



# Appia/Doc Express

# Office of Local Systems

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Tammi Bell  
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Office hours Monday – Thursday  
6AM-4:30PM

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# Appia

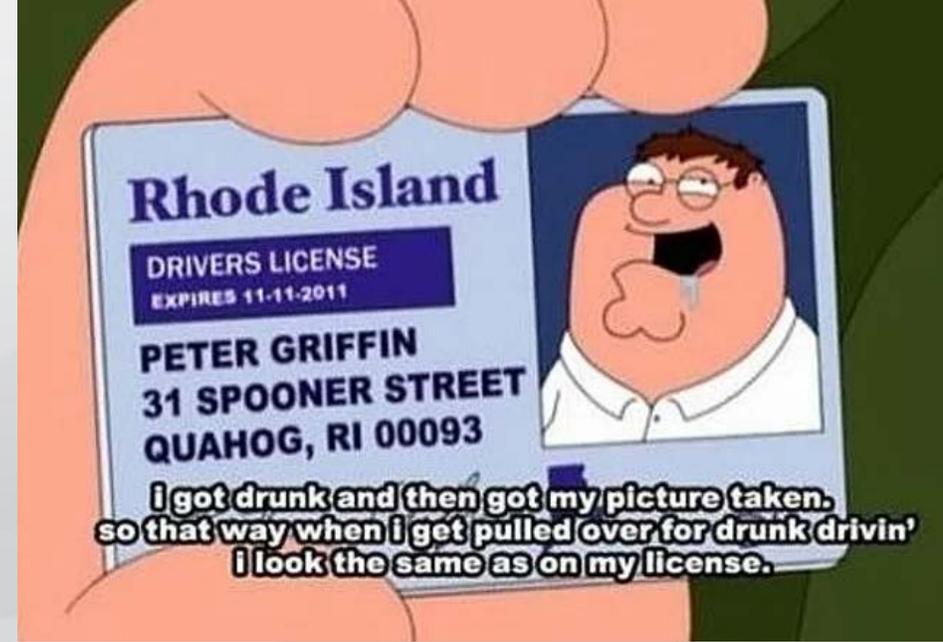


## What is Appia?

- Electronic, web-based, field documentation software for item quantity tracking, pay estimates, Change Orders, and other final documents, etc....
- Simlilar to FieldBook/Field Manager

