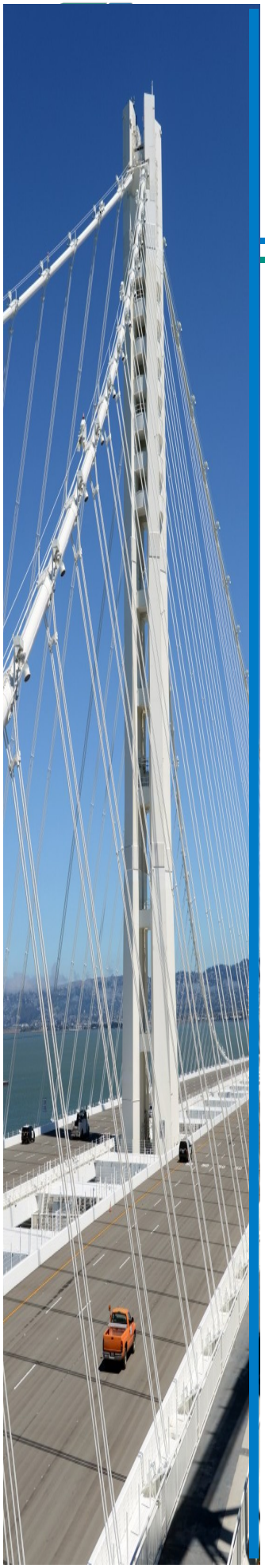

FormsPLUS

Local Assistance Electronic Forms & Database

User Manual & Tutorial

Version 1.0v5

Caltrans Division of Local Assistance

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INTRODUCTION

Welcome to FormsPLUS

FormsPLUS is a breakthrough product that meets the basic needs within local and regional agencies to generate and track project related forms. Currently, each agency must develop their own method of completing and tracking these forms. Developed by the Caltrans Division of Local Assistance (DLA), FormsPLUS was designed to streamline and standardize this process, and to provide agencies with a turnkey alternative to reinventing form management from scratch. FormsPLUS is a helpful tool to assist local and regional agencies achieve their highest priorities of project delivery and compliance with rules, regulations, and procedures.

What is FormsPLUS

FormsPLUS is a forms management application that allows the completion and the tracking of over 120 forms contained in the Local Assistance Procedures Manual (LAPM) and the Local Assistance Program Guidelines (LAPG) that are necessary to secure state funded and federal aided transportation projects.

While FormsPLUS is primarily a forms management database, it also stores project information and can be used to track the status of forms submitted to Caltrans DLA.

Why Use FormsPLUS

FormsPLUS helps perform two key activities:

(1) Complete the forms required for transportation projects and
(2) Track the status of forms during project delivery.

Designed to be user-friendly, form completion is accomplished with the utilization of convenient features such as auto-calculations and global fields, drop-down lists, and check boxes. Tracking features in FormsPLUS allow for the tracking of forms during the life cycle of the project by providing multiple reporting options, the ability to provide status updates in the approval process, and the capability to perform several search criteria to assist in locating existing project forms. FormsPLUS has an integrated help system to provide answers to form related questions essential for correct completion, as well as a FormsPLUS integrated help manual to assist in answering application related questions.

Important Information

Changes in legislation and procedures that govern the funding of transportation projects may affect the applicability of some forms used in FormsPLUS if an updated version of FormsPLUS is not available. However, please note that new changes to legislation and procedures that govern the funding of transportation projects will not affect the applicability or usefulness of all the project related forms used in FormsPLUS found in the Local Assistance Procedures Manual and Local Assistance Program Guidelines.

If there is a question regarding the applicability of a form, please use the following link http://www.dot.ca.gov/hq/LocalPrograms/FormsPLUS/ to check for updated forms (in the Local Assistance Procedures Manual and Local Assistance Program Guidelines) that may not yet be incorporated into FormsPLUS.

Technical Support

Please visit our website at http://www.dot.ca.gov/hq/LocalPrograms/FormsPLUS for information about FormsPLUS releases, a list of frequently asked questions (FAQs) and other information regarding FormsPLUS. If you are unable to find the answers to your technical questions in the FAQ section, please email us at FormsPlus@dot.ca.gov.

What FormsPLUS Is Not Designed To Do

⇒ FormsPLUS does not transmit forms to Caltrans electronically neither to other parties.

⇒ FormsPLUS does not replace the need to print and submit hard copy forms with original signatures in order to initiate the project funding process.

⇒ FormsPLUS only tracks project forms as found in the Local Assistance Procedures Manual and Local Assistance Program Guidelines.

⇒ FormsPLUS only tracks project forms using most current format. Users should also save old forms in PDF.

System Requirements

FormsPLUS is a standalone database developed in FileMaker Pro for Intel-based PC's using the Microsoft Windows operating system. It is not necessary to have FileMaker installed on your computer in order to use FormsPLUS; you must have the following minimum equipment and software to run the application:

⇒ 1 GB of RAM

⇒ Hard disk with a minimum of 4GB of free space

⇒ Microsoft Windows 7 or higher version

⇒ Internet Explorer 7.0 or higher version

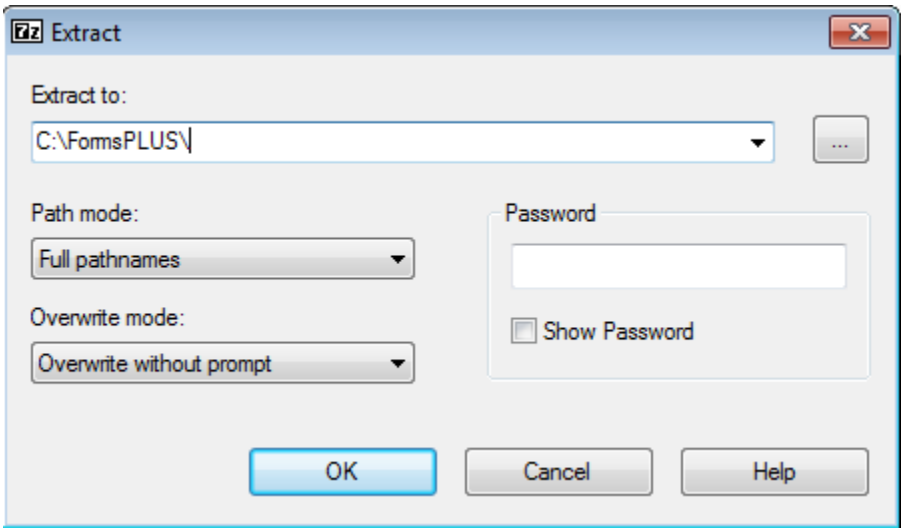
⇒ Adobe Acrobat Reader 6.0 or higher version

INSTALLATION INSTRUCTION

Installation for New User

DLA provides downloading for FormsPLUS. Zipped file FormsPLUS1.0v1.zip is posted at DLA website
www.dot.ca.gov/hq/LocalPrograms/FormsPLUS/download.htm

1. Use right mouse to click zipped file and choose "extract files". A small window will pop up (see figure below)



   a. Extract to—type driver name and folder name "C:\FormsPLUS\" or "F:\FormsPLUS" if user wants to install FormsPLUS on server "F:".
   b. Choose Path mode as "Full pathnames".
   c. Choose Overwrite mode as "Ask before overwrite" for existing users or "Overwrite without prompt" for new users. If user choose "Ask before overwrite", a question will be asked on whether to replace existing files. Choose to replace "Yes to All" to replace all files.
   d. Then, click button "OK" to start extract files to folder "FormsPLUS".

2. Build a short cut for FormsPLUS. Go to folder "C:/FormsPLUS/current". Find file "FormsPLUS.exe" and use right mouse to choose "Create shortcut". A shortcut of FormsPLUS.exe will be created. Move the shortcut to desktop.

3. Click "Register" when prompted by FormsPLUS to register the software, or go to website www.dot.ca.gov/hq/LocalPrograms/FormsPLUS/REG.htm and fill online registration form.

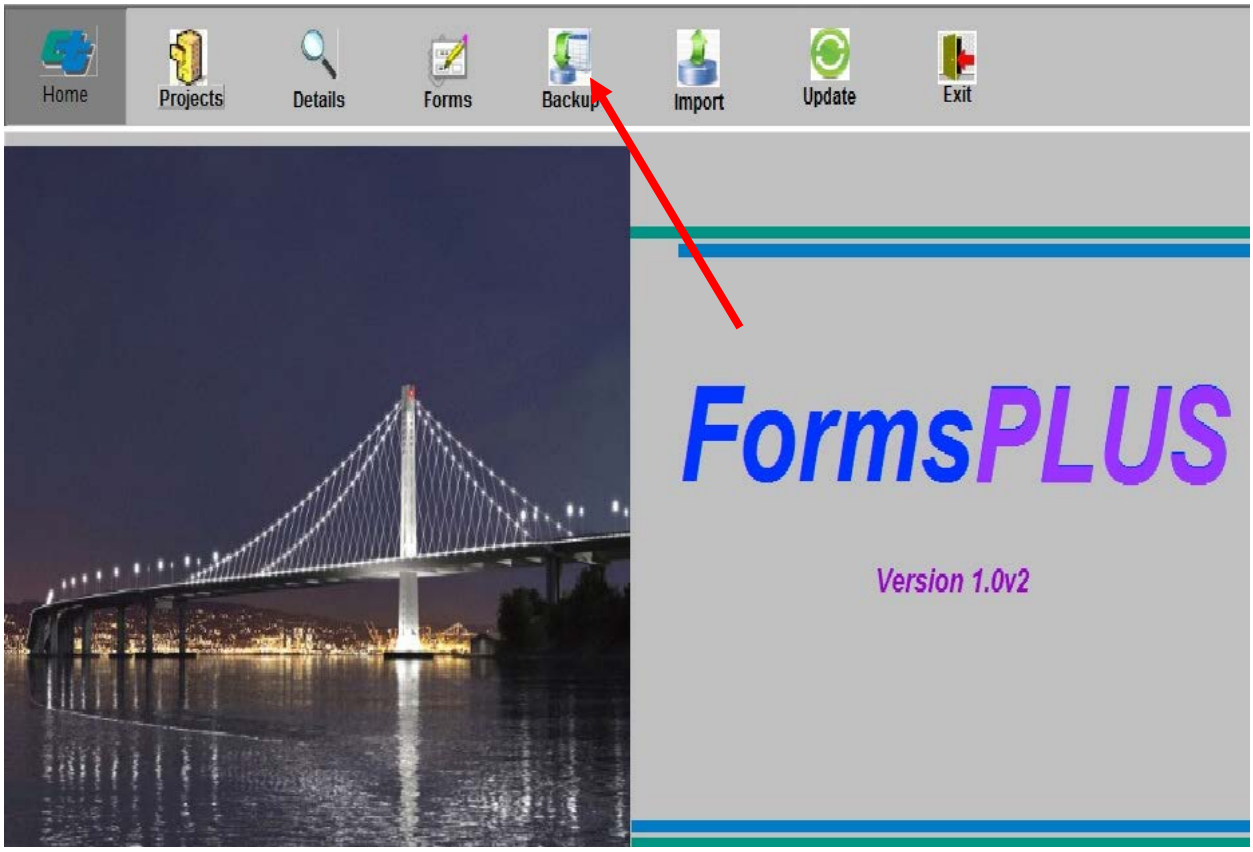
Installation for Existing User

This is the first edition of FormsPLUS. Please check the following website for new update.

http://www.dot.ca.gov/hq/LocalPrograms/FormsPLUS/download.htm

Is a user had installed a previous/current version of FormsPLUS, user have to make a backup before installation.

