

TaxInfo Help Index

How To ...

[Print Tax Forms](#)
[View and Create a New Instance of a Tax Form](#)
[Print Instructions](#)
[View Instructions](#)
[Enter Data in Fields](#)
[Create or Modify Editable Fields](#)
[Create or Modify a Form's Template](#)

Commands

[Toolbar](#)
[File menu](#)
[Edit menu](#)
[Display Options menu](#)
[NextPage](#)
[PreviousPage](#)
[View menu](#)
[Window menu](#)
[Help menu](#)

File menu commands

The File menu offers the following commands:

<u>New</u>	Creates a new TaxInfo document. Choose a sub menu item to bring up an index from which to select a specific form, schedule, publication or instruction to create.
<u>Open Form</u>	Opens a previously saved form, schedule, publication or instruction document. The extension for a TaxInfo document is ".TIN".
<u>Close</u>	Closes the currently active document.
<u>Save</u>	Save the currently active document using its current name.
<u>Save As</u>	Names or renames the currently active document and saves it. Note that the file name extension must be ".TIN".
<u>Save As Template</u>	Saves the currently active document as a template for new instances of the specific form or schedule.
<u>Print</u>	Prints the currently active form, schedule, publication or instruction.
<u>Print Blanks</u>	Prints your selection of blank forms, schedules, publications or instructions.
<u>Print Setup</u>	Selects a printer and printer connection.
<u>1 File Name 1</u>	Opens the most recently used TaxInfo document.
<u>2 File Name 2</u>	Opens the next most recently used TaxInfo document.
<u>3 File Name 3</u>	Opens the third most recently used TaxInfo document.
<u>4 File Name 4</u>	Opens the fourth most recently used TaxInfo document.
<u>Exit</u>	Exits TaxInfo.

File: New sub menu commands

The File: New sub menu offers the following commands:

<u>Forms</u>	Selects a federal tax form for display.
<u>Instructions for Forms</u>	Selects the instructions for a federal tax form for display.
<u>Schedules</u>	Selects a federal tax schedule for display.
<u>Instructions for Schedules</u>	Selects the instructions for a federal tax schedule for display.
<u>Publications</u>	Selects a federal tax publication for display.

Edit menu commands

The Edit menu offers the following commands:

Erase Data in All
Fields

Erase the document. Delete the contents of all fields in the document.

Erase the Current
Field
Copy

Remove the contents of the current field.

Copy the contents of the current field to the Clipboard.

Cut

Remove the contents of the current field, placing it into the Clipboard.

Paste
Copy All Fields

Copy the contents of the Clipboard into the current field.
Copy the contents of all fields in the document into the Clipboard.

Cut All Fields

Remove the contents of all fields in the document, placing them into the Clipboard.

Paste to all fields

Copy the contents of the Clipboard into all the documents fields.

Display Options menu commands

The Display Options menu offers the following commands:

<u>Fit To Window Width</u>	Displays the active document such that it is adjusted to fit within the windows width.
<u>Max Size: No Fit</u>	Displays the active document using the maximum resolution of the currently selected type of bitmap.
<u>Use Printer Bitmaps</u>	Displays the active document using the 300 DPI printer bitmap.
<u>Use Display Bitmaps</u>	Displays the active document using the 140 DPI display bitmap.
<u>Use VGA Bitmaps</u>	Displays the active document using the 90 DPI VGA bitmap.
<u>No Scaling: 100%</u>	Turns off any scaling in effect.
<u>Shrink to 50%</u>	Scales the current document 50% smaller.
<u>Shrink to 33%</u>	Scales the current document 33% smaller.
<u>Shrink to 25%</u>	Scales the current document 25% smaller.

Next Page command

This command will display the next page for the current window. The menu item and button will be disabled if there is no next page.

Shortcuts


Mouse:
Keys: CTRL+PgDn
F8



Previous Page command

This command will display the previous page for the current window. The menu item and button will be disabled if there is no previous page.

Shortcuts

Mouse: 

Keys: CTRL+PgUp
F7

View menu commands

The View menu offers the following commands:

<u>Toolbar</u>	Shows or hides the toolbar.
<u>Status Bar</u>	Shows or hides the status bar.

Window menu commands

The Window menu offers the following commands, which enable you to arrange multiple views of multiple documents in the application window:

<u>New Window</u>	Creates a new window that views the same document.
<u>Cascade</u>	Arranges windows in an overlapped fashion.
<u>Tile</u>	Arranges windows in non-overlapped tiles.
<u>Arrange Icons</u>	Arranges icons of closed windows.
<u>Window 1,</u> <u>2, ...</u>	Goes to specified window.

Help menu commands

The Help menu offers the following commands, which provide you assistance with this application:

<u>Index</u>	Offers you an index to topics on which you can get help.
<u>Using Help</u>	Provides general instructions on using help.
<u>Annotated Forms</u>	Offers an index to forms on which you can get information.
<u>List</u>	
<u>About</u>	Displays the version number of this application.

