# 8. MANAGING CATEGORY ITEMS

Project items are maintained at the category level in Trns·port. Items are added or changed on the Worksheet tab of the Projects tabbed folder window. The worksheet contains all of the project item information in a grid. Items cannot be created until the category has been created.

8.1 Customizing the Worksheet

The worksheet consists of many columns which can be viewed only by scrolling to the right. It is helpful to know techniques to customize this screen to your preference.
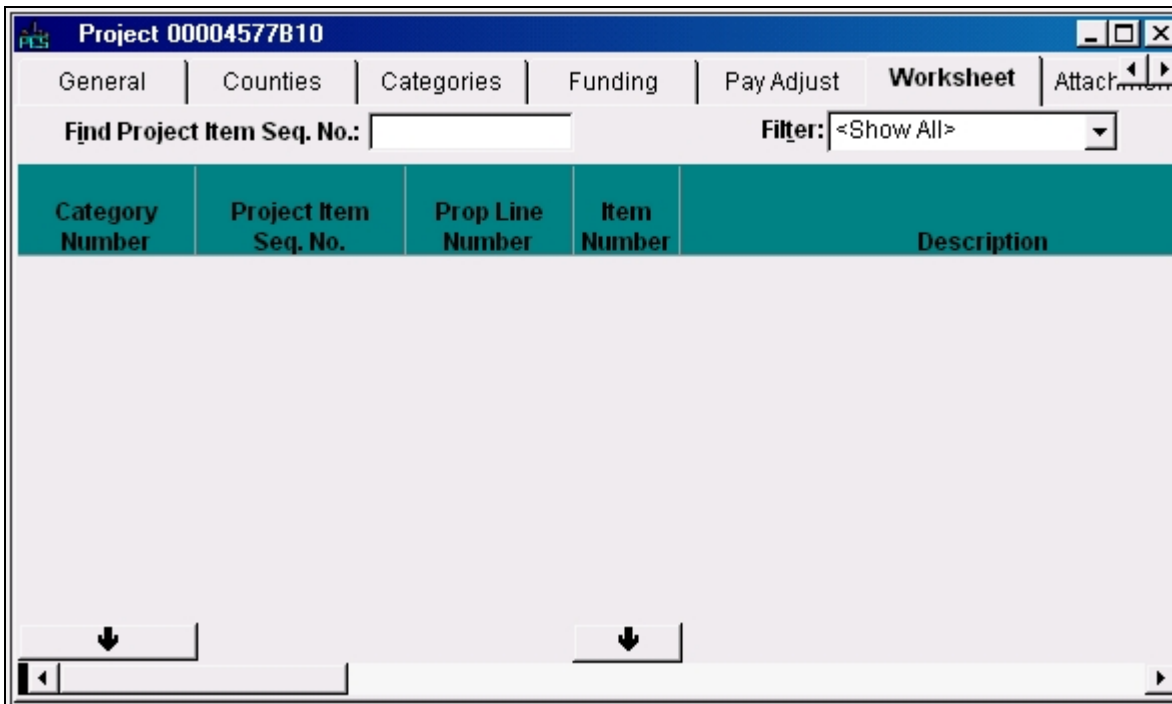
8.1.1 Changing the Width of Columns in the Worksheet

The width of the columns can be adjusted. Place your mouse on the narrow vertical strip which separates two columns. The pointer will become a double-headed arrow. Drag the column left or right to make it wider or narrower.

8.1.2 Changing the Order of Columns in the Worksheet

Columns may be moved into a different order placement. Click on a column heading and hold down with the mouse. An I-bar will appear, running from top to bottom of the entire column.

Still holding down, drag the column to the desired location and release. See 8.1.3 for the Suggested Order for Columns in the Worksheet.

## 8.1.3 Suggested Order for Columns in the Worksheet

The following listing is the suggested order for arrangement of the columns of the Worksheet. You will need to arrange the columns only once. Thereafter, each time Trns·port is launched, the columns will retain this ordering.