1. **Backup:**
   There are two options for users to backup existing forms before installing new update.
   a) User can copy all files with extension name "frm" (such as EX_m03a.frm, a form for LAPM Ex 3a) in folder "C:FormsPLUS/current" to folder "C:FormsPLUS/backup".
   b) This option is only available for FormsPLUS 1.0v2 and backup process takes long time! Click icon "Home", then "Backup" button (see screen shot below). The existing forms will be saved into folder "backup" for update. Users can double check whether the existing forms are saved by checking the files in the folder "C\FormsPLUS\backup". If there is no file in the folder, please contact FormsPLUS@dot.ca.gov.

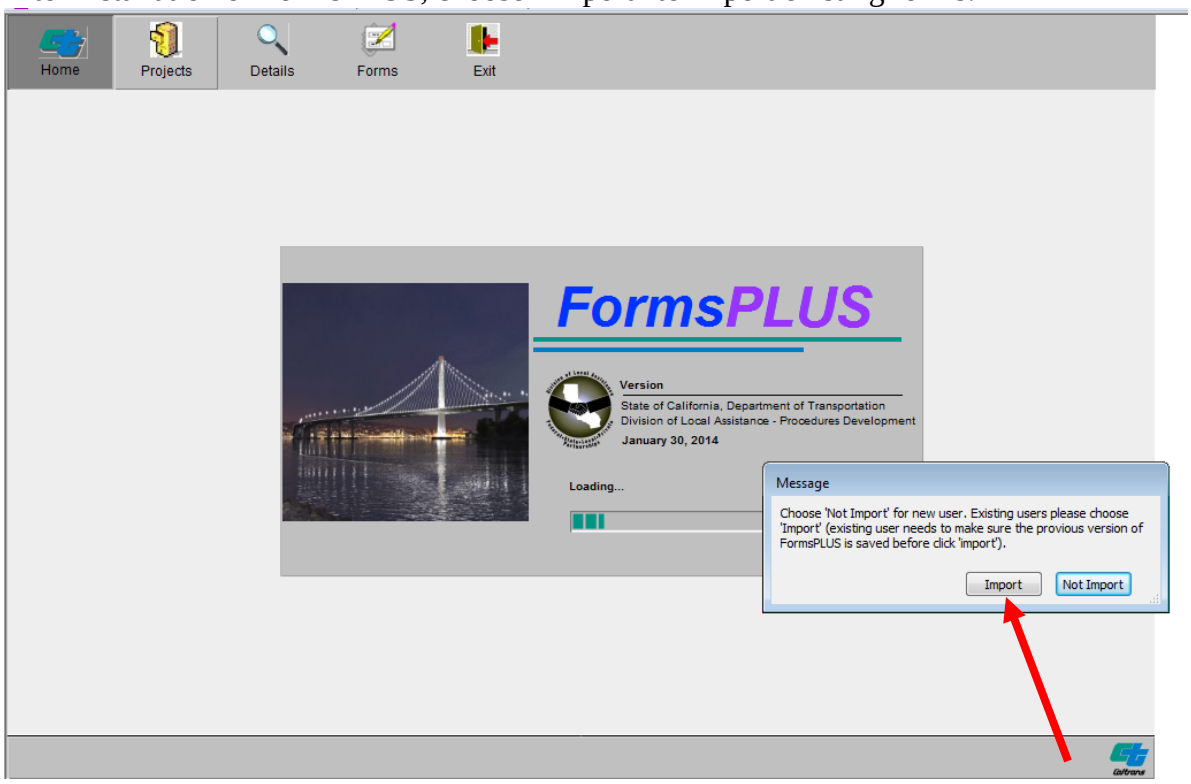


2. Installation and Import data from existing forms

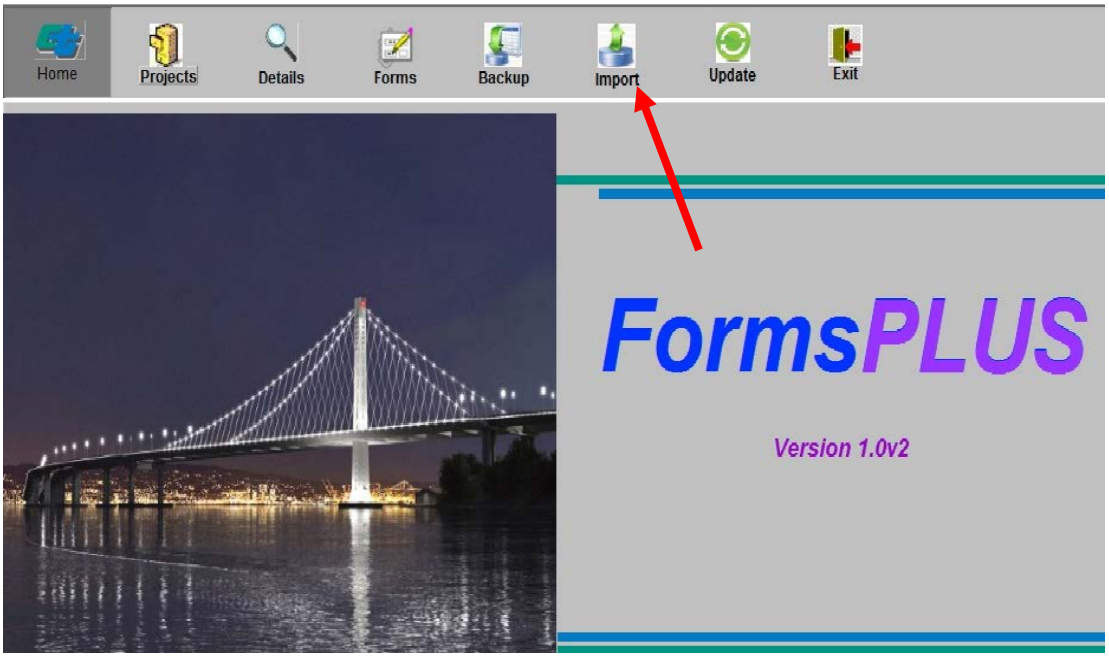
a) Follow the same instruction on page 3 for installation.

b) Import Existing forms

After installation of FormsPLUS, choose "Import" to import existing forms.



In case user choose "Not Import" when open FormsPLUS, user can still import the forms by click "Import" Icon:



In case there is any problem with importing forms, please contact FormsPLUS@dot.ca.gov.

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REGISTRATION

In order to stay informed of the latest releases of FormsPLUS, it is recommended that you register your software with Caltrans. You will be prompted the first time you start the application to register your copy of FormsPLUS. You may register by one of the following means:

a. Click "Register" when prompted by FormsPLUS to register your software or
b. Go to www.dot.ca.gov/hq/LocalPrograms/FormsPLUS/REG.htm and fill online registration form.

If you had already registered before, you do not need to register again to avoid confusion.

SCREEN SELECTIONS

1. Home Screen

The Home screen is the initial screen displayed when FormsPLUS is first launched (**see figure 1**). The Home screen contains navigation buttons that link to the *Projects*, *Details*, and *Forms* screen. You may return to the *Home* screen by clicking on the Caltrans logo located in the upper left corner of the *Projects*, *Details*, and *Forms* screen.

The *Home* screen also contains a navigation button called "*System Settings*". This button allows for the modification of Adobe Acrobat user preferences, as well as performs system backups *(refer to the "System Settings" section for more specific details).*

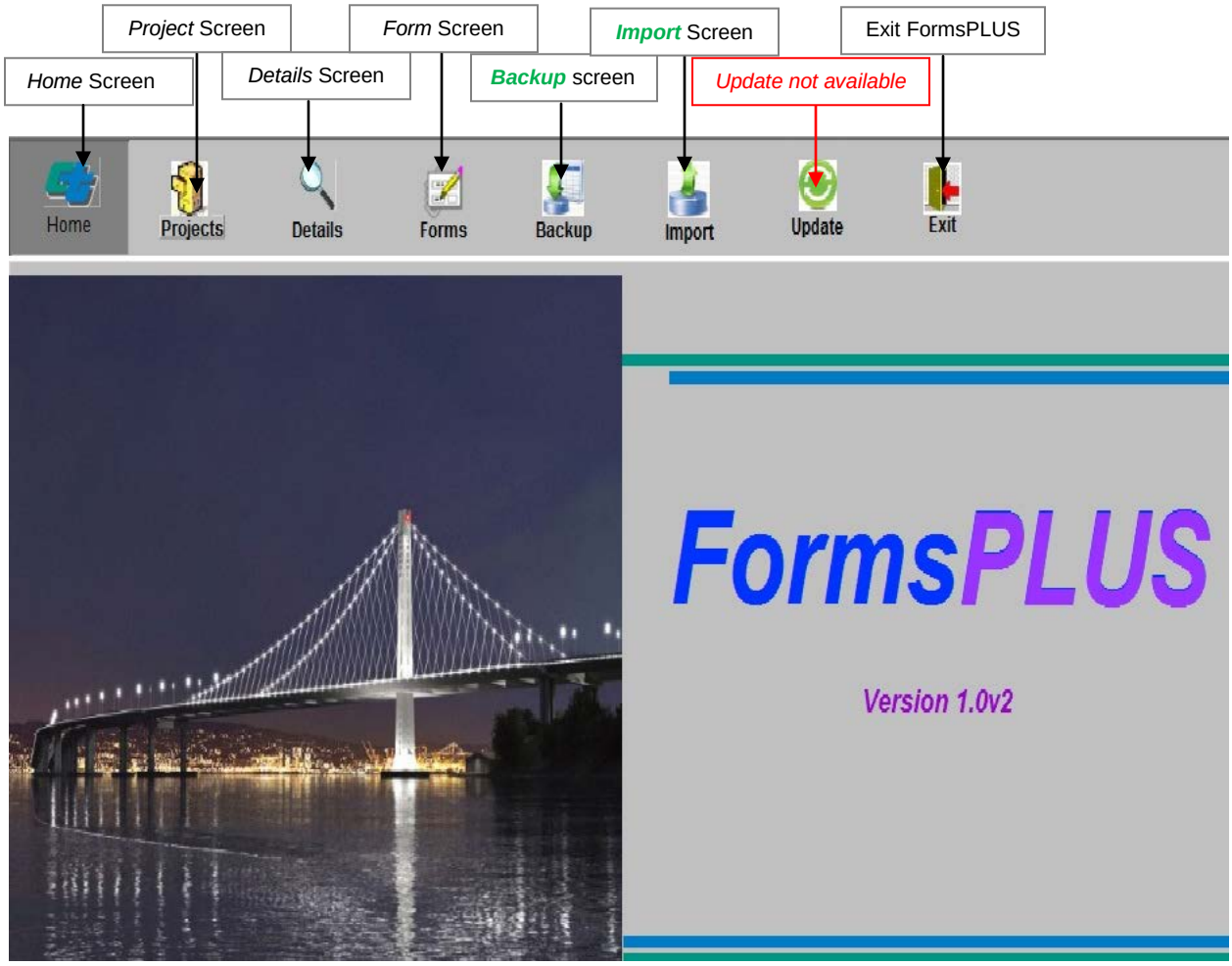


Figure 1

Command Bar

The "command bar" (**see figure 2**) at the top of the screen is shared by the *Projects*, *Details*, and *Forms* views. It contains the main controls for navigating through FormsPLUS. Note that, in the *Projects* view, the Projects button is grayed out to show that it is not available.

