SIMPLE INSTRUCTIONS
FORMS IN WORD ACCESS DATABASE FOR THE SF330

We have created a simple database in Microsoft Access to help companies track their projects, employees and subconsultants for the new SF330 form. This database is not locked or secure. This means that you can edit, add, or delete fields, as well as change the look of your reports. **The database will not create or print the form for you. Information retrieved through queries and reports can be cut and paste directly into your SF330 Word document!**

This database will do everything that you need it to do for compiling your company information and filling out the new SF330. The best part is that it can be changed and tailored for your specific needs. Following are a few simple instructions that should help you fully use the program in the next few pages. If you have any questions or would like some assistance, please e-mail (forms@formsinword.com) or call (907-745-5674) our office.

MAIN SWITCHBOARD
The Main Switchboard will appear in the first screen after you have opened the SF330 database. Use the switchboard to quickly add or edit project, employee, subconsultant, and client data.

DELETING RECORDS
From the toolbar select edit, delete record.

SORT
Use the toolbar to select records, sort for ascending or descending sort.

QUICKLY LOCATING RECORDS
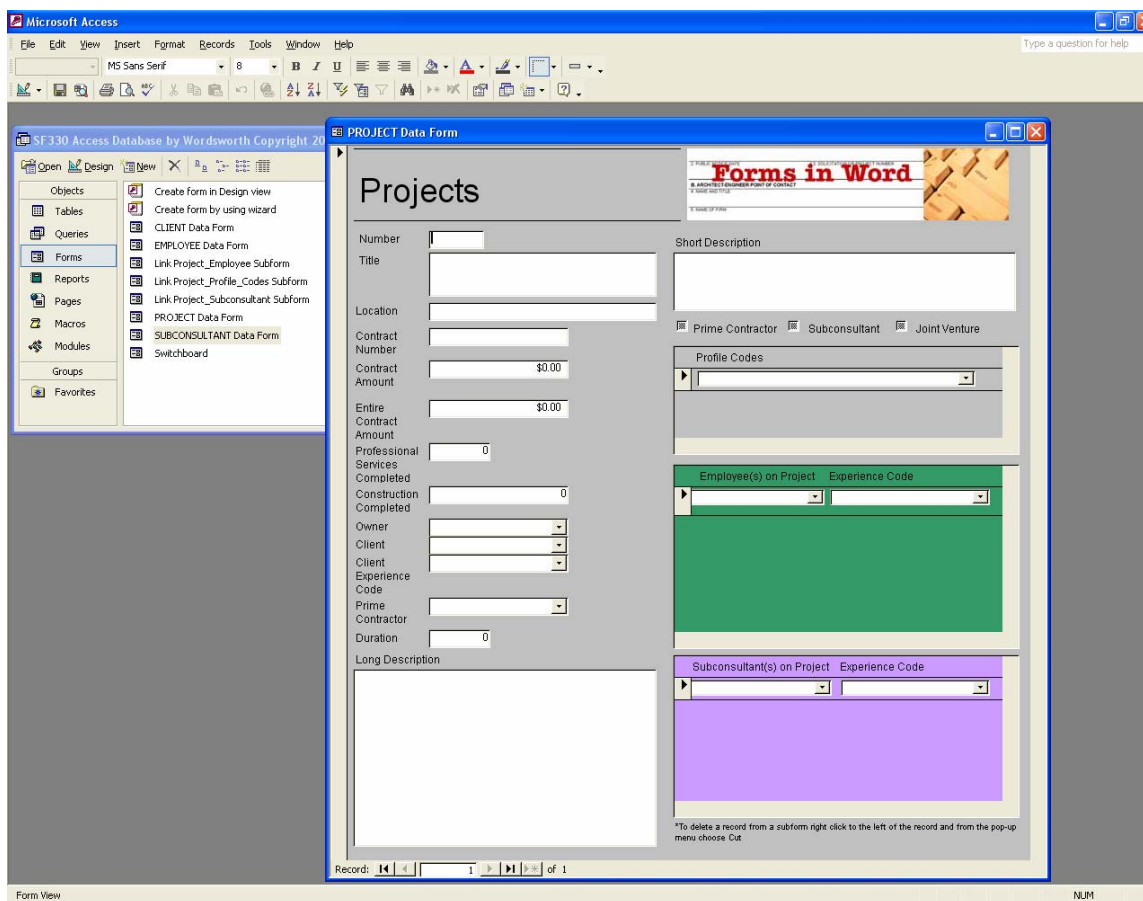Use the records, filter function to quickly locate records.

GETTING STARTED

FORMS
#1   Double click and open the database
#2   Find the objects tab and open the "Projects Form." The screen view is fully adjustable for all forms.

