

Checkpoint® - Quick Reference

Logging in to Checkpoint

<http://checkpoint.riag.com>

To save your login name and password, select the **Save Name/Password** option on the login screen.


Speedlink

Speedlink provides access to key Checkpoint features in one easy-to-use tool, making searching for information faster by bypassing the need to log in every time you want to perform a search or move to a related area.

<http://ria.thomson.com/speedlink>

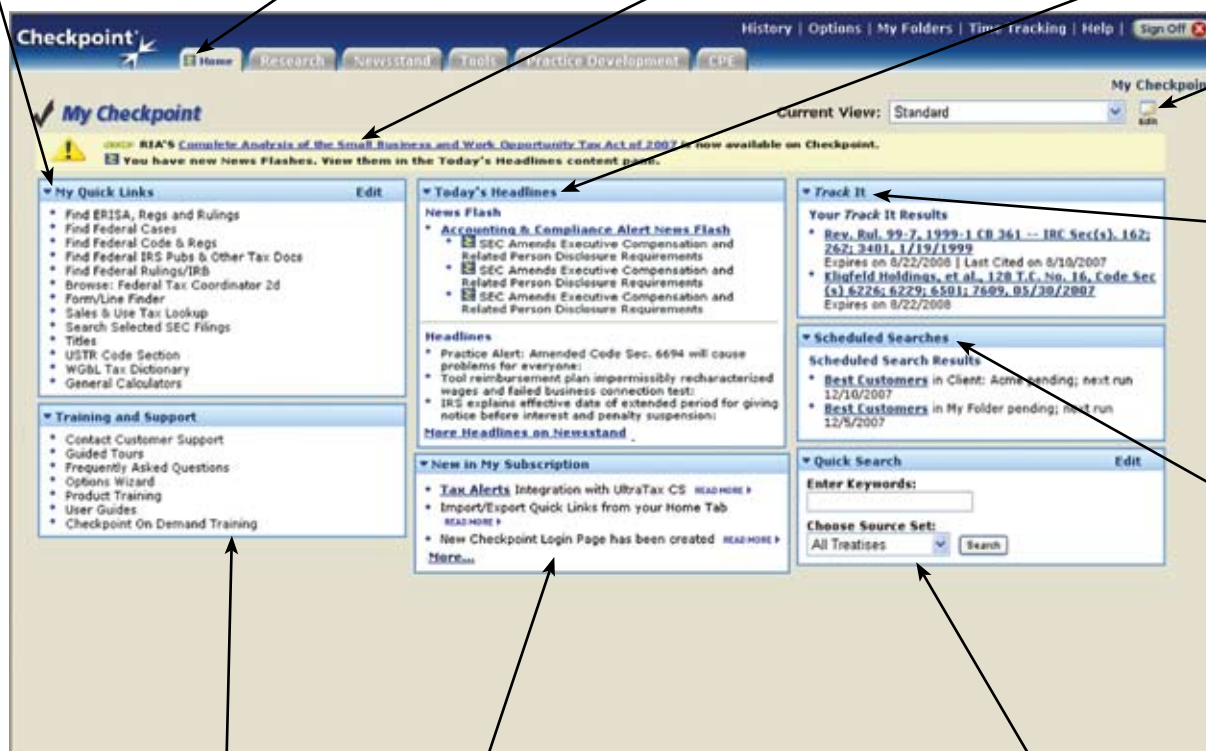
Home Tab (My Checkpoint)

My Quick Links provides a set of customizable links to your frequently used Checkpoint sources and locations.

Flash  appears whenever there are new news updates. (Select a **News Flash** item in the *Today's Headlines* pane.)

The **New!** warning banner displays whenever updated content or scheduled search results are available in your subscription. Click the hyperlink to view details.

Today's Headlines displays recent news headlines from the *RIA Daily Updates*. You can view more headlines from the **Newsstand** tab.



Click **Edit** to modify your current **My Checkpoint** view or to create a new view.

Click a link in the **Track It** pane, which notifies you when a Case Law document or a ruling you are tracking has been referenced by new content.

