

# INTRODUCTION

The DATASMITH Payroll System does all the commonly required payroll data entry, updating, calculating, and report printing functions. This program has been field proven in general business environments servicing from one to over 60 payrolls containing from four to over 30,000 employees each. The system uses logical, straightforward processing sequences with preview-and-redo at each stage. It prompts the user for each information item so that an operator will quickly learn to use the system to efficiently do all payroll functions.

The system calculates pay for hourly, salaried, commission, and mixed-method employees, independent contractors, and computes federal, state, local, FICA, and Medicare taxes. It provides automatic paycheck and tax liability adjustments for Earned Income Credit for both "Single" and "Spouse Also Eligible" cases. Other taxes such as School District taxes, SDI, and SUI contributions are also calculated for any one or all 50 States. The user can "customize" his payroll to include provisions for Vacation time, Loans and Loan repayment, Imputed pay (Vehicle Use, Allocated Tips, Excess Group Term Life Insurance), 401(K) or 403(B) or other Pension Plan contributions, multiple-component S-125 Cafeteria Plans, and other situations using the powerful built-in, User-Defined Tax Treatment and Handling features of the system.

System output includes over 23 Standard Reports, including the Employee Master List, the periodic Payroll Report, Paychecks, Quarterly and other reports for any period; Year-end reports, Employee Labels (pin feed and laser versions with Postnet codes), and utility reports.

The system uses a structured, modular design so that system functions can be altered and added as required. This design assures that the system will not become obsolete as company and government requirements change. The original structure is still intact after over eighteen years of field use: attesting to the viability of this concept.

Brief power interruptions, static electricity, and other common office hazards can "crash" your computer. DATASMITH programs reduce the effects of these hazards on your business operations by keeping data constantly updated on disk, preserving source data, and automatically making periodic backups. An elaborate multi-level error handling & reporting system makes most problems easily recoverable by the operator.

Exceptions and human errors are "Normal" with any people-intensive process such as payroll. DATASMITH Payroll incorporates "Preview and Re-Do," and "Warn, but don't roadblock" operating philosophies throughout to handle exceptions as easily as possible.

Familiarity comes with practice, so it we recommend that you read the manual completely and then "play" with the system (sample data is provided for this purpose) until you are familiar with its functions. You will then have the confidence to use the system for your own payroll needs. Once you are familiar with its operation, you will

find that the menu descriptions and built-in helpful reminders are adequate to lead you through every program and process.

## EQUIPMENT AND SOFTWARE REQUIREMENTS

**COMPUTER** "IBM compatible" or an "industry standard" 386, 486, Pentium, 686, or compatible microcomputer.

**OPERATING SYSTEM** **DOS:** PCDOS/MSDOS 5.0+, DR-DOS 6.0+, or Novell DOS 7+.  
**OS/2:** OS/2 version 2.1+ or "WARP" (version 3+)  
**WINDOWS:** Windows 3.1x, Windows 95/98/NT/2000/XP  
**LINUX:** Red Hat 6.x+ or later

...or an operating environment compatible with one of the above.

**MEMORY** At least 420KB or 430,080 bytes of available "Conventional Memory" is required: 520KB is recommended. The relevant "available memory" is labeled "Largest Executable Program" in the display produced by the MEM command and other utilities. Optional features may increase this requirement.

**DISK STORAGE** At least one 3.5" or 5.25" diskette drive plus a hard disk is required. Fully-implemented Custom Payroll requires approximately 10 MB for program and system file storage plus 256 KB per hundred employees and 15 KB per pay period for each pay period required "on-line" (minimum two periods). Custom Payroll's W-2 programs work with any DOS-supported diskette, but SSA regulations require that W-2 diskettes be submitted on DSDD or DSHD 5.25" or 3.5" media at this writing.

DATASMITH Payroll is normally distributed on CDROM or 3.5" DSHD (1.4 MB) diskettes. Upon special request, DATASMITH Payroll can also be shipped on 5.25" DSHD (1.2MB) diskettes, or on 100 MB Iomega Zip (tm) disks.

Approximate disk space required for payroll data:

	<u>10 employees</u>	<u>100 employees</u>	<u>1000 employees</u>
Minimum (2 periods)	82 KB	543 KB	5.2 MB
Maximum, Monthly	532 KB	3.5 MB	33.5 MB
Maximum, Semimonthly	1.0 MB	6.8 MB	64.4 MB
Maximum, Biweekly	1.1 MB	7.3 MB	69.5 MB
Maximum, Weekly	2.2 MB	14.4 MB	136.5 MB

**NOTE: Some Payroll options and certain Payroll versions require expanded Company and/or Employee file space! If disk space is tight, check with LPI Information Systems for an accurate determination of your file space requirements.**

**DISPLAY**

Custom Payroll automatically adapts to any IBM-compatible standard display, monochrome or color, with 80 columns and 24 lines capacity. The operator can change Payroll's default choice of display colors.

