Florida Department of Transportation

Excel Forms Manager User Guide

Excel Forms Manager (1.0.0.29)

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Disclaimer

These instructions are based on the following edition, version, and build of Microsoft Windows and Microsoft Office. The screenshots and steps contained within these instructions may differ from versions otherwise listed. However, versions close to the listed versions SHOULD look and function similarly.

Edition: Windows 10 Enterprise
Version: 20H2
Build: 19042.1586

Edition: Microsoft 365 Apps for enterprise
Version: 16.0.15028.20152

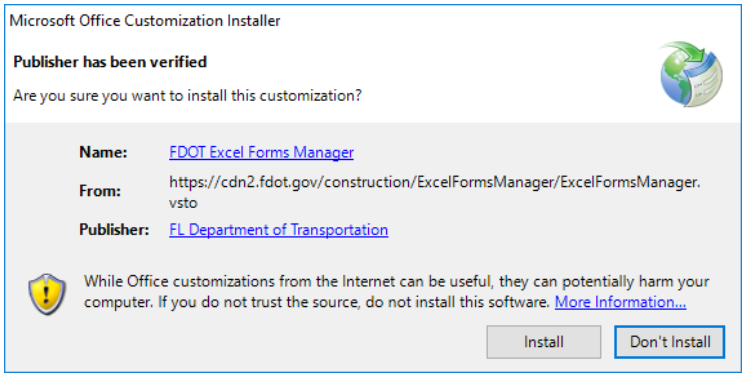
About

Excel Forms Manager is a plugin for Microsoft Excel. It allows for the fast, easy, consistent generation of Excel forms used by the Construction Office of the FDOT. Once a form is chosen, the plugin will acquire all applicable data and then generate and populate the chosen form. At this stage, any fields that need to manually be populated can be filled in. When all fields have been completed, the form can be prepared to sign. The plugin will generate a noneditable version of the form that can be signed and submitted to the FDOT.

Installation

The installation is simple and should not require elevated privileges. Also, it is user account specific, which means it is only installed and available to the user who installed it.

1. To begin, navigate to the Construction Downloads page of the FDOT website.
2. Click on the **FDOT Excel Forms Manager** link. (Note: Run the executable file. Typically, by selecting Run or Open, depending on your browser.)
3. You will be presented with the Microsoft Office Customization Installer window.
   On this screen you can click the name link to visit the relevant webpage or click on the publisher link to verify the authenticity of the plugin.



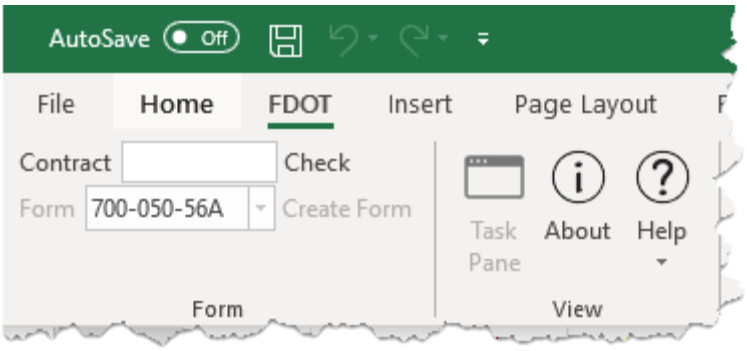
4. Click **Install**. The plugin will download and install the latest available version after which you will be presented with a successfully installed message. If for some reason the installation fails, select **Close** and contact us. See the Contact Us section for contact info.
5. Click the **Close** button to close the window.

Getting Started

Overview of Tab

We will cover how to access the new FDOT tab on the ribbon and what it does.

1. To get started with the FDOT Excel Forms Manager plugin, launch Microsoft Excel. If Excel was open during the installation you will need to close and reopen it.
2. If no workbook is open already, click **New** on the sidebar menu and click on **Blank workbook** in the main pane. This will open a new blank workbook which allows access to the new FDOT ribbon tab. If a workbook is already open, you already have access to this tab.



