Appia

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

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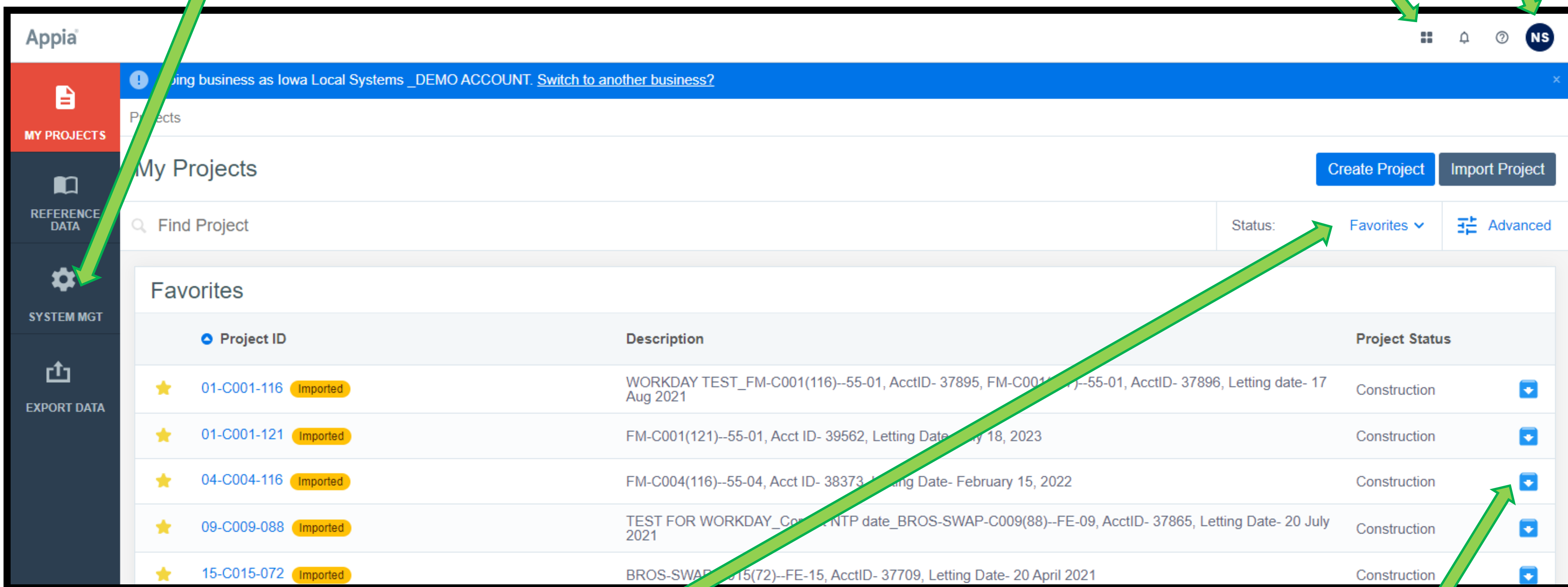
1 - Basic Navigation

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

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.



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

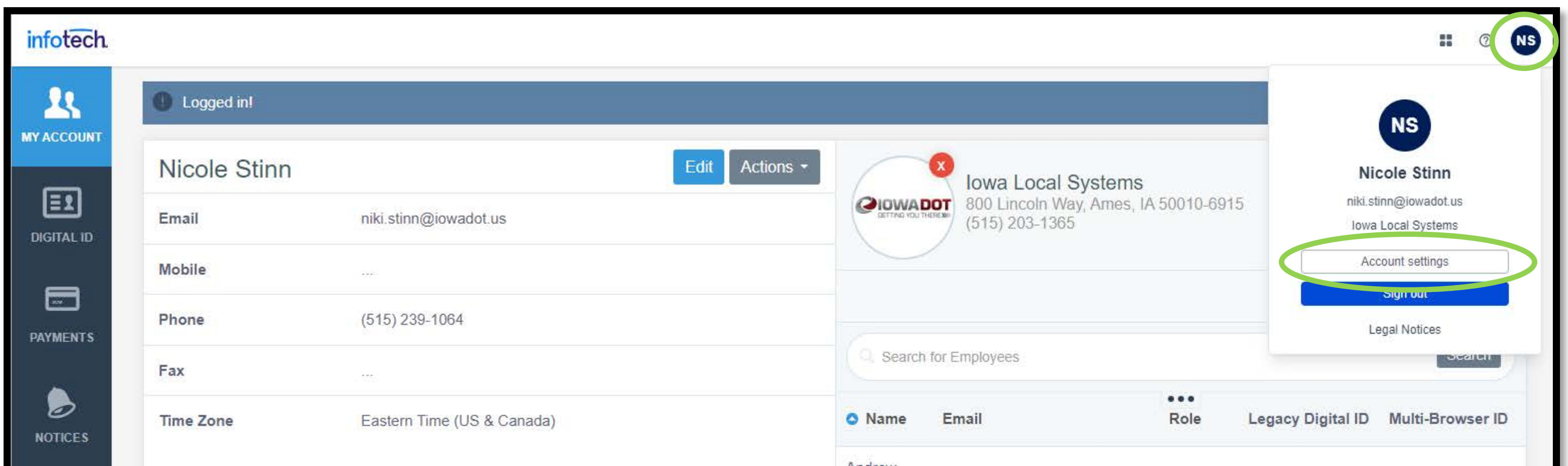
Appia and DocExpress are web-based products produced by Infotech. Appia and DocExpress are both provided to local agencies through the DOT's parent license at no direct cost to the local agencies. In order to establish the Appia account, the local agency needs to contact the E-Construction Administrator 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.

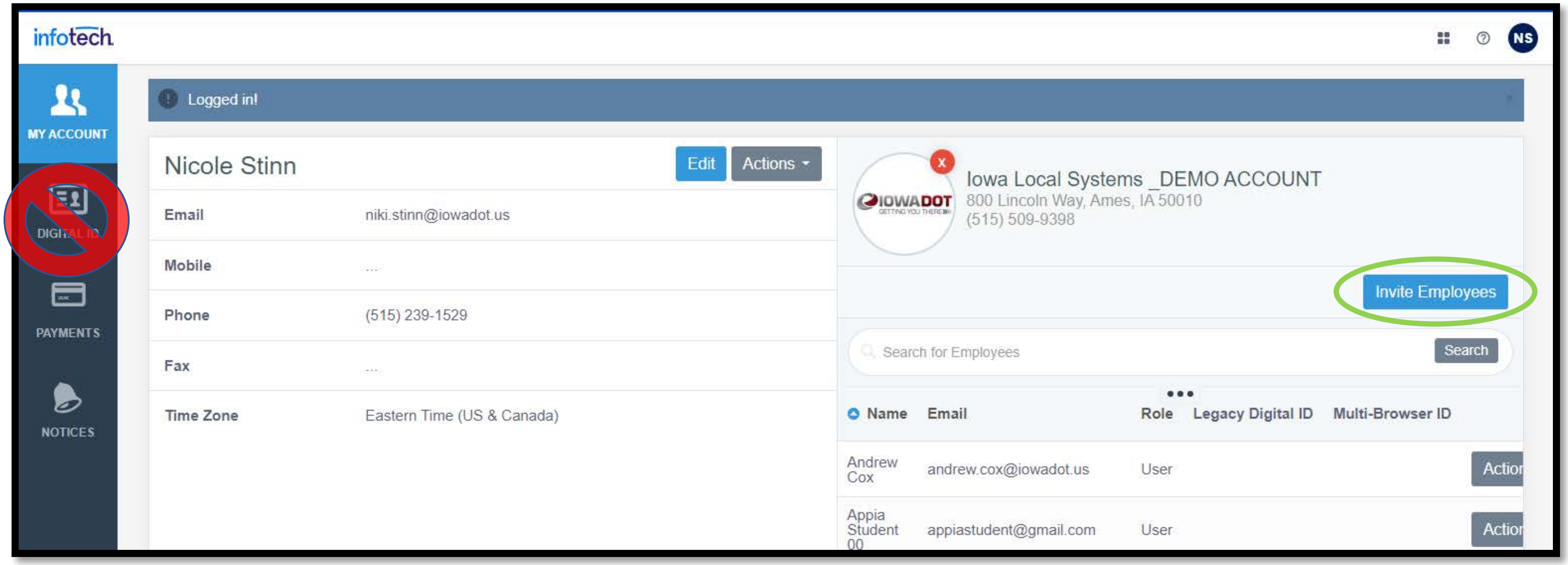
My Account

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.



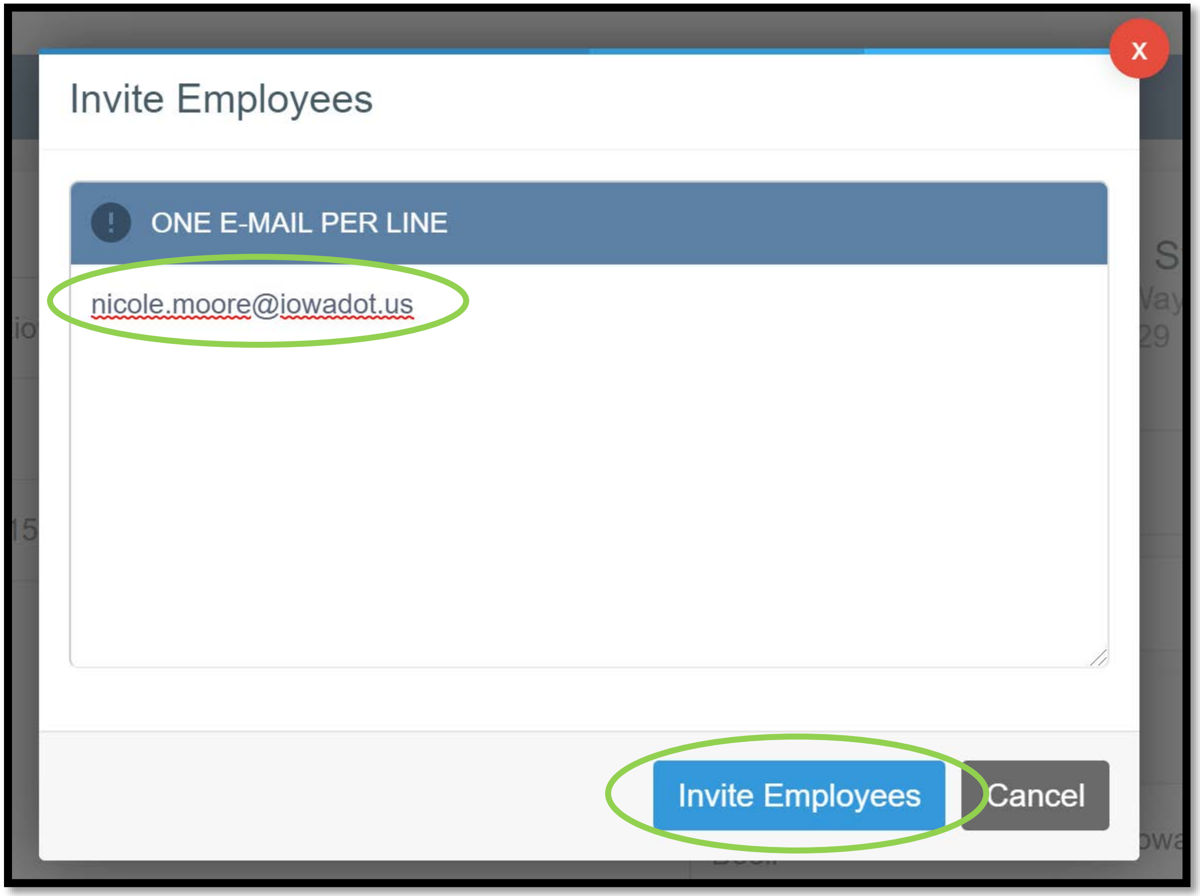
The "Account settings" screen is shown here. To add an employee to your agency's Infotech account, click on the "Invite Employees" button.



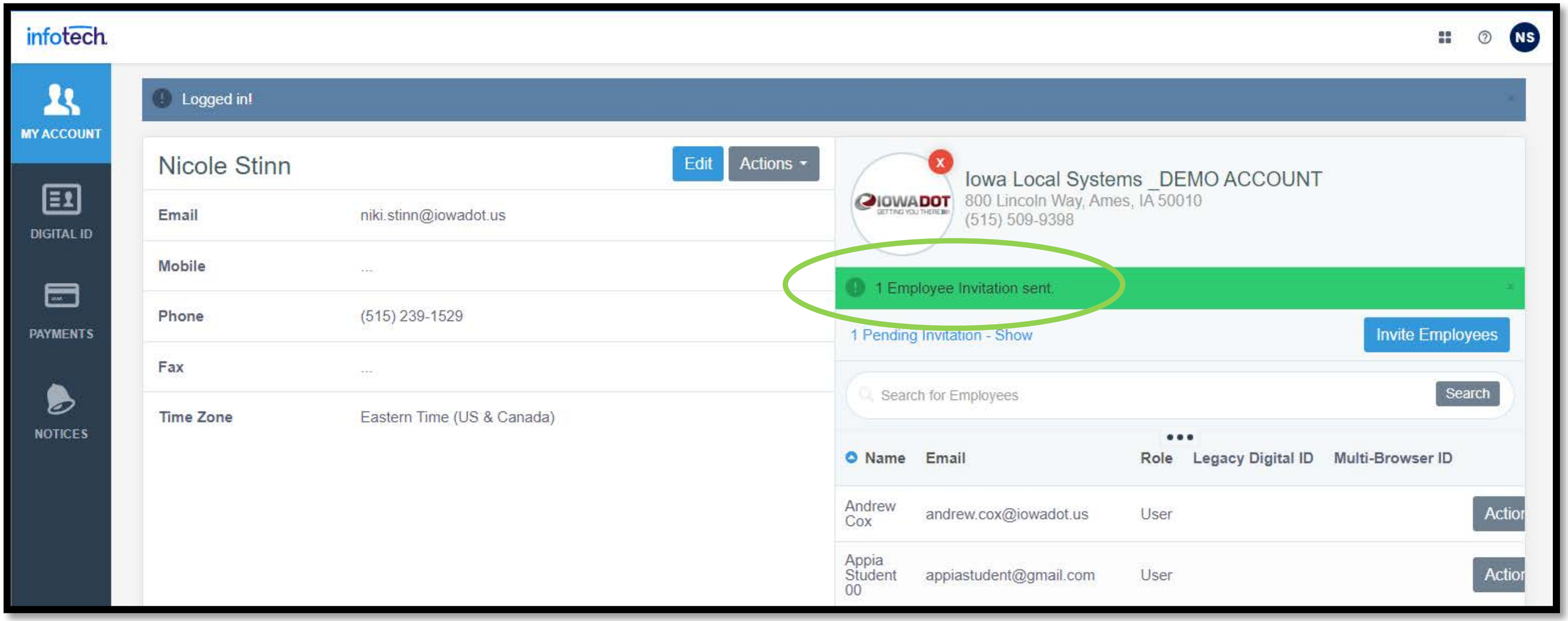
Note: Local agencies should NOT add any consultants to their account even if the consultant is working on a local agency's project. Consultants MUST purchase their own license.

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.)

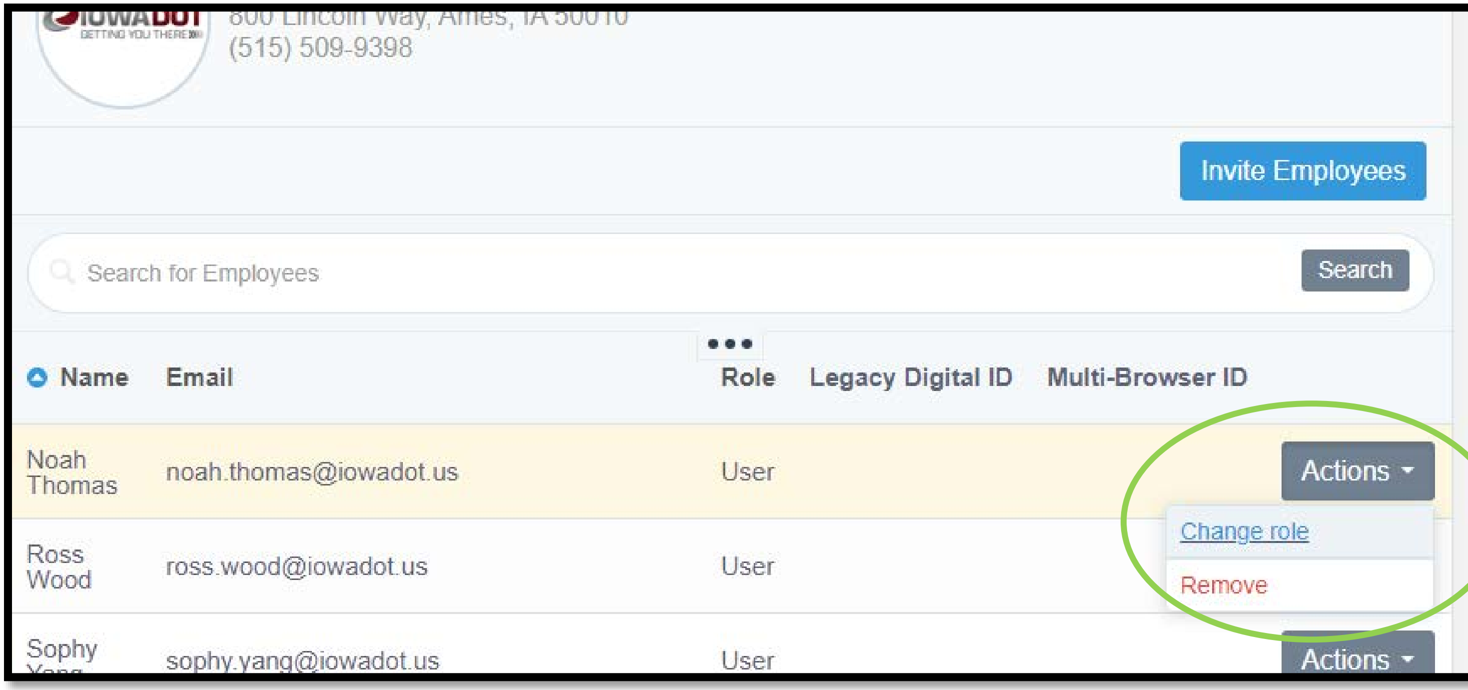
This pop-up window will appear. Type the email address for the employee into the box. When finished entering email addresses, click "Invite Employees".



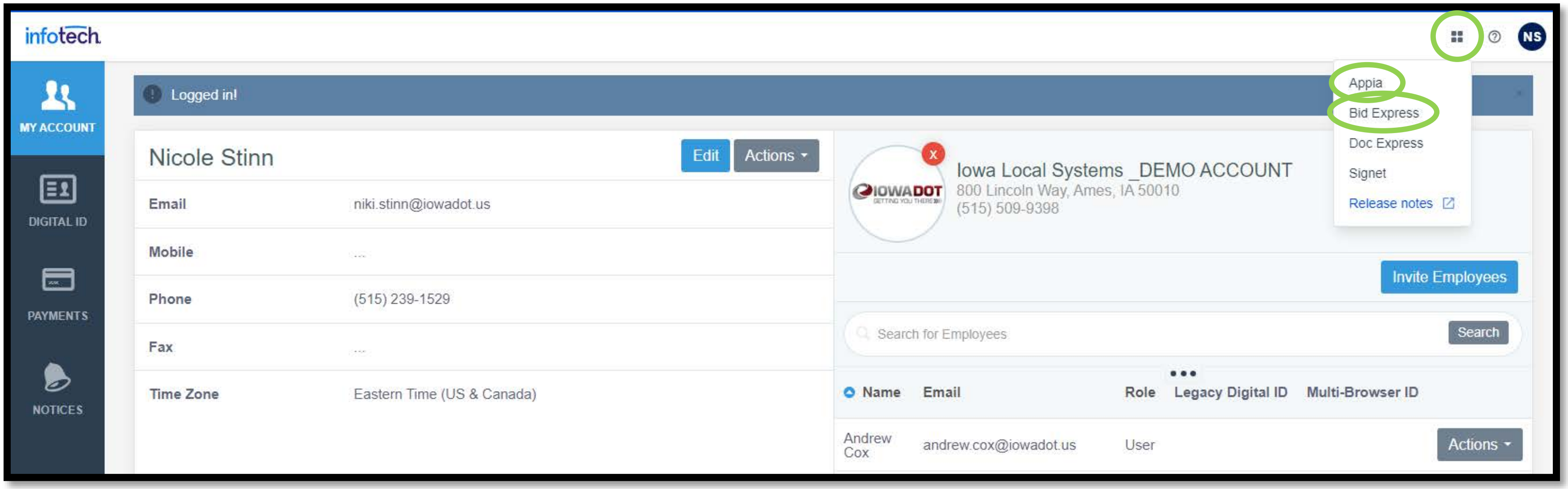
You will be brought back to the “My Account” screen where a green ribbon will show saying the invitation has been sent.



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".

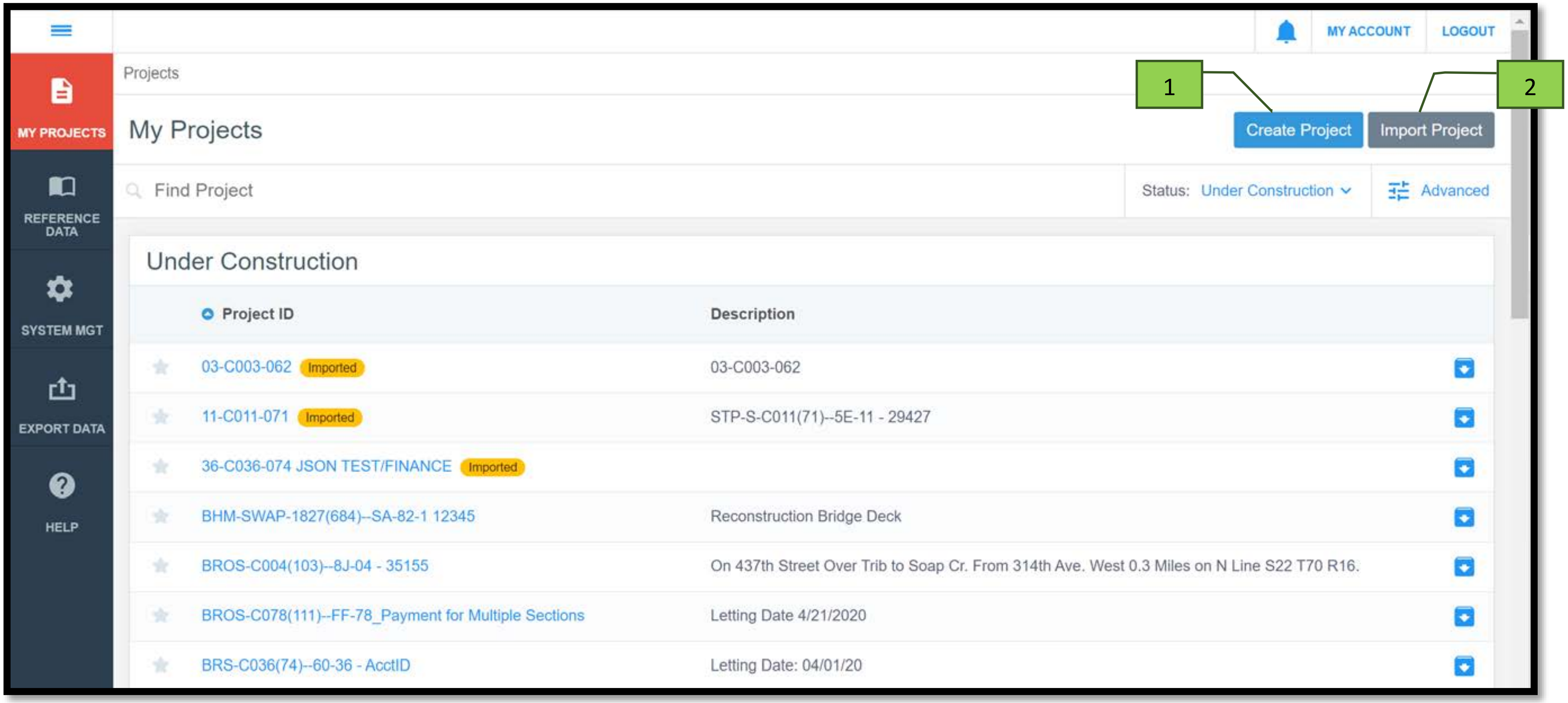


To return to Appia or Doc Express from the Account settings screen, click on the four-square box found near the upper right corner of the screen. Then, select either Appia or Doc Express form the pop-up box.



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

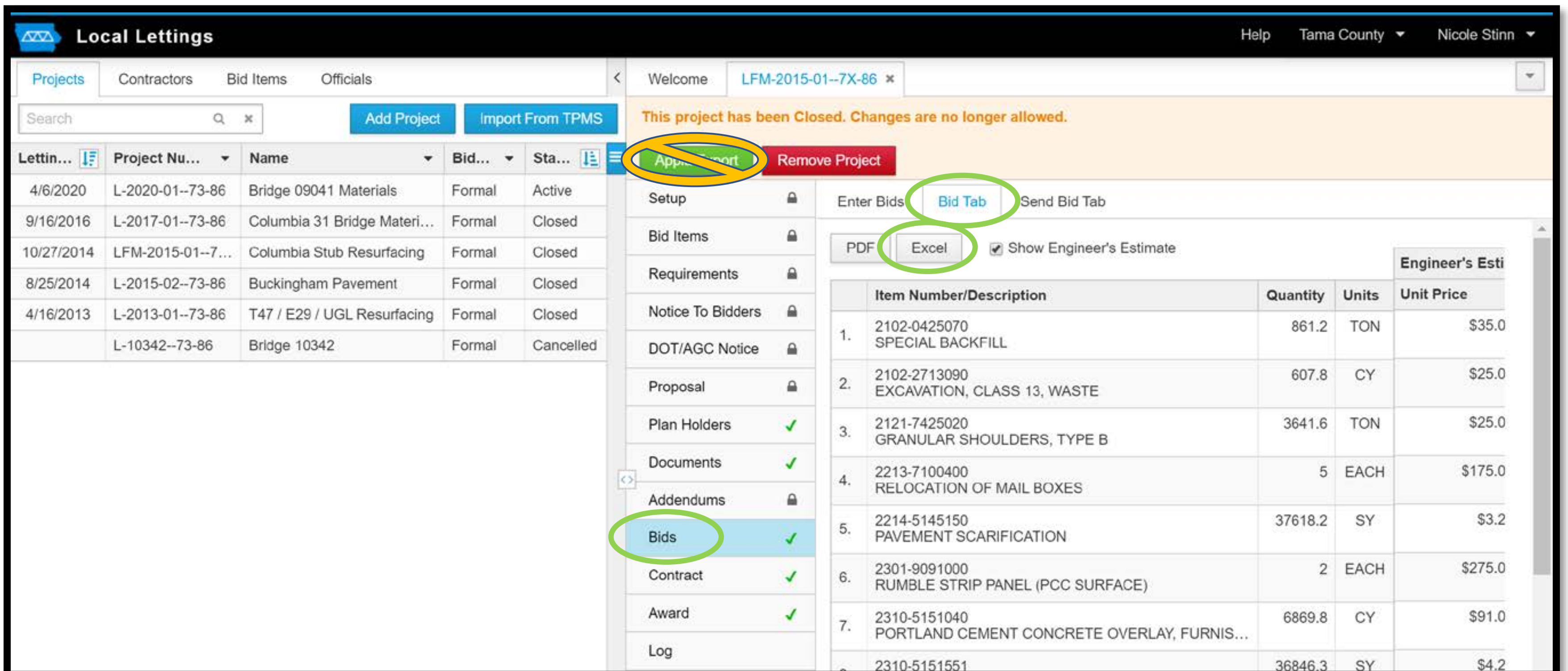


Method #1 – Creating a project

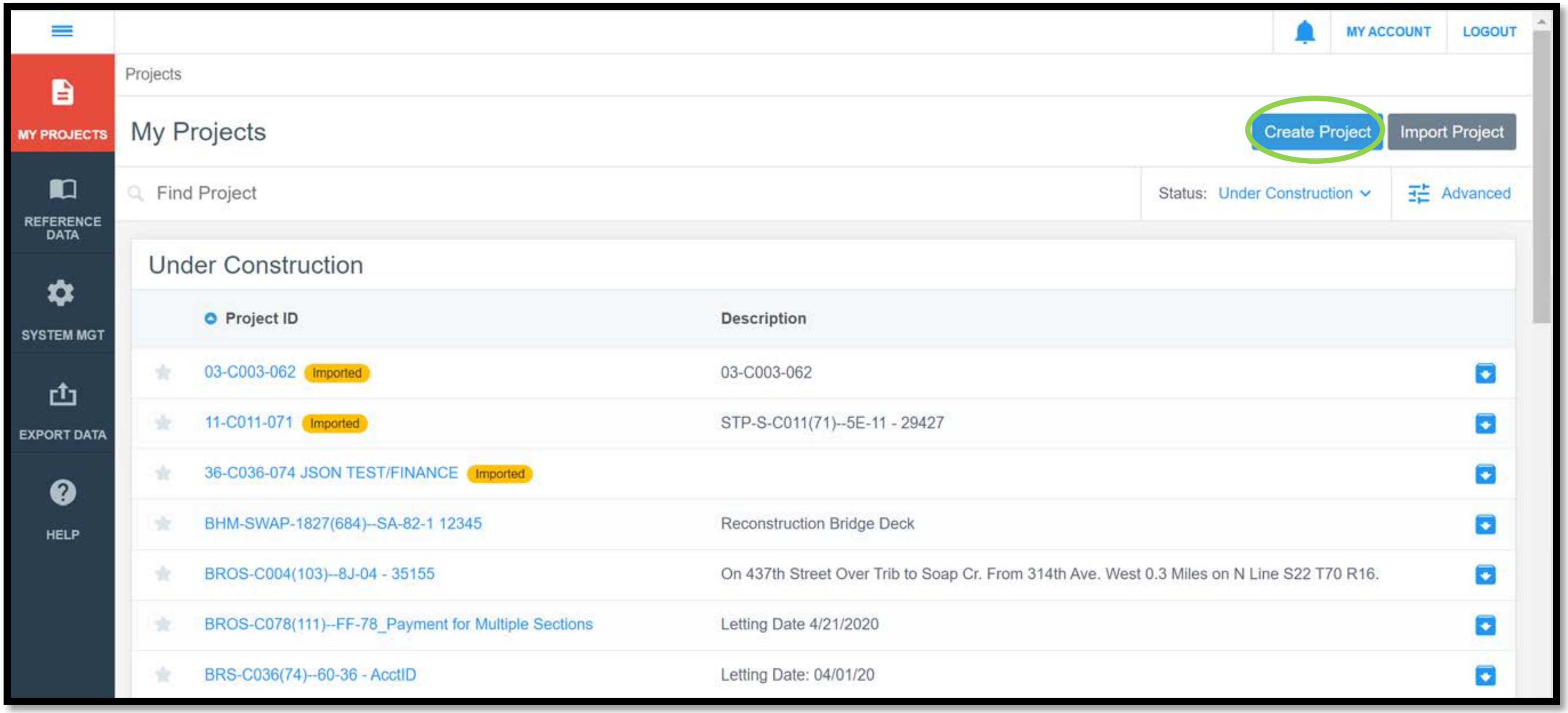
This method is used when importing a .csv file that contains the bid item information and unit prices. The remaining details of the project are entered manually.

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.



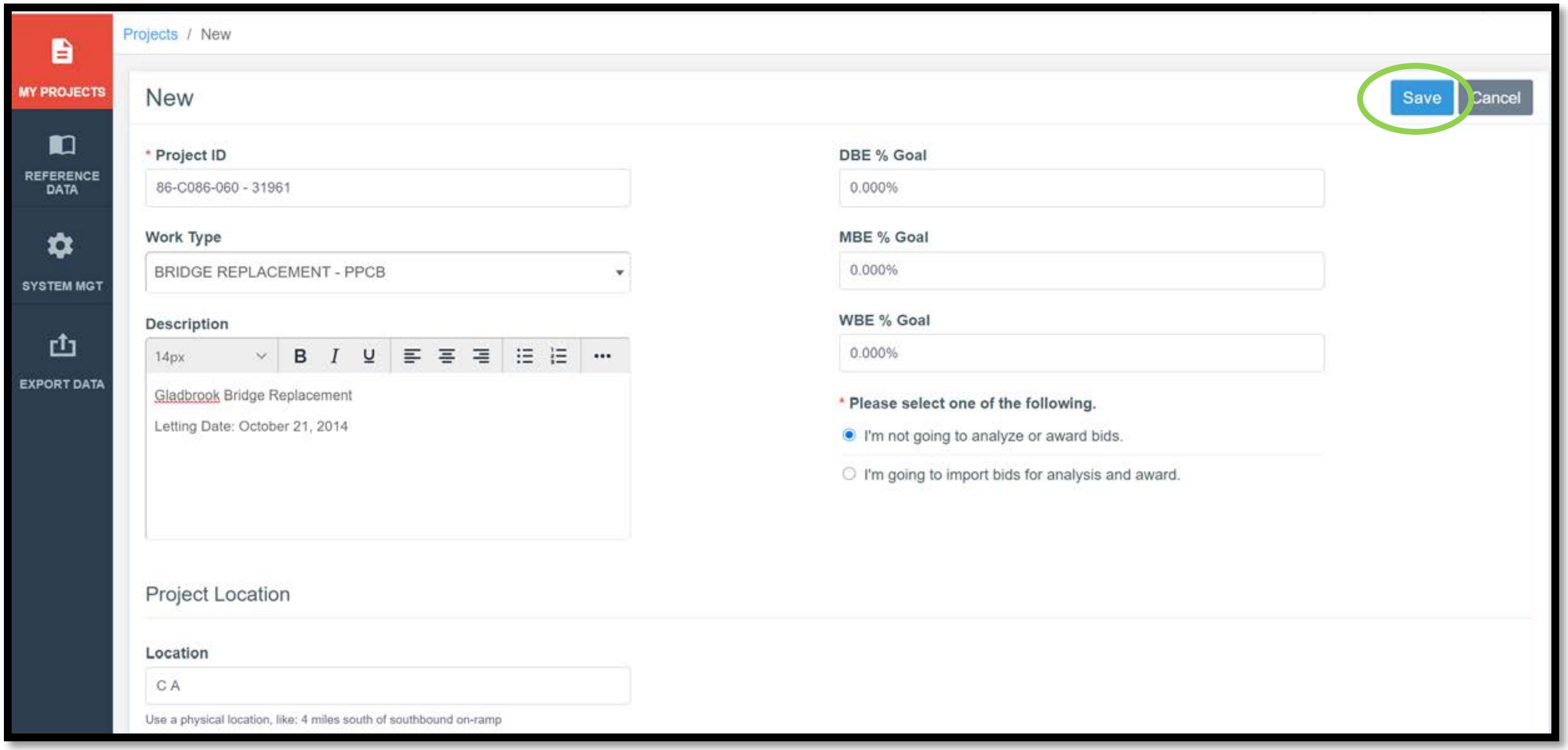
Once you have the .csv file (either from the Iowa DOT, the Service Bureau, or self-generated), click on the “Create Project” button.



