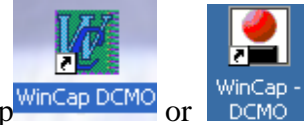


District Directions for On-Line Initial Contracts

Districts should follow the steps below to update their Initial BOCES Service Requests On-line in WinCap. If you have questions or difficulties, please contact Julia Whitney at 607-335-1269 or whitneyj@dcmoboces.com or Doreen Rowe at 607-335-1275 or rowed@dcmoboces.com.


Logging Into WinCap

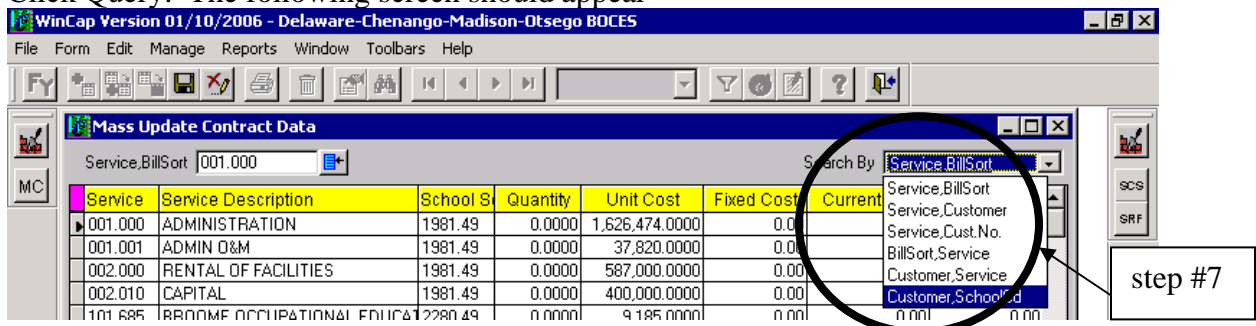


1. Double click your WinCap icon on your desktop to open WinCap
2. A window will appear with your user ID (which should be your first initial followed by your entire last name) and a place for your password. Enter your password (it IS case sensitive), then press enter or click OK.

If at any time you wish to change your password, enter your current password then RIGHT Click on the OK button. You will then be prompted to enter a new password and asked to confirm it.

Update Contract Data for BOCES Services



1. Click the MC icon  on the left toolbar or go to Manage, BOCES Service Contracts, Mass Update Contract data.
2. Change the year to 2010. This (and steps 3-4) will need to be done only the first time you enter the mass update screen for the year. From then on, it should 'remember' the settings you used last time.
3. Change the type of Update to "Initial Contracts (Quantity & Fixed Costs)".
4. Select Fund A.
5. Check that the customer is your district name. If it is not, contact Julia Whitney at 607-335-1269 or whitneyj@dcmoboces.com.
6. Click Query. The following screen should appear



7. Click the drop down arrow in the upper right corner and change the Search By method to Customer, SchoolCd (this will put the BOCES services in school code order).
8. Update Quantities and Fixed Costs as appropriate. The Current Amount column will auto update.

District Directions for On-Line Initial Contracts



Note: You will have the ability to update Quantities and Fixed costs for the following services when doing Initial Contracts only: 001.000, 001.001 (Admin.); 002.000, 002.010 (Capital); 103.000, 103.001 (CTE); 507.000, 507.010, 507.529, 514.000, 520.000, 507.509 (ISS). After January 21st all districts will be locked out of these services and be unable to change the Quantities and Fixed Costs. These are RWADA based services and the 09-10 charge will be determined.

9. Choose the Save  option from the toolbar or select the Undo  option to discard any changes you have made since the last time you saved.

Notes:

- a) The LY Current Column in the Mass Update Contract Data screen shows the services the district is **currently buying**. If this information does not match the district's most recent AS-7 Invoice it is because the BOCES has entered adjustments that will effect the district's next AS-7 invoice.
- b) The Mass Update Contract Data screen shows all billable services the district has the ability to update (including those that they are not currently buying)

Print Completed Initial Service Request Form

1. Click the SRF  icon on the right of your screen or go to Reports, BOCES Service Requests, Service Request Forms
2. Click on the Printing Options tab to verify the screen looks like the one shown below. If it does not, click the blue options  button to the right of the Criteria Name field and select the Shared: Dist Initial SvcReq criteria.

