



**An Australian Government Initiative**

**Standard Business Reporting**

**SBR**

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# ***STANDARD BUSINESS REPORTING TAXONOMY COLLABORATION ENVIRONMENT (YETI)***

## ***USER GUIDE***

**Purpose:** This document describes step by step instructions in the use of the SBR taxonomy collaboration environment (Yeti version 2.8).

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## TABLE OF CONTENTS

<b>DOCUMENT INFORMATION</b> .....	<b>3</b>
Revision history .....	3
Distribution .....	3
Approvals .....	3
<b>BACKGROUND</b> .....	<b>4</b>
<b>ACCESSING TAXONOMIES</b> .....	<b>5</b>
<b>SEARCH</b> .....	<b>10</b>
<i>Search</i> .....	10
<b>COMMENTS</b> .....	<b>11</b>
<i>View Existing Comments</i> .....	11
<i>Add New Comments</i> .....	12
<b>CONFIGURATION</b> .....	<b>13</b>
<b>FURTHER INFORMATION</b> .....	<b>14</b>
<b>ATTACHMENT A: YETI MODERATION PROCESS</b> .....	<b>15</b>

## DOCUMENT INFORMATION

### Revision history

Version Number	Revision Date	Summary of Changes
1.0	13/04/2012	Created and Approved
1.1	24/05/2012	Updated registration information for new website

### Distribution

This document has been distributed to:

Name	Issue Date	Version
Published on SBR Website	13/04/2012	1.0
Published on SBR Website	30/05/2012	1.1

### Approvals

This document requires the following approval/s.

Name and Signature	Project Role and Title	Issue Date	Version
Name: John McAlister	Assistant Commissioner SBR Services and Operations	25/05/2012	1.1

## BACKGROUND

1. Individuals interested in implementing and/or working with SBR Taxonomies can view or download them in the Taxonomy Collaboration Environment (Yeti). The collaboration environment allows registered users to raise questions, issues, and concerns.
2. For software developers who want to enable SBR functionality in their applications, the SBR Program has provided a Software Developers' Kit (SDK).
3. The collaboration environment is used primarily by the SBR in undertaking its taxonomy development projects. The collaboration environment provides taxonomy exploration and review capabilities via an intuitive, browser-based interface.
4. **Components of a taxonomy**  
There are two major components in the SBR Taxonomy: the SBR AU (Definitional) Taxonomy and the SBR Reports (SBR Reporting Taxonomies).

### ***SBR AU (Definitional) Taxonomy***

The SBR Definitional Taxonomy contains a complete set of harmonised data elements and associated definitions for information to be exchanged between business and government under SBR. Like a dictionary, the SBR Definitional Taxonomy uniquely defines each data element, with each equivalent to one of the individual pieces of information sought on a government report.

