

Payroll Source™ User Guide



Table of Contents

About Payroll Source™	1
Report	1
Canadian Payroll Manual	1
Legislation, Government Documents, Forms	1
Carswell Alert	1
Canadian HRReporter	1
Free Payroll Consultant Hotline	1
Minimum System Requirements	2
How to Log in and Change Your Password	2
Home Page	3
Site Layout and Screen Components	4
Toolbar	5
Navigation Bar	6
Searching	7
Payroll Source Search Wizard	7
Basic Search	9
Boolean Operators	10
Advanced Search	10
Navigating the Results List	11
Frequently Used Payroll Terms	12
Printing	12
Copying and Pasting	12
Keeping Current	13
Support Contact Information	13

About Payroll Source™

Payroll Source is the ultimate research tool for the Canadian payroll professional. It is the first and only resource that brings everything together in one convenient subscription package. Answer **key** payroll questions with confidence; keep on top of new and upcoming developments; and gain access to legal and payroll specific compliance information and advice.

Payroll Source is updated 10 times per year. Included in your subscription:

■ Report

We keep you up-to-date on legislative changes and developments federally and provincially. Included in the report is a regular feature highlighting the answers to questions most commonly asked of the Carswell Payroll Consultant Hotline service. (see below)

■ Canadian Payroll Manual

The full text of the Canadian Payroll Manual, Carswell's leading payroll compliance guide. Find answers to your payroll questions in this comprehensive reference manual. This unique publication puts the information you need at your fingertips. See *Support Contact Information* on page 13 for more details.

Get the help you need on employment standards, taxable benefit assessments, year end reporting and much more. No matter what the province or territory, the Canadian payroll manual is conveniently organized by topic, each chapter labeled to help you easily and quickly find the information you need.

■ Legislation, Government Documents, Forms

Payroll Source also features a complete legislative database, plus 74 payroll deduction and tax forms and 39 CRA's interpretation Bulletins, Circulars, Guides and Forms.

■ Carswell Alert

An exciting e-mail service that delivers valuable payroll news, most recent changes to legislation and the latest updates for all jurisdictions right to your desktop.

■ Canadian HRReporter

The leading journal for HR and payroll professionals in Canada, delivered to you 26 times per year, plus on-line access to current issues and archived articles.

■ Free Payroll Consultant Hotline

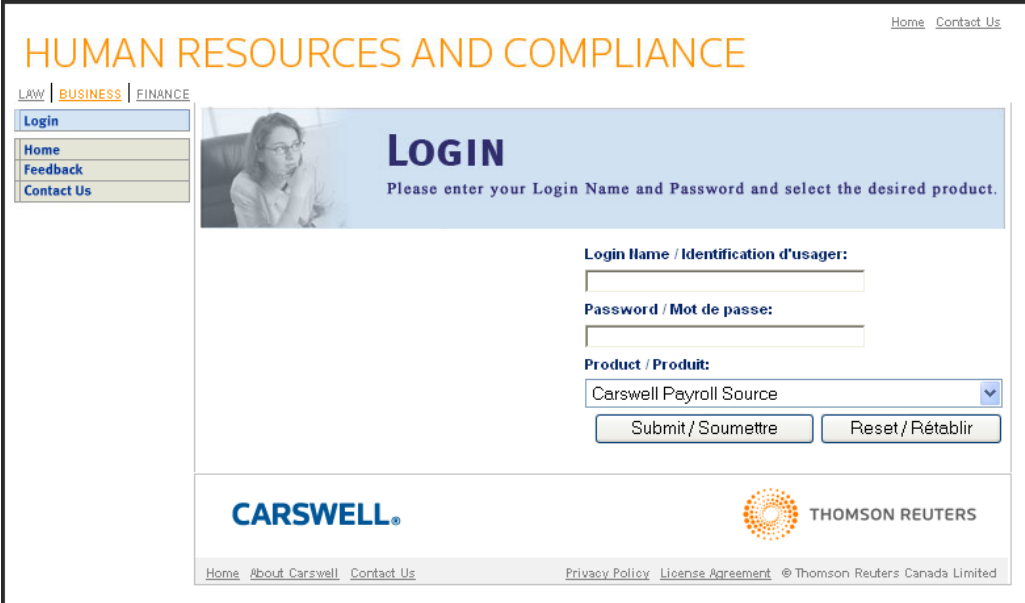
Need assistance? Our professional payroll experts are only a phone call away, ready and willing to help you tackle any payroll issue. Our consultants will provide you with personal, one-on-one assistance and expertise in either English or French. Get immediate answers from a reliable source when you need them! See *Support Contact Information* on page 13 for more details.

