Residency 3 - *CapacityWare™* Administration
Managing Gains, Losses, and Placements/Transfers
CapacityWare™ Software Exercises

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

BEFORE ANYTHING ELSE - BEGINNING ROUTINE: Select a Client and Data Set ( ).

START
>> ICON
>> Register "No" Recommended (if no "counters" have been or are to be purchased)
"Yes" to purchase "counters"
>> *Check "Current Client" Data Window, if **not** appropriate files, then…*

>> File
>> Open Central Database may require browsing to find the correct client files
>> A "Warning" will appear, "click" OK (This warning suggests frequent backup.)
>> Browse to "P" Server.
>> Open "Capacityware" Folder.
>> Double Click on "CentralDB" File.

>> *Check "Current Client" Data Window, if **not** appropriate files, then…*

>> File
>> Double Click on LTData File.

>> Select and "click" desired Client ID
>> *Check "Current Client" window to confirm both Central and LTData correct…*
FINISH

1. Adding New Respondent Names ( ).

START - at the Main Menu
>> At the Main Menu, "click" Login (left column on the right panel of action keys).
>> In the lower right corner, "click" New.
>> Type the last name (comma and space), first name (space), middle initial (period).
[use upper and lower case - some versions convert this to all upper case]
>> "Click" OK.
>> The individuals' Demographic Screen appears. Select the appropriate demographics from among those that are available and add known information as appropriate. [If a new demographic category/label is required, go to #3, below.]
>> "Click" Save User.
>> "Click" OK to confirm the entry.
[Be careful not to leave this routine without saving or canceling as appropriate.]
FINISH

2. Managing Demographics - Selecting from current options ( ).

Note: It will be useful initially to run a Demographic Report that lists options.
Main Menu > Reports > Reports > Testees Table > File > Print

START - At the Main Menu.
>> "Click" the Login button (left column on the right panel of action keys).
>> Locate the individuals Name and Highlight it (one "click").
>> In the upper left, "click" Respondents.
>> In the Drop-down "click" Edit.
>> The current Respondent Screen appears. Make the appropriate adjustments.
[Adjustment may include: corrections, transfers, demographic deletions, etc.]
>> "Click" on Save Changes, and confirm as appropriate.
FINISH

3. Managing Demographics - Adding Demographic Options ( ).

Note: Use this routine when current demographics are insufficient and a new or modified demographic is required.

START - At the Main Menu.
>> "Click" Edit in the upper left.
>> "Hover" over Databases.
>> Select and "click" Add Demographic, unless you intend to edit current options (see # 4 below).
>> Ignore the cursor position in the "Demographic ID" position - "TAB" to the next field.
>> Enter a short "Description" for the new demographic - "TAB" to the next field.
>> Using the pull-down menu, "Select" the category within which the demographic fits.
>> "TAB" to the Expected Count box, and enter the estimated quantity of individuals that will likely fit this demographic. A number is required. Make it as accurate as possible.
>> "Click" Add, then when the fields are cleared, "click" Cancel unless you intend to add more demographic options.

4. Managing Demographics - Editing Demographic Options ( ).

Note: Use these Edit features sparingly to make corrections in the Description wording and Expected Count only.

START - - At the Main Menu.
>> "Click" Edit in the upper left.
>> "Hover" over Databases.

>> Select and "click" Edit Demographic, unless you intend to add to the current list of options (see # 3 above).

>> Using the drop-down menu option at the top of the Edit Demographic Screen.
>> "Select" by highlighting the Demographic you want to Edit and
>> DO NOT Edit the Demographic ID field.
>> You can Edit the Description field.
>> DO NOT Edit the Type field.
>> You can Edit the Expected Count field.
>> "Click" Update.
FINISH

5. Handling Name Changes ( ).

START - At the Main Menu.
>> "Click" on Login (left column on the right panel of action keys).
>> Locate the individuals Name and Highlight it (one "click").
>> In the upper left, "click" Respondents.
>> In the Drop-down "click" Edit.
>> The current Respondent Screen appears.
>> To the right of the "Notes" field, locate and "click" the Change Name button.
>> In the screen that appears, type the name correction as you would like it to appear.
>> "Click" Change to complete the transaction. Additional screens may appear if the name is NOT unique.
>> "Click" on Save Changes, and confirm as appropriate.
FINISH

6. Deleting Respondent Names ( ).

Note: Determine if the individual is at all likely to return (Archive is also an option).

START - At the Main Menu.
>> "Click" on Login (left column on the right panel of action keys).
>> Locate the individuals Name and Highlight it (one "click").
>> In the upper left, "click" Respondents.
>> In the Drop-down "click" Delete.
>> A cautionary/confirmation screen appears to assure you want to proceed.
>> Respond appropriately, normally by 'clicking" YES.
FINISH