THOMSON REUTERS

CHECKPOINT USER ADMINISTRATION QUICK REFERENCE

Login to Checkpoint User Administration

1. Launch your browser and enter the Checkpoint User Administration URL in the browser address bar: https://cpadmin.thomsonreuters.com
2. Enter your **User Name** and **Password** and then click **Login**.

Checkpoint User Administration Home

The Checkpoint User Administration Home page is the central hub for all of the different functionality available to Site Administrators.

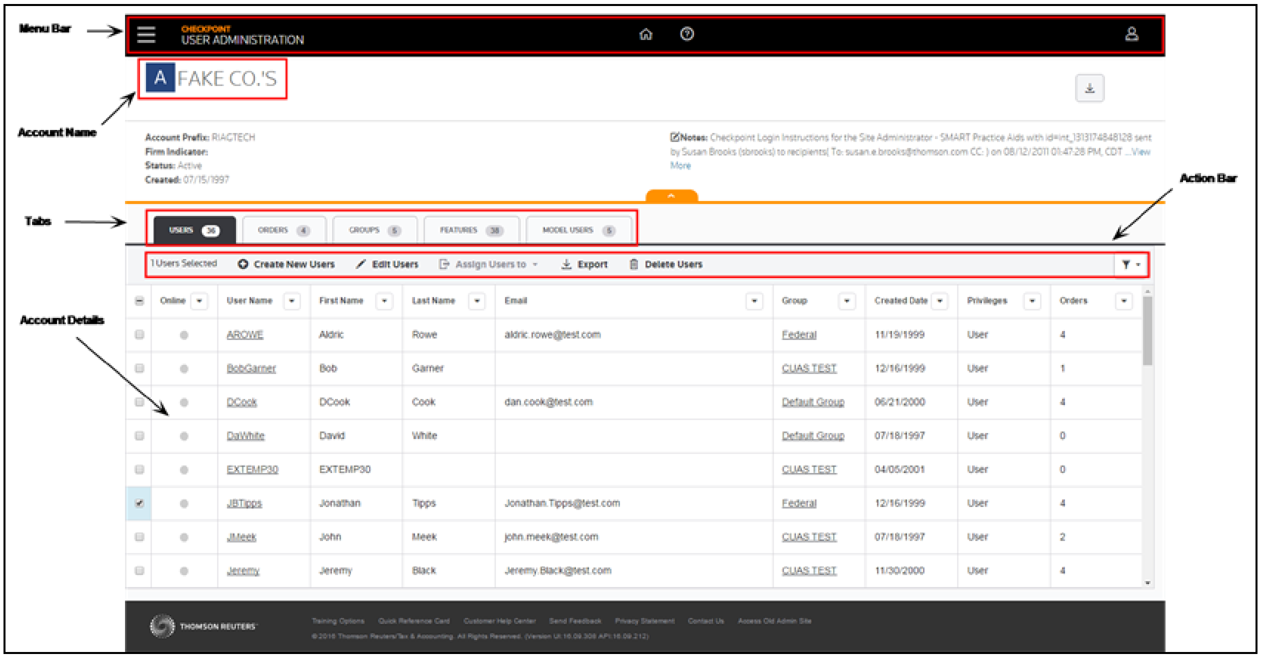
Click the **Home** icon from the menu bar at the top. It provides a summary of your Account information in the **My Account** section. The information provided includes:

- **Firm Name**
- **Unit Number**
- **Account Prefix**
- **Firm Indicator**
- **Status of Account**
- **Created date of Account**

The core User Administration features are categorized into 5 different sections: **Users**, **Orders**, **Groups**, **Features** and **Model Users**.

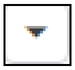
For support, go to http://support.checkpoint.thomsonreuters.com, or call 800.431.9025.

Screen Orientation



Know Your Icons

Icon	Function
	Use the **Navigate to Quick Links** icon to access Checkpoint.
	Click the **Home** icon to navigate to the main screen.
	Click the **Help** icon to refer to the help system.
	To view your profile, and to Sign Out, click on the **My Account** icon.
	This **Export** icon is present on the upper right corner of the Home screen, click the icon to download a Users to Orders Report in a spreadsheet format.
	This icon is present in the Action Bar, click the **Export** icon to download information in the form of an excel spreadsheet.
	To see an expanded or collapsed version of information of your account, click the **Toggle** icon.

