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SMART®

TRANSPORTATION DIVISION

Starting A New Year in WinStabs – 2018

It's time to start making plans on closing out your books for 2017 and getting ready to start 2018. **You can start 2018 before finishing 2017 financial records, but you must work your December 2017 Monthly Billing before you start the new year. This guarantees you start the new year with correct beginning balances in your member records.** Follow these instructions and once you finish closing out the books for 2017 you can update the beginning balances in the 2018 data if needed. There are several steps to take to facilitate a smooth transition into 2018.

➢ Establish a cutoff date of no later than **December 15, 2017** to finish all business for the calendar year. Be sure to write all payroll checks and deposit all payroll taxes that are due for 2017 before this date. **Do not wait until 2018 to deposit your taxes for 2017.** By doing this you allow ample time for all your checks to clear the bank. The perfect end to the year is having all transactions clear the bank by December 31, 2017.

➢ Refrain from making dues refunds in November and December. This will give time for these checks to clear the bank also. Some members tend to hold on to refund checks for a period of time before they cash them.

You will need an iLink account to complete the 2018 WinStabs installation. If you need to set one up, please contact:

Dora Wolf – Updating Supervisor at: dwolf@smart-union.org or (216)228-9400

If you have any issues during the installation process or backing up data to WinStabs, please contact:

Wade Arnold – PC Technician at: warnold@smart-union.org or (216) 228-9400

Starting 2018 Before Finishing 2017

1. Make a new backup of your 2017 data to your "Desktop" by opening your 2017 WinStabs database. Click Tools > Backup Utilities Menu > [Export] Backup Data to Storage
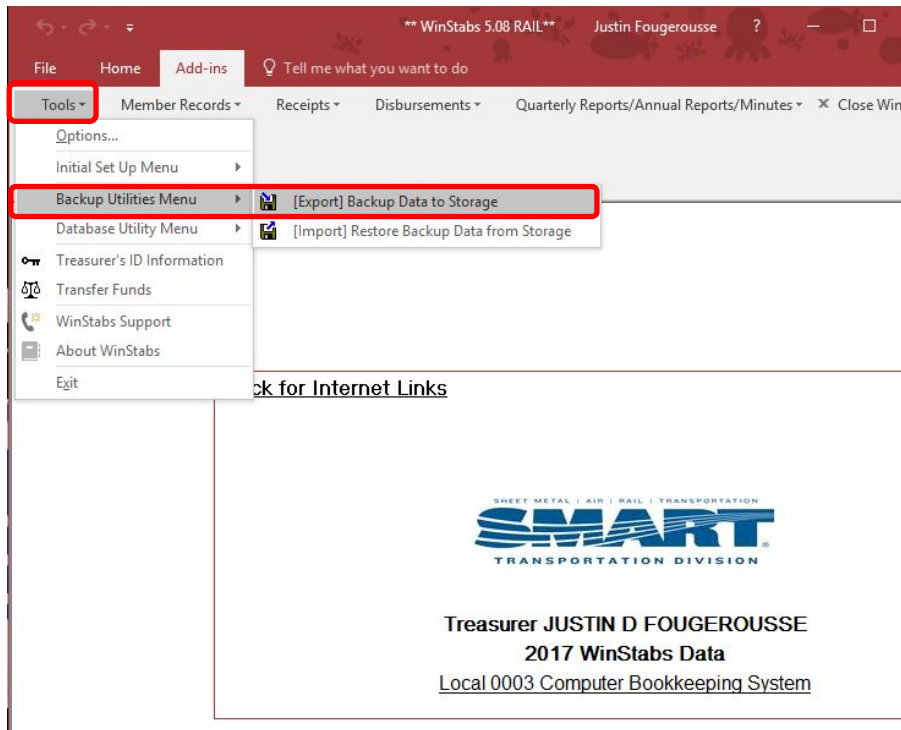

2. Click "Export To". Click "Desktop". Click "OK" three different times as WinStabs creates the backup file.
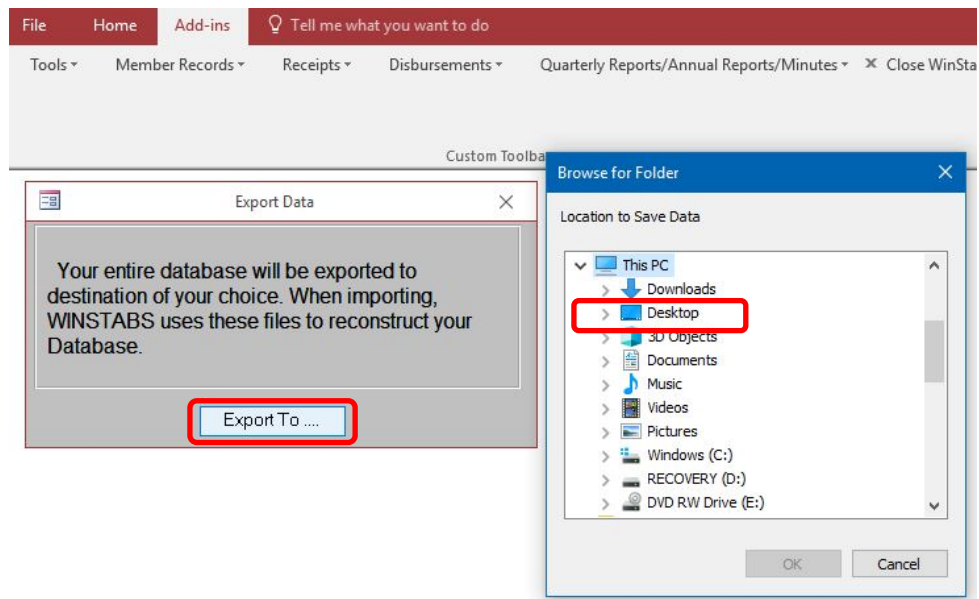
3. Close WinStabs 2017 down until you're ready to finish closing out 2017 books for the year.

4. Download a new version (Version 5.09) of the WinStabs program from iLINK by logging into your iLINK account.

5. Once logged into your iLINK account set your mouse on "TWA" on the blue tool bar and a drop down list will appear.
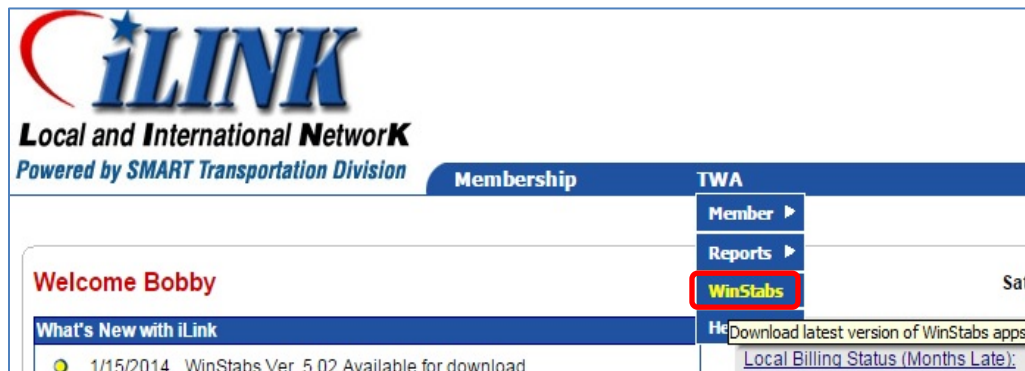

6. If the drop down list does not appear you can click "TWA" and the below menu will appear.
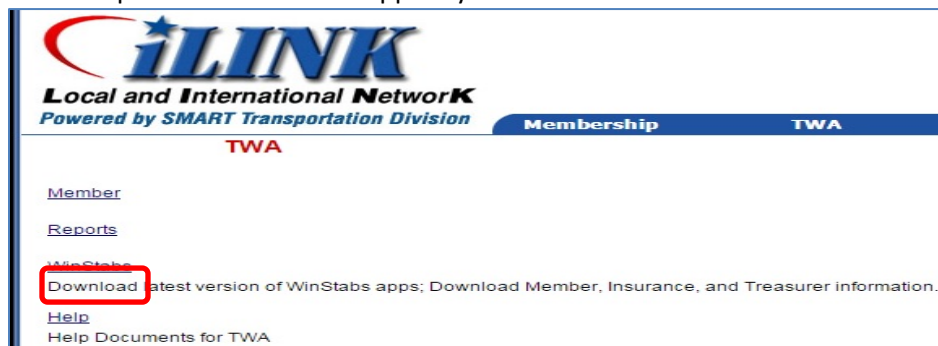
7. Whichever menu you use, click "WinStabs" and the following screen appears. Follow the instructions on the screen to download the new version of WinStabs to your "Desktop". **Make sure to download the correct file that pertains to your type of Local (Rail or FICA). WinStabs-Rail.exe is for Railroad Locals and WinStabs-FICA.exe is for Air and Bus Locals.**
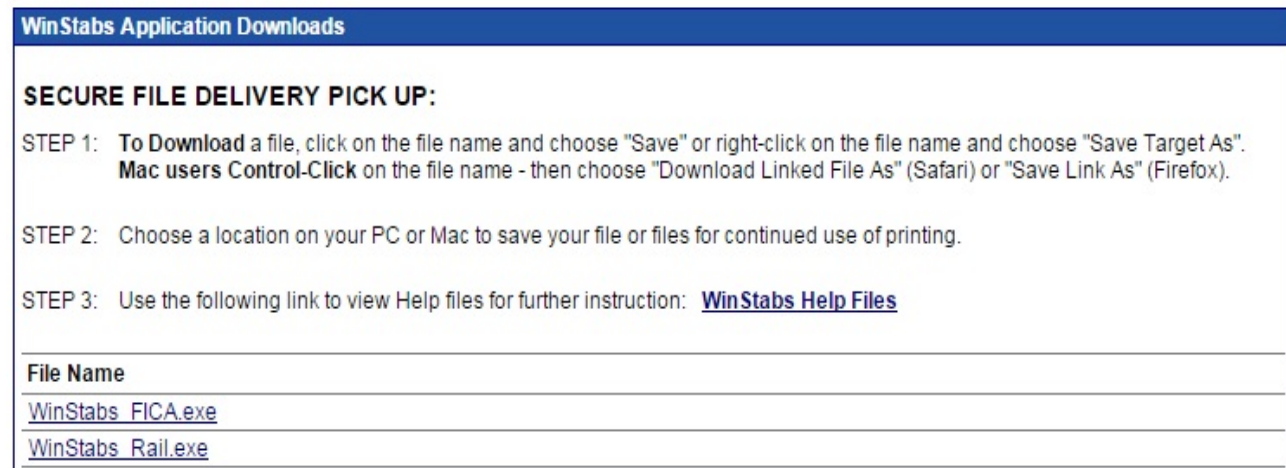
8. Once the download is complete you should see a new icon on your desktop that looks like one of these.
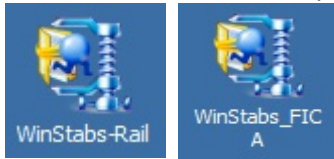

