





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).

Contact: SBR Service Desk <u>SBRServiceDesk@sbr.gov.au</u> 1300 488 231

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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

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Name	Issue Date	Version
Published on SBR Website	13/04/2012	1.0
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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 <u>SBR Taxonomy</u> <u>Architecture documentation</u>.

ACCESSING TAXONOMIES

- 1. The SBR Taxonomy Collaboration Environment is located: <u>www.taxonomy-collaboration.sbr.gov.au/yeti</u>
- 2. On the main page a dialogue box "Open Taxonomy" will appear.

Open Taxonomy	×
Please select a taxonomy.	
e 😂 SBR	~
🖻 🏠 1. For Use - Current Version	
🗑 😪 SBR AU (2012.02.18 APRA)	
🗄 😂 SBR AU (2012.02.18 exclude APRA)	
🖃 🏠 2. For Information - Previous Versions	
🖽 😂 SBR AU (2011.02.17 APRA)	=
⊞ 😂 SBR AU (2011.02.17 exclude APRA)	
🗄 😂 SBR AU (2011.02.16 APRA)	
⊞ 🥪 SBR AU (2011.02.16 exclude APRA)	
⊞ 🥪 SBR AU (2011.02.15 APRA)	
B SBR AU (2011.02.13)	
B SBR AU (2011.02.12)	
■ SBR AU (2010.02.10a)	
BBR AU (2010.02.10)	~
Open Cancel	

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.

- **4.** To open a taxonomy, click on the entry point that corresponds to the report or the SBR AU (definitional) taxonomy and click *Open*.
- e.g. SBR AU Taxonomy entry point:



5. 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.

Download Taxonomy	×
The following file is available for download.	
File Name: sbr_au_20120329_1655_ExcludesApra.zip Size: 7864 KB	
Download File	
	ancel

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

File Dow	vnload 🗙
Do you	u want to open or save this file?
	Name: sbr_au_20120329_1655_ExcludesApra.zip Type: Compressed (zipped) Folder From: www.sbr.gov.au
	Open Save Cancel
0	While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. <u>What's the risk?</u>

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 suttons.

	Detects Defen		
Network Browser	Details Relationships	ree Locations	
letwork: Presentation 📉 Lang: en 🚩	Insurance Benefits Death Ben	efit Indicator	
🖃 🌐 SBR AU Taxonomy	▲ Labels		
🖃 🦓 SBR AU Taxonomy	Type	Lang Label	
🖻 🙀 Party	Standard Label	en Insurance Benefits Death Benefit Indicator	
Party Demographics		For employment termination payment, an employment termination payment received after	er
A Party Identification A Party Interaction A Party Interaction A 1 50	Business Definition	en superanuation lump sum, a payment from a fund, after another person's death, becaus other necessary and the superanuation lump sum, a payment from a fund, after another person's death, becaus other necessary as a fund member.	For se that
■ (1	Data Element Guidance	en This field must be set to one of the enumerated values	
[101102] [101102]			
Party Links	References		
Party Preferences	This concept does not have	any references.	
🖃 🥋 Economic Management			
🗟 🙀 Superannuation	Properties		
🕀 🙀 Financial System Management	Property	Value	
King Education And Training	Name	InsuranceBenefits.DeathBenefit.Incran	
Certiary Education	Namesnace	http://sbr.gov.au//cls/cr//cr/gi/cr/gi/Cr/gi/data	
☐ Kalabour Relations	Data Type	vhrlibaalaantemType	
Arrangements		xon boleanten type	
Government Financial Assistance	XBRL Type	pooleanitem i ype	
Concessions	Substitution Group	xbrlitiem	
Grants Tox Insertiuse	Period Type	duration	
Revenue Collection	Abstract	false	
	Nillable	true	
Grant Concenting And Financials			
Financial Position	Custom Type Information		
Financial Performance	This concept does not have	a custom type definition	
Other Accounting And Financial Disclosures			
Gredit And Insurance			
General Insurance			
Insurance Benefits Beneficiary Type Code			
Tools			
Search Comments			
Search			
Local Marra	Element Labol	Metabad Value	Rock
		3	T CAR IN
🛛 🖣 Page 1 of 1 📄 🕅 🔅 Page Size 15 💰 Highlight M	atches	No :	search results to displ

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 th 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 (definitional) entry point and select an item from the *Network Browser*, in this case "Residency Tax Purposes Country Code".

