IBFD
Tax Research Platform
Explanation of Differences between New and Former IBFD Tax Research Platform
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1. Introduction

The IBFD Tax Research Platform has recently been redesigned and enhanced in order to provide practitioners with a more simplified international tax research experience that’s more intuitive, efficient and effective. This document explains in detail the main interface and functionality changes between the new and former IBFD Platform search interface.

New and former IBFD Platform search interface both available from February

The new search interface is ready to use via this link: https://research.ibfd.org/. For your convenience, the former search interface is still available throughout the month of February via: https://online.ibfd.org/kbase/.

2. Main differences

2.1. Search interface

The new search page has been slimmed down to a smaller set of main information collections, which can be accessed and searched directly.
Executing a free text search or applying a search filter in the default search page will generate an **entire new result list presentation**, inspired by Google and similar search engines. A scrollable horizontal menu bar presents results for:

- **All**: This **mixed result list** was not available on the former IBFD Platform and contains **all relevant documents from the different collections** (within a user’s subscription).
- **Main collections**: Relevant **results per main collection** (within a user’s subscription).

When accessing a main collection, we offer a **search filter on the left-hand side to zoom in** on a specific collection. These are the most important filters:

- **Tables**: “Table Type” for selecting the available Tables and Country Key Features.
- **Country Tax Guides**: “Collection Title” for selecting from the available Country Surveys, Country Analyses and different Topical Analyses.
- **Global Topics**: “Collection Title” for selecting from the available generic commentaries (e.g. Commentaries on the European VAT Directives, Global Tax Treaty Commentaries and International Tax Structuring).
- **Primary Sources**: “Collection Title” for selecting either domestic or international primary sources (e.g. EU Law and OECD Documentation).
- **Case Law**: “Collection Title” for selecting a particular case law collection (e.g. Tax Treaty Case Law, ECJ Case Law and Other Case Law).
- **Journal Articles and Papers**: “Collection Title” for selecting a journal title.
The free text search box has been made much more prominent. Typing words or numbers matching with document titles will make these documents appear higher in the ranking (e.g. Anti-Tax Avoidance Directive, or Cadbury Schweppes).

In the new IBFD Platform we only present four search filters by default to give prominence to the most used search filters and Topic Search. The “More filters” button enables you to show other filters available.

Please note that search filters will often be multi-select. This means that you can, for example, type the country name (presenting you with matching country names) or you may additionally scroll down and tick boxes of the required countries and execute a search with two or more countries in one go. This means no more one-by-one country selecting that generated a result after every selection. The tick box in front of the text box enables you to select all matching filters showing.

Example multi-select search filter
In the collections News, Treaties & Models, Primary Sources, and Case Law, a generic date selection option is available at the bottom of the search filter. It works in the following way:

If, for example, you would like to see the news reports on the United Kingdom published after 1 January 2017, select the date involved. You can also subsequently select a second later date to see the news reports published in a given period (e.g. 1 January 2017 – 1 January 2019). This system works for all collections with this type of date selection.
There is a very important feature that deviates from the former IBFD Platform: All controls are shown at all times.

The controls (search filters, actions, document navigation options) will be greyed out when not active or not being part of your access and entitlement. This is not only at the search filter level, but also at the result list and document level. This is similar to how, for example, Windows and other well-known interfaces operate. It avoids that filters, functionality, etc. continuously change, disappear or re-appear.

In the process of searching, it is possible to hide the selected filters. By clicking “Show current filters” they can be made visible again. In addition, the user can start a new search by clicking the “Clear search” command. A single filter can be removed by clicking the cross.
Sorting controls have been simplified: After selecting the sorting option, the arrows enable the user to see a list of results in ascending or descending order.

When scrolling through a result list or document, the top frame does not stay visible any more except for the navigation tabs. With the “back to Top” button in the bottom right corner, you may return to the top of the page.

2.2. Document navigation and controls: Main differences

Similar to the former IBFD Platform navigation throughout a document is possible with help of the outline or with help of topics (IBFD taxonomy terms) via the tabs in the top left-hand column.

When scrolling down in a document, the outline navigation shows you where in the document you actually are. With a “back to Top” button in the bottom right corner you may return to the top of the page.

![Outline navigation example](image-url)
If you have found a document based on a free text search, a control will appear at document level to browse to the parts where the search term is highlighted. The highlighting can also be switched off.

An important change is that interesting see also information is centrally available via the top left-hand tab “See also”. Opening this tab will present you with categories of related information, such as Historical Versions, Language Versions, and other generic links. Clicking a category will lead the user to the information at the end of the document with additional controls.

In the middle frame at the top of the document, we always will present a “Back to search” link combined with a breadcrumb indicating in which document (and section) you are and the last reviewed date. This is the same information we used to show in the title frame of a document on the former IBFD Platform.
At document level, **action functionality** is available at the right-hand top of the document via an Actions button that shows a drop-down menu with possible actions.