Minimum System Requirements

- Pentium III 400 Mhz or equivalent AMD system or better
- 128 MB RAM
- 1024 x 768 resolution screen (or better)
- Internet Explorer 6 or Firefox with the latest patches/upgrades installed

How to Log in and Change Your Password

1. To log in to Payroll Source, use a web browser and access www.carswellbusiness.com



The screenshot shows the login page for 'HUMAN RESOURCES AND COMPLIANCE'. The page has a navigation menu with 'LAW', 'BUSINESS', and 'FINANCE'. The 'BUSINESS' section is active, showing a 'Login' button and links for 'Home', 'Feedback', and 'Contact Us'. The main content area features a 'LOGIN' heading and a sub-heading: 'Please enter your Login Name and Password and select the desired product.' Below this are three input fields: 'Login Name / Identification d'utilisateur', 'Password / Mot de passe', and 'Product / Produit'. The 'Product' dropdown menu is set to 'Carswell Payroll Source'. There are 'Submit / Soumettre' and 'Reset / Rétablir' buttons. The footer includes the 'CARSWELL' logo, the 'THOMSON REUTERS' logo, and a copyright notice for Thomson Reuters Canada Limited.

Figure 1

2. Enter your **Login Name** and **Password** into the fields provided.
3. Select **Carswell Payroll Source** from the **Product** drop-down list.
4. Click **Submit**.

Carswell's online services Subscriber Licence appears the first time you log in. Please review this licence agreement.



Figure 2

On the **Subscriber Licence** page you will be prompted to enter a new password. **By entering a new password you are accepting the terms of the Carswell Licence Agreement.** Confirm your password by entering it a second time and click **Accept**.

Home Page

Once you log in to Payroll Source, the following Home page appears:

