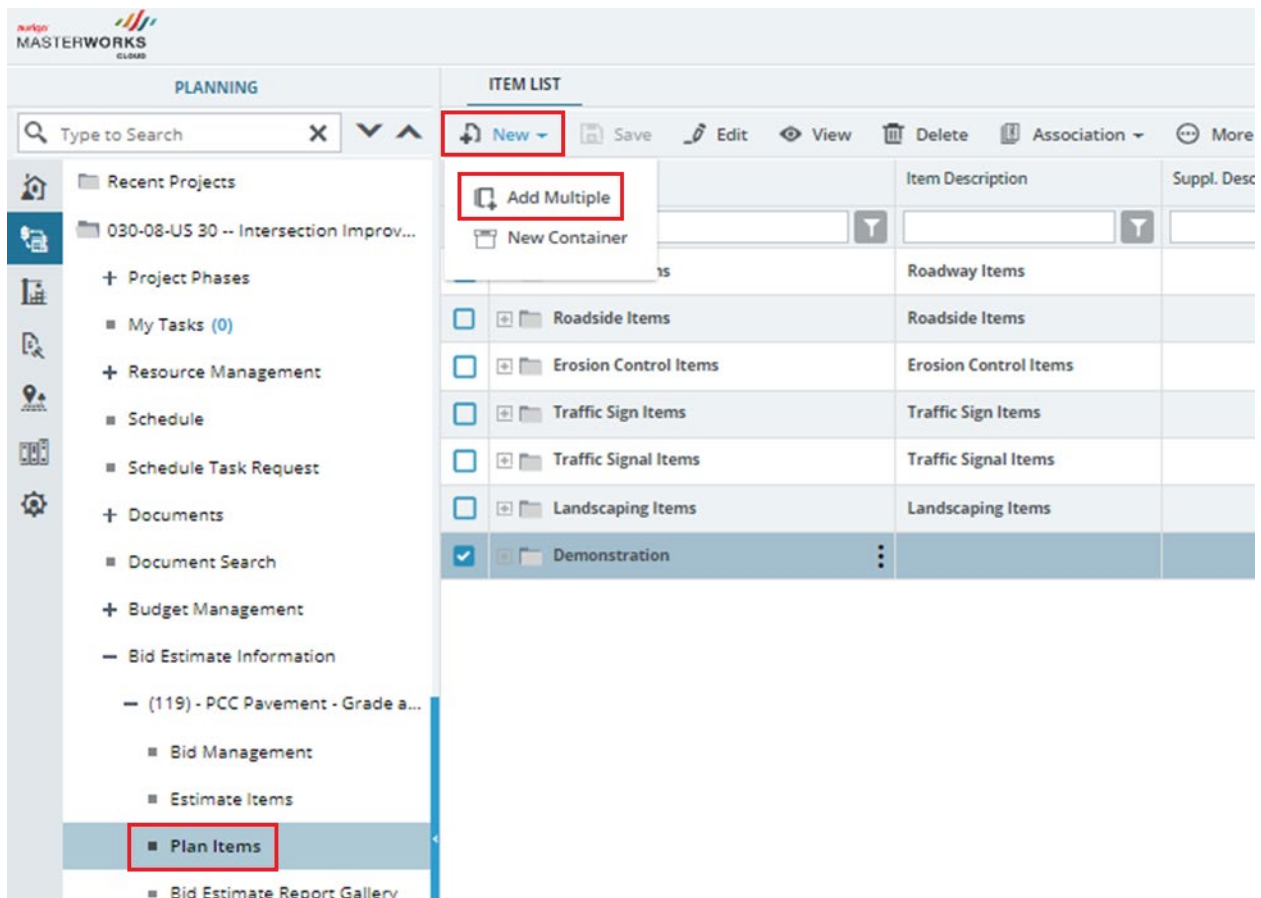# Add or Delete Plan Items

Plan items and quantities should be added to a project through Masterworks. This will allow the items to transfer to iPDWeb for creating cost estimates and will also provide data to various Bureaus at the department for reporting. Plan items and quantities are required to be entered in Masterworks to allow letting activities to commence.

Add Plan Items

To add plan items, navigate to the Bid Estimate Information area and select "Plan Items" under the appropriate phase number. Next, mark the checkbox to the left of the container where plan items are to be added. Click on "New" at the top of the page and select "Add Multiple" from the drop-down list.

The Add Standard Items form should appear. Click "Add" at the top of the screen.

The Standard Items dialog box should open. From this dialog, items can be filtered by category by clicking on the filter buttons. If you single click the column heading it will sort by that column.

Items can be filtered by various categories. In this example, the user is filtering by Description. "Pavement" was typed into the first field. Clicking "Filter" then populated all items with the word "pavement" in the description.

Mark the checkbox to the left of the item(s) that are to be added. Then, click "Select". *Note: Multiple items can be marked with the checkbox before clicking "Select".*

The Add Standard Items screen should now show the items that were selected. The "Add" button will open the Standard Item dialog box and allow more Standard Items to be added to the list. If erroneous items are populated in the list, the user can remove them by selecting them and clicking on the "Remove" button at the top of the screen. When finished, click the "Save" button at the top of the screen to save all the work. Failing to "Save" will lose all of the changes once you navigate away from the form.

Once the plan items have been saved, the Item List form will appear with the plan items. To add/adjust the item quantity, double click in the Quantity cell for each item and enter the desired quantity. To save changes, click "Save" at the top of the screen.

Delete Plan Items

To delete a plan item, mark the checkbox next to the item that should be deleted and click "Delete" at the top of the screen. A dialog will pop up asking "Are you sure you want to Delete the selected records?". Click "OK" to delete, or "Cancel" to exit the delete operation.

Chronology of Changes to Manual Section:

5.2.1.3 Add or Delete Plan Items

11/07/2024	NEW
09/03/2025	Removed Header on pages.
	Check Accessibility.