The Credit Connection®
for Windows®

User's Guide

Release 2.0

TM-009-2004
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Statements

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1   Introduction

Welcome to **The Credit Connection** (**TCC**) *for Windows*, the newest resident screening report ordering and processing product from First American Registry, Inc. **TCC** *for Windows* is a system of hardware and software used to produce fast, accurate reports. Using the **TCC** *for Windows* software and your computer, applicant data is sent to First American Registry, Inc.'s host computers, repository data is obtained and processed, and the final merged report arrives back at your PC.

1.1 Features

TCC *for Windows* application includes the following features:

- ◆ Easy to use interface
- ◆ Native Windows application
- ◆ Easily filled-in window for applicant data collection
- ◆ Easy setup and use of multiple report types for convenient report selection
- ◆ Rapid report generation and delivery
- ◆ One, two, or three credit repository requests are merged into a single report
- ◆ Management reports
- ◆ Built-in modem database (select from hundreds of common modems)
- ◆ Communicates via the public telephone system
- ◆ Provides its own telecommunications software (no other communications software is required)
- ◆ Allows a variety of transmission options
  - ➢ Single resident screening report application
  - ➢ Multiple resident screening report applications
  - ➢ Batch transmission of any subset of the applications, or all of the applications
- ◆ Provides for a variety of configuration options
- ◆ Printer and communication port selection
- ◆ File and program access security
- ◆ Transaction logging
- ◆ Communication Error Logging
- ◆ Easy to understand error messages.

1.2   Hardware Requirements

The following list defines the **TCC** *for Windows* hardware requirements:

- ♦ 486 DX-66 (or higher) IBM Compatible PC
- ♦ VGA (or higher) Video Adapter
- ♦ 16 Megabytes Available Hard Drive Space (20 Megabytes recommended)
- ♦ 8 Megabytes RAM - Windows 3.1 and Windows for Workgroups
  16 Megabytes RAM - Windows 95/98
- ♦ Hayes Compatible Data-Fax Modem - 14.4 BPS

1.3   *Software Requirements*

The **TCC** *for Windows* software requires the use of *one* of the following operating systems:

♦   Microsoft® Windows 3.1
♦   Microsoft Windows for Workgroups
♦   Microsoft Windows 95/98

1.4   Technical Support

Technical support is available through the First American
Registry, Inc. Help Desk. For assistance, call:

(800) 369-9174

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2   Installing the Software

TCC *for Windows* software is installed on the PC using a floppy disk drive and a hard disk drive. Each drive has a letter designator that the operating system recognizes as belonging to that drive.

A typical computer configuration offers a 3.5" floppy diskette as "Drive A:" or "Drive B:" , a hard disk as "Drive C:", and a CD-ROM drive as "Drive D". Therefore, the installation in this configuration would be from floppy drive "A:" or "B:" to hard drive "C:", or from CD-ROM drive "D" to hard drive "C".

To determine the correct letter designator for each drive, refer to your computer's documentation or check with your System Administrator.

> **NOTE:** Installation of **TCC** *for Windows* software requires 16 Megabytes of disk space. However, it is recommended that you have 20 Megabytes of disk space available for running **TCC**, since each report generated requires storage space.

The following sections detail the steps required to install the software. If you are using Windows 3.1 or Windows for Workgroups, perform the installation instructions detailed in *Windows 3.1 Installation*. If you are using Windows 95/98, perform the installation instructions detailed in *Windows 95/98 Installation*.

2.1   Windows 3.1 Installation

1.   Place *Disk 1* of **TCC** *for Windows* installation diskettes in the floppy disk drive.

2.   From the *Program Manager*, select the *File* menu and click on *Run*.

3.   In the *Run* dialog box, enter:
      A:\INSTALL

4.   Click on *OK* to launch the installation program.
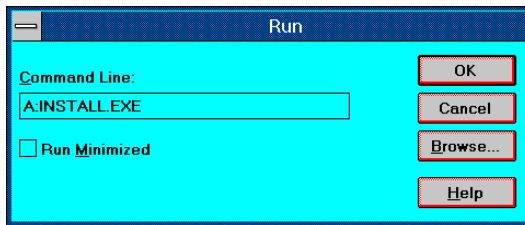
5.   Enter the requested information for each installation window displayed and click the *Next* button.

6.   When prompted by the installation program, remove and insert the remaining installation diskettes.

7.   Click on the *Finish* button, when the *Installation Completed* window is displayed.

After **TCC** *for Windows* is installed, configuration for
modem and printer settings, communication ports,
telephone numbers, account information, and report types
is required. The required configuration windows are
displayed when **TCC** *for Windows* is initially started. Refer
to *Chapter 3, Configuring the Software* for details on using the
configuration windows.

2.2   Windows 95/98 Installation

If you are using Windows 95 or 98, you can install the
software using either of the two following methods:

2.2.1   Automatic Installation Using A CD-ROM

Most Windows 95/98 PC's ship with a CD-ROM drive that
features an "auto-play" option. If this option has been
enabled, software installation, and music CD's, inserted
into the drive will automatically start whenever the drive
door is closed. Most software installation CD's now provide
an "auto-start" capability to take advantage of this unique
feature.

The installation CD will automatically load the software
installation program for you if your CD's "auto-play"
option has been enabled.

2.2.2   Manual Installation

1.   Place the Installation CD in the CD-ROM drive or
      Disk 1 of **TCC** *for Windows* installation diskettes in
      the floppy disk drive.

2.   From the *Start* menu, select ***Run***.

3.   In the *Run* dialog box, enter:
      A:\INSTALL or D:\INSTALL

4.   Click on ***OK*** to launch the installation program.
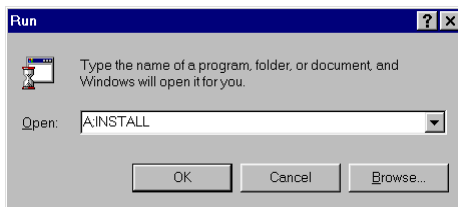
5.   Enter the requested information for each window
      displayed and click the ***Next*** button.

6.   When prompted by the installation program,
      remove and insert the remaining installation
      diskettes.

7.   When the *Installation Complete* window is
   displayed, click on the ***Finish*** button.

After **TCC** *for Windows* is installed, configuration for modem and printer settings, communication ports, telephone numbers, account information, and report types is required. The required Configuration windows are displayed when **TCC** *for Windows* is initially started. Refer to *Chapter 3, Configuring the Software* for details on using the Configuration windows.

2.3 Starting the Software

The following sections detail the steps to start **TCC** *for Windows* software. If you are using Windows 3.1 or Windows for Workgroups, perform the instructions detailed in *Starting TCC Using Windows 3.1*. If you are using Windows 95/98, perform the installation instructions detailed in *Starting TCC Using Windows 95/98*.
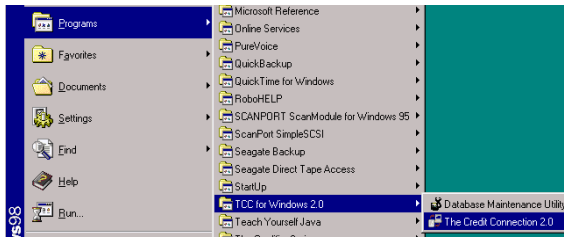
2.3.1 Starting TCC Using Windows 3.1

1. From the *Program Manager*, open the Group entitled *TCC for Windows*.

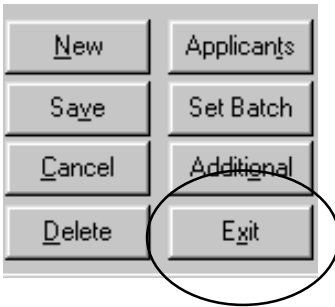2. Double-click the ***The Credit Connection 2.0*** icon to start the program.
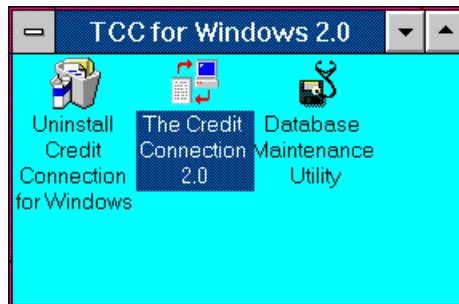
2.3.2   Starting TCC Using Windows 95/98

1. Click on the ***Start*** menu button.

2. Select Programs → *TCC for Windows* → *The Credit Connection.*

2.4   Exiting the Software

To exit **TCC** *for Windows*, click on the ***Exit*** button located in the lower right-hand portion of the main window.

3   Configuring the Software

All of the configuration windows can be accessed from the *Setup* menu within **TCC** *for Windows*.

Customer Profiles
Phone Numbers
Report Types
Port Setup
Modem Setup
Reconnect Modem

3.1   Customer Profiles Window

The *Customer Profiles* window is used to enter your First
American Registry, Inc. account information and select the
order in which the credit repositories are accessed.

> *Red* text box titles indicate that an entry in
> the associated text box is mandatory.

3.1.1 Completing a profile

Use the following information to complete a customer profile:

1. Enter your account number in the *Account Num* text box. This number is supplied by First American Registry, Inc..

2. Enter your customer password in the *Password* text box. This password *must* be on file at First American Registry, Inc..

3. When the *Apt. Association* check box is selected with a ✓. Enter your member name in the *Member Name* text box. *(This text box is not available for input when the Apt. Association check box is deselected.)*

4. When the *Apt. Association* check box is selected with a ✓, enter your member number in the *Member Number* text box.
   When the *Apt. Association* check box is deselected, enter the management company or owner name in the *Mgmt Co/Owner Name* text box.