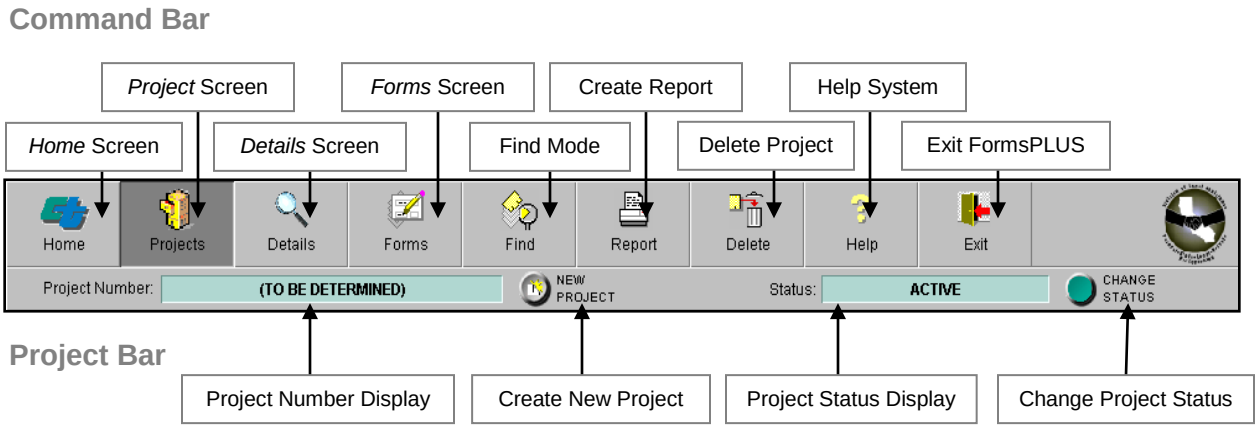


Figure 2

Project Bar

The "project bar" is located below the "command bar". The "project bar" displays the project number of the current project record selected, the "project bar" is where new projects are created, and the "project bar" displays the current status of a project as well as a "change status" option to update the project status.

2. Projects Screen

The *Projects* screen (**see figure 3**) is where new projects are created, and a listing of all projects entered into FormsPLUS is provided.

How Projects Are Listed

Projects entered are listed by project number, project location, and type of work. By default, projects are listed in the order that they were created, with the most recent project listed at the top.

Note: A project must be created before you are able to work with project related forms.

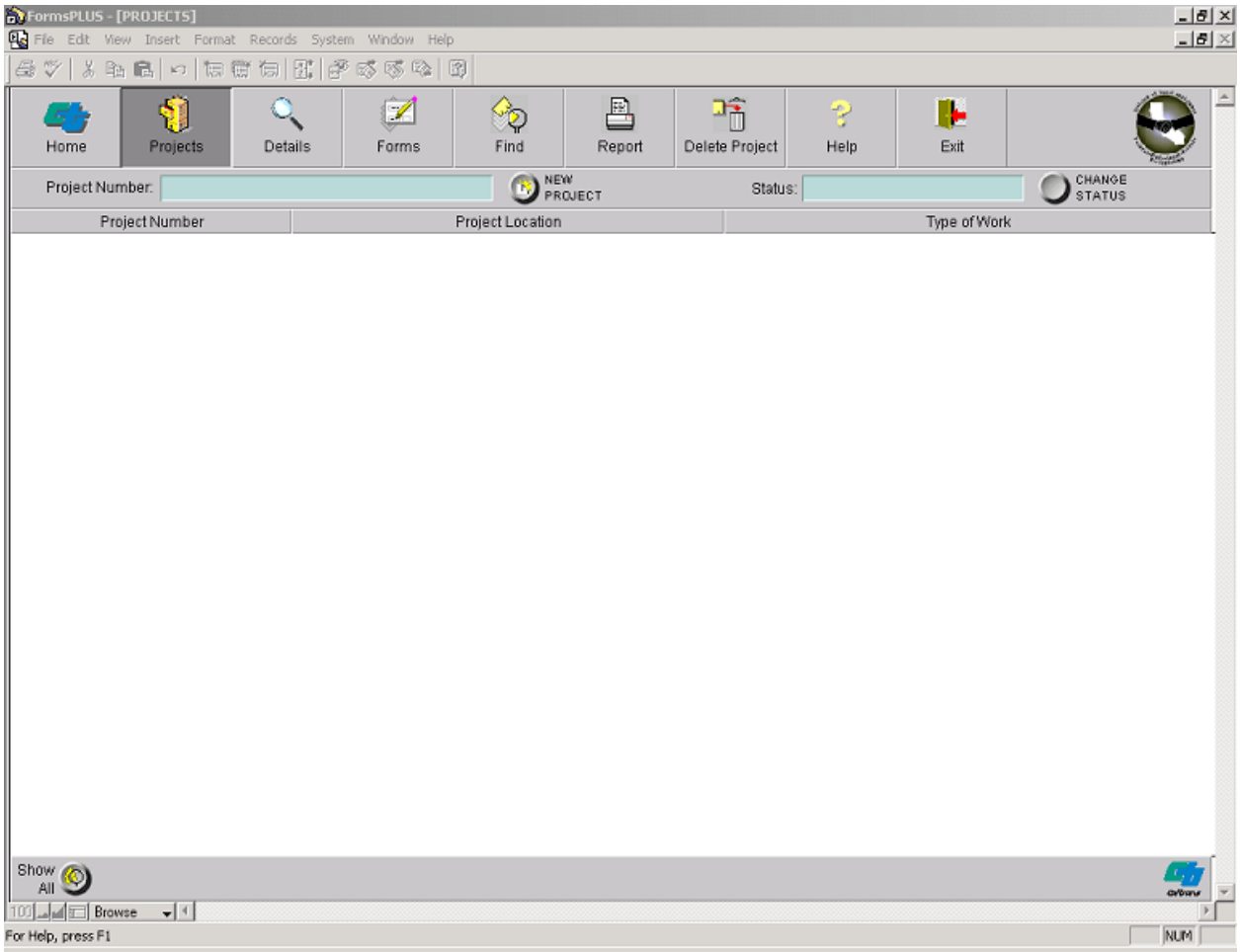


Figure 3

Projects Status Designation

Projects may be designated as "ACTIVE" or "INACTIVE" for tracking/managing forms and developing reports.

The project status is represented by an indicator on the right of the *Projects* screen. Active projects display a green indicator and inactive project display a gray indicator.

How to Search/Sort Projects

You may sort projects by project number, location, or type of work by clicking on the corresponding column heading. You can also search for a project by clicking on the "Find" button, and enter a keyword in any available field.

In addition to the standard alphanumeric characters, special characters and operators may be entered in any field to limit your search to a particular range of values. These operators include >,=,<, and …, where the comparison operators behave according to convention, and the '…'

operator indicates a range of values (e.g. 1/1/2000 … 3/15/2000). If any matching projects are found, a message will be displayed on the "record bar" at the bottom of the screen indicating the total number of project records found, and the number of project records currently entered/maintained.

3. Details Screen

The *Details* screen (**see figure 4**) is used to store your agency's information, select a Caltrans district, and to enter more detailed information for the project.

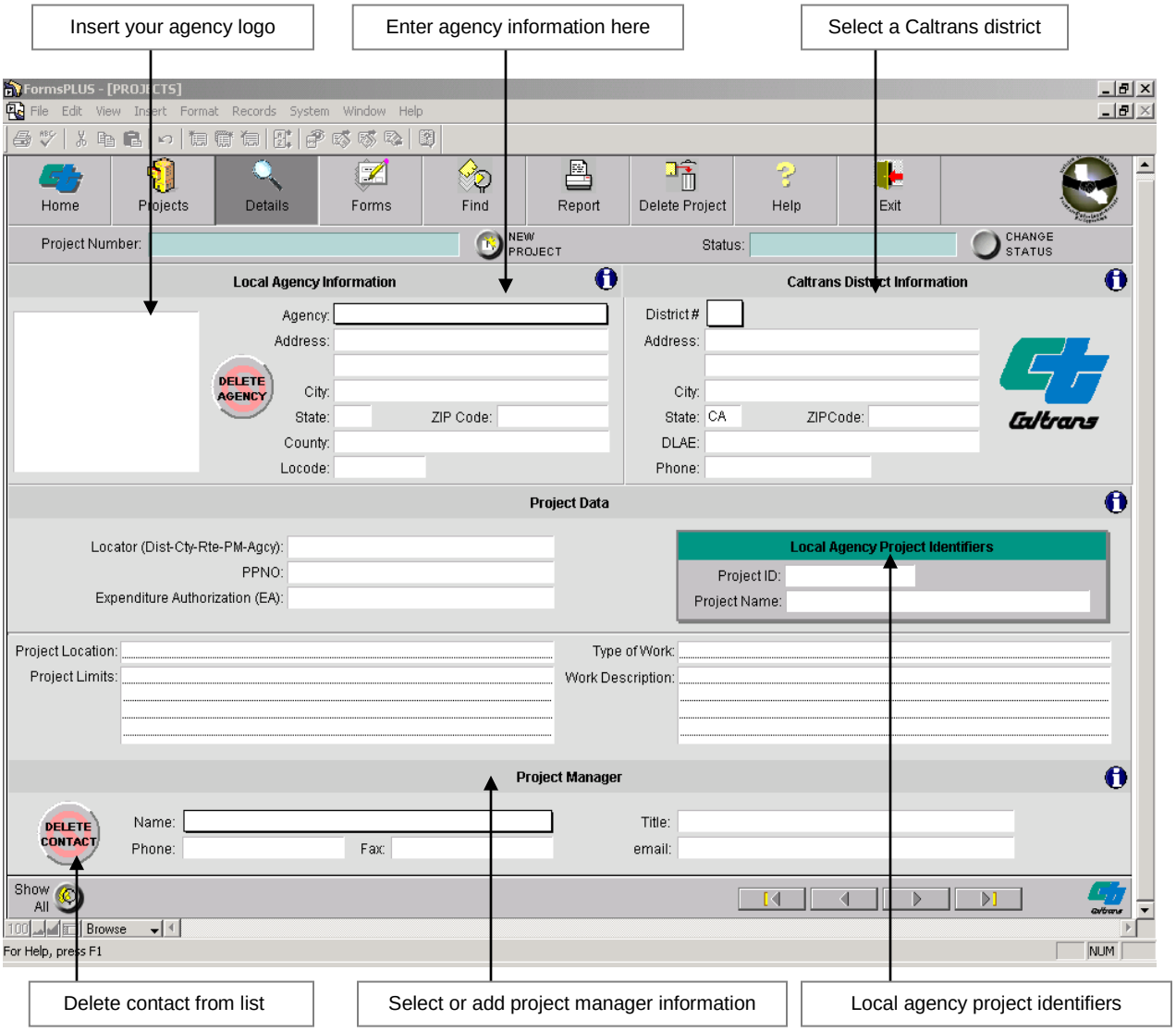


Figure 4

What the "i" Button Represents

By clicking on any of the blue "**i**" buttons, a dialog box will display with a brief description of the corresponding field(s).

