



# **InTRA**

**TAX AND ACCOUNTING RESEARCH ASSISTANT**

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## **Quick Reference Card**

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When it comes to tax research,  
getting there isn't half the fun.  
InTRA shortens the trip.

[www.accountant.intuit.ca/intra](http://www.accountant.intuit.ca/intra)

## Finding answers in InTRA

InTRA Commentary is an ideal starting point for all your research. The Commentary offers expert, easy-to-understand interpretation of tax issues. At the end of each Commentary topic, you'll find links to source documents or related topics.

Here's are other ways to research with InTRA.

1. **Right-click from a form in Profile.** Jump directly to the InTRA Commentary related to that form.
2. **Search.** Type in any search term to see a list of matching, relevant and conveniently organized topics.
3. **Jump from the Toolbar.** From the Jump to Toolbar, choose publication type: Guide, Interpretation Bulletin (IT), or Information Circular (IC). Premier and Enterprise licenses also include the *Income Tax Act* (ITA) and/or the *Excise Tax Act* (ETA). Type the publication number, ITA section or ETA section (for example, "4002" or "T4002" for the Business and Professional Income Guide), and click Go.
4. **Browse InTRA.** The table of contents and lists of related topics make it easy to find your way around.



### Colours are signposts

Links are colour-coded for ultra-fast navigation. Links to [Commentary](#) topics are [blue](#); links to the [Income Tax Act](#), [Income Tax Regulations](#) and the [Excise Tax Act](#) are [green](#); links to [CRA guides and pamphlets](#) are [pink](#), and links to other types of publications like [ITs](#) and [ICs](#) are [orange](#). In searches, [bold green](#) are the [most relevant results](#) and [bold black](#) are the [next relevant results](#).

### Track your research

InTRA offers many options to ensure it's easy to return to topics you found previously.

- Within a single work session (the time that InTRA is open on your desktop), the History tab tracks every document topic you have opened in the Viewer. Use the History tab to quickly recall earlier reading.
- Between sessions, use Bookmarks and Research Cases to mark topics you plan to revisit later, or share with members of your team.

## Install InTRA

1. Insert the InTRA CD into your CD-ROM drive. The install program should launch automatically. If not, browse the CD contents in Windows® Explorer and double-click the InTRAIInstall.exe file.
2. Follow the instructions as they appear on the screen.
3. When you see the prompt for license information, enter the InTRA license code exactly as it appears in the letter you received with your CD.

Please visit [www.accountant.intuit.ca/intra](http://www.accountant.intuit.ca/intra) to read the system requirements to run InTRA.

## Updates

Throughout your InTRA subscription period, you are entitled to software updates. Depending on the option your InTRA updates will be:

1. Downloads from [www.accountant.intuit.ca](http://www.accountant.intuit.ca) when we announce a new release. Use the Automatic Check for Updates feature to keep InTRA current. Select **Tools > Check for updates** from the InTRA menu. The program checks our website for the latest version, downloads any available update, and prompts you to install it on your computer.
2. CD shipments (following shortly after each new web release announcement).

## Further information

For more information about InTRA:

- Select Contents from the InTRA Help menu.
- Visit us online at [www.accountant.intuit.ca/intra](http://www.accountant.intuit.ca/intra).
- Contact our Support team. On [www.accountant.intuit.ca](http://www.accountant.intuit.ca) choose **Support > InTRA**.

## Options

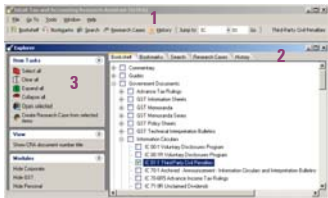
Select **Tools > Options** from the InTRA menu to select your preferences.

- By default, InTRA opens each selected topic in the same viewer window, replacing your previous topic selection and keeping open windows to a minimum. You can choose to open a new window for each topic you select.
- Folder options allow you to store your Research Cases and InTRA documents in the location you prefer. For example, you may want to store these files on a server to share across a network.
- Check for Updates determines how often InTRA will check our website for updates.

# Explorer

The InTRA Menu and Toolbar (1), Explorer (2) and Task panel (3) give you access to all the InTRA features and materials. You can resize and move the Toolbar and the Explorer separately to create a desktop that works for you.

When you select from the Explorer, topics open in the Viewer.