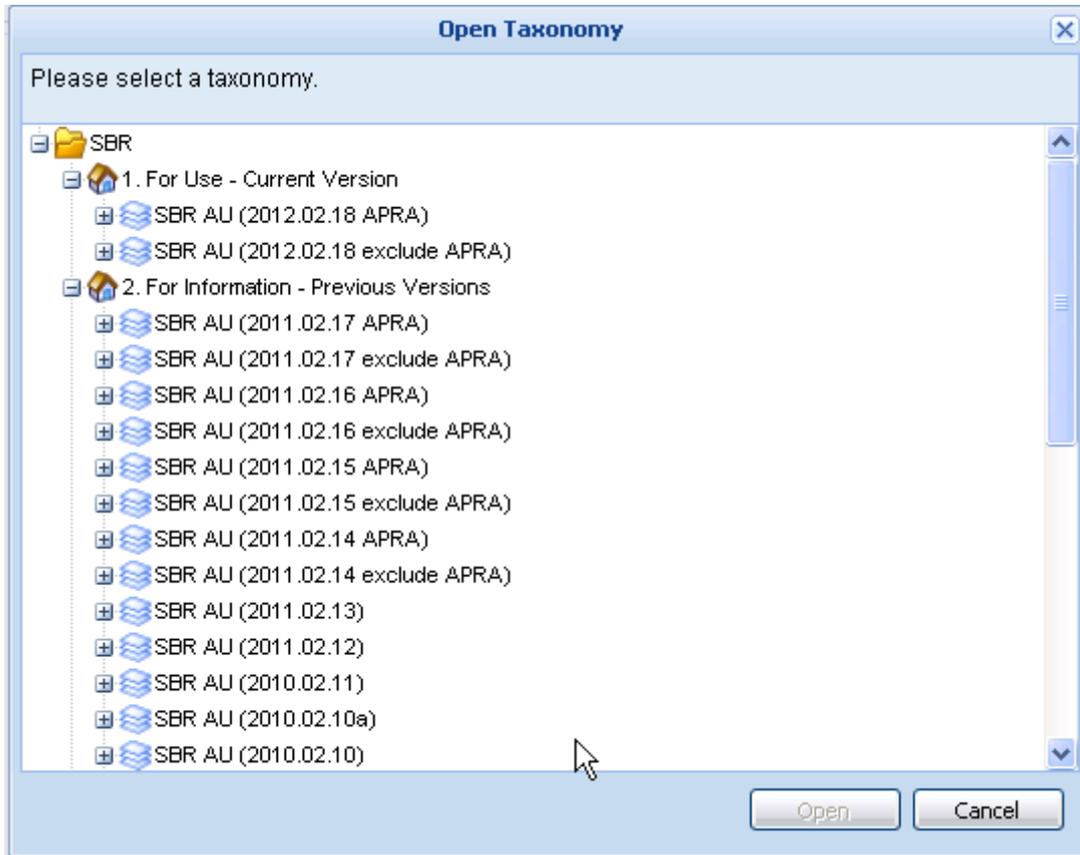
### ***SBR Reports***

The SBR Reports reflect the specific message interaction for each agency report supported by SBR. This is achieved by importing and re-using data elements and their associated definitions from the SBR Definitional Taxonomy. Like words from a dictionary, individual entries from the SBR Definitional Taxonomy list are combined to define the complete content of each agency report.

For more information on the structure of the SBR Taxonomy please see the [SBR Taxonomy Architecture documentation](#).

## ACCESSING TAXONOMIES

1. The SBR Taxonomy Collaboration Environment is located:  
[www.taxonomy-collaboration.sbr.gov.au/yeti](http://www.taxonomy-collaboration.sbr.gov.au/yeti)
2. On the main page a dialogue box “Open Taxonomy” will appear.



3. Background information

### ***Versions of taxonomies***

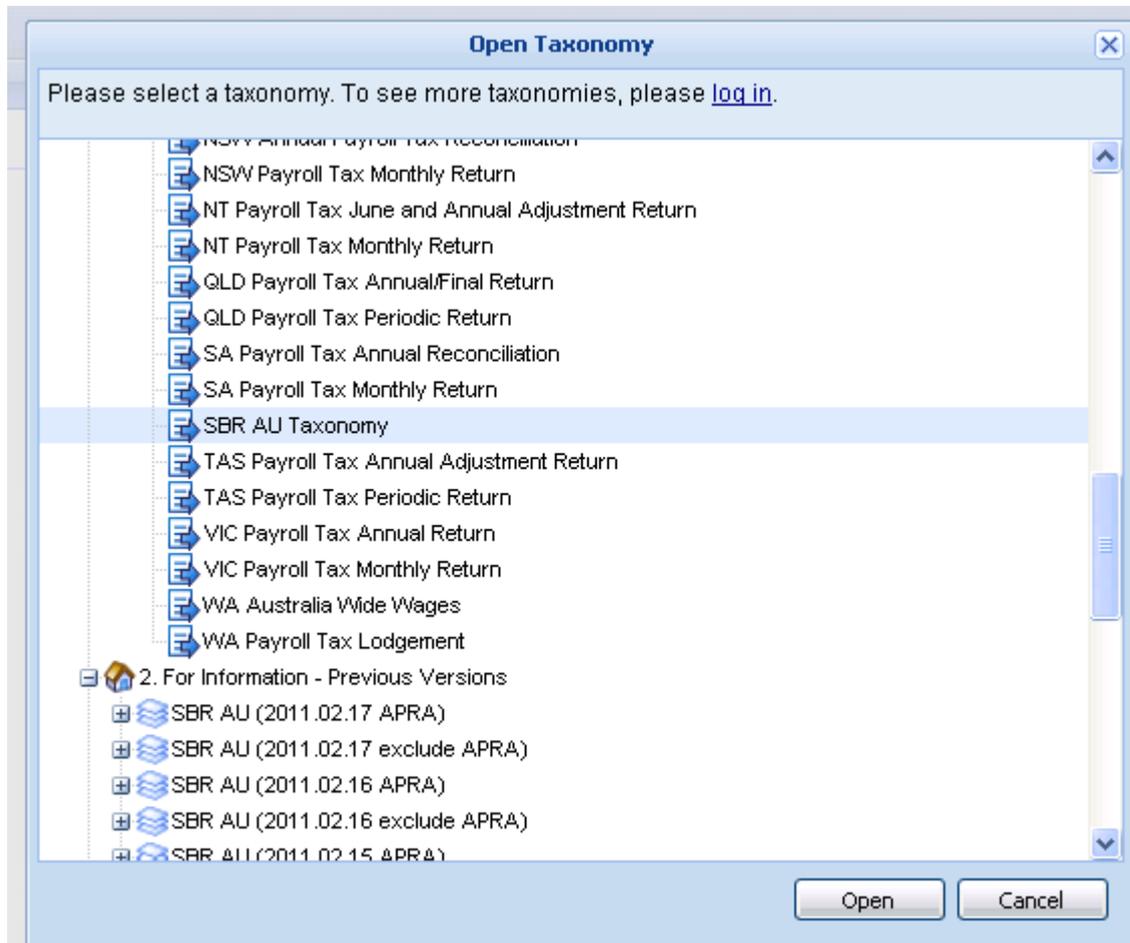
All versions of the SBR Taxonomy are publicly available to view and download. However, you will need a login (SBR website login and password) to comment. The taxonomies are split into different 'review groups' to assist in navigation.