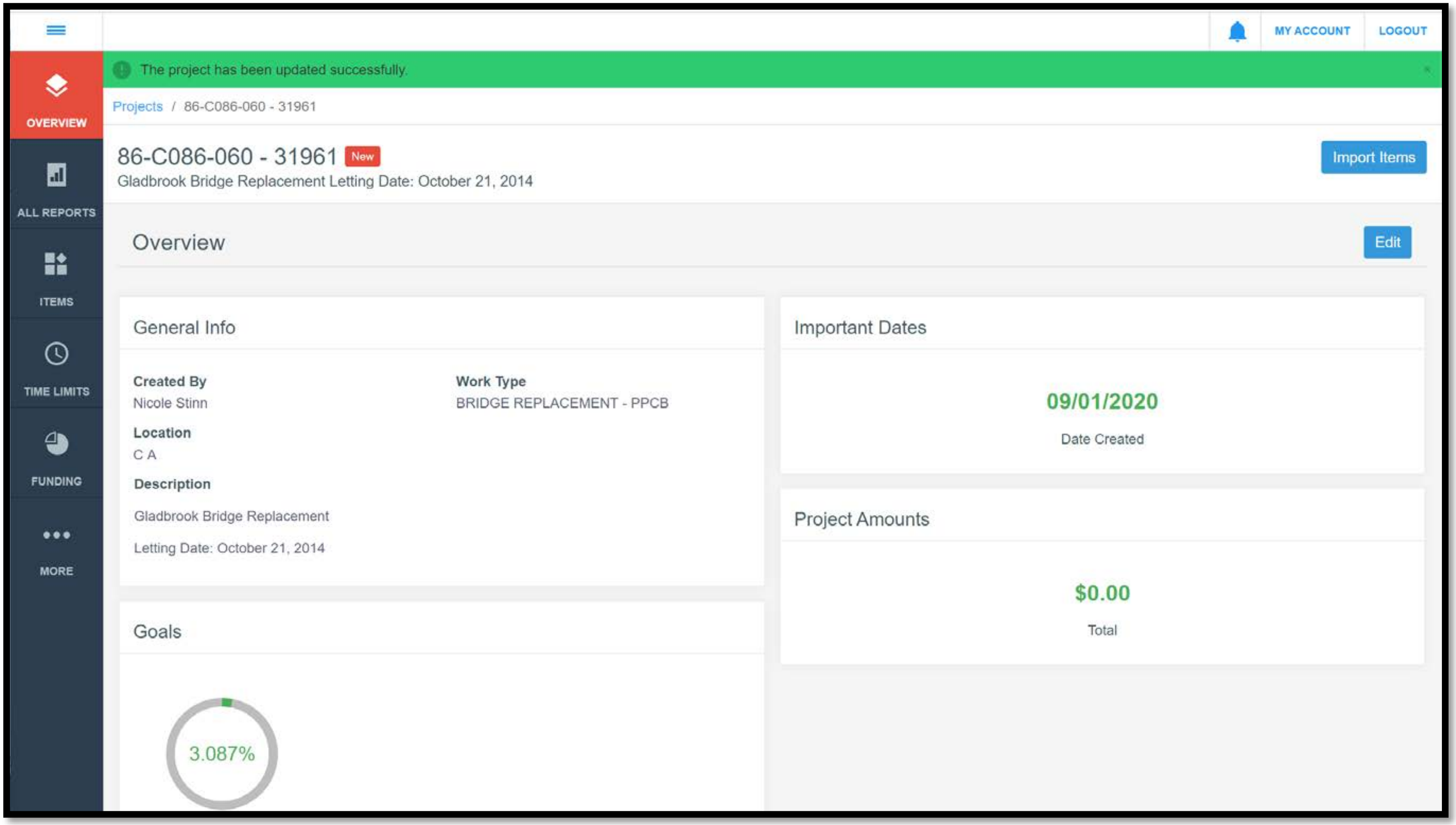
A screen will appear in which you will enter some of the basic overview information for the new project.

- 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."

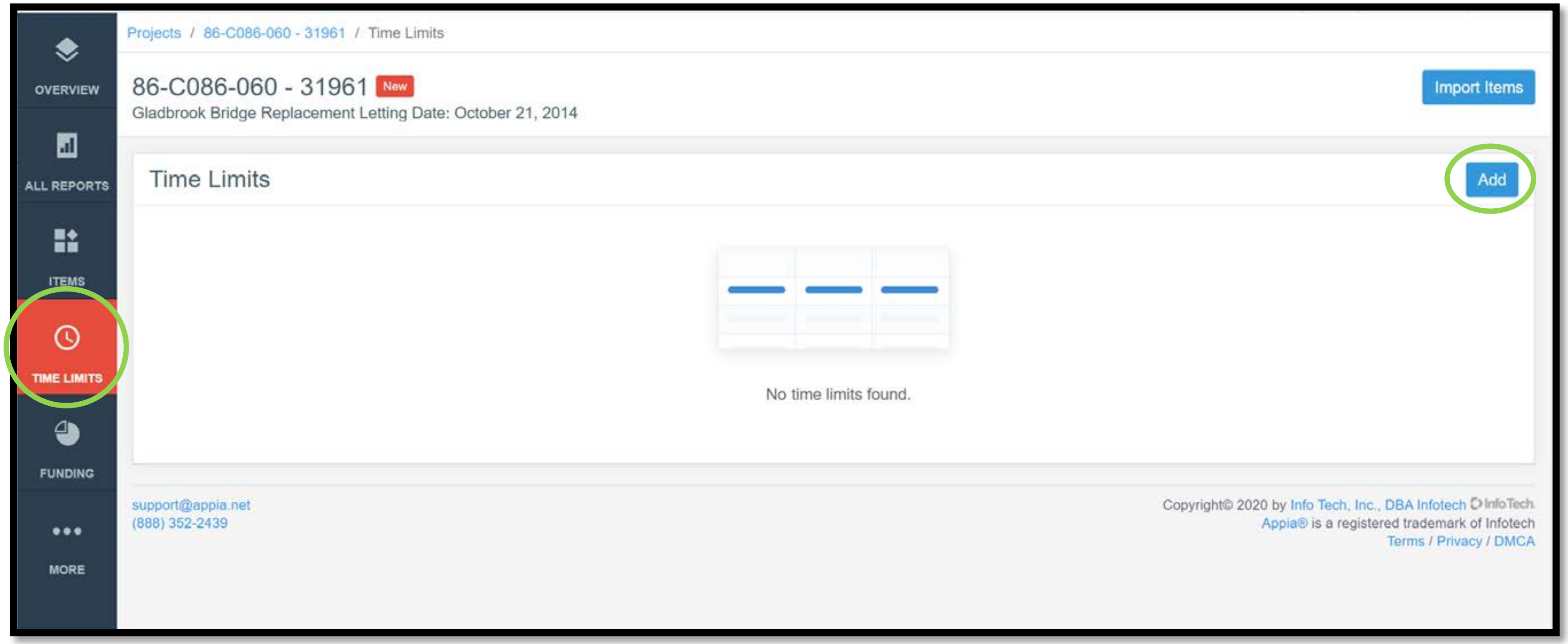
Click “Save” when finished entering information.



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



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.



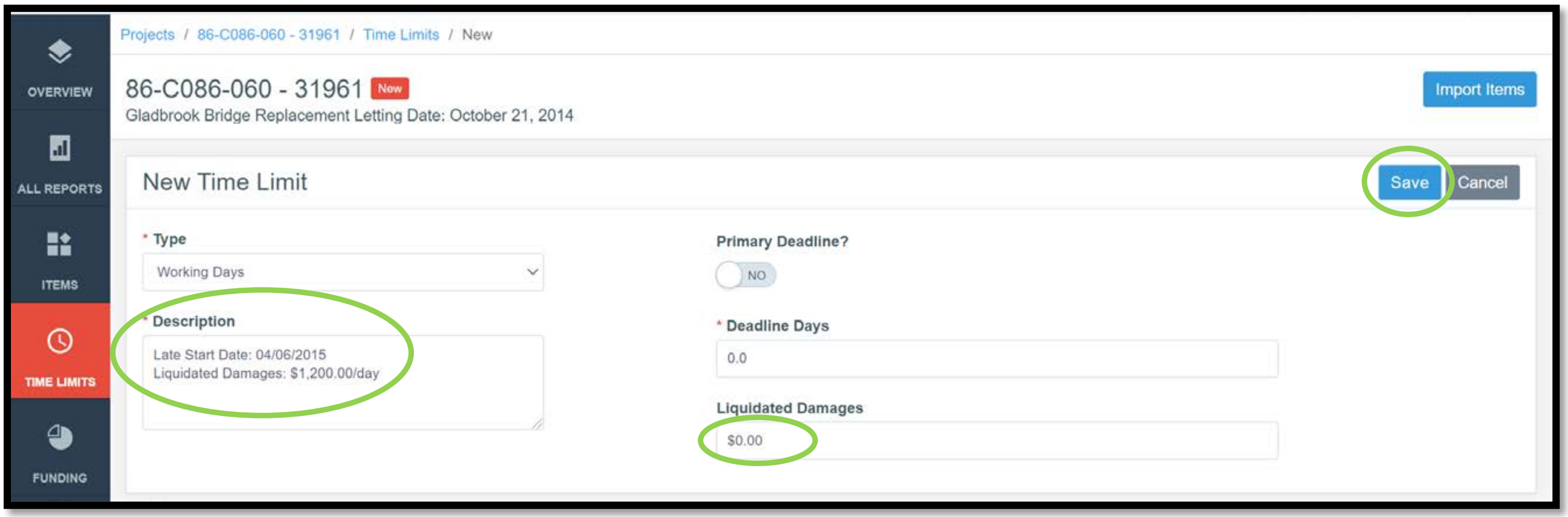
This screen will appear. Enter the time constraint information for your project. All of this information can be found on the contract.

- 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**.

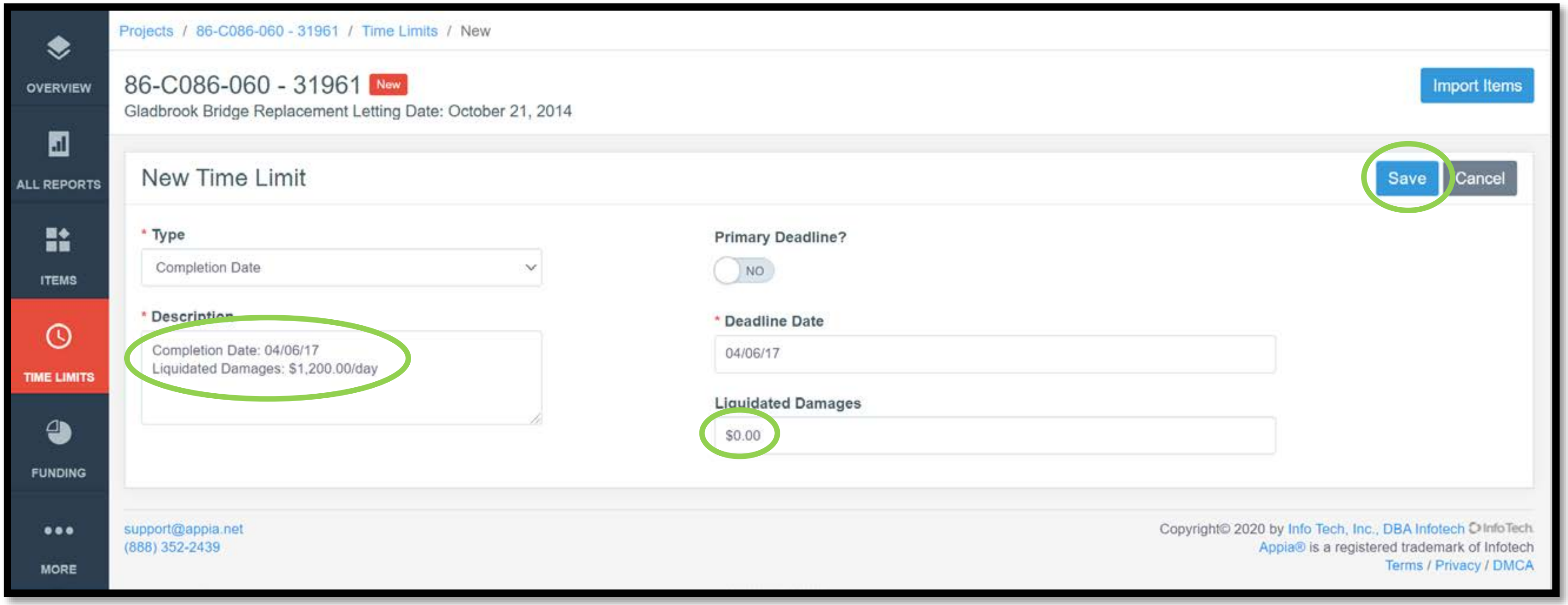
- Note: Appia does NOT automatically start charging working days according to what you enter here. Time charges always have to be manual inputs.
- Once the working day or calendar day limit is reached, or the completion date is exceeded, according to the charges you record in the Time Limits section, 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.

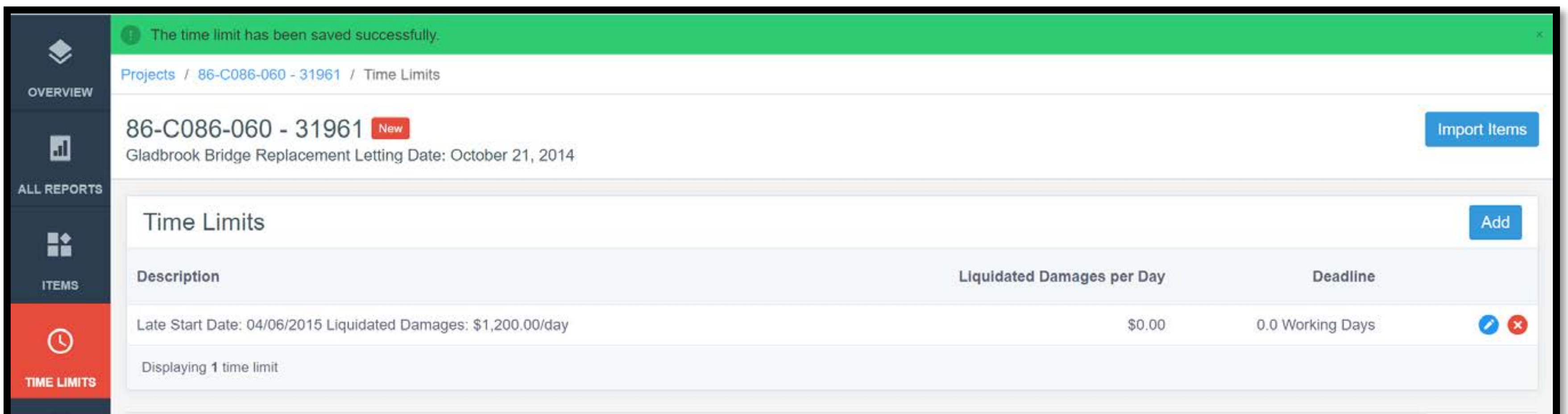
Working Days option picked



Completion Date option picked



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

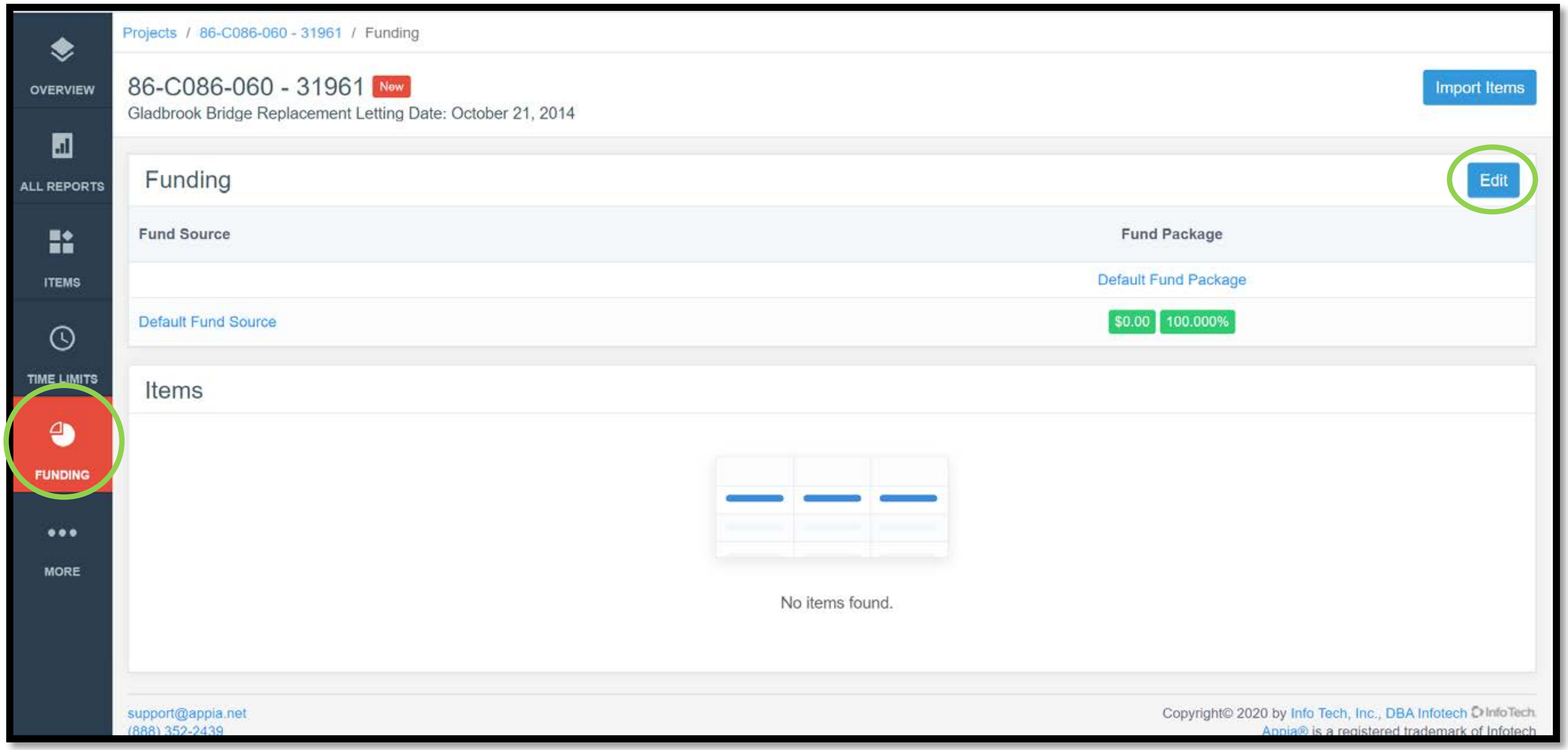


4 - Creating Funding Packages and Sources

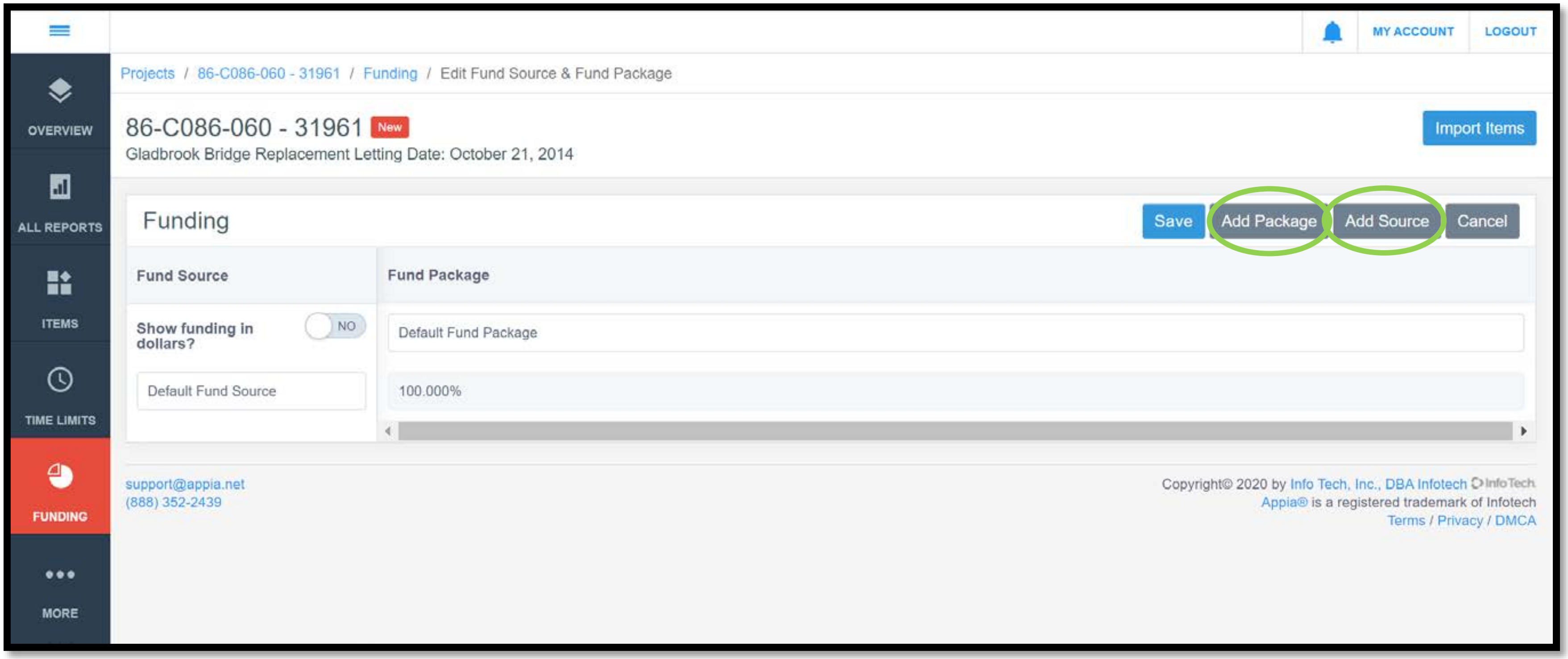
Note: If the .json file provided by Local Systems is imported to set up the project, all of the funding package and funding source for the original contract will be set up automatically. This section need only be used if funding is added or changed throughout the course of the project.

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 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.)



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.

<u>Counties</u>
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.

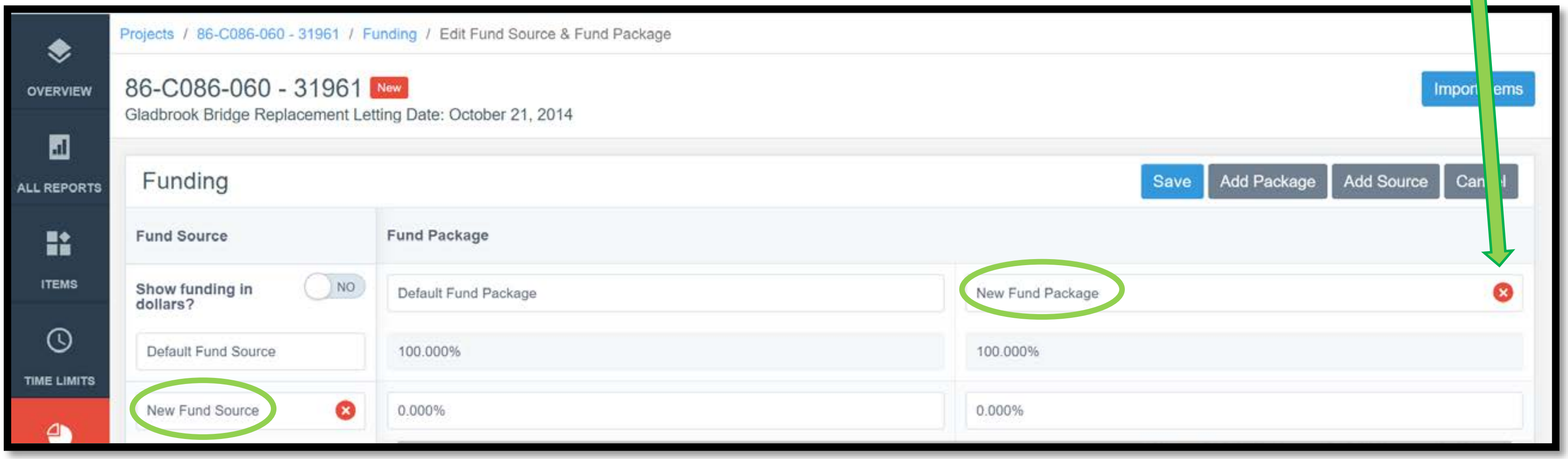
- Examples of funding **sources** in a FM **package** may include but are not limited to:
    - An STBG project on an FM route containing both STBG and FM funds.
    - An STBG project on an FM route containing both STBG and local funds.
    - An STBG project on an FM route containing both STBG and HSIP/TSIP/CSTEP/other 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

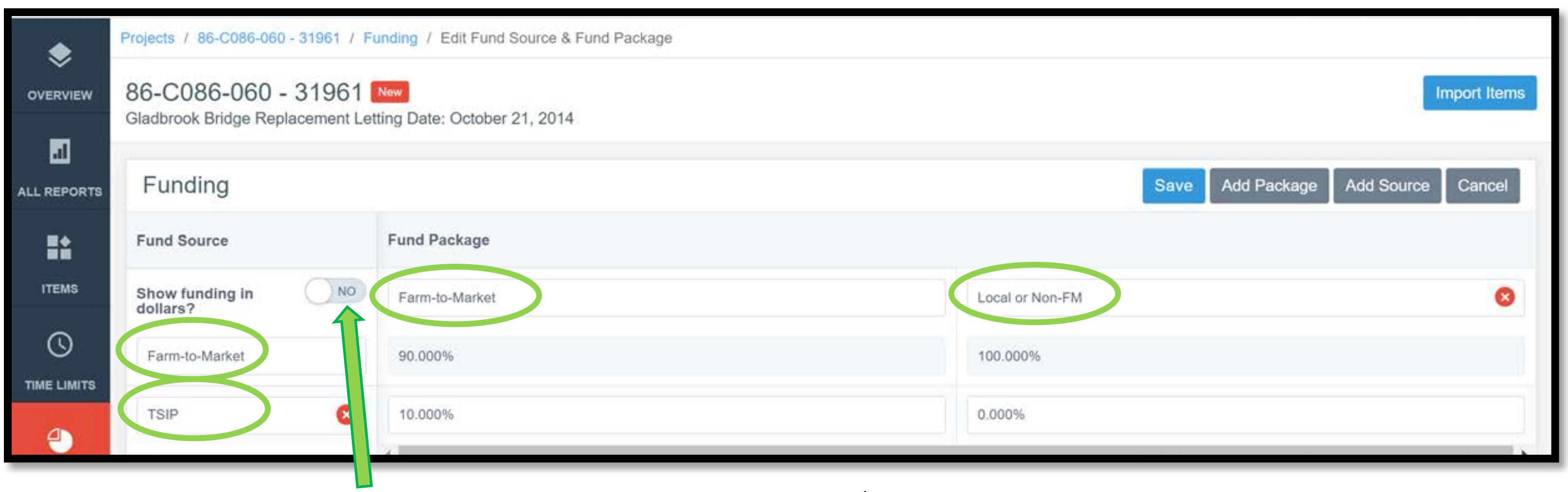
Since all city projects are locally paid and then reimbursed, the local must do the work of separating out costs into different funding packages. Therefore, since the DOT is not having to process payments from multiple accounts shown on a voucher, from a DOT payment perspective, there is no **requirement** 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 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.



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.



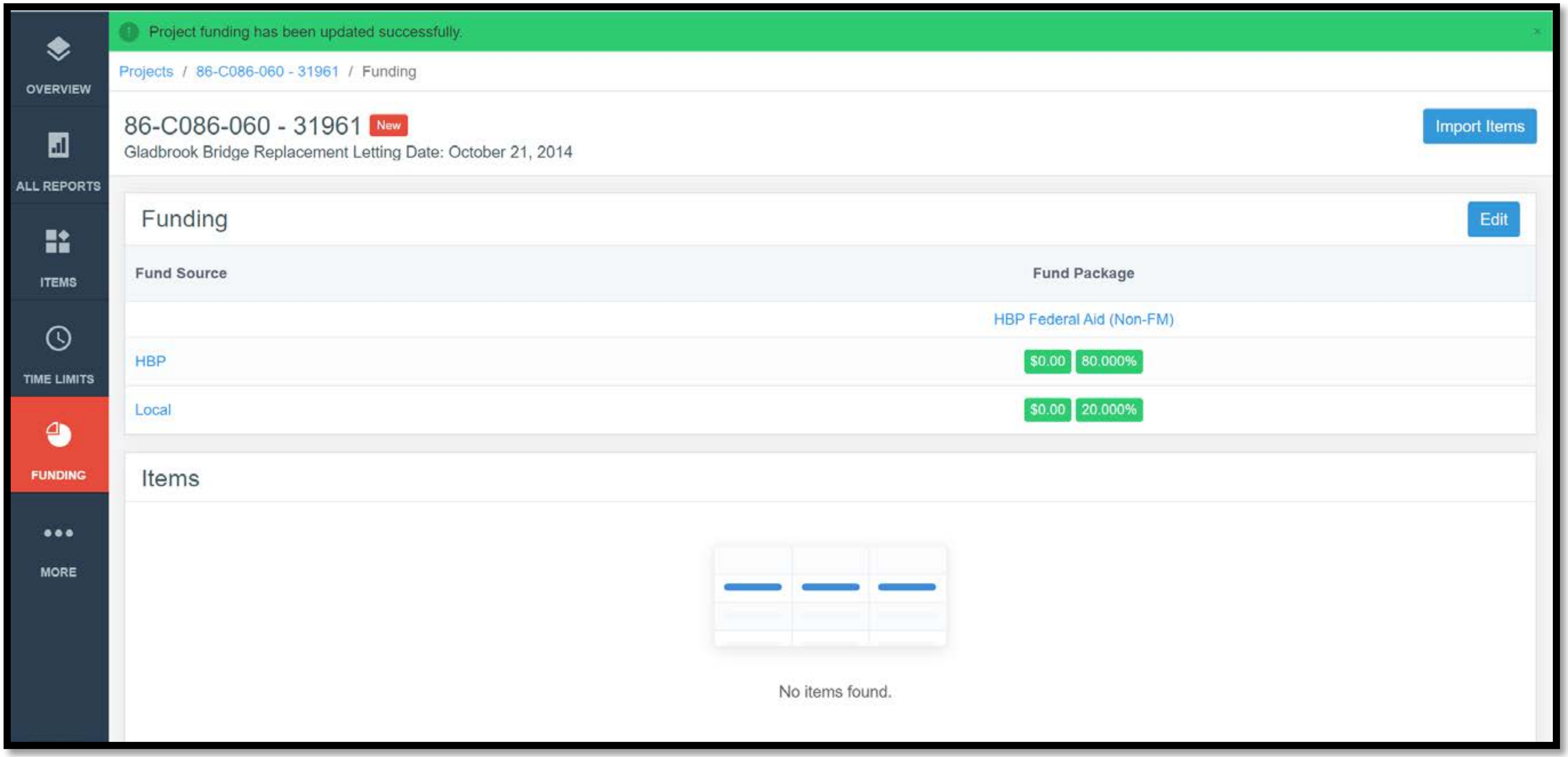
Also, note that the toggle switch can be used to switch from a % view to a $ view. **However, at this time, there is no way to “cap” and prioritize funding sources.** The DOT is currently working with Infotech to build this functionality into Appia.

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%.

Click “Save” when finished entering funding information.

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.

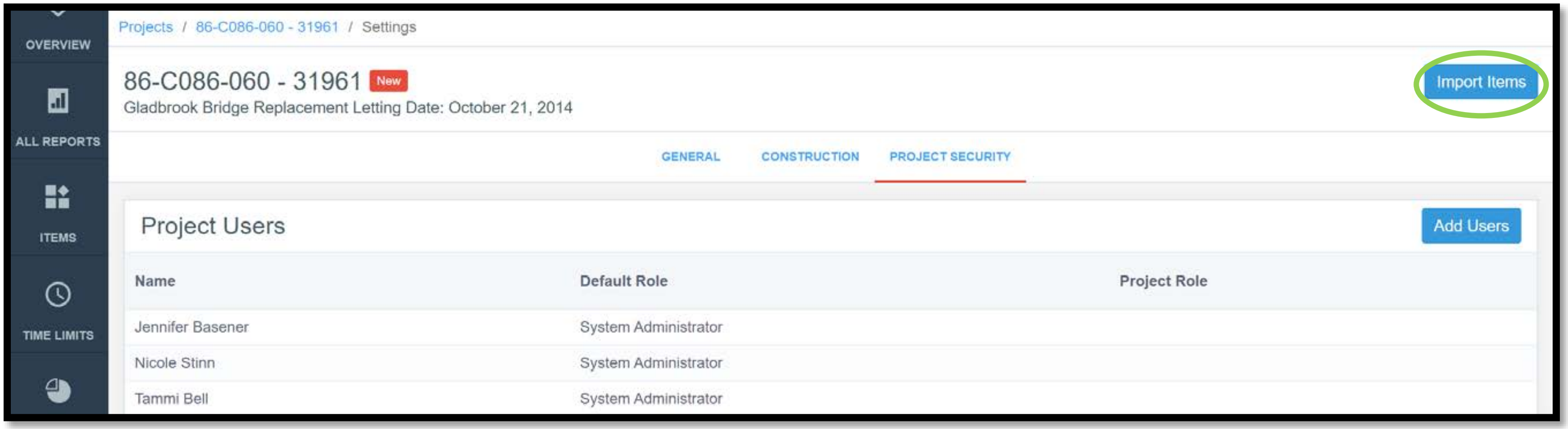


5 - Creating Bid Items by Importing the .csv Bid Tabulation File

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.

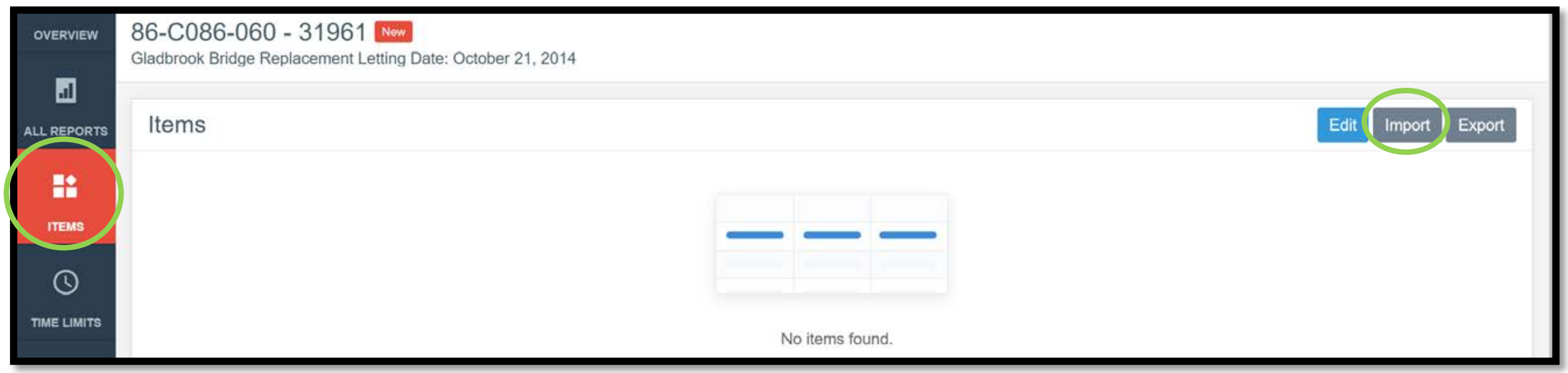
The last step before "Advance to Construction" is to add the bid items, quantities, and unit prices to the project.

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



OR

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

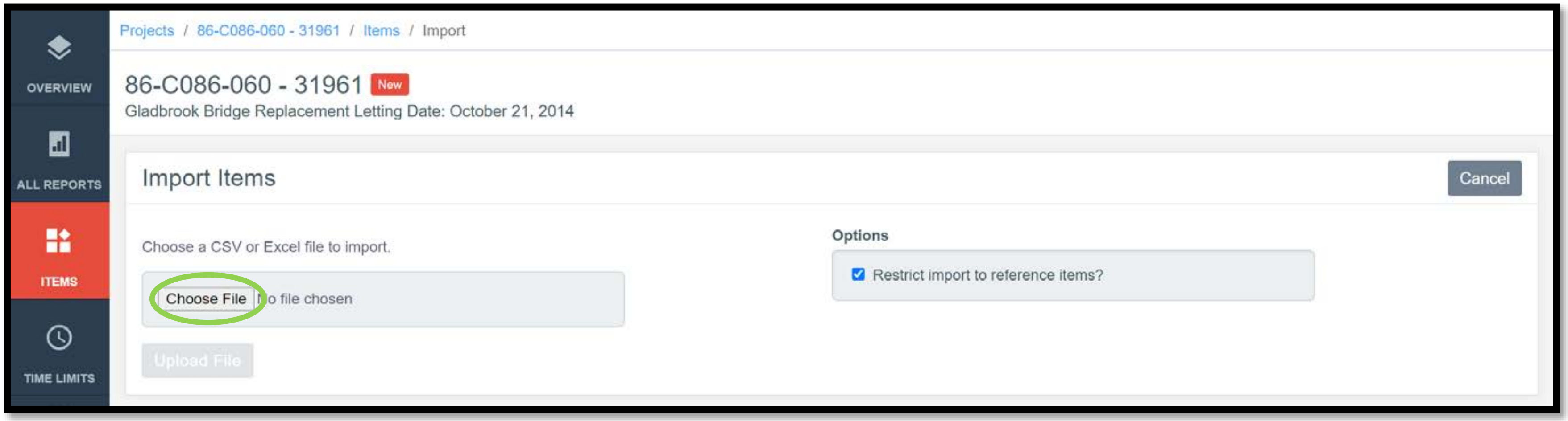


Either path will bring you to this screen.

