

Ordering From a Vendor NOT on the Bid List

1. Log in to www.wincapweb.com- your password contains a capital letter and a symbol. If you do not know your password, click Forgot Password to reset it.



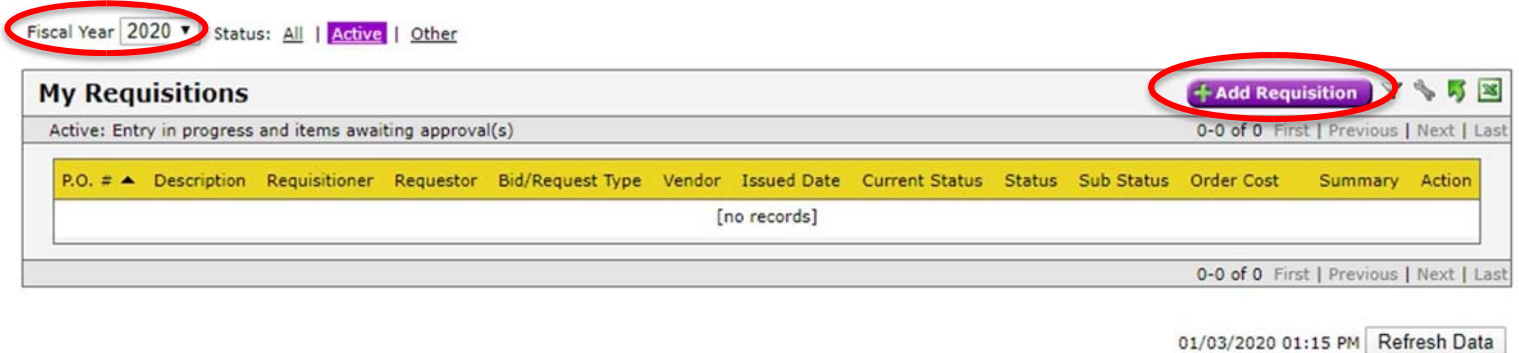
The image shows the WinCapWEB login page. At the top, there is a navigation bar with 'Home', 'Requisitions', and 'Professional Development'. Below this is a 'myWinCap' login box containing a 'Username (email):' field with the value 'kmceachin@newp', a 'Password:' field with masked characters, a 'Login' button, and a 'Forgot Password?' link. The text 'Your session has' is partially visible to the right of the login box.

4. Go to Requisitions, then My Requisitions



5. Make sure you are in the correct Fiscal Year. Orders entered prior to June 30th should be entered into the current fiscal year. Those entered after June 30th will be in the next fiscal year.

6. Click Add Requisition



The image shows the 'My Requisitions' page. At the top, there is a 'Fiscal Year' dropdown menu set to '2020', which is circled in red. To its right are 'Status: All | Active | Other' links. The main heading is 'My Requisitions' with a '+ Add Requisition' button circled in red. Below the heading is a sub-heading 'Active: Entry in progress and items awaiting approval(s)' and a status indicator '0-0 of 0'. A table with columns 'P.O. #', 'Description', 'Requisitioner', 'Requestor', 'Bid/Request Type', 'Vendor', 'Issued Date', 'Current Status', 'Status', 'Sub Status', 'Order Cost', 'Summary', and 'Action' is shown, with '[no records]' in the center. At the bottom right, there is a timestamp '01/03/2020 01:15 PM' and a 'Refresh Data' button.

7. Next to the space for Vendor, click on Search

My Requisition Form

Fiscal Year 2020
Purchase Order# Other Reference
PO Description

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

Requisition Information

Requisitioner	<input type="text"/>	<input type="text"/> [select][clear]
Requestor	HS	High School Principal
Location	20	High School
Department	<input type="text"/>	<input type="text"/>
Bid/Request Type	<input type="text"/>	[select][clear]
Vendor	<input type="text"/>	[search] [select][clear]

8. Choose your vendor. If your vendor does not appear in the list, stop here. Send the name and address of the vendor to Tina Long in the Business Office and request that she add it to Wincap. You must wait for your vendor to be added before continuing.