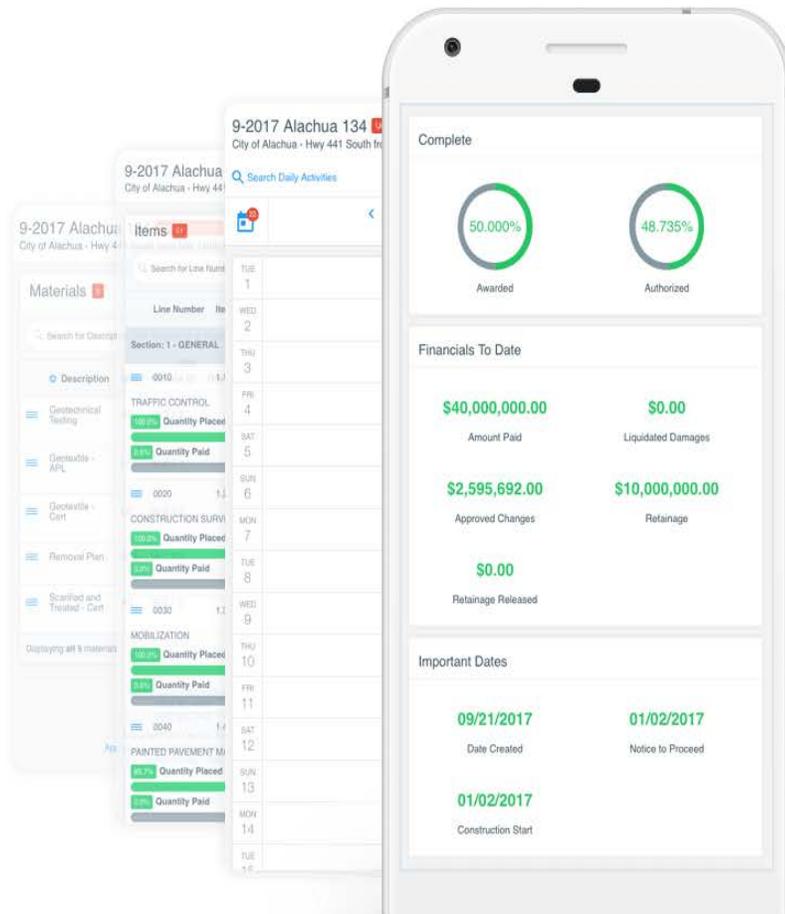


# Licensing



- Cities, Counties, Conservation Boards
- Don't get their own Appia product
- Contact Local Systems
- Consultants
  - Buy their own License
  - Can't use LPAs

# Mobile

[ABOUT](#)[FEATURES](#)[PROJECTS](#)[PRICING](#)[REQUEST A DEMO](#)[Login](#)

## MOBILE

Never miss a thing. Get real-time project access **anytime, anywhere** - even **offline**.

The Appia service was built with mobile in mind. You can continue to collaborate in real-time from your job site without losing access to Appia's construction administration and inspection tools.

 Offline access

 Speech to text

 Photo capture



# Instructions

User Guide [https://iowadot.gov/local\\_systems/Project-Inspection-and-Administration](https://iowadot.gov/local_systems/Project-Inspection-and-Administration)

- Set up
- Creating reports
  - Documents
- Approvals
- Payments
- Funding Overview Guide
- Inspectors Flash Guide

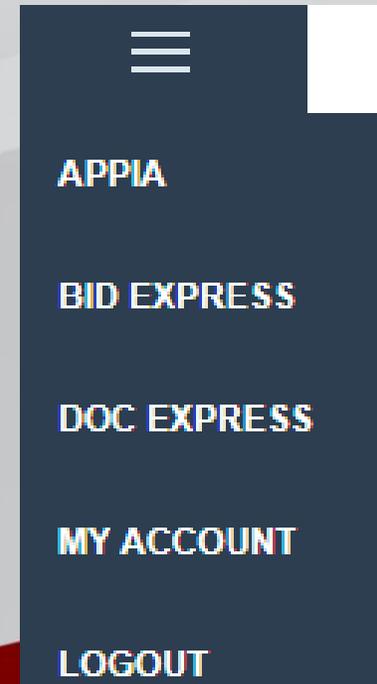
# Information in Doc Express

## After creating Reports

Can place the document in Doc Express

Can add links that will go directly to the documents in the drawer.

## Easy Toggle



# Bids

- Import a Bid
- Delete Bids
- Tabulations
- Analyze

## Analyze

- Project Percent Deviation
- Item Percent Deviation

# EC multicontractor bid New

ITEMS **BIDS** TABULATIONS ANALYZE

## Bids 4

Import

Only bids set to YES will be analyzed, tabulated, or exported.

