

Starting and Exiting *WinCap*

Starting/Logging-on to *WinCap*

To start *WinCap*:

A *WinCap* icon should be located on the desktop. Double-click on the *WinCap* icon.



The following Logon prompt will appear to confirm the connection to the *WinCap* Application.

Enter the *WinCap* User Name and Password that you have been assigned by the System Manager. (Sheri Kershner)



Users may also change their password anytime they wish. To initiate this change, first enter your User Name and your current password; then right-click on the OK button.



Enter your new password, and then enter it again to confirm that it was entered correctly.

You will receive the following prompt if the password was changed successfully. Otherwise, you will receive a prompt to indicate the reason it was not changed.



Passwords must be at least four characters in length and must begin with a letter. They may contain letters, numbers, spaces and punctuation characters (.,:;?!- _).

If you have forgotten your password please email or call Sheri Kershner. (433-2613 or skershne@ocmboces.org)

Exiting/Logging-off WinCap

WinCap runs on its own Application Server that is separate from the Local Area Network server. Logging off the LAN does not log the user off the *WinCap* server. It is very important to log off the *WinCap* server, not disconnect from it. Disconnecting a session closes the connection between the server and the PC workstation (client), but it does not log the user off. Any processes that are open or running when a user disconnects will remain open or running. This could interfere with other users trying to use *WinCap* or potentially create problems. Therefore, **it is extremely important to exit the application correctly**. If there is a concern that *WinCap* was not exited properly, contact Sheri Kershner immediately.

To exit the *WinCap* application and log-off the server.

Using your mouse:

- 1) Choose File from the *WinCap* menu bar.
- 2) Choose Exit.



The following message box will appear to confirm that the log-off from *WinCap* and the Application Server is being done properly.



If you attempt to exit *WinCap* and receive the following message, do not select OK. Instead, select Cancel and try again to log off *WinCap* again. If the problem persists call Sheri Kershner.



General Navigation and Data Maintenance Functions

There are two basic means for accessing the features available within *WinCap*:

- 1) Through the Menu Bar the submenus/options presented underneath it.
- 2) Through Toolbars that allow for the selection of specific features and options by clicking on icons representing the available options.

Menu Bar

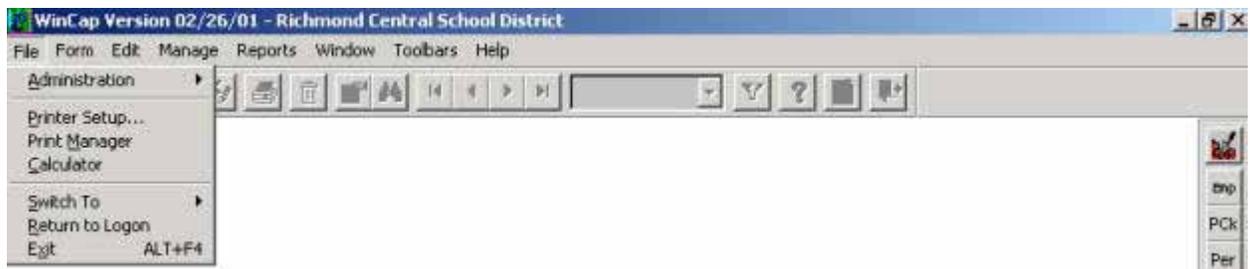


The *WinCap* Menu Bar functions are similar to those found in other Microsoft Windows® based applications. Users can select the appropriate options they need from this menu.

