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## PRODUCT & SERVICE GUIDE

# 2012 Review of Thomson Reuters – Checkpoint

Nov. 26, 2012

**Thomson Reuters – Checkpoint**

**800-950-1216**

[checkpoint.thomsonretuers.com](http://checkpoint.thomsonretuers.com)

From the Dec. [2012 review of tax research](#) systems.

**BEST FIT:** Tax and accounting professionals looking for a consistent tax and accounting research solution

### **STRENGTHS:**

- User-specific customization
- Comprehensive search function
- Synchronization between mobile and full versions of the site

### **POTENTIAL LIMITATIONS:**

- Numerous search options may be burdensome for new or infrequent users

Thomson Reuters offers a tax and accounting research solution for tax professionals. Thomson Reuters Checkpoint features a complete research center, complete with customization, comprehensive search capabilities and content from third-party research providers. Recent enhancements and new features include mobile versions

of the Checkpoint website for tablets and smartphones, a new way to search charts, an enhanced Notes feature and customizable print options.

### **Basic System Functions: 4.75 Stars**

Thomson Reuters Checkpoint features a customizable home screen. By default, the home screen is launched when users log in. Through the Options Menu, users can select what is shown upon login: Home, Search, Table of Contents, News, Tools or Learning. Each of these are also accessible via the top menu bar.

When users visit the Checkpoint website from their mobile device, the site will automatically direct them to the mobile version of the site. Users have the option to navigate to the full site and back to the mobile site at any time by clicking on the “Full Site” link or the mobile icon. Features of the mobile site include the ability to search by citation and within the table of contents; access to the WG&L Tax Dictionary, table of contents, news and synchronization of history, folders and flagged documents across all devices. Users can also email documents and save them to folders.

Other features include suggested search terms using the AutoComplete feature, session termination and enhanced Notes. AutoComplete generates suggested search terms as you type your search. With the new session termination feature, users can choose to terminate an existing session if they sign in from another device. Previously, users had to wait for the current session to time out.

The enhanced Notes feature now provides users with a complete list of all document and folder notes. Users can sort the list by date and item title, as well as search notes using the Notes Finder. Notes can be edited and/or deleted at any time.

### **Content: 5 Stars**

Thomson Reuters Checkpoint provides access to a wide range of content, including business English analysis of federal, state and international tax and accounting issues, as well as code and regulations, court cases, tax tables and rates, tax planning libraries, tax calculators and the latest news. Users also have access to a number of newsletters that can be viewed online or sent through email. Delivery options and frequency can be set by each user.

The new Charts tab and “Find A Chart” function make it easier for users to search for charts and create charts for topics they are researching. With the mobile versions of

Checkpoint, users now have access to all of their files, folders and history from all mobile devices and the full site.

### **Customization: 5 Stars**

Each user can customize Thomson Reuters Checkpoint specific to their individual login. The homepage allows users to rearrange the way content appears. Users can also choose what is shown when they log in – Home, Search, Table of Contents, News, Tools or Learning – and how search results are displayed.

Newly added is the capability to choose how a document will display when it is printed. Options include font size, font type and displaying Notes. Users can also customize their on-screen display options for the print display mode.

### **Integration/Import/Export: 4.75 Stars**

Thomson Reuters Checkpoint integrates with other Thomson Reuters products and several export options. Documents can be exported or emailed in PDF, Word, HTML and RTF formats, while charts may be exported in the same formats, as well as Excel and CSV formats. Users can also export their session history.

### **Help & Support: 5 Stars**

Thomson Reuters Checkpoint offers links to online support, a user guide and training from the solution's Help menu. Email and phone support are available as well. The Help Guide located within the program follows the traditional format, with links to topics, an index and search function.

In addition, a blue and white question mark appears beside many features, displaying descriptions and Help topics relevant to the specific feature. Updates of primary source and editorial content occur nightly.

### **Summary & Pricing**

Thomson Reuters Checkpoint is a single platform for tax and accounting research that features content from a variety of primary and third party providers. Its customizable interface allows users to choose the layout of their home page and other features. Subscriptions are based on the number of users and subscribed content and start below \$1,000.

## **2012 Overall Rating: 5 Stars**

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