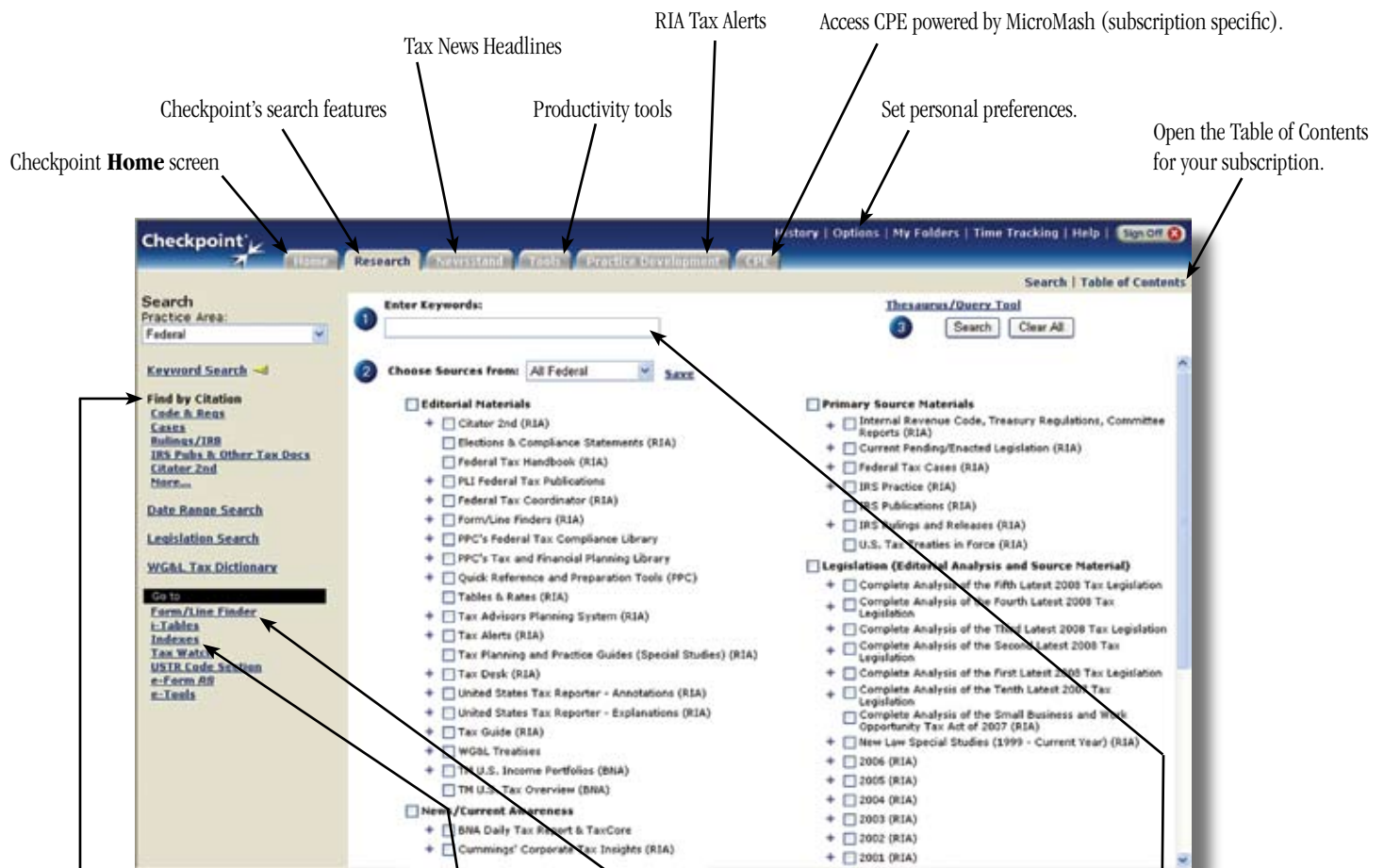
Click a link in the **Scheduled Searches** pane to see the results of any scheduled searches.

Training and Support provides a set of links to product training, user guides, support contact information and interactive guided tours.

What's New in My Subscription displays new Checkpoint features and content that have recently been added to your subscription. Click **Read More** to view more information about a headline.

Select **Quick Search** to perform some of your searches without having to access the Research tab. (You can choose from any of the source sets in the **Choose Source Set** drop-down menu for your search.)

Searching and Navigation



To find a document when you know the citation, click one of the links under **Find by Citation**. Complete the search template and click **Search** to begin the search.

Use **Form/Line Finder** to search Checkpoint content, based on a line on a tax return form. Click **Form/Line Finder** and fill in the template information. Click **Search** to begin the search.

To access an A-Z listing of topics, click **Indexes**.