These groups are:

1. **For Use - Current Taxonomy.** The latest published taxonomy for use and (after login) commenting.
2. **For Information – Previous Versions.** This contains the older versions of the taxonomies. Commenting is not available.
3. **For Testing – Candidate Release.** When a candidate release is available for comment this option will be available to view and (after login) commenting.
4. **For Review – SuperStream.** This is the draft taxonomy created for the SuperStream project that is available to view and (after login) commenting.

- To open a taxonomy, click on the  of the version of taxonomy you would like then choose the entry point that corresponds to the report or the SBR AU (definitional ) taxonomy and click *Open*.

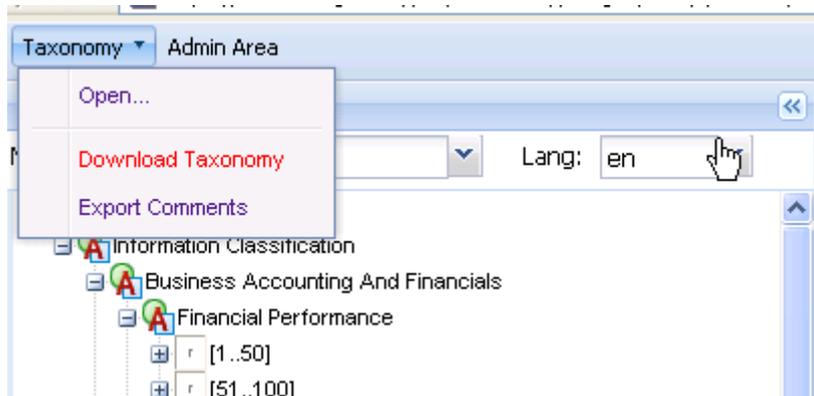
e.g. SBR AU Taxonomy entry point:



- Details of that taxonomy will now be displayed.

## Download

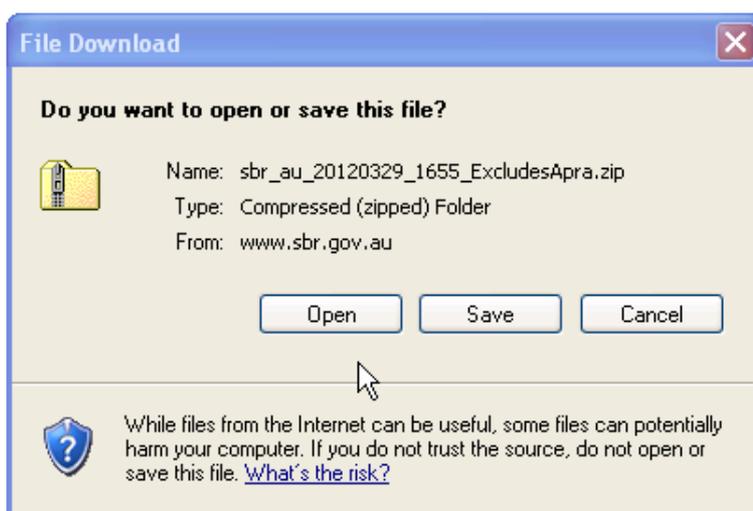
1. After opening the taxonomy that you would like to download. Click *Taxonomy* on the top left corner of page.