**PRINTER**

The system requires at least one, and supports up to four printers, each of which may be any of the following types:

**DOT MATRIX:**

An "Epson compatible" printer with at least 80 column capacity (at 10 Characters/inch) and a tractor feed mechanism. Dot matrix printers intended for W-2 form production should be rated for at least four copies. A bottom feed or a "straight through" paper path is recommended. The tractors should be adjustable to accommodate 8.5"-9.5" wide forms.

**LASER:**

Hewlett-Packard Laserjet Series II, III, IV, V, VI, or later 100% compatibles supporting PCL 3, PCL 4, or PCL 5. DATASMITH Payroll handles either local or network printers, including PJJ printers.

**INK JET:**

Hewlett-Packard Deskjet or 100% compatible supporting PCL 3 or later, including network configurations using PJJ printers. The paper positioning mechanism on some inkjet models may not be accurate enough for certain densely-printed standard forms, such as 4-up W-2's and 1099's. "Windows only" printer models will not print standard government forms correctly.

Both Laser and dot matrix printers should be able to print at 10 characters per inch pitch and six lines per inch vertical spacing. Custom Payroll supports compressed printing of wide reports, and landscape orientation. When using standard 11" long forms, these settings yield 66 lines per page on dot matrix printer, 60 lines per page on a laser or ink jet printer using portrait orientation, or 45 lines per page on a laser or ink jet printer using landscape orientation.

**MOUSE**

A Microsoft Mouse, "PC-Mouse," or a compatible mouse may be used, but is not required, with Version 9.5+. All selections can be made using the keyboard.

## INSTALLATION

The program CDROM or diskette set delivered with your system is your master and should never be used for actual processing. Be sure to file the originals in a safe place. Unless otherwise noted in the accompanying paperwork, each new CDROM or diskette set contains all the programs necessary to update your existing installation or to create a new installation.

# QUICK-START INSTALLATION INSTRUCTIONS

## ● WINDOWS:

From the Desktop, select File (or START in Win 95/98/NT/00/XP)

On the File menu, select Run.

In the Run window, Enter the Command line: A : SETUP

*NOTE: If your program or update is on CDROM and you are using Win 95/98/NT/00/XP, the SETUP program will start automatically (AUTORUN) when you insert the CDROM with normal operating system settings.*

*SETUP will survey your system and will ask you for appropriate choices. The first question asked is the location of your Program Master Disk. Unless you are installing over a network, this will be your CDROM or your diskette drive.*

*After a successful Install or Update, the SETUP program will ask the operator for permission to install the DATASMITH Payroll Icon.*

## ● MS-DOS, DOS shell under LINUX:

*To update your programs from the source drive, type:*

```
{source drive}:INSTALL
```

*EXAMPLE: If your floppy drive is A:, type:*

```
A:INSTALL
```

*INSTALL will survey your system and will ask you for appropriate choices.*

## ● INSTALLATION ACROSS A NETWORK:

*1. Copy the files from each diskette into a temporary Network Directory or Drive. If your Master Disks contain subdirectories, create corresponding subdirectories (keep the same subdirectory name) in your Network Directory. All diskettes should be copied into a single Network Directory.*

*2. At each workstation, follow the instructions above appropriate for your desktop environment. When asked to identify the location of the Master Disk #1 files, specify the data path to the temporary Network Directory as seen from your workstation.*

## Notes on Using the INSTALL utility

A program named INSTALL.EXE (the Windows version is SETUP.EXE) has been included on your master diskette #1, or on a separate INSTALL diskette. With INSTALL, all you have to do to install program revisions into your system is to start INSTALL from any floppy disk drive (called the 'source drive'). The INSTALL utility will "know" the contents of each diskette, and will know whether the diskettes are primarily intended for an initial Installation or an Update. When it needs another Master Disk, it will ask for it.

The INSTALL utility will survey your system to determine if there is already a \PAYROLL directory on any drive. If so, the program will suggest that directory as the destination for the new Installation. There should normally be only one \PAYROLL program directory in your system. In order for us to provide proper telephone support, we strongly urge that the startup directory always be named {any drive:}\PAYROLL. Present and future DATASMITH Payroll utilities will always assume by default that your payroll startup directory (called the USER directory in Version 9.x) is located in \PAYROLL.

**Setup Options:** After you establish the destination data paths, INSTALL will ask the operator to specify the **Install** or **Update** option. "Update" replaces program files, but does not disturb existing data files. "Install" will replace program files and put test data in your default data directory. With either option choice, the INSTALL program will check the result against a list of required program modules and data files and will report any errors found.

The sample data permits you to immediately try out all the features of the system.

**NOTE: The passwords for the Sample Data files are 'PW1' and 'PW2'.**

When you are ready to put your "real" data into the system, you can simply Terminate the sample employees (change Status to "Terminated" on the Employee Data Entry and Changes screen) and run Year End Update (on the Initialize and Utilities menu) to remove them from the file. Then you can modify the Company Data and add your own employees to the file.