	To get a more accurate result, use the **Filter** that is present in each column, under each action item.
	This indicates that a column has been filtered. To see the criteria and the type of criteria used, click the **Advanced Filter** icon.

Tabs & Action Bar

The Action Bar under each Tab has a few action items available.

Tab	Actions
USERS	Create New Users, Edit Users, Assign Users, Export, Delete Users.
ORDERS	Assign Orders, Export.
GROUPS	Create New Group, Edit Group Details, Assign Groups to Orders, Export, Delete Group.
FEATURES	Enable, Disable, Export.
MODEL USERS	Assign Model Users to Account, Assign Model Users to Group, Remove Model Users, Export

Screen Icons

Every screen has a unique icon so that it is easy for you to identify the screen that you are operating on.

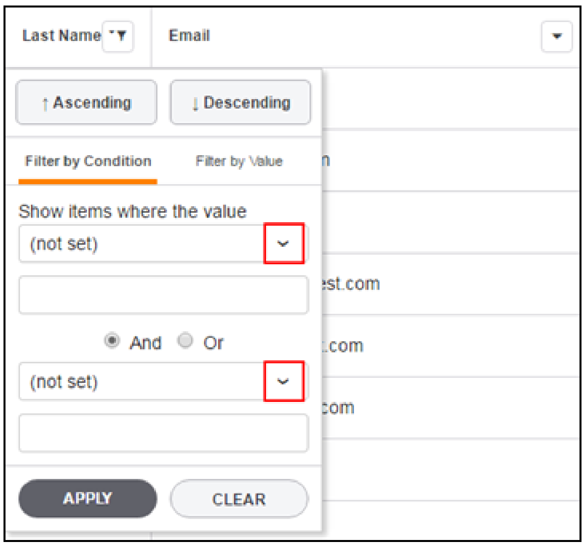
Icon	Screen
A	Account Detail Screen
U	Users Detail Screen
Or	Orders Detail Screen
G	Groups Detail Screen

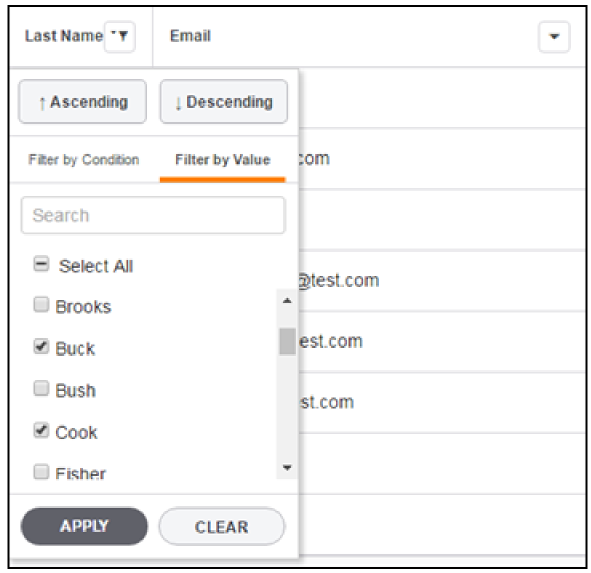
Filters

To get a refined search, click the **Filter** drop-down and make a selection.

The **Advance Filter** drop-down then appears on the column where the selection has been made. You can choose to display your information in either **Ascending** or **Descending** order.

You also have the option to either **Filter by Condition** i.e., choosing filter conditions available in the drop-down, or **Filter by Value** i.e., by making a selection of items according to your requirement.

<table>
<tr><th>Filter By Condition</th><th>Filter By Value</th></tr>
<tr><td>


</td><td>


</td></tr>
</table>

Create Users

The Create Users screen guides you through the process of creating and adding users to your account. The process is divided into 8 steps (which you can follow from the timeline on the top of the Create Users screen):

Access the Create Users Screen

Click the **Create Users** option from the **Action Bar** under the **User** tab. The **Create Users** screen appears. Follow the steps in the time line at the top of the screen to complete the process.