InTRA Menu, Toolbar and Explorer

## Task panel

The InTRA Task panel (on the left side of the Explorer) is dynamic. The options and links you see on the Task panel relate to your cursor position on the Explorer tabs to the right. If you have multiple applications in the InTRA Suite, you can show and hide those different document collections from the Task panel

## Bookshelf

The Explorer Bookshelf tab lists all the resources included in InTRA. Click the +/- indicators to show or hide sub-topics. Use the arrow keys (up, down, right and left) to move through the list.

## Bookmarks and Annotations

If you want to return to a particular InTRA topic later, add a bookmark to the topic. Open the topic in the Viewer and right-click anywhere in the text to add your bookmark. On the Bookmark tab, click a bookmark to jump to that location. Or right-click a bookmark on the Bookmark tab to rename or delete it. An annotation is a bookmark with comments associated. Use annotations to track your observations about topics you flag in InTRA.

## Research Cases

A research case is a group of topics you have selected and saved under a research case name. To select a topic for a research case, right-click on the topic as you are reading in the Viewer and select "Add to research case". You can create a new research case, or add the topic to a research case created previously.

You can also create a research case directly from the Explorer Bookshelf. Just select the checkboxes to the left of the topics you would like to include in your research case. Click the Task panel option, "Create Research Case from selected items?"

## History

The Explorer History tab lists all the topics you have opened in the Viewer during the current session (since you last launched InTRA). The History tab clears when you close InTRA.

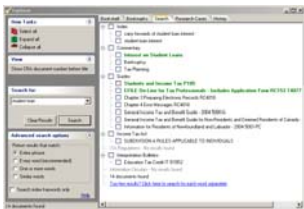
## Search

When you select the Search tab, the Task Panel shows search fields. On the Search tab, you'll see the results of your latest search.

Improve your search results by clicking the one-click suggestions at the end of the list of relevant topics. These suggestions automatically adjust the Advanced search options on the Task panel.

If you select to search only the index keywords, your search results will include only topics from the InTRA Commentary.

You can, of course, drill down from those topics to the source or related government documents. To search for variations on words, use a **wildcard character** in your search. The asterisk (\*) can stand in place of one or more unspecified characters. For acquisition and acquired, type *acqui\**. Use a question mark for a single character. To find acquired or acquires, type *acquire?*



Search tab and Task panel search options

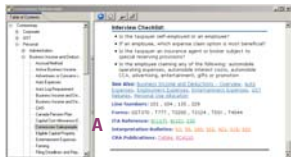
## Viewer

InTRA topics you select from the Explorer display in the Viewer with a Table of Contents (and, when relevant, a Related Topics tab) to the left. You can hide or show the Table of Contents by clicking the dotted vertical line to the left of the document (A).

To open each topic you select in a new Viewer, go to **Tools > Options** and select "Open a new viewer..."

At the end of a Commentary topic, look for related references and forms, or handy interview checklists you can use with your clients.

Right-click on topics in the Viewer to add a bookmark or annotation, or to include the topic in a research case for future reference.



Links from Commentary in the Viewer

## Reading the *Income Tax Act* and the *Excise Tax Act*

InTRA Premier and Enterprise versions provide the ITA and ETA, including sections that are scheduled to be repealed in the future as well as the transition rules for those sections. At the top of the repealed section, a note in red lists the legislation by which the section was repealed and when this goes into effect. Scroll to the bottom of the same section to see the transition rules for the repealed section. Transition rules appear in green.

## Keyboard Shortcuts

Action	Keystroke	Action	Keystroke
Search documents	<F3>	Jump to IT	<Ctrl+B>
Go To Bookshelf	<F4>	Jump to ETA section	<Ctrl+E>
Go To Bookmarks	<F5>	Jump to Guides	<Ctrl+G>
Go To Research Cases	<F6>	Jump to ITA section	<Ctrl+I>
Go To History	<F7>	Jump to toolbar	<Ctrl+J>
Backtrack in Viewer	<Alt+LeftArrow>	Jump to IC	<Ctrl+N>
Forward in Viewer	<Alt+RightArrow>	Close viewer	<Esc>

\*InTRA also supports standard Windows® shortcuts

Right-click on a form in ProFile to jump to a related topic in InTRA



Use arrow keys to navigate the table of contents

- Up and down keys move up and down the list
- Right arrow key expands the subtopics
- Left arrow key collapses the subtopics
- <Enter> opens a topic

### Mailing Address

Intuit Greenpoint  
Suite 400, 138 - 4th Ave SE  
Calgary, AB, Canada T2G 4Z6

### Website Address

[www.accountant.intuit.ca/intra](http://www.accountant.intuit.ca/intra)

### Contact Support

[www.accountant.intuit.ca](http://www.accountant.intuit.ca) > Support > InTRA

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