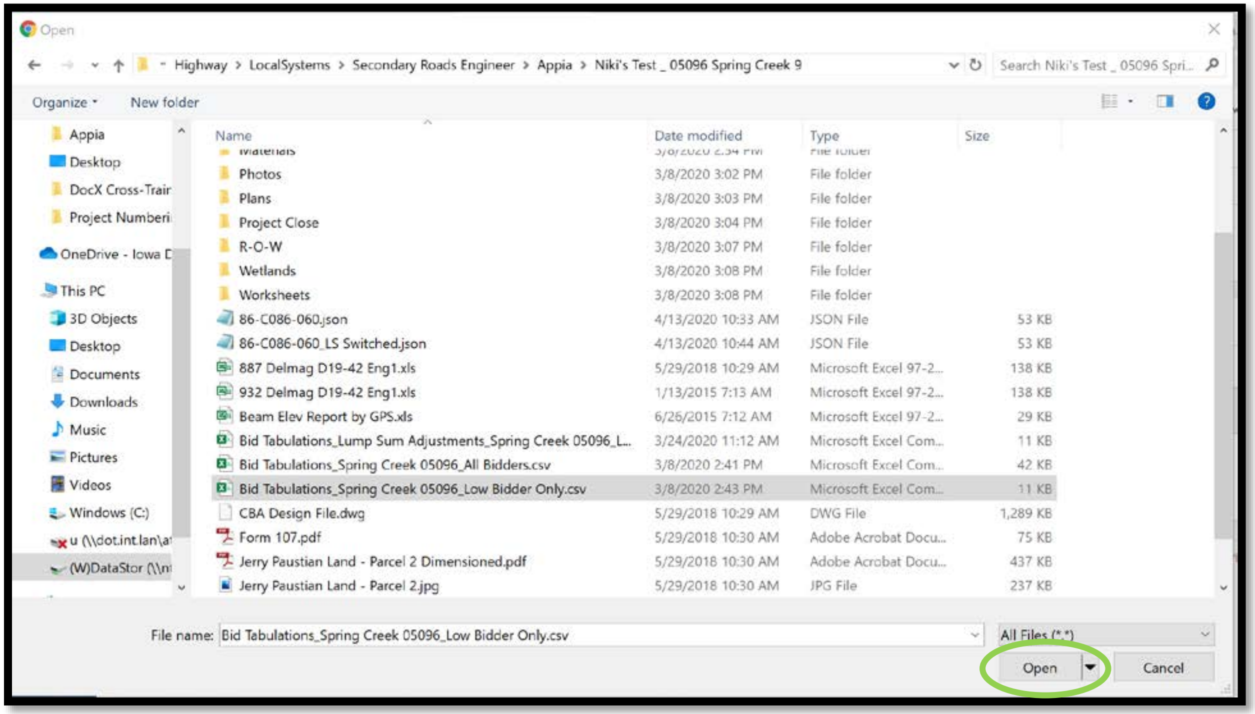
STOP: If your project contains multiple funding packages, open your .csv bid tabulation file and alter it as described in the Contracts with Multiple Projects/Divisions section before continuing as shown below.

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.

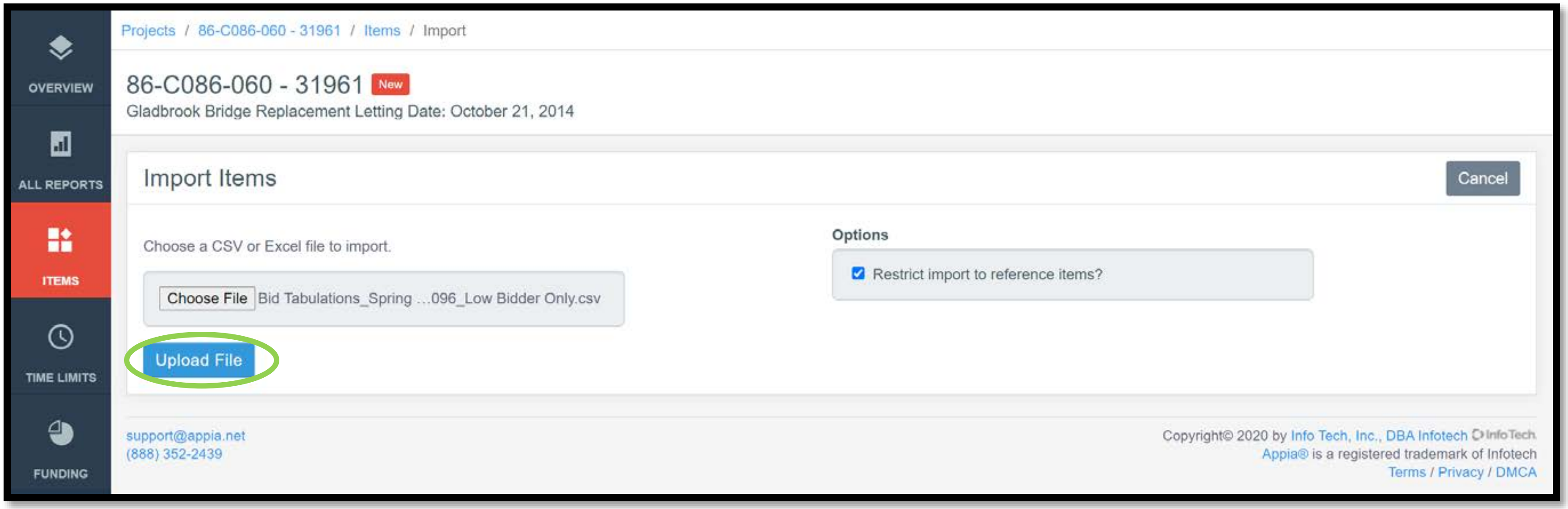


Select the desired file from your file explorer window and click “Open”.



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

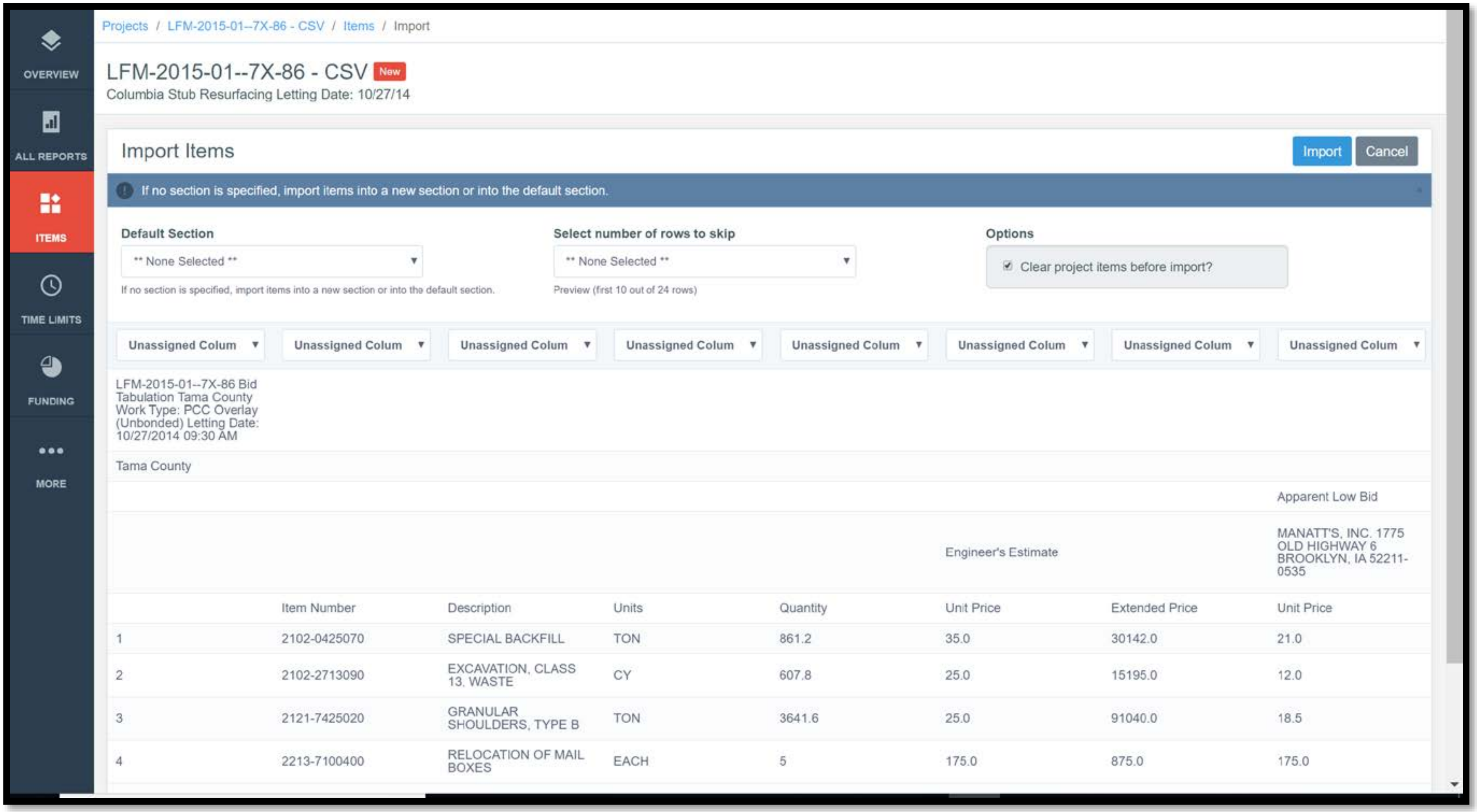
Leave the “Restrict import to reference items?” box checked.
Click on “Upload File”.



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

DOT File – No longer applicable

ICEA Service Bureau File

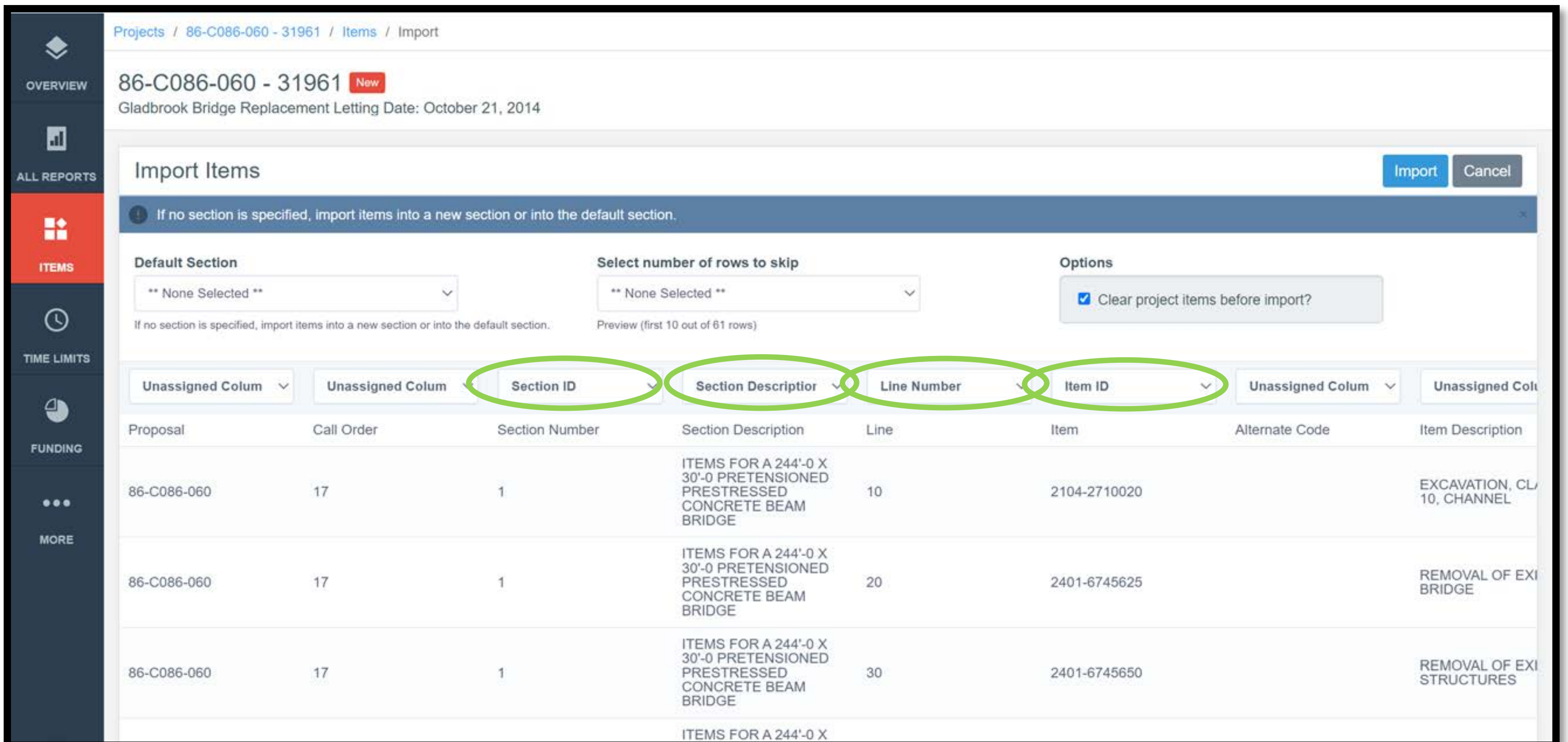


Use the drop-down boxes along the top to assign the column names.

Columns that must have names assigned:

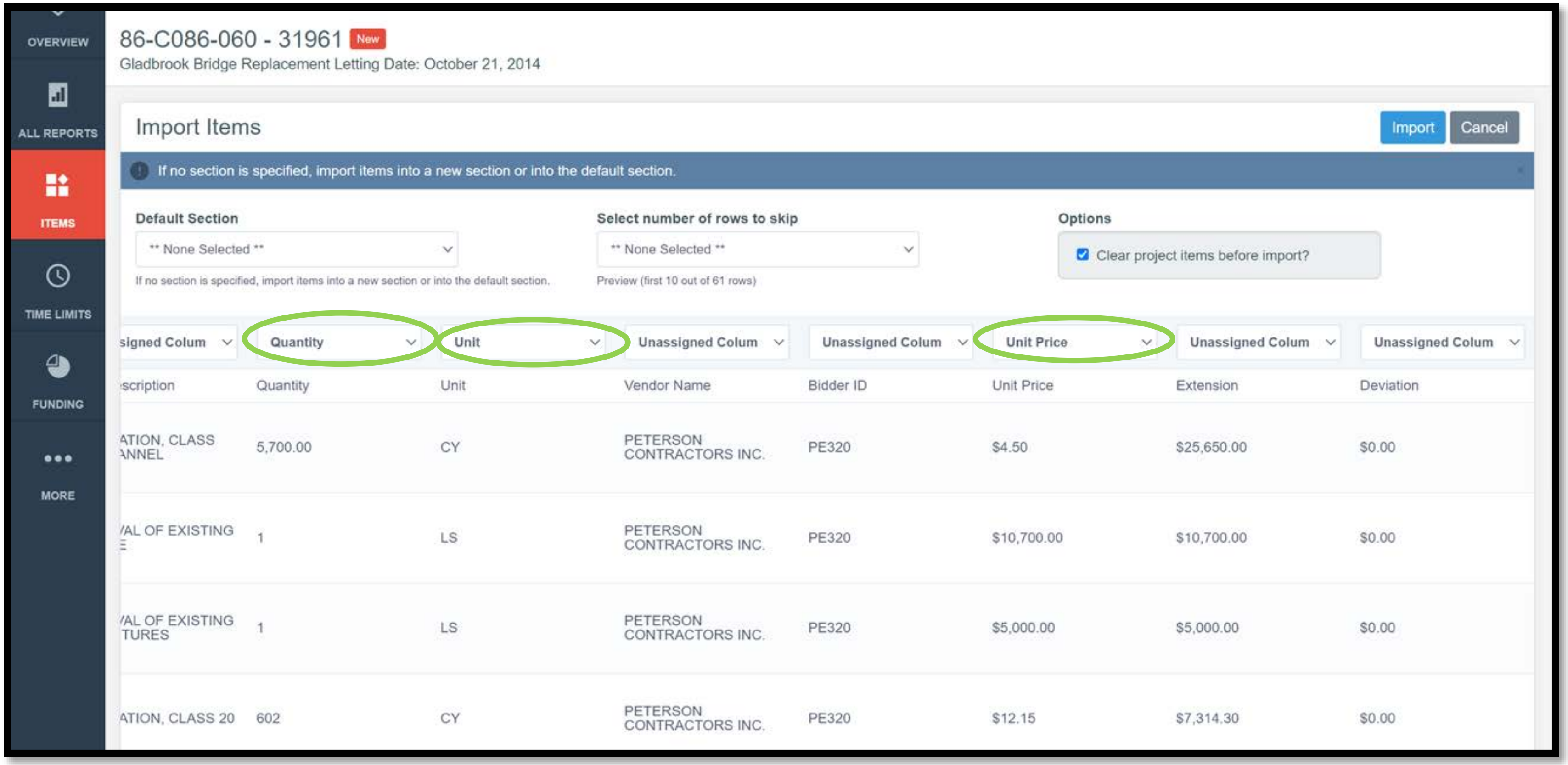
- “Section ID” (Required when there is more than one division or project)
- “Section Description” (required for multiple-section projects only)
- “Line Number”
- “Item ID”
- “Quantity”
- “Unit”
- “Unit Price”

DOT File



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.

			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	STRU[illegible] CONCRE[illegible] 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


OVERVIEW
ALL REPORTS
ITEMS
TIME LIMITS
FUNDING
MORE
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?
signed Colum
Quantity
Unit
Unassigned Colum
Unassigned Colum
Unit Price
Unassigned Colum
Unassigned Colum
scription
Quantity
Unit
Vendor Name
Bidder ID
Unit Price
Extension
Deviation
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PE320
$4.50
$25,650.00
$0.00
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LS
PETERSON CONTRACTORS INC.
PE320
$10,700.00
$10,700.00
$0.00
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PE320
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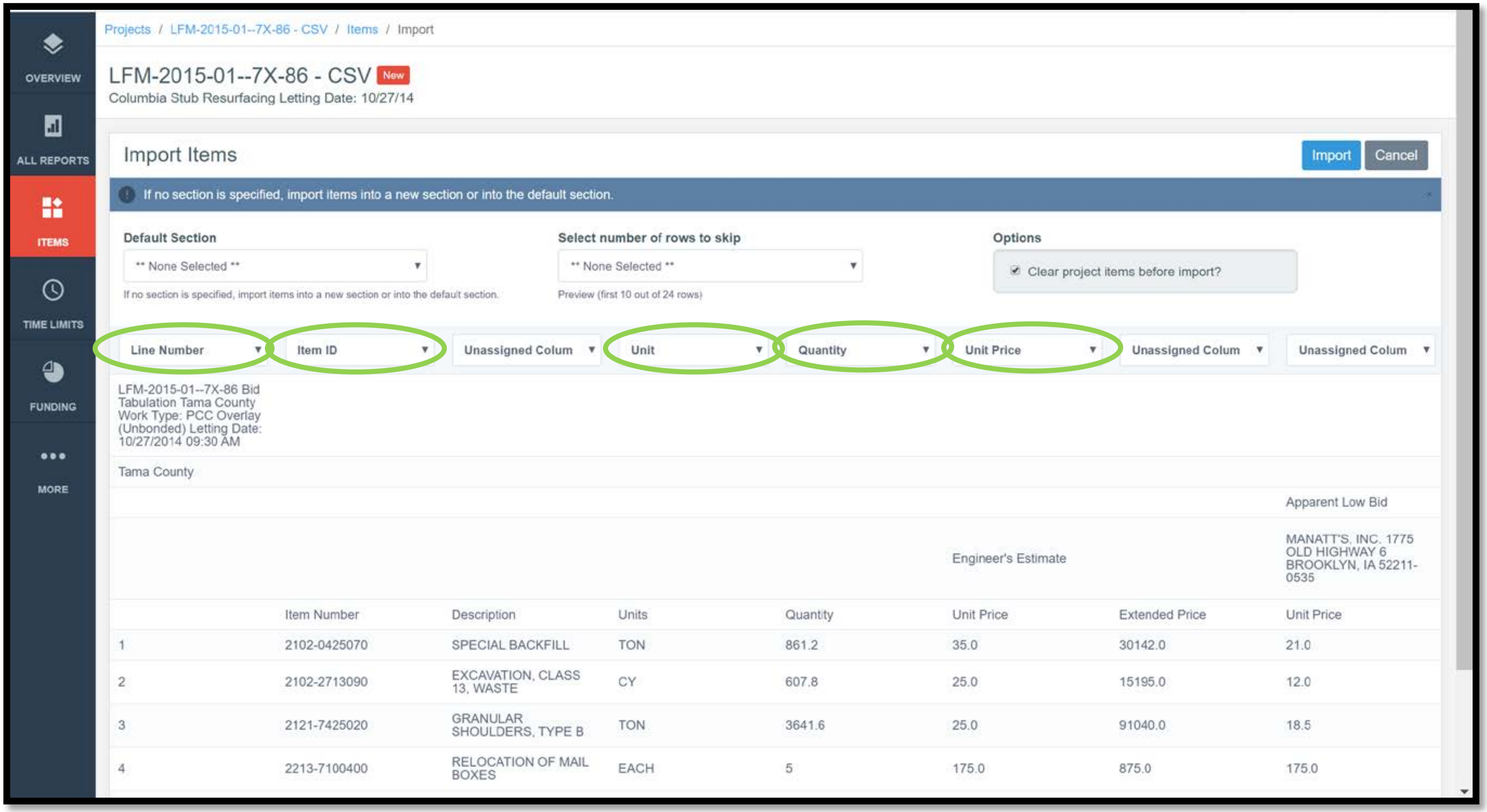
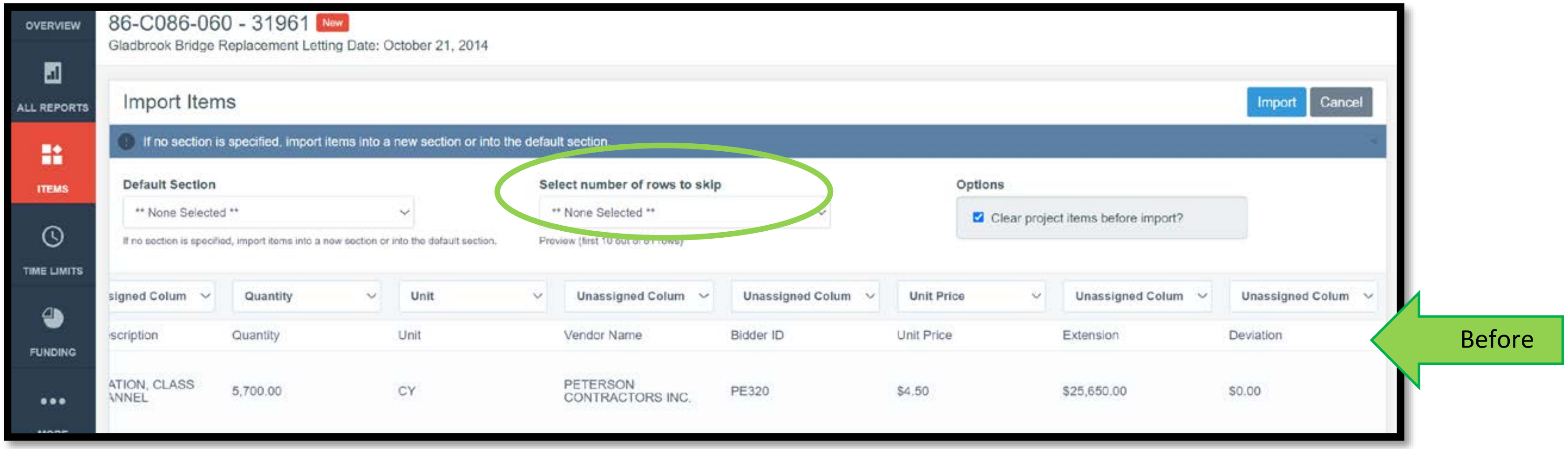
$5,000.00
$0.00
ATION, CLASS 20
602
CY
PETERSON CONTRACTORS INC.
PE320
$12.15
$7,314.30
$0.00

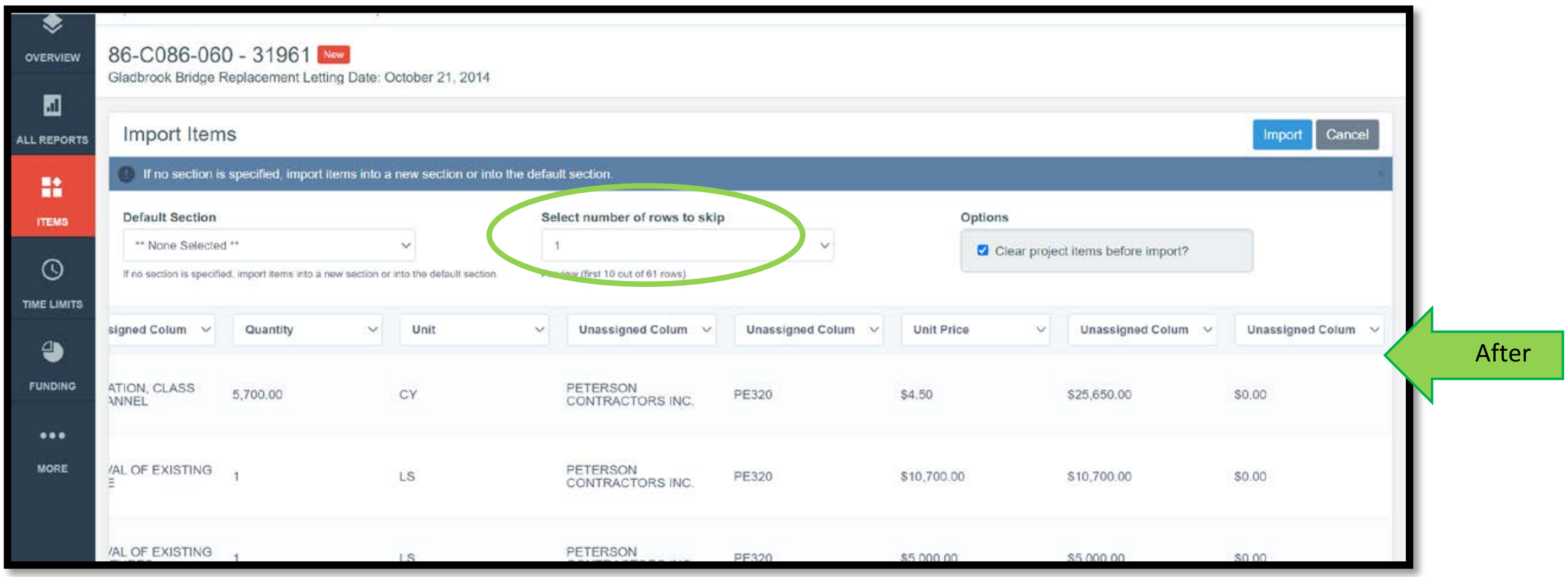
ICEA Service Bureau File



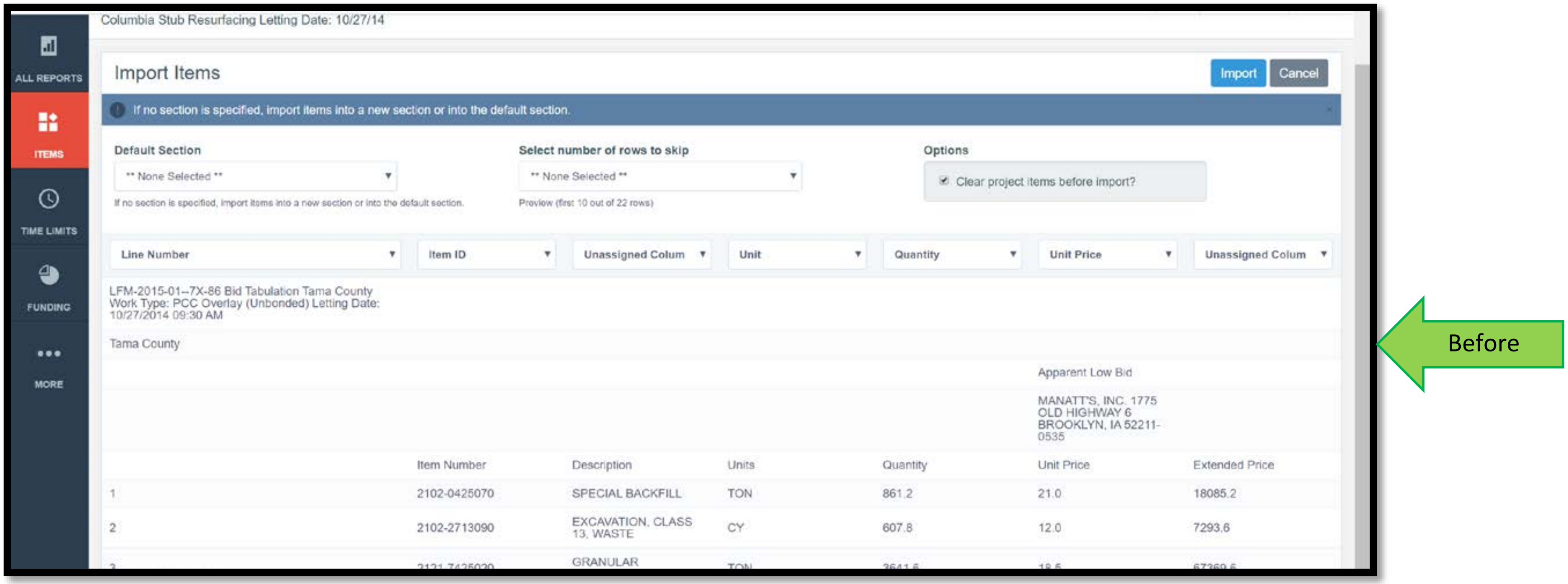
After you have named all of the necessary columns, select "5" for ICEA Service Bureau files or select the number of header rows contained in a file generated from another source. This will tell Appia to take out the header line when it imports the items and item information.

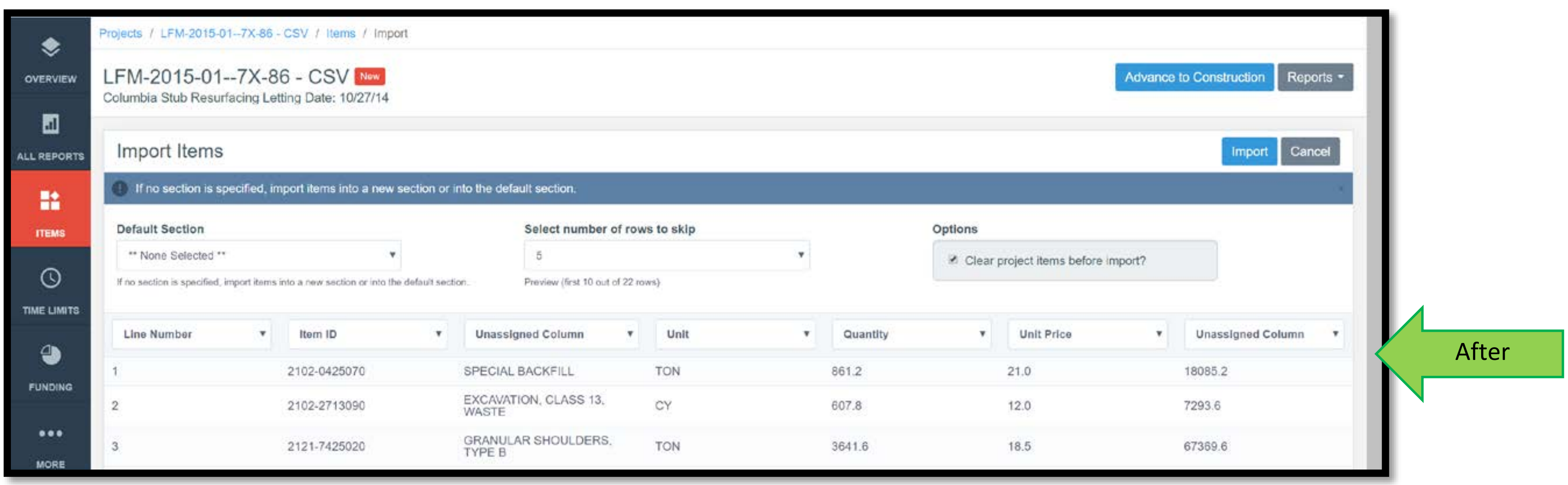
DOT File





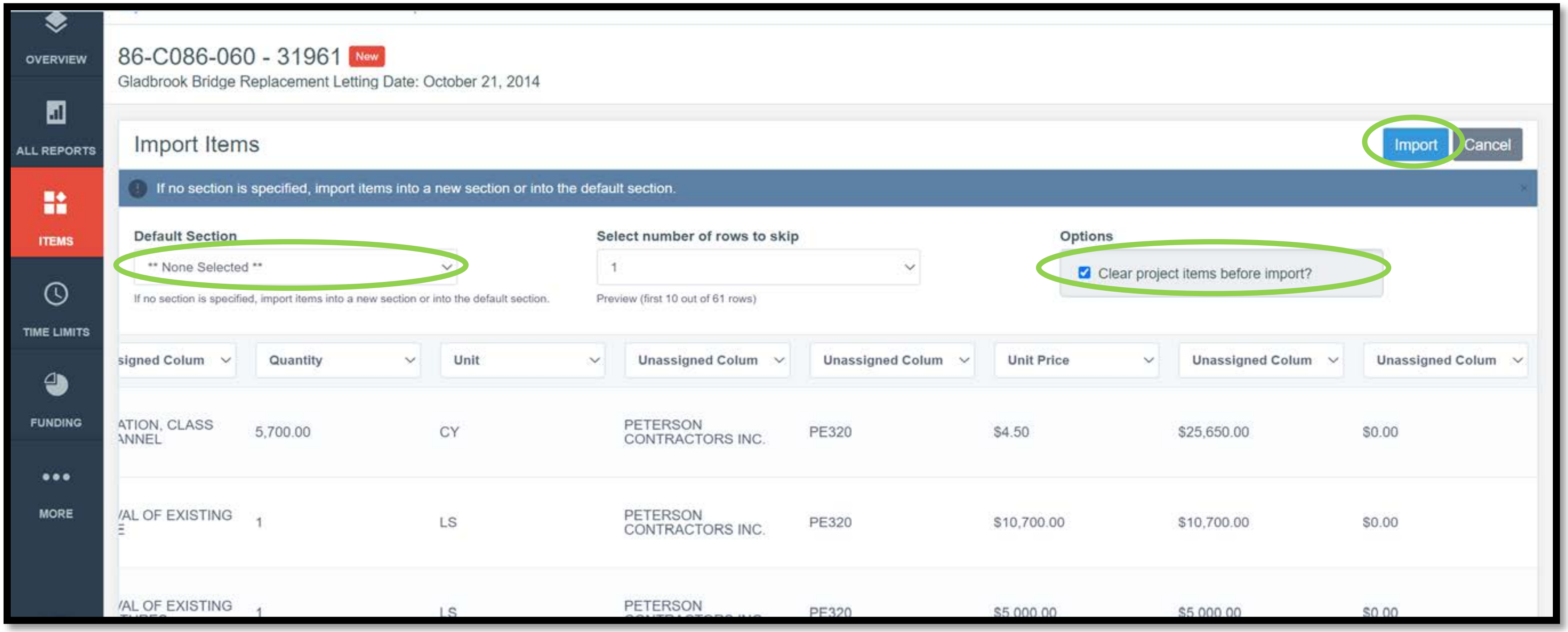
ICEA Service Bureau File



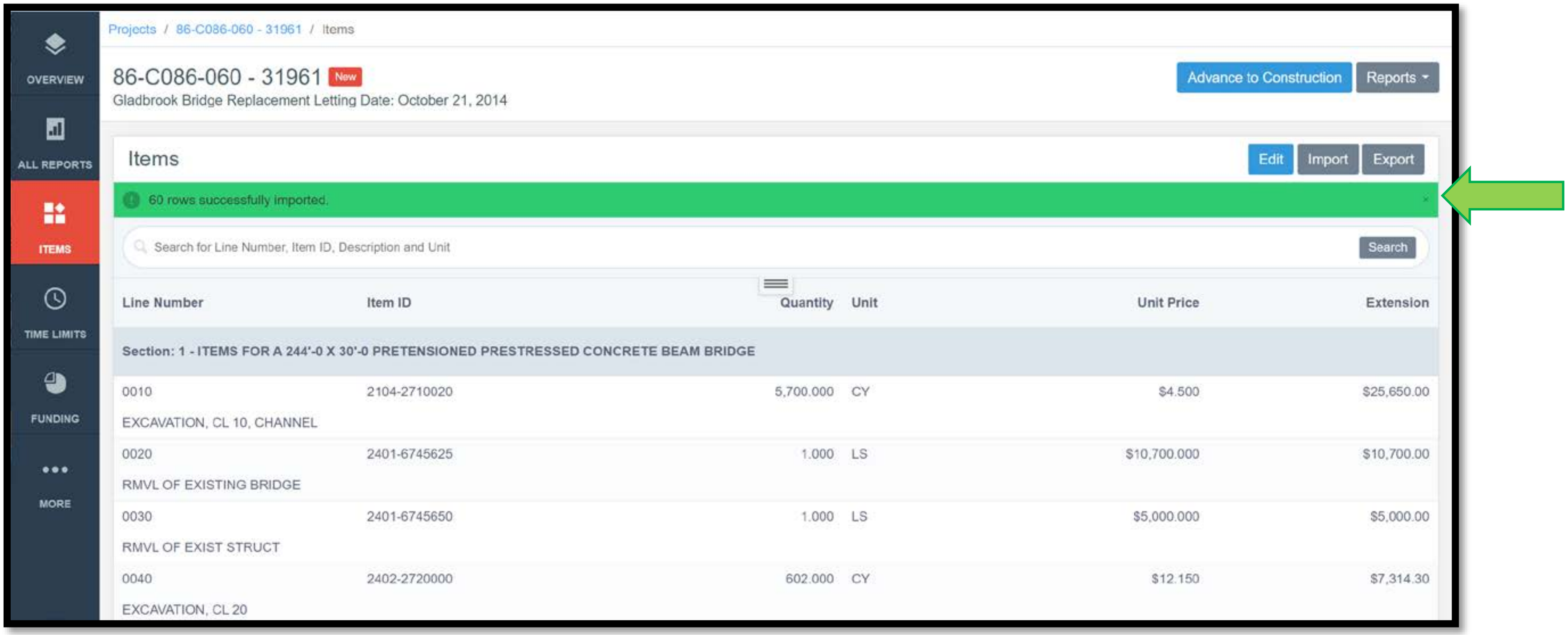


You do not need to do anything with the “Default Section” box unless you are only trying to import one section (one project in a tied contract or one division in a multiple-division contract) for some reason. Leave the “Clear project items before import” box checked.