Exit command (File menu)

Use this command to end your TaxInfo session. You can also use the Close command on the application Control menu.

Shortcuts

Mouse: Double-click the application's Control menu button.



Keys: ALT+F4

Erase Data in All Fields command (Edit menu)

This command will remove the contents of all fields from a document. It erases the contents of a document.

Shortcuts

Keys: CTRL+F

Erase the Current Field command (Edit menu)

This command will remove the contents of the current field from a document. This command is unavailable if you have no fields on the current page of the document.

Shortcuts

Keys: CTRL+G

Cut command (Edit menu)

This command will remove the contents of the current field from a document and put it into the Clipboard. This command is unavailable if you have no fields on the current page of the document.

Cutting a field to the Clipboard replaces its previous contents.

Shortcuts

Mouse:



Keys: CTRL+X

SHIFT+Delete

Clipboard (description)

A temporary storage area for cut or copied field contents. You can paste the contents of the Clipboard into any TaxInfo document or into other applications. The Clipboard holds only the last data cut or copied.

Copy command (Edit menu)

This command will copy the contents of the current field from a document and put it into the Clipboard. This command is unavailable if you have no fields on the current page of the document.

Copying a field to the Clipboard replaces its previous contents.

Shortcuts

Mouse:



Keys: CTRL+C

CTRL+Insert

Paste command (Edit menu)

This command will insert a copy of the Clipboard contents into the current field, replacing the field contents. This command is unavailable if you have no fields on the current page of the document.

Pasting a field from the Clipboard has no effect on the Clipboard contents.

Shortcuts

Mouse:



Keys: CTRL+V
SHIFT+Insert

Copy All Fields command (Edit menu)

This command will copy the contents of all fields from a document and put them into the Clipboard. This command is unavailable if you have no fields in the document.

The fields are copied to the Clipboard so that each field is on a line of its own. The Clipboard contents after the command is performed will contain each field terminated with the end of a line.

Copying all fields to the Clipboard replaces its previous contents.

Shortcuts

Keys: CTRL+H

Cut All Fields command (Edit menu)

This command will remove the contents of all fields from a document and put them into the Clipboard. This command is unavailable if you have no fields in the document.

The fields are cut to the Clipboard so that each field is on a line of its own. The Clipboard contents after the command is performed will contain each field terminated with the end of a line.

Cutting all fields to the Clipboard replaces the Clipboard's previous contents.

Shortcuts

Keys: CTRL+J

Paste to All Fields command (Edit menu)

This command will insert a copy of the Clipboard contents into all fields in the document, replacing the contents of all fields in the document. This command is unavailable if you have no fields in the document.

Each field in the Clipboard is delimited by CR,LF (carriage return, line feed) pairs. In other words, each line of data of the Clipboard's contents will be pasted to the next field in the document. If there are more lines in the Clipboard than fields in the document, the remaining lines in the Clipboard are ignored. If there are more fields in the document than lines in the Clipboard, the residual fields remain the same.

Pasting all fields from the Clipboard has no effect on the Clipboard contents.

Shortcuts

Keys: CTRL+K

Forms command (File:New menu)

Use this command to select a federal tax form for viewing. This command brings up the Forms Index dialog box from which you select a form and the beginning page to view.

Options that effect how a tax form are viewed are set from the Display Options menu commands.

Shortcuts



Mouse:
Keys: CTRL N

Form Instructions command (File:New menu)

Use this command to select a federal tax form's instructions for viewing. This command brings up the Forms Instructions Index dialog box from which you select a form's instruction and the beginning page to view.

Options that effect how a tax form's instructions are viewed are set from the Display Options menu commands.

Shortcuts



Mouse:
Keys: CTRL+I

Schedules command (File:New menu)

Use this command to select a federal tax schedule for viewing. This command brings up the Schedules Index dialog box from which you select a schedule and the beginning page to view.

Options that effect how a tax schedule are viewed are set from the Display Options menu commands.

Shortcuts



Mouse:
Keys: CTRL+D

Schedules Instructions command (File:New menu)

Use this command to select a federal tax schedule's instructions for viewing. This command brings up the Schedules Instructions Index dialog box from which you select a schedule instruction and the beginning page to view.

Options that effect how a schedule's instructions are viewed are set from the Display Options menu commands.

Shortcuts



Mouse:
Keys: CTRL+U

Publications command (File:New menu)

Use this command to select a federal tax publication for viewing. This command brings up the Publications Index dialog box from which you select a publication and the beginning page to view.

Options that effect how a tax publication are viewed are set from the Display Options menu commands.

Shortcuts



Mouse:
Keys: CTRL+E

Index Dialog Box

This dialog box is used to select an item to view. An item is selected by either clicking on an item in the dialog box's combo box and then pressing the OK button, or by double clicking an item in the combo box.

It is optionally also used to select a beginning viewing page. The default beginning page is page one. There are two ways one can select a page. The first way is to enter a page number in the page combo box in the center of the lower part of the Index dialog box. The other way is by clicking the arrow in the page combo box and then selecting the desired page from the list which drops down.

