

Appia

# Project Creation & Account Management Instruction Manual (Pre-Construction Instructions)

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# 1 - Basic Navigation



The menu bar on the left contains the main navigation tabs.

The four-square box is where you can navigate between Appia and Doc Express.

The circle with the initials is where you can navigate to the Account settings screen.

The screenshot shows the Appia software interface. On the left is a dark navigation menu with icons for 'MY PROJECTS', 'REFERENCE DATA', 'SYSTEM MGT', and 'EXPORT DATA'. The top bar includes the Appia logo, a notification banner, and user controls (a four-square box, a bell, a question mark, and a profile circle with initials 'NS'). The main content area is titled 'My Projects' and features a 'Find Project' search bar, 'Create Project' and 'Import Project' buttons, and a 'Status' dropdown menu. Below this is a 'Favorites' table with columns for Project ID, Description, and Project Status. The table lists five projects, all marked as 'Imported' and in 'Construction' status. Each row has a blue dropdown arrow in the status column.

Project ID	Description	Project Status
01-C001-116 (Imported)	WORKDAY TEST_FM-C001(116)--55-01, AcctID- 37895, FM-C001(116)--55-01, AcctID- 37896, Letting date- 17 Aug 2021	Construction
01-C001-121 (Imported)	FM-C001(121)--55-01, Acct ID- 39562, Letting Date- July 18, 2023	Construction
04-C004-116 (Imported)	FM-C004(116)--55-04, Acct ID- 38373, Letting Date- February 15, 2022	Construction
09-C009-088 (Imported)	TEST FOR WORKDAY_Construction date_BROS-SWAP-C009(88)--FE-09, AcctID- 37865, Letting Date- 20 July 2021	Construction
15-C015-072 (Imported)	BROS-SWAP-C015(72)--FE-15, AcctID- 37709, Letting Date- 20 April 2021	Construction

When a project is complete, use this button to archive it.

The Status area will show which types of projects you are actively viewing.

Use the pull-down menu to change between New, Under Construction, Completed, Archived, and Favorite projects.

## 2 - Setting up Appia & “My Account” Screen

## Activating & Setting up Appia

Appia and DocExpress are web-based products produced by Infotech. Appia and DocExpress are both provided to local agencies through the DOT's parent license at no direct cost to the local agencies. In order to establish the Appia account, the local agency needs to contact the E-Construction Administrator in the Local Systems Bureau. Contact information for the E-Construction Administrator is found on the [Local Systems Bureau Organization Chart](#). The E-Construction Administrator will contact Infotech and give them the "ok" to activate the local's account. Infotech will activate the account and will contact the local agency to assist in setting them up with the appropriate reference data.

Once a local agency's Appia account is established, they can add users, projects, etc. at their own discretion.

## My Account

The "Account settings" page is where your agency's entire Infotech account is managed. The users and account information shown in the "Account settings" page apply to all Infotech products your agency uses, including both DocExpress and Appia. This page is NOT Appia specific. You will generally only add users under the "Account settings" page if they are new to your organization and have never accessed either DocExpress or Appia.

Users are added to your Infotech account via the "Account settings" screen. To access it, click on the circle with your initials in the upper, right corner. Then click on "Account settings" in the pop-up box.

The screenshot displays the Infotech 'My Account' interface. On the left is a dark sidebar with icons for 'MY ACCOUNT', 'DIGITAL ID', 'PAYMENTS', and 'NOTICES'. The main content area shows the user 'Nicole Stinn' with an 'Edit' button and an 'Actions' dropdown. Below this is a table of contact information:

Email	niki.stinn@iowadot.us
Mobile	---
Phone	(515) 239-1064
Fax	---
Time Zone	Eastern Time (US & Canada)

To the right of the contact info is a card for 'Iowa Local Systems' with address and phone number. Below that is a 'Search for Employees' bar and a table with columns: Name, Email, Role, Legacy Digital ID, Multi-Browser ID.

In the top right corner, a circular profile icon with initials 'NS' is circled in green. A dropdown menu is open from this icon, also with a green circle around the 'Account settings' option. The menu includes the user's name, email, agency name, and buttons for 'Account settings', 'Sign out', and 'Legal Notices'.

The “Account settings” screen is shown here. To add an employee to your agency’s Infotech account, click on the “Invite Employees” button.

The screenshot displays the Infotech account settings interface. On the left sidebar, the 'MY ACCOUNT' section is active, and the 'DIGITAL ID' button is circled in red with a diagonal line through it. The main content area shows the user profile for Nicole Stinn, with fields for Email, Mobile, Phone, Fax, and Time Zone. To the right, the agency information for Iowa Local Systems is displayed, including the address and phone number. Below this, there is a search bar for employees and a table listing existing employees. The 'Invite Employees' button is circled in green in the top right corner of the main content area.

Name	Email	Role	Legacy Digital ID	Multi-Browser ID
Andrew Cox	andrew.cox@iowadot.us	User		
Appia Student 00	appiastudent@gmail.com	User		

**Note: Local agencies should NOT add any consultants to their account even if the consultant is working on a local agency’s project. Consultants MUST purchase their own license.**

**Note: Do NOT create a “Digital ID” from the “My Account” screen. This is for BidExpress only and is NOT used for either Appia or DocExpress. (There is a different place and process for creating a Digital ID to sign contracts in DocExpress.)**

This pop-up window will appear. Type the email address for the employee into the box. When finished entering email addresses, click “Invite Employees”.

Invite Employees

! ONE E-MAIL PER LINE

nicole.moore@iowadot.us

Invite Employees Cancel

You will be brought back to the “My Account” screen where a green ribbon will show saying the invitation has been sent.

The screenshot displays the 'My Account' interface for Nicole Stinn. On the left is a dark sidebar with icons for 'MY ACCOUNT', 'DIGITAL ID', 'PAYMENTS', and 'NOTICES'. The main content area is divided into two sections. The left section shows Nicole Stinn's profile with fields for Email (niki.stinn@iowadot.us), Mobile, Phone ((515) 239-1529), Fax, and Time Zone (Eastern Time (US & Canada)). The right section shows the account details for 'Iowa Local Systems \_DEMO ACCOUNT' with address and phone information. A prominent green notification ribbon with a checkmark icon and the text '1 Employee Invitation sent.' is overlaid on the right section, circled in green. Below the ribbon, there is a '1 Pending Invitation - Show' link and an 'Invite Employees' button. At the bottom right, there is a search bar for employees and a table listing existing users.

Name	Email	Role	Legacy Digital ID	Multi-Browser ID	Action
Andrew Cox	andrew.cox@iowadot.us	User			Action
Appia Student 00	appiastudent@gmail.com	User			Action

After sending the invitation, the employee will receive an email from Infotech that includes an invitation to join the account. After the employee provides their credentials, they will be added to the account and will be included in your user's listing. After the employee is added to the account, you can adjust their Role by clicking on the gray Actions drop-down found to the right of their name and choosing Change Role. You may also remove employees that have left the agency by clicking on the gray Actions drop-down and selecting "Remove".

The screenshot displays the IOWADOT user management interface. At the top left is the IOWADOT logo with the tagline "GETTING YOU THERE". To its right is the address "500 Lincoln Way, Ames, IA 50010" and the phone number "(515) 509-9398". A blue "Invite Employees" button is located in the top right. Below this is a search bar with the placeholder text "Search for Employees" and a "Search" button. The main content area features a table with the following columns: "Name", "Email", "Role", "Legacy Digital ID", and "Multi-Browser ID". The table lists three employees: Noah Thomas, Ross Wood, and Sophy Yang. The first row, for Noah Thomas, is highlighted in yellow. To the right of the "Role" column for Noah Thomas is a gray "Actions" dropdown menu, which is circled in green. The dropdown menu is open, showing two options: "Change role" (a blue link) and "Remove" (a red link). The "Actions" dropdown for the third employee, Sophy Yang, is also visible.

Name	Email	Role	Legacy Digital ID	Multi-Browser ID
Noah Thomas	noah.thomas@iowadot.us	User		
Ross Wood	ross.wood@iowadot.us	User		
Sophy Yang	sophy.yang@iowadot.us	User		

To return to Appia or Doc Express from the Account settings screen, click on the four-square box found near the upper right corner of the screen. Then, select either Appia or Doc Express from the pop-up box.

The screenshot displays the infotech user interface. On the left is a sidebar with navigation links: MY ACCOUNT, DIGITAL ID, PAYMENTS, and NOTICES. The main content area is titled 'Logged in!' and shows the profile of Nicole Stinn with fields for Email, Mobile, Phone, Fax, and Time Zone. To the right of the profile is the company information for Iowa Local Systems, including their address and phone number. Below this is a search bar for employees and a table listing employees, with Andrew Cox as the only entry shown. In the top right corner, a four-square menu icon is highlighted with a green circle, and a dropdown menu is open, showing options: Appia, Bld Express, Doc Express, Signet, and Release notes. The 'Appia' and 'Bld Express' options are also circled in green.

Name	Email	Role	Legacy Digital ID	Multi-Browser ID
Andrew Cox	andrew.cox@iowadot.us	User		



# 3 - Setting Up a Project Using Method 1: “Create Project” via .csv Import

There are two options for setting up a project in Appia:

- 1) Creating a Project
- 2) Importing a Project

The screenshot displays the 'My Projects' section of the Appia application. The left sidebar contains navigation links: MY PROJECTS (highlighted), REFERENCE DATA, SYSTEM MGT, EXPORT DATA, and HELP. The main content area shows a 'Projects' header with a search bar and filters. Two buttons, 'Create Project' and 'Import Project', are visible, with green boxes and arrows labeled '1' and '2' respectively. Below these, a table lists projects under the 'Under Construction' status.

Project ID	Description
03-C003-062 Imported	03-C003-062
11-C011-071 Imported	STP-S-C011(71)--5E-11 - 29427
36-C036-074 JSON TEST/FINANCE Imported	
BHM-SWAP-1827(684)--SA-82-1 12345	Reconstruction Bridge Deck
BROS-C004(103)--8J-04 - 35155	On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.
BROS-C078(111)--FF-78_Payment for Multiple Sections	Letting Date 4/21/2020
BRS-C036(74)--60-36 - AcctID	Letting Date: 04/01/20

## Method #1 – Creating a project

This method is used when importing a .csv file that contains the bid item information and unit prices. The remaining details of the project are entered manually.

Note: For DOT-administered projects, this .csv file method has been replaced by the .json method. Therefore, for DOT-administered projects, please see section [Setting Up a Project Using Method 2: "Import Project" via .json Import](#) for guidance on creating a project using that method.

The .csv file for projects let using the ICEA Service Bureau’s “Local Letting Toolkit” can be exported from that program and can be used immediately. The .csv file can be generated by clicking on the “Bids” button in the project process listing, then “Bid Tab” tab at the top, then “Excel” as shown below. Do NOT use the “Appia Export” button to get a .csv file. It will NOT generate the correct file. Once you have the .csv file, DELETE any and all columns containing unit prices and extended prices for the Engineer’s Estimate and non-low bidders. Also, DELETE the two rows at the bottom containing the contract total and percent of estimate.

The screenshot displays the 'Local Lettings' software interface. At the top, there's a navigation bar with 'Projects', 'Contractors', 'Bid Items', and 'Officials'. Below this is a search bar and buttons for 'Add Project' and 'Import From TPMS'. A message banner states: 'This project has been Closed. Changes are no longer allowed.' The main area is divided into a left sidebar and a right pane. The sidebar contains a list of project items with columns for 'Letting Date', 'Project Number', 'Name', 'Bid Type', and 'Status'. The right pane shows the 'Bids' tab selected, with a table of bid items. The 'Appia Export' button is circled in yellow, and the 'Excel' button is circled in green. The 'Bids' button in the sidebar is also circled in green.

Letting Date	Project Number	Name	Bid Type	Status
4/6/2020	L-2020-01--73-86	Bridge 09041 Materials	Formal	Active
9/16/2016	L-2017-01--73-86	Columbia 31 Bridge Materi...	Formal	Closed
10/27/2014	LFM-2015-01--7...	Columbia Stub Resurfacing	Formal	Closed
8/25/2014	L-2015-02--73-86	Buckingham Pavement	Formal	Closed
4/16/2013	L-2013-01--73-86	T47 / E29 / UGL Resurfacing	Formal	Closed
	L-10342--73-86	Bridge 10342	Formal	Cancelled

Item Number/Description	Quantity	Units	Unit Price
1. 2102-0425070 SPECIAL BACKFILL	861.2	TON	\$35.0
2. 2102-2713090 EXCAVATION, CLASS 13, WASTE	607.8	CY	\$25.0
3. 2121-7425020 GRANULAR SHOULDERS, TYPE B	3641.6	TON	\$25.0
4. 2213-7100400 RELOCATION OF MAIL BOXES	5	EACH	\$175.0
5. 2214-5145150 PAVEMENT SCARIFICATION	37618.2	SY	\$3.2
6. 2301-9091000 RUMBLE STRIP PANEL (PCC SURFACE)	2	EACH	\$275.0
7. 2310-5151040 PORTLAND CEMENT CONCRETE OVERLAY, FURNIS...	6869.8	CY	\$91.0
2310-5151551	36846.3	SY	\$4.2

Once you have the .csv file (either from the Iowa DOT, the Service Bureau, or self-generated), click on the “Create Project” button.

The screenshot shows a web application interface for managing projects. On the left is a dark sidebar with navigation icons and labels: 'MY PROJECTS' (highlighted in red), 'REFERENCE DATA', 'SYSTEM MGT', 'EXPORT DATA', and 'HELP'. The main content area is titled 'My Projects' and includes a search bar labeled 'Find Project', a status filter set to 'Under Construction', and an 'Advanced' view toggle. Two buttons, 'Create Project' and 'Import Project', are located at the top right of the main area, with 'Create Project' circled in green. Below these is a table titled 'Under Construction' with columns 'Project ID' and 'Description'. The table lists several projects, some marked as 'Imported' with a yellow tag. Each row has a star icon on the left and a plus icon on the right.

Project ID	Description
03-C003-062 Imported	03-C003-062
11-C011-071 Imported	STP-S-C011(71)--5E-11 - 29427
36-C036-074 JSON TEST/FINANCE Imported	
BHM-SWAP-1827(684)--SA-82-1 12345	Reconstruction Bridge Deck
BROS-C004(103)--8J-04 - 35155	On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.
BROS-C078(111)--FF-78_Payment for Multiple Sections	Letting Date 4/21/2020
BRS-C036(74)--60-36 - AcctID	Letting Date: 04/01/20

A screen will appear in which you will enter some of the basic overview information for the new project.

- The “Project ID” should follow the following format: “Contract ID”.
  - The Contract ID can be found on your contract.
- The “Work Type” should match the work type shown on your contract. A pull-down list should be present of all the available work types. This list is part of your reference data.
  - Examples of work types include but are not limited to: Bridge Replacement – CCS, Grading, PCC Overlay – Unbonded, Etc.
  - You can start typing the name of the work, and all applicable choices will populate in the drop-down menu.
- The “Description” section should contain the Project Number, Accounting ID Number (for DOT let projects), and letting date but can also include any additional descriptive information desired.
- The “Location” should match the location shown on the contract.
- A DBE, MBE, or WBE goal % can be entered. These fields are for information only and do not affect anything further in the project.
- If importing a .csv file with the bid tabs for the **low bidder only**, choose “I’m not going to analyze or award bids.”

Click "Save" when finished entering information.

The screenshot shows a web application interface for creating a new project. On the left is a dark sidebar with navigation links: 'MY PROJECTS' (with a document icon), 'REFERENCE DATA' (with a book icon), 'SYSTEM MGT' (with a gear icon), and 'EXPORT DATA' (with an upload icon). The main content area is titled 'Projects / New' and 'New'. It contains several input fields: 'Project ID' with the value '86-C086-060 - 31961', 'Work Type' with a dropdown menu showing 'BRIDGE REPLACEMENT - PPCB', and a 'Description' text area containing 'Gladbrook Bridge Replacement' and 'Letting Date: October 21, 2014'. To the right of these are three percentage goal fields: 'DBE % Goal' (0.000%), 'MBE % Goal' (0.000%), and 'WBE % Goal' (0.000%). Below these is a section titled '\* Please select one of the following.' with two radio button options: 'I'm not going to analyze or award bids.' (which is selected) and 'I'm going to import bids for analysis and award.' At the bottom is a 'Project Location' section with a 'Location' field containing 'C A' and a small note: 'Use a physical location, like: 4 miles south of southbound on-ramp'. In the top right corner of the form, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is highlighted with a green circle.

Projects / New

New

\* Project ID  
86-C086-060 - 31961

Work Type  
BRIDGE REPLACEMENT - PPCB

Description  
14px B I U [text alignment icons] [list icons] ...  
Gladbrook Bridge Replacement  
Letting Date: October 21, 2014

DBE % Goal  
0.000%

MBE % Goal  
0.000%

WBE % Goal  
0.000%

\* Please select one of the following.  
☒ I'm not going to analyze or award bids.  
☐ I'm going to import bids for analysis and award.

Project Location

Location  
C A

Use a physical location, like: 4 miles south of southbound on-ramp

Save Cancel

If there are no errors, you will be brought back to the Overview screen, which should reflect the information just entered.

The screenshot displays the 'Overview' screen for a project. At the top, a green banner indicates 'The project has been updated successfully.' The left sidebar contains navigation options: OVERVIEW, ALL REPORTS, ITEMS, TIME LIMITS, FUNDING, and MORE. The main content area shows the project ID '86-C086-060 - 31961' with a 'New' tag and the letting date 'October 21, 2014'. Below this, the 'Overview' section is divided into three columns. The first column, 'General Info', lists 'Created By' (Nicole Stinn), 'Work Type' (BRIDGE REPLACEMENT - PPCB), 'Location' (C A), and 'Description' (Gladbrook Bridge Replacement). The second column, 'Important Dates', shows the 'Date Created' as '09/01/2020'. The third column, 'Project Amounts', shows the 'Total' as '\$0.00'. At the bottom left, a 'Goals' section features a circular progress indicator showing '3.087%'.

Projects / 86-C086-060 - 31961

86-C086-060 - 31961 New  
Gladbrook Bridge Replacement Letting Date: October 21, 2014

Import Items

Overview Edit

General Info

Created By  
Nicole Stinn

Work Type  
BRIDGE REPLACEMENT - PPCB

Location  
C A

Description  
Gladbrook Bridge Replacement  
Letting Date: October 21, 2014

Important Dates

09/01/2020  
Date Created

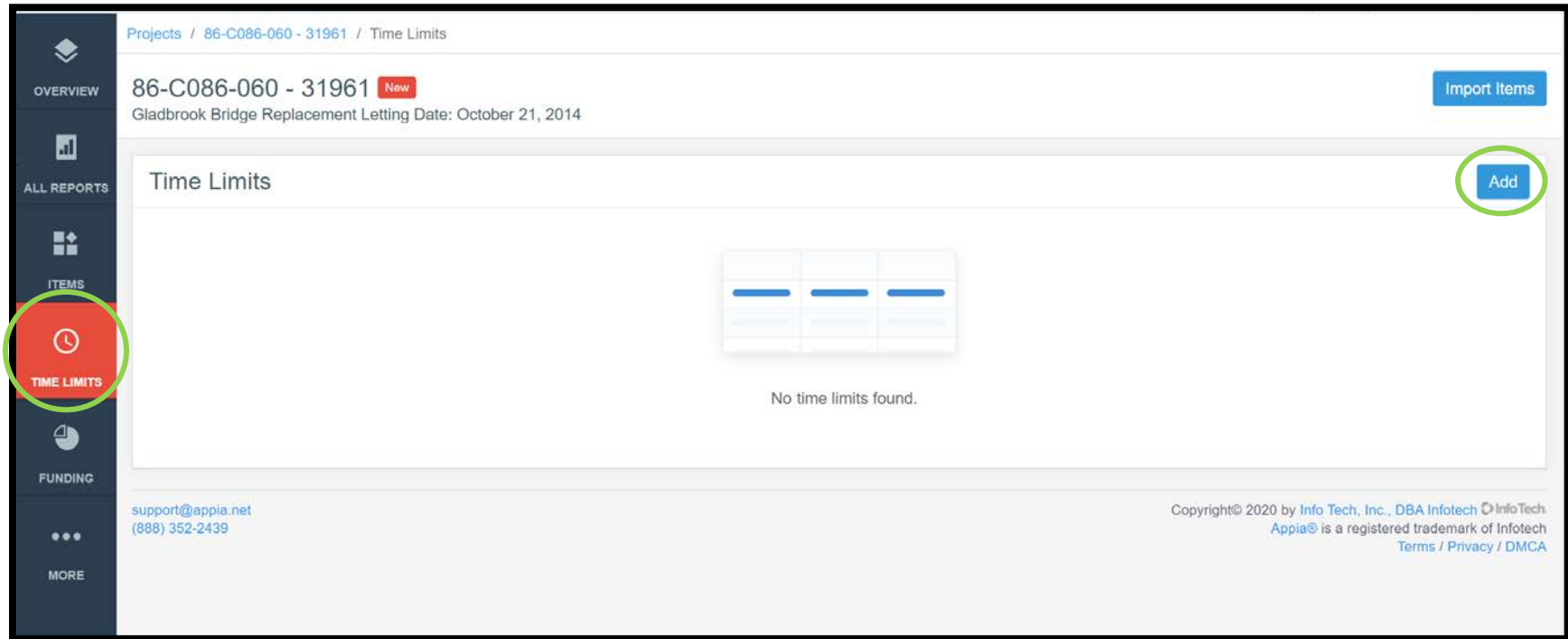
Project Amounts

\$0.00  
Total

Goals

3.087%

Now that you have the basic information entered, the next step is to enter “Time Limits”. Click on the “Time Limits” button in the menu bar on the left side of the screen. Then click “Add” on the right side of the screen.



This screen will appear. Enter the time constraint information for your project. All of this information can be found on the contract.

- Enter the “Type” of time constraint your project has. Most DOT-let contracts are “Working Day” contracts, but sometimes “Completion Date” is used as well.
  - Available choices are “Calendar Days”, “Completion Date”, and “Working Days”.
- In the “Description” field, enter the late start date or completion date applicable to your contract. Also, enter the amount of liquidated damages per day.
- “Primary Deadline” may be checked “yes” for large projects which involve intermediate deadlines or site times. This is not needed on most projects.
- The “Deadline Days” or “Deadline Date” are the number of working days, calendar days, or completion date as applicable.
- **Do NOT enter the “Liquidated Damages” as shown on your contract.**



- Note: Appia does NOT automatically start charging working days according to what you enter here. Time charges always have to be manual inputs.
- Once the working day or calendar day limit is reached, or the completion date is exceeded, according to the charges you record in the Time Limits section, Appia WILL automatically calculate liquidated damages and will deduct those damages from the “bottom line” of the next payment voucher. This is NOT the way the Iowa DOT processes liquidated damages. Rather, the DOT requires you to process a change order to add a line item for liquidated damages. For this reason, **you should enter \$0.00 in the “Liquidated Damages” field.**
- Click “Save” near the upper right corner when finished entering the time limit information.

Working Days option picked

Projects / 86-C086-060 - 31961 / Time Limits / New

86-C086-060 - 31961 New  
Gladbrook Bridge Replacement Letting Date: October 21, 2014

Import Items

### New Time Limit

**\* Type**  
Working Days

**\* Description**  
Late Start Date: 04/06/2015  
Liquidated Damages: \$1,200.00/day

**Primary Deadline?**  
☐ NO

**\* Deadline Days**  
0.0

**Liquidated Damages**  
\$0.00

Save Cancel

Completion Date option picked

Projects / 86-C086-060 - 31961 / Time Limits / New

86-C086-060 - 31961 New Import Items

Gladbrook Bridge Replacement Letting Date: October 21, 2014

### New Time Limit

Save Cancel

\* Type  
Completion Date

\* Description  
Completion Date: 04/06/17  
Liquidated Damages: \$1,200.00/day

Primary Deadline?  
☐ NO

\* Deadline Date  
04/06/17

Liquidated Damages  
\$0.00

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The following screen will appear. There should be a green ribbon at the top saying, “The time limit has been saved successfully”.

The time limit has been saved successfully.

Projects / 86-C086-060 - 31961 / Time Limits

86-C086-060 - 31961 New Import Items

Gladbrook Bridge Replacement Letting Date: October 21, 2014

### Time Limits

Add

Description	Liquidated Damages per Day	Deadline
Late Start Date: 04/06/2015 Liquidated Damages: \$1,200.00/day	\$0.00	0.0 Working Days

Displaying 1 time limit

# 4 - Creating Funding Packages and Sources

*Note: If the .json file provided by Local Systems is imported to set up the project, all of the funding package and funding source for the original contract will be set up automatically. This section need only be used if funding is added or changed throughout the course of the project.*

One “Default” funding package and source will always be created when a project is created. If it is necessary (see below) to add additional funding packages or sources, or if you would like to rename the “default” package and source, click on the “Funding” button in the left menu and then the “Edit” button near the upper right corner.

**\*\*If you know you only have a single funding package or source, you can skip this section and continue with the [Project Settings](#) section.**

The screenshot displays the 'Funding' section of a project management application. The left sidebar contains a menu with 'OVERVIEW', 'ALL REPORTS', 'ITEMS', 'TIME LIMITS', 'FUNDING' (highlighted with a red circle), and 'MORE'. The main content area shows the project details for '86-C086-060 - 31961' with a 'New' status and a 'Gladbrook Bridge Replacement' letting date of October 21, 2014. An 'Import Items' button is in the top right. Below the project details, there is a table for 'Funding' with columns for 'Fund Source' and 'Fund Package'. The table lists 'Default Fund Source' and 'Default Fund Package' with values '\$0.00' and '100.000%'. An 'Edit' button is circled in green in the top right corner of the table. Below the table, there is an 'Items' section with a placeholder for a table and the text 'No items found.' The footer includes contact information for support@apia.net and a copyright notice for Info Tech, Inc.

Fund Source	Fund Package
Default Fund Source	Default Fund Package
	\$0.00 100.000%

The following screen will appear. Click on “Add Package” and/or “Add Source” near the upper right corner to add as many funding packages and sources as necessary. (See next page for explanation of funding packages and sources.)

Projects / 86-C086-060 - 31961 / Funding / Edit Fund Source & Fund Package

86-C086-060 - 31961 New Import Items

Gladbrook Bridge Replacement Letting Date: October 21, 2014

**Funding** Save Add Package Add Source Cancel

Fund Source	Fund Package
<input type="checkbox"/> Show funding in dollars? <span>NO</span>	Default Fund Package
Default Fund Source	100.000%

support@appia.net  
(888) 352-2439

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If applicable, enter the funding packages and/or sources for the project by going to the “Funding” button in the left menu bar. To distinguish funding packages vs. funding sources, think of a basket filled with eggs. A funding package is the basket, and the eggs within the basket are funding sources. All funding sources within a package must add up to 100%.

Payment reports (vouchers) can be generated which show only certain funding packages or sources. Therefore, if a local agency has a project with multiple funding “pots” and they wish to be able to generate a payment report showing only one of those categories of funding, they will need to set up their packages and sources accordingly.

Contract bid items can have split funding packages and sources applied to them in the event an item contains multiple funding components.

\*If a contract only contains a single funding component, it is NOT necessary to visit the “Funding” section.

### Counties

Counties will be **required** to create multiple funding **packages** if the need exists from a DOT payment perspective. To determine if the need exists, see the first bullet point below. If the need does not exist, it is up to the user whether they would like to set up funding packages for their own use.

- From the DOT perspective, the need exists for multiple funding packages if a contract contains multiple funding packages. A contract contains multiple funding **packages** if it has a component paid through the FM account and a component NOT paid through the FM account.
- In other words, a funding **package** must be created in your project for:
  - 1) Payments that flow through the Farm-to-Market account
  - 2) Payments that do NOT flow through the Farm-to-Market account, which are locally paid and then reimbursed.
- Examples of contracts requiring multiple funding **packages** include but are not limited to the following:
  - A STBG-Swap project/division on a FM route tied with a locally funded project.
  - A FM paving project/division tied with a locally funded project.
  - A FM paving project/division tied with a bridge on a non-FM route.
  - A FM bridge project/division tied with a bridge on a non-FM route.
  - A FM bridge or paving project/division with a separately paid City division.
- For a contract containing items from multiple funding sources that is NOT on the FM system, the DOT will not need the contract/projects to be broken down into the various funding sources, but the user may do so for their own purposes if they wish. This is because any projects not on the FM system are locally paid and then reimbursed. In that scenario, the local is doing the work of separating out the funding streams and seeking reimbursement appropriately rather than the DOT making payment through the correct accounts up front.

Funding **sources** would be used when a funding **package** includes multiple components. In the case of the counties, as explained above, there are two funding **package** designations, FM and non-FM. If either of those packages has multiple funding components, those components would be considered funding **sources**. Counties will not be **required** to enter multiple funding **sources**. However, in projects where the county will seek reimbursement for one funding source, such as HSIP funding, they will need to show a breakdown of items paid from that funding source when submitting their reimbursement request. Setting these sources up in Appia is an easy way to accomplish the needed tracking. Counties may also wish to track sources for their own purposes.

- Examples of funding **sources** in a FM **package** may include but are not limited to:
  - An STBG project on an FM route containing both STBG and FM funds.
  - An STBG project on an FM route containing both STBG and local funds.
  - An STBG project on an FM route containing both STBG and HSIP/TSIP/CSTEP/other funds.
  - A FM project containing both FM and HSIP/TSIP/CSTEP/other funds.
  - An HBP project on a FM route containing both HBP and FM funds.
  - An HBP project on a FM route containing both HBP and local funds.
  - An HBP project on a FM route containing both State and local funds.
- Example of funding **sources** in a Non-FM package may include but are not limited to:
  - A STBG project on a non-FM route (rare but it exists) containing both STBG and local funds.
  - An HBP project on a non-FM route containing both HBP and local funds.
  - An HBP project on a non-FM route containing both HBP and State funds.
  - A TAP project containing both TAP and local funds.
  - Any other projects on non-FM routes containing multiple funding components.

### Cities

Since all city projects are locally paid and then reimbursed, the local must do the work of separating out costs into different funding packages. Therefore, since the DOT is not having to process payments from multiple accounts shown on a voucher, from a DOT payment perspective, there is no **requirement** to set up multiple funding **packages** or **sources**. That being said, setting up those funding packages and/or sources may aid the city in figuring out what the appropriate amounts are for reimbursement requests since documentation of payment on appropriate items will be needed to supplement any reimbursement requests. Also, the city may wish to track the funding for their own purposes whether the project has DOT reimbursement or not.

**\*\*Funding is hard to explain and can be complicated. Please contact Niki Stinn at [Niki.Stinn@iowadot.us](mailto:Niki.Stinn@iowadot.us) if you would like to talk through the set-up of a project.**

Here, one additional funding package and one additional funding source have been added. Funding packages and sources can also be deleted by clicking on the red circles with the “x”s shown in the boxes containing the additional components.

Projects / 86-C086-060 - 31961 / Funding / Edit Fund Source & Fund Package

86-C086-060 - 31961 New  
Gladbrook Bridge Replacement Letting Date: October 21, 2014

**Funding** Save Add Package Add Source Cancel

Fund Source	Fund Package
<input type="checkbox"/> Show funding in dollars? <input type="text"/> Default Fund Source <input type="text"/> <b>New Fund Source</b> <span>✕</span>	<input type="text"/> Default Fund Package <input type="text"/> 100.000% <input type="text"/> 100.000% <input type="text"/> <b>New Fund Package</b> <span>✕</span>
<input type="text"/> 0.000% <input type="text"/> 0.000%	<input type="text"/> 100.000% <input type="text"/> 0.000%

Funding packages and sources may be renamed by simply clicking in the boxes containing the descriptions and editing the text. The funding source split within each package can be altered by clicking in the box with the % for the **newly added** source.

Projects / 86-C086-060 - 31961 / Funding / Edit Fund Source & Fund Package

86-C086-060 - 31961 New  
Gladbrook Bridge Replacement Letting Date: October 21, 2014

**Funding** Save Add Package Add Source Cancel

Fund Source	Fund Package
<input type="checkbox"/> Show funding in dollars? <input type="text"/> Farm-to-Market <input type="text"/> TSIP <span>✕</span>	<input type="text"/> <b>Local or Non-FM</b> <span>✕</span> <input type="text"/> 90.000% <input type="text"/> 100.000% <input type="text"/> 10.000% <input type="text"/> 0.000%

Also, note that the toggle switch can be used to switch from a % view to a \$ view. **However, at this time, there is no way to “cap” and prioritize funding sources.** The DOT is currently working with Infotech to build this functionality into Appia.



Here is an example of a federal aid bridge project on a non-FM route which utilizes 80% federal-aid HBP funding with a 20% local match. The percentage field for the primary funding source is not editable. To change funding shares, edit the field for one of the “match” sources. The primary funding source percentage will automatically adjust so that all funding sources sum to 100%.

The screenshot shows the 'Funding' section of a software interface. At the top, the project ID '86-C086-060 - 31961' is displayed with a 'New' status tag and the letting date 'October 21, 2014'. On the left sidebar, the 'FUNDING' tab is selected. The main area contains a table with two columns: 'Fund Source' and 'Fund Package'. The first row shows 'HBP' as the source and 'HBP Federal Aid (Non-FM)' as the package, with a percentage of '80.000%'. The second row shows 'Local' as the source and an empty package field, with a percentage of '20.000%'. A green circle highlights the '20.000%' value. Above the table, there are buttons for 'Save', 'Add Package', 'Add Source', and 'Cancel'. A toggle switch for 'Show funding in dollars?' is set to 'NO'.

Fund Source	Fund Package	Percentage
HBP	HBP Federal Aid (Non-FM)	80.000%
Local		20.000%

Click “Save” when finished entering funding information.

This screenshot is identical to the previous one, showing the 'Funding' form with the same data. However, a green circle now highlights the 'Save' button in the top right corner of the form area, indicating the next step in the process.

Note: Funding packages and sources will be assigned to bid item or sections in later steps. (See the [Contracts with Multiple Funding Packages](#) section of this instruction manual.)

If you were successful at creating the funding categories, this screen will appear with a green ribbon across the top.

OVERVIEW

ALL REPORTS

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MORE

Project funding has been updated successfully.

Projects / 86-C086-060 - 31961 / Funding

86-C086-060 - 31961 New  
Gladbrook Bridge Replacement Letting Date: October 21, 2014

Import Items

Funding

Edit

Fund Source	Fund Package
	HBP Federal Aid (Non-FM)
HBP	\$0.00 80.000%
Local	\$0.00 20.000%

Items

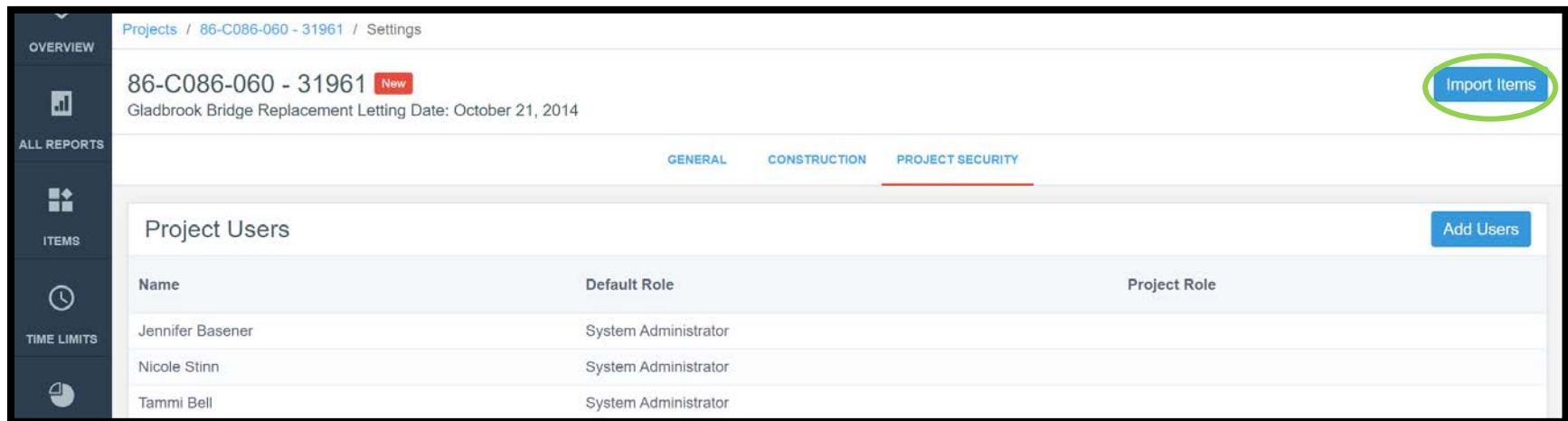
No items found.

## 5 - Creating Bid Items by Importing the .csv Bid Tabulation File

*Note: If the contract is let through the Iowa DOT, the .json file provided by Local Systems should be used to set up the project, and the instructions in this section need not be used. Contact Doug Heeren if you are in need of a file for a DOT-let project but have not received one.*

The last step before “Advance to Construction” is to add the bid items, quantities, and unit prices to the project.

To do this, either select the “Import Items” button that appears in the top, right corner of many screens.

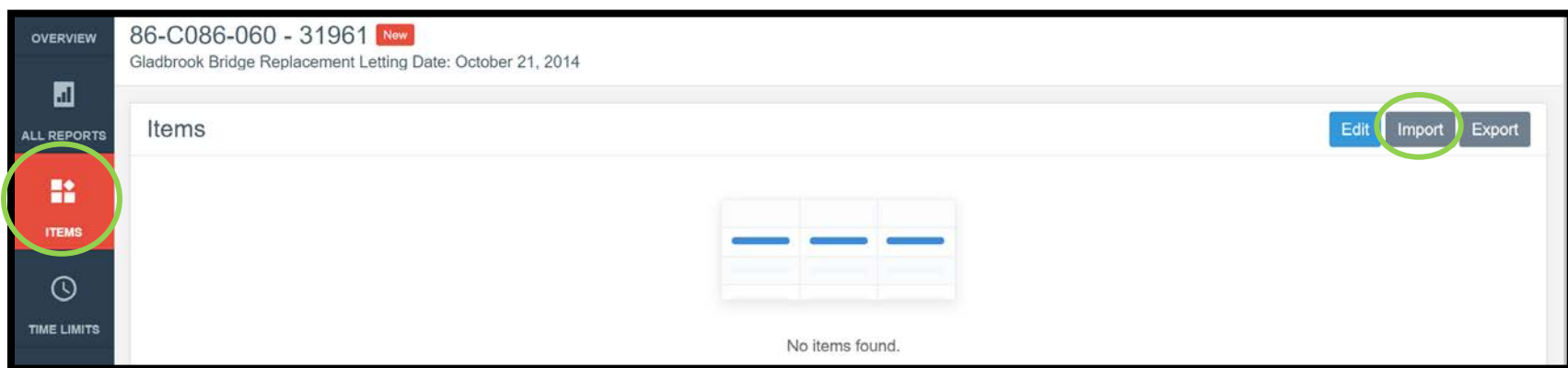


The screenshot shows the 'Project Users' screen for project 86-C086-060 - 31961. The left sidebar contains navigation options: OVERVIEW, ALL REPORTS, ITEMS, and TIME LIMITS. The main content area has tabs for GENERAL, CONSTRUCTION, and PROJECT SECURITY. The 'PROJECT SECURITY' tab is active, showing a table of project users. In the top right corner, the 'Import Items' button is circled in green.

Name	Default Role	Project Role
Jennifer Basener	System Administrator	
Nicole Stinn	System Administrator	
Tammi Bell	System Administrator	

OR

Select the “Items” button from the left menu bar and then “Import”.



The screenshot shows the 'Items' screen for project 86-C086-060 - 31961. The left sidebar has the 'ITEMS' button circled in green. The main content area shows a table with no items found. In the top right corner, the 'Import' button is circled in green.



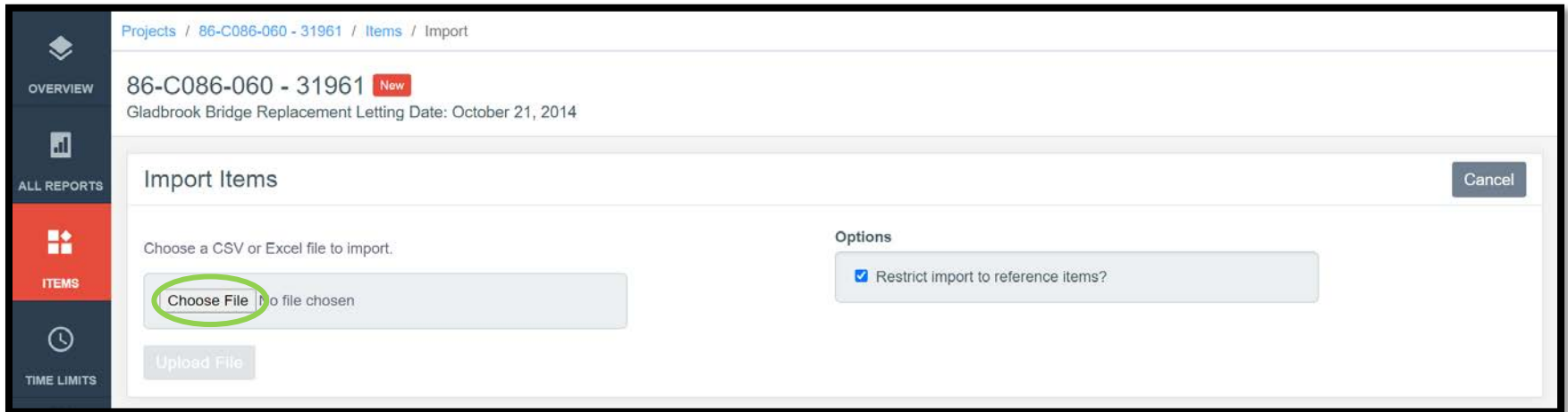
No items found.

Either path will bring you to this screen.

STOP: If your project contains multiple funding packages, open your .csv bid tabulation file and alter it as described in the [Contracts with Multiple Projects/Divisions](#) section before continuing as shown below.

STOP: If you are using a .csv file from the Service Bureau “Local Letting Toolkit”, make sure you have read the directions for amending the file as shown in the [Setting Up a Project Using Method 1: “Create Project via .csv Import](#) section of this instruction manual.

Click on “Choose File” to browse your computer for your .csv bid tabulation file.



Projects / 86-C086-060 - 31961 / Items / Import

86-C086-060 - 31961 New  
Gladbrook Bridge Replacement Letting Date: October 21, 2014

### Import Items Cancel

Choose a CSV or Excel file to import.