1. Category Number
2. Project Item Seq. No.
3. Prop. Line No.
4. Item Number
5. Description
6. Lump Sum Units
7. Units

8. Estimate Quantity
9. Estimated Unit Price
10. Extended Amount
11. NS Desc & Spec Book # Req'd
12. Description (Non-std)
13. Spec Book # (Non-std)
14. Margin Code

15. Non-Bid Item
16. Source of Price
17. Estimated Price Lock
18. Revised Price
19. Combine With Like Items

8.1.4 Split Horizontal Scrolling in the Worksheet

You can divide a grid into two regions that scroll independently of each other. This feature, known as "split horizontal scrolling", allows you to leave one or more columns fixed in one half of the grid, while being able to scroll through the rest of the columns in the other half of the grid. It works much like Freeze Panes in Microsoft Excel.

To use this feature, position the mouse pointer over the small vertical black bar at the left end of the horizontal scroll bar.
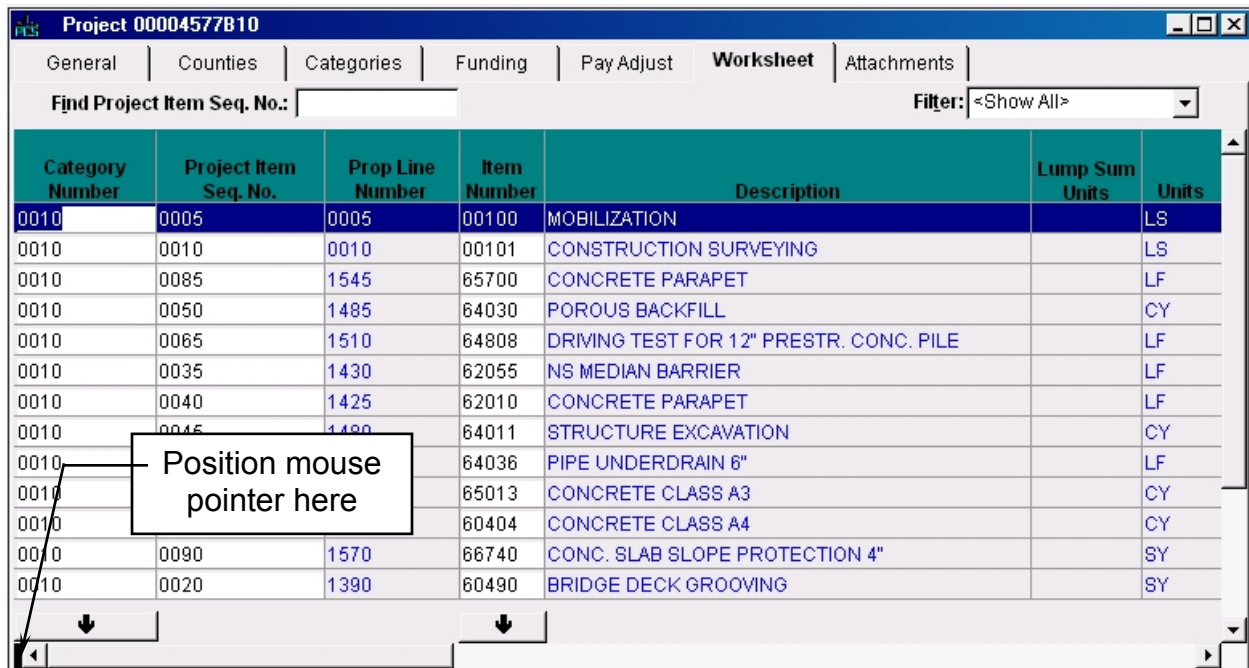
The mouse pointer changes to a double-headed arrow. Press and hold the left mouse button and drag the mouse to the right to create a new horizontal scrolling border. When you release the mouse button, you will have two independently scrolling regions in the grid.