Entering Agency Information

Project information can be different for each project created in FormsPLUS. You can choose an agency from the "Agency" drop-down list, or create an agency entry by choosing "Other" and entering the agency's name. You must enter one attribute for a new agency to be added and saved to the drop-down list. ***It is important to note that the information entered in the Details screen carries over into other related fields throughout the project.***

Clicking in the agency logo field will allow an image file to be selected for display along with the other agency information.

Selecting a District

Caltrans district numbers are also stored in the *Details* screen. The Caltrans district number defaults to that of the last project created. The district information is selected from a drop-down menu and is current as of the FormsPLUS release date, but this information is prone to change over time. It is the responsibility of your agency to ensure that district information is current before you submit any form to Caltrans.

Entering Project Manager Information

The Details screen is the only place in FormsPLUS where you can designate or change the project manager for a particular project. The name that you select here will appear in the signature field on all forms created for this project. Project managers are selected from an internally stored contact list. You can add a contact by selecting "Other…" from the list, which appears when you click or enter the project manager name field (**see figure 5**). Related information (i.e. title, telephone number, etc.) can be entered for a new contact and is stored in the system for later use.

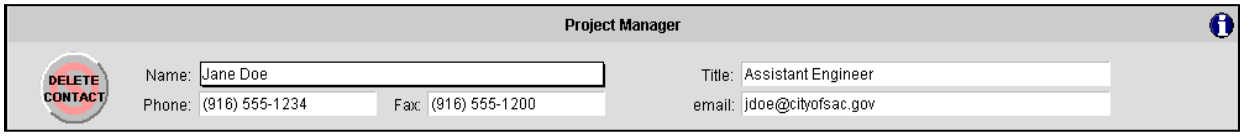


Figure 5

Deleting a Displayed Contact

To remove a displayed contact from the drop-down list, click the "Delete Contact" button to the left of the project manager fields, and click "OK" in the displayed warning dialog to confirm your intention to delete the contact.

How to Search/Sort Projects

As in the *Projects* screen, you may search for a project in the *Details* screen by clicking on the "Find" button, and entering a keyword in any available field. In addition to the standard alphanumeric characters, special characters and operators may be entered in any field to limit your search to a particular range of values. These operators include >,=,<, and …, where the comparison operators behave according to convention, and the '…' operator indicates a range of values (e.g. 1/1/2000 … 3/15/2000). If any matching projects are found, a message will be displayed on the "record bar" at the bottom of the screen indicating the total number of project records found, and the number of project records currently entered/maintained.

How Records are Displayed

Unlike the *Projects* view, in which a list of projects is displayed, the *Details* screen displays only one project record at a time. You may navigate between projects after performing a "Find" by using the arrow buttons on the record bar. This makes the record bar especially useful in the *Details* screen (**see figure 6**).

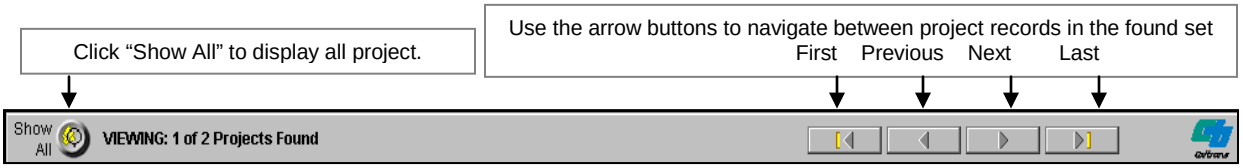


Figure 6

4. Forms Screen

The *Forms* screen (**see figure 7**) provides a menu of forms contained in the Local Assistance Procedures Manual and the Local Assistance Program Guidelines to select from when creating a new form.

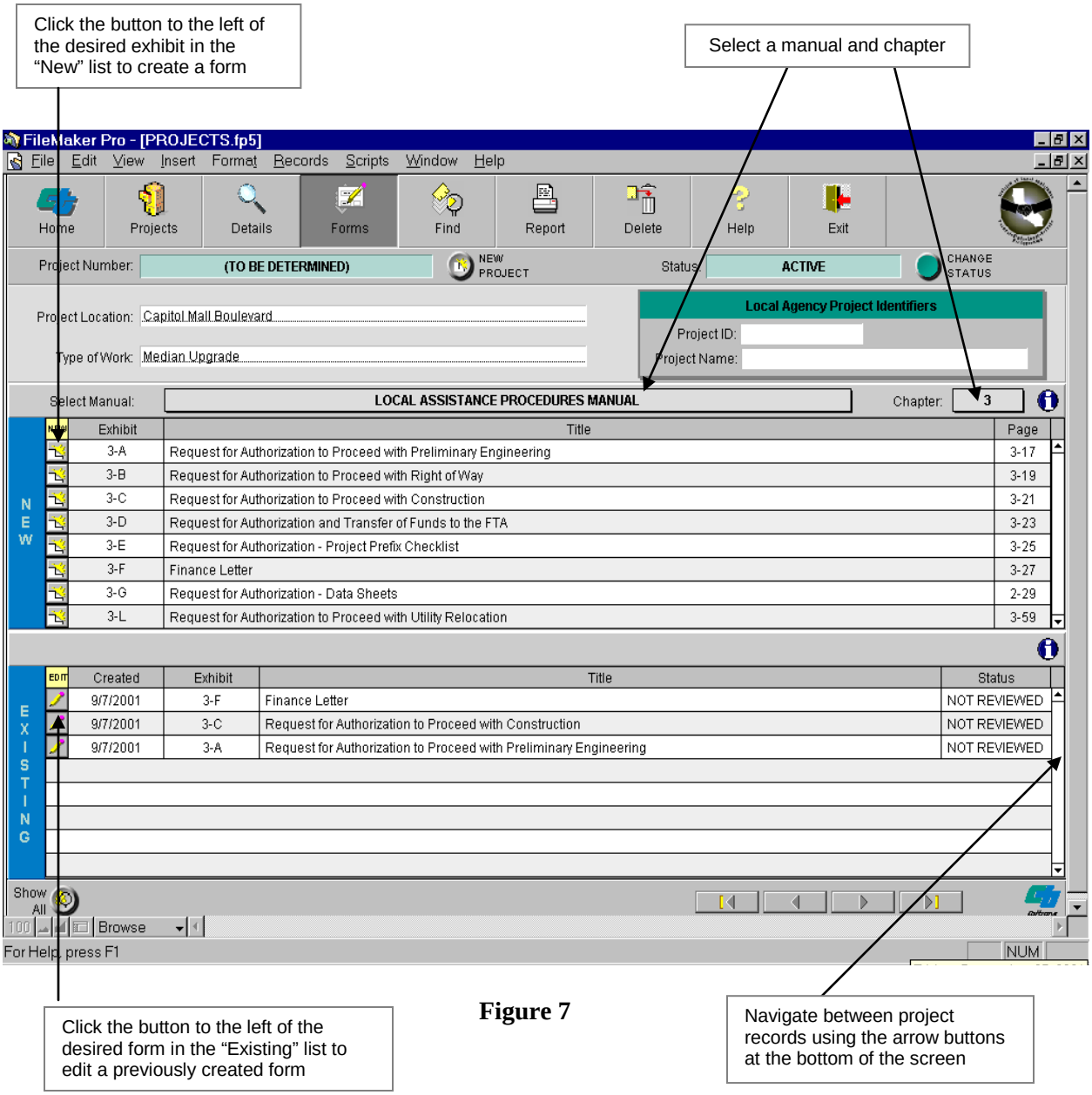


Figure 7

How to Select a Caltrans Manual

You can select/change manuals by clicking first in the "Select Manual" field and then from the drop-down menu. To select the chapter from the corresponding selected manual, click on the "Chapter" field to select the chapter from the drop-down menu. The list of displayed forms is determined by the selected manual and then by the selected chapter (**see figure 7**).

How to Create/Add a New Form

After you have selected the corresponding manual and chapter, click the button to the left of the desired form in the "New" list to create a new form for the displayed project. The selected form provides fields where you will be able to enter form specific information.

Using the Help Feature to Complete a Form

While many features have been added to facilitate form completion, it is assumed that the user has working knowledge of Caltrans procedures, and has the appropriate manual(s) available for reference. You can view the relevant manual chapter by clicking on the "**?**" (or Help) button in the command bar when viewing a form.

The Command Bar

A new form will appear on the screen for you to complete after selecting the "New" button from the list of desired forms corresponding to the selected manual and chapter. The command bar associated with creating or editing a form is slightly different from the command bar found in the *Projects*, *Forms*, or *Details* screens (**see figure 8**). This command bar contains a "Duplicate" and "Print" function that is not available in the other screens.

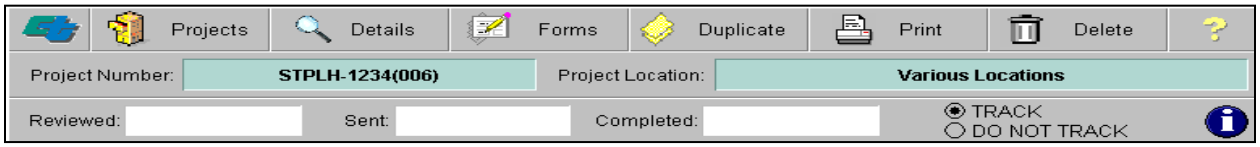


Figure 8

The "Duplicate" button takes you to the *Form Duplicator* tool, where you can make a copy of the currently viewed form within the same project. (**see *Form Duplicator* under the "FormsPLUS Tools" section**)

How to Edit a Form

The *Forms* screen contains a list of all existing forms for the selected/displayed project. To edit an existing form, click the "Edit" button to the left of the desired record in the "Existing" list. **To delete an existing form from the list, you must first select the "Edit" button to the left of the desired record in the "Existing" list, and then click the delete button.**

STOP

WARNING: Do not attempt to delete a form using the delete button in the Forms screen, doing so will delete the entire project selected/viewed!