5. Enter the caller name in the *Caller Name* text box.

6. Enter the caller's phone number in the *Caller Phone* text box.

7. If you use an internal identification code that identifies a specific building, enter the code in the *Bldg Code* text box. This text box is optional.

8. In the *Bureau Preferences* section, select the order that you want the repositories accessed. Enter **1**, **2**, or **3** in the text box associated with a specific repository. The repository marked with **1** is the first repository accessed by the program. If it is unavailable, the repository marked with **2** is accessed. The repository marked **3** is accessed if **2** is also unavailable. If you do not want reports from a specific repository, set that repository's number to **0**. Any repository with a priority number of **0** will automatically be skipped.

*NOTE:* To reset the repository order, set the text boxes back to zero and restructure the numbering sequence.

10. Click on *Done* to save the information entered and exit the window.

Configuring the Software

3.2 Phone Numbers Window

The *Phone Numbers* window is used to select a primary and an alternate telephone number to connect your computer to the First American Registry, Inc. facility.

There are three telephone number types:

♦ **Local** – Used when only the 7-digit number is dialed.
♦ **Long Distance** – Used when both the area code and the number 1 must be dialed before the 7-digit number.
♦ **10-Digit Dialing** – Used when only the area code and the 7-digit number are required. These numbers are used when the Telephone Company has 'split' an area code into two or more area codes but retains local calling charges for the new area code.
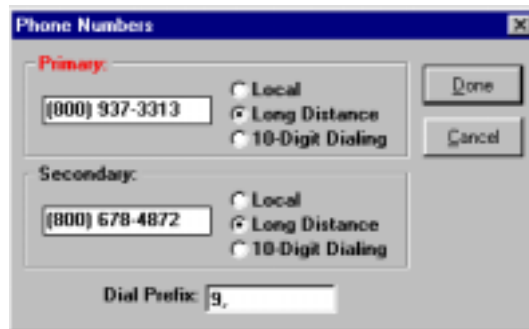
1. Enter the primary telephone number in the
   Primary text box. The full 10-digit phone number
   must be entered. This number is the first number
   dialed. An entry in this text box is mandatory.

2. Select the telephone number type by clicking on
   Local, *Long Distance*, or *10-Digit Dialing* so that a ●
   appears in the button.

3. Enter the secondary telephone number in the
   Secondary text box. The full 10-digit phone
   number *must* be entered. This number will be
   dialed if the primary number is unavailable.

4. Select the telephone number type by clicking on
   Local, *Long Distance*, or *10-Digit Dialing* so that a ●
   appears in the button.

5. Enter a dial prefix in the *Dial Prefix* text box if
   required at your location. If a pause is required
   between any digits, enter one or more commas.
   Dial prefixes are required by some telephone
   systems to obtain an outside line. This field can
   also be used to turn off the Call Waiting feature.
   Contact your System Manager, or local Telephone
   Company, for special codes used in your area.

6. Click on **_Done_** to save the information entered
   and exit the window.

3.3   Report Types Window

TCC has a very sophisticated report package available to help you with your client needs. Because each user has unique requirements, **TCC** now lets you quickly customize unique report packages – each one specially tailored to meet one of your current business needs.

TCC reports are delivered to your computer after processing is completed. You can view, print, and delete the reports at any time after receiving the completed report.

3.3.1   Report Types

The *Report Types* window is used to define report type profiles. Using this window, report types can be created, changed, or deleted.

Preferences
Phone **N**umbers
Report Types
P**o**rt Setup
Modem Setup

Reconnect Modem
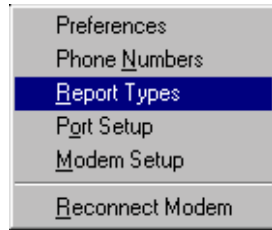
The *Report Types* window is a **TCC** form. Refer to *Chapter 10, Working with Forms* for information on working with columns and rows.

Package Name		Joint	Number of Bureaus	TeleCheck	Risk Predictor	Fraud Alert	Social Search	Creditor Detail	Tenancy
NO-PREFS-TEST	Settings	☐	NONE	☐	☐	☐	☐	☐	☑
DMV ONLY	Settings	☐	NONE	☐	☐	☐	☐	☐	☐
EVIC	Settings	☐	NONE	☐	☐	☐	☐	☐	☐
RES-EMP-VERIF	Settings	☑	NONE	☐	☐	☐	☑	☐	☑
TUEVIC	Settings	☐	SINGLE	☐	☐	☐	☐	☐	☐
*		☐		☐	☐	☐	☐	☐	☐

Report types must be defined before you can request information on a client. You will be prompted to set up your custom reports as soon as the system is installed.

Report types are defined by assigning a package name and selecting the report options you wish to be included in that package. The total number of custom reports you define, and the contents of each of these reports, is under your total control. To make your experience with **TCC** more pleasant and productive, please use package names that describe as clearly as possible the reporting function of each report package.
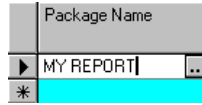
Report Type Setup							
					Report Types		
	Package Name		Joint	Number of Bureaus	TeleCheck	Risk Predictor	Fraud Alert
∗			☐		☐	☐	☐

3.3.2   Setting Up New Reports

To define a new report type:

Enter the package name in the
Package Name column.
Remember to use package names
that describe as clearly as possible
the reporting function of each
*report package*

(<u>NOTE</u>: There is a 30-
character limit on
report names.)

The first column to the right of
the *Package Name* column is the
Settings column.

Click the *Settings* button if you
want to change (override) the
Bureau Preferences you chose
when you setup your *Customer*
Profile account.

To modify your
preferences, simply click
on the ✓ in box to
uncheck *Use Customer*
Profile Preferences.
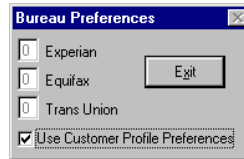
When this box is empty, you will be able to enter a number in the appropriate Bureau field(s). *The numbers indicate which Bureau is your first choice for information, second, etc.*
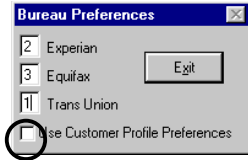
To complete the rest of the report, select the options you want to include in this report by clicking on the check box so that a ✓ appears in the box. (Use the scroll bar at the bottom of the screen to access additional options not displayed.)

A ✓ in the box in the *Joint* column indicates that this report includes a co-applicant.

The next column, *Number of Bureaus*, allows you to choose how many Bureaus will provide your information. Simply click in the field to display the ▼, which activates the drop-down menu. Choosing "DOUBLE" means that this report will pull information from the 1st two Bureaus.
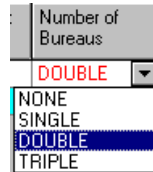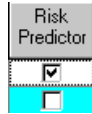
Note: Your selection here indicates the total number of bureaus you desire to provide information. The order in which they are polled is initially established when you setup your *Customer Profile* account. This order is overridden by your selection (if any) in the *Settings* column described earlier.

Placing a ✓ in this box will add TeleCheck to the list of reports included in your custom report package.
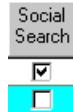
Configuring the Software
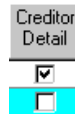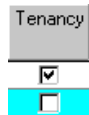
Risk Predictor

If you would like this client to be evaluated against bureau risk criteria place a ✓ in the *Risk Factor* column box.

To run a quick fraud check on this individual, place a ✓ in the *Fraud Check* box.

Fraud Alert
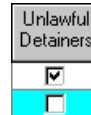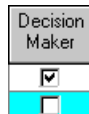
Social Search

To run a quick social security number check on this individual, place a ✓ in the *Social Search* box.

To obtain a more detailed report of credit activity on this individual, place a ✓ in the *Creditor Detail* box.

Creditor Detail
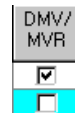
Tenancy

To obtain information on this individual previous residences, place a ✓ in the *Tenancy* box.

To determine if this individual has ever been evicted, place an ✓ in the *Unlawful Detainers* box.

Unlawful Detainers

Decision Maker

To obtain a recommendation on whether or not this individual should be accepted or rejected, based on your previously identified criteria, place an ✓ in the *Decision Maker* box.

To run a quick check on this individual through the Department of Motor Vehicles/Motor Vehicle Department, place an ✓ in the *DMV/MVR* box.

DMV/ MVR

To determine if this individual has a criminal record in Southern California, place an ✓ in the *So. Cal Criminal* box to check local law enforcement agencies. *Note: You may choose only one of the three criminal checks.*

To run a criminal record check on this individual covering standard FBI, etc. law enforcement records place an ✓ in the *Standard Criminal* box. *Note: You may choose only one of the three criminal checks.*
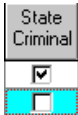
To run a criminal record check on this individual covering local state law enforcement agencies records place an ✓ in the *State Criminal* box. *Note: You may choose only one of the three criminal checks.*

To run a complete verification check on this individual's listed residences place an ✓ in the *Residential Verification* box.
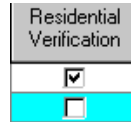
To run a complete verification check on this individual's listed employment place an ✓ in the *Employment Verification* box.

Click on ***Done*** to save the information entered and exit the window.
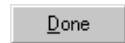
3.3.3   Setting a Default Report Type

The default report type can be selected from the report types defined on the *Report Types* window. To select a new default report type:

1. Click on the package name of the desired report type. A button appears at the right.
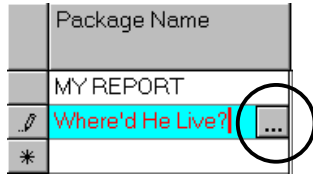
    [There is a 30-character limit on report names.]