### 1 PETERSON CONTRACTORS INC.

**\$4,065,432.61** | Low Bid

Bid Total

Will bid be analyzed or exported?  YES

Award

### 2 UNITED CONTRACTORS INC. AND SUBSIDIARIES

**\$4,785,715.84** | 17.717%

Bid Total | Over Low Bid

Will bid be analyzed or exported?  YES

Award

### 3 CRAMER AND ASSOC., INC.

**\$5,655,121.15** | 39.103%

Bid Total | Over Low Bid

Will bid be analyzed or exported?  YES

Award

### 4 GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.

**\$6,123,707.62** | 50.629%

Bid Total | Over Low Bid

Will bid be analyzed or exported?  YES

Award

EC multicontractor bid New

Reports ▾

ITEMS BIDS TABULATIONS ANALYZE

### Bid Summary

<b>1</b> PETERSON CONTRACTORS INC.	\$4,065,432.61	Will bid be analyzed or exported?	<input checked="" type="checkbox"/>
<b>2</b> UNITED CONTRACTORS INC. AND SUBSIDIARIES	\$4,785,715.84	Will bid be analyzed or exported?	<input checked="" type="checkbox"/>
<b>3</b> CRAMER AND ASSOC., INC.	\$5,655,121.15	Will bid be analyzed or exported?	<input checked="" type="checkbox"/>
<b>4</b> GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.	\$6,123,707.62	Will bid be analyzed or exported?	<input checked="" type="checkbox"/>

### Bid Tabulations

Export

Line Number	Item ID	Unit	Quantity	<b>1</b> PETERSON CONTRACTORS INC.		<b>2</b> UNITED CONTRACTORS INC. AND SUBSIDIARIES		<b>3</b> CRAMER AND ASSOC., INC.		<b>4</b> GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.	
				Unit Price	Extension	Unit Price	Extension	Unit Price	Extension	Unit Price	Extension
<b>Section: 0001 - ITEM FOR A 690'-0 X 40'-6 PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE</b>											
0010	2101-0850001	ACRE	5.400	\$3,000.000	\$16,200.00	\$3,000.000	\$16,200.00	\$3,000.000	\$16,200.00	\$3,000.000	\$16,200.00
CLEAR+GRUBB											
0020	2102-2625001	CY	46,716.000	\$7.250	\$338,691.00	\$7.400	\$345,698.40	\$7.400	\$345,698.40	\$7.400	\$345,698.40
EMBANKMENT-IN-PLACE, CONTRACTOR FURNISH											
0030	2102-2710070	CY	4,433.000	\$2.500	\$11,082.50	\$2.500	\$11,082.50	\$2.500	\$11,082.50	\$2.500	\$11,082.50
EXCAVATION CL 10 PDWX+BORROW											

		PETERSON CONTRACTORS INC.	\$17.500	550.000	TON	\$9,625.00		
		UNITED CONTRACTORS INC. AND SUBSIDIARIES	\$17.500	550.000	TON	\$9,625.00	\$0.00	
		CRAMER AND ASSOC., INC.	\$17.500	550.000	TON	\$9,625.00	\$0.00	
		GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.	\$17.500	550.000	TON	\$9,625.00	\$0.00	
0160	2213-8201070	BASE WIDENING, 7 IN. HOT MIX ASPHALT MIXTURE						
		PETERSON CONTRACTORS INC.	\$39.500	351.300	SY	\$13,876.35		
	0.014%	UNITED CONTRACTORS INC. AND SUBSIDIARIES	\$37.830	351.300	SY	\$13,289.68	-\$586.67	●
	0.014%	CRAMER AND ASSOC., INC.	\$37.830	351.300	SY	\$13,289.68	-\$586.67	●
		GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.	\$39.500	351.300	SY	\$13,876.35	\$0.00	
0170	2214-5145150	PAV'T, SCARIFICATION						
		PETERSON CONTRACTORS INC.	\$6.000	680.000	SY	\$4,080.00		
	0.023%	UNITED CONTRACTORS INC. AND SUBSIDIARIES	\$7.400	680.000	SY	\$5,032.00	\$952.00	●
	0.023%	CRAMER AND ASSOC., INC.	\$7.400	680.000	SY	\$5,032.00	\$952.00	●
	0.109%	GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.	\$12.500	680.000	SY	\$8,500.00	\$4,420.00	●
0180	2301-0690210	BRIDGE APPROACH, TWO LANE						
		PETERSON CONTRACTORS INC.	\$136.000	497.400	SY	\$67,646.40		
	0.416%	UNITED CONTRACTORS INC. AND SUBSIDIARIES	\$170.000	497.400	SY	\$84,558.00	\$16,911.60	●
	0.086%	CRAMER AND ASSOC., INC.	\$129.000	497.400	SY	\$64,164.60	-\$3,481.80	●
	0.600%	GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.	\$185.000	497.400	SY	\$92,019.00	\$24,372.60	●
0190	2303-1031750	HOT MIX ASPHALT STANDARD TRAFFIC, BASE COURSE, 3/4 IN. MIX						
		PETERSON CONTRACTORS INC.	\$59.150	1,531.000	TON	\$90,558.65		
	0.107%	UNITED CONTRACTORS INC. AND SUBSIDIARIES	\$56.320	1,531.000	TON	\$86,225.92	-\$4,332.73	●
	0.107%	CRAMER AND ASSOC., INC.	\$56.320	1,531.000	TON	\$86,225.92	-\$4,332.73	●
		GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.	\$59.150	1,531.000	TON	\$90,558.65	\$0.00	