9. Double click the new icon on your desktop and the new version of WinStabs will install on your computer. Once it is installed a .pdf document will open on your screen. This document contains instructions on how to setup a new program and import your old data into a new program. (The below instruction do the same thing)

    ➢ **If you do not have a .pdf program installed (Adobe, Adobe Reader, etc.) you will get an error message on your screen. Do not be concerned, simply close the error message down. The new WinStabs has installed regardless.**
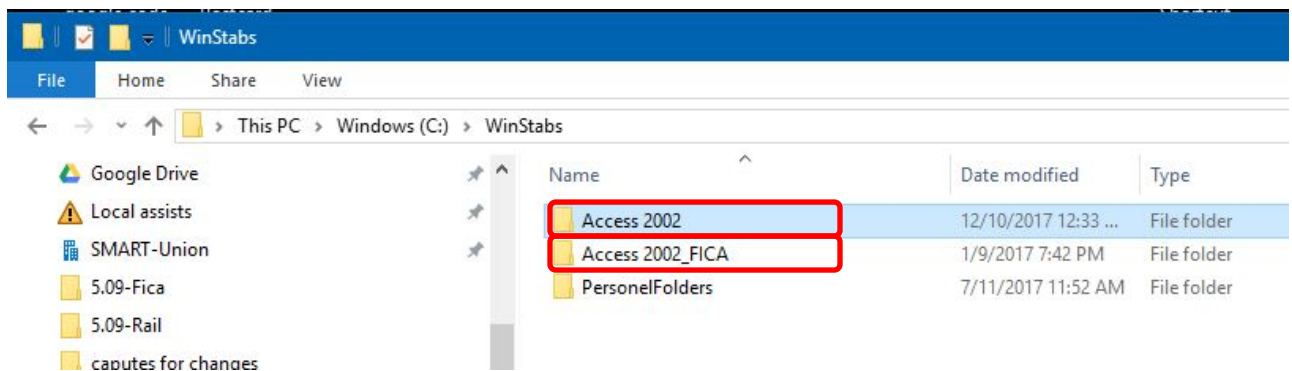
10. Click the yellow folder on the bottom task bar, main side bar, or icon on your desktop.
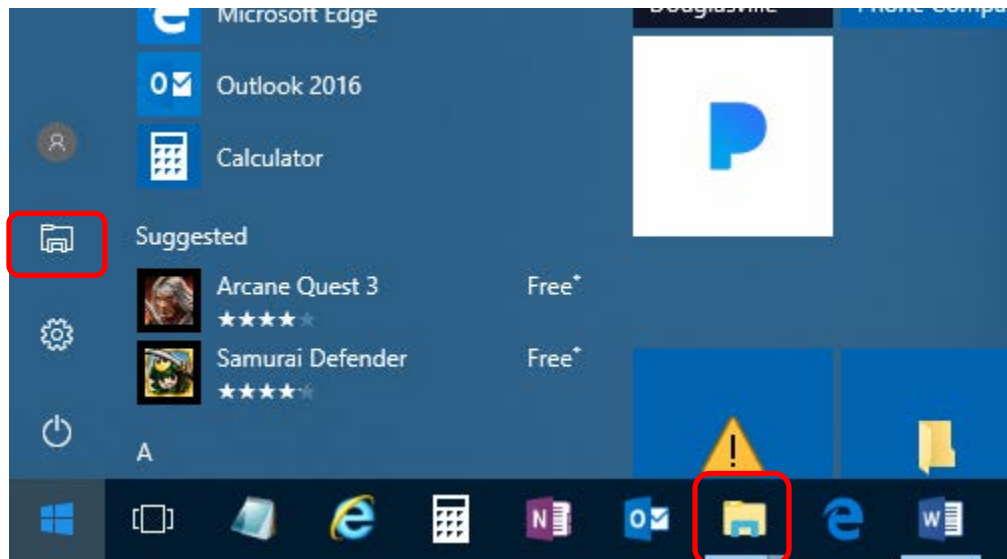
11. Windows Explorer will open on your screen. Click the triangle beside "This PC" - click on " (C:)" – double click yellow folder named "WinStabs".
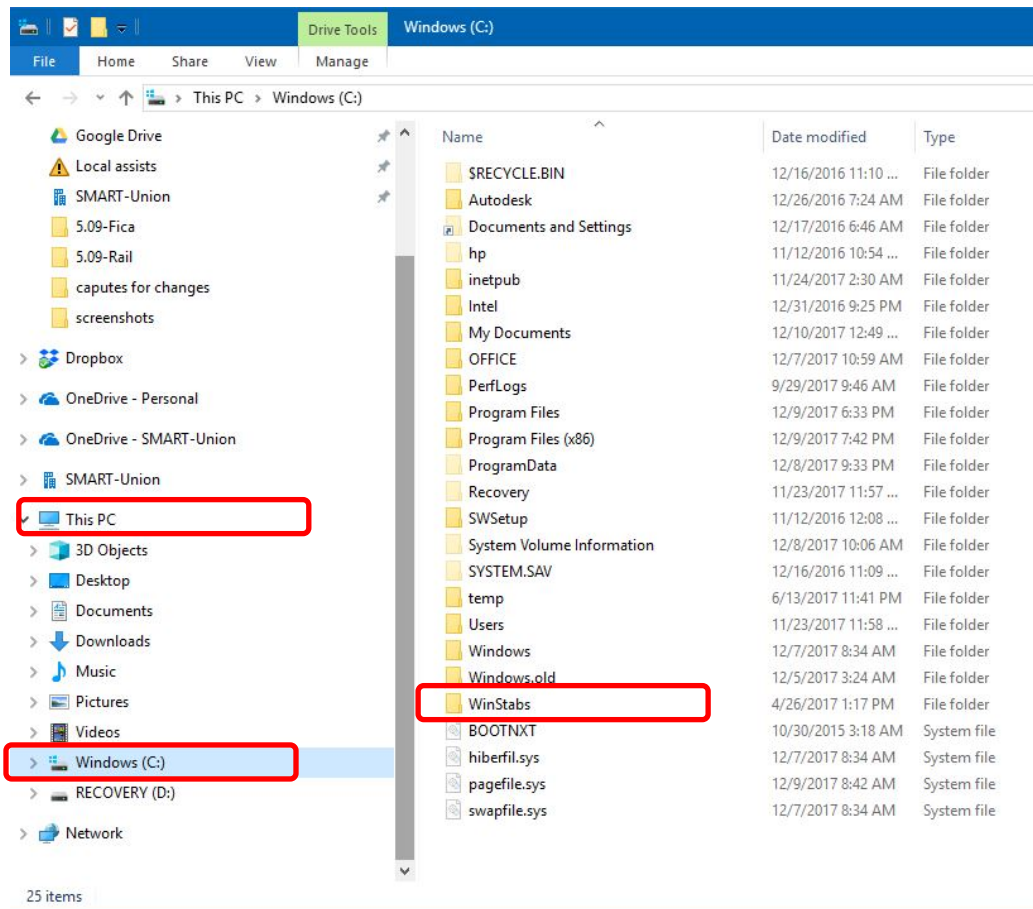

12. Double click the yellow folder named "Access 2002" or "Access 2002_FICA" (if you are a Bus/Air Local).

13. You will see a list of yellow folders with various names that are formatted (YYYY-MM-DD) as dates. The important thing to remember is you want the most current one. In this case you want to double click the yellow folder named "2018-01-01". Double click on this folder.
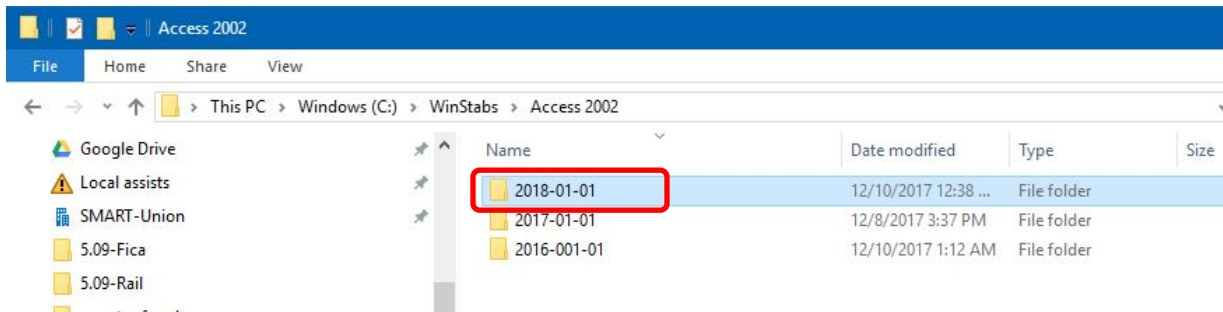