How to Print a From

In order to print a form you must have that form open. After opening the specified form, select the "Print" button located in the command bar to print the form. When the "Print" button has been selected a preview of the current form will be displayed allowing you to preview the form before printing. By clicking on the rolodex located in the upper left side of the screen (**see figure 9**) you will be allowed to navigate between the pages of the form. After you have finished previewing the form, click on the "Continue" button located on the left side of the screen to print the form. After printing the form you may either exit the application by clinking on the "Exit" button located on the command bar, or return to the *Forms* screen by selecting the "Forms" button located on the command bar.

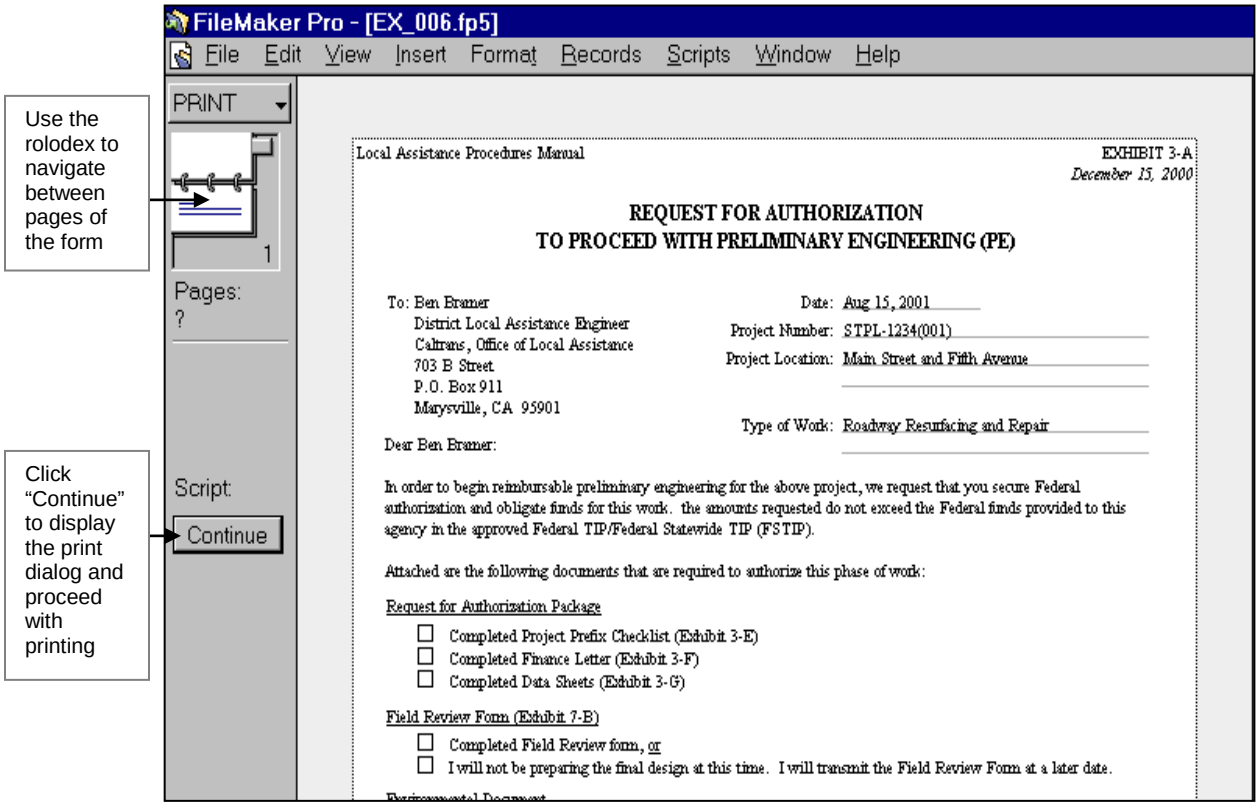


Figure 9

Note: ***If you have submitted form letters to Caltrans in the past, you will notice that FormsPLUS forms do not have instructions to print on local agency letterhead. Due to the standardized nature of electronic forms, this policy has changed. All form letters submitted to Caltrans may now be attached to a local agency transmittal letter.***

How to Delete a From

The "Delete" button associated with the selected form will delete the currently viewed form, and remove it from the displayed project's list.

Note: This is the only place in FormsPLUS where you can delete individual forms.

How to Use the Help Button

The Help button "**?**" in the selected form gives you the option to get help using FormsPLUS or you have the option to go to the specific section of the Local Assistance publication that relates to the current form you are populating. In either case, the Adobe Acrobat Reader is launched and the table of contents for the relevant Local Assistance publication manual is displayed, or the table of contents for the FormsPLUS User Manual/Tutorial is displayed.

You must have Adobe Acrobat Reader 4.0x (or later) installed to use the online help feature. The Reader can be obtained on the following Adobe website:
http://www.adobe.com/products/acrobat/readstep2.html

Form Tracking Information

"Form Tracking Information" can be entered upon the creation of a new form or changed by selecting a form previously created. By using the "Sent", "Reviewed", and "Completed" date fields, you can track individual forms as they are completed by your agency and sent to Caltrans for approval. These dates are used to update the status of forms displayed in the *Forms* screen, and are used in the FormsPLUS reporting options (***see Report Generator* under the "FormsPLUS Tools" section**).

By default, every newly created form is flagged for tracking. Once the form has been completed and has been reviewed by the project manager (or the designated authority within your agency) a date should be entered in the "Reviewed" field. When the form is sent to Caltrans, the form should have a date entered in the "Sent" field. Finally, after receiving confirmation that Caltrans has approved the form (or approved the corresponding project phase) the form should have a date entered in the "Completed" field.

Tracking dates must be entered in chronological order. If the dates have not been entered in chronological order, FormsPLUS will display a warning message and will not allow you to continue until you have entered the dates in chronological order.

If a form is designated as "Do Not Track", it will NOT appear on any reports created with the Report Generator and the words "NOT TRACKED" will appear behind the form status. For example, you may want to use this feature of FormsPLUS to retain a historical record of submitted forms.

How to Return to the Form Screen

You can return to the *Forms* screen by clicking the *Forms* button from all other screens. When the *Forms* button is clicked from another screen, you are taken to the current project viewed/selected, as indicated in the project number display. Once in the *Forms* screen, you may navigate between projects by using the arrow buttons on the record bar at the bottom of the screen (**see figure 6**).

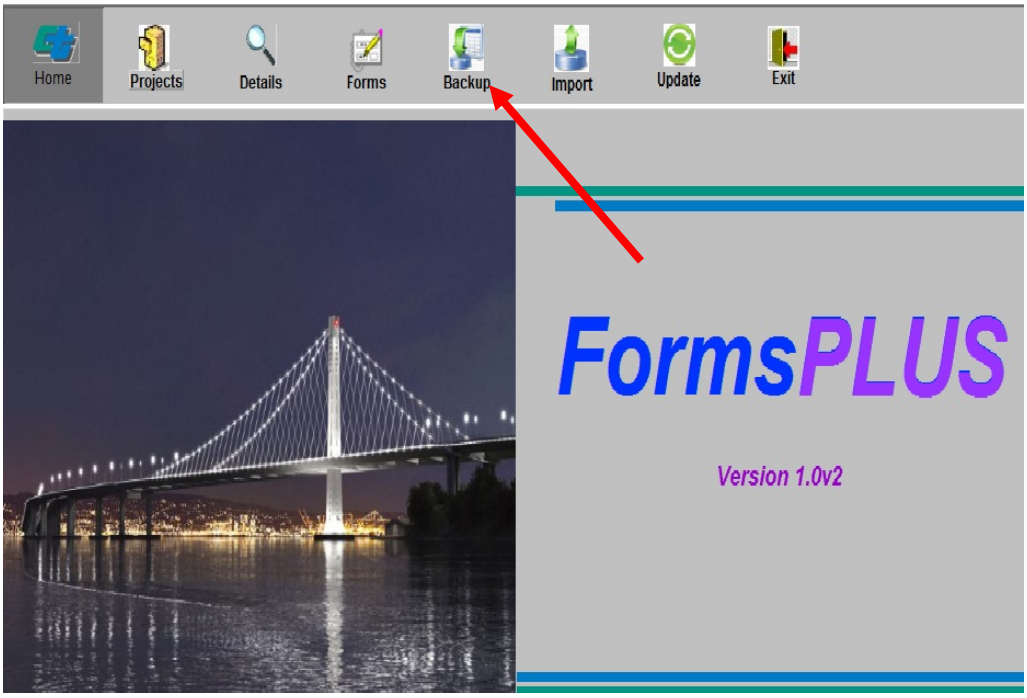
5. Backup

Click the "Backup" button to make a copy of all FormsPLUS files in the directory (default: C:\FormsPLUS\backup).

In the event that FormsPLUS data is corrupted due to hardware, operating system, or other unforeseen errors, these files will provide a complete backup.

Users are required to back up all forms before updating to new version. There are two ways backup.

a) Click the button "Backup" to back up all existing forms (see .
b) Users can also back up all forms by copy all FRM files from folder "C:\FormsPLUS\current" to folder "C:\FormsPLUS\backup". Because some of these forms are not used by users, it may cause the problem if user use "Import" function.

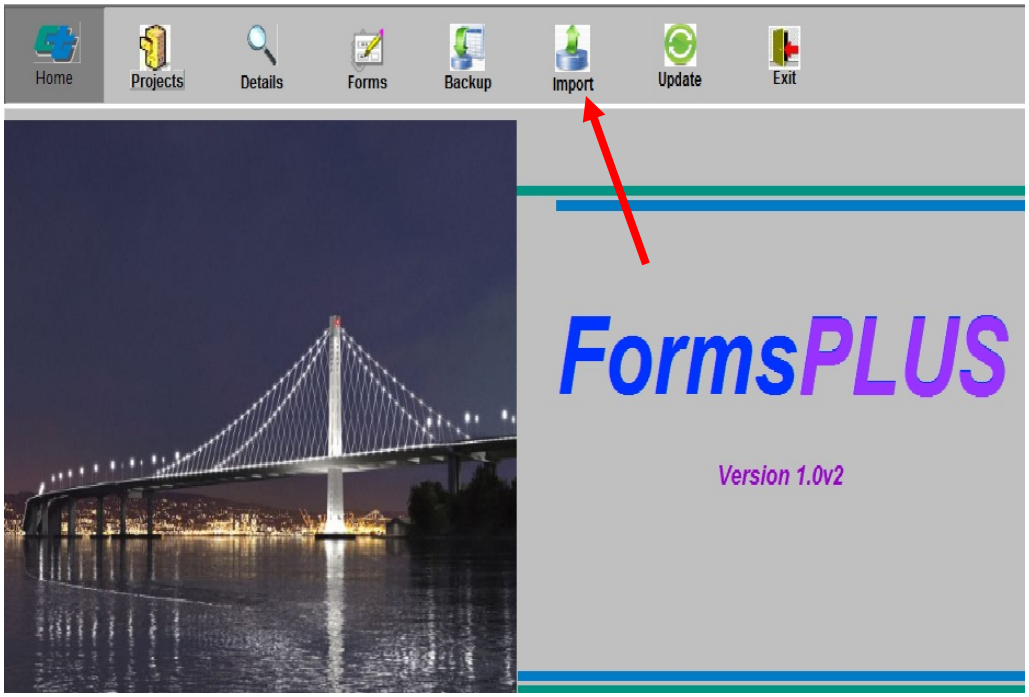


6. Import

User can click the "Import" button to import existing forms from the folder "C:\FormsPLUS\backup".