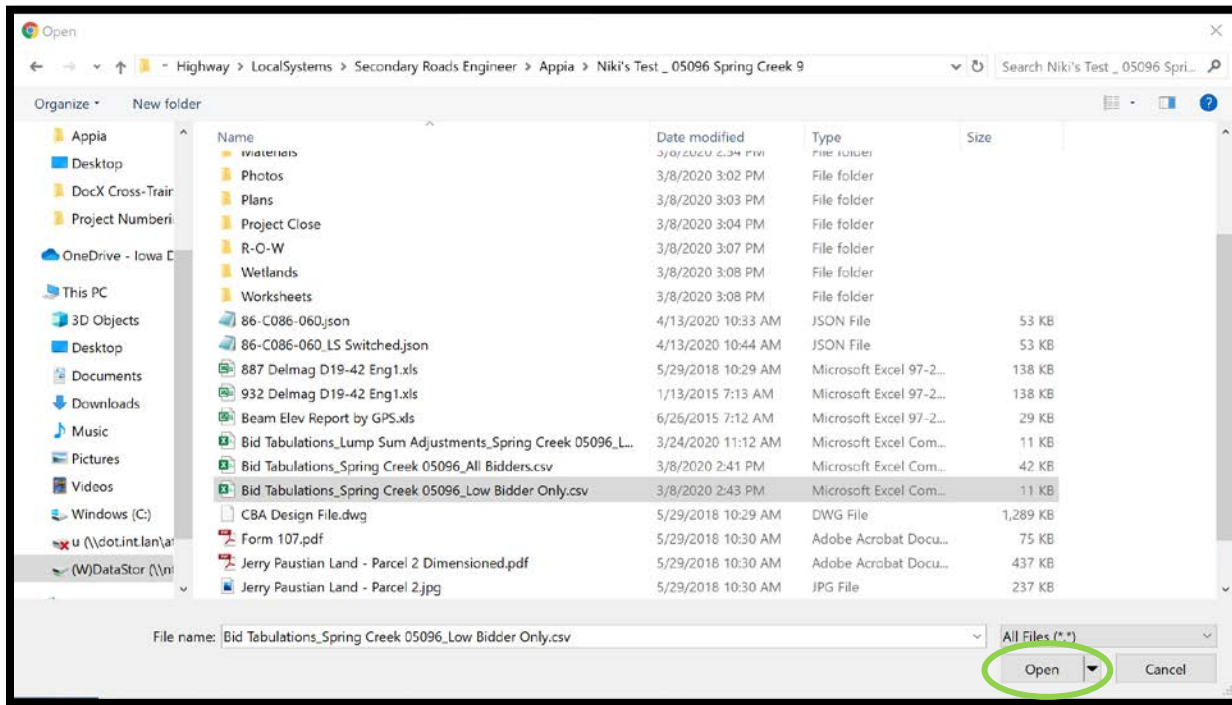
Choose File No file chosen

Upload File

**Options**

☒ Restrict import to reference items?

Select the desired file from your file explorer window and click “Open”.



The file name of the file you chose should now show up to the right of the “Choose File” button.

Leave the “Restrict import to reference items?” box checked.

Click on “Upload File”.

The screenshot shows the 'Import Items' page in the Appia system. The left sidebar contains navigation links: OVERVIEW, ALL REPORTS, ITEMS (highlighted in red), TIME LIMITS, and FUNDING. The main content area has a breadcrumb trail: Projects / 86-C086-060 - 31961 / Items / Import. Below this, the project name '86-C086-060 - 31961' is displayed with a 'New' tag, followed by the text 'Gladbrook Bridge Replacement Letting Date: October 21, 2014'. The 'Import Items' section includes a 'Choose File' button and a text field containing the filename 'Bid Tabulations\_Spring ...096\_Low Bidder Only.csv'. Below the text field is a blue 'Upload File' button, which is circled in green. To the right, under the 'Options' heading, there is a checked checkbox for 'Restrict import to reference items?'. A 'Cancel' button is located in the top right corner of the import section. The footer contains contact information for support@appia.net and copyright information for Info Tech, Inc., DBA Infotech.

If the .csv file is uploaded successfully, you will be brought to this screen.

DOT File – No longer applicable

ICEA Service Bureau File

Projects / LFM-2015-01--7X-86 - CSV / Items / Import

### LFM-2015-01--7X-86 - CSV New

Columbia Stub Resurfacing Letting Date: 10/27/14

#### Import Items

Import Cancel

**If no section is specified, import items into a new section or into the default section.**

**Default Section**

**\*\* None Selected \*\***

If no section is specified, import items into a new section or into the default section.

**Select number of rows to skip**

**\*\* None Selected \*\***

Preview (first 10 out of 24 rows)

**Options**

☒ Clear project items before import?

Unassigned Column

Unassigned Column

Unassigned Column

Unassigned Column

Unassigned Column

Unassigned Column

Unassigned Column

Unassigned Column

LFM-2015-01--7X-86 Bid  
Tabulation Tama County  
Work Type: PCC Overlay  
(Unbonded) Letting Date:  
10/27/2014 09:30 AM

Tama County

Apparent Low Bid

Engineer's Estimate

MANATT'S, INC. 1775  
OLD HIGHWAY 6  
BROOKLYN, IA 52211-  
0535

	Item Number	Description	Units	Quantity	Unit Price	Extended Price	Unit Price
1	2102-0425070	SPECIAL BACKFILL	TON	861.2	35.0	30142.0	21.0
2	2102-2713090	EXCAVATION, CLASS 13, WASTE	CY	607.8	25.0	15195.0	12.0
3	2121-7425020	GRANULAR SHOULDERS, TYPE B	TON	3641.6	25.0	91040.0	18.5
4	2213-7100400	RELOCATION OF MAIL BOXES	EACH	5	175.0	875.0	175.0



Use the drop-down boxes along the top to assign the column names.

Columns that must have names assigned:

- "Section ID" (Required when there is more than one division or project)
- "Section Description" (required for multiple-section projects only)
- "Line Number"
- "Item ID"
- "Quantity"
- "Unit"
- "Unit Price"

DOT File

Projects / 86-C086-060 - 31961 / Items / Import

86-C086-060 - 31961 New  
Gladbrook Bridge Replacement Letting Date: October 21, 2014

Import Items Import Cancel

If no section is specified, import items into a new section or into the default section.

Default Section: \*\* None Selected \*\*  
If no section is specified, import items into a new section or into the default section.

Select number of rows to skip: \*\* None Selected \*\*  
Preview (first 10 out of 61 rows)

Options: ☒ Clear project items before import?

Unassigned Column	Unassigned Column	Section ID	Section Description	Line Number	Item ID	Unassigned Column	Unassigned Column
Proposal	Call Order	Section Number	Section Description	Line	Item	Alternate Code	Item Description
86-C086-060	17	1	ITEMS FOR A 244'-0 X 30'-0 PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE	10	2104-2710020		EXCAVATION, CL/ 10, CHANNEL
86-C086-060	17	1	ITEMS FOR A 244'-0 X 30'-0 PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE	20	2401-6745625		REMOVAL OF EXI BRIDGE
86-C086-060	17	1	ITEMS FOR A 244'-0 X 30'-0 PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE	30	2401-6745650		REMOVAL OF EXI STRUCTURES
ITEMS FOR A 244'-0 X							

Use the scroll bar on the right to scroll down to the bottom. Then use the scroll bar at the bottom to scroll to the right to continue naming columns.

			PRESTRESSED CONCRETE BEAM BRIDGE			BRIDGE
86-C086-060	17	1	ITEMS FOR A 244'-0" X 30'-0" PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE	30	2401-6745650	REMOVAL OF EXISTING STRUCTURES
86-C086-060	17	1	ITEMS FOR A 244'-0" X 30'-0" PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE	40	2402-2720000	EXCAVATION, CLASS 20
86-C086-060	17	1	ITEMS FOR A 244'-0" X 30'-0" PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE	50	2402-2725005	FOUNDATION TREATMENT MATERIAL
86-C086-060	17	1	ITEMS FOR A 244'-0" X 30'-0" PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE	60	2403-0100010	STRUCTURAL CONCRETE (BRIDGE)
86-C086-060	17	1	ITEMS FOR A 244'-0" X 30'-0" PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE	70	2403-0100020	STRUCTURAL CONCRETE (CULVERT)
86-C086-060	17	1	ITEMS FOR A 244'-0" X 30'-0" PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE	80	2404-7775000	REINFORCING STEEL
86-C086-060	17	1	ITEMS FOR A 244'-0" X 30'-0" PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE	90	2407-0563080	BEAMS, PRETENSIONED PRESTRESSED CONCRETE, BTC80

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OVERVIEW

ALL REPORTS

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86-C086-060 - 31961 Now

Gladbrook Bridge Replacement Letting Date: October 21, 2014

Import Items

Default Section

\*\* None Selected \*\*

Select number of rows to skip

\*\* None Selected \*\*

Options

☒ Clear project items before import?

If no section is specified, import items into a new section or into the default section.

Preview (first 10 out of 61 rows)

Assigned Column	Quantity	Unit	Unassigned Column	Unassigned Column	Unit Price	Unassigned Column	Unassigned Column
Description	Quantity	Unit	Vendor Name	Bidder ID	Unit Price	Extension	Deviation
ATION, CLASS ANNEL	5,700.00	CY	PETERSON CONTRACTORS INC.	PE320	\$4.50	\$25,650.00	\$0.00
AL OF EXISTING	1	LS	PETERSON CONTRACTORS INC.	PE320	\$10,700.00	\$10,700.00	\$0.00
AL OF EXISTING TURES	1	LS	PETERSON CONTRACTORS INC.	PE320	\$5,000.00	\$5,000.00	\$0.00
ATION, CLASS 20	602	CY	PETERSON CONTRACTORS INC.	PE320	\$12.15	\$7,314.30	\$0.00

Projects / LFM-2015-01--7X-86 - CSV / Items / Import

### LFM-2015-01--7X-86 - CSV Now

Columbia Stub Resurfacing Letting Date: 10/27/14

#### Import Items

Import Cancel

**Default Section**  
\*\* None Selected \*\*

**Select number of rows to skip**  
\*\* None Selected \*\*

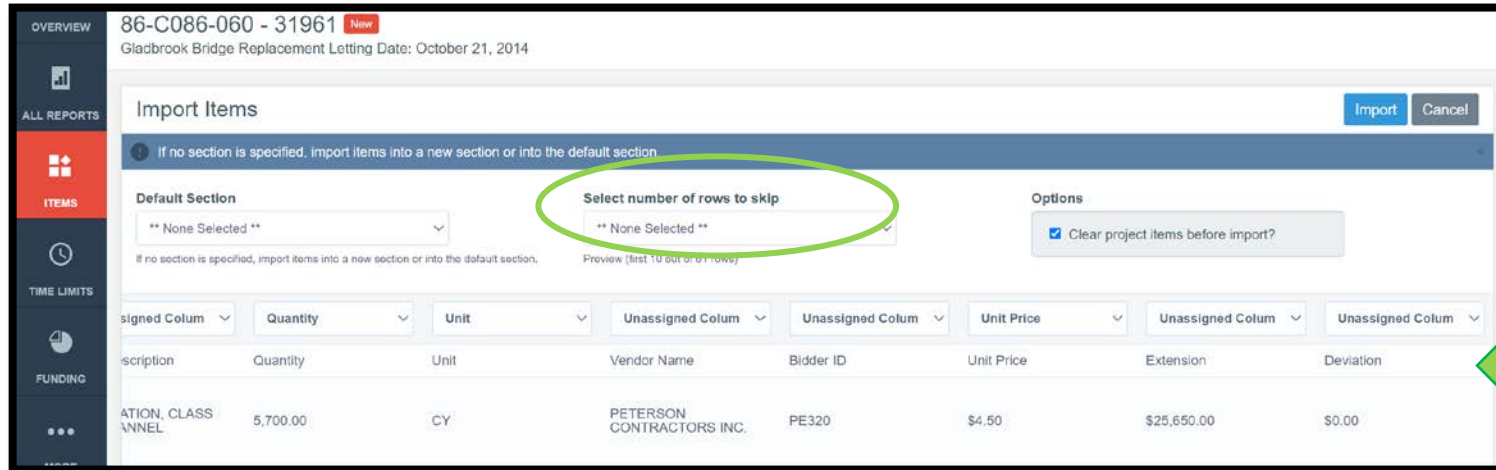
**Options**  
☒ Clear project items before import?

If no section is specified, import items into a new section or into the default section.  
Preview (first 10 out of 24 rows)

Line Number	Item ID	Unassigned Colum	Unit	Quantity	Unit Price	Unassigned Colum	Unassigned Colum
LFM-2015-01--7X-86 Bid Tabulation Tama County Work Type: PCC Overlay (Unbonded) Letting Date: 10/27/2014 09:30 AM							
Tama County							
							Apparent Low Bid
Engineer's Estimate							MANATT'S, INC. 1775 OLD HIGHWAY 6 BROOKLYN, IA 52211- 0535
	Item Number	Description	Units	Quantity	Unit Price	Extended Price	Unit Price
1	2102-0425070	SPECIAL BACKFILL	TON	861.2	35.0	30142.0	21.0
2	2102-2713090	EXCAVATION, CLASS 13, WASTE	CY	607.8	25.0	15195.0	12.0
3	2121-7425020	GRANULAR SHOULDERS, TYPE B	TON	3641.6	25.0	91040.0	18.5
4	2213-7100400	RELOCATION OF MAIL BOXES	EACH	5	175.0	875.0	175.0

After you have named all of the necessary columns, select “5” for ICEA Service Bureau files or select the number of header rows contained in a file generated from another source. This will tell Appia to take out the header line when it imports the items and item information.

## DOT File



86-C086-060 - 31961 New  
Gladbrook Bridge Replacement Letting Date: October 21, 2014

**Import Items** Import Cancel

If no section is specified, import items into a new section or into the default section.

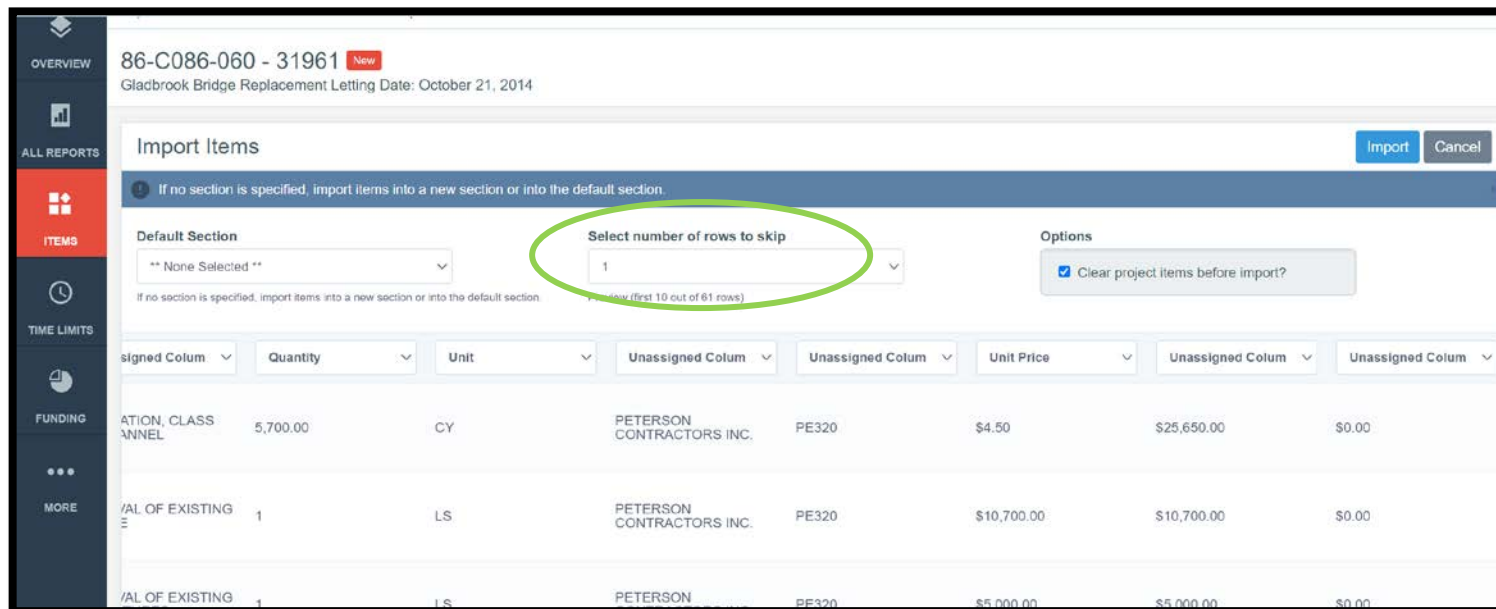
Default Section: \*\* None Selected \*\*

Select number of rows to skip: \*\* None Selected \*\*

Options: ☒ Clear project items before import?

signed Column	Quantity	Unit	Unassigned Column	Unassigned Column	Unit Price	Unassigned Column	Unassigned Column
Description	Quantity	Unit	Vendor Name	Bidder ID	Unit Price	Extension	Deviation
ATION, CLASS NNEL	5,700.00	CY	PETERSON CONTRACTORS INC.	PE320	\$4.50	\$25,650.00	\$0.00

Before



86-C086-060 - 31961 New  
Gladbrook Bridge Replacement Letting Date: October 21, 2014

**Import Items** Import Cancel

If no section is specified, import items into a new section or into the default section.

Default Section: \*\* None Selected \*\*

Select number of rows to skip: 1

Options: ☒ Clear project items before import?

signed Column	Quantity	Unit	Unassigned Column	Unassigned Column	Unit Price	Unassigned Column	Unassigned Column
Description	Quantity	Unit	Vendor Name	Bidder ID	Unit Price	Extension	Deviation
ATION, CLASS NNEL	5,700.00	CY	PETERSON CONTRACTORS INC.	PE320	\$4.50	\$25,650.00	\$0.00
IAL OF EXISTING E	1	LS	PETERSON CONTRACTORS INC.	PE320	\$10,700.00	\$10,700.00	\$0.00
IAL OF EXISTING	1	LS	PETERSON	PE320	\$5,000.00	\$5,000.00	\$0.00

After

## ICEA Service Bureau File

Columbia Stub Resurfacing Letting Date: 10/27/14

### Import Items

Import Cancel

If no section is specified, import items into a new section or into the default section.

Default Section: **\*\* None Selected \*\*** Select number of rows to skip: **\*\* None Selected \*\*** Options: ☒ Clear project items before import?

If no section is specified, import items into a new section or into the default section. Preview (first 10 out of 22 rows)

Line Number	Item ID	Unassigned Column	Unit	Quantity	Unit Price	Unassigned Column
LFM-2015-01--7X-86 Bid Tabulation Tama County Work Type: PCC Overlay (Unbonded) Letting Date: 10/27/2014 09:30 AM						
Tama County						
Apparent Low Bid						
MANATT'S, INC. 1775 OLD HIGHWAY 6 BROOKLYN, IA 52211- 0535						
Item Number	Description	Units	Quantity	Unit Price	Extended Price	
1	2102-0425070	SPECIAL BACKFILL	TON	861.2	21.0	18085.2
2	2102-2713090	EXCAVATION, CLASS 13, WASTE	CY	607.8	12.0	7293.6
3	2121-7425020	GRANULAR	TON	3641.6	18.5	67369.6

Before

Projects / LFM-2015-01--7X-86 - CSV / Items / Import

### Import Items

Import Cancel

If no section is specified, import items into a new section or into the default section.

Default Section: **\*\* None Selected \*\*** Select number of rows to skip: **5** Options: ☒ Clear project items before import?

If no section is specified, import items into a new section or into the default section. Preview (first 10 out of 22 rows)

Line Number	Item ID	Unassigned Column	Unit	Quantity	Unit Price	Unassigned Column
LFM-2015-01--7X-86 - CSV <span>New</span> Columbia Stub Resurfacing Letting Date: 10/27/14						
Advance to Construction Reports						
Item Number	Description	Units	Quantity	Unit Price	Extended Price	
1	2102-0425070	SPECIAL BACKFILL	TON	861.2	21.0	18085.2
2	2102-2713090	EXCAVATION, CLASS 13, WASTE	CY	607.8	12.0	7293.6
3	2121-7425020	GRANULAR SHOULDERS, TYPE B	TON	3641.6	18.5	67369.6

After

You do not need to do anything with the “Default Section” box unless you are only trying to import one section (one project in a tied contract or one division in a multiple-division contract) for some reason. Leave the “Clear project items before import” box checked.

Click “Import”. (It may take a few seconds to process.)

86-C086-060 - 31961 New  
Gladbrook Bridge Replacement Letting Date: October 21, 2014

### Import Items

If no section is specified, import items into a new section or into the default section.

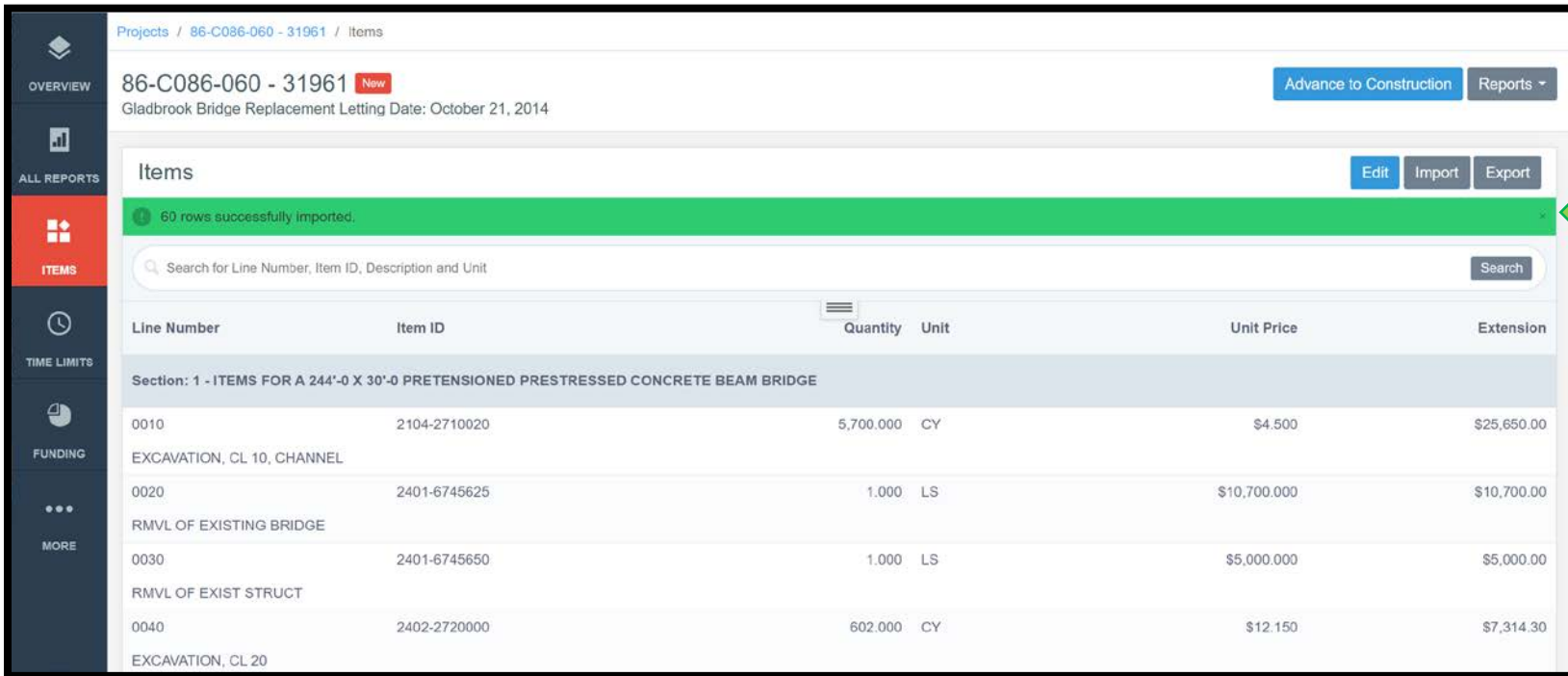
**Default Section**  
\*\* None Selected \*\*  
If no section is specified, import items into a new section or into the default section.

**Select number of rows to skip**  
1  
Preview (first 10 out of 61 rows)

**Options**  
☒ Clear project items before import?

Assigned Column	Quantity	Unit	Unassigned Column	Unassigned Column	Unit Price	Unassigned Column	Unassigned Column
ATION, CLASS ANNEL	5,700.00	CY	PETERSON CONTRACTORS INC.	PE320	\$4.50	\$25,650.00	\$0.00
/AL OF EXISTING	1	LS	PETERSON CONTRACTORS INC.	PE320	\$10,700.00	\$10,700.00	\$0.00
/AL OF EXISTING	1	LS	PETERSON	PE320	\$5,000.00	\$5,000.00	\$0.00

You should get a green banner across the top showing it was a successful import.



Projects / 86-C086-060 - 31961 / Items

86-C086-060 - 31961 New

Gladbrook Bridge Replacement Letting Date: October 21, 2014

Advance to Construction Reports

Items Edit Import Export

60 rows successfully imported.

Search for Line Number, Item ID, Description and Unit Search

Line Number	Item ID	Quantity	Unit	Unit Price	Extension
Section: 1 - ITEMS FOR A 244'-0 X 30'-0 PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE					
0010	2104-2710020	5,700.000	CY	\$4.500	\$25,650.00
EXCAVATION, CL 10, CHANNEL					
0020	2401-6745625	1.000	LS	\$10,700.000	\$10,700.00
RMVL OF EXISTING BRIDGE					
0030	2401-6745650	1.000	LS	\$5,000.000	\$5,000.00
RMVL OF EXIST STRUCT					
0040	2402-2720000	602.000	CY	\$12.150	\$7,314.30
EXCAVATION, CL 20					



If you try importing bid items and get this error message, it means that some of the bid items are not in your reference data library. You will need to add them. The error message tells you what rows of the .csv file are not being imported. This row count includes the header line. Look at your .csv file to figure out which items need to be created. (See the [Reference Data: Bid Items](#) section of this instruction manual.)

The screenshot displays the Appia software interface. On the left is a dark blue sidebar with navigation icons and labels: OVERVIEW, ALL REPORTS, ITEMS (highlighted in red), TIME LIMITS, FUNDING, and MORE. The main content area has a breadcrumb trail: Projects / Winnebago Multiple Sections / Items. Below this, the title 'Winnebago Multiple Sections' is followed by a 'New' tag and the text 'February Letting: 02/18/20'. A red banner with a white error icon and text states: 'Import error: The import couldn't be completed because the following rows contain errors. Please fix the errors and try the import again. Item ID is not a reference item: Rows 5 and 64'. To the right of the banner are 'Edit', 'Import', and 'Export' buttons. Below the banner, a table placeholder is shown with the text 'No items found.' at the bottom. The footer contains contact information: support@appia.net (888) 352-2439, and copyright information: Copyright© 2020 by Info Tech, Inc., DBA Infotech, with links to Terms, Privacy, and DMCA.

## 6 - Creating Bid Items Manually

*Note: If the contract is let through the Iowa DOT, the .json file provided by Local Systems should be used to set up the project, and the instructions in this section need not be used. Contact Doug Heeren if you are in need of a file for a DOT-let project but have not received one.*

The last step before “Advance to Construction” is to add the bid items, quantities, and unit prices to the project.

To do this, select the “Items” button from the left menu.

Projects / Manual Item Entry

## Manual Item Entry New

Letting Date: 06/08/20

[Import Items](#)

### Overview [Edit](#)

General Info	
<b>Created By</b> Nicole Stinn	<b>Work Type</b> BRIDGE REPLACEMENT - CCS
<b>Location</b> Pennsylvania Avenue	
<b>Description</b> Letting Date: 06/08/20	

Important Dates
<b>06/08/2020</b> Date Created

Project Amounts
<b>\$0.00</b> Total

This screen will appear. Click on “Edit” in the top, right corner.

The screenshot displays a web application interface for 'Manual Item Entry'. On the left is a dark sidebar with navigation links: OVERVIEW, ALL REPORTS, ITEMS (highlighted in red), TIME LIMITS, and FUNDING. The main content area has a breadcrumb trail 'Projects / Manual Item Entry / Items' and a title 'Manual Item Entry' with a 'New' button. Below the title is the 'Letting Date: 06/08/20'. The 'Items' section shows a table with three columns and three rows, all of which are empty. Above the table are three buttons: 'Edit' (circled in green), 'Import', and 'Export'. Below the table, the text 'No items found.' is displayed. The footer contains contact information 'support@appia.net (888) 352-2439' and copyright information 'Copyright© 2020 by Info Tech, Inc., DBA Infotech'.

Projects / Manual Item Entry / Items

## Manual Item Entry New

Letting Date: 06/08/20

### Items


No items found.

[Edit](#) [Import](#) [Export](#)

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Click on “Add Items” near the middle of the page on the right side.

Projects / Manual Item Entry / Items / Edit Items

## Manual Item Entry New

Letting Date: 06/08/20

[Import Items](#)

### Items

[Save](#) [Add Section](#) [Cancel](#)

Line Number	Item ID	Quantity	Unit	Unit Price	Extension
Section: 1 - Description					
<a href="#">Add Items</a> <a href="#">Actions</a>					
No items found					
					Total: \$0.00
<a href="#">Save</a> <a href="#">Add Section</a>					

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This pop-up window will appear showing a list of all bid items present in your reference data.

Scroll to the bottom to see the option to view additional pages of items.

Click on the desired item(s). When they have been selected, the number in the green box on the left will change to show how many occurrences of that item you have selected. (Generally, each bid item will only appear once on a contract, but there are occasions where an item may be shown multiple items, such as 2599 items.)

### Add Item(s) to Section

0	2010-108-J-2-a	Removal of Known Box Culvert, ____ (Type), ____ (Size)	LF	<input type="checkbox"/>
0	2010-108-J-2-c	Removal of Known Pipe Culvert, ____ (Type), ____ (Size)	LF	<input type="checkbox"/>
0	2010-108-J-3-a	Removal of Known Pipe and Conduit, ____ (Type), ____ (Size)	LF	<input type="checkbox"/>
0	2010-108-K-1	Filling and Plugging of Known Pipe Culverts, Pipes, and Conduits, ____ (Type), ____ (Size)	LF	<input type="checkbox"/>
0	2010-108-L-0	Compaction Testing	LS	<input type="checkbox"/>
1	2101-0850001	CLEAR+GRUBB	ACRE	<input type="checkbox"/>
0	2101-0850002	CLEAR+GRUBB	UNIT	<input type="checkbox"/>
0	2101-1001000	RMVL OF FLOOD DEBRIS	LS	<input type="checkbox"/>
0	2102-0425046	SELECTED BACKFILL	CY	<input type="checkbox"/>

Displaying items 31 - 60 of 4684 in total

1 Item(s)

Instead of scrolling through the entire listing, you can type part of the desired bid item's name or Item ID into the search box and click "Search". Click "Add Items" when all desired items have been submitted.

Add Item(s) to Section

reinforcing

Search

	Item ID	Description	Unit	
1	2404-7775000	REINFORCING STEEL	LB	×
1	2404-7775005	REINFORCING STEEL, EPOXY COATED	LB	×
0	2404-7775007	REINFORCING STEEL, GALVANIZED	LB	×
0	2404-7775009	REINFORCING STEEL, STAINLESS STEEL	LB	×

Displaying all 4 items

2 Item(s)

Add Items

Cancel

You will be taken back out to the Items screen where the added bid items will be shown. Blank fields will be present in the “Quantity” and “Unit Price” columns. You will need to fill these in with the information from your contract. The extended price will be calculated automatically.

The screenshot shows the 'Manual Item Entry' screen with a sidebar on the left containing navigation options: OVERVIEW, ALL REPORTS, ITEMS (highlighted), TIME LIMITS, FUNDING, and MORE. The main content area has a breadcrumb trail: Projects / Manual Item Entry / Items / Edit Items. The title is 'Manual Item Entry' with a 'New' tag and a 'Letting Date: 06/08/20'. There are buttons for 'Import Items', 'Save', 'Add Section', and 'Cancel' at the top right. Below the title is a section header 'Section: 1 - Description' with 'Add Items' and 'Actions' buttons. The table has columns: Line Number, Item ID, Quantity, Unit, Unit Price, and Extension. Three items are listed: 0010 (2101-0850001) with Quantity 2.340 and Unit Price \$3,750.00; 0020 (2404-7775000) with Quantity 40,000.000 and Unit Price \$1.250; and 0030 (2404-7775005) with blank Quantity and Unit Price fields. The total at the bottom right is \$58,775.00. A green arrow points to the total. The 'Save' button at the bottom is also highlighted with a green circle.

Line Number	Item ID	Quantity	Unit	Unit Price	Extension
0010	2101-0850001	2.340	ACRE	\$3,750.000	\$8,775.00
CLEAR+GRUBB					
0020	2404-7775000	40,000.000	LB	\$1.250	\$50,000.00
REINFORCING STEEL					
0030	2404-7775005		LB		\$0.00
REINFORCING STEEL, EPOXY COATED					

Displaying all 3 items

Total: \$58,775.00

Save Add Section

Review the total contract amount to make sure all entries are correct.

Click “Save” when all information has been entered and checked.



You will be brought back to the Items screen where a green ribbon will display across the top telling you that your items have been added successfully.

The screenshot shows the 'Manual Item Entry' screen in the Appia software. A green notification banner at the top states 'The items have been updated successfully.' The left sidebar contains navigation options: OVERVIEW, ALL REPORTS, ITEMS (highlighted in red), TIME LIMITS, FUNDING, and MORE. The main content area is titled 'Manual Item Entry' with a 'New' tag and a 'Letting Date: 06/08/20'. It includes buttons for 'Advance to Construction' and 'Reports'. Below this is the 'Items' section with 'Edit', 'Import', and 'Export' buttons, and a search bar. A table lists three items under 'Section: 1 - Description'. The table columns are Line Number, Item ID, Quantity, Unit, Unit Price, and Extension. The items are: 0010 CLEAR+GRUBB, 0020 REINFORCING STEEL, and 0030 REINFORCING STEEL, EPOXY COATED. The section total is \$81,775.00 and the project total is \$81,775.00. The footer includes contact information for support@appia.net and copyright information for Info Tech, Inc.

Projects / Manual Item Entry / Items

Manual Item Entry New  
Letting Date: 06/08/20

Advance to Construction Reports

Items

Edit Import Export

Search for Line Number, Item ID, Description and Unit

Line Number	Item ID	Quantity	Unit	Unit Price	Extension
Section: 1 - Description					
0010	2101-0850001	2.340	ACRE	\$3,750.000	\$8,775.00
CLEAR+GRUBB					
0020	2404-7775000	40,000.000	LB	\$1.250	\$50,000.00
REINFORCING STEEL					
0030	2404-7775005	20,000.000	LB	\$1.150	\$23,000.00
REINFORCING STEEL, EPOXY COATED					
Displaying all 3 items					Section Total: \$81,775.00
					Project Total: \$81,775.00

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# 7 - Contracts with Multiple Funding Packages

*Note: If the .json file provided by Local Systems is imported to set up the project, all of the funding package and funding source for the original contract will be set up automatically. Refer to Section [4 - Creating Funding Packages and Sources](#) for guidance on adding/changing funding packages and sources.*

STOP: If your project does not have multiple funding packages or sources as explained in the [Creating Funding Packages and Sources](#) section, skip this section and go to the [Advancing the Project to the "Under Construction" Phase](#) section.

To assign the created funding package to items, go to the “Funding” tab, then click “Edit” in the Items section.

The screenshot displays the 'Funding' and 'Items' sections of a project management application. The left sidebar contains navigation tabs: OVERVIEW, ALL REPORTS, ITEMS, TIME LIMITS, and FUNDING (highlighted with a red circle). The main content area is divided into two sections: 'Funding' and 'Items'.

**Funding Section:** This section shows the 'Contract ID' (New) and 'Letting Date: 02/18/20'. It includes a table with columns 'Fund Source' and 'Fund Package'. The table lists 'FM & STBG' and 'Local' as fund sources. The 'Default Fund Source' is 'FM & STBG' with a value of '\$3,810,625.80' and '100.000%'. The 'Local' fund source has a value of '\$0.00' and '100.000%'. An 'Edit' button is located in the top right corner of this section.

**Items Section:** This section displays a table with columns: Line Number, Item ID, Quantity, Unit, Unit Price, and Extension. The table lists two items: '0010' (GRANULAR SHOULDERS, TYPE B) and '0020' (PAV'T, SCARIFICATION). The '0010' item has a quantity of 447.000 TON and a unit price of \$18.510. The '0020' item has a quantity of 17,677.000 SY and a unit price of \$2.070. An 'Edit' button is located in the top right corner of this section, circled in green.

**Table Data:**

Line Number	Item ID	Quantity	Unit	Unit Price	Extension
0010	2121-7425020	447.000	TON	\$18.510	\$8,273.97
0020	2214-5145150	17,677.000	SY	\$2.070	\$36,591.39

Click on “Assign Fund Package” and select the appropriate package from the drop-down menu. Repeat this procedure for each section.

OVERVIEW

ALL REPORTS

ITEMS

TIME LIMITS

FUNDING

MORE

[Projects](#) / [Contract ID](#) / [Funding](#) / Edit Item Package Splits

Contract ID New

Letting Date: 02/18/20

Advance to Construction

Item Package Splits

In dollars? ☐ NO Save Cancel

Line Number	Item ID	Quantity	Unit	Unit Price	Extension	Fund Package
Section: 1 - LFM-(77)--7X-95 - 12345 (R27)						
0010	2121-7425020	447.000	TON	\$18.510	\$8,273.97	Local
GRANULAR SHOULDERS, TYPE B						
0020	2214-5145150	17,677.000	SY	\$2.070	\$36,591.39	Local
PAV'T, SCARIFICATION						
0030	2303-0003380	1,772.000	TON	\$31.090	\$55,091.48	Local
HOT MIX ASPHALT MIXTURE THIN LIFT SURFACE COURSE, 3/8 IN.						
0040	2303-1264347	144.000	TON	\$646.590	\$93,108.96	Local
ASPH BINDER, PG 64-34E+						

Click "Save" when funding packages have been assigned to all sections.

OVERVIEW

ALL REPORTS

ITEMS

TIME LIMITS

FUNDING

MORE

Projects / Contract ID / Funding / Edit Item Package Splits

Contract ID New

Advance to Construction

Letting Date: 02/18/20

Item Package Splits

In dollars? ☐ NO Save Cancel

Line Number	Item ID	Quantity	Unit	Unit Price	Extension	Fund Package
Section: 1 - LFM-(77)--7X-95 - 12345 (R27)						
0010	2121-7425020	447.000	TON	\$18.510	\$8,273.97	Local
GRANULAR SHOULDERS, TYPE B						
0020	2214-5145150	17,677.000	SY	\$2.070	\$36,591.39	Local
PAV'T, SCARIFICATION						
0030	2303-0003380	1,772.000	TON	\$31.090	\$55,091.48	Local
HOT MIX ASPHALT MIXTURE THIN LIFT SURFACE COURSE, 3/8 IN.						
0040	2303-1264347	144.000	TON	\$646.590	\$93,108.96	Local
ASPH BINDER, PG 64-34E+						

Assign Fund Package

Excludes split items

FM & STBG

Local

Split


## 8 - Contracts with Multiple Projects/Divisions

*Note: If the contract is let through the Iowa DOT, the .json file provided by Local Systems should be used to set up the project, and the instructions in this section need not be used. Contact Doug Heeren if you are in need of a file for a DOT-let project but have not received one.*

There are two ways to rename sections for contracts with multiple projects/divisions.

#### Method 1: Amending the .csv File


If using the .csv bid tab file for import, you will need to change the name in the “Section Description” column. This is how the original file will look.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	Proposal	Call Order	Section Num	Section Description	Line	Item	Alternate C	Item Descri	Quantity	Unit	Vendor Nar	Bidder ID	Unit Price	Extension	Deviation
1	95-C095-07	166	1	Roadway Items - LFM-(77)--7X-95	10	2121-7425020		GRANULAR	447 TON		MATHY CO MA810		\$18.51	\$8,273.97	\$0.00
2	95-C095-07	166	1	Roadway Items - LFM-(77)--7X-95	20	2214-5145150		PAV'T, SCAI	17,677.00 SY		MATHY CO MA810		\$2.07	\$36,591.39	\$0.00
3	95-C095-07	166	1	Roadway Items - LFM-(77)--7X-95	30	2303-0003380		HMA THIN	1,772.00 TON		MATHY CO MA810		\$31.09	\$55,091.48	\$0.00
4	95-C095-07	166	1	Roadway Items - LFM-(77)--7X-95	40	2303-1264347		ASPH BIND	144 TON		MATHY CO MA810		\$646.59	\$93,108.96	\$0.00
5	95-C095-07	166	1	Roadway Items - LFM-(77)--7X-95	50	2303-6911000		HMA PAV'T	1 LS		MATHY CO MA810		\$1,000.00	\$1,000.00	\$0.00
6	95-C095-07	166	1	Roadway Items - LFM-(77)--7X-95	60	2303-9091010		RUMBLE ST	4 EACH		MATHY CO MA810		\$500.00	\$2,000.00	\$0.00
7	95-C095-07	166	1	Roadway Items - LFM-(77)--7X-95	70	2526-8285000		CONSTRUC	1 LS		MATHY CO MA810		\$2,000.00	\$2,000.00	\$0.00
8	95-C095-07	166	1	Roadway Items - LFM-(77)--7X-95	80	2527-9263109		PAINTED P	199 STA		MATHY CO MA810		\$12.00	\$2,388.00	\$0.00
9	95-C095-07	166	1	Roadway Items - LFM-(77)--7X-95	90	2527-9270111		GROOVE C	199 STA		MATHY CO MA810		\$23.00	\$4,577.00	\$0.00
10	95-C095-07	166	1	Roadway Items - LFM-(77)--7X-95	100	2528-8445110		TRAFFIC CC	1 LS		MATHY CO MA810		\$3,300.00	\$3,300.00	\$0.00
11	95-C095-07	166	1	Roadway Items - LFM-(77)--7X-95	110	2528-8445113		FLAGGER	10 EACH		MATHY CO MA810		\$495.00	\$4,950.00	\$0.00
12	95-C095-07	166	1	Roadway Items - LFM-(77)--7X-95	120	2533-4980005		MOBILIZAT	1 LS		MATHY CO MA810		\$15,000.00	\$15,000.00	\$0.00
13	95-C095-07	166	2	Roadway Items - STBG-SWAP-C095(71)--FG-95	130	2121-7425020		GRANULAR	17,276.00 TON		MATHY CO MA810		\$18.51	\$319,778.76	\$0.00
14	95-C095-07	166	2	Roadway Items - STBG-SWAP-C095(71)--FG-95	140	2214-5145150		PAV'T, SCAI	2,441.00 SY		MATHY CO MA810		\$8.18	\$19,967.38	\$0.00
15	95-C095-07	166	2	Roadway Items - STBG-SWAP-C095(71)--FG-95	150	2303-1032500		HMA ST IN	9,650.00 TON		MATHY CO MA810		\$24.25	\$234,012.50	\$0.00
16	95-C095-07	166	2	Roadway Items - STBG-SWAP-C095(71)--FG-95	160	2303-1033500		HMA ST SU	9,580.00 TON		MATHY CO MA810		\$25.52	\$244,481.60	\$0.00
17	95-C095-07	166	2	Roadway Items - STBG-SWAP-C095(71)--FG-95	170	2303-1258283		ASPH BIND	1,201.00 TON		MATHY CO MA810		\$483.54	\$580,731.54	\$0.00
18	95-C095-07	166	2	Roadway Items - STBG-SWAP-C095(71)--FG-95	180	2303-6911000		HMA PAV'T	1 LS		MATHY CO MA810		\$3,000.00	\$3,000.00	\$0.00
19	95-C095-07	166	2	Roadway Items - STBG-SWAP-C095(71)--FG-95	190	2303-9091010		RUMBLE ST	2 EACH		MATHY CO MA810		\$500.00	\$1,000.00	\$0.00
20	95-C095-07	166	2	Roadway Items - STBG-SWAP-C095(71)--FG-95	200	2318-1001100		COLD IN-PL	99,807.00 SY		MATHY CO MA810		\$1.35	\$134,739.45	\$0.00
21	95-C095-07	166	2	Roadway Items - STBG-SWAP-C095(71)--FG-95	210	2318-1001220		ASPH STAB	439 TON		MATHY CO MA810		\$510.93	\$224,298.27	\$0.00
22	95-C095-07	166	2	Roadway Items - STBG-SWAP-C095(71)--FG-95	220	2526-8285000		CONSTRUC	1 LS		MATHY CO MA810		\$2,000.00	\$2,000.00	\$0.00

Change the information in the “Section Description” column to have the following format: “Project Number – Acct ID”. You can add additional identifying information in ( ) after the Acct ID if you so desire. An example is shown below.