14. You will then see another list of files. Two of the files will have red key icons. These are the two new blank databases that you just installed. Use one of them for your new database. The other one can be used for other years if necessary.
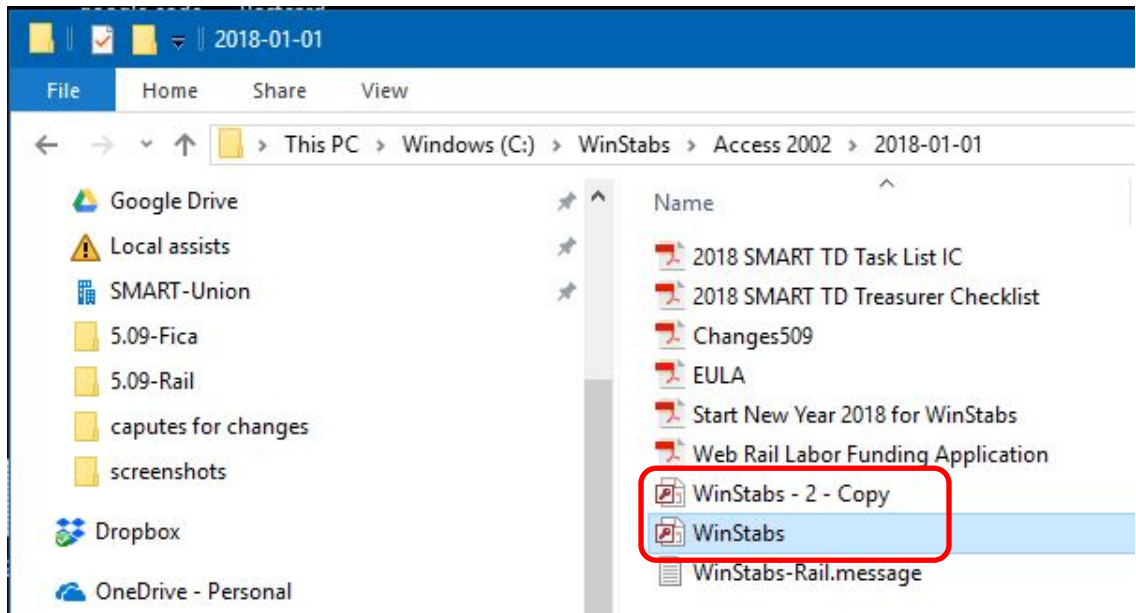
15. Set your mouse on the red key named "WinStabs". Click your right mouse button and a "Drop-Down Menu" appears on the screen. Click "Rename" and the red key name will become highlighted so you can change the name of the file.
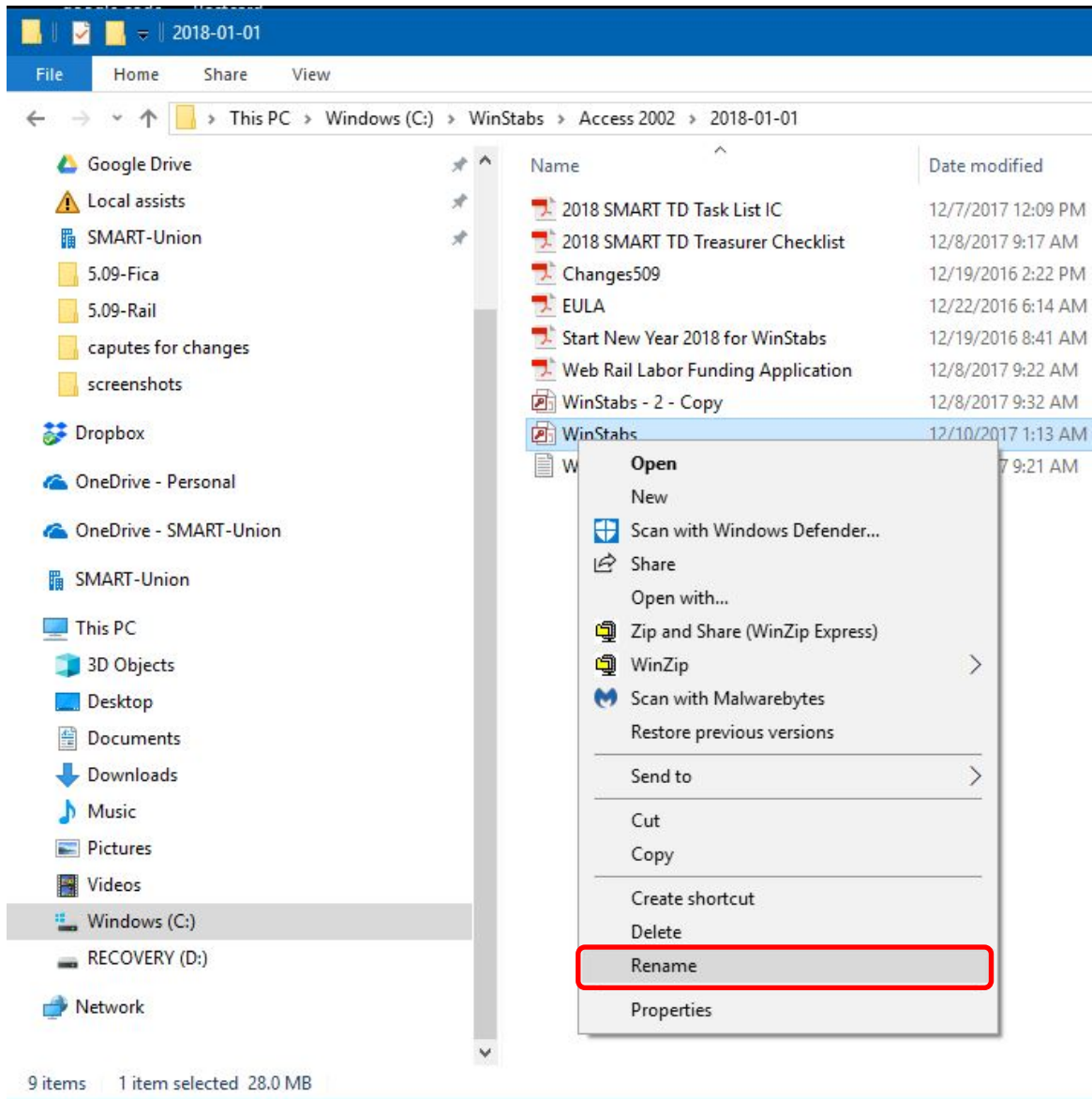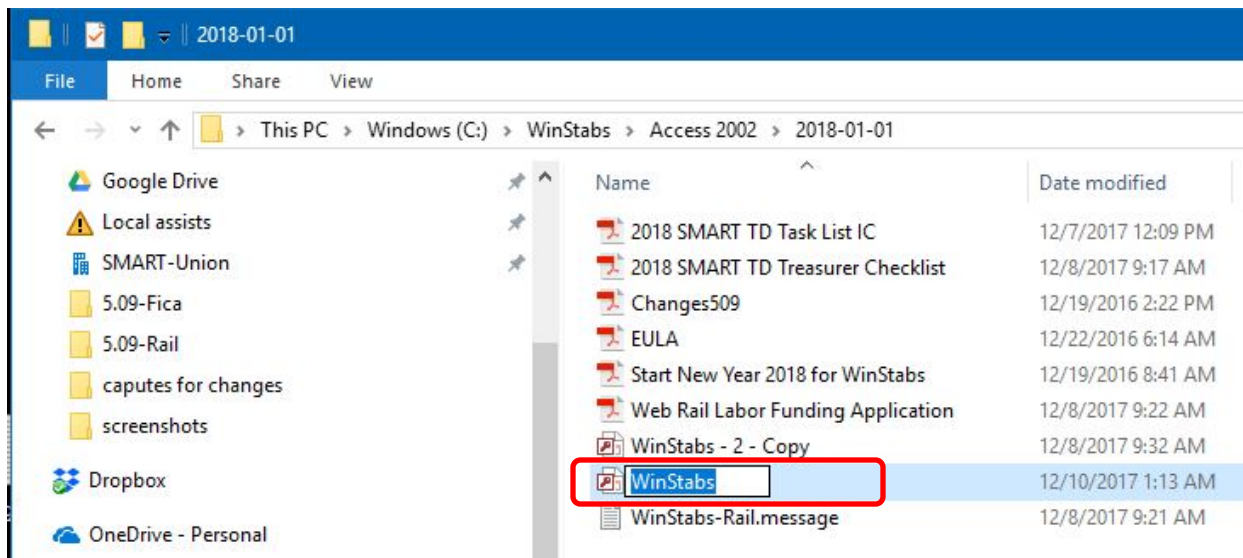
16. Click in front of the file name "WinStabs" then type the year you are creating followed by a space (in this example type "2018") then tap your "Enter" key on your keyboard and the file name will change to "2018 WinStabs".
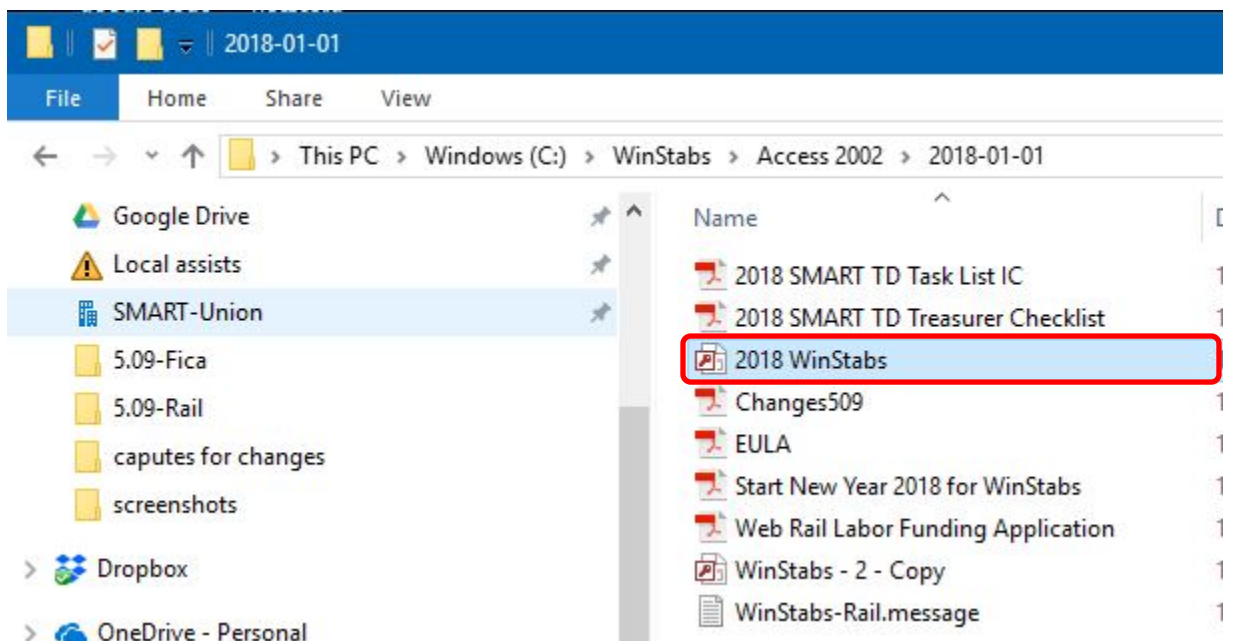
