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*From the January-March 2007 [Review](#)  
of [Tax Research Systems](#)*

BNA Tax Management offers an online (reviewed [here](#)) as well as a CD-based version of its well-known Tax Management Library. Among its many offerings, the Tax Management Library includes the U.S. Income Portfolios; Estate, Gift and Trusts Portfolios; Foreign Income Portfolios; Tax Practice Series; and the Accounting Policy and Practice Series (the latter is a brand new offering). BNA is well known in legal and accounting circles for its "Portfolio approach."

The Portfolios are individual treatises offering comprehensive coverage on federal, state and foreign taxation and estate/gifts/trusts. Users of the online version also have access to optional components such as the Daily Tax Report. Tax Management

Library is available as a complete collection of all resources, or individual components of the Library may be selected. Tax Practice Series starts at \$870/year. The Portfolios Library starts at \$1,830/year.

**EASE-OF-USE/ SEARCH ROUTINE — 5 Stars**

The Tax Management Library is accessed through the Window's web browser (running Internet Explorer or Netscape). The main interface (Home) screen includes three individual Libraries: the Federal/Foreign Tax Library, the State Tax Library, and the Accounting Policy and Practice Library. Individual libraries are separated into categories (or areas) such as Expert Analysis, News and Developments, Journal Reports and Commentary, Primary Source, and Practice Tools.

Within each of these categories, sub-categories are listed and include text links directly to coverage. For example, Primary Sources under the Federal/Foreign Tax Library includes the Internal Revenue Code, Treasury Regulations, Federal

Tax Cases and Circular 230, to name a few. Expert Analysis includes the various

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users may utilize the search function defaults to perform a basic word search, access data via Global Search or conduct detailed queries through a Special Search that narrows the search to specific sections of documents. When not inside an individual library, users are presented with a blank search bar to enter a word or phrase as well as a search menu that consists of the main interface screen populated with check boxes. Users can select all documents if they wish to select everything for their search. The GoTo function provides a specific query function that enables users to go directly to a specific code section, regulation, court decision, citation, IRS Publication or specific portfolio. This is very direct! Tax Management Library search results show the areas searched along with the number of hits, providing access to the table of contents for a given search source as well as direct access to the selected document. The search queries are highlighted throughout selected documents, including the site and support links that may be selected via a simple click from within each document.

### **CONTENT — 5 Stars**

The Tax Management Library provides comprehensive coverage, including full text of the federal tax code, all state tax codes, income tax regulations, IRS publications and documents, the full text of federal cases since 1913, tax court opinions since 1942, tax treaties, legislation, and final, temporary and proposed regulations. In addition to these resources, the program includes more than 400 individual portfolios and approximately 300 tax practice chapters. The Tax Management Library

Portfolios are authored by more than 1,000 tax and legal practitioners and scholars.

Tax Management Library's Daily Tax Report provides an online news source that is tailored to tax concerns and provides detailed coverage of legislative, regulatory and legal developments with specialized sections on taxation, budget

and accounting, state taxes, and tax rulings and decisions. The Daily Tax Report

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also provides the user with the ability to receive Journal highlights via e-mail with linked summaries of articles.

### **CUSTOMIZATION — 4 Stars**

The program is limited in its query saving capabilities, as it saves only the last three searches that have been performed. It does not allow bookmarking of returned documents, and there is no support for user-defined automatic searching or filtering. Similarly, the interface provides users with very few customization options.

### **INTEGRATION/OUTPUT — 3 Stars**

As mentioned earlier, Tax Management Library includes the SuperForm comprehensive interactive tax forms. However, the interactive tax forms do not directly integrate or link to any third-party tax preparation systems. Tax Management Library users can copy and paste materials into other documents, and the system offers a variety of print options, including previewing, outputting or saving the document into \*.RTF or ASCII formats, or linking/printing to a Microsoft Word document.

### **HELP, SUPPORT & UPDATES — 4.5 Stars**

Tax Management Library includes very comprehensive built-in Help features, something that is often lacking in online systems. The Help function includes a fully searchable Help index, glossary, and specific pointers about common tasks such as searching, printing and using forms. The program's (left-hand) vertical navigation includes a user's guide and a tour of the product. As an online system, changes made by BNA Tax Management staff are constantly maintained and instantly updated so no user action is required.

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