Fit To Width command (Display Options menu)

Use this command to size the document in the current window to fit in the windows width. Resizing of the window horizontally resizes the displayed item. You will never have any horizontal scroll bars with this selection.

This command and the Max Size: No Fit command. are mutually exclusive. If it is currently set it will be disabled and checked.

Shortcuts

Keys: ALT+D, F

Max Size: No Fit command (Display Options menu)

Use this command to turn off the Fit To Width command. Resizing of the window does not effect the resolution of the displayed item. You will frequently have scroll bars with this selection. This option is the default.

This command and the Fit To Width command are mutually exclusive. If it is currently set it will be disabled and checked.

Shortcuts

Keys: CTRL+M

Use Printer Bitmaps command (Display Options menu)

Use this command to display highest resolution documents in the current window. This option allows viewing of documents as they would be printed on a 300 DPI printer.

This command, the Use VGA Bitmaps command and the Use Display Bitmaps command are mutually exclusive. If it is currently set it will be disabled and checked.

Shortcuts

Keys: CTRL+R

Use Display Bitmaps command (Display Options menu)

Use this command to view documents using display resolution bitmaps. This option is designed to allow viewing of a document in a more manageable size for display purposes. It works best on displays that have resolutions of 1024 pixels wide or larger.

This command, the Use VGA Bitmaps command and the Use Printer Bitmaps command are mutually exclusive. If it is currently set it will be disabled and checked.

Shortcuts

Keys: CTRL+Y

Use VGA Bitmaps command (Display Options menu)

Use this command to view documents using VGA resolution bitmaps. This option is designed to allow viewing of a document in a more manageable size for VGA displays. This option is the default.

This command, the Use Display Bitmaps command and the Use Printer Bitmaps command are mutually exclusive. If it is currently set it will be disabled and checked.

Shortcuts

Keys: CTRL+Z

No Scaling: 100% (Display Options menu)

Use this command to turn off any scaling or shrinking that is in effect. This option is the default.

This command and the Shrink commands: Shrink to 50%, Shrink to 33%, and Shrink to 25%, are mutually exclusive. If it is currently set it will be disabled and checked.

Shortcuts

Keys: CTRL+Q

Shrink to 50% (Display Options menu)

Use this command to shrink or scale the currently active document to 50%. A maximum of four scalings may be in effect at one time. That includes any combination of the three types of scaling. A document may be scaled as small as four 25% shrinks, although it is doubtful if it will be readable that small.

This command and the No Scaling: 100% command are mutually exclusive. If it is currently set it will be checked.

Shortcuts

Keys: CTRL+5

Shrink to 33% (Display Options menu)

Use this command to shrink or scale the currently active document to 33%. A maximum of four scalings may be in effect at one time. That includes any combination of the three types of scaling.

This command and the No Scaling: 100% command are mutually exclusive. If it is currently set it will be checked.

Shrink to 25% (Display Options menu)

Use this command to shrink or scale the currently active document to 25%. A maximum of four scalings may be in effect at one time. That includes any combination of the three types of scaling.

This command and the No Scaling: 100% command are mutually exclusive. If it is currently set it will be checked.

Toolbar command (View menu)

Use this command to display and hide the Toolbar, which includes buttons for some of the most common commands in TaxInfo, such as Forms Index and Print. A check mark appears next to the menu item when the Toolbar is displayed.

See [Toolbar](#) for help on using the toolbar.

Toolbar



The toolbar is displayed across the top of TaxInfo's window, below the menu bar. The toolbar provides quick mouse access to many tools used in TaxInfo.

To hide or display the Toolbar, choose the Toolbar command from the View menu (ALT, V, T).

Click To



Click on this button to create a new federal tax form or template for a form. TaxInfo displays the Form Index dialog box, in which you can locate and open the desired form.



Click on this button to create a new instance of a form's instructions or a template for it. TaxInfo displays the Form Instructions Index dialog box, in which you can locate and open the desired set of instructions.



Click on this button to create a new federal tax schedule or template for it. TaxInfo displays the Schedule Index dialog box, in which you can locate and open the desired schedule.



Click on this button to create a new instance of a schedule's instructions or a template for it. TaxInfo displays the Schedule Instructions Index dialog box,

in which you can locate and open the desired set of instructions.



Click on this button to create a new federal tax publication or template for it. TaxInfo displays the Publication Index dialog box, in which you can locate and open the desired publication.



Click on this button to open an existing document (form, schedule, instruction, or publication) in a new window. TaxInfo displays the File Open dialog so that you can select the document to open. TaxInfo document files always have a ".TIN" extension.



Click on this button to save a document (form, schedule, instruction, or publication) to disk using its current name and location. To save a document for the first time or to change a documents name and/or location use the Save As command. To save a template for the first time use the Save As Template command.



Click on this button to remove the contents of the current field and put it in the clipboard.



Click on this button to copy the contents of the current field to the clipboard.



Click on this button to replace the contents of the current field with the current contents of the clipboard.



Click on this button to go to the next page of the document. TaxInfo displays the next page of the document in the currently active window.



