PAYROLL DEMONSTRATION INSTRUCTIONS

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Demonstration data is also included with every fully-licensed copy of DATASMITH Payroll.
The Demonstration procedure is useful as a Tutorial to help you learn how to use the system.

The Payroll Demonstration Disk set contains a copy of the actual DATASMITH Payroll system. It is not a "sit back and watch" system. You have access to almost all of the features of the distribution program. The full manual is available on the DEMO screen of our web site at:

http://www.datasmithpayroll.com/

You can also obtain a printed copy of the manual along with a demonstration CDROM from LPI for $39, or a demonstration CDROM without the printed manual for $6.95. For demonstration purposes, please note:

1. You are limited to a maximum of five employees in the master file. The "sample data" contains data for four employees, so you may add one additional employee if you wish. You may also set up a new master file, but it will also be limited to five employees. There is no limitation on a fully-licensed system; regardless of whether you are using the "Demonstration" data or your own data.

2. The state and local tax routines are pre-set for demonstration, and have not necessarily been set up correctly for your State and Locality (we strive to provide the most applicable Demonstration data we have in our library). State Tax notes covering any peculiarities in state tax laws requiring special setup are available from the State Tax Table Maintenance menu by pressing {F3}.

3. **PASSWORDS**: If you are using a Demonstration Data file containing preset Passwords, the Security Officer Password (which allows access to all system features) is "PW1" and the User Password (which allows access to "normal routine" payroll features) is "PW2".

SETTING UP THE DEMONSTRATION PROGRAM

The programs are designed to run on an Industry-standard 386, 486, Pentium or compatible computer. It is also possible to run these programs on a high-capacity removable disk system (such as the 100MB Iomega Zip or 1000MB Jaz disks) without a hard drive. The demonstration requires approximately seven megabytes (7 MB) of space on the drive of your choice. The demonstration will, by default, put all program files in a directory named \PAYROLL.

A CDROM or a set of diskettes are enclosed. The INSTALL program copies all files from the root directory of each diskette to a working directory on your hard disk. In addition, the Demonstration Data is copied from the \PAY subdirectory and HELP files are copied from the \HLP directory into directories you choose during installation.

QUICK-START INSTALLATION INSTRUCTIONS

WINDOWS, WINDOWS 95/98/NT/2000, OR WIN-OS/2:

From the Desktop, select <u>F</u>ile (or START in Win 95/98/NT/00)
On the <u>F</u>ile menu, select <u>R</u>un.
In the <u>R</u>un window, Enter the <u>C</u>ommand line: `A:SETUP`

NOTE: If your program or update is on CDROM and you are using Win 95/98/NT/00, 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.

After a successful installation, the SETUP program will ask the operator for permission to install the DATASMITH Payroll Icon on the Desktop.

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 or CDROM 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.

After using the sample data provided, if you wish to remove the sample employees, you can simply terminate them (first item on Employee screen) and then run Year End Update on the Initialize & Utilities menu. This will remove all the terminated employees from the file and set all current and YTD totals to zero. Use Change Company Data (Company Data Entry & changes screen) to enter your actual company information, and then use Add New Employee Data (Employee Data Entry & changes screen).

If your wish to erase the demonstration data completely so you can build your own files "from scratch", simply erase all files with the extension ".PAY". When you do this, you will erase all Company Data, Employee, data, history files, and all tax tables. Tax Tables can be completely built "from scratch" by the operator simply by using Tax Table Maintenance, or you can copy the file TAXTBL.PAY from the \PAY directory on Master Disk #2 (or Master Disk #3) into your payroll data directory. Continuing the previous example, the procedure for erasing data from DOS would be:

      C:

      CD \PAYROLL

      ERASE *.PAY

If you wish to remove the entire demonstration including programs and data files, simply erase the entire contents of the \PAYROLL directory.

SUGGESTIONS FOR RUNNING A DEMONSTRATION

The Sample Data included with your Demonstration System contains a four-employee payroll, tax tables, and sample company data. The Employee Master file contains a fully-computed payroll, ready to print reports and checks. We suggest that you perform the operations which follow in sequence for the best demonstration.

> *NOTE: If you should alter or destroy the sample data files during the demonstration, simply re-run the INSTALL program to restore the system to its original state.*

Before starting, make sure your printer is turned ON and is "On Line" (ready to print) if you intend to print reports. If your printer is a laser printer attached to LPT1: you do not have to do any printer setup: choose PRINTER1 for all reports. If your printer is attached to another port, or is a dot matrix printer printing 66 lines per page, you should use the printer setup facility described in the INTRODUCTION under the heading Multiple Printer Support in the Payroll Manual to obtain properly-paginated printer output.

The program is entirely menu-driven. To perform a particular function, simply enter your selection from the menu which appears on your screen.

You may use the Up Arrow and Down Arrow keys or use a mouse to highlight your selection and then ENTER (or Left Click) to confirm your choice. Alternatively, you may type the two-letter designator which appears on the principal menus.

During operation, 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)*

No matter how fast your computer, you will find on-screen reports from DATASMITH Payroll are easily readable. If at any time you want to "freeze" a report displayed on the screen, simply press the space bar once or click "Pause". You can view previous pages by hitting "Page UP", or move up and down one line using "^" and "V". The output will resume when you press any key or click "Resume". To cancel, hit "C" or click "Cancel". To speed up an on-screen report, hit the number "9" on the top row of your keyboard (or click "Faster") : to slow it down, hit "1" (or click "Slower"). Hitting number keys repeatedly will affect the speed more drastically. On wide reports, you can view additional columns by hitting "<" or ">" to move the view left or right.