| Category Number	Project Item Seq. No.	Prop Line Number	Item Number	Descript	Estimated Unit Price	Extended Amount	NS De Spec Req
0010	0005	0005	00100	MOBILIZATION	25,072.11000	25,072.110	[
0010	0010	0010	00101	CONSTRUCTION SURVEYIN(	1,500.00000	1,500.000	[
0010	0085	1545	65700	CONCRETE PARAPET	47.94000	1,150.560	[
0010	0050	1485	64030	POROUS BACKFILL	36.28000	2,938.680	[
0010	0065	1510	64808	DRIVING TEST FOR 12" PRES	38.67000	4,447.050	[
0010	0035	1430	62055	NS MEDIAN BARRIER	65.00000	7,540.000	[
0010	0040	1425	62010	CONCRETE PARAPET	47.94000	5,656.920	[
0010	0045	1480	64011	STRUCTURE EXCAVATION	28.46000	3,585.960	[
0010	0055	1490	64036	PIPE UNDERDRAIN 6"	7.70000	1,093.400	[
0010	0070	1525	65013	CONCRETE CLASS A3	300.00000	45,300.000	[
0010	0015	1385	60404	CONCRETE CLASS A4	448.09000	94,995.080	[
0010	0090	1570	66740	CONC. SLAB SLOPE PROTE(	36.67000	14,264.630	[
0010	0020	1390	60490	BRIDGE DECK GROOVING	3.00000	1,833.000	[
						512,195.390	

Two Independently scrolling regions

8.2 Adding a Category Item

To add items to the category, first locate the project in the Project List.

Right-click on the project and select **Tabbed Folder Change**. Trns·port displays the tabbed folder.

Click on the Worksheet tab. If no items exist yet for the category, the worksheet window will be blank.
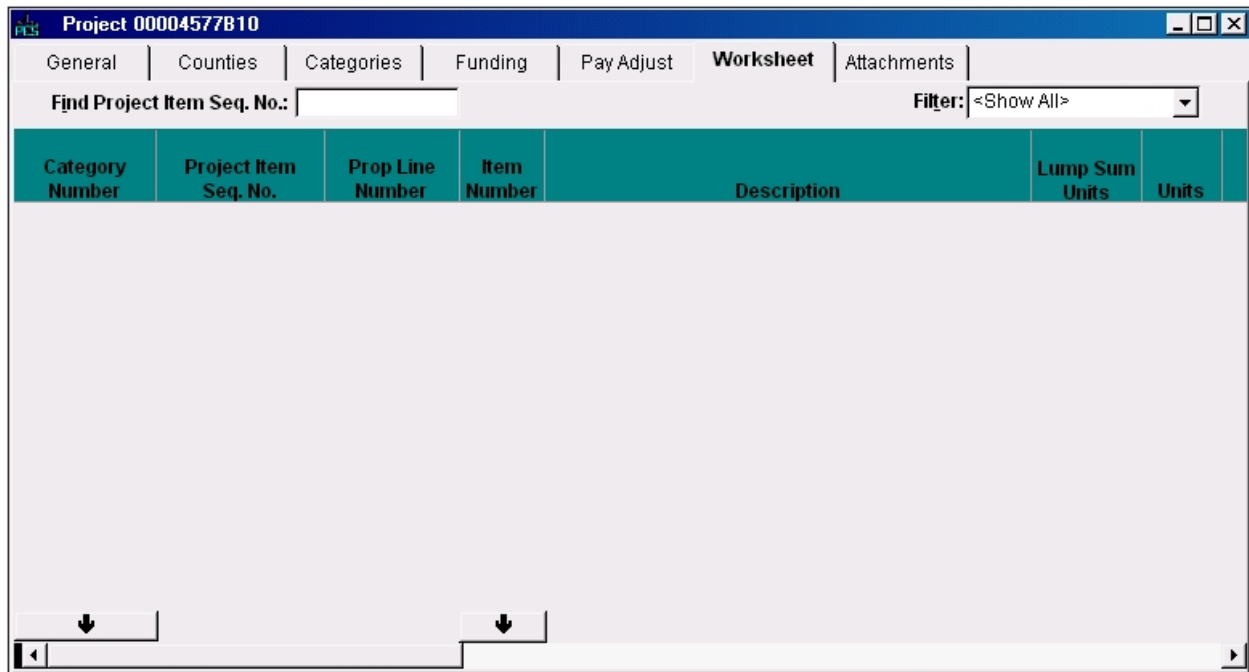
Right-click inside the window and select **Add**. A new row will open ready for data to be entered.