To execute a keyword search:

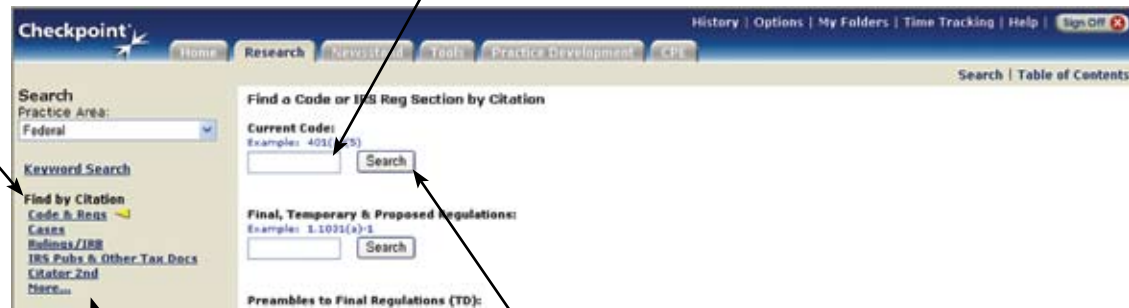
1. Enter your search keywords in the **Enter Keywords** field.
2. Select sources from the source list by clicking the check box next to the source name.
3. Click **Search**.

Other Ways to Search

Citation Searching

Use Checkpoint's pre-designed citation search templates to retrieve a specific federal code section, state statute, case decision, or revenue ruling.

In the citation keyword field, enter the citation you want to find. Use the example as a guideline for formatting your citation.



Each practice area has different citation templates that you can access under **Find By Citation**.

Click **Search** to retrieve your search results.

Table of Contents and Index Searching

Select **Titles** to create and save a list of your most commonly used sources for easy recall and review. All source titles that you subscribe to will appear in alphabetical order.

Click the + symbol to expand a Table of Contents category. Select the check box next to the source name to include it in your search.

Displays the Table of Contents level you are currently viewing.



Use the **Browse** links to expand or collapse the different levels of the Table of Contents.

Indexes provide an A-Z listing of topics in several source sets. You can also search specific indexes from the **Table of Contents** screen. Expand the index listing and select the applicable check boxes to include them in your search.

Productivity Tools

Checkpoint offers more than 200 **Calculators**, which provide quick answers when you have to perform a calculation to determine if a particular set of facts pertains to a client.

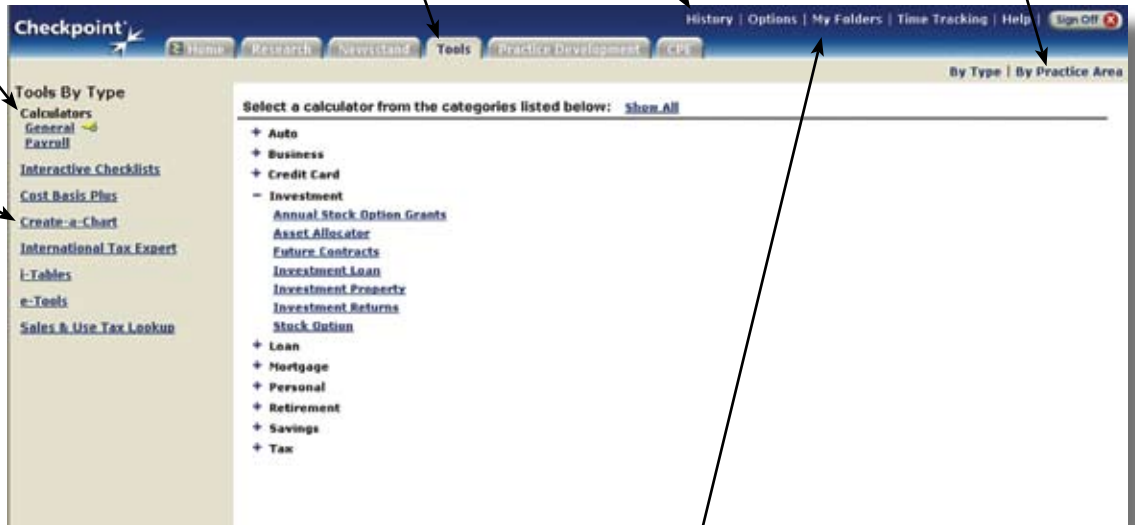
With **Create-a-Chart**, you can quickly create a chart that provides pertinent information in one convenient table, with links to the controlling authority and RIA's detailed explanations.

Create-a-Chart is available for State & Local, International, Payroll, and Financial Reporting.

Click to access productivity tools.

History stores research sessions for the previous two weeks. There is no limit on the number of searches or documents in a session history. Checkpoint automatically logs the session information and the research event, such as running a search or retrieving a document.

View the list of tools by Type or Practice Area.