In the new IBFD Platform we further distinguish information references at article/section level of a document that, to a certain extent, were also available in the former IBFD Platform. We distinguish two sorts of references:

- **Alert/Later developments**: This makes you aware of important information that we strongly advise you to read in context of the article/section, such as a development about the topic that happened after we last reviewed the information, e.g. an MLI provision having impact on a treaty article.
- **Always shown at the right-hand top of the article/section.**
See also: This makes the user aware of other information that may be of interest to read in context of the article/section, such as more detailed information in another chapter, journal article, or case law about the topic.

Always shown at the end of the article/section.
An important improvement of the new IBFD Platform is the introduction of a drop-down menu for documents opened in a session (displaying a maximum of ten in chronological order). This helps you to quickly move from one document to another and print, export or compare similar or different documents in one go via checking tick boxes. However, please note the following limitations for comparisons:

- The comparison of different documents (side-by-side view/bilingual display) is limited to two.
- The comparison of similar documents is also limited to two, except for Tables.
- The exporting of documents is limited to one document per export.
2.3. Action and comparison functionality: Main differences

The new IBFD Platform offers easy, streamlined access to action and comparison functionality. Many tools can now be generated straight from the search and result list or from the relevant document.

**Country Chapters Comparison**: Select two similar chapters (e.g. Corporate Taxation – Country Analysis chapters of the Netherlands and Germany) by ticking the boxes in the result list, as shown in the figure below. Subsequently, select Compare from the Actions menu of the result list. The Navigation controls at the top enable you to compare the same sections. Comparing different documents creates a similar side-by-side view with Navigation controls per document. Alternatively, you can open these documents and subsequently generate a comparison by ticking the boxes of the documents in the Documents drop-down menu.
**Country Tables Comparison:** Select as many documents as you want within a specific table collection (e.g. Country Key Features) via the Actions menu of the result list.
**Historical Tax Archives:** The historical versions of country information and primary sources are *only* retrievable via the *See also* section at document level and the versions are located at the end of the document. There you have controls to access a historical version, compare two historical versions and limit the period within which you are searching for historical versions.
**International Tax Structuring:** This tool is now part of each “Summarizing table” per section covered in the International Tax Structuring guide, which is available via Global Topics. In the Summarizing table, you may select a home country and a foreign country, which will provide you with links to the relevant explanation of the country’s tax system, if available, and a control for showing country information side by side.

**Simultax:** As before, this interactive tax calculation example is part of the Corporate Taxation Country Analysis chapter section 3. There is no additional entry via the Tools tab anymore. Historical versions can also be accessed from there.
**Treaty Article Comparison**: This works similarly to the Country Chapters Comparison. Select two treaties (e.g. on Income and Capital) by ticking the boxes in the result list. Subsequently, select Compare in the Actions menu of the result list. The Navigation controls at the top enable you to compare the same articles. Comparing a treaty with a model creates a similar side-by-side view with Navigation controls per document. Alternatively, you can open these documents and subsequently generate a comparison by ticking the boxes of the documents in the Documents drop-down menu.
Treaty Article Export: This tool to export multiple income and capital tax treaty articles to MS Word, PDF or Excel format is only available on the former IBFD Platform. It will soon be released on the new IBFD Platform as well.

Treaty Status Monitor: This tool to check the year of signature and status of each treaty document available in the comprehensive IBFD Treaties collection is only available on the former IBFD Platform. It will soon be released on the new IBFD Platform as well.
2.4. Personalization: Main differences

When you are signed in, the following personal settings are accessible under your initials (at the top right-hand side of the screen):

- **History**: Same as before, documents accessed in the past three months when signed in.
- **Favourites**: Same as before, personal searches, documents, matrices, side-by-side views added to your Favourites.
- **Annotations**: Same as before, personal annotations made in documents on the IBFD Platform when signed in.
- **Account**: Still takes you to the My account section on the IBFD corporate website.
- **Settings**: Here you can set the number of documents per result page and set (and later change) the default page based on your Favourites.

The only difference is that the look and feel of these settings have changed. We advise you, as of now, to create any new Favourites or Annotations in the new IBFD Platform in order to use these in the future.

Right below the initials button we offer a Help button with an elaborate explanation of the new IBFD Platform.
2.5. Seamless experience across mobile and desktop

The content and interface of the new IBFD Platform automatically adapt to any screen size (from desktop to smartphone).

On a wide screen, all search controls and filters are in sight. On smaller screens, notice the menu appearing in the top right corner and the filters button on the left-hand side, which produces an overlay to start a search. By closing the panel, you return to the result list.
On a wide screen, all document controls and functionality are in sight. On smaller screens, notice the document navigation appearing in the top left corner.

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