New Company to get access to Doc Express

ONE person in the company, go to www.docexpress.com
Register
Alert Janet or Jen if you are the prime so they can give you access to a contract(s)

New user to Doc Express but company already has access
Do NOT go to www.docexpress.com and register
Have another person in your company invite you to join
Register after receiving their invitation e-mail
Once registered you will automatically have the same access as other users in your company

Change Account Information
Go to My Account screen
Change personal information only

See other users in your organization
Go to My Account screen
Scroll down and all users will be listed along with their status

On-Line Help
Click on Help in the lower right corner of the screen
Options are available for the contract screen and the drawer screens

Chat
There is a Chat option beside the On Line help at the bottom of the screen
Click on Chat and then Start Conversation
Enter your name and your organization then your remarks
When finished, click on the 3 lines in the upper left of this section and then End Chat

View contracts
Go to Doc Express screen
All contracts to which you have access are displayed
You have a choice of line or grid view by selecting that icon located to the far right of the word Contracts
11 Tag field
   Go to Doc Express screen
   Click on Actions > Manage Tags
   This is a field where you can enter a job number or something that makes sense to you to describe the contract. DOT users cannot see this field
   Enter your choice – more than 1 user in a company can enter a tag for the same contract and all will be displayed
   Save

12 Mark a contract as a Favorite
   Go to Doc Express screen
   Click the banner to the far right of the contract ID beside the contract of your choice
   The banner will turn yellow
   The contract will move to the top of your list of contracts

12 To remove a contract from being a Favorite
   Go to Doc Express screen
   Click the banner to the far right of the contract ID beside the contract of your choice
   The banner will turn lose the yellow color
   The contract will return to its normal order in the list of contracts

13 Badges - the number of submittals in a drawer that have had no action taken since they were submitted
   Go to Doc Express screen
   The number inside the badge beside each drawer indicates the number of submittals made to that drawer that have had no action taken since the initial submittal
   If no badge beside the drawer, either all documents have been transitioned at least once or there are no documents in the drawer

13 Search for a contract
   Go to Doc Express screen
   The search field is always seen – enter contract info of your choice
   Can do an advanced search for prime contractors, letting dates, admin office, etc.

13 Filter options
   The filter options change depending on whether you’re in the list of contracts or in a drawer
   Go to Doc Express screen
   Click on the 3 horizontal lines in the middle of the screen under the Search field
Can use 1 or multiple filters at the same time
If you filter on different types one right after the other, be sure to
allow the list of submittals to refresh before selecting the next type
to filter on in case you have a slow connection.
To close the filter, click on the “X” in the middle of the screen

13 Viewing Locked Contracts
   Go to Doc Express screen
   At the list of contracts, open the filter (click on the 3 horizontal lines in
   middle of the screen)
   Change the filter from All Contracts to Locked Contracts
   To see active contracts again, change the filter back to All Contracts

14 Enable Downloads - allow other subs/suppliers to view your submittals
   Go to Doc Express screen
   Open a contract
   Click on Actions > Manage Access
   Put a checkmark in Enable Downloads for whatever subs and/or suppliers
   you wish to allow to open the documents you submit in those
   specific drawers.
   No checkmark means that sub/supplier can see your
document in the list
of submittals but can’t open the document itself

15 Notifications
   Go to Doc Express screen
   Click on Preferences > Notifications
   **Progressed Document** option
      These are real time notifications
      Can select to be notified on a drawer by drawer &/or document by
document basis
   **Completed Document** option
      These area real time notifications
      Can select to be notified on a drawer by drawer &/or document by
document basis
   **Rejected Document** option
      This is a real time notification
      Can select to be notified on a drawer by drawer &/or document by
document basis
   My suggestion for real time e-mails, especially for the prime contractor –
   Progressed – checkmark in All documents I have access to
      Select the Contract Signing and the Contract Modification in the
      any drawers field
   Completed – checkmark in All documents I have access to
      Select the Contract Signing drawer in the any drawers field
   Rejected – checkmark in All documents I have access to
Document Submission Reports

These are sent daily.
Every submittal by contract and drawer that took place the preceding day are displayed.
One report shows submittals from the previous day for every contract to which you have access.
One report shows only those contracts’ submittals marked as your Favorite.
The other shows documents with due dates within a time period of your choice.