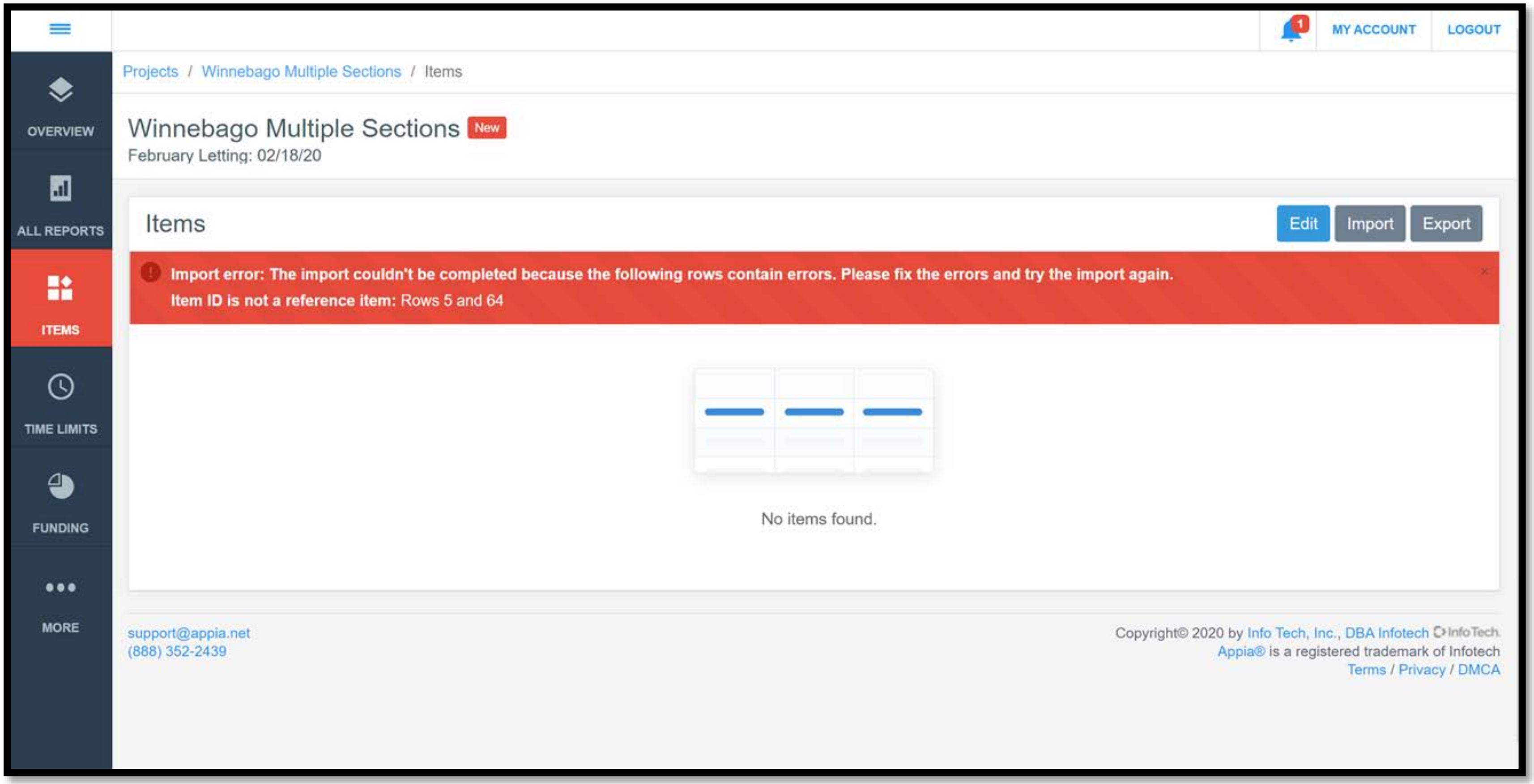
Click “Import”. (It may take a few seconds to process.)



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



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.)

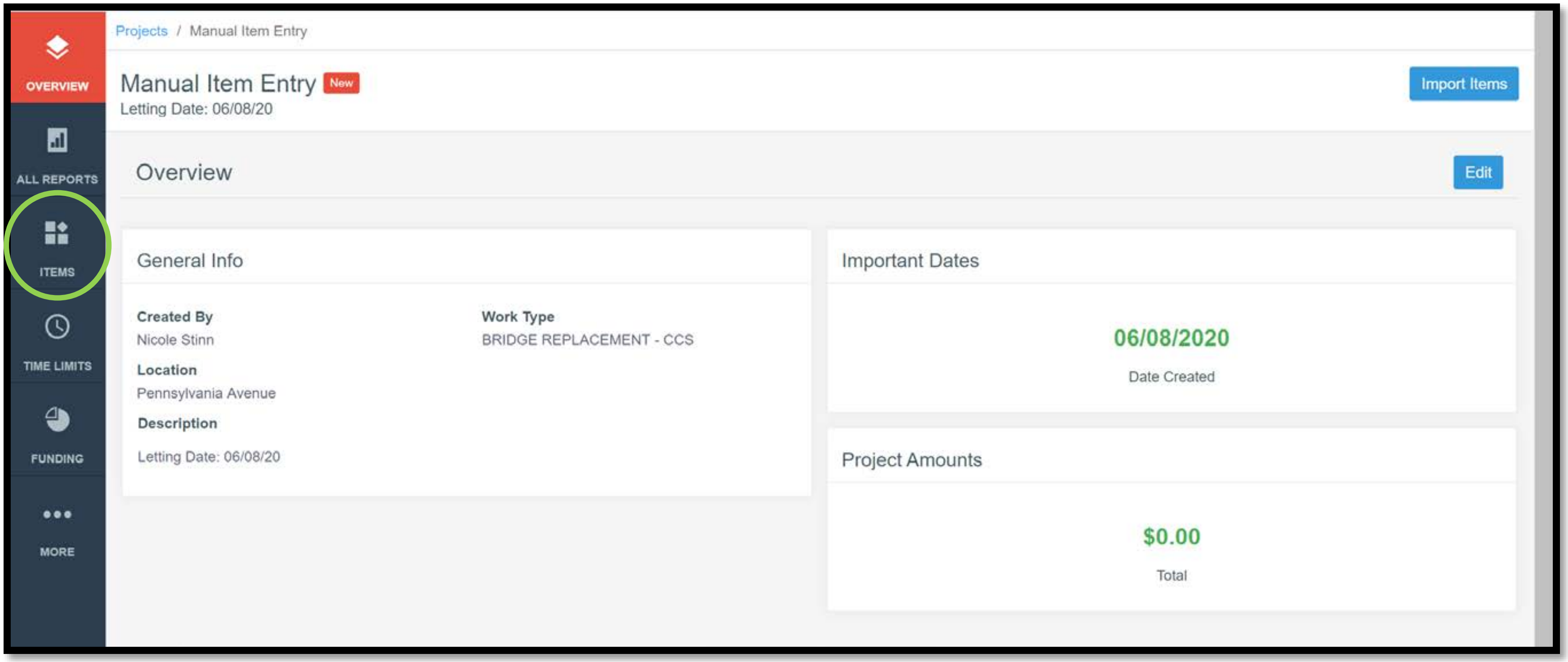


6 - Creating Bid Items Manually

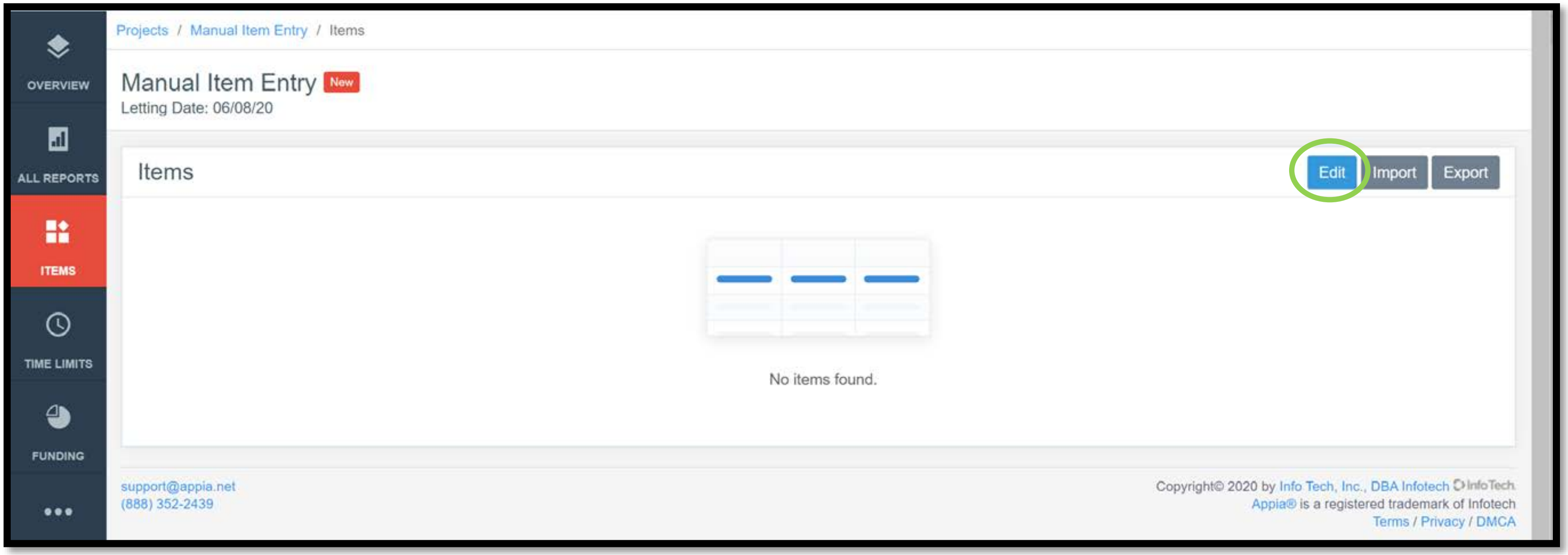
Note: If the contract is let through the Iowa DOT, the .json file provided by Local Systems should be used to set up the project, and the instructions in this section need not be used. Contact Doug Heeren if you are in need of a file for a DOT-let project but have not received one.

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

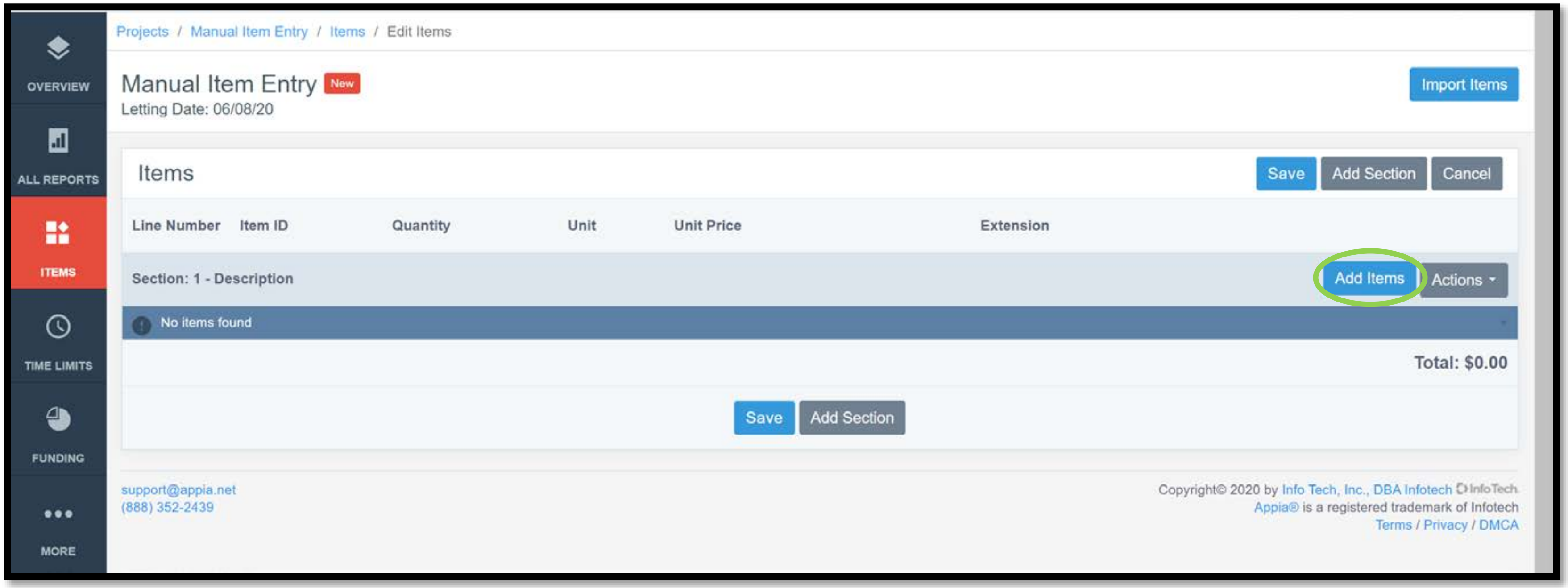
To do this, select the "Items" button from the left menu.



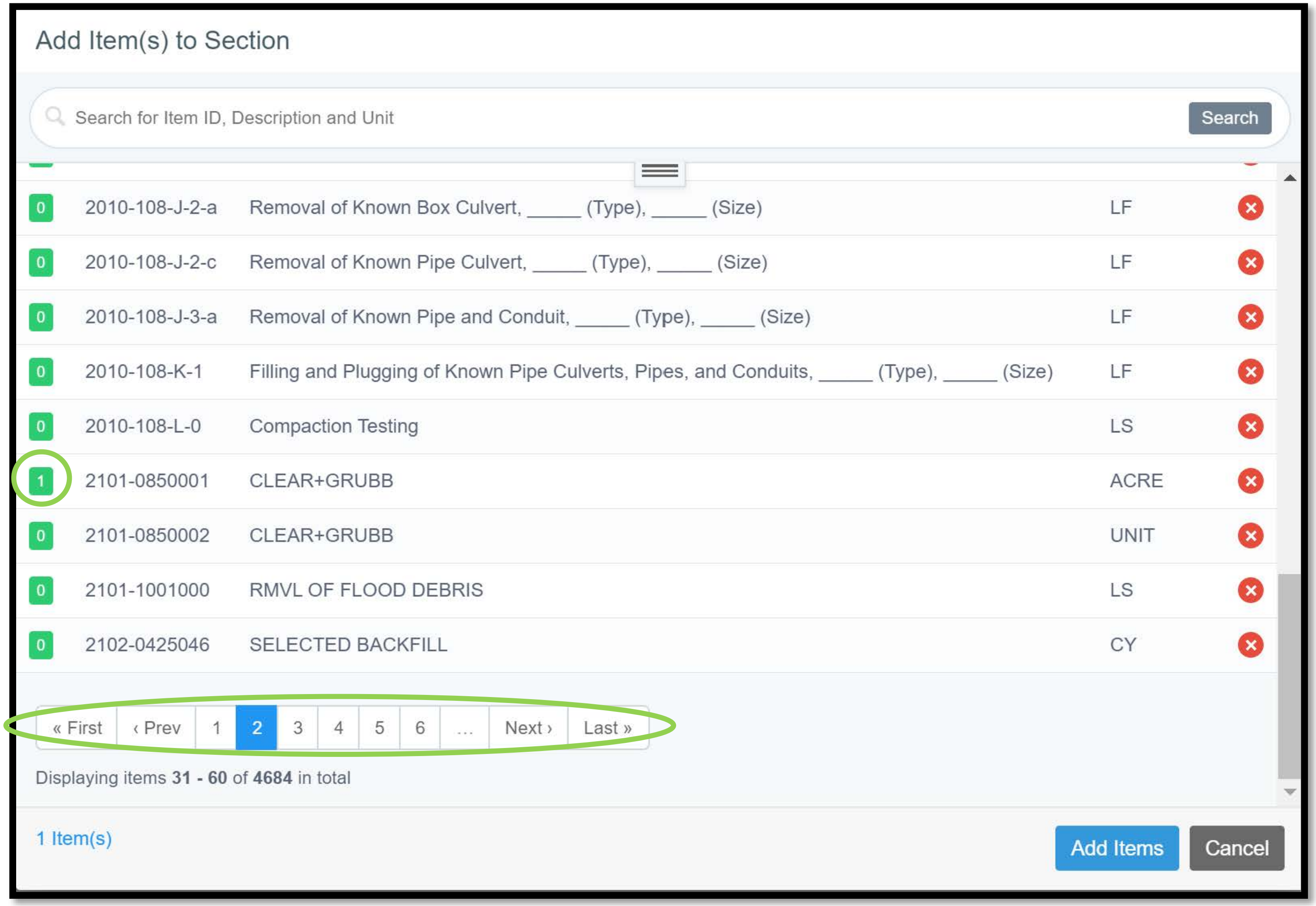
This screen will appear. Click on “Edit” in the top, right corner.



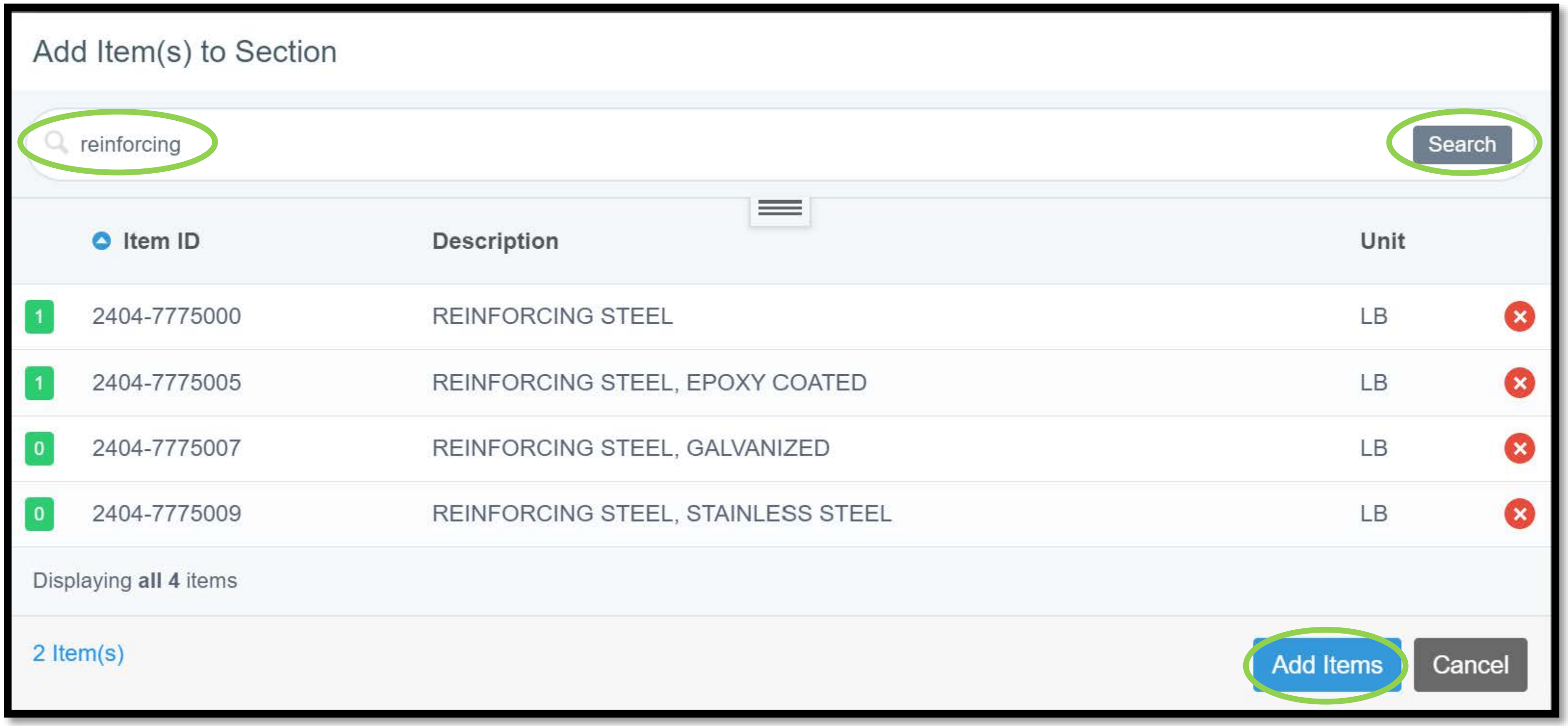
Click on "Add Items" near the middle of the page on the right side.



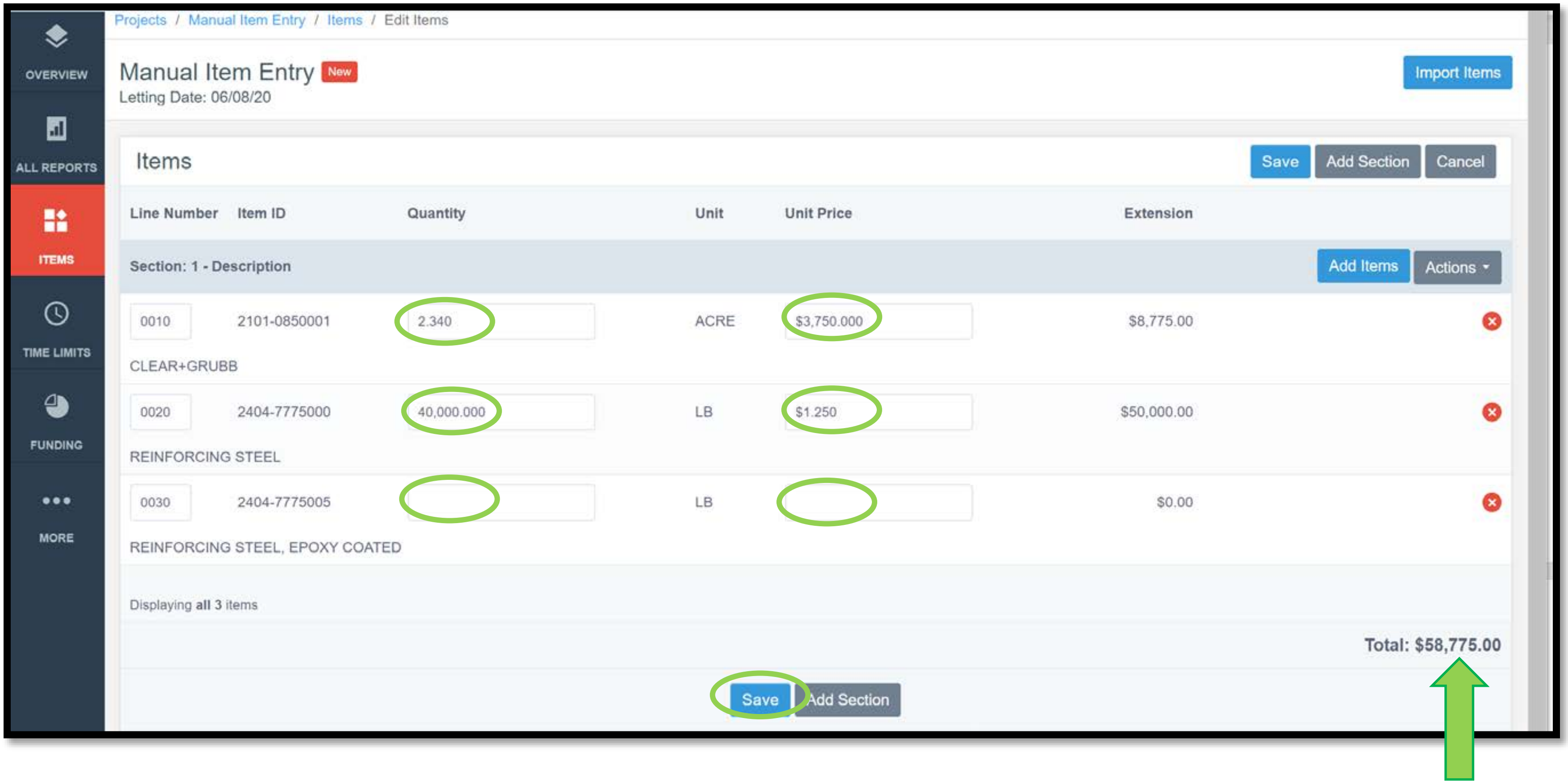
This pop-up window will appear showing a list of all bid items present in your reference data.
Scroll to the bottom to see the option to view additional pages of items.
Click on the desired items(s). When they have been selected, the number in the green box on the left will change to show how many occurrences 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.)



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.



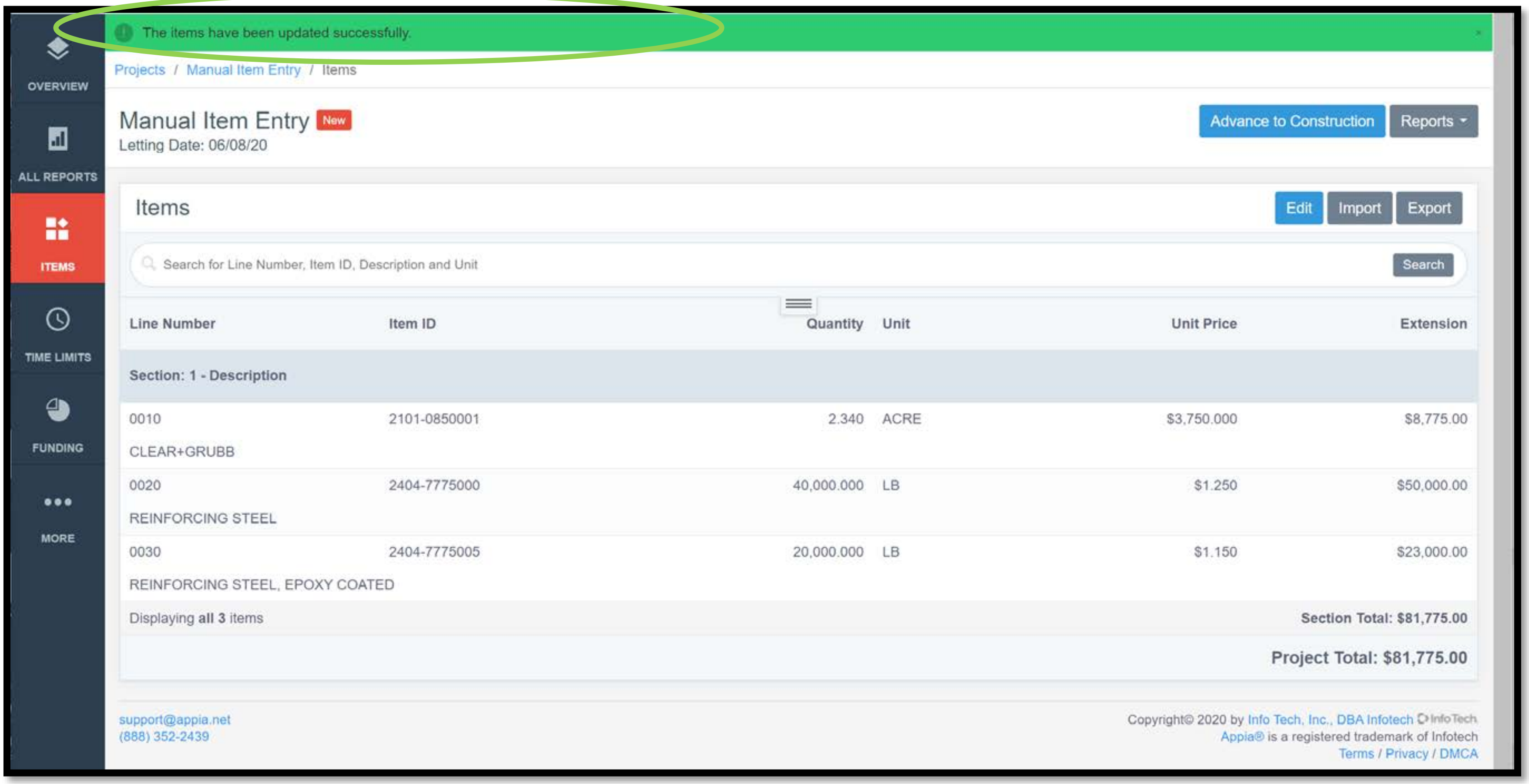
You will be taken back out to the Items screen where the added bid items will be shown. Blank fields will be present in the “Quantity” and “Unit Price” columns. You will need to fill these in with the information from your contract. The extended price will be calculated automatically.



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.

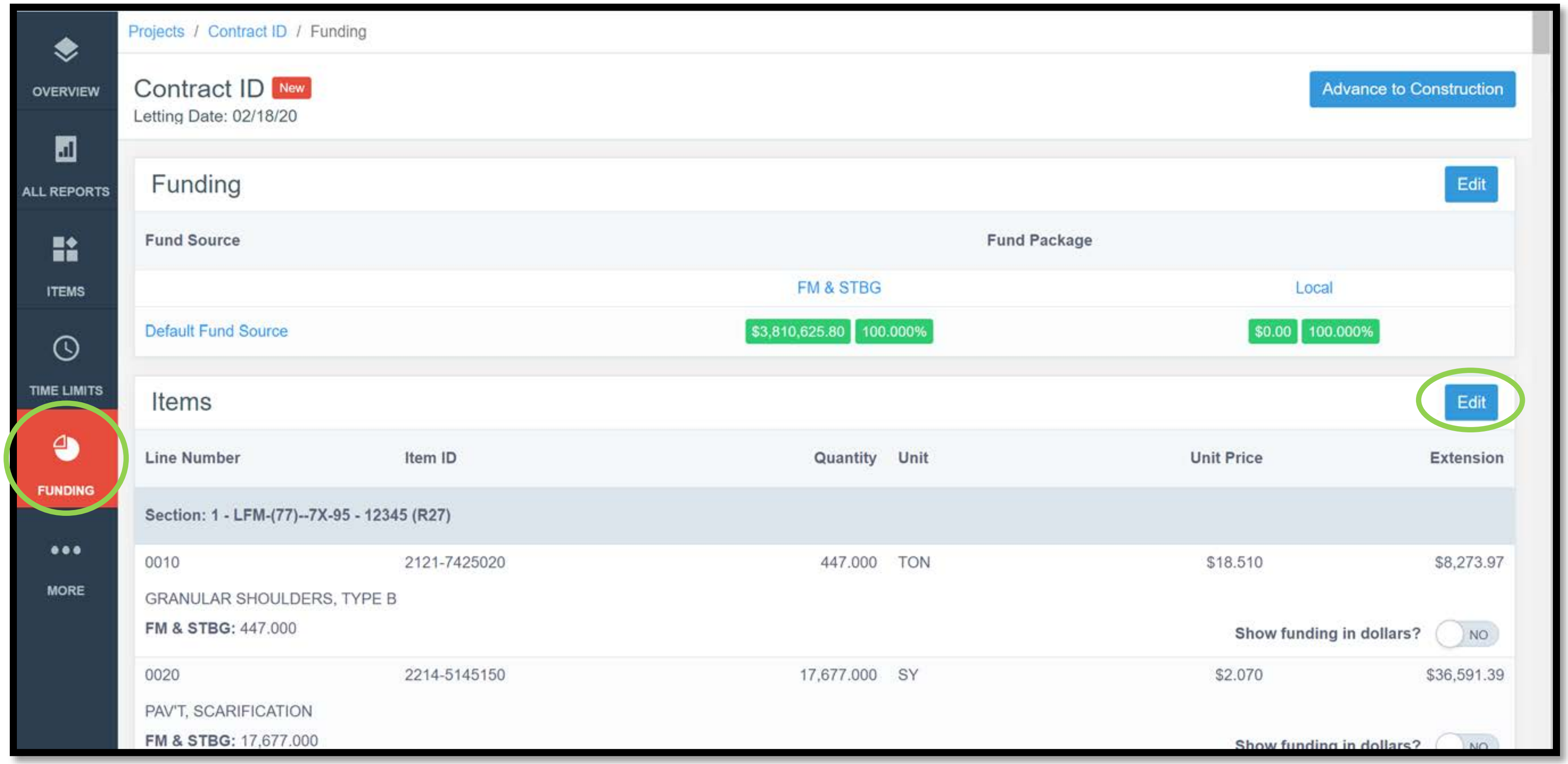


7 - Contracts with Multiple Funding Packages

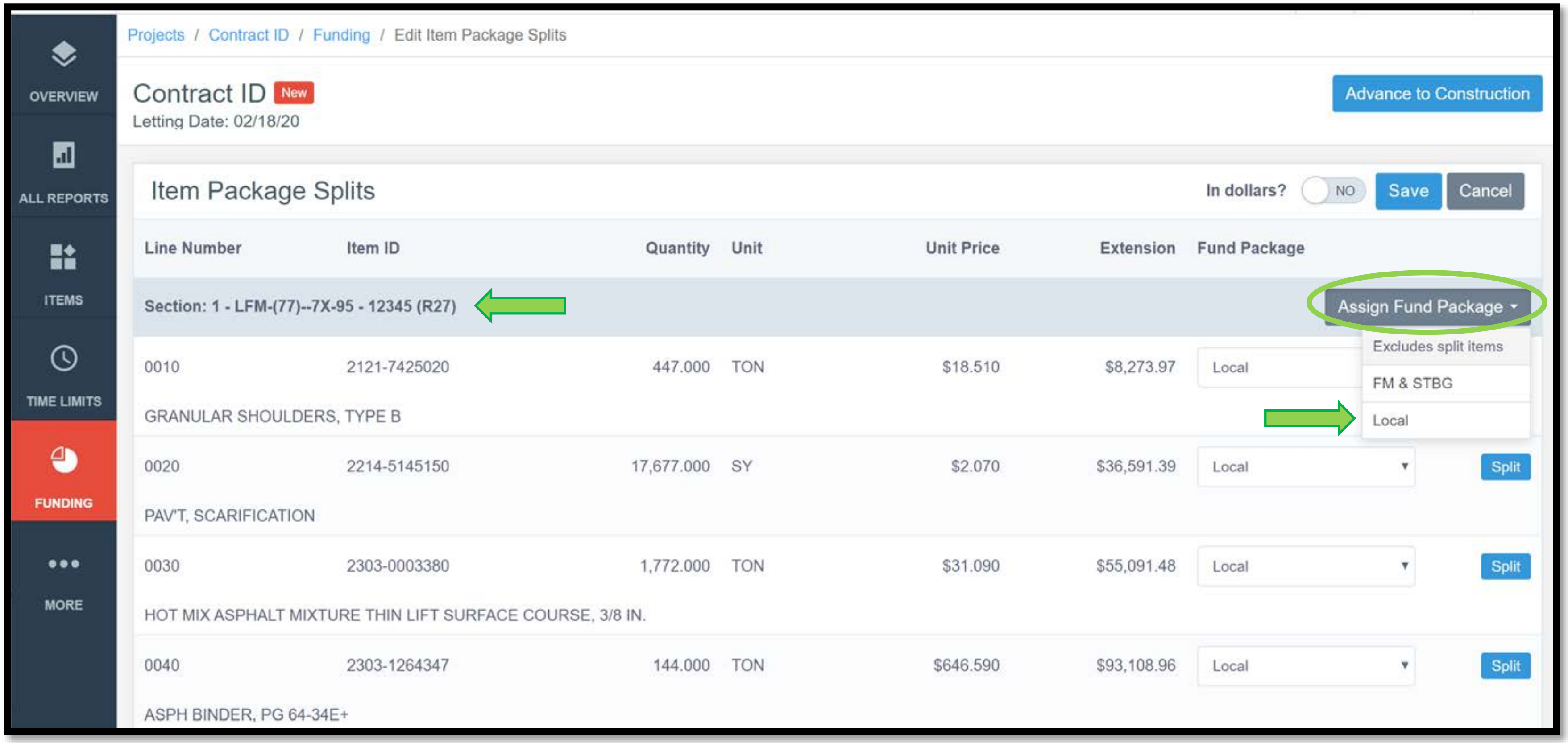
Note: If the .json file provided by Local Systems is imported to set up the project, all of the funding package and funding source for the original contract will be set up automatically. Refer to Section 4 - Creating Funding Packages and Sources for guidance on adding/changing funding packages and sources.