Click on this button to go to the previous page of the document. TaxInfo displays the previous page of the document in the currently active window.



Click on this button to select and print blank forms, schedules, instructions, or publications. TaxInfo displays the Print Blanks Selection dialog box, in which you can locate and print the desired items.



Click on this button to Print the current document. TaxInfo displays the Print dialog box, from which one specifies how the current form, schedule, instructions, or publication should be printed.



Click on this button to get help on federal tax forms. An annotated list of forms is available for your assistance.



Click on this button to get context sensitive help.



Click on this button to get product identification help.

Status Bar command (View menu)

Use this command to display and hide the Status Bar, which describes the action to be executed by the selected menu item or depressed toolbar button, and keyboard latch state. A check mark appears next to the menu item when the Status Bar is displayed.

See [Status Bar](#) for help on using the status bar.

Status Bar



The status bar is displayed at the bottom of the TaxInfo window. To display or hide the status bar, use the Status Bar command in the View menu.

The left area of the status bar describes actions of menu items as you use the arrow keys to navigate through menus. This area similarly shows messages that describe the actions of toolbar buttons as you depress them, before releasing them. If after viewing the description of the toolbar button command you wish not to execute the command, then release the mouse button while the pointer is off the toolbar button.

The right areas of the status bar indicate which of the following keys are latched down:

Indicator	Description
CAP	The Caps Lock key is latched down.
NUM	The Num Lock key is latched down.
SCRL	The Scroll Lock key is latched down.

New command (Window menu)

Use this command to open a new window with the same contents as the active window. You can open multiple document windows to display different parts or views of a document at the same time. If you change the contents in one window, all other windows containing the same document reflect those changes. When you open a new window, it becomes the active window and is displayed on top of all other open windows.

Cascade command (Window menu)

Use this command to arrange multiple opened windows in an overlapped fashion.

Tile command (Window menu)

Use this command to arrange multiple opened windows in a non-overlapped fashion.

Tile Horizontal command (Window menu)

Use this command to vertically arrange multiple opened windows in a non-overlapped fashion.

Tile Vertical command (Window menu)

Use this command to arrange multiple opened windows side by side.

Window Arrange Icons Command

Use this command to arrange the icons for minimized windows at the bottom of the main window. If there is an open document window at the bottom of the main window, then some or all of the icons may not be visible because they will be underneath this document window.

1, 2, ... command (Window menu)

TaxInfo displays a list of currently open document windows at the bottom of the Window menu. A check mark appears in front of the document name of the active window. Choose a document from this list to make its window active.

Index command (Help menu)

Use this command to display the opening screen of Help. From the opening screen, you can jump to step-by-step instructions for using TaxInfo and various types of reference information.

Once you open Help, you can click the Contents button whenever you want to return to the opening screen.

Shortcuts

Keys: ALT+H, I

Using Help command (Help menu)

Use this command for instructions about using Help.

Shortcuts

Keys: ALT+H, U

Annotated Forms List (Help menu)

Use this command to bring up Forms Help. Clicking on a particular Form from the opening screen will display an annotation for that Form.

Once you open Help, you can click the Contents button whenever you want to return to the opening screen. Exiting Forms Help will return you to TaxInfo.

Shortcuts



Mouse:
Keys: ALT+H, F

About command (Help menu)

Use this command to display the copyright notice and version number for your copy of TaxInfo.

Shortcuts


Mouse:
Keys: ALT+H, A



Context Help command

Use the Context Help command to obtain help on some portion of TaxInfo. When you choose the Toolbar's Context Help button, the mouse pointer will change to an arrow and question mark. Then click somewhere in the TaxInfo window, such as another Toolbar button. The Help topic will be shown for the item you clicked.

Shortcut

Mouse: 
Keys: SHIFT+F1

Title Bar

The title bar is located along the top of a window. It contains the name of the application and document.

To move the window, drag the title bar. Note: You can also move dialog boxes by dragging their title bars.

A title bar may contain the following elements:

- Application Control-menu button
- Document Control-menu button
- Maximize button
- Minimize button
- Name of the application
- Name of the document
- Restore button

Scroll bars

Displayed at the right and bottom edges of the document window. The scroll boxes inside the scroll bars indicate your vertical and horizontal location in the document. You can use the mouse to scroll to other parts of the document.

Size command (System menu)

Use this command to display a four-headed arrow so you can size the active window with the arrow keys.



After the pointer changes to the four-headed arrow:

1. Press one of the DIRECTION keys (left, right, up, or down arrow key) to move the pointer to the border you want to move.
2. Press a DIRECTION key to move the border.
3. Press ENTER when the window is the size you want.

Note: This command is unavailable if you maximize the window.

Shortcut

Mouse: Drag the size bars at the corners or edges of the window.

Move command (Control menu)

Use this command to display a four-headed arrow so you can move the active window or dialog box with the arrow keys.



Note: This command is unavailable if you maximize the window.


Shortcut

Keys: CTRL+F7

Minimize command (application Control menu)

Use this command to reduce the TaxInfo window to an icon.