17. Set your mouse on the red key named "2018 WinStabs". Click your right mouse button and a "Drop-Down Menu" appears on the screen. Click "Send To" and another "Drop-Down Menu" appears on your screen. Click "Desktop (create shortcut)". This will place a new shortcut to your new WinStabs program on your desktop that looks like the one on the right. Close Window Explorer down.
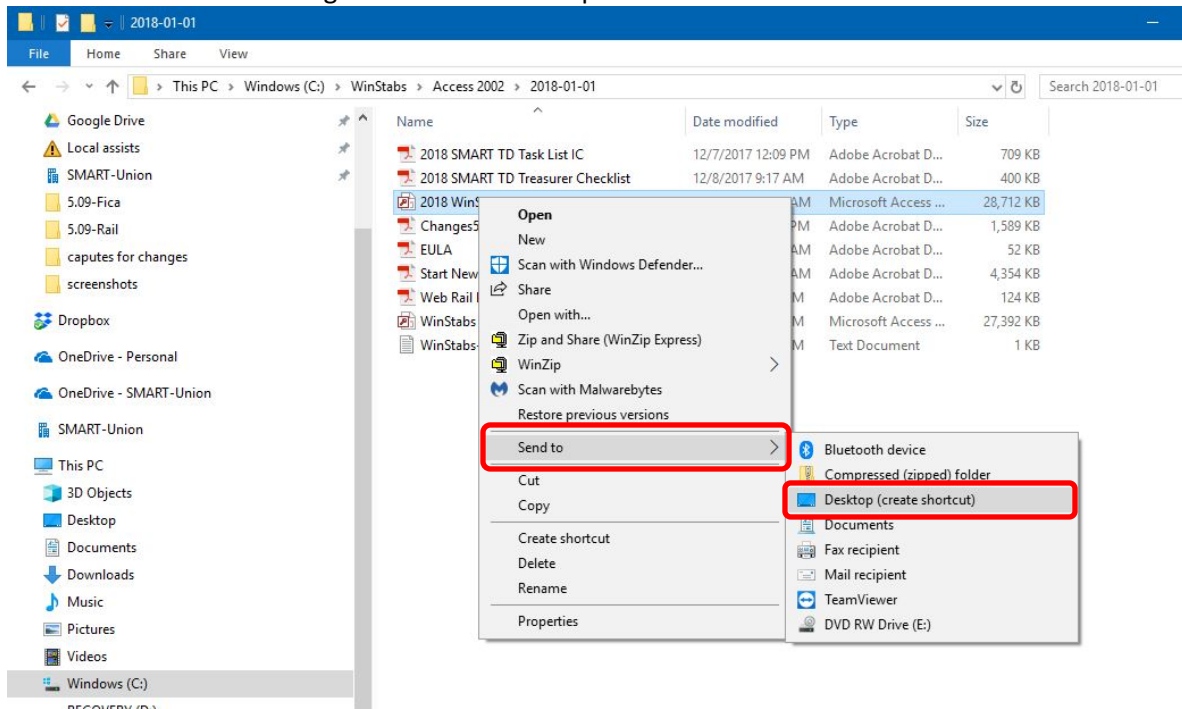
18. Double click the new "2018 WinStabs" icon and it will open. Once opened it should look like this picture. Verify that it says "Treasurer BLANK DATABASE" and Version 5.09.
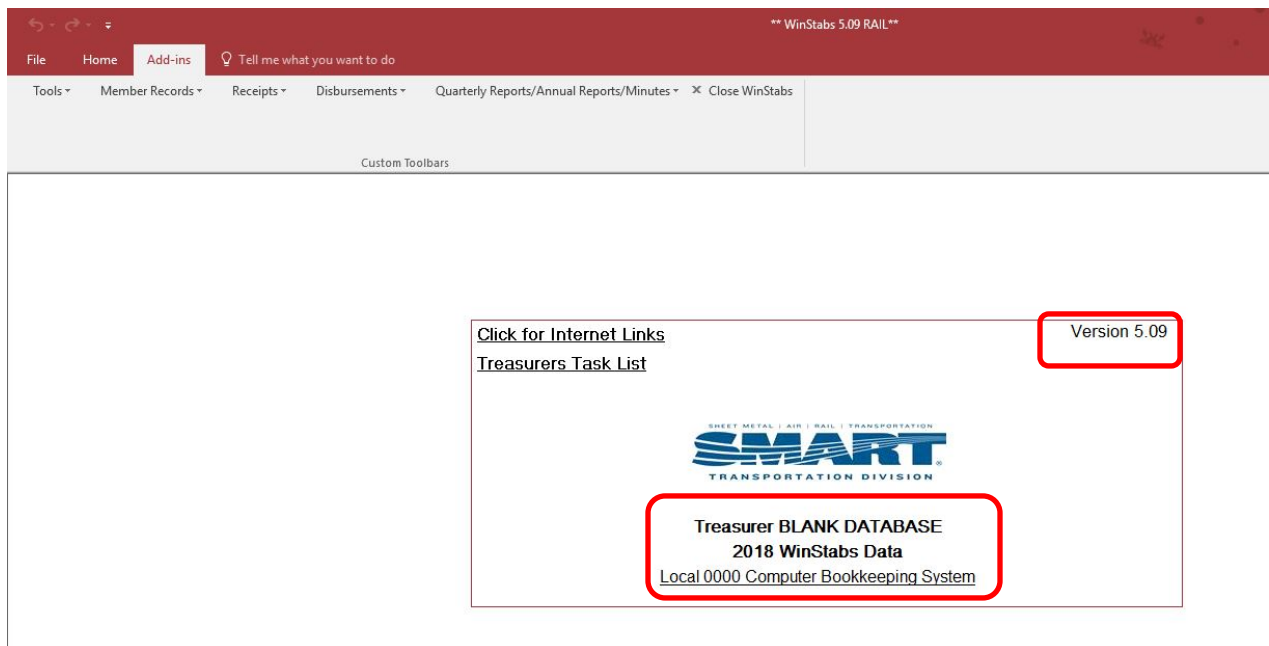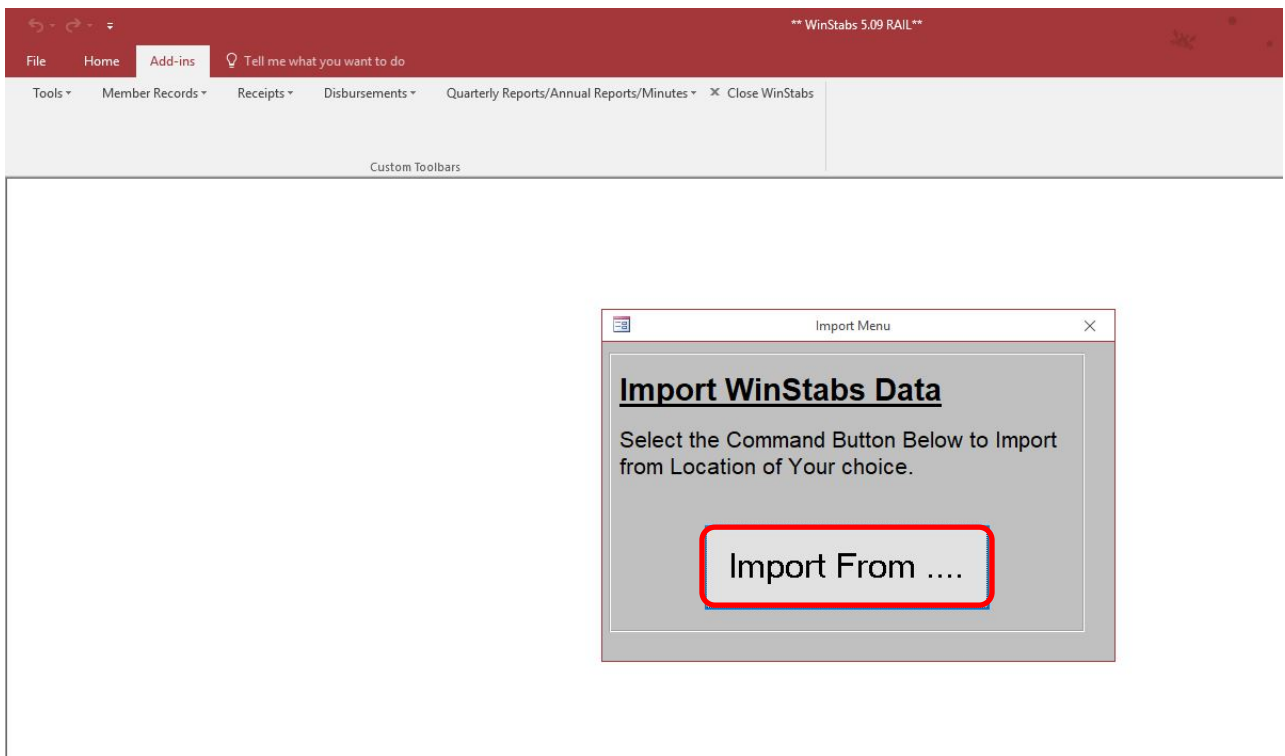
19. Click on "Tools". Roll your mouse down to "Backup Utilities Menu". Click "[Import] Restore Backup Data from Storage".
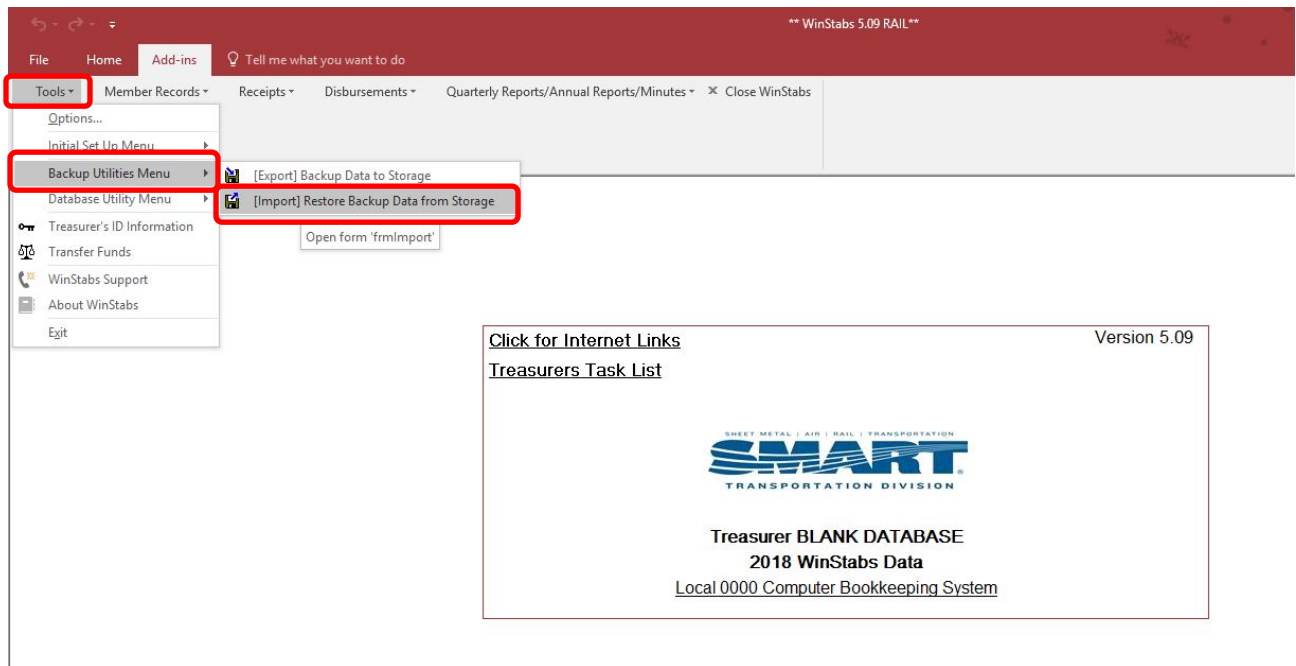

