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Tax Research Applications

Tax Analysts offers a variety of tax research options, including CD, DVD and web-based research systems. The vendor's OneDisc Premium DVD is a comprehensive collection of the vendor's tax research resources, containing the Complete Federal Research Library, which has the entire Internal Revenue Code and Manual and all standard tax documents, along with more than 100,000 tax cases and U.S. Tax Treaties, with customizable search and history functions. Subscriptions to the web-based system provide users with access to all of the same primary source materials as the DVD versions, as well as exclusive online offerings such as Tax Notes, Tax Notes Today and a related state tax journal, and State Tax Notes. Annual subscription costs for the various programs are as follows: OneDisc costs \$109 with quarterly updates, \$139 with monthly updates; OneDisc Premium is \$339 for quarterly, \$359 monthly; Web Services is \$366 annually. This review primarily focuses on the vendor's web-based offerings.

Joseph B. Mansour, CPA, of the Mansour Consulting CPA Firm, LLC (www.mansourcpa.com)

in West Chester, Ohio, appreciates the ability to keep up to date with the tax laws, as well as the ability to quickly find answers to tax research with OneDisc. Mansour selected this program because it contains the Internal Revenue Manual and the historical court cases. He recommends that new or potential users "get the OneDisc, read current events and learn how to research the OneDisc as it is easy to find hits on any major tax research issue."

EASE-OF-USE/SEARCH ROUTINE – 4 Stars

Tax Analysts' Web Services options are accessed from the vendor's web site, which provides a split-screen web interface offering a list of available

(subscribed to) research libraries in a menu on the left side of the screen,

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The interface also provides additional options for accessing help, user

preferences/profile,

and going to the Tax Analysts homepage.

Search functions vary depending upon the content library selected, with various options including searching by keyword, phrases, code numbers, sections, chapters and other variables, as well as the ability to search multiple libraries. When performing searches of documents, the system shows results as a list of hits with links to the actual document (similar to a Google search), which opens within the same window. The system does not intuitively display the location of the searched for phrase within the full text of a document, which could be a challenge with longer documents. To locate keywords, users can, however, employ their browser's Find function. Although very thorough in its search capabilities, the system does not offer an instant search function from the main screen. Instead, a library and subsection (depending upon library) must first be selected. Search assistance is provided through the Help Guide. The vendor's OneDisc programs offer additional search options. (The company noted that a "significantly enhanced" version of the online system will be launched in early 2006, with improved search functions and increases in libraries.)

CONTENT – 5 Stars

Virtually all of the tax code and research materials available through Tax Analysts are available through its Web Services options as individual subscriptions, allowing users to select only the libraries needed by their practice. In addition to the Internal Revenue Manual and Code, users can access final, temporary and proposed tax regulations, federal and state court rulings, IRS Letter Rulings, revenue procedures and rulings, directories, IRS announcements and notices, new tax legislation, and Tax Analysts' Federal Tax Baedeker explanations of tax rules. Also available only through online subscriptions is the vendor's Tax Notes Today, which provides commentary and analysis by tax experts, as well

as daily updates on rulings, procedures, regs, proposals, hearing transcripts,

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configurable, allowing users to set up and save queries that comb through the Tax Notes Today content each day, e-mailing only desired content to them. The OneDisc versions of the program offer greater search flexibility and customization options than the web-based system.

INTEGRATION/OUTPUT – 3 Stars

Tax Analysts' Web Services research libraries do not integrate directly with any tax preparation systems, although traditional copy and paste functions should allow most users to transfer data without too much difficulty. The online system prints through the web browser's print utility, which offers very little content-specific print options.

SUPPORT & UPDATES – 5 Stars

The web-based system offers a strong Help system that provides search instructions as well as limited content-specific assistance. As a web-based program, the libraries are updated by the vendor as needed, relieving the user of this duty while ensuring an always up-to-date collection of resources. Updates for the OneDisc versions depend upon subscription, with quarterly and monthly updates available.

SUMMARY

The research libraries available through Tax Analysts' Web Services offer a thorough collection of primary source documents such as code, regs, rulings and procedures, with search functions that are adequate but would benefit from more user control, history and the ability to save searches. The Tax Notes Today option, however, is a remarkably valuable and versatile research tool, allowing specific filtering of content. I'm looking forward to the revamped version of the web version, which should be launched soon.

2006 Overall Rating – 4 Stars

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