2. Click on the button. A confirmation message window asks if you want to set the selected report as the default.

3. Click on the **OK** button to select the new default.

After you have selected and verified the default report, that package name and its associated options are displayed at the top of the report types list. The new default package name is now displayed in *red*.
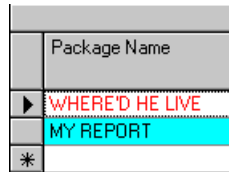
3.4 Port Setup

The information entered in the *Port Setup* window controls the communication settings that establish a communications path between your computer and the First American Registry, Inc. computers.

Customer Profiles
Phone Numbers
Report Types
Port Setup
Modem Setup
Reconnect Modem
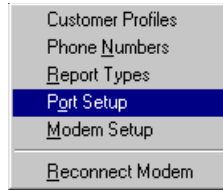
Use the following steps to define the communication settings:

1. Ensure that the setting for *Com Port* matches the setting appropriate for your modem.
2. Enable hardware flow control for baud rates of 9600 or above. Click on the *Hardware (RTS/CTS)* check box, so that an ✓ appears in the box.
3. Click on *OK* to save the communications settings.

The remainder of the
options within the
dialog box should not
be modified unless
directed by Help Desk
personnel.

NOTE: If your modem is able to dial, but
stops transmitting or cuts off before receiving
any data, click on the *Set DTR line high* check
box, so that a ✓ appears in the box.

3.5   Modem Setup

The information entered in the *Modem Setup* window
configures the software with the correct initialization
string for the selected modem make and model.

> **NOTE:** When selecting the modem make and
> model, if your modem is not listed, select
> *Hayes* in the *Make* section. In the *Model*
> section, select the *Compatible* model closest to
> your modem.

1.   Select the modem make (manufacturer or brand-
     name) from the *Make* section of the dialog box.

2.   Select the specific model from the *Model* section of
     the dialog box.

3.   Enter the communication port that corresponds to
     your modem's setup in the *Comm Port* text box.

4.   Click on **OK** to save the modem settings.
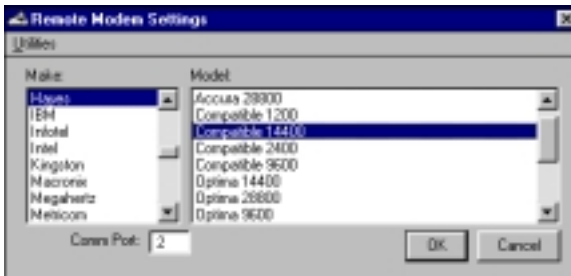
3.5.1   Modem Utilities

The *Modem Setup* window includes a utilities feature that allows you to add or delete modems, change the modem settings, or pack the database. To display the *Utilities* menu, click on the word *Utilities* at the top of the window.
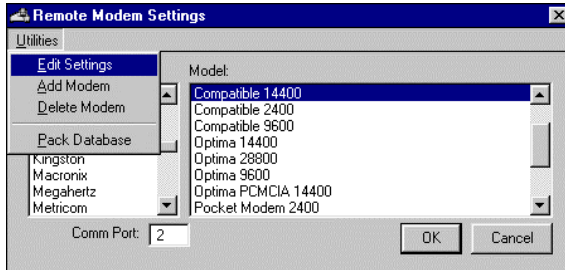
> **NOTE:** Only technicians experienced in modem communications should add, delete, or make changes to a modem's setup. Refer to your modem manual for the proper settings for your particular modem make and model.

♦ ***Edit Settings*** – When *Edit Settings* is selected, the *Modem Strings* window for the currently selected modem is displayed. Changes can be made to the settings used with that specific modem make and model.
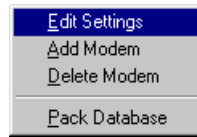
♦ ***Add Modem*** – When *Add Modem* is selected, the *Modem Strings* window is displayed. A new modem can be added by entering the required information in the window text boxes.

♦ ***Delete Modem*** – When *Delete Modem* is selected, the currently selected modem is deleted.

♦ ***Pack Database*** –When *Pack Database* is selected, the database is compacted. This means that a copy of the database is made and rearranged to minimize disk usage and increase operation speed.

3.6 Reconnect Modem

Because **TCC** *for Windows* allows
you to use your modem with
other applications, you will need
to "reconnect your modem"
before you attempt to generate
report requests or retrieve results.
To do this, simply "click" on this
menu option.

| Customer Profiles |
| Phone Numbers |
| Report Types |
| Port Setup |
| Modem Setup |
| Reconnect Modem |

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4   Using TCC for Windows

The following sections detail information on using **TCC** *for Windows* software.

If you are using Windows 3.1 or Windows for Workgroups, perform the instructions detailed in *Starting TCC Using Windows 3.1.*

If you are using Windows 95/98, perform the installation instructions detailed in *Starting TCC Using Windows 95/98.*

Once you have gotten **TCC** *for Windows* started, it operates basically the same way under either operating system. Therefore, the remainder of these instructions and helpful hints will be pooled together. For simplicity, most of the screen pictures and descriptions have been completed using the Windows 95 or Windows 98 operating systems. Windows 3.1 users should be aware that their screen might look slightly different — even though the basic functionality remains the same.

4.1   Starting TCC Using Windows 3.1

1.   From the *Program Manager*, open the Group entitled *TCC for Windows*.

2.   Double-click the ***The Credit Connection 2.0*** icon to start the program.
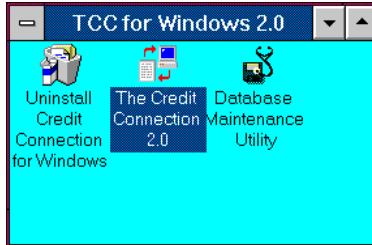
4.1.1 Enter User Initials and Password

TCC *for Windows* provides a security function that protects access to the program. If the security feature is setup and activated, **TCC** *for Windows* displays the *Security* window each time the software is started.
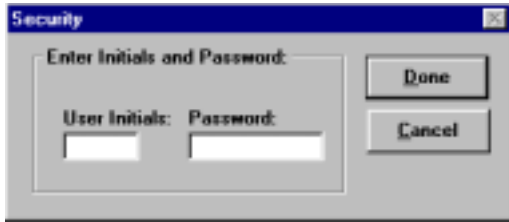
To access **TCC** *for Windows*:

1. Enter your user identification (initials) and password.
2. Click on the ***Done*** button.

For more information on setting up, or changing, the security function, please refer to *Chapter 5, Security and User Administration.*

4.2   Starting TCC Using Windows 95/98

1.   Click on the ***Start*** menu button.

2.   Select *Programs → TCC for Windows → The Credit Connection.*
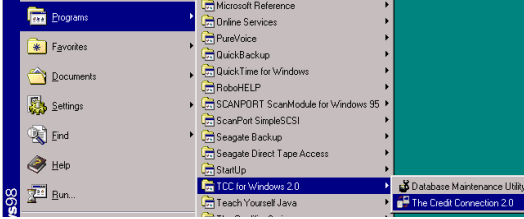
4.2.1 Enter User Initials and Password

TCC *for Windows* provides a security function that protects access to the program. If the security feature is setup and activated, **TCC** *for Windows* displays the *Security* window each time the software is started.
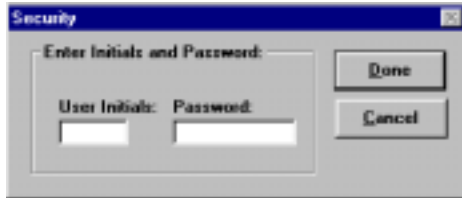
To access **TCC** *for Windows*:

1. Enter your user identification (initials) and password.
2. Click on the ***Done*** button.

For more information on setting up, or changing, the security function, please refer to *Chapter 5, Security and User Administration.*

4.3 Menu Bar

The menu bar provides drop down menus to access file functions, configuration setup windows, security functions, and online Help.

4.3.1 File Menu

The *File* menu allows you to choose from multiple databases, send requests, cancel a process, print reports, view reports, start the batch process, auto print, select a printer, access the management report function, view the Error Log, view the Transaction Log, clear the Transaction Log, clear the Error Log, and exit the software.
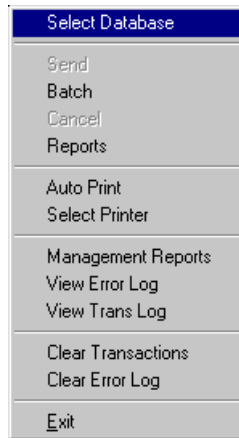
4.3.2 Setup Menu

The *Setup* menu allows you to access configuration windows used to select configuration options for communication port setup, modem setup, customer preferences, phone numbers, and report types.
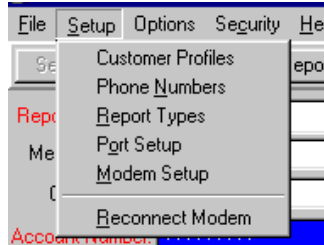
For more information on the *Setup* menu, refer to *Chapter 3, Configuring the Software*.

4.3.3 Options Menu

The *Options* menu provides two options to help you customize **TCC** to your needs.

The first is a simple "toggle" to identify if you belong to an apartment association.

If you place a ✓ by the *Apartment Assoc.* menu item you will be presented a slightly different set of fields in the *Customer Profile* setup window and also in the *Request Information* window.

The second menu item offers three *Sort Profiles* for your client records. They may be sorted *By Account Number, By Account Name,* or *By Member Number.*
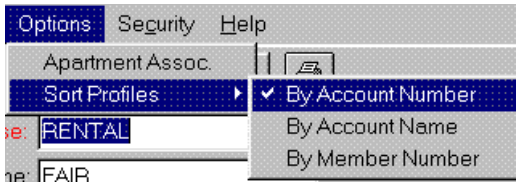
4.3.4   Security Menu

The *Security* menu provides access to the *Security* window. This window allows you secure access to the system by assigning user identifications and passwords for a system manager, administrator, and multiple users.