The sample data may also be permanently removed by erasing all files of the form "PR{date}.PAY", "JF{date}.PAY", and the file "MASTER.PAY". If you erase "MASTER.PAY", you must then use Set Company Data (from the Main Menu: CO-SE) to build your own payroll master file "from scratch".

### HOW PAYROLL USES YOUR HARD DISK.....

From your Computer's point of view, hard disks are divided into several lettered disk "drives"; and these are further subdivided into "directories". These "drives" are like the Volumes in a set of books, and the directories are like chapters within one volume. If you are running only one payroll on a single PC, you can put all the payroll files in a single directory, if you wish. However, even on a single-user system, most people find it easier to manage their system when each different type of file is kept in a distinct directory.

#### 1. DURING INSTALLATION

**On DATASMITH Payroll versions through 8.x**, the startup directory contains user setup files, program files, and test data (which may be overwritten with "real" data by the operator after initial installation). There is only one data path specified by the operator, and the default data path is:

```
{any drive:}\PAYROLL
```

On **DATASMITH Payroll Version 9.x** and later systems, the operator may be asked to identify additional directories as follows:

USER directory	This is the directory from which the program is started on a given workstation. Each workstation on a network will have its own USER directory. The default path for the USER directory is: {any drive:}\PAYROLL
PROGRAM directory	This directory contains shareable program modules. On a network, this directory can be located on a network drive to allow all users simultaneous access. The default path for programs will is: {any drive:}\PAYROLL\PROG
HELP directory	This directory contains shareable HELP files. On a network, this directory can be located on a network drive to allow all users simultaneous access. The default path for the HELP directory is: {any drive:}\PAYROLL\HELP
DATA directory	This directory, identified only when the Install option is chosen, will contain the Test Data files. Other data directories are established later by the operator, and need not be identified during INSTALL. In general, to avoid the possibility that "real" data might be over-written with test data, the operator <u>should not</u> identify "live" data directories as "DATA" directories during INSTALL. The default path for the DATA directory is: {any drive:}\PAYROLL\DATA

## 2. AFTER INSTALLATION

Your payroll system allows you to put your data in a different directory and/or disk drive. This feature allows you to select and run several different payrolls for one or more Companies while using only a single copy of DATASMITH Payroll on your hard disk. When you select a payroll to work with, your programs "find" the correct data by using the data path you specify. This data path is displayed above the Main Menu after the legend "**Program expects data in: ...**". Other payroll data files are created during operation of the system, but all payroll data file names end in **".PAY"** so that you can easily recognize them.

Additional DATA directories are created for each payroll by using the Data Path selection on the Main Menu to establish the directory, and then using Set Company Data (from the Main Menu: CO-SE) to create a new payroll Master File.

Additional specific information on creating and managing directories in your system is contained in your DOS, WINDOWS, OS/2, or LINUX operating system user's manual.

## NOTE TO SYSTEM ADMINISTRATORS

### INSTALLATION ACROSS A NETWORK:

1. Copy the files from each diskette into a temporary Network Directory or Drive. If your Master Disks contain subdirectories, create corresponding subdirectories (keep the same subdirectory name) in your Network Directory. All diskettes should be copied into a single Network Directory.
2. At each workstation, follow the instructions above appropriate for your desktop environment. When asked to identify the location of the Master Disk #1 files, specify the data path to the temporary Network Directory as seen from your workstation.

**Presetting Data Paths:** When DATASMITH Payroll is started, the program reads a file named CTRL.PAY (which is a comma-delimited text file) in the USER directory to determine the data path and the video settings to be used upon initial entry into the program. If this file is not present, the program will look in the USER directory for payroll data, and will use its built-in default settings for the screen colors. You can cause payroll to start up using a particular data path by copying an appropriate CTRL.PAY file into the USER directory before starting payroll. The program will create a new CTRL.PAY each time the operator uses the DP (Data Path & Video Changes) selection on the Main Menu, so you can use the program to create appropriate CTRL.PAY files.

**Special Termination Procedures:** When the operator exits from DATASMITH Payroll, the program will execute a batch file named PAYEXIT.BAT if it finds this file in the USER directory. You may use this feature to perform any "cleanup" or other procedures when the operator exits from payroll.

**Data file Backup:** All payroll data files are of the form "\*.PAY". The program files are contained on your master diskettes, and you should make one backup copy of the programs. If your backup program has a compression feature, you will find that it works very well on payroll data files: compressions of 5:1 to 10:1 are common. If you need to restore data files, always check with the payroll operator before restoring the file MASTER.PAY: this file contains all of the most recently-entered data, and restoring an old copy will have the effect of "turning back the clock" to the time the backup was made...and thus erasing the operator's most recent work. The other data files do not change once they are named, and may be safely restored at any time.

