

# 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.

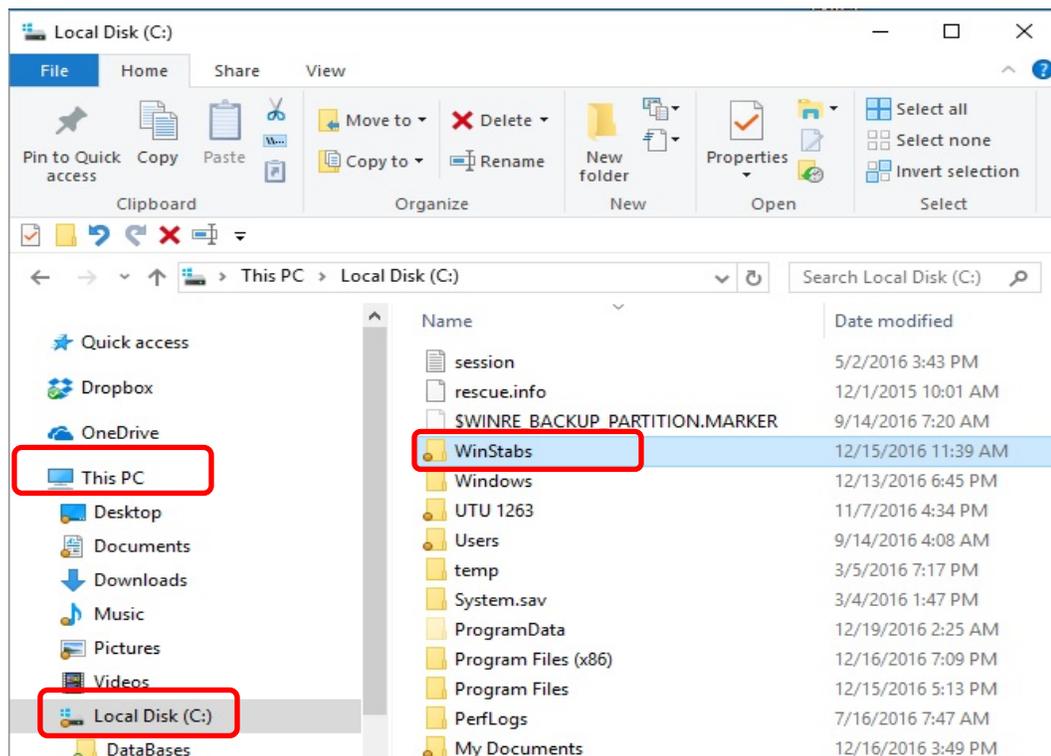
System Requirements to open WinStabs NMR:

