Audit Insight
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Overview

Audit manuals set out the policies and procedures that state auditors must follow when interacting with taxpayers.

Tax Analysts has collected these manuals – through FOIA requests, in several cases – and we’ve added tools to help you use these effectively in your practice.

What Do You Want to Do?

- Contact a state audit official
- Get audit-related news
- Find a topic in a state’s audit manual
- Compare audit manual texts
- Highlight, annotate, or save text
- Get help
- Go back to a section of text that you’ve highlighted or made notes on
- Filter notes using tags
- Print / download text excerpts, including Notes
- Email text excerpts and your notes
State Dashboard: Officials’ Contact Information / News

Your Audit Insight platform includes important state audit-related information in addition to the manuals themselves.

From the Audit Insight landing page, click on the name of a state (1) to open the state’s dashboard.

From the dashboard, you’ll see the contact information for the state’s revenue authorities (2), and audit-related news (3).

Opening the Workbench (4) from the state landing page will allow you to see all text snippets and notes made to that state's audit manuals.
Reading and Searching in Audit Manuals

From the Audit Insight landing page, the audit manuals you've purchased will appear under the header **My Other Available Insights** (1).

Click on the **star** (2) to move an audit manual into your Favorites.

Click on the **down arrow** (3) to see the material available for that state. Once you've expanded the contents, you'll be able to open a specific type of manual (4).

Click on an **underlined title** (5) to open the manual.
With the manual open, you can:

- Enter terms in the SEARCH field (1)
  (Move the radio button (2) to search either the document text or the Table of Contents)
- Toggle to the table of contents (3)
- Compare the manual section with a different state's manual or to another section of the same manual (4)
Comparing Two Manuals

With a document open, go to the right pane and click the button for Select Your Document. (1)

The states for which you've purchased materials will appear in a list. Use the down arrow (2) to see the manuals for a particular state.

Click on the underlined title (3) to select the manual you'll use in your comparison.
To find terms in the manuals, enter the term in the box (1).

Use the radio button (2) to select either the document text or the table of contents for your search, then click the SEARCH button (3).

The term will appear in orange highlights (4) in both manuals.

A counter (5) in each manual will show you how many times the term appears, and will let you move between instances of your term.

Highlighting, Annotating, or Saving Text
(Note that text that you've highlighted or added notes to will be stored in your Workbench.)

To work with a section from the manual, open it, and click on a paragraph. A gray outline will appear around the paragraph and you'll see a tool menu to the right of the selection.

To highlight the text, click the star (1).

To make a note on the text, click on the pencil (2).

To copy the selection to the clipboard, click on the copy icon (3).

To close out of the selection, click the X (4).
Adding Notes to the Text

When you click the pencil, a note field will appear. Enter your note in the box (1).

Note you may copy/paste text from a manual into a note. This may be particularly useful if you’ve found contrary analysis of your topic in a different manual (see Comparing Two Manuals).

Be sure to save your note (2). Saved notes will be stored in your Workbench.

After you’ve saved the first note, you can add another note (3) to the same excerpt of text. The note may be for another client or matter. As long as you tag the notes, they'll be stored separately – and you can retrieve them separately – from the Workbench.

Adding Tags to Your Notes

You may want to add a tag to your note so that when you go back to the text you can remember why you wanted to save it. Tags can be used to search for and retrieve snippets of text that you've annotated.

You can add as many tags to a section of text as you like. (You can tag text as pertaining both to a client and to a topic, for example.)

Your tags will be visible when you print, download, or email your text excerpts and notes (see printing / downloading and emailing, below); consider this when “naming” your tags.
If you’ve previously created an appropriate tag, you can **check a box (1)** and add it to your note. Or, you can **create a new tag (2)**.

When you’re finished, **save your note (3)**. The section of text with your note will go to your Workbench.
Editing Notes or Tags

To edit a note or to change its tags, retrieve it from the Workbench.

You can open your Workbench from the top right of your screen. (1) (See the note below about the different views of the Workbench.)

In the alternative, you can also edit a note by going back to the manual, and clicking the green pencil (2) at the bottom of the text you've annotated.

Click on the pencil icon (3) to edit the note (4).

The tags associated with your note (5) will appear at the left.

You can create a new tag (6) for your note.

The Manage Tags feature (7) allows you to edit the names of your tags, delete tags, or create a new tag.

Save your changes (8) before closing out of the note.

If you prefer, you can delete a note entirely by clicking on the trash can icon (9).
Going Back to Saved Sections of Text, Your Highlights, or Notes (Workbench)

Your Workbench holds highlighted text excerpts and text excerpts with notes. Open your Workbench from the top right of your screen.

Different Views of the Workbench

When you click the Workbench icon from the top right, what you'll see depends on where you are in the Audit Insights platform:

- If you begin from the main landing page, you'll see all notes you've made in any manual in your collection.

- If you begin on a state's landing page – with a state's name (1) in the title bar – you'll see all notes you've made in any manual from that state.

- Finally, if you begin from an individual manual (you'll see the text of the manual in the main pane and the title of the manual (2) at the top left), you'll see all notes you've made in that manual, only.
Once you’re in the Workbench, you can search the text snippets you’ve saved, search your notes, or search both. You can also re-sort the excerpts.

Enter search terms in the box (1).

Check the box(es) (2) to search highlighted text excerpts, your notes, or both.

Text excerpts are displayed in order of newest first; you can use the orange drop-down arrow (3) to change the order.

Using Tags to Filter Notes

Using the Filter Tags feature (4), you can bring up only the text excerpts with certain tags.

You can search for key words (5) in your tags.

Use the Manage Tags feature (6) to add, delete, or edit your tags.
Prin�ng / Downloading Excerpts, Including Your Notes

You can print text snippets – including your notes on them – using the Export function in the Workbench.

Starting from the appropriate landing page (see Different Views of the Workbench) open your Workbench.

To be certain you don’t inadvertently compromise confidentiality when you print or download notes, use the tags filter (1) to select only the relevant material.

Consider whether you want to print or download your highlights, your notes, or both. As a default, both will be gathered; uncheck the box (2) to omit a category.

You may want to re-order the snippets before printing or downloading. Use the Sorting Tool (3) to re-order. Finally, select Export (4).

After you select Export, a dialog box (5) will appear. Click on the icons to Print or Download PDF (6).
Sharing Excerpts – Including Your Notes – by Email

You can share text snippets and your notes by e-mail, using the Export function in your Workbench.

Start on the appropriate landing page (see Different Views of the Workbench) to capture all the relevant notes.

Use caution to gather only the excerpts and notes you intend to send. Use the tags filter (1) to exclude all other material. (Note: Snippets that you’ve cross-tagged will be included in both sets of filter results – for Tag 1 and Tag 2.)

You might use the Sorting feature (2) to re-order the notes.

Select Export (3), and a dialog box will appear.

Check the box (4) if you’d like to send your excerpts and notes as a .pdf – otherwise the material will appear in the body of the email.

Enter an email address (5) (you may enter only one address at a time).

If you wish, you may include a message in the lower box (6). Including a message is optional.

Then, click SEND (7).

For Help, or to Give Feedback

Please go to www.taxnotes.com/support.