9. Click on Line Items

My Requisition Form

Fiscal Year 2020
Purchase Order# Other Reference
PO Description

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

Requisition Information

Requisitioner	<input type="text"/>	<input type="text"/> [select][clear]
Requestor	HS	High School Principal
Location	20	High School
Department	<input type="text"/>	<input type="text"/>
Bid/Request Type	<input type="text"/>	[select][clear]
Vendor	<input type="text"/>	[search] [select][clear]

10. Click Add Line Item

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

Requisition Line Items

Line Items **+ Add Line Item**

Line	Description	Catalog#	Quantity	Unit of Measure	Unit Cost	Discount %	Discount	Shipping %	Shipping	Extended Cost	Action
[no records]											

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

11. Enter the details of your order. Enter the item # in the Catalog # field. Enter the item description in the Description field. Complete the quantity and cost sections.

****Note- if you are ordering from Amazon, you must include the ASIN number for each item in the Catalog # field. This can be found by scrolling down the page to the “product information” section. Then copy and paste the entire item description into the Description field.****

Requisition Item

Catalog#	123456	
Description	scotch tape	
Quantity	1	
Unit of Measure	Each (EA)	
Unit Cost	3.00	
Discount 0.00	Discount % 0	OR \$ 0
Shipping 0.00	Shipping % 0	OR \$ 0

(Note: Any changes to discount and shipping will be calculated after clicking OK.)

12. Next to Budget Account, click Select

(Update Current Distributions)

Current Distribution Percentage	0 %
Item Amount	\$ 440.00
Current Distribution	\$ 0.00
Balance to Distribute	\$ 440.00

Budget Account - [search] **[select]** [clear] Add

Requisition Budget Codes

Budget Account	% Distrib	Amount	Available Balance	Unencumbered Balance	Action
[no records]					

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

Use as Default Budget Code(s) for remaining Items.
 Re-apply this distribution to all existing items

OK Cancel

13. Click on the budget code your wish to use.

Select Budget Code					
Budget Codes					
Budget Account	Description	Fund	Unencumbered Balance	Available Balance	
2110-400-20-000-000	CONTRACTUAL - HS	A	1650.18	1426.18	
2110-400-20-UCC-000	ULSTER TUITION, FRP	A	3000.00	3000.00	
2110-450-20-000-000	SUPPLIES - HS	A	49802.76	49033.35	
2110-450-20-PLW-000	SUPPLIES, PLTW, HS	A	1660.19	1660.19	
2110-480-20-000-000	TEXTBOOKS - HS	A	13651.18	13651.18	
2110-480-20-CAL-000	CALCULATORS, HS	A	5.00	5.00	

14. Click Add

Current Distribution Percentage 0 %
 Item Amount \$ 440.00
 Current Distribution \$ 0.00
 Balance to Distribute \$ 440.00

Budget Account 2110-400-20-000-000 - CONTRACTUAL - HS [search] [select] [clear] **Add**

15. The % Distrib. field should say 100. Check the boxes that say “Use as default budget code for remaining items” and “reapply this distribution to all existing items”.

Budget Account - [search] [select] [clear] **Add**

Budget Account	% Distrib	Amount	Available Balance	Unencumbered Balance	Action
2630-450-20-000-000	100.00	3.00	135.69	135.69	X

Use as Default Budget Code(s) for remaining Items.
 Re-apply this distribution to all existing items

OK **Cancel**

16. If there are additional items to enter, click Add Line Item and repeat all steps. You should not have to enter the budget code each time, but double check to be sure it is showing on each item. When you are finished, click Submit.

Requisition Line Items

Line	Description	Catalog#	Quantity	Unit of Measure	Unit Cost	Discount %	Discount	Shipping %	Shipping	Extended Cost	Action
1	Field trip on January 22, 2020 to XXXX for 20 students and 2 chaperones		22.00	Each	20.0000	0.00	0.00	0.00	0.00	440.00	X

Extended Cost 440.00
 Edit Auto Distribute Discount Discount - \$ 0.00
 Edit Auto Distribute Shipping Shipping + \$ 0.00
 Total Cost 440.00

Submit Save for Later Cancel