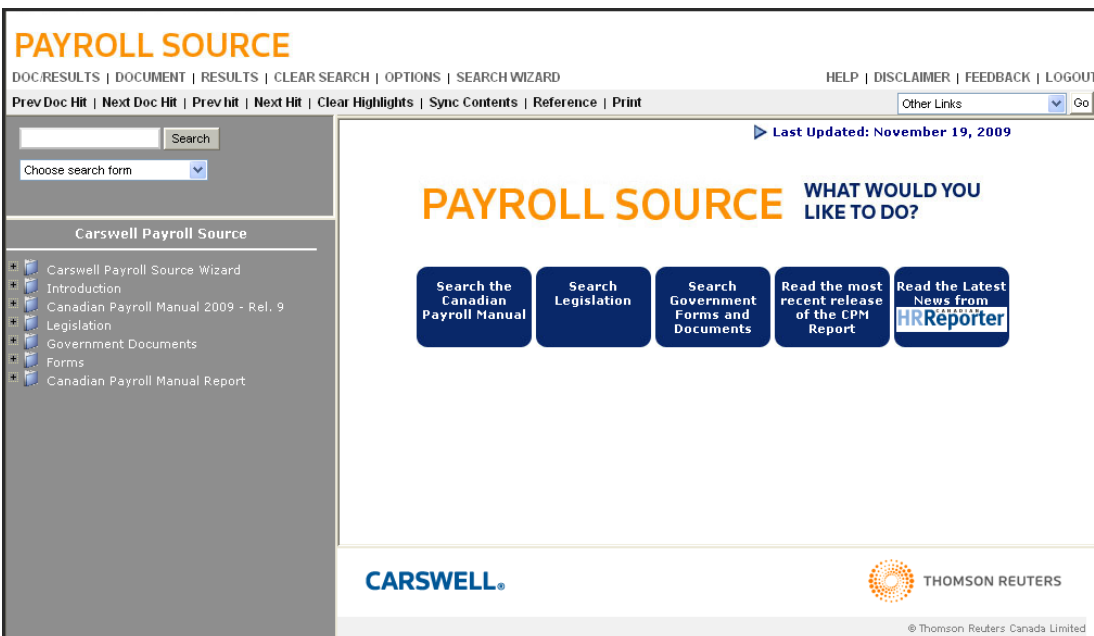


Figure 3

The Home page is a Search Wizard that provides you with several options for searching. See *Payroll Source Search Wizard* on page 7 for more details.