20. This "Warning" appears on the screen. After reading it click "OK".

21. Click "Import From"

22. In the "Browse for Folder" menu scroll down to the bottom of the list and you should see your latest backup of your current data you made previously. If you see more than one yellow folder named "WData2017_L????_2017…" set your mouse on the yellow folder with the latest date & time as part of the file name. It will highlight then click "OK" several times as WinStabs goes through the "Import" process.
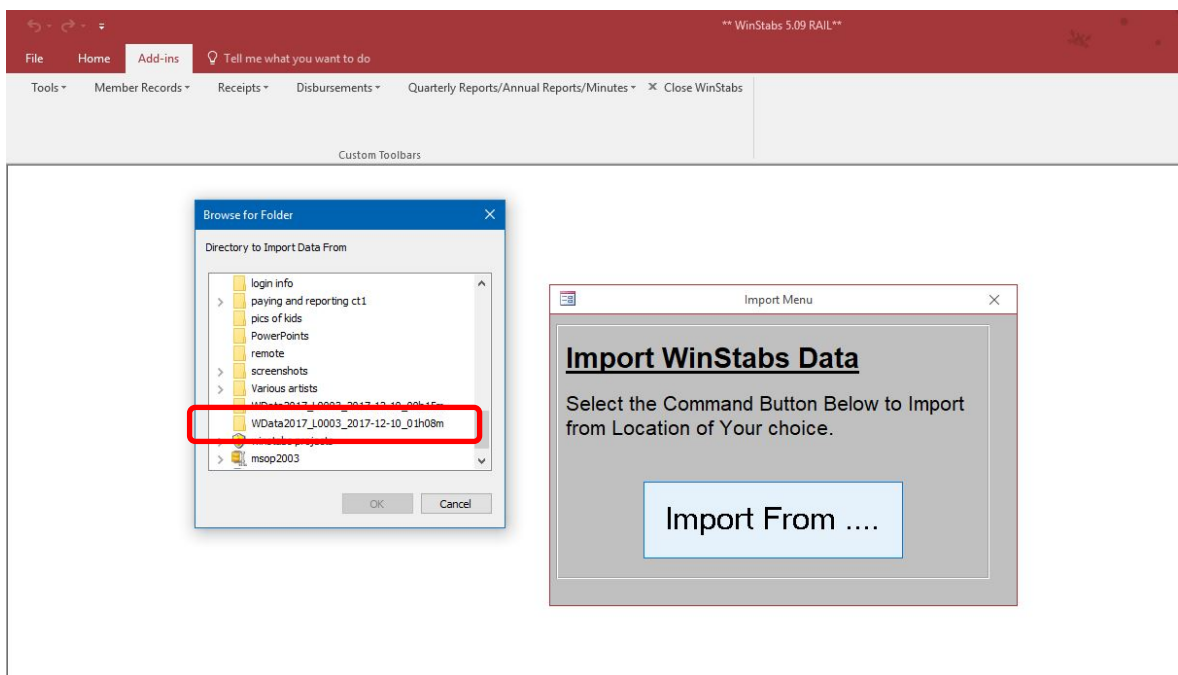
23. Once the "Import" process is finished your screen should look like the one below with your name, Local # and the year you are updating.
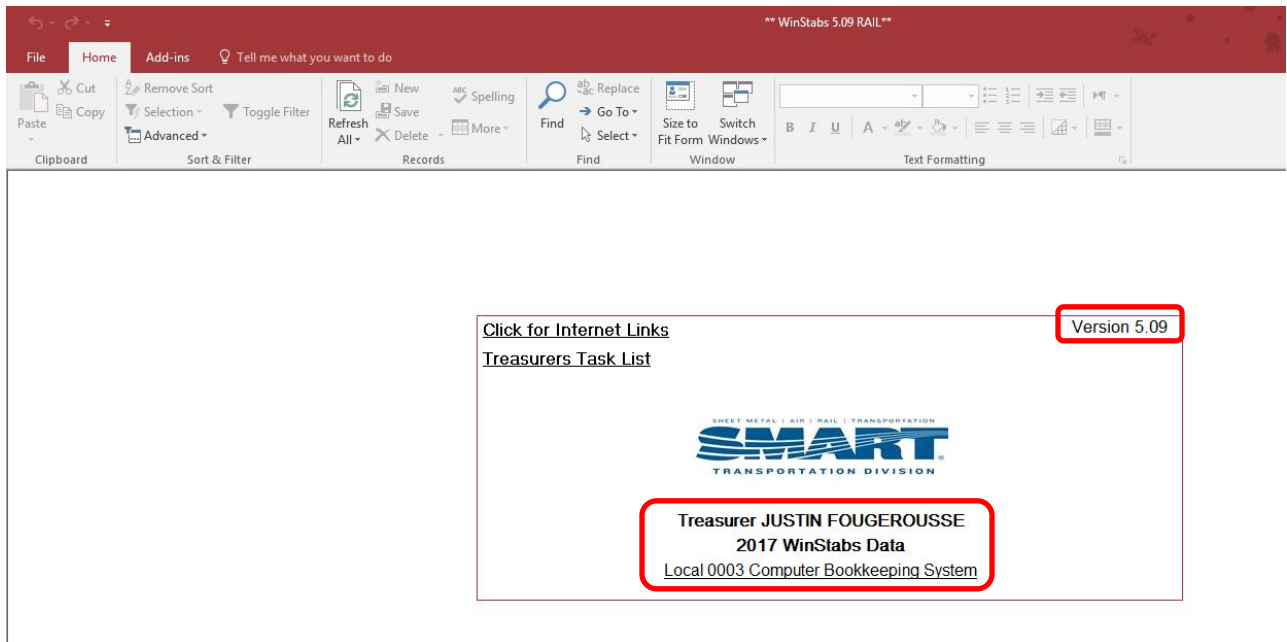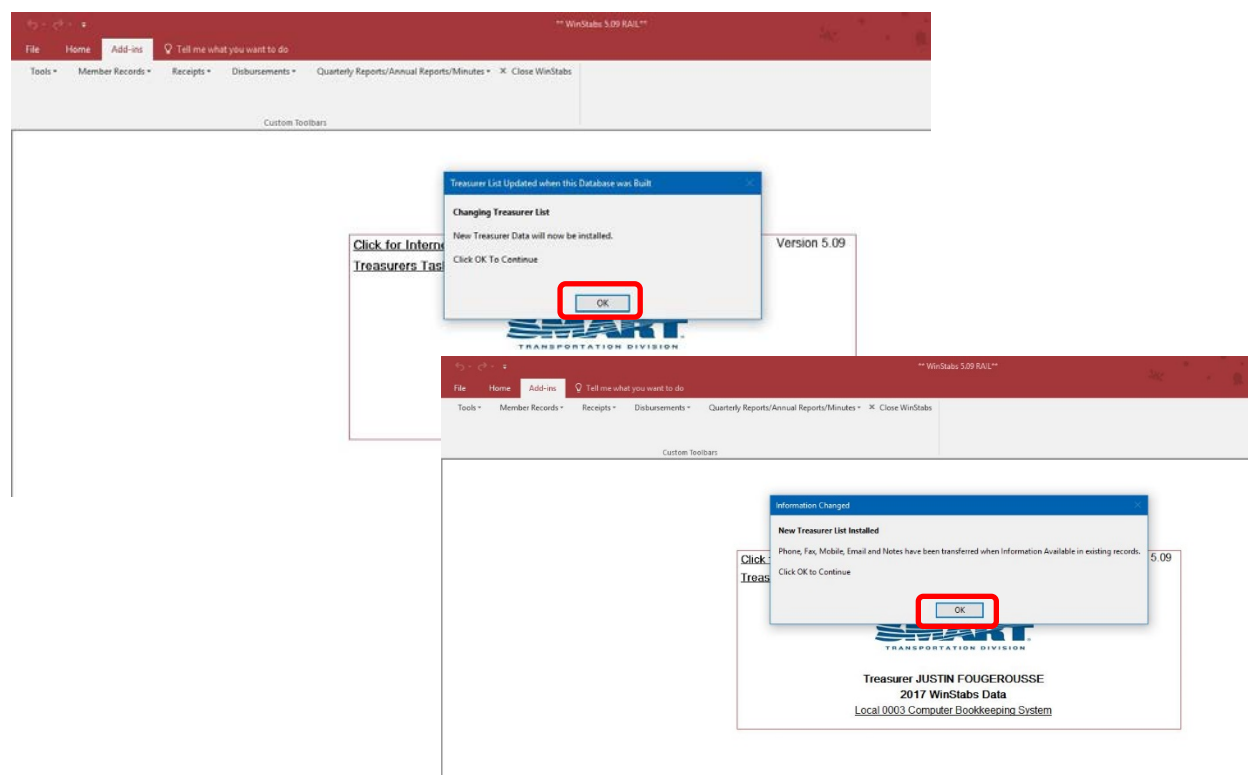

