

THOMSON REUTERS

CHECKPOINT®



# ANNOTATION GUIDE

Checkpoint enables you to add annotations within the documents of your subscribed products. You can create the following annotations to personalise your research experience:

1. Document Note – add a general note that applies to the overall document
2. Inline Note – add a note to a selected section of a document
3. Highlight – highlight a section of text within a document
4. Snippet – save a section of text to My Folders

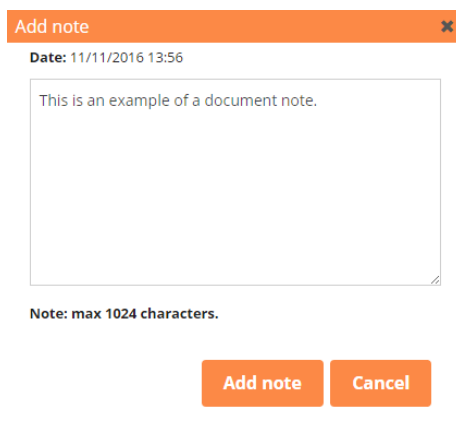
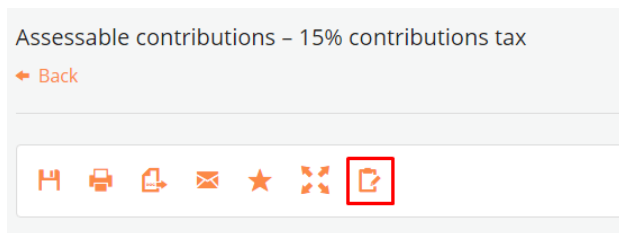
NOTE: You can save Annotated documents to My Folders so you can easily refer back to them. Please refer to the My Folders Quick Guide for more information.

## 1. DOCUMENT NOTE

You can create a general note that applies to the entire document. Once you create a document note it will appear at the top of the document. NOTE: you can add a maximum of 10 notes per document.

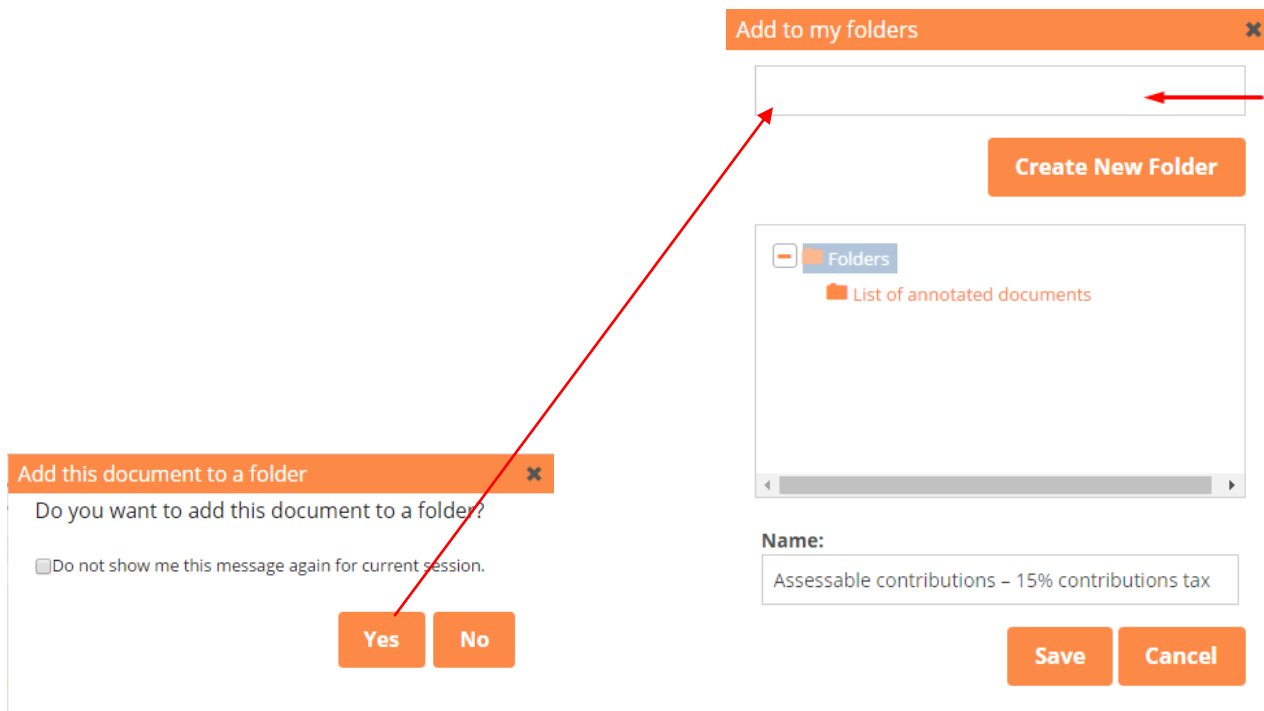
### Add a Document Note

From the document display page, click on the **Add Note** icon located on the document tool bar.

