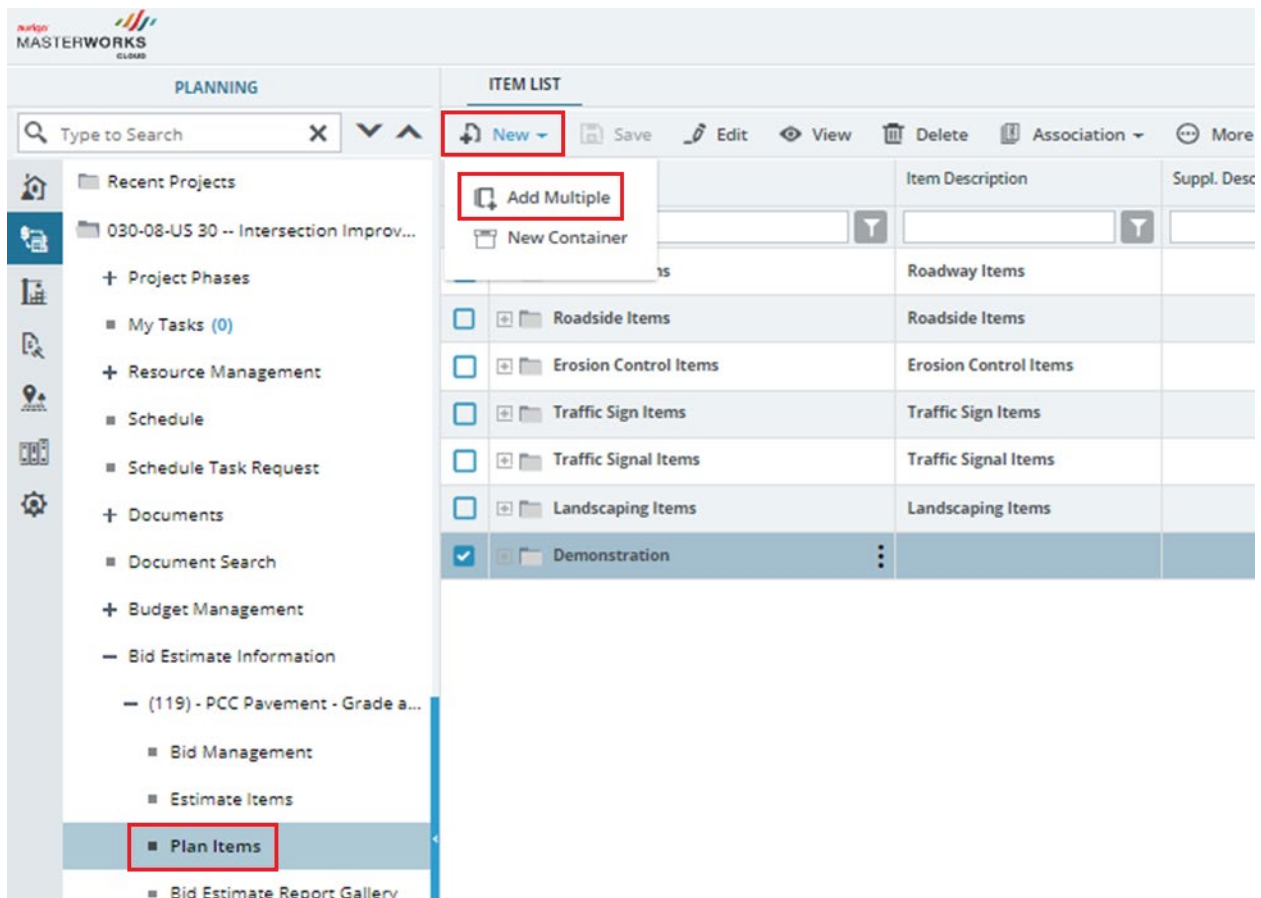


Add or Delete Plan Items

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 screenshot shows the Masterworks Cloud interface. On the left, a sidebar contains a navigation menu with options like 'Recent Projects', 'Project Phases', 'My Tasks (0)', 'Resource Management', 'Schedule', 'Schedule Task Request', 'Documents', 'Document Search', 'Budget Management', 'Bid Estimate Information', and 'Plan Items' (which is highlighted with a red box). The main area is titled 'ITEM LIST' and features a toolbar with buttons for 'New', 'Save', 'Edit', 'View', 'Delete', 'Association', and 'More'. The 'New' button is highlighted with a red box, and its dropdown menu is open, showing 'Add Multiple' (also highlighted with a red box) and 'New Container'. Below the toolbar, a table lists various item categories: 'Roadway Items', 'Roadside Items', 'Erosion Control Items', 'Traffic Sign Items', 'Traffic Signal Items', 'Landscaping Items', and 'Demonstration' (which is checked with a blue box). The table has columns for 'Item Description' and 'Suppl. Desc'.