For more information the *Setup* menu, refer to *Chapter 5, Security and User Administration.*

4.3.5   Help Menu

The *Help* menu provides access to online Help, Technical Support Information, and information about **TCC** software.

Help
<u>C</u>ontents
<u>S</u>earch Help
<u>O</u>btaining Technical Support
<u>A</u>bout
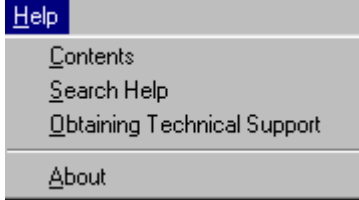
4.4 Button Bar

The button bar, located below the menu bar, contains buttons that provide access to the ***Send***, ***Batch, Cancel***, ***Report***, and ***Print***, functions.

- ♦ ***Send*** - Sends the current resident screening report request(s).
- ♦ ***Batch*** - Batch process all marked resident screening report requests.
- ♦ ***Cancel*** - Cancel the action currently in process.
- ♦ ***Reports*** – Open a reports list for the current client showing all reports available to view or print.
- ♦ ***Printer Icon*** - Auto Print feature. Automatically prints reports as they are received. This serves as a "toggle" switch. Click it to turn it on, or click it to turn it off.

4.5 Moving Between Window Items

You may use either of the two standard Windows methods of moving between items on your screen.

4.5.1 Mouse

To use your mouse to move between text boxes, button, combo boxes, radio buttons, etc. on your screen, simply place the mouse cursor over the item of your choice and *click* the left mouse button.

4.5.2 Keyboard

To move to the next text box, press **<Tab>**.

To move back to the previous text box, press **<Shift-Tab>**.

4.6   Exiting the Software

To exit **TCC** *for Windows*, click on the ***Exit*** button located in the lower right-hand portion of the main window.

5   Security and User Administration

TCC *for Windows* provides a security function that protects access to the program. This function allows the System Manager, the Administrator, and multiple users to be setup with user identifications and passwords. In addition, add, delete, and update permissions can be allowed or disallowed for each user.

Once the security function is setup and activated, **TCC** *for Windows* displays the *Security* window each time the software is started.
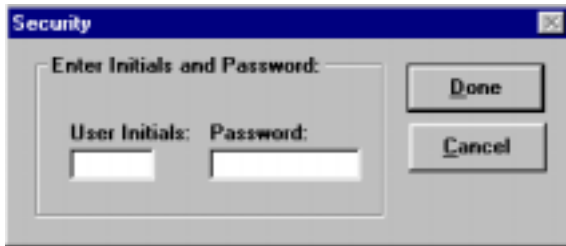
You must enter your user identification (initials) and password to access **TCC** *for Windows*.

5.1   Enabling the Security Function

In order to enable the security function, you must access the *Security* window and setup user identifications and passwords. To access the window, select *Security → Enable Security* from the menu bar.

5.2   Adding the System Manager

When the *Security* window is first displayed, notice that the *System Manager* option button is already selected.

> **NOTE:** More than one System Manager can be setup on the system, but there *must* be at least one System Manager.

The System Manager is the first level of user and has full access to the system. In addition to entering, requesting, and generating reports the System Manager can:

- ◆ Add, change, or delete users
- ◆ Add, change, view, and delete passwords
- ◆ Setup or change the system configuration options
- ◆ Change credit bureau preferences
- ◆ Delete the Transaction Log

To setup the user
identification,
password, and
permissions for
the System
Manager:

1. Enter the System Manager's initials in the *User Initials* text box.

2. Enter the System Manager's password in the *Password* text box.

3. To verify the password, re-enter the password in the *Verify* text box.

4. The System Manager has add, delete, and update privileges. The **Add**, **Delete**, **Update** and **Multi Account** check boxes have an ✓ in each box and are "grayed-out" for the System Manager.

5. Click on **Save** to save the information.

After the information is saved, you can access all of the other buttons at the bottom of the window.

New	Displays a blank *Security* window.
Delete	Deletes the currently displayed user.
Save	Saves the information entered in the window.
Cancel	Cancels the window and discards unsaved information
View Password	Displays the password in the *Password* text box.
Exit	Exits the *Security* window.

5.3   Adding the Administrator

The Administrator is the second level of user and has access to all levels of system administration *EXCEPT*:

- ◆ Setting the credit bureau preferences
- ◆ Deleting the Transaction Log

To setup the user identification, password, and permissions for the Administrator:

1. Click on the **New** button on the *Security* window. A blank window is displayed.

2. Click on the *Administrator* option button so that an ● appears in the button.

3. Enter the Administrator's initials in the *User Initials* text box.

4. Enter the Administrator's password in the *Password* text box.

5. To verify the password, re-enter the password in the *Verify* text box.

6. Ensure that the Administrator has add, delete, and update privileges. Click on the **Add**, **Delete**, **Update,** and **Multi Accounts** check boxes, so that an ✓ appears in each box.

Click on **Save** to save the information.

5.4   Adding Users

The third level of user is setup for data entry and credit report submission only. This user cannot perform any administrative tasks allowed to the System Manager and the Administrator.

Multiple **TCC** *for Windows* users can be added through the *Security* window.

1.   Click on the *New* button on the *Security* window. A blank window is displayed.

2.   Click on the *User* option button so that an ● appears in the button.

3.   Enter the new user's initials, password, and the access privileges you want this user to have. If this User is allowed access to multiple accounts for processing, ensure that you place an ✓ appears in the *Multi Account* check box. This option will allow this User to select from all accounts available in the *Account Number* field on the *Request Information* window.

4.   Click on *Save* to save the information.

5.   Continue to add users by clicking on *New*, entering the user information, and clicking on *Save*.

6.   To view the users, use the scroll bar at the bottom of the window. The information for the different users is displayed as you scroll left or right.

7.   When you have entered all users, click on *Exit* to close the *Security* window.

5.5   Deleting Users

To delete a user from the system:

1.   Use the scroll bar at the bottom of the *Security* window to scroll to the user you want to delete.

2.   Press the ***Delete*** button.

> ***CAUTION:*** When you click on the *Delete* button, the user is deleted. There is no warning or confirmation window displayed.

5.6   Deactivate Security

If you no longer require
security on **TCC**, simply
click on the *Deactivate
Security* option on the
Security menu.

Maintain Security
Deactivate Security

Caution: This option permanently removes
all user security information. If you later
decide to reactive security again, all previous
security user information will be required to
be entered again.

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6   Entering Request Information

The **TCC** *forWindows* window consists of two sections:

- ♦ *Request Information* window
- ♦ *Request Selections* window

The *Request Information* window is used to enter all pertinent information about the requester, the rental property, and the primary applicant and spouse.

The *Request Selection* window is used to display an applicant list, select the report type, and access the command button functions.

6.1   Request Information Window

The *Request Information* window consists of sections for
caller information, rental address information, applicant
information, and applicant address information. *Required
information for each of these sections is displayed in red.*

6.1.1   Caller Information Section

The *Caller Information* section contains information on the
customer requesting the resident screening report. The
majority of the information is entered automatically from
entries in the *Preferences* window.

The available fields and the fields required vary depending
on the options set in the *Preferences* window.

This section lets you
identify the purpose of this
request for information by

choosing from a drop down menu box. Your choices are
"Employment" or "Rental". Additionally, the Member
Name, Caller Name, and Caller Phone are typically
completed with information previously entered.

Entering Request Information

> **Note**: Access to different fields is controlled depending on whether or not you belong to an apartment association. If you do, you should click on the *Apartment Assoc* menu choice on the *Options* menu.

If the *Apartment Assoc.* menu item has a ✓ you will be required to enter a *Member Name*. If this field has not been selected, the *Member Name* field will not be visible. *Required fields are identified in red.*

The *Account Number* field and the Report Type field are also "drop down" menu items that let you choose from information previously completed.

6.1.2   Rental Address Section

The *Rental Address* section is used to record the address and rent information for the rental property the applicant is applying to rent.

Both the street type and the state can be selected from a drop down list box.

6.1.3   Applicant Section

The *Applicant* section is used to enter information about the applicant(s).

When entering information in the Applicant section, the text boxes accept alpha or numeric values only:

- ♦   Do *not* use punctuation within any text box.
- ♦   Do *not* use control characters within text box.

6.1.4   *Entering Applicant Information*

The first set of name text boxes is for the *Primary Applicant*. The second set of name text boxes is for the *Joint Applicant*. When ordering an individual report, only the *Primary Applicant* text boxes are accessible.

- ♦ Do *not* request a joint report for unmarried applicants.
- ♦ If an applicant's name is hyphenated or uses an accent, do *not* enter the hyphen or accent in the name field.

1. Enter the applicant's last name, first name, and middle initial in the respective text boxes.
2. The *Gen* drop down list box is used to indicate generation. Select a valid entry from the list. Valid entries are **J**, **S**, **2**, **3**, and **4**.
3. Enter the Social Security Number in the *SSN* text box. Do *not* use hyphens when entering Social Security Numbers. The system enters the hyphens automatically.

4. Enter the applicant's date of birth in the *DOB* text box. You may enter the date directly, or by selecting it off the "pop-up" calendar.

Simply click the ▼ *and then scroll to the correct year and month. Next click on the*

correct date to complete the entry.

February						1970	
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
1	2	3	4	5	6	7	
8	9	10	11	12	13	14	
15	16	17	**18**	19	20	21	
22	23	24	25	26	27	28	

5. Enter the applicant's driver license number in the *DL* text box when this field is available.

6. Enter the 2-character state code where the driver license was issued in the *ST* text box, or select the state code from the drop down list.