\*Do not change the “Section Number” column. If you do, the sections/items will not display in the same order as your contract.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	Proposal	Call Order	Section Num	Section Description	Line	Item	Alternate C	Item Description	Quantity	Unit	Vendor Name	Bidder ID	Unit Price	Extension	Deviation
1	95-C095-07	166	1	LFM-(77)--7X-95 - 12345 (220th St.)	10	2121-7425020		GRANULAR	447 TON		MATHY CO MA810		\$18.51	\$8,273.97	\$0.00
2	95-C095-07	166	1	LFM-(77)--7X-95 - 12345 (220th St.)	20	2214-5145150		PAV'T, SCAI	17,677.00 SY		MATHY CO MA810		\$2.07	\$36,591.39	\$0.00
3	95-C095-07	166	1	LFM-(77)--7X-95 - 12345 (220th St.)	30	2303-0003380		HMA THIN	1,772.00 TON		MATHY CO MA810		\$31.09	\$55,091.48	\$0.00
4	95-C095-07	166	1	LFM-(77)--7X-95 - 12345 (220th St.)	40	2303-1264347		ASPH BIND	144 TON		MATHY CO MA810		\$646.59	\$93,108.96	\$0.00
5	95-C095-07	166	1	LFM-(77)--7X-95 - 12345 (220th St.)	50	2303-6911000		HMA PAV'T	1 LS		MATHY CO MA810		\$1,000.00	\$1,000.00	\$0.00
6	95-C095-07	166	1	LFM-(77)--7X-95 - 12345 (220th St.)	60	2303-9091010		RUMBLE ST	4 EACH		MATHY CO MA810		\$500.00	\$2,000.00	\$0.00
7	95-C095-07	166	1	LFM-(77)--7X-95 - 12345 (220th St.)	70	2526-8285000		CONSTRUC	1 LS		MATHY CO MA810		\$2,000.00	\$2,000.00	\$0.00
8	95-C095-07	166	1	LFM-(77)--7X-95 - 12345 (220th St.)	80	2527-9263109		PAINTED P	199 STA		MATHY CO MA810		\$12.00	\$2,388.00	\$0.00
9	95-C095-07	166	1	LFM-(77)--7X-95 - 12345 (220th St.)	90	2527-9270111		GROOVE CI	199 STA		MATHY CO MA810		\$23.00	\$4,577.00	\$0.00
10	95-C095-07	166	1	LFM-(77)--7X-95 - 12345 (220th St.)	100	2528-8445110		TRAFFIC CC	1 LS		MATHY CO MA810		\$3,300.00	\$3,300.00	\$0.00
11	95-C095-07	166	1	LFM-(77)--7X-95 - 12345 (220th St.)	110	2528-8445113		FLAGGER	10 EACH		MATHY CO MA810		\$495.00	\$4,950.00	\$0.00
12	95-C095-07	166	1	LFM-(77)--7X-95 - 12345 (220th St.)	120	2533-4980005		MOBILIZAT	1 LS		MATHY CO MA810		\$15,000.00	\$15,000.00	\$0.00
13	95-C095-07	166	2	STBG-SWAP-C095(71)--FG-95 - 56789 (D46)	130	2121-7425020		GRANULAR	17,276.00 TON		MATHY CO MA810		\$18.51	\$319,778.76	\$0.00
14	95-C095-07	166	2	STBG-SWAP-C095(71)--FG-95 - 56789 (D46)	140	2214-5145150		PAV'T, SCAI	2,441.00 SY		MATHY CO MA810		\$8.18	\$19,967.38	\$0.00
15	95-C095-07	166	2	STBG-SWAP-C095(71)--FG-95 - 56789 (D46)	150	2303-1032500		HMA ST IN'	9,650.00 TON		MATHY CO MA810		\$24.25	\$234,012.50	\$0.00
16	95-C095-07	166	2	STBG-SWAP-C095(71)--FG-95 - 56789 (D46)	160	2303-1033500		HMA ST SU	9,580.00 TON		MATHY CO MA810		\$25.52	\$244,481.60	\$0.00
17	95-C095-07	166	2	STBG-SWAP-C095(71)--FG-95 - 56789 (D46)	170	2303-1258283		ASPH BIND	1,201.00 TON		MATHY CO MA810		\$483.54	\$580,731.54	\$0.00
18	95-C095-07	166	2	STBG-SWAP-C095(71)--FG-95 - 56789 (D46)	180	2303-6911000		HMA PAV'T	1 LS		MATHY CO MA810		\$3,000.00	\$3,000.00	\$0.00
19	95-C095-07	166	2	STBG-SWAP-C095(71)--FG-95 - 56789 (D46)	190	2303-9091010		RUMBLE ST	2 EACH		MATHY CO MA810		\$500.00	\$1,000.00	\$0.00
20	95-C095-07	166	2	STBG-SWAP-C095(71)--FG-95 - 56789 (D46)	200	2318-1001100		COLD IN-PL	99,807.00 SY		MATHY CO MA810		\$1.35	\$134,739.45	\$0.00

Save the file to the desired location on your computer for importing during project creation and continue as shown in the [Setting Up a Project Using Method 1: "Create Project" via .csv Import](#) section of this instruction manual.



## Method 2: Edit Section Names in Appia

If the .csv file has already been imported, change the section names in Appia. To do this, go to the “Items” tab on the left and then click the “Edit” button on the right.

The screenshot shows the Appia interface for 'Winnebago Multiple Sections'. The left sidebar has the 'ITEMS' tab selected and circled in red. The main area displays a table of items. The 'Edit' button in the top right corner of the table is circled in green.

Line Number	Item ID	Quantity	Unit	Unit Price	Extension
Section: 1 - Description					
0010	2121-7425020	447.000	TON	\$18.510	\$8,273.97

On the line showing the name of the section, click “Actions” and then select “Edit” from the pull-down menu.

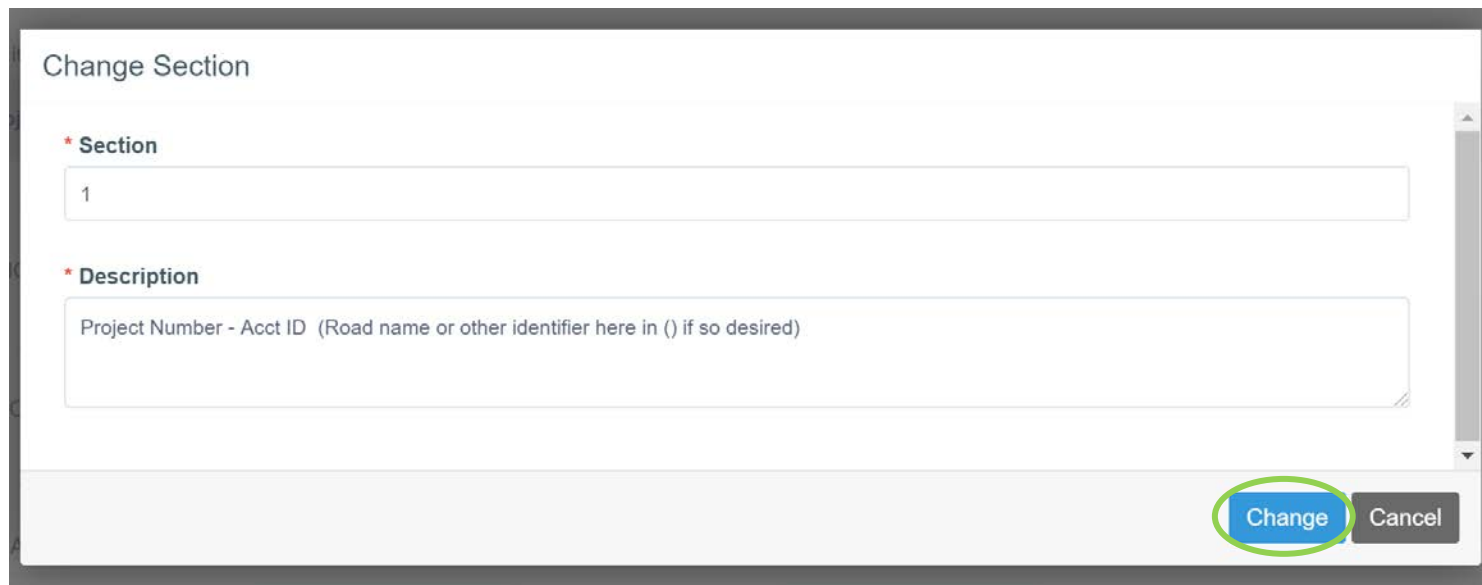
The screenshot shows the Appia interface with the 'Items' table. The 'Actions' dropdown menu for the first item is open, and the 'Edit' option is circled in green. The 'Add Items' button is also circled in green.

Line Number	Item ID	Quantity	Unit	Unit Price	Extension
Section: 1 - Description					
0010	2121-7425020	447.000	TON	\$18.510	\$8,273.97

A box will come up with fields for the Section and Description.

In the “Section” field, leave the number shown. (Sections are displayed in alphabetical/numerical order. Changing this will cause the sections to be displayed in a different order than your contract, which is likely to be confusing.)

In the “Description” field, enter the “Project Number - Accounting ID”. The project number entered here should be the individual project number within the tied contract that pertains to the line items listed in this section. You can add additional information in ( ) after the Acct ID to identify the project for your own purposes. Please use ( ) so it does not run together with the Accounting ID (Ex: 12345 (R27)). Finance needs to identify the section name with Acct ID easily to make payments. Click “Change” when done entering the information.



The screenshot shows a 'Change Section' dialog box. It has two main input fields: 'Section' and 'Description'. The 'Section' field contains the number '1'. The 'Description' field contains the text 'Project Number - Acct ID (Road name or other identifier here in ( ) if so desired)'. At the bottom right of the dialog box, there are two buttons: 'Change' and 'Cancel'. The 'Change' button is highlighted with a green circle.

Scroll down the page and repeat this naming process for each different section in the contract.

The re-named section(s) should look like the image shown below.

Displaying all 15 items

Section: 1 - Project Number - Acct ID (R27)						Add Items	Actions ▾
0010	2121-7425020	447.000	TON	\$18.510	\$8,273.97		✕
GRANULAR SHOULDERS, TYPE B							
0020	2214-5145150	17,677.000	SY	\$2.070	\$36,591.39		✕
PAV'T, SCARIFICATION							
0030	2303-0003380	1,772.000	TON	\$31.090	\$55,091.48		✕

Scroll back up to the top and click “Save” to save the changes to the section names.

Projects / Winnebago Multiple Sections / Items / Edit Items

Winnebago Multiple Sections New

February Letting: 02/18/20

Advance to Construction Reports ▾

Items

Save Add Section Cancel

Line Number	Item ID	Quantity	Unit	Unit Price	Extension	
Section: 2 - Description						
0130	2121-7425020	17,276.000	TON	\$18.510	\$319,778.76	✕
GRANULAR SHOULDERS, TYPE B						
0140	2214-5145150	2,441.000	SY	\$8.180	\$19,967.38	✕

## 9 - Setting Up a Project Using Method 2: “Import Project” via .json Import

There are two options for setting up a project in Appia:

- 1) Creating a Project
- 2) Importing a Project

The screenshot displays the 'My Projects' page in the Appia application. The left sidebar contains navigation links: MY PROJECTS (highlighted in red), REFERENCE DATA, SYSTEM MGT, EXPORT DATA, and HELP. The main content area is titled 'My Projects' and includes a search bar labeled 'Find Project'. Below the search bar, there is a filter for 'Status: Under Construction' and an 'Advanced' filter icon. Two green boxes with numbers 1 and 2 are overlaid on the interface. Box 1 points to the 'Create Project' button, and box 2 points to the 'Import Project' button. Below these buttons, a table lists projects under construction. The table has two columns: 'Project ID' and 'Description'. Each row includes a star icon, a project ID, an 'Imported' status label, a description, and a plus icon in a blue box.

Project ID	Description
03-C003-062 Imported	03-C003-062
11-C011-071 Imported	STP-S-C011(71)--5E-11 - 29427
36-C036-074 JSON TEST/FINANCE Imported	
BHM-SWAP-1827(684)--SA-82-1 12345	Reconstruction Bridge Deck
BROS-C004(103)--8J-04 - 35155	On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.
BROS-C078(111)--FF-78_Payment for Multiple Sections	Letting Date 4/21/2020
BRS-C036(74)--60-36 - AcctID	Letting Date: 04/01/20

## **Method #2 – Importing a project**

This method is used when importing a .json file that contains all of the contract information.

The .json file for DOT-let projects can be obtained from Doug Heeren. Please send requests to Doug at [Douglas.Heeren@iowdot.us](mailto:Douglas.Heeren@iowdot.us). Requests should include the Contract ID Number and letting date. Please note, .json files are available as soon as the Contracts Bureau has acknowledged that the contract has been awarded. The .json files will be uploaded to Doc Express in the Contract Documents drawer. (Note: When downloading a .json file that is attached to an email, your computer may force you to choose an application to open the file with. Use Notepad to open it, and then save the file from there. Alternately, you can open the “Downloads” folder in your file explorer and retrieve the file from there.)

The .json file for projects let using the ICEA Service Bureau’s “Local Letting Toolkit” can be exported from that program and can be used immediately. The .json file can be generated by clicking on the “Appia Export” button as shown below.

**Projects** | Contractors | Bid Items | Officials | Welcome | L-2013-01--73-86 x

Search [ ] x [Add Project] [Import From TPMS]

**This project has been Closed. Changes are no longer allowed.**

[Appia Export] [Remove Project]

Letting...	Project Nu...	Name	Bid...	Sta...
4/6/2020	L-2020-01--73-86	Bridge 09041 Materials	Formal	Active
9/16/2016	L-2017-01--73-86	Columbia 31 Bridge Materi...	Formal	Closed
10/27/2014	LFM-2015-01--7...	Columbia Stub Resurfacing	Formal	Closed
8/25/2014	L-2015-02--73-86	Buckingham Pavement	Formal	Closed
4/16/2013	L-2013-01--73-86	T47 / E29 / UGL Resurfacing	Formal	Closed
	L-10342--73-86	Bridge 10342	Formal	Cancelled

Setup	Date	Action	Initiator	Message
Bid Items	8/8/2014 08:21 am	Closed Project	Nicole Stinn	New Value: Project Closed Old Value: Project Active
Requirements	4/29/2013 08:38 am	Locked Award of Contract	Nicole Stinn	Old Value: UnLocked New Value: Locked
Notice To Bidders	4/29/2013 08:37 am	Edited/created Form of Contract	Nicole Stinn	Old Value: This Agrmnt: THIS AGREEMENT made and entered by and between [CountyName_] County, Iowa, by its Board of Supervisors consisting of: [CountyBoardMembers_] Contracting Authority, and [ContractorName_] of, [ContractorCity_] [ContractorState_] [ContractorZipCode_] Contractor. New Value: This Agrmnt: THIS AGREEMENT made and entered by and between TAMA County, Iowa, by its Board of Supervisors consisting of: Kendall Jordan, Chairperson, Dan Anderson and Larry Vest, Contracting Authority, and Manatts, Inc. of, Newton, IA 50208, Contractor.
DOT/AGC Notice	4/29/2013 08:37 am	Edited/created Form of Contract	Nicole Stinn	Old Value: Witenstheth: WITNESSETH: That the contractor, for and in consideration of [ContractAmountText_] ([ContractAmtNumeric_]) payable as set forth in the specifications constituting a part of this contract, hereby agrees to construct in accordance with the plans and specification

Proposal [ ]  
Plan Holders [✓]  
Documents [✓]  
Addendums [ ]  
Bids [✓]  
Contract [✓]  
Award [✓]  
Log

Before importing your setup file, please be sure you have completed the following tasks.

- Remove the Lump Sum designation for all Lump Sum items in the contract. See the [Removing "Lump Sum" Designations](#) section of this manual for further guidance on how to do this.
- Change Order Custom Fields. See the [Reference Data: Lists > B. Editing Lists](#) of this manual for further guidance on how to do this.
- Select correct project payment settings. See the [Default Settings: Project Settings](#) section of this manual for further guidance on how to do this.
- For projects administered by Local Systems, ensure you have added your Local Systems Field Engineer, Field Technician, Secondary Roads Engineer, and E-Construction Administrator as users with Read-Only access. For projects administered by Systems Planning, ensure you have added your Grant Manager as a user with Read-Only access. See the [Default Settings: Users - Adding/Deleting, Roles, Project Access, Licenses](#) section of this manual for further guidance on how to do this.

Once you have completed the tasks above and have obtained and saved the .json file, click on the "Import Project" button.

The screenshot shows a web application interface for managing projects. On the left is a dark sidebar with navigation icons and labels: 'MY PROJECTS' (red), 'REFERENCE DATA' (book icon), 'SYSTEM MGT' (gear icon), 'EXPORT DATA' (upload icon), and 'HELP' (question mark icon). The main content area is titled 'My Projects' and includes a search bar labeled 'Find Project', a status filter set to 'Under Construction', and an 'Advanced' view toggle. Two buttons, 'Create Project' and 'Import Project', are in the top right; the 'Import Project' button is highlighted with a green circle. Below these is a table titled 'Under Construction' with columns 'Project ID' and 'Description'. The table lists six projects, each with a star icon on the left and a download icon on the right. The first three projects have a yellow 'Imported' tag.

Project ID	Description
03-C003-062 Imported	03-C003-062
11-C011-071 Imported	STP-S-C011(71)--5E-11 - 29427
36-C036-074 JSON TEST/FINANCE Imported	
BHM-SWAP-1827(684)--SA-82-1 12345	Reconstruction Bridge Deck
BROS-C004(103)--8J-04 - 35155	On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.
BROS-C078(111)--FF-78_Payment for Multiple Sections	Letting Date 4/21/2020

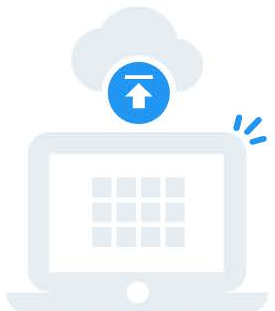
This window will appear. Click on the “Select file” button and browse to select the .json file you have saved on your computer.



### Import Project File

Project files must be in JSON format in order to be imported. Use the example file below to follow the JSON file structure.

Download the [sample project file](#).



Select a Project File

project.json

Select File

Import

Cancel

Click on the “Import” button once you have chosen the appropriate file.

If the import was successful, you will see a green ribbon across the top of the project list indicating the successful import, and your project should appear in the project listing with a yellow “Imported” tag.

The screenshot displays the 'My Projects' interface. A green notification banner at the top of the project list states: 'The project has been imported. You can't change this project until it is advanced to construction.' Below this, a table lists several projects, each with a yellow 'Imported' tag. The table has columns for 'Project ID' and 'Description'. The projects listed are:

Project ID	Description
06-C006-113	06-C006-113
19-CO19-19-	IETTING dATE
36-C036-074 JSON TEST1	170221 031 TMC
36-C036-074 JSON TEST2	170221 031 TMC
36-C036-077	FM-C036(77)--55-36 - 35405
82-1827-677-3 34463	where is the
BHM-SWAP-1827(684)--SA-82 12345	Reconstruction - Bridge Deck Replacement
BROS-BR6061	

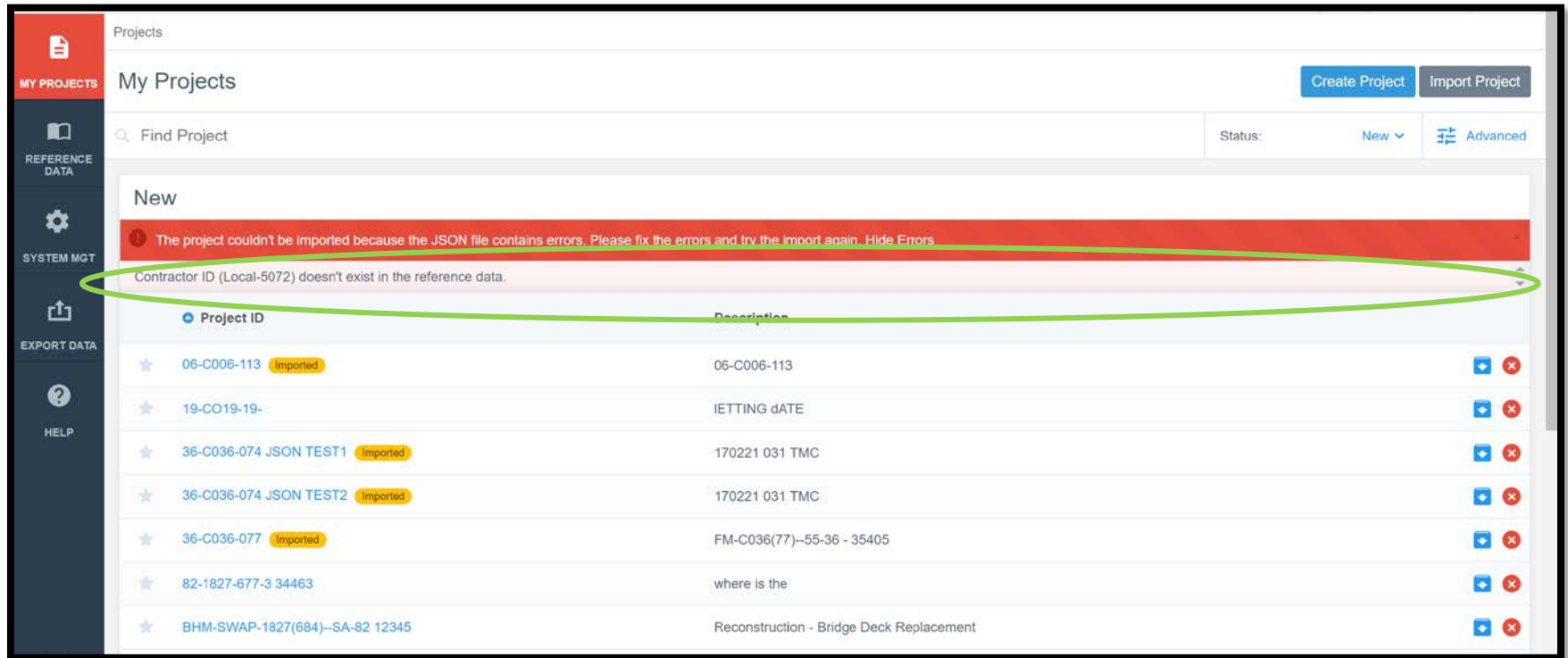
The interface also includes a sidebar with navigation options: MY PROJECTS, REFERENCE DATA, SYSTEM MGT, EXPORT DATA, and HELP. At the top right, there are buttons for 'Create Project' and 'Import Project', and a status filter set to 'New'.

If the import was not successful, you will see a red ribbon across the top saying there is an error. If this happens, click on “Show Errors” within the ribbon message.

The screenshot displays the 'My Projects' page in a web application. A red error banner at the top states: 'The project couldn't be imported because the JSON file contains errors. Please fix the errors and try the import again. [Show Errors](#)'. A green oval highlights this banner and the 'Show Errors' link. Below the banner is a table with columns 'Project ID' and 'Description'. The table lists several projects, some marked as 'Imported' with a yellow tag. The left sidebar contains navigation links: MY PROJECTS, REFERENCE DATA, SYSTEM MGT, EXPORT DATA, and HELP. The top right has buttons for 'Create Project' and 'Import Project', and a status filter set to 'New'.

Project ID	Description
06-C005-113	06-C006-113
19-CO19-19-	IETTING dATE
36-C036-074 JSON TEST1	170221 031 TMC
36-C036-074 JSON TEST2	170221 031 TMC
36-C036-077	FM-C036(77)--55-36 - 35405
82-1827-677-3 34463	where is the
BHM-SWAP-1827(684)--SA-82 12345	Reconstruction - Bridge Deck Replacement

A lighter red ribbon will show below the red error message ribbon listing the errors present.



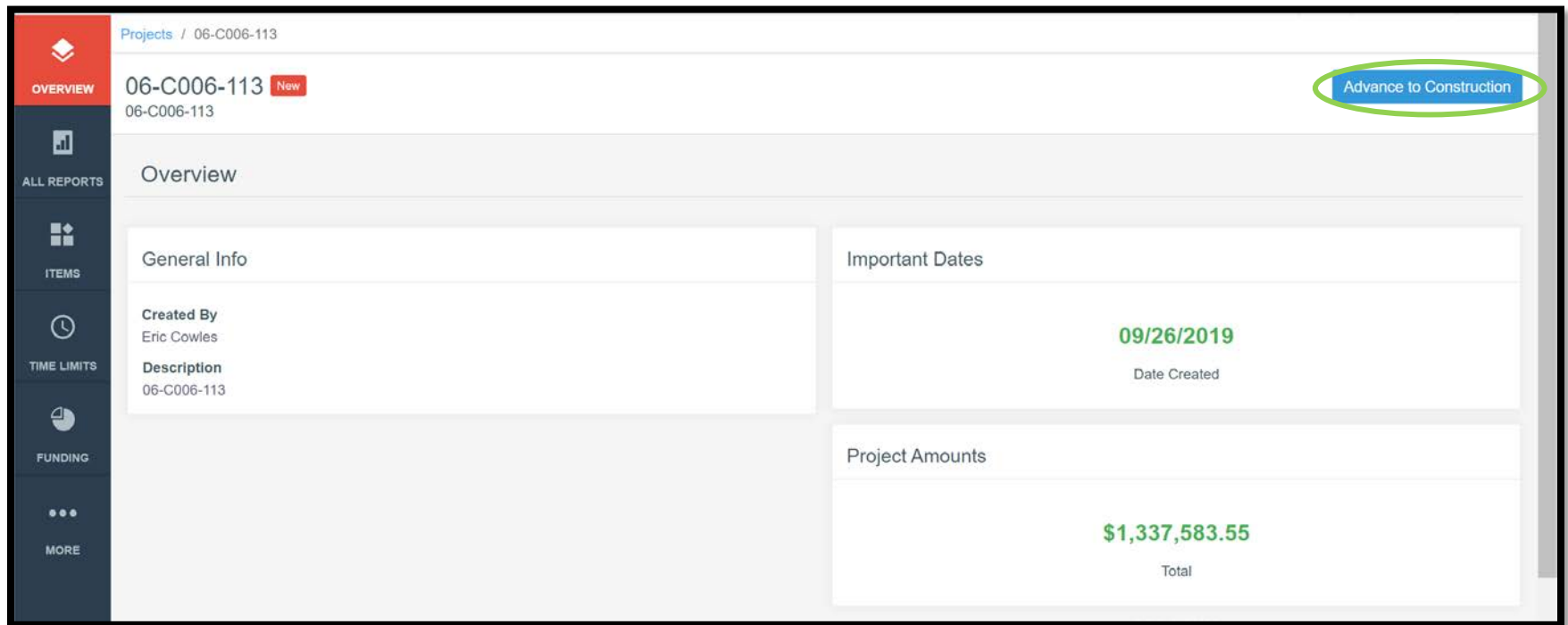
The screenshot shows the 'My Projects' page in a web application. At the top, there's a search bar labeled 'Find Project' and buttons for 'Create Project' and 'Import Project'. Below this, a 'New' section displays a red error message: 'The project couldn't be imported because the .JSON file contains errors. Please fix the errors and try the import again. Hide Errors'. A green oval highlights a lighter red ribbon below the error message that contains the text: 'Contractor ID (Local-5072) doesn't exist in the reference data.' Below the error message is a table with columns 'Project ID' and 'Description'. The table lists several projects, some marked as 'Imported' with a yellow tag. Each row has a star icon on the left and a blue plus icon and a red minus icon on the right.

Project ID	Description
06-C006-113	06-C006-113
19-CO19-19-	IETTING dATE
36-C036-074 JSON TEST1	170221 031 TMC
36-C036-074 JSON TEST2	170221 031 TMC
36-C036-077	FM-C036(77)--55-36 - 35405
82-1827-677-3 34463	where is the
BHM-SWAP-1827(684)--SA-82 12345	Reconstruction - Bridge Deck Replacement

If the error shows that something doesn't exist in the reference data, first, determine if the information in the .json file is correct. If so, you will need to add the lacking information to your reference data. See the applicable Reference Data section of this instruction manual. If the information in the .json file does not appear to be correct, contact [Doug Heeren](mailto:Doug.Heeren@iowadot.us) at [Doug.Heeren@iowadot.us](mailto:Doug.Heeren@iowadot.us).

You will not be able to edit the information in the .json file that is imported. You will, however, still be able to edit your project settings and users. Be sure to click through the tabs to make sure all of the data appears to be correct before advancing to construction.

When you are sure all of the data imported is correct, click on the “Advance to Construction” button in the upper, right corner of the screen.



Continue with the [Advancing the Project to the “Under Construction” Phase](#) section of this instruction manual.

\*\*\*Special notes regarding .json files:

- Files Obtained from the DOT - When you receive your .json files for a DOT-let project, a few items will have been amended in it.
  - Liquidated Damages: A value of \$0.00 will show in the “Liquidated Damages” field on the Time Limits tab.
    - This is because Appia will automatically calculate liquidated damages if the contract time limits are exceeded and will deduct them from the amount to be paid on a voucher. This is NOT how liquidated damages are processed for projects using Iowa DOT specs. Rather, the DOT requires liquidated damages to be added as a separate line item to the contract via change order. Therefore, the user will need to add a change order to accomplish the charging of liquidated damages if the situation warrants that price adjustment.
  - Late Start Date & Liquidated Damages: The project’s late start date (for a working day contract) and the liquidated damages amount have been written into the “Description” field on the Time Limits tab.
  - Letting Date: The project’s letting date has been written into the “Description” field on the Overview tab.
  - Section Descriptions: If multiple projects are present on the contract, the section descriptions will be renamed to show the “Project Number – Acct ID”.
  - Additional Information: With the additions shown above, it should not be necessary for the user to make any changes to the .json file or the information as it’s been imported into Appia. However, it’s certainly permissible for the user to add additional information into the “Description” section on the “Advance to Construction” screen if they so desire.
- Files Obtained from the Service Bureau - It will be necessary to amend the .json file downloaded from the Service Bureau to change the liquidated damages value to \$0.00 as described in the DOT files section above. It is also suggested that the file be amended to include the late start date, liquidated damage value description, and the letting date as described above.

Time Limits		
Description	Liquidated Damages per Day	Deadline
Primary Working Days, Late Start Date: 06/28/2021 Liquidated Damages: \$1,500.00/day	\$0.00	85.0 Working Days

General Info	
Created By Nicole Stinn	Location On G50 from P71 East 11 Miles to WCL St. Charles
Description FM-C061(117)--55-61 - 37007 Letting Date: July 21, 2020	

# 10 - Advancing the Project to the “Under Construction” Phase

**STOP! – For any project administered by the Iowa DOT, a project set-up review must be requested prior to Advancing to Construction. Send a request to the Local Systems [E-Construction Administrator](#) for this review. Do NOT advance the project to construction until you have received the E-Construction Administrator’s approval to do so.**

Advancing a project to the “Under Construction” phase signals the end of the project set-up. Once transitioned to “Under Construction”, a user can document the construction of the project and generate reports for project administration. Once a project is “Advanced to Construction”, the action CANNOT be undone, and many project settings cannot be changed.

Some examples of non-revisable details/settings include:

- the prime contractor (shown later in this section) and
- the Notice to Proceed date.

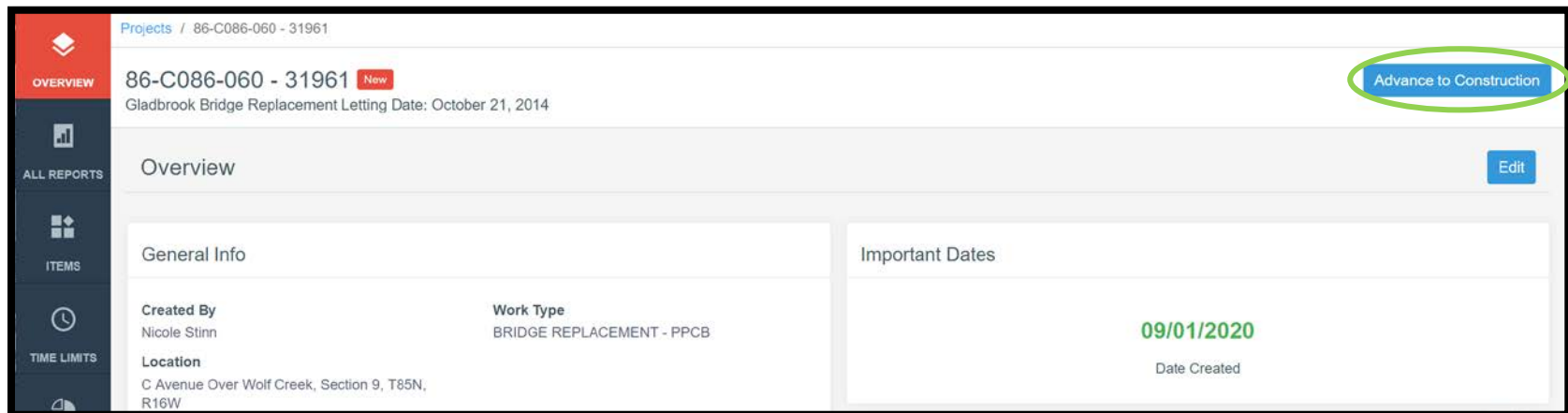
Some settings can only be revised via change order after a project is “Advanced to Construction”. Examples of these settings include:

- time limits and
- funding packages/sources.

In order to transition to the “Under Construction” phase, click on the “Advance to Construction” button.

This button can be found in the top, right corner of almost any screen after the project’s bid items have been imported.

DO NOT hit the “Advance to Construction” button until you are sure the project is set up the way you want it. Important things to double check include time limits, funding sources, names of sections for multiple project/multiple division contracts, and payment settings.





The following screen will appear. Enter the information as follows:

- Notice to Proceed Date: This is the first date on which construction could legally begin. NO diary entries, quantities (item postings), or time charges may be entered prior to this date.
  - Recommended date = DATE OF FULL CONTRACT EXECUTION
    - The date entered here may cause errors in making automated payments if it is not entered correctly.
- Project Manager: Enter the name of the project manager if known (not required). This may be the County Engineer, the City Public Works Director, or the consulting firm acting as the construction engineer
- Work Type: This should match the work type shown on the contract and should be auto-populated from information you entered in the overview screen when first creating the project.
- Description: This should at least contain the letting date but can contain whatever other information is helpful to you.
  - If you created the project using a .csv file, this information should be auto-populated from information you entered in the overview screen when first creating the project.
  - If you created the project using a .json file from the DOT, **the letting date has been included for you in this description field. You can also add whatever other information you feel is helpful to you, such as the project number.**
  - If you created the project using a .json file from the Service Bureau, **you will either need to make sure you amend the .json file to contain the letting date, or you must include the letting date in this description field. You can also add whatever other information you feel is helpful to you, such as the project number.**
- Project Location: This should match the location description shown on the contract.
  - If you created the project using a .csv file, this information should be auto-populated from information you entered in the overview screen when first creating the project.
  - If you created the project using a .json file.
- Construction Start Date: If construction has commenced, enter the date (not required).
- Managing Office: Enter the name of the managing office if known (not required). This would generally be the county secondary roads department or the city public works department.
- Prime Contractor: Select the name of the prime contractor, as shown on the contract, from the pull-down menu. The user may begin typing the name of the contractor to jump down in the pull-down list (i.e. type in “Man” and it will jump to Manatt’s Inc.). If the contractor is not available in the list, either the list needs to be updated or the contractor is not on the DOT-approved list. The user may add locally qualified contractors into their own reference data as shown in the Reference Data: Contractors section of this instruction manual, if desired.
  - The prime contractor CANNOT be changed after the project is advanced to construction. Double check to make sure you have the correct prime contractor selected.

- **Project Settings:** Check the boxes next to the three settings if they are correct. If not, go back to the project settings and correct them. When all of the necessary information has been entered and **double checked**, click on the “Execute” button in the upper, right corner.

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

Projects / 06-C006-119 / Advance to Construction

06-C006-119 New  
BROS-SWAP-C006(119)--SE-06, Acct ID- 38549, Letting Date- April 19, 2022

### Advance Project To Construction

**Execute** **Cancel**

**\* Notice To Proceed Date**  
06/01/2022

**Project Manager**  
Niki Stinn

**Work Type**  
RCB CULVERT NEW - TWIN BOX

**Description**  
14px B I U   
BROS-SWAP-C006(119)--SE-06, Acct ID- 38549,  
Letting Date- April 19, 2022

**Construction Start Date**

**Managing Office**  
Local Systems

**\* Prime Contractor**  
IOWA BRIDGE & CULVERT, L.C.

**\* Please confirm the following project settings.**

- ☒ Retainage will be at \$30,000.00.
- ☒ Payment will be made up to \$50,000.00 over an item's authorized amount.
- ☒ The Awarded Amount is \$259,701.60.

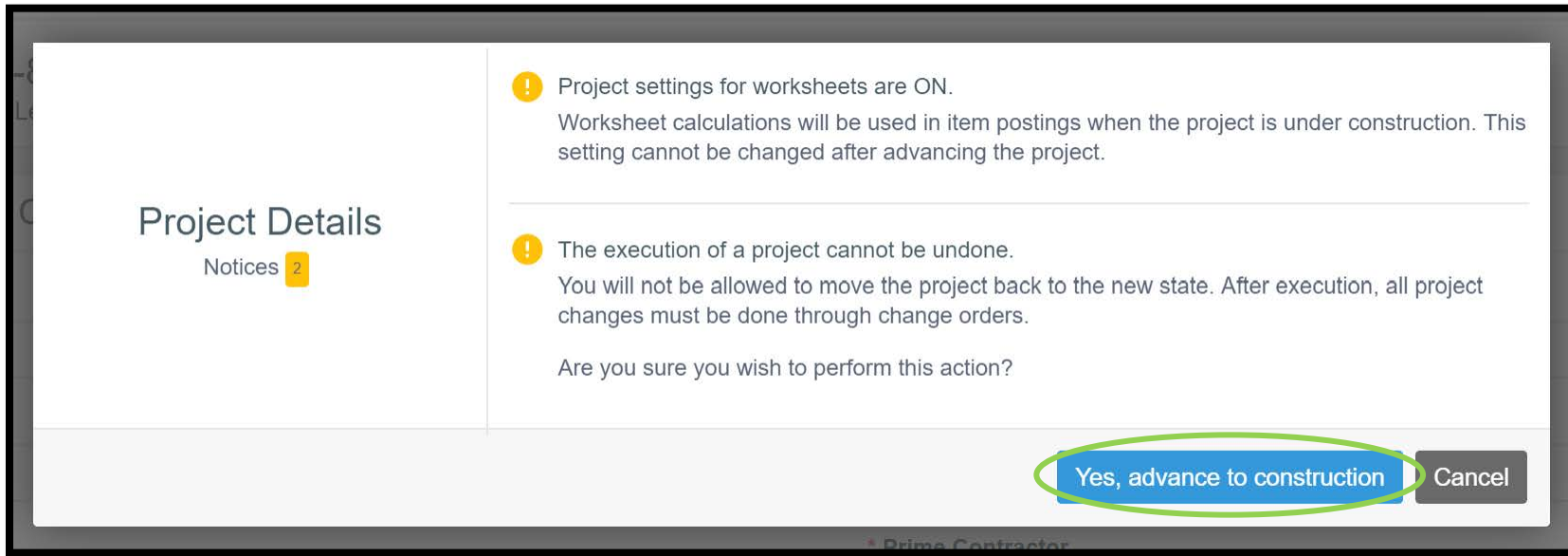
**Project Location**

**Location**  
On 75 ST, Over BR PRAIRIE CK, S10 T82 R09  
Use a physical location, like: 4 miles south of southbound on-ramp

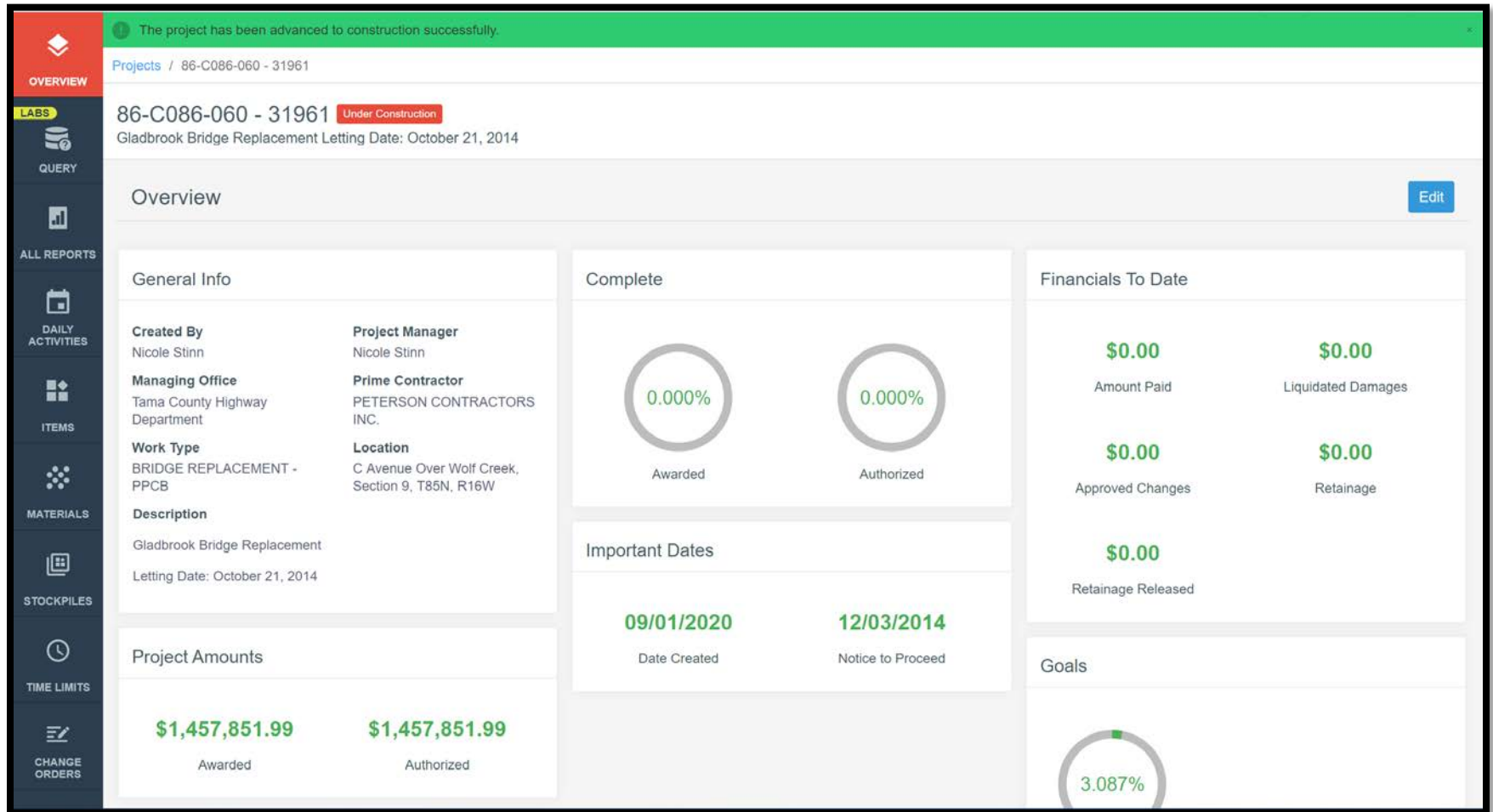
**Coordinates**

**Help**

The following pop-up window will appear. Double check the notices and click “Yes, advance to construction”.