24. Click "Tools". Roll your mouse down to "Database Utility Menu" then click "Write Generic Task List". Then Click "YES" on the warning screen.
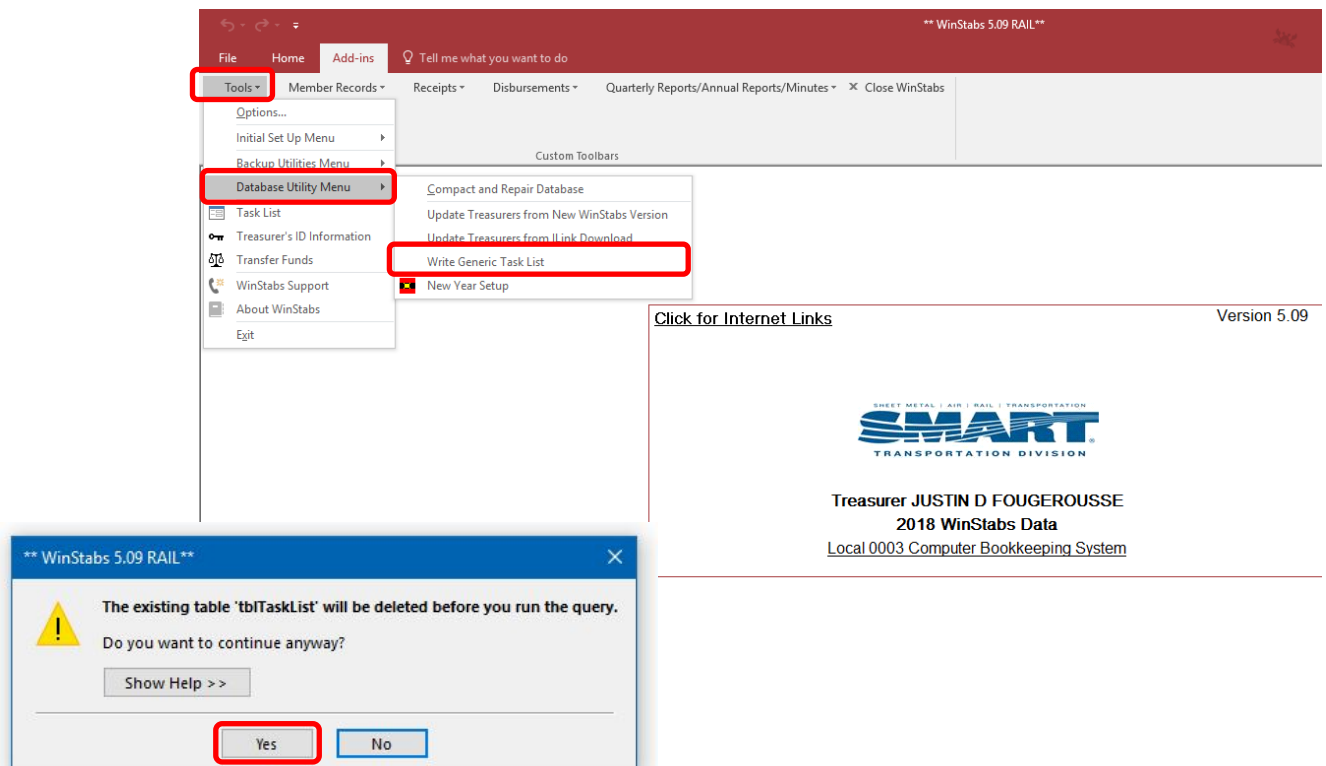
26. Click "Tools". Roll your mouse down to "Database Utility Menu" then click "Update Treasurers from New Winstabs Version".
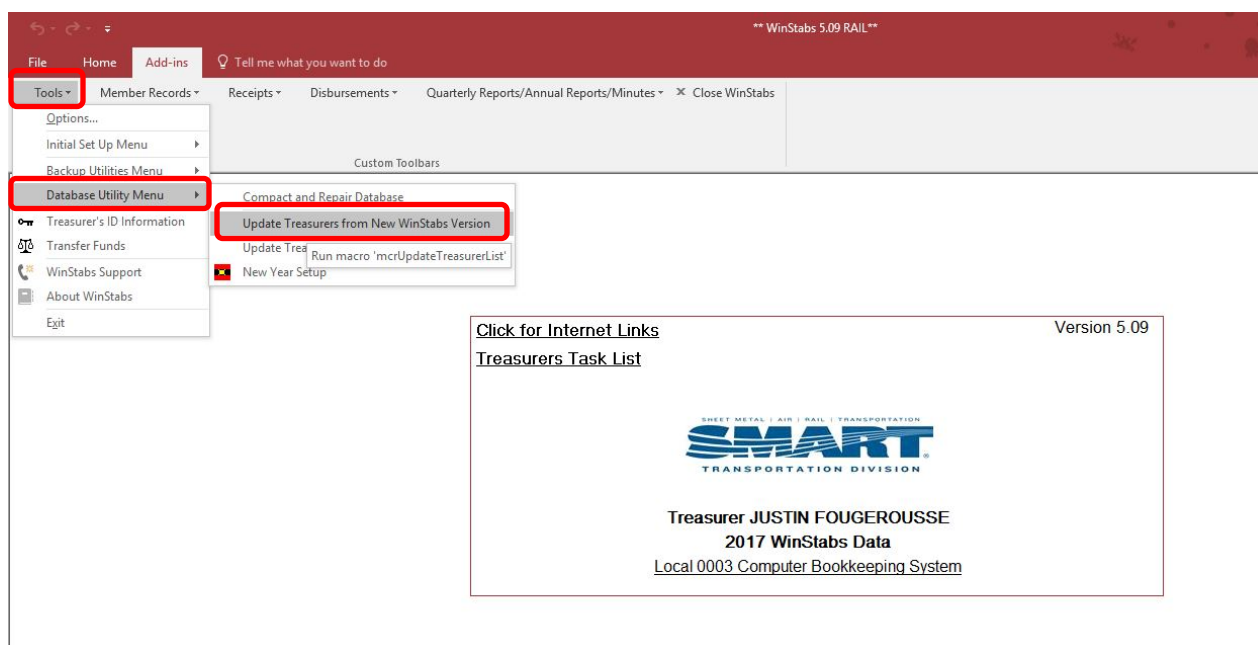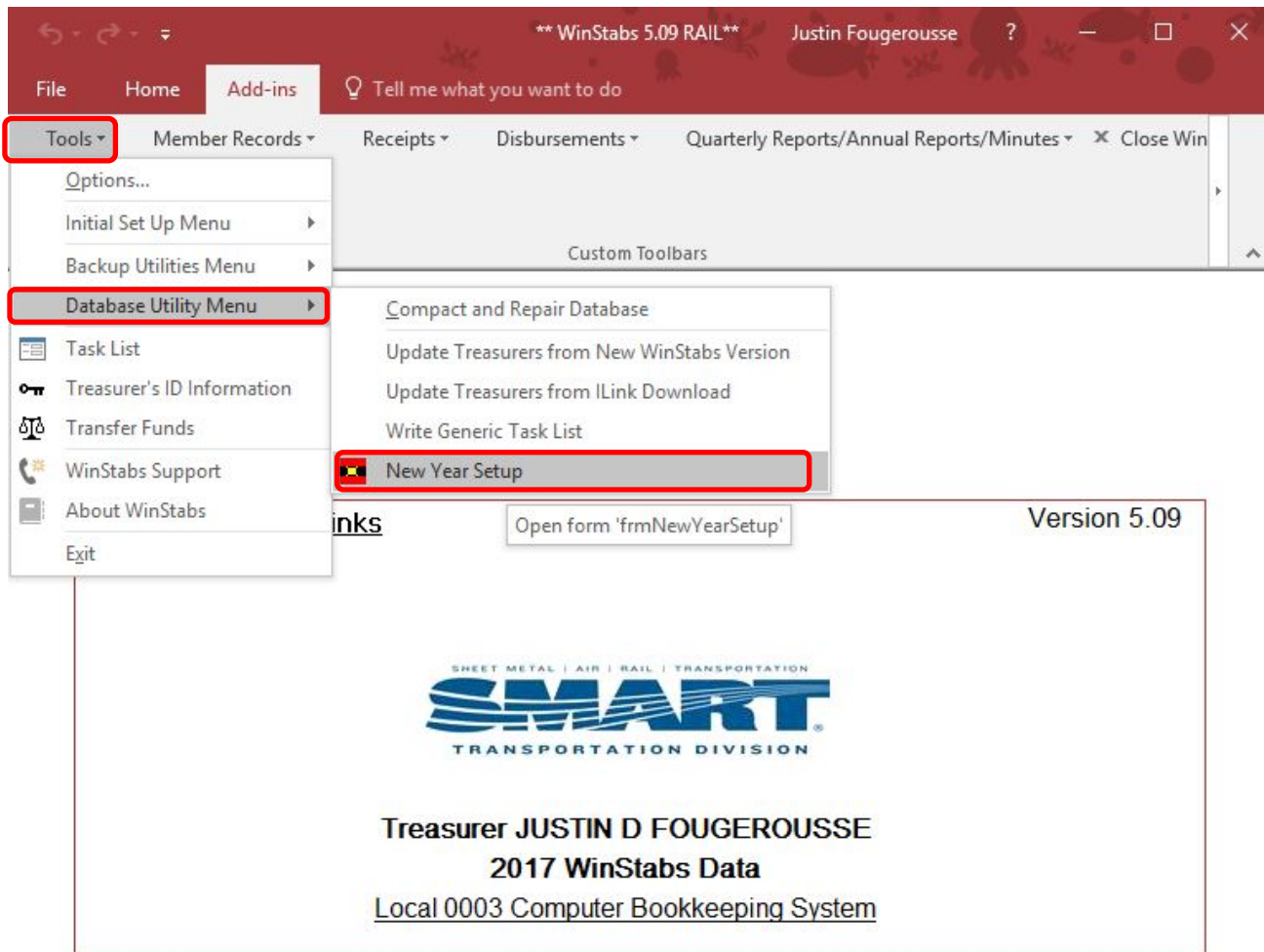

27. Click "OK" two different times as WinStabs goes through the process.

Once the new Treasurer List is installed, make a backup of your new data to your backup drive so that you will not have to do this entire process over again if your computer crashes.