## RUNNING MULTIPLE PAYROLLS

If you calculate payroll for multiple years at the same time, several clients, multiple companies, or multiple pay periods the following setup procedure is recommended:

1. From the Main Menu, choose "Data Path & Video Changes" menu (DP), and then "Select path from library" (SL). Add your data path to the list if it does not already appear: enter the **complete** data path for the payroll, a distinctive display name, and a two-letter select code.
2. From the Select Data Path Menu, highlight your payroll and choose "Select Item" to activate.
3. From the Main Menu, choose "SET company data" on the COMPANY data entry & changes menu (CO - SE). If the data path does not already exist, the program will create it and copy the Tax Table file (TAXTBL.PAY) from the program directory (\PAYROLL or the default directory) into the new data directory.

It is good practice to make additional directories within the payroll program directory for each client or payroll. For example:

- If you have a single payroll but are finishing up year 2005 and simultaneously beginning year 2006, you could name the new data directories \PAYROLL\2005\ and \PAYROLL\2006\.

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- If you have a client named Smith Company and another client named Jones Manufacturing, you could name the new data directories `\PAYROLL\SMITH\` and `\PAYROLL\JONES\`.

Payroll can deal with disks, directories, or sub-directories of any name in any location in your system. Keeping all subdirectories within the Payroll program directory is simply our suggestion to help you find and identify all of the payroll-related files in your system. If you have reason to locate payroll files elsewhere, this will not affect operation of your payroll system.

Each data directory must have a copy of the tax table "TAXTBL.PAY", and will also contain the major data files MASTER.PAY, KEYFILE.PAY, ALTKEYS.PAY, plus payroll backup files once you start entering data. When the operator establishes a new payroll, the program will create a new directory, if necessary, and will copy the tax table file (TAXTBL.PAY) from the program directory to the new data path. When the operator uses "Set Company Data" (from the Main Menu: CO, then SE), the program creates a new payroll master file named MASTER.PAY.

**IMPORTANT: Make sure the Tax Tables in each client or other Payroll subdirectory are updated at the appropriate time when tax rates change! If you create new payrolls frequently, make sure the Tax Table in your default drive (the \PAYROLL directory) is kept current: this tax table will be automatically copied into any new payroll directories you create.**

From the Payroll Main Menu, you activate the desired client's Payroll data by using "Select payroll path from library" on the DATA PATH & VIDEO changes menu (DP - SL).

## SHARING PAYROLL PROGRAMS ON A LAN

If you do NOT need to support more than one Payroll user, you may skip this section.

Payroll is inherently a batch process. For this reason, only the primary user will know when the data in a given payroll record and/or file is valid, and two users must not share the same payroll data file simultaneously when the file is being updated during Periodic Entry, Manual Check, Calculation, Company Data Entry, or Employee Data Entry. However, for purposes of the LAN software, all Payroll data files should be flagged "Sharable Read/Write" or the equivalent in the language of your LAN, as Payroll uses mixed-language "Child Processes". For your convenience in identifying them, all Payroll data files end in the extension ".PAY". Two or more users can share the same payroll data file simultaneously when the file is only being read in order to produce reports during any of the Reports menu, Master Reports menu, Comparative Reports menu, or W-2 menu selections.

Two or more users **can** share the payroll programs to allow working on two different payrolls simultaneously. Each user must have a directory unique to that user for Payroll's working files and the CTRL.PAY file which defines which payroll that user is working with. **Under no circumstances should payroll working files be shared among users!** To set up this configuration:

1. Put all Payroll programs in a single directory (\PAYROLL). If this is a network directory to be shared by multiple users, add the following to AUTOEXEC.BAT on each workstation:  
SET PAYPATH = {drive}:\PAYROLL
2. Modify AUTOEXEC.BAT or use another means to guarantee that the \PAYROLL program directory is in the PATH for each user when Payroll is activated.
3. Make a working directory for each user (\USER1\, \USER2\, etc.). Copy PAYROLL.BAT into each working directory. If you wish to have a special procedure run upon exit from Payroll,



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create a file named PAYEXIT.BAT which contains the procedure and copy it into each working directory.

4. To start up Payroll for a given user, change the default directory to the user's unique working directory, and type PAYROLL. Example for User #1:

**CD \USER1  
PAYROLL**

**PAYROLL USER FILES:** Payroll USER files keep track of what a particular operator is working on, such as the current Data Path, screen colors selected, etc. On a network, each workstation must have its own USER directory to allow each operator to do work without interfering with the other workstations. If you use the INSTALL program, it will suggest that the payroll programs be placed in a directory named \PAYROLL on your lowest lettered hard disk drive. When operating from only one workstation, we recommend keeping Payroll USER files in a directory named \PAYROLL, which will be the Payroll Program Directory for pre-Version 9 installations. The payroll program refers to the \PAYROLL program directory as the "default drive", and this was the location of all the payroll program files in versions 8.x and earlier. In order to enable us to provide you with proper telephone support, you should always write down the location (drive and directory) assigned to the USER files in your installation. This location is specified by the operator during the INSTALL process, and is contained in the environment variable PAYUSER.