As you execute the Demonstration Script, note that the general Payroll cycle is:

> **INITIALIZE -→ PERIODIC entry -→ CALCULATE -→ REPORT -→ CHECK**

The Main Menu also has a convenient pull-down reminder of the next major operation in the Payroll Cycle under the legend "What Next?" You can activate "What Next?" from the keyboard with Alt-W or by clicking on it with a mouse.

Recommended Demonstration Script:

1.   *Select MASTER reports from the MAIN MENU, and print the Employee Codes so that you will know the names and Employee I.D's of the sample Employees. You may choose a list in either numeric or alphabetic order.*

2.   *While still in the MASTER reports submenu, print the Employee Master list. This contains all the information that is on file for each Employee, except for actual pay totals. If you are not interested in a printed copy, you can direct this report to your screen.*

3.   *Return to the MAIN MENU and select REPORT. When the sub-menu appears, select "Current report - all employees". This is the complete Payroll Report for the Current Period. Note the other REPORT options available, but do not select the "Check Register" at this time, since checks have not yet been printed.*

4.   *Return to the MAIN MENU and select COMPANY. Choose CHANGE COMPANY DATA from the sub-menu to see the information on file for the Sample Employer.*

DATASMITH Payroll is capable of processing any number of payrolls for different companies: you simply assign a different directory to each company.

You can change the Company data if you wish by entering the number of the line you want to change. Press <ENTER> to move through the Company data screens, eventually ending up back at the COMPANY sub-menu.

> *Note that the SET COMPANY DATA selection is used only to set up a new payroll, and is NOT used after basic Company data has been established.*

5.　*Return to the MAIN MENU and select EMPLOYEE. Choose "Change Employee Data" from the sub-menu and enter a valid Employee number from the Employee Number list you printed in step (1) above. Look through the data screens for at least one Employee. You can change Employee data by entering the line number of the item you want to change.*

6.　*Return to the MAIN MENU and select CHECK to print some sample paychecks from the previous pay period. When asked for the date the period ended, use the date at the top of the Payroll Report you printed in step (3) above.*

Note that the system is "Year 2000-Ready" and will accept dates in any of the following formats:

> *1-18-97*
> *1/18/97*
> *11897*
> *011897*
> *1-18-1997 (version 9.5 and later)*

You will also be asked to enter the date of the first check, and the first Check Number: these may be any numbers for the demonstration.

> *Normally, the Check Number is pre-printed on your continuous check forms so that you can maintain physical control of your blank checks.*

The Check Number you enter will appear in the Check Register for the current period for audit purposes.

7.　*Return to the MAIN MENU and select INITIALIZE. Choose "End of Period" initialization, which will prepare the data file for a new payroll period.*

> *Select the default answer (Yes) when asked if you want to write the new MASTER file to the current Data Path.*

After INITIALIZATION, all Current information will be zero, all Year-To-Date information will reflect the just-completed period, and your system will be ready to accept new payroll data.

8. *Return to the MAIN MENU and select PERIODIC pay period entries. Choose ALL EMPLOYEES on the sub-menu to enter pay data for all of the sample employees. Remember the date you enter when asked for the end of the pay period, as you will need it later. Select the deductions you wish to be in effect for the current pay period, and enter sample hours data for each of the sample Employees. Consult your manual for help in entering hours data.*

    Note that Job Numbers are optional. If you enter Job Number data and create an appropriate JOBNAMES file, you will be able to get a Jobcost Report.

9. *Return to the MAIN MENU and select CALCULATE. Choose CALCULATE ALL from the sub-menu, and enter the same date you used during PERIODIC pay entry in step (8) above. You will see each employee's name as the payroll taxes are calculated.*

10. *To see the calculated pay from the data you just entered, along with the results of any changes you made in Employee Data or Company Data files, return to the MAIN MENU and select REPORT, CHECKS, etc. as before.*

11. *Now that you have two complete pay periods on file, you can INITIALIZE your file and experiment with the COMPARE report function. You can also print sample paper and/or Magnetic Media W-2 FORMS.*

12. *Consulting your manual, try the MANUAL CHECK feature. Print a set of reports after using it to see how your system keeps track of unusual or irregular payments.*

13. *Try the TAX TABLE maintenance feature. Change some of the numbers and execute a new PERIODIC pay entry, using the same data you used in step (8) above. CALCULATE the results and print the REPORT and the CHECKS, noting the effect your changes had on the results. From the TAX TABLE menu, select "State Tax Table Maintenance" and then select a state. Press {F3} to view the State Tax Notes for the selected state. Over 100 pages of detailed setup instructions covering all 50 states are available.*

NOW THAT YOU'RE AN EXPERT *on running DATASMITH Payroll, we're sure that you recognize that it ranks among the most versatile payroll packages available today for any size system. But that's not all: if you need a feature you didn't see, or if you want an existing feature changed to better suit your specific needs, just give us a call. Payroll is our business, and we'll be happy to provide you with any type of optional, semi-custom or custom feature at moderate expense (it's probably already in our Option Library!). We'll be happy to help you interface DATASMITH Payroll to other software, too: our products are "open".*

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