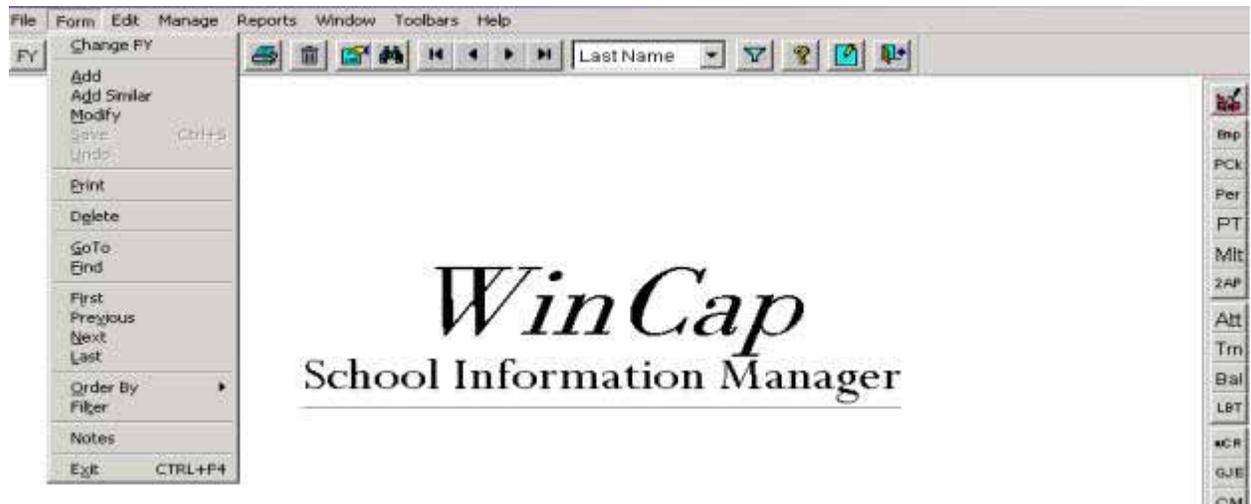
Main Menu options are selected by clicking on the option with the mouse, or by pressing the Alt key and typing the letter that is underlined in the name of the option.

Submenu options are selected by clicking on the option, or by typing the letter that is underlined in the name of the option.

The **File** menu is used to access administrative functions within *WinCap* and for overall system operation.



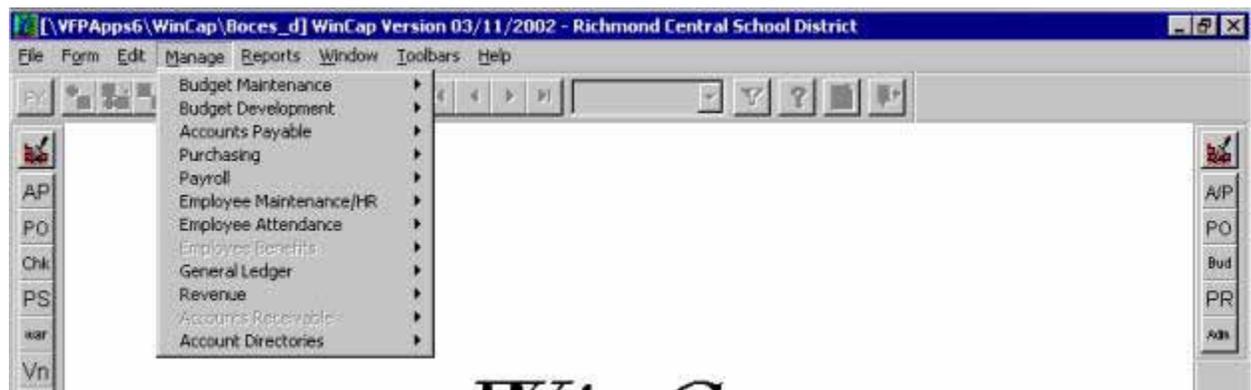
The **Form** menu provides choices specific to the active form window. They deal with record maintenance and with navigation among the records accessed through the specific form.