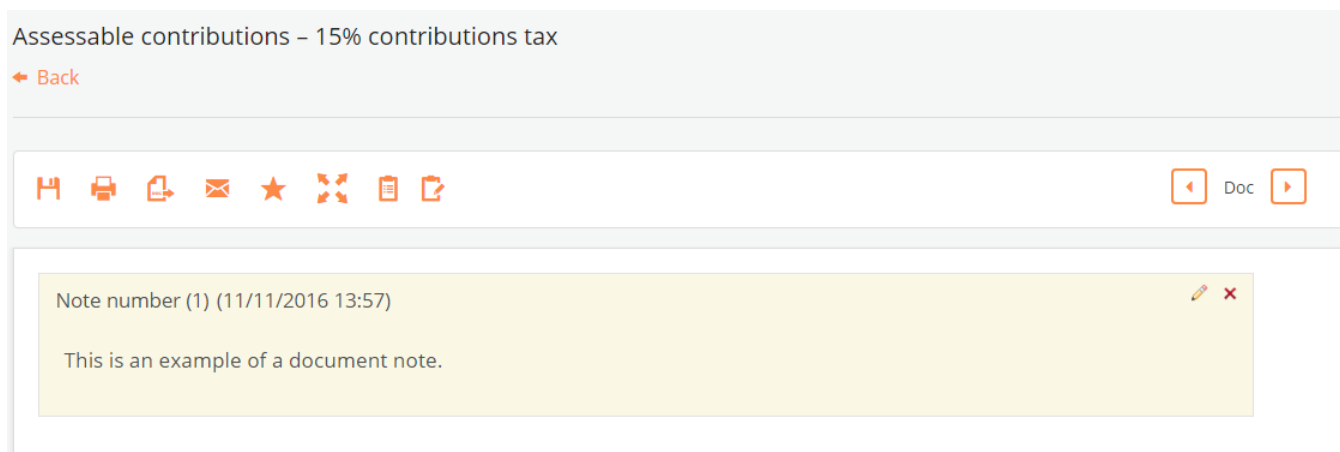


In the **Add Note** window, enter your text. Click the **Add note** button to save.

When adding your first note, you will be prompted to “Add this document to a folder”. You can choose to save the note to a folder at this time. At this stage you can create a **New Folder**.



The note will appear at the top of the document as seen below. To add further document notes, repeat Add Note steps.



**Show/Hide Note(s)**

You can view your document with or without your notes being visible.

1. By default, any notes added to a document will be visible
2. To hide the note(s), click on the Note icon located at the top of the document in the document Tool Bar
3. This will hide all notes in the document
4. To show the note(s), click on the same Note icon

**Edit a note**

1. To edit a note, click on the Pencil icon against the note
2. Edit your note in the Add Note window
3. Click the **Confirm** button to save your changes

**Delete a note**

1. To delete a note, click on the X icon against the note
2. Click on the **Delete** button when prompted 'Are you sure you want to delete the note?'
3. The note will be deleted
4. Alternatively, click **Cancel** to exit

**Printing/Export/Email notes**

You can print/export or email your document with or without your notes being visible.



1. To print click on the print icon located at the top of the document in the document Tool Bar
2. The Print Options window will pop up
3. Tick "Include Document Annotations" from the Output Options list
4. Click **OK**. Your document will print with the included notes

**2. INLINE NOTE**

An Inline note is associated with selected text in a document and for easier reference can be found directly next to the selected text in the right hand side margin.

**Add an Inline Note**

To add an **Inline Note**, select the text by left mouse click and run your cursor over the text to be selected. Release the mouse and choose the **Add Note** option from the pop up window.

contributions (see [41 160]) flow into a superannuation fund's taxable income means that assessable contributions tax at the fund's applicable tax rate (ie 15% for complying funds and 47% for non-complying funds). Since assessable contributions form part of the overall taxable income of the fund, the effective tax rate is reduced by deductions, tax offsets and/or franking credits. [Add Highlight](#) income (see [41 450]).

[Add Note](#)

The low income superannuation contribution (LISC) essentially offsets the 15% contributions tax on contributions made for individuals with an adjusted taxable income up to \$37,000. [Add Snippet](#)



In the **Add Note** window, enter your text. When adding your first note, you will be prompted "**Add this document to a folder**". You can choose to save the note to a folder at this time.

Add this document to a folder
✕

Do you want to add this document to a folder?

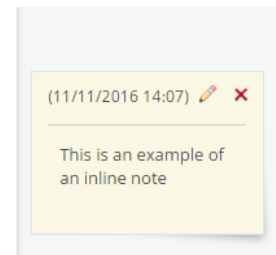
Do not show me this message again for current session.

Yes
No

Type in your note text. Click the **Add Note** button to save. The text will be highlighted and the note will appear in the right hand margin of the document. To add further notes, click on any highlighted section of text. Select Add Note from the popup menu list and repeat Add Note steps.

means that assessable contributions are effectively subject to a contributions tax at the fund's applicable tax rate (ie 15% for complying funds and 47% for non-complying funds): see [41 150]. Of course, since assessable contributions form part of the overall taxable income of the fund, the effective tax rate may be less if the fund is entitled to deductions, tax offsets and/or franking credits on dividend income (see [41 450]).