7. If this is a joint request, use the scroll bar to the right of the *Primary Applicant* section to display the *Joint Applicant* section. *It is available only when the report you have previously chosen has been marked as a "Joint Report".* Enter the spouse information in this section.

Joint Applicant:
Last: CREDCO   First: CHARLENE   MI: Gen:
SSN: 987-65-4321   DOB: 02/18/1970   DL: A7654321   ST: CA

6.1.5   Address Section

The *Address* section is used to enter current and previous addresses of the applicant(s).

When entering address information, the text boxes accept alpha or numeric values only:

- ♦ Do *not* use punctuation within any text box.
- ♦ Do *not* use control characters within text box.

6.1.6   Entering Address Information

The first set of address text boxes is for the current *Address*. The second set of name text boxes is for a *Previous Address*. The third set of text boxes is for a *Prior Address*.

1. Enter the number of the house address in the *Street Num* text box. When entering the number of the house address, the system does not allow you to enter spaces between numbers.
If the numeric address is followed by a fraction (such as ½ or ¼), leave out the fractional value. The system does not allow you to enter fractional values.

2. Enter the street name in the *Street Name* text box.

3. Enter the street type in the *Type* text box, or select the street type from the drop down list.

4. When applicable, enter the apartment or unit number in the *Unit* text box. When entering an apartment number, do *not* enter the # (number) sign.

5. Enter the city in the *City* text box.

6. Enter the 2-character state code in the *State* text box, or select the state code from the drop down list.

7. Enter the ZIP code in the *Zip* text box. The ZIP code *must* be a valid code for the state entered in the *State* text box.

8. In the *From* text box, enter the date the applicant first lived at this address. You may enter the date directly, or by selecting it off the "pop-up" calendar.

   Simply click the ▼ *and then scroll to the correct year and month. Next click on the correct date to complete the entry.*

February					1970	
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

9. In the *To* text box, enter the date the applicant last lived at this address. You may enter the date directly, or by selecting it off the "pop-up" calendar.

   Simply click the ▼ *and then scroll to the correct year and month. Next click on the correct date to complete the entry.*

February					1970	
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

10. When previous addresses are provided, click on the down arrow or use the scroll bar to the right of the *Address* section to display the *Previous Address* section and then the *Prior Address* section. Enter the address information in these sections.

6.2   The Request Selection Window

The *Request Selection*
window contains the
applicant list and the
Command Buttons used to
access various functions.

6.2.1   Applicant List Box

The Applicant List Box displays a list of completed and
saved applicant entries. The currently selected applicant is
highlighted and the applicant information is displayed in
the Request Information section. Clicking on a different
applicant causes that applicant to become the current
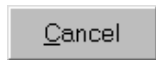applicant.

6.2.2   Command Buttons

Command buttons, located at the lower right of the
window, provide access to the *New*, *Save*, *Cancel*, *Delete*,
Applicants, *Set Batch*, *Additional*, and *Exit* functions.

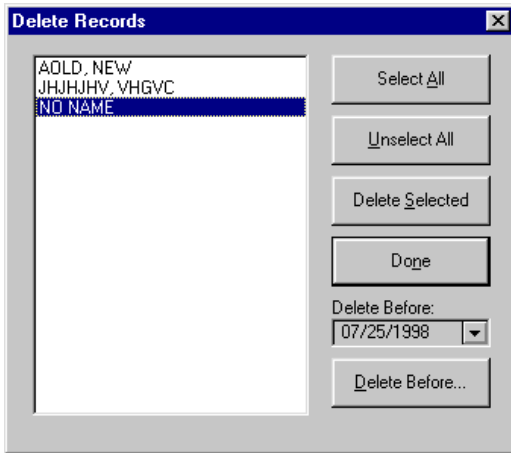|	
New	Create a new, blank *Request Information* window.
Save	Save the current *Request Information* window data.
Cancel	Cancel additions or modifications to the current *Request Information* window data.
Delete	Select the client(s) to be deleted.

TCC for Windows

You may select the clients individually using standard selection methods or simply click on the *Select All* button if you wish to mark all clients for deletion. You may also remove the mark by simply clicking *Unselect All*.

To actually delete the selected records, click on the *Delete Selected* button.

Note: No client records/reports are actually deleted until you click the *Delete Selected* button. *Be careful, selected records will be permanently deleted — there is no "undo".*

To delete records based on the date they were entered, enter the date entered, or click on the ▼ arrow, in the *Delete Before* window. After you have entered the date, click on the *Delete Before* button to delete these records.

Click on the *Done* button to return to the primary *Request Information* window.

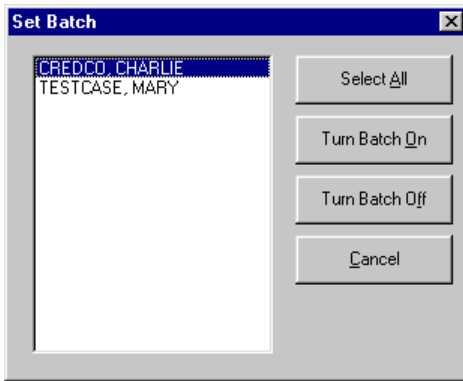Entering Request Information

| Applicants | Displays the *Applicants List* window. This window includes applicant information, order status, print status, and transaction date. The *Applicants List* window is a **TCC** form. Refer to *Chapter 7, Working with Forms* for information on working with columns and rows. |

Set Batch	Displays the *Set Batch* window.

Set Batch

CREDCO, CHARLIE
TESTCASE, MARY

Select All

Turn Batch On

Turn Batch Off

Cancel

You may select the clients individually using standard selection methods or simply click on the *Select All* button if you wish to include everyone in the batch process.

Click on the *Turn Batch On* button to activate batch processing or the *Turn Batch Off* button to deactivate batch processing. Click on the *Cancel* button to leave this window with no changes.

Additional

This button allows you to define additional information required whenever you have selected a Residential Verification; Employment Verification; or a Decision Maker report. Clicking this button will bring up the following *Additional Information* window.
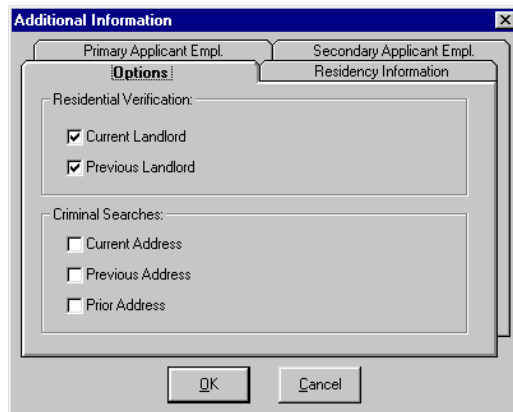
Using the initial *Options* tab, you can request residential verification of the Current Landlord and the Previous Landlord.

You can also use this tab to conduct criminal searches of the current, previous, and prior addresses.

The *Residency Information* tab is used to enter the
name and telephone number of the current and
previous landlords. These individuals will be
contacted to provide verification of submitted
residence information.

The *Primary Applicant Empl* tab is used to provide detailed employment information on the primary applicant. This information will be used to provide employment verification.

Note: Red field names denote required fields.

The *Secondary Applicant Empl* tab is used to provide detailed employment information on the secondary applicant. This information will be used to provide employment verification.

Note: Red field names denote required fields.

Exits the program.

6.3   Status Bar

The status bar displays various messages during the process of entering request information, transmitting reports, and receiving reports. In addition, order and print status is displayed. The information displayed in the status bar is useful in the troubleshooting process.

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7 Ordering, Viewing, Printing, and Deleting Reports

TCC *for Windows* allows you to order a single report, or to order multiple reports (*batch* processing).

The *Report Type* field in the *Request Information* window provides a menu of available reports.
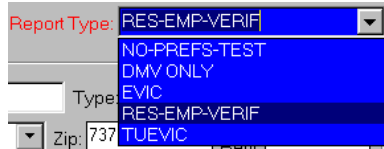
To select a report for the active client, simply click on it and then click on the ***Save*** button.

> Note: The *active* client is the one whose name is visible in the *Primary Applicant* section of the *Request Information* window. It is also the client whose name is highlighted in the *Request Selection* window.

TCC reports are delivered to your computer after processing is completed. You can view, print, and delete the reports at any time after receiving the completed report.

7.1 Ordering a Single Report

To transmit a single request for a resident or employment screening report, you must:

Select the client you wish to run a report on.

Their information will be displayed in the *Request Information* window.
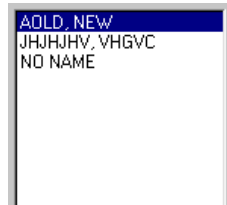
Select the reason you want to run the report.

Then select the report you want to run.
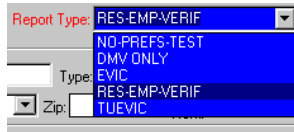
Last, click on the **Save** button in the *Request Selection* window and then the **Send** button located on the button bar. This will assure that this combination of client and report information is processed correctly by **TCC**.

7.2   Ordering Multiple Reports

To transmit multiple requests:

7.2.1   Selection Method #1

Click on the *Set Batch* command button.

The *Set Batch* window is displayed.

In the *Set Batch* window, highlight the requests you want to transmit. You can select all requests by clicking on the *Select All* button.

The batch process will prepare to submit the "currently selected report" for each client selected.

Click on the ***Turn Batch On*** button to exit and finish marking the selected individuals for batch processing.