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

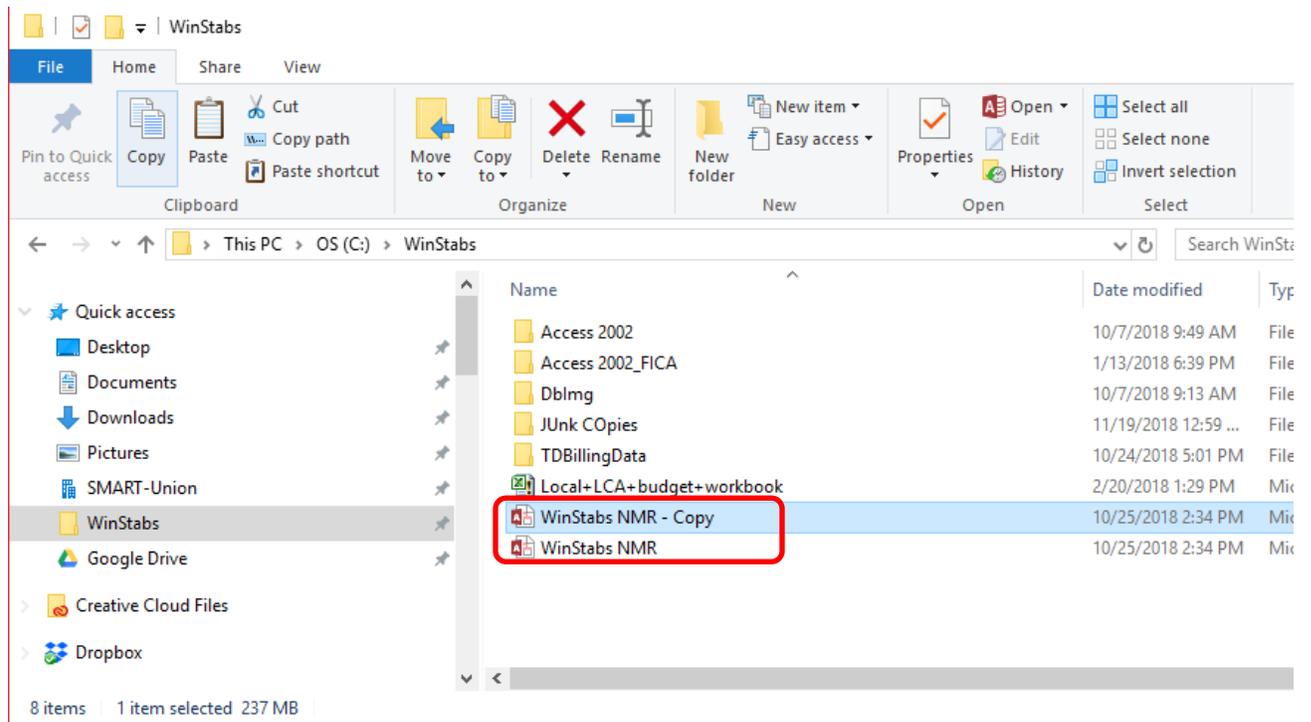
1. Click the yellow folder in the bottom task bar or the computer icon on your desktop. File Explorer (Windows Explorer in Windows versions before Windows 10) will open on your screen.



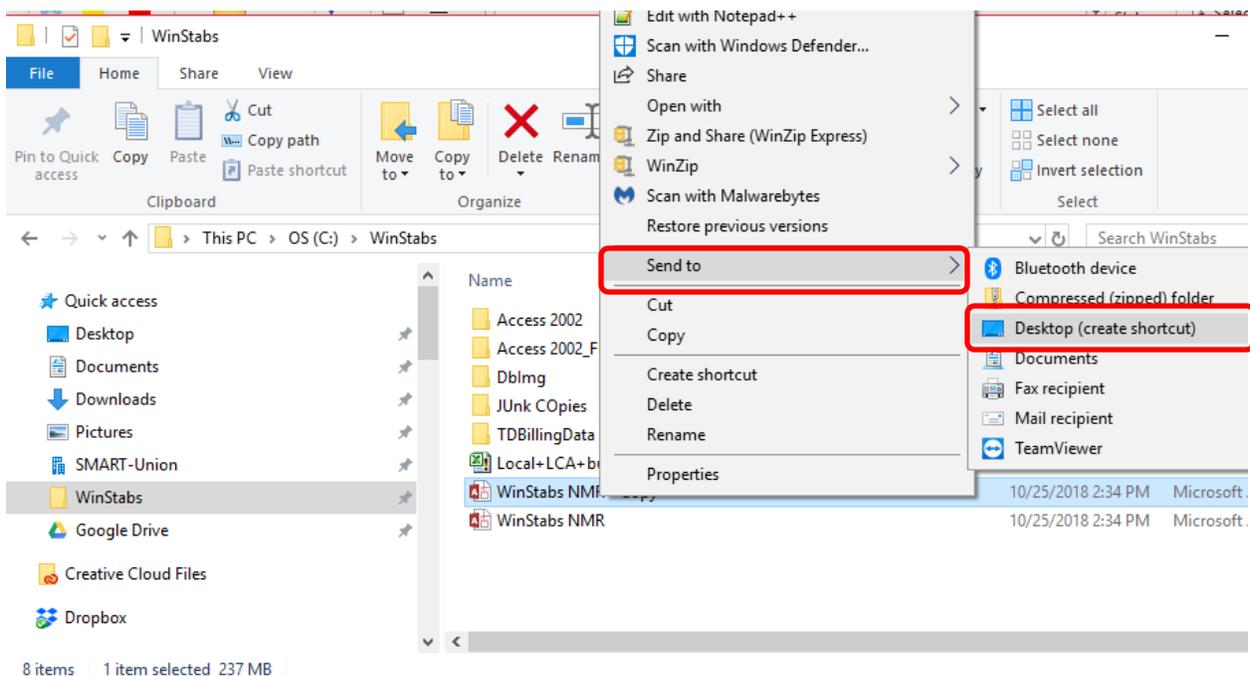
2. Click on "Local Disk (C:)." If it is not shown, click on the arrow beside "This PC" and a drop-down menu will appear. Once you have clicked on "Local Disk (C:)," a list of items in the Local drive will appear; double-click on the yellow folder named "WinStabs."