Shortcut

Mouse: Click the minimize icon  on the title bar.
Keys: ALT+F9

Maximize command (System menu)

Use this command to enlarge the active window to fill the available space.

Shortcut

Mouse: Click the maximize icon  on the title bar; or double-click the title bar.
Keys: CTRL+F10 enlarges a document window.

Next Window command (document Control menu)

Use this command to switch to the next open document window. TaxInfo determines which window is next according to the order in which you opened the windows.

Shortcut

Keys: CTRL+F6

Previous Window command (document Control menu)

Use this command to switch to the previous open document window. TaxInfo determines which window is previous according to the order in which you opened the windows.

Shortcut

Keys: SHIFT+CTRL+F6

Close command (Control menus)

Use this command to close the active window or dialog box.

Double-clicking a Control-menu box is the same as choosing the Close command.



Note: If you have multiple windows open for a single document, the Close command on the document Control menu closes only one window at a time.

Shortcuts

Keys: CTRL+F4 closes a TaxInfo document window
 ALT+F4 closes the TaxInfo window or a dialog box

Restore command (Control menu)

Use this command to return the active window to its size and position before you chose the Maximize or Minimize command.

Switch to command (application Control menu)

Use this command to display a list of all open applications. Use this "Task List" to switch to or close an application on the list.

Shortcut

Keys: CTRL+ESC

Dialog Box Options

When you choose the Switch To command, you will be presented with a dialog box with the following options:

Task List

Select the application you want to switch to or close.

Switch To

Makes the selected application active.

End Task

Closes the selected application.

Cancel

Closes the Task List box.

Cascade

Arranges open applications so they overlap and you can see each title bar. This option does not affect applications reduced to icons.

Tile

Arranges open applications into windows that do not overlap. This option does not affect applications reduced to icons.

Arrange Icons

Arranges the icons of all minimized applications across the bottom of the screen.

No Help Available

No help is available for this area of the window.

No Help Available

No help is available for this message box.

How to Print Tax Forms

To print a filled in federal tax form, schedule, instruction, or publication, first open the document using Open Form, then select Print.

To print a blank federal tax form, select Print Blanks from the file menu. There are two steps involved in selecting a blank form to print: setup and selection.

The first time the Print Blanks Selection dialog box comes up after TaxInfo is started, it will be set up for federal tax form selection by default. That is exactly the setup required for this case. Subsequently, it will be set up for what ever type of document selection was set up the last time it was invoked. When the Print Blanks Selection dialog box is displayed, ensure that the following items are selected: the "Forms" radio button in the "Type" group, the "All Pages" radio button in the "Page Handling" group, and the "Print Forms" check box.

From the "Available items to print" list box in the left portion of the Print Blanks Selection dialog box, select the form you wish to print. That form will be added to the "Items selected to print" list box on the right - one entry for each page in the form. After all the forms you wish to print are listed in the "Items selected to print" list box, select the Print button on the bottom left of the Print Blanks Selection dialog box to print those forms.

Note that TaxInfo is designed to print at 300 dpi. Ensure that your printer is setup to print at 300 DPI before attempting to print with TaxInfo. For proof copies, or other print outs of forms that will not be filed with the IRS you may use lower DPI settings. A printout at a lower DPI setting may be of sufficient quality to file with the IRS. Because of the variety of possible printers, their quality at various DPI settings, and the state of their ink situations, you must determine if it is of sufficient quality for filing.

For a complete description of the print selection process and the Print Blanks Selection Dialog, see Print Blanks.

How to Print Tax Form Instructions

To print a federal tax form instruction, select Print Blanks from the file menu. There are two steps involved in selecting a form's instructions to print: setup and selection.

The first time the Print Blanks Selection dialog box comes up after TaxInfo is started, it will be set up for federal tax form selection by default. Subsequently, it will be set up for what ever type of document selection was set up the last time it was invoked. When the Print Blanks Selection dialog box is displayed, ensure that the following items are selected: the "Forms" radio button in the "Type" group, the "All Pages" radio button in the "Page Handling" group, and the "Print Instructions" check box. Also ensure that the "Print Forms" checkbox is not checked. Both the "Print Instructions" and the "Print Forms" check boxes can be checked at the same time. This allows one to select both forms and instructions at the same time.

From the "Available items to print" list box in the left portion of the Print Blanks Selection dialog box, select the form whose instructions you wish to print. That form's instructions will be added to the "Items selected to print" list box on the right - one entry for each page in the instruction set. After all the instructions you wish to print are listed in the "Items selected to print" list box, select the Print button on the bottom left of the Print Blanks Selection dialog box to print those instructions.

Note that TaxInfo is designed to print at 300 dpi. However, it will print at any DPI resolution you set up. For print outs that will not be filed with the IRS you should select a DPI setting which results in a print out of sufficient quality for your purposes. The best quality will be at 300 DPI. For print outs that will be filed, use 300 DPI.

Instructions may also be filled out and printed. The procedure is identical to that used for forms.

