

Adding and Maintaining Pay Items

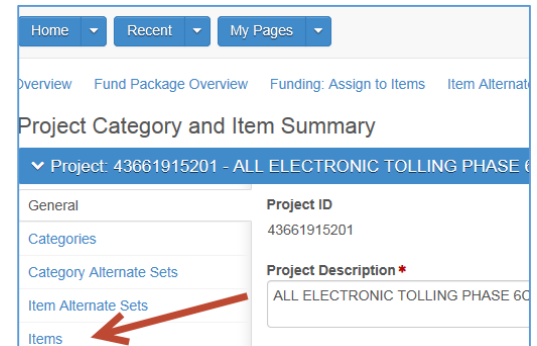
As you have observed, there is a hierarchical relationship involving Proposals, Projects, Categories, and Items. Projects are subordinate to Proposals. Categories are subordinate to Projects. Pay Items are subordinate to Categories.

Depending on how many items you want to add, you may choose from four methods:

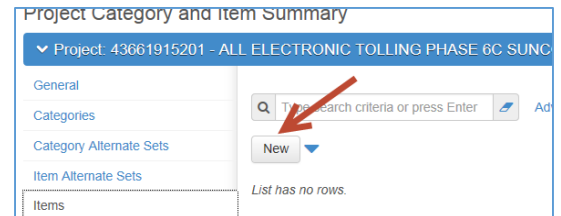
- New Project Item**
- Quick Add Items**
- Select Items**
- Project Item Worksheet**

To use the **New Project Item** screen.

At the General page of the Project, click on the “Items” Tab.