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.



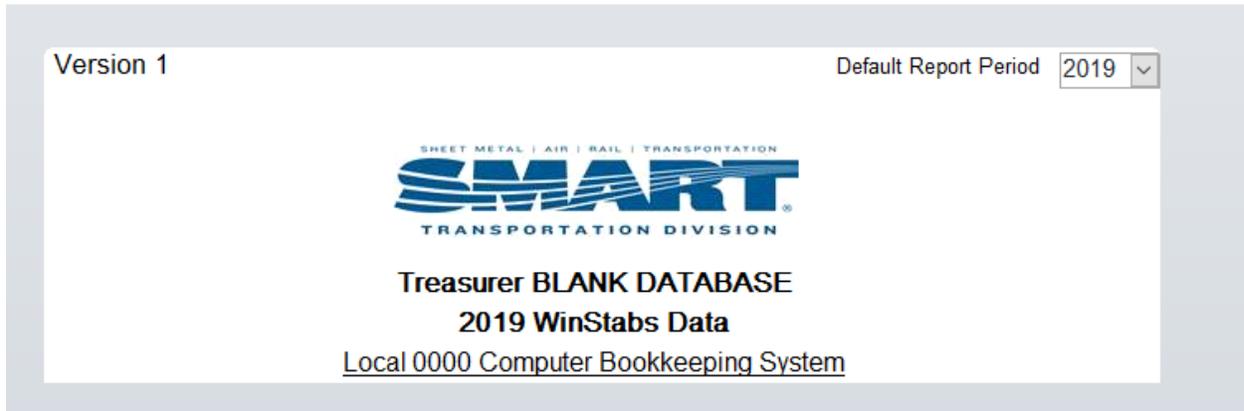
4. Right-click the file named "WinStabs NMR." A drop-down menu appears on the screen. Hover your mouse over "Send To" and a new pop-out menu appears. Click on "Desktop (create shortcut)." This will create a shortcut to the program on your desktop for ease of access.



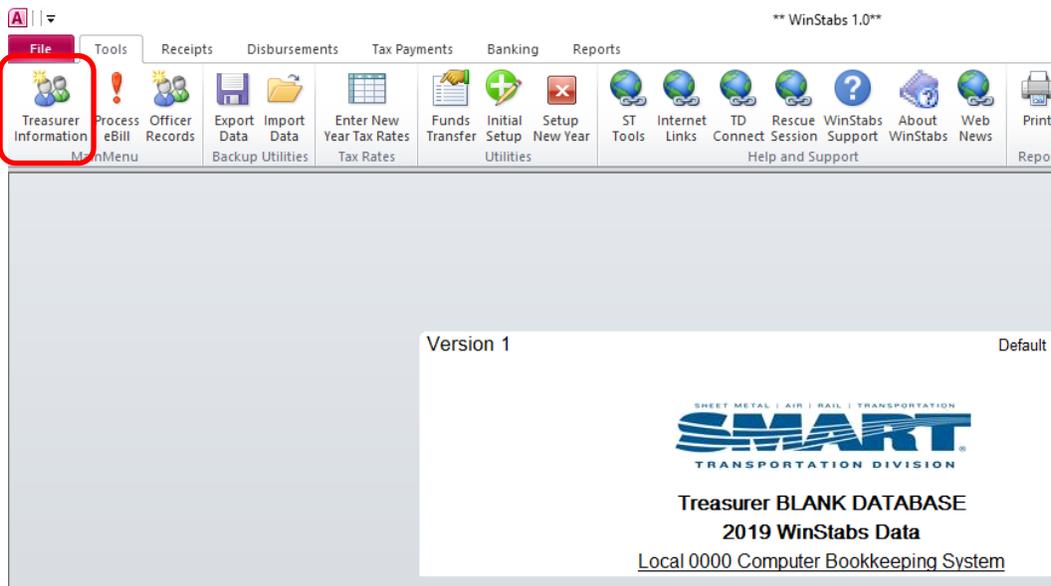
5. Close File Explorer and now WinStabs can be accessed from the newly created desktop icon.

