

# CHECKPOINT - QUICK REFERENCE

## Logging in to Checkpoint

1. Launch your browser and enter the Checkpoint address in the browser location bar:

<http://checkpoint.thomsonreuters.com>

The **Checkpoint Login** screen appears.

**Note:** Bookmark this page or add it to your Favorites so you will not have to retype the URL every time you want to access Checkpoint.

2. Enter your **User Name** and **Password**, and then click **Login**.

The Checkpoint screen that appears depends on the Login and Search Practice Area settings in the General Settings Options.

**Note:** You can use your user name and password to open only one Checkpoint session at a time. Select the **Save Name/Password** check box to save your login information. You will not be prompted to enter your User Name and Password on future Checkpoint sessions.

### Ending a Session Remotely:

Checkpoint does not permit multiple logins with the same User ID. If you are logged into Checkpoint on another machine or browser and attempt to login, Checkpoint will provide an option for you to close the original session and continue the login process.

For support, go to <http://support.rg.thomsonreuters.com>, or call 800.431.9025.

## Using the Home Screen

Checkpoint's **Home** screen provides quick links to Checkpoint tools and documents, access to current news of interest to Checkpoint subscribers, updates related to Checkpoint features and content, and easy access to training and support.

The screenshot shows the Checkpoint Home screen interface. At the top, there is a navigation bar with links for HISTORY, FOLDERS, FLAGGED (4), OPTIONS, HELP, and SIGN OUT. Below this is a secondary navigation bar with HOME, SEARCH, TABLE OF CONTENTS, NEWS, TOOLS, and LEARNING. A 'Site Navigator' search box is on the right. The main content area is divided into several sections:

- 1** A 'Current View' dropdown menu set to 'Standard'.
- 2** A 'MY QUICK LINKS' section with a list of links and an 'edit' button.
- 3** A 'TRAINING AND SUPPORT' section with links to training and support resources.
- 4** A 'TODAY'S HEADLINES' section with news items and a 'NEW IN MY SUBSCRIPTION' section below it.
- 5** A 'TRACK IT' section showing 'No Track It Results' and a 'SCHEDULED SEARCHES' section with a message 'You have not set up any scheduled searches.'
- 6** A 'QUICK SEARCH' section with a 'Keywords:' input field, radio buttons for 'Terms & Connectors' and 'Natural Language', a 'Choose Source Set:' dropdown menu, and a 'Search' button.

- 1** Choose from several **Home** screen views that organize content by practice area. Each view's layout and content can be modified to match your preferences. Create your own custom view consisting of selected content panes.
- 2** **My Quick Links** provides quick access to frequently used areas of Checkpoint. You can tailor **My Quick Links** to your specific needs by modifying the list to reflect your areas of interest and frequent use.
- 3** The **Training and Support** links make it easy to access instructor-led and self-study product training, user guides and other reference materials, support and training news, support contact information, and Checkpoint user options.
- 4** Keep up-to-date with news and product developments. Consult **Today's Headlines** for links to current news. Review **New in My Subscription** to learn about new features and enhancements specific to your version of Checkpoint.
- 5** Use **Home** screen features to display the results of **Scheduled Searches** and ongoing citation tracking (**Track It**). Perform a **Quick Search** on a predefined source set.
- 6** Enter your keywords in the **Quick Search** box and click **Search** to perform a keyword search.

## Using the Search Screen

The **Search** screen provides a launch point from which to perform keyword searches on selected sources in several practice areas. Use sidebar search templates for quick access to specific research targets.

- 1 Select a **Practice Area** to use sources and search tools specific to an area of research. Practice areas include **Federal**, **State & Local**, **Estate Planning**, **Pension & Benefits**, **International**, **Payroll**, and **Accounting, Audit & Corp Finance**.
- 2 To perform a keyword search, enter search terms, select the sources to search, and then click **SEARCH**. The search **AutoComplete** feature will suggest keywords as you type in the field.
- 3 Select a keyword format. A **Terms & Connectors search** lets you provide one or more keyword terms. A **Natural Language search** lets you use conversational phrasing to state your query as a question.
- 4 Open Checkpoint's **Thesaurus/Query Tool** to enhance your keywords with such features as a spell checker, a thesaurus of alternative terms, a list of connector symbols, and previously used keyword combinations.
- 5 Select a search template to perform a search by filling in requested information. For example, use **Find by Citation** to request a code section from an official documentation source.