2. Click on the *Download Taxonomy* button. A download taxonomy dialogue box will pop up.



3. Click on the "Download File" link and save the file to your preferred location.



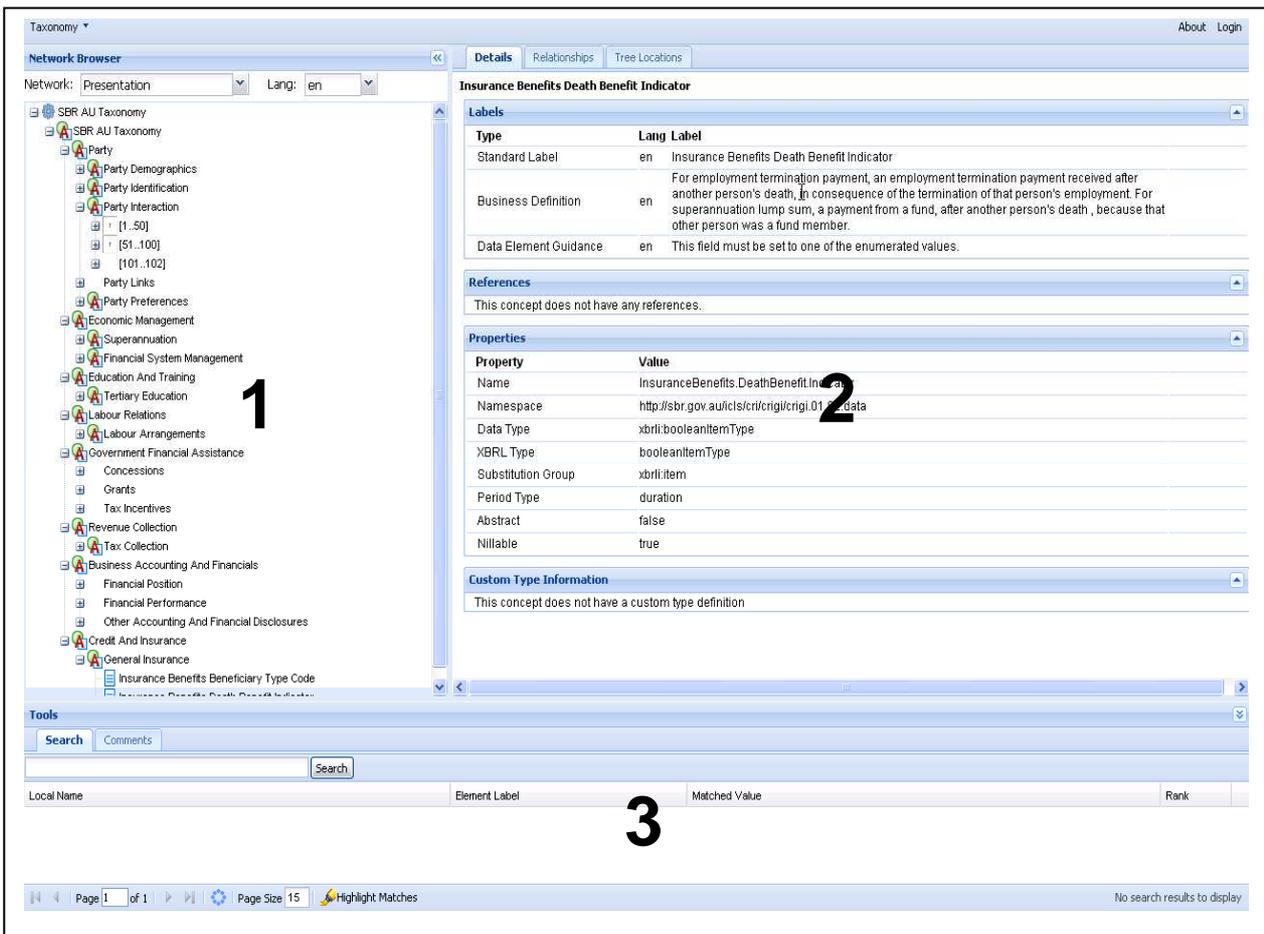
Please note that you may need an XBRL tool to use the downloaded taxonomy file.

# Navigating

The Taxonomy Viewer is arranged into three main areas:

1. Network Browser
2. Details Area
3. Tools Panel

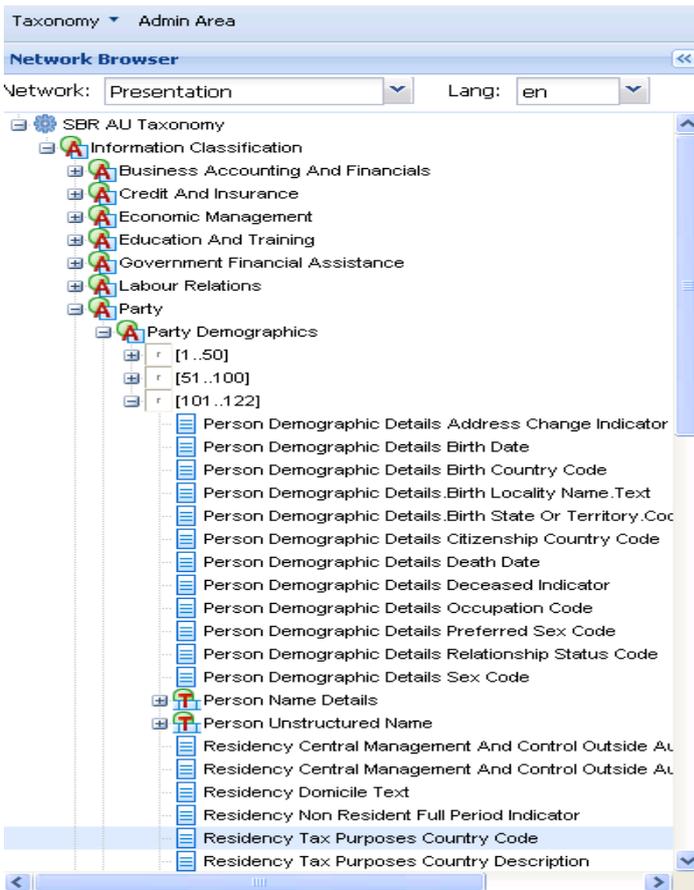
You can rearrange the size of three panels in this view by dragging and dropping. You can also hide the Network Browser and the Tools Panel by clicking the  buttons.