# One Time Setup for WinStabs NMR

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

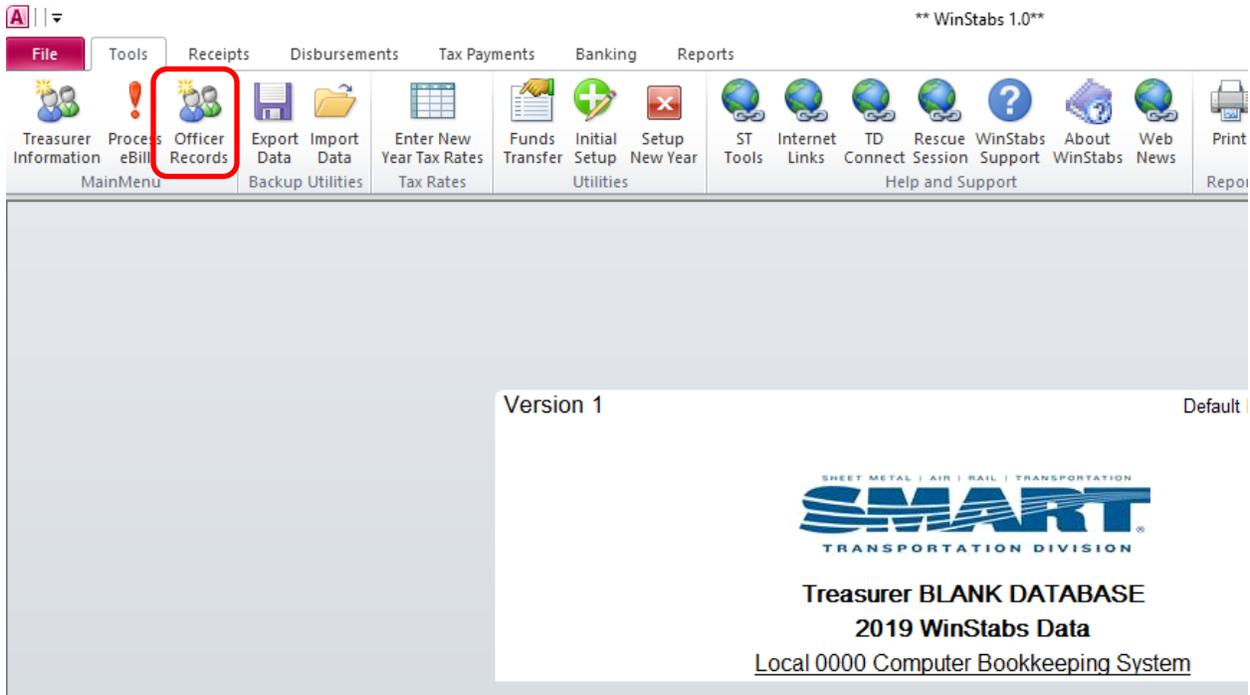


- Click on "Treasurer Information" in the ribbon bar and select "Complete Form."