In the event that FormsPLUS data is corrupted due to hardware, operating system, or other unforeseen errors, this function will allow users to import lost forms.

Users can also use this function to import forms if users did not choose importing forms when first open FormsPLUS after installation.



7. Update

This function is not available now. We intend to simplify the update process for users through this function.

FORMSPLUS TOOLS

FormsPLUS contains tools that can be used to manage forms created. These tools include the Report Generator and the Form Duplicator.

1. Report Generator

The *Report Generator* is used to view or print a listing of forms according to a provided selection criteria. Forms are grouped on the report by project number and tracking status ("All Status", "Not Reviewed", "Reviewed", "Sent" or "Completed").

Create a Report

To create a report in the *Report Generator* select the "Report" button located on the *Projects*, *Details*, or *Forms* screen on the command bar.

Select the "Preview Only" option or the "Print" option located on the *Report Generator* before creating the report. If the "Preview Only" option is selected when creating the report you will not be able to print. The "Preview Only" option only enables you to view the report on your screen after you have created it.

After selecting the "Preview Only" option or the "Print" option, create the report in the *Report Generator* by answering the displayed questions (**see figure 10**).

Printing a Report

To print a report you have created or about to create, select the "Print" option located on the *Report Generator*, and then select the "Continue" button on the left side of the screen that appears after you create the report.

WARNING: If you do not select the "Continue" button located on the left side of the screen after you create the report, you will not be able to return to the Report Generator screen or access the command bar. If the "Continue" button is not selected and you choose to close the application window, you will be kicked out of FormsPLUS. You must select "Continue" and let FormsPLUS print your report before you are allowed to return to the Report Generator screen or access the command bar.

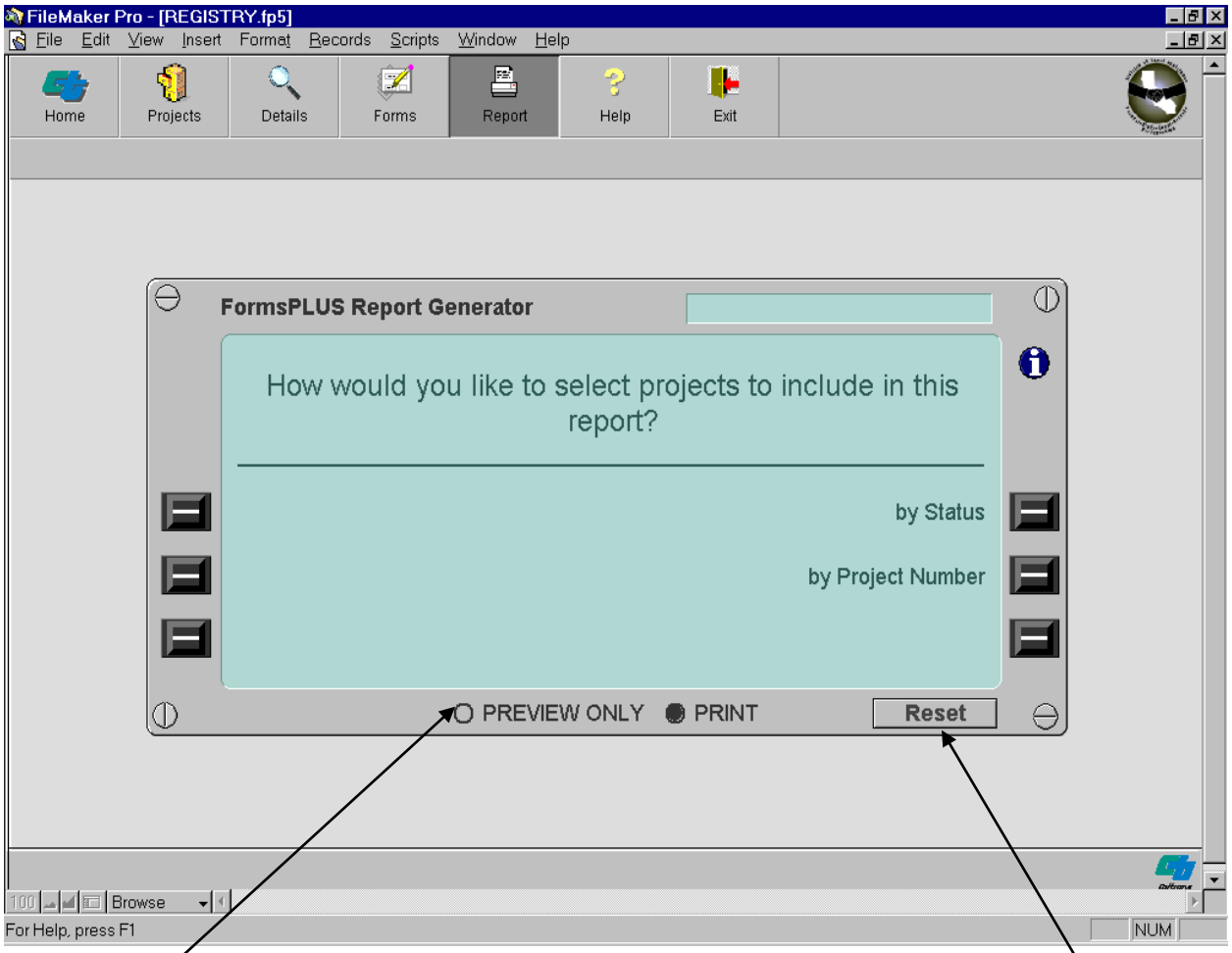


Figure 10

Select "Preview Only" if you would like to view the report on screen, or "Print" to generate a hard copy

Click the "Reset" button to create a report based on a new set of criteria

2. Form Duplicator

The *Form Duplicator* is used to make a copy of any previously completed project form within FormsPLUS. When duplicating a form the following information will appear on the duplicated form: agency information, district information, project number, project data, type of work, project location, project limits, project manager information. This information is transferred from the *"Details"* screen and pertains to the project form you select.

Duplicate a Form

To duplicate a form you must select one that has been previously populated. After the desired form displays on your screen, select "Duplicate" located in the command bar, and then click on the "Duplicate" button to the right of the project form you wish to duplicate (**see figure 11**).

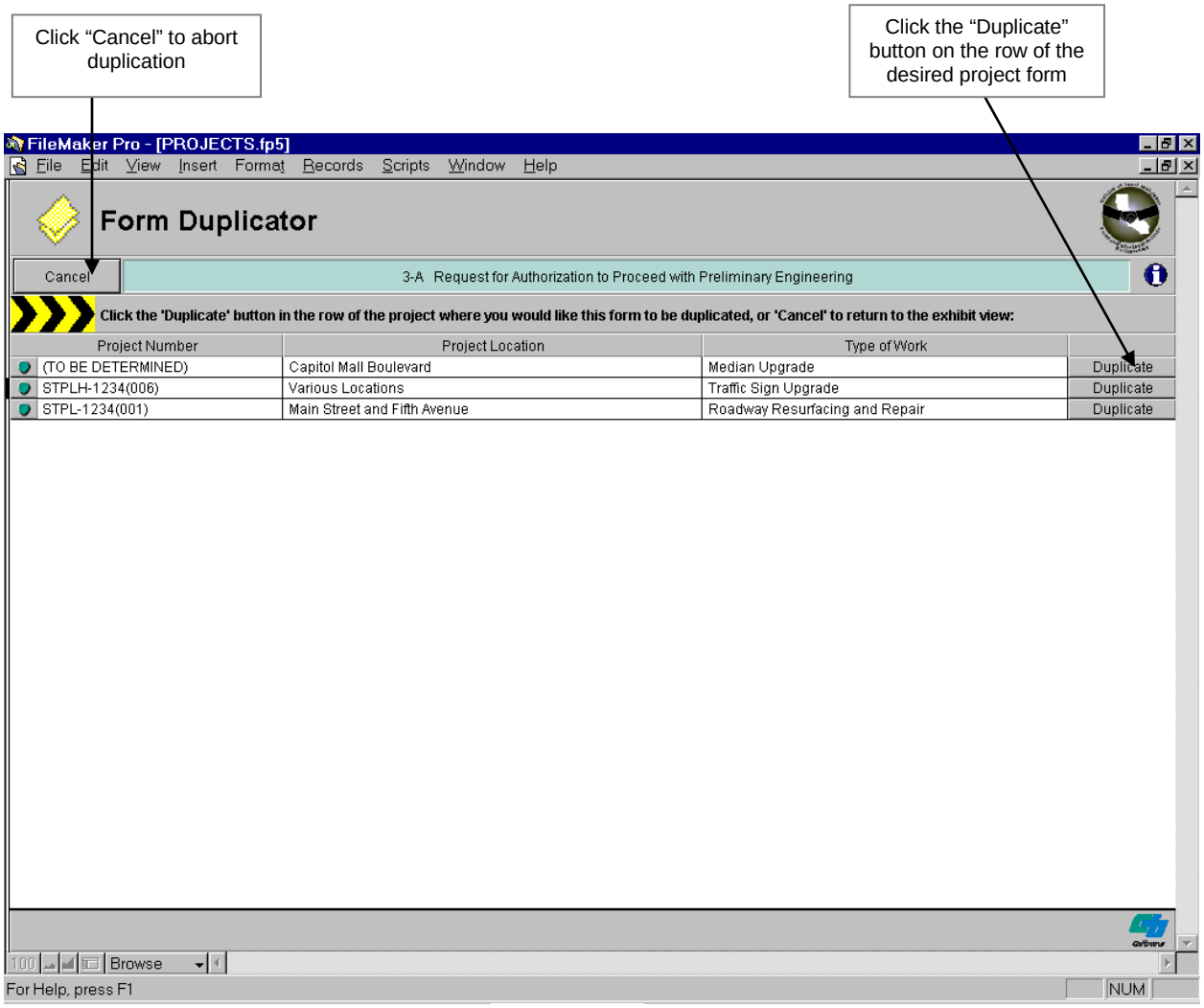


Figure 11

TUTORIAL1: CREATING A NEW PROJECT

How to Create a New Project

1. Before you can work with any forms, you must create a project to contain them. To do this, go to the *Projects* screen by clicking on "Projects" in the command bar (**see figure 13**).
   a. After clicking on "Projects" in the command bar the *Projects* screen is displayed (**see figure 14**).

