Installation of WinStabs-NMR

If your machine has certain antivirus software, it may prevent WinStabs NMR from creating a desktop shortcut during the initial download. Check your desktop for an icon named WinStabs NMR. If you can locate the WinStabs NMR icon, skip to step 6. Otherwise, proceed to step 1. Remember, your 2018 data must be balanced, and the Treasurer's Annual Report must be printed before you set up the balances in WinStabs NMR.

System Requirements to open WinStabs NMR:

- Microsoft Access 2010 or newer (32 bit). Microsoft 365 is recommended, but Runtime versions are available. Email **WinStabsSupport@smart-union.org** for assistance.

1. Click the yellow folder in the bottom task bar or the computer icon on your desktop. File Explorer (Windows Explorer in Windows versions before Windows 10) will open on your screen.


2. Click on "Local Disk (C:)." If it is not shown, click on the arrow beside "This PC" and a drop-down menu will appear. Once you have clicked on "Local Disk (C:)," a list of items in the Local drive will appear; double-click on the yellow folder named "WinStabs."
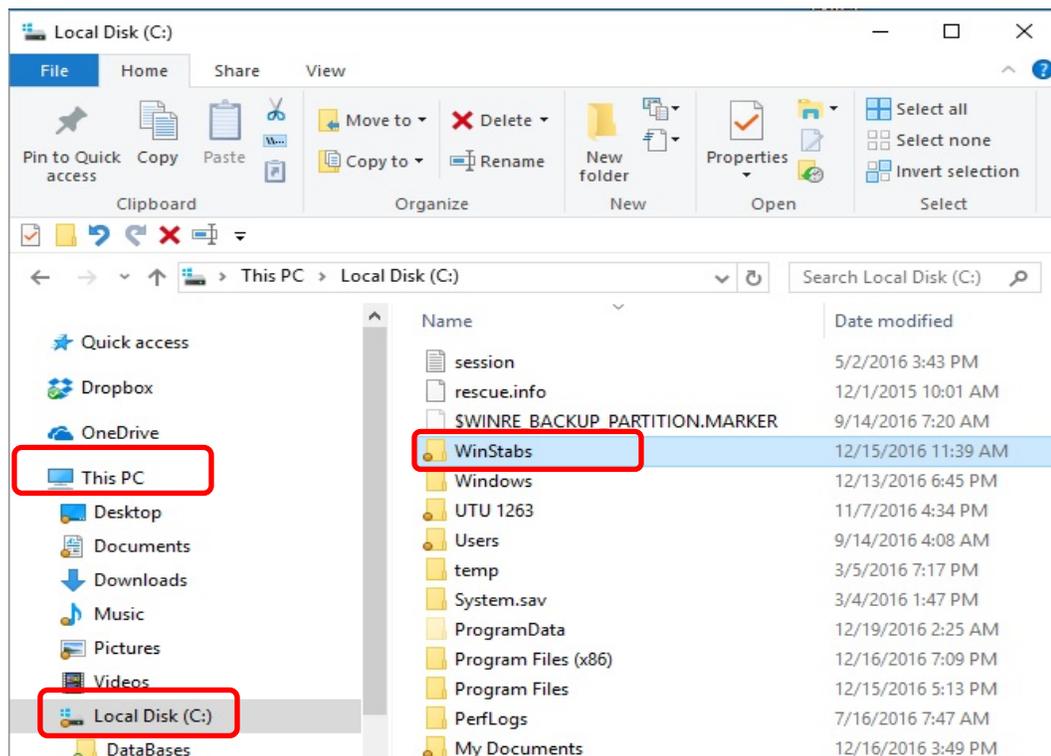
3. You will then see another list of files. Two of the files will have either a purple key or red 'A' icon. These are the two new blank databases that you just installed. Use one of them for your new database; the other one is a backup for use in the future if needed.
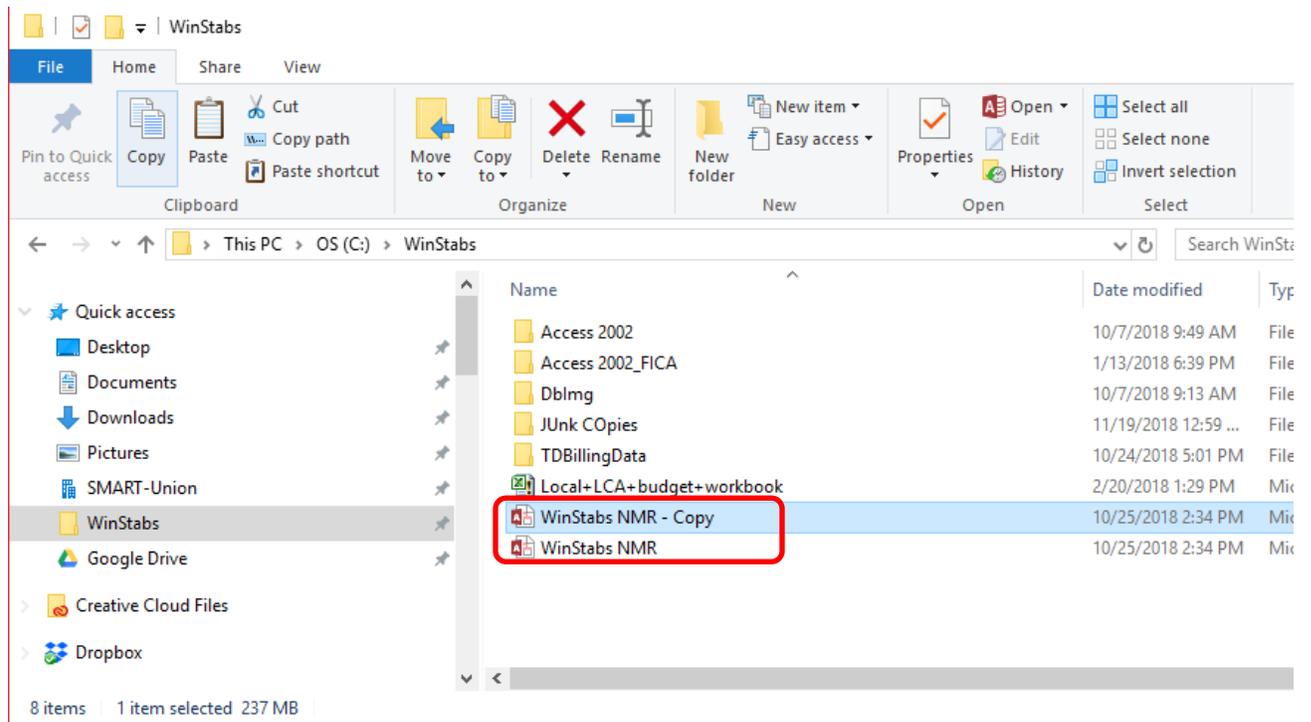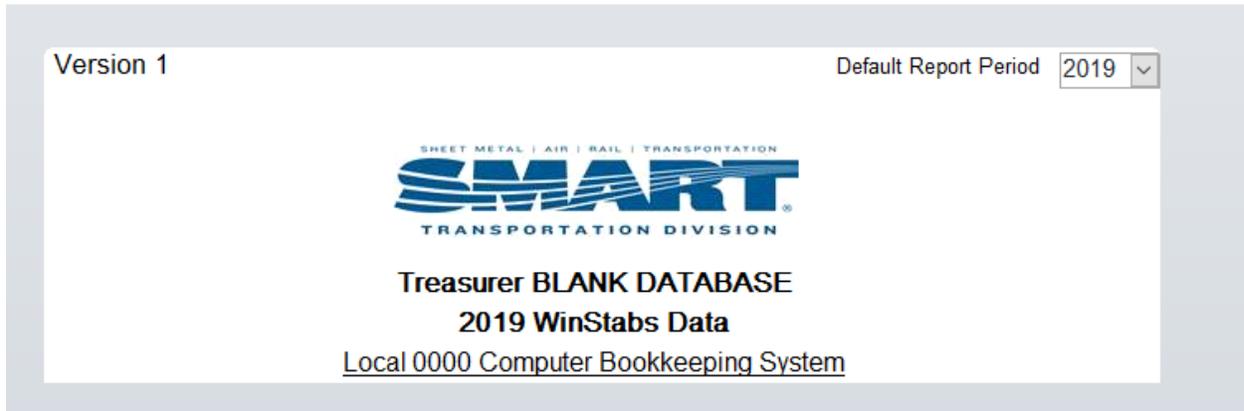

