# 1.6 Adding Items

## Background:

Items are added to the project and associated to a category. There are two ways to add items to the project. The Item Worksheet and the Items tab.

## Roles:

Project User, Proposal User

## Navigation:

Project Overview > Project > Project Summary

*Adding Items using the Item Worksheet*

1. From Project Summary, select the **Item Worksheet** quick link.
2. Click the **Select Items** button.
3. In the **Category ID** autocomplete select the Category.
4. Use the search field to Search for and select the item(s) you want to add, a green checkmark will appear next to the selected items.
5. Click the **Add to Project** button.
6. Click **Save**.

*Enter the remaining fields into the worksheet.*

7. If not already populated when adding items double click the **Category ID** field, search for and select the appropriate category for the item.

Note: Instead of double-clicking in each field in the item worksheet, you can Tab into the next field, hit Enter to open the field, enter the value and Tab to the next field

8. Enter a **Bid Schedule Supplemental Description** if necessary or required (project items with a Bid Schedule Supp Description cannot roll up).
   a. Double click and enter a **Roll Up Supplemental Description** if there are multiples of the same pay item that will be rolled up into one item for bidding. This field does not appear on the bid schedule, but will appear in Construction when inspectors are reporting on and paying for quantities. Note: Must be used in conjunction with the **Combine Like Items** field
   b. Double click and check the **Combine Like Items** field if there are multiples of the same pay item that will be rolled up into one item for bidding. Note: Must be used in conjunction with the **Roll Up Supplemental Description** field.

Note: If a rolled-up item also needs a bid schedule supplemental description, this can be added in Proposal once the project item has become a proposal item.

9. Enter the quantity for the item in the **Quantity** field. If it is a lump sum item the quantity will be 1. If it is a contingent sum item enter the total estimated item cost in the **Quantity** field.
10. Enter the estimated unit price for the item in the **Price** field, unless it is a contingent sum item. If you are entering a contingent sum item enter a **Price** of 1.
11. Click **Save**.

Note: The Extended Amount field will calculate once you save.

# 1.6 Adding Items

## *Adding Items using the Items tab*

1. From Project Summary, select the **Categories and Items** quick link.
2. Select the **Item** tab.
3. Click the **New** button.
4. Enter the **Item ID**, **Quantity**, **Project Item Unit Price**, **Category ID** and, if appropriate, the **Bid Schedule Supplemental Description** (see notes in steps 8-10 for additional information about how those fields should be populated based on the type of item you are adding).

5. If you are adding a Lump Sum item enter Alternate Calculation for lump sum, including the **Alternate Quantity**, **Alternate Unit of Measure** and **Alternate Unit Price**.

6. Click **Save**.

Note: If you are adding a Lump Sum item, be sure to fill in the **Alternate Quantity**, **Alternate Unit of Measure** and **Alternate Unit Price** fields. The Alternate Calculation for Lump Sum items is important for understanding your Lump Sum amount.

## Next Steps:

See QRG: *Adding Funding*