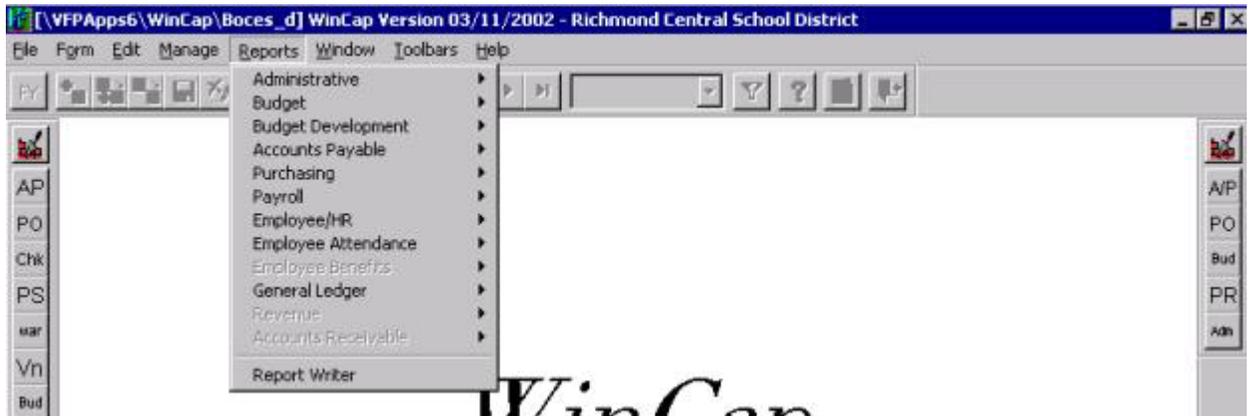
The **Edit** menu provides options for action that can be taken on a field within a form or for a list that is presented to select from. These options perform the same functions they do within other windows applications.



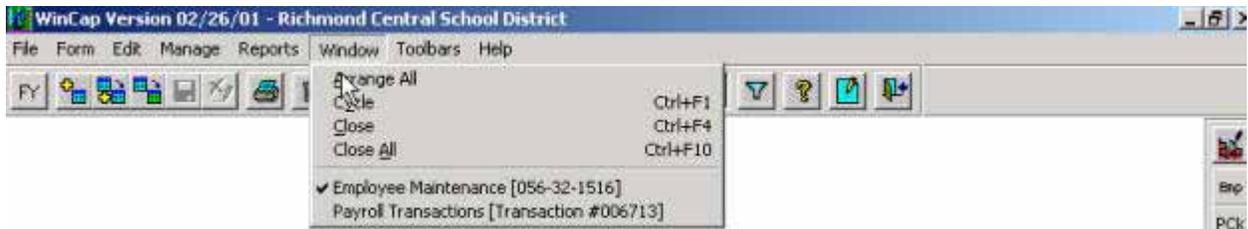
The **Manage** menu is the primary menu for accessing the options for maintaining and processing data within the specific functional components of the WinCap Accounting, Payroll and Human Resource Management systems.



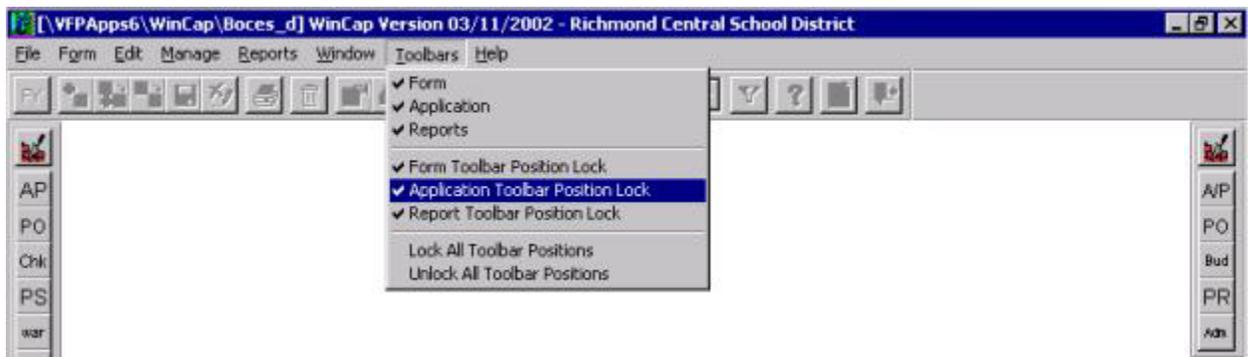
The **Report** menu is the primary menu for accessing the reporting options available within the specific functional components of the *WinCap* Accounting, Payroll and Human Resource Management systems.



The **Window** menu provides options to assist the user in managing the form windows that are open within *WinCap* at any particular time. In addition to the four standard options that are listed on this menu, the user can also find a list of all the *WinCap* forms that are currently open at the bottom of this menu. The check mark denotes the active form. Selecting another window from the list will select that form as the active form window.



