

Instructions for Using the Contract Assessment Worksheet

Using the Worksheet

If using the Contract Assessment Worksheet in Excel 2003, security settings may need to be adjusted to accommodate the use of Macros. In Tools – Security, select “Medium” as the security level setting. If using Excel 2007, a dialog box will appear when the worksheet is opened requesting enabling of macros.

1. Once the worksheet is open, fill out the basic contract information at the top of the form.
2. The 12 risk factors can be completed by selecting the appropriate option button.
3. The “Weight” column is required to be completed for the worksheet to work appropriately.
4. If the answer to the risk factor is unknown or not applicable, the column “Weight” should be designated as “0.”
5. Once the risk factors and weight have been selected, press the “Evaluate” button at the bottom of the worksheet. The Contract Risk will be displayed: Low, Medium, High.
6. Changes to the risk factors can be made once the Contract Risk has been calculated. The Contract Risk will automatically adjust based on any changes.

Customizing the Worksheet

To add more risk factors to the worksheet:

1. Insert new row after Risk Factor #12 (Row 20) and name risk factor.
2. For **Excel 2007**, click the Microsoft Office Button , and then click Excel Options. Click Popular, and then select the Show Developer tab in the Ribbon check box.
 - a. To insert an option button in column C, select “Insert” and under “Active X Controls” select the Option Button. Use the mouse to draw a box in column C with the option button.
 - b. To edit the Option Button text, right click on the option button, select OptionButton Object – Edit and insert the text. The font can be edited by right clicking on the option button and selecting “Properties.” Select the font field and click on the button to the right of the font name. This will allow you to select the font type, style, and size.

- c. Repeat this process in the other two columns.
 - d. Next, right click on the option button in column C and select "Properties." In the LinkedCell field insert the cell "F20." Repeat this process with column D (G20) and column E (H20). Performing this function inserts True or False into those cells which are hidden in the worksheet.
 - e. In the GroupName field in Properties, type Question 13 for each option button. This groups the three option buttons together so more than one option button cannot be selected.
 - f. Note: When editing option buttons, ensure the "Design Mode" button in the Developer tab is selected. If you are not in "Design Mode" and the option button is selected, right click on the option button, select Properties, and type "False" in the Value field. This will remove the highlight from the option button.
 - g. In Sheet2, insert a new row between rows number 12 and 13 (the last row are the totals for all of the rows). Copy cells 12a through f and paste into row 13.
 - h. Back in Sheet1, select "Record Macro" in the Developer tab. Name the Macro "Evaluate2" and press OK. Click in cell D23 (where the contract risk will be displayed). In the formula bar type "=VLOOKUP()." Click the mouse in the parenthesis, select cell A16 in Sheet2, insert comma, select cells A19 through B21, insert comma, and a 2. The formula should display: VLOOKUP(Sheet2!A16, Sheet2!A19:B21, 2). Press return and hit the "Stop Recording" button on the toolbar.
 - i. Insert the mouse in cell D23 and press "Delete."
 - j. Ensure you are still in Design Mode and right click on the Evaluate button. Click on "Assign Macro", select "Evaluate2" and press OK.
3. The steps above can be repeated to add more risk factors to the worksheet.