**PAYROLL PROGRAM FILES:** With Version 9.x, most payroll program files are shareable, and should be installed in a directory on a network drive so that a single copy of the program files can be shared by all the users on a network. If you use the INSTALL program, it will suggest that the payroll programs be placed in a directory named \PAYROLL\USER, on the same drive you use for your USER files. After installation, you can determine the location of your PROGRAM files by pressing the {F5} key: the PROGRAM directory will be identified on the System Status Report.

**PAYROLL HELP FILES:** Payroll Version 9.x introduces HELP files, which contain information to guide the operator in the operation of the system. Payroll HELP files [\*.HLP] are shareable, and should be installed in a directory on a network drive so that a single copy of the HELP files can be shared by all the users on a network. If you use the INSTALL program, it will suggest that the payroll programs be placed in a directory named \PAYROLL\HELP, on the same drive you use for your USER files. After installation, you can determine the location of your HELP files by pressing the {F5} key: the HELP directory will be identified on the System Status Report. All payroll Help file names end in ".HLP" so that you can easily recognize them.

On Payroll Version 9.5x and later, the operator can press the {F5} key from the Main Menu in order to obtain the Master File Status Report window. In the center of this window, the locations of the USER FILES, the PROGRAM FILES, and the HELP FILES are listed. On Payroll Version 7.x and later, the location of the Data files currently in use will be listed below the Main Menu.

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## MULTIPLE PRINTER SUPPORT

If your printer is a laser printer connected to port "LPT1:", no printer setup is necessary: choose PRINTER1 (the default) for printed output. If your printer is a dot matrix or ink jet printer, or is connected to another port, or if you need to operate more than one printer, or if you otherwise need to adapt to your printer, see the section on Multiple Printer Support in Appendix A.

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### REAL HELP™

The REAL HELP system for DATASMITH Payroll offers four different context-sensitive mechanisms to get you the help you need by pressing one of the following function keys:

{F1}	Help - Current Menu Item
{F2}	General HELP
{F3}	Specialized HELP (State Tax Notes, etc.)
{F4}	Local Practice (User-defined HELP)

The REAL HELP system is NOT simply another copy of the manual: it is up-to-date supplemental information designed to supplement the printed manual. At this writing, there are well over 100 pages of additional HELP information included with each DATASMITH Payroll system.

#### **{F1}: CURRENT MENU ITEM HELP:**

The description of the current or last menu item highlighted appears. This selection can be used by the operator to answer the question "What does this selection do?"

#### **{F2}: GENERAL HELP:**

A "General Help Overview" appears. This selection contains general instructions for navigating through the system and for using the other HELP selections.

#### **{F3}: SPECIALIZED HELP:**

Some operations, such as completing State Tax Tables, require an in-depth explanation. This selection fetches the appropriate background material to allow the user to operate the program properly. Included with the various kinds of specialized Help are State Tax Notes for each of the 50 states.

#### **{F4}: LOCAL PRACTICE/USER-DEFINED HELP:**

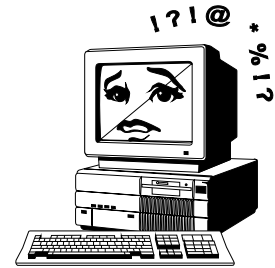
To allow third-party payroll preparers to put their own operating procedures for each client "on line", DATASMITH Payroll will display the text file named "-LOCAL.HLP" located in the current data directory. Local Help preparation instructions are available on request from LPI Information Systems.

**HELP SCREEN PUSHBUTTONS:** When you activate HELP with {F1}-{F4}, the following pushbuttons are displayed at the top of the Help Screen below the Screen Title:

<b>CONTENTS</b> ("C")	Jumps back to the Topic "Contents".
<b>SEARCH</b> ("S")	Displays all of the Topics in an alphabetized list for selection by the operator.
<b>BACK</b> ("B")	Jumps back to the previously-selected Topic.
<b>HISTORY</b> ("H")	Displays the last several Topics in the order they were viewed and allows the operator to select them from the display.



