



Quick Reference Guide (QRG) Summary of Changes

Creation Date: 01-20-2026

Revised Date:

Revised By:

Changes Made:

Categories and Items Summary Page

Step 1: From the *Project Category & Item Summary* screen, click the **Categories Tab**.

Project Category and Item Summary

▼ Project: 123456789 - test

General

Categories

Category Alternate Sets

Items

Step 2: Click the **New** button.

🔍 Type search criteria or press Enter

Advanced

Showing 1 of 1

New

Step 3: Now with the Category Row showing, enter the required information in the required fields. The required fields consist of: **Cat ID** (Category ID), **Descr** (Description) and the **Federal Improvement Code**.

Cat ID *	Descr *	EC Pct	Federal Improvement Code *
2	TEST		F001
			Roadway - New construction

Step 4: Once the fields are all filled out, click the **Save** button.

Save

▼

?

Step 5: Still on the **Categories Tab**, click the **Category Alternate Sets Tab** on the left side panel.

Project Category and Item Summary

▼ Project: 123456789 - test

General

Categories

Category Alternate Sets

Items

Step 6: In the **Cat Alt Set ID field**, enter the ID.

> Cat Alt Set ID * ▼

1

Step 7: In the **Description field**, enter a description.

> Cat Alt Set ID * ▼

1

Description * ▼

Test

Step 8: If you want to use the **Life Cycle Cost**, set the Life Cycle Cost Indicator by checking the checkbox.

> Cat Alt Set ID * ▼

1

Description * ▼

Test

Life Cycle Cost Indicator ▼

☒

Step 9: Click the **Save** button.

Save ▼ ?

Step 10: Select the **Items Tab** on the left side panel.

Project Category and Item Summary

▼ Project: 123456789 - test

General

Categories

Category Alternate Sets

Items

Step 11: Click the **New** button.

Project Category and Item Summary

▼ Project: 123456789 - test

General

Categories

Category Alternate Sets

Items

🔍 Type search criteria

New ▼

No rows found matching criteria

Step 12: In the **Item ID field** enter the Item ID.

▼ 104 3120- CONSTRUCTION MISCELLANEOUS

Item ID* ▼

🔍 104 3120

CONSTRUCTION MISCELLANEOUS

Step 13: In the **Project Item Supp Description field**, enter a description.

▼ 104 3120- CONSTRUCTION MISCELLANEOUS TON

Item ID* ▼

🔍 104 3120

CONSTRUCTION MISCELLANEOUS

Project Item Supp Description* ▼

Test

Step 14: You may enter any other needed/desired information in the other fields if applicable.

Item ID ▼	Category ID ▼
104 3120 CONSTRUCTION MISCELLANEOUS	
Project Item Supp Description ▼	Project Item Previous Price ▼
Test	
Project Item Line Number	Non-Bid
	No
Unit of Measure	Estimation Type ▼
TON	
Quantity ▼	Major Item
	No
Project Item Unit Price ▼	Proposal Item Line Number ▼
Extended Amount	Pricing Comments ▼

Step 15: Click the **Save** button.



NOTE: You may edit any existing Items.