28. Click "Tools" on the tool bar. Roll your mouse down to "Database Utility Menu" then click on "New Year Setup".
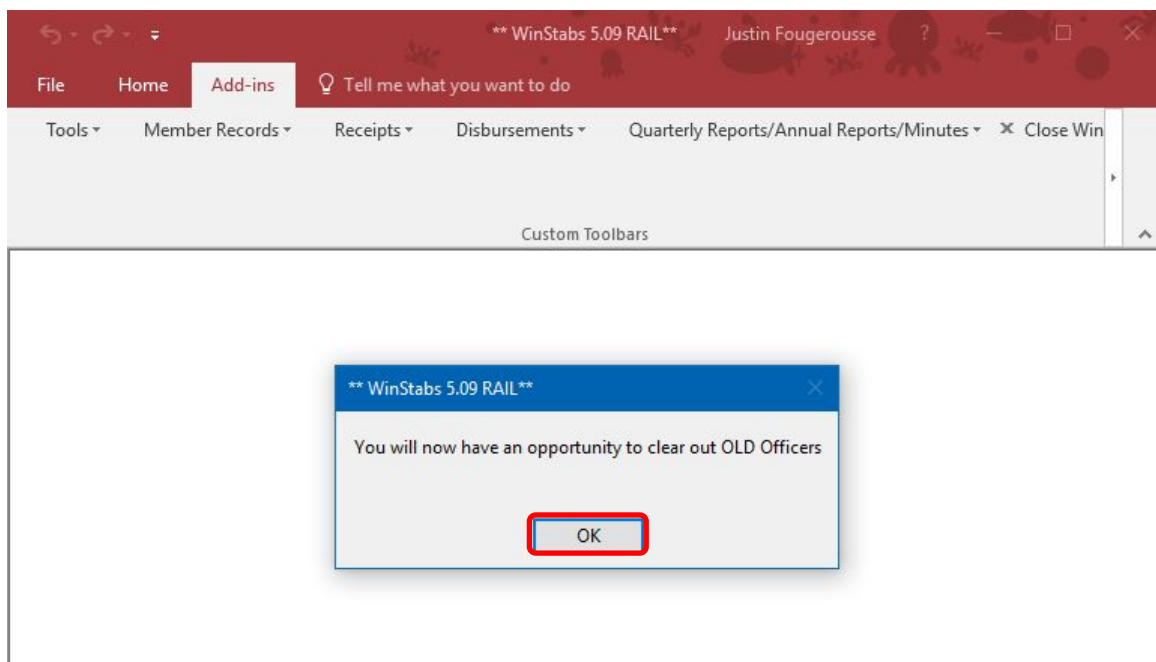
29. The next screen opens. Read all the warnings and when you are ready to continue click the "Setup for New Year" button at the bottom of the screen.
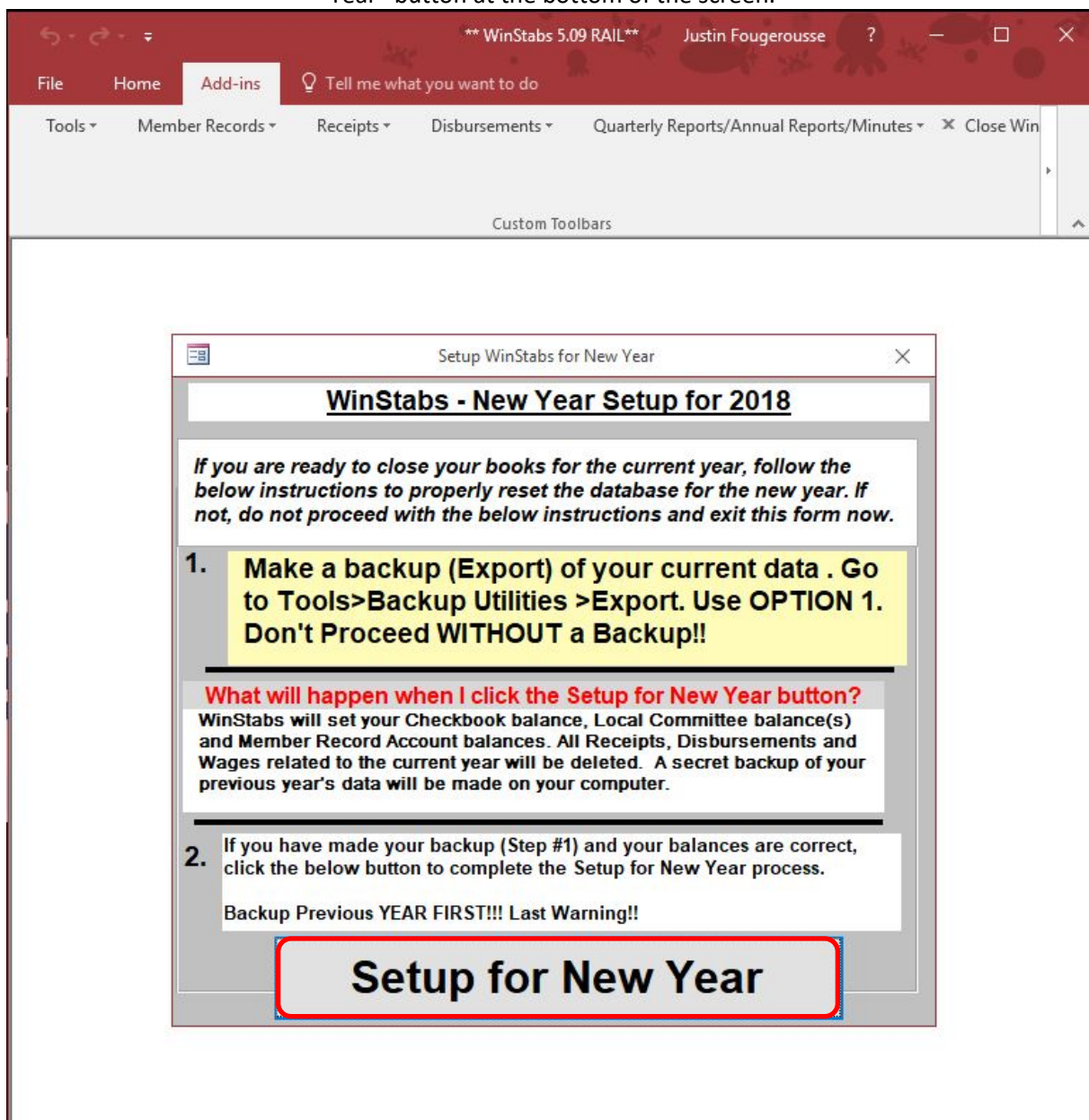
30. Once the New Year Setup process is finished you will have a chance to clear out the old officers who are no longer in office or have changed positions. Click "OK".



31. Review the list of officers and committee persons. If the person is no longer an officer or committee person for 2017 click on the "Clear Fields" button and their classifications will disappear. If you need to change one of their positions, click on the arrow beside their position and pick the correct position from the "Drop Down List". **It's not required that you have anything in the "Rail/FICA" field selected, but everyone must have either a title or other title.** If there isn't a proper description in the other title field, you can type in a short description yourself (Chaplin, Guard, Teller, etc.). When you are finished cleaning up the list click the "Close" button.

CLEAR ALL WHO ARE NOT OFFICERS OR NOT ON PAYROLL FOR NEW YEAR

Close

Status	LastName	FirstName		Officers		Other Titles		Rail/FICA		LCA
ACTIVE	ALLEN JR	RODNEY	Clear Fields	SEC & TREAS	∨		∨	RAIL	∨	887A
ACTIVE	BURGERROOT	JUSTIN	Clear Fields	PRESIDENT	∨		∨	RAIL	∨	887A
ACTIVE	BUSH	DENNIS	Clear Fields	TRUSTEE	∨		∨		∨	887B
ACTIVE	COWEN	MALCOLM	Clear Fields		∨	LOCAL CHAIRMAN	∨	RAIL	∨	887A
ACTIVE	CURRY	VANTREASE	Clear Fields		∨	LEGIS REP	∨	RAIL	∨	887B
ACTIVE	FRETTY	DANIEL	Clear Fields	VICE PRES	∨	LOCAL CHAIRMAN	∨	RAIL	∨	887B
ACTIVE	HAUSER	WILLIAM	Clear Fields	TRUSTEE	∨		∨		∨	887B
ACTIVE	HERB	MATT	Clear Fields		∨	ALT DELEGATE	∨	RAIL	∨	887B
ACTIVE	HOLBROOK	TIMOTHY	Clear Fields		∨	VICE LC	∨		∨	887A
ACTIVE	MONTIER	WILLIAM	Clear Fields	TRUSTEE	∨		∨		∨	887B

