


# CHECKPOINT - QUICK REFERENCE

## Logging in to Checkpoint

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


<http://checkpoint.tr.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.

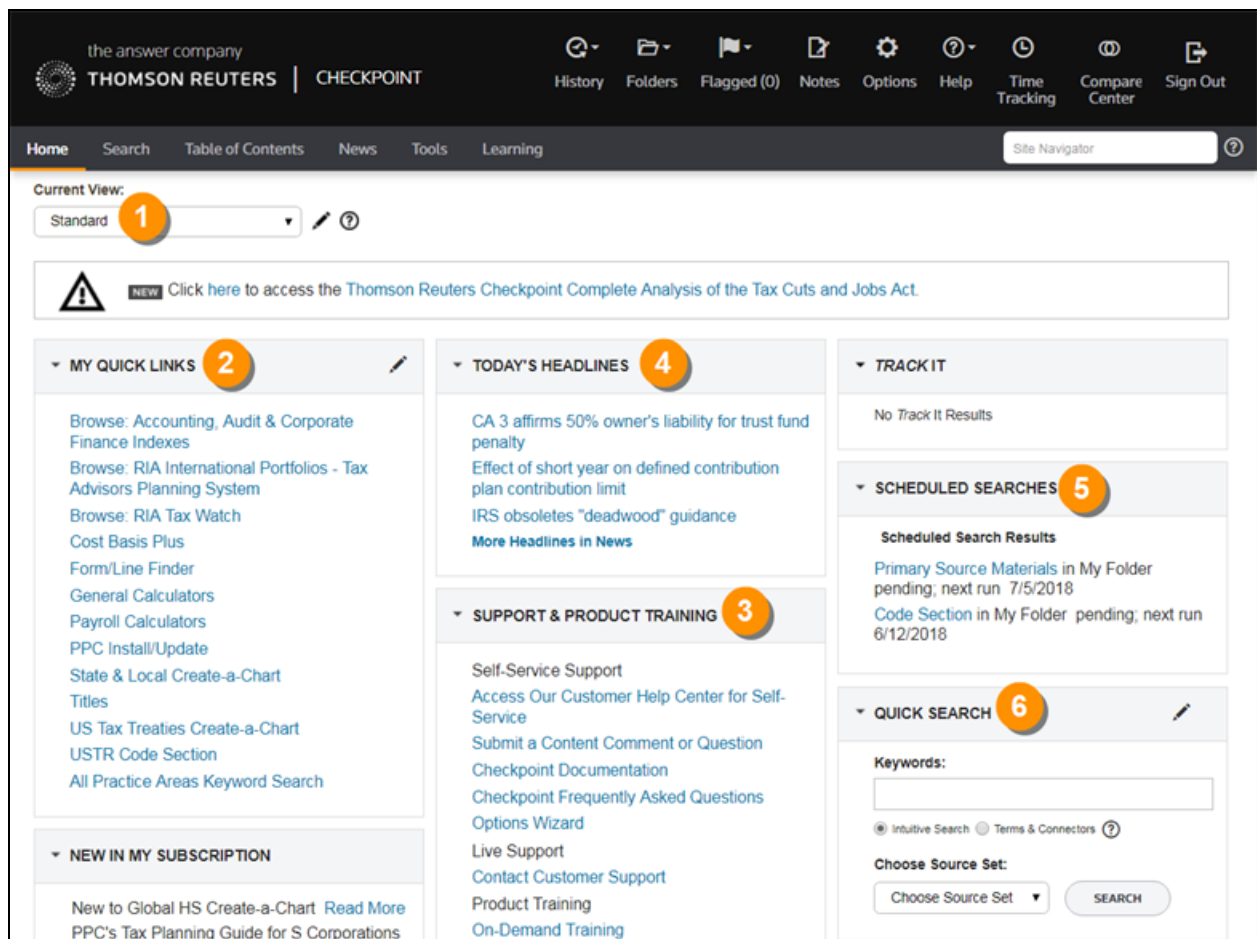
## Ending a Session Remotely

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.checkpoint.tr.com>, or call 800.431.9025.

## Using the Home Screen

The **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. You can change the content and customize the features as needed.