# Project Set Up

How long to set up loose leaf books?

- 1 day?
- 2 days?
- More?

Appia?

- Less than an hour



# What can be found in Appia

## What can created

- Change Orders
- Daily/Diaries Reports
- Forms
- Items & Materials
- Payments/Vouchers
- Punch List
- Time Limits

## What Documents

- Can create reports for
  - Daily Reports
  - Funding
- Link to ERL, Doc Express, and IM's
- Export Data

# Roles

- **System Administrator**
  - Full (Read and Write access)
    - Set up the main account
    - Set up the project in Appia
  - Gives access to users
- **Senior Project Manager**
  - Add, Change, Enter
  - Set up the project in Appia

# Roles

## Inspector

- Add Daily Reports
- Change Orders
- Remove subcontractors
- Modify and submit
- Add and remove unattached items
- Remove project materials
- Unattached Items
- Time Limits
- Punch Lists
- Contractors

## Reviewer

- Daily reports
- Daily diaries

See all project in the construction phase

Can only mark as reviewed functions

# Roles

## Reviewer/Read Only

Local Systems Field Techs

Local Systems Field Engineers

## (Read Only)

Eric Cowles (Maybe)

Tammi Bell (Maybe)

## Contractor?



# Notification

When access is given

- Notification is sent from the system that you have been added



Dear Tammi Bell,

The following users have been added to Iowa Local Systems \_DEMO ACCOUNT:

! Doing business as Iowa Local Systems. [Switch to another business?](#)



# No Signatures

No Digital ID

No Transition Signatures

Can add signature lines to payments and change orders

**But...**



# Log

## Audit Log

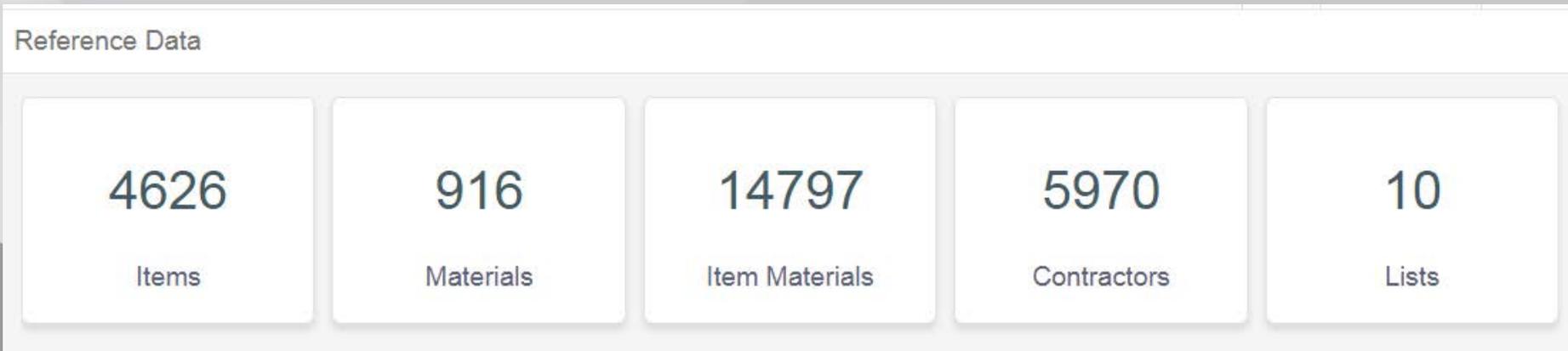
Time	User	Action	Notes
01/15/2019 10:37 AM EST	Tammi Bell	Created	
01/15/2019 10:38 AM EST	Tammi Bell	Submitted For Approval	
01/15/2019 10:38 AM EST	Tammi Bell	Approved	
01/15/2019 10:39 AM EST	Tammi Bell	Paid	