32. Enter the "International Dues Rate" effective January 1, 2018. You should have received a letter from the Transportation Division but if you did not you can Check iLink under "Dues Summary Report" (after January 1, 2018) or email Dora Wolf with your inquiry at Dwolf@smart-union.org. When you enter the dues rate DO NOT use a "$".
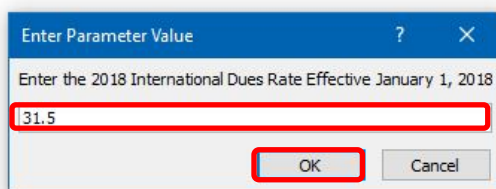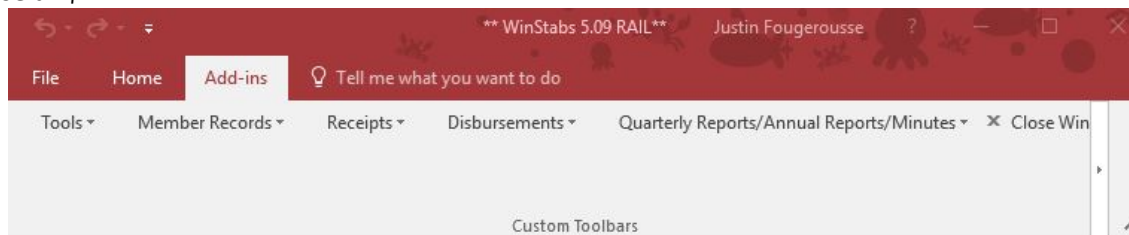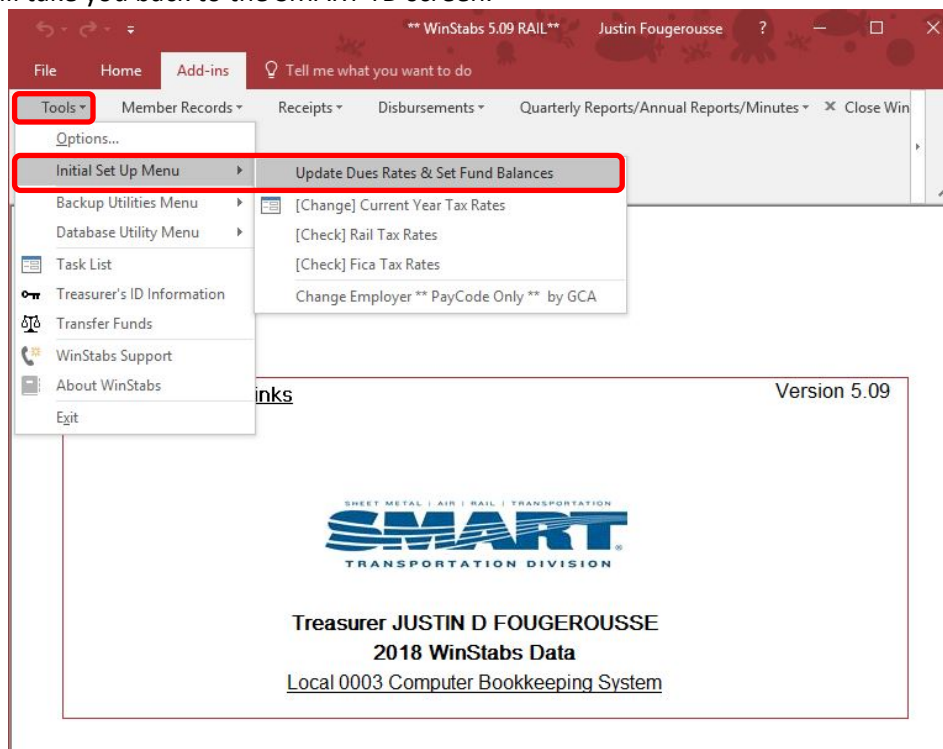

33. Click "OK" on multiple message's and WinStabs will be setup for 2018! If December 2017 billing was completed prior to this process then January dues are posted, the new International Dues rate has been recalculated, and all of your prior member status' have carried over!

34. All ledgers are now set to "Zero" and your screen should show 2018 WinStabs Data.
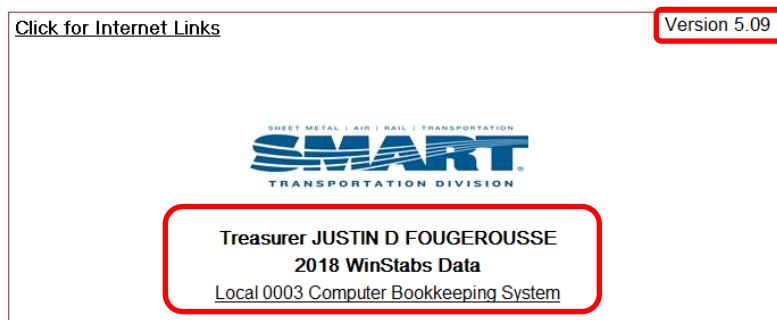
35. All Fund Ending Balances (Local Fund & all LCA Fund Balances) for 2017 have been brought forward into 2018 as beginning balances. **If you have not finished closing out 2017 books, you will need to verify these balances after completing your TAR for 2017.** If the Ending Balances on Page 3 of your 2017 TAR do not match the Beginning Balances in your 2018 WinStabs you need to make the proper changes. To verify these balances, click Tools > Initial Set Up Menu > Update Dues Rates & Set Fund Balances > Fund Balances & Setting Rates. If any of them need changing, make the corrections and then click the "Close" button. WinStabs will take you back to the SMART TD screen.

36. Click on Tools – Initial Setup Menu – [Change] Current Year Tax Rate. Verify that the correct rates are showing on the screen. Click "Close & Save" button.
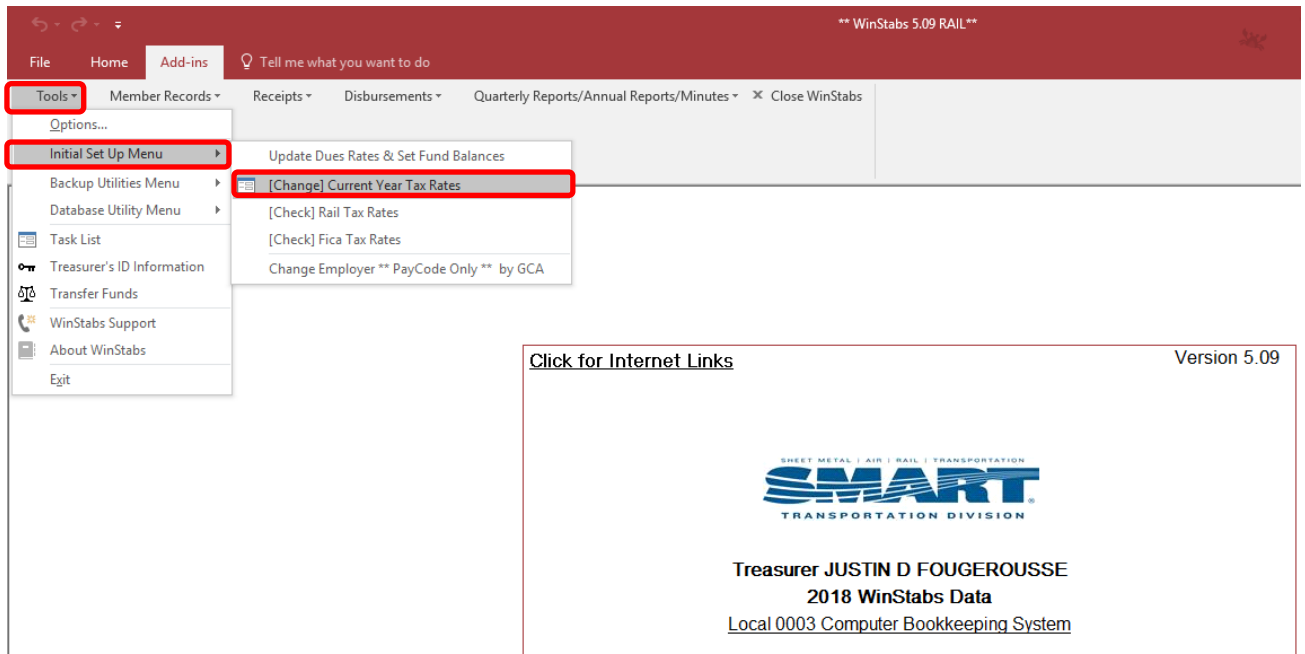
37. Be sure to setup **any new officer or committee person's** classification on their "Members Record". If this person will ever be paid a wage, lost time or reimbursed expense you must setup their "Wage File" also. Click "Members Records" – "View all Members Records".
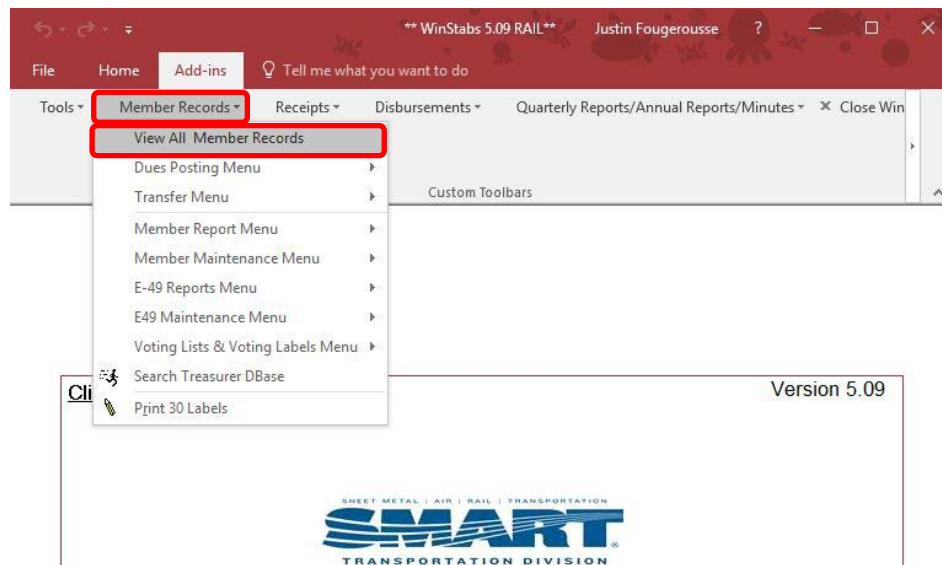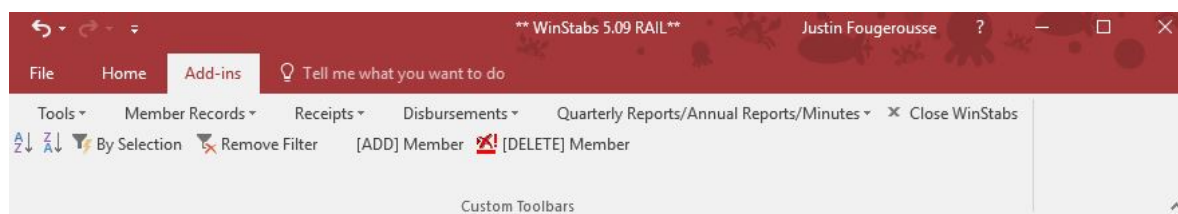

38. Click in the "Search for all Members" box and start typing their last name. Once their name appears in the search box tap the "Enter Key" on your keyboard and their "Members Record" will appear. Setup their Position and "Wage" (RAIL or FICA) if applicable.

39. Setup their Federal, State & Local Withholding Tax Rates if applicable. Click "Tools/Reports" tab then enter the applicable tax rates. Close the "Members Records" down when finished classifying all new officers and committee persons.

Make a backup of your new 2018 data to your backup drive so that you will not have to do this entire process over again if your computer crashes.

Your new WinStabs 5.09 is installed and setup for 2018!