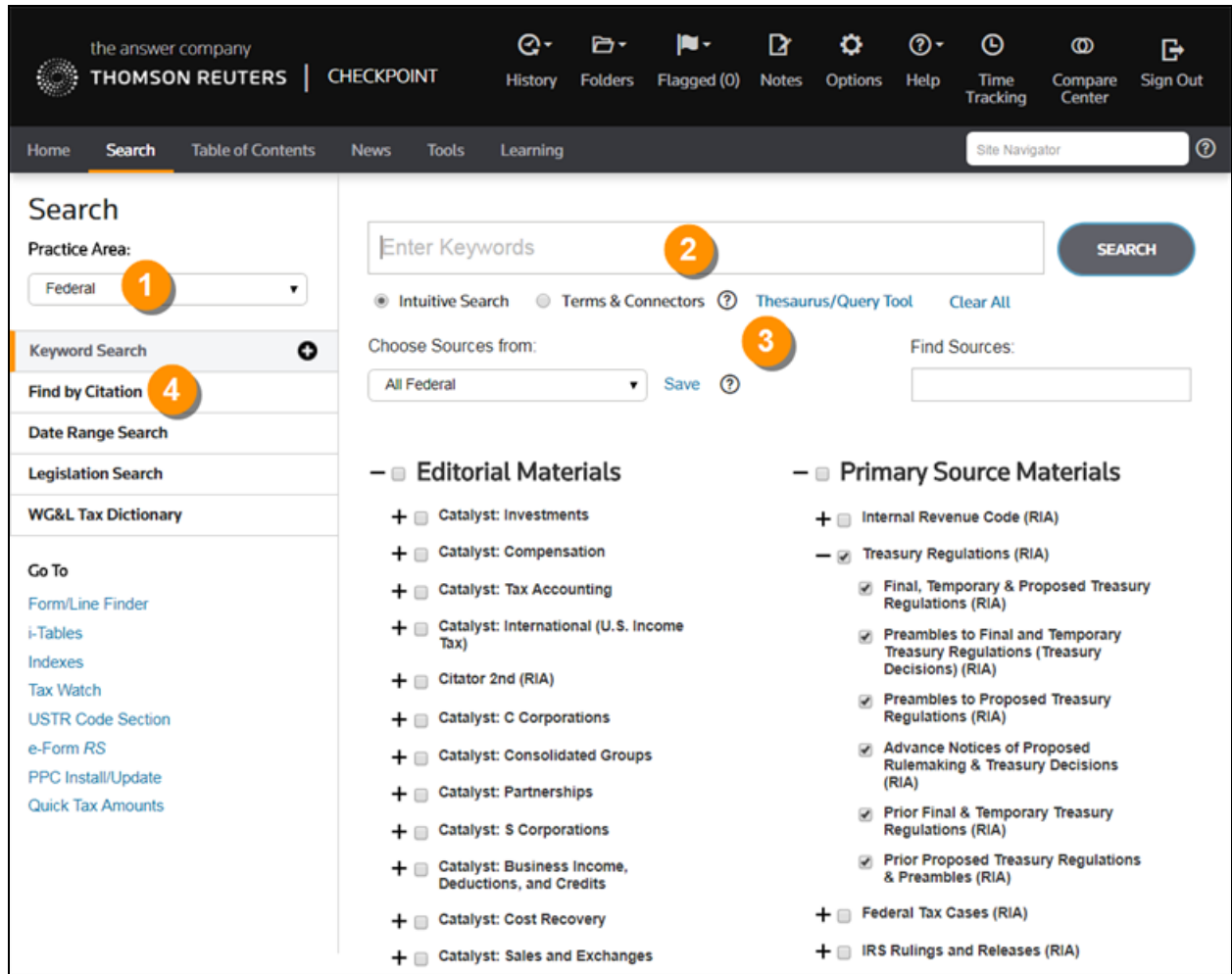


|          |   |
|----------|---|
| <b>1</b> | Choose from several <b>Home</b> screen views that organize content by practice area. Each view's layout and content can be modified to match your preferences. Create your own view consisting of selected content panes. |
| <b>2</b> | <b>My Quick Links</b> provides quick access to frequently used areas of Checkpoint. You can tailor <b>My Quick Links</b> to your specific needs by modifying the list to reflect your areas of interest and frequent use. |
| <b>3</b> | The <b>Support &amp; Product Training</b> 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 <b>Today's Headlines</b> for links to current news. Review <b>New in My Subscription</b> to learn about new features and enhancements specific to your version of Checkpoint.   |
| 5 | Use <b>Home</b> screen features to display the results of <b>Scheduled Searches</b> , ongoing citation tracking ( <b>Track It</b> ) and proposed legislation being followed ( <b>Follow It</b> ).   |
| 6 | Enter your keyword in the <b>Quick Search</b> box and click <b>Search</b> to perform a keyword search. You can perform a <b>keyword search</b> in two ways: <b>Intuitive Search</b> recognizes questions, common phrases, connectors, or citations, and interprets your query accordingly to retrieve the most relevant results, including relevant variations. <b>Terms &amp; Connectors</b> will limit your search to the exact words you typed, without any variations. The search <b>AutoComplete</b> feature will suggest keywords as you type in the field. You can also perform a <b>Quick Search</b> on a predefined source set you create by selecting from the <b>Choose Source Set</b> drop-down list. |

## 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 the left navigation bar to access customized search templates and tools based on the practice area.



|          |  |
|----------|--|
| <b>1</b> | Select a <b>practice area</b> to use sources and search tools specific to an area of research. Practice areas include <b>Federal, State &amp; Local, Estate Planning, Pension &amp; Benefits, International Tax, International Trade, Payroll, and Accting, Audit &amp; Corp Finance</b> .   |
