

Residency 3 - Facilitation Teams **System Setup and Maintenance Routines** ***CapacityWare*TM Software Exercises**

Use the *CapacityWare*TM Library Overview and Index for Book 2 - *CapacityWare*TM Administration Manual references.

1. Registration of *CapacityWare*TM Software ().

Note: ONLY if software is installed and registration is not yet accomplished.

START - At the Main Menu.

>> "Click" on About in the upper right of the Main Menu bar, then select and "click" About CapacityWare on the pull-down menu.

>> Make a note of the 10-character Registration Number. This number will be needed at the time of on-line registration.

>> "Click" OK to return to the Main Menu.

>> In the upper right of the tip menu bar, "click" Visit.

>> At the LTODI.COM site, locate and "click" the CapacityWareTM Software line.

>> At the next menu, "click" on CapacityWare Software Registration - ...

>> The on-line Registration Form appears. As a reason for submission, select Registration by "clicking" ON the radio button that precedes the word Registration.

>> Complete the FIVE fields (excluding the request for "counters" at this time).

>> Include the 10-character Registration Number noted previously.

>> "Click" SUBMIT. A receipt will be provided. It is suggested that this receipt be maintained in the back panel of a *CapacityWare*TM Library binder.

>> Return to the Main Menu.

FINISH

2. Backup System Regularly ().

Note: Recommend weekly system backup.

START - At the Main Menu.

>> "Click" on File in the upper left of the top menu bar.

>> Select, highlight, and "click" Backup Database from the pull-down menu.

>> The screen that appears provides instructions and the opportunity to Browse to a destination repository.

>> "Click" on Backup.

FINISH

3. Review Routine Conventions and Defaults ().

Note: The following features but not all are required. The review of Routine Conventions and Defaults is designed to formulate decisions on the use of and adequacy of lists that may be used during the course of the engagement.

START - At the Main Menu.

Regarding: Demographics (Adequacy)

- >> "Click" on Reports in the Main Menu pull-down bar, then "click" on Reports.
- >> Select and hover over Demographics, then "click" on Demographics Table. The list will result for review.

Regarding Attendance (if used, audit for accuracy)

Randomly select a few individuals each month for Attendance Report accuracy.

- >> "Click" on Reports in the Main Menu pull-down bar, then "click" on Reports.
- >> Select and "click" on Event Participation Record.
- >> Select and turn ON one of the filtering options - recommend highlight a Name.
- >> "Click" OK.
- >> Select a date range (normally set back the beginning date one or two years).
- >> "Click" OK.
- >> A Report will be generated in MS Word that can be send to the individual(s) targetted.

Regarding Locations (to assure a responsive list of options).

- >> "Click" on Activities, Events, File, New Event.
- >> Use the Locations pull-down to review the list available to determine sufficiency.
- >> "Click" CANCEL when potential additions are identified or list is adequate as is.
- >> To Add a Location, Select Add in the top menu bar, select and "click" Location.
- >> Enter the Location in the field available, then "click" Add.

Regarding Event Description(s) (to aid in effective "search/research" capability).

- >> "Click" on Activities, Events, File, New Event.
- >> Use the Event Description pull-down to review the sufficiency of the list available.
- >> "Click" CANCEL when potential additions are identified or list is adequate as is.
- >> To Add a Description, Select Add in the top menu bar, select and "click" Event Description.
- >> Enter the Event Description in the field available, then "click" Add.
- >> Clear or close and return to the Main Menu.

Regarding Event Team List (to assure a complete list of key change agents).

- >> "Click" on Activities, Events, File, New Event.
- >> Use the Lead Facilitator pull-down to review the sufficiency of the available list
- >> "Click" CANCEL when potential additions are identified or list is adequate as is.
- >> To Add a Change Agent Team member, Select Add in the top menu bar, select and "click" Consultant.
- >> Enter the Name in the field available, then "click" Add.
- >> FINISH

3. Registration of *CapacityWare*TM Software Counters/Licenses ().

START - At the Main Menu.

>> "Click" on About in the upper right of the Main Menu bar, then select and "click" About CapacityWare on the pull-down menu.

>> Make a note of the 10-character Registration Number. This number will be needed at the time of on-line registration.

>> "Click" OK to return to the Main Menu.

>> In the upper right of the tip menu bar, "click" Visit.

>> At the LTODI.COM site, locate and "click" the CapacityWareTM Software line.

>> At the next menu, "click" on CapacityWare Software Registration -

Note: The following instructions assume that the software has already been previously registered.

>> The on-line Registration Form appears. As a reason for submission, select Activation by "clicking" ON the radio button that precedes the word Activation.

Note: Both Registration and Activation may be accomplished at the same time. Select Both Registration and Activation.

>> Complete the SIX fields (including the request for a specified number of "counters" at this time).

>> Include the 10-character Registration Number noted previously.

>> "Click" SUBMIT. A receipt will be provided. It is suggested that this receipt be maintained in the back panel of a *CapacityWare*TM Library binder.

>> Return to the Main Menu.

Note: The registration will not be completed until confirmation of payment has been received at QWLC. You will then receive an e-mail with the "counter/license registration key" that will be used to activate instrument processing features in your software.

FINISH

4. Review of Upgrade *CapacityWare*TM Software Features ().

START - At the Main Menu.

>> "Click" About in the upper right menu bar, then select Check for Current Version.

Note: The on-line page that appears lists the most current features programmed into the software and the date of those features being available. The top menu label in *CapacityWare*TM lists the date the version was compiled that is on your computer. If features have been programmed AFTER the date your version was compiled, you may

request an updated version - probably at no additional charge if the version on your computer is a full-featured version (you have counters/licenses installed).

>> Near the top of the on-line form is the option to: ORDER CURRENT VERSION UPGRADE NOW. "Click" on this link and completed the on-line form. "Click" submit and await contact from *QWLC*.

>> Clear and close all pages back to the Main Menu.

FINISH