Turn Batch On

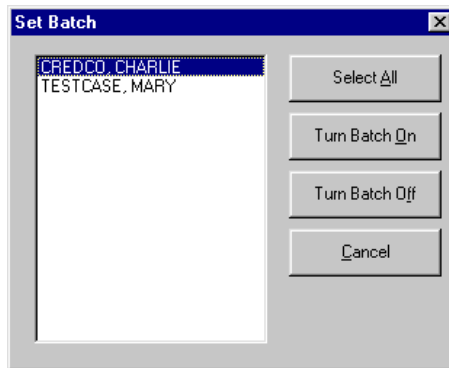**Note**: Be aware that **TCC** can only process complete, accurate requests. Therefore, any records that contain missing or inaccurate information will be automatically removed from the *Batch* process.

Turn Batch Off

If you have selected an individual for batch processing in error, simply reselect the record and click on the ***Turn Batch Off*** button to unmark the individual and exit.
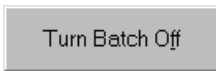
Click on the ***Done*** button to exit without selecting any records for batch processing.

Done

Click on the ***Batch*** button on the *Menu* bar to transmit your batch request.

Send | Batch | Cancel | Reports | 🖨
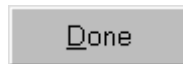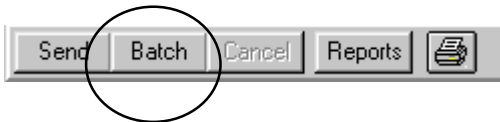
Once the *Batch* request has been submitted, all batch processing flags are automatically removed from all processed records.

Ordering, Viewing, Printing, and Deleting Reports

7.2.2   Selection Method #2

Select a record to
be included in the
batch process.
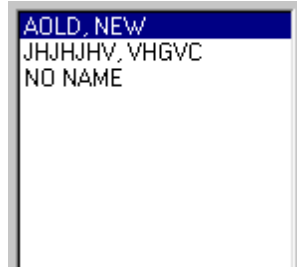
Use your mouse to "click" in
the *Batch* check box located
directly above the *Report
Type* window.

Note: If the *Batch* check box is "grayed-out", you
have an error(s) in this record. This error is
identified in "red" on the status bar at the
bottom of the *Request Information* window.

Repeat this process for each record you want
included in the batch request.

Click on the ***Batch*** button on the *Menu* bar to
transmit your batch request.
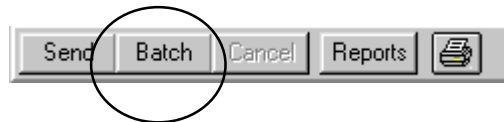
7.3   Viewing Reports

To view a report:

1.   In the *Request Selection* window, highlight the report you want to view by clicking on the applicant's name.

2.   Click on the ***Reports*** button, located on the button bar.

The *Print Preview* window allows you to preview the **TCC** report on your screen.

Use the scroll arrows at the bottom of the window to view additional pages of the report.

To print the current report, click on the ***Printer*** icon.

To exit the *Print Preview* window, click on the ***Exit Door*** icon.

7.4   Printing Reports

To print a report or group of reports:

1.   In the *Applicant List* section, highlight the report or group of reports you want to print by clicking on the applicant's name.

2.   Click on the ***Reports*** button, located on the button bar.

The above procedure prints the report to your default printer.

Other printing options, such as selecting which printer to print to, are available from ***File → Select Printer*** on the menu bar. For additional information, refer to your Windows documentation, or contact the Help Desk.

7.4.1   Automatic Printing

To automatically print reports when they are received, use one of the following:

♦   Select *File → AutoPrint* from the menu bar.
♦   Click on the ***Printer*** icon located on the button bar.

7.4.2   Reprinting an Existing Report

When **TCC** returns a report, it electronically stores the report on your computer. Provided you have not, at any time, selected the report for deletion, you can print an additional copy of the report from your computer.

1.   In the Applicant List section, locate and select the report you want to reprint.

2.   Click on the ***Print*** button on the button bar.

If you have previously received a report and since deleted it from your computer, you must resend the request for processing.

7.5 Deleting Reports

All **TCC** reports are associated with client records. Therefore, to delete a report(s) for an individual client, you simply delete the client record. To delete a client(s) record report(s):

1. In the *Request Selection* window, click on the **Delete** command button. The *Delete Records* window is displayed.
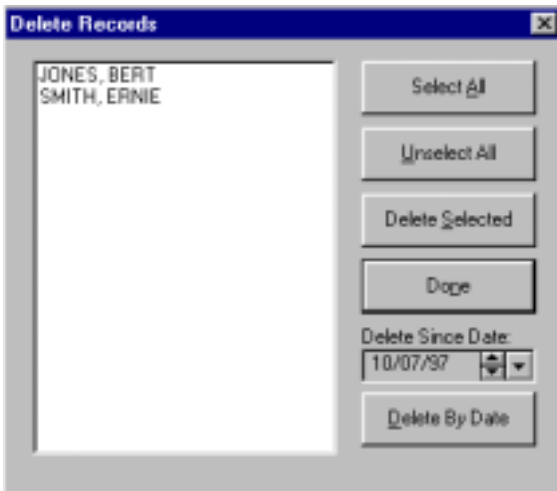
2. Select the applicant or applicants you want to delete. If you want to delete all requests and reports, click on **Select All**. If you want to delete all requests and reports since a specific date, enter the date in the *Delete Since Date* text box.

3. Click on the **Delete Selected** button (or the **Delete By Date** button). A warning window is displayed.

4. If you are sure you want to permanently delete the reports, click on **OK**. Click on **Cancel** if you do not want to delete the selected reports.

5. When the requests and reports are deleted, click on the **Done** button

8   Viewing and Clearing Logs

TCC *for Windows* provides transaction and error logging. The Error Log displays the date, time, error code, and a description of the error. The Transaction Log displays the date and time of each transaction.

All users can view the Transaction Log and the Error Log.

The ability to clear the Transaction or Error Log is restricted. Only the System Manager has permissions to clear these logs.
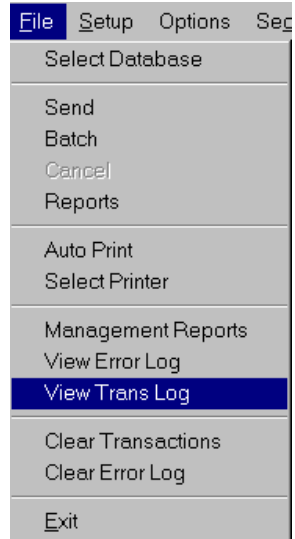
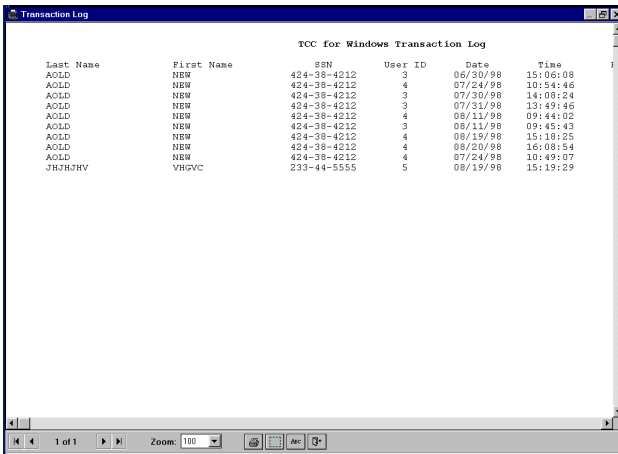**Note**: At the first of every month, the Error Log is cleared automatically by the system.

8.1 Viewing the Transaction Log

To view the *Transaction Log*, select *File → View Trans Log*.
The *Transaction Log* window is displayed.

The current page number of the *Transaction Log* is shown on the Transaction Log tool bar, at the bottom of the window.

Additional functions can also be selected from the tool bar.

H◄	Click this icon to move to the beginning of the transaction log file.
◄	Click this icon to move one page to the left in the transaction log file.
►H	Click this icon to move to the end of the transaction log file.
►	Click this icon to move one page to the right in the transaction log file.
Zoom: 100	Use the *Zoom* drop down text box to enlarge or reduce the size of the displayed Transaction Log. You can use the Scroll Bar at the bottom of the screen to move "left" or "right" to see more of the transaction log.
🖨	Click on the printer icon to print the transaction log on your default printer.
⬚	Click this icon to adjust the margins for your printed report.
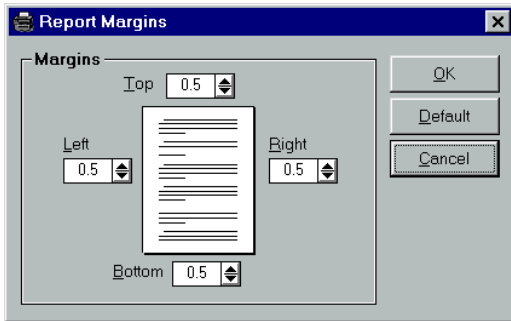
Use the margin windows to adjust the top,
bottom, left, or right margins. When you are
finished, click **OK** to save your changes and exit.
Click **Cancel** to exit without saving your
changes. To restore your margin settings to the
default system margins (½"), click the **Default**
button.

	Click on this icon to select a different font for your report.
	Click on this icon to close the *View Transaction Log* window and return to **TCC**.