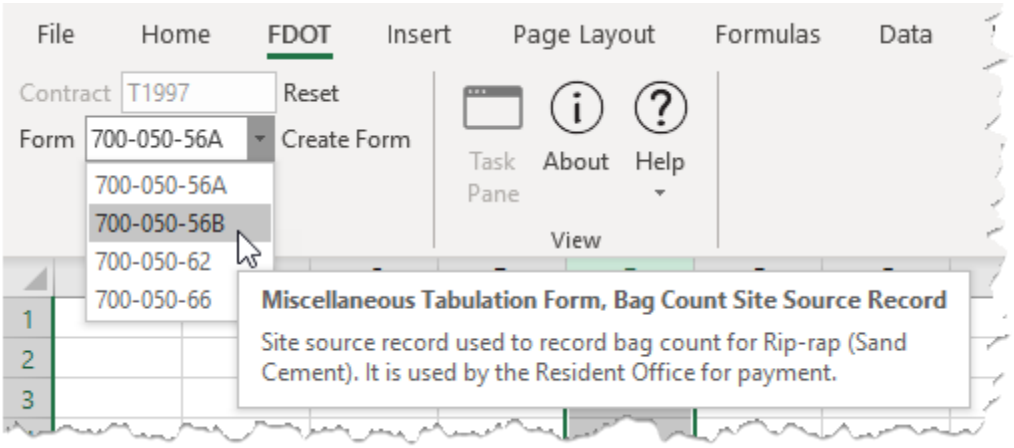
3. On the ribbon, click **FDOT** to activate that tab. This tab has two sections, the Form section and the View section. The Form section is used to enter a contract number, validate it exists, and choose a form to create. The view section is used to show or hide the Task Pane, view the plugin About information, and access Help for the plugin or current form.

Generating a Form

The new FDOT tab allows you to enter a contract number and generate forms for that contract. It will also validate that the entered contract number is a valid contract via Site Manager.

1. To generate a new form, begin by entering a valid contract number into the Contract field and click on **Check**. A status message of *"Checking contract…"* will be displayed above the Contract field while the contract number is verified. This can take a few moments. If you receive a warning or error message, please see the Troubleshooting section for more information. Once the contract number is validated, the Contract field is read-only. If you would like to change the contract number, click **Reset**.

2. Choose a form number from the Form dropdown. To view the title of the form and a short description of what it is used for, hover over the form number and a tool tip will be displayed.



3. Once you have selected a form, click **Create Form** to generate it.
4. You will be prompted to select a location where you would like to save the generated form as well as modify the name of it. Once you choose a location and provide a file name, click **Save**. If you no longer wish to create the form, click **Cancel**.
5. You will now be asked if you would like to close any open workbooks. If you would like to close the stated workbook, click **Yes**, otherwise click **No**. You will be prompted for each workbook that is currently open in that instance of Excel.
6. The task pane specific to the chosen form will now be displayed showing the status of the form being generated. This pane can be shown or hidden by clicking the now enabled **Task Pane** button.

Opening a Form

You can also open a previously generated and saved form. So, if you have a form that you have been working on and saved, you can reopen it at any time. When the form is opened, the plugin will detect the form number and display the correct corresponding task pane. The task pane will only be displayed for forms that are still in the editing state. If it is the sign-able version of the form (meaning the form has been prepared to sign) the task pane will not be displayed. If you try to open more than one editable form at a time you will receive a warning message. For more information, see the Troubleshooting section.

View Plugin Version

If you need the Assembly, File, Publish, or Form version, click the **About** button. If a compatible form is open, its version will be displayed beside Form Version, otherwise N/A will be displayed.

Getting Help

You can easily access this help documentation at any time by clicking on the User Guide link on the Construction Downloads page or you can click the **Help** button. The help documentation for any compatible form can also be accessed similarly by clicking on the User Guide link next to the appropriate form on the Construction Downloads page or by clicking the **Help** dropdown and choosing **Form Help** from the menu.

Troubleshooting

- **I get a warning when checking the contract number that says, "The contract number is too short."**
  The contract number must be at least 5 characters in length. Make sure the contract number you are entering meets this requirement.

- **I get an error when checking the contract number that says, "Data for the selected contract could not be retrieved. It may not exist, or the service may have failed."**
  This message can be displayed for a couple of reasons. The contract number that was entered may not exist in Site Manager or the plugin may have failed to retrieve the data from the server. Double check the contract number that was entered and make sure it is valid. If the contract number is valid, wait a few seconds and try to check the contract number again. The server may have failed to respond in time due to multiple requests at that time.