PROJECTS FORM

Screen view of the Projects Form

IMPORTANT: Prior to using the Projects Form you will need to enter information into the Employees, Subconsultants, and Clients Forms. You will then be able to use the drop-down lists to attach employees, subconsultants, and clients to your projects.
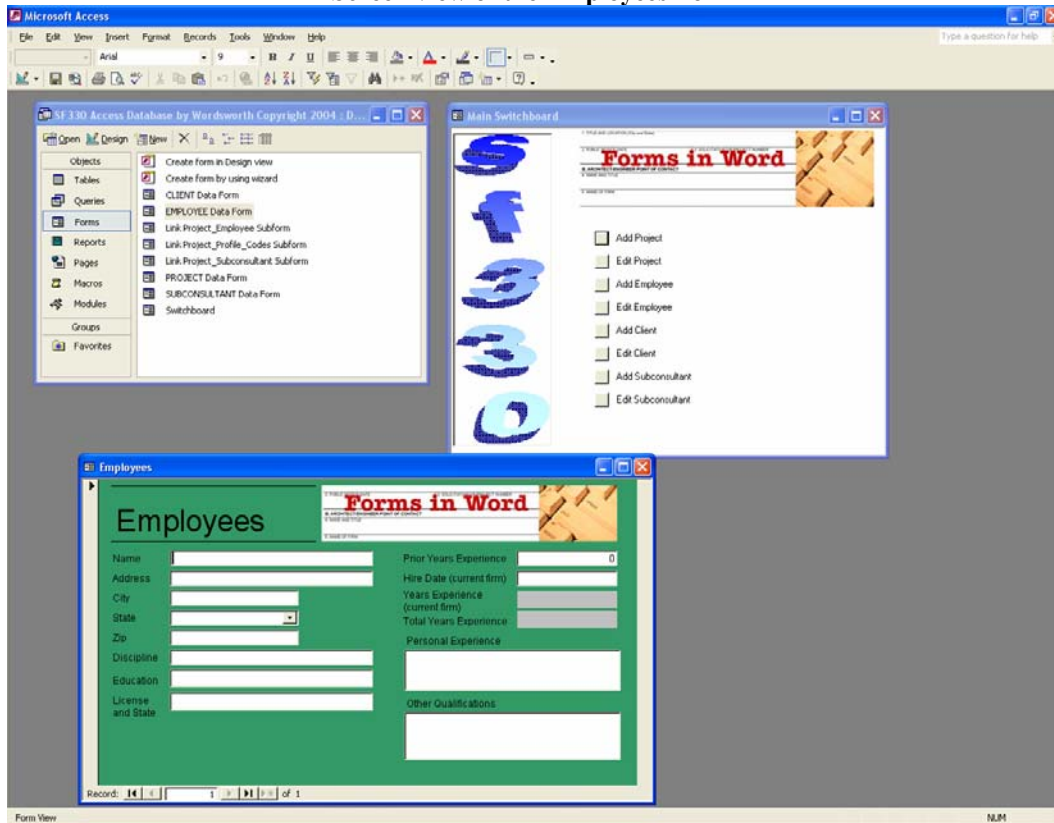
Following are instructions for entering information into the Projects Form:

- Project #: Use your company project number here. It will help you find and locate projects.
- Project Title: This is where you name the project with a title for the SF330
- Contract Number: This is not a mandatory field but it has proved helpful in the writing of proposals for identifying projects.

- Contract Amount: Your portion of the entire contract amount.
- Entire Contract Amount: Fill this in if known. (Sometimes this is an unknown quantity.)
- Professional Services Completed: Completion date of your portion of project.
- Construction Completed: Completion date of entire project
- Project Owner: You will be able to choose a project owner from the drop-down list.
- Client/Prime Contractor: Use this field to select your project client.
- Duration: This is not a mandatory field although some agencies are requesting to know the length of time your company spent on the project. (for instance: This was a 2-year contract with 3 option years or this was a six month project)
- Fill in the checkbox that indicates whether you were the prime contractor, subconsultant, or this was a joint venture project.
- Short Description: Use the short description field to assist in writing the resume portion of the SF330. Write a few short sentences only.
- Long Description: Enter the long description for your project here. There is no limit to the length.
- Profile Code: Choose a profile code for the project. Once you have chosen one a field will appear below where you can choose another. You can use multiple profile codes for each project.
- Employee: Choose an employee(s) and choose a role for that employee from the drop-down list. You can choose and add multiple employees to the project. You can come back later and choose more.
- Subconsultant: Chose a subconsultant(s) and choose a role for that subconsultant from the drop-down list. You can choose multiple subconsultants for projects.
- Client: Choose a client for the project from the drop down list. If it is a new client you will need to enter them into the Clients Form beforehand.