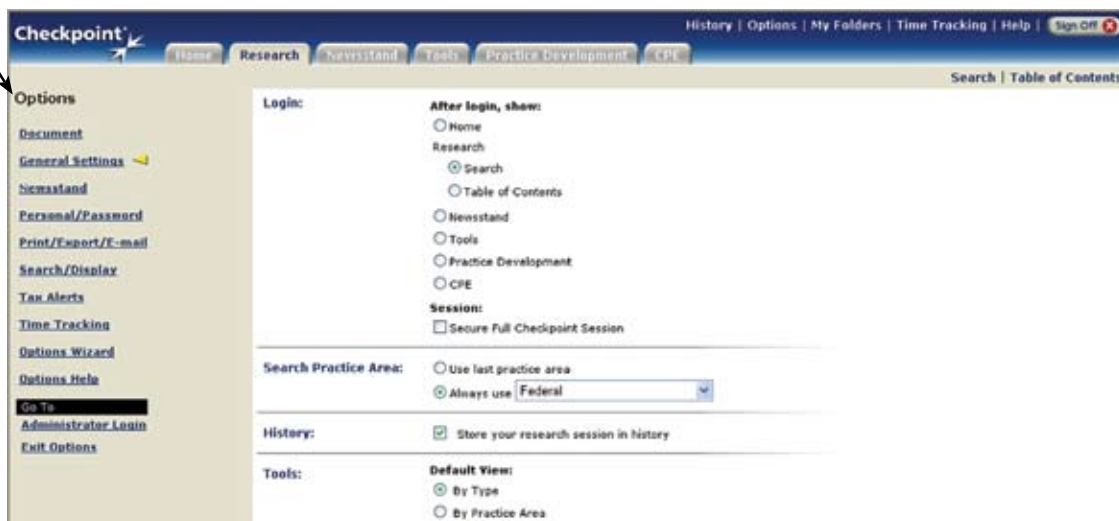
Use **My Folders** to save and retrieve searches and documents at any time. You can save up to 1000 searches or documents in up to 250 folders, thereby organizing your searches and documents for later use. Searches stored in My Folders can also be scheduled to run automatically at a designated interval.

Options

The **Options** screen displays the current or default options so you can set your own preferences for Checkpoint.

Certain options are checked or selected by default. Check a box to select an option, or remove a check to deselect it. You can choose only one option from among a group of circular radio buttons. Click a radio button to select it.

Note: Whenever you change any of these options, click **Save** at the bottom of the screen to save your changes.



Keyword Search Connectors

To locate documents:	Use:	Example:
containing at least one instance of each of my keywords	Space, &, AND	funding deficiency
containing any of my keywords	OR,	funding OR 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*
within n words of another (in any order)	/# (where # equals number)	“disclosure exception” /7 negligence
within the same sentence (20 words) as another (in any order)	/s	“tax year” /s dependent
within the same paragraph (50 words) as another (in any order)	/p	“tax year” /p dependent

Note: Using a hyphen (-) in your search will retrieve related compound words. For example, e-mail retrieves e-mail, e mail, and email. Typing the singular form of the word will retrieve documents containing both the singular and plural forms of the words. Using a # symbol in front of your search term will disable pluralization (e.g., #case). With *reverse pluralization*, if you search for “children,” for example, Checkpoint will also display search results for “child.” And a search of “leaves” will find both “leave” and “leaf.”

Document Navigation Tabs Make Your Research Easier

Like a table of contents, **Contents View** displays a list of documents surrounding the document you are viewing.

Document List displays a list of documents that contain your search terms.

Outline is enabled when you review search results for Tax Code and other large documents. Click this tab to display an outline view of the current document.

Search Tools displays additional search functions.

Links is enabled when you review search results within Tax Code. Click this tab to display a list of associated documents for every top line and side line link type.



Document Options:

To print a document, click the **Print** icon Checkpoint displays a separate print window and the Print dialog box. Click **OK** in the Print dialog box to print the document.

You can **Export** or **E-mail** a complete document.