Displaying all 4 actions

# Reference Data

Already within the system at set up

- DOT Bid items
- Materials
- Contractors
- Work types
- Change order types



# Reference Data List

## Materials

- Don't pay for materials without certification
- Warnings for accepting materials in daily postings without materials certs



# BRS-C036(74)---60-36 EC6

Under Construction

Over Plum Creek, S20 T70 R42

[Links](#)

## Overview

[Edit](#)

### General Info

**Created By**

Eric Cowles

**Project Manager**

Eric Cowles

**Managing Office**

Fremont County Engineer

**Prime Contractor**

GUS CONSTRUCTION CO., INC.

**Work Type**

RCB CULVERT RPLC - TWIN BOX

**Location**

J18

**Description**

Over Plum Creek, S20 T70 R42

### Complete



Awarded



Authorized

### Financials To Date

**\$32,615.28**

Amount Paid

**\$0.00**

Liquidated Damages

**\$1,000.00**

Approved Changes

**\$1,008.72**

Retainage

**\$0.00**

Retainage Released

### Important Dates

**02/01/2019**

Date Created

**01/25/2019**

Notice to Proceed

**01/28/2019**

Construction Start

### Project Amounts

**\$639,053.74**

Awarded

**\$640,053.74**

Authorized

# Items

- Post each days activities
- Worksheets

Area: Acre

Preview

CALCULATED RESULT

**0.230**

length \* width / 43560

\* Length (FT)

200.000

\* Width (FT)

50.000

OVERVIEW PERSONNEL EQUIPMENT ITEM POSTINGS ATTACHMENTS

## Item Postings

Save Add Cancel

0010: 2101-0850001 CLEAR+GRUBB **ACRE** Manual

Authorized Quantity

Pending Quantity

Remaining Quantity

Quantity Placed  
Use Worksheet

Total Placed

0.500

0.000

0.020

0.250

0.480

# Materials

Item	Unit	Authorized Quantity	Quantity Placed	Unit Price
0190: 2518-6910000	EACH	2.000	2.000	\$350.000
SAFETY CLOSURE				

Material	Usage Rate	Approved Quantity	Remaining Quantity	Fund Package	Used Quantity
TRAFFIC CONTROL, TYPE 3 BARRICADE	0.000 EACH/EACH	0.000	0.000	Default Fund Package	0.000
TRAFFIC CONTROL, ORANGE SAFETY FENCE	0.000 LF/EACH	0.000	0.000	Default Fund Package	0.000
SIGNING, RETROREFLECTIVE SHEETING	0.000 SY/EACH	0.000	0.000	Default Fund Package	0.000

0280: 2602-0000020	LF	388.000	244.000	\$4.000
SILT FENCE				

Material	Usage Rate	Approved Quantity	Remaining Quantity	Fund Package	Used Quantity
SILT FENCE	0.000 LF/LF	400.000	400.000	Default Fund Package	0.000
FENCE POSTS, STEEL	0.000 EACH/LF	200.000	0.000	Default Fund Package	200.000





