

Lake Shore Central School District

Instructions for Placing Central Store Orders in WinCap WEB

**(for Teachers & Other Instructional
Staff and Head/Sr. Custodians)**



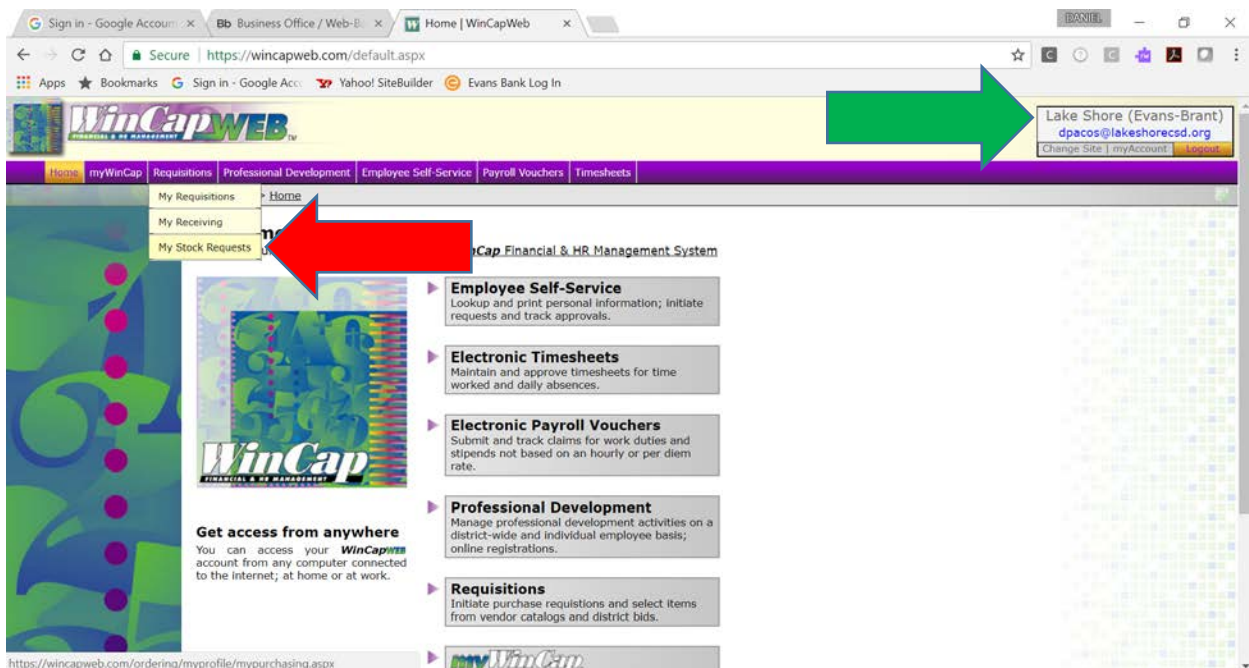
June 2018

Getting Started

Beginning July 1, 2017 The District will no longer be using our existing online program for Central Store Orders. We are moving our Central Store functions into WinCap WEB. The process for placing Central Store Orders (called “Stock Orders” in WinCap WEB) will be very similar to submitting your Budget Requisitions in WinCap WEB.