The required fields are:

> Category No.
> Item Number
> Description (Non-std) – if non-standard item
> Spec Book # Non-std – if non-standard item
> Estimate Quantity
> Proj. Item Seq. No.

Category Number: Enter the 4-digit category number for the item. All items for all categories will be entered on the worksheet; therefore, each item must be identified to the proper category. You may either enter the number or select the category from the drop-down arrow at the bottom of the column.

Project Item Sequence Number: This field may be left blank until all items are entered during your work session. The numbers may then be assigned all at once by using the **Assign Line Numbers** process under the **Edit** menu. See **8.2.2 Assigning Item Line Numbers**.

Proposal Line Number: This field is filled in by Trns·port after generating line numbers in the proposal.

Item Number: Enter the 5-digit number for the item. The number may be entered manually or may be chosen from the drop-down arrow at the bottom of the column. Once the Item Code Table has been accessed, you can use the filter and

the advanced filter to search in the table for the desired item. (See **2.8 Working with Filters (Searching)** for help in searching for the items.)

Standard Items: On the following page is an example of an advanced filter search for UNDERDRAIN in the Drainage Items area (items 00500 – 09999).

After filling in the three conditions, click on the APPLY button. (When asked if you wish to save the filter, you may choose not to unless this is a search you perform frequently.) The results of the search will be presented.

Non-standard items: Before using a non-standard item, be certain that there is not a standard item that is applicable. Once you determine that there is not an applicable standard item, you will need to select one of the items in the table that is prefixed with NS. These items are interspersed throughout the table in places where deemed appropriate. Additionally, there are very general NS items at the end of many of the groupings; select from these very general NS items only as a last resort.

EXAMPLE: You need to enter an item "Crosshole Sonic Logging" in the area of Bridge Substructure (Items 64000 – 66999). You first search for it to see if you can find it as a standard item. If you cannot find it, the next attempt would be to search for an appropriate NS item that applies. See the search created for this:

After looking through the results of the search and still not finding an NS item that would apply to Crosshole Sonic Logging, you will notice that at the end of the search is a very general grouping of NS items:

From this area, you may select the item with the appropriate Item Unit (CY, LF, etc.) and enter the specific wording for the item at the **Description (Non-std)** field.

Note: The same NS item number may be used more than once in an estimate as long as the description you give at the **Description (Non-Std)** field is unique.

Description: This field is automatically filled in when the item number is entered.

Lump Sum Units: **Units**: These fields are automatically filled in when the item number is entered.

Estimated Quantity: Enter the quantity of the item. **Please Note: Enter the quantity of the item to the nearest 10th of the quantity on the plan, for example 2.5. Quantities entered in transport need to match what's shown on the summary that the estimate is built from.**

Estimate Unit Price: Leave this field blank for standard items. When you have finished your estimate, the prices will be generated when you run the Generated Bid-Based Prices process. The designer has the option to overwrite the generated price. **Fill in this field for non-standard items.**

Extended Amount: When the quantity and estimated price are filled in, the extension of those two numbers is shown in this field.

NS Description and Spec Book # Required: This box will automatically check when you enter a Non-standard item number as a reminder that you are required to fill in **Description Non-Std** and **Spec Book # Non-Std** fields. Those two fields will become required.

Description (Non-Std): This field is to be used only for non-standard items, and is a required field if a non-standard item number was entered. Enter the wording needed to complete the non-standard item description. This supplemental

description will be linked to the end of the item description chosen from the Item Lookup Table. (For example, if your non-standard pay item is Parapet Modified, at the **Item Number** field, choose "NS Parapet" from the lookup table, and at this field, enter **Modified**.