## HOW TO TALK TO YOUR COMPUTER



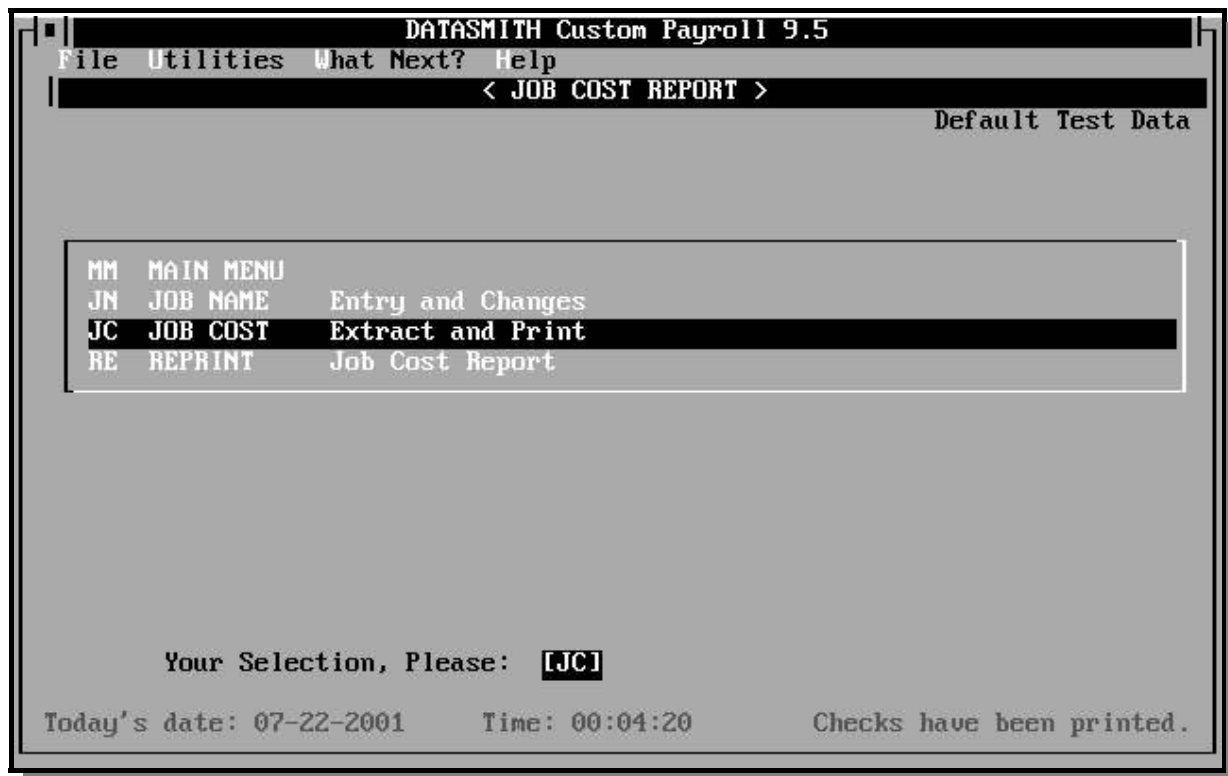
Communication with a machine depends on the correct use of a very rigidly defined language with precise meaning. The computer does not "second guess" on anything, but simply makes comparisons between what you enter and its own programmed vocabulary. The DATASMITH Payroll System communicates with the user by means of certain prompts and then waits for the user to respond by clicking **OK**, **CANCEL**, or another response on a graphical screen; or entering something from the keyboard and then pressing the **RETURN** or **ENTER** key.

Remember that whenever you see a question mark (?) the program is waiting for you to enter something.

In this manual, the terms RETURN and ENTER are used interchangeably to refer to the key that is pressed to terminate a line of input. Payroll will also respond to the left mouse button instead of **ENTER**.

The DATASMITH Payroll System uses prompts that fit one of these general categories:

### 1. MENUS



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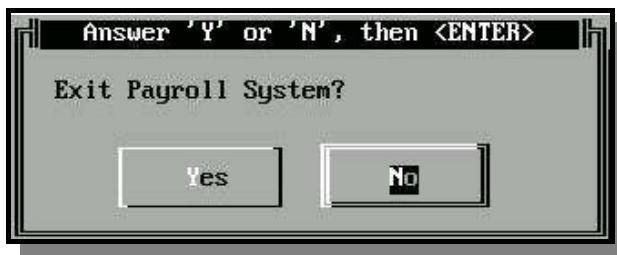
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Menus display the available selections next to a two letter code. You can make menu selections by ANY of the following methods:

1. Enter the two-letter code next to your choice. The Payroll system will react immediately upon your entry of the second character: it will not wait for you to hit ENTER.
2. Use the arrow keys to highlight your selection, then hit ENTER.
3. Use a mouse to click your selection on the menu.
4. Use the pull-down menus via mouse or keyboard:
  - a. Using a mouse, click on one of the selections on the menu bar at the top of the screen. When the submenu for that item appears, click on your choice.
  - b. Using your keyboard, hold down the ALT key to highlight the "Hot Keys" for each selection and then depress that key. This will expose the sub-menu for that selection. Use the arrow keys to highlight your selection and hit ENTER, or depress the "Hot Key" shown.

Pressing ESC while in a menu screen returns you to the next higher level screen.

## 2. PROMPTS THAT REQUIRE A "YES" OR "NO" ANSWER

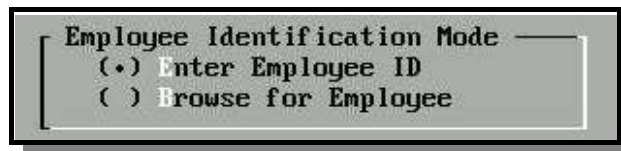


These prompts are questions that can be answered "Yes" or "No" and in no other way. Examples are "Are there any errors?" or "More Changes?" When responding to this type of question, a simple Y or N response is sufficient. The program checks only the first letter of your answer. In many cases a default response will appear for you. The default will be highlighted or appear in brackets

(like this: <Y>), or it will be filled in on a blank for your approval. To use the default, simply press ENTER. If 'Yes' or 'No' choices appear on command buttons, you may also click on your choice.