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.

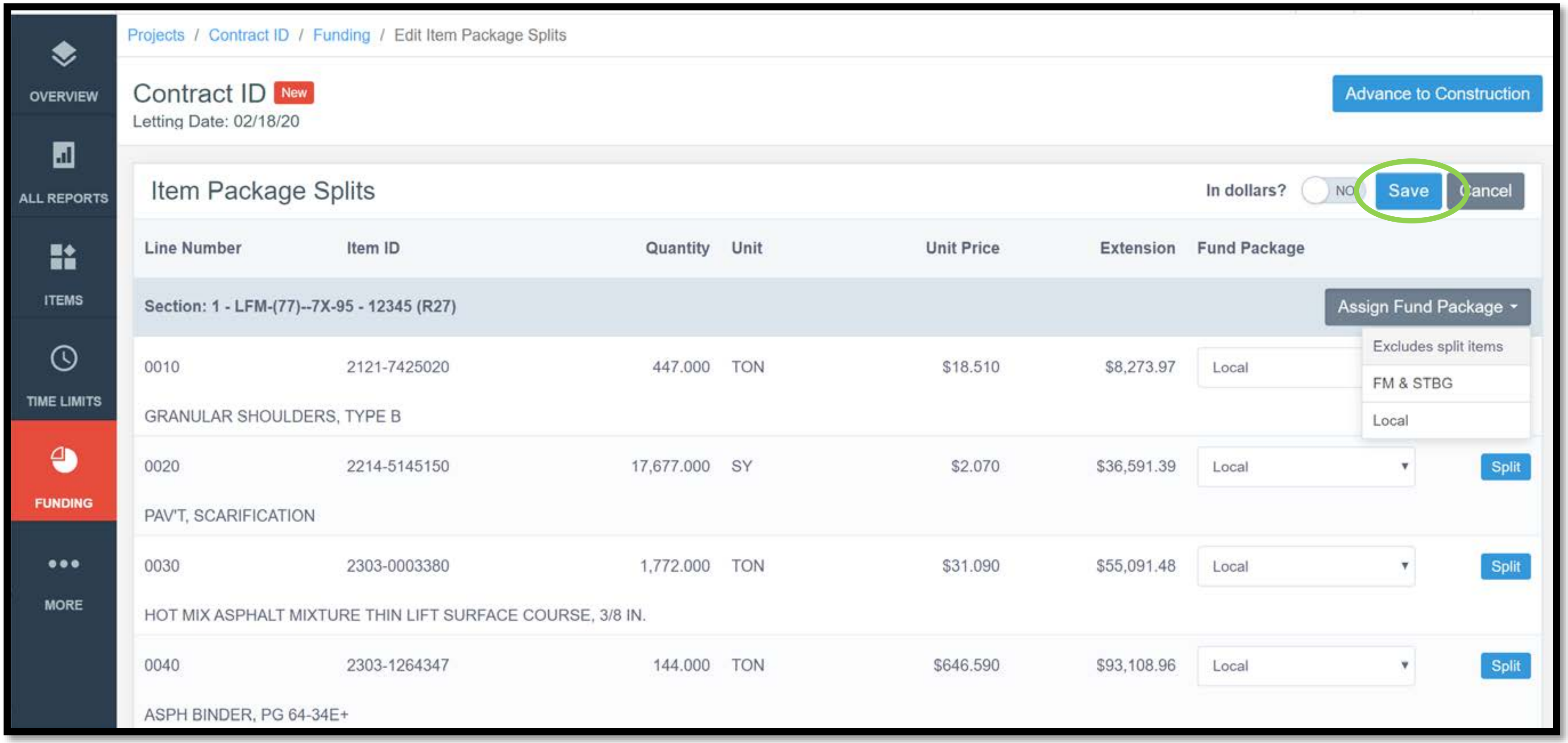
To assign the created funding package to items, go to the “Funding” tab, then click “Edit” in the Items section.



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



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



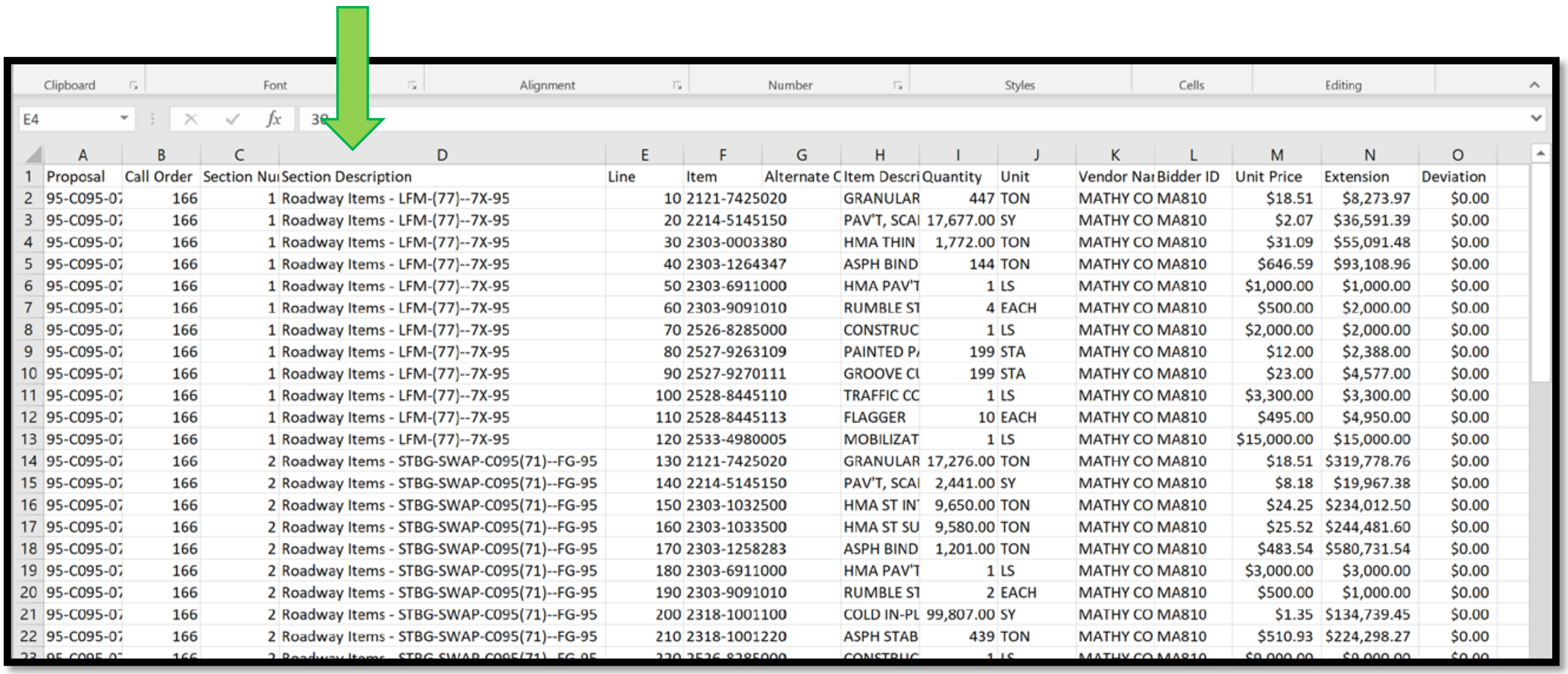
8 - Contracts with Multiple Projects/Divisions

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.

<u>Method 1: Amending the .csv File</u>

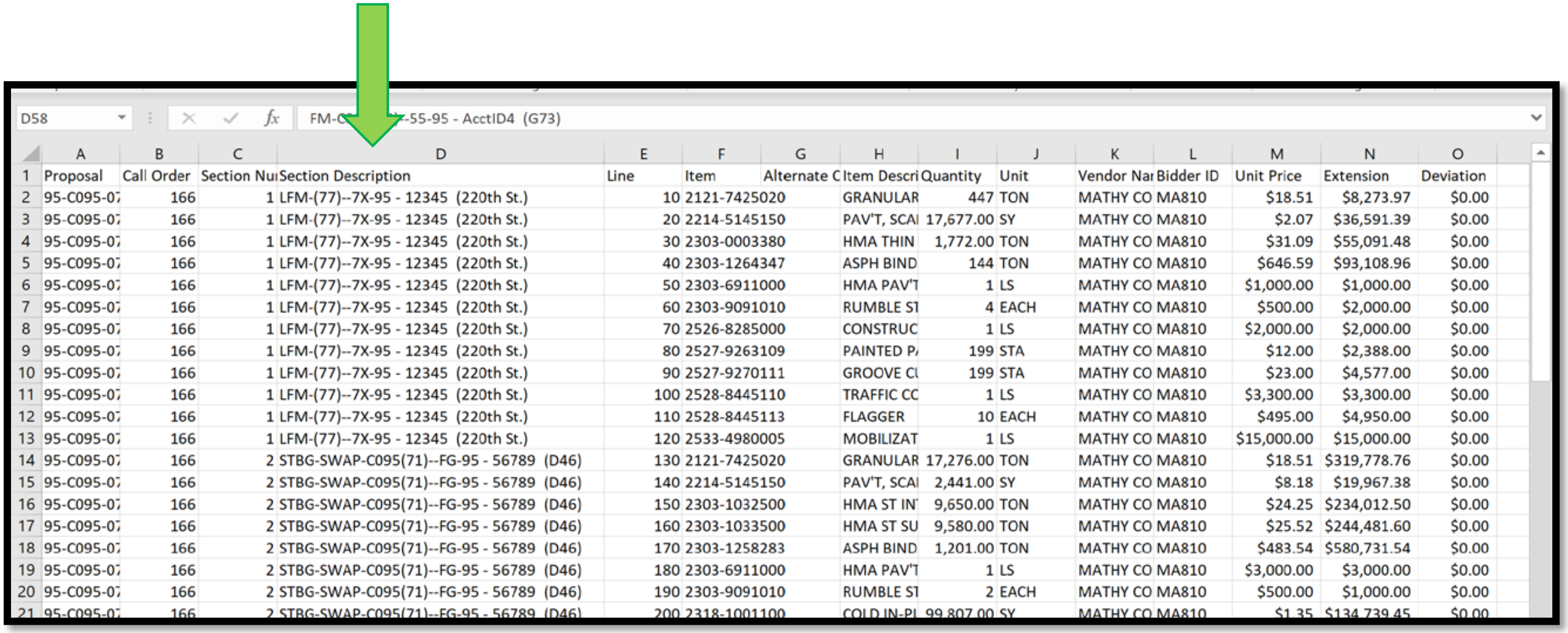
If using the .csv bid tab file for import, you will need to change the name in the “Section Description” column. This is how the original file will look.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Proposal	Call Order	Section Nu	Section Description	Line	Item	Alternate C	Item Descri	Quantity	Unit	Vendor Nai	Bidder ID	Unit Price	Extension	Deviation
2	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
3	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
4	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
5	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
6	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
7	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
8	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
9	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
10	95-C095-07	166	1	Roadway Items - LFM-(77)--7X-95	90	2527-9270111		GROOVE CU	199	STA	MATHY CO	MA810	$23.00	$4,577.00	$0.00
11	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
12	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
13	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
14	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
15	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
16	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
17	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
18	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
19	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
20	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
21	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
22	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

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.

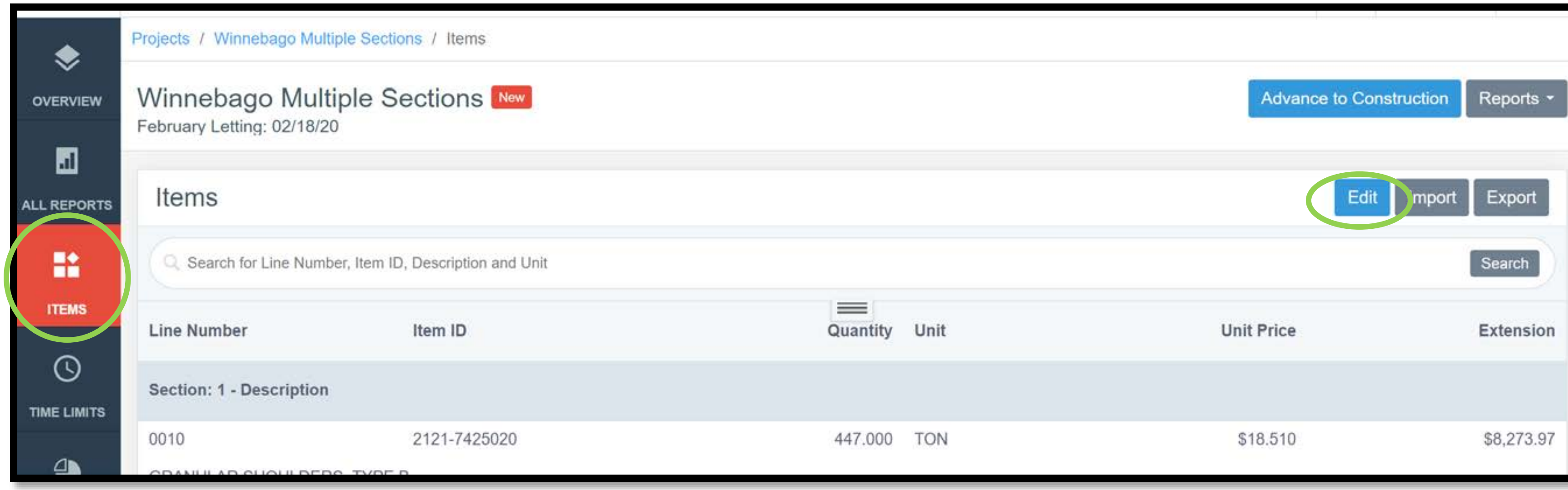


	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Proposal	Call Order	Section Nu	Section Description	Line	Item	Alternate C	Item Descri	Quantity	Unit	Vendor Nar	Bidder ID	Unit Price	Extension	Deviation
2	95-C095-07	166	1	LFM-(77)--7X-95 - 12345 (220th St.)	10	2121-7425020		GRANULAR	447	TON	MATHY CO	MA810	$18.51	$8,273.97	$0.00
3	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
4	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
5	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
6	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
7	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
8	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
9	95-C095-07	166	1	LFM-(77)--7X-95 - 12345 (220th St.)	80	2527-9263109		PAINTED PA	199	STA	MATHY CO	MA810	$12.00	$2,388.00	$0.00
10	95-C095-07	166	1	LFM-(77)--7X-95 - 12345 (220th St.)	90	2527-9270111		GROOVE CU	199	STA	MATHY CO	MA810	$23.00	$4,577.00	$0.00
11	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
12	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
13	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
14	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
15	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
16	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
17	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
18	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
19	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
20	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
21	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

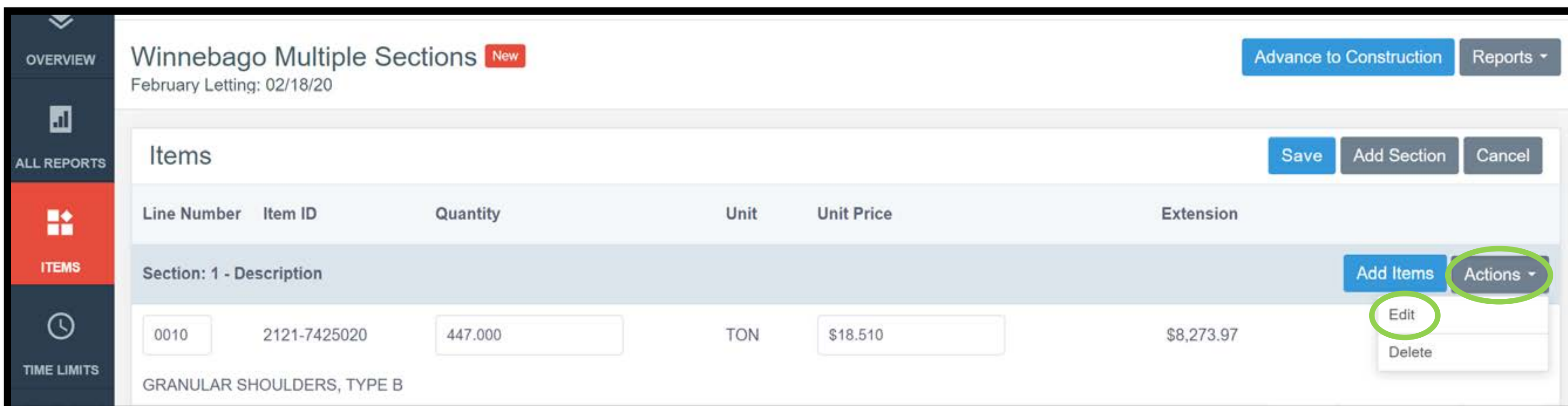
Save the file to the desired location on your computer for importing during project creation and continue as shown in the [Setting Up a Project Using Method 1: "Create Project" via .csv Import](#) section of this instruction manual.

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.



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



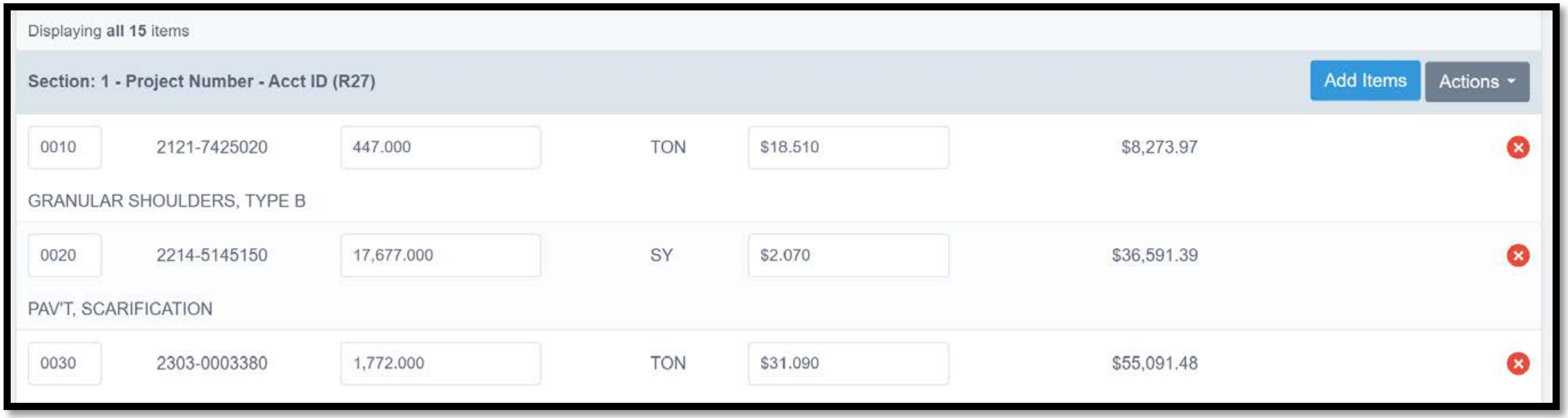
A box will come up with fields for the Section and Description.

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.)

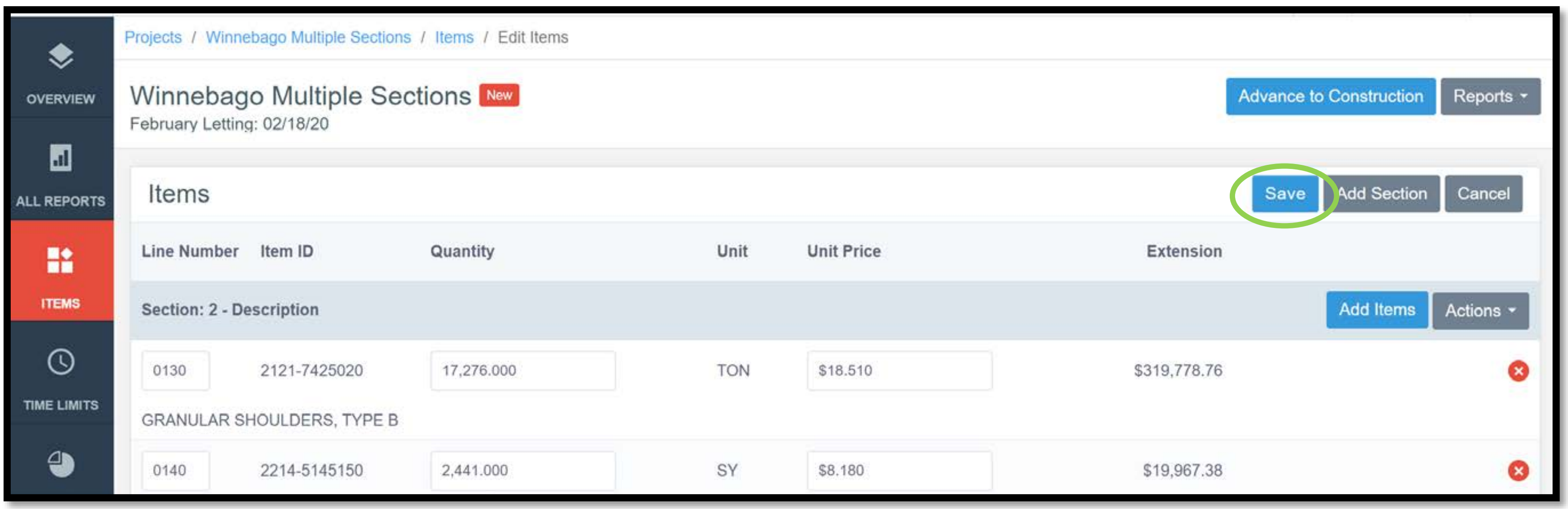
In the "Description" field, enter the "Project Number - Accounting ID". The project number entered here should be the individual project number within the tied contract that pertains to the line items listed in this section. You can add additional information in ( ) after the Acct ID to identify the 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.

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.

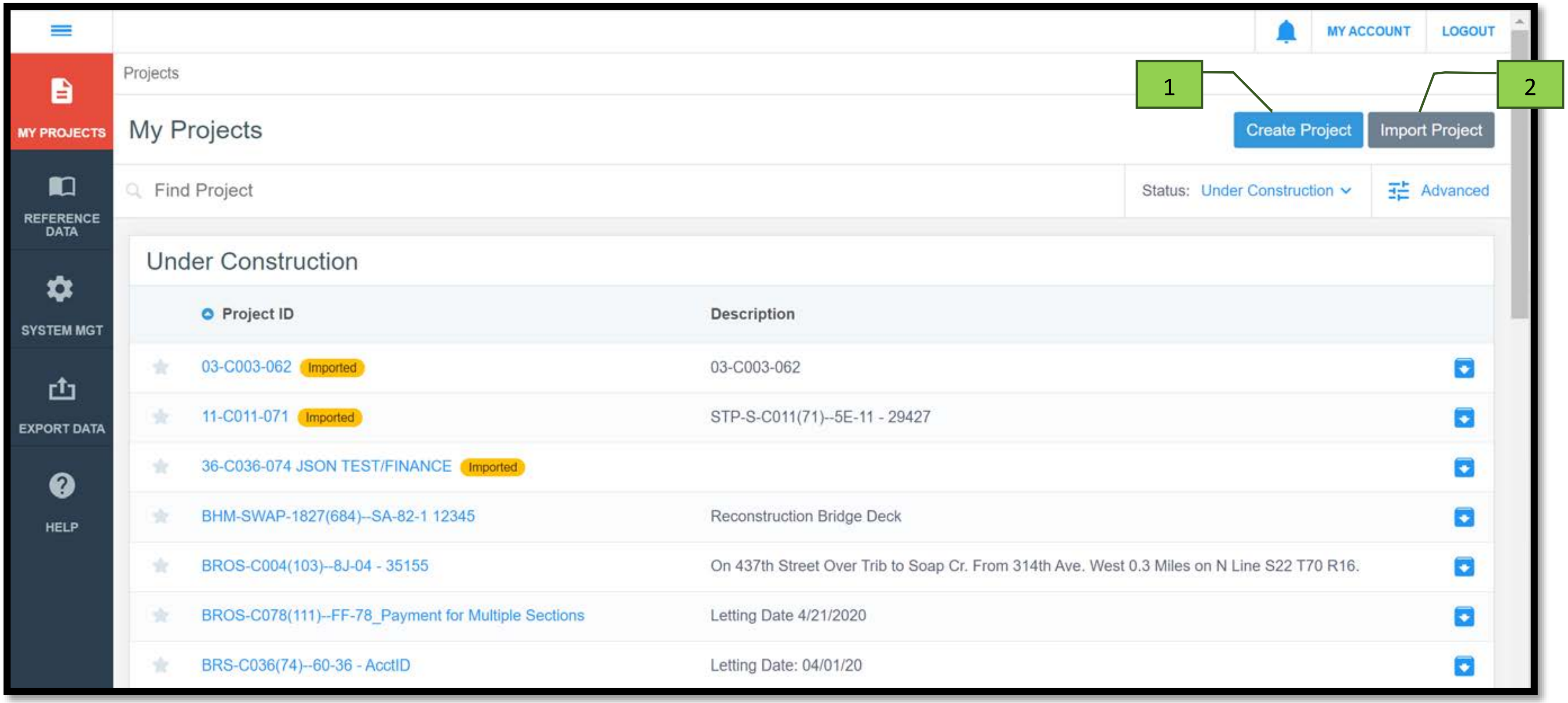


Scroll back up to the top and click "Save" to save the changes to the section names.



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

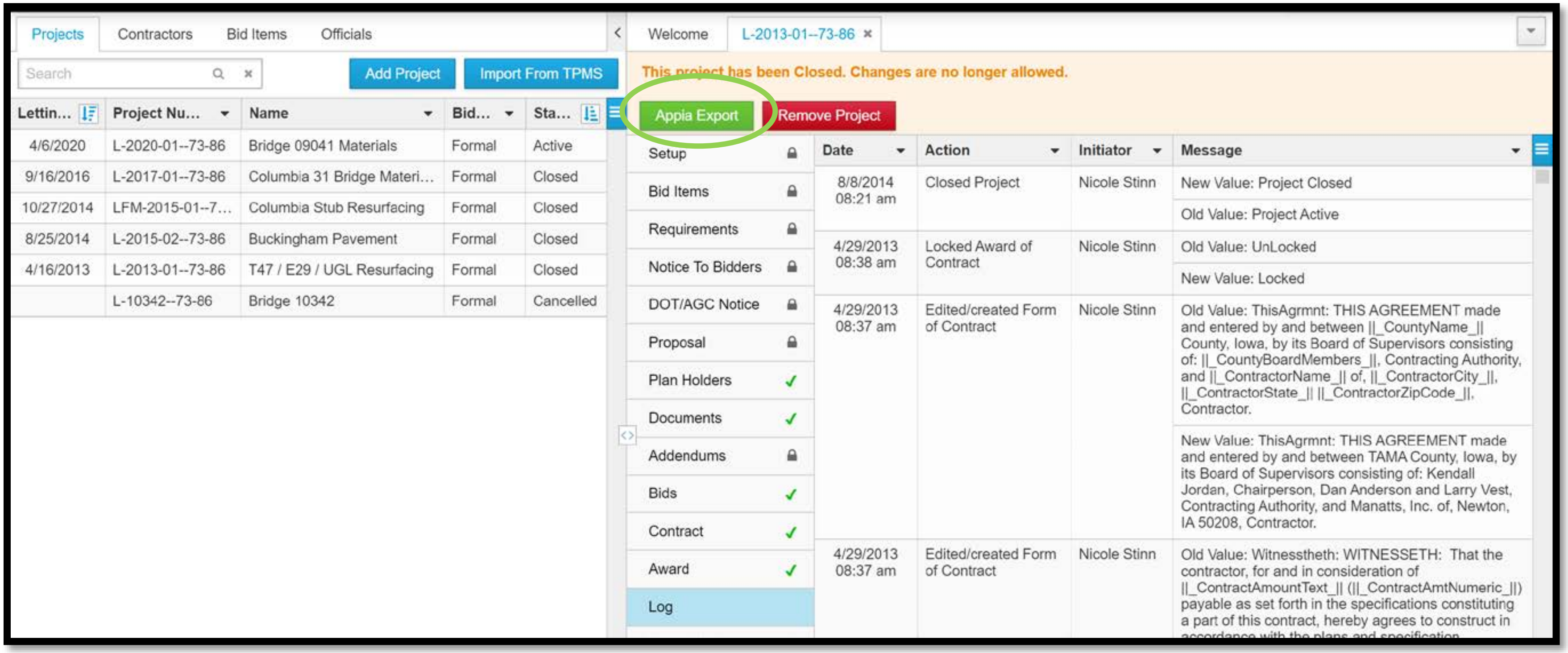


Method #2 – Importing a project

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. 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.)

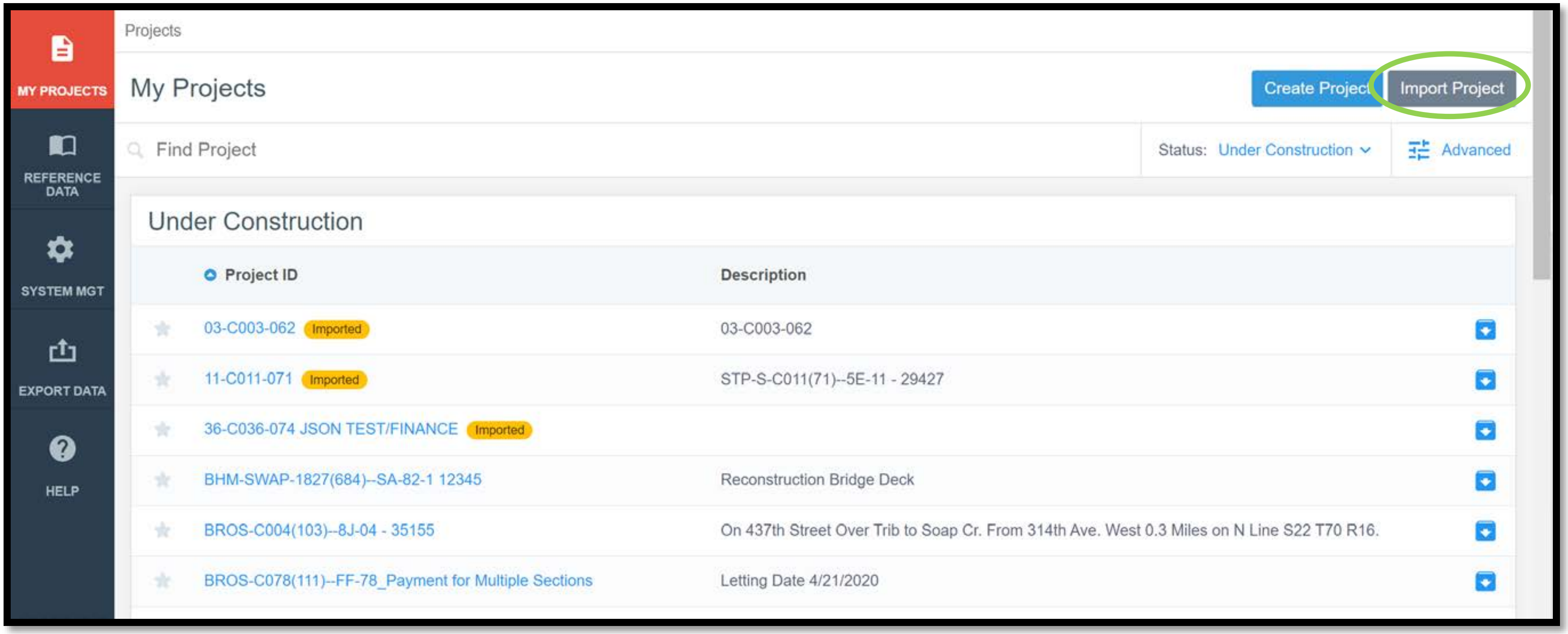
The .json file for projects let using the ICEA Service Bureau’s “Local Letting Toolkit” can be exported from that program and can be used immediately. The .json file can be generated by clicking on the “Appia Export” button as shown below.



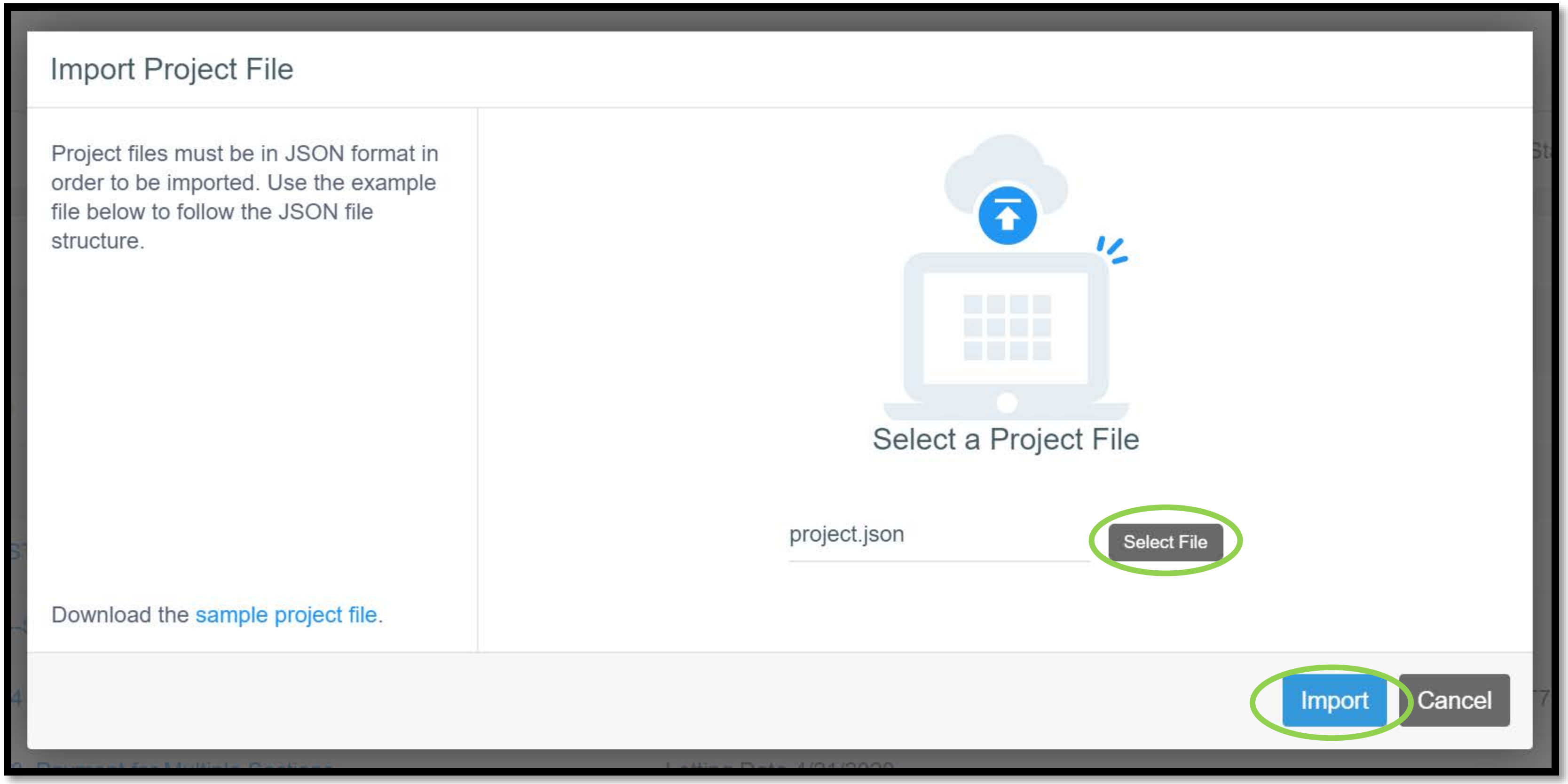
Before importing your setup file, please be sure you have completed the following tasks.

- **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.