To See Workflow for a Drawer

Open the drawer.
Click Actions > Details.

Documents

Click on the Documents button.
To see all documents submitted to all drawers in all contracts.
Have the option to filter several ways including by contract and document types.

Dashboard

Go to Doc Express screen.
Informational only.
Lists documents ready to be transitioned by contract and/or drawer.
Lists all documents that are past due.
   IF there was a due date entered by a DOT user previously.
Lists all contracts due soon – select time period in months or days.
   We use the late start date in this field so users can tell at a glance if their contract should be starting or is past the late start date.
Lists documents that have been idle in a contract or drawer for a given time period.

Submitting Multiple Documents at the Same Time

At the submit screen click on “Want to Upload Multiple Documents?” sentence at the top of the page.
Click in the arrow above Drag and Drop
Select the documents to upload.
Choose the type and sign if required then Save.
(The title of the document in Doc Express is the same file name of the document submitted.)

Initial Submittal Screens
Informational only

20 Viewing Submitted Documents
- Top line is the title and just to the right is the type it’s linked to
- Next line displays the organization who submitted the document
- The number of comments and supporting documents are indicated just below the title
- Next is the date and time of the submittal along with the submitter’s company and name
- To the far right is the status of the document
- Below the status is the log
- For documents with a status of Submitted, there is no log yet

21 Revert Transition Option
- To “un-do” a transition you made, click Actions > Revert Transition
- Cannot revert if there is a comment or a supporting document
- Only available if you are the last one to transition the document
- Can have multiple users revert to get it back to the Submitted status
- Cannot revert document back to Submitted status and then Remove it if there is a comment or supporting document

21 Due Dates (we do not use this much)
- Must be entered by a DOT user (is optional)
- If a submittal is overdue, will be noted under the title of the document
- These overdue documents, if any, are displayed in the Dashboard

21 Submitting to the **Contract Documents** drawer
- Go to Doc Express screen
- Open the Contract Documents drawer by clicking on it
- Click Submit
- Enter a title – suggested naming conventions for some documents in each drawer are in Appendix A of the user guide. If using a number, use 2 digits, if using a date, use 6 digits (eg 06/24/18) **Main thing – be consistent!!**
- Select the appropriate type
- In the Attachment field, browse to the location of the submittal
- Add Supporting Documentation if desired
- Enter a Comment if desired
  - (Remember if you enter either, you can no longer remove the document yourself)
- Save

If a submittal is rejected, correct it and resubmit it so it “replaces” the original submittal. Do NOT submit the corrected document as though it were new.

25 Submitting to the **Pay Items** drawer
Go to Doc Express screen
Open the Pay Items drawer by clicking on it
Click Submit
Enter a title – suggested naming conventions for some documents in each drawer are in Appendix A of the user guide. If using a number, use 2 digits, if using a date, use 6 digits (e.g. 06/24/18) **Main thing – be consistent!!**
Select the appropriate type
In the Attachment field, browse to the location of the submittal
Add Supporting Documentation if desired
Enter a Comment if desired
( Remember if you enter either, you can no longer remove the document yourself)
Sign by putting a checkmark in front of the signature statement
Save

If a submittal is rejected, correct it and resubmit it so it “replaces” the original submittal. Do NOT submit the corrected document as though it were new.