Site Layout and Screen Components

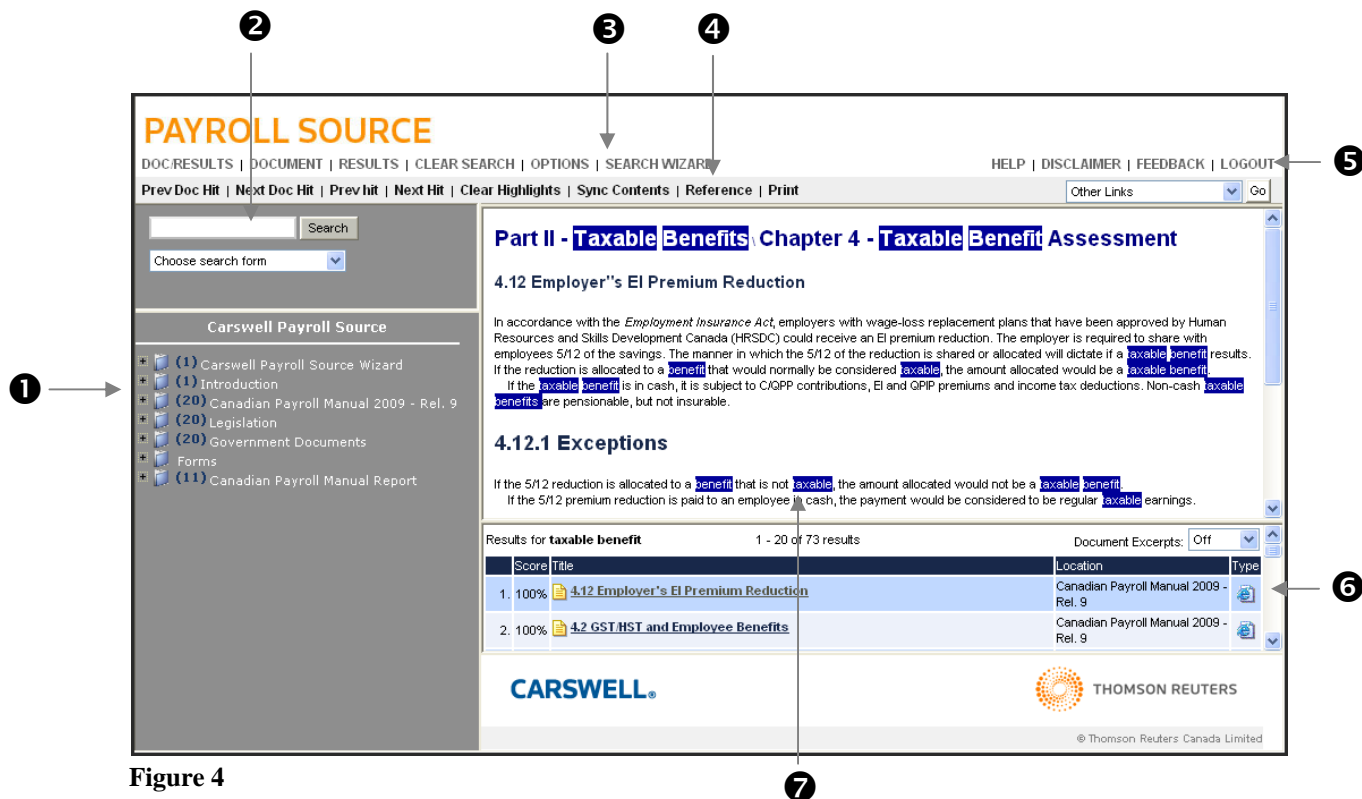



Figure 4

1 Table of Contents

The Table of Contents window, located in the left frame, provides a comprehensive, interactive outline of each chapter along with links to specific document(s) within the chapters. Click the **+** button to expand a heading. To view a document, simply click the document icon  or document heading.

2 Search Tools

The Search Tools, located above the Table of Contents, includes a basic search box and a drop-down list with templates for more complex searching. See *Searching* on page 7 for more details.

3 Toolbar

The Toolbar, located below the Payroll Source banner, provides you with options to change the view of your right frame from full Document view to Document/Results List view to Results List only. You may also retrieve the Search Wizard, clear your search or change your Table of Contents options by clicking the **Options** button. See *Toolbar* on page 5 for more details.

4 Navigation Bar

The Navigation Bar, located below the Toolbar, provides links that allow you to navigate through searched documents. See *Navigation Bar* on page 6 more details.

- ⑤ **Logout** Click the **Logout** button to exit the service.
- ⑥ **Results List Pane** The Results List, located at the bottom of the right frame, lists all documents that match your search.
- ⑦ **Document Window** The Document window, located in the right frame, displays the current document. When you have conducted a search, your search terms will be highlighted within the document.

Toolbar



Figure 5

Use the Toolbar options to change the view of your Document Window and Table of Contents. There are several viewing options to choose from.

- Doc/Results** Split the window horizontally into two frames enabling you to view the document and the Results List simultaneously.
- Document** Display the current document only in the right frame.
- Results** Display the Results List only in the right frame.
- Clear Search** Clear the current search from your database.
- Options** Customize your Table of Contents view.
- Search Wizard** Retrieve the Search Wizard.
- Help** Retrieve the User Guide/Home page.
- Disclaimer** Retrieve the Notice and Disclaimer and link to the Product Licence agreement.
- Feedback** Send Carswell your comments.
- Logout** Log out of Payroll Source.

Navigation Bar

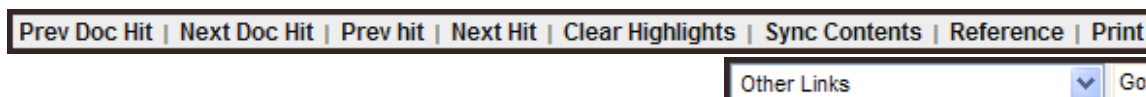


Figure 6

After selecting a document from the Results List, you are free to scroll manually through that document to identify all of its matches. You may use the buttons on the Navigation Bar to navigate results and documents.

Prev Doc Hit	Load the previous document containing a hit.
Next Doc Hit	Load the next document containing a hit.
Prev Hit	Move from one search term to the previous search term within the current document.
Next Hit	Move from one search term to the next search term within the current document.
Clear Highlights	Remove highlighted search terms from the current document. (To have the highlights reappear, simply re-click the document hypertext link from the Results List.)
Sync Contents	Update the Table of Contents to show where the document is located in the database.
Reference	View the Reference Window. The Reference Window displays the location of the current document.
Print	Print the current document or the Results List.
Other Links	Retrieve a list of other payroll-related internet sites.