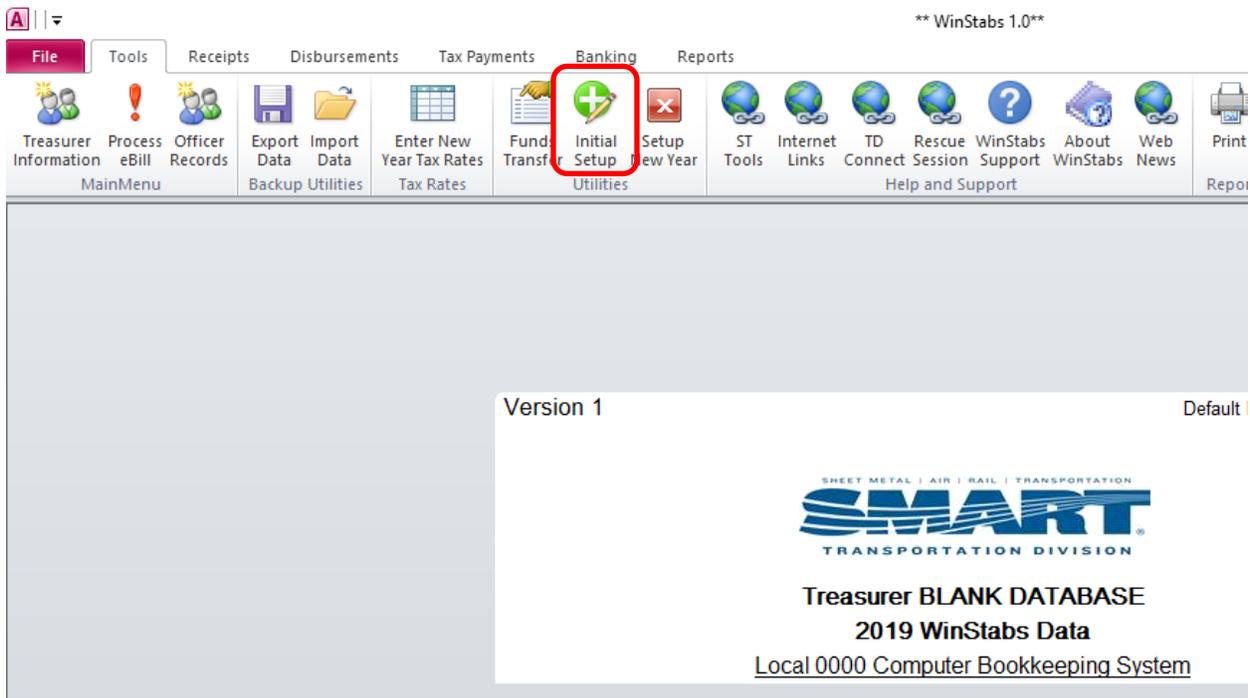
The 'Treasurer Identification' form is displayed. It has two main sections. The left section contains fields for: Local (0000), Year (2019), Name (BLANK DATABASE), Address, City, State, Zip Code, Phone, Mobile, Fax, State1-3, LMFile, EIN, and Payroll Deduction Code. It also has dropdown menus for 'Federal TaxType (941 quarterly or 944 yearly)' and 'TaxType (Rail or FICA [Bus])', and a checkbox for 'Check if Local Pays Rail and FICA'. The right section contains login fields: Eftps EIN, PIN, Password, Bank Name, Banking Login, Banking Password, SSA Login, SSA Password, DDL Login, DDL Password, and DDL Pin (current). There are also links for 'Open Eftps.gov' and 'Open iLink', and fields for 'iLink Login' and 'iLink Password'. A large empty box is labeled 'Other Login Information:'. At the bottom right, there are 'View Report' and 'Close' buttons.

\*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.

The screenshot shows a 'Set Up Local' window with the following sections:

- Beginning Balances - Savings:** A table with columns 'Date' and 'Beginning Balance'. The 'Beginning Balance' is set to '\$0.00'.
- Mileage Rate:** A box containing the value '\$0.545'.
- Close:** A button in the top right corner.
- Beginning Balances - Checking:** A table with columns 'Date', 'Fund', and 'Beginning Balance'. It includes a note: '\*\*\* In This Form "LOCAL" Represents the Checking'. The 'Beginning Balance' is set to '\$0.00'.
- Local Committees of Adjustment:** A table with columns 'Code' and 'Name'. This section is highlighted with a red box. It contains several empty rows for data entry, with a '\*' icon in the first column of the bottom row.

\*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.