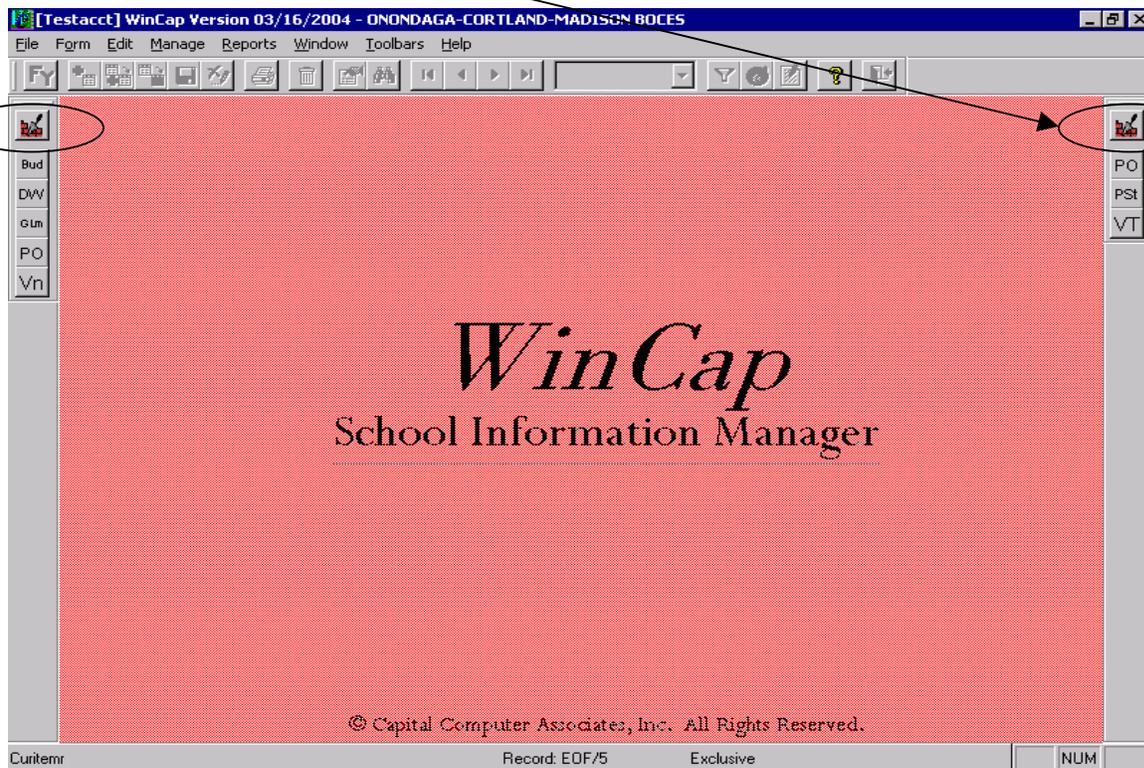
The **Toolbars** menu is used to activate or hide the toolbars available within *WinCap*. These options function as toggles. When there is a checkmark next to the option, the specific toolbar will be activated, otherwise it will be hidden.



Toolbars

Toolbars provide a shortcut method to select options available within *WinCap*. Instead of having to click on the Main Menu Bar and the various levels of submenus, desired options can be directly selected by clicking on an icon found on the toolbar. *WinCap* provides three different toolbars:

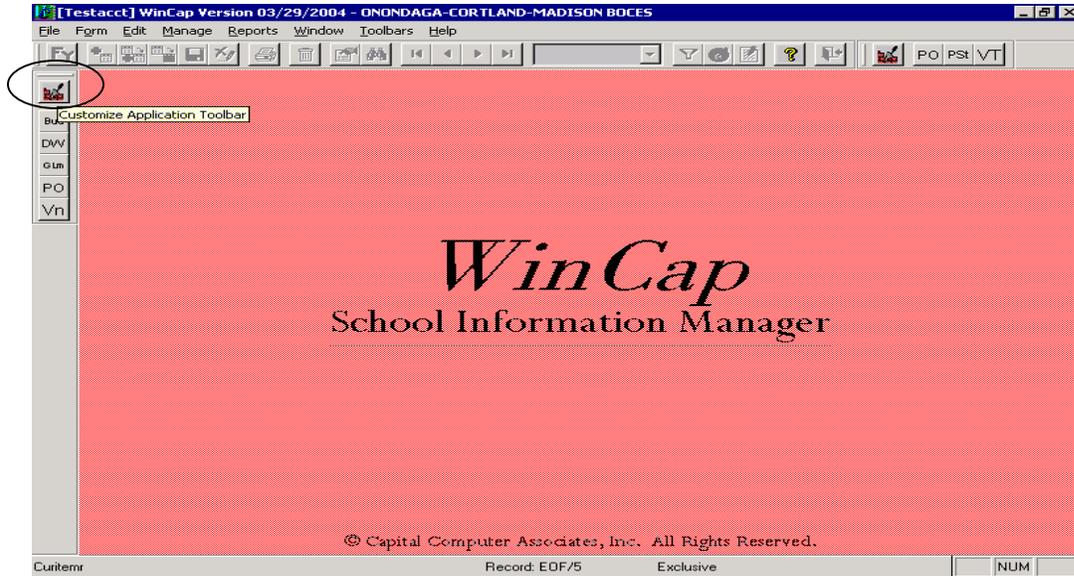
- 1) A system-defined Form Toolbar with icons representing the options found on the Form Menu off the Main Menu Bar
- 2) A user-defined Application Toolbar to select the various data maintenance Forms and processes that the user uses most often. See example A on how to set up the Customize Application Toolbar.
- 3) A user-defined Report Toolbar to select the various reports the user generates most often. See example B on how to set up the Customize Report Toolbar.



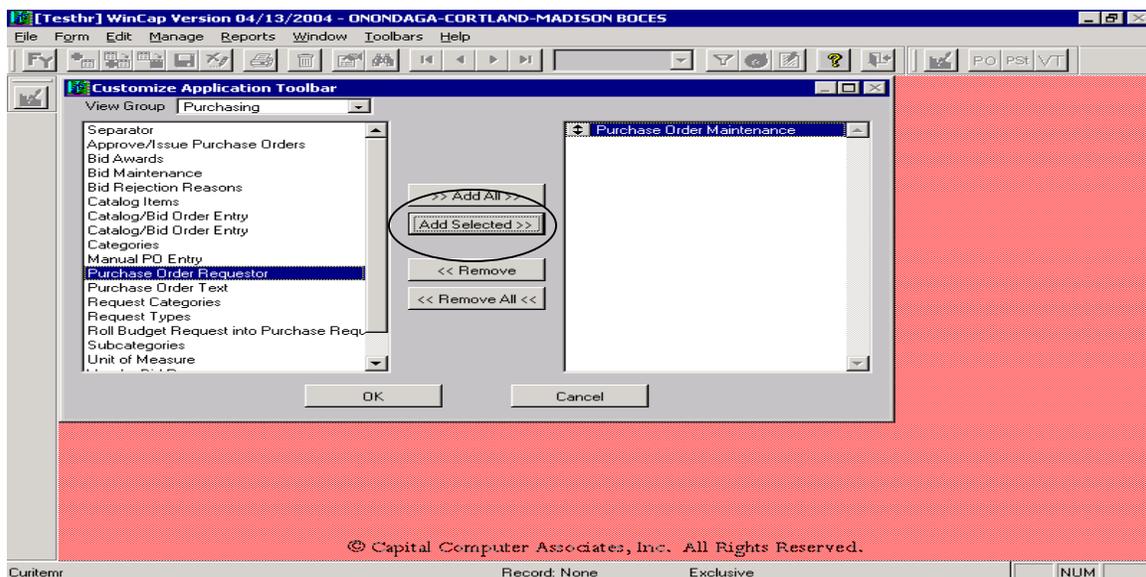
Example A

Setting up the user defined Application Toolbar

Choose the Icon Customize Application Toolbar.