Taxonomy	• A	dmin	Area								
Network	Brows	ser									~
Network:	Pres	enta	ition		~		Lang:	en		~	
😑 🌼 SBR	AU Te	axon	omy								^
😑 🗛 Ir	nforma	tion •	Classific	ation							
± 9	🐴 Bus	ines:	s Accou	nting And	Financi	ials					
± 9	Crea	dit Ar	nd Insura	ance							
ΞŸ	Eco	nomi	c Manag	ement							
± 9	Edu	catio	n And Ti	raining							
± 9	Gov	ernm	nent Fina	incial Ass	istance						
	Lab	our F	elations								
	A Part	y Dortu	Dorboar	onhioo							
		r I1	501	apriics							
		- 15	1 1001								
		r [1	01 1221								
		E	Person	Demogra	aphic De	tails	Addre	ss Cha	ange In	dicator	
			Persor) Demogra	aphic De	tails	Birth D	ate	-		_
			Persor	Demogra	aphic De	tails	Birth C	ountry	Code		
			Person	Demogra	aphic De	tails	.Birth L	ocality	Name.	Text	
			Persor	Demogra	aphic De	tails	.Birth S	tate O	r Territ	ory.Cod	:
			Person	Demogra	aphic De	tails	Citizen	iship C	ountry	Code	
			Persor	Demogra	aphic De	tails	Death	Date			
			Person	Demogra	aphic De	tails	Decea	sed In	dicator		
			Persor	Demogra	aphic De	tails	Occup	ation (Code		
			Person	Demogra	aphic De	tails	Prefer	red Se	× Code	•	
			Person	Demogra	aphic De	tails	Relatio	nship	Status	Code	
			Persor	Demogra	aphic De	tails	Sex C	ode			
			Person	I Name De	nalis Juxod Mo						
			E Persoi	norv Centr	ureu Ne ol Mene	anne		d Cont	rol 0. #	eide Au	
			Reside	ncy Centr ncy Centr	ai Mana al Mana	agem	ent An	d Cont	rol Out	side Al	
			Reside	ncy Domi	cile Text	t		a com	. o. ou		
			Reside	ncy Non F	Residen	- t Full	Period	Indica	tor		
			Reside	ncy Tax F	urpose	s Co	untry (Code			
			Reside	ncy Tax F	Purpose	s Co	untry D	escrip	tion		~
<				ll			j			>	

2. Details Area

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

Details Relationships Tree	e Locations		
Residency Tax Purposes Country	y Code	(9
Labels			1
Туре	Lang Label		
Standard Label	en Residency Tax Purposes Country Code	<u>_</u>	
Business Definition	en The code applicable to the payee's country of residence for tax purposes.	Ģ	_
			i
References			
Type	Reference		
Industry Standard Reference	StandardReference Part 1: Country Code Alpha-2 StandardName ISO3166	A	
Properties			
Property	Value		
Name	Residency.TaxPurposesCountry.Code		
Namespace	http://sbr.gov.au/icls/py/pyde/pyde.02.08.data		
Data Type	dtyp.02.13:sbrCountryNameCodelternType	9	
XBRL Type	stringItemType	9	
Substitution Group	xbrli:item	9	
Period Type	duration	A	
Abstract	false	G.	
Nillable	true	<u>a</u>	
Custom Type Information			
Facet Name	Value		
enumeration	ad		
enumeration	ae		
enumeration	af	G.	
enumeration	ag	<u> </u>	
enumeration	ai	G.	
enumeration	al	<u>e</u>	~
6 J		>	

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 \frown 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.

