

Checkpoint

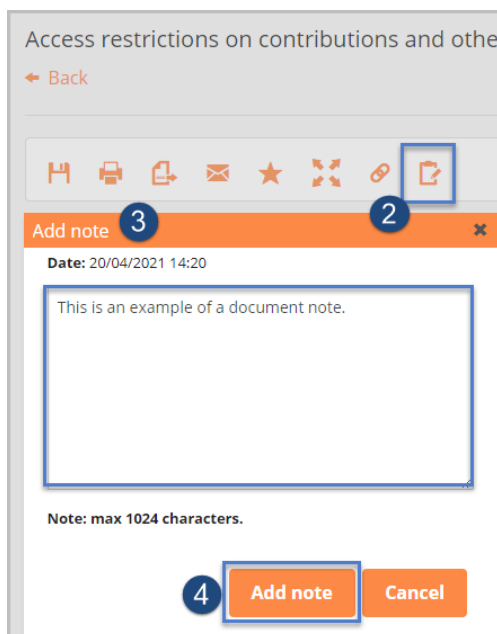
Annotations

There are various ways to add Annotations to a document. This ensures important information is easily located within the document. Annotated documents can also be saved to My Folders. See Folders Guide for further information.

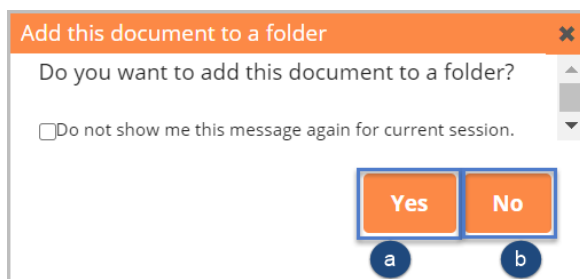
Document Note

Creating a Document Note will apply to the overall document and will appear at the top of the document.

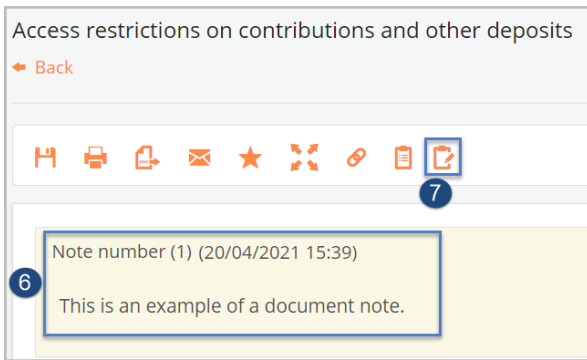
1. Open a document
2. Click the **Add Note** icon from the white tool bar
3. In the **Add Note** text box, enter the note
4. Click **Add Note** button to save the note



5. The **Add this document to a folder?** pop up window will prompt to save the note to a folder.



- a. Select **Yes** – You can **Create New Folder**
Note: Creating a folder is optional
 - b. Select **No** – return to the document
6. The note is now visible at the top of the document.
7. To add additional notes to the document, select the **Add Note** icon in the white tool bar
Note: A maximum of 10 notes can be added per document.



Inline Note

Creating an Inline Note will add a note to a selected section of a document, allowing for a quick and easy reference.

1. To add an **Inline Note**, select the text
 - a. Three selectable options will appear beside the highlighted text.
 - b. Select the **Add Note** option
 - c. Enter the note into text box
 - d. Select **Add note** button to save
 - e. The note will appear on either side of the text selected

Note: If prompted to save the document to a folder, make your selection and follow the steps.

About the XRB

About the XRB 1

The External Reporting Board (XRB) is an independent Crown Entity, established under section 22 of the Financial Reporting Act 1993 , and subject to the Crown Entities Act 2004 .

XRB Responsibilities

The functions of the XRB are prescribed by the Financial Reporting Act 1993 and comprise:

- developing and implementing an overall strategy for financial reporting standards and auditing and assurance standards (including developing and implementing tiers of financial reporting and assurance);
- preparing and issuing accounting standards;
- preparing and issuing auditing and assurance standards, including the professional and ethical standards that will govern the professional conduct of auditors; and
- liaising with national and international organisations that exercise functions that correspond with, or are similar to, those conferred on the XRB.

a

Add Highlight

Add Note b

Add Snippet

XRB Outcome Goals

The XRB's outcome goal is:

Add note ✕

Date: 06/05/2021 12:00

c This is an example of a note

Note: max 1024 characters.

d Add note

Cancel

About the XRB

The External Reporting Board (XRB) is an independent Crown Entity, established under section 22 of the Financial Reporting Act 1993, and subject to the Crown Entities Act 2004.