## 3. MULTIPLE CHOICE PROMPTS

These questions may appear as a set of option buttons (as illustrated to the right) or a list of numbered choices. In either case, you are expected to pick one choice by either clicking it with a mouse, or typing the highlighted letter or number associated with the choice. When the choices appear beside Option Buttons, you can use a mouse to click on your choice. You can select Option Buttons from the keyboard by using the tab key to select the Option area, then use the arrow keys to make your choice, then hit ENTER.

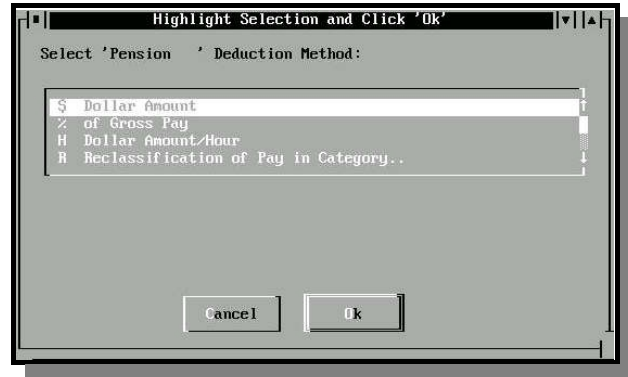


Sometimes "shortcut keys" may appear in choices as highlighted letters. If so, you can simply enter the letter to make your selection. If the screen also contains text input areas, you may have to press the ALT key while entering the "shortcut key" to allow the computer to distinguish between text entry and the shortcut key.

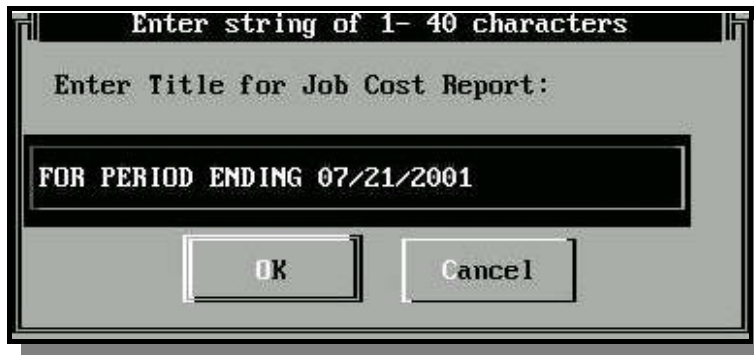
#### 4. Choosing from a List Box:

From the keyboard, you can scroll through the items in a List Box using the up arrow or down arrow keys to highlight your choice, or you can click your choice in the list if you are using a mouse.

Typing the first letter of one of the selections in the list box will cause that item (or the first item to begin with that letter) to be highlighted. Hit ENTER or click OK to make your selection if you have completed all items on the screen, or follow the on-screen instructions to continue.



#### 4. PROMPTS THAT EXPECT A NAME OR DESCRIPTION



These are questions such as "Company Name ?" or "Enter name of ?" and a name or description is expected. Type in the information and hit ENTER or click OK (if present).

#### 5. PROMPTS THAT EXPECT AN AMOUNT

Typical questions that require an amount might be "Enter amount of .... ?" or "Regular Hours ?" and indicate the system expects a number as a response. If anything but a number is entered, the system will display a Redo from start message and you should re-enter. The only valid characters that may be used in an amount are the digits 0-9, a plus or minus sign, and the decimal point. **Do Not** enter any commas in numbers. You do not have to enter a plus sign for positive numbers, as numbers with no sign are assumed to be positive. In addition, you do not need to enter any leading zeros before a number or trailing zeros after a decimal point (just like a pocket calculator).



Examples: 45 is equivalent to 0045 and 6.7 is equivalent to 6.70.

Remember that computers make a distinction between letters and numbers, even though they may look similar. The letter "L" key may NOT be substituted for the number one and the letter "O" key may NOT be substituted for the number zero.

## Introduction

If you press ENTER in response to a prompt that expects an amount, the value is assumed to be zero. If you enter text when the computer is expecting a number, the computer may ask you to re-enter the value.

### 6. PROMPTS THAT EXPECT A DATE



The screenshot shows a terminal window titled "Enter date (mmdyy, mm/dd/yy, mm-dd-yy, or mm/dd/yyyy)". The prompt asks to "Enter the corrected 'period ending' date". A text box contains the date "01/04/2001". Below the text box are two buttons: "OK" and "Cancel".