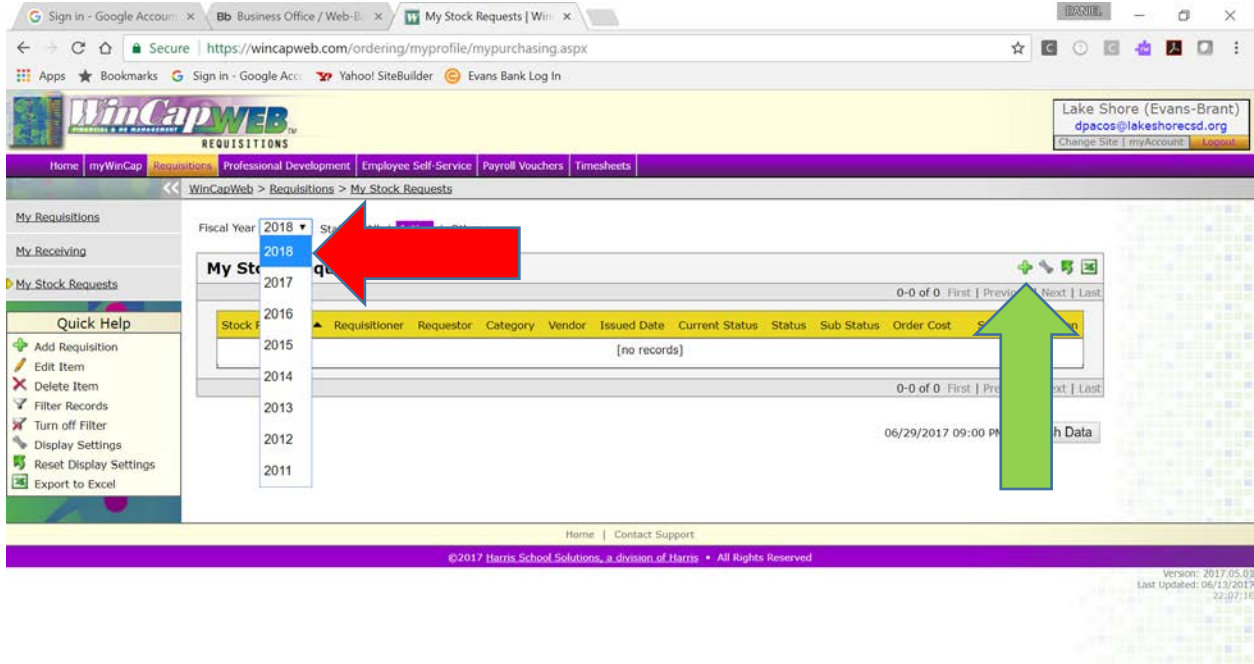
Since WinCap WEB is a web-based program, you will now have the ability to place Stock Orders through WinCap WEB remotely. If you would like to place Stock Orders from home, you will now have that capability.

To begin the process of placing an order in WinCap WEB, log into the program.



When you log in and see the Main Menu screen, the first thing you should do is check to make sure that you have your site set to “Lake Shore (Evans-Brant)” (see the green arrow at the top of the picture above. If your site is listed as anything other than “Lake Shore (Evans-Brant)”, click on the words “Change Site” under your e mail address, and select “Lake Shore (Evans-Brant)” from the drop down list. Once you have the site set correctly, hover over the word “Requisitions” on the top tool bar, and select “My Stock Requests” from the drop down menu (see the red arrow on the picture above). *Remember, Central Store orders are called

“Stock Requests” in WinCap WEB, so selecting “My Stock Requests” will take you to your Central Store orders. You will then see this screen:



The next thing you need to do is make sure that the Fiscal Year is set to “2018”. Click on the year shown in the box, and select “2018” from the drop down menu.

Once you are in the 2018 fiscal year, you are ready to add a new stock order. Click on the little green plus sign on the tool bar on the top right side of the screen (see the green arrow on the picture above). You will then see this screen:

*If you did not request a budget allocation for Central Store from your principal or supervisor, you will not be able to place orders. If this happens, **DO NOT CALL OUR TECHNOLOGY DEPARTMENT FOR HELP.** You will need to request an allocation of money from your building principal or supervisor. As always, contact the business office if you need assistance.

Leave the two boxes on the top (“Stock Request #” and “Other Reference”) blank. The first box you need to fill in is the “Requisitioner” box. Click on the word “select” to the right of the box (see the red arrow on the previous page), and select your name from the drop down menu. *Teachers will see multiple choices – just like you will when you submit your Budget Requisitions. When submitting a Stock Request, you can only use your normal requisitioner – the one that has your first initial and last name (not the one the ends in a “T” – that’s for Technology). If you select the wrong requisitioner you won’t be able to place your order! When you select the requisitioner, the program should fill in the

“Requestor” on the screen. The requestor should be your building principal or your supervisor. If the wrong name is shown, click on the word “select” again and select the correct requisitioner. If you cannot get the correct requestor to appear, call the Business Office.

Now select a category. Click on the word “Select” next to the category box. If you are ordering normal classroom supplies, select “GOES” (General Office and Classroom Supplies). If you want art materials, select “Art”, etc.

