

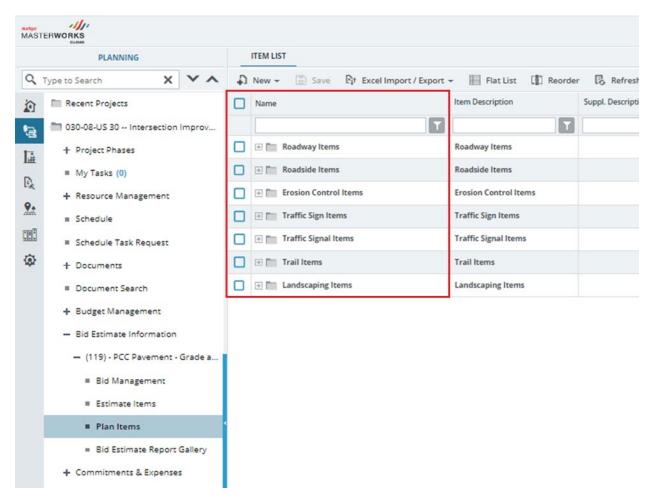
5.2.1.2

Add Edit Delete Containers

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

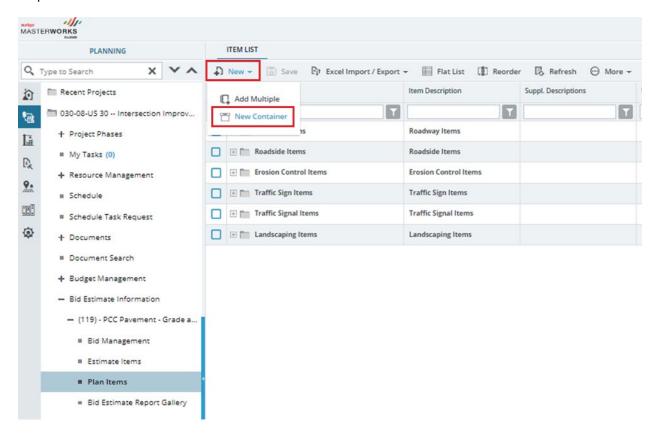
Revised: xx-xx-xx

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



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.



Add A Container (cont.)

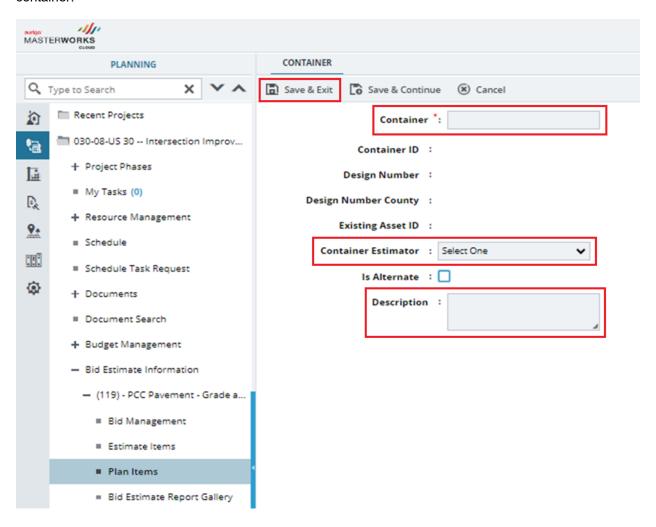
Once the Container screen appears, note several fields highlighted below that should be filled out.

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.

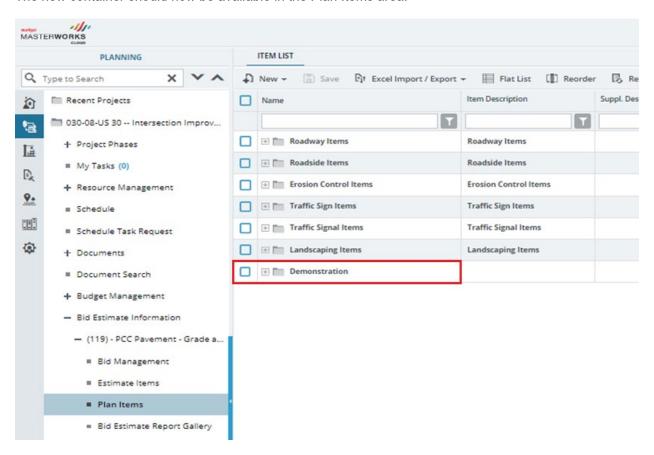
Container Estimator (optional): A dropdown list of available names who have been assigned to this project. This is an optional field that can be filled in with the user who should be developing the estimate for this container.