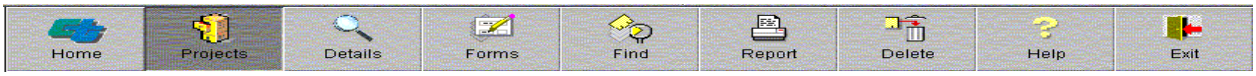


Figure 13

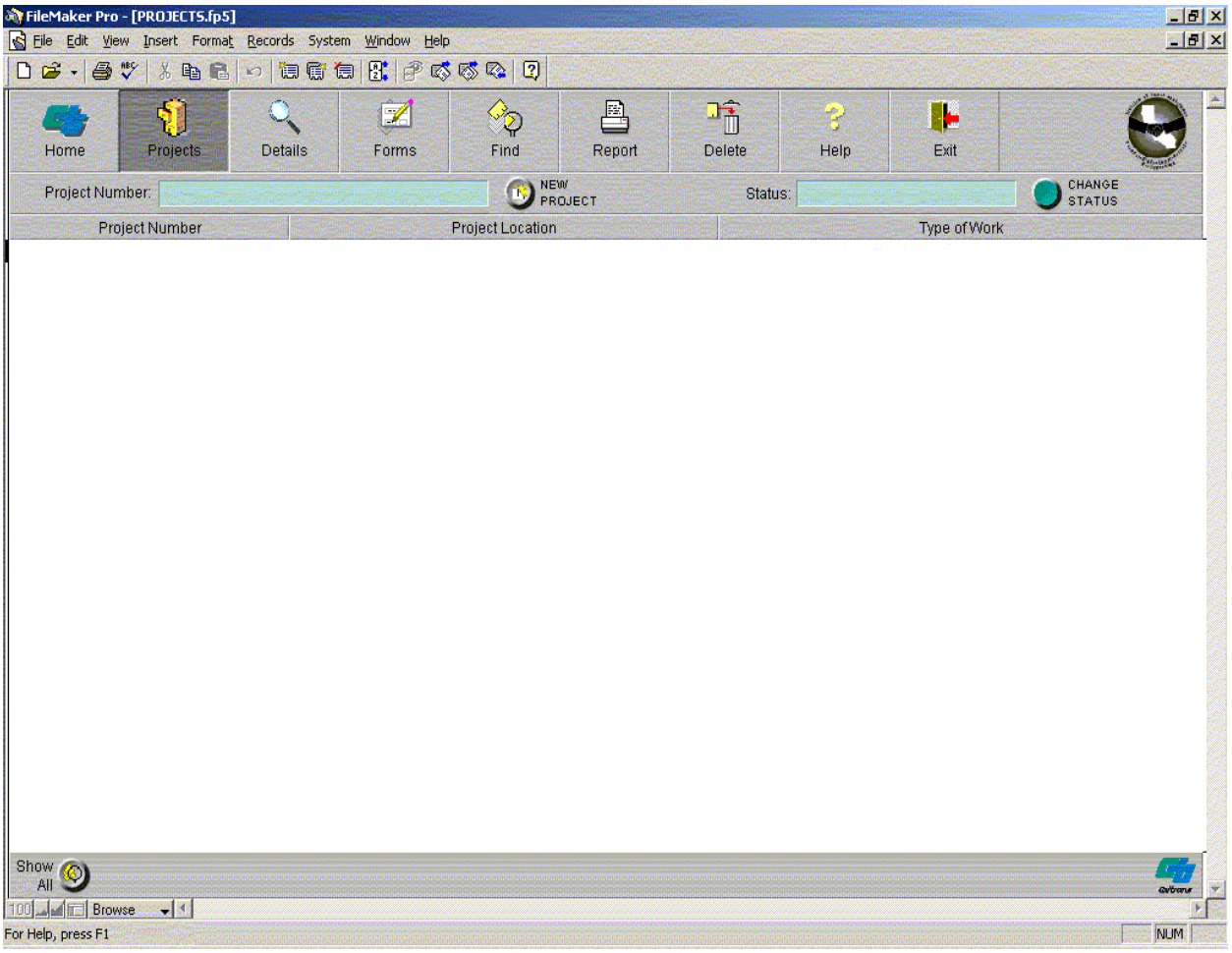


Figure 14

2. To create a new project, click "New Project" in the project bar. A new record will appear for you to enter the project number, location, and type of work (**see figure 15**).

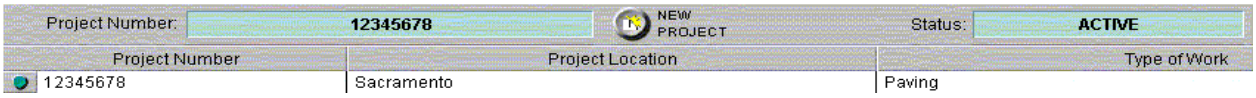


Figure 15

Enter Project Specific Information

1. To enter more detailed project information, go to the *Details* screen as shown in (**see figure 16**).

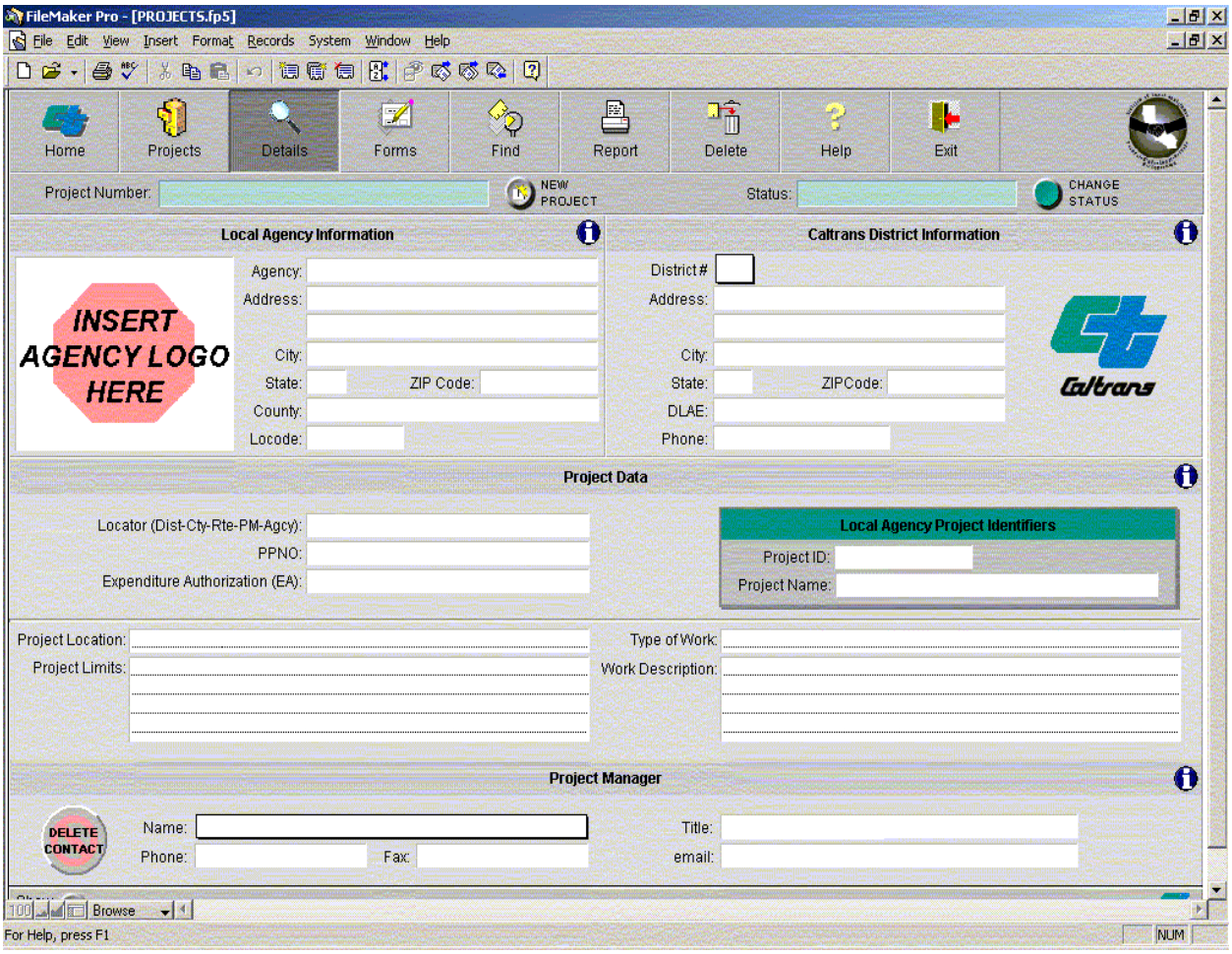


Figure 16

2. Enter your agency's information and logo in the "Local Agency Information" area located in the upper left-hand side of the *Details* screen (**see figure 17**).
   a. You must enter at least the agency's name for the agency to be saved to the database for future use.
   b. You can create/store multiple agencies by clicking on the "Agency field" and selecting "Other".
   c. The next time you create a project, FormsPLUS will choose the agency entered as the default.

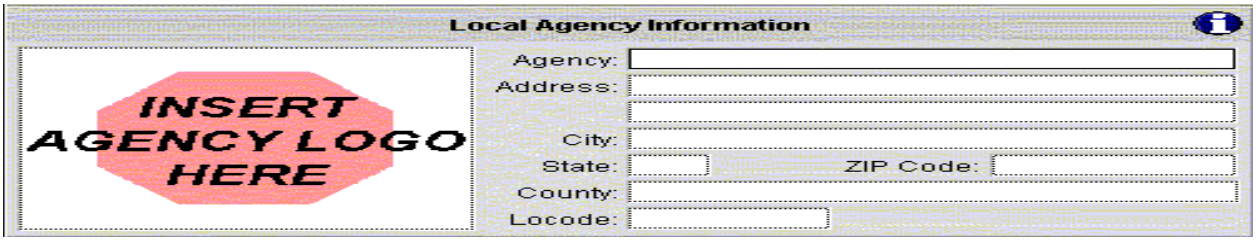


Figure 17

3. Specify the district in which the project is located in the "Caltrans District Information" area from the drop-down menu (**see figure 18**).
   a. The rest of the information about the district will automatically appear once you have selected the district number.

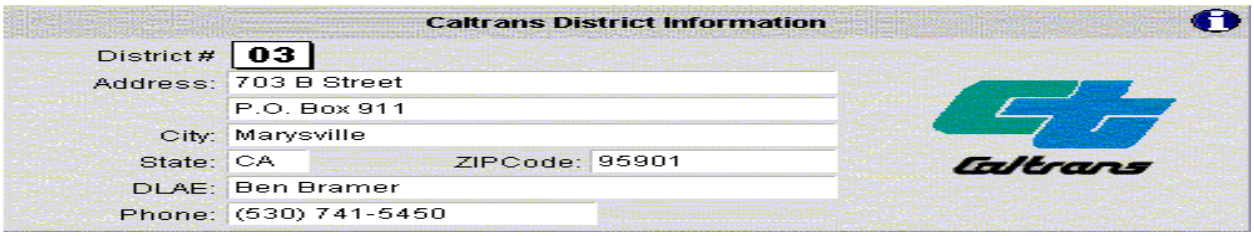


Figure 18

4. Enter information into the "Project Data" area. Project data includes identifiers and descriptive information pertaining to your project (**see figure 19**).