| <b>2</b> | To perform a <b>keyword search</b> enter search terms, select the sources to search, and then click <b>Search</b> . You can perform a <b>keyword search</b> in two ways: <b>Intuitive Search</b> recognizes questions, common phrases, connectors, or citations, and interprets your query accordingly to retrieve the most relevant results, including relevant variations. |

|   |   |
|---|---|
|   | <b>Terms &amp; Connectors</b> will limit your search to the exact words you typed, without any variations. The search <b>AutoComplete</b> feature will suggest keywords as you type in the field.             |
| 3 | Open the <b>Thesaurus/Query Tool</b> 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. |
| 4 | Select a search template to perform a search by filling in requested information. For example, use <b>Find by Citation</b> to request a code section from an official documentation source.                   |

## Using Search Connectors

| To locate documents:                                       | Use:              | Example:   |
|--|-------------------|--|
| containing any of my keywords                              | OR,               | funding OR deficiency                            |
| containing all of my keywords                              | space, &, AND     | funding & deficiency                             |
| that contain one keyword but exclude another               | ^, NOT            | funding ^ 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(customer)                               |

## Using Connectors in Intuitive Search

If the Terms & Connectors search method is selected, the AND, SPACE, or & connectors can all be used to require more than one term in each of the documents of your search results. However, if Intuitive Search is left as the default search method, Checkpoint will read the word "AND" and any SPACE as it would any other word used in your query. Although the most

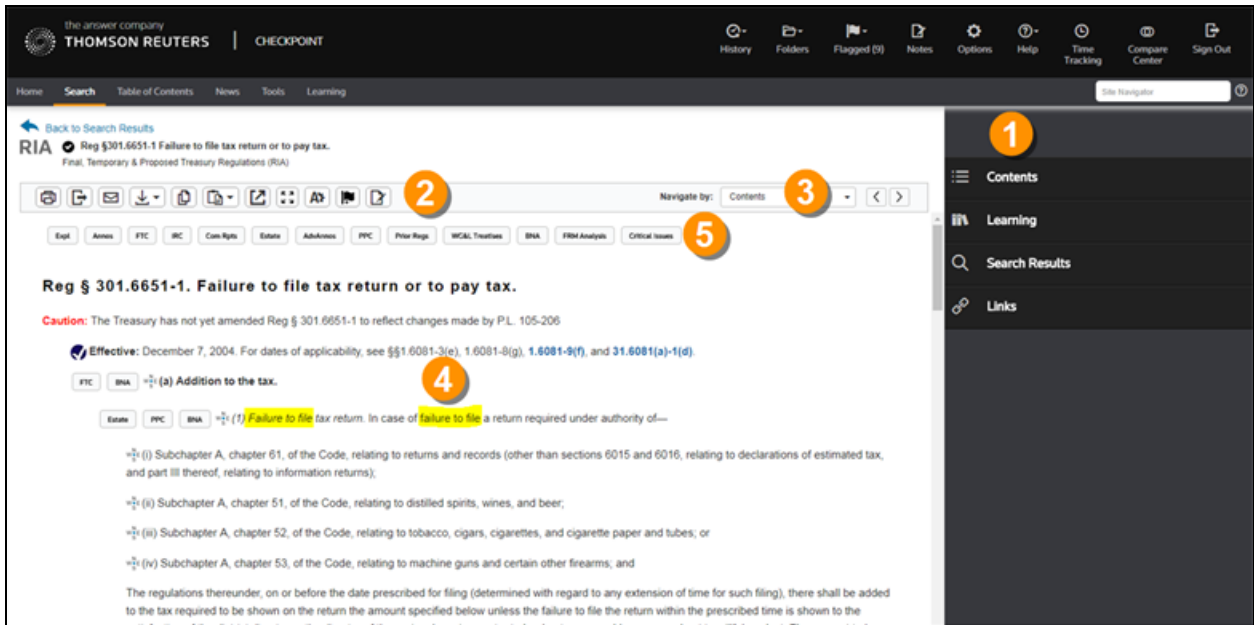
relevant documents are likely to have all words used, you may get results that have only most of the words.