## 1. Network Browser

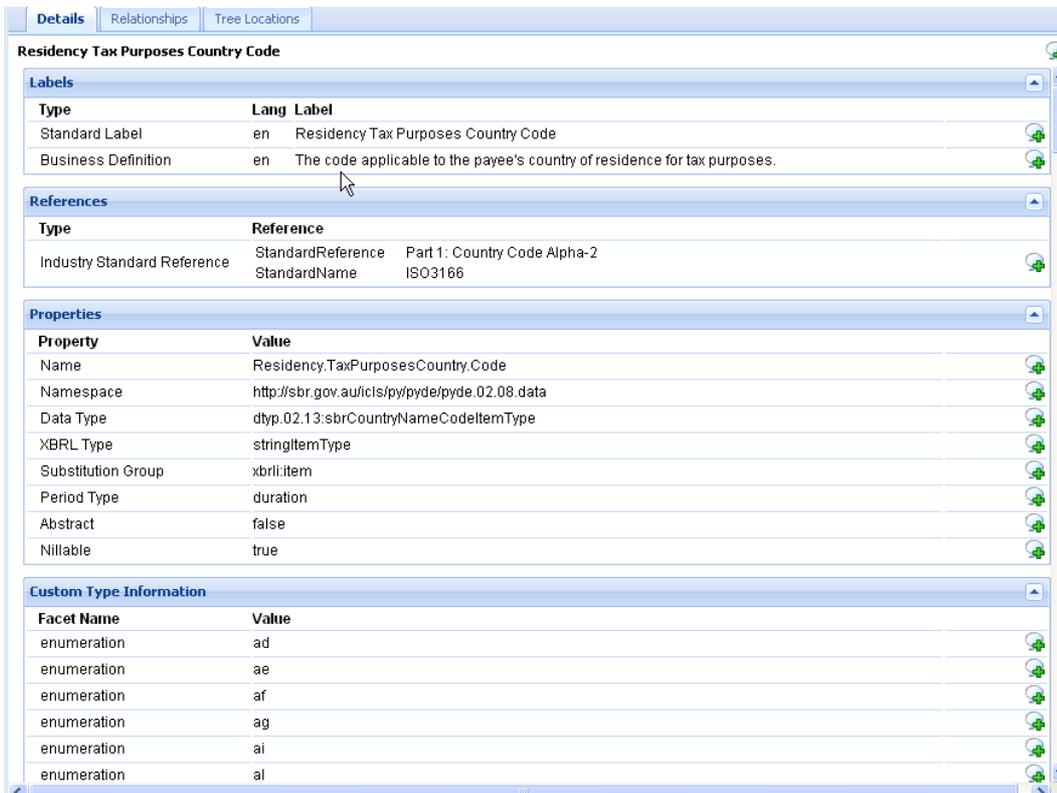
After opening a taxonomy entry point, the Network Browser on the left hand side will display relationships between concepts in the taxonomy. Click the  buttons to see different levels of concepts. Clicking on a concept will open its details in the *Details Area*.

For example open the SBR AU Taxonomy (definitonal) entry point and select an item from the *Network Browser*, in this case “Residency Tax Purposes Country Code”.



## 2. Details Area

This pane contains three tabs: *Details*, *Relationships*, and *Tree Locations* – giving you access to different aspects of the selected concept.



Details of the concept “Residency Tax Purposes Country Code” is displayed here, including labels, references, XBRL attributes and custom items. You can collapse panels that are not of interest using the  minimise buttons.

The *Relationship* tab shows the calculation relationships defined for this concept. Some concepts do not have calculation relationships.

Concepts are often used more than once in a single taxonomy. The *Tree Location* Tab displays information relating to the selected concept across the taxonomy that you opened.

### 3. Tools Panel

The Tools Panel provides searching and commenting function. For details please see **Search** and **Comment** sections below.