Searching

There are several options for searching:

- Payroll Source Search Wizard
- Basic Search
- Advanced Search

■ Payroll Source Search Wizard

The Payroll Source Search Wizard appears automatically when you log in to Payroll Source.

The wizard can also be accessed by clicking **Search Wizard** on the Navigation Bar at the top of any page, the Table of Contents on the left frame or from the **Choose search form** drop-down list located above the Table of Contents.

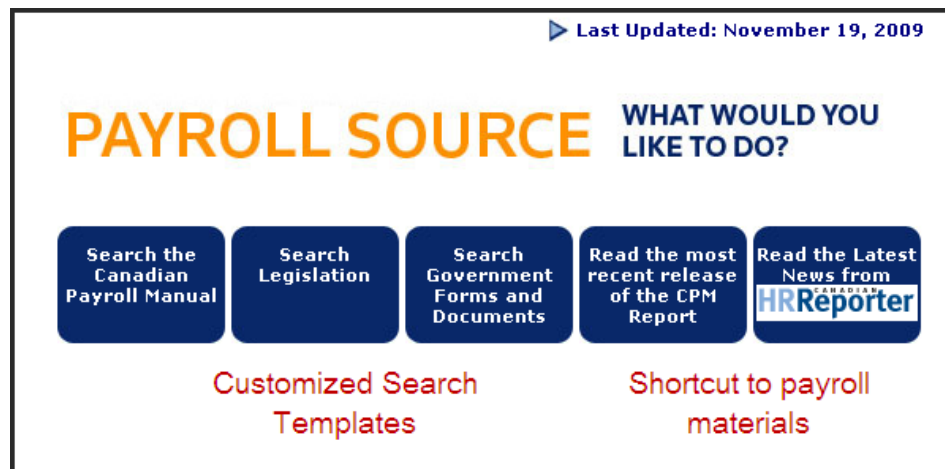


Figure 7

There are five *options* to choose from:

Three customized search templates

- Search the Canadian Payroll Manual
- Search Legislation
- Search Government Forms and Documents

Two shortcuts to Payroll Materials

- Read the most recent release of the CPM Report
- Read Latest News from Canadian **HRReporter**

Customized Search Templates

Click a button to retrieve a customized search template for searching specific data types. Once you access a template, simply enter your search criteria and click **Search**.

Most of the search criteria labels are interactive. Click the underlined label to select keyword(s) from a word wheel.

Search the Canadian Payroll Manual

Canadian Payroll Manual Search Form

Step 1: Enter your search criteria

Select the content you would like to search

Search All of Canadian Payroll Manual

Search Status of Legislation Search Budget Bulletins

Search Year-end Checklist Search Taxable Earnings/Benefits

Search Deductions Search Hospital and Medical Plans

Search Labour and Employment Standards Search Workers Compensation

Search Month-end Reporting

Key Word:

Step 2: Click on Search to view the results

Figure 8

Search Legislation

Legislation Search Form

Step 1: Enter your search criteria

Title: Statutory Section: () ()

Definition: Jurisdiction:

Key Word:

Step 2: Click on Search to view the results

Figure 9

Search Government Forms and Documents

Government Forms and Documents Search Form

Step 1: Enter your search criteria

Select the content you would like to search

Search Government Documents Search Forms Search Both

Key Word:

Step 2: Click on Search to view the results

Figure 10

■ Basic Search

To perform a basic search across the *entire collection of documents*, enter your search terms in the **Basic Search** field. You may use Boolean operators in your search. See *Boolean Operators* on page 10 for more information.

"retirement pension"

Figure 11

After performing a basic search, the resulting references and links to documents containing your search terms will be displayed in the Results List pane. For example, when searching for *retirement pension* the following results appear in the window:

Score	Title	Location	Type
1. 100%	Division B — Calculation of Benefits	Legislation	
2. 98%	Division III — Calculation of Benefits	Legislation	
3. 98%	Division IV — Payment and Conditions of Benefits	Legislation	
4. 96%	Division D — Payment of Benefits: Special Rules Applicable	Legislation	

Figure 12

The first document from your Result List will appear automatically in the Document Window. To view another document listed, click the document hypertext link. See *Navigating the Results List* on page 11 for more details.