XRB Responsibilities

(12/05/2021 12:45) ✎ ✕

This is an example of a note entry

Highlight

You can apply a Highlight to selected text within a document making it easy to visually single out specific text for use later, prompt further research and reduce the risk of missing important information.

1. To add a highlight, select the text
2. Select the **Highlight** option

XRB Outputs 1

The XRB activities are focused on the delivery of three outputs:

- developing financial reporting strategy;
- preparing and issuing accounting standards; and
- preparing and issuing auditing and assurance standards.

XRB Structure

The XRB Organisation (the XRB) consists of:

1. The XRB Board itself (XRB Board);

Add Highlight 2
Add Note
Add Snippet

3. Select OK to save the highlight
Note: If prompted to save the document to a folder, make your selection and follow the steps.

SUCCESS ✕

The highlight has been saved to this document.

3

OK

4. The highlighted text will appear in blue

XRB Outputs

The XRB activities are focused on the delivery of three outputs:

- developing financial reporting strategy;
- preparing and issuing accounting standards; and
- preparing and issuing auditing and assurance standards.

Snippet

A section of text within a document can be saved to your Folders as a Snippet for easy identification of important information.

1. To add a Snippet, select text
2. Select the Snippet option

The screenshot shows a document with the following text:

XRB Structure ①

The XRB Organisation (the XRB) consists of:

1. The XRB Board itself (XRB Board);
2. The New Zealand Accounting Standards Board (NZASB)
3. The New Zealand Auditing and Assurance Standards Board (NZAuASB); and
4. The XRB Staff Team (Staff).

The XRB organisational structure is designed to ensure that the technical resources are available to allow standard setting to be undertaken in accordance with best practice. It is also designed to enhance functional equivalence with Australia.

The XRB Board is responsible for general governance of the organisation, overall financial reporting strategy, standards strategy, and oversight of the standard setting boards.

②

On the right side, there is a vertical toolbar with the following options: Add Highlight, Add Note, and Add Snippet.

3. Add Snippet to Folder pop-up box appears
 - a. Enter a folder name and select the **Create New Folder** button, or;
 - b. From the Folders listing, select the folder to save the snippet into
 - c. Enter the **Name**
 - d. Selecting **Save** will place the snippet into the selected folder

The screenshot shows the 'Add Snippet to Folder' pop-up box with the following elements:

- ③ Title bar: Add Snippet to Folder
- Input field: Snippet (with a blue box around it and a circled 'a' below it)
- Button: Create New Folder
- Folder listing:
 - [-] Folders
 - [-] Superannuation
 - [-] Tax Updates
 - [-] Snippet (with a blue box around it and a circled 'b' to its left)
- Name input field: Name: About the XRB (with a blue box around it and a circled 'c' below it)
- Buttons: Save (with a blue box around it and a circled 'd' below it) and Cancel

4. To view saved snippets, navigate to the folder saved into by selecting **Folders** from the orange toolbar.

The screenshot shows the orange toolbar with the following buttons: ④ History, Preferences, Alerts, Folders (with a blue box around it), Contacts, and Client ID.

Managing Annotations



Show/Hide Note(s)

You can view your document with or without your notes being visible.

Note: By default, notes added to a document are visible

1. To hide the note(s), click the **Note** icon from the document **Tool Bar**
2. To show the note(s), click on the same **Note** icon



Edit a note

1. Click the **Pencil** icon against the note
2. Edit your note in the **Add Note** window
3. Click the **Confirm** button to save your changes



Delete a note

1. Click on the **X** icon against the note
2. Click on the **Delete** button when prompted "Are you sure you want to delete the note?"
3. The note will be deleted
4. Alternatively, click **Cancel** to exit

Delete Highlight

Delete a highlight

1. Select the highlighted text section
2. Choose **Delete Highlight** from the options list
3. Click the **Delete** button when prompted "Are you sure you want to remove the highlight?"
4. The highlight will be deleted from this section of text
5. Alternatively, click **Cancel** to exit

Note: When deleting highlights, any associated notes will also be deleted



Print/Export/Email notes

1. Select the **Print/Export** or **Email** icon from the document tool bar
2. From the pop-up window, select, "Include Document Annotations" from the **Output Options** list
3. Click **OK**. The generated document will include any added notes and/or highlights

Note: You can print/export or email your document with or without your notes being visible.



Managing multiple notes for the same text selection

You can add multiple notes to a selected section of text.

1. Click on any highlighted section of the text and select **Add Note**
2. Enter your text into the **Add Note** window
3. Click **Add Note**. The new note will appear directly below the first note
4. To bulk delete all notes associated to a section of text, click on the highlighted section, and choose "Delete Note"

