

## Manage Reference Data Worksheet

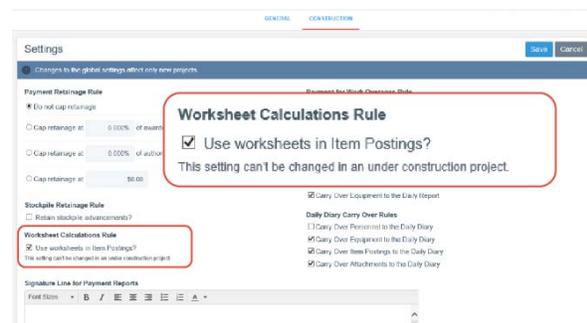
Using worksheets in the Appia® service allows quantities for items in a daily report to be calculated based on the unit of the item. Users enter measurements or variables in order to find the quantity. The worksheet setting must be turned on in order to use these calculations.

For more complete worksheet calculations instructions, please see the online help.

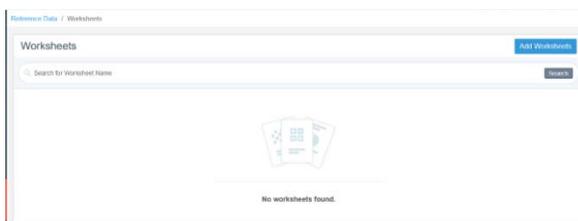
### Construction Settings

The Worksheets Calculations Rule sets whether worksheets will be used for item postings in a daily report. This is set globally for all projects but can be changed at the project level before advancing the project to construction.

1. Select **System Mgt** in the Sidebar menu and click **Settings**.
2. Click the **Construction** tab.
3. Select or clear the Worksheets Calculations Rule check box.
4. Change other settings as necessary.
5. When you are finished, click **Save**. The Appia service applies the construction settings and returns you to the My Projects page.



### Manage Worksheets



The Appia service contains several worksheets for calculating the quantity placed for items in a daily report. You must add the worksheets.

Select **Reference Data** in the Sidebar menu and choose **Worksheets**. The Appia service brings you to the Worksheets page.

### Add Worksheets

You must assign associated items to a worksheet in order to use the calculations for item postings. Worksheets already added to your reference data don't appear in the Add Worksheets list.

1. Click **Add Worksheets**. The Appia service opens the Add Worksheets window with the list of worksheets that have not yet been added to your reference data.
2. Select the worksheets that you will be using.
3. Click **Add**.

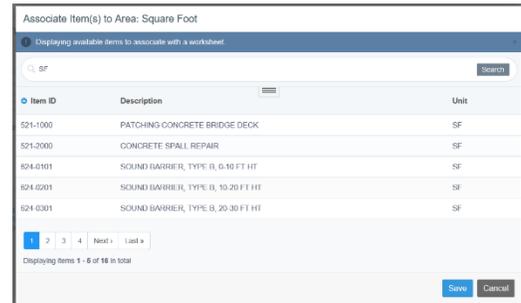
The Appia service adds the selected worksheets to your reference data. Once a worksheet has been added to your reference data, you can associate it with items.

### Associate a Worksheet to an Item

Changing a worksheet in the reference data does not change the calculations using that worksheet in an under construction project. If the worksheet is associated with an item, you will see the association in the item details.

An item can be associated with only one worksheet.

1. Once your worksheet is added from the reference data, click the worksheet name. The Appia service displays the worksheet details.
2. Click **Associate Items**.
3. Enter the search criteria for the item to associate, such as the unit or the item number, in the Search field and click **Search**.
4. Select the items to associate with the worksheet and click **Save**.



The Appia service associates the items with the worksheet and returns you to the Worksheets page.

### Disassociate Items

Once you have the worksheets page open, you can remove items. Changing a worksheet in the reference data does not change the calculations using that item in an under construction project.



1. Select the worksheet name. The Appia service displays the worksheet details and its associated items.
2. Select the check mark for the items you want to disassociate with the worksheet. Click **Select All** to remove all items.
3. Click **Disassociate Items**.

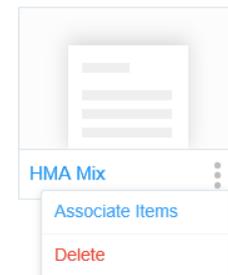
4. Click **OK** in the remove confirmation window.

The Appia service removes the item from the worksheet and returns you to the Worksheets page.