8.2   Clearing the Transaction Log

To clear the *Transaction Log*, select ***File → Clear Transaction Log.*** A delete warning window is displayed.
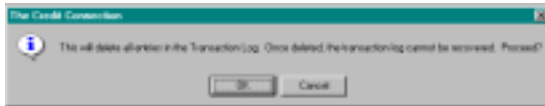
To delete all entries in the Transaction Log, click on the ***OK*** button. An information window confirms that the Transaction Log was successfully deleted. Click on the ***OK*** button.
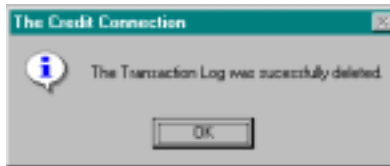
8.3 *Viewing the Error Log*

To view the *Error Log,* select *File → View Error Log.* The *Error Log* window is displayed.
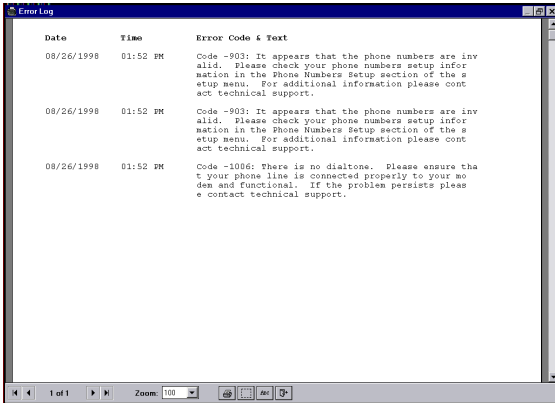
The current page number of the Error Log is shown on the Error Log tool bar, at the bottom of the window.

Additional functions can also be selected from the tool bar.

 Click this icon to move to the beginning of the error log file.

 Click this icon to move one page to the left in the error log file.

 Click this icon to move to the end of the error log file.

 Click this icon to move one page to the right in the error log file.

 Use the *Zoom* drop down text box to enlarge or reduce the size of the displayed error Log. You can use the Scroll Bar at the bottom of the screen to move "left" or "right" to see more of the error log.

 Click on the printer icon to print the error log on your default printer.

 Click this icon to adjust the margins for your printed report.

Use the margin windows to adjust the top,
bottom, left, or right margins. When you are
finished, click **OK** to save your changes and exit.
Click **Cancel** to exit without saving your
changes. To restore your margin settings to the
default system margins (½"), click the **Default**
button.

|	
	Click on this icon to select a different font for your report.
	Click on this icon to close the *View Error Log* window and return to **TCC**.

8.4   Clearing the Error Log

To clear the Error Log, select *File → Clear Error Log.* A delete
warning window is displayed.
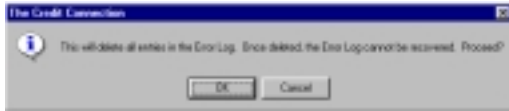
To delete all entries in the *Error Log,* click on the **OK**
button. An information window confirms that the *Error Log*
was successfully deleted. Click on the **OK** button.
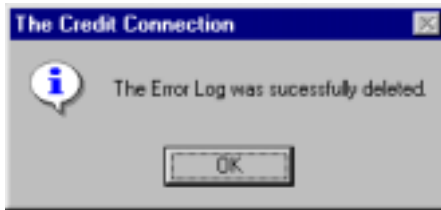
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9 Management Reports

TCC *for Windows* provides a Management Report function. Reports are available for:

- ♦ Inquiries by Member Number
- ♦ Inquiries by Building Code
- ♦ Inquiries by Date
- ♦ Report Types List
- ♦ System Configuration
- ♦ Users List

To access the Management Report function, select *File →
Management Reports.* The *Management Reports* window is
displayed.

The drop down list text box provides access to the various reports. Click on the arrow to display the list of reports available.
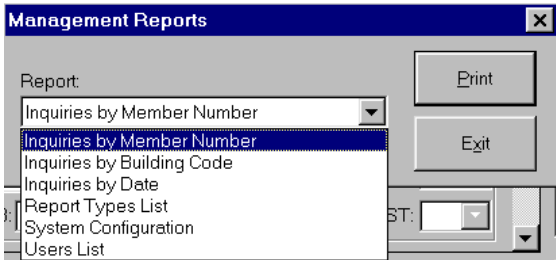
To select a report for entry in the text box, click on the desired report. Click on the **Print** button to preview the report.

9.1   Inquiries by Member Number Report

The Inquiries by Member Number report contains a list of
all resident screening report requests grouped by Member
Number.

The current page number of the report is shown on the
report tool bar, at the bottom of the window.

Additional functions can also be selected from the tool bar.

|◀	Click this icon to move to the beginning of the report file.
◀	Click this icon to move one page to the left in the report file.
▶|	Click this icon to move to the end of the report file.
▶	Click this icon to move one page to the right in the report file.
Zoom: 100 ▼	Use the *Zoom* drop down text box to enlarge or reduce the size of the displayed report. You can use the Scroll Bar at the bottom of the screen to move "left" or "right" to see more of the error log.
🖨	Click on the printer icon to print the error log on your default printer.
⬚	Click this icon to adjust the margins for your printed report.

Report Margins

Margins

Top 0.5

Left 0.5

Right 0.5

Bottom 0.5

OK

Default

Cancel

Use the margin windows to adjust the top, bottom, left, or right margins. When you are finished, click ***OK*** to save your changes and exit. Click ***Cancel*** to exit without saving your changes. To restore your margin settings to the default system margins (½"), click the ***Default*** button.

ABC	Click on this icon to select a different font for your report.
	Click on this icon to close the *View Error Log* window and return to **TCC**.

9.2   Inquiries by Building Code

The *Inquiries by Building Code* report contains a list of all resident screening report requests sorted by the building code.

The current page number of the report is shown on the report tool bar, at the bottom of the window.

Additional functions can also be selected from the tool bar.

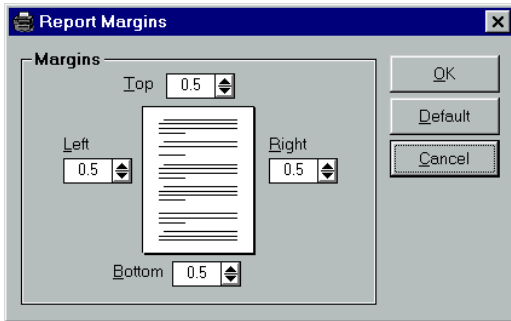|	
⏮	Click this icon to move to the beginning of the report file.
◀	Click this icon to move one page to the left in the report file.
⏭	Click this icon to move to the end of the report file.
▶	Click this icon to move one page to the right in the report file.
Zoom: 100	Use the *Zoom* drop down text box to enlarge or reduce the size of the displayed report. You can use the Scroll Bar at the bottom of the screen to move "left" or "right" to see more of the report.
🖨	Click on the printer icon to print the report on your default printer.

Click this icon to adjust the margins for your printed report.

Report Margins

Margins

Top 0.5

Left
0.5

Right
0.5

Bottom 0.5

OK

Default

Cancel

Use the margin windows to adjust the top, bottom, left, or right margins. When you are finished, click *OK* to save your changes and exit. Click *Cancel* to exit without saving your changes. To restore your margin settings to the default system margins (½"), click the *Default* button.
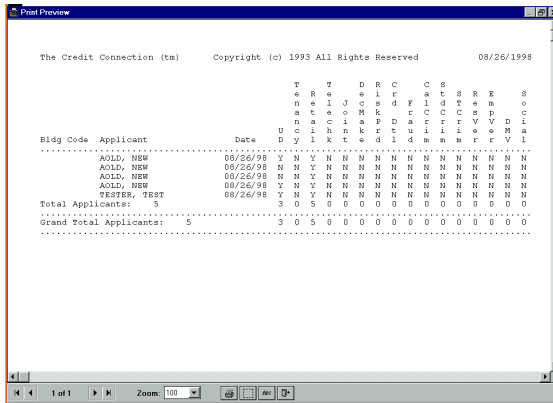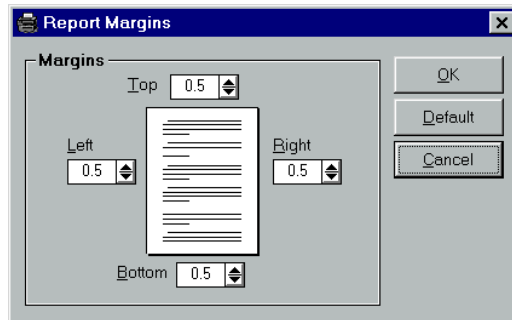
Click on this icon to select a different font for your report.

Click on this icon to close the *report* window and return to **TCC**.

9.3 Inquiries by Date Report

The *Inquiries by Date* report contains a list of all resident screening report requests sorted by the request date.

The current page number of the report is shown on the report tool bar, at the bottom of the window.

Additional functions can also be selected from the tool bar.

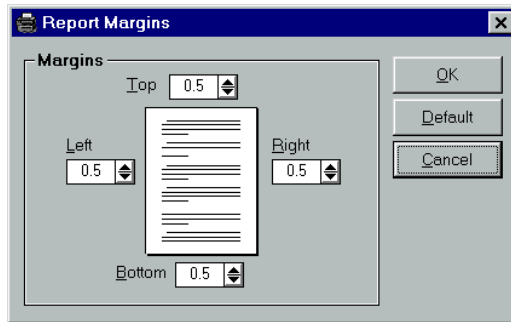|	
	Click this icon to move to the beginning of the report file.
	Click this icon to move one page to the left in the report file.
	Click this icon to move to the end of the report file.
	Click this icon to move one page to the right in the report file.

Zoom: `100` ▼   Use the *Zoom* drop down text box to enlarge or reduce the size of the displayed report. You can use the Scroll Bar at the bottom of the screen to move "left" or "right" to see more of the report.

🖨   Click on the printer icon to print the report on your default printer.

⬚   Click this icon to adjust the margins for your printed report.