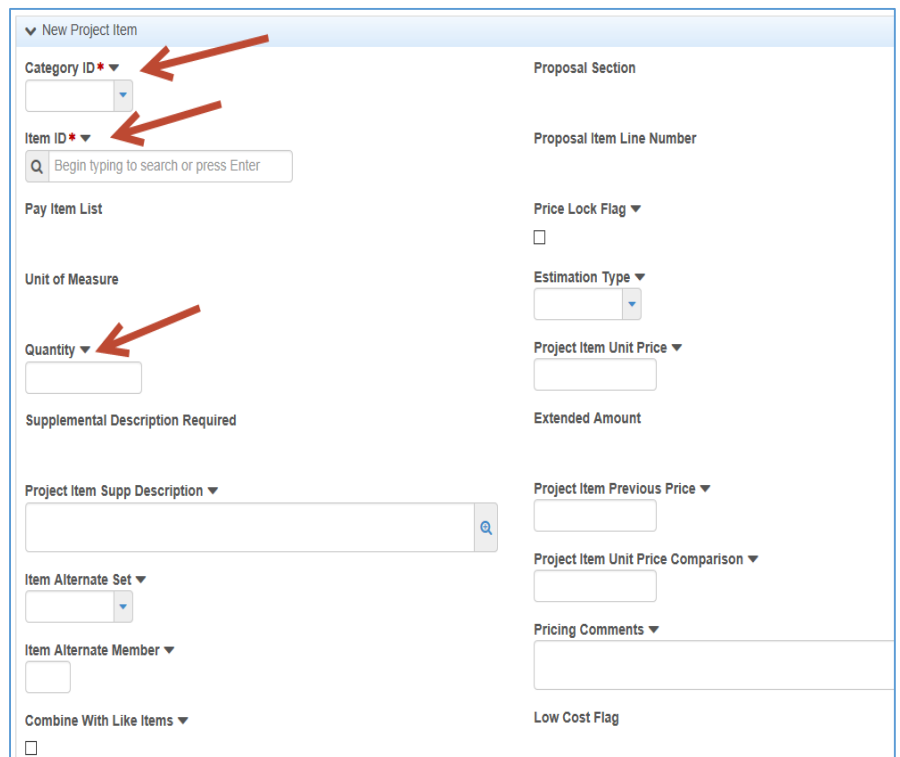


Click the “NEW” button



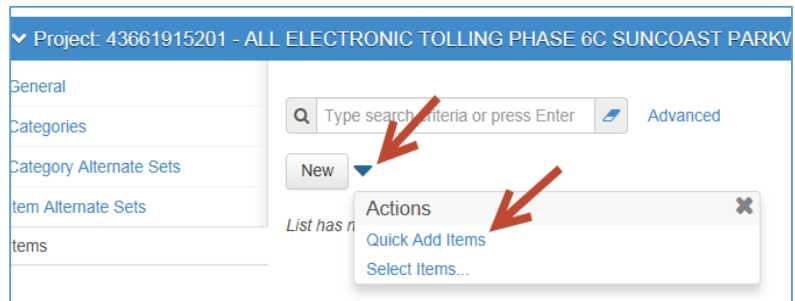
The **New Project Item** screen will open. Note that **Category ID *** and **Item ID *** (Pay Item Number) are required fields. These two fields assist in maintaining the hierarchical relationship.

Of the 29 fields displayed on this screen only three are needed initially. The two required fields and the Quantity.



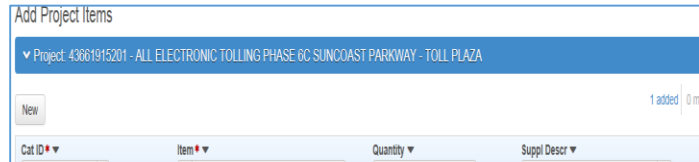
To Use the **Quick Add Items** Method

Instead of Clicking the “**New**” noted above, click the blue triangular Action Button, then click **Quick Add Items**

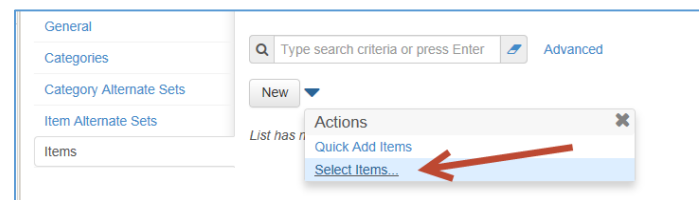


A screen appears containing only four fields, the two required fields plus Quantity and Supplemental Description.

Enter the category via the dropdown and enter the Pay Item by typing its value. Enter an appropriate Quantity and a Supplemental Description if it is appropriate

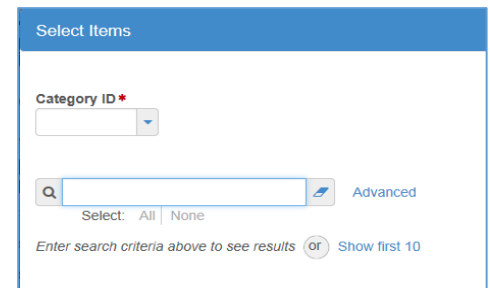


To use the **Select Items** process, click the blue triangular Action Button, then click **Select Items**



This screen will appear.

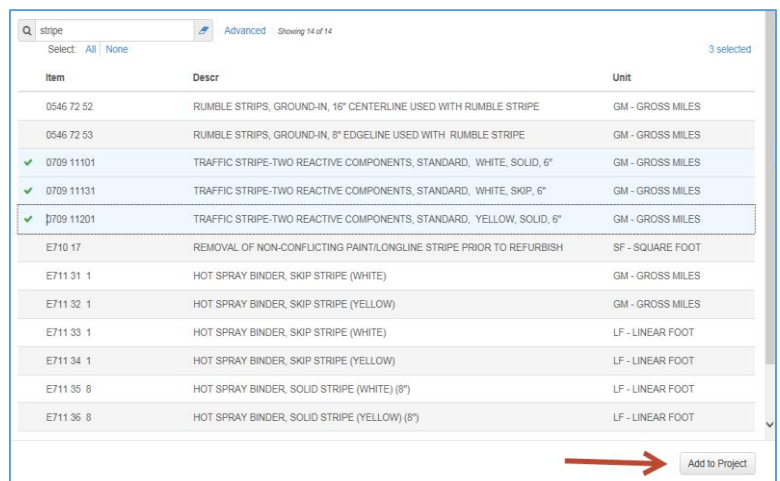
- Select the category using the dropdown
- Enter a fragment of the pay item number or description



An example would be select Category 0200 and you enter ‘Stripe’ as a description fragment.