The following screen should appear.



Congratulations! You are now in the “Under Construction” phase and can track construction progress.

# 11 - Default Settings: Users – Adding/Deleting, Roles, Project Access, Licenses

(System Administrator access level required.)

Default settings will be those that are applied to any project that is created. Many settings can be tweaked on a project-by-project basis, but you will want to set up the defaults to the most commonly used settings. To do so, click on the “System Management” tab in the left menu of the My Projects screen.

To edit the users in your Appia account, click on “My Business” in the expanded menu.

Projects

## My Projects

Find Project

Create Project Import Project

Status: Under Construction Advanced

**Under Construction**

**Pro tip:**  
Click or tap the star to add a project to your favorite projects. My Projects will default to Favorites at next login if a favorite is selected.  
[Dismiss](#)

	Description	
★ 03-C003-062		+
★ STP-S-C011(71)--5E-11 - 29427		+
★ 36-C036-074 JSON TEST/FINANCE Imported		+
★ BHM-SWAP-1827(684)--SA-82-1 12345	Reconstruction Bridge Deck	+
★ BROS-C004(103)--8J-04 - 35155	On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.	+
★ BROS-C078(111)--FF-78_Payment for Multiple Sections	Letting Date 4/21/2020	+
★ BROS-C086(60)--8J-86 - 31961	Gladbrook Bridge Replacement Letting Date: October 21, 2014	+
★ BRS-C036(74)--60-36 - AcctID	Letting Date: 04/01/20	+
★ BRS-C036(74)--60-36 - AcctID_02_Central01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	+
★ BRS-C036(74)--60-36 - AcctID_03_West01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	+
★ BRS-C036(74)--60-36 - AcctID_05_West02	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	+

A list of the users present in your Appia account will show.

New users are set to read-only access (unlicensed) by default and do not require a paid license.

Users

Manage licenses
Add Users

You cannot remove users with devices.

Name	Email	Default Role	Projects	API Access	
Unlicensed users 1					
Nicole Moore <small>Iowa Local Systems _DEMO ACCOUNT</small>	nicole.moore@iowadot.us	Reviewer	15	<input type="checkbox"/> OFF	Devices
License set 001 7 of 50 used Expires 06/24/2100 <span>Active</span>					
Douglas Heeren <small>Iowa Local Systems _DEMO ACCOUNT</small>	douglas.heeren@iowadot.us	System Administrator	ALL	<input type="checkbox"/> OFF	Devices
Jennifer Basener <small>Infotech Iowa Agency</small>	jennifer.basener+testinstance@infotechfi.com	Senior Project Manager	426	<input type="checkbox"/> OFF	Devices
Nicole Stinn <small>Iowa Local Systems _DEMO ACCOUNT</small>	niki.stinn@iowadot.us	System Administrator	ALL	<input type="checkbox"/> OFF	Devices
Sophy Yang <small>Iowa Local Systems _DEMO ACCOUNT</small>	sophy.yang@iowadot.us	System Administrator	ALL	<input type="checkbox"/> OFF	Devices
Theodore Katseres <small>Iowa DOT</small>	theodore.katseres@iowadot.us	System Administrator	ALL	<input type="checkbox"/> OFF	Devices
Troy Strum <small>Iowa Local Systems _DEMO ACCOUNT</small>	troy.strum@iowadot.us	System Administrator	ALL	<input type="checkbox"/> OFF	Devices

The following Local Systems Bureau and/or Systems Planning Bureau staff needs to be added to your default/global user list. See the [Local Systems Contact Us website](#) or the [Systems Planning Staff > Grant Programs website](#) for bureau personnel.

- The appropriate regional Field Engineer (Local Systems projects)
- The appropriate regional Field Technician (Local Systems projects)
- The Grant Manager (Systems Planning projects)
- The Secondary Roads Engineer (All projects)
- The e-Construction Administrator (All projects)
- CPS Contractor Pay Finance – For county projects on the Farm-to-Market System let on or after January 2024
  - The API Access must be toggled on for this user. See the [Managing API Access](#) subsection for guidance.

## A. Deleting a User

To delete a user, click on the three vertical dots on the right side of the line containing the user's name. Then click on "Remove user..." in the box that appears.

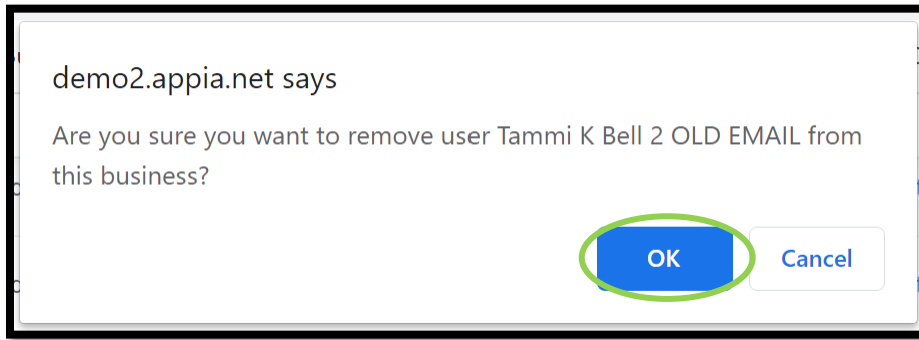
The screenshot shows a 'Users' management interface. At the top, there's a blue header with a message: 'New users are set to read-only access (unlicensed) by default and do not require a paid license.' Below this, there's a 'Users' section with a sub-header 'Select the user options menu to remove or change license sets'. On the right, there are buttons for 'Manage licenses' and 'Add Users'. A blue banner below the header states: 'You cannot remove users with devices.' The main table lists users with columns: Name, Email, Default Role, Projects, API Access, and a three-dot menu. The users are grouped into 'Unlicensed users' (1) and 'License set 001' (7 of 50 used). The user 'Sophie Yang' is highlighted with a green circle around her three-dot menu.

Name	Email	Default Role	Projects	API Access	
<b>Unlicensed users</b> 1					
NM Nicole Moore iowa Local Systems_DEMO ACCOUNT	nicole.moore@iowadot.us	Reviewer	15	OFF	Devices
<b>License set 001</b> 7 of 50 used Expires 06/24/2100 Active					
DH Douglas Heeren iowa Local Systems_DEMO ACCOUNT	douglas.heeren@iowadot.us	System Administrator	ALL	OFF	Devices
JB Jennifer Basener Infotech Iowa Agency	jennifer.basener+testinstance@infotechfl.com	Senior Project Manager	426	OFF	Devices
NS Nicole Stinn iowa Local Systems_DEMO ACCOUNT	niki.stinn@iowadot.us	System Administrator	ALL	OFF	Devices
SY Sophie Yang iowa Local Systems_DEMO ACCOUNT	sophy.yang@iowadot.us	System Administrator	ALL	OFF	Devices
TK Theodore Katseres iowa DOT	theodore.katseres@iowadot.us	System Administrator	ALL	OFF	Devices
TS Troy Strum iowa Local Systems_DEMO ACCOUNT	troy.strum@iowadot.us	System Administrator	ALL	OFF	Devices

The screenshot shows a dropdown menu with three options: 'Change role', 'Move to another license', and 'Remove user...'. The 'Remove user...' option is highlighted with a green circle.



A pop-up window will appear asking if you are sure you want to delete the user. Click “ok”.



## B. Adding a User

To add a user, click “Add Users” in the upper, right corner.

New users are set to read-only access (unlicensed) by default and do not require a paid license.

Users

Manage licenses ▾

Add Users

You cannot remove users with devices.

Name	Email	Default Role	Projects	API Access	
Unlicensed users 1					
NM Nicole Moore <small>Iowa Local Systems _DEMO ACCOUNT</small>	nicole.moore@iowadot.us	Reviewer	15	<input type="checkbox"/> OFF	Devices ⋮
License set 001 7 of 50 used Expires 06/24/2100 ● Active					
DH Douglas Heeren <small>Iowa Local Systems _DEMO ACCOUNT</small>	douglas.heeren@iowadot.us	System Administrator	ALL	<input type="checkbox"/> OFF	Devices ⋮
JB Jennifer Basener <small>Infotech Iowa Agency</small>	jennifer.basener+testinstance@infotechfl.com	Senior Project Manager	426	<input type="checkbox"/> OFF	Devices ⋮
NS Nicole Stinn <small>Iowa Local Systems _DEMO ACCOUNT</small>	niki.stinn@iowadot.us	System Administrator	ALL	<input type="checkbox"/> OFF	Devices ⋮
SY Sophy Yang <small>Iowa Local Systems _DEMO ACCOUNT</small>	sophy.yang@iowadot.us	System Administrator	ALL	<input type="checkbox"/> OFF	Devices ⋮
TK Theodore Katseres <small>Iowa DOT</small>	theodore.katseres@iowadot.us	System Administrator	ALL	<input type="checkbox"/> OFF	Devices ⋮
TS Troy Strum <small>Iowa Local Systems _DEMO ACCOUNT</small>	troy.strum@iowadot.us	System Administrator	ALL	<input type="checkbox"/> OFF	Devices ⋮

Type the name of the user you are adding into the search box and click “Search”. The names of anyone with an Infotech account matching the searched description will appear. Click on the line containing the desired user’s name. A green circle with a check mark will appear on the right. Click “Add” in the lower, right corner.

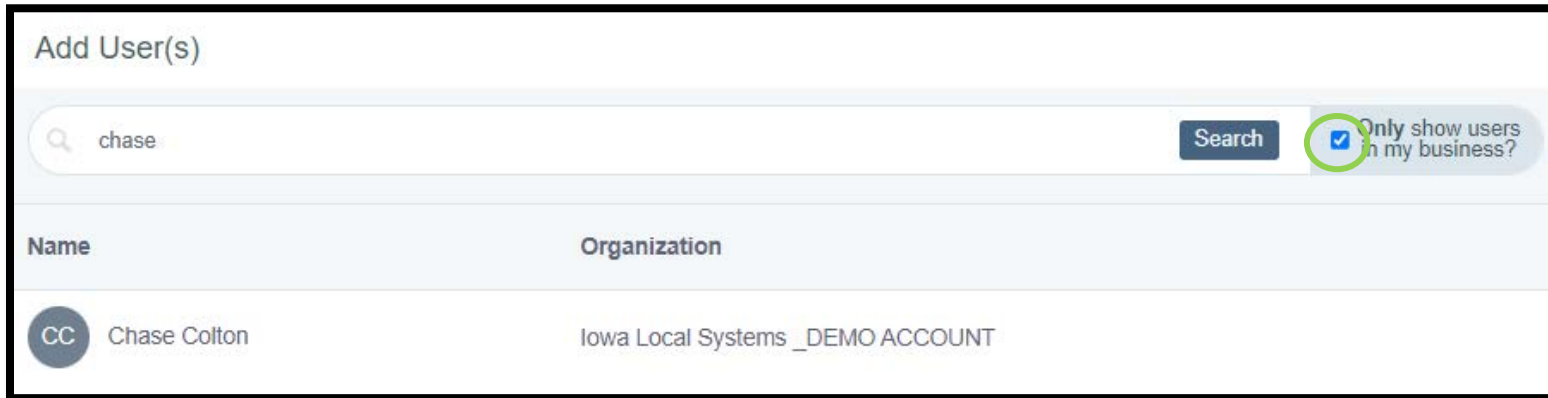
### Add User(s)

☐ Only show users in my business?

Name	Organization
Chase Bleke	Chase Agency Test
Chase Bleke	Chase Agency Test2
Chase Bleke	ESRI Demo Account
Chase Bleke	FG Demo Account
Chase Bleke	Chase Demo Vendor
Chase Bleke	Chase Agency
Chase Colton	Iowa Local Systems _DEMO ACCOUNT

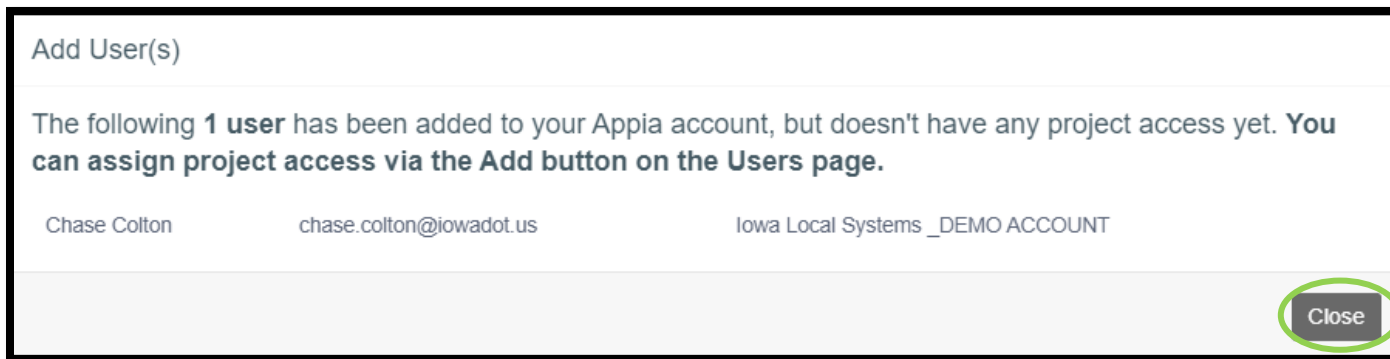
1 User(s)

To restrict the search results to only users already present in your agency's Infotech account, check the box in the upper, right corner that says, "Only show users in my business".



The screenshot shows the 'Add User(s)' interface. At the top, there is a search bar containing the text 'chase' and a 'Search' button. To the right of the search bar is a checkbox labeled 'Only show users in my business?' which is checked. Below the search bar is a table with two columns: 'Name' and 'Organization'. The table contains one entry: a user with initials 'CC' and name 'Chase Colton' from the organization 'Iowa Local Systems \_DEMO ACCOUNT'.

If successful, a window will pop up with a message showing the user has been added, but they do not have access to any projects yet. Click "Close". Then, if that person needs to have access to any existing projects, go to the specific projects and add them as users there as shown in Section [Project Settings](#). Or, you can click on the blue Add in the Projects column adjacent to their name. On the screen that appears, you can provide the new user access to all projects by clicking on the Select All box on the upper right of the screen, or you can provide access to only certain projects by clicking the checkmark found adjacent to the Project ID, then click on Save.



The screenshot shows a confirmation message window titled 'Add User(s)'. The message states: 'The following 1 user has been added to your Appia account, but doesn't have any project access yet. You can assign project access via the Add button on the Users page.' Below the message, there is a table with three columns: Name, Email, and Organization. The table contains one entry: 'Chase Colton', 'chase.colton@iowadot.us', and 'Iowa Local Systems \_DEMO ACCOUNT'. At the bottom right of the window is a 'Close' button.

\*Note: Users needs to be individually added to new projects. They are not automatically added upon project setup.

You will be brought back to the screen with the user list which should have a green ribbon across the top indicating the user was added with “read-only” access.

Users are added to all projects in a read-only role. Change a user's default role by selecting the role in the Default Role column. Change a user's project access by selecting the number in the Projects column.

Doing business as Iowa Local Systems - DEMO ACCOUNT. Switch to another business?

My Business

New users are set to read-only access (unlicensed) by default and do not require a paid license.

### Users

Select the user options menu to remove or change license sets

Manage licenses Add Users

You cannot remove users with devices.

Name	Email	Default Role	Projects	API Access	
Unlicensed users 2					
CC Chase Colton Iowa Local Systems - DEMO ACCOUNT	chase.colton@iowadot.us	Read Only	0 Add	OFF	Devices
NM Nicole Moore Iowa Local Systems - DEMO ACCOUNT	nicole.moore@iowadot.us	Reviewer	15	OFF	Devices
License set 001 7 of 50 used Expires 06/24/2100 Active					
DH Douglas Heeren Iowa Local Systems - DEMO ACCOUNT	douglas.heeren@iowadot.us	System Administrator	ALL	OFF	Devices
JB Jennifer Basener Infotech Iowa Agency	jennifer.basener+testinstance@infotechfl.com	Senior Project Manager	426	OFF	Devices
NS Nicole Stinn Iowa Local Systems - DEMO ACCOUNT	niki.stinn@iowadot.us	System Administrator	ALL	OFF	Devices
SY Sophy Yang Iowa Local Systems - DEMO ACCOUNT	sophy.yang@iowadot.us	System Administrator	ALL	OFF	Devices

### C. Editing User Roles

The user's default role is that role which will be assigned to them for every project created. A role can be changed within a project on a project-by-project basis (see the [Project Settings](#) section of this instruction manual), but the default role should be set to the most commonly expected role for that user.

To change a user's default role, click on the blue text in the "Default Role" column.

The screenshot displays the 'Users' management page. At the top, there are several informational banners. Below these, the 'Users' section is titled, and a 'Manage licenses' dropdown and 'Add Users' button are visible. A table lists users, categorized into 'Unlicensed users' and 'License set 001'. The table columns are Name, Email, Default Role, Projects, API Access, and Devices. The 'Default Role' for Chase Colton is 'Read Only', which is circled in green. Other users have roles like 'Reviewer' and 'System Administrator'.

Name	Email	Default Role	Projects	API Access	Devices
<b>Unlicensed users</b> 2					
CC Chase Colton Iowa Local Systems _DEMO ACCOUNT	chase.colton@iowadot.us	Read Only	0 <a href="#">Add</a>	<input type="checkbox"/> OFF	<a href="#">Devices</a>
NM Nicole Moore Iowa Local Systems _DEMO ACCOUNT	nicole.moore@iowadot.us	Reviewer	15	<input type="checkbox"/> OFF	<a href="#">Devices</a>
<b>License set 001</b> 7 of 50 used Expires 06/24/2100 • Active					
DH Douglas Heeren Iowa Local Systems _DEMO ACCOUNT	douglas.heeren@iowadot.us	System Administrator	ALL	<input type="checkbox"/> OFF	<a href="#">Devices</a>
JB Jennifer Basener Infotech Iowa Agency	jennifer.basener+testinstance@infotechfl.com	Senior Project Manager	426	<input type="checkbox"/> OFF	<a href="#">Devices</a>
NS Nicole Stinn Iowa Local Systems _DEMO ACCOUNT	niki.stinn@iowadot.us	System Administrator	ALL	<input type="checkbox"/> OFF	<a href="#">Devices</a>
SY Sophy Yang Iowa Local Systems _DEMO ACCOUNT	sophy.yang@iowadot.us	System Administrator	ALL	<input type="checkbox"/> OFF	<a href="#">Devices</a>

A window will appear with descriptions for all available roles. Click on the radio button to the left of the desired role. If the selected role does not require a license seat, click the blue “Save” button in the lower, right corner. If the selected role does require a license seat, click the blue “Next” in the lower, right corner. (The “Save” vs. “Next” option will automatically change depending on the selected role.)

Chase Colton  
Read Only

Select a role

<input type="radio"/> Read Only NO LICENSE REQUIRED	<input type="radio"/> Reviewer NO LICENSE REQUIRED
<input checked="" type="radio"/> System Administrator	<input type="radio"/> Senior Project Manager
<input type="radio"/> Project Manager	<input type="radio"/> Inspector

⚠ Selected role requires a license. Go to the next step to select a set with an available license.

Appia role definitions

**Read Only** NO LICENSE REQUIRED  
Read Only users have read-only access to all areas. They cannot modify anything.

**Reviewer** NO LICENSE REQUIRED  
Reviewers review daily reports and daily diaries. They can see all projects in the Under Construction phase but are only able to use the

Cancel **Next**

If the role required a license, and you clicked “Next”, a box will pop up asking you to select a license seat. Click the radio button under the desired license set (if your agency has more than one set). Then click the blue “Save” button.

A modal dialog box titled "Chase Colton" with a "Read Only" status. It prompts the user to "Select a license set". There is a single option, "License set 001", which is selected with a radio button. Below the name, it says "7 of 50 used". To the right, it indicates the license is "Active" and "Expires 06/24/2100". At the bottom, there are "Back", "Cancel", and "Save" buttons. The "Save" button is highlighted with a green circle.

You will be brought back to the user list screen where a green ribbon will appear across the top saying the role has been changed.

The screenshot shows the "Users" management interface. A green notification ribbon at the top states: "Role for Chase Colton changed to System Administrator". Below this, a blue banner reads: "New users are set to read-only access (unlicensed) by default and do not require a paid license." The main content area shows a table of users, categorized into "Unlicensed users" and "License set 001".

Name	Email	Default Role	Projects	API Access	Devices
<b>Unlicensed users (1)</b>					
NM Nicole Moore Iowa Local Systems _DEMO ACCOUNT	nicole.moore@lowadot.us	Reviewer	15	OFF	Devices
<b>License set 001 (8 of 50 used)</b> Expires 06/24/2100 • Active					
CC Chase Colton Iowa Local Systems _DEMO ACCOUNT	chase.colton@lowadot.us	System Administrator	ALL	OFF	Devices
DH Douglas Heeren Iowa Local Systems _DEMO ACCOUNT	douglas.heeren@lowadot.us	System Administrator	ALL	OFF	Devices
IR Jennifer Basener	jennifer.basener@infotechfi.com	Senior Project Manager	426	OFF	Devices



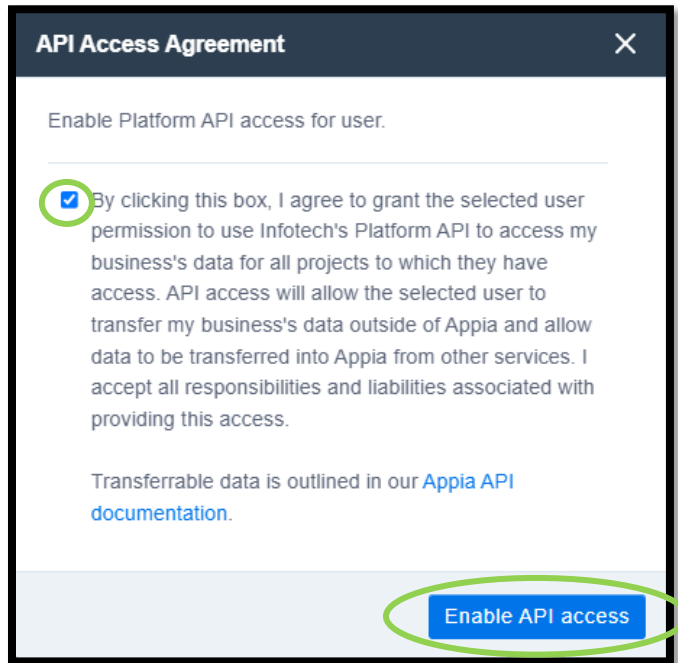
## D. Managing API Access

For county FM projects let on or after January 2024, payments will submit automatically to the Iowa DOT from Appia. In order for the automated submittal process to work, the CPS Contractor Pay Finance user must have access to the project, and the API Access toggle for this user must be “On”. (To add the CPS Contractor Pay Finance user, see the instructions for Adding a User.) To turn API access on, click on the gray toggle switch in the API Access column. When the access is on, the switch will be blue and will say “On”.

The screenshot displays the 'Users' management interface in Appia. The interface includes a sidebar with 'DATA', 'SYSTEM MGT', and 'EXPORT DATA' options. The main content area shows a table of users. A blue banner at the top states 'You cannot remove users with devices.' The table has columns for Name, Email, Default Role, Projects, and API Access. The 'CPS Contractor Pay Finance' user is highlighted with a green circle, and its API Access toggle is also circled in green, showing it is currently 'OFF'. Other users listed include Nicole Moore, Chase Colton, and Douglas Heeren. A license set summary at the bottom indicates 'License set 001' with '8 of 50 used' and an expiration date of '06/24/2100'.

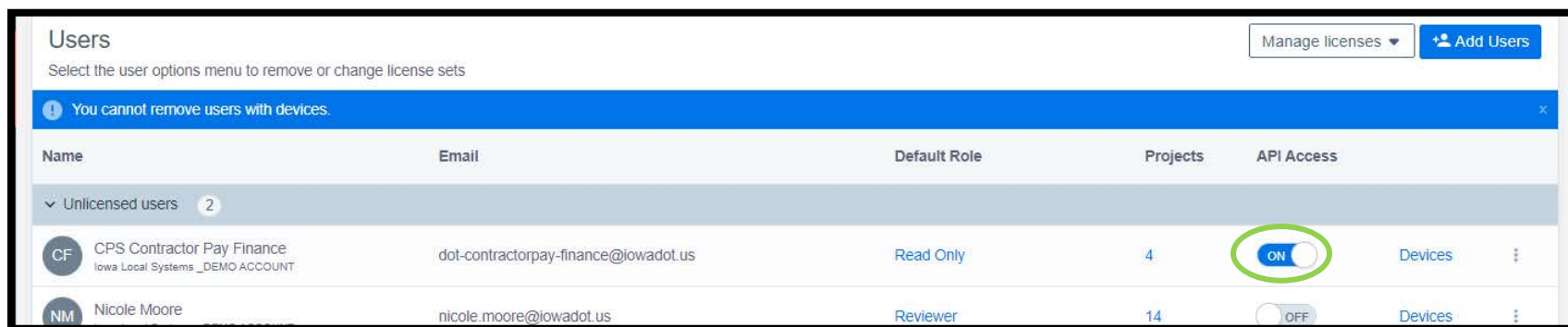
Name	Email	Default Role	Projects	API Access
Unlicensed users 2				
CF CPS Contractor Pay Finance Iowa Local Systems _DEMO ACCOUNT	dot-contractorpay-finance@iowadot.us	Read Only	4	OFF
NM Nicole Moore Iowa Local Systems _DEMO ACCOUNT	nicole.moore@iowadot.us	Reviewer	14	OFF
License set 001 8 of 50 used Expires 06/24/2100 Active				
CC Chase Colton Iowa Local Systems _DEMO ACCOUNT	chase.colton@iowadot.us	System Administrator	ALL	OFF
DH Douglas Heeren Iowa Local Systems _DEMO ACCOUNT	douglas.heeren@iowadot.us	System Administrator	ALL	OFF

When the toggle is clicked, an “API Access Agreement” pop-up window will appear. Click on the check box to the left of the permission statement, and then click on the blue “Enable API access” button in the lower, right corner of the box.



The image shows a pop-up window titled "API Access Agreement" with a close button (X) in the top right corner. The text inside reads: "Enable Platform API access for user." Below this is a paragraph of text starting with "By clicking this box, I agree to grant the selected user permission to use Infotech's Platform API to access my business's data for all projects to which they have access. API access will allow the selected user to transfer my business's data outside of Appia and allow data to be transferred into Appia from other services. I accept all responsibilities and liabilities associated with providing this access." A blue checkmark in a box is circled in green. Below the text is a link: "Transferrable data is outlined in our [Appia API documentation](#)." At the bottom right, there is a blue button labeled "Enable API access" which is also circled in green.

The toggle switch should now be on.



The image shows a "Users" management interface. At the top right, there are buttons for "Manage licenses" and "Add Users". Below this is a blue banner with a warning icon and the text "You cannot remove users with devices." Below the banner is a table with the following columns: Name, Email, Default Role, Projects, API Access, and Devices. The table has two rows of data. The first row is for "CPS Contractor Pay Finance" with email "dot-contractorpay-finance@iowadot.us", role "Read Only", 4 projects, and the "API Access" toggle is turned "ON" (circled in green). The second row is for "Nicole Moore" with email "nicole.moore@iowadot.us", role "Reviewer", 14 projects, and the "API Access" toggle is turned "OFF".

Name	Email	Default Role	Projects	API Access	Devices
CF CPS Contractor Pay Finance Iowa Local Systems_DEMO ACCOUNT	dot-contractorpay-finance@iowadot.us	Read Only	4	ON	Devices
NM Nicole Moore	nicole.moore@iowadot.us	Reviewer	14	OFF	Devices

## E. Viewing & Editing User Project Access

To see what projects any given user has access to, click on the number in the “Projects” column.

New users are set to read-only access (unlicensed) by default and do not require a paid license.

Users

Manage licenses ▾ Add Users

Select the user options menu to remove or change license sets

You cannot remove users with devices.

Name	Email	Default Role	Projects	API Access	
Unlicensed users 2					
<div>CF</div> <div>CPS Contractor Pay Finance</div> <div>Iowa Local Systems_DEMO ACCOUNT</div>	dot-contractorpay-finance@iowadot.us	Read Only	4	<div>ON</div>	<div>Devices</div> <div></div>
<div>NM</div> <div>Nicole Moore</div> <div>Iowa Local Systems_DEMO ACCOUNT</div>	nicole.moore@iowadot.us	Reviewer	14	<div>OFF</div>	<div>Devices</div> <div></div>
License set 001 8 of 50 used Expires 06/24/2100 Active					
<div>CC</div> <div>Chase Colton</div> <div>Iowa Local Systems_DEMO ACCOUNT</div>	chase.colton@iowadot.us	System Administrator	ALL	<div>OFF</div>	<div>Devices</div> <div></div>
<div>DH</div> <div>Douglas Heeren</div> <div>Iowa Local Systems_DEMO ACCOUNT</div>	douglas.heeren@iowadot.us	System Administrator	ALL	<div>OFF</div>	<div>Devices</div> <div></div>
<div>JB</div> <div>Jennifer Basener</div> <div>Infotech Iowa Agency</div>	jennifer.basener+testinstance@infotechfi.com	Senior Project Manager	424	<div>OFF</div>	<div>Devices</div> <div></div>

A window will appear listing all the projects available and what the user's assigned role is for each project. If the user already has access to a project, the circle with the check mark will be green at the right end of the line containing the project number. If they do not currently have access to a project, the circle with the check mark will be gray.

My Business / Nicole Moore Projects

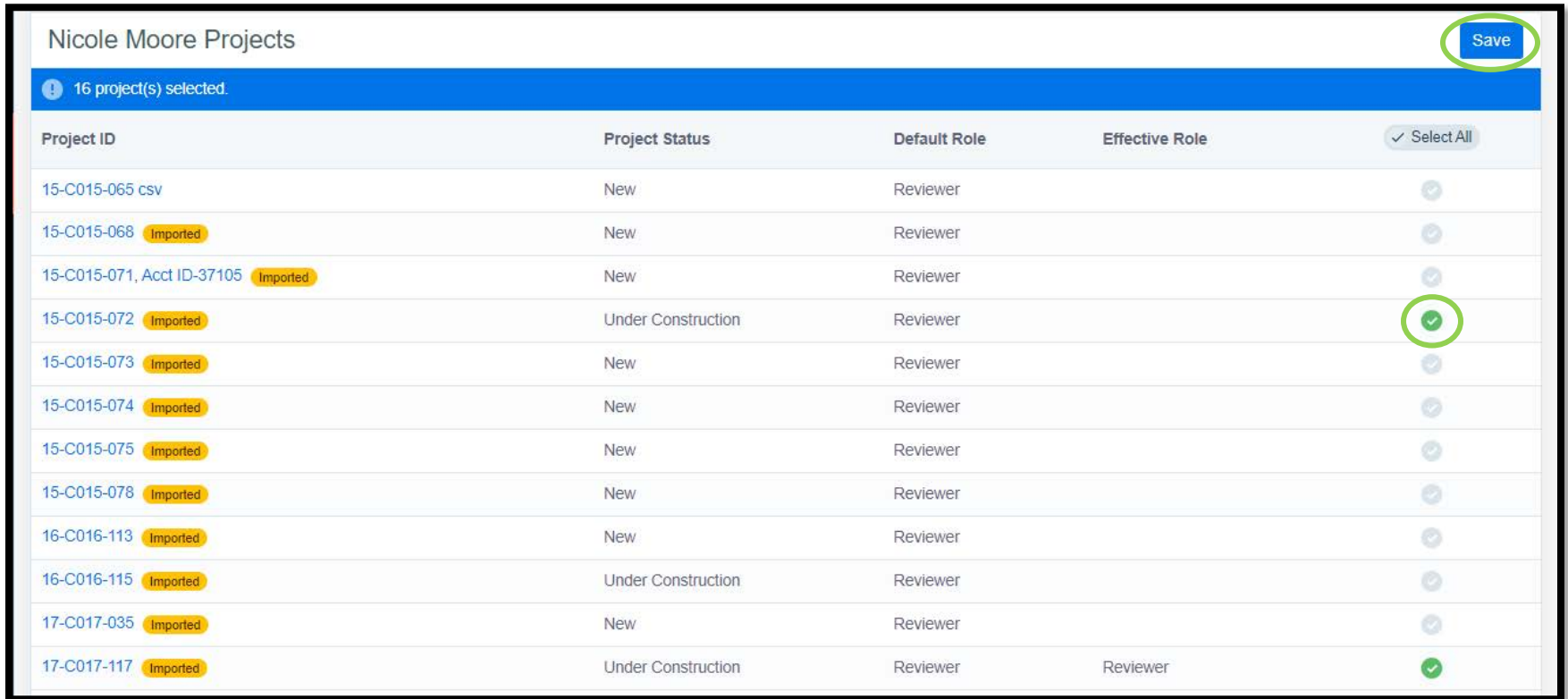
### Nicole Moore Projects

15 project(s) selected.

Save

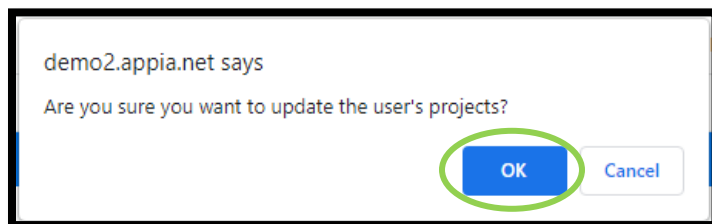
Project ID	Project Status	Default Role	Effective Role	✓ Select All
15-C015-065 csv	New	Reviewer		<input type="checkbox"/>
15-C015-068 Imported	New	Reviewer		<input type="checkbox"/>
15-C015-071, Acct ID-37105 Imported	New	Reviewer		<input type="checkbox"/>
15-C015-072 Imported	Under Construction	Reviewer		<input checked="" type="checkbox"/>
15-C015-073 Imported	New	Reviewer		<input type="checkbox"/>
15-C015-074 Imported	New	Reviewer		<input type="checkbox"/>
15-C015-075 Imported	New	Reviewer		<input type="checkbox"/>
15-C015-078 Imported	New	Reviewer		<input type="checkbox"/>
16-C016-113 Imported	New	Reviewer		<input type="checkbox"/>
16-C016-115 Imported	Under Construction	Reviewer		<input type="checkbox"/>
17-C017-035 Imported	New	Reviewer		<input type="checkbox"/>
17-C017-117 Imported	Under Construction	Reviewer	Reviewer	<input checked="" type="checkbox"/>
18-91 Imported	New	Reviewer		<input type="checkbox"/>
18-C018-076 Imported	Completed	Reviewer		<input type="checkbox"/>

To add access to a project, simply click the circle with the check mark so that it turns green. Then hit the blue “Save” button in the upper, right corner. (Alternately, go into the desired project and add them within the project according to the [Project Settings](#) section.)



Project ID	Project Status	Default Role	Effective Role	✓ Select All
15-C015-065 csv	New	Reviewer		✓
15-C015-068 Imported	New	Reviewer		✓
15-C015-071, Acct ID-37105 Imported	New	Reviewer		✓
15-C015-072 Imported	Under Construction	Reviewer		✓
15-C015-073 Imported	New	Reviewer		✓
15-C015-074 Imported	New	Reviewer		✓
15-C015-075 Imported	New	Reviewer		✓
15-C015-078 Imported	New	Reviewer		✓
16-C016-113 Imported	New	Reviewer		✓
16-C016-115 Imported	Under Construction	Reviewer		✓
17-C017-035 Imported	New	Reviewer		✓
17-C017-117 Imported	Under Construction	Reviewer	Reviewer	✓

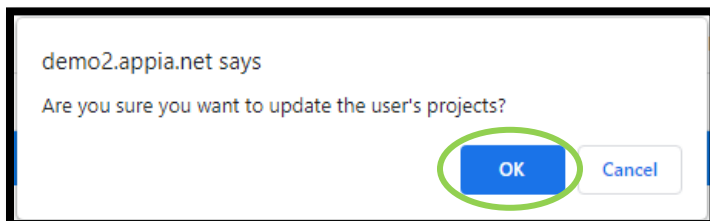
A box will pop up asking if you are sure you want to update the user’s projects. Click “Ok”.



To remove access to a project, simply click on the green circle with the check mark on the right side of the project's line so that it turns gray. Then click the blue "Save" button in the upper, right corner.

Project ID	Project Status	Default Role	Effective Role	✓ Select All
15-C015-065 csv	New	Reviewer		<input type="checkbox"/>
15-C015-068 Imported	New	Reviewer		<input type="checkbox"/>
15-C015-071, Acct ID-37105 Imported	New	Reviewer		<input type="checkbox"/>
15-C015-072 Imported	Under Construction	Reviewer	Reviewer	<input type="checkbox"/>
15-C015-073 Imported	New	Reviewer		<input checked="" type="checkbox"/>
15-C015-074 Imported	New	Reviewer		<input type="checkbox"/>
15-C015-075 Imported	New	Reviewer		<input type="checkbox"/>
15-C015-078 Imported	New	Reviewer		<input type="checkbox"/>
16-C016-113 Imported	New	Reviewer		<input type="checkbox"/>
16-C016-115 Imported	Under Construction	Reviewer		<input type="checkbox"/>
17-C017-035 Imported	New	Reviewer		<input type="checkbox"/>
17-C017-117 Imported	Under Construction	Reviewer	Reviewer	<input checked="" type="checkbox"/>

A box will pop up asking if you are sure you want to update the user's projects. Click "Ok".



## F. Licensing

Each Local Public Agency (LPA) is allowed 10 license seats for Appia. The number of license seats being used is shown on the Users screen as shown below.

The screenshot shows the 'My Business' interface for Appia. A blue banner at the top states: 'New users are set to read-only access (unlicensed) by default and do not require a paid license.' Below this is the 'Users' section with a subtitle 'Select the user options menu to remove or change license sets'. A 'Manage licenses' dropdown and an 'Add Users' button are in the top right. A blue warning bar says 'You cannot remove users with devices.' The main table lists users with columns: Name, Email, Default Role, Projects, API Access, and Devices. The table is divided into two sections: 'Unlicensed users' (1 user) and 'License set 001' (8 of 50 used). The 'License set 001' section is highlighted with a green circle around the '8 of 50 used' text. The table lists four users: Nicole Moore (Reviewer, 15 projects), Chase Colton (System Administrator, ALL projects), Douglas Heeren (System Administrator, ALL projects), and Jennifer Basener (Senior Project Manager, 426 projects). Each user row has a 'Devices' column with a toggle switch and a 'Devices' link.

Name	Email	Default Role	Projects	API Access	Devices
<b>Unlicensed users</b> 1					
NM Nicole Moore Iowa Local Systems _DEMO ACCOUNT	nicole.moore@iowadot.us	Reviewer	15	OFF	Devices
<b>License set 001</b> 8 of 50 used Expires 06/24/2100 Active					
CC Chase Colton Iowa Local Systems _DEMO ACCOUNT	chase.colton@iowadot.us	System Administrator	ALL	OFF	Devices
DH Douglas Heeren Iowa Local Systems _DEMO ACCOUNT	douglas.heeren@iowadot.us	System Administrator	ALL	OFF	Devices
JB Jennifer Basener Infotech Iowa Agency	jennifer.basener+testinstance@infotechfl.com	Senior Project Manager	426	OFF	Devices

License seats for LPAs are managed by the Iowa DOT. **If an LPA needs an additional license seat, they should contact the Local Systems E-Construction Administrator**, whose contact information is shown in the [Help & Local Systems Contact Information for Questions and Assistance section](#).