4. Right-click the file named "WinStabs NMR." A drop-down menu appears on the screen. Hover your mouse over "Send To" and a new pop-out menu appears. Click on "Desktop (create shortcut)." This will create a shortcut to the program on your desktop for ease of access.
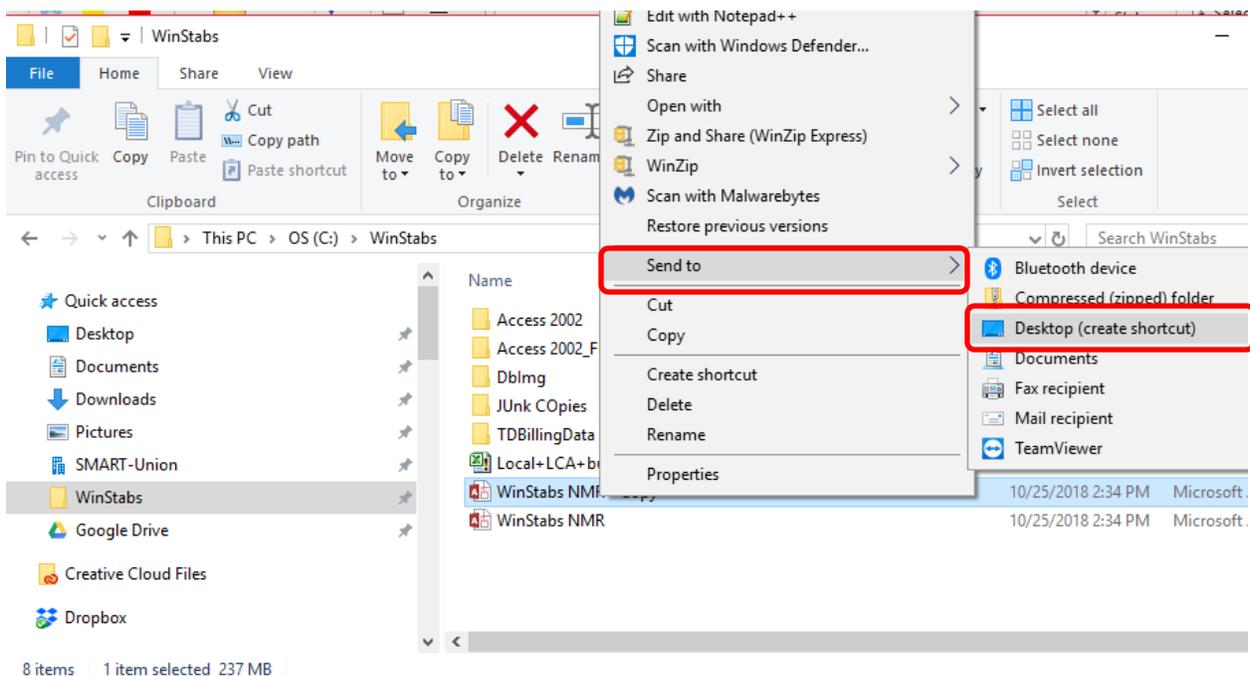
5. Close File Explorer and now WinStabs can be accessed from the newly created desktop icon.