Also, when using the Intuitive Search method, the use of quotations to search for a phrase will find the most relevant documents that include the exact phrase and relevant variations that contain the keywords within 3 words of one another.

| 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

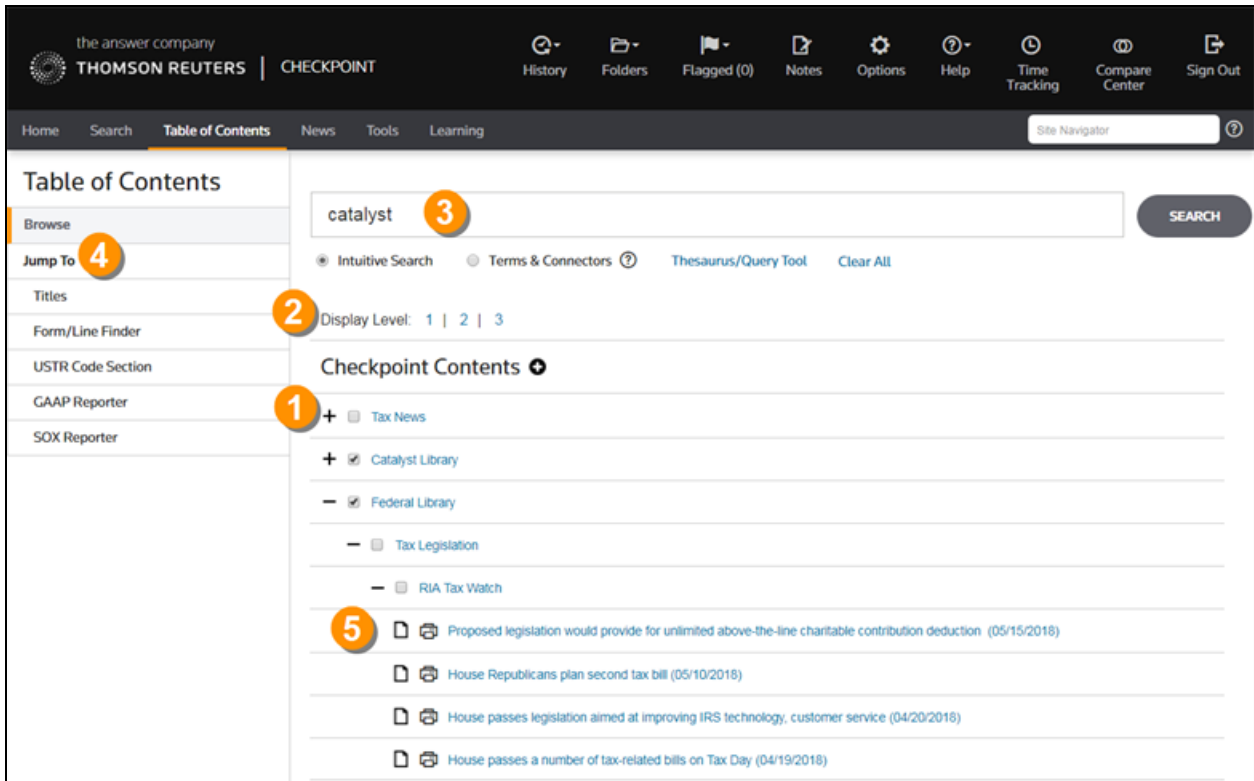
The **Document** screen provides the format for viewing and managing Checkpoint documents, with various tools and features for navigating, saving, printing, sharing, exporting, adding notes, and flagging the content. You can also highlight document text and save the highlighted text as a note.