1. **Select Method**

   Select the method you want to use to create the user name(s). There are 2 possible options. Select one:

   - **Generate from Email Addresses** - Enter a list of e-mail addresses in the provided text box and the system will attempt to generate user names and the user's full name from the provided e-mail addresses.
   - **Generate User Names** - This will create a random set of user names. You can select the number of users you want to generate, along with the prefix to start the user name with and select an option of either using a random method or by using a sequential method with a number of your choice.

   Click **Next** when complete to move to the next step.

2. **Edit Users Information**

   For each of the user names you are creating, enter the user information and details. This includes the User Name, First Name, Middle Name, Last Name, E-mail Address, Privileges, Location and Cost Center.

   Click **Next** when complete to move to the next step.

3. **Model User**

   Select the method you want to use for a model user. You could choose either one of the options:

   - **Checkpoint Preferences** - You can copy the Checkpoint preferences from a user or you can choose to retain the default Checkpoint preferences.
   - **Orders & Group** - You can either copy the orders and group from another user or let a default orders and group remain.

   Click **Next** when you are ready to move to the next step.

Note: You can choose not to select a model user. Click the **Next** to proceed to the next step.

4. **Assign Groups**

   Select the group for each of the users you are creating.

   When you have added all the new users to their groups, select **Next** to move to the next screen.

5. **Select Orders**

   Select the orders for assignment by using the check boxes.

   Click **Next** when you are ready to move to the next step.

6. **Assign Orders**

   Assign your new user(s) to orders. Select the check box for the order you want to assign them to. Each order header will display the number of remaining users you can assign to it. If you assign an order over the amount of remaining users, the heading will display with a red background and you will receive a message when you attempt to move to the next step. You must correct these assignments before continuing.

   Click **Next** when you are ready to move to the next step.

7. **Confirm**

   Review your new user information before creating them.

   If the information is correct, click **Confirm**. Otherwise step back to change the information using the timeline at the top of the page. Click the step name to jump to that screen.

8. **Notify**

   If you want to notify your new users with an e-mail containing their user names, select the **Send E-Mail?** check box next to the user information.

Your new users have been created!

Click **Home** to return to the Checkpoint User Administration Home screen.

Edit Users

Use the **Edit Users** screen to modify your users' information.

Click **Edit Users** from the Action Bar that is available under the **Users** tab.

Each of the selected users will be displayed with their details on the **Edit Users** screen. Double click in a cell to edit the information as needed and click **Done**.

The changes have now been saved.

Assign Users to Orders

Use the **Assign Users to Orders** screen to add existing users to order(s).

Access the Assign Users to Orders screen

Click the **Assign Users to Orders** link from either **Users** or **Orders** sections on the Home page. Follow the steps in the timeline at the top of the screen to complete the process.

1. **Select Users**

   A list of users within your account will display. Use this screen to filter the list to a smaller subset that is more manageable. You may filter, sort, and re-categorize the user list. Select the check box(es) next to the users you want to assign orders to.

   Click **Next** to proceed to the next step.

2. **Select Orders**

   If you still have a large subset of users selected, you may be prompted to also create a smaller set of orders to work with on the **Assign Orders** screen. Select the check box(es) next to the orders that you want to work with on the **Assign Orders** screen.

   Click **Next** to proceed to the next step.

3. **Assign Orders**

   Assign orders to your users. If you filtered the list of users and orders in the previous two steps, you will only see the grid containing those users and orders. If the selected Users-Orders combination is more than the predefined threshold value, you will see a table with only a header-row of selected Orders and a column of selected Users allowing only bulk-assignments.

   Select the check box for the order you want to assign. Each order header will display the number of remaining users you can assign to it. If you assign an order over the amount of remaining users, the heading will display with a red background and you will receive a message when you attempt to move to the next step. You must correct these assignments before continuing.

   You can choose between Product Code, Product Name and Order Number to display as the product heading.

   Similarly, choose between Full Name, User Name and Email address to display as user heading.

   Click **Done** to assign the users to orders.

Your users have now been assigned to the designated orders.

Click **Home** to return to the Checkpoint User Administration Home screen.

Assign Users to Groups

Use the **Assign Users to Groups** screen to assign users to a group.

Select Users

A list of users within your account will display. Use this screen to filter the list to a smaller subset that is more manageable. You may filter, sort, and re-categorize the user list. Select the check box(es) next to the users you want to assign to a group.