Once you have those fields filled in, it’s time to select the items that you want to order. To get to the Line Item screen, click on the “Line Items” tab (see below):

My Stock Request Form

Fiscal Year

Stock Request# Other Reference

Information **Line Items** History Instructions Attachments User Activity Request

Stock Request Information

Requisitioner PACOS\ DANIEL [select][clear]

Requestor DAN PACOS

Deliver to:

Category [select][clear]

Instructions/Notes for Internal Processing

You will then see the “Line Item Screen” (see below).




My Stock Request Form

Fiscal Year

Stock Request# Other Reference

Information **Line Items** History Instructions Attachments User Activity Request

Stock Request Line Items

Line Items + Catalog   

0-0 of 0 First | Previous | Next | Last

Line ▲	Item ID	Description	Catalog#	Quantity	Unit of Measure	Unit Cost	Extended Cost	Action
[no records]								

0-0 of 0 First | Previous | Next | Last

Default Budget Account For New Line Items - MATERIALS & SUPPLIES [search] [select][clear]

Reset/Replace Budget Account For all Line Items [search] [select][clear] Apply

Submit Save for Later Cancel

To enter your items, click on the purple button with the green plus sign and the word “Catalog” (see the red arrow in the picture on the previous page).

You will then see this “pop-up screen”:

Stock Request Item Catalog

Category

Sub Category

Only show items with quantity

Catalog Items

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Item ▲	Description	Catalog#	Quantity	Unit of Measure	Unit Cost
000012	BATTERY: 9 Volt, each REF # EVE-EN22, EATON OFFICE (12)	EVE-EN22	<input type="text"/>	Each	0.9800
000013	BATTERY: AA Penlight, Industrial energizer or equiv	EVE-EN91	<input type="text"/>	Each	0.2100
000014	BATTERY: AA Nickel Metal Hydride rechargeable	DUR-DX1500R4	<input type="text"/>	Each	3.3300
000015	BATTERY: AAA, Industrial energizer or equiv.	EVE-EN92	<input type="text"/>	Each	0.2200
000016	BATTERY: C CELL, Industrial Energizer or equiv	EVE-EN93	<input type="text"/>	Each	0.4600
000017	BATTERY: D Cell, Industrial Energizer or equiv.	EVE-EN95	<input type="text"/>	Each	0.6900
000018	BLOTTER: Desk, 24x19" BLACK with leatherette corners	118817	<input type="text"/>	Each	2.2800
000019	BLOTTER: Desk, GREEN 24x19" desk, 80lb. 25/PK	11930H	<input type="text"/>	Each	0.4400
000020	BOOKENDS: Approx 5"Hx4-1/2" w/nonskid base, baked enamel finish that will not chip or rust	120904	<input type="text"/>	Pair	1.7500
000021	BOOKENDS: Approx. 9"Hx6" w/nonskid base, baked enamel finish that will not chip or rust.	9BENS	<input type="text"/>	Pair	1.9900

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If you leave the “Category” on the top left corner of the screen blank (see the red arrow in the picture above), you will see EVERY item in the Central Store. If you want to narrow your search down, you can click on the word “select” (by the red arrow in the picture above), and select the category you want form the drop down list.

The Categories are:

ART – various art supplies

H/S ART – art supplies for use by High School Art Teachers only

CUSTODIAL – custodial & maintenance supplies

GOES – general office & educational (classroom) supplies

HEALTH – health supplies

RESTRICTED – items for use by building principals only

TONER\INK – printer supplies

*You may see some different categories in the drop down list that are used when the District completes its bidding process. If you select one of those categories, you will not see any items that you can order, so stick with the categories listed above or leave the “Category” box blank.