Consultants may manage their licenses using the “Manage Licenses” drop-down menu in the upper, right corner.

The screenshot displays the 'Users' management page in a software application. The page title is 'My Business'. A blue banner at the top contains a message: 'New users are set to read-only access (unlicensed) by default and do not require a paid license.' Below this, the 'Users' section has a subtitle: 'Select the user options menu to remove or change license sets'. A blue warning bar states: 'You cannot remove users with devices.' The main content is a table with columns: Name, Email, Default Role, Projects, and a set of controls (toggle, Devices link, and a three-dot menu). The table is divided into two sections: 'Unlicensed users' (1 user) and 'License set 001' (8 of 50 used, Expires 06/24/2100, Active). The 'Unlicensed users' section lists Nicole Moore (Reviewer, 15 projects). The 'License set 001' section lists Chase Colton (System Administrator, ALL projects) and Douglas Heeren (System Administrator, ALL projects). In the top right corner, there is a 'Manage licenses' dropdown menu, which is circled in green. The dropdown menu options are: '+ Add to an existing license set', 'Renew a license set', and 'New license set'. There is also an 'Add Users' button next to the dropdown.

Name	Email	Default Role	Projects	Controls
<strong>Unlicensed users</strong> 1				
NM Nicole Moore <small>Iowa Local Systems_DEMO ACCOUNT</small>	nicole.moore@iowadot.us	Reviewer	15	<input type="checkbox"/> OFF <a href="#">Devices</a> ⋮
<strong>License set 001</strong> 8 of 50 used Expires 06/24/2100 <span>Active</span>				
CC Chase Colton <small>Iowa Local Systems_DEMO ACCOUNT</small>	chase.colton@iowadot.us	System Administrator	ALL	<input type="checkbox"/> OFF <a href="#">Devices</a> ⋮
DH Douglas Heeren <small>Iowa Local Systems_DEMO ACCOUNT</small>	douglas.heeren@iowadot.us	System Administrator	ALL	<input type="checkbox"/> OFF <a href="#">Devices</a> ⋮



# 12 - Default Settings: Project Settings

(System Administrator access level required.)

Default settings will be those that are applied to any project that is created. Many settings can be tweaked on a project-by-project basis, but you will want to set up the defaults to the most commonly used settings. To do so, click on the “System Management” tab in the left menu of the project listing screen.

To view or change the project settings, including report logos, retainage settings, worksheet usage setting, payment overage setting, signature lines, and daily report/diary settings, click on “Settings” in the expanded sub-menu.

NOTE: If you do not have a project name shown at the top, you are editing the settings at the global/default level in Appia, as opposed to editing your individual project settings. If you wish to edit your individual project settings, you will need to select the project and choose “More” and then “Project Settings” from the left menu. (See the [Project Settings](#) section of this instructional manual.)

Projects

## My Projects

Find Project

Create Project Import Project

Status: Under Construction Advanced

**Under Construction**

**Pro tip:**  
Click or tap the star to add a project to your favorite projects. My Projects will default to Favorites at next login if a favorite is selected.  
[Dismiss](#)

	Description	
★	03-C003-062	+
★	STP-S-C011(71)--5E-11 - 29427	+
★	36-C036-074 JSON TEST/FINANCE Imported	+
★	BHM-SWAP-1827(684)--SA-82-1 12345	+
★	BROS-C004(103)--8J-04 - 35155	+
★	BROS-C078(111)--FF-78_Payment for Multiple Sections	+
★	BROS-C086(60)--8J-86 - 31961	+
★	BRS-C036(74)--60-36 - AcctID	+
★	BRS-C036(74)--60-36 - AcctID_02_Central01	+
★	BRS-C036(74)--60-36 - AcctID_03_West01	+

### A. General Project Settings: Report Names and Logo

The first tab shown in Project Settings is “General”.

Enter a “Report Display Name” if desired by typing in the text box.

Upload a “Report Logo” (such as a county/city logo) if you have one available.  
This will aid Finance in distinguishing whose account to debit for payments.

Settings

MY PROJECTS

REFERENCE DATA

SYSTEM MGT

EXPORT DATA

HELP

Settings

GENERAL CONSTRUCTION

Changes to the global settings affect only new projects.

Report Display Name

Report Logo

Choose File No file chosen

Report Logo Preference

- ☐ Do not display a logo
- ☐ Display the Appia product logo
- ☒ Display your organization's logo

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Click “Save” when finished. This will kick you back out to the project overview screen.

## B. Construction Settings: Payment Rules, Worksheet Rule, Daily Report Rules

Again, go to the “System Management” button on the left menu and select “Settings” in the expanded menu. Then choose the second tab called “Construction”.

86-C086-060 New  
Gladbrook Bridge Replacement, BROS-C086(60)--8J-86 - 31961, Letting Date: October 21, 2014

GENERAL **CONSTRUCTION** PROJECT SECURITY

Project Settings Save Cancel

**Payment Retainage Rule**

- ☐ Do not cap retainage
- ☐ Cap retainage at 0.000% of awarded project amount
- ☐ Cap retainage at 0.000% of authorized project amount
- ☒ Cap retainage at \$30,000.00
- ☐ Retain last 0.000% of awarded project amount
- ☐ Retain last 0.000% of authorized project amount

**Stockpile Retainage Rule**

- ☒ Retain stockpile advancements?

**Worksheet Calculations Rule**

- ☒ Use worksheets in Item Postings?

This setting can't be changed in an under construction project.

**Signature Line for Payment Reports**

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**Payment for Work Overages Rule**

- ☐ Do not pay over item's authorized quantity
- ☐ Pay over item's authorized quantity
- ☐ Pay up to 0.000% over item's authorized quantity
- ☒ Pay up to \$50,000.00 over item's authorized quantity

**Daily Report Carry Over Rules**

- ☒ Carry Over Personnel to the Daily Report
- ☒ Carry Over Equipment to the Daily Report

**Daily Diary Carry Over Rules**

- ☒ Carry Over Personnel to the Daily Diary
- ☒ Carry Over Equipment to the Daily Diary
- ☒ Carry Over Item Postings to the Daily Diary
- ☒ Carry Over Attachments to the Daily Diary

Set the following settings and click “Save” when finished:

- **Payment Retainage Rule:**
  - For all projects following DOT specifications, select the “**Cap retainage at \_\_\_\_\_**” option and enter **\$30,000**.
  - For projects following SUDAS specifications, choose the appropriate option.
  - For all other projects, choose the appropriate option for the specifications in use.

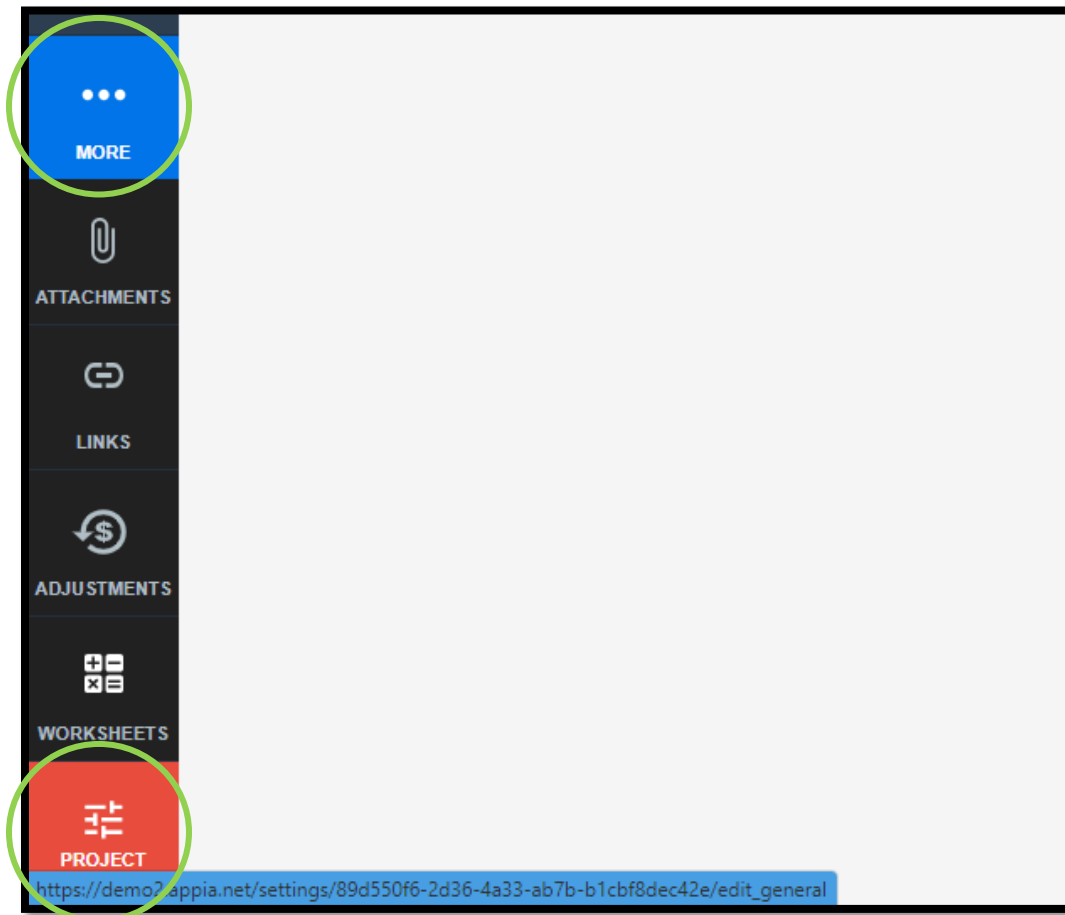
- Stockpile Retainage Rule:
  - If this box is checked, retainage will be withheld from stockpile payments.
  - If this box is left unchecked, no retainage will be withheld from stockpile payments.
  - For Local Agencies, as of November 2023, retainage is being withheld on stockpiles. Therefore, for projects administered by the DOT, please check the box so that retainage is withheld.
- Worksheet Calculation Rule
  - If this box is checked, worksheets will be available for use in calculating quantities in the Item Postings sections of Daily Reports.
    - Note: Even if this box is checked and worksheets are active, the user can ignore them or override the quantity postings as needed. **Therefore, we recommend always leaving this box checked.**
  - If this box is left unchecked, worksheets will NOT be available for use in calculating quantities in the Item Postings sections of Daily Reports.
    - Note: This setting cannot be reversed after a project is “Advanced to Construction”.
- Signature Line for Payment Reports
  - The user may set up their own signature lines to be shown on payment vouchers.
  - The user does NOT need to set up signature lines for any project in which vouchers are digitally signed in DocExpress by all necessary parties.
    - EXCEPTION: For counties, final payments for projects being paid using FM funds need a signature line for the Board of Supervisors signature. The Board of Supervisors does not have access to the appropriate drawer in Doc Express to place a digital signature on the payment. It is recommended that the Board of Supervisors wet-sign the final voucher prior to the voucher being uploaded to Doc Express for the remaining digital signatures.
  - This may be a useful function for locally paid vouchers.
- Signature Line for Change Order Reports
  - The user may set up their own signature lines to be shown on change orders.
  - The user does NOT need to set up signature lines for any project in which change orders are digitally signed in DocExpress.
  - This may be a useful function for locally approved change orders.
- Payment for Work Overages Rule
  - Option 1: “Do not pay over item’s authorized quantity”
    - This option will require a change order in order for payment to be made on an item that exceeds the contract quantity.
  - Option 2: “Pay over item’s authorized quantity”
    - This option will allow any quantity to be paid, even if it exceeds the contract quantity.
    - The user is responsible for knowing when a change order is necessary and required. Guidance on change orders can be found in the [Iowa DOT Construction Manual, Section 2.36](#).

- Option 3: “Pay up to \_\_\_\_% over authorized item quantity”
  - This option will allow payment to be made on any item up to the specified % overage beyond the contract quantity.
  - A change order will be required to be processed for any payment exceeding the specified overage limit.
  - This option is not recommended when using Iowa DOT specifications because it does not fit the DOT model at all.
- Option 4: “Pay up to \$\_\_\_\_ over item’s authorized amount”. **(Recommended)**
  - This option will allow payment to be made on any item up to the specified \$ overage beyond the contract quantity.
  - A change order will be required to be processed for any payment exceeding the specified overage limit.
  - This option is recommended for projects using Iowa DOT specifications because Iowa DOT policy currently allow overages on any item up to \$50,000. (Overages on individual items which exceed \$50,000 require a change order.)
- Daily Report & Daily Diary Carryover Rules
  - If these boxes are left checked, the listed elements of Daily Reports and Daily Diaries will be copied to newly created reports/diaries so the user does not need to enter the information again on each report.
  - Note, if left checked, the inspector entering the information in the reports/diaries must be diligent in recording changes from day to day if there are any.

# 13 - Project Settings

To check the project settings, open a project and go to the “More” button on the left menu. When you click on the “More” button, the menu will expand to show more options. Select “Project Settings”. The screen below will appear with three tabs across the top: “General”, “Construction”, “Integrations”, and “Project Security”.

NOTE: If you have a project name shown at the top, you are editing the settings at the individual project level in Appia, as opposed to editing your global default settings. If you wish to edit your global default settings, you will need to back out of the project and choose “System Management” and then “Settings” from the global Appia screen. (See the [Default Settings: Project Settings](#) section of this instructional manual.)





QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

08-C008-089

Under Construction

FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023

GENERAL

CONSTRUCTION

INTEGRATIONS

PROJECT SECURITY

Project Settings

SaveCancel

Report Display Name

Name to use in place of the agency name on PDF reports. If left blank, the agency name will be used.

Report Logo

Choose FileNo file chosen

IOWA DOT

Report Logo Preference

☐ Do not display a logo

☐ Display the Appia product logo

☒ Display your organization's logo

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### A. General Project Settings: Report Names and Logo

The first tab shown in Project Settings is “General”.

Enter a “Report Display Name” if desired by typing in the text box.

Upload a “Report Logo”, such as your County or City logo, if you have one available.

This will aid Finance in distinguishing whose account to debit for payments.

86-C086-060 - 31961 New  
Gardbrook Bridge Replacement Letting Date: October 21, 2014

OVERVIEW  
ALL REPORTS  
ITEMS  
TIME LIMITS  
FUNDING  
**MORE**  
ATTACHMENTS  
LINKS  
**PROJECT SETTINGS**

GENERAL CONSTRUCTION PROJECT SECURITY

Project Settings

Report Display Name

Name to use in place of the agency name on PDF reports. If left blank, the agency name will be used.

Report Logo Preference

☐ Do not display a logo

☐ Display the Appia product logo

☒ Display your organization's logo..

Report Logo

Choose File No file chosen

Save Cancel

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Click “Save” when finished. This will kick you back out to the project overview screen.

## B. Construction Settings: Payment Rules, Worksheet Rule, Daily Report Rules

Again, go to the “More” button on the left menu and select “Project Settings”. Then choose the second tab called “Construction”.

86-C086-060 New  
Gladbrook Bridge Replacement, BROS-C086(60)--8J-86 - 31961, Letting Date: October 21, 2014

GENERAL **CONSTRUCTION** PROJECT SECURITY

Project Settings Save Cancel

**Payment Retainage Rule**

- ☐ Do not cap retainage
- ☐ Cap retainage at  of awarded project amount
- ☐ Cap retainage at  of authorized project amount
- ☒ Cap retainage at
- ☐ Retain last  of awarded project amount
- ☐ Retain last  of authorized project amount

**Payment for Work Overages Rule**

- ☐ Do not pay over item's authorized quantity
- ☐ Pay over item's authorized quantity
- ☐ Pay up to  over item's authorized quantity
- ☒ Pay up to  over item's authorized quantity

**Stockpile Retainage Rule**

- ☒ Retain stockpile advancements?

**Worksheet Calculations Rule**

- ☒ Use worksheets in Item Postings?  
This setting can't be changed in an under construction project.

**Signature Line for Payment Reports**

12pt **B** *I* U [Text Formatting Icons] Preview PDF

**Daily Report Carry Over Rules**

- ☒ Carry Over Personnel to the Daily Report
- ☒ Carry Over Equipment to the Daily Report

**Daily Diary Carry Over Rules**

- ☒ Carry Over Personnel to the Daily Diary
- ☒ Carry Over Equipment to the Daily Diary
- ☒ Carry Over Item Postings to the Daily Diary
- ☒ Carry Over Attachments to the Daily Diary

Set the following settings and click “Save” when finished:

- **Payment Retainage Rule:**
  - For all projects following DOT specifications, select the “**Cap retainage at \_\_\_\_\_**” option and enter **\$30,000**.
  - For projects following SUDAS specifications, choose the appropriate option.
  - For all other projects, choose the appropriate option for the specifications in use.

- Stockpile Retainage Rule:
  - If this box is checked, retainage will be withheld from stockpile payments.
  - If this box is left unchecked, no retainage will be withheld from stockpile payments.
  - For Local Agencies, as of November 2023, retainage is being withheld on stockpiles. Therefore, for projects administered by the DOT, please check the box so that retainage is withheld.
- Worksheet Calculation Rule
  - If this box is checked, worksheets will be available for use in calculating quantities in the Item Postings sections of Daily Reports.
    - Note: Even if this box is checked and worksheets are active, the user can ignore them or override the quantity postings as needed. **Therefore, we recommend always leaving this box checked.**
  - If this box is left unchecked, worksheets will NOT be available for use in calculating quantities in the Item Postings sections of Daily Reports.
    - Note: This setting cannot be reversed after a project is “Advanced to Construction”.
- Signature Line for Payment Reports
  - The user does NOT need to set up signature lines for any project in which vouchers are digitally signed in DocExpress by all necessary parties.
    - EXCEPTION: For counties, final payments for projects being paid using FM funds need a signature line for the Board of Supervisors signature. The Board of Supervisors does not have access to the appropriate drawer in Doc Express to place a digital signature on the payment. It is recommended that the Board of Supervisors wet-sign the final voucher prior to the document being uploaded to Doc Express for the remaining required digital signatures.
  - The user may set up their own signature lines to be shown on payment vouchers.
  - This may be a useful function for locally paid vouchers.
- Signature Line for Change Order Reports
  - The user does NOT need to set up signature lines for any project in which change orders are digitally signed in DocExpress.
  - The user may set up their own signature lines to be shown on change orders.
  - This may be a useful function for locally approved change orders.
- Payment for Work Overages Rule
  - Option 1: “Do not pay over item’s authorized quantity”
    - This option will require a change order in order for payment to be made on an item that exceeds the contract quantity.
  - Option 2: “Pay over item’s authorized quantity”
    - This option will allow any quantity to be paid, even if it exceeds the contract quantity.
    - The user is responsible for knowing when a change order is necessary and required. Guidance on change orders can be found in the [Iowa DOT Construction Manual, Section 2.36](#).

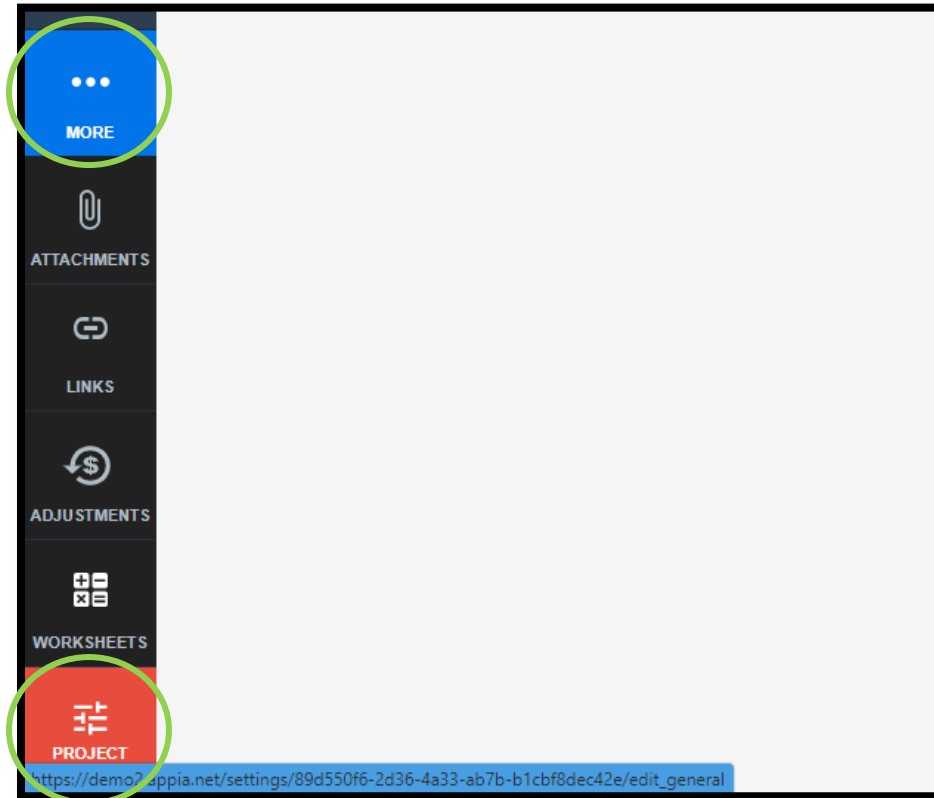
- Option 3: “Pay up to \_\_\_\_% over authorized item quantity”
  - This option will allow payment to be made on any item up to the specified % overage beyond the contract quantity.
  - A change order will be required to be processed for any payment exceeding the specified overage limit.
  - This option is not recommended when using Iowa DOT specifications because it does not fit the DOT model at all.
- Option 4: “Pay up to \$\_\_\_\_ over item’s authorized amount”. **(Recommended)**
  - This option will allow payment to be made on any item up to the specified \$ overage beyond the contract quantity.
  - A change order will be required to be processed for any payment exceeding the specified overage limit.
  - This option is recommended for projects using Iowa DOT specifications because Iowa DOT policy currently allow overages on any item up to \$50,000. (Overages on individual items which exceed \$50,000 require a change order.)
- Daily Report & Daily Diary Carryover Rules
  - If these boxes are left checked, the listed elements of Daily Reports and Daily Diaries will be copied to newly created reports/diaries so the user does not need to enter the information again on each report.
  - Note, if left checked, the inspector entering the information in the reports/diaries must be diligent in recording changes from day to day if there are any.

### C. Integrations

Please refer to the Integrating Appia with Doc Express for Submittals section in the [Appia “Under Construction” Instructions](#).

### D. Project Security Settings: Project-Specific Users and Roles

Again, go to the “More” button on the left menu and select “Project Settings”. Then choose the fourth tab called “Project Security”.



08-C008-089 Under Construction  
 FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023

GENERAL CONSTRUCTION INTEGRATIONS **PROJECT SECURITY**

### Project Users Add Users

Name	Default Role	Project Role
Chase Colton	System Administrator	
Douglas Heeren	System Administrator	
Nicole Stinn	System Administrator	
Sophy Yang	System Administrator	
Theodore Katseres	System Administrator	
Troy Strum	System Administrator	
Wei Zhao	System Administrator	

Displaying all 7 users

This is where you can view which users have access to the selected project.

NOTE: If you have a project name shown at the top, you are editing the settings at the individual project level in Appia, as opposed to editing your global default settings. If you wish to edit your global default settings, you will need to back out of the project and choose “System Management” and then “My Business” from the global Appia screen. (See the [Default Settings: Users – Adding/Deleting, Roles, Project Access, Licenses](#) section of this instructional manual.)

Each user that has access to the project is shown in this screen. Users are automatically assigned to their default roles when a project is created. If you want to change their role for this particular project, click on the blue “Assign Project Role” text in the “Project Role” column.

OVERVIEW

ALL REPORTS

ITEMS

TIME LIMITS

FUNDING

MORE

86-C086-060 - 31961 New

Gladbrook Bridge Replacement Letting Date: October 21, 2014

GENERAL

CONSTRUCTION

PROJECT SECURITY

Project Users

Remove Users

0 eligible user(s) have been selected for removal. [Select all eligible users?](#)

Name	Default Role	Project Role	<input checked="" type="checkbox"/> Select All
Jennifer Basener	System Administrator		
Nicole Moore	Project Manager	Assign Project Role	<input checked="" type="checkbox"/>
Nicole Stinn	System Administrator		
Student #16	Senior Project Manager	Assign Project Role	<input checked="" type="checkbox"/>
Student #17	Senior Project Manager	Assign Project Role	<input checked="" type="checkbox"/>
Student #18	Senior Project Manager	Assign Project Role	<input checked="" type="checkbox"/>
Student #19	Senior Project Manager	Assign Project Role	<input checked="" type="checkbox"/>



A window will pop up in which each of the user roles are explained. Click on the radio button on the left side of the role you desire for the user. Click “Save” when finished.

Assign project role to Student #16

☐ **Read Only**  
Read Only users have read-only access to all areas. They cannot modify anything.

☐ **Reviewer**  
Reviewers review daily reports and daily diaries. They can see all projects in the Under Construction phase but are only able to use the Mark as Reviewed function for the daily reports and daily diaries.

☒ **Senior Project Manager**  
Senior Project Managers can add and change a project in the New phase. They have Project Manager access in the Construction phase.

☐ **Project Manager**  
Project Managers can only see projects to which they are assigned in the Under Construction and Completed phases. They have full write access to all areas of their assigned projects in these phases.

You will be taken back out to the screen showing the user list. A green ribbon will appear across the top if the user's role was modified successfully.

The screenshot shows a web application interface with a dark sidebar on the left containing navigation icons and labels: OVERVIEW, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, and a cluster of dots. The main content area has a green notification bar at the top stating "The role has been assigned." Below it is a blue bar with a warning icon and text: "Doing business as Iowa Local Systems \_DEMO ACCOUNT. [Switch to another business?](#)". The breadcrumb trail reads "Projects / 08-C008-089 / Settings". The project ID "08-C008-089" is displayed with a red "Under Construction" tag, followed by the text "FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023". A tabbed interface shows "GENERAL", "CONSTRUCTION", "INTEGRATIONS", and "PROJECT SECURITY" (which is active). The "Project Users" section includes "Add Users" and "Remove Users" buttons. A blue warning bar states "0 eligible user(s) have been selected for removal. [Select all eligible users?](#)". Below this is a table with columns "Name", "Default Role", and "Project Role". The table lists three users: Chase Colton (System Administrator), Douglas Heeren (System Administrator), and Nicole Moore (Reviewer). The "Project Role" column for Nicole Moore shows "Read Only" with a checkmark icon. A "Select All" button is in the top right of the table.

OVERVIEW

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

The role has been assigned.

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

Projects / 08-C008-089 / Settings

08-C008-089 Under Construction

FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023

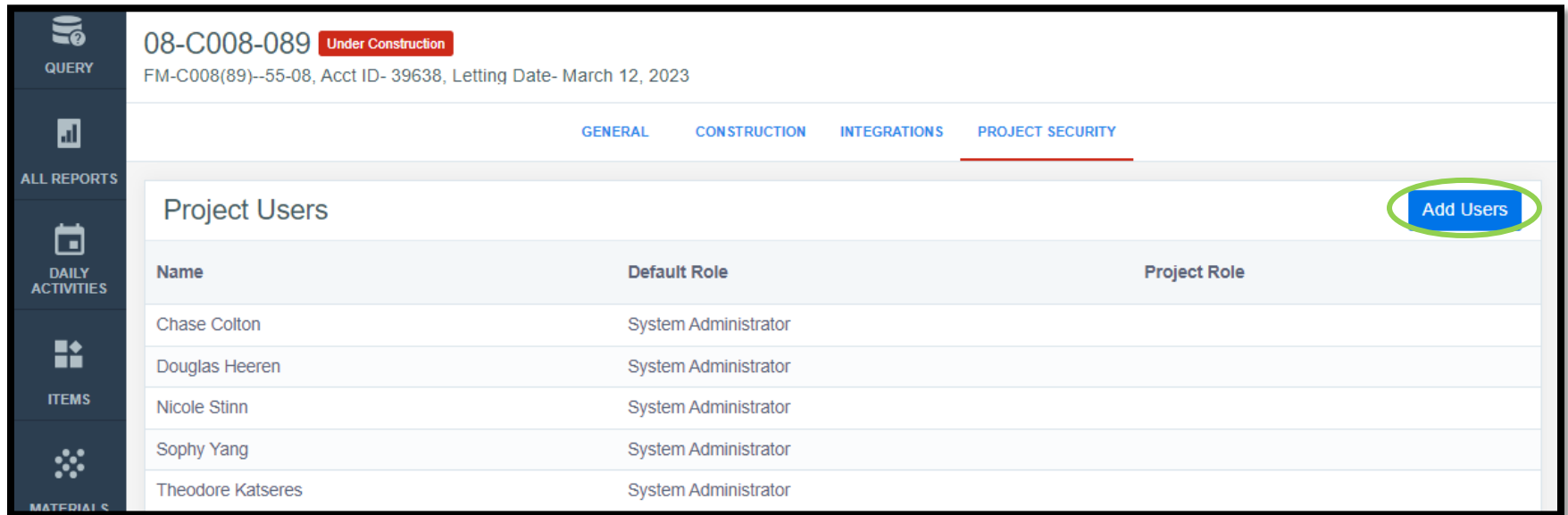
GENERAL CONSTRUCTION INTEGRATIONS **PROJECT SECURITY**

Project Users Add Users Remove Users

0 eligible user(s) have been selected for removal. [Select all eligible users?](#)

Name	Default Role	Project Role	✓ Select All
Chase Colton	System Administrator		
Douglas Heeren	System Administrator		
Nicole Moore	Reviewer	Read Only	✓

To add users to the project, click on the “Add Users” button on the right side. Added users will be assigned the default role. Once added you may need to change their role as explained above.



The screenshot displays the 'Project Users' section of a software interface. On the left is a dark sidebar with icons and labels: 'QUERY', 'ALL REPORTS', 'DAILY ACTIVITIES', 'ITEMS', and 'MATERIALS'. The main header area shows the project ID '08-C008-089' with a red 'Under Construction' tag, and project details: 'FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023'. Below this is a tabbed interface with 'GENERAL', 'CONSTRUCTION', 'INTEGRATIONS', and 'PROJECT SECURITY' (the active tab). The 'Project Users' title is at the top of the content area. In the top right corner of this area is a blue 'Add Users' button, which is circled in green. Below the title is a table with three columns: 'Name', 'Default Role', and 'Project Role'. The table lists five users, all with the 'System Administrator' default role.

Name	Default Role	Project Role
Chase Colton	System Administrator	
Douglas Heeren	System Administrator	
Nicole Stinn	System Administrator	
Sophy Yang	System Administrator	
Theodore Katseres	System Administrator	

Note: The “Add User” button will not show up if all users in your account are already assigned to the project.

This window will pop up where you can search for the desired user.

Note: If the user cannot be found, they may not have been added to your Appia account yet. In that case, you will need to go to the “My Account” page and add them. (See the [Setting Up Appia & "My Account" Screen](#) section of the instructional manual.)

The screenshot shows a dialog box titled "Add User(s)". At the top is a search bar with the placeholder text "Search for User Name" and a "Search" button. Below the search bar is a table with two columns: "Name" and "Organization". The table contains one row with a circular icon containing "s#" next to the name "student #9" and the organization "Iowa Local Systems \_DEMO ACCOUNT". At the bottom left, it says "0 User(s)". At the bottom right, there are two buttons: "Add" (disabled) and "Cancel".

To add the user, simply click on the line containing the user’s name. A green circle with a check mark will appear on the right side of the row. Click “Add”.

The screenshot shows the same dialog box, but now the search bar contains the text "student". The table row for "student #9" is highlighted in yellow, and a green checkmark icon is visible on the right side of the row. At the bottom left, it now says "1 User(s)". At the bottom right, the "Add" button is now active and highlighted with a green circle, while the "Cancel" button remains disabled.

You will be taken back out to the screen showing the user list. A green ribbon will appear across the top if the user was added successfully.

The user has been added.

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

Projects / 08-C008-089 / Settings

**08-C008-089** Under Construction

FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023

GENERAL CONSTRUCTION INTEGRATIONS **PROJECT SECURITY**

**Project Users** Add Users Remove Users

0 eligible user(s) have been selected for removal. [Select all eligible users?](#)

Name	Default Role	Project Role
Chase Colton	System Administrator	
Douglas Heeren	System Administrator	

✓ Select All

The following Local Systems Bureau or Systems Planning Bureau staff needs to be added to any projects with DOT involvement or oversight. See the [Local Systems Contact Us website](#) or the [Systems Planning Staff > Grant Programs website](#) for contact information if needed.

- The appropriate regional Field Engineer (Local Systems projects)
- The appropriate regional Field Technician (Local Systems projects)
- The Grant Manager (Systems Planning projects)
- The Secondary Roads Engineer (All projects)
- The e-Construction Administrator (All projects)
- CPS Contractor Pay Finance – For county projects on the Farm-to-Market System let on or after January 2024
  - The API Access must be toggled on for this user. See the [Managing API Access](#) subsection for guidance.

To remove user(s), click on the circle on the right end of the user's respective row. It should turn green. When all desired users are selected, click "Remove Users" in the upper right corner.

The screenshot shows the 'Project Users' interface for project 86-C086-060 - 31961. The 'PROJECT SECURITY' tab is active. A message at the top states: 'All eligible user(s) have been selected for removal.' Below this is a table with columns: Name, Default Role, Project Role, and a selection column. The selection column contains a green circle with a checkmark for Nicole Moore. The 'Remove Users' button in the top right is circled in green.

Name	Default Role	Project Role	
Jennifer Basener	System Administrator		
Nicole Moore	Project Manager	<a href="#">Assign Project Role</a>	<input checked="" type="checkbox"/>
Nicole Stinn	System Administrator		
Tammi Bell	System Administrator		

Note: The "Remove Users" button will not show up if there are no eligible users to be removed.

A box will pop up asking you to confirm your choice. Click "Ok".

The screenshot shows the same 'Project Users' interface, but with a confirmation dialog box open. The dialog box text reads: 'demo2.appia.net says Are you sure you want to remove the selected users from the project?'. The 'OK' button is circled in green. The background interface shows a green message bar: 'The user has been added.' and the 'Remove Users' button is now visible.

# 14 - Exporting Data: Export Project

(System Administrator access level required.)

When a project is complete (or anytime), you can export all of the data for the project and save it to your computer. To do so, click on “Export Data” from the left menu on the My Projects page. Then click on “Export Projects” in the expanded sub-menu.

Projects

## My Projects

Find Project

Create Project Import Project

Status: Under Construction Advanced

**Under Construction**

**Pro tip:**  
Click or tap the star to add a project to your favorite projects. My Projects will default to Favorites at next login if a favorite is selected.  
[Dismiss](#)

		Description	
★		03-C003-062	+
★		STP-S-C011(71)--5E-11 - 29427	+
★	36-C036-074 JSON TEST/FINANCE	Imported	+
★	BHM-SWAP-1827(684)--SA-82-1 12345	Reconstruction Bridge Deck	+
★	BROS-C004(103)--8J-04 - 35155	On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.	+
★	BROS-C078(111)--FF-78_Payment for Multiple Sections	Letting Date 4/21/2020	+
★	BROS-C086(60)--8J-86 - 31961	Gladbrook Bridge Replacement Letting Date: October 21, 2014	+
★	BRS-C036(74)--60-36 - AcctID	Letting Date: 04/01/20	+
★	BRS-C036(74)--60-36 - AcctID_02_Central01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	+
★	BRS-C036(74)--60-36 - AcctID_03_West01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	+
★	BRS-C036(74)--60-36 - AcctID_05_West02	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	+



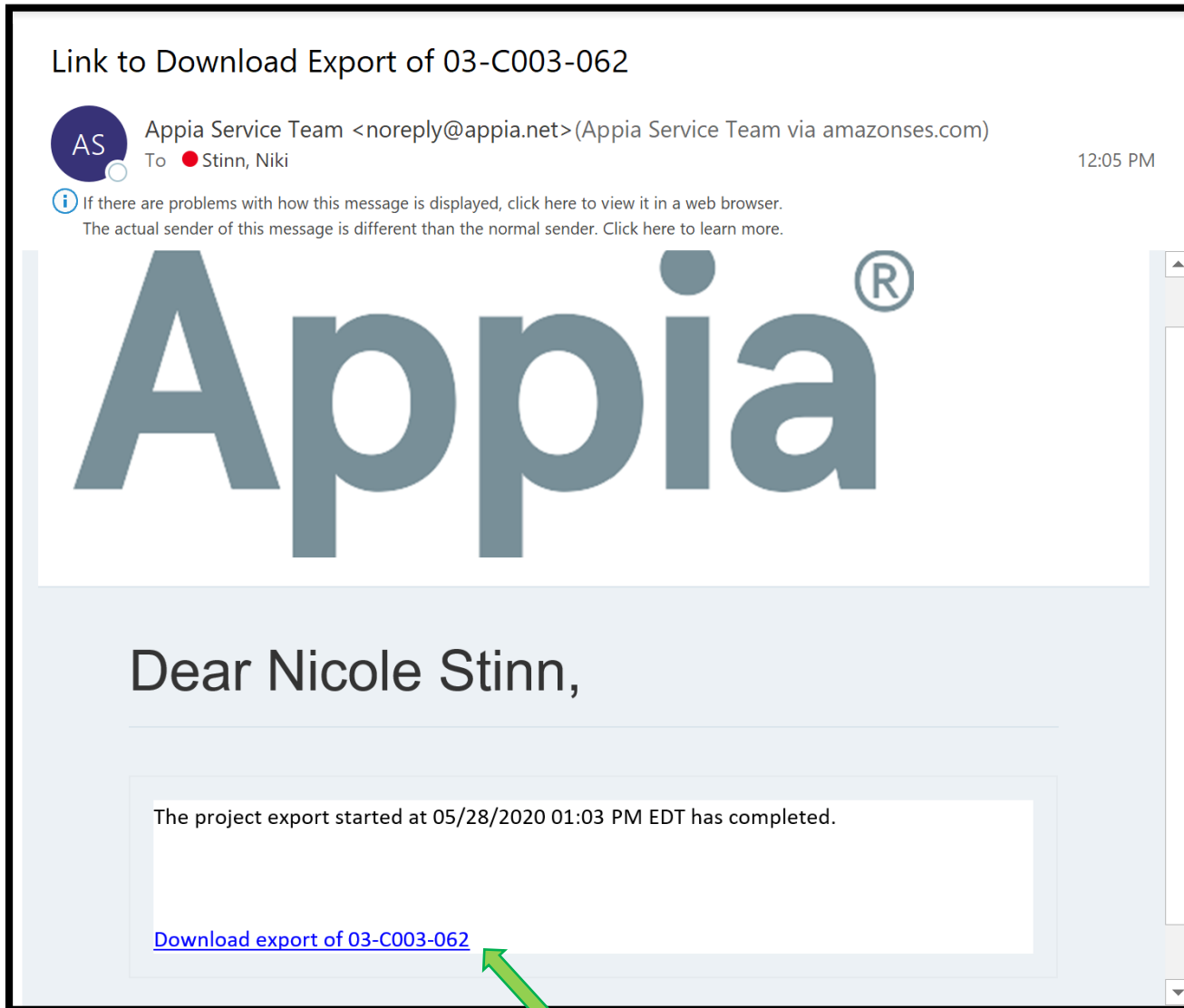
Push the “Export Project” button to download the data for the desired project. This is the blue circle with the down arrow on the right side of the line listing the project.

The screenshot displays the 'Export Projects' interface. At the top, a green ribbon contains the message: 'Export is in progress. You will receive an email with a link to download the export once it is done.' Below this, the 'Projects' section features a search bar and a table of projects. The table has three columns: 'Project ID', 'Description', and 'Project Status'. Each row includes a blue circular button with a downward arrow on the right side, which is highlighted with a green circle in the image. The left sidebar contains navigation options: 'MY PROJECTS', 'REFERENCE DATA', 'SYSTEM MGT', 'EXPORT DATA' (highlighted in red), and 'HELP'.

Project ID	Description	Project Status
03-C003-062 <small>Imported</small>	03-C003-062	Under Construction
11-C011-071 <small>Imported</small>	STP-S-C011(71)--5E-11 - 29427	Under Construction
36-C036-074 JSON TEST/FINANCE <small>Imported</small>		Under Construction
BHM-SWAP-1827(684)--SA-82-1 12345	Reconstruction Bridge Deck	Under Construction
BROS-C004(103)--8J-04 - 35155	On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.	Under Construction
BROS-C078(111)--FF-78_Payment for Multiple Sections	Letting Date 4/21/2020	Under Construction
BROS-C086(60)--8J-86 - 31961	Gladbrook Bridge Replacement Letting Date: October 21, 2014	Under Construction
BRS-C036(74)--60-36 - AcctID	Letting Date: 04/01/20	Under Construction

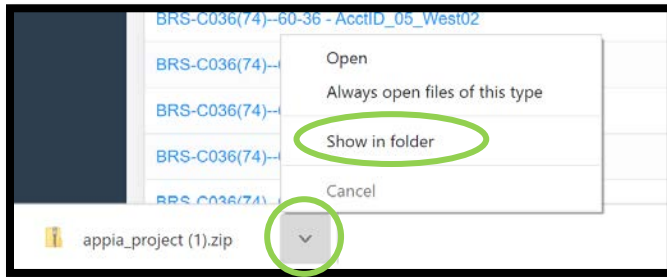
After pushing the “Export Project” button, a green ribbon will appear across the top of the screen saying that the download is in progress, and you will receive an email link once it is done.

The email will look like this.