### Delete a Worksheet

Worksheets deleted from the reference data do not affect the worksheets in an under construction project. If you delete a worksheet, you also delete the worksheet's item associations.

1. Click the three dots see the worksheet options for the worksheet you want to delete.
2. Click **Delete**.
3. Click **OK** in the delete confirmation window.



The Appia service deletes the worksheet and returns you to the Worksheets page.

## Manage Project Worksheets

You can add and delete worksheets and manage worksheet items in the Appia® service for an under construction project if the worksheet construction setting is set to **On**.

Select the under construction project from the My Projects page. Select **More** in the Sidebar menu and choose **Worksheets**. Associating and disassociating project items from a worksheet does not affect worksheets in the reference data. You can't remove an item with a worksheet association that has been posted to a daily report.

For more complete worksheet instructions, please see the online help.

### Add Worksheets

You can add any worksheet that has been added to the reference data to your project.

Worksheets that are already part of your project don't appear in the Add Worksheets list.

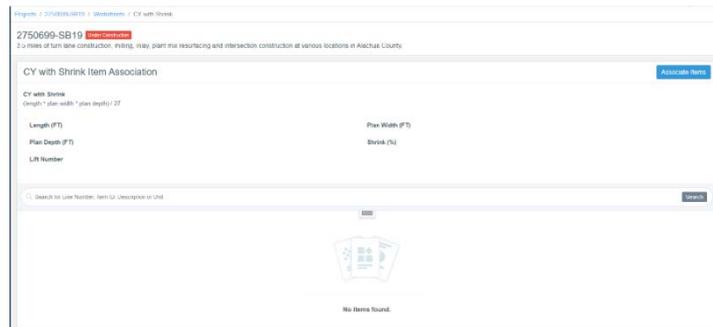
1. Click **Add Worksheets**. The Appia service opens the Add Worksheets window with the list of worksheets that have not yet been added to your project.
2. Select the worksheets you will be using.
3. Click **Add**.

The Appia service adds the selected worksheets to your project. You can associate your project items with the worksheets.

### Associate a Worksheet to an Item

Changing a worksheet in your project doesn't change the worksheet in the reference data. An item can be associated with only one worksheet.

1. With the Worksheets page open, select the worksheet name. The Appia service displays the worksheet details and its associated items.
2. Click **Associate Items**. The Appia service opens a list of project items not yet assigned to a worksheet.



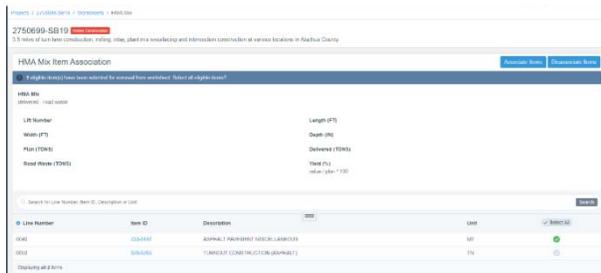
3. Use the Search if necessary to locate the items to add to the worksheet.
4. Select the items to associate with the worksheet and click **Save**.

The Appia service associates the items with the worksheet and returns you to the Worksheets page.

### Disassociate Items

Once you have the worksheets page open, you can remove items. You can't remove an item with a worksheet association that has been posted to a daily report.

1. Select the worksheet. The Appia service displays the worksheet details and its associated items.



2. Select the check mark for the items you want to disassociate with the worksheet. Click **Select All** to remove all items.
3. Click **Disassociate Items**.
4. Click **OK** in the remove confirmation window.

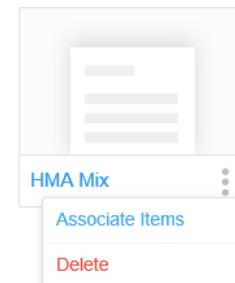
The Appia service removes the item from the worksheet and returns you to the Worksheets page.

### Delete a Worksheet

You can delete a worksheet from your under construction project if items in the worksheet haven't been added to a daily report. You will not see the delete option if you can't delete the worksheet.

Worksheets deleted from a project do not affect the worksheets in the reference data. If you delete a worksheet, you also delete the worksheet's project item associations.

1. Click the three dots see the worksheet options for the worksheet you want to delete.
2. Click **Delete**.
3. Click **OK** in the delete confirmation window.



The Appia service deletes the worksheet and returns you to the Worksheets page.