Click the **Assign Users to Groups** option from Action Bar that is under the **Users** tab. Follow the steps in the timeline at the top of the screen to complete the process.

Assign Groups

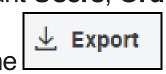
Select the group for each of the users you want to assign. You may assign these individually on each user's row or select the column header to assign the same group to all of the users listed.

Click **Done** to assign the users to the designated groups.

Your users have now been assigned to their groups.

Click **Home** to return to the Checkpoint User Administration Home screen.

Export

You have the option of exporting a list of account **Users**, **Orders**, **Groups**, **Features** and **Model Users** in the form of an excel spreadsheet, by clicking on the 

icon.

Delete Users

Use the **Delete Users** screen to delete a user or multiple users from an Account.

Select Users

Select the users you want to delete by selecting check box(es) next to the User Name. You may filter, sort, and re-categorize the user list.

Click the **Delete Users** option from the Action Bar under the **Users** tab. .

Confirm

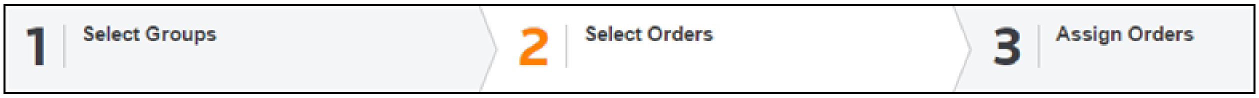
If the information is correct, click **Delete** to delete the listed user(s). Otherwise click **Cancel** to return to the **Select Users** screen.

Warning: Once a user has been deleted, there is no way to undo the process.

Click **Home** to return to the Checkpoint User Administration Home screen.

Assign Orders to Groups

The **Assign Orders to Groups** screen guides you through the process of assigning orders to groups. The process is divided into 3 steps (which you can follow from the timeline on the top of the **Assign Orders to Groups** screen):



Use the screen to assign orders to a selected group. You can also assign multiple orders (products) to multiple groups

1. **Select Groups**

   Select a group from your account by selecting the check boxes next to the Group Name. The number of users assigned to each group is displayed in the **Assigned Users** column. You may filter, sort, and re-categorize the user list.

   Click **Assign Orders to Groups** from the Action Bar under the **Orders** tab.

   Follow the steps in the timeline at the top of the screen to complete the process.

2. **Select Orders**

   Select the check box(es) next to the orders that you want to work with on the **Assign Orders** screen. You can filter the orders as per your requirement.

   Click **Next** to proceed to the next step.

3. **Assign Orders**

   Assign orders to your groups. You will only see the grid containing the groups and the orders selected in the previous two steps. The Group Names appear in the first column, and individual products appear in the columns across the screen.

   Select the check box for each order you want to assign. Each order header will display the number of remaining users you can assign to it. If you assign an order over the amount of remaining users, the heading will display with a red background and you will receive a message when you attempt to move to the next step. You must correct these assignments before continuing. If you are assigning orders to multiple groups, select the order assignment check box under the product name to assign it to each group individually or the Order category check box (in the column header) to assign to all groups in the displayed list.

   Click **Next** to the final step.

   You can choose to display the product heading to either be a Product Code, Product Name or Order Number.

   Click **Done** to assign orders.