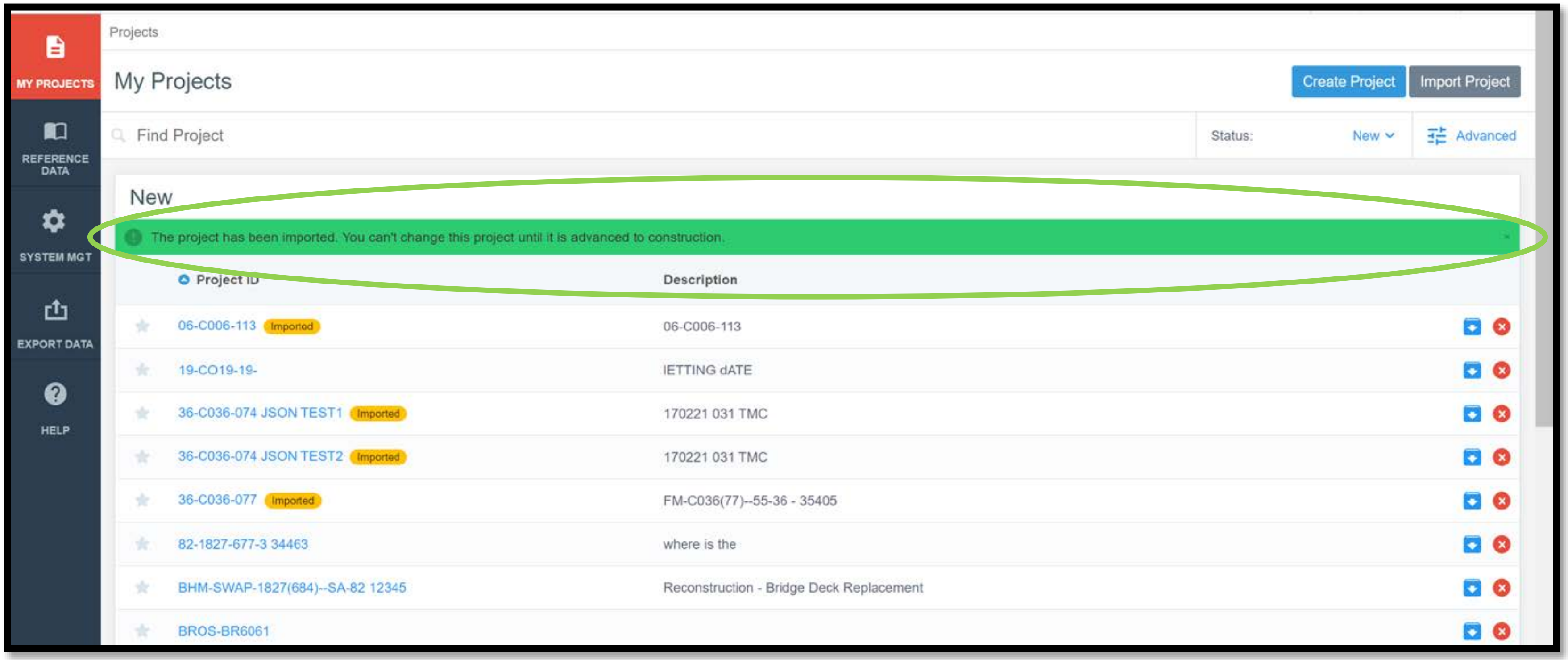


This window will appear. Click on the "Select file" button and browse to select the .json file you have saved on your computer.

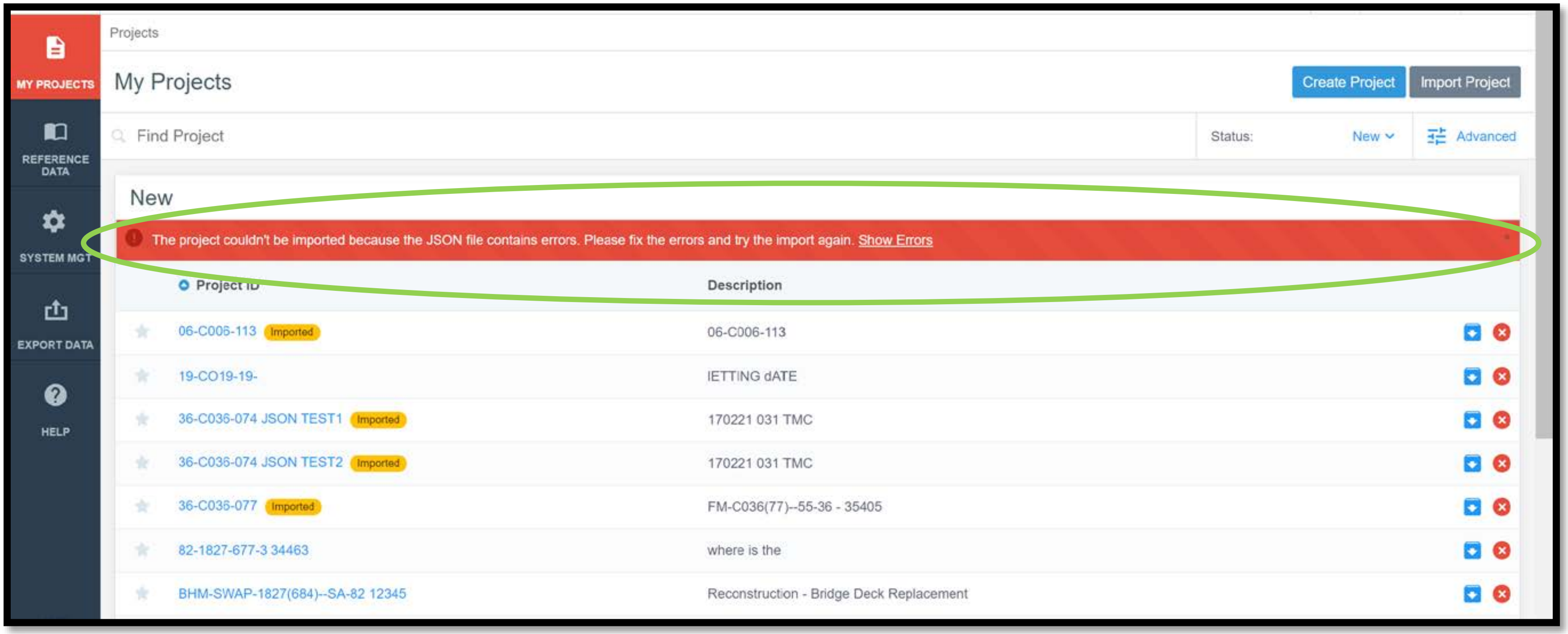


Click on the “Import” button once you have chosen the appropriate file.

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.



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.

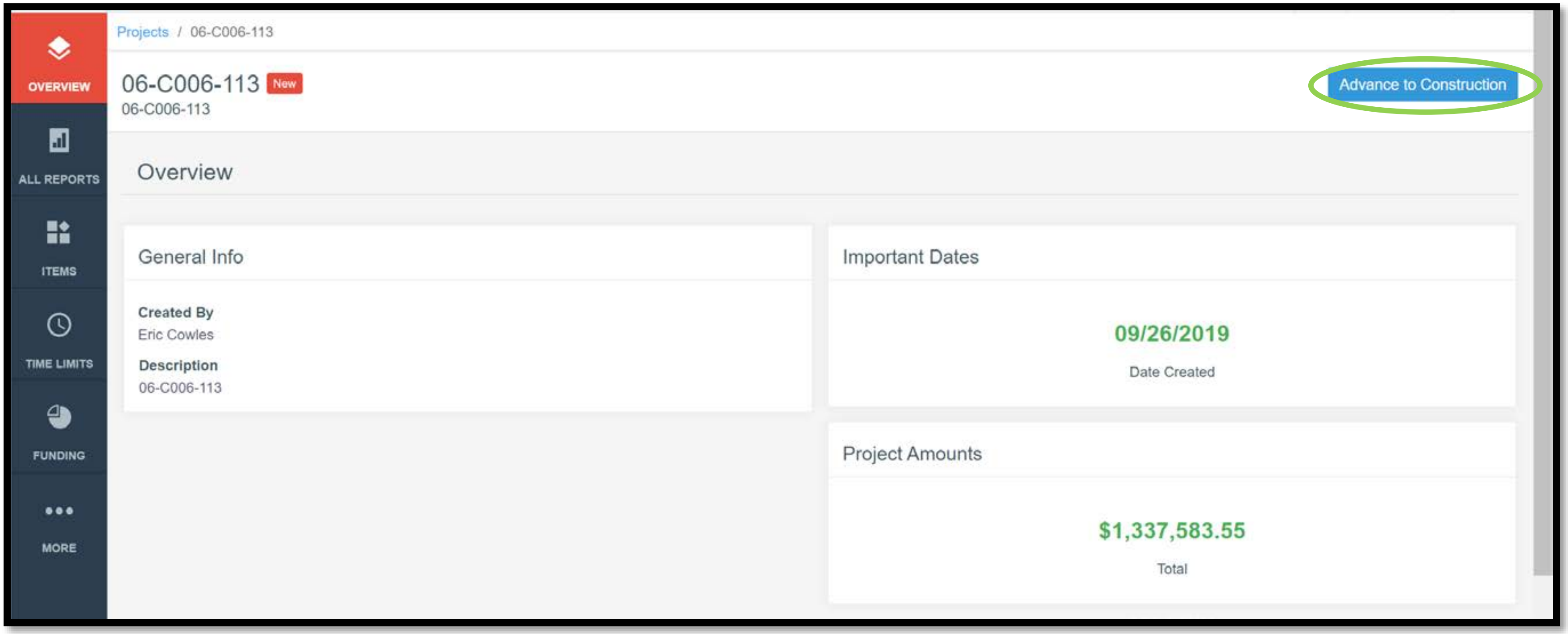


A lighter red ribbon will show below the red error message ribbon listing the errors present.

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 at Douglas.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.

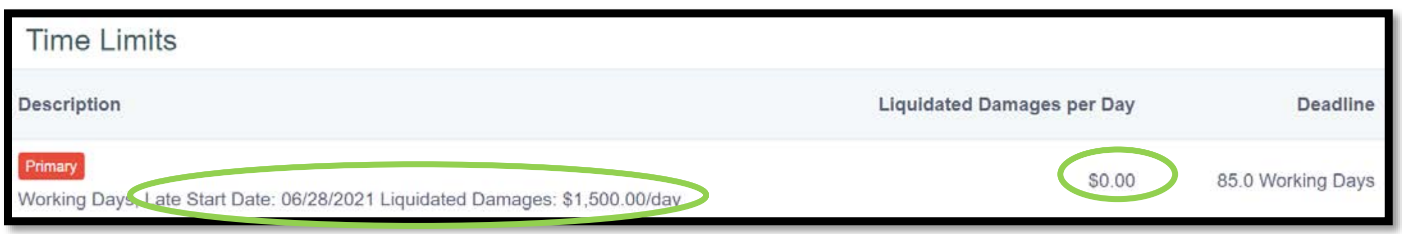
When you are sure all of the data imported is correct, click on the “Advance to Construction” button in the upper, right corner of the screen.

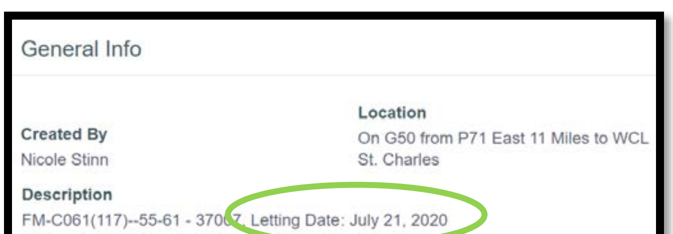


Continue with the Advancing the Project to the “Under Construction” Phase section of this instruction manual.

***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.





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.

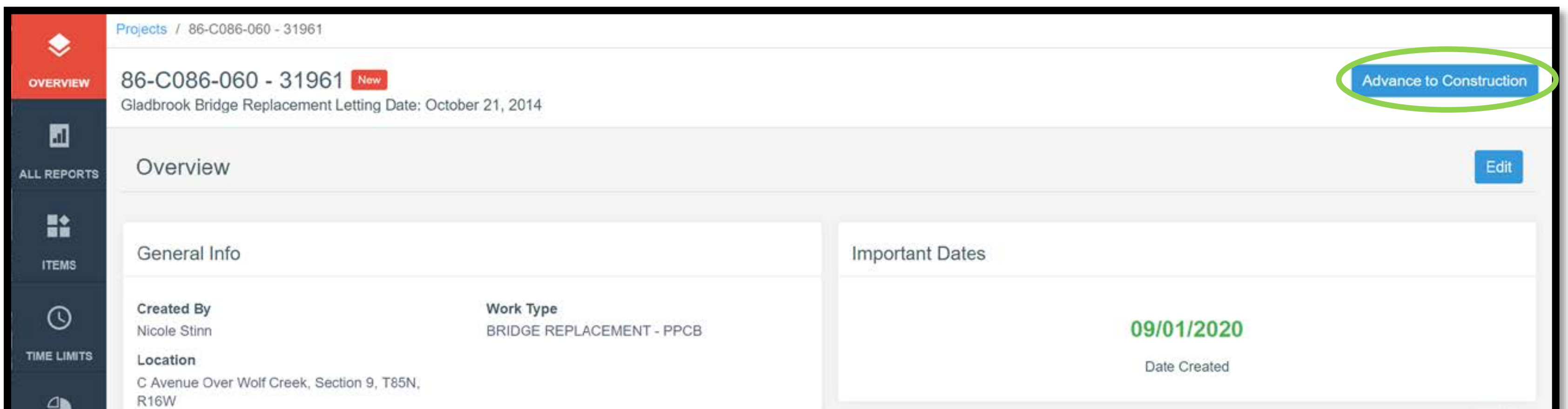
Some examples of non-revisable details/settings include:
- the prime contractor (shown later in this section) and
- the Notice to Proceed date.

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.

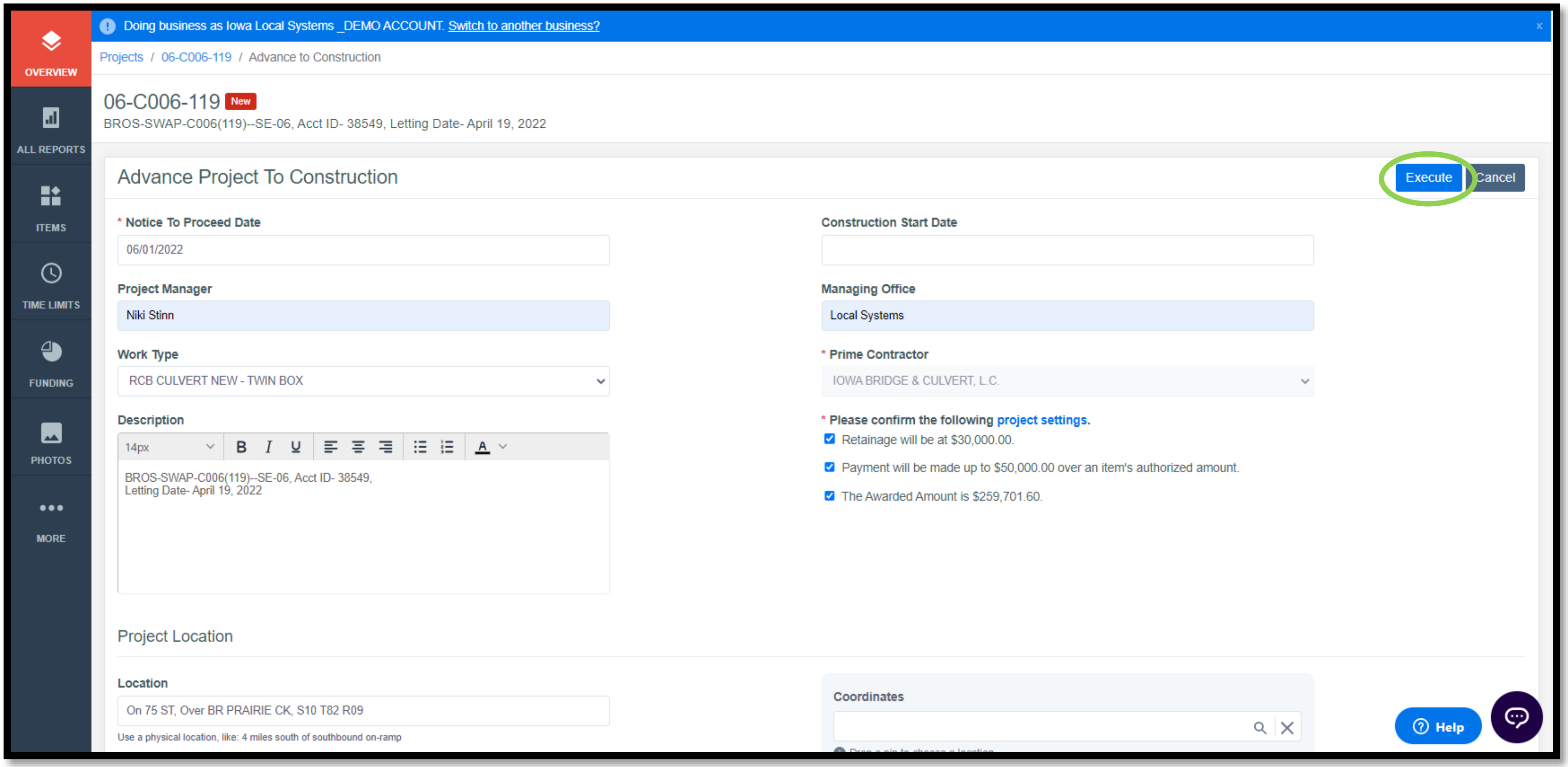
DO NOT hit the "Advance to Construction" button until you are sure the project is set up the way you want it. Important things to double check include time limits, funding sources, names of sections for multiple project/multiple division contracts, and payment settings.



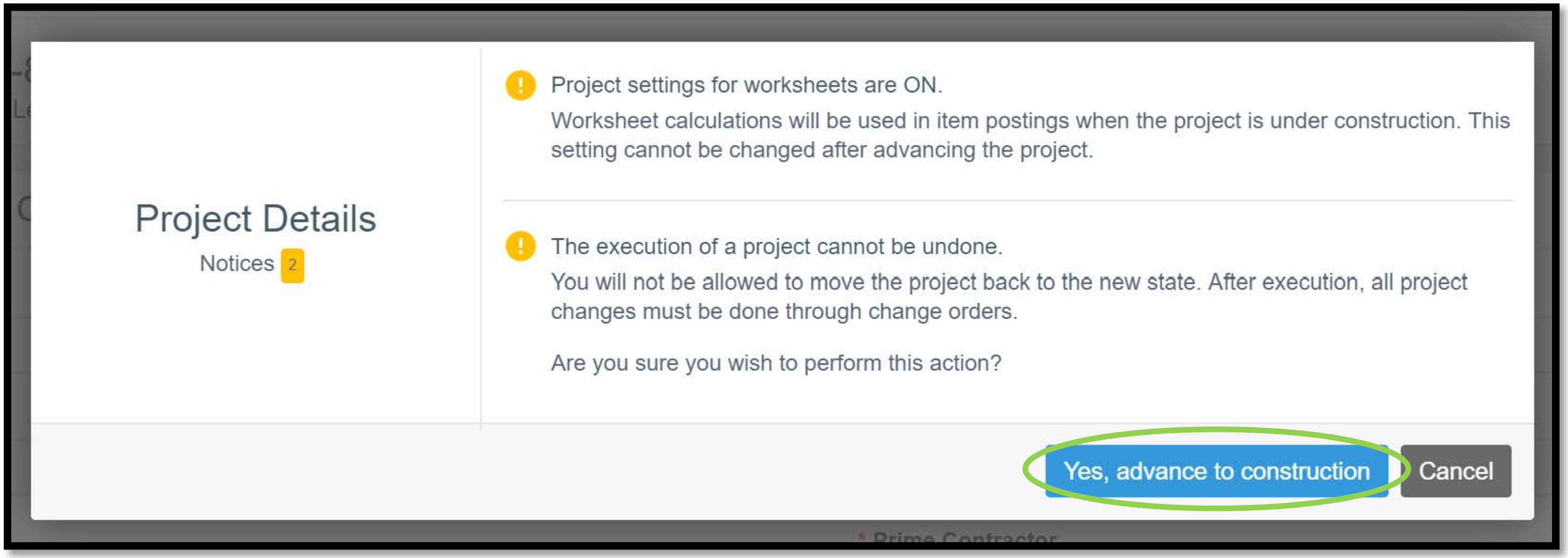
The following screen will appear. Enter the information as follows:

- 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.

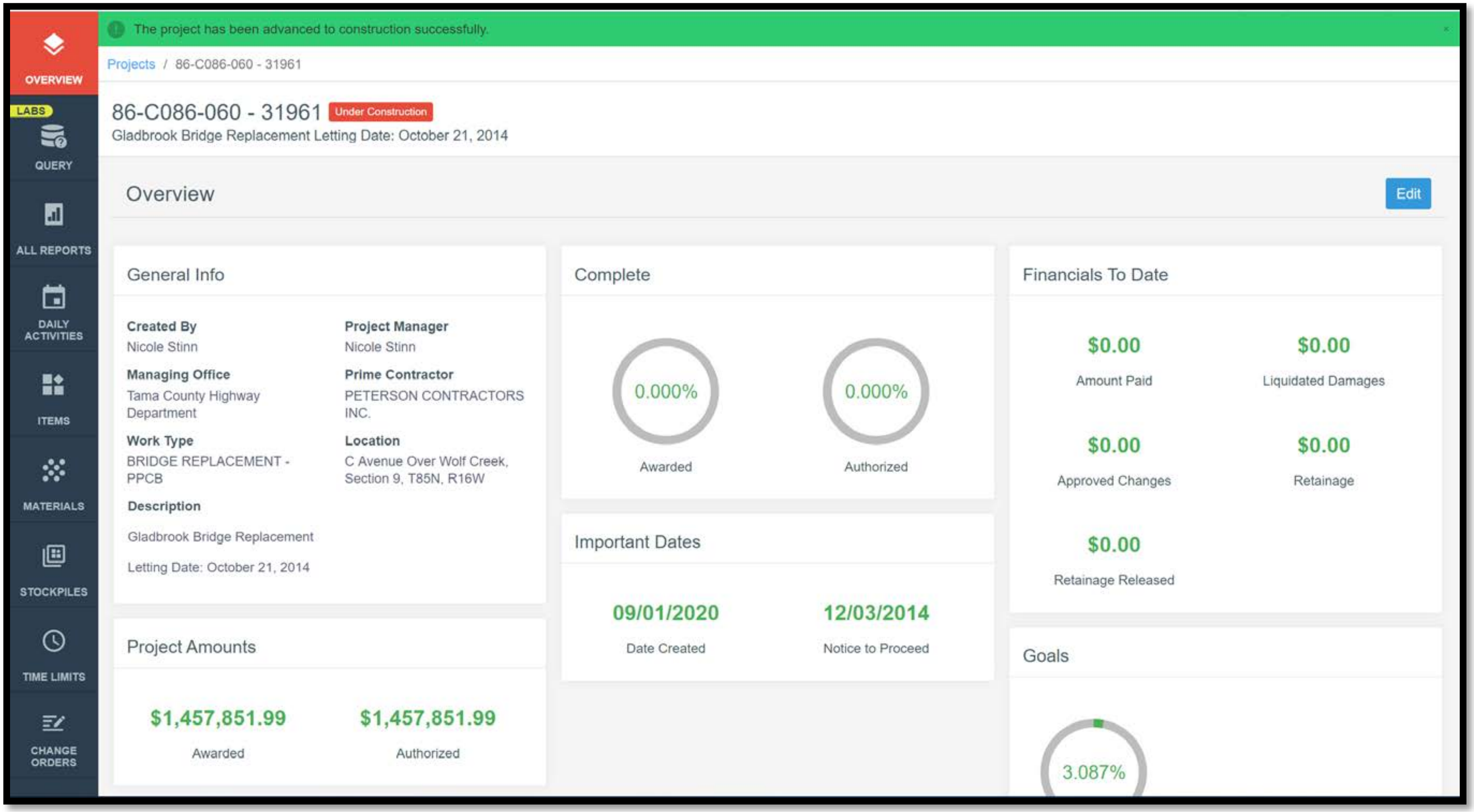
- Project Settings: Check the boxes next to the three settings if they are correct. If not, go back to the project settings and correct them. When all of the necessary information has been entered and **double checked**, click on the "Execute" button in the upper, right corner.



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



The following screen should appear.



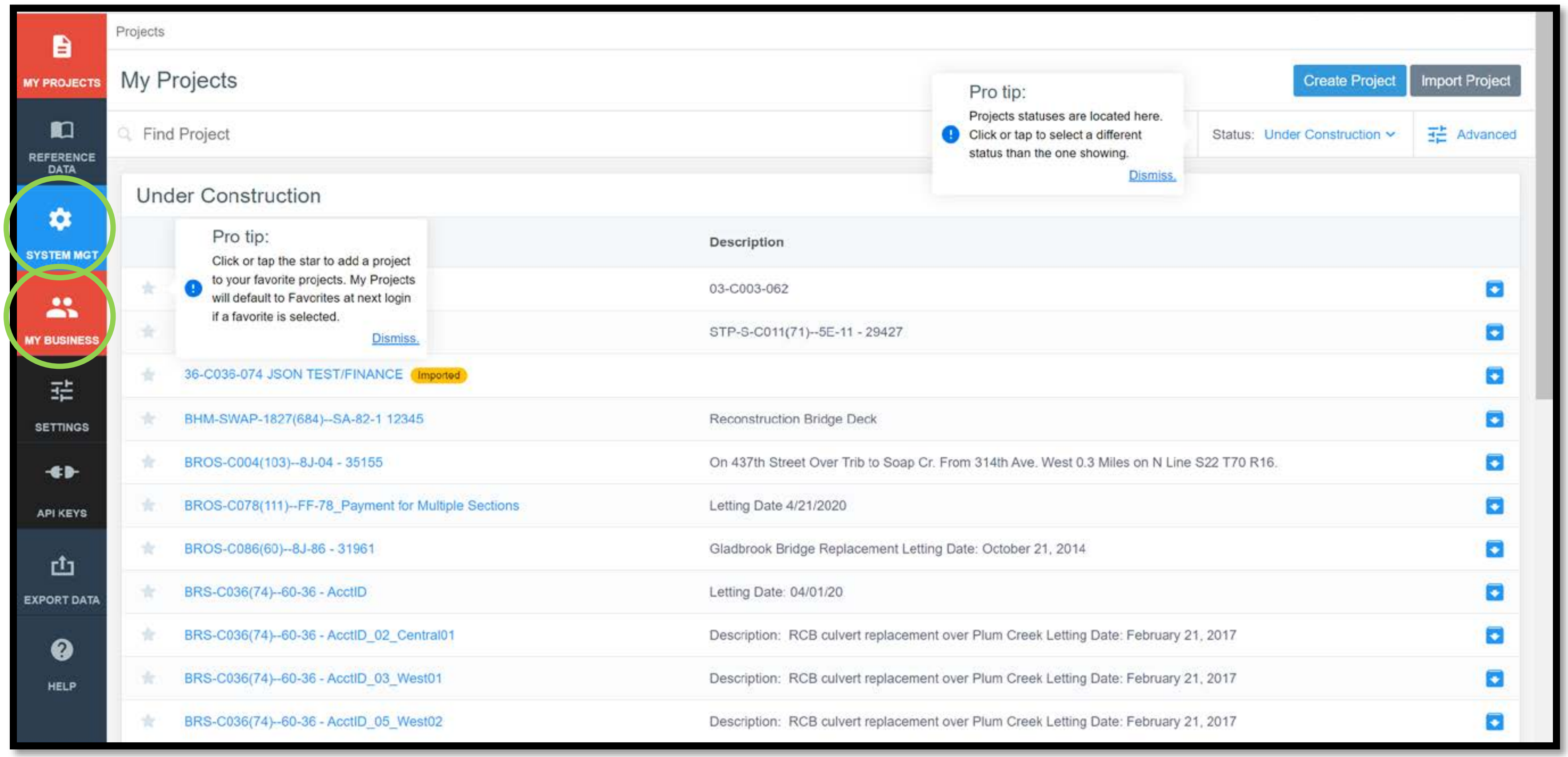
Congratulations! You are now in the "Under Construction" phase and can track construction progress.

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

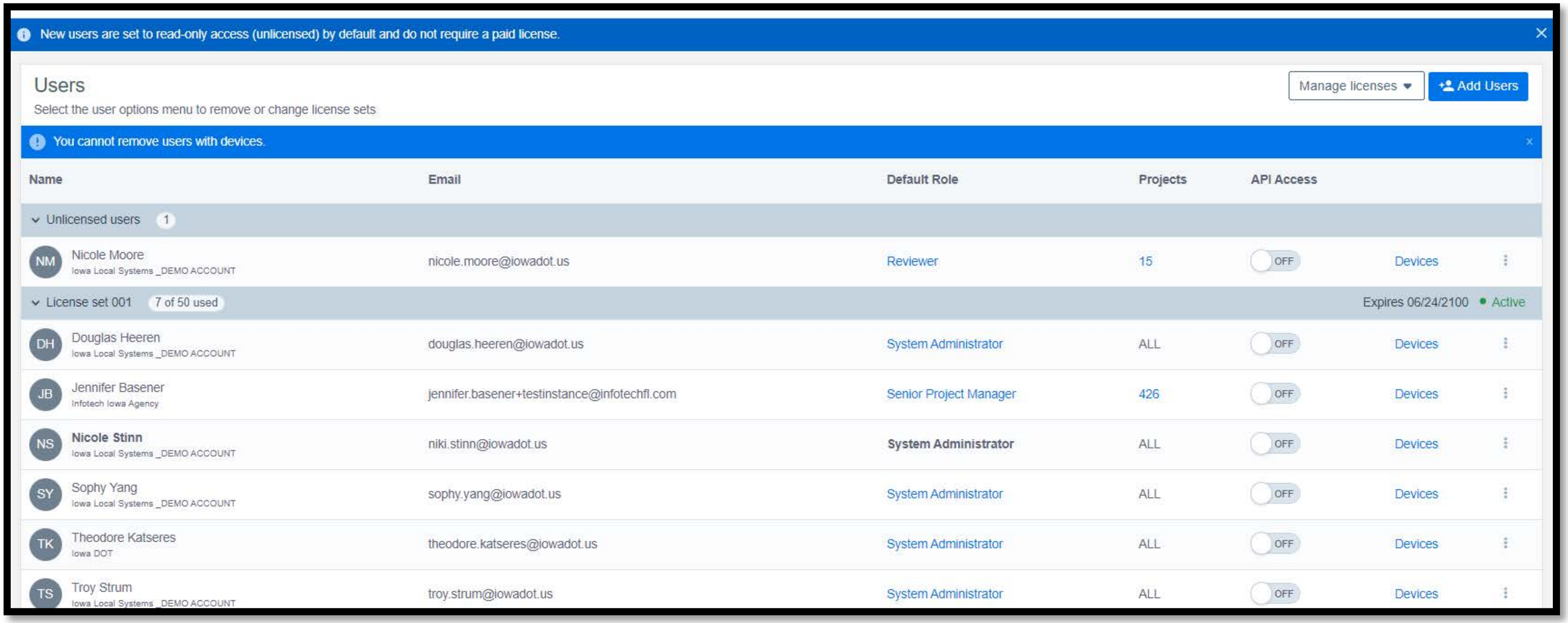
(System Administrator access level required.)

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.



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

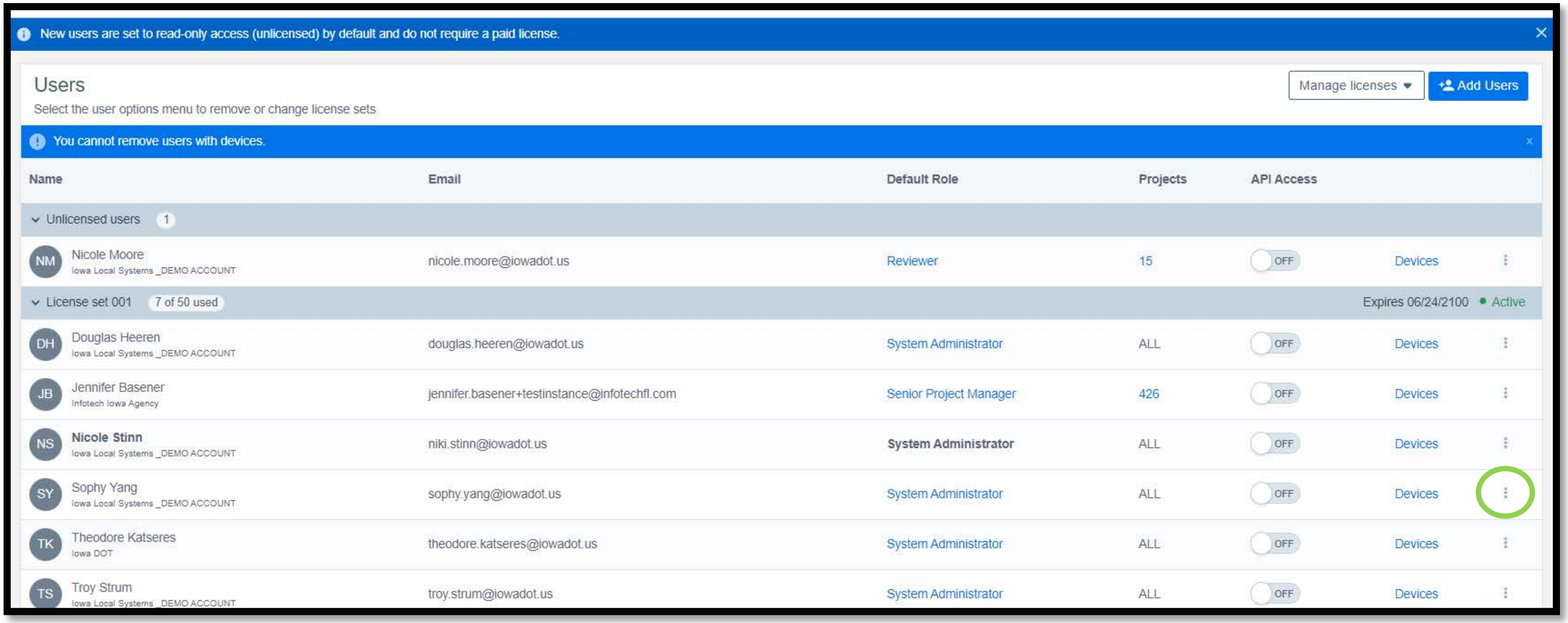


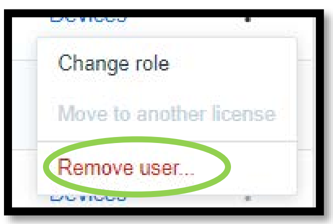
The following Local Systems Bureau and/or Systems Planning Bureau staff needs to be added to your default/global user list. See the Local Systems Contact Us website or the Systems Planning Staff > Grant Programs website for bureau personnel.

- 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.

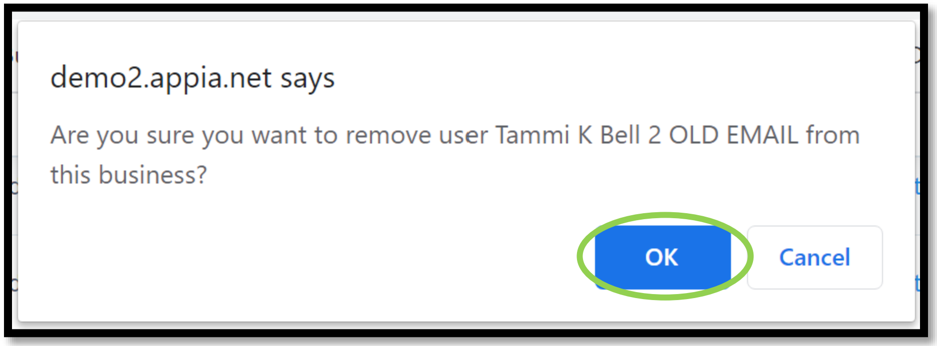
A. Deleting a User

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.



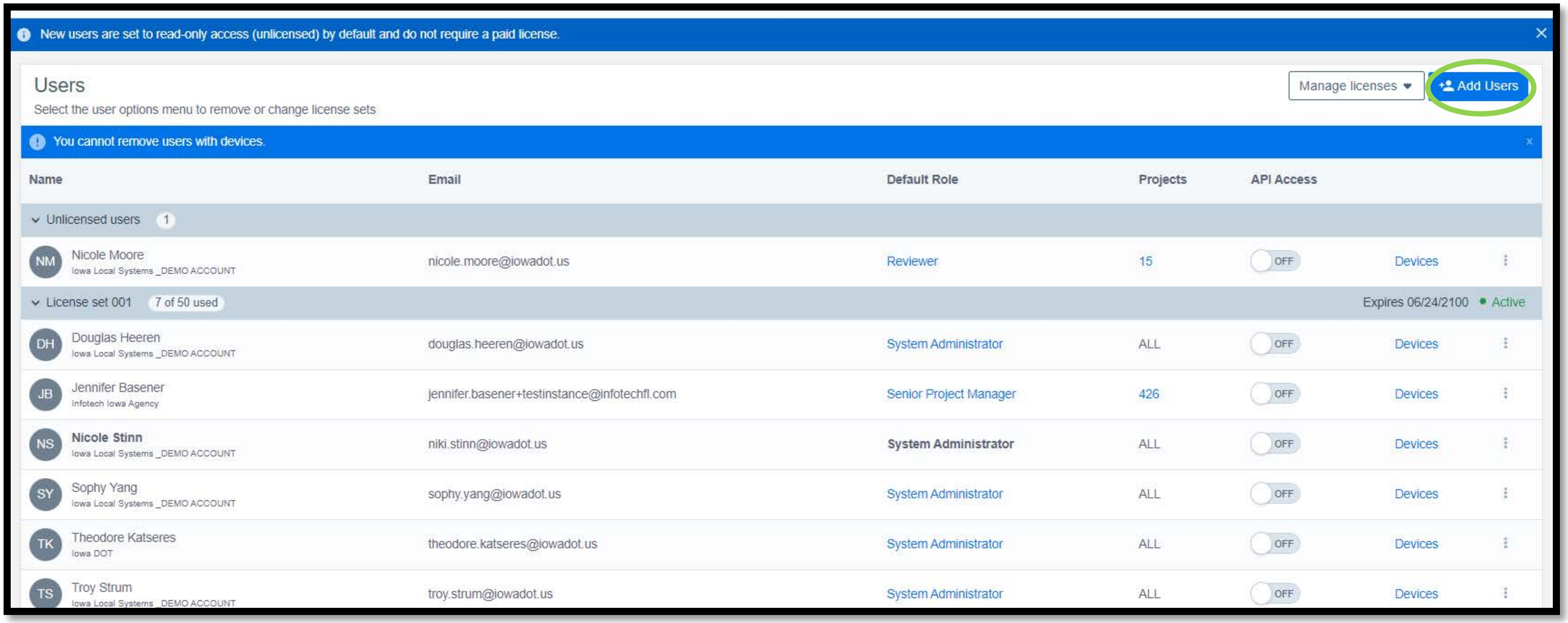


A pop-up window will appear asking if you are sure you want to delete the user. Click “ok”.