## Using Search Connectors

### Search Connectors

To locate documents:	Use:	Example:
containing any of my keywords	OR,	funding OR deficiency
containing at least one instance of each of my keywords	space, &, AND	funding deficiency
that contain one keyword but exclude another	^, NOT	funding NOT deficiency
containing my exact phrase	" "	"funding deficiency"
containing variations of my keywords	* (asterisk)	deprecia*
disabling automatic retrieval of plurals and equivalencies	# (pound sign)	#damage (retrieves only damage, not damages)
containing single-character variations	? (question mark)	s????holder (retrieves stockholder, shareholder)
containing compound words	- (hyphen)	e-mail (retrieves e-mail e mail, email)
containing terms that occur at least # times	atleast#()	atleast5(funding)

To search for a word or phrase:	Use:	Example:
within n words of another (in any order)	/# (where # equals number)	"disclosure exception" /7 negligence
within n words of another (in exact order)	pre/# (where # equals number)	"disclosure exception" pre/7 negligence
within the same sentence (20 words) as another (in any order)	/s	"disclosure exception" /s negligence
within the same sentence (20 words) as another (in exact order)	pre/s	"disclosure exception" pre/s negligence
within one paragraph (50 words) as another (in any order)	/p	"disclosure exception" /p negligence
within one paragraph (50 words) as another (in exact order)	pre/p	"disclosure exception" pre/p negligence

## Using the Document Screen

The **Document** screen provides a format for viewing Checkpoint content that is organized into a single document, with various tools and features for saving, sharing, linking, and navigating.

The screenshot displays the Checkpoint interface for a document titled "Reg §1.172-1 Net operating loss deduction." The interface includes a top navigation bar with options like HISTORY, FOLDERS, FLAGGED (4), OPTIONS, HELP, and SIGN OUT. A left sidebar contains menus for CONTENTS, SEARCH TOOLS, DOCUMENT LIST, LINKS, and OUTLINE. The main content area shows the document title, a "Navigate by:" field set to "Keyword", and a row of source links including Expl, Annot, FTC, IRC, Com Rpts, Planning, Tax Desk, AdvAnnot, Prior Regs, WG&L Treatises, and BNA. The document text features yellow highlighting on the words "loss deduction" and "losses".

- 1 Sidebar menus, when applicable, provide access to related documents, navigation to sections within the document, or additional search options. The names of viewed documents appear in purple text. Every 24 hours at midnight, Checkpoint refreshes document links and all purple text changes back to blue.
- 2 Document tools include **Print, Export, E-mail, Save, Open in New Window, Selected Text Option, Show Permalinks, Full Screen, Document Display Options, Flag this document, and Add Note.**
- 3 Use the **Navigate by** field and arrow buttons to advance to the next **Document** found by your search, the next document listed in the **Table of Contents**, the next occurrence of a **Keyword**, or the next **Best** section (when you are using a **Natural Language** search).
- 4 When applicable, top-line links provide access to supporting documentation from various primary and editorial sources. Also, look for side-line links embedded in the document.
- 5 Keyword occurrences appear with yellow highlighting.

## Using the Table of Contents Screen

Checkpoint's **Table of Contents** provides access to all of the sources available to you through your subscription. Content is organized hierarchically into broad practice area categories. You can drill down through levels of content to find individual documents.











- 1 Click the "+" symbol next to a title to view its contents. Click a title to generate a **Table of Contents** screen listing only the title and its contents.
- 2 Click the number of the **Table of Contents** level you want to view. Level 1 displays only the high-level **Table of Contents** source titles. Level 2 opens each source to the next content level. Level 3 opens sources to one further level.
- 3 Perform a keyword search by selecting sources at any level, entering keywords, and then clicking **Search**. Both **Terms & Connectors** and **Natural Language** searches are available. Use the **Thesaurus/Query Tool** for advanced search features.
- 4 The **Jump To** options provide navigation to content and tools, including **Titles**, which lets you create a custom set of links to topical sections of the **Table of Contents**, and **Form/Line Finder**, which lets you search tax form guidance by entering a tax year, form number, and line number.
- 5 Print any document in the **Table of Contents** by clicking the **Print** tool next to the document title. Press the **CTRL** key on your keyboard to select up to 15 documents at a time to print.

## Using the News Screen

The **News** screen provides the latest editions of several subscription-based news services in the areas of tax, accounting, and finance. Most of the news services provide access to earlier editions and e-mail delivery options.

- 1 Headlines, summaries, or opening paragraphs are generally provided for each news article. In some newsletters, the headline is a link to the full article. In others, a "document" symbol at the end of the paragraph links you to the full article.
- 2 Select from news services included in your Checkpoint subscription. Titles include **RIA Daily Updates, Accounting & Compliance Alert, PPC's Daily Update, BNA Daily Tax Report, BNA Int'l Tax Monitor, IBFD Tax News Service, Towers Watson, EBIA Weekly, and Sabrix VAT News.**
- 3 Click a date on the **Date** drop-down list, if available, to access earlier editions.
- 4 Advance to a section of the newsletter by selecting the section title from the **Outline** on the left navigation pane.
- 5 Click **Set Display/E-Mail Preferences** and arrange to receive any of your subscribed newsletters by e-mail. Options include receiving a **Daily Update** version or a **Complete Newsletter** version offered on a less frequent schedule. This option is not available for all newsletters.

## Legend

Icon	Description
	Click to view a brief description of the tool or feature.
	Hover on this icon to view your location in the document.
	Shows additional material related to the document you are reading.
	Displays the source in table of contents format.
	Indicates that the document is currently in the Flagged document list.
	Indicates a code or regulation subsection with multiple effective dates.
	Indicates editorial commentary is available.
	Allows you to create a desktop icon.
	Displays a popup with a brief description of the source.
	Indicates the document has a note attached to it.