IMPORTANT: There will be occasions when you will be entering NS items for multiple projects that will be advertised on the same contract. Consideration must be given to the non-standard descriptions as to whether or not you wish the items to be combined.

- o If you do not wish items to combine, be sure to give unique descriptions in this field.
- o If you wish items to combine, the descriptions given in this field must be <u>exactly</u> the same. In addition, any other information you enter on the item screen must be <u>exactly</u> the same (spec book#, source of price, etc.).

Note: The "NS" will print on the estimate, but will not print on the proposal.

Spec Book # Non-Std: This is a required field if a non-standard item number was entered. Enter the Specification Number here, if known. Up to three Specification Numbers, or 11 characters, may be entered. You may also enter "ATTD" to indicate Special Provisions are attached or "PLAN" to indicate pertinent information is on the plans.

Non-Bid Item: Defaults to N. For State Forces, Railroads and Utility Items (such as Verizon relocation, VA Power Relocation), change to Y. These items will also require a separate category numbered between 2000 and 2999.

Source of Price: Defaults to GBBA. For Non-Standard and Standard items priced by the user, enter E.

Estimated Price Lock: Defaults to N. For Non-Standard items and Standard items priced by the user, enter Y to ensure that Trns·port will not price the item.

Revised Price: <u>This field is reserved for </u>Scheduling & Contract<u> Division</u>. Changes from the estimated price can be tracked by utilizing this field.

Combine w/Like Items: Defaults to Y to combine like items on the proposal; change to N if you do not want to combine items on the proposal.

When you have finished entering an item and are ready to enter another, right-click in the window and select **Add**. A new row will be opened at the bottom. Continue until you have entered all items.

8.2.1 Entering Mobilization and Construction Surveying

Two items shall be entered on every L&D and S&B estimate:

> 00100 – Mobilization
>
> 00101 – Construction Surveying

The items may be entered, with a quantity of 1, at the time the rest of the items are entered. As these two items are to be priced by the designer, be sure to enter an **E** at **Source of Price** and a **Y** at **Estimated Price Lock** field. Failure to change the **Estimated Price Lock** field will allow a price to be generated by Trns·port - a price which is only an average of bid history prices, not the price based on the formula for which VDOT figures Mobilization and Construction Surveying.

After the estimate has been renumbered and bid-based prices have been generated, the costs for these two items may be calculated and entered. (Bridge users may enter cost for Construction Surveying at this time as it is generally $1500 per span.)

Refer to **9.6 Construction Surveying, Mobilization, Construction Engineering** for detailed instructions and formulas for these items.

### 8.2.2 Assigning Item Line Numbers

You will not be able to permanently save the Worksheet until line numbers have been assigned to all the items in a project. Line numbers can be automatically generated by Trns·port. While in the Worksheet tab, select **Assign Line Numbers** from the **Edit** menu and choose **Project Items** from the submenu. Trns·port assigns line numbers using ten-digit increments.

Note: This is not to be confused with Renumbering Project Estimate Items. The **Assign Line Numbers** process merely gives a number to each item; the items may still be out of sequence until the Renumbering Project Estimate Items process is run. See **9.1 Renumbering the Items** for instructions.

After the line numbers have been assigned, click on the SAVE icon 🖫 to save your work to the database.

- o If you have completed all required field criteria satisfactorily, your items will be added.

    When the following screen displays, click on the YES button:
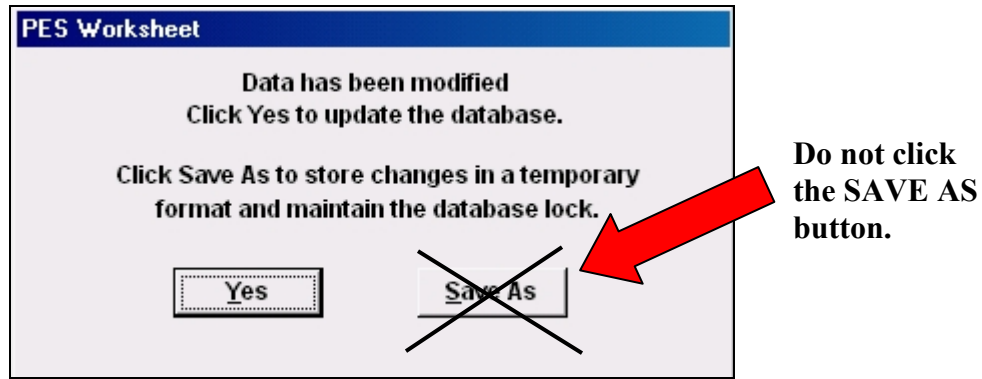
It is **not** recommended that you click the SAVE AS button as the system may become unstable resulting in loss of data or locked projects.