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

MASTERWORKS CLOUD

PLANNING

Type to Search

Recent Projects

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+ Project Phases

■ My Tasks (0)

+ Resource Management

■ Schedule

■ Schedule Task Request

+ Documents

■ Document Search

+ Budget Management

— Bid Estimate Information

— (119) - PCC Pavement - Grade a...

■ Bid Management

■ Estimate Items

■ **Plan Items**

■ Bid Estimate Report Gallery

+ Commitments & Expenses

ADD STANDARD ITEMS

Save Cancel **Add** Remove

Standard Item list: Bid Items

☒ Use Pay Item No. Groups ☐ Use Group: Default

	Pay Item No.	Description	Container
No Data available.			
1			

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.

Standard Items

0 selected of total 3,699

Select All Records

<input type="checkbox"/>	Pay Item No.	Description	Ali
<input type="checkbox"/>	2503-0136542	STORM SEWER GRAVITY MAIN WITH CASING PIPE, TRENCHED, 3000D LOW...	No
<input type="checkbox"/>	2524-9275100	WOOD POSTS FOR TYPE A OR B SIGNS, 4 IN. X 4 IN.	No
<input type="checkbox"/>	2524-9275222	WOOD POSTS FOR TYPE A OR B SIGNS, 4 IN. X 6 IN.	No
<input type="checkbox"/>	2503-0116342	STORM SEWER GRAVITY MAIN, TRENCHED, 2000D LOW CLEARANCE CONC...	No
<input type="checkbox"/>	2503-0126348	STORM SEWER GRAVITY MAIN, TRENCHLESS, 2000D LOW CLEARANCE CO...	No
<input type="checkbox"/>	2503-0126354	STORM SEWER GRAVITY MAIN, TRENCHLESS, 2000D LOW CLEARANCE CO...	No
<input type="checkbox"/>	2503-0126360	STORM SEWER GRAVITY MAIN, TRENCHLESS, 2000D LOW CLEARANCE CO...	No
<input type="checkbox"/>	2503-0126372	STORM SEWER GRAVITY MAIN, TRENCHLESS, 2000D LOW CLEARANCE CO...	No

Select Cancel

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.

Standard Items

0 selected of total 183

Select All Records

<input type="checkbox"/>	Pay Item No.	Description	Already Exists	Unit
<input type="checkbox"/>	2301-1034135	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT,		
<input type="checkbox"/>	2301-1034140	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT,		
<input type="checkbox"/>	2301-1083000	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT,		
<input type="checkbox"/>	2301-1083060	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT,		
<input type="checkbox"/>	2301-1083065	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT,		
<input type="checkbox"/>	2301-1083070	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT,		
<input type="checkbox"/>	2301-1083075	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT,		
<input type="checkbox"/>	2301-1083080	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, CL...	No	SY
<input type="checkbox"/>	2301-1083085	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, CL...	No	SY

Select Cancel

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”.*

Standard Items

1 selected of total 183 Select All Records

<input type="checkbox"/>	Pay Item No.	Description	Already E
<input type="checkbox"/>	2301-1083115	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, CLASS M, CLASS 3 DURABILITY, 11.5 IN.	No
<input type="checkbox"/>	2301-1083120	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, CLASS M, CLASS 3 DURABILITY, 12 IN.	No
<input type="checkbox"/>	2301-1084095	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, CLASS M, CLASS 3I DURABILITY, 9.5 IN.	No
<input type="checkbox"/>	2301-1084100	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, CLASS M, CLASS 3I DURABILITY, 10 IN.	No
<input type="checkbox"/>	2301-1084105	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, CLASS M, CLASS 3I DURABILITY, 10.5 IN.	No
<input type="checkbox"/>	2301-1084110	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, CLASS M, CLASS 3I DURABILITY, 11 IN.	No
<input checked="" type="checkbox"/>	2301-1004095	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, QM-C, CLASS 3I DURABILITY, 9.5 IN.	No
<input type="checkbox"/>	2301-1004100	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, QM-C, CLASS 3I DURABILITY, 10 IN.	No
<input type="checkbox"/>	2301-6911722	PORTLAND CEMENT CONCRETE PAVEMENT SAMPLES	No
<input type="checkbox"/>	2303-6911000	HOT MIX ASPHALT PAVEMENT SAMPLES	No
<input type="checkbox"/>	2317-7000110	PAYMENT ADJUSTMENT INCENTIVE/DISINCENTIVE FOR PCC PAVEMENT SMOOTHNESS (BY SCHEDULE)	No