# Iowa Local Systems \_DEMO ACCOUNT

## Daily Diary

BRS-C036(74)---60-36 EC6

**Description** Over Plum Creek, S20 T70 R42  
**Report Date** 01/29/2019  
**Project Manager** Eric Cowles  
**Prime Contractor** GUS CONSTRUCTION CO., INC.  
**Created By** Eric Cowles on 03/19/2019 09:41 AM EDT  
**Inspectors** Eric Cowles (Approved)  
**Remarks** Asbestos Done. C&G Done. Silt Fence complete.  
Fencing at safety closure not in place overnight. Instructed contractor to install and put up each night before leaving the site. Non-compliance issued.  
Fencing showed up on site at 2:00  
TC ok.

### Item Postings

Line Number	Item ID	Unit	Unit Price	Quantity Placed	Posted Amount
<b>Section: 1 - ITEMS FOR A TWIN 10'-0 X 10'-0 REINFORCED BOX CULVERT WITH 18'-10 X 10'-0 INLET</b>					
0010	2101-0850001	ACRE	\$12,000.000	0.250	\$3,000.00
CLEAR+GRUBB					
<b>Contractor:</b> GUS CONSTRUCTION CO., INC.					
<b>Posted By:</b> Eric Cowles					
<b>Funding Details</b>					
<b>Default Fund Package</b>				0.250	\$3,000.00



**Time Limit: Late State Date 01/28/19**

Friday 01/25/2019 - Saturday 02/02/2019

<b>Description</b>	Over I
<b>Location</b>	J18
<b>Awarded Project Amount</b>	\$639,0
<b>Authorized Project Amount</b>	\$640,0
<b>Notice to Proceed Date</b>	01/25/
<b>Construction Start Date</b>	01/28/
<b>Prime Contractor</b>	GUS C
<b>Dates Covered</b>	01/25/
<b>Time Complete To Date</b>	4.5 Da
<b>Time Complete In Period</b>	4.5 Da
<b>Total Authorized Days</b>	70.0 D
<b>Total Days Remaining</b>	65.5 D

Date	Day of the Week	Days Charged
01/27/2019	Sunday	0.0
<b>Remarks: No work</b>		
01/28/2019	Monday	1.0
<b>Remarks: Test Day 1</b>		
01/29/2019	Tuesday	1.0
<b>Remarks: Test Day 2</b>		
01/30/2019	Wednesday	0.5
<b>Remarks: Test Day 3. Rain in PM 0.5"</b>		
01/31/2019	Thursday	1.0
<b>Remarks: Test day 4</b>		
02/01/2019	Friday	1.0
<b>Remarks: Test Day 5</b>		
02/02/2019	Saturday	0.0
<b>Remarks: No Work</b>		
<b>Total This Period:</b>		<b>4.5</b>
<b>Total To Date:</b>		<b>4.5</b>

- Calendar
- Complete
- Working



# Iowa Local Systems \_DEMO ACCOUNT

## Detailed Payment

BRS-C036(74)---60-36 EC6

**Description** Over Plum Creek, S20 T70 R42  
**Payment Number** 1  
**Pay Period** 01/25/2019 to 02/02/2019  
**Prime Contractor** GUS CONSTRUCTION CO., INC.  
**Payment Status** Pending  
**Awarded Project Amount** \$639,053.74  
**Authorized Amount** \$640,053.74