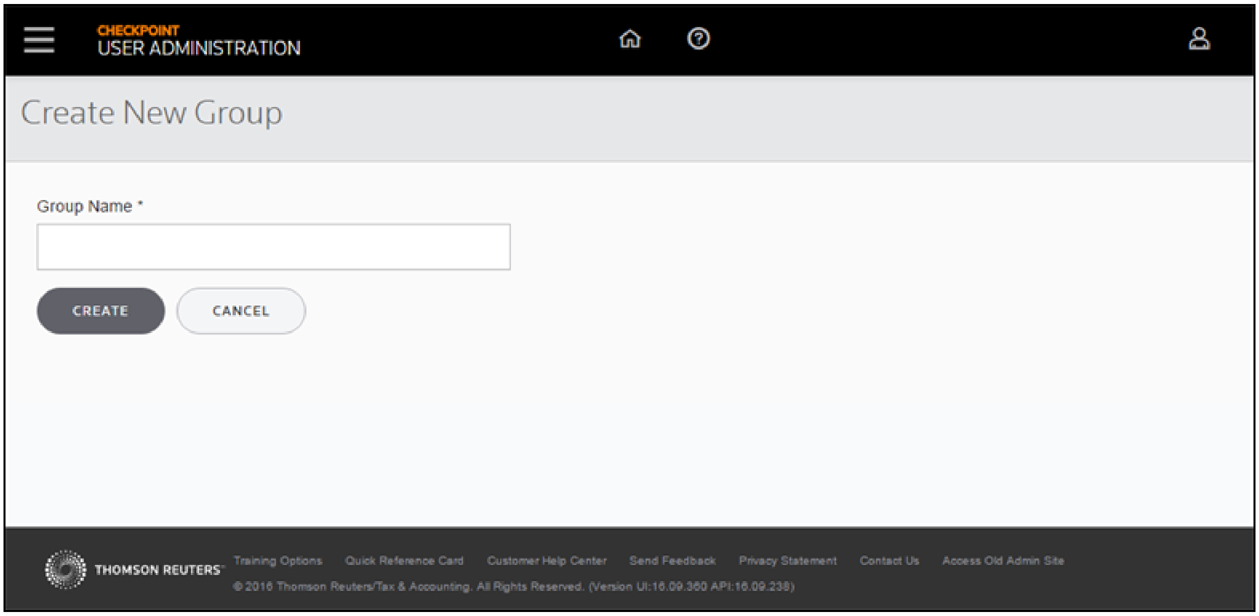
Your orders have now been assigned to the designated groups.

Click **Home** to return to the Checkpoint User Administration Home screen.

Create New Group

The **Create New Group** screen guides you through the process of creating a new group and assigning users to it.

Click the **Create New Group** option from the Action Bar, from the **Groups** tab.



Create Group

Enter the name for your new group in the **Group Name** field and click the **Create** button to proceed to the next step.

Add Users to Group

Once your group has been created, click on the **Add Users to Group** button. A list of users within your account will display. Use this screen to filter the list to a smaller subset that is more manageable. You may filter, sort, and re-categorize the user list. Select the check box(es) next to the users you want to assign to the group.

Click **Next** to proceed to the next step.

Assign Groups

Select the group for each of the users you want to assign. You may assign these individually on each user's row or select the column header to assign the same group to all of the users listed.

You may change the data you want to display for the user column (far left) to list the user(s) by user name, email address or full name. Hovering over the a user's information displays a pop-up with all of their details.

Click **Done** to assign the users to the designated group.

The users have now been assigned to the selected group

Click **Home** to return to the Checkpoint User Administration Home screen.

Edit Group Details

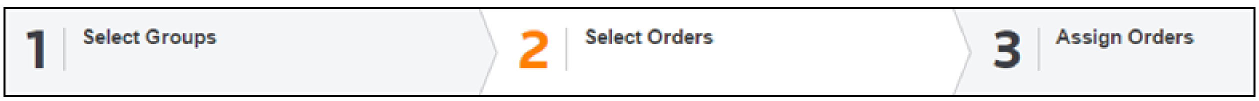
The **Edit Group Details** screen guides you through the process of editing existing groups.

Select the group for which the group details need to be edited and click on the **Edit Group Details** option.

You may choose to **update** or **reset** the group name.

Assign Groups To Orders

The **Assign Groups To Orders** screen guides you through a three step process of assigning groups to orders.



1. **Select Groups**

   Select a group that you wish to assign an order.

2. **Select Orders**

   Select the orders by check marking the boxes that need to assigned by the groups.

   Click **Next**.

3. **Assign Orders**

   Similarly, use the check boxes to change order assignments.

   Click **Done**.

   To view the changes made to Orders, click on the **Export** option.

Delete Group

To remove a particular group from your records, select the group and click the **Delete Group** option that is available on the Action Bar.

Once you click delete, you will be asked to reassign the users to an existing group.

