

Setting Up Trackers

Tracker News is a customizable news delivery feature that alerts you of new tax developments on a daily basis. You can set up Tracker News searches specific to your areas of interest and have the results delivered to you via email or RSS feed – or you can view your Tracker News results within IntelliConnect. Whichever way you choose to view your daily Tracker News, IntelliConnect makes it easy to receive up-to-the-minute results of your Tracker News searches.

TIP: As opposed to jumbling all news topics of interest into one Tracker News request, categorize your Tracker news requests by topic by creating a separate Tracker News request for each topic, individually. You will find it to be a more efficient way to review your Tracker results (Figure 1).

TIP: If you wish to track a specific search term within the news released each day, the “Custom search terms” options will find only news documents from your chosen topics that include the custom search terms you add (Figure 2).



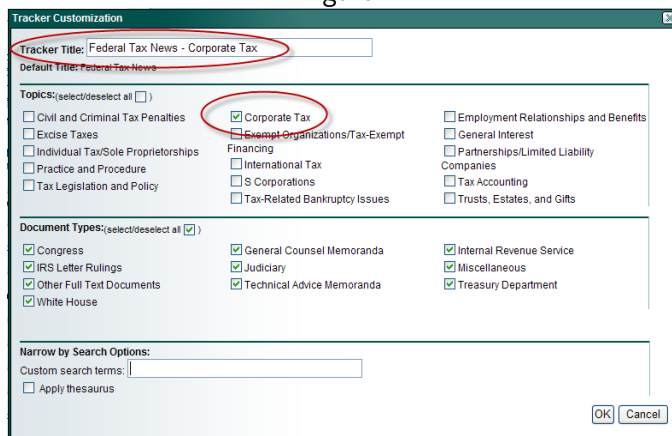
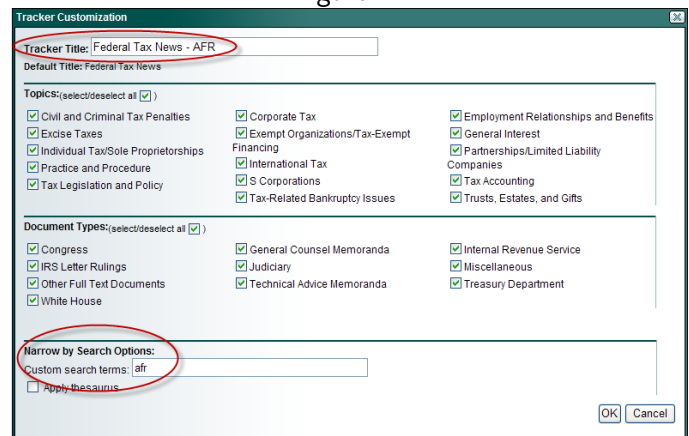
- Click on Tracker News within the Quick Bar.
- Click Add/Modify Trackers in the Tracker News pane.
- Click the Target icon  located to the left of any Trackers you want to add to customize the Tracker (i.e., Federal Tax News).
- When you click the Target  icon, the Tracker Customization dialog box for the selected Tracker displays.
- Click in the checkbox next to topic of interest you want to include in the Tracker (i.e., Corporate Tax).
- Click in the checkboxes next to any specific types of documents you want to include in the Tracker.
- Name the Tracker News search accordingly within the Tracker Title field (i.e., Federal Tax News – Corporate Tax).
- If you want to apply custom search terms to the Tracker, type the search terms in the Custom search terms field (i.e., AFR).
 - If you want to apply a thesaurus to the Tracker, click in the checkbox next to Apply thesaurus.
- Name the Tracker News search accordingly within the Tracker Title field (i.e., Federal Tax News – AFRs).
- Click OK.
- Click Add Tracker(s) at the bottom to start receiving your Tracker results.

Figure 1



The screenshot shows the 'Tracker Customization' dialog box. The 'Tracker Title' field is set to 'Federal Tax News - Corporate Tax'. The 'Default Title' is 'Federal Tax News'. Under 'TOPICS', 'Corporate Tax' is selected. Under 'Document Types', several options are selected, including 'Congress', 'IRS Letter Rulings', 'Other Full Text Documents', 'White House', 'General Counsel Memoranda', 'Judiciary', 'Technical Advice Memoranda', 'Internal Revenue Service', 'Miscellaneous', and 'Treasury Department'. The 'Narrow by Search Options' section is empty, and the 'Apply thesaurus' checkbox is unchecked.

Figure 2



The screenshot shows the 'Tracker Customization' dialog box. The 'Tracker Title' field is set to 'Federal Tax News - AFR'. The 'Default Title' is 'Federal Tax News'. Under 'TOPICS', all topics are selected. Under 'Document Types', all options are selected. The 'Narrow by Search Options' section has 'Custom search terms' set to 'afr'. The 'Apply thesaurus' checkbox is checked.