- **I get an error when checking the contract number that says, "Data for the selected contract could not be retrieved. Verify you have an active internet connection."**
  This message is generally received when you do not have an active internet connection. Verify you have an active internet connection and can access the internet. It is also possible that the server is either temporarily unreachable or offline.

- **I get a warning when trying to open more than one form that says, "Only one open form per instance of Excel is allowed. See help for more details."**
  By design, the ribbon bar is shared across all open workbooks. In order to open more than one form, each form needs to run in its own Excel instance. To accomplish this, make sure one form is already open in an instance of Excel. Next, while holding down the ALT key, double click on your Excel shortcut and continue holding the ALT key until you get a popup. In the popup that asks, *"Do you want to start a new instance of Excel?"*, click **Yes**. In the newly opened instance of Excel, click **Open** from the side menu and choose the second form you want to open or use the FDOT ribbon tab to generate a new form.

- **I have downloaded and used the plugin in the past, but now it no longer shows in the Excel ribbon. If I try to download and install the plugin again, I am informed that it is already installed.**
  The plugin is still installed; however, it has been disabled for one reason or another. To re-enable the plugin, take the following steps. Open Excel: if Excel is already open, click **File**. From here, click **Options** in the bottom left corner. In the *Excel Options* window choose **Add-ins** from the left menu. At the bottom of the *Excel Options* window choose **COM Add-ins** from the *Manage* drop-down and click **Go**. In the *COM Add-ins* window check the box by *FDOT Excel Forms Manager* and click **OK**. The plugin should now be displayed in the Excel ribbon.

Updates

Application (listed as Publish in the about information) versions along with the date and any changes are listed below for your convenience.

Version 1.0.0.3 - (03/16/2020)
No updates, this is the initial version.

Version 1.0.0.6 - (04/04/2020)
Updated Form 700-050-56B to version 1.0.0.1.

Version 1.0.0.7 - (04/14/2020)
Changed how application handled User Guide links.

Version 1.0.0.11 - (04/28/2020)
Added Summary worksheet to Form 700-050-56A and Form 700-050-56B.

Version 1.0.0.13 - (08/25/2020)
Resolved logic issue in Form 700-050-56A and Form 700-050-56B where form may fail to be created for contracts with multiple projects.

Version 1.0.0.14 - (09/18/2020)
Added Form 700-050-62.

Version 1.0.0.16 - (10/26/2020)
Fixed logic issue in Form 700-050-62 where cutoff periods was being calculated incorrectly.

Version 1.0.0.17 - (11/02/2020)
Fixed logic issue in Form 700-050-62 where the correct number of pages was not being generated causing all pay items no to be shown. The decimal precision for input was also changed from 2 to 3 places.

Version 1.0.0.19 - (11/10/2020)
Fixed code error in Form 700-050-62 that caused incorrect, missing, or duplicated pay items when generating forms.

Version 1.0.0.20 - (01/19/2021)
Fixed issue in Form 700-050-62 that caused pay item 0102 74 8 to not be populated on the form.

Version 1.0.0.21 - (06/30/2021)
Fixed issue in Form 700-050-56A were Summary worksheet truncated decimals.

Version 1.0.0.22 - (04/21/2022)
Upgraded form 700-050-56B to allow pay item 0530-1100 and form 700-050-62 to allow pay item 0102-78. Fixed issue with all forms being saved to OneDrive. Added more descriptive error messages to forms.

Version 1.0.0.23 - (07/19/2022)
Small code revision.

Version 1.0.0.24 - (07/26/2022)
Fixed issue in forms 700-050-56A and 500-050-56B with the Calculate Summary function.

Version 1.0.0.25 - (09/12/2022)
Updated to work with the new PrC system.

Version 1.0.0.26 - (09/22/2022)
On form 700-050-62 excluded pay item 0102 1 and fixed issue with incorrect unit types for certain pay items.

Version 1.0.0.27 - (09/22/2022)
On form 700-050-62 fixed issue with service failing to return pay items.

Version 1.0.0.28 - (10/12/2022)
Changed the logic of forms 700-050-56A, 700-050-56B, and 700-050-62 for when a contract contained projects with no pay items.

Version 1.0.0.29 - (06/19/2023)
Added exception logging to help diagnose problems with the application.

Contact Us

If you need additional help or are experiencing issues you can email CO-SCO-SystemSection@dot.state.fl.us.