The other thing to note is that this screen can list items by Item ID #, or by the Item Description. The picture on the last page is sorted by Item ID #. Most employees won’t know the Item ID # of the item you want, so we would suggest sorting the items by description. To sort the items by item description, click on the word “Description” (see the green arrow in the picture on the previous page). You will then see the items sorted by the Item Description , as shown on the next page:

Stock Request Item Catalog

Category [select][clear]
 Sub Category [select][clear]
 Only show items with quantity

Catalog Items [Go To] [Refresh] [Print]

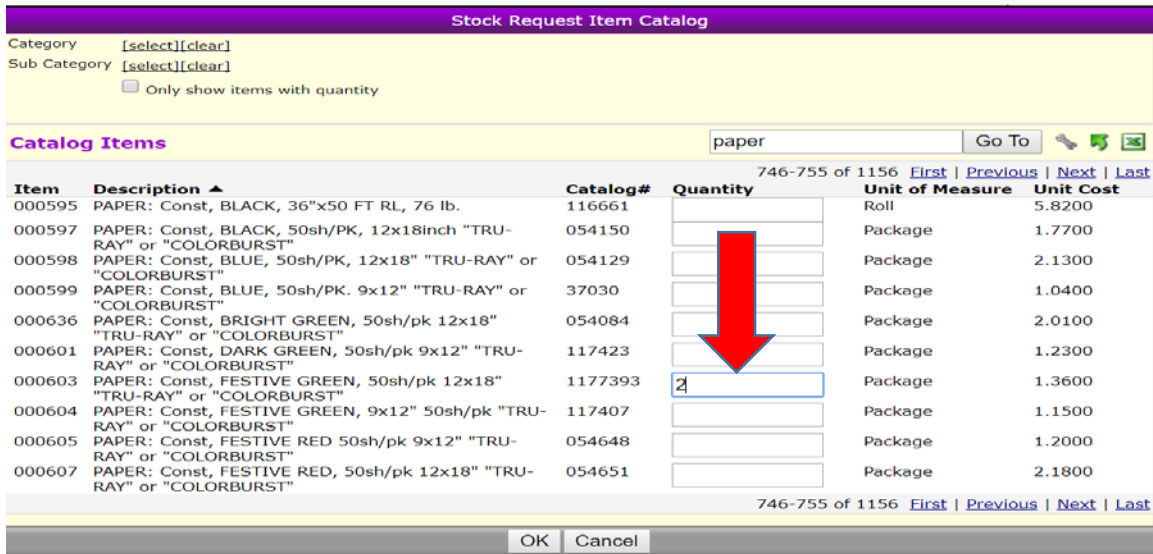
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Item	Description ▲	Catalog#	Quantity	Unit of Measure	Unit Cost
001556	ADHESIVE TAPE: 1"x10 yds, Zonas porous, speed pak plain, 12 rls/BX (Pro Formula acceptable)	08215	<input type="text"/>	Roll	0.9600
001555	ADHESIVE TAPE: 1/2"x10yds, Zonas porous, plain, 24 rls/cs.	25891	<input type="text"/>	Roll	0.4900
001559	ADHESIVE TAPE: Blenderm 1/2"x5 yds, surgical tape, 3M, clear, 24 rls/BX	08632	<input type="text"/>	Roll	0.5000
000756	AMMONIA : 8HG / CS	AVS AMMONIA	<input type="text"/>	Hafl Gallon	0.8900
001560	ANTISEPTIC SOAP: Betadine 16 oz. surgical scrub (Purdue & Frederick) 16 oz. WITH PUMP	68241	<input type="text"/>	BOTTLE	1.7400
001563	ANTISEPTIC WIPES: Benzalconim Chloride Antiseptic towelette, 100/bx, individually wrapped	317542	<input type="text"/>	Box	1.5000
001564	APPLICATORS: 6" cotton tipped, 100/pk	99306	<input type="text"/>	Package	0.3000
001565	APPLICATORS: Pediculosis Sticks, (to check for lice) Plain hardwood, Approximately 6x1/4x1/2", 1000/BX	65960	<input type="text"/>	Box	1.5000
001572	BAND AIDS: Ex. Large, 2x4-1/2", Plastic, clear, sterile, 50/BX, J&J or equivalent	88831	<input type="text"/>	Box	2.5000
001573	BAND AIDS: Fingertip, large, plastic, clear, sterile, 2-5/8x2-1/2", 100/BX, J&J or equivalent	A32-117	<input type="text"/>	Box	2.5000

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OK Cancel

Let's say you want to order some green construction paper. You can narrow your search by entering a key word in the "Go To" box (see the red arrow in the picture above). If you type in the word "paper" and click the "Go To" button, your screen will filter out all items that do not have the word "paper" in the description. Now all you need to do is look down through the list to find your green construction paper. If its not on the first screen, click on the word "Next" on the bottom right side of the screen (see the green arrow in the picture above).