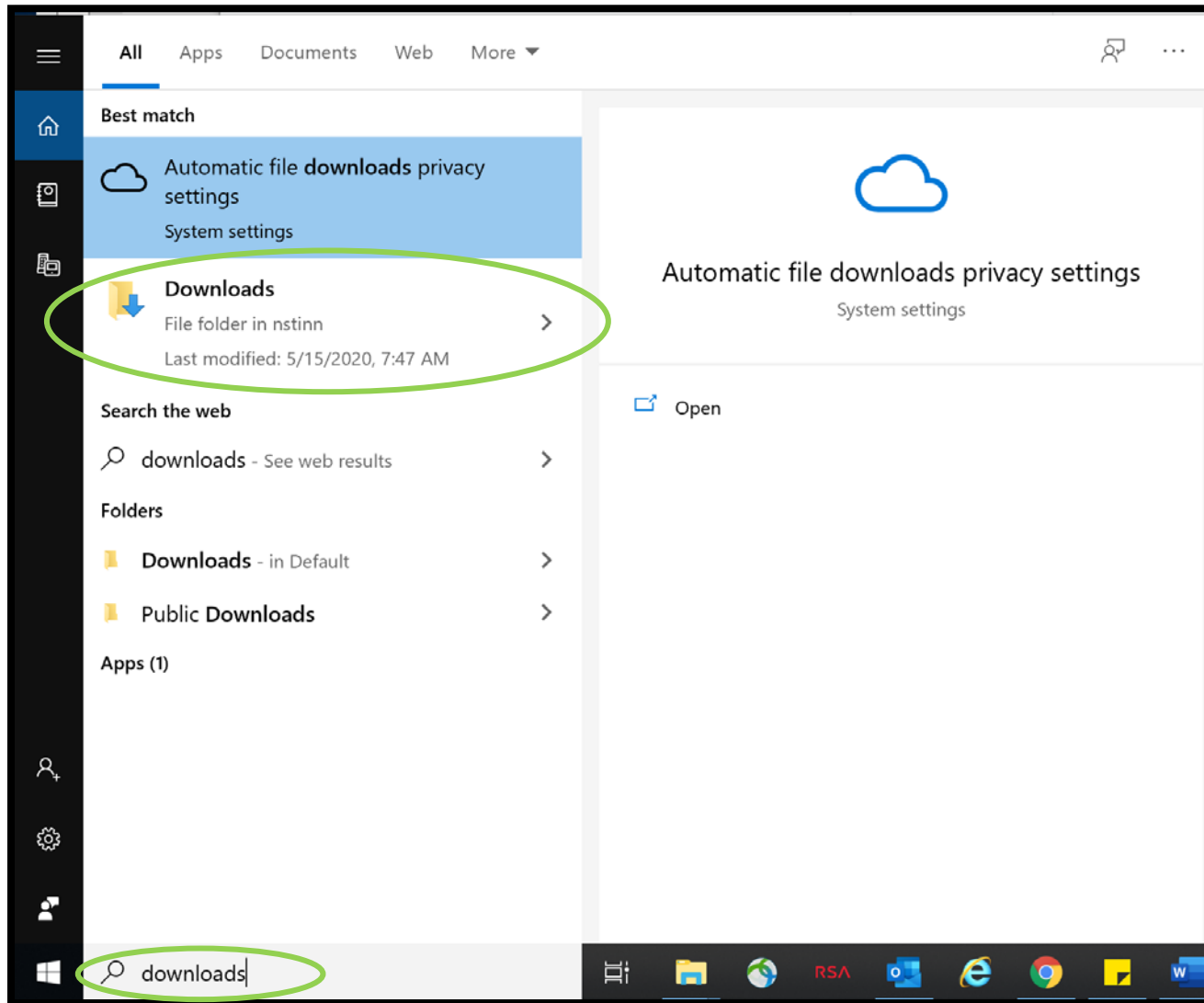


Click on the link here to download the project data.

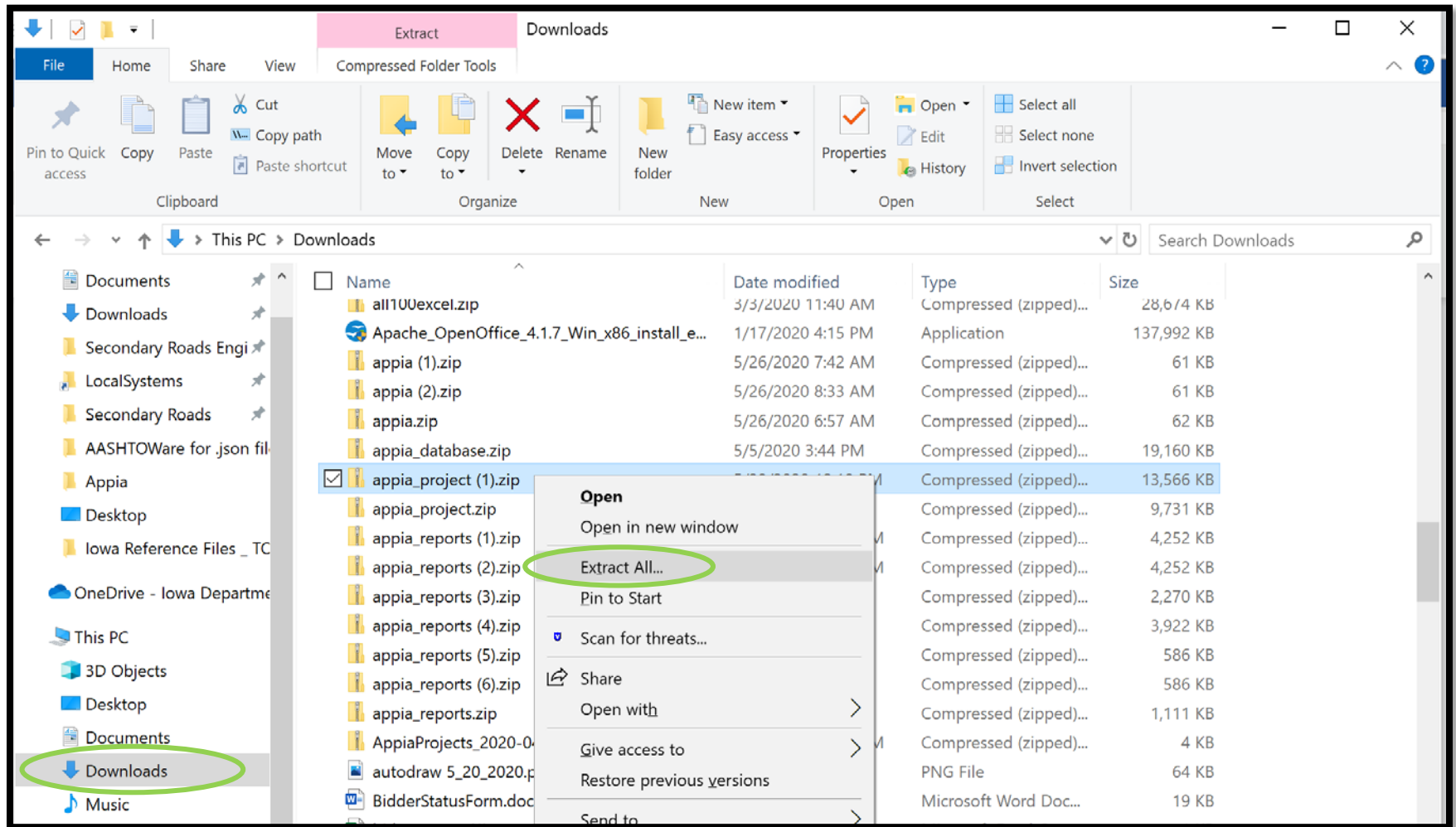
Depending on your browser, your file download may show up at the bottom like this. Click on the arrow to the right of the file name and then “Show in folder” to view the files.



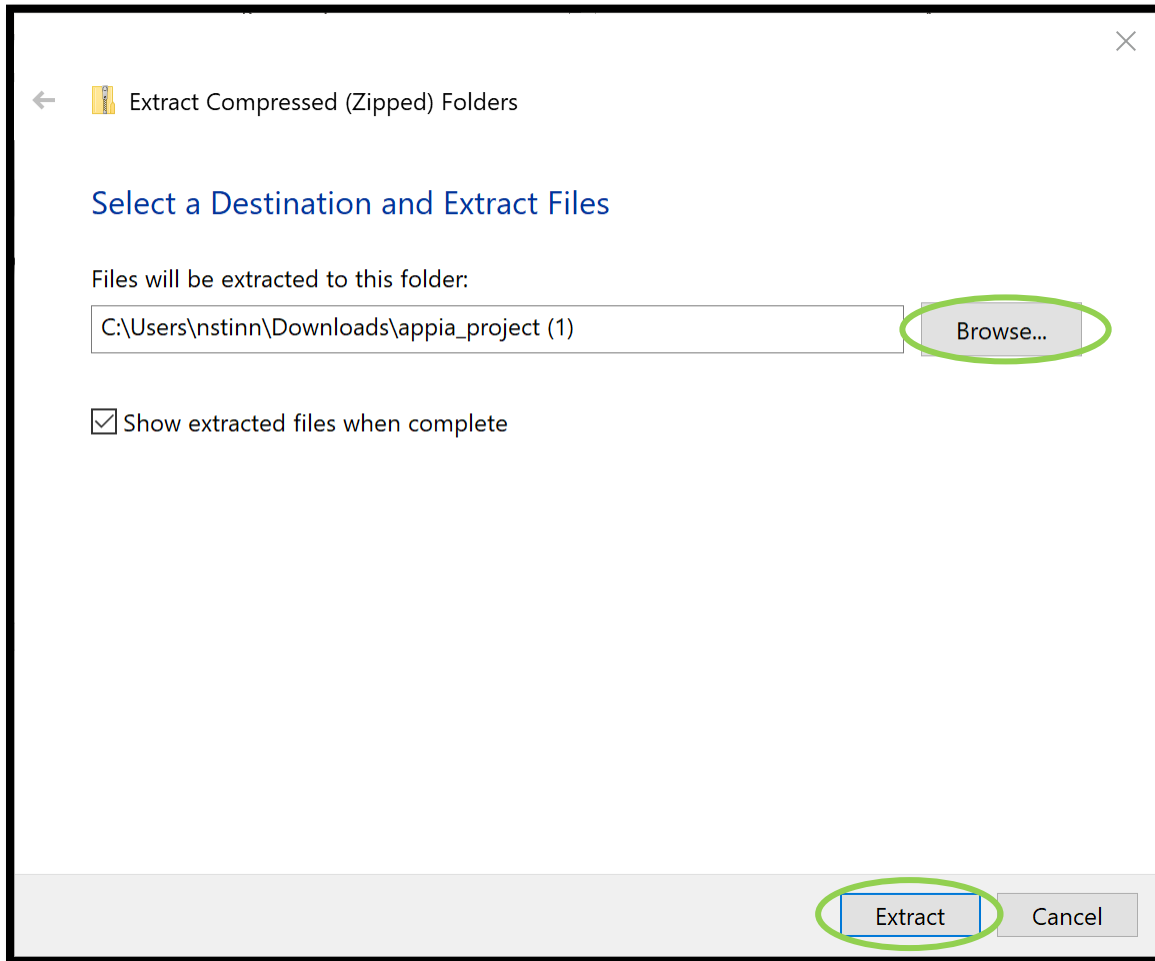
Alternately, once you have clicked on the link in the email, your zipped file can be found in the “Downloads” folder in your file explorer. The “Downloads” folder can be found by typing “downloads” in your search bar.



Whichever path is taken to download the file, you should arrive here. Right click on your file and select “Extract All...”.

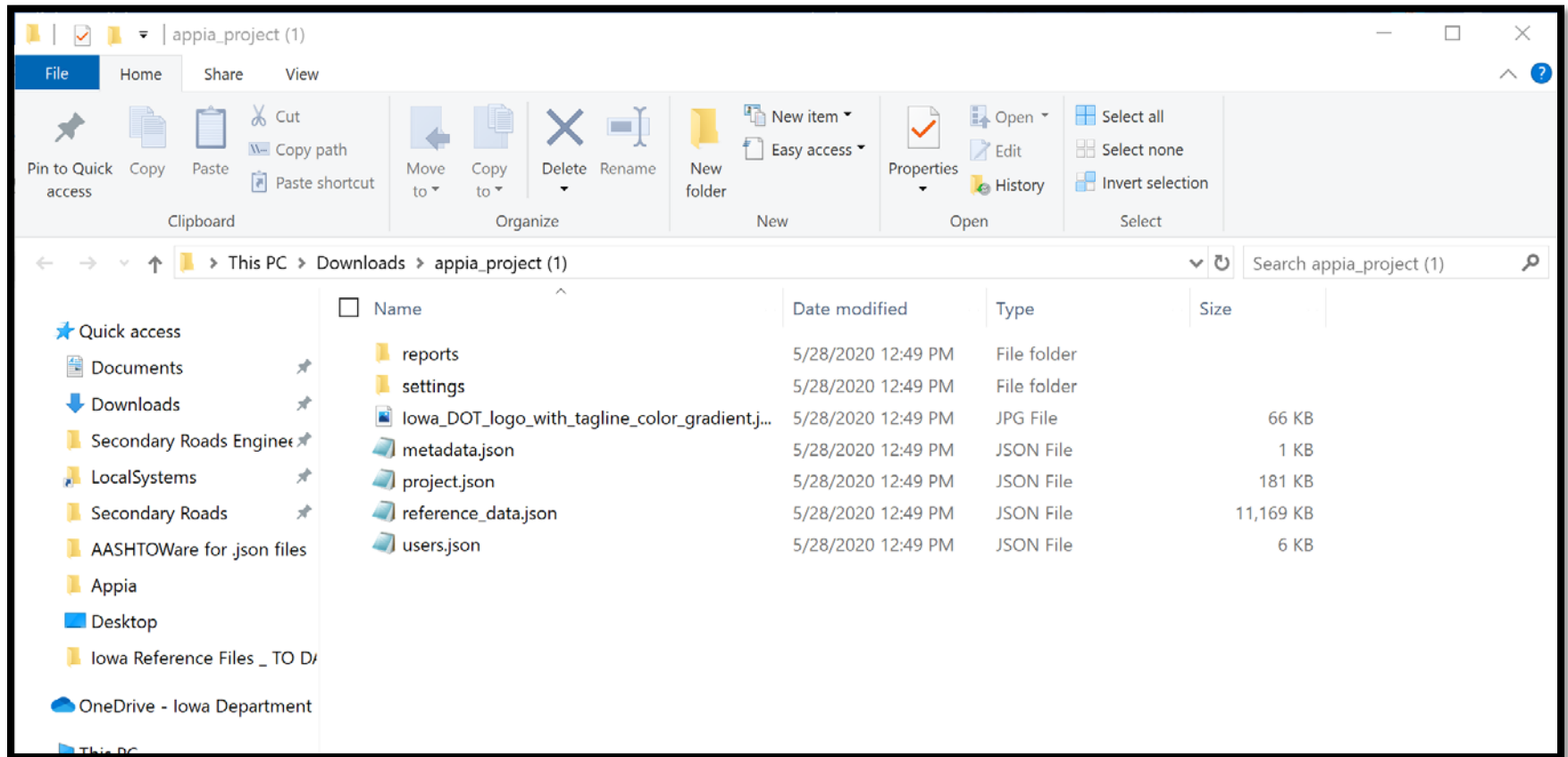


This window will pop up. Browse to find the location where you would like to save your project data.



When you have selected the appropriate file in which to save your data, click “Extract”.

A new file explorer window will open showing the folder with the extracted files.



# 15 - Exporting Data: Export Reports

(System Administrator access level required.)



You can download specific reports for any given project at any time. Available reports include:

- Change Order Details
- Daily Report\*
- Daily Diary
- Detailed Payment
- Item History
- Item Quantity Summary\*\*
- Payment Invoice
- Payment Invoice by Fund (Fund Packages Only)
- Payment Invoice (with Fund Sources)
- Time Charges
- Worksheet History

\*This export will generate a file with PDF summaries of each of the daily reports. These PDFs can be merged together if desired.

\*\* This export will generate a file with individual PDF summaries for each bid item with all of the item posting (quantity entry) information including any locations or remarks recorded. These documents will need to be uploaded to Doc Express according to the naming convention for audit/review.

To download these reports, click on “Export Data” in the left menu on the main project listing screen. Then click on “Export Reports” in the expanded sub-menu.

Export Projects

### Projects

Search for Name or Description Search

Project ID	Description	Project Status
03-C003-062 <span>Imported</span>	03-C003-062	Under Construction <span>Download</span>
11-C011-071 <span>Imported</span>	STP-S-C011(71)--SE-11 - 29427	Under Construction <span>Download</span>
36-C036-074 JSON TEST/FINANCE <span>Imported</span>		Under Construction <span>Download</span>
BHM-SWAP-1827(684)--SA-82-1 12345	Reconstruction Bridge Deck	Under Construction <span>Download</span>
BROS-C004(103)--8J-04 - 35155	On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.	Under Construction <span>Download</span>
BROS-C078(111)--FF-78_Payment for Multiple Sections	Letting Date 4/21/2020	Under Construction <span>Download</span>
BROS-C086(60)--8J-86 - 31961	Gladbrook Bridge Replacement Letting Date: October 21, 2014	Under Construction <span>Download</span>
BRS-C036(74)--60-36 - AcctID	Letting Date: 04/01/20	Under Construction <span>Download</span>
BRS-C036(74)--60-36 - AcctID_02_Central01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	Under Construction <span>Download</span>
BRS-C036(74)--60-36 - AcctID_03_West01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	Under Construction <span>Download</span>
BRS-C036(74)--60-36 - AcctID_05_West02	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	Under Construction <span>Download</span>
BRS-C036(74)--60-36 - AcctID_06_West02	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	Under Construction <span>Download</span>
BRS-C036(74)--60-36 - AcctID_07_Central01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	Under Construction <span>Download</span>
BRS-C036(74)--60-36 - AcctID_07_West02	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	Under Construction <span>Download</span>

You will be brought to this “Export Reports” screen. Select the desired project from the pull-down menu and enter the desired dates in the “Start Date” and “End Date” boxes. Reports will only be generated for the date range covered between the start and end dates entered. In the “Reports” column on the right side, check the box for any/all reports you want to be generated. Push “Export”.

The screenshot shows the 'Export Reports' interface. On the left is a dark sidebar with navigation links: MY PROJECTS, REFERENCE DATA, SYSTEM MGT, EXPORT DATA (highlighted in red), and HELP. The main content area has a title 'Export Reports' and a blue header bar with a message: 'You can only export reports for under construction projects.' Below this, there are three input fields: 'Project' (a dropdown menu showing 'BROS-C004(103)--8J-04 - 35155'), 'Start Date' (containing '05/28/2020'), and 'End Date' (containing '05/28/2020'). To the right of these fields is a list of reports under the heading '\* Reports'. The list includes: Select All, Change Order Details, Daily Report (checked), Daily Diary, Detailed Payment, Item History, Item Quantity Summary (checked), Payment Invoice, Payment Invoice By Fund (Fund Packages only), Payment Invoice (with Fund Sources), Time Charges, and Worksheet History. At the top right of the main content area are 'Export' and 'Cancel' buttons. The footer contains contact information for support@appia.net and copyright information for Info Tech, Inc., DBA Infotech.

Export Reports

You can only export reports for under construction projects.

\* Project  
BROS-C004(103)--8J-04 - 35155

\* Start Date  
05/28/2020

\* End Date  
05/28/2020

\* Reports

- ☐ Select All
- ☐ Change Order Details
- ☒ Daily Report
- ☐ Daily Diary
- ☐ Detailed Payment
- ☐ Item History
- ☒ Item Quantity Summary
- ☐ Payment Invoice
- ☐ Payment Invoice By Fund (Fund Packages only)
- ☐ Payment Invoice (with Fund Sources)
- ☐ Time Charges
- ☐ Worksheet History

support@appia.net  
(888) 352-2439

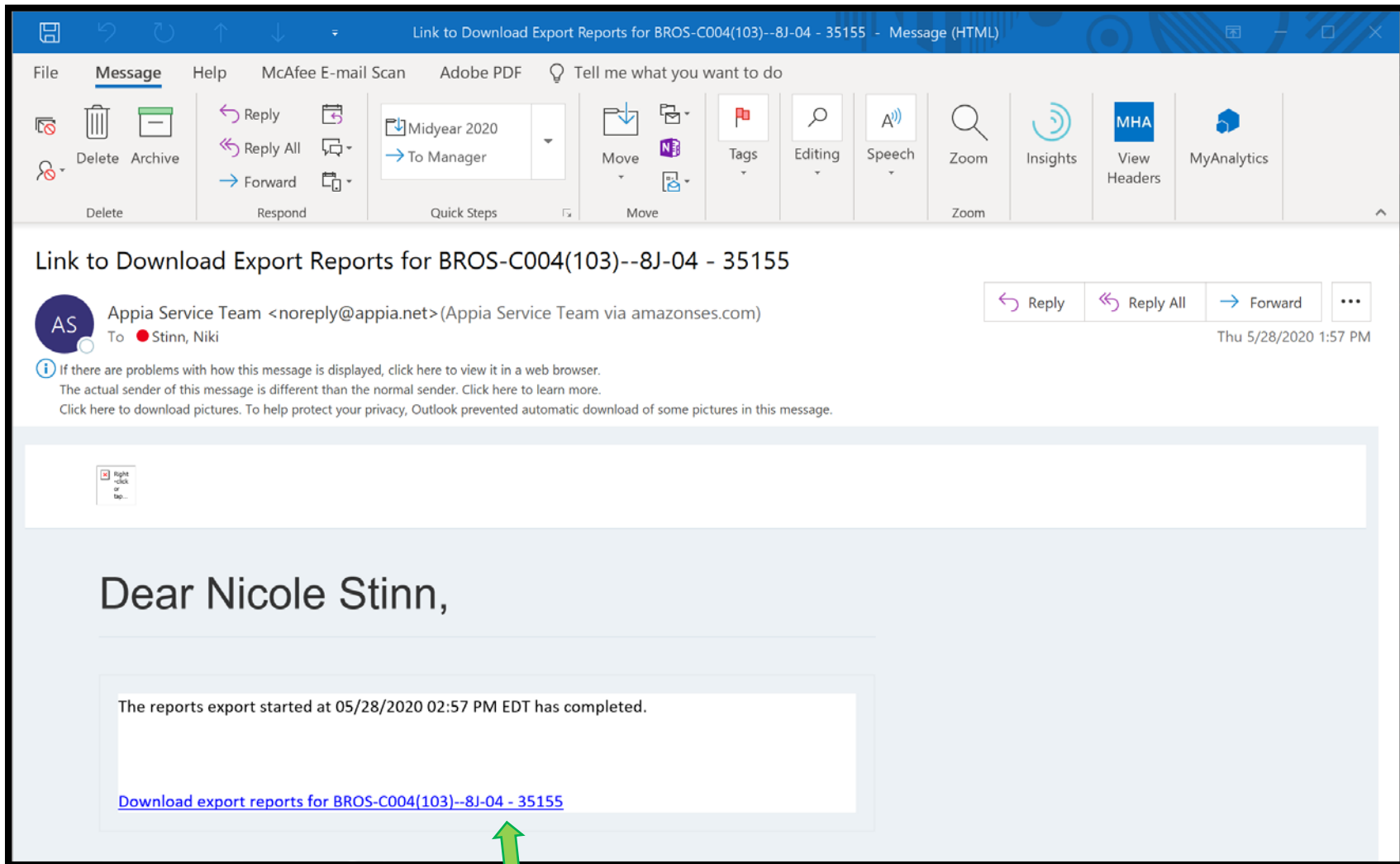
Copyright© 2020 by Info Tech, Inc., DBA Infotech InfoTech.  
Appia® is a registered trademark of Infotech  
Terms / Privacy / DMCA

You will be brought back to the project listing screen where a green ribbon will be displayed across the top saying the export is in progress and that you will receive an email with a link to download the exported reports.

The screenshot shows the 'My Projects' interface. A green banner at the top contains the message: 'Export is in progress. You will receive an email with a link to download the export once it is done.' The left sidebar includes navigation options: MY PROJECTS, REFERENCE DATA, SYSTEM MGT, EXPORT DATA, and HELP. The main content area is titled 'My Projects' and features a search bar labeled 'Find Project'. Below the search bar, a 'Pro tip' box states: 'Click or tap the star to add a project to your favorite projects. My Projects will default to Favorites at next login if a favorite is selected.' The project list is filtered by 'Under Construction' status. The table below lists several projects, including '36-C035-074 JSON TEST/FINANCE' (Imported), 'BHM-SWAP-1827(684)--SA-82-1 12345', 'BROS-C004(103)--8J-04 - 35155', 'BROS-C078(111)--FF-78\_Payment for Multiple Sections', and 'BROS-C086(60)--8J-86 - 31961'. A second 'Pro tip' box on the right says: 'Projects statuses are located here. Click or tap to select a different status than the one showing.' Buttons for 'Create Project' and 'Import Project' are in the top right, along with a status filter set to 'Under Construction' and an 'Advanced' view toggle.

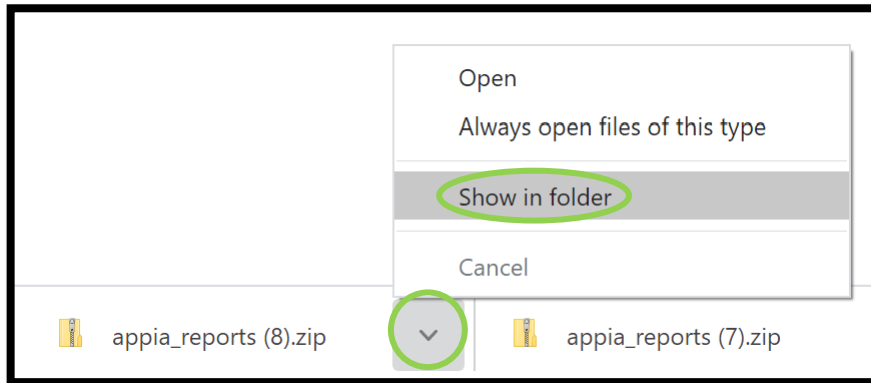
	Description	
★	03-C003-062	+
★	STP-S-C011(71)--5E-11 - 29427	+
★	36-C035-074 JSON TEST/FINANCE <span>Imported</span>	+
★	BHM-SWAP-1827(684)--SA-82-1 12345	+
★	BROS-C004(103)--8J-04 - 35155	+
★	BROS-C078(111)--FF-78_Payment for Multiple Sections	+
★	BROS-C086(60)--8J-86 - 31961	+

The email will look like this.

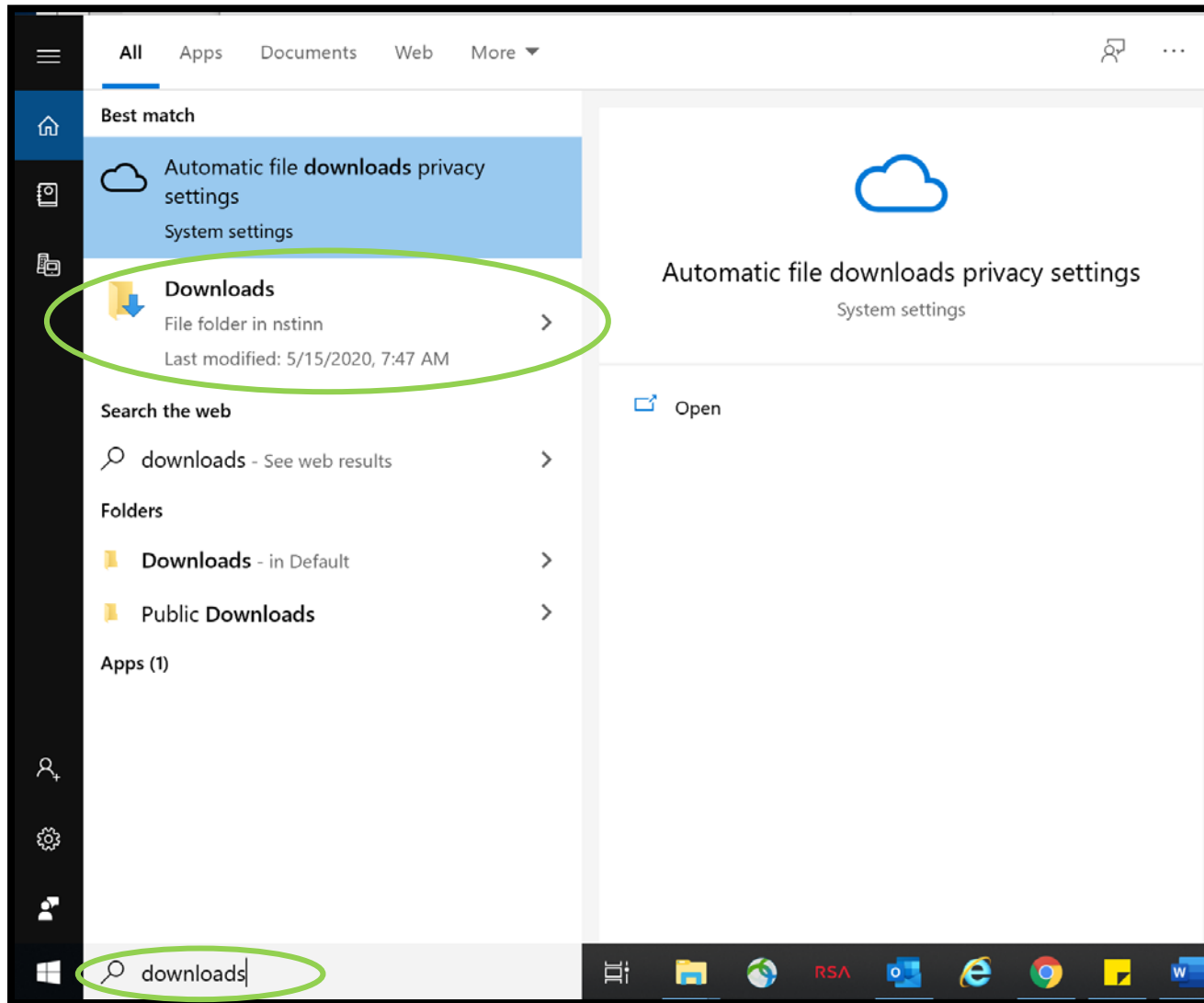


Click on the link here to download the project data.

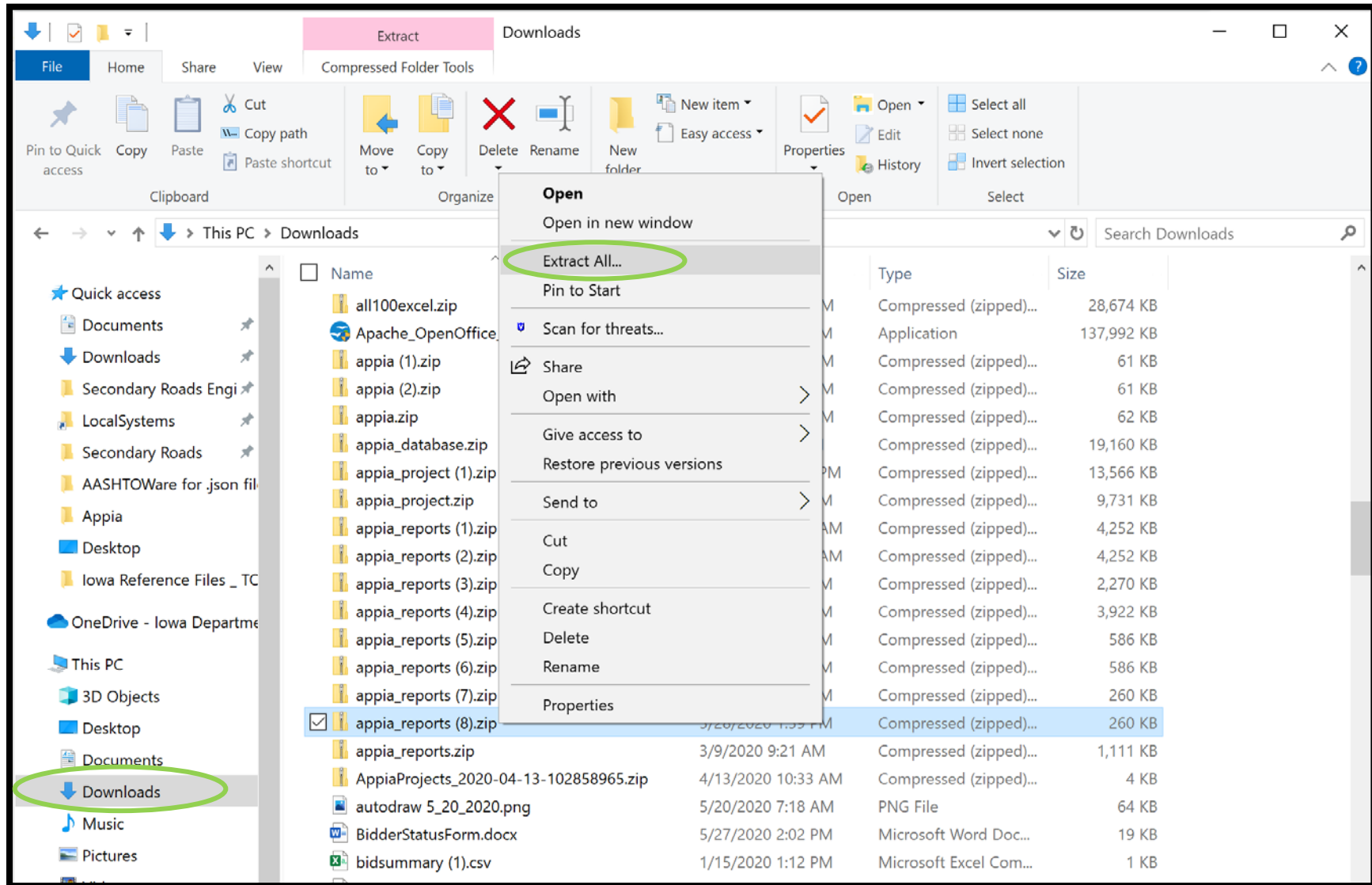
Depending on your browser, your file download may show up at the bottom like this. Click on the arrow to the right of the file name and then “Show in folder” to view the files.



Alternately, once you have clicked on the link in the email, your zipped file can be found in the “Downloads” folder in your file explorer. The “Downloads” folder can be found by typing “downloads” in your search bar.

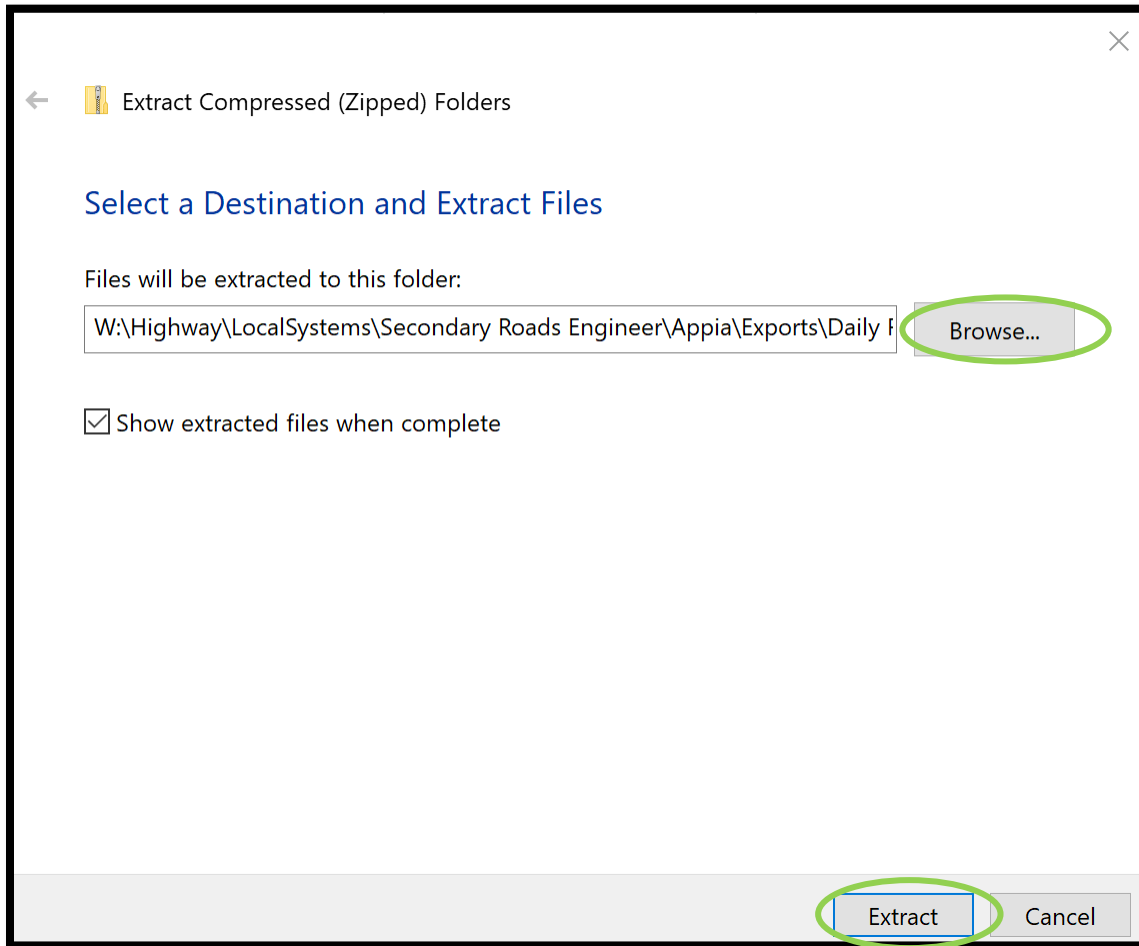


Whichever path is taken to download the file, you should arrive here. Right click on your file and select “Extract All...”.





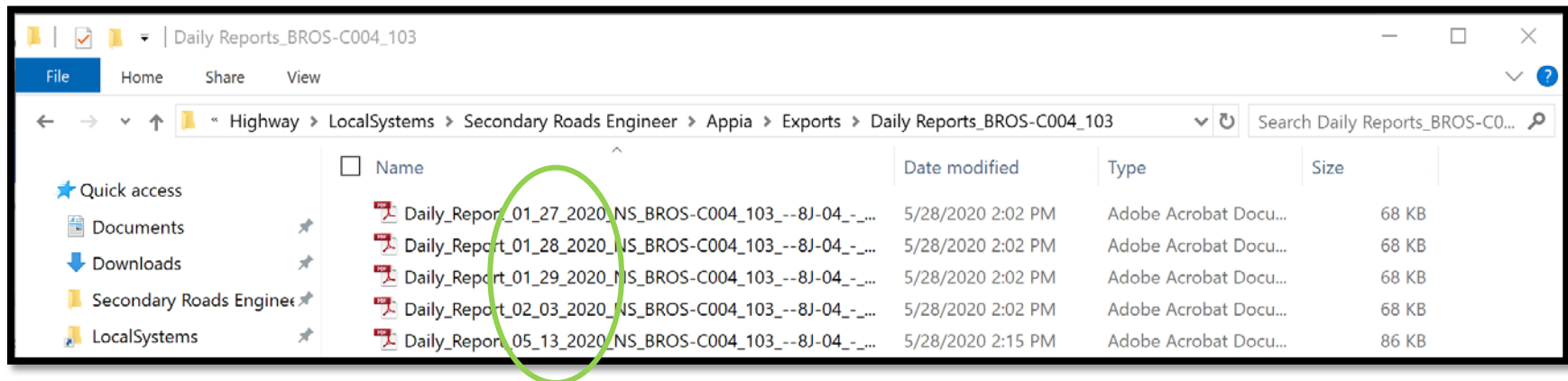
This window will pop up. Browse to find the location where you would like to save your project data.



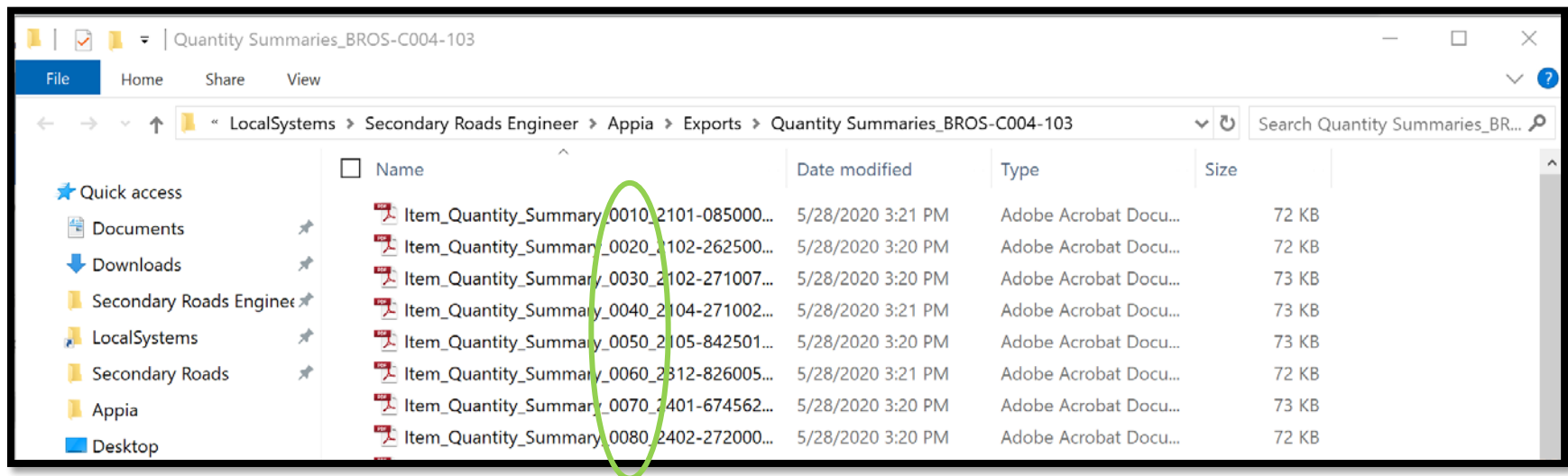
When you have selected the appropriate file in which to save your data, click “Extract”.

A new file explorer window will open showing the folder with the extracted files.

Here is a sample of the export containing the Daily Report files. Note the dates in the file names.



Here is a sample of the export containing the Daily Report files. Note the Item numbers in the file names.



A sample "Daily Report" report is shown here.

Appia®

Appanoose County Secondary Roads  
Daily Report  
BROS-C004(103)--8J-04 - 35155

Description

On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.

Report Date

05/13/2020

Prime Contractor

CUNNINGHAM-REIS, LLC  
35647 RICHLAND ROAD  
VAN METER, IA

Status

Approved

Weather

Temperature

Created By

Nicole Stinn on 05/28/2020 03:09 PM EDT

Approved By

Nicole Stinn on 05/28/2020 03:14 PM EDT

Remarks

The contractor was on site today performing Class 10 Roadway and Borrow Excavation on the northwest corner of the bridge. They also removed the east abutment.

Personnel

Crew #1 – CUNNINGHAM-REIS, LLC

Worker Type #1 (3)

10.00 hours

Worker Type #2 (1)

10.00 hours

1 crew

Equipment

Description

Active

Idle

Comments

Contractor

CUNNINGHAM-REIS, LLC

1 equipment

Daily Report:


BROS-C004(103)--8J-04 - 35155

05/28/2020

Page 1 of 2

Item Postings					
Line Number	Item ID	Unit	Unit Price	Quantity Placed	Posted Amount
Section: 0001 - ITEMS FOR A 100'-0 X 24'-6 CONTINUOUS CONCRETE SLAB BRIDGE					
0030	2102-2710070	CY	\$5,000	555.556	\$2,777.78
EXCAVATION, CL 10, RDWY+BORROW					
Contractor: CUNNINGHAM-REIS, LLC					
Funding Details					
Default Fund Package				555.556	\$2,777.78
0070	2401-6745625	LS	\$10,000,000	0.250	\$2,500.00
RMVL OF EXISTING BRIDGE					
Contractor: CUNNINGHAM-REIS, LLC					
Funding Details					
Default Fund Package				0.250	\$2,500.00
2 item postings				Total Posted Amount: \$5,277.78	

A sample "Item Quantity Summary" report is shown here. Note the remarks and location information shown. This is the most similar report in Appia to the standard DOT .xlsx "E" sheets widely used for recording quantities.