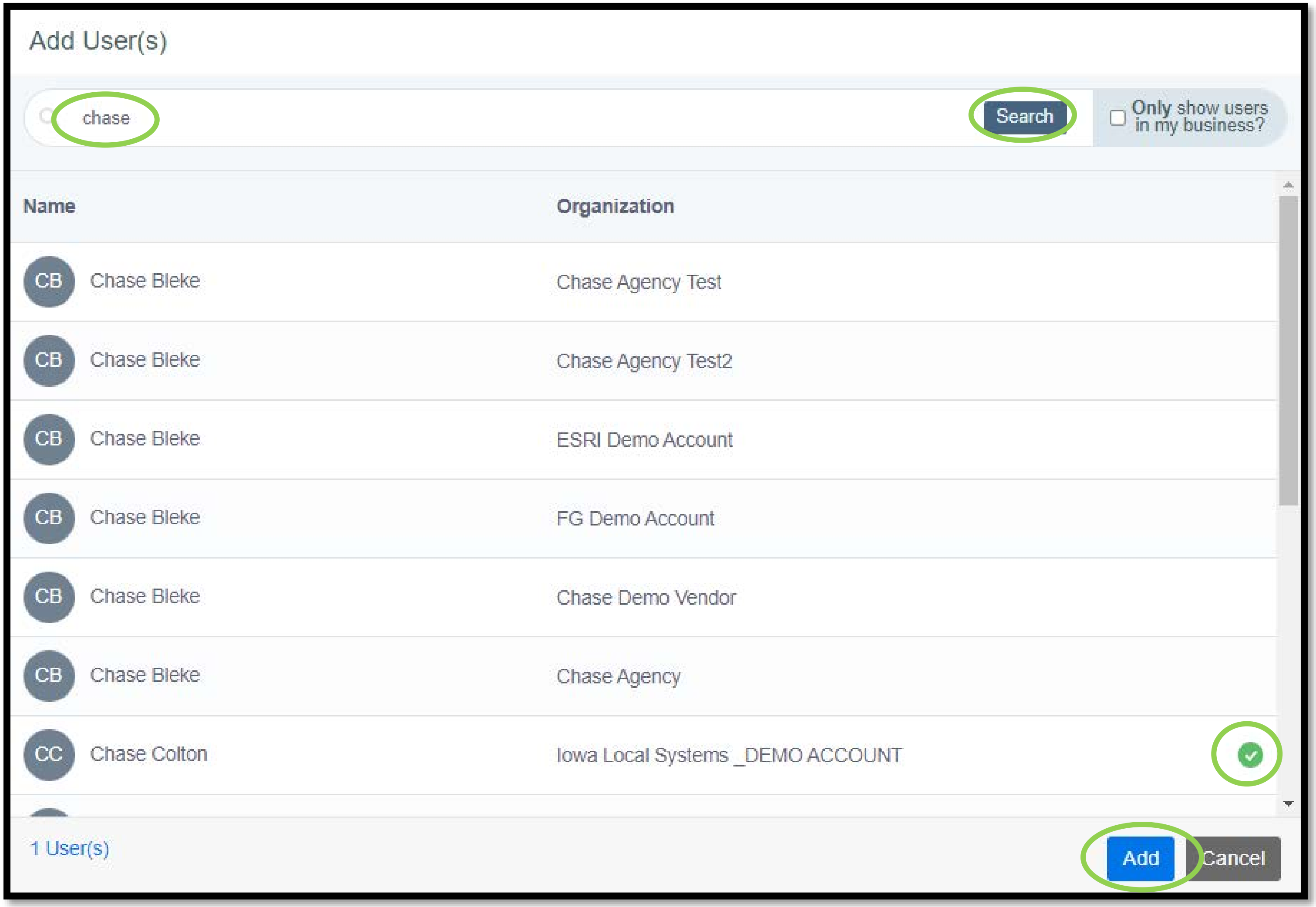


B. Adding a User

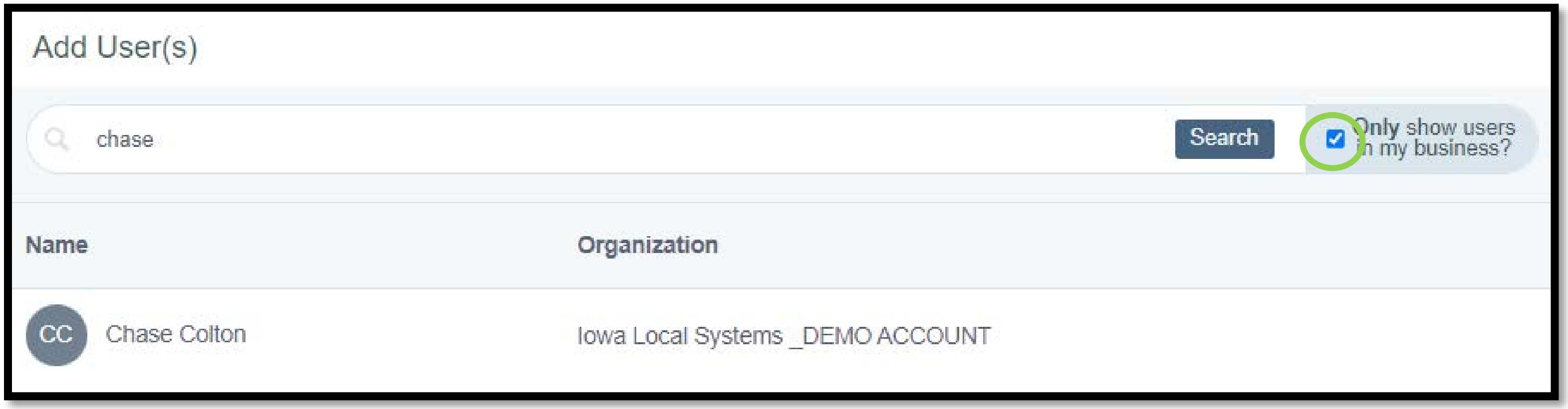
To add a user, click “Add Users” in the upper, right corner.



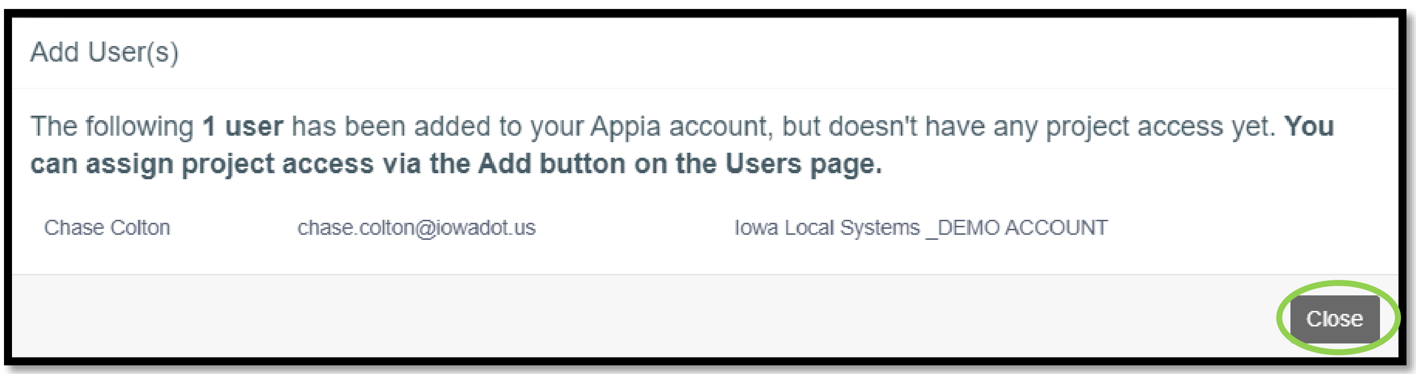
Type the name of the user you are adding into the search box and click “Search”. The names of anyone with an Infotech account matching the searched description will appear. Click on the line containing the desired user’s name. A green circle with a check mark will appear on the right. Click “Add” in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



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".

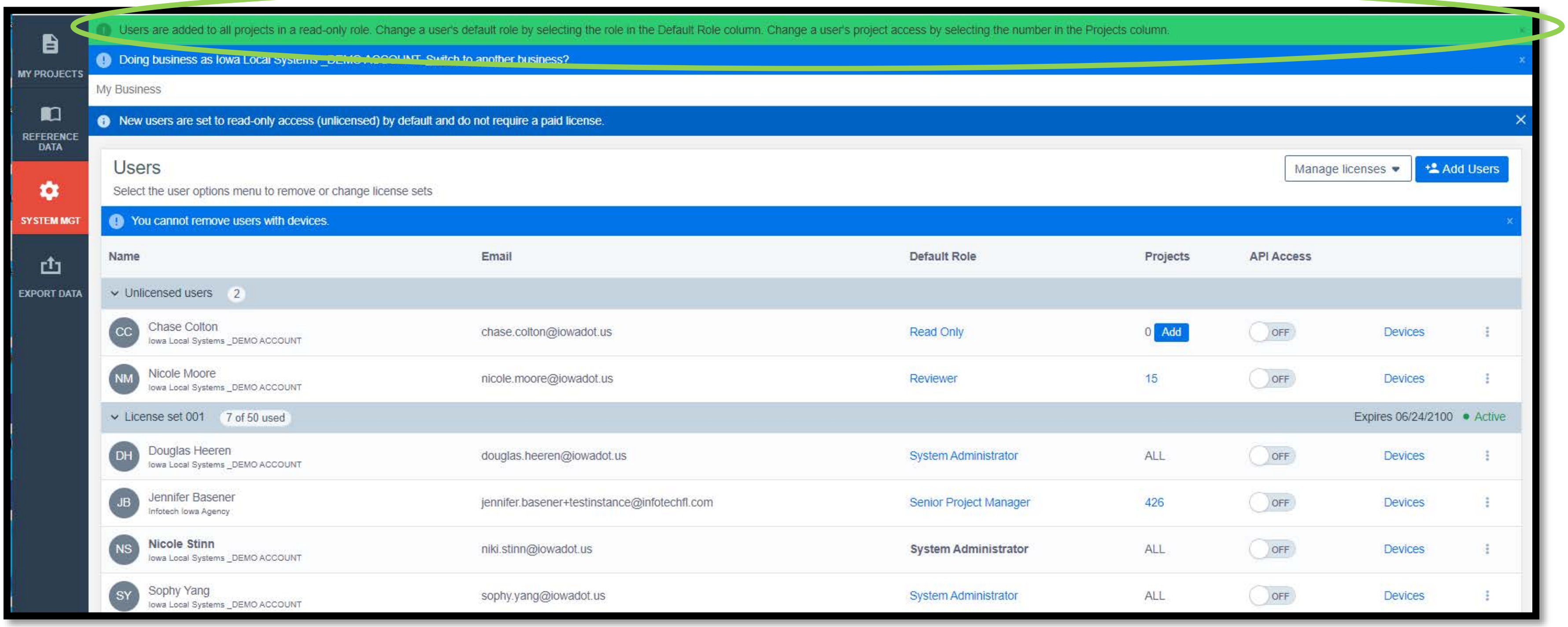


If successful, a window will pop up with a message showing the user has been added, but they do not have access to any projects yet. Click "Close". Then, if that person needs to have access to any existing projects, go to the specific projects and add them as users there as shown in Section [Project 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.



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

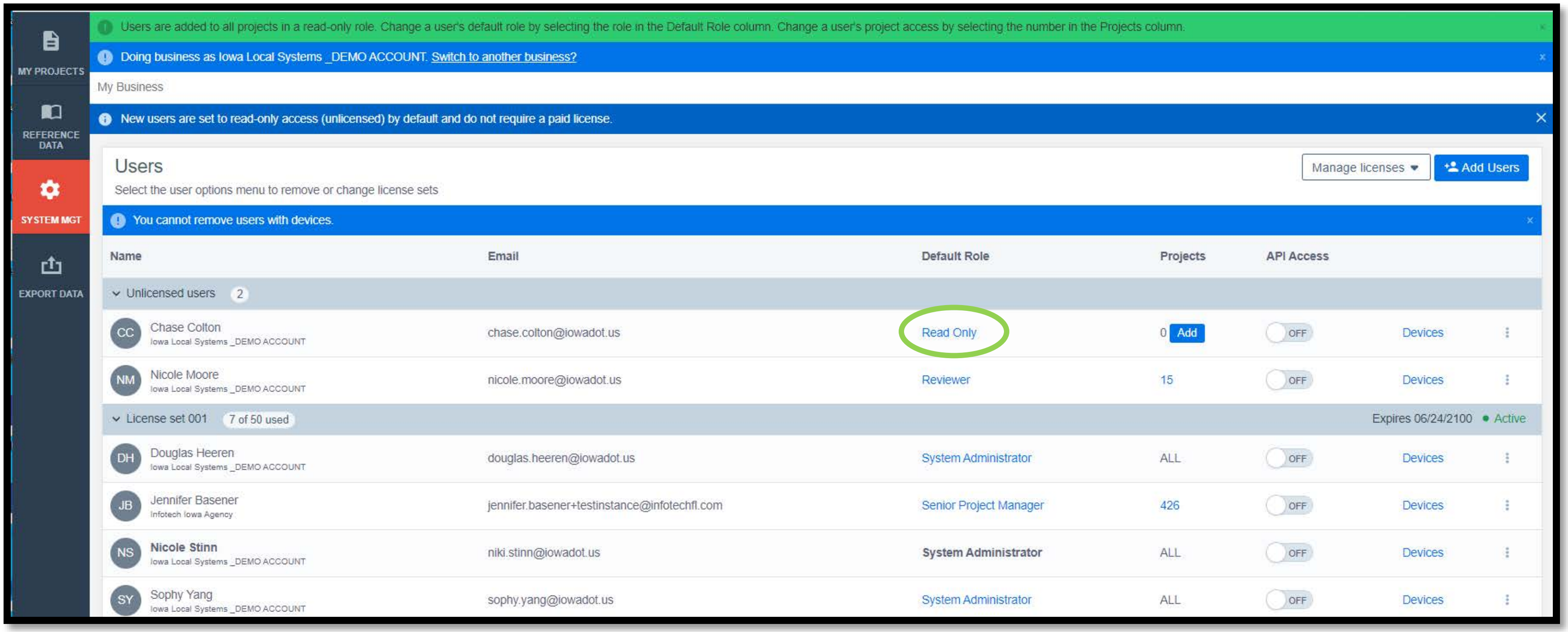
You will be brought back to the screen with the user list which should have a green ribbon across the top indicating the user was added with “read-only” access.



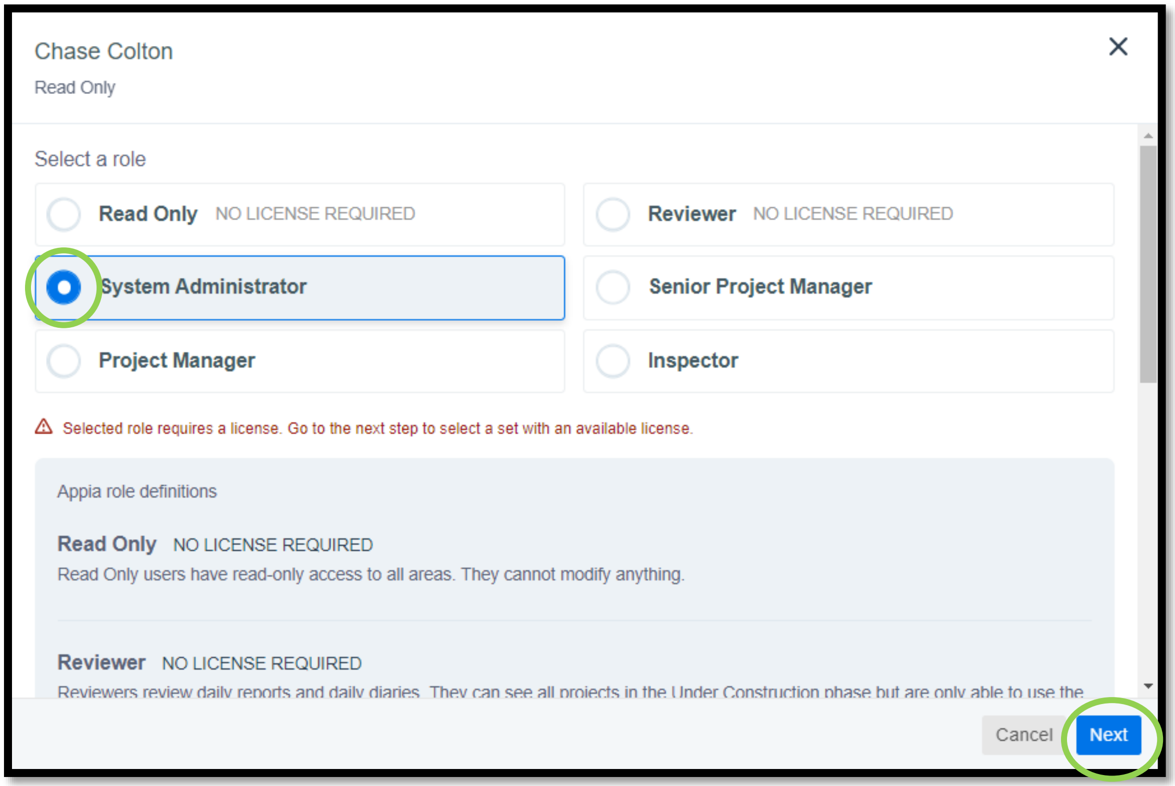
C. Editing User Roles

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.

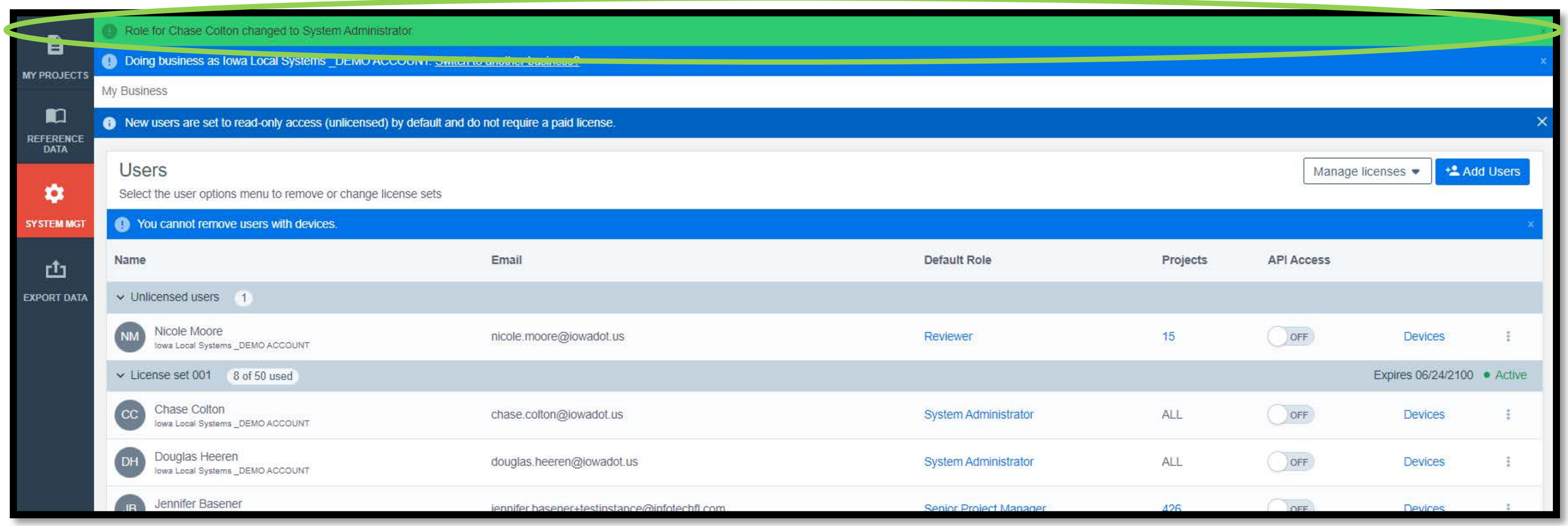


A window will appear with descriptions for all available roles. Click on the radio button to the left of the desired role. If the selected role does not require a license seat, click the blue “Save” button in the lower, right corner. If the selected role does require a license seat, click the blue “Next”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



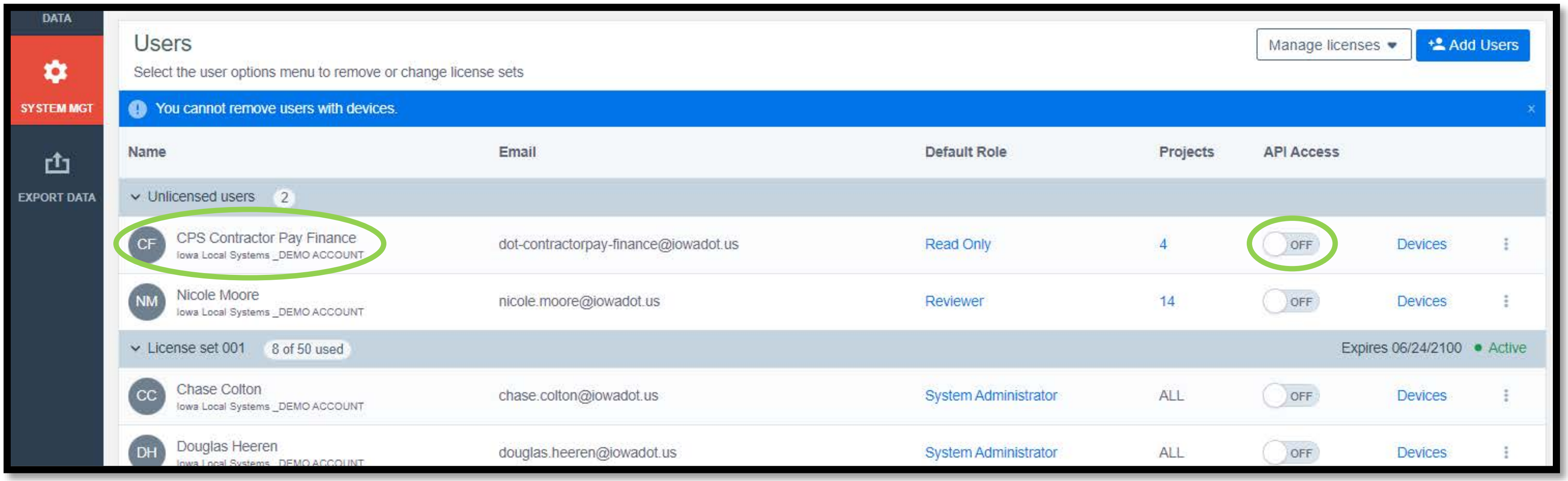
If the role required a license, and you clicked “Next”, a box will pop up asking you to select a license seat. Click the radio button under the desired license set (if your agency has more than one set). Then click the blue “Save” button.

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.

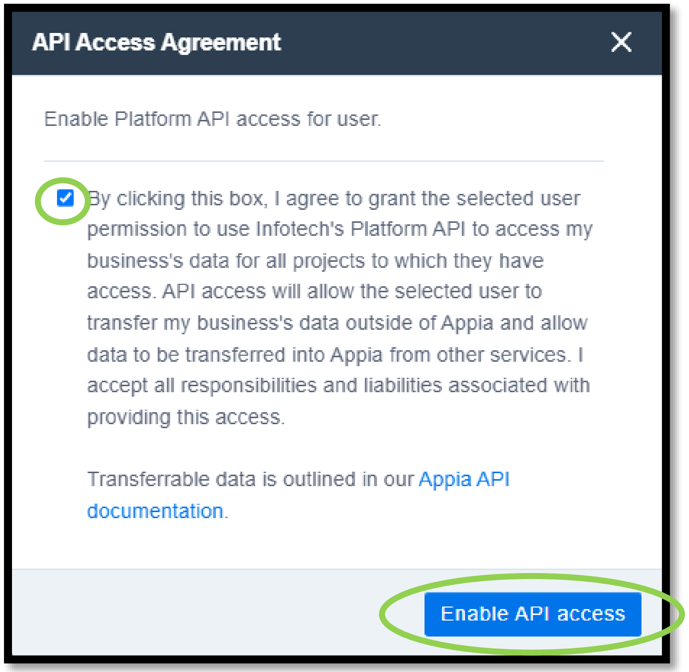


D. Managing API Access

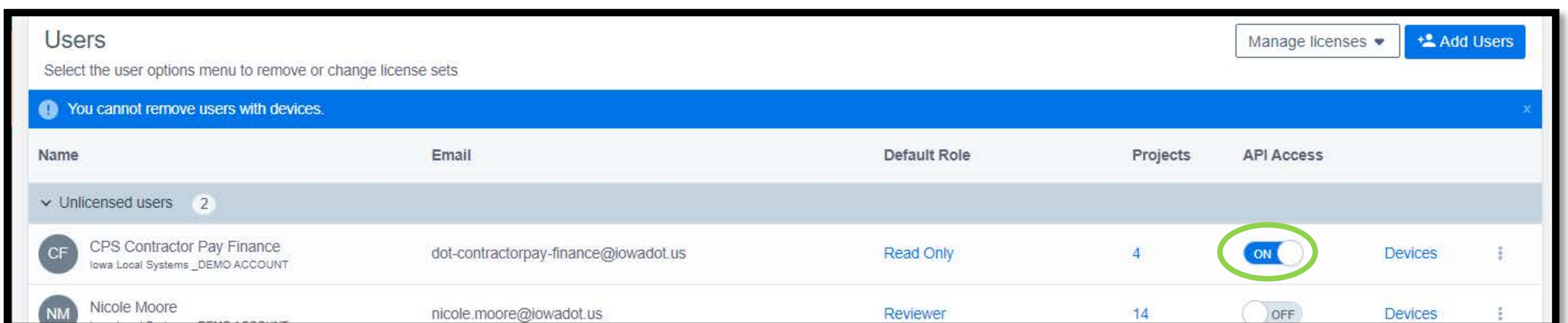
For county FM projects let on or after January 2024, payments will submit automatically to the Iowa DOT from Appia. In order for the automated submittal process to work, the CPS Contractor Pay Finance user must have access to the project, and the API Access toggle for this user must be "On". (To add 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".



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.

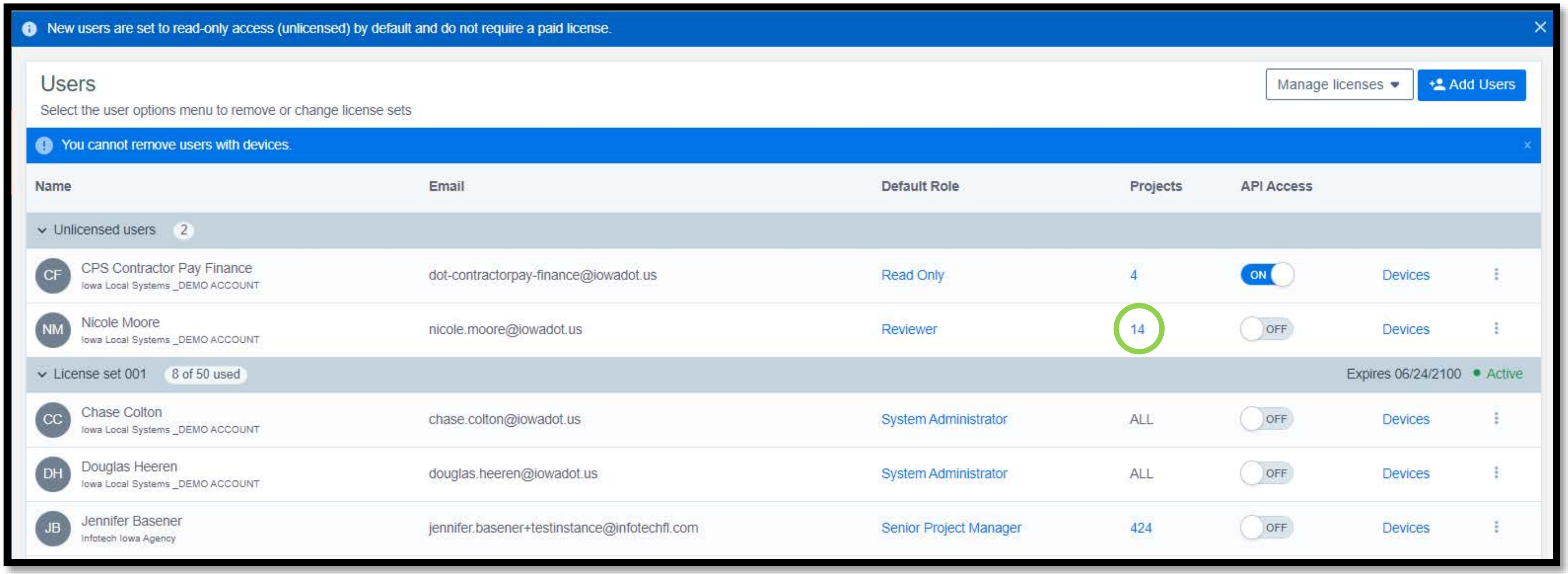


The toggle switch should now be on.

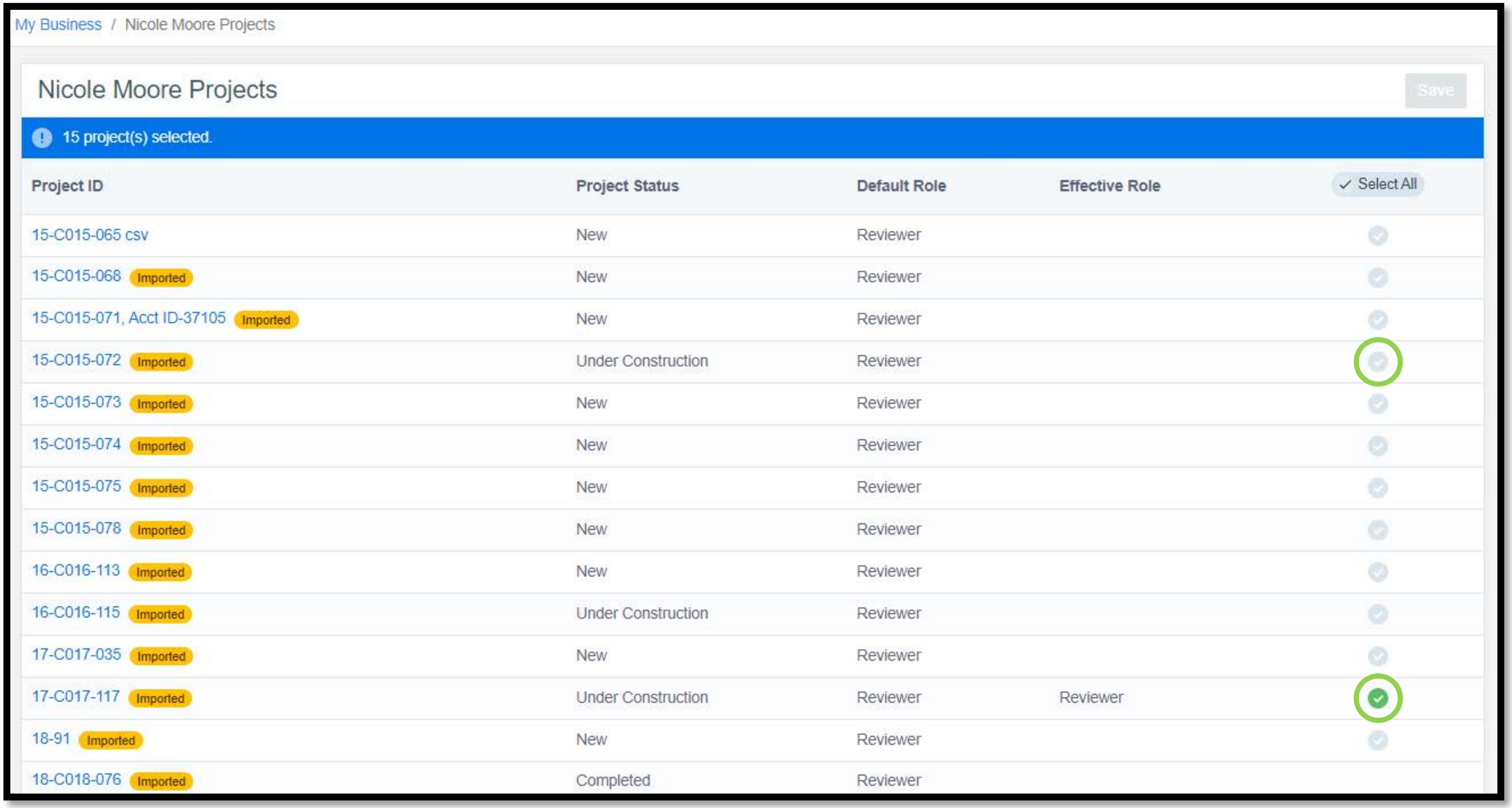


E. Viewing & Editing User Project Access

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



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

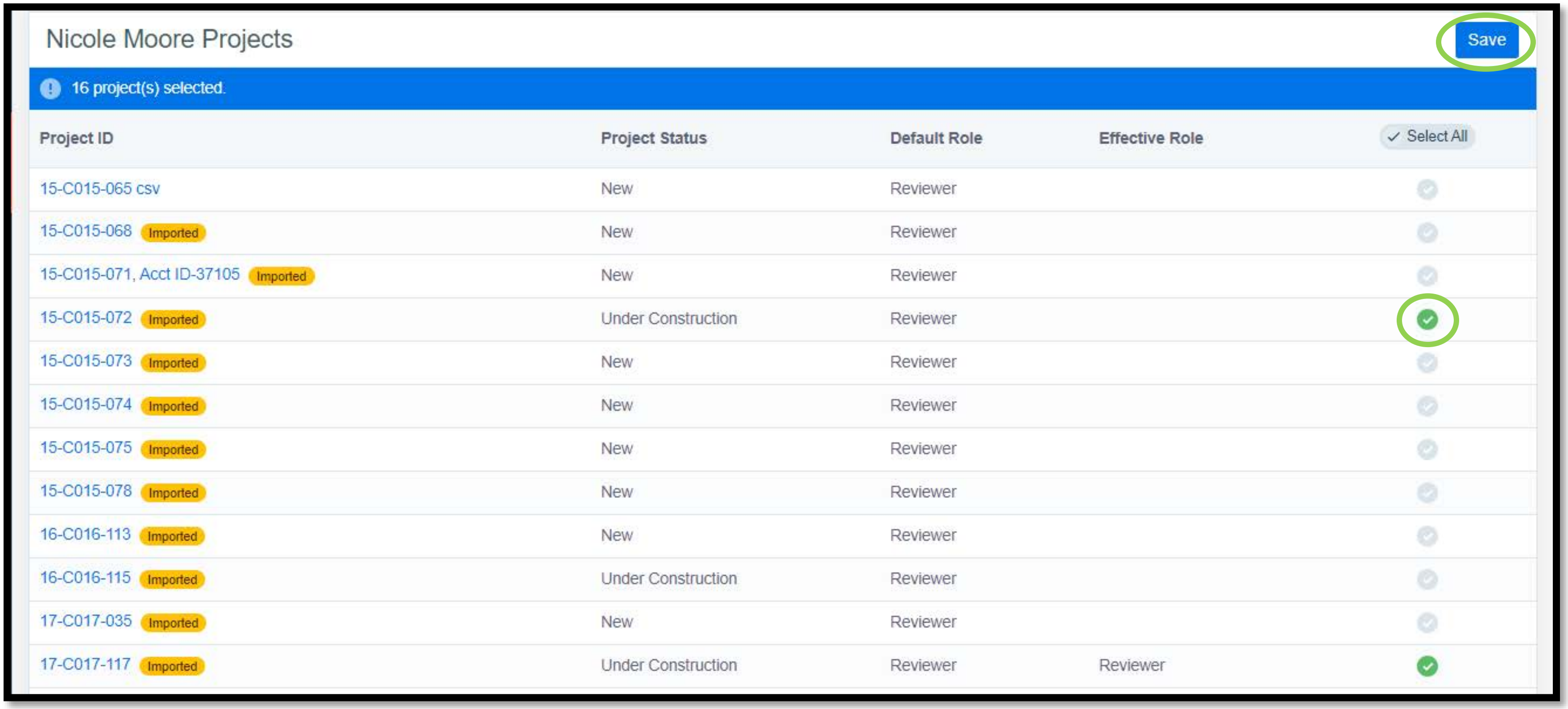
Nicole Moore Projects

Save

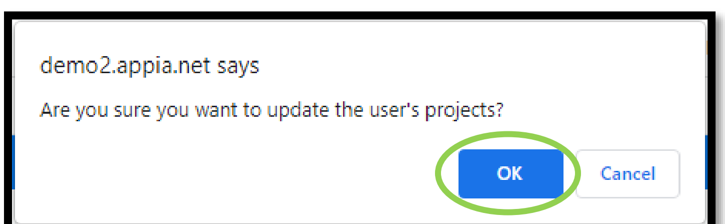
15 project(s) selected.