For a complete description of the print selection process and the Print Blanks Selection Dialog, see [Print Blanks](#).

How to View and Create a New Instance of a Tax Form

To view a federal tax form, select "Forms" from the File: New sub menu to bring up the Forms Index dialog box. This is accomplished by clicking once with the left mouse button on "File" on the menu bar, then clicking once on "New" in the File menu, and finally clicking on "Forms" from the File: New sub menu.



As an alternative, you can instead press the this dialog box.

button on the tool bar to bring up

Select the form you wish to view from the combo box in the Forms Index dialog box. This is done by using the scroll bars on the right of the combo box to scroll through the forms list until you locate the form you wish to bring up. Then click on the form you want with the left mouse button. Finally click on the OK button. Alternatively, you can double-click (click twice in rapid succession) on the form you wish to view with the left mouse button and avoid having to click the OK button.

Select close from the File menu to get rid of a tax form you no longer want on the screen. If you have entered data or in some other way modified the contents of the form, select Save As from the File menu to name the file in which to save the forms data and save it before closing it. If you try closing a form that has been modified before saving it, TaxInfo will first ask you if you want to save it before proceeding with the close.

After you have saved a Form using Save As, you reopen that instance of the form with the Open Form command from the File menu. Once an instance of a form has been named, you can save it using the Save command.

For a complete description of the available indices and all their options, see File: New sub menu commands.

How to View Tax Forms Instructions

To view a federal tax form's instructions, select "Instructions For Forms" from the File: New sub menu to bring up the Forms Instructions Index dialog box. This is accomplished by clicking once with the left mouse button on "File" on the menu bar, then clicking once on "New" in the File menu, and finally clicking on "Instructions For Forms" from the File: New sub menu.



As an alternative, you could instead have pressed the

button on the tool bar

to bring up this dialog box.

Select the form whose instructions you wish to view from the combo box in the Forms Instructions Index dialog box. This is done by using the scroll bars on the right of the combo box to scroll through the forms list until you locate the form whose instructions you wish to bring up. Then click on the form whose instructions you want with the left mouse button. Finally click on the OK button. Alternatively, you can double-click (click twice in rapid succession) on the form whose instructions you wish to view with the left mouse button and avoid having to click the OK button.

Select close from the File menu to get rid of tax form instructions you no longer want on the screen. If you have entered data or in some other way modified the contents of the instructions, select Save As from the File menu to name the file in which to save the instructions data and save it before closing it. If you try closing instructions that have been modified before saving it, TaxInfo will first ask you if you want to save it before proceeding with the close.

For a complete description of the available indices and all their options, see File: New sub menu commands.

How to Enter Data in Fields

If the document does not have a template and you would like it to have one, see [How to Create or Modify a Form's Template](#). Note that many templates for forms and schedules are provided for you. If a template is not desired and you have not created fields for the document see [How to Create or Modify Editable Fields](#).

Once fields exist for a document, either via a template or by creating them, you can edit them only after first getting in them. You can get in them using one of two methods. You can click on them once with the left mouse button or tab to them with the tab keys. Once in the field, you use the keyboard keys to type characters. You may also use the standard set of keys for editing the text like the delete, backspace, home and end keys.

Data in a numeric field is right justified. A numeric field is one that contains numerals and optionally a decimal point, dollar sign, or comma. All other fields are left justified. Thus a numeric field will display and print its contents adjusted to right align with the end of the field. While other fields will display and print their contents to left align with the beginning of a field.

Note that the templates provided are designed with the expectation of including a decimal point in a numeric field that is used for a dollar amount. That is, the fields were created to align properly if one includes a decimal point followed by two digits for dollar amount fields. The decimal point will print out over the vertical line on the form used to separate dollars from cents. It is not necessary to include two zeroes after the decimal point for whole dollars, TaxInfo will add them for you.

Data in a field is limited to the characters that will fit in that field. If you want to enter more characters than will fit in the field, modify the field to make it wider. Fields can be modified once they exist, see [How to Create or Modify Editable Fields](#).

How to Create or Modify Editable Fields

To create a field, position the mouse cursor at the point you want the field to be created and double click with the left mouse button. The field will be created starting at that point with a default width and height. You can now enter data into the field just created.

Fields can be resized, moved, and deleted once created. The first step is to create a field edit window by clicking once with the right mouse button on the field to be resized, moved, or deleted. You can then delete the field by pressing the delete key (Del).

After you have created a field edit window, moving and resizing are done in a similar manner to moving and resizing any window in Windows. To move it, press and hold down the left mouse button over the window and drag the window to its new location. When the window is at its new location release the left mouse button. To resize the window, move the mouse cursor to the window's boundary so that the cursor changes to a resize cursor, then press and hold the left mouse button to drag the boundary out to its intended size. When finished moving and resizing the window, click it with the right mouse button to conclude your editing. You may alternatively click with the right mouse button on a different field to remove the current field editing window and create one for the other field.

For a description of how to enter data in fields once created, see [How to Enter Data in Fields](#).