■ Boolean Operators

You may use any of the following Boolean operators to create a basic search.

Operator	Example	Result
And	one two one & two one and two	Finds documents containing both <i>one</i> and <i>two</i> .
Or	me you me or you	Finds documents with either <i>me</i> or <i>you</i> .
Phrase	“to be or not”	Finds documents with the exact phrase “ <i>to be or not</i> ”.
Single character wildcard	wom?n th??	Finds documents with <i>woman</i> , <i>women</i> , etc. or <i>this</i> , <i>that</i> , <i>them</i> , etc.
Multiple character wildcard	a*n work*	Finds documents with <i>an</i> , <i>addition</i> , <i>assign</i> , etc. or <i>work</i> , <i>works</i> , <i>working</i> , etc.
Stemming (word form)	run%	Finds documents with <i>run</i> , <i>ran</i> , <i>runs</i> , and <i>running</i> .
Synonym	alert\$	Finds documents with <i>alert</i> , <i>active</i> , <i>aware</i> , <i>quick</i> , etc.

■ Advanced Search

Advanced Search allows you to perform complex Boolean searches without the requirement of knowing how to structure a Boolean query. You can search *the entire collection of documents* or *a specific section(s)*. Selecting Advanced Search enables checkboxes in the Table of Contents. Use these checkboxes to narrow your search to a specific section(s).

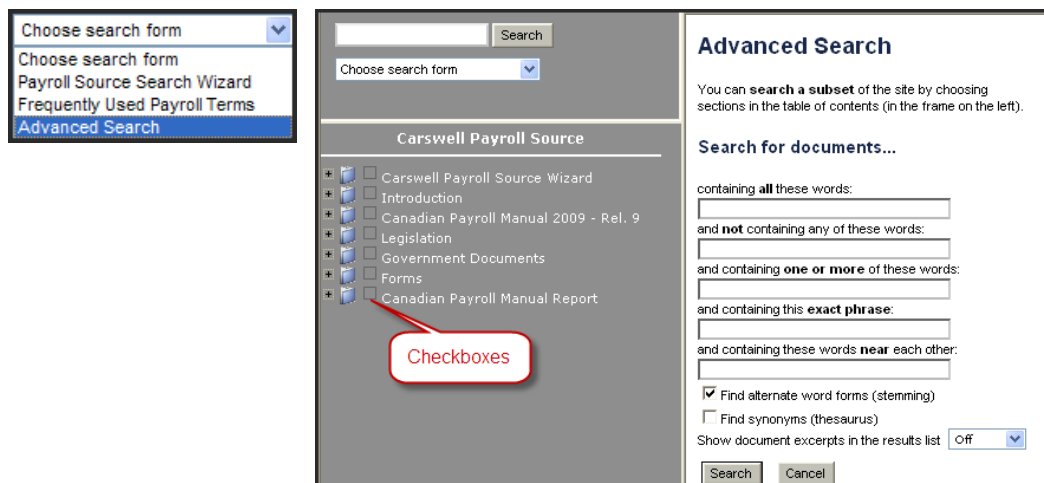


Figure 13

To create your search, simply enter your search terms in the fields provided. You can easily limit the context of your search by selecting a section(s) in the Table of Contents.

Advanced Search allows you to search for specific areas of interest using the following options:

- containing **all** these words
- **not** containing **any** of these words
- containing **one or more** of these words
- containing this **exact phrase**
- containing these words **near** each other

You can also adjust your search by finding alternative word forms or synonyms. Use the appropriate checkboxes.