29  **Signing a Contract Modification**
Go to Doc Express screen
Open the Contract Modification drawer by clicking on it
Find cont mods with a status of Submitted
Click on the title to view the cont mod before signing
Click on the word Transition
Select the Reviewed by Contractor status to give your “approval’
Enter a Comment if desired
( Remember if you enter one, you can no longer remove the document yourself)
Click Save
Sign your name & also put a checkmark in front of the signature statement
Click Save

33  **Submitting to the Payrolls drawer**
**ONLY THE PRIME CONTRACTOR IS TO SUBMIT TO THIS DRAWER**
After you have already checked the payrolls received from the subcontractor(s) and signed them as usual
Go to Doc Express screen
Open the Payrolls drawer by clicking on it
Click Submit
Enter a title – PR followed by report number followed by week ending date (e.g. PR 01 w/e 06/25/18) is the suggested naming convention
Select the appropriate type – there is a type for each contractor associated to the contract
In the Attachment field, browse to the location of the payroll
Add Supporting Documentation if desired
Enter a Comment if desired
(Remember if you enter either, you can no longer remove the
document yourself)

Save

If the Payrolls drawer doesn’t have a type for a specific contractor
Contact Janet (Office - 641-782-2096 or Cell – 641-344-004) or Jen
(Office - 641-782-4518 or Cell – 641-202-0553) to add them

If a payroll is rejected, correct it and resubmit it so it “replaces” the original
submittal. Do NOT submit a corrected payroll as though it were new.

35 Submitting to the Working drawer
Go to Doc Express screen
Open the Working drawer by clicking on it
Click Submit
Enter a title – suggested naming conventions for some documents
in each drawer are in Appendix A of the user guide. If using
a number, use 2 digits, if using a date, use 6 digits (eg
06/24/18) Main thing – be consistent!!
In the Attachment field, browse to the location of the payroll
Add Supporting Documentation if desired
Enter a Comment if desired
(Remember if you enter either, you can no longer remove the
document yourself)

Save

36 To change and re-submit a document to Working drawer
Go to Doc Express screen
Open the Working drawer by clicking on it
Click title of the document and save it to a location such as your hard drive
Edit the document as desired and save it
Beside the original submittal, click Resubmit document
Browse to the location of the edited submittal
Enter a comment if desired
Save

37 Submitting to the Shop Drawings drawer
Go to Doc Express screen
Open the Shop Drawings drawer by clicking on it
Enter a title for the document using this naming convention-
paren number of the PROJECT (not the contract in case of tied
projects) followed by the county name & design number (if
applicable) followed by a description of the submittal
Select the appropriate type
In the Attachment field, browse to the location of the shop drawing
Add Supporting Documentation if desired
Enter a Comment if desired
(Remember if you enter either, you can no longer remove the
document yourself)
Save

39 Re-submitting a shop drawing
Go to Doc Express screen
Open the Shop Drawings drawer by clicking on it
Find the document to be edited and re-submitted as per the status
If there is a marked up copy, double click on that submittal to view it
Make the corrections noted and save it
Click Resubmit
Attach your edited document
Enter a comment if desired
Save

40 Submitting to the **Signature** drawer
Go to Doc Express screen
Open the Signature drawer by clicking on it
Enter a title – suggested naming conventions for some documents
in each drawer are in Appendix A of the user guide. If using
a number, use 2 digits, if using a date, use 6 digits (eg
06/24/18) **Main thing – be consistent!!**
Select the appropriate type
In the Attachment field, browse to the location of the submittal
Add Supporting Documentation if desired
Enter a Comment if desired
(Remember if you enter either, you can no longer remove the
document yourself)
Sign your name & also put a checkmark in front of the signature statement
Click Save

40 Signing in the Signature drawer
Go to Doc Express screen
Open the Signature drawer by clicking on it
Beside the appropriate submittal with a Submitted status click Transition
Select Signed by Contractor as the status
Enter a comment if desired
Add supporting documentation if desired
(Remember if you enter either, you can no longer remove the
document yourself)
Sign your name & also put a checkmark in front of the signature statement
Click Save
**REMEMBER**- If you didn’t sign it on paper, don’t sign it in Doc Express
42  **Plans** drawer
    Only DOT users submit to this drawer
    The As Advertised set of plans will be submitted at the latest by the RCE
    within 2 weeks of the letting