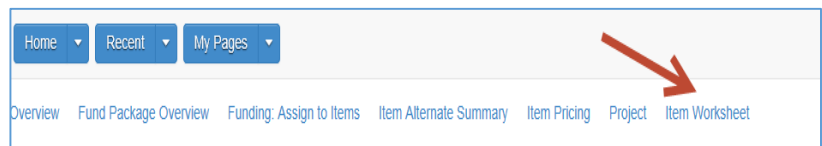
Highlight the rows needed and a green check mark appears.

When you have checked all that are wanted, click **Add to Project** at the bottom of the screen. All checked items will be added to the Project and Category. Repeat this step for other items and categories as needed.



The fourth method is to add items in the **Item Worksheet**.

Click the link **Item Worksheet**.



This screen will appear. In this particular case no items pre-exist. Items may be added one of two ways. Click on the **New Items** box to add items one at

a time similar to the method shown above. Click on the **Select Items** box to select several items at a time, similar to what has been described above.

The screenshot shows the top section of a software window titled "Project Item Worksheet". It includes a "Save Complete" button in a green box. Below this is a project title bar: "Project: 43661915201 - ALL ELECTRONIC TOLLING PHASE 6C SUNCOAST PARKWAY - TOLL PLAZA". Underneath is a "Project Item Total" section with a search bar and a "System Default" dropdown. At the bottom of this section are "New Item" and "Select Items..." buttons. On the right side, there are status indicators: "0 added", "0 marked for deletion", and "0 changed".

The **New Item** choice yields this screen. Double Click the orange colored **Cat ID** field.

This screenshot shows the "New Item" screen. It features a table with columns: "Cat ID", "Proj Line Num", "Item", "Descr", "Units", "Quantity", "Price", "Est Amt", and "Supp Descr". The "Cat ID" column has an orange background. Below the table are "New Item" and "Select Items..." buttons. On the right, there are status indicators: "1 added", "0 marked for deletion", and "0 changed".

A small window will pop out. Enter the value of the desired Category. Click enter on the keyboard and it will be saved.

This is a small pop-up window for entering a "Category ID". It has a search bar with the text "Type search criteria or press Enter" and a "System Default" dropdown. Below the search bar is a text input field containing "0200". At the bottom are "New Item" and "Select Items..." buttons.

Double Click on the **Item*** field and another small window will pop out. Enter a partial pay item number or partial description and a list will appear. Choose the appropriate value.

This screenshot shows a pop-up window for selecting an item. It has a search bar with the text "Type search criteria or press Enter" and a "System Default" dropdown. Below the search bar is a text input field containing "stripe". A list of items is displayed below the search bar, with the first three items highlighted: "0709 11101", "0709 11131", and "0709 11201". At the bottom are "New Item" and "Select Items..." buttons.

Choosing the **Select Items** button will result in this window with two input areas. For **Category ID *** enter the Category Number. Alternatively, click on the box and press Enter on the keyboard. Pressing enter will produce a list window of all categories on the project. Select the one that is needed.

This screenshot shows the "Select Items" window. It has a "Category ID *" field with a search bar and a "System Default" dropdown. Below the search bar is a text input field containing "0200". A list of categories is displayed below the search bar, with the first two categories highlighted: "0200" and "Roadway". At the bottom are "New Item" and "Select Items..." buttons.

Similarly, for the **Item field** type part of the ID or description and a short list will open. If you press Enter on the keyboard while on this field, the complete master item list will appear. Choose the items needed and then click **Add to Project** at the bottom right corner of the screen and all items checked will be entered.

This screenshot shows a window for selecting items. It has a "Category ID *" field with a search bar and a "System Default" dropdown. Below the search bar is a text input field containing "0200". A list of items is displayed below the search bar, with the first five items highlighted: "030 1", "050 1", "050 2", "050 4", and "050 5". At the bottom are "New Item" and "Select Items..." buttons.