Select Cancel

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.

MASTERWORKS

PLANNING

ADD STANDARD ITEMS

Save Cancel Add Remove

Standard Item list: Bid Items Use Pay Item No. Groups Use Group: Default

<input type="checkbox"/>	Pay Item No.	Description	Container	Already Exists	Unit
<input type="checkbox"/>	2301-1004095	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, QM-C, CLASS 3I DURABILITY, 9.5 IN.		No	SY
<input type="checkbox"/>	2102-2710070	EXCAVATION, CLASS 10, ROADWAY AND BORROW		No	CY

1

Recent Projects

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+ Project Phases

My Tasks (0)

+ Resource Management

Schedule

Schedule Task Request

+ Documents

Document Search

+ Budget Management

Bid Estimate Information

(119) - PCC Pavement - Grade a...

Bid Management

Estimate Items

Plan Items

Bid Estimate Report Gallery

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.

The screenshot shows the Masterworks software interface. On the left is a navigation pane with a search bar and a list of project categories. The main area is titled 'ITEM LIST' and contains a table of items. At the top of the table, there is a toolbar with buttons for 'New', 'Save' (highlighted with a red box), 'Edit', 'View', 'Delete', 'Association', and 'More'. The table has columns for 'Name', 'Item Description', 'Suppl. Descriptions', 'Unit', 'Quantity', and 'Obsolete'. The 'Quantity' column for the item '2102-2710070' is highlighted with a red box.

Name	Item Description	Suppl. Descriptions	Unit	Quantity	Obsolete
<input type="checkbox"/> [Icon] [Text]					<input type="checkbox"/>
<input type="checkbox"/> [Icon] Roadway Items	Roadway Items				
<input type="checkbox"/> [Icon] Roadside Items	Roadside Items				
<input type="checkbox"/> [Icon] Erosion Control Items	Erosion Control Items				
<input type="checkbox"/> [Icon] Traffic Sign Items	Traffic Sign Items				
<input type="checkbox"/> [Icon] Traffic Signal Items	Traffic Signal Items				
<input type="checkbox"/> [Icon] Landscaping Items	Landscaping Items				
<input type="checkbox"/> [Icon] Demonstration					
<input checked="" type="checkbox"/> [Icon] 2102-2710070	EXCAVATION, CLASS 10, ROADWAY AND BORROW		CY		<input type="checkbox"/>
<input type="checkbox"/> [Icon] 2301-1004095	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, QM-C, CLASS 3I DURABILITY, 9.5 IN.		SY		<input type="checkbox"/>

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.

The screenshot displays the Masterworks software interface. On the left is a 'PLANNING' sidebar with a search bar and a list of project-related items. The 'ITEM LIST' table on the right contains columns for Name, Item Description, Suppl. Descriptions, and Unit. A red box highlights the 'Delete' button in the top toolbar and a checkbox in the first column of the table, next to the item with ID 2102-2710070.

Name	Item Description	Suppl. Descriptions	Unit
<input type="checkbox"/>			
<input type="checkbox"/>	Roadway Items		
<input type="checkbox"/>	Roadside Items		
<input type="checkbox"/>	Erosion Control Items		
<input type="checkbox"/>	Traffic Sign Items		
<input type="checkbox"/>	Traffic Signal Items		
<input type="checkbox"/>	Landscaping Items		
<input type="checkbox"/>	Demonstration		
<input checked="" type="checkbox"/>	2102-2710070	EXCAVATION, CLASS 10, ROADWAY AND BORROW	CY
<input type="checkbox"/>	2301-1004095	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, QM-C, CLASS 3I DURABILITY, 9.5 IN.	SY

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.