DATA TRANSMITTAL / SPECIFICATIONS

Product Type:	**Tax (TAX SMG)**
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Editorial Contact	**Charlane Vitez** **cc: Hellen Kerr**
Transmittal to Analysis	**March 17, 2021**
Size	**19 pages**
Electronic Files	**Y:\IMP-Conversion\public\Outsourcing-SGML\Data Analysis-Conversion\TAX\Federated_Press\FedPress-96**
Comment	**SUPPLIER:** • **In-line legislation sections, government documents linking required** • **INTERNALLINKING is required** • **Issue number should be placed in reverse chronological order (most recent issue at top of the file)** • **NOTE: Please see BLUE highlighted material for recent changes to the specs. Please ensure these requirements are captured for all files**
From	**Carol Wong**
Transmittal to Supplier	**March 17, 2021**
Graphics	**SUPPLIER**
Date Required	**March 23, 2021**

KEYING SPECIFICATIONS

SUPPLIER INSTRUCTIONS:

- In-line legislation sections, government documents linking required, see <u>Caret coding chart</u> below.
- Ignore any "stamped" information in the file. If in doubt, please query.
- Documents have been provided as PDF files for conversion. Use the PDF filename for the graphic link at the beginning of the <COMMENT>. **DO NOT** rename the PDF file. Capture the filename exactly as it appears in source.

  e.g.

  VOL_I_NO_1_1992.pdf → <GRAPHIC FILENAME=" VOL_I_NO_1_1992.pdf"> ← this will be the graphic
  link file in <COMMENT>

- Ignore copyright information at the end of the issue/document

Journal:
- Use <BOOKPART> for each Volume/No.
- <TI>: Main heading--<EM>…., e.g. <TI>Taxation of Executive Compensation and Retirement—<EM>*a journal devoted to the design of tax-effective compensation for executives*</EM></TI>
- Ignore the "Topical Summary" section.

Highlight/Introduction, Issues:
- Group the Highlight and issues in one <COMMENT> for each No. within <BOOKPART>
- <COMMENT><N> will be the volume and No., e.g. <N>Issue No. 4, (2018)
- <COMMENT> ID is required, compose the ID by: year_Vol. #_No. #

  e.g. **2018, Vol. XXI, No. 4** → <COMMENT ID="**2018_21_4**">

- <DATE> tag is required within the **<COMMENT> only**, i.e. Highlight/Introduction <COMMENT>. The <DATE> is composed of the document year found at the top right side of the first page. EG: <DATE>2018</DATE>

- Each <COMMENT> requires a <GRAPHIC> link at the beginning of the <COMMENT><FREEFORM>
    - Use the PDF filename for the graphic links e.g. CF_XXI_N4_2018.pdf → <GRAPHIC FILENAME="CF_XXI_N4_2018.pdf">

    - The Graphic <LINKTEXT> will be the year + Main title + Volume no. + No.

      e.g.

      <LINKTEXT>2018 Sales Tax, Customs & Trade, Volume XV, No. 4</LINKTEXT>
      <LINKTEXT>2018 Corporate Finance, Volume XXI, No. 4</LINKTEXT>

Editorial Board (flush left or at the bottom of the first page):
- The editorial board can be found at the bottom of the first page, flush left or even further down in the document. It should always be captured at the beginning of the file as shown in the sample.sgm file.
- ALWAYS capture the Board table with 4 columns. Each column should be set as 25 percent. The table heading should always be "Board" as shown in the sample file. Always surround in <EM> and ensure that the "Board" heading is centered across all 4 columns
- Add <?size 10> processing instruction before the Board table title. EG: **<TBLCELL COLSTART="2" COLSPAN="1" HALIGN="CENTER"><?size 10><EM>Board</EM></TBLCELL>**
- Set the size attribute to the contents of the table to <?size 7**>. EG: <TBLBODY TBLWD="600"><?size 7>**

- Ensure that the remainder of the material after the table is set as <?size 9>. After closing the table, please add the processing instruction. EG: **</TABLE></P><?size 9>**
- The size should only be added to the "Board" table at the beginning of each <COMMENT>. Do not add this attribute to any other tables within the file.
- Capture the authors' name in <AUTHOR> tags. Please use sample sgm file's table as a template for the "Board" tables.
  - **NEVER add the &newline; entity within the <AUTHOR></AUTHOR> tags. If needed, the entity must be placed AFTER closing </AUTHOR>:**