The screenshot shows the 'Local Management' portal with the following elements:

- Header:** 'Td connect' logo, 'Local Management' title, and user information 'User: Justin Fougereousse' and 'Local: 9997'.
- Navigation:** A menu bar with 'Home', 'Members', 'Dues', 'Carrier', and 'Union'. The 'Union' tab is highlighted with a red box.
- Sub-navigation:** A sub-menu with 'Local Dues Summary' and 'Officers By Level'. 'Officers By Level' is highlighted with a red box.
- View Officers by Level:** A section with tabs for 'International Officers', 'GCA Officers', 'SLB Officers', and 'Local Officers'. 'Local Officers' is highlighted with a red box.
- Filters:** 'Local: 9998' and 'Officer Positions:' dropdown menus.
- Search:** A 'Search' button and radio buttons for 'Current Officers' (selected) and 'Past Officers'.
- Export:** 'Export to Excel' and 'View Entity Info' links.
- Officer List:** A table with columns 'Local', 'Officer', 'Title', 'Primary', 'Secondary', and 'Email Address'.
 

Local	Officer	Title	Primary	Secondary	Email Address
9998	<b>Local 9998 Officers</b>				
9998	WILLIAMS, ROSEMARIE G	Local President			
9998	BOYD, PAULA R	Local Vice President			
9998	(Vacant)	Local Secretary			
9998	KILPATRICK, MARTIN M	Local Treasurer			
9998	(Vacant)	Local Legislative Representative			
9998	(Vacant)	Local Alternate Legislative Representative			
9998	(Vacant)	Local Delegate			
9998	(Vacant)	Local Alternate Delegate			
9998	HILL, LEO L	Local Trustee			
9998	SAMUELSON, ROBERT E	Local Trustee			
9998	SELLECK, EARL J	Local Trustee			
9998	<b>LCA 101A Committee Persons</b>				
9998	IRIZARRY, ALLEN C	Local Chairperson 101A - GREAT RAILROAD			
9998	KAMMER, ROLANDO H	Local Chairperson 101A - GREAT RAILROAD			
9998	(Vacant)	Vice Local Chairperson 101A - GREAT RAILROAD			
9998	(Vacant)	Secretary of LCA 101A - GREAT RAILROAD			

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 [WinStabsSupport@smart-union.org](mailto:WinStabsSupport@smart-union.org) to resolve the issue.

[ 3 ]

*Treasurer's Report is in BALANCE*

**Set Up Local**

Fund Balances & Committee Names

**Beginning Balances - Savings**

Date	Beginning Balance
01/01/2019	\$2,500.00
	\$0.00

**Beginning Balances - Checking**  
 \*\*\* In This Form "LOCAL" Represents the Checking

Date	Fund	Beginning Balance
01/01/2019	LOCAL	\$8,953.19
01/01/2019	101A	\$234.23
	Local	\$0.00

**Local Committees of Adjustment**

Code	Name
101A	CONDUCTORS

**CATE OF EXAMINATION AND AUDIT**

POSITION (ON DEC 31ST) FROM BANK STATEMENT	\$9,032.64
TRANSIT (NOT APPEARING ON BANK STATEMENT)	\$0.00
CASH AND CHECKS ON HAND FOR DEPOSIT	\$0.00
<b>TOTAL</b>	<b>\$9,032.64</b>
LESS OUTSTANDING CHECKS	\$79.45
<b>TOTAL CASH (CHECKBOOK BALANCE)</b>	<b>\$8,953.19</b>
TOTAL CASH MINUS DISBURSEMENTS -- PAGE 2)	
<b>INVESTMENTS</b>	<b>\$2,500.00</b>
<b>TOTAL CASH AND INVESTMENTS</b>	<b>\$11,453.19</b>

**101A CONDUCTORS**

**101A TRAINMEN**

**LOCAL COMMITTEE OF ADJUSTMENT FUNDS**

Fund	Name	Assessment	Balance
101A	TRAINMEN	\$12.75	\$234.23

The undersigned audited the books and accounts, verifying all E-49 Forms of **JOHN DOE**

Treasurer of Local No. **9998**

in accordance with the requirements of Article Twenty-One B (21B) Section 67 of the SMART Constitution and find balance on hand as reported by the treasurer on the annual report for the period ending 12/31/18 to be correct and accounted for.

If you need assistance with this one-time setup, please email [WinStabsSupport@smart-union.org](mailto: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.