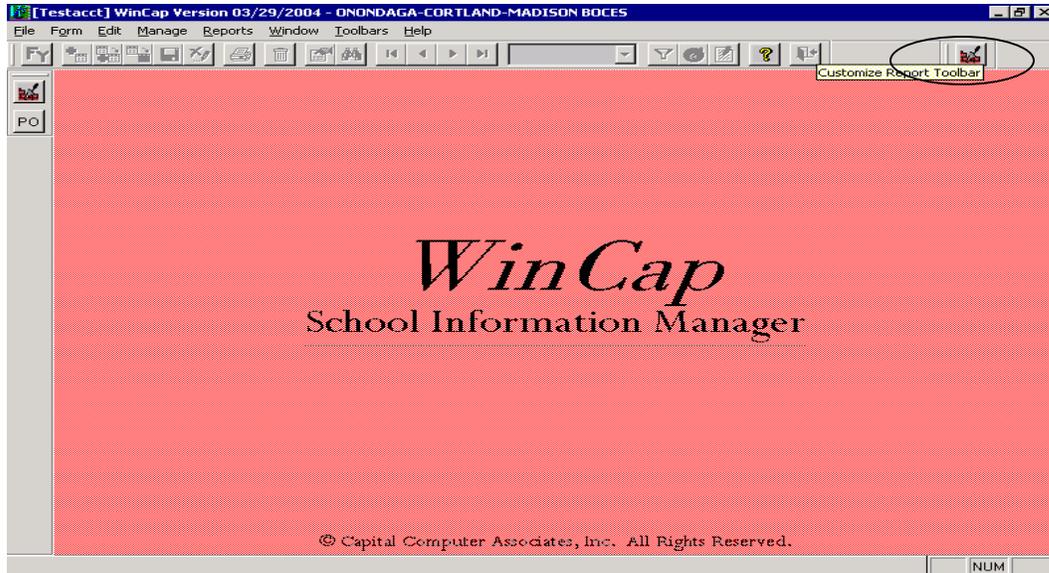


Immediately the Customize Application Toolbar window will open. From the 'View Group' field choose the module then highlight the program function that you want to add to your custom toolbar, choose the Add Selected >> button, the program will then appear in the column on the right side listing all of the programs you have added. To remove any programs from your custom list, highlight the program; choose the <<Remove button. When you are finished choose OK and you will be brought back to the main screen.