    Incorrect tagging
    <AUTHOR>
    <FIRSNAME>Lynne</FIRSNAME>&newline;
    <LASTNAME>Lacoursiére</LASTNAME>
    </AUTHOR>
    Correct tagging
    <AUTHOR>
    <FIRSNAME>Lynne</FIRSNAME>
    <LASTNAME>Lacoursiére</LASTNAME>
    </AUTHOR>&newline;
- DO NOT Capture the "Highlights" heading. A Mini Highlights TOC is no longer required.
- Capture the "Highlights" content and place **after** the Boards table in the sgml file.
- Use <P><BOLD><EM> for the highlights headings that appear in all uppercase letters.
  - **INTERNALLINK tagging must be added to the highlights headings.** Typically this heading will appear in all uppercase letters.
  - If the highlights sections do not contain headings in all uppercase letters, please add the linking to the article heading that is usually captured as <BLOCK2> (see **fp-samplefile.sgm** as a guide).
  - The INTERNALINK must be formatted as follows:
    - **ABBREV_COMMENT ID_BLOCK2<N>**
    - Each component is separated by an underscore
    - The ABBREV has been provided in the data inventory
    - The <COMMENT> ID is composed of the ID by: year_Vol. #_No. # (as shown in the tagging instructions above)
    - The BLOCK2 <N> must be assigned to the corresponding Highlights heading. For example, if there are two headings within the Highlights section, then two BLOCK <N> numbers must be assigned in numerical sequence to the full text further below.
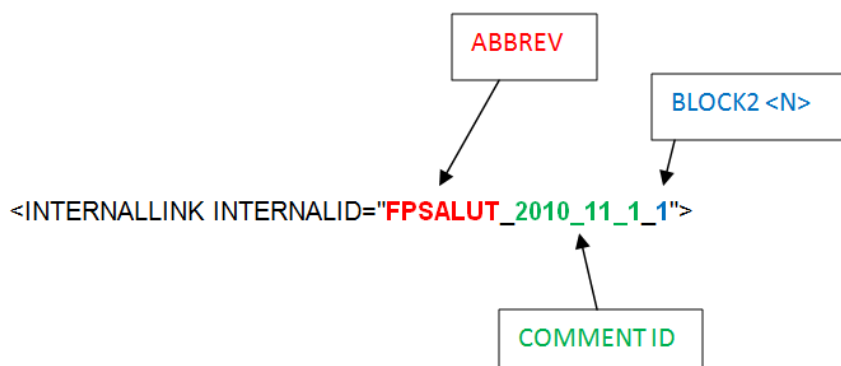   - **NEVER add caret coding to the content within <INTERNALLINK></INTERNALLINK>**
      Incorrect Tagging:
      <INTERNALLINK INTERNALID="FPTEC_2018_26_1_3">Recent CRA Interpretations of Interest: CRA Clarifies the Availability of the **^RSC1985c1s5 110(1.1)** Election in Cash-Out Scenarios</INTERNALLINK>
      Correct Tagging
      <INTERNALLINK INTERNALID="FPTEC_2018_26_1_3">Recent CRA Interpretations of Interest: CRA Clarifies the Availability of the **110(1.1)** Election in Cash-Out Scenarios</INTERNALLINK>
    - Eg:

- Use <BLOCK2> for flush left bold headings
- Use <FOOTNOTE> for the numbered footnotes. Footnote numbers must be keyed
- Use <CASEREF> tag for cases

Graphics:

- All graphics must be resized to 200. Please set the size attribute to "pagewidth,200"

  E.G.: <GRAPHIC FILENAME="TAXFEDP0003.BMP" SIZE="pagewidth,200">

  - The image should mimic the original. If the original image is in colour, then the .BMP will be in colour. If the original image is in black and white, then the .BMP will be in black and white.
  - **COLOUR IMAGES:**
    - **TWO** BMP files for each colored graphic image are to be provided. One image is to be scanned at 300 dpi. The second image is to be scanned at a reduced size of approximately 71 dpi.
    - assign the image scanned at 300 dpi a filename
    - assign the image scanned at 71 dpi the same filename, BUT include the word "reduced" in the filename
    - i.e.   TAXFEDP0109.BMP - image scanned at 300 dpi
                    TAXFEDP0109reduced.BMP - same image scanned at 71 dpi