o If a required field was not filled-in or incorrect data entered at a field which is supported with a reference table, a warning window will display with information. For example, if you left a required field blank or entered invalid data, you will see an **Project Tabbed Folder - Errors** window giving information as to what field was left blank or contains an invalid value:
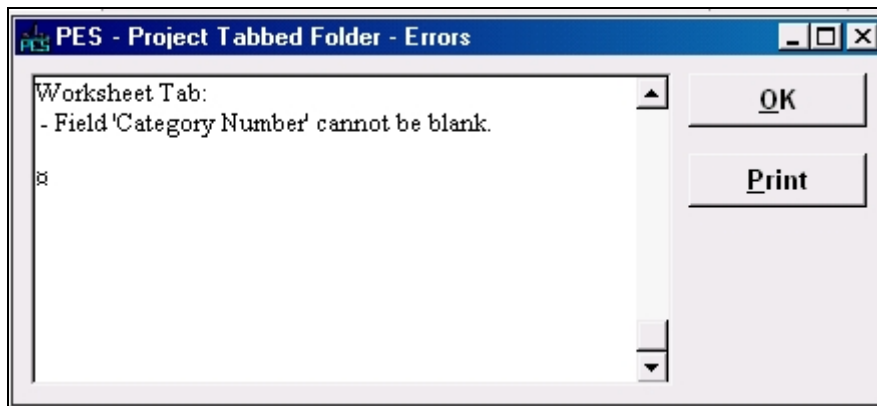
8.3   Changing an Item

Click on the Project List icon to display the existing list of projects.

On the project for which you wish to make changes to items, right-click and select **Tabbed Folder Change.**   Trns·port displays the tabbed folder. Click on the Worksheet tab.

Make changes to any existing item.   Click on the SAVE icon to save your work to the database.

You may need to re-calculate your Mobilization and Construction Surveying costs due to changes in your totals. Refer to **9.6.1. Construction Surveying** and **9.6.2 Mobilization**.

8.4   Deleting an Item

Click on the Project List icon [icon] to display the existing list of projects.

On the project for which you wish to delete an item, right-click and select **Tabbed Folder Change.**   Trns·port displays the tabbed folder. Click on the Worksheet tab.

Right-click on the item you wish to delete and select **Delete**. At the **Delete Rows** window which displays, click on the YES button. Click on the SAVE icon [icon] to save your work to the database.

You may need to re-calculate your Mobilization and Construction Surveying costs due to changes in your totals. Refer to **9.6.1. Construction Surveying** and **9.6.2 Mobilization**.

8.5   Combining Projects

You can have a co-worker assist you in entering your items. The co-worker could enter half the items for the project in a "dummy" project and then you could combine the items from that project into your project. Both projects must have the same Item Code Table and Unit System.

When you are ready to import the co-worker's items into your project, start at the Project Listing. Click on the Project List icon [icon] to display the existing list of projects.
Right-click on your project and select **Tabbed Folder Change**. Click on the Worksheet tab.

From the **File** menu, select **Import**. Choose **Combine Projects** from the submenu. Trns·port displays a list of all projects. Select the "dummy" project to which your co-worker has been assigning items. Trns·port loads all the item information to your worksheet.

Before you can save the new items to the project, you must assign line numbers. Refer to **8.2.2 Assigning Item Line Numbers**. Click on the SAVE icon [icon] to save your work to the database.