The low income superannuation contribution (see [39 330]) essentially offsets the 15% contributions tax on superannuation guarantee contributions made for individuals with an adjusted taxable income up to



**Tip:** You can move notes within a document by hovering over the top of note above the line and dragging the note to the new position. This is temporary and can only be retained for that session.



### Show/Hide Note(s)

You can view your document with or without your notes being visible.

1. By default, any notes added to a document will be visible
2. To hide an individual note, click on the Note icon at the start of the selected text
3. This will hide the note
4. To show the note(s), click on the same Note icon



### Edit a note

1. To edit a note, click on the Pencil icon against the note
2. Edit your note in the Add Note window
3. Click the **Confirm** button to save your changes

**Delete a note**

1. To delete a note, click on the X icon against the note
2. Click on the **Delete** button when prompted 'Are you sure you want to delete the note?'
3. The note will be deleted
4. Alternatively, click **Cancel** to exit

**Managing multiple notes for the same text selection**

You can add multiple notes to a selected section of text. To add further notes:

1. Click on any highlighted section of the text and select **Add Note**
2. Enter your text into the Add Note window
3. Click **Add Note**. The new note will appear directly below the first note
4. To bulk delete all notes associated to a section of text, click on the highlighted section and choose "Delete Highlight"

**Printing/Export/Email notes**

You can print/export or email your document with or without your notes being visible.



4. To print click on the print icon located at the top of the document in the document Tool Bar
5. The Print Options window will pop up
6. Tick "Include Document Annotations" from the Output Options list
5. Click **OK**. Your document will print with the included notes

**3. HIGHLIGHT WITHIN A DOCUMENT**

You can apply a Highlight to selected text within a document. Highlighting makes it easy to visually single out specific text for use at a later date, prompt further research and reduce the risk of missing important information.

**Add a highlight**

To add a **Highlight**, left mouse click and run your mouse over the selected the text. Release the mouse and choose the **Highlight** option from the popup menu list.

The low income superannuation contribution (see [39 330]),  
superannuation guarantee contributions **Add Highlight** ividual  
\$37,000. **Add Note**

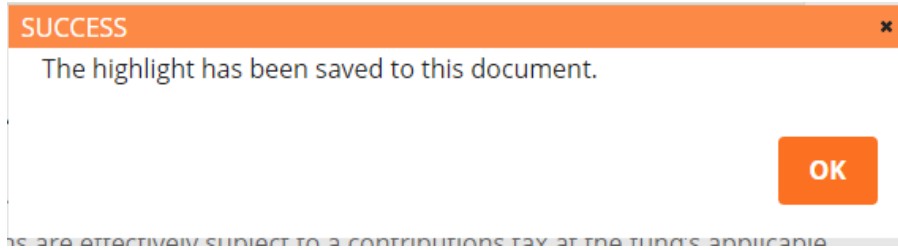
**Add Snippet**

Taxpayers above the "high income threshold" of \$200,000 a

The "Success" confirmation box will appear. Click the **OK** button to close. The text will be highlighted.

**Tip:** You can add a note to this highlight by clicking on the highlighted section and selecting Add Note from the popup menu list.





Delete Highlight

Add Note

#### Delete a highlight

1. Click the highlighted text section
2. Choose 'Delete Highlight' from the options list
3. Click the **Delete** button when prompted "Are you sure you want to remove the highlight?"
4. The highlight will be deleted from this section of text
5. Alternatively, click **Cancel** to exit

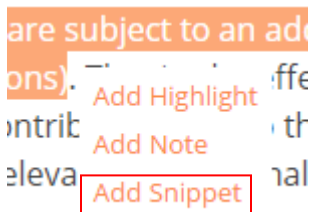
**Note:** When deleting highlights, any associated notes will also be deleted

## 4. SNIPPETS

Checkpoint enables you to save a section of text within a document as a **Snippet** to your **Folders** for easier identification of important information or reference. A snippet may be a quote, ruling, determination and/or relevant text you may wish to regularly reference and quickly link to directly.

### Add a Snippet

Select the text you wish to save as a snippet by left mouse clicking and running your mouse over the selected text. Release the mouse and choose the **Snippet** option from the popup menu list.



In the **Add Snippet to Folder** window, select the folder to save the snippet to or create a new folder. Edit the name of the snippet (optional). Click on the **Save** button and **OK** to confirm. The snippet is now saved within the selected folder in Folders.

**Note:** A maximum of 512 characters can be selected to save as a Snippet.

### View and Manage Snippets

To view your Snippet, go to Folders, located in the top orange tool bar, and select the folder location. You will be able to:

- View Snippet details
- Delete Snippet

Snippets are saved within Folders, please refer to the Folders Quick Guide to view and manage items.