How to Create or Modify a Form's Template

A template is a set of fields and their contents or data designed for a particular document. Whenever a new document is opened, the template is applied to define the documents fields and any default data for those fields. A template is created or modified for a particular Form, Schedule, Instruction, or Publication by the command Save As Template.

In a template the fields may or may not have data in them. In most cases the fields in a template will be blank (as in the templates supplied). You may want to modify these templates so that every time you create a new form using the command New certain fields are already filled in.

Any document can have a template: Forms, Schedules, Instructions or Publications. Templates are supplied for many forms and schedules.

A template can be edited after it is opened. An easy way to open a template is by using the New command from the file menu, just as one would create a normal new document. The only difference, other than intent, between editing a template and creating a new document is how it is saved. For a template one saves with the Save As Template command, for a document one saves using the command Save As. Save As Template already knows where in your install directory and what name to use to save as a template. The Save As command needs to ask you for that information.

One creates or edits fields in a template in exactly the same way as for documents, see How To Create or Modify Editable Fields.

Open Form command (File menu)

Use this command to open an existing form, schedule, instruction and/or publication document. This command presents a File Open dialog box, where you may select the particular TaxInfo (*.tin) document you wish to open.

Note that you create a new TaxInfo document by selecting one of the File menu New subcommands and then save it using the Save As command with a ".TIN" extension for the file name

Shortcuts

Keys: CTRL+O

Close command (File menu)

Use this command to close the window containing the active form, schedule, instruction or publication document. TaxInfo suggests that you save changes to your document before you close it. If you close a document without saving, you lose all changes made since the last time you saved it. Before closing an untitled document, TaxInfo displays the Save As dialog box and suggests that you name and save the document.

You can also close a document by using the Close icon on the document's window, as shown below:



Shortcuts

Keys: CTRL+C

Save command (File menu)

Use this command to save the active form, schedule, instruction, or publication document to its current name and directory. When you save a document for the first time, use the File menu Save As command so you can also name your document. If you want to change the name and/or directory of an existing document before you save it, choose the Save As command.

Shortcuts

Keys: CTRL+S

Save As command (File menu)

Use this command to save and name the active form, schedule, instruction or publication document. TaxInfo displays the Save As dialog box so you can name your document.

To save a document with its existing name and directory, use the Save command.

Shortcuts

Keys: CTRL+A

Save As Template command (File menu)

Use this command to save the active form, schedule, instruction, or publication document as a template. After a template exists for a document, when you bring up a new instance of the document, the fields and data saved in the template will automatically be included in the new document.

Many templates for forms and schedules are provided for you. To change any of these templates, open the corresponding ".TIN" file residing on the CD in the "TEMPLATS" directory. When your editing is complete, select Save As Template and TaxInfo will save your edited template in the "TEMPLATS" directory in the installation directory. Any templates you modify or create and then "Save As Template" will be the template used. When TaxInfo looks for a template, it first looks in the "TEMPLATS" directory under the install directory and then on the CD. The first template found is the one used.

Shortcuts

Keys: CTRL+T

Print command (File menu)

Use this command to print the active form, schedule, instruction or publication document to the printer. This command presents a Print dialog box, where you may specify the range of pages to be printed, the number of copies, the destination printer, and other printer setup options.

Note that TaxInfo is designed to print at 300 dpi. At any other setting TaxInfo will still print, however the form may not be of sufficient quality to file with the IRS. To print a file-able tax form or schedule print at 300 dpi. For proof copies or other print outs that will not be filed, you may print at any other DPI setting.

Shortcuts

Keys: CTRL+P

Print Blanks command (File menu)

Use this command to print a selection of blank forms, schedules, instructions and/or publications. This command presents a Print Blanks Selection dialog box, where you may specify the particular items you wish to print.

Note that TaxInfo is designed to print at 300 dpi. At any other setting TaxInfo will still print, however the form may not be of sufficient quality to file with the IRS. To print a file-able tax form or schedule print at 300 dpi. For proof copies or other print outs that will not be filed, you may print at any other DPI setting.

Shortcuts



Toolbar:
Keys: CTRL+T

Print Blanks Selection dialog box

The objective is to build a list of items to print in the "Items selected to print" list box. The "Items selected to print" list box is the right most list box that is empty when the dialog box first comes up. When the "Items selected to print" list box contains all the items you wish to print, press the Print button on the bottom left of the Print Selection dialog box to send those items to be printed.

You add items to the "Items selected to print" list box by clicking with the left mouse button on an item listed in the "Available items to print" list box. This list box is the left most and is filled with items available to print when the Print Selection dialog box first comes up. Scrolling up and down is available to reach an item further up or down in the list. You can also scroll left and right to read the items annotation.

You delete items from the "Items selected to print" list box by clicking with the left mouse button on an item. You may also delete all the items contained in the "Items selected to print" list box by clicking the "Clear all items selected to print" button located directly below the "Items selected to print" list box.