Show document excerpts in the results list: This option alters the amount of surrounding context information displayed for each result. The context can help you determine whether a document is what you are looking for. Choose *short*, *medium* or *long* for the number of words to display on each side of the key word(s).

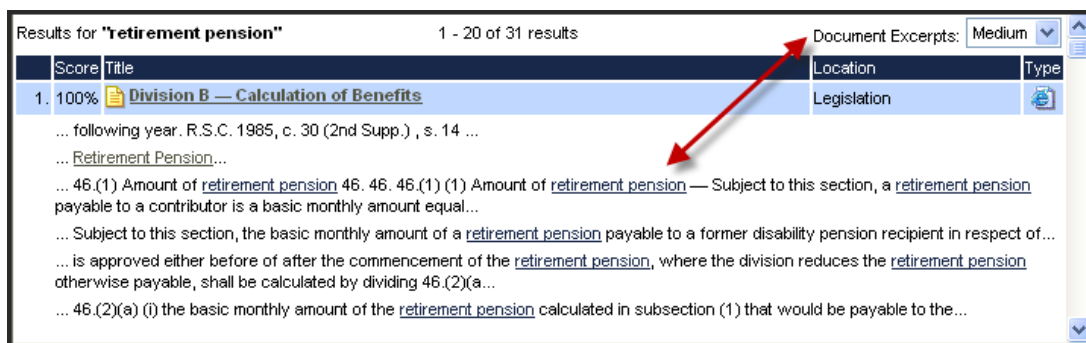




Figure 14

Navigating the Results List

The Results List pane provides several navigational tools.

At the bottom of the Results List pane, click the **down arrow** button  to load the next Results List page. Click the **double down arrow** button  to load the last Results List page.

At the top of the Results List pane (located on Page 2 and subsequent pages only), click the **up arrow** button  to load the previous Results List page. Click the **double up arrow** button  to load the first Results List page.

Frequently Used Payroll Terms

Use this tool to help you refine topics and choose search terms that result in a more effective search.

Select **Frequently Used Payroll Terms** from the *Choose search form* drop-down list.



Figure 15

Click a hypertext link to access the relevant document.

Printing

To print the current document in the Document window or the Results List, click the **Print** button on the Toolbar or use your browser's print option.

To print a selection of text, highlight the text and from your browser's menu select **File** and **Print**. In the Print dialog box, choose **Selection** and then click the **Print** button.

When printing tables or charts, ensure you print preview before printing. Some tables require printing in landscape orientation. To change your orientation, from your browser, select **File**, **Page Setup**, and select **Landscape** from the **Orientation** section.

Copying and Pasting

Using your mouse, highlight the information you want to copy and paste. Go to your browser's **Edit** menu and select **Copy**. Open your word processor's **Edit** menu and select **Paste**.

Keeping Current

Read the Canadian Payroll Manual Report and the latest news from the Canadian **HR**Reporter to keep up-to-date on human resources-related issues. Access these resources from the Search Wizard/Home page.

Support Contact Information

1.800.387.5164
(Canada and United States)
or
416.609.3800
(Toronto and International)

Support Type	Hours	E-mail
Customer Relations Subscription/E-mail/ Address	8:30am – 5:30pm ET (Mon. – Fri.)	carswell.addresschange@thomsonreuters.com
Reference Support	8:30am – 9:00pm ET (Mon. – Fri.)	carswell.reference@thomsonreuters.com
Technical Support	6:30am – 11:00pm ET (Mon. – Fri.) 7:30am – 8:00pm ET (Sat. – Sun.)	carswell.techsupport@thomsonreuters.com
Customer Learning	8:30am – 4:50pm ET (Mon. – Thurs.) 8:30am – 1:00pm ET (Fri.)	carswell.learning@thomsonreuters.com

Payroll Consultant Helpline

Hours: 8:30am – 12:30pm, 1:30pm – 4:45pm ET
(Mon.– Fri.)

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1.800.661.6828 (Elsewhere)