

## Annual Job Order Contracting Report Instructions

- **Please completely review these instructions prior to beginning data entry.** It will help to have the Excel spreadsheet open at the same time that you are reviewing these instructions.
- **Only report for the period of July 1, 2014- June 30, 2015.** The following year(s) will be collected at a later date.
- **Do not add or remove rows or columns.**
- **Fill out all required cells completely. Do not abbreviate or omit information.**
- **You may find it easier to switch between the “WO List” and “WO Details” tabs for each work order. Every work order will have information recorded in both tabs. Both tabs need to be filled out for the entirety of your data (do not leave blanks).**
- **Fill out information in the yellow tabs: “Agency Info & Questions”, “WO List”, and “WO Details”.**
  - The “Summary” tab is a roll up of information that calculates automatically, and the “Drop Downs” tab helps with formatting. You will not be able to alter anything on these tabs.
- **On the “WO List” and the “WO Details” tabs, start entering data on Row 2, right under the header information (Row - 1).**
- **Cells that are light purple (or have a light purple header) require selection from drop down options. The arrows to activate the drop down menu are on the right-hand side of the cell.**

Open the Excel spreadsheet “CPARB JOC Data Collection”

“Agency Info & Questions” tab:

- Fill out all data fields in Column B, under “Answers”
- For the light purple cells, select the *best* answer.

“WO List” tab:

- Enter one work order per line.
- You do not need to edit columns J, K, L, and M (columns with red text). These columns will autofill once you have added information for that row’s work order in the “WO Details” tab.
- This tab is intended to be a list of work orders, and some high-level information about each work order
  - **You will need to enter your work order numbers exactly the same in the “WO List” tab and the “WO Details” tab.** Do not abbreviate, shorten, change, or omit any part of your work order numbers.
  - In Column D, under “Design Performed By”, select the option that is the best fit from the drop down list.

“WO Details” tab:

- Enter the details of each work order. It will likely take more than one line to complete each work order.
  - **You will need to enter your work order numbers exactly the same in the “WO List” tab and the “WO Details” tab.** Do not abbreviate, shorten, change, or omit any part of your work order numbers.
  - When you are entering information for “JOC Materials/Equip Purchases” rows:
    - You do not need a Tax ID Number (*Please include Tax ID Numbers for all other rows*)
    - Select “Prime” under the “Type” column
  - Under Column B “Firm/Company”, you can either make a selection or type the name of a firm (subcontractor).

“Summary” tab:

- Use this tab to see totals and percentages of the work orders. Information will not appear until you start filling out the “WO List” and “WO Details” tab.
- **When your data entry is complete, the “# WO List Count” and “# WO Detail Count” rows (highlighted) MUST have the same number in Column B.** If they do not match after all data is entered the calculation is showing that you have a different total number of work orders on the two tabs. If the two numbers do not match:
  - You may have forgotten to add a work order to your “WO List” tab or your “WO Details” tab.
  - You may have entered a work order number differently in either of the two tabs or on two different lines in the “WO Details” tab.

END OF INSTRUCTIONS