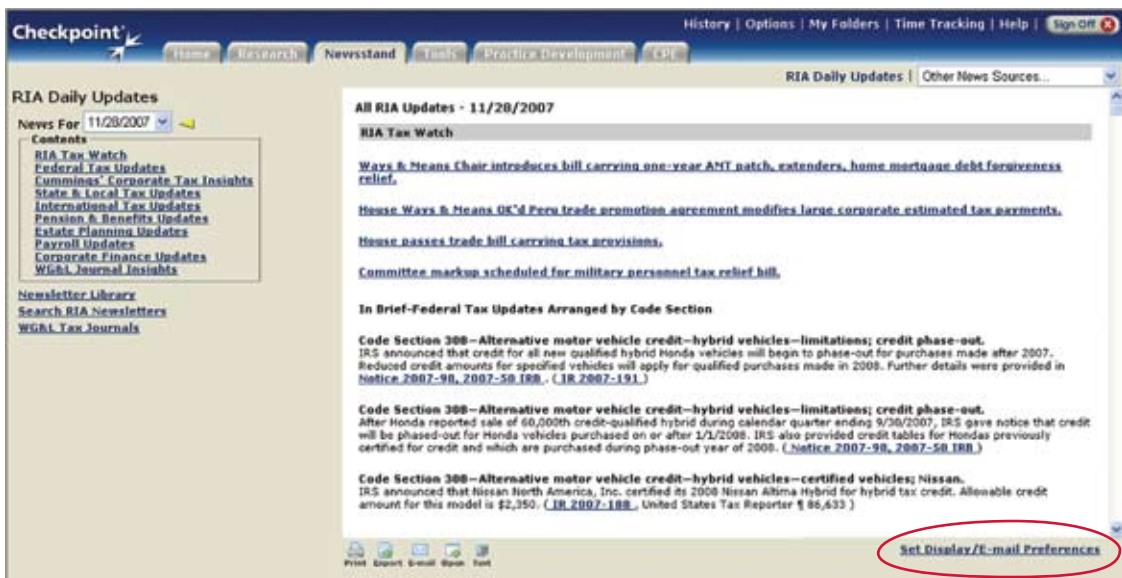
Click the **Save** icon to save the document to *My Folders*.

Click the **Open** icon to open the document in another window (link viewer).

Click the **Text** icon to print, copy, or e-mail selected text.

Up-to-Date Taxation News and Developments

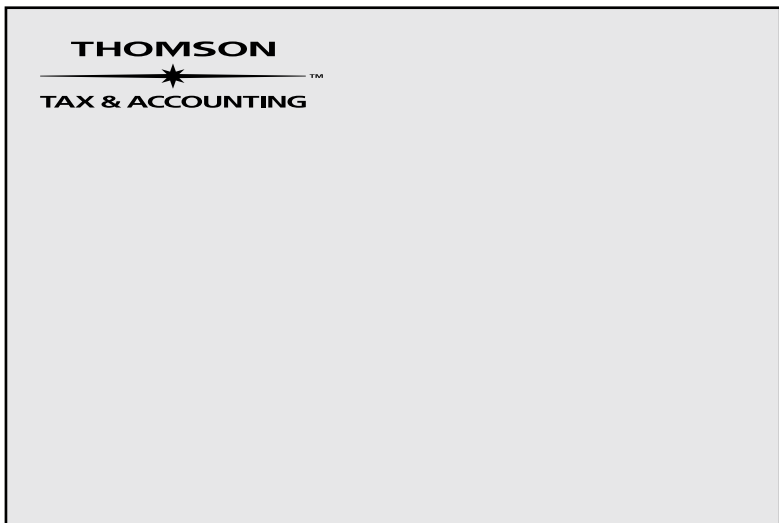
Newsstand provides a comprehensive news service that gives you instant access to the most up-to-date taxation news and developments. It features in-depth articles on tax-related issues, as well as links to informative taxation newsletters, journals, and compliance aids. Materials in *News* are updated regularly.



As part of the news service, you can subscribe to a range of Checkpoint newsletters and have them sent to you by e-mail on a daily or weekly basis.

To have newsletters sent to you by e-mail:

1. Click **Set Display/E-mail Preferences**. (You can also select **News E-mail/Display** from the left frame of the Options screen.)
2. Under RIA Newsletters, select the applicable check boxes to receive highlights of preview articles. You can select two formats for the e-mail newsletters:
 - **Complete Newsletter** - The newsletter is distributed as a complete publication (one per e-mail)
 - **Daily Update** - The newsletter is distributed as a series of daily updates. All daily update newsletters are grouped together in a single e-mail.
3. In the **Display Options** section, select which newsletters you want to appear on the **Newsstand** tab.
4. To confirm your selections, click **Save** at the bottom of the **Options** screen.
5. Click **Personal/Password** in the left frame.
6. In the **Personal** section, enter the e-mail address where you would like to receive the newsletters.
7. Click **Save**.



For support, go to our website:
<http://support.rg.thomson.com>,
or call 1.800.323.8724.