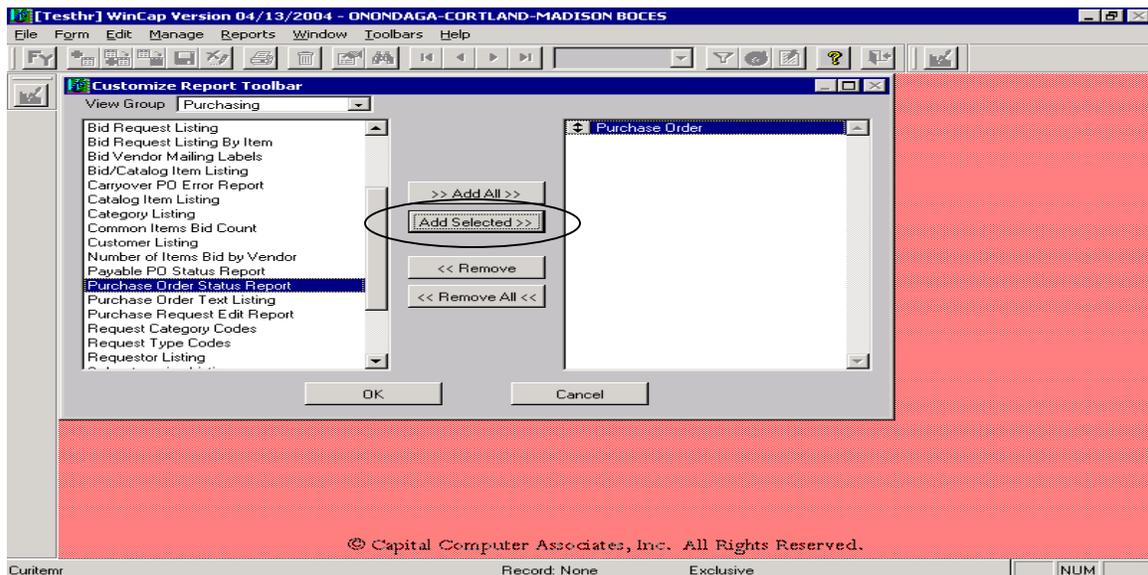


Example B Setting up the user defined Report Toolbar

Choose the Icon Customize Report Toolbar



Immediately the Customize Report Toolbar window will open. From the 'View Group' field choose the module and highlight the report that you want to add to your custom toolbar, choose the Add Selected >> button, the report will then appear in the column on the right side listing all of the reports you have added. To remove any reports from your custom list, highlight the report; choose the <<Remove button. When you are finished choose OK and you will be brought back to the main screen.



Record Maintenance Icons



Fiscal Year – Click on this icon to change the fiscal year associated with the active form window. The default fiscal year can also be set to the specified year by checking the box provided.



Add - Select this option to add a new record based on the active form window.



Add Similar - This option will add a record by initially copying the current record displayed in the active form window. Key fields that must be unique will be blanked out for the new record, so the user or system can assign a different key value for the new record.



Modify – Where permitted; select this option to edit data in the active form.



Save - This option will save, or post, the information entered for a new record or the modifications made to an existing record.



Undo - This option restores data back to the status before the transaction began. For Add, it will re-initialize the form; for Modify it will restore the values of all fields to those last saved.



Print - This option provides a listing of system reports that are available for the function associated with the active form window. For certain forms, this icon will default the printing of a specific report associated with the form, and right-clicking will default the printing of that report for the specific record displayed in the form window. (i.e. for PO Maintenance form, left-clicking this icon brings up the PO printing specification dialog box; right-clicking will automatically specify the printing of the purchase order record displayed.)



Delete – Where permitted, this option will delete the record displayed in the active form window. If conditions exist that restrict the users' ability to delete the record, then an appropriate message will be displayed.

Navigation Icons—Assist the users in accessing and displaying specific record(s)

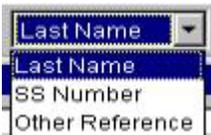


Go To – Provides a prompt to enter the exact value for a record that the user wishes to display in the active form window.



Find – Use this option when the exact id code (PO#, Transaction #, etc) for a record you wish to display is not known. It will provide a list of records in the file those meet specified criteria from which the user can then select the record they wish to display.

Record Order– This combo box allows the user to select the field to use as the basis for ordering the records accessed through the Form.



Record Arrow Icons - Based upon the data order selected, the following icons are used to move through the records accessed through the active Form.



First Record - will access the "First" record in the file.



Previous Record - will access the "Previous" record in the file.



Next Record - will access the "Next" record in the file.



Last Record - will access the "Last" record in the file.



Help - An on-line help feature will be available in the future with a left click on the ICON. Right clicking on the help button shows when the currently displayed record was added and last modified and by what user.



Notes - For most records maintained within *WinCap*, there is a capability of storing a note concerning the specific record. To add a note, the user must be in add, add similar or modify mode. If a note is present, a letter "A" will appear  instead of the plain background.



Exit - This option will close the active form window. If the current record is in the Add or Modify Mode at the time this option is selected, it will present the standard prompt whether to save the changes or not. If cancel is selected, it will return to the active record.

Note: Icons on the Form Toolbar will appear as inactive (pale gray) if the options are inappropriate given the status of the record in the active form window, or if the user's security does not permit them to perform that operation.

Workstation Lock-Ups

Sometimes a workstation may seem locked up when it actually is not. If a workstation does seem hung, do not just turn it off.

Course Of Action: Notify your *WinCap* System Manager (Sheri Kershner). Many times it's just the *WinCap* session that is hung up and can usually be corrected. If a workstation is turned off without shutting down properly, especially if the workstation really isn't hung, the user may not be able to reconnect to *WinCap*. (An extra connection could have been created.) This could end up causing a multitude of disconnected sessions on the *WinCap* server and slow the system down. Also, turning the workstation off without shutting down properly may cause severe damage to the local hard drive.