Appanoose County Secondary Roads  
Item Quantity Summary  
BROS-C004(103)--8J-04 - 35155

Project Description
On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.

Line Number
0030

Item
2102-2710070

Description
EXCAVATION, CL 10, RDWY+BORROW

Unit
CY
Unit Price
\$5.00

Original Quantity
1,600.000
Quantity Paid
0.000

Authorized Quantity
1,600.000
Quantity Placed but not Paid
1,444.445

Total Quantity Placed
1,444.445
Amount Paid
\$0.00

Quantity Remaining
155.555
Amount Unpaid
\$7,222.23

Pending Quantity
0.000
Authorized Amount
\$8,000.00

Postings

Daily Report Date	Created By	Status	Quantity Placed	Total Placed	Quantity Remaining
05/13/2020	Nicole Stumm	Approved	555.556	1,444.445	155.555
05/12/2020	Nicole Stumm	Approved	888.889	888.889	711.111
<div> Station: From 100 + 0.00 To 100 + 80.00 </div> <div> Location: 13' RT to 93' RT </div> <div> Remarks: Southwest corner of bridge. Irregular area. </div>					

2 postings

Item Quantity Summary:  
BROS-C004(103)--8J-04 - 35155

05/28/2020  
Page 1 of 1

# 16 - Mobile Inspector App: Connecting a User

(System Administrator access level required.)

Appia has a field-friendly application called Mobile Inspector 2. This application can be used in the field on a phone, tablet, or other device when access to the full Appia program is not available or is not practical.

The Mobile Inspector Installation Guide is available at <https://www.infotechinc.com/mobile-inspector/>.

The web address for the actual Mobile Inspector application is <https://mobileinspector.app/>.

Although this application is web-based, it can be used off-line. It is docked to your device screen, just like an app that is downloaded from a store (like the Google Play store). Setup and docking instructions are found in the Mobile Inspector Installation Guide referenced above.

Information from the previous Mobile Inspector app can be transferred to the new Mobile Inspector 2 web-based application by following the instructions in the Installation Guide.

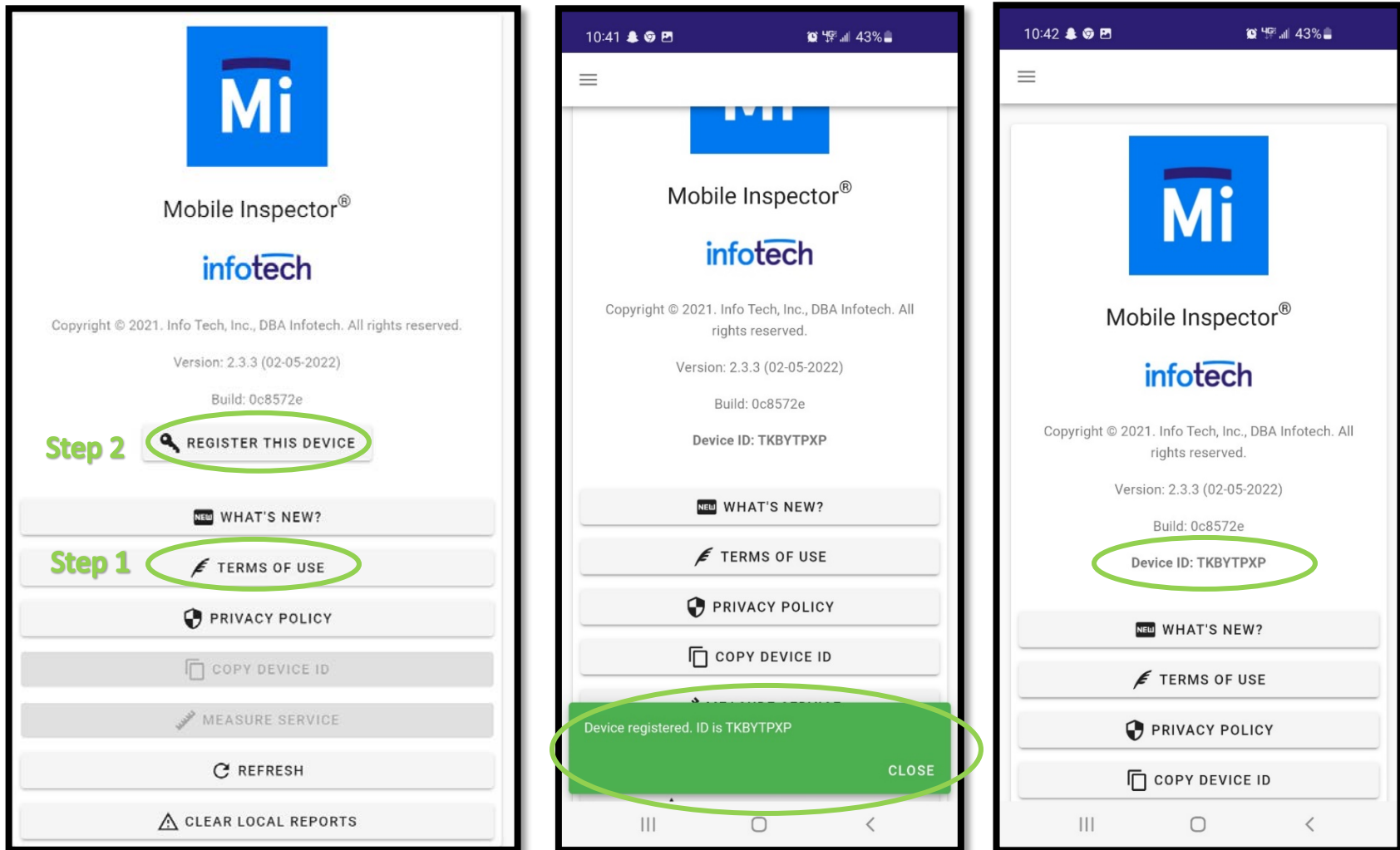
Once is application is installed, it could take up to 15 minutes for the data to sync with your account and for project information to populate.

Some of its capabilities and features in the Mobile Inspector 2 application include the ability to:

- Record daily report remarks (“daily diaries”)
  - This can be accomplished using a “voice-to-text” feature.
- Record item postings (quantity entries)
- Use the web-based app offline
  - When the user logs back into the program under a data connection, the information will sync.



To link a mobile device using Mobile Inspector 2 app to a user's account, first, download the app according to the instruction in the Installation Guide. Once the application is downloaded and has been docked on your device's screen, register the device.



When the app has finished installing on the mobile device, open it. The main screen looks like this. Take a screenshot of the “Device ID” or write it down. Alternatively, use the “Copy Device ID” button and paste the ID into an email or text. This is the ID that will need to be entered by your agency’s system administrator in a later step of this process.





Next, click on “System Management” in the left menu on the main project listing screen. Then click on “My Business” in the expanded sub-menu.

Projects

## My Projects

Find Project

Create Project Import Project

Status: Under Construction Advanced

**Under Construction**

**Pro tip:**  
Click or tap the star to add a project to your favorite projects. My Projects will default to Favorites at next login if a favorite is selected.  
[Dismiss](#)

		Description	
★	03-C003-062		+
★	STP-S-C011(71)–5E-11 - 29427		+
★	36-C036-074 JSON TEST/FINANCE Imported		+
★	BHM-SWAP-1827(684)–SA-82-1 12345	Reconstruction Bridge Deck	+
★	BROS-C004(103)–8J-04 - 35155	On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.	+
★	BROS-C078(111)–FF-78_Payment for Multiple Sections	Letting Date 4/21/2020	+
★	BROS-C086(60)–8J-86 - 31961	Gladbrook Bridge Replacement Letting Date: October 21, 2014	+
★	BRS-C036(74)–60-36 - AcctID	Letting Date: 04/01/20	+
★	BRS-C036(74)–60-36 - AcctID_02_Central01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	+
★	BRS-C036(74)–60-36 - AcctID_03_West01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	+

Find the desired user and click on the blue “Devices” link on the right side of the line listing the user’s name.

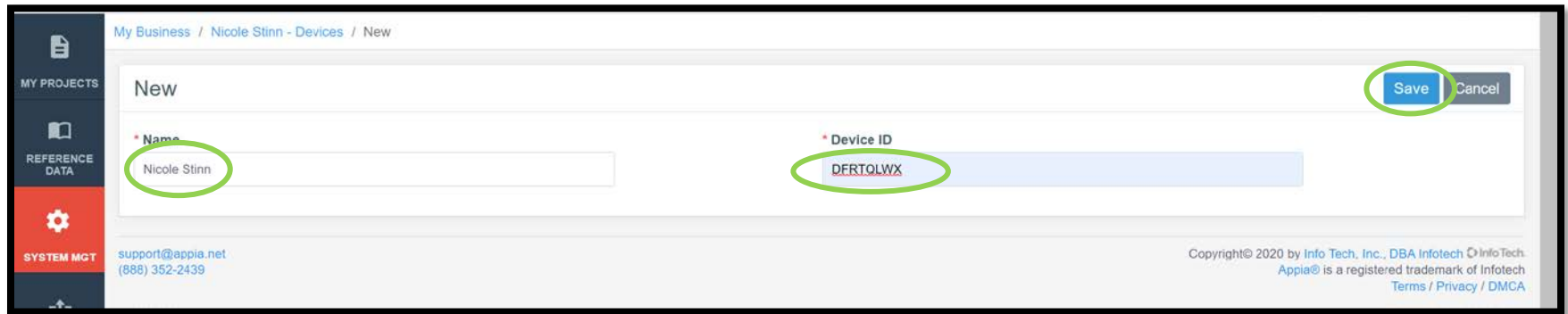
The screenshot shows the 'Users' management page. The left sidebar contains navigation options: MY PROJECTS, REFERENCE DATA, SYSTEM MGT (highlighted with a red gear icon), EXPORT DATA, and HELP. The main content area has tabs for 'USERS' and 'LICENSES'. Below the tabs, there's a header 'Users' with an 'Add Users' button. A message bar states 'You cannot remove users with devices.' Below this is a table of users:

Name	Email	Default Role	Projects	Status	Devices	
JB Jennifer Basener Infotech Iowa Agency	jennifer.basener+testinstance@infotechfl.com	System Administrator	ALL	Active	Devices	✖
NS Nicole Stinn Iowa Local Systems _DEMO ACCOUNT	niki.stinn@iowadot.us	System Administrator	ALL	Active	Devices	
s# student #1 Iowa Local Systems _DEMO ACCOUNT	student01docexpress+student#1@gmail.com	Senior Project Manager	9	Active	Devices	✖
s# student #10 Iowa Local Systems _DEMO ACCOUNT	student01docexpress+student#10@gmail.com	Senior Project Manager	9	Active	Devices	✖
s# student #11 Iowa Local Systems _DEMO ACCOUNT	student01docexpress+student#11@gmail.com	Senior Project Manager	9	Active	Devices	✖
s# student #12 Iowa Local Systems _DEMO ACCOUNT	student01docexpress+student#12@gmail.com	Senior Project Manager	9	Active	Devices	✖
s# student #13 Iowa Local Systems _DEMO ACCOUNT	student01docexpress+student#13@gmail.com	Senior Project Manager	8	Active	Devices	✖

You will be taken to this screen. Click on the “Add” button in the upper, right corner.

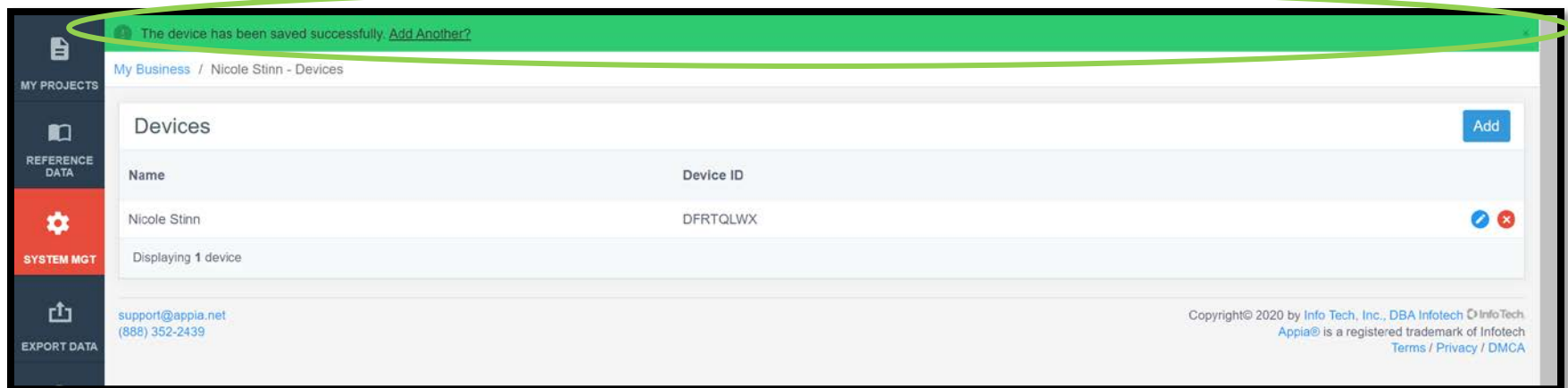
The screenshot shows the 'Devices' management page for Nicole Stinn. The left sidebar is the same as the previous screen. The main content area has a header 'Devices' and an 'Add' button in the top right corner. Below the header, there's a placeholder for a table with the text 'No devices found.'

Enter the user's name and device ID. This device ID can be found in the mobile app as shown at the beginning of this section. When finished entering the information, click "Save".



The screenshot shows the 'New' device form in the Appia web interface. The left sidebar contains navigation links: 'MY PROJECTS', 'REFERENCE DATA', 'SYSTEM MGT' (highlighted in red), and 'EXPORT DATA'. The main content area has a breadcrumb trail 'My Business / Nicole Stinn - Devices / New'. The form has two input fields: 'Name' with the value 'Nicole Stinn' and 'Device ID' with the value 'DFRTQLWX'. Both fields are circled in green. In the top right corner, the 'Save' button is also circled in green. The footer includes contact information for support@appia.net and copyright information for Info Tech, Inc.

If successful, you will be brought back to the screen below where a green ribbon will appear at the top saying the device has been added successfully.



The screenshot shows the 'Devices' list page in the Appia web interface. A green success message banner at the top reads: 'The device has been saved successfully. [Add Another?](#)'. The left sidebar is the same as the previous screenshot. The main content area has a breadcrumb trail 'My Business / Nicole Stinn - Devices'. Below the 'Devices' header, there is a table with two columns: 'Name' and 'Device ID'. The table contains one row with the values 'Nicole Stinn' and 'DFRTQLWX'. Below the table, it says 'Displaying 1 device'. In the top right corner, there is an 'Add' button. The footer is the same as the previous screenshot.

It takes about 10-15 minutes for the app on the mobile device to sync up with the Appia program.

# 17 - Reference Data: Bid Items

(System Administrator access level required.)

## A. Adding New Bid Items

To add bid items to your reference data: Click on the “Reference Data” button in the left menu bar. Then click on “Items” in the expanded menu.

The screenshot shows the 'My Projects' page in a software application. The left sidebar contains several menu items: 'MY PROJECTS', 'REFERENCE DATA', 'ITEMS', 'MATERIALS', 'ITEM MATERIALS', 'WORKSHEETS', and 'CONTRACTORS'. The 'REFERENCE DATA' and 'ITEMS' items are highlighted with green circles. The main content area is titled 'My Projects' and includes a search bar, a status filter set to 'Under Construction', and an 'Advanced' filter button. Below this, a table titled 'Under Construction' displays a list of projects. The table has two columns: 'Project ID' and 'Description'. Each row includes a star icon, a project ID, a status label (e.g., 'Imported'), and a description. A blue plus icon is visible at the end of each row.

Project ID	Description
03-C003-062 Imported	03-C003-062
11-C011-071 Imported	STP-S-C011(71)--5E-11 - 29427
36-C036-074 JSON TEST/FINANCE Imported	
BHM-SWAP-1827(684)--SA-82-1 12345	Reconstruction Bridge Deck
BROS-C004(103)--8J-04 - 35155	On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.
BROS-C078(111)--FF-78_Payment for Multiple Sections	Letting Date 4/21/2020
BRS-C036(74)--60-36 - AcctID	Letting Date: 04/01/20
BRS-C036(74)--60-36 - AcctID_02_Central01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017
BRS-C036(74)--60-36 - AcctID_03_West01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017

Option 1: To add items manually, click on the “Add” button in the top, right corner.

Reference Data / Items

### Items

Search for Item ID, Description, Unit, Fuel Factor or Asphalt Factor

Buttons: Add, Import, Export

Item ID	Description	Unit	Fuel Factor	Asphalt Factor
201-01	CLEARING AND GRUBBING	\$1,500.00	0.0000	0.0000
201-05.31	VEGETATION REMOVAL	\$2,000.00	0.0000	0.0000
201-07.01	REMOVAL AND DISPOSAL OF BRUSH & TREES	\$2,500.00	0.0000	0.0000
202-03	REMOVAL OF RIDGID PAVEMENT, SIDEWALKS, ECT.	\$10.00	0.0000	0.0000
202-03.01	REMOVAL OF ASPHALT PAVEMENT	\$10.60	0.0000	0.0000
202-03.02	REMOVAL OF RIGID PAVEMENT	\$25.00	0.0000	0.0000
202-08.15	REMOVAL OF CURB AND GUTTER (6-30)	\$4.20	0.0000	0.0000
208-01.09	Construction Layout and Topographic As-Built Survey	\$1,000.00	0.0000	0.0000
209-01.31	TEMPORARY MULCH FILTER BERM	\$250.00	0.0000	0.0000

Fill out the information for the item and click “Save”.

The “Item ID”, “Description”, and “Unit” can all be found in either your contract or the .csv bid tabulation file (if not using the .json file from Local Systems). The Item ID is the DOT’s assigned item code. Example: 2528-251800. The Description is the item’s title. Example: SAFETY CLOSURE. The Unit is the item’s unit of measure. Example: EACH.

“Asphalt Factor” and “Fuel Factor” are generally left at 0.000 unless you have a specific reason for doing otherwise.

“Worksheet” can be: 1) selected at this time, 2) associated by default to the bid item as shown in the [Reference Data: Worksheets](#) section, or 3) associated to items on a project-by-project basis.

“Include Supplemental Description” should be checked if the item has a supplement description (like a 2599 item or items where sizes are specified in the description).

“Lump Sum?” should be left **un-checked**, even if the item is a lump sum item.

Click “Save” when finished entering the necessary information.

Reference Data / Items / New

New

\* Item ID  
2303-1264347

\* Description  
ASPH BINDER, PG 64-34E+

Asphalt Factor  
0.0000

Worksheet  
\*\* None Selected \*\*

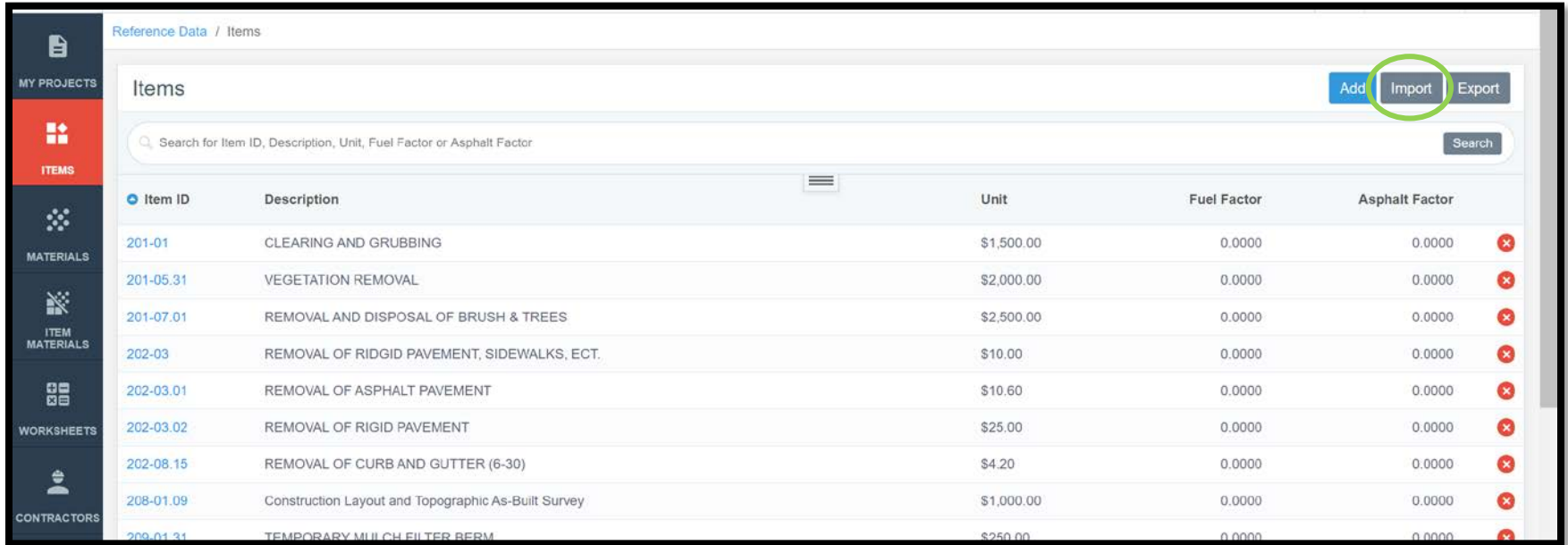
\* Unit  
TON

Options  
☒ Include Supplemental Description?  
☐ Lump Sum?

Fuel Factor  
0.0000

Save Cancel

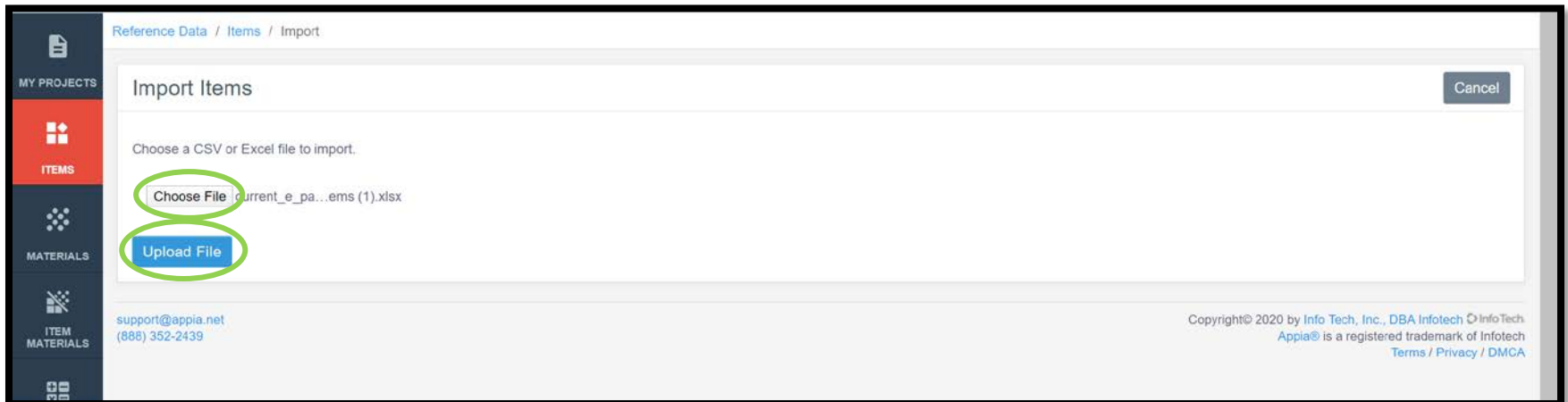
Option 2: To import a bid item list from a .csv file, click on the “Import” button in the top, right corner.



The screenshot shows the 'Items' page with a sidebar on the left containing navigation options: MY PROJECTS, ITEMS, MATERIALS, ITEM MATERIALS, WORKSHEETS, and CONTRACTORS. The main area has a breadcrumb 'Reference Data / Items' and a title 'Items'. In the top right corner, there are three buttons: 'Add', 'Import' (circled in green), and 'Export'. Below these is a search bar with the placeholder text 'Search for Item ID, Description, Unit, Fuel Factor or Asphalt Factor' and a 'Search' button. A table lists various items with columns for Item ID, Description, Unit, Fuel Factor, and Asphalt Factor. Each row ends with a red 'x' icon.

Item ID	Description	Unit	Fuel Factor	Asphalt Factor
201-01	CLEARING AND GRUBBING	\$1,500.00	0.0000	0.0000
201-05.31	VEGETATION REMOVAL	\$2,000.00	0.0000	0.0000
201-07.01	REMOVAL AND DISPOSAL OF BRUSH & TREES	\$2,500.00	0.0000	0.0000
202-03	REMOVAL OF RIDGID PAVEMENT, SIDEWALKS, ECT.	\$10.00	0.0000	0.0000
202-03.01	REMOVAL OF ASPHALT PAVEMENT	\$10.60	0.0000	0.0000
202-03.02	REMOVAL OF RIGID PAVEMENT	\$25.00	0.0000	0.0000
202-08.15	REMOVAL OF CURB AND GUTTER (6-30)	\$4.20	0.0000	0.0000
208-01.09	Construction Layout and Topographic As-Built Survey	\$1,000.00	0.0000	0.0000
209-01.31	TEMPORARY MULCH FILTER BERM	\$250.00	0.0000	0.0000

Click on the “Choose File” button to browse for the appropriate file to import from your computer. Once the file is selected, click “Upload”.



The screenshot shows the 'Import Items' page with a sidebar on the left containing navigation options: MY PROJECTS, ITEMS, MATERIALS, ITEM MATERIALS, WORKSHEETS, and CONTRACTORS. The main area has a breadcrumb 'Reference Data / Items / Import' and a title 'Import Items'. Below the title is a 'Cancel' button. The text 'Choose a CSV or Excel file to import.' is followed by a file selection area showing 'Choose File' (circled in green) and 'Upload File' (circled in green) buttons. The file name 'current\_e\_pa...ems (1).xlsx' is visible. At the bottom, there is contact information for support@appia.net and a copyright notice for Info Tech, Inc., DBA Infotech.

support@appia.net  
(888) 352-2439

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## B. Removing “Lump Sum” Designations

Because of the way the Iowa DOT Reference Data was originally set up, most Lump Sum items will show “Lump Sum” as “Yes” (non-editing screen) and have the “Lump Sum” box checked (editing screen) as shown below. This designation interferes with some of the payment and close-out processes for Iowa DOT-administered project. Therefore, the “Lump Sum” designation needs to be removed.

Note: Once a Lump Sum designation has been removed from an item in the Reference Data, it will remain that way until it is manually changed back. Therefore, you should only have to follow this process the first time you encounter each Lump Sum item on a contract.

Reference Data / Items / 2528-8445110

---

2528-8445110 Edit

---

Description	Lump Sum?
TRAFFIC CONTROL	Yes
Unit	Asphalt Factor
LS	0.0000
Include Supplemental Description?	Fuel Factor

Reference Data / Items / 2528-8445110

---

Edit Save Cancel

---

* Item ID	* Unit
2528-8445110	LS
* Description	Options
TRAFFIC CONTROL	<input type="checkbox"/> Include Supplemental Description?
	<input checked="" type="checkbox"/> Lump Sum?
Asphalt Factor	Fuel Factor
0.0000	0.0000
Worksheet	
** None Selected **	

To remove the “Lump Sum” designation from an item, click on the “Reference Data” button in the left menu bar. Then click on “Items” in the expanded menu.

The screenshot shows the 'My Projects' page in a software application. The left sidebar contains several menu items: 'MY PROJECTS', 'REFERENCE DATA', 'ITEMS', 'MATERIALS', 'ITEM MATERIALS', 'WORKSHEETS', and 'CONTRACTORS'. The 'REFERENCE DATA' and 'ITEMS' items are highlighted with red circles. The main content area is titled 'My Projects' and includes a search bar labeled 'Find Project'. Below the search bar, there is a section titled 'Under Construction' which contains a table of projects. The table has two columns: 'Project ID' and 'Description'. The projects listed are:

Project ID	Description
03-C003-062 <small>Imported</small>	03-C003-062
11-C011-071 <small>Imported</small>	STP-S-C011(71)–5E-11 - 29427
36-C036-074 JSON TEST/FINANCE <small>Imported</small>	
BHM-SWAP-1827(684)–SA-82-1 12345	Reconstruction Bridge Deck
BROS-C004(103)–8J-04 - 35155	On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.
BROS-C078(111)–FF-78_Payment for Multiple Sections	Letting Date 4/21/2020
BRS-C036(74)–60-36 - AcctID	Letting Date: 04/01/20
BRS-C036(74)–60-36 - AcctID_02_Central01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017
BRS-C036(74)–60-36 - AcctID_03_West01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017

In the Items screen that appears, search for the desired Lump Sum item in the search bar at the top. The easiest way to find the item is to search by item ID. Once you've typed in your item ID or other item identifier, hit Enter or click the gray Search button on the right end of the search line.

Reference Data / Items

Items

Add Import Export

2401-6745625 Search

Item ID	Description	Unit	Fuel Factor	Asphalt Factor
201-01	CLEARING AND GRUBBING	\$1,500.00	0.0000	0.0000
201-05.31	VEGETATION REMOVAL	\$2,000.00	0.0000	0.0000
201-07.01	REMOVAL AND DISPOSAL OF BRUSH & TREES	\$2,500.00	0.0000	0.0000
202-03	REMOVAL OF RIDGID PAVEMENT, SIDEWALKS, ECT.	\$10.00	0.0000	0.0000

The search should return a screen with your item. Click on the blue item number on the left end of the line to open the item.

Reference Data / Items

Items

Add Import Export

2401-6745625 Search

Item ID	Description	Unit	Fuel Factor	Asphalt Factor
2401-6745625	RMVL OF EXISTING BRIDGE	LS	0.0000	0.0000

Displaying 1 item

Click on the blue Edit button in the upper right corner.

Reference Data / Items / 2401-6745625

2401-6745625

**Description**  
RMVL OF EXISTING BRIDGE

**Unit**  
LS

**Include Supplemental Description?**  
No

**Worksheet**  
None

**Lump Sum?**  
Yes

**Asphalt Factor**  
0.0000

**Fuel Factor**  
0.0000

**Edit**

Now the editing screen should be open. There will be a check box to the right of “Lump Sum?” containing a check mark highlighted in blue. Remove the check mark by clicking on it. Then click the blue “Save” button in the upper right corner.

Reference Data / Items / 2401-6745625

**Edit**

**\* Item ID**  
2401-6745625

**\* Description**  
RMVL OF EXISTING BRIDGE

**Asphalt Factor**  
0.0000

**Worksheet**  
\*\* None Selected \*\*

**\* Unit**  
LS

**Options**  
☐ Include Supplemental Description?  
☒ Lump Sum?

**Fuel Factor**  
0.0000

**Save** **Cancel**

Repeat this process as necessary for all of the Lump Sum items in the contract.

### C. [Resolving Bid Item Related Import Errors for Method 1 .csv Imports](#)

If you try importing bid items and get this error message, it means that one or more of the bid items are not in your reference data library. You will need to add them. The error message tells you what rows of the .csv file are not being imported. This row count includes the header line. Look at your .csv file to figure out which items need to be created. Refer to Section [A. Adding New Bid Items](#) for guidance on how to add bid items to your reference data.

The screenshot displays the Appia software interface. On the left is a dark blue sidebar with navigation icons and labels: OVERVIEW, ALL REPORTS, ITEMS (highlighted in red), TIME LIMITS, FUNDING, and MORE. The main content area has a breadcrumb trail: Projects / Winnebago Multiple Sections / Items. Below this is the title 'Winnebago Multiple Sections' with a 'New' tag and the text 'February Letting: 02/18/20'. A red banner with a white exclamation mark icon contains the error message: 'Import error: The import couldn't be completed because the following rows contain errors. Please fix the errors and try the import again. Item ID is not a reference item: Rows 5 and 64'. To the right of the banner are 'Edit', 'Import', and 'Export' buttons. Below the banner is a table placeholder with the text 'No items found.' at the bottom. The footer includes contact information 'support@appia.net (888) 352-2439' and copyright information 'Copyright© 2020 by Info Tech, Inc., DBA Infotech'.

#### D. Resolving Bid Item Related Import Errors for Method 2 .json Imports

When importing a .json file, you may encounter an error message in a red ribbon that says, “The project couldn’t be imported because the JSON file contains errors. Please fix the errors and try the import again. [Show Errors](#)”. If you encounter this message, click on “[Show Errors](#)”.

The screenshot shows the 'My Projects' interface. A red ribbon message at the top states: "The project couldn't be imported because the JSON file contains errors. Please fix the errors and try the import again. [Show Errors](#)". The 'Show Errors' link is circled in green. Below the message is a table of projects.

Project ID	Description
01-C001-118 <small>Imported</small>	BROS-SWAP-C001(118)–SE-01, Acct ID- 38903, Letting Date- November 15, 2022
02-C002-079 <small>Imported</small>	FM-C002(79)–55-02, Acct ID- 38469, Letting Date- March 15, 2022
04-C004-114 <small>Imported</small>	FM-C004(114)–55-04, AcctID- 37855, Letting Date- 20 July 2021

When you click on “[Show Errors](#)”, the red ribbon will expand downward, and the specific errors will be listed. If one of the errors says, “Item xxxx-xxxxxxx (UNIT) does not exist in the reference data.”, then that item is missing from your reference data set. You need to add it. Refer to Section [A. Adding New Bid Items](#) for guidance on how to add the item.

The screenshot shows the 'My Projects' interface with the red ribbon message expanded. The message now includes two specific errors: "Item 2528-2518000 (EACH) does not exist in the reference data." and "The item total doesn't match the awarded amount." Below the errors is the same table of projects as in the previous screenshot.

Project ID	Description
01-C001-118 <small>Imported</small>	BROS-SWAP-C001(118)–SE-01, Acct ID- 38903, Letting Date- November 15, 2022
02-C002-079 <small>Imported</small>	FM-C002(79)–55-02, Acct ID- 38469, Letting Date- March 15, 2022

Note: The error saying, “The item total doesn’t match the awarded amount.” will automatically resolve once all missing bid items are entered into the reference data.

# 18 - Reference Data: Worksheets

(System Administrator access level required.)

Worksheets are calculation-based files that compute an item's quantity when the user enters dimensions and measurements when performing an item posting (entering quantity for an item). More information on using worksheets can be found in the instruction manual for projects under construction.

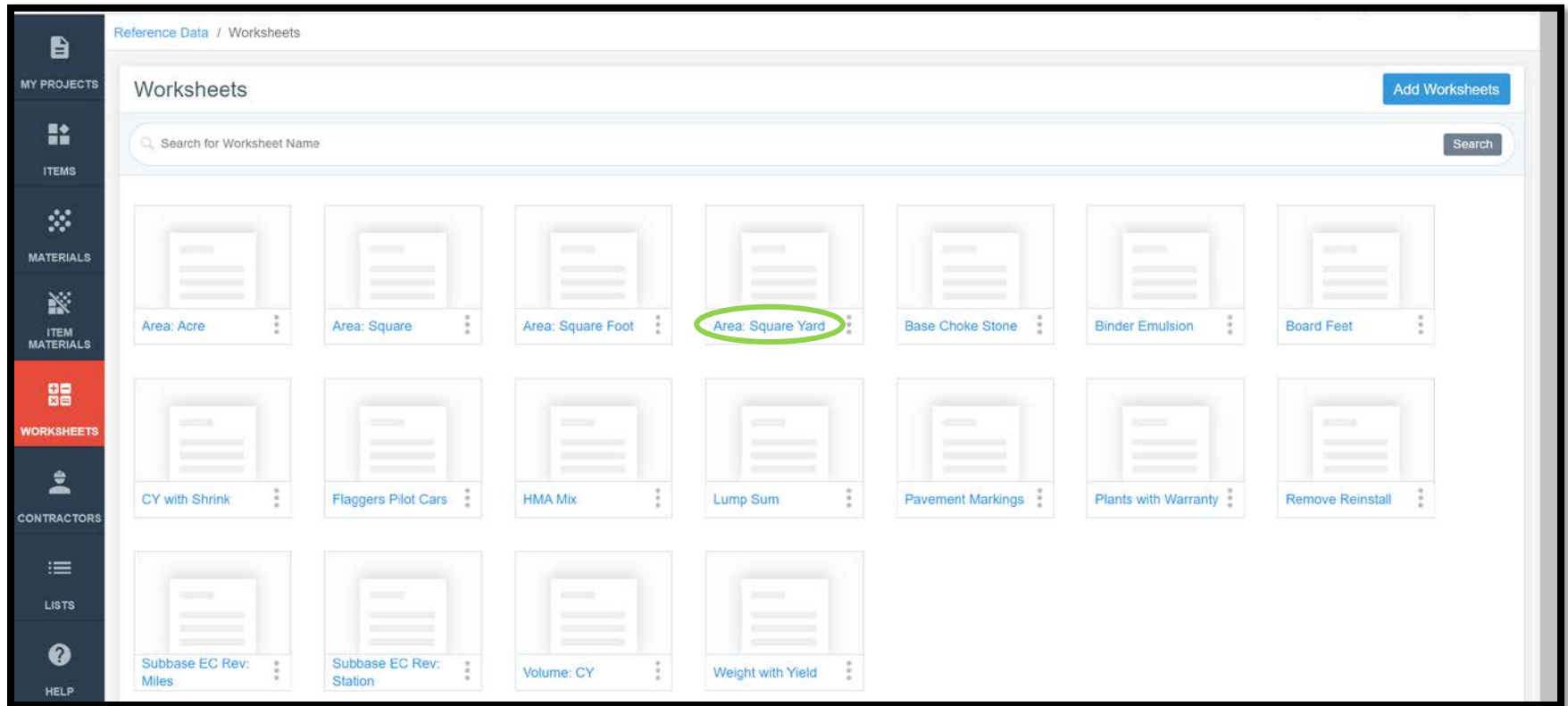
To access the worksheets, first, begin on the main project listing screen. Then click on the "Reference Data" button in the left menu and then clicking on "Worksheets" in the expanded menu.

The screenshot shows the 'My Projects' interface. The left sidebar contains a menu with 'REFERENCE DATA' and 'WORKSHEETS' highlighted with green circles. The main content area shows a table of projects under construction.

Project ID	Description
03-C003-062 <small>Imported</small>	03-C003-062
11-C011-071 <small>Imported</small>	STP-S-C011(71)--5E-11 - 29427
36-C036-074 JSON TEST/FINANCE <small>Imported</small>	
BHM-SWAP-1827(684)--SA-82-1 12345	Reconstruction Bridge Deck
BROS-C004(103)--8J-04 - 35155	On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.
BROS-C078(111)--FF-78_Payment for Multiple Sections	Letting Date 4/21/2020
BROS-C086(60)--8J-86 - 31961	Gladbrook Bridge Replacement Letting Date: October 21, 2014
BRS-C036(74)--60-36 - AcctID	Letting Date: 04/01/20
BRS-C036(74)--60-36 - AcctID_02_Central01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017
BRS-C036(74)--60-36 - AcctID_03_West01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017
BRS-C036(74)--60-36 - AcctID_05_West02	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017
BRS-C036(74)--60-36 - AcctID_06_West02	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017



You will be brought to the following screen. These are the worksheets currently present for use in Appia. In order for a worksheet to be used for quantity calculations in item postings, it must first be associated with a bid item. To see what items are currently associated with any given worksheet, click on the name of the worksheet.



Note: You can elect to assign worksheets on a project-by-project basis rather than setting up global defaults here if desired.

A screen will appear listing all of the items in the reference data that are currently associated with the worksheet.

To associate the worksheet with additional bid items, click “Associate Items” in the top, right corner.

Reference Data / Worksheets / Area: Square Yard

### Area: Square Yard Item Association

0 eligible item(s) have been selected for removal from worksheet. [Select all eligible items?](#)

Area: Square Yard  
length \* width / 9

Length (FT) Width (FT)

Search for Item ID, Description or Unit Search

Item ID	Description	Unit	Select All
2111-8174200	GRANULAR SUBBASE, PLACE ONLY	SY	<input checked="" type="checkbox"/>
2122-5190007	PAVED SHOULDER, P.C. CONCRETE, 7 IN.	SY	<input checked="" type="checkbox"/>
2122-5190009	PAVED SHOULDER, P.C. CONCRETE, 9 IN.	SY	<input checked="" type="checkbox"/>
2214-5145150	PAV'T, SCARIFICATION	SY	<input checked="" type="checkbox"/>

Displaying all 4 items

If you are seeking to only associate the worksheet to one particular bid item, enter the name of the bid item in the search bar and click “Search”. (Keep the name as generic as possible to give the best chance at finding the item.) If you are seeking to associate the worksheet with all items having units that match the worksheet or just want a list of items with matching units to search, type the units into the search bar and click “Search”. (Use abbreviations for units like SY, CY, LS.)