Line Number	Item ID	Unit	Unit Price	Authorized Quantity	Current Paid Quantity	Previous Paid Quantity	Total Quantity Paid To Date	Total Quantity Placed To Date	Current Payment Amount	Total Amount Paid To Date
<b>Section: 1 - ITEMS FOR A TWIN 10'-0 X 10'-0 REINFORCED BOX CULVERT WITH 18'-10 X 10'-0 INLET</b>										
0010	2101-0850001	ACRE	\$12,000.000	0.500	0.480	0.000	0.480	0.480	\$5,760.00	\$5,760.00
CLEAR+GRUBB										
0020	2102-0425070	TON	\$50.000	168.000	0.000	0.000	0.000	0.000	\$0.00	\$0.00
SPECIAL BACKFILL										
0030	2102-2710070	CY	\$16.000	6,861.000	0.000	0.000	0.000	0.000	\$0.00	\$0.00
EXCAVATION, CL 10, RDWY+BORROW										
0040	2104-2710020	CY	\$32.000	49.000	0.000	0.000	0.000	0.000	\$0.00	\$0.00

# Payments

- Contractor Pay System
  - Not yet
- 309's
- Reimbursements

# Stockpiled Materials



## Appia will do it

- Tracks as you pay and draws down the amount
- No separate tracking



# Force Account

## Appia will do it

- Set up crews and equipment
- No separate tracking

**Do it  
Now**

# Punch List



## Iowa Local Systems \_DEMO ACCOUNT Punch List

BRS-C036(74)---60-36 EC6

Projects / BRS-C036(74)---60-36 EC6 / Pun

BRS-C036(74)---60-36 EC6  
Over Plum Creek, S20 T70 R42

**Description** Over Plum Creek, S20 T70 R42  
**Location** J18  
**Authorized Project Amount** \$640,053.74  
**Prime Contractor** GUS CONSTRUCTION CO., INC.

### Punch List

Task	Status	Start Date	End Date	Completed By
Grub Stumps	Complete	03/18/2019	03/19/2019	EDC
Remove rubble from bridge demo	Active	03/18/2019		
Replace sidewalk panel at ##### house	Not Started			

**3 tasks**

Punch List 3

#### Description

Grub Stumps

Remove rubble from bridge demo

Replace sidewalk panel at ##### house

Displaying all 3 tasks

support@appia.net

Links

Reports

Add



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# IM 6.000 Attachment D

- References DOT form numbers
- Most likely an update to accept Appia printouts



# Appia

## Trainings Done

- Sioux City, Mason City, Cedar Rapids (2), Atlantic, Fairfield, Ames
- Individual Agency Training Available
  - Contact Eric Cowles

# Implementation



2019:

- Request with Regional Local Systems approval
- Need to have a training session first

2020:

- Full Implementation

# Doc Express

## Trainings Done

- Sioux City, Mason City, Cedar Rapids (2), Atlantic, Fairfield, Ames
- **USE CORRECT NAMING CONVENTIONS!**

# Doc Express

## Digital Signatures

- Still learning
- Still tweaking
- Guides

[https://iowadot.gov/local\\_systems/Project-Inspection-and-Administration](https://iowadot.gov/local_systems/Project-Inspection-and-Administration)

# Doc Express

## Digital Signatures

- Email August 8, 2018
  - Effective October 2018 letting
- 70 last year, 35 this year
- Contact Tammi Bell in Local Systems for set up

[https://iowadot.gov/local\\_systems/Project-Inspection-and-Administration](https://iowadot.gov/local_systems/Project-Inspection-and-Administration)



LOCA

FEDE  
INFO

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FEDE

LOCA  
INFO

MAIL

PROJ  
INFO

PROJ  
ADMI

▶ PUBLICATIONS

▶ STREET FINANCE REPORT  
(SFR)

## Materials

- [Portland Cement Concrete \(PCC\)](#)
- [Hot Mix Asphalt \(HMA\)](#)
- [Quality Assurance Program](#)

## Doc Express

- [Local Public Agencies User's Guide](#)
- [Appendix for Local Public Agencies — Naming Convention](#)
- [Appendix for Local Public Agencies – Digital Contract Signing and Electronic Signing of Performance Bond](#)

## Appia

- [Appia User's Guide](#)
- [Funding Overview Guide](#)
- [Inspector Flash Guide](#)

## CONTRACTOR EVALUATIONS



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Questions?