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.

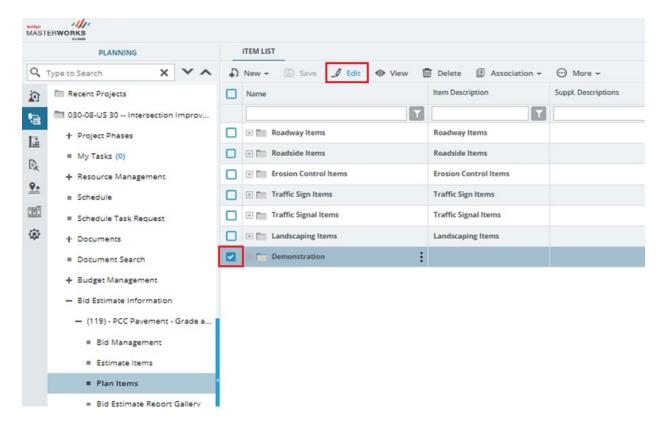


The new container should now be available in the Plan Items area.

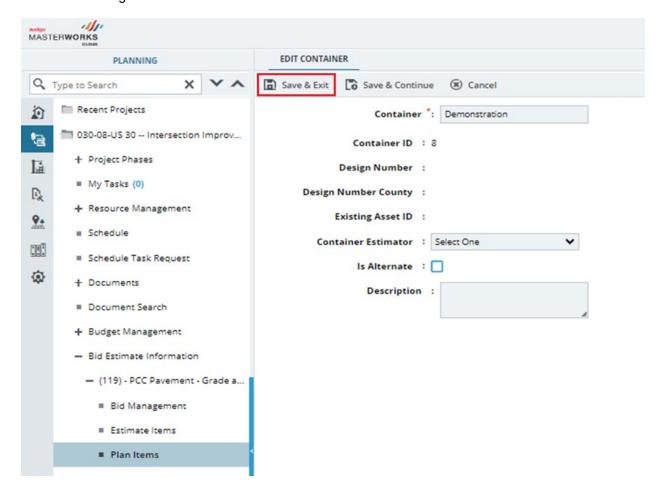


Edit A Container

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



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

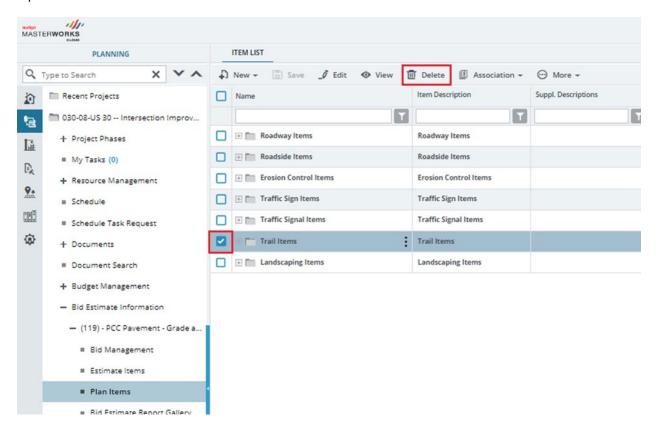




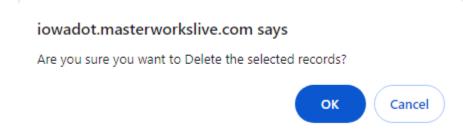
NOTE: Container edits will be reflected in iPDWeb after clicking "Refresh MWLive". (Refer to chapter <u>5.2.2.2 Estimate Items MW Connection</u> for additional information.)

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.



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 5.2.2.2 Estimate Items MW Connection for additional information.)

Chronology of Changes to Manual Section:

5.2.1.2 Add Edit Delete Containers

11/07/2024 NEW