43  **Contract Signing** drawer
    ONLY the prime contractor has access to this drawer
    All contract documents are submitted here by the Office of Contracts
    rather than being mailed to the contractor
    Prior to signing the contract, the performance bond must be verified
    A digital signature is NOT required to verify the performance bond
    A digital ID is required to sign the contract
      The first time you open this drawer, a wizard will take you through
      the process of obtaining the digital ID
    If you don’t need/want a digital ID, ignore the wizard

**GENERAL INFO FOR ALL DRAWERS -**

To view the log for a document –
    Go to Doc Express screen
    Open any drawer by clicking on it
    Click on the down arrow to the far right of any submittal
    The log for that specific submittal will be displayed

The Help feature –
    Is in the lower right of the screen
    Depending on what screen is active will determine the options listed when
    clicking on Help
    For local help, contact Janet Wasteney – janet.wasteney@iowadot.us (Office –
    641-782-2096, Cell – 641-344-0044) or Jen Strunk –
    jennifer.strunk@iowadot.us (Office 641-782-4518, Cell – 341-202-0553)

To see the signature history (Contract Modifications, Contract Signing, & Signature
    drawers only)
    Go to Doc Express screen
    Open any of the 3 drawers mentioned
    Select any submittal that has a status other than Submitted
    Click on the title of the document
    Choose to Open the document
    Scroll to the last page that is now attached to the document
    Contract Modifications –
      Signatures must be obtained in a specific order starting with the
      prime contractor
      The last to sign is to mark it Completed
    Contract Signing –
Contractors must first verify the performance bond and then sign followed by the Office of Contracts who then transitions it to Completed status.

Signatures –
There is no certain order required for signatures
Different forms require different signatures

To Remove a submittal
If you submitted and no other activity has occurred even by you, (no comment, supporting documents, etc) you can delete it by clicking on Remove to the far right of the submittals.
Only the submitter has the right to remove a document they submitted.

To Have a Document Hidden or Removed
If a document is wrong but you can’t remove it –
1. it can be archived by either Janet or Jen. This will not delete the document but will “hide” it where it can be seen by opening the filter area of the drawer and change the “Hide Archived” to “Show Archived”
2. It can be removed entirely from Doc Express by Janet or Jen

Revert a Transition
If you need an “un-do” for a transition you made, click Actions > Revert Transition
The option is available only if you are the last one to transition the document
Can revert multiple times to get it back to the Submitted status
BUT cannot revert document back to Submitted status and then Remove it if it has a comment or a supporting document

To Mark Up a Document –
Available only in certain drawers
REPLACES the document being marked up – it does NOT create a new version
No log so no history of documents prior to the mark up
Open the document
Click Edit
Select the markup tool from the markup toolbar on the left.
When finished, click Save

47 IF YOU ARE THE PRIME CONTRACTOR
Giving access to subs and suppliers –
Go to Doc Express screen
Open the contract
Click on Actions > Manage Access
Click on Add Organizations

Contractor/Supplier (September, 2021) - 10
Enter the sub’s or supplier’s name or partial name and click on it when displayed

**Do NOT go through and individually select all users in a company when giving access – just click on the company name.**

Click Next
For access to all drawers, click in the all access “box” then click on their name
For access to only certain drawers, click only on the contractor’s name then at the Manage Access screen, put a checkmark in only the drawers to which you want them to have access
Click Update

To change access for a sub or supplier
Go to Doc Express screen
Open the contract
Click on Actions > Manage Access
Beside the appropriate name, add or remove access to drawers
Click Update

To remove complete access to a contract for a sub or supplier
Go to Doc Express screen
Open the contract
Click on Actions > Manage Access
Click on the red “x” to the far right of the contractor’s name

50 Suggested Naming Conventions and the reasons why for some documents in each drawer
52 The types found in each drawer
57 Materials Documentation Clarification