The two sets of radio buttons on the top of the Print Selection dialog box control the type of items listed in the "Available items to print" list box and how pages are handled when an item is selected from the "Available items to print" list box. When the "Form" radio button in the "Type" group is selected, forms are listed in the "Available items to print" list box. When the "Schedules" radio button in the "Type" group is selected, schedules are listed in the "Available items to print" list box. When the "Publications" radio button in the "Type" group is selected, publications are listed in the "Available items to print" list box. When the "All pages" radio button in the "Page Handling" group is selected, all the pages for the particular item you select in the "Available items to print" list box are added to the "Items selected to print" list box. When the "Select pages" radio button in the "Page Handling" group is selected, each available page for an item is listed in the "Available items to print" list box, thus allowing you to select individual pages one at a time to add to the "Items selected to print" list box.

The two check boxes below the "Available items to print" list box are used to control the selection of instructions. When the check box "Print Forms" is checked a selection from the "Available items to print" list box will add those items to the "Items selected to print" list box. When the check box "Print Instructions" is checked a selection from the "Available items to print" list box will add the instructions for the item to the "Items selected to print" list box. If they are both checked both the item and its instructions will be added to the "Items selected to print" list box. Note that some items do not have any instructions (they may be included in the item itself). Publications never have any instructions so when the radio button "Publications" is selected in the "Type" group the two check boxes are disabled (grayed).

The action taken when a button is pressed follows:

Clear all items selected to print

Causes all items listed in the "Items selected to print" list box to be cleared or deleted from the list box. Pressing this button causes the selection process to start over. Note that individual items can be cleared in the "Items selected to print" list box by clicking on them.

Print

Causes all items listed in the "Items selected to print" list box to be printed. Choose the Print Setup button to change the printer and printer connection.

Print Setup

Displays a Print Setup dialog box, so you can select a printer and printer connection.

Cancel

Cancels the entire Print Selection dialog. The dialog box disappears.

Print Setup command (File menu)

Use this command to select a printer and a printer connection. This command presents a Print Setup dialog box, where you specify the printer and its connection.

Print Setup dialog box

The following options allow you to select the destination printer and its connection.

Printer

Select the printer you want to use. Choose the Default Printer; or choose the Specific Printer option and select one of the current installed printers shown in the box. You install printers and configure ports using the Windows Control Panel.

Orientation

Although you may choose Portrait or Landscape, TaxInfo is designed to work in Portrait orientation only.

Paper Size

Although you may select the size of paper to be printed on, TaxInfo is designed for 8.5" x 11" paper.

Paper Source

Some printers offer multiple trays for different paper sources. Specify the tray here.

Options

Displays a dialog box where you can make additional choices about printing, specific to the type of printer you have selected.

Network...

Choose this button to connect to a network location, assigning it a new drive letter.

File Open dialog box

The following options allow you to specify which file to open:

File Name

Type or select the filename you want to open. This box lists files with the extension you select in the List Files of Type box. TaxInfo files have a ".TIN" extension.

List Files of Type

Select the type of file you want to open:
TaxInfo expects an extension of "TIN" file type.

Drives

Select the drive in which TaxInfo stores the file that you want to open.

Directories

Select the directory in which TaxInfo stores the file that you want to open.

Network...

Choose this button to connect to a network location, assigning it a new drive letter.
This button only appears if there is a network installed.

File Save As dialog box

The following options allow you to specify the name and location of the file you're about to save:

File Name

Type a new filename to save a document with a different name. A filename can contain up to eight characters and an extension of up to three characters. TaxInfo adds the extension you specify in the Save File As Type box.

Drives

Select the drive in which you want to store the document.

Directories

Select the directory in which you want to store the document.

Network...

Choose this button to connect to a network location, assigning it a new drive letter. This button only appears if there is a network installed.

Print dialog box

The following options allow you to specify how the document should be printed:

Printer

This is the active printer and printer connection. Choose the Setup option to change the printer and printer connection.

Setup

Displays a Print Setup dialog box, so you can select a printer and printer connection.

Print Range

Specify the pages you want to print:

All Prints the entire document.

Pages Prints the range of pages you specify in the From and To boxes.

Copies

Specify the number of copies you want to print for the above page range.

Collate Copies

Prints copies in page number order, instead of separated multiple copies of each page.

Not choosing Collate Copies will result in faster printing.

Print Quality

Select the quality of the printing. Generally, lower quality printing takes less time to produce.

Most Recently Used File command (File menu)

Use this command to open one of your last four most recently used documents. Clicking once with the left mouse button on one of the items in the MRU (most recently used) list will bring up a window with that form, schedule, instruction or publication in it. Optionally you may use the keyboard as indicated below in "Shortcuts" where the number corresponds to the order of the file in the MRU list.

When TaxInfo is initially installed, there will be only one item in the MRU. That item, SMPL1040.TIN, is an example of a completely filled in Form 1040. It will have a "1" prefixing it. Thus, one may bring up SMPL1040.TIN either by clicking on it once with the left mouse button, or by holding down the Ctrl key while pressing the number 1.

Shortcuts

Keys: CTRL+1
CTRL+2
CTRL+3
CTRL+4