Linking:

Caret Code to be added to legislation and CA government document references:

- Please add caret code linking for all references to the Income Tax Act, Income Tax Regulations, government documents CRA Documents, etc. (i.e. consisting of: Technical Interpretation, Advance Ruling & Conference Roundtables Documents) and Interpretation Bulletins in the body of text of this product.
- For all references to the Income Tax Act, don't replace "and" between section references with a comma; leave "and" and repeat the caret coding, i.e.

  ^RSC1985c1s5 66, 66.1, 66.2, 66.4 and ^RSC1985c1s5 126;

Caret Coding Chart:
- **the following coding requirements need to be applied**

Notes:

- **Always key a space in between the section "§", "s." or "ss." and number reference:**

sample:
s.1   ➔ s. ^RSC1985c1s5 1
ss.3-7   ➔ ss. ^RSC1985c1s5 3–7
§104(6)   ➔ § ^RSC1985c1s5 104(6)

Caret coding chart:

Additional cart coding can be found in the "Linking Codes.docx" file

Caret code	Descriptions
^RSC1985c1s5	after "ITA" (Income Tax Act) and before number
	(if there is no other Act or Regulations specified, all in-line sections are referring/linking to Income Tax Act)
^CRC1977c945	after "ITR" (Income Tax Regulations) and before number

^RSC1985cE15	*Excise Tax Act* (GST Portions) after "section" and before number
^RSC1985c1s2	*Customs Act* after "section" and before number
^RSA2000cA15	after ACTA or Alberta Corporate Tax Act and before the number
^RSQcl3	after "QTA" (Quebec Taxation Act) and before number
^RRQ1981cl3r1	after "QTR" (Quebec Taxation Regulations) and before number
^CAIXIT	before IT xx (but after Interpretation Bulletin)
^CAIXIC	after IC or Information Circular and before number i.e., 77-R6
^CAIXRCV	after "VD" or "Views Doc No" or "Views Docs" or "Views Documents" and before yyyy-xxxxxxx (long string number)
^CAIXDFCL	Department of Finance comfort letter(s) dated ^CAIXDFCL yyyy-mm-dd (dates have to be done this way to link)
^CAIXDFNEWS	Department of Finance News Release ^CAIXDFNEWS yyyy-xxx
^CAIXRCG	after "Guide(s)" and before T4xx or RC4xxx
^CAIXTNW	after "Income Tax Technical News" and before ITTN-x
^CAIXTN	Income Tax Technical Notes before provision number
^CAIXFORM	before "Form Txxx", Form NRxxx, Form RCxxx, etc.
^CAIXCBA	CBA/CICA Joint Committee Submission before date of submission – yyyy-mm-dd
^CAIXINTADV	Advisory Panel items before yyyy-mm
^CAIXTEI	Tax Executive Institute's letters or articles ^CAIXTEI yyyy-mm-dd
^CAIXPETROJ	Canadian Petroleum Tax Journal for example: 2006 Volume 19, No 1, ^CAIXPETROJ2006V19N1 2
^CAIXVDP	Voluntary Disclosures Program Guidelines ^CAIXVDP yyyy-mm
^CAIXTR	Tax Ruling ^CAIXTR TR-xx
^CAIXATR	Advance Tax Ruling ^CAIXATR ATR-xx
^CAIXTT	Tax Times ^CAIXTT yyyy-xx (release number)
^CAIXAUDIT	CRA's audit manual Chapter ^CAIXAUDIT xx.0 or xx.x.0
^CAIXRDSPB	RDSP Bulletin No. ^CAIXRDSPB x
^CAIXINVP	CRA Investigation Policies ^CAIXINVP yyyy-xx
^CAIXTREATY	Tax Treaties ^CAIXTREATY Canada U.S. Tax Treaty:Art. xxx1
^CAIXTREATY	Canada U.K. Tax Treaty:Art. Xxx

General Specs: Please see LEGKEY2SPECS.doc