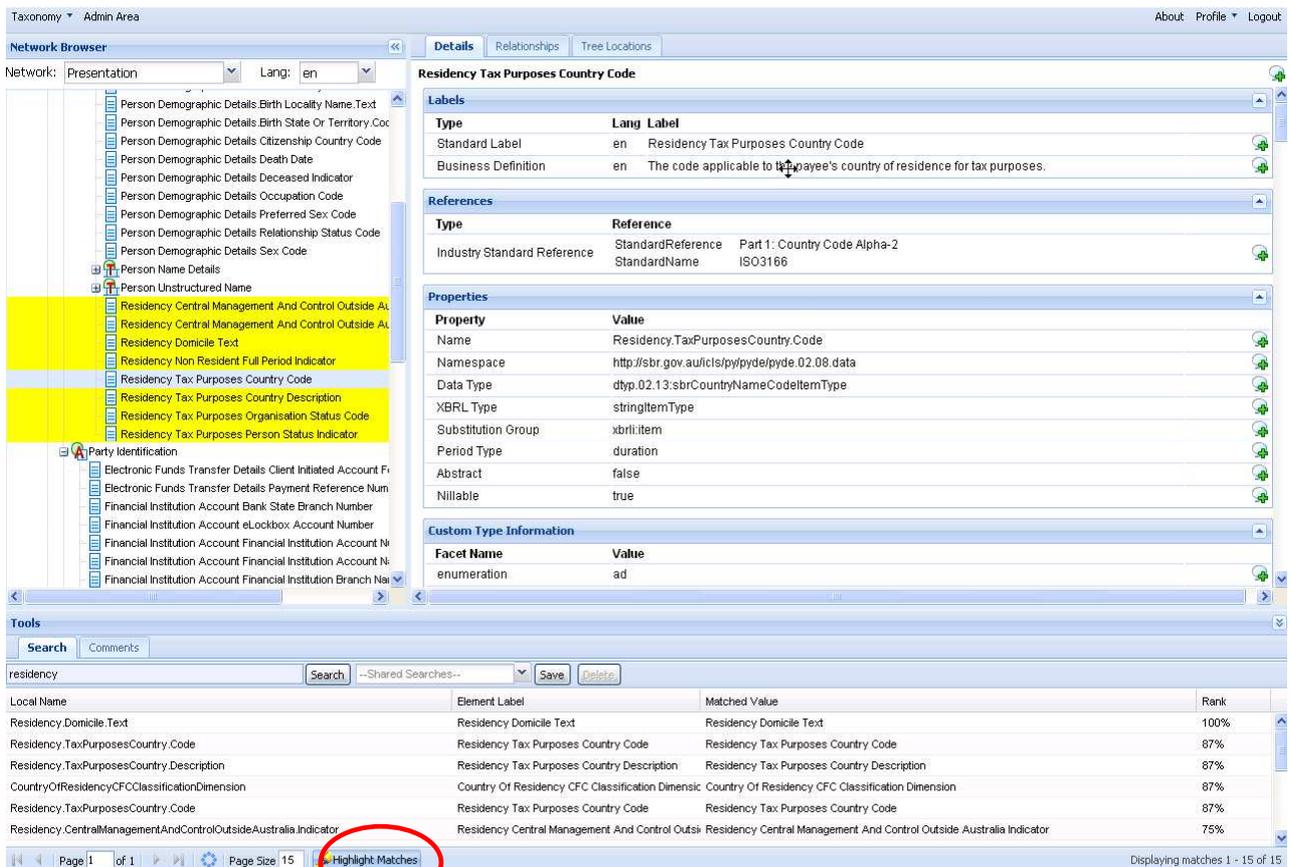
## SEARCH

There are two tabs in the *Tools Panel*: *Search* and *Comment*.

### Search

Users can search for a particular item of interest by typing the keyword in the Search box.

For example, type “Residency” in the search box.



The screenshot shows the 'Tools' panel with the 'Search' tab active. The search term 'residency' is entered in the search box. Below the search box is a table of search results. The table has four columns: Local Name, Element Label, Matched Value, and Rank. The results are sorted by relevance, with 'Residency Domicile Text' having a 100% match. Other results include 'Residency Tax Purposes Country Code' with an 87% match. At the bottom of the search results, there is a 'Highlight Matches' button with a magnifying glass icon, which is circled in red in the image.

Local Name	Element Label	Matched Value	Rank
Residency Domicile Text	Residency Domicile Text	Residency Domicile Text	100%
Residency Tax Purposes Country Code	Residency Tax Purposes Country Code	Residency Tax Purposes Country Code	87%
Residency Tax Purposes Country Description	Residency Tax Purposes Country Description	Residency Tax Purposes Country Description	87%
Country Of Residency CFC Classification Dimension	Country Of Residency CFC Classification Dimension	Country Of Residency CFC Classification Dimension	87%
Residency Tax Purposes Country Code	Residency Tax Purposes Country Code	Residency Tax Purposes Country Code	87%
Residency Central Management And Control Outside Australia Indicator	Residency Central Management And Control Outside Australia Indicator	Residency Central Management And Control Outside Australia Indicator	75%

The results are displayed in order of relevance. Users can click the  **Highlight Matches** button at bottom of the *Tools Panel* and concepts containing the word “Residency” are highlighted in the *Network Browser*.

## COMMENTS

The SBR collaboration environment requires a login to comment on taxonomies.

### View Existing Comments

1. You can access the Login dialogue box from two locations:

From the Open Taxonomy Dialogue Box:

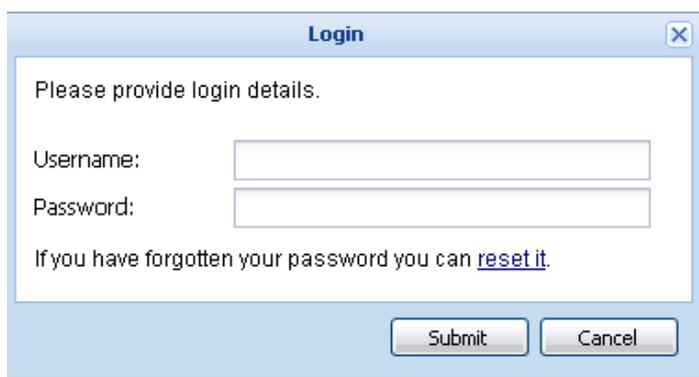


From the right top corner above the *Details Area* if taxonomy is already opened:



2. Enter your user name and password. Then click the Submit button.

If you do not have a login you will need register on the SBR website: [www.taxonomy-collaboration.sbr.gov.au/content/public](http://www.taxonomy-collaboration.sbr.gov.au/content/public)



Users CANNOT reset passwords on Yeti. For password resets please contact the [SBR Service Desk](#) or call 1300 488 231.