To either change item Quantity or delete a Pay Item, begin at either the Project Item Worksheet or the item list at the Categories and Items Tab.

Project Item Worksheet

Go to the row of interest. Double Click the Quantity field and a window will pop out. Change the value as necessary. Click save on the blue banner. The change is complete.

0200	0040	0425 2 91	MANHOLES, J-8, <10'	EA	8.000	5,611.21000	44,889.68
0200	0045	0430174118	PIPE CULVERT, OPTIONAL MATERIAL, ROUND, 18"SD	LF	367.000	65.20000	23,928.40
0200	0050	0430174136	PIPE CULVERT, OPTIONAL MATERIAL, ROUND, 36"SD	LF	98.000	190.68000	18,686.64
0200	0055	0430174160	PIPE CULVERT, OPTIONAL MATERIAL, ROUND, 60"SD	LF	666.000	201.67000	134,312.22
0200	0060	0430982125	MITERED END SECTION, OPTIONAL ROUND, 18" CD	EA	8.000	999.94000	7,992.32

To delete a Pay Item click the blue triangular action button on the right edge of the row of interest. A window will pop out. Select the Trash Can, then click Save on the blue banner and the row will be deleted.

0200	0040	0425 2 91	MANHOLES, J-8, <10'	EA	8.000	5,611.21000	44,889.68	Mark for Deletion
0200	0045	0430174118	PIPE CULVERT, OPTIONAL MATERIAL, ROUND, 18"SD	LF	367.000	65.20000	23,928.40	
0200	0050	0430174136	PIPE CULVERT, OPTIONAL MATERIAL, ROUND, 36"SD	LF	98.000	190.68000	18,686.64	
0200	0055	0430174160	PIPE CULVERT, OPTIONAL MATERIAL, ROUND, 60"SD	LF	666.000	201.67000	134,312.22	
0200	0060	0430982125	MITERED END SECTION, OPTIONAL ROUND, 18" CD	EA	8.000	999.94000	7,992.32	

Item List

From the Item List on the Categories and Items tab

Click the arrow on the left side of the row of interest and the detail will display

Click in the Quantity field and change the value as appropriate.

Click Save on the blue banner to save the work.

Category Alternate Sets

Item Alternate Sets

Items

New

Category:0200 - 0005

0110 1 1 - CLEARING & GRUBBING

Proposal Section: - 3.850 AC - ACRE

Category:0200 - 0010

0110 4 - REMOVAL OF EXISTING CONCRETE PAVEM

Proposal Section: - 513.000 SY - SQUARE YARD

Category:0200 - 0015

0110 7 1 - MAILBOX, F&I SINGLE

Proposal Section: - 36.000 EA - EACH

Category ID

0200 - Roadway

Item ID

Q 0110 7 1

MAILBOX, F&I SINGLE

Pay Item List

13 - Item List Year 2013

Unit of Measure

EA

Quantity

36.000

Supplemental Description Required

No

Proposal Section

Proposal Item Line Number

Price Lock Flag

☐

Estimation Type

Reference

Project Item Unit Price

130.01000

Extended Amount

4,680.36

To delete a Pay Item Click the blue triangular action button on the edge of the row. Click Delete in the pop out window. Click Save in the blue banner to save the work.

>	Category:0200 - 0015	Proposal Section: -
	0110 7 1 - MAILBOX, F&I SINGLE	36.000 EA - EACH
>	Category:0200 - 0020	Proposal Section: -
	0110 8 - UNDERWATER DEBRIS REMOVAL	5.000 DA - DAY
>	Category:0200 - 0025	Proposal Section: -
	0110 8 1 - UNDERWATER DEBRIS REMOVAL	35.000 TN - TON
>	Category:0200 - 0030	Proposal Section: -
	0425 1321 - INLETS, CURB, TYPE P-2, <10'	36.000 EA - EACH

Actions

Delete

Duplicate Row

Exclude from Search Results

Insert Row

Views

Attachments

After the project is associated to a proposal, the process [Auto Generate Sections](#) should be run after making item changes in any of the projects.