District Directions for On-Line Initial Contracts

Service Request Forms

2010 Criteria Name Shared: Dist Initial SvcReq

Record Selection

Printing Options

Sort Options

Primary Sort by Fund

Components/Non-Components

School District Contract S

Page Break

Other BOCES

Service/District

Show Code

PageBreak

Header Address

Delaware-Chenango-Madison-Otsego BOCES
6678 County Rd. 32
Norwich, NY 13815-3554

Format

Service Request Forms with Rates

Report Title BOCES Initial Service Service Request Form 2009-10

Contact

Header Text

Show RWADA


Footer Text

Other: _____

Show at Sort Page Break

Crystal: <default report>

Print Settings Cancel



3. Click the printer icon to print the report 

****Have Superintendent sign/date Initial Service Request Form and send to the BOCES Treasurer's Office by January 21st. Please keep a copy for your records.****

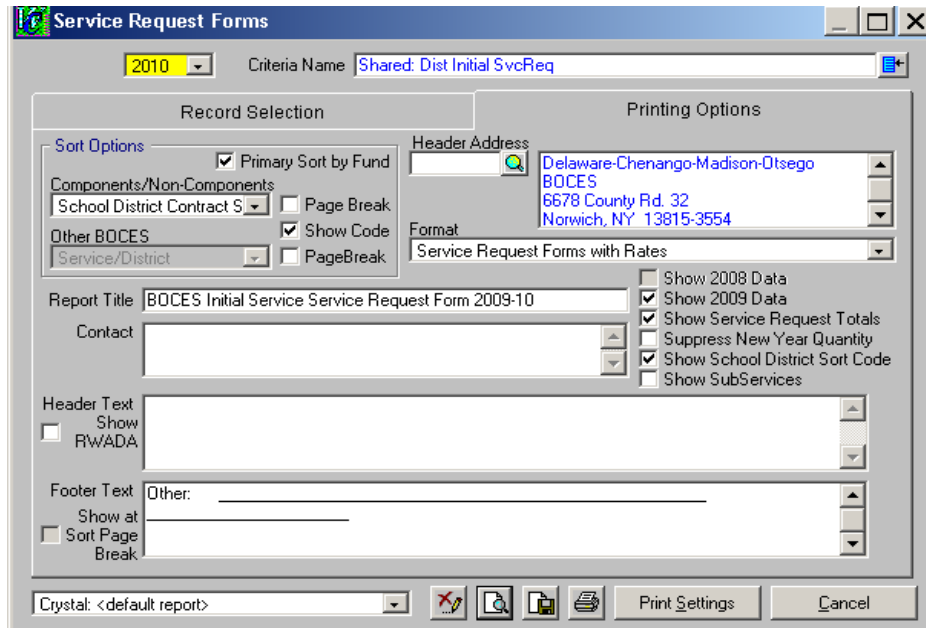
Logging Out of WinCap

1. Go to File on the toolbar menu
2. Select Exit
3. Please do not use the x in the upper right corner to close out of WinCap as this sometimes leaves your session active and connected to the server.

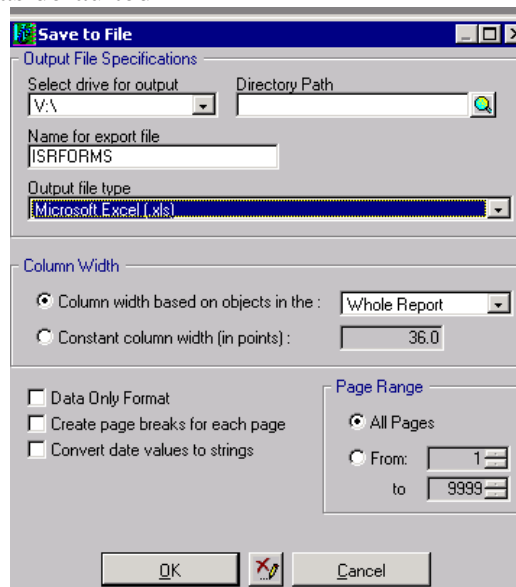
Export Initial Service Request Form into Excel (Optional)

1. Click the SRF  icon on the right of your screen.
2. Select the Save File  icon on the bottom of the report screen

District Directions for On-Line Initial Contracts



3. Select drive for output
 - a. Select V:\ for your hard drive or
 - b. Select A:\ for your floppy drive
 - c. Do NOT use any of the other drives listed. If you do, your file will be placed on the WinCap server at BOCES and you will NOT be able to access it.
4. Select a name for the file-the default name is ISRFORMS
5. Select Output file type of Microsoft Excel (.xls)
6. Leave all other settings as defaulted



7. Click the OK icon to create the file
8. The Save to File window will automatically close when the file is finished exporting.
9. Go to your hard drive or floppy drive and open the file for editing/viewing.