Taxonomy * Admin Area			About Profile 🔻 Logout
Network Browser «	Details Relationships Tre	e Locations	
Network: Presentation 💉 Lang: en 💉	Residency Tax Purposes Count	y Code	A
Person Demographic Details Birth Locality Name Text	Labels		
Person Demographic Details Birth State Or Territory.Coc	Туре	Lang Label	
🗧 Person Demographic Details Citizenship Country Code	Standard Label	en Residency Tax Purposes Country Code	
Person Demographic Details Death Date	Business Definition	en The code applicable to to prove s country of residence for tax purposes.	<u>A</u>
Person Demographic Details Occupation Code	References		
Person Demographic Details Preferred Sex Code	Туре	Reference	Server 1
Person Demographic Details Sex Code Person Demographic Details Sex Code	Industry Standard Reference	StandardReference Part 1: Country Code Alpha-2 StandardName ISO3166	€.
I Terson Unstructured Name	Properties		
Residency Central Management And Control Outside Au	Property	Value	
Residency Central Management And Control Outside At	Name	Residency.TaxPurposesCountry.Code	
Residency Non Resident Full Period Indicator	Namespace	http://sbr.gov.au/icls/py/pyde/pyde.02.08.data	
Residency Tax Purposes Country Code	Data Type	dtyp.02.13:sbrCountryNameCodeItemType	
Residency Tax Purposes Country Description	XBRL Type	stringItemType	(A)
Residency Tax Purposes Organisation Status Code	Substitution Group	xbrli:item	
G R Party Identification	Period Type	duration	(A)
Electronic Funds Transfer Details Client Initiated Account F	Abstract	false	<u> </u>
Electronic Funds Transfer Details Payment Reference Num	Nillable	true	€
Financial Institution Account eLockbox Account Number	Custom Type Information		
Financial Institution Account Financial Institution Account N	Facet Name	Value	
Financial Institution Account Financial Institution Branch Nat	enumeration	ad	G 🗸
<u><</u>	<		8
Tools			*
Search Comments			
residency Search -Share	d Searches 💙 Save De	iste.	
Local Name	Element Label	Matched Value	Rank
Residency.Domicile.Text	Residency Domicile Text	Residency Domicile Text	100%
Residency.TaxPurposesCountry.Code	Residency Tax Purposes Co	untry Code Residency Tax Purposes Country Code	87%
Residency.TaxPurposesCountry.Description	Residency Tax Purposes Co	untry Description Residency Tax Purposes Country Description	87%
CountryOfResidencyCFCClassificationDimension	Country Of Residency CFC (Classification Dimensic Country Of Residency CFC Classification Dimension	87%
Residency.TaxPurposesCountry.Code	Residency Tax Purposes Co	untry Code Residency Tax Purposes Country Code	87%
Residency.CentralManagementAndControlOutsideAustralia.Indicator	Residency Central Managem	ent And Control Outsi- Residency Central Management And Control Outside Australia Indicator	75%
Page 1 of 1 🕨 🖉 🛟 Page Size 15 🔤 Highlight Mate	hes		Displaying matches 1 - 15 of 15

The results are displayed in order of relevance. Users can click the ^{SHighlight 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:

	Open Taxonomy	×
Plea	ase select a taxonomy. To see more taxonomies, please <u>log in</u> .	
÷	SBR	~
	1. For Use - Current Version	

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

				About	Login
	Details	Relationships	Tree Locations		
No Concept Selected			6		
	Labels		~		
	Reference	5			

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: <u>www.taxonomy-collaboration.sbr.gov.au/content/public</u>

-	Login	×
Please provide logir) details.	
Username:		
Password:		
lf you have forgotten	your password you can <u>reset it</u> .	
	Submit Cancel	

Users CANNOT reset passwords on Yeti. For password resets please contact the <u>SBR Service</u> <u>Desk</u> 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.

About Drofile T Locout

Т	ools		
	Search	Comments	

You must be a member of this review group in order to view comments on this taxonomy. <u>Click here to subscribe</u>

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.

Subscribe	×
You will be subscribed to the review group: 1. For Use - Current Version	
Subscribe Cancel]

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.

		About Fronie Cogot
Details Relationships Tree	Locations	
esidency Tax Purposes Country	Code	Ģ
Labels		
Туре	Lang Label	
Standard Label	en Residency Tax Purposes Country Code	
Business Definition	en The code applicable to ttop ayee's country of residence for tax purposes.	
References		
Туре	Reference	
Industry Standard Reference	StandardReference Part 1: Country Code Alpha-2 StandardName ISO3166	⊊-
Properties		

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.

	Add Comment	×
Enter your co	mment below.	
Subject:		

CONFIGURATION

1. Users have the option to receive email notifications.

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

ł	About	Profile 🔻	Logout
User (User Detail:	3
		Review Gro	oups
_			

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

	User Details	
User details are defined in an external directory. Only email preference may be updated.		
First Name:	Taxonomy	
Last Name:	SBR	
Email Address:sbrtaxonomy@sbr.gov.auUsername:sbrtaxonomy		
		lf you wish to change you password.
Password:		
Confirm Password:		
Receive email notifications about new comments Update Cancel		

Users CANNOT modify user names or change password on Yeti. For password resets please contact the <u>SBR Service Desk</u> 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.

	Review Group Membe	rship	×			
Selec	Select the groups that you wish to participate in.					
		Check All	Uncheck All			
	Review Group	Role				
	(SBR) 1. For Use - Current Version	Contributor				
	(SBR) 2. For Information - Previous Version	Reviewer				
	(SBR) 3. For Testing - Candidate Release	Contributor				
	(SBR) 5. For Review - SuperStream	Contributor				
		Undate	Cancel			
			Cancor			

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)
- <u>SBRServiceDesk@sbr.gov.au</u>

ATTACHMENT A: YETI MODERATION PROCESS

Moderation process for stakeholder comments in Yeti

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



SBR