EMPLOYEE INFORMATION

Screen view of the Employees Form

Following are instructions for entering information into the Employees Form:
- Name
- Address
- City
- State
- Zip
- Education: This is a text field that will allow more than one degree.
- License and State: This is a text field that has room for more than one license. (For example: PLS#64567, Alaska)
- Discipline: Job title for project
- Prior Years Experience
- Hire Date: (Example formatted date 01/01/2004)
- Years Experience:
- Years Experience Current Firm:
- Total Years Experience: The ACCESS database will calculate for you.
- Personal Experience: You can be creative here and add one job description or multiple descriptions for projects. This field can be used for the employee's personal experience prior to coming to work for your company.
- Other Qualifications: Additional certifications, publications and papers, etc.

SUBCONSULTANTS FORM

Screen view of the Subconsultants Form
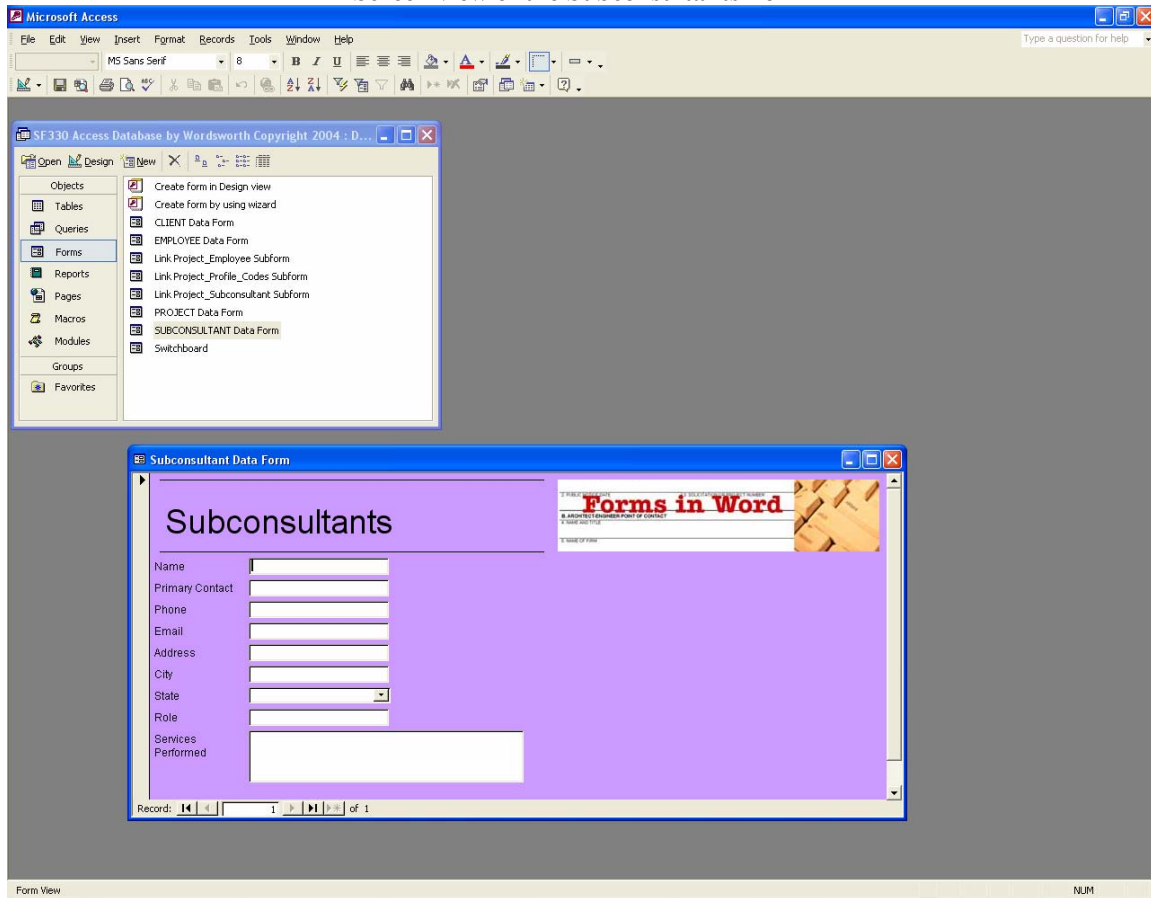
Following are instructions for entering information into the Subconsultants Form:

- Name
- Contact
- Phone
- E-mail
- Address
- City
- State
- Role: Type of Service
- Services Performed: This is a large text field where descriptions of the services that are performed by the subconsultant can be stored and their capabilities added to your proposals.