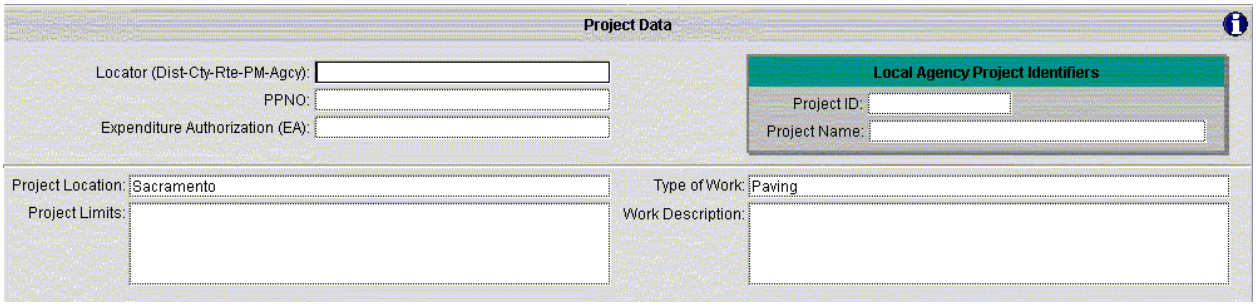


Figure 19

5. Specify a project manager for this project in the "Project Manager" area (**see figure 20**).

a. For future reference, if you entered a project manager for another project in FormsPLUS, you could simply choose their name from the name drop-down list and select “Other”.

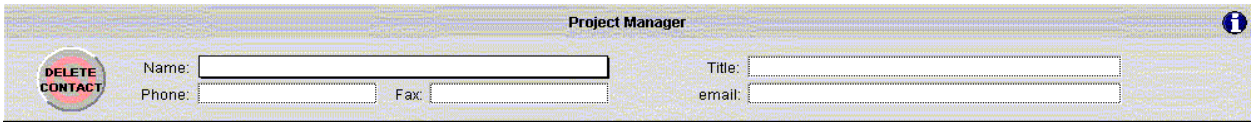


Figure 20

TUTORIAL 2: ADDING/COMPLETING A FORM

How to Add and Print a New Form

1. After creating a new project you may now create and complete forms associated with that project.

2. Select the desired project in the "Projects" screen and then go to the "Forms" screen (**see figure 21**).

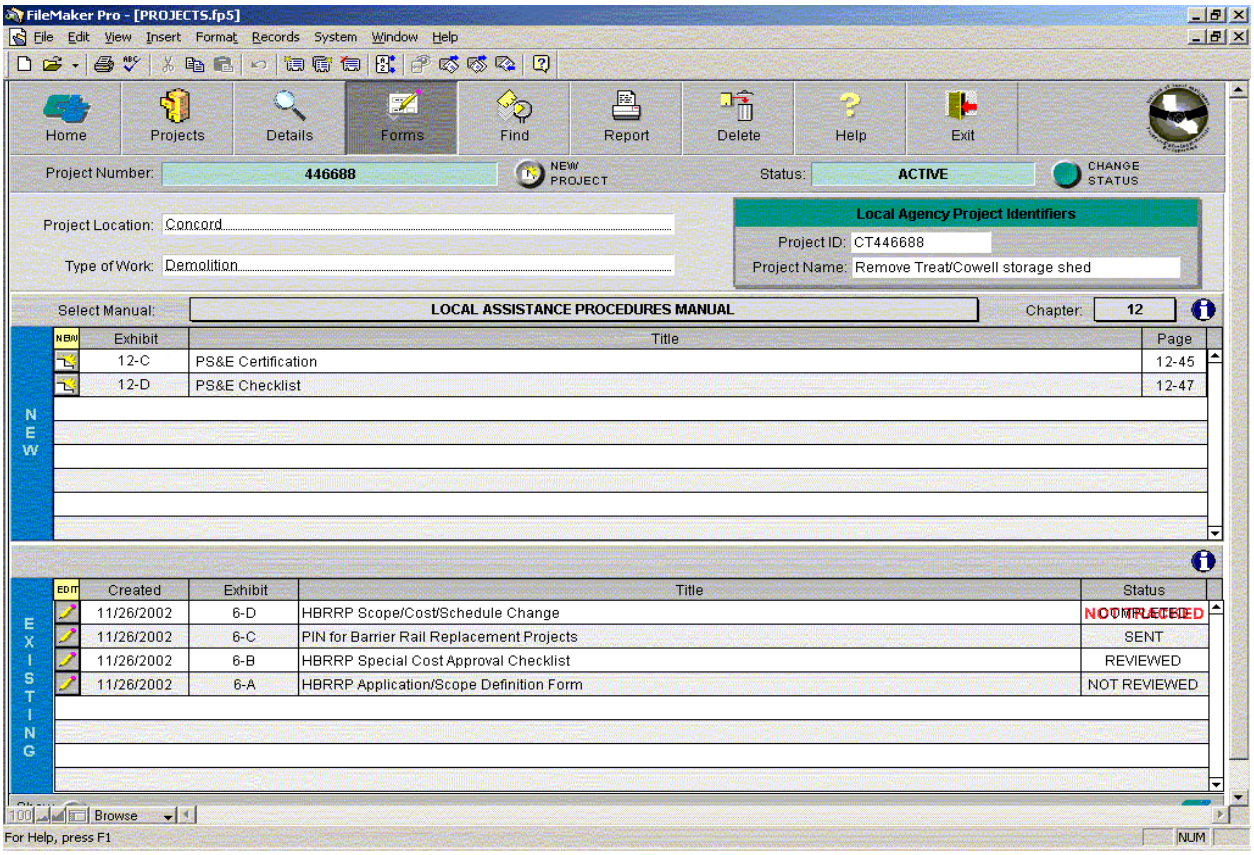


Figure 21

3. From the "Select Manual" drop-down menu, select the Local Assistance Program Guidelines or the Caltrans Local Assistance Procedure Manual.

4. From the "Chapter" drop-down menu, select the chapter corresponding to the Caltrans manual selected.
   a. The "New" section of the "Forms" screen lists all the forms available in the selected Caltrans manual chapter above.
   b. The "Existing" section of the "Forms" screen lists all the forms you have added to the current project.
5. Select a form displayed in the "New" section to add to your project.

a. After selecting a form, the form will open allowing you to populate it (**see figure 22**).

b. Most of the fields have already been populated with local agency or project information you previously entered in the "Details" screen.

WARNING: Changing information in the *"Details"* screen will also alter the information previously entered on forms within that project.

c. Once the form has been completed it is ready to print.

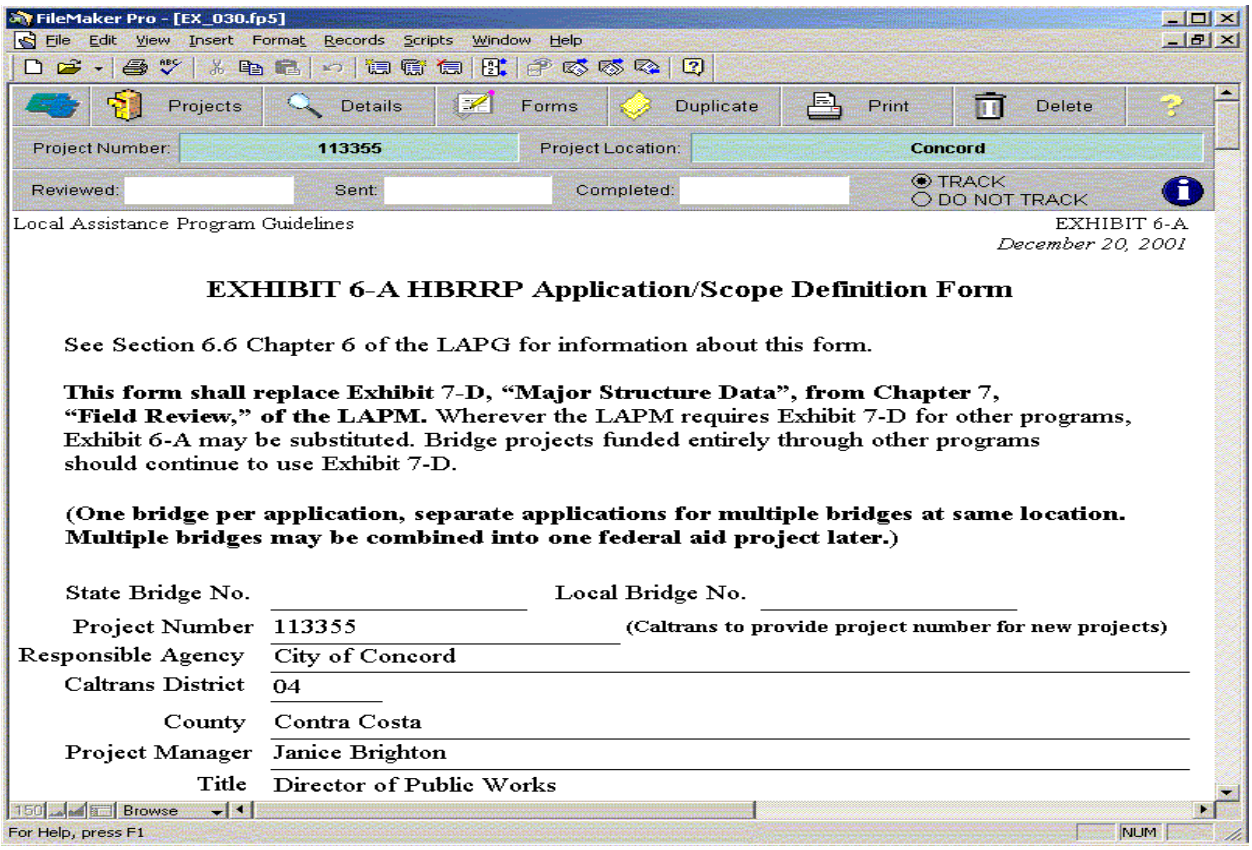


Figure 22

6. Click "Print" located in the command bar.

a. A print preview appears.

b. After verifying the information is correct in the print preview, click "Continue" to print the form.

WARNING: If you do not select the "Continue" button located on the left side of the screen after you create the report, you will not be able to return to the Report Generator screen or access the command bar. If the "Continue" button is not selected and you choose to close the application window, you will be kicked out of FormsPLUS. You must select "Continue" and let FormsPLUS print your report before you are allowed to return to the Report Generator screen or access the command bar.