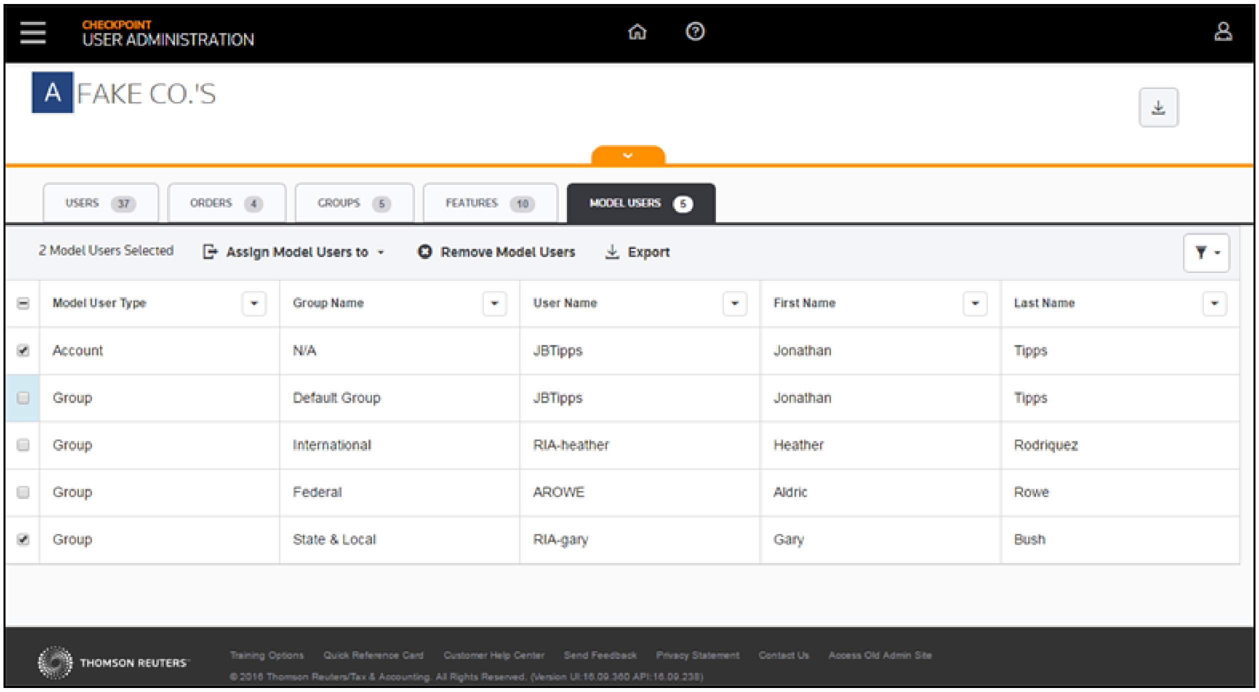
Click **Done**.

The group now has been deleted.

Click **Home** to return to the Checkpoint User Administration Home screen.

Assign Model Users for Account

Use the **Model User for Account** feature to assign Checkpoint look-and-feel preferences of an existing 'model' user to a new user.



Click on the **Assign Model Users to Account** option from the Action Bar, under the **Model Users** tab.

1. A User list will appear displaying **User Name**, **First name**,**Last Name**, **E-Mail Address**, **Group**, **Created Date**, **Privileges**, and **Orders**.

2. Click the radio buttons to assign the user as the model user for the account. To assign a model user for the account, select the radio button next to the User Name

3. Click **Done**.

When you return to the Home screen, the assigned model user name should be visible on the My Account Screen under the **Model Users** tab.

Assign Model Users to Groups

Use the **Assign Model Users to Groups** feature to assign Checkpoint look-and-feel preferences of an existing 'model' user to a new user within the same group.

Click **Assign Model Users to Groups** from the Action Bar, under the **Model Users** tab. Follow the steps in the timeline at the top of the screen to complete the process.

Select Users

A list of users within your account will display. Use this screen to filter the list to a smaller subset that is more manageable. You may filter, sort, and re-categorize the user list. Select the check box(es) next to the user(s) you want to consider for assigning as model users to groups.

Click **Next** to proceed to the next step.

Assign Groups

A list of groups within your account will display. Use this screen to filter the list to a smaller subset that is more manageable. You may filter, sort, and re-categorize the user list. Select the radio button next to the groups you want to assign model users to.

You have the option of displaying the user heading either as Full name, User name or Email address.

Click **Done** to proceed to the next step.

Model users have now been assigned to the groups.

Click **Home** to return to the Checkpoint User Administration Home screen.

Remove Model Users

To remove model user access for a user, select the particular row and click **Remove Model User**, you will see a warning message, click **Remove** to restrain model user access for a user.