asked whether the original notes should be retained.

Open A file open dialog is displayed. The pad selected by the user is copied to the pad folder and then opened.

Show A list of personal and public pads is presented. Those selected by the user are opened as personal pads.

Hide A list of all open pads is displayed. The selected pads are closed.

Open Note A list of all open pads is displayed. After the user picks one of the pads, a list of notes in the pad is presented. The note picked by the user is opened.

Accept changes A list of all open pads is displayed. The selected pads are saved. Any updates for the selected pads are applied. To apply an update, that pad must be open.

Discard changes A list of all pad updates is displayed. The selected pad updates are discarded.

Copy A list of all pads is presented. Those selected by the user are copied to the clipboard.

Send A list of all pads is presented. Those selected by the user are sent via email.

Share A list of all personal pads is displayed. The selected pads are published.

Retract A list of all public pads is displayed. The selected pads are retracted.

Make Private Copy	A list of all open pads is displayed. A private copy is made of all of the notes in all of the selected pads.
Delete	A list of all pads is displayed. Selected pads are deleted.
Note:	
New	Creates a new note and attaches it to the current location.
Attach	A list of all notes is presented. Those selected by the user are attached to the current location.
Attach Copy	A list of all notes is presented. A copy of those selected by the user is attached to the current location.
Open	A list of all notes is displayed. Double-click on one to display the full text of the note and a list of items attached to it. If the note is attached to several places, the user is asked to choose one. Changes may be made to the note. If the note is attached at more than one place, the user is asked if they want to update all occurrences or only this one.
Open Neighbour	A list of all notes attached to the current document is displayed. Double-click on one to edit it.
Open in Pad	A list of all open pads is displayed. After the user picks one of the pads, a list of notes in the pad is presented. The note picked by the user is opened. (This is equivalent to the Pad/Locate Note command.)
Locate Item	A list of all note items is displayed. Double click on one of the items to display a list of all the notes that the item is attached to. Double click on one of the notes to open it and jump to the location where the note is attached.
Copy	A list of all notes is presented. Those selected by the user are copied to the clipboard.
Send	A list of all notes is presented. Those selected by the user are sent via email. The user can choose to send the notes in a pad or as text. The advantage of sending a pad is that location of the notes is preserved.
Accept Move	A list of all note symbols in the current document which have moved during an upgrade process is presented. The state of those selected by the user is set to unmoved, so they are no longer displayed in red.
Move	A list of all notes attached to the current document is presented. The symbols for those selected by the user are moved to the current location.
Detach	A list of all notes attached to the current document is presented and those selected by the user are detached from the document. If a note is not the attached somewhere else then the user is asked if they want to delete it.
Delete	A list of all notes is displayed. Double click on one of the notes to delete it.
Status	Displays the location of the user's personal note folder and the public note folder.

Help:

Contents	Displays this document. The user may also press F1.
Navigation	Displays the Navigation Quick Start dialog. This dialog may remain on screen while the publication is used. It may be dragged to a different location but is automatically repositioned whenever the main window is resized or moved. The user may close it by clicking the cross button in the top right hand corner.
About	Displays information about the publication and the publisher, including links to their websites.

The Keyboard Cursor

When the publication is first installed the keyboard cursor for the right frame is turned off.

Visually-impaired users and those users who prefer to work with the keyboard rather than the mouse should toggle the caret on by using the View command.

The cursor can also be toggled on and off with the Scroll Lock key.

Note that the cursor is only displayed when the right frame is active.

To make the right frame active, click in the right frame or when the main window is active press the Tab key to activate the following parts of the main window, the search box, zoom control, left frame and right frame in sequence. Press Shift+Tab to reverse the order of activation.

To activate the main window when the Navigation Quick start is active, click the main window or press Ctrl+Tab to cycle through the Navigation Quick Start, the multiple note selection dialog, the drag-on and the main window.

Press Ctrl+Shift+Tab to reverse the order of activation.

To move by words, press Ctrl+LeftArrow and Ctrl+RightArrow.

To move by paragraphs, press Ctrl+UpArrow and Ctrl+DownArrow.

To move one screen at a time, press PageUp and PageDown.

To move to the beginning or end of a line, press Home or End.

To move to the beginning or end of the document, press Ctrl+Home or Ctrl+End.

To select text and graphics, hold the Shift key down while pressing the cursor keys.

You can also select material by clicking at the start of the material and then holding the Shift key down while clicking at the end of the material.

To follow a hyperlink, position the caret in a hyperlink and press Enter.

To backtrack from the hyperlink, press Esc.

When a note symbol is selected, you can open it by pressing Enter.

When some text is selected, you can search the publication for it by pressing Enter.

If there is no selection, pressing Enter searches the publication for the word nearest the caret.



The following are the main differences in operation arising from the presence of the caret:

- When the caret is on, the UpArrow and DownArrow keys move the caret, and the screen only scrolls when the caret reaches the top or bottom of the screen. When the caret is off, the keys scroll the display immediately.
- When the caret is on, *Search Forward/Backward* move the caret from one matching word to the next, while when it is off they move the display from one matching paragraph to the next.

eComPress Technology

The Tax Summary uses the RTF eComPress Electronic Publishing System, a revolutionary new way of publishing large reference documents with guaranteed data integrity in a format which occupies a small amount of disk space. The RTF eComPress System takes RTF (Rich Text Format) documents (compatible with most leading word-processors) and compresses them to a fraction of their original size while maintaining the full integrity of the file and providing rapid search facilities with every single word and number indexed! There is no need to provide and maintain a "keyword" list or to strip the document down to plain text so that other programs can index it. The RTF eComPress Electronic Publishing System indexes files intact, quickly and easily. The resulting file can be distributed with absolute certainty that it is identical to the original and ***cannot be modified in any electronic form.***