6. Open WinStabs. The database should be blank for 2019.

7. Click on "Treasurer Information" in the ribbon bar and select "Complete Form."

*Note: Set the Federal Tax Type to 941 unless you have been notified by the IRS that you are a 944 filer. Set the Tax Type to CT-1 for Rail locals or FICA for bus locals. Locals 1670 and 1687 are the only two locals that should check the "Local Pays Rail and FICA."

8. Click on "Officer Records" in the ribbon bar and create a record for each current officer. The information can be pulled from previous WinStabs databases or TD Connect.
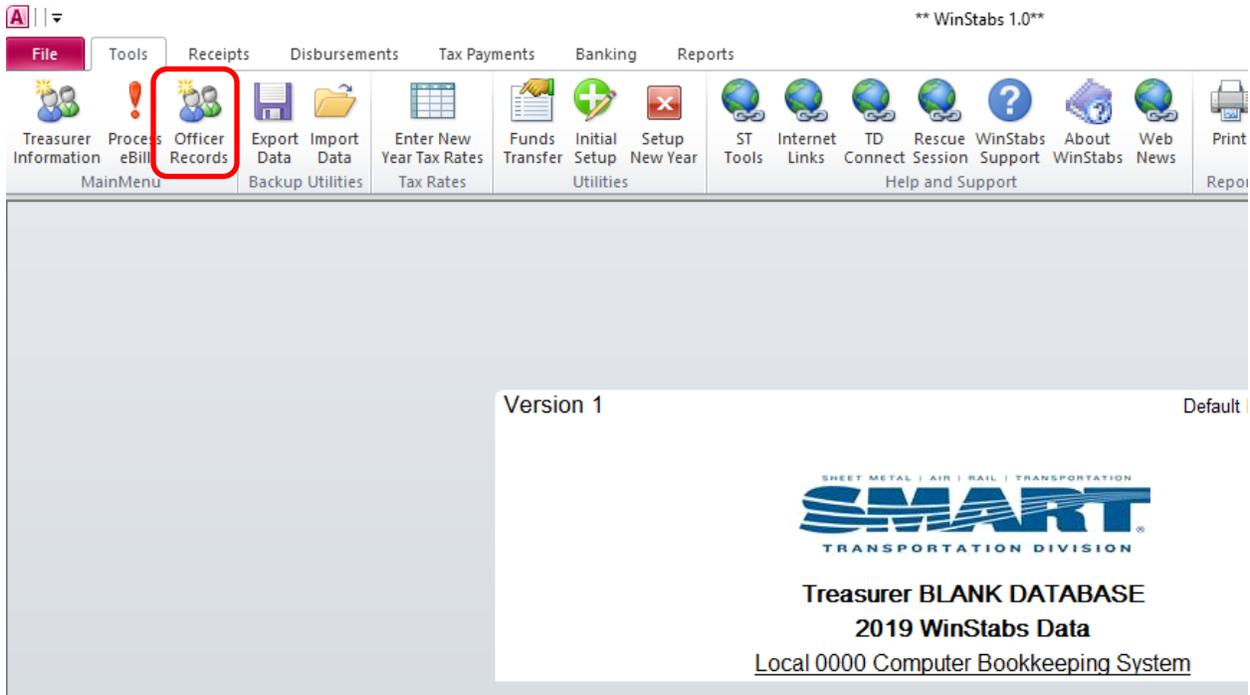
9. Click on "Initial Setup" in the ribbon bar and use the 2018 Treasurer's Annual Report to complete the form.
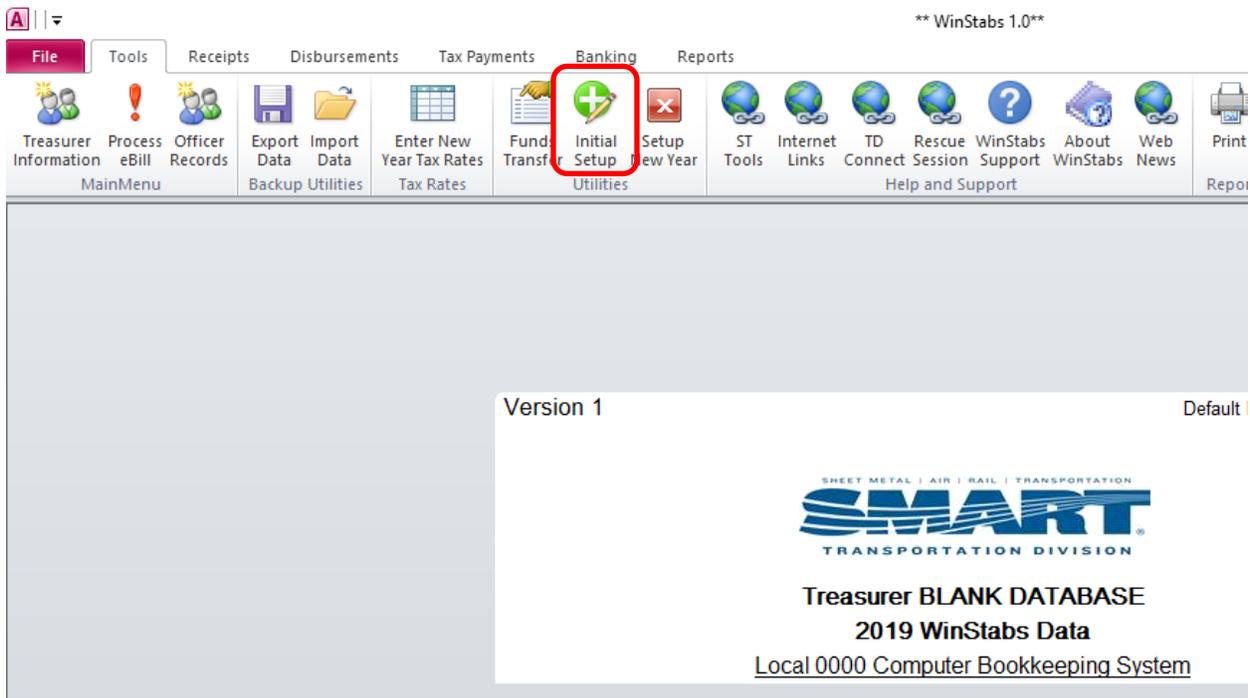
10. Enter all LCA codes and give each committee a name.

*Note: LCA codes should match what is in the TD Connect Local portal. If you have a 999 committee on the Treasurer's Annual Report, do not enter it into WinStabs NMR.

Enter balances from page three of the 2018 Treasurer's Annual Report. The amount from "Total Cash (Checkbook Balance)" on the TAR should be entered as the Local fund beginning balance, and each LCA balance should be entered on the form as the beginning balance for the corresponding LCA fund. If the Local has a savings/investment account, take the amount from "Investments" on the TAR and enter it as the beginning balance on the setup form with the date 01/01/2019. If there is no savings/investment account, leave the date and beginning balance fields blank.

*Note: If there are LCAs listed on your TAR that do not match what is listed in TD Connect, please contact WinStabsSupoort@smart-union.org to resolve the issue.

If you need assistance with this one-time setup, please email WinStabsSupport@smart-union.org for assistance. There will also be a how-to video published on the S&T Tools page of the SMART TD website in January 2019.