

# Add Edit Delete Containers

Project and Program Delivery Manual Chapter 5.2 Setting up a new estimate Originally Issued: 11-07-24 Revised:xx-xx-xx

Below shows the default containers that will be available once a Bid Estimate has been created.

	PLANNING		ITEM LIST		
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1	+ Project Phases		🖭 🛅 Roadway Items	Roadway Items	
2	<ul> <li>My Tasks (0)</li> </ul>		🖭 🛅 Roadside Items	Roadside Items	
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24	I Schedule		া 🛅 Traffic Sign Items	Traffic Sign Items	
	Schedule Task Request		া 🎦 Traffic Signal Items	Traffic Signal Items	
<b>\$</b>	+ Documents		🗉 🛅 Trail Items	Trail Items	
	Document Search		🕂 🛅 Landscaping Items	Landscaping Items	
	+ Budget Management				
	- Bid Estimate Information				
	— (119) - PCC Pavement - Grade a				
	<ul> <li>Bid Management</li> </ul>				
	Estimate Items				
	E Dian kanna				

- Plan Items
- Bid Estimate Report Gallery
- + Commitments & Expenses

### Add A Container

To add a container, click the "New" button at the top of the screen and select "New Container" from the dropdown list.

	PLANNING	ITEM LIST		
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а	🗂 030-08-US 30 Intersection Improv	🕆 New Container	T	T
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	Document Search			
	+ Budget Management			
	- Bid Estimate Information			
	— (119) - PCC Pavement - Grade a			
	<ul> <li>Bid Management</li> </ul>			
	Estimate Items			
1	Plan Items			
	= Bid Estimate Report Gallery			

#### Add A Container (cont.)

Once the Container screen appears, note several fields highlighted below that should be filled out.

**Container** (required): Enter a name for the new container in this field. \*\*Note that this is a required field (\*\*") and necessary to be filled out.

**Container Estimator** (optional): A dropdown list of available names who have been assigned to this project. This is an optional field that can be filled in with the user who should be developing the estimate for this container.

**Description** (optional): "City Division" is an example of what could be placed in this field to denote that this container with be composed of the items to be paid for by a city.

Once the user has completed this form, click the Save & Exit at the top of the screen to create the container.

MAST	ERWORKS	
	PLANNING	CONTAINER
Q	Type to Search X X	Save & Exit Save & Continue Save & Cancel
	Recent Projects	Container *:
<b>1</b> 3	aloo 030-08-US 30 Intersection Improv	Container ID :
1.	+ Project Phases	Design Number 🗧 :
R	My Tasks (0)	Design Number County :
9.	+ Resource Management	Existing Asset ID :
	Schedule	Container Estimator : Select One
	Schedule Task Request	Is Alternate :
٩	+ Documents	Description :
	Document Search	
	+ Budget Management	
	<ul> <li>Bid Estimate Information</li> </ul>	
	<ul> <li>(119) - PCC Pavement - Grade a</li> </ul>	
	Bid Management	
	Estimate Items	
	Plan Items	
	= Bid Estimate Report Gallery	

Bid Management
 Estimate Items
 Plan Items

= Bid Estimate Report Gallery

The new container should now be available in the Plan Items area.

	PLANNING		_	ITEM LIST		
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a	🛅 030-08-US 30 Intersection	Improv		T		
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	+ Resource Management			🕂 🛅 Erosion Control Items	Erosion Control Items	
2.	= Schedule			+ Traffic Sign Items	Traffic Sign Items	
11	Schedule Task Request			+ Traffic Signal Items	Traffic Signal Items	
ø	+ Documents			Landscaping Items	Landscaping Items	
	Document Search			Demonstration		
	+ Budget Management					
	- Bid Estimate Information					

#### **Edit A Container**

To edit a container, mark the checkbox next to the container to be edited and click "Edit" on the top of the screen.

PLANNING		ITEM LIST						
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1	Recent Projects		Name		Item Description	Suppl. Descriptions		
	1030-08-US 30 Intersection Improv			T				
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	+ Resource Management		🕂 🛅 Erosion Control Items		Erosion Control Items			
	Schedule		\pm 🛅 Traffic Sign Items		Traffic Sign Items			
3	Schedule Task Request		🕂 🛅 Traffic Signal Items		Traffic Signal Items			
	+ Documents		🖭 🛅 Landscaping Items		Landscaping Items			
	Document Search		E T Demonstration	:				
	+ Budget Management							
	- Bid Estimate Information							
	— (119) - PCC Pavement - Grade a							
	<ul> <li>Bid Management</li> </ul>							
	Estimate Items							
	Plan Items							
	= Bid Estimate Report Gallery							

Once the Edit Container form appears, edit any of the allowable information in the form. Click "Save & Exit" when editing is finished.

PLANNI	NG	EDIT CONTAINER
Type to Search	× × ^	Save & Exit Save & Continue (*) Cancel
Recent Projects		Container *: Demonstration
🗂 030-08-US 30	Intersection Improv	Container ID : 8
+ Project Phase	5	Design Number :
My Tasks (0)		Design Number County :
+ Resource Ma	nagement	Existing Asset ID :
Schedule		Container Estimator : Select One
Schedule Tas	k Request	Is Alternate :
+ Documents		Description :
Document Se	arch	
+ Budget Mana	gement	
— Bid Estimate	Information	
— (119) - PCC	Pavement - Grade a	
= Bid Mar	agement	
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Plan Ite	ms	



**NOTE:** Container edits will be reflected in iPDWeb after clicking "Refresh MWLive". (Refer to chapter <u>5.2.2.2 Estimate Items MW Connection</u> for additional information.)

#### Delete A Container

To delete a container, click the checkbox next to the container that is to be deleted. Click "Delete" at the top of the screen.

PLANNING	ITEM LIST					
Type to Search X X	🖓 New - 📓 Save 🧳 Edit 👁 View 🚺	💮 More 🕶				
Recent Projects	Name	Item Description	Suppl. Descriptions			
all 030-08-US 30 Intersection Improv	T	<b>1</b>				
+ Project Phases	🔲 🗉 🛅 Roadway Items	Roadway Items				
<ul> <li>My Tasks (0)</li> </ul>	Roadside Items	Roadside Items				
+ Resource Management	📄 🕂 🛅 Erosion Control Items	Erosion Control Items				
Schedule	Traffic Sign Items	Traffic Sign Items				
Schedule Task Request	📄  💼 Traffic Signal Items	Traffic Signal Items				
+ Documents	🔽 🗉 🛅 Trail Items 🚦	Trail Items				
Document Search	Landscaping Items	Landscaping Items				
+ Budget Management						
- Bid Estimate Information						
— (119) - PCC Pavement - Grade a						
<ul> <li>Bid Management</li> </ul>						
Estimate Items						
Plan Items						

A window will appear asking if you want to delete the selected record. Clicking "OK" will delete the container. Clicking "Cancel" will exit out of the process.



NOTE: After a container is deleted from Masterworks, the container and its estimate will also be deleted in iPDWeb when the user clicks "Refresh MWLive". (Refer to chapter <u>5.2.2.2 Estimate Items MW Connection</u> for additional information.)

## Chronology of Changes to Manual Section:

5.2.1.2 Add Edit Delete Containers