|   |   |
|---|---|
| 1 | Within a document, you can use the Context Panel on the right to take advantage of additional navigation and features. The available tabs listed in the Context Panel will depend on the document displayed and how you arrived at that document (by Keyword or Table of Contents). |
| 2 | <b>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, Add Note, and Reset view.</b>  |
| 3 | Use the <b>Navigate by</b> field and arrow buttons to advance to the next <b>Best</b> result or <b>Document</b> found by your search, the next document listed in the <b>Table of Contents</b> , or the next occurrence of a <b>Keyword</b> .                                       |
| 4 | Keyword occurrences appear with yellow highlighting throughout the open document.   |
| 5 | Use the top line and side line link buttons that appear across the top of a document or embedded within the document to link to related documents in the <b>Links</b> section of the <b>Context Panel</b> .   |

## Using the Table of Contents Screen

The **Table of Contents** screen, accessed from the menu bar on Checkpoint, 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.



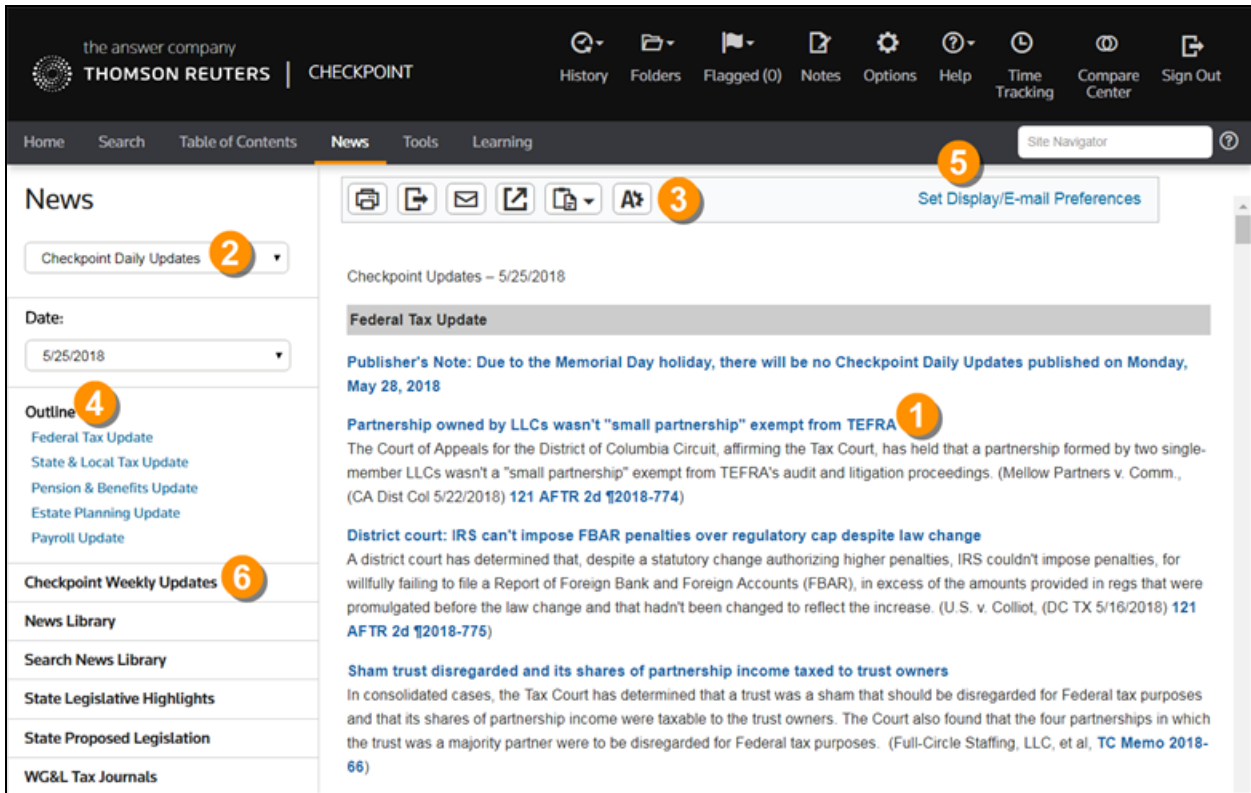
|          |   |
|----------|---|
| <b>1</b> | Click the "+" symbol next to a title to view its contents, or click the title name to display a <b>Table of Contents</b> screen listing the title and its contents.   |
| <b>2</b> | Click the number of the <b>Table of Contents</b> level you want to view. Level 1 displays only the high-level <b>Table of Contents</b> source titles. Level 2 expands sources to the next content level. Level 3 expands sources even further.  |
| <b>3</b> | To perform a <b>keyword search</b> enter search terms, select the sources to search, and then click <b>Search</b> . You can perform a <b>keyword search</b> in two ways:<br><b>Intuitive Search</b> recognizes questions, common phrases, connectors, or citations, and interprets your query accordingly to retrieve the most relevant results, including relevant variations. <b>Terms &amp; Connectors</b> will limit your search to the exact words you typed, without any variations. The search <b>AutoComplete</b> feature will suggest keywords as you type in the field. |