Dates may be entered in many different formats. In all cases a date consists of the number of the month (1-12), the day of the month (01-31), and either the last two digits of the year (00-99) or the full 4-digit year (1950-2049). You may separate month, day, and year by dashes (-), slashes (/), or leave the separator out altogether. If you leave out the separator,

the day must always contain two digits (use a leading zero for numbers less than ten), and the year must be either two or four digits. In all cases, the month may be either one or two digits (while your system clock indicates "20xx", two-digit entries between 00 and 49 will be interpreted as 2000-2049). No matter which entry format you use, Payroll will never have a problem with "year 2000" or any other year. Example: May 7, 2005 may be written 5/7/05, 5-07-05, 05/07/05, 05-07-05, 50705, 5/7/2005, 5-7-2005 or 5072005.

### 7. ENTERING AN EMPLOYEE ID



The screenshot shows a terminal window titled "Enter Employee ID (1-10 characters)". There is a large empty text box for input. To the right are "Cancel" and "Ok" buttons. Below the text box is a section titled "Employee Identification Mode" with two options: "(\*) Enter Employee ID" (selected) and "( ) Browse for Employee".

If you know the ID for the desired employee, you can simply type in the employee ID and hitting ENTER (or Clicking 'Ok'). If you know the physical position of the employee record in the file, you can enter a vertical bar ('|' or 'Shift-V') followed by the record number: '|10' would select the tenth employee in the Master file.

If you do not know the employee ID or record number, you can search the selected Master file for the employee by changing the Employee Identification Mode to Browse by typing 'Alt-B' or clicking 'Browse'.

The Browse screen allows you to select any of seven Search Key orders and then browse through the employees listed. On a given screenful of employees, you can jump to a selection by typing the first letter (or number) of the selection. To get another screenful, use the Page Down and Page Up keys or click "Page Down" or "Page Up" on the Browse screen.

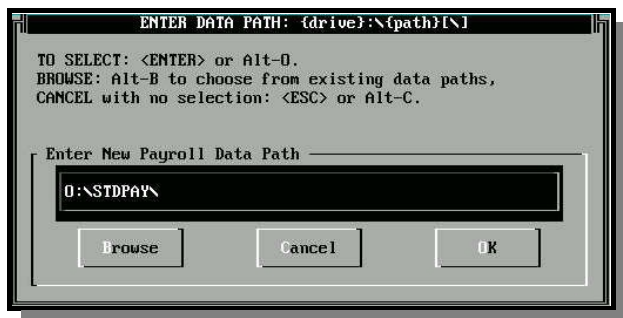


The screenshot shows a terminal window titled "Select Employee". The search criteria are "Search: > 10. By Employee I.D." and "11". A list of employees is displayed:

BAC	CLINTON, BRUCE A.
HJJ	JOHNSON, HAROLD W.
HJW	WEAVER, MARY JANE
TWM	McINTYRE, TIMOTHY W.

Navigation buttons include "<< Previous (PgUp) >", "< Next (PgDn) >>". At the bottom, the "Employee Identification Mode" is set to "(\*) Browse for Employee". "Cancel" and "Ok" buttons are also present.

## 8. ENTERING A DATA PATH



The DATA PATH entry screen is illustrated to the left. The program will allow you to Browse your system and select an existing data path.

Some parts of the program will either allow or require a new data path.

To create a new data path, enter it on this screen: if the path does not currently exist, the program will ask your permission to create a new data path.

## OPERATING A GRAPHICAL SCREEN WITHOUT A MOUSE

If you do not have a mouse, or if you prefer to use your keyboard to operate a graphical screen, you can operate the screen as follows:

- Move from field to field with the **TAB** key, or backwards with **Shift-TAB**.
- Close the current window using **Alt-F4** (many windows can also be closed with **ESC**).
- Exit the program using **Ctrl-X**.

## STARTING THE SYSTEM

### **MS-DOS, DR-DOS, Novell DOS, PC-DOS:**

Start your computer in the usual way and select the directory or drive that contains your payroll programs. If you have created a directory named "PAYROLL", the command would be:

`CD \PAYROLL`

Once you have selected the proper directory, enter the command:

`PAYROLL`

### **OS/2:**

1. On the OS/2 Desktop, Double-Click the appropriate Folder.
2. In the folder, Double-Click the PAYROLL Icon.



### **WINDOWS 3.x:**

1. On the Windows Desktop, Double-Click the appropriate Folder or Group.
2. In the folder or group, Double-Click the PAYROLL Icon.

### **WINDOWS 95/98/NT/2000/XP:**

1. On the Windows Desktop, Click START, then PROGRAMS, then DATASMITH Payroll.
2. You can also right-click DATASMITH Payroll and then click "Send To Desktop." This will install the Payroll Icon on the Desktop so that you can simply Double-Click the PAYROLL Icon to start Payroll.

The disk drive should select and the DATASMITH Payroll System MAIN MENU should appear within a few seconds. If not, check to make sure a program named "PAY0.EXE" appears in your Payroll Program directory, and a file named PAYROLL.BAT appears in your USER directory. The PAYROLL.BAT file is the startup program.

**NOTE: The Passwords for the Sample Data files are "PW1" and "PW2".**