Report Margins

Margins

Top `0.5`

Left `0.5`   Right `0.5`

Bottom `0.5`

OK

Default

Cancel

Use the margin windows to adjust the top, bottom, left, or right margins. When you are finished, click **OK** to save your changes and exit. Click **Cancel** to exit without saving your changes. To restore your margin settings to the default system margins (½"), click the **Default** button.
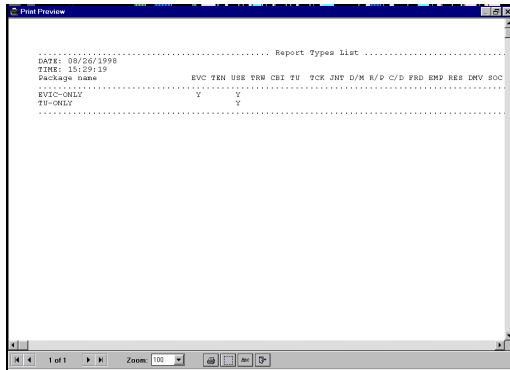
ABC Click on this icon to select a
different font for your report.

 Click on this icon to close the
report window and return to
TCC.

9.4 Report Types List Report

The Report Types List report lists the currently defined report types available for use.

The current page number of the report is shown on the report tool bar, at the bottom of the window.

Additional functions can also be selected from the tool bar.

◄	Click this icon to move to the beginning of the report file.
◄	Click this icon to move one page to the left in the report file.
►│	Click this icon to move to the end of the report file.
►	Click this icon to move one page to the right in the report file.

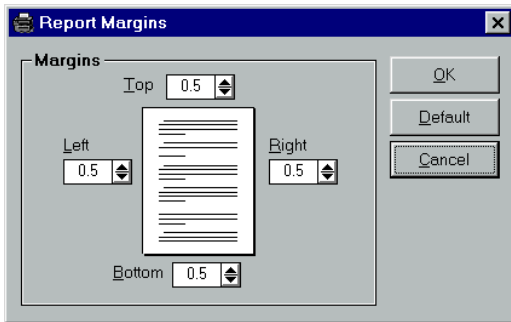Zoom: 100 — Use the *Zoom* drop down text box to enlarge or reduce the size of the displayed report. You can use the Scroll Bar at the bottom of the screen to move "left" or "right" to see more of the report.

Click on the printer icon to print the report on your default printer.

Click this icon to adjust the margins for your printed report.

Use the margin windows to adjust the top, bottom, left, or right margins. When you are finished, click **OK** to save your changes and exit. Click **Cancel** to exit without saving your changes. To restore your margin settings to the default system margins (½"), click the **Default** button.
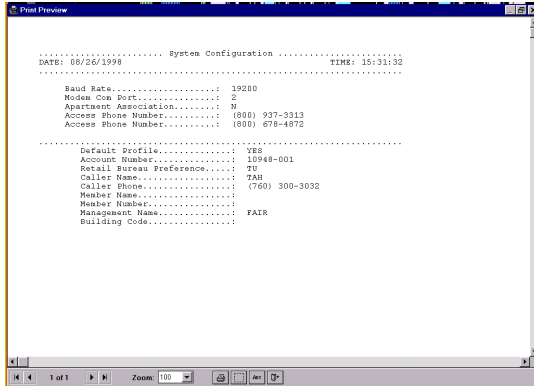
Click on this icon to select a different font for your report.

Click on this icon to close the *report* window and return to **TCC**.

9.5   System Configuration Report

The *System Configuration* report lists the current system
configuration, including bureau preferences, modem baud
rate, access phone numbers, etc.

The current page number of the report is shown on the
report tool bar, at the bottom of the window.

Additional functions can also be selected from the tool bar.

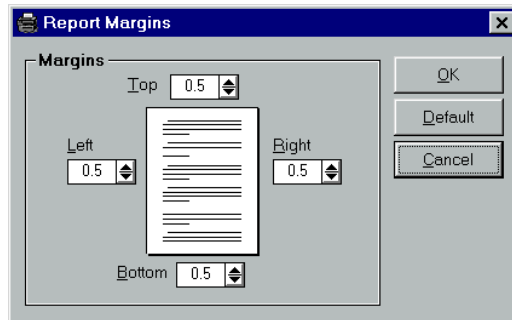|	
[◄]	Click this icon to move to the beginning of the report file.
[◄]	Click this icon to move one page to the left in the report file.
[►]	Click this icon to move to the end of the report file.
[►]	Click this icon to move one page to the right in the report file.
Zoom: 100	Use the *Zoom* drop down text box to enlarge or reduce the size of the displayed report. You can use the Scroll Bar at the bottom of the screen to move "left" or "right" to see more of the report.
[printer]	Click on the printer icon to print the report on your default printer.

Click this icon to adjust the margins for your printed report.

Report Margins

Margins

Top 0.5

Left
0.5

Right
0.5

Bottom 0.5

OK

Default

Cancel

Use the margin windows to adjust the top, bottom, left, or right margins. When you are finished, click *OK* to save your changes and exit. Click *Cancel* to exit without saving your changes. To restore your margin settings to the default system margins (½"), click the *Default* button.

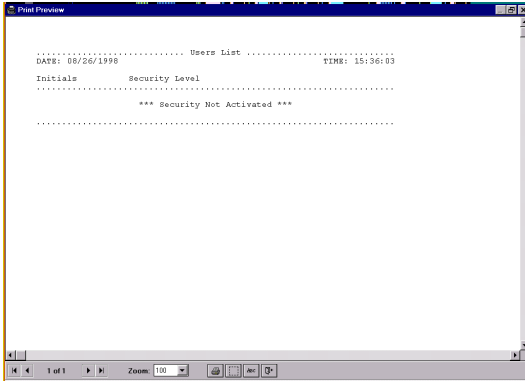Click on this icon to select a different font for your report.

Click on this icon to close the *report* window and return to **TCC**.

9.6   Users List Report

The *Users List* report lists the users setup to use **TCC** *for Windows*. This report is available only when Security is activated.

The current page number of the report is shown on the report tool bar, at the bottom of the window.

Additional functions can also be selected from the tool bar.

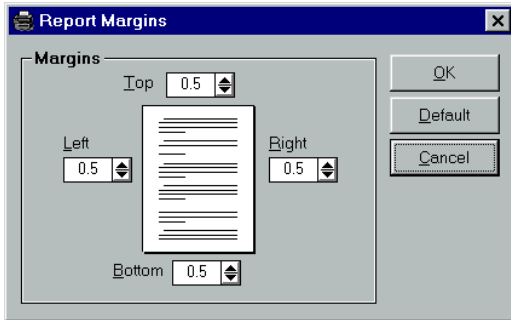|	
◄	Click this icon to move to the beginning of the report file.
◄	Click this icon to move one page to the left in the report file.
►|	Click this icon to move to the end of the report file.
►	Click this icon to move one page to the right in the report file.
Zoom: 100	Use the *Zoom* drop down text box to enlarge or reduce the size of the displayed report. You can use the Scroll Bar at the bottom of the screen to move "left" or "right" to see more of the report.
🖨	Click on the printer icon to print the report on your default printer.

Click this icon to adjust the margins for your printed report.

Report Margins

Margins

Top [0.5 ⬍]

Left
[0.5 ⬍]

Right
[0.5 ⬍]

Bottom [0.5 ⬍]

OK

Default

Cancel

Use the margin windows to adjust the top, bottom, left, or right margins. When you are finished, click *OK* to save your changes and exit. Click *Cancel* to exit without saving your changes. To restore your margin settings to the default system margins (½"), click the *Default* button.

Click on this icon to select a different font for your report.

Click on this icon to close the *report* window and return to **TCC**.

10 Working with Forms

The **TCC** forms are designed to incorporate numerous standard spreadsheet features. These features assist in data entry, viewing, and formatting tasks. The *Applicant* window is a **TCC** form. Use the following procedures to:

♦ Resize Rows
♦ Resize Columns
♦ Collapse and Expand Columns
♦ Move Columns
♦ Lock Columns

10.1 Resizing Rows

To change the row height:

1. Position the cursor in the row header at the far left of the window.

2. Move the cursor to the line between the rows. The cursor shape changes to .

3. Click and hold down the left mouse button.

4. Drag the row to the desired width. All the rows in the form automatically change to the adjusted size.

10.2 Resizing Columns

To change the column width:

1. Position the cursor in the column heading you want to resize.

2. Move the cursor to the line between the columns. The cursor shape changes to .

3. Click and hold down the left mouse button.

4. Drag the column to the desired width.

10.3 Collapsing and Expanding Columns

At times you may want to collapse a column so you can view other columns more easily.

To collapse a column, right-click on the column heading.

To expand a column, right-click again on the collapsed column heading.

10.4 Moving Columns

Column positions can be changed using the drag and drop feature. To move a column:

1. Position the cursor in the column heading you want to move.

2. Click and hold down the *left* mouse button.

3. Drag the column to the new position and release the mouse button.

Another way to change the position of a column is to:

1. Position the cursor in the column heading.

2. Click the left mouse button. An arrow appears on the right side of the heading.

3. Click on the arrow to display a list of columns currently available in the form.

4. Click on the column you want to appear in the current column position. The selected column and the current column change positions.

When you exit the window, the column position is saved.

10.5 Column Locking

Depending on the number of columns in a form and the width of the columns, it may be necessary to scroll the form to view all of the data. As you scroll to the right, the column(s) on the left of the window are no longer visible.

TCC *for Windows* provides a Column Locking feature that allows the "locked" columns to remain fixed and visible as you scroll to the right.

To lock a column or multiple columns:

1. Position the cursor between the row heading and the first column. The cursor changes to ⬌.

2. Click the left mouse button and drag the locking bar to the desired column.

3. Release the mouse button. The column(s) to the left of the locking bar remain fixed when scrolling.