|                 |   |
|-----------------|---|
| <p><b>4</b></p> | <p>The <b>Jump To</b> options provide navigation to content and tools, including <b>Titles</b>, which lets you create a custom set of links to topical sections of the <b>Table of Contents</b>, and <b>Form/Line Finder</b>, which lets you search tax form guidance by entering a tax year, form number, and line number.</p> |
| <p><b>5</b></p> | <p>Print documents from the <b>Table of Contents</b> by clicking the print icon next to a document in the list. To <b>print multiple documents</b>, hold down the <b>CTRL</b> key on your keyboard and click on the Print icon next to the documents you want to print.</p>   |

## Using the News Screen











The **News** screen provides the latest news updates in the areas of tax, audit, accounting, trade, corporate finance, and employee benefits. Most of the news services provide access to earlier editions and e-mail delivery options.



|                 |  |
|-----------------|--|
| <p><b>1</b></p> | <p>Headlines, summaries, or opening paragraphs are generally provided for each news article. In some news sources, 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.</p> |
| <p><b>2</b></p> | <p>Select from news sources included in your Checkpoint subscription. Available news sources may include (depending on your subscription) <b>Checkpoint Daily Updates</b>,</p>   |

|   |  |
|---|--|
|   | <b>News &amp; Insight, Accounting &amp; Compliance Alert, PPC's Daily Update, IBFD Tax News Service, Willis Towers Watson, EBIA Weekly, AAEI International Trade Alert, TR Global Indirect Tax Update, and EY Tax News.</b> Click a date on the <b>Date</b> drop-down list, if available, to access earlier editions.        |
|  | <b>Document tools</b> let you print, export, e-mail, and manage the news content.  |
|  | Advance to a section of the news update by selecting the section title from the <b>Outline</b> on the left navigation bar.   |
|  | Click <b>Set Display/E-mail Preferences</b> and arrange to receive any of your subscribed news updates by e-mail. Options include receiving a <b>Daily Update</b> version or a <b>Weekly Update (or Complete Newsletter)</b> version offered on a less frequent schedule. This option is not available for all news sources. |
|  | Click <b>Checkpoint Weekly Updates</b> to view all articles from (depending on your subscription) the Federal Tax, State & Local Tax, Estate Planning, Pension & Benefits, and Payroll Updates for the most recently completed week (Monday through Friday).   |

## Legend

| Icon  | Description   |
|---|---|
|  | Click the help icon to view a brief description of the tool or feature.                                       |
|  | Hover on the compass icon to view your location in the document.  |
|  | Click top line or side line link buttons to view additional material related to the document you are reading. |
|  | Click the book icon to display 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.                                      |
|  | The Checkpoint logo Indicates editorial commentary is available.  |
|  | Click the permalink icon to create a desktop icon.  |
|  | Click the information icon to display a pop-up window with a brief description of the source.                 |
|  | Indicates the document has a note attached to it.   |