ADP National Account Services
Outsourcing for HR, Benefits and Payroll

SOD on CD ROM – Job Aid

The purpose of this document is to provide clients with instructions on how to install the ADP Tax Filing Service SOD application as well as how to view and print the related SOD information.

Minimum System Requirement:

Windows 95,Windows 98 or Windows NT. A minimum of 8 MB of RAM is required, 16 MB RAM for NT and approximately 10 MB of free hard disk space. A high-resolution color monitor is recommended.
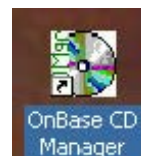
Installation Instructions

Insert the CD-ROM in your drive.

The Setup program will automatically start and guide you through the rest of the setup process. On the "Setup Complete" page, click the "Install application icon on the Desktop" before pressing "Finish". After pressing "Finish", the OnBase CD-ROM Manager will be installed to your hard disk.

With your mouse press the "Add" button. In the "ADD/Modify CD" dialog box press the "Browse" button.

Navigate to the CD-ROM drive and double click on the OnBase.CD file in the root directory. To enable faster logons, you can click the "Auto Logon to Database" box and then enter the Username: **ADP** and Password: **ADPADP**. Press the Save button on the "Add/Modify CD" dialog screen.

*An icon has been saved on your desktop for future use.

Starting the application

To start the application, leave the CD in the disk drive. On the "OnBase CD Manager screen, select the "*company name* Statement of Deposits and Filing" file you would like to view. Double click on the file or highlight it and press the "Launch" button.
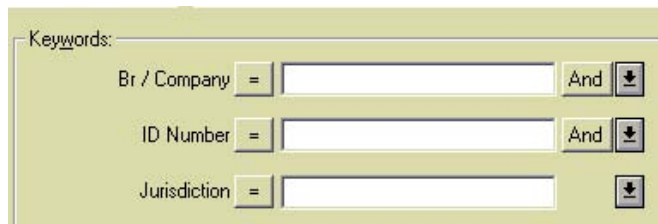

Viewing SODs

You will now see the OnBase Client screen or the Document Retrieval Screen. If you do not see the Document Retrieval Screen, click on the "Retrieve Documents" button on the top left of the toolbar.

Once you are in the Document Retrieval Screen, highlight the "Statement of Deposit & Filings" line in the Document Types section. *(Please disregard the "Document Type Groups" section as well as the "Dates" section.)*

Special Note:
        If you only want to look for information on a specific BCC, Tax ID number or Tax Jurisdiction, you can use the drop down button in one of the fields in the "Key Words" section as shown below.

        Selecting from the "Key Words" section is not required. If you do not select any information in the "Key Words" section, the next step will take you to a full list of all data for your entity on the CD.

You will then either click on the button at the bottom left or simply press the enter key. This will take you to the list of SODs that are available for viewing on the Document Search Results screen. Scroll through the list of SODs available, highlight the SOD you would like to view and press the enter key or double click.

You will now see the detail for the jurisdiction selected. You can view the information as is or you can also view it with formatting by clicking on the "View Overlay" button found near the middle of the tool bar.   Once you are in the overlay view, you can click on the "View Overlay" button again to return to the regular view without formatting.

Printing SODs

To print the SOD you are viewing, either from the "overlay" view or from the regular view:
   • Select File > Print from the menu or click on the printer icon.

It is recommended once on the print screen that you select the "Print Overlay" box to print the SOD with the formatting. This is necessary regardless of which view you are using if you would like the formatting to print.

If you receive an error when printing indicating that there is no paper source defined for this print format, it is because a printer tray is not defaulted as a selection in Windows. Click OK.

Printer Mapping

If your printer is on the network instead a local printer, please follow the steps below prior to printing:

   • While in the OnBase Client screen, right mouse click anywhere in the dark gray area. A dialog box will appear.
   • Click on "Workstation Options".
   • Click on the "Print Queue Mapping" tab. If there is a printer already mapped, highlight it and click the "Configure" button. If no printer is present, click the "Configure" button.
   • This screen shows all of the printers that are available. Highlight the printer that you wish to print to.
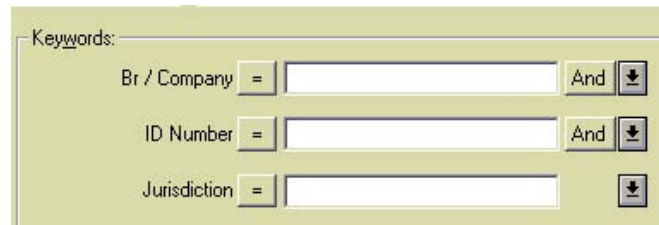   • Click the "Map" button and then click "OK".

Your printer is now properly mapped. This would be the same process to follow if you needed to fax a document from the application.

Exiting the application

To exit the application, select File > Exit from the menu. After that has completed, there will typically be one remaining screen open in the application. Click "Shutdown" on that final screen and the application will then completely close.

Tips:

- The data is stored on the CD and not on your hard drive. The CD is necessary for viewing data.
- To quickly find a specific jurisdiction's SOD, utilize the dropdown buttons in the "Keywords" fields.

- There is not a way to print out all of the SODs on the CD at one time. The print functionality is specific to the jurisdiction you are viewing.
- The Previous Page or Next Page buttons only work on SODs that have multiple pages while you are in the "Overlay View ". It will not take you to the next jurisdiction in the list of SODs available.
- When using the "Overlay View" you can zoom in or zoom out by using the

     buttons in the tool bar.