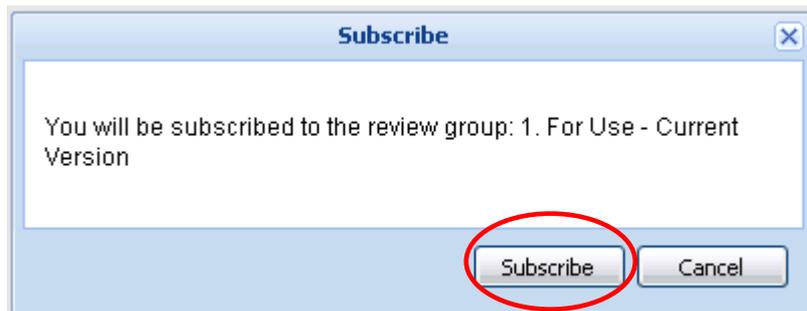
3. Open the taxonomy you wish to comment on as per access instructions above.

4. Click the Comment Tab in the *Tools Panel*.



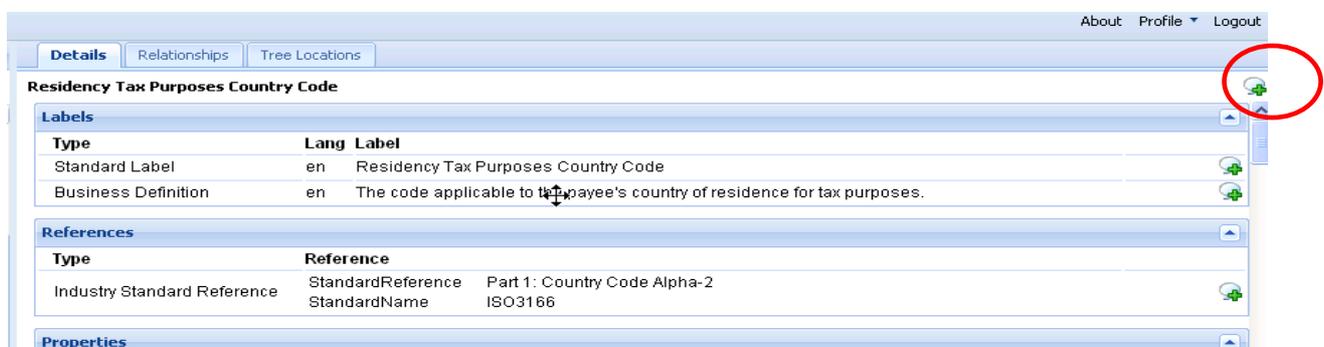
You must be a member of this review group in order to view comments on this taxonomy.  
[Click here to subscribe](#)

For your first access you will need to click the link “Click here to subscribe” to join the review group. Confirm the subscription by clicking the *Subscribe* button in the subscribe dialogue box pop up.



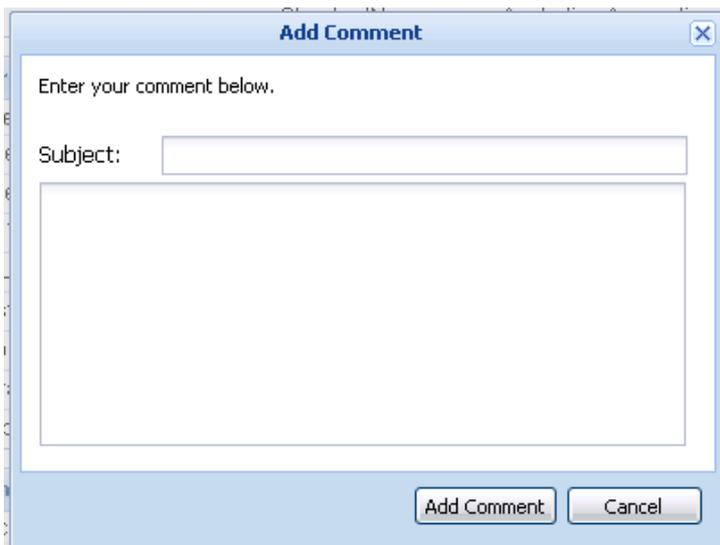
### Add New Comments

1. Login to Yeti and if it is your first time go through the subscribe steps above.
2. Select a concept and select the Details tab In the *Details Area*. The Add Comments icon  will appear next to every component which is available for commenting.



3. Enter your comments in the Add Comment dialogue box.

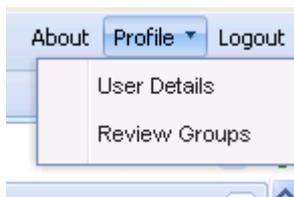
Please note that all comments are subject to moderation by Review Group Managers in accordance with the SBR Yeti Comments Moderation Guidelines (See Attachment A). Your comment will not be visible until it has been accepted by a moderator.