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	
18-91 Imported	New	Reviewer		
18-C018-076 Imported	Completed	Reviewer		

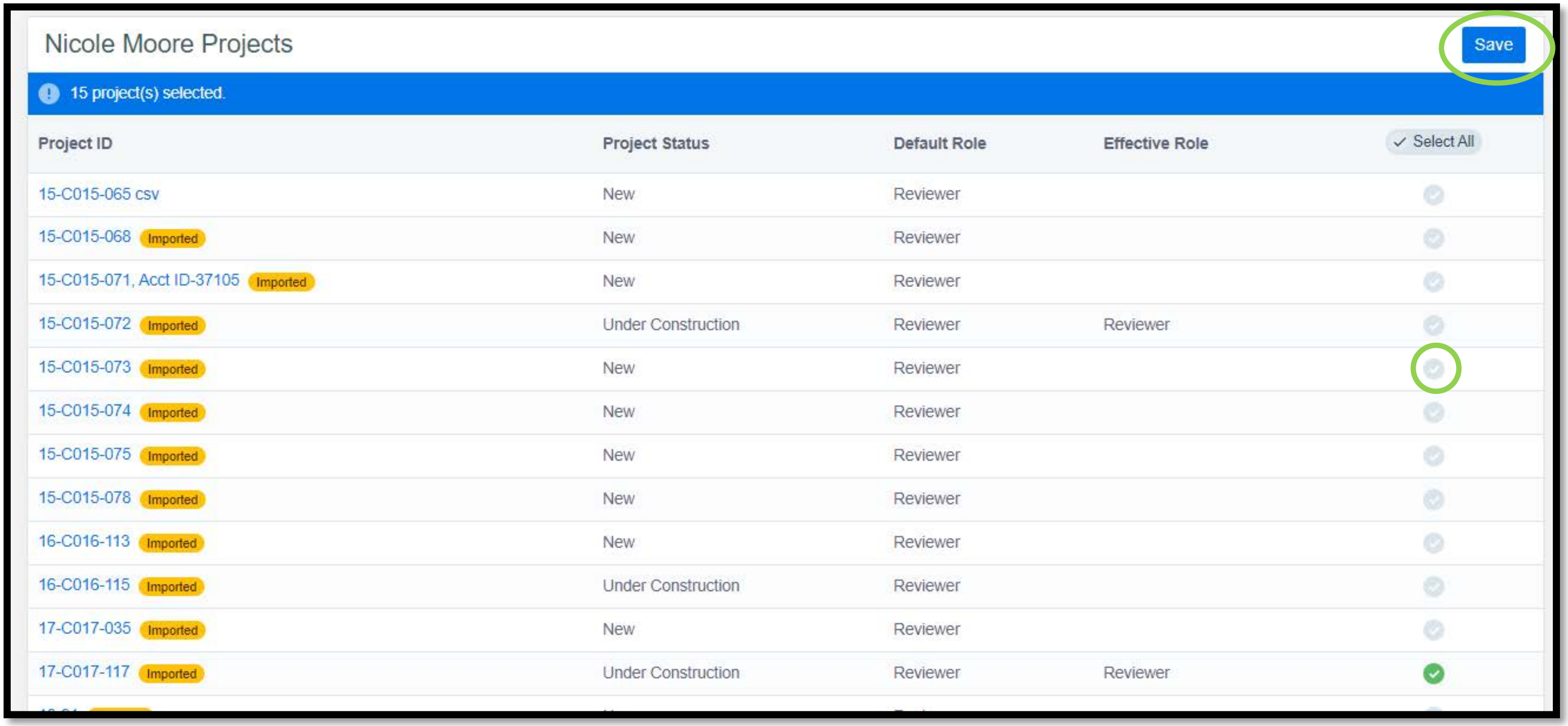
To add access to a project, simply click the circle with the check mark so that it turns green. Then hit the blue “Save” button in the upper, right corner. (Alternately, go into the desired project and add them within the project according to the Project Settings section.)



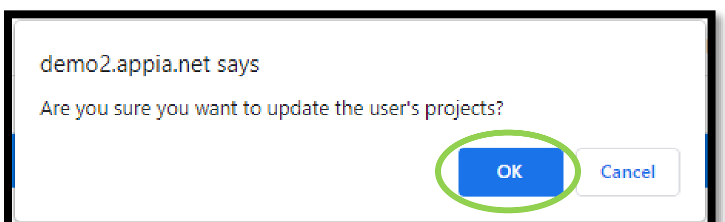
A box will pop up asking if you are sure you want to update the user’s projects. Click “Ok”.



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.

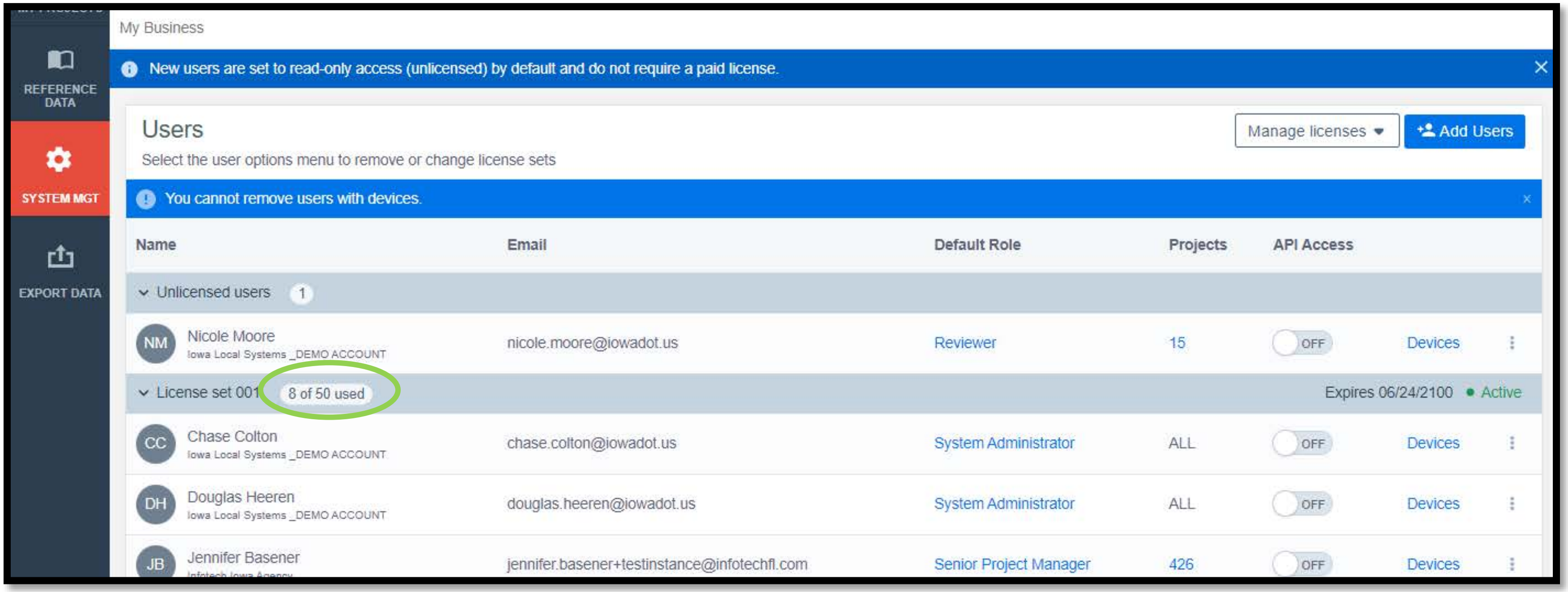


A box will pop up asking if you are sure you want to update the user's projects. Click "Ok".



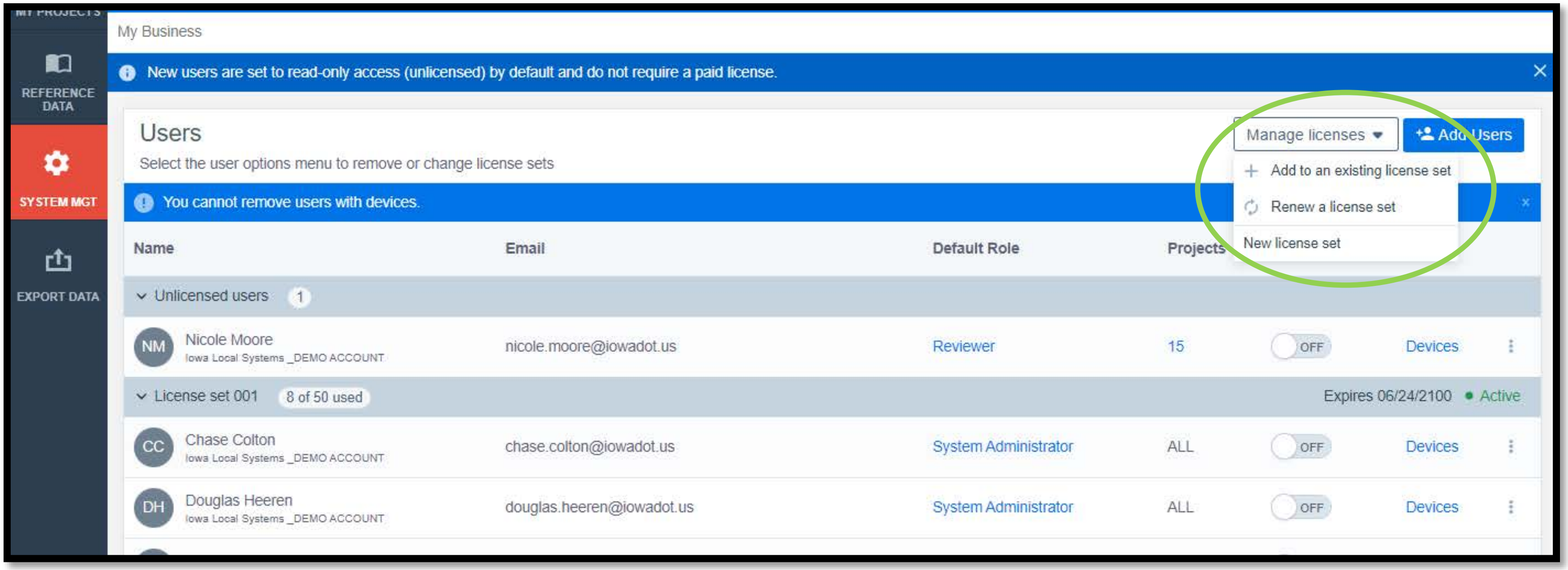
F. Licensing

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.



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.



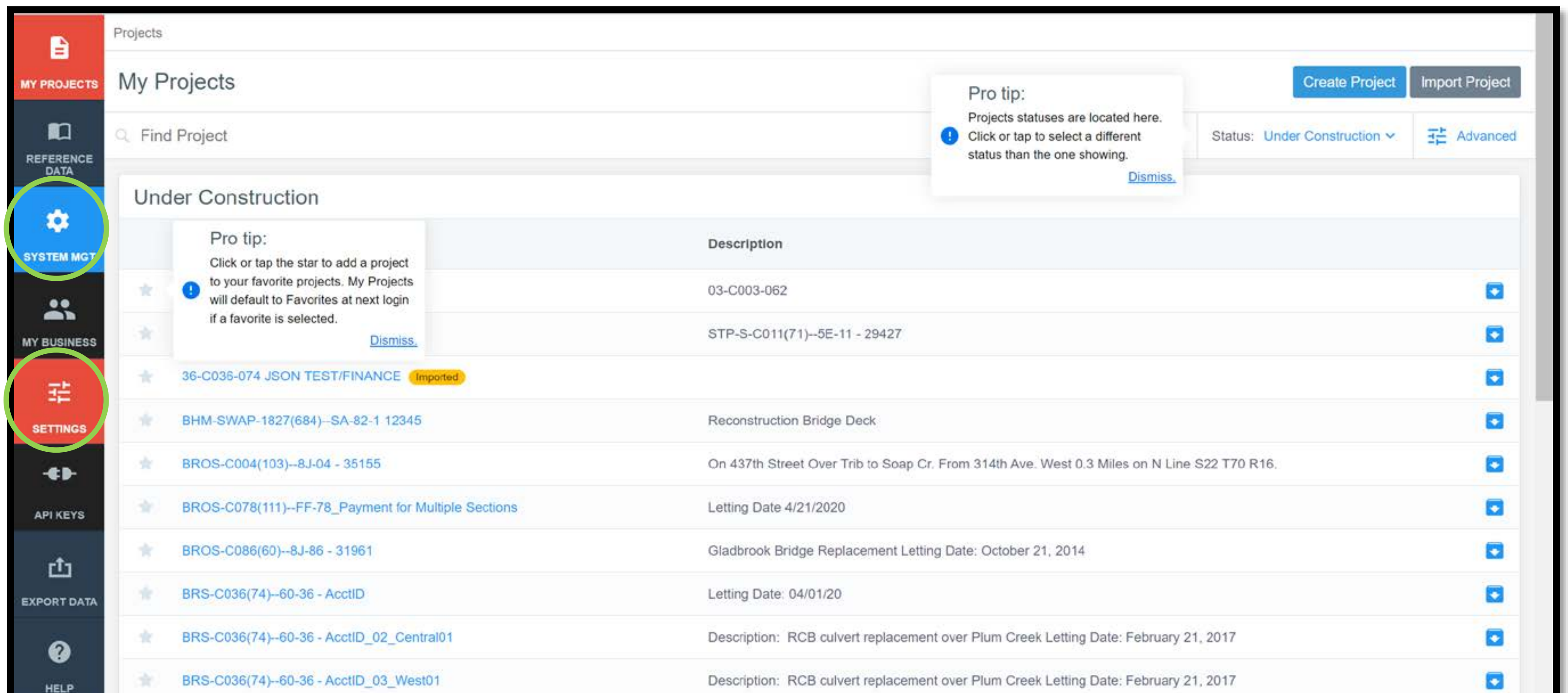
12 - Default Settings: Project Settings

(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.)

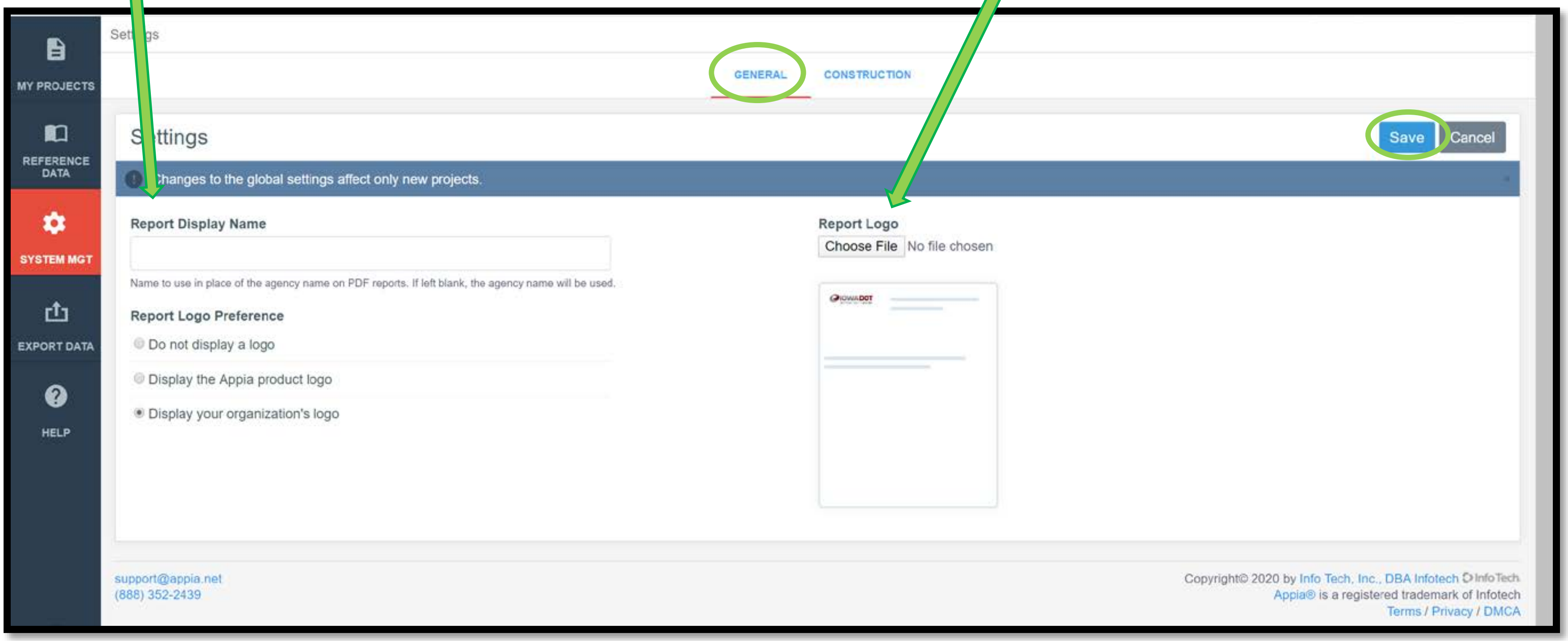


A. General Project Settings: Report Names and Logo

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

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

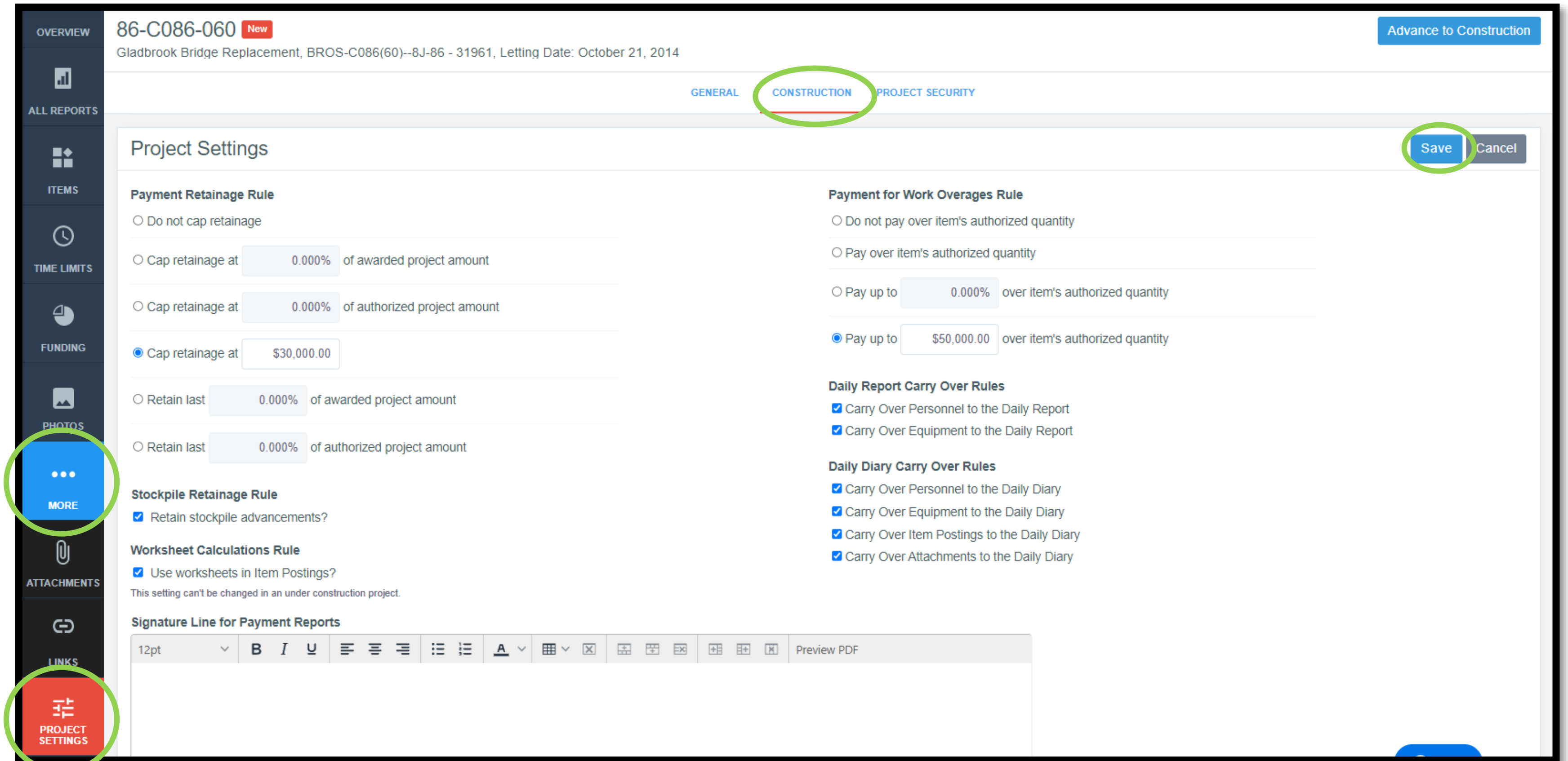
Upload a “Report Logo” (such as a county/city logo) if you have one available.
This will aid Finance in distinguishing whose account to debit for payments.



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”.



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.

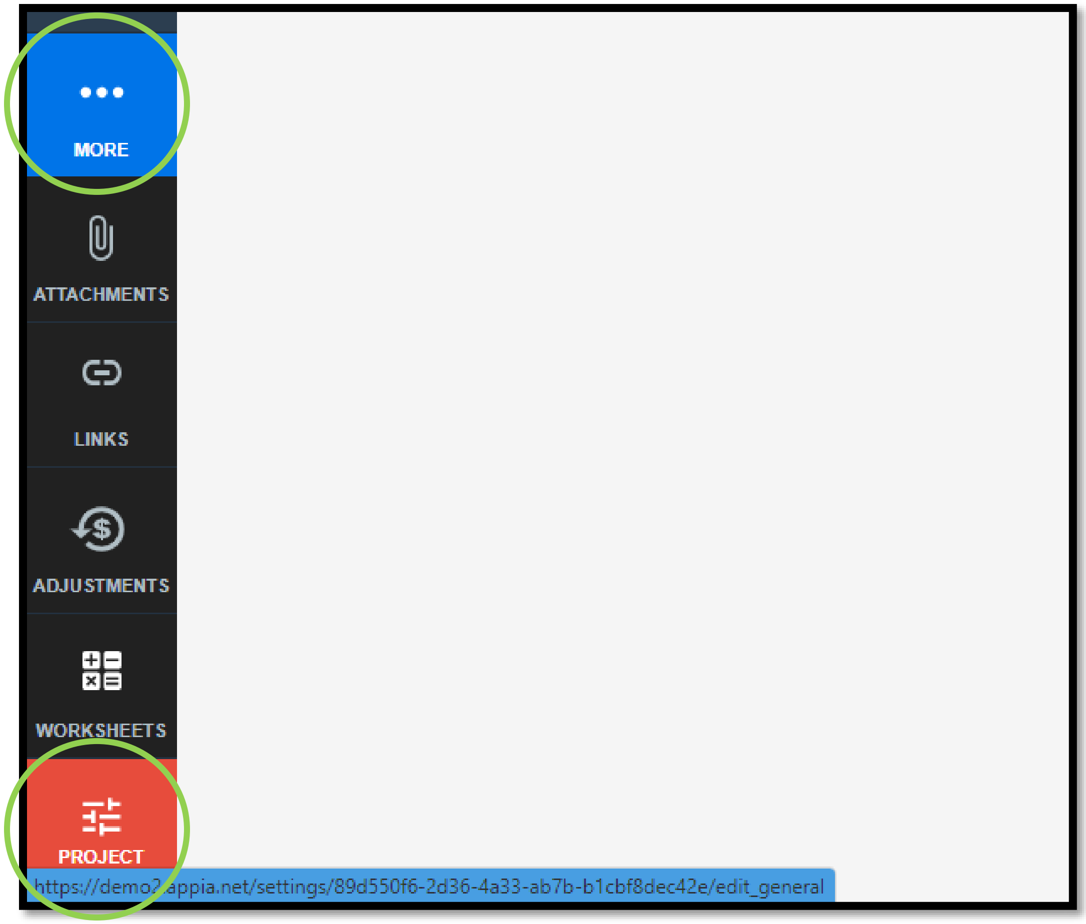
- Option 3: “Pay up to ____% over authorized item quantity”
  - This option will allow payment to be made on any item up to the specified % overage beyond the contract quantity.
  - A change order will be required to be processed for any payment exceeding the specified overage limit.
  - This option 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.)

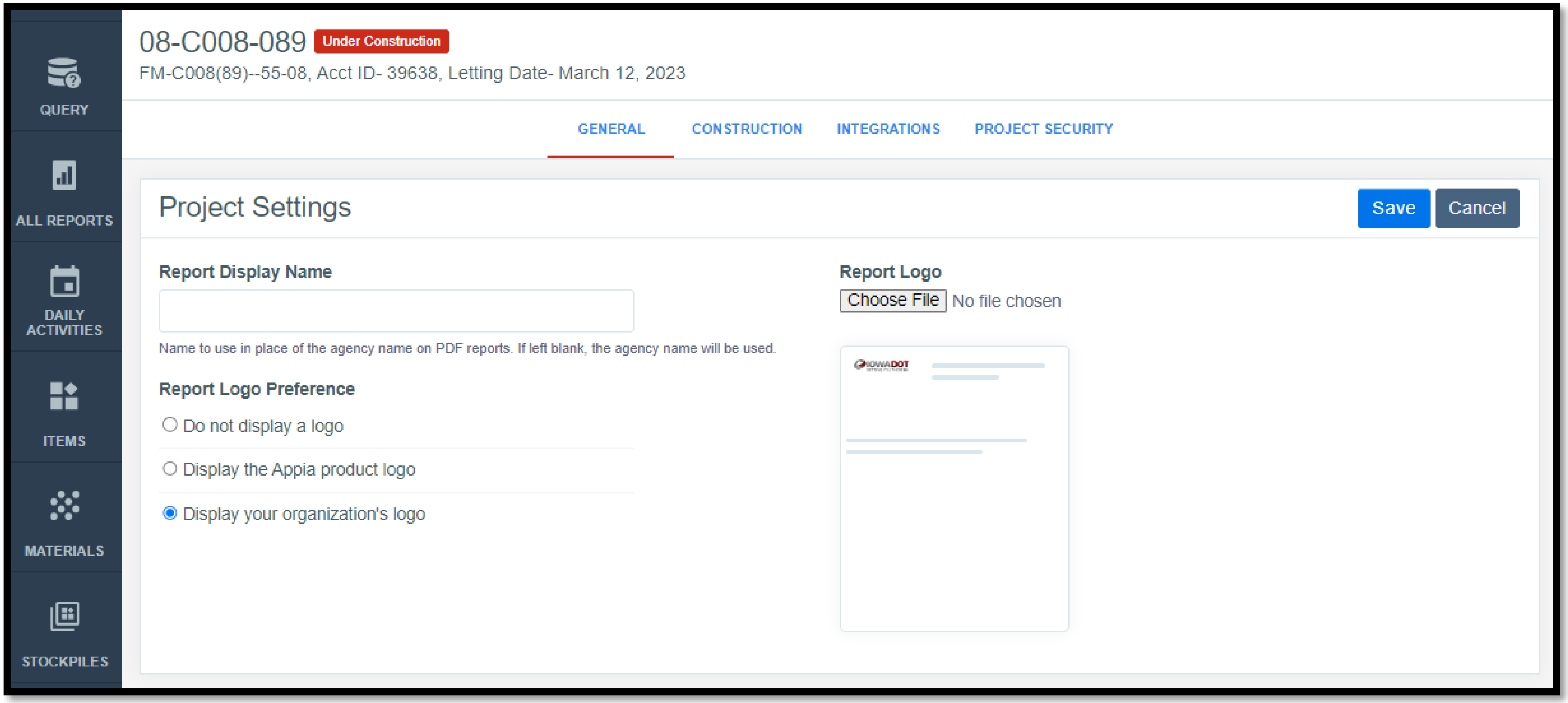
- Daily Report & Daily Diary Carryover Rules
  - If these boxes are left checked, the listed elements of Daily Reports and Daily Diaries will be copied to newly created reports/diaries so the user does not need to enter the information again on each report.
  - Note, if left checked, the inspector entering 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.)





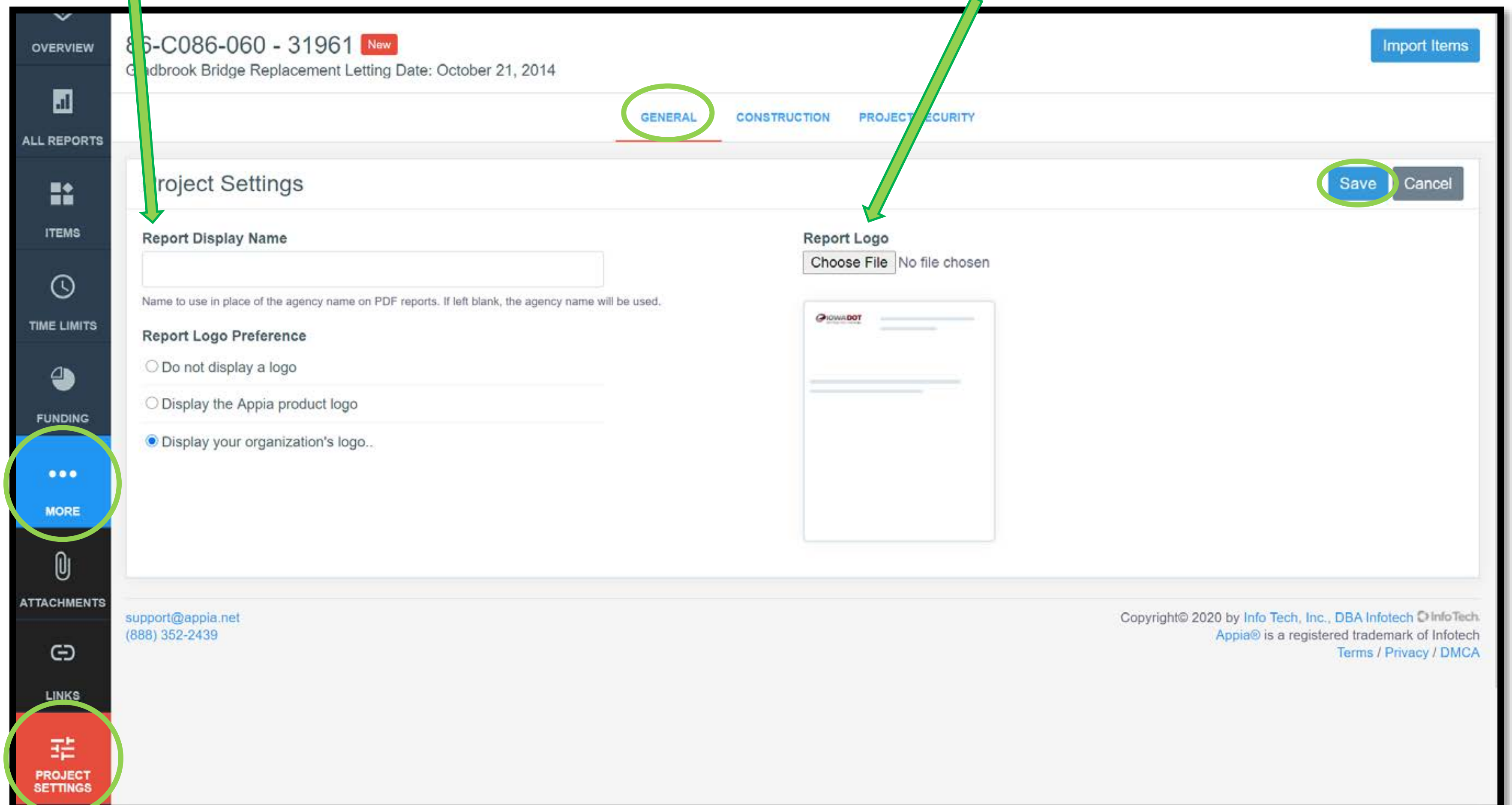
QUERY
ALL REPORTS
DAILY ACTIVITIES
ITEMS
MATERIALS
STOCKPILES
08-C008-089
Under Construction
FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023
GENERAL
CONSTRUCTION
INTEGRATIONS
PROJECT SECURITY
Project Settings
Save
Cancel
Report Display Name
Name to use in place of the agency name on 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

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.

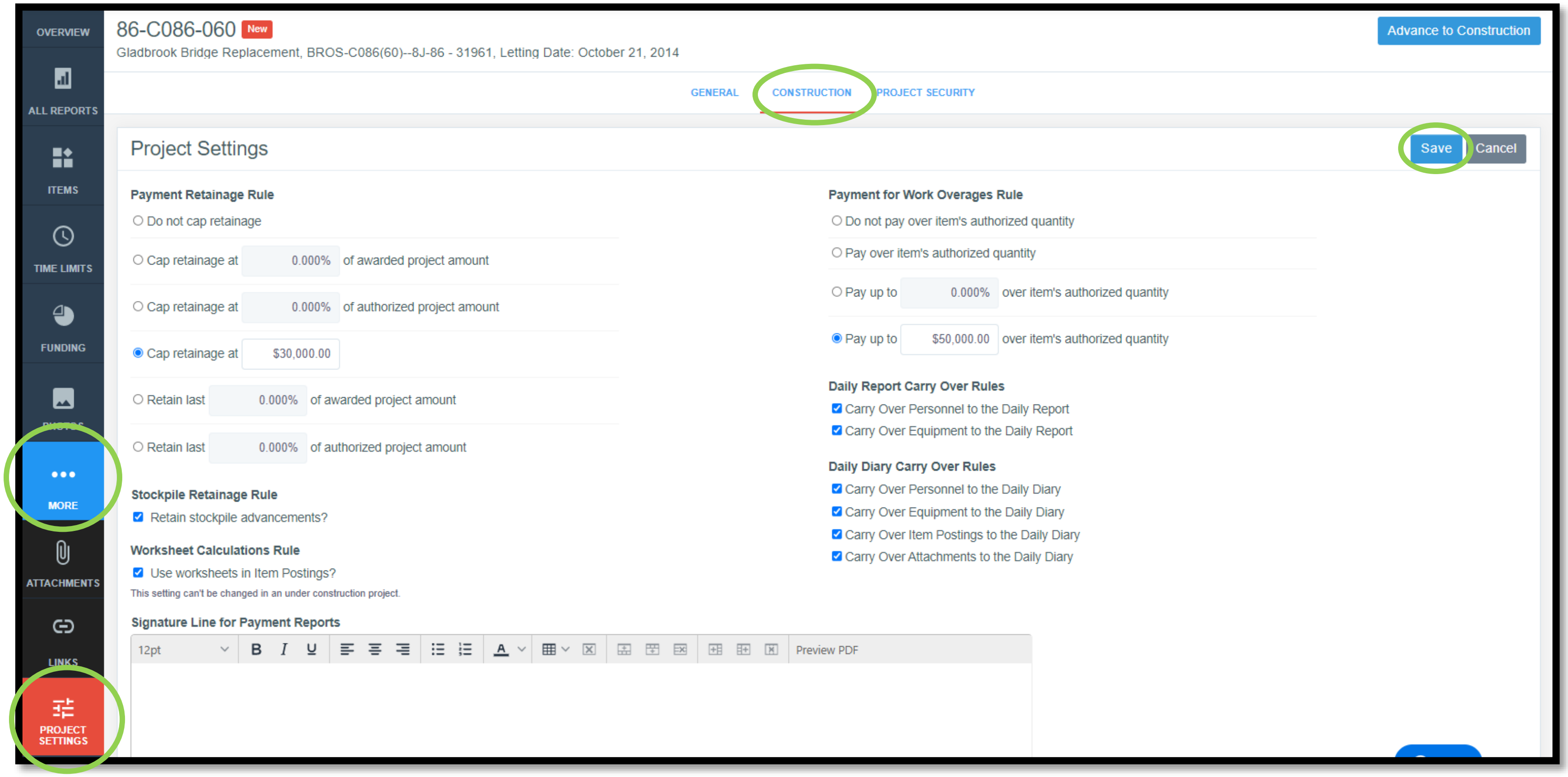
Upload a “Report Logo”, such as your County or City logo, if you have one available.
This will aid Finance in distinguishing whose account to debit for payments.



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".



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.)