Reference Data / Worksheets / Area: Square Yard

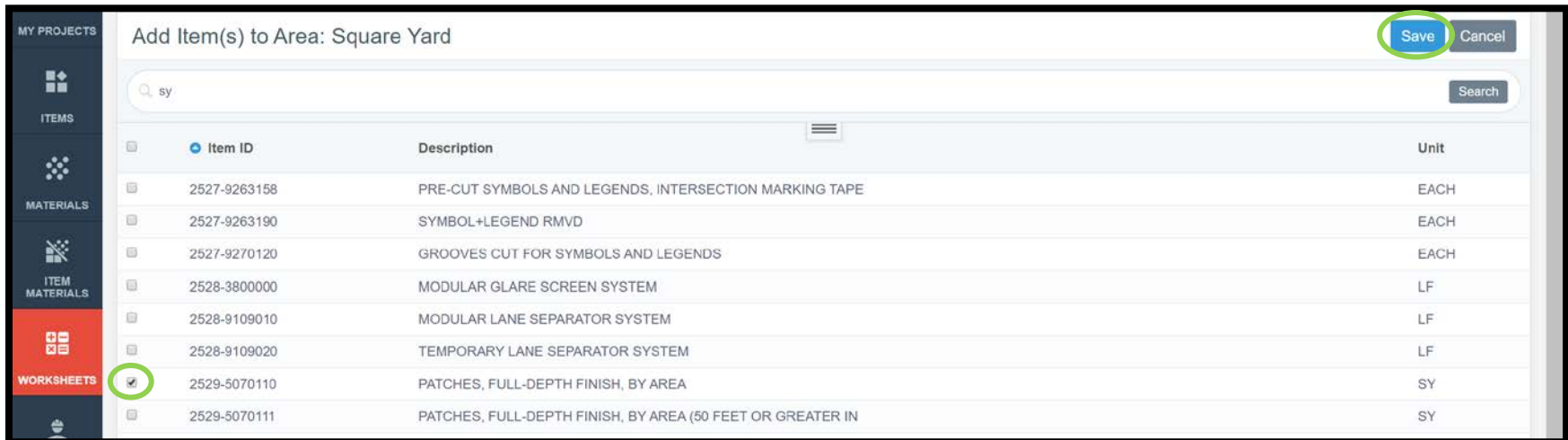
Add Item(s) to Area: Square Yard

Search for Item ID, Description or Unit

Search

Item ID	Description	Unit
201-05.31	VEGETATION REMOVAL	\$2,000.00
201-07.01	REMOVAL AND DISPOSAL OF BRUSH & TREES	\$2,500.00
202-03	REMOVAL OF RIDGID PAVEMENT, SIDEWALKS, ECT.	\$10.00
202-03.01	REMOVAL OF ASPHALT PAVEMENT	\$10.60

Click on the box to the left of the item’s line to select the desired items or on the box in the header at the top of the column to select all items. Click “Save” in the upper, right corner when all desired items have been selected.



Add Item(s) to Area: Square Yard

sy

Search

Save Cancel

Item ID	Description	Unit
2527-9263158	PRE-CUT SYMBOLS AND LEGENDS, INTERSECTION MARKING TAPE	EACH
2527-9263190	SYMBOL+LEGEND RMVD	EACH
2527-9270120	GROOVES CUT FOR SYMBOLS AND LEGENDS	EACH
2528-3800000	MODULAR GLARE SCREEN SYSTEM	LF
2528-9109010	MODULAR LANE SEPARATOR SYSTEM	LF
2528-9109020	TEMPORARY LANE SEPARATOR SYSTEM	LF
2529-5070110	PATCHES, FULL-DEPTH FINISH, BY AREA	SY
2529-5070111	PATCHES, FULL-DEPTH FINISH, BY AREA (50 FEET OR GREATER IN	SY

If the association was successful, a green ribbon will appear at the top of the screen, and the item will be shown in the list of associated items.

The worksheet has been updated.

Reference Data / Worksheets / Area: Square Yard

### Area: Square Yard Item Association

Associate Items Disassociate Items

0 eligible item(s) have been selected for removal from worksheet. [Select all eligible items?](#)

Area: Square Yard  
length \* width / 9

Length (FT) Width (FT)

Search for Item ID, Description or Unit Search

Item ID	Description	Unit	Select All
<a href="#">2111-8174200</a>	GRANULAR SUBBASE, PLACE ONLY	SY	<input checked="" type="checkbox"/>
<a href="#">2116-0000100</a>	FULL DEPTH RECLAMATION	SY	<input checked="" type="checkbox"/>
<a href="#">2122-5190007</a>	PAVED SHOULDER, P.C. CONCRETE, 7 IN.	SY	<input checked="" type="checkbox"/>
<a href="#">2122-5190009</a>	PAVED SHOULDER, P.C. CONCRETE, 9 IN.	SY	<input checked="" type="checkbox"/>
<a href="#">2214-5145150</a>	PAV'T, SCARIFICATION	SY	<input checked="" type="checkbox"/>
<a href="#">2529-5070110</a>	PATCHES, FULL-DEPTH FINISH, BY AREA	SY	<input checked="" type="checkbox"/>
<a href="#">2599-9999018</a>	('SQUARE YARDS' ITEM)	SY	<input checked="" type="checkbox"/>

Displaying all 7 items

To remove an association, click on the gray circle on the right side of the bid item's line. It will turn green. Select the "Disassociate Items" button in the top right corner.

Reference Data / Worksheets / Area: Square Yard

### Area: Square Yard Item Association

Associate Items | **Disassociate Items**

1 eligible item(s) have been selected for removal from worksheet. [Select all eligible items?](#)

Area: Square Yard  
length \* width / 9

Length (FT) Width (FT)

Search for Item ID, Description or Unit Search

Item ID	Description	Unit	Select All
2111-8174200	GRANULAR SUBBASE, PLACE ONLY	SY	<input checked="" type="checkbox"/>
2122-5190007	PAVED SHOULDER, P.C. CONCRETE, 7 IN.	SY	<input type="checkbox"/>
2122-5190009	PAVED SHOULDER, P.C. CONCRETE, 9 IN.	SY	<input type="checkbox"/>
2214-5145150	PAV'T, SCARIFICATION	SY	<input type="checkbox"/>

Displaying all 4 items

Click "Ok" in the pop-up window.

demo2.appia.net says

Are you sure you want to remove the selected items from the worksheet?

**OK** Cancel

# 19 - Reference Data: Contractors

(System Administrator access level required.)

A list of approved contractors is given to each local agency when they set up their Appia account. To view the list of contractors present in the reference data, click on the “Reference Data” button in the left menu and then on the “Contractors” button in the expanded menu.

**My Projects**

Find Project

**Under Construction**

**Pro tip:** Projects statuses are located here. Click or tap to select a different status than the one showing. [Dismiss](#)

**Pro tip:** Click or tap the star to add a project to your favorite projects. My Projects will default to Favorites at next login if a favorite is selected. [Dismiss](#)

	Description	
★	03-C003-062	+
★	STP-S-C011(71)--5E-11 - 29427	+
★	36-C035-074 JSON TEST/FINANCE <span>Imported</span>	+
★	BHM-SWAP-1827(684)--SA-82-1 12345	+
★	BROS-C004(103)--8J-04 - 35155	+
★	BROS-C078(111)--FF-78_Payment for Multiple Sections	+
★	BROS-C086(60)--8J-86 - 31961	+
★	BRS-C036(74)--60-36 - AcctID	+
★	BRS-C036(74)--60-36 - AcctID_02_Central01	+
★	BRS-C036(74)--60-36 - AcctID_03_West01	+
★	BRS-C036(74)--60-36 - AcctID_05_West02	+
★	BRS-C036(74)--60-36 - AcctID_06_West02	+

**REFERENCE DATA**

**CONTRACTORS**

**SYSTEM MGT**

This screen will appear showing the list of contractors. If the contractor you are looking for is not on the list, it may be because the list is out of date. If the project was let through the DOT, the Contracts Bureau has already verified that the prime contractor and any subcontractors listed in the ORIGINAL .con file are qualified contractors, so you should be safe to add the contractor in question. If the contractor in question is a subcontractor who has been added after the project has commenced, you will need to verify that they are qualified and are on the approved EEO/AA list. A .xlsx list of pre-qualified bidders may be found on the [Contracts Bureau website](#) by clicking on “Prequalified Bidders List” under “General Letting Information” in the left menu. There is also a link on the same web page to the list on the ICEA Service Bureau website.

If Appia is being used for locally-let projects, it is the local agency’s responsibility to verify the qualifications of the contractor before adding them, but adding locally qualified contractors to the reference data IS permissible since the reference data in Appia is the local agency’s.

To add a contractor to the reference data set, click on the “Add” button in the upper, right corner.

The screenshot shows the 'Reference Data / Contractors' page in the Appia system. The left sidebar contains navigation options: MY PROJECTS, ITEMS, MATERIALS, ITEM MATERIALS, WORKSHEETS, and CONTRACTORS (which is highlighted in red). The main content area is titled 'Contractors' and features a search bar with the placeholder text 'Search for Organization or Contractor ID'. In the top right corner of the main area, there are three buttons: 'Add' (circled in green), 'Import', and 'Export'. Below the search bar is a table with two columns: 'Organization' and 'Contractor ID'. The table lists various contractors, including '1ST AEROW VALUATION GROUP, LLC', '1ST CALL LAWN CARE', '1 STOP SIGN & SAFETY INC.', '1ST RESOURCE SOLUTIONS, LLC', '2 UNIQUE, INC.', '300 INDUSTRIAL, LLC', '360 CONCRETE SERVICES, LLC', '360 DOT CONSTRUCTION COMPANY, INC.', '3D EROSION CONTROL', '3 G CONSTRUCTION, INC.', '3M COMPANY', '4C'S CONSULTING, LLC', and '4J FENCE COMPANY'. Each row has a red 'X' icon in the rightmost column, indicating that these contractors are not yet added to the system.

Organization	Contractor ID
1ST AEROW VALUATION GROUP, LLC	1.003
1ST CALL LAWN CARE	1.005
1 STOP SIGN & SAFETY INC.	1.01
1ST RESOURCE SOLUTIONS, LLC	1.008
2 UNIQUE, INC.	2.02
300 INDUSTRIAL, LLC	3.005
360 CONCRETE SERVICES, LLC	3.006
360 DOT CONSTRUCTION COMPANY, INC.	3.007
3D EROSION CONTROL	3.01
3 G CONSTRUCTION, INC.	3.03
3M COMPANY	3.02
4C'S CONSULTING, LLC	4.003
4J FENCE COMPANY	4.01



Enter the appropriate information on this screen.

The “Contractor ID” for DOT-qualified contractors can be found in Column A of the pre-qualified contractor list on the [Contracts Bureau website](#) as mentioned on the previous page. The “Organization” is the business name of the contractor.

Click “Save” in the upper, right corner when finished entering the necessary information.

Reference Data / Contractors / New

New

**\* Contractor ID**

**\* Organization**

Contact Person

Phone

Fax

Email

Address

City

State

Postal Code

DBE/MBE/WBE?

support@appia.net  
(888) 352-2439

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Alternately, you can update the entire contractor list by importing the entire pre-qualified bidders list. To do this, first download and save the pre-qualified contractor list from the [Contracts Bureau website](#) and then click “Import”.

The screenshot shows the 'Contractors' page in the software. The left sidebar contains navigation options: MY PROJECTS, ITEMS, MATERIALS, ITEM MATERIALS, WORKSHEETS, CONTRACTORS (highlighted in red), and LISTS. The main content area is titled 'Contractors' and includes a search bar with the placeholder text 'Search for Organization or Contractor ID'. Below the search bar is a table with two columns: 'Organization' and 'Contractor ID'. The table lists several contractors, each with a red 'X' icon in the right margin. The 'Import' button in the top right corner is circled in green.

Organization	Contractor ID
1ST AEROW VALUATION GROUP, LLC	1.003
1ST CALL LAWN CARE	1.005
1 STOP SIGN & SAFETY INC.	1.01
1ST RESOURCE SOLUTIONS, LLC	1.008
2 UNIQUE, INC.	2.02
300 INDUSTRIAL, LLC	3.005
360 CONCRETE SERVICES, LLC	3.006
360 DOT CONSTRUCTION COMPANY, INC.	3.007
3D EROSION CONTROL	3.01
3 G CONSTRUCTION, INC.	3.03
3M COMPANY	3.02

Browse for the .xlsx contractor list file you saved to your computer. Once selected, click on the “Upload” button.

The screenshot shows the 'Import Contractors' dialog box. The left sidebar is the same as the previous screenshot. The main content area is titled 'Import Contractors' and includes a 'Cancel' button in the top right corner. Below the title is a text prompt: 'Choose a CSV or Excel file to import.' Below this is a file selection area with a 'Choose File' button and a text field containing the file name 'QualContr 05.27.20\_From Contracts Website.xlsx'. At the bottom of the dialog is an 'Upload File' button.

Use the drop-down boxes along the top to assign the column names.

Columns that must have names assigned:

- "Contractor ID"
- "Organization"
- "Address"
- "City"
- "State"

Reference Data / Contractors / Import

### Import Contractors

Import Cancel

Select number of rows to skip  
\*\* None Selected \*\*

Options  
☐ Allow existing data to be overwritten?

Preview (first 10 out of 2883 rows)

Contractor ID	Organization	Unassigned Column	Unassigned Column	Unassigned Column	Address	Unassigned Column	City
3.005	300 INDUSTRIAL, LLC		2021-06-30	BRIDGE PAINTING	5959 W. LIBERTY ST. 2ND FLOOR		HUBBARD
3.005	300 INDUSTRIAL, LLC		2021-06-30	BRIDGE WASHING	5959 W. LIBERTY ST. 2ND FLOOR		HUBBARD
3.005	300 INDUSTRIAL, LLC		2021-06-30	MISCELLANEOUS	5959 W. LIBERTY ST. 2ND FLOOR		HUBBARD
A.011	AAD CONTRACTING, INC.		2020-06-30	BRIDGE WASHING	677 VILLA MARIE ROAD		LOWELLVILLE
A.011	AAD CONTRACTING, INC.		2020-06-30	MISCELLANEOUS	677 VILLA MARIE ROAD		LOWELLVILLE
A.013	A & A PAINTING, LLC.		2020-06-30	BRIDGE PAINTING	74 CREED CIRCLE		CAMPBELL
A.013	A & A PAINTING, LLC.		2020-06-30	BRIDGE WASHING	74 CREED CIRCLE		CAMPBELL

Reference Data / Contractors / Import

MY PROJECTS

ITEMS

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HELP

Import Contractors

Select number of rows to skip  
\*\* None Selected \*\*

Options  
☐ Allow existing data to be overwritten?

Preview (first 10 out of 2883 rows)

Address	Unassigned Column	City	State	Postal Code	Phone	Fax	Email
W. LIBERTY ST. FLOOR		HUBBARD	OH	44425	(330)568-4380	(330)568-4381	INDUSTRIAL300@YAHOO.COM
W. LIBERTY ST. FLOOR		HUBBARD	OH	44425	(330)568-4380	(330)568-4381	INDUSTRIAL300@YAHOO.COM
W. LIBERTY ST. FLOOR		HUBBARD	OH	44425	(330)568-4380	(330)568-4381	INDUSTRIAL300@YAHOO.COM
ILLA MARIE ROAD		LOWELLVILLE	OH	44436	(330)507-6171		ajd@aadcontracting.com
ILLA MARIE ROAD		LOWELLVILLE	OH	44436	(330)507-6171		ajd@aadcontracting.com
EED CIRCLE		CAMPBELL	OH	44405	(330)750-0637	(330)750-0637	AAPAINTINGPLUS@AOL.COM
EED CIRCLE		CAMPBELL	OH	44405	(330)750-0637	(330)750-0637	AAPAINTINGPLUS@AOL.COM
EED CIRCLE		CAMPBELL	OH	44405	(330)750-0637	(330)750-0637	AAPAINTINGPLUS@AOL.COM
BALDUR PARK		WAYZATA	MN	55391	(952)210-2655		selliott9369@gmail.com
BALDUR PARK		WAYZATA	MN	55391	(952)210-2655		selliott9369@gmail.com

### Import Contractors

Select number of rows to skip

\*\* None Selected \*\*

### Options

☐ Allow existing data to be overwritten?

Preview (first 10 out of 2883 rows)

Address	Unassigned Column	City	State	Postal Code	Phone	Fax	Email
W. LIBERTY ST. FLOOR		HUBBARD	OH	44425	(330)568-4380	(330)568-4381	INDUSTRIAL300@YAHOO.COM
W. LIBERTY ST. FLOOR		HUBBARD	OH	44425	(330)568-4380	(330)568-4381	INDUSTRIAL300@YAHOO.COM
W. LIBERTY ST. FLOOR		HUBBARD	OH	44425	(330)568-4380	(330)568-4381	INDUSTRIAL300@YAHOO.COM
ELLA MARIE ROAD		LOWELLVILLE	OH	44436	(330)507-6171		ajd@aadcontracting.com
ELLA MARIE ROAD		LOWELLVILLE	OH	44436	(330)507-6171		ajd@aadcontracting.com
EED CIRCLE		CAMPBELL	OH	44405	(330)750-0637	(330)750-0637	AAPAININGPLUS@AOL.COM
EED CIRCLE		CAMPBELL	OH	44405	(330)750-0637	(330)750-0637	AAPAININGPLUS@AOL.COM
EED CIRCLE		CAMPBELL	OH	44405	(330)750-0637	(330)750-0637	AAPAININGPLUS@AOL.COM
WALDUR PARK		WAYZATA	MN	55391	(952)210-2655		selliott9369@gmail.com
WALDUR PARK		WAYZATA	MN	55391	(952)210-2655		selliott9369@gmail.com

[support@annia.net](mailto:support@annia.net)

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If you do NOT want your current list to be overwritten, do NOT check the “Allow existing data to be overwritten” box in gray. If you are ok with existing data being updated, check the box.

Click “Import”.

If successful, the screen with the list of contractors will come up with a green ribbon across the top showing the import was successful.

Reference Data / Contractors

### Contractors

Add Import Export

2883 rows successfully imported.

Search for Organization or Contractor ID Search

Organization	Contractor ID	
1ST AEROW VALUATION GROUP, LLC	1.003	
1ST CALL LAWN CARE	1.005	
1 STOP SIGN & SAFETY INC.	1.01	x
1ST RESOURCE SOLUTIONS, LLC	1.008	x
2 UNIQUE, INC.	2.02	x
300 INDUSTRIAL, LLC	3.005	x
360 CONCRETE SERVICES, LLC	3.006	x
360 DOT CONSTRUCTION COMPANY, INC.	3.007	x
3D EROSION CONTROL	3.01	x
3 G CONSTRUCTION, INC.	3.03	x
3M COMPANY	3.02	x
4C'S CONSULTING, LLC	4.003	
4 I FENCE COMPANY	4.01	x

To delete a contractor from the list, click on the red circle with the “x” on the right side of the line.

# 20 - Reference Data: Lists

(System Administrator access level required.)

## A. Overview of Lists

There are a variety of lists in the Reference Data. Lists contain information that populate choices in pull-down menus or create custom fields for data entry. To view the lists present in the reference data, click on the “Reference Data” button in the left menu and then on the “Lists” button in the expanded menu.

The screenshot shows the 'My Projects' interface. In the left sidebar, the 'REFERENCE DATA' button is highlighted with a green circle. Below it, the 'LISTS' button is also highlighted with a green circle. The main content area displays a table of 'Favorites' projects.

Project ID	Description	Project Status
01-C001-116 <small>Imported</small>	WORKDAY TEST_FM-C001(116)--55-01, AcctID- 37895, FM-C001(117)--55-01, AcctID- 37896, Letting date- 17 Aug 2021	Construction
04-C004-116 <small>Imported</small>	FM-C004(116)--55-04, Acct ID- 38373, Letting Date- February 15, 2022	Construction
09-C009-088 <small>Imported</small>	TEST FOR WORKDAY_Correct NTP date_BROS-SWAP-C009(88)--FE-09, AcctID- 37865, Letting Date- 20 July 2021	Construction
15-C015-072 <small>Imported</small>	BROS-SWAP-C015(72)--FE-15, AcctID- 37709, Letting Date- 20 April 2021	Construction
21-C021-153 <small>Imported</small>	STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022	Construction
23-C023-124 <small>Imported</small>	WORKDAY TEST_HDP-C023(124)--6B-23, AcctID- 37929, Letting Date- 17 Aug 2021	Construction
33-C033-144 <small>Imported</small>	FM-C033(144)--55-33, Acct ID- 38385, HSIP-SWAP-C033(143)--FJ-33, Acct ID- 38384, STBG-SWAP-C033(126)--FG-33, Acct ID- 38383, Letting Date- February 15, 2022	Construction
42-0077-601 <small>Imported</small>	BRS-SWAP-0077(601)--FF-42, Acct ID- 38339, Letting Date- February 15, 2022	Construction
52-C052-120 <small>Imported</small>	STBG-SWAP-C052(120)--FG-52, AcctID- 37915, Letting Date- 17 Aug 2021	Construction
64-C064-134 <small>Imported</small>	TEST FOR WEI _ BROSCHBP-C064(134)--NC-64, AcctID- 37333, BRS-CHBP-C038(114)--GB-38, AcctID- 37332, Letting Date- 20 Jan 2021	Construction

The following screen will appear showing all of the available list types in Appia. If the list name is in blue text, there is data currently associated with the list. If the list name is in black text, that list is blank.

The following lists should be populated (blue text) in your account.

- Change Order Custom Fields – Refer to [Section B. Editing Lists](#) for guidance on creating this list. The following items need to be included in this list. (Hint: Copy/paste them directly from these instructions, without the bullet, when creating your list.)
  - B - Reason for change:
  - C - Settlement for cost(s) of change as follows with items addressed in Sections F and/or G:
  - D - Justification for cost(s) (See I.M. 6.000 Attachment D, Chapter 2.36, for acceptable justification):
  - E - Contract time adjustment:
- Change Order Type – This contains the types of change orders (Significant, Non-Participating, etc.).
- Daily Report Custom Fields (optional) – This is where you can add any desired custom fields to daily reports.
- Material Forms – This is a listing of forms associated with materials. This list is not currently used.
- Work Type – This lists all of the contract work types.



ITEMS

MATERIALS

ITEM MATERIALS

WORKSHEETS

CONTRACTORS

LISTS

## Lists

Attachment Groups	Import	Edit
Change Order Custom Fields	Import	Edit
Change Order Type	Import	Edit
Corridors	Import	Edit
Counties	Import	Edit
Daily Report Custom Fields	Import	Edit
Diary Custom Fields	Import	Edit
Districts	Import	Edit
Divisions	Import	Edit
Equipment	Import	Edit
Fund Types	Import	Edit
Material Forms	Import	Edit
Material Manufacturer	Import	Edit
Material Suppliers	Import	Edit
Municipalities	Import	Edit
Personnel	Import	Edit
Regions	Import	Edit
States	Import	Edit
Work Type		

Help

To view any list, click on the blue “v” arrow to the left of the list name. The list will expand, and its contents will be visible. Click the “^” to the left of the list name to collapse the list and hide the contents.

Lists		
▼ Attachment Groups	Import	Edit
▼ Change Order Custom Fields	Import	Edit
▼ Change Order Type	Import	Edit
▼ Corridors	Import	Edit
▼ Counties	Import	Edit



Lists		
▼ Attachment Groups	Import	Edit
▲ Change Order Custom Fields	Import	Edit
B - Reason for change:		
C - Settlement for cost(s) of change as follows with items addressed in Sections F and/or G:		
D - Justification for cost(s) (See I.M. 6.000 Attachment D, Chapter 2.36, for acceptable justification):		
E - Contract time adjustment:		
▼ Change Order Type	Import	Edit
▼ Corridors	Import	Edit
▼ Counties	Import	Edit
▼ Daily Report Custom Fields	Import	Edit
▼ Diary Custom Fields	Import	Edit

## B. Editing Lists

*Note: This section should be referenced when creating Change Order Custom Fields or when a “Work type does not exist” error has been encountered during a project setup import.*

To edit the contents of a list, click the blue “Edit” text on the right end of the line containing the list’s name. You may edit entries already existing in a list, or you may create new entries.

Lists		
▼ Attachment Groups	Import	Edit
▼ Change Order Custom Fields	Import	Edit
▼ Change Order Type	Import	Edit
▼ Corridors	Import	Edit
▼ Counties	Import	Edit

If the list is currently un-populated/not in use, you will arrive at the screen shown below (with the list tile being whichever list you selected to edit).

Daily Report Custom Fields

SaveCancel

Add Value

If the chosen list is currently populated/in use, you will arrive at a screen displaying fields for all of the existing items in the list, as shown below.

Change Order Custom Fields

Save

Cancel

\* Value

B - Reason for change:

\* Value

C - Settlement for cost(s) of change as follows with items addressed in Sections F and/or G:

\* Value

D - Justification for cost(s) (See I.M. 6.000 Attachment D, Chapter 2.36, for acceptable justification):

\* Value

E - Contract time adjustment:

Add Value

To edit an existing list item, simply click into the box containing the item's information and edit it as desired.

To add a new item to the list, click on the gray "Add Value" button at the very bottom, center of the screen. (You might have to scroll down a ways if the list is long.)

Change Order Custom Fields Save Cancel

\* Value ✕  
B - Reason for change:

\* Value ✕  
C - Settlement for cost(s) of change as follows with items addressed in Sections F and/or G:

\* Value ✕  
D - Justification for cost(s) (See I.M. 6.000 Attachment D, Chapter 2.36, for acceptable justification):

Add Value

If “Add Value” is chosen, a blank field will be created at the bottom of the list. Enter the desired information to populate the field. Click on the “Add Value” button as many times as necessary to create the number of desired fields/items. When all new list items have been entered, click the blue “Save” button in the top, right corner.

Change Order Custom Fields

Save Cancel

\* Value ✕

B - Reason for change:

\* Value ✕

C - Settlement for cost(s) of change as follows with items addressed in Sections F and/or G:

\* Value ✕

D - Justification for cost(s) (See I.M. 6.000 Attachment D, Chapter 2.36, for acceptable justification):

\* Value ✕

Add Value

### C. Importing Lists

To import a file that creates a new list or overrides an existing list, click the blue “Import” text on the right end of the line containing the list’s name.

Lists	
▼ Attachment Groups	Import   Edit
▼ Change Order Custom Fields	Import   Edit
▼ Change Order Type	Import   Edit
▼ Corridors	Import   Edit
▼ Counties	Import   Edit

The following “Import values for” screen will appear. Click on the gray “Choose File” button near the left side of the screen.

### Import values for Change Order Type

Cancel

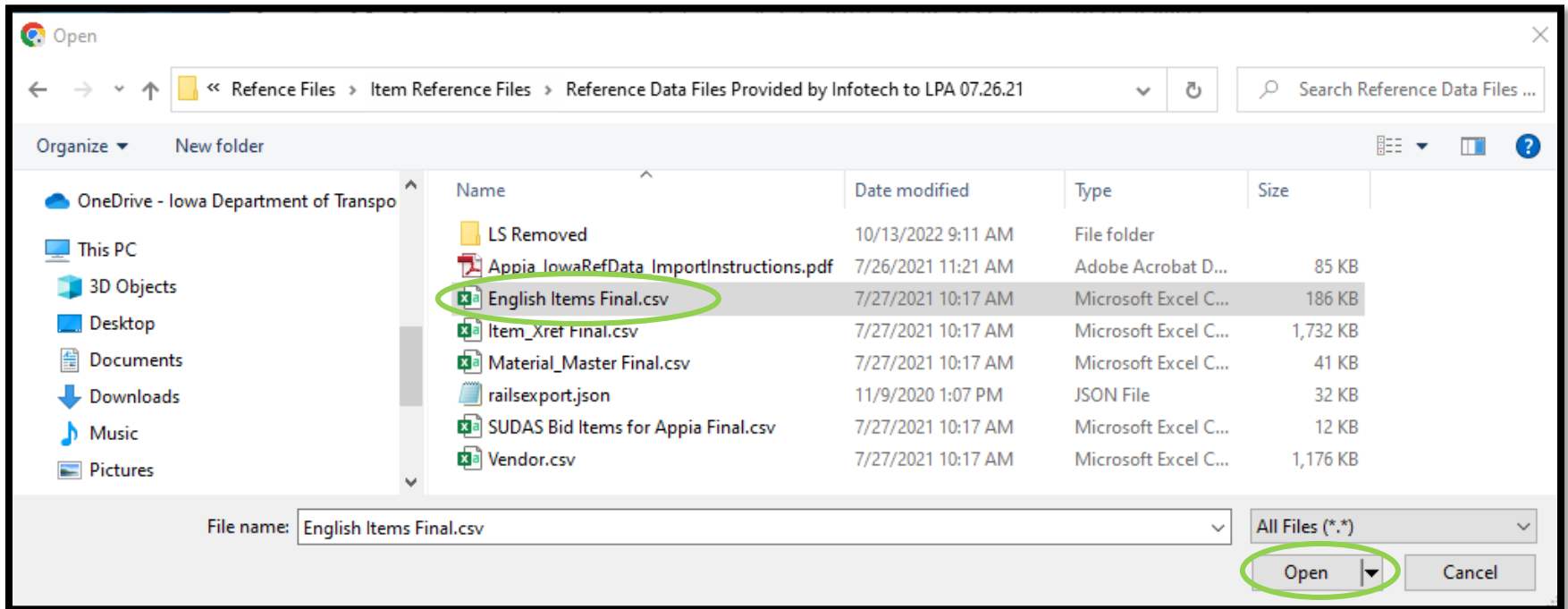
Choose a CSV or Excel file to import.

Choose File

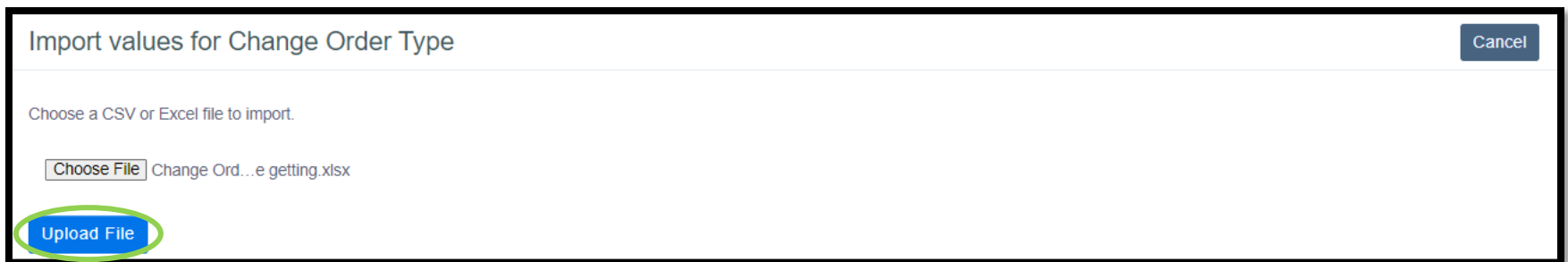
No file chosen

Upload File

Navigate to the desired file in the file explorer window that pops up and click the gray “Open” button in the lower, right corner of the file explorer window.



The “Import values for” screen will now show the name of the selected file to the right of the “Choose File” button. Click the blue “Upload File” near the bottom, left corner.





If there were multiple columns of information in the file you uploaded, multiple columns will show. Each will have a pull-down menu at the top showing “Unassigned Column”. Select a name in the pull-down menu for only the columns you want to import. Any unassigned columns will be left out of the import.

### Import values for Change Order Type

ImportCancel

Select number of rows to skip

\*\* None Selected \*\*

Preview (first 10 out of 6 rows)

Unassigned Column	Unassigned Column
Unassigned Column	1
Values	1
Non-significant – Non-Participating	1
Non-significant – Swap Participating	1
Significant – Federal-aid Participating	1
Significant – Non-Participating	1
Significant – Swap Participating	1

If there are headers in the imported file, select the number of rows that contain header information in the “Select number of rows to skip” pull-down menu near the top, left corner. This will cause the information in the header row to disappear from view and the import.

Import values for Change Order Type Import Cancel

Select number of rows to skip

**\*\* None Selected \*\*** ▼

Preview (first 10 out of 7 rows)

Values	Unassigned Column
Change Order Type	
Non-significant – Federal-Aid Participating	1
Non-significant – Non-Participating	1
Non-significant – Swap Participating	1
Significant – Federal-aid Participating	1
Significant – Non-Participating	1
Significant – Swap Participating	1

Import values for Change Order Type Import Cancel

Select number of rows to skip

**\*\* None Selected \*\*** ▼

**1**

2

3

4

5

6

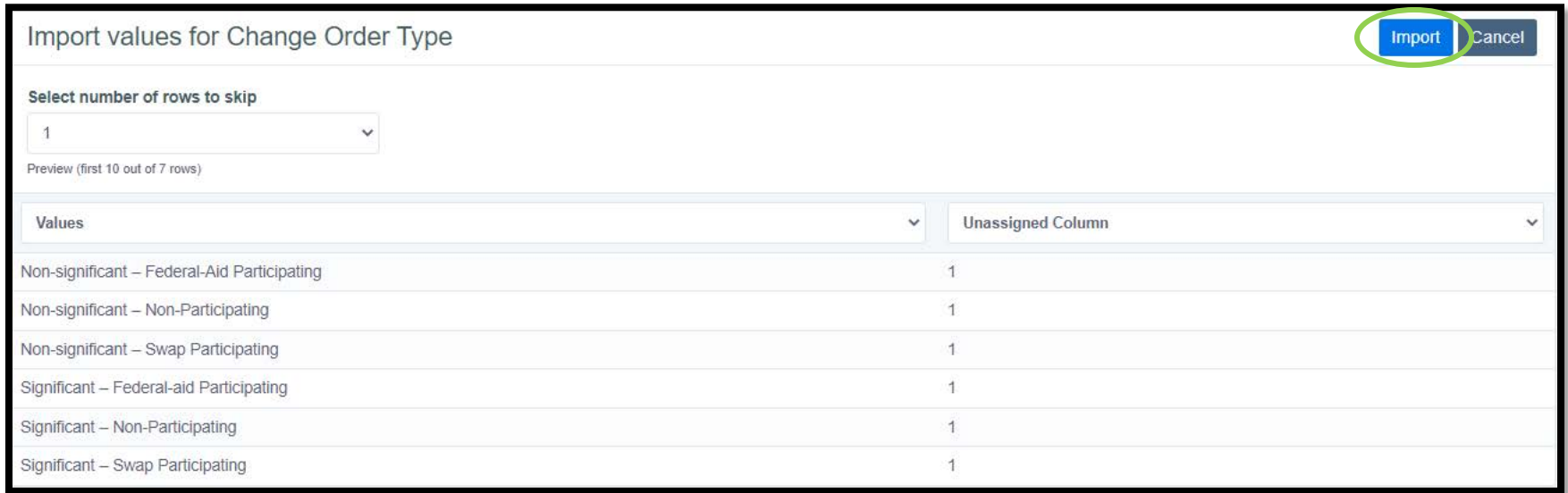
7

8

9

Values	Unassigned Column
Non-significant – Swap Participating	1
Significant – Federal-aid Participating	1

When the columns have been named and the number of header rows to skip has been specified, click on the blue “Import” button in the top, right corner.



Import values for Change Order Type

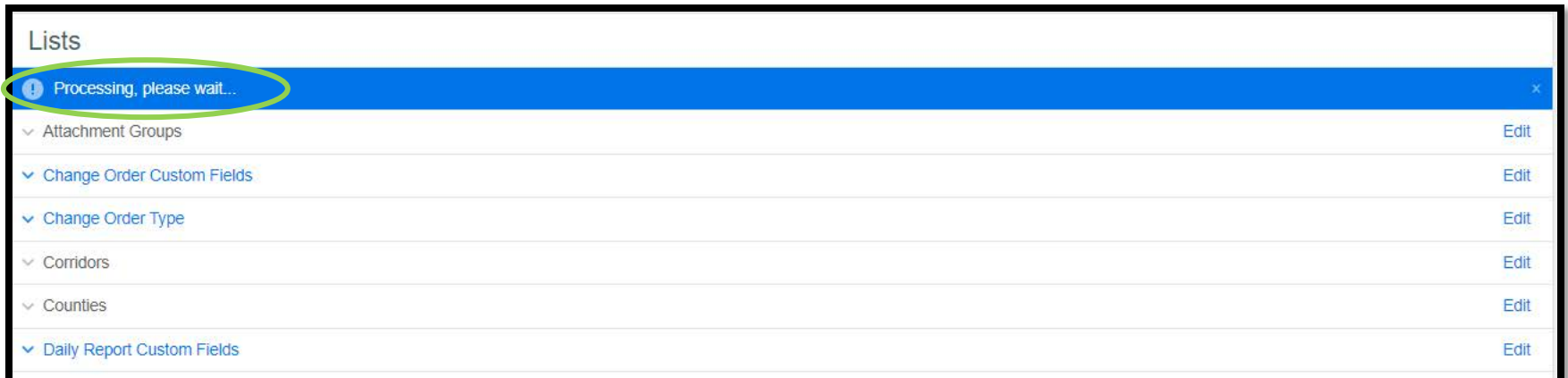
Select number of rows to skip

1

Preview (first 10 out of 7 rows)

Values	Unassigned Column
Non-significant – Federal-Aid Participating	1
Non-significant – Non-Participating	1
Non-significant – Swap Participating	1
Significant – Federal-aid Participating	1
Significant – Non-Participating	1
Significant – Swap Participating	1

A blue “Processing, please wait...” ribbon may appear at the top of the Lists screen while the list is being imported. Wait patiently while the program imports the information.



Lists

Processing, please wait...

- Attachment Groups Edit
- Change Order Custom Fields Edit
- Change Order Type Edit
- Corridors Edit
- Counties Edit
- Daily Report Custom Fields Edit

When the list has been imported successfully, a green “X” rows successfully imported” ribbon will appear. The import was successful, and the list has now been populated.

Lists		
6 rows successfully imported.		
Attachment Groups	Import	Edit
Change Order Custom Fields	Import	Edit
Change Order Type	Import	Edit
Corridors	Import	Edit
Counties	Import	Edit
Daily Report Custom Fields	Import	Edit

#### D. Resolving List Related Import Errors for Method 2 .json Imports (Including Work Type)

When importing a .json file, you may encounter an error message in a red ribbon that says, “The project couldn’t be imported because the JSON file contains errors. Please fix the errors and try the import again. [Show Errors](#)”. If you encounter this message, click on “[Show Errors](#)”.

The screenshot shows the 'My Projects' page in a software application. On the left is a dark sidebar with navigation icons for 'MY PROJECTS', 'REFERENCE DATA', 'SYSTEM MGT', and 'EXPORT DATA'. The main content area has a header with 'My Projects', a search bar labeled 'Find Project', and buttons for 'Create Project' and 'Import Project'. Below the header is a table with columns 'Project ID' and 'Description'. Above the table, a red error banner is displayed with the text: 'The project couldn't be imported because the JSON file contains errors. Please fix the errors and try the import again. [Show Errors](#)'. The 'Show Errors' link is circled in green. The table lists three projects, all marked as 'Imported'.

Project ID	Description
01-C001-118	BROS-SWAP-C001(118)–SE-01, Acct ID- 38903, Letting Date- November 15, 2022
02-C002-079	FM-C002(79)–55-02, Acct ID- 38469, Letting Date- March 15, 2022
04-C004-114	FM-C004(114)–55-04, AcctID- 37855, Letting Date- 20 July 2021

When you click on “[Show Errors](#)”, the red ribbon will expand downward, and the specific errors will be listed. If one of the errors says, “Work Type xxxxx does not exist in the reference data.”, then that item/work type is missing from your reference data set. You need to add it. Refer to Section [B. Editing Lists](#) for guidance on how to add the item/work type.

This screenshot shows the 'New' page where the error banner from the previous image has expanded. The red banner now contains the text: 'The project couldn't be imported because the JSON file contains errors. Please fix the errors and try the import again. [Hide Errors](#)'. Below the banner, a light pink box highlights the specific error: 'Work Type BRIDGE REPLACEMENT - CCS does not exist in the reference data.'. This error message is circled in green. Below the error box is the same table of projects as in the first screenshot.

Project ID	Description
01-C001-118	BROS-SWAP-C001(118)–SE-01, Acct ID- 38903, Letting Date- November 15, 2022
02-C002-079	FM-C002(79)–55-02, Acct ID- 38469, Letting Date- March 15, 2022
04-C004-114	FM-C004(114)–55-04, AcctID- 37855, Letting Date- 20 July 2021

# 21 - Help & Local Systems Contact Information for Questions and Assistance

## “Help” Site

There is a very useful “Help” site provided by Infotech that can assist you in answering any questions. It is searchable and is indexed by topic. To access the “Help” icon in the upper, right corner of the screen just to the left of your initials. (It is a circle with a question mark (?) inside.) Then, select “Knowledge center” from the drop-down menu.

The screenshot displays the Appia software interface. In the top right corner, there is a help icon (a circle with a question mark) next to the user initials 'NS'. A dropdown menu is open from this icon, showing three options: 'Support', 'Knowledge Builder', and 'Knowledge center'. The 'Knowledge center' option is highlighted with a green circle. The main interface shows a project overview for '21-C021-153' with a status of 'Under Construction'. The project details include 'STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022'. The 'Overview' section shows a table with 'General Information', 'Awarded Amount' (\$4,553,445.96), and 'Authorized Amount' (\$4,750,603.96).

General Information	Awarded Amount	Authorized Amount
	\$4,553,445.96	\$4,750,603.96

The “Help” site opens in a new browser tab and is shown here.

The screenshot shows the Infotech Knowledge Center website. The header includes the Infotech logo, 'Knowledge Center', a search bar, and a 'Contact Support' link. The main content area is titled 'Appia®' and features a descriptive paragraph about its use by municipalities and engineering firms. A left sidebar lists various topics under the 'APPIA®' heading. The main content area also includes sections for 'Appia® | Business Setup', 'Appia® | User roles and permissions', 'Appia® | Order licenses as a first-time user', and 'Appia® | Add, renew, and assign licenses', each with a brief description and a 'See also' link.

infotech | Knowledge Center

Search

Contact Support

Infotech > Appia®

APPIA®

- Appia® | Business Setup
- Appia® | Reference Data
- Appia® | Projects in New Phase
- Appia® | Projects Under Construction
- Appia® | Project Closeout
- Appia® | Generating Reports and Sharing Data
- Appia® | Integrations
- Training Materials

## Appia®

Municipalities and engineering firms nationwide use Appia to streamline construction administration and inspection on federal, state, and locally-funded infrastructure projects. Appia's mix of mobile tools, integrations, and free read-only accounts supports collaboration and compliance on every project.

### Appia® | Business Setup

[Appia® | User roles and permissions](#)  
See also: Appia® | Licenses | Add, renew, or assign licenses Intro to Appia® user roles What is a user role...

[Appia® | Order licenses as a first-time user](#)  
See also: Appia® | Licenses | Add, renew, and manage licenses Appia® | User roles and permissions Are you and yo...

[Appia® | Add, renew, and assign licenses](#)



## **Local Systems Contact Information**

Contact Niki Stinn and/or Derek Peck in the [Iowa DOT Local Systems Bureau](#) as shown below with any questions.

### **Program usage technical assistance**

#### **Niki Stinn**

Title: Secondary Roads Engineer

Email: [Niki.Stinn@iowadot.us](mailto:Niki.Stinn@iowadot.us)

Phone: 515-239-1064

(Messages forwarded. Leave message if unanswered.)

Days: Monday-Friday

Hours: 8:30am-4:30pm (Hours may vary)

### **Account set-up and management assistance, Project set-up**

#### **Derek Peck**

Title: e-Construction Administrator

Email: [Derek.Peck@iowadot.us](mailto:Derek.Peck@iowadot.us)

Phone: 515-239-1391

(Messages forwarded. Leave message if unanswered.)

Days: Monday-Friday

Hours: 7:30am-4:30pm (Hours may vary)