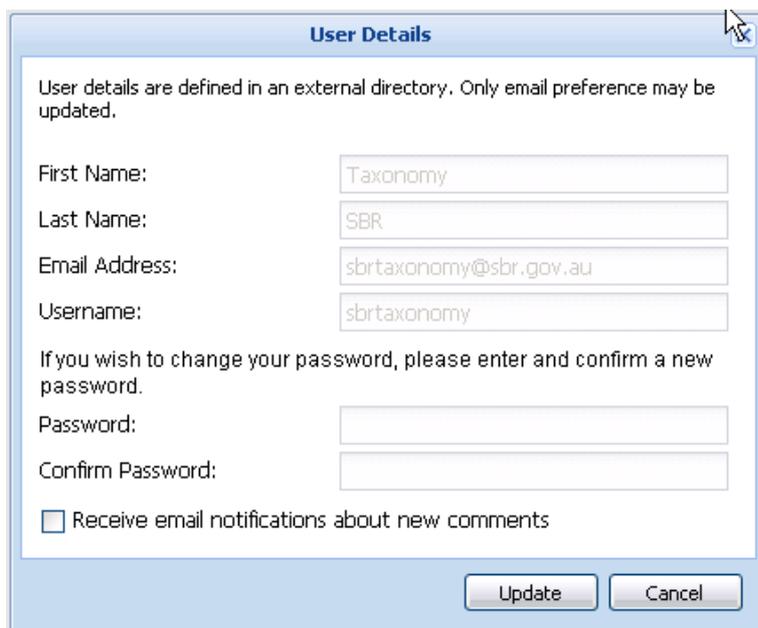
## CONFIGURATION

1. Users have the option to receive email notifications.

Click the *Profile* button above the *Details Area*, and click *User Details*.



In the *User Details* window, users can choose to receive email notifications about new comments by ticking the check box. Click *Update* to confirm.



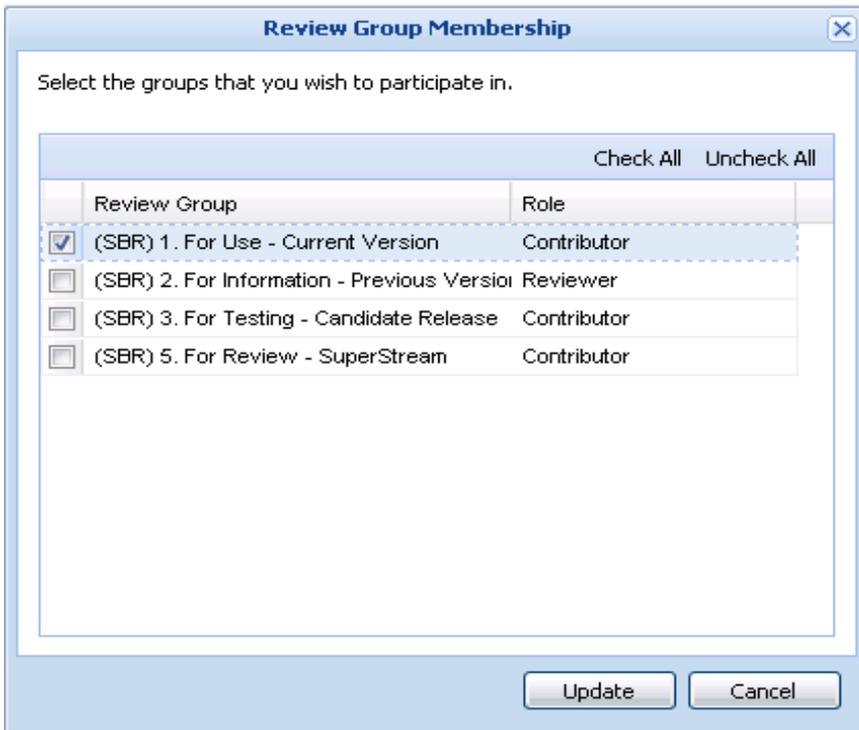
Users CANNOT modify user names or change password on Yeti. For password resets please contact the [SBR Service Desk](#) or call 1300 488 231.

2. Users can edit their membership of Review Groups.

Click the *Profile* button above the Details Area, and click *Review Groups*.



The Review Group Membership dialogue has a list of publicly available review groups to which you can choose to subscribe or unsubscribe by ticking (or un-ticking) the check boxes.



The user role will be either a reviewer (read only) or a Contributor (able to make comments).

## FURTHER INFORMATION

For user name and password queries or other assistance, please contact the SBR Service Desk:

- **1300 488 231** (Between 8:00 am and 7:00 pm AEDT Monday to Friday excluding public holidays and the SBR Christmas shutdown period)
- [SBRServiceDesk@sbr.gov.au](mailto:SBRServiceDesk@sbr.gov.au)

# ATTACHMENT A: YETI MODERATION PROCESS

## Moderation process for stakeholder comments in Yeti

SBR

The following page provides an overview of the moderation process for stakeholder comments on Yeti.