CLIENTS FORM

Screen view of the Clients Form
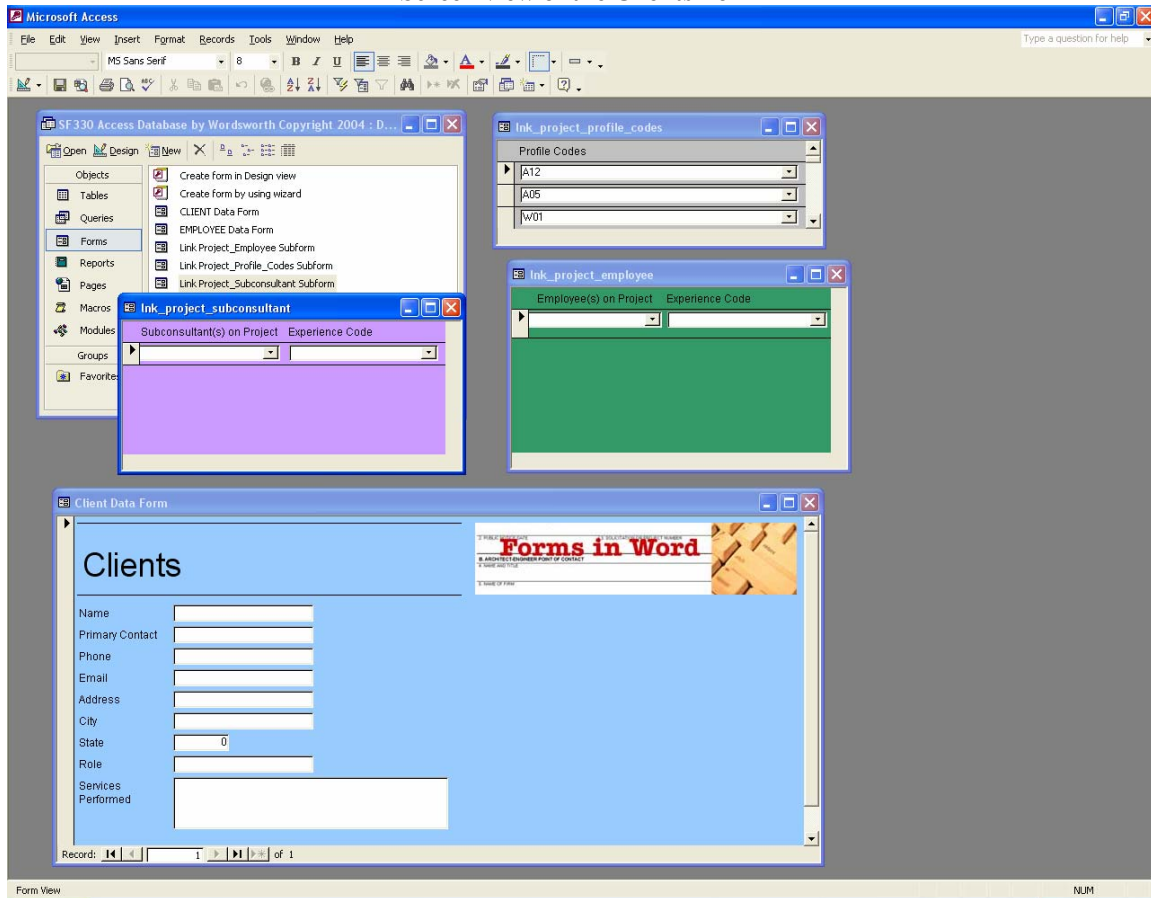
Following are instructions on entering information into the Clients Form:

Name
Primary Contact
Phone
Email
Address
City
State

REPORTS AND QUERIES

RETRIEVING INFORMATION FROM YOUR ACCESS DATABASE

Queries: On the left tab, select queries. Use the Design Wizard to choose the field(s) that you want to query. This is a helpful tool for finding projects. You can query all fields or choose one.

Reports: Use the Design Wizard to choose the fields you would like to include in your report. The report layout (or screen view) can be changed. You can change the look of your reports through Design View.

Queries and Reports can be easily deleted from the database; just recreate them each time you use the program. Or, leave them in for the next proposal.

CUT AND PASTE. Information retrieved through queries and reports can be cut and paste into your SF330 Word document!

IMPORTANT: Open your Microsoft Word document (SF330) in Rich Text Format prior to cutting and pasting information. This can be accomplished by opening your document; giving it a file name and saving as type: Rich Text Format.

The best thing about this program is that you are able to tailor it to meet your company's needs. Fields can be lengthened or shortened. You can add and delete fields. The program automatically updates. Records can be easily edited, added, and OOPS deleted. You will be surprised with the program's capabilities.

Detailed instructions, as well as helpful hints, on how to use Microsoft Access are contained at the Microsoft Access home page and can be found at
http://office.microsoft.com/en-us/FX010857911033.aspx