In the example on the previous page, we entered the word "paper" in the search box, clicked on the "Go To" button, and searched through the screens to find "Festive Green" 9" x 12" construction paper. We entered a "2" in the quantity box because we want to order 2 packages. In this example we also want to order some watercolor paint sets. We typed the word "paint" into the search box, clicked on the "Go To" button, and searched through the items until we found the watercolor paint sets that we want to order (see the screen below).

Category

Sub Category

Only show items with quantity

Catalog Items

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Item	Description ▲	Catalog#	Quantity	Unit of Measure	Unit Cost
001188	PAINT SUPPLY: Wire Brush	01709	<input type="text"/>	Each	2.2900
001440	PAINT: 16/st Prang Watercolor, semi-moist half pans, rectangular - 16 ST w/#7brush. Must be "Prang" rectangular to accomodate our replacement paints. PLEASE SEND SAMPLES !	182626	<input type="text" value="15"/>	Set	3.7900
001441	PAINT: Blickylic, BURNT UMBER, PT, non-toxic, dries quickly to a permanent waterproof and semi-GAoss finish. Blickylic ONLY	B00711-8056	<input type="text"/>	Pint	3.0700
001442	PAINT: Blickylic, CHROME ORANGE, PT, non-toxic, dries quickly to a permanent, waterproof and semi-GAoss finish, Blickylic ONLY	B00711-4666	<input type="text"/>	Pint	3.0700
001443	PAINT: Blickylic, CHROME YELLOW, PT, non-toxic, dries quickly to a permanent, waterproof and semi-GAoss finish. Blickylic ONLY	B00711-4156	<input type="text"/>	Pint	3.0700
001444	PAINT: Blickylic, COBALT BLUE, PT, non-toxic, dries quickly to a permanent waterproof and semi-GAoss finish. Blickylic ONLY	B00711-5186	<input type="text"/>	Pint	3.0700
001445	PAINT: Blickylic, FIRE RED, PT, non-toxic dries quickly to a permanent, waterproof and semi-GAoss finish. Blickylic ONLY	B00711-3116	<input type="text"/>	Pint	3.0700
001446	PAINT: Blickylic, GREEN OXIDE, PT, non-toxic dries quickly to a permanent, waterproof and semi-GAoss finish. Blickylic ONLY	B00711-7296	<input type="text"/>	Pint	3.0700
001447	PAINT: Blickylic, MAGENTA, PT, non-toxic dries quickly to a permanent waterproof, and semi-GAoss finish. Blickylic ONLY	B00711-3046	<input type="text"/>	Pint	3.0700
001448	PAINT: Blickylic, MARS BLACK, 1/2 GA, non-toxic dries quickly to a permanent, waterproof and semi-GAoss finish. Blickylic ONLY	B00711-2048	<input type="text"/>	Half Gallon	11.6500

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You can continue to do the same thing to add all of the items that you want to include in your order. When you are all set, click on the “OK” button at the bottom of the screen (see the red arrow in the picture above).

The program will save your items, and return you to the order screen, shown on the next page.

My Stock Request Form

Fiscal Year 2018
 Stock Request# Other Reference

Information | **Line Items** | History | Instructions | Attachments | User Activity Request

Stock Request Line Items

Line Items + Catalog

Line	Item ID	Description	Catalog#	Quantity	Unit of Measure	Unit Cost	Extended Cost	Action
1	000603	PAPER: Const, FESTIVE GREEN, 50sh/pk 12x18" "TRU-RAY" or "COLORBURST"	1177393	2.00	Package	1.3600	2.72	
2	001440	PAINT: 16/st Prang Watercolor, semi-moist half pans, rectangular - 16 ST w/# 7brush. Must be "Prang" rectangular to acomadate our replacement paints. PLEASE SEND SAMPLES !	182626	15.00	Set	3.7900	56.85	

1-2 of 2 First | Previous | Next | Last

Default Budget Account For New Line Items: 1310-450-00-0000 - MATERIALS & SUPPLIES [search] [select] [clear]

Reset/Replace Budget Account For all Line Items: - [search] [select] [clear] Apply

Submit | Save for Later | Cancel

The last thing you need to do before submitting your order is correct the budget code for us. The program defaults to the budget code for outside supply & materials orders. Please click on the word “select” to the right of the Default Budget Account shown above (see the red arrow in the picture above). You will then see a pop-up window like this appear:

Select Budget Code

Budget Codes

Budget Account	Description	Fund	Unencumbered Balance	Available Balance
1310-400-00-0000	CONTRACTUAL AND OTHER	A	441.00	441.00
1310-403-00-0000	CONTRACT EXPENSE, REPAIRS	A	7074.90	7074.90
1310-450-00-0000	MATERIALS & SUPPLIES	A	3175.00	3175.00
2110-451-25-0000	CENTRAL STORE-MATERIAL &	A	71311.92	42629.78

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Cancel

When this happens, click on the budget code that has “451” in it (see the red arrow in the picture above). The program will the correct the budget code to the budget code for Central Store orders. *If you don’t happen to have a budget code with a “451” in it, select the account that has “450” in it.



You will then be returned to the order screen. It’s a good idea to double check the screen one last time to make sure everything is correct.





My Stock Request Form

Fiscal Year 2018
 Stock Request# Other Reference

Information | **Line Items** | History | Instructions | Attachments | User Activity Request

Stock Request Line Items



Line Items + Catalog  

Line	Item ID	Description	Catalog#	Quantity	Unit of Measure	Unit Cost	Extended Cost	Action
1	000603	PAPER: Const, FESTIVE GREEN, 50sh/pk 12x18" "TRU-RAY" or "COLORBURST"	1177393	2.00	Package	1.3600	2.72	 
2	001440	PAINT: 16/st Prang Watercolor, semi-moist half pans, rectangular - 16 ST w/#7brush. Must be "Prang" rectangular to acomadate our replacement paints. PLEASE SEND SAMPLES !	182626	15.00	Set	3.7900	56.85	 

1-2 of 2 First | Previous | Next | Last

1-2 of 2 First | Previous | Next | Last

Default Budget Account For New Line Items 2110-451-25-0000 - CENTRAL STORE-MATERIAL & [search] [select] [clear]
 Reset/Replace Budget Account For all Line Items - [search] [select] [clear] Apply

Submit Save for Later Cancel

You aren't done just yet!

Remember to either save your Stock Order Request (if you want to come back in later and add items or change anything on the order), or submit the order if it is complete and you don't need to make any changes (see the red & green arrows in the picture above). Your order will not proceed to your supervisor for approval until you "Submit" it, and if you exit out of the program without either clicking "Save for Later" or "Submit", your order will be lost and you'll have to start the process all over again.

Once you have submitted your order, you are all done. Once you are returned to the main WinCap WEB screen, click on the words "Log Out" on the top right corner of your screen and you will exit the program.

At any time, you can return to your "My Stock Orders" screen to check on the status of your order.

*Please note – if you order items that are out of stock in Central Store, or if you order more of a particular item than we have in stock in Central Store, the program will ship you what we have in stock and automatically fill the order when the remaining items are received into inventory by the Central Store Clerks.

Last, if your order exceeds the amount of your budget allocation for Central Store, you will receive an error message and you will not be able to submit your order. In this case, reduce the order down until you are within your budget allocation and then you will be able to submit it for processing.

If there is a subsequent problem with an order:

If when you receive your order you realize that there is a problem with the order- maybe you ordered too many of an item (the unit of measure was “dozen”, and you ordered 12 thinking the unit of measure was “each”, so you received 144 of that item instead of 12). You may return the item to the Central Store – just make sure you provide the Central Store Clerks with a copy of the order receipt that they sent you with the order. In order to credit your account and check those excess items back into inventory, they will need your Stock Request Number (it’ll be the number that is labelled “SRQ-XXXXX”). *If you didn’t order enough of an item in your order, you can’t change the order once it has been filled & shipped by the Central Store Clerks. In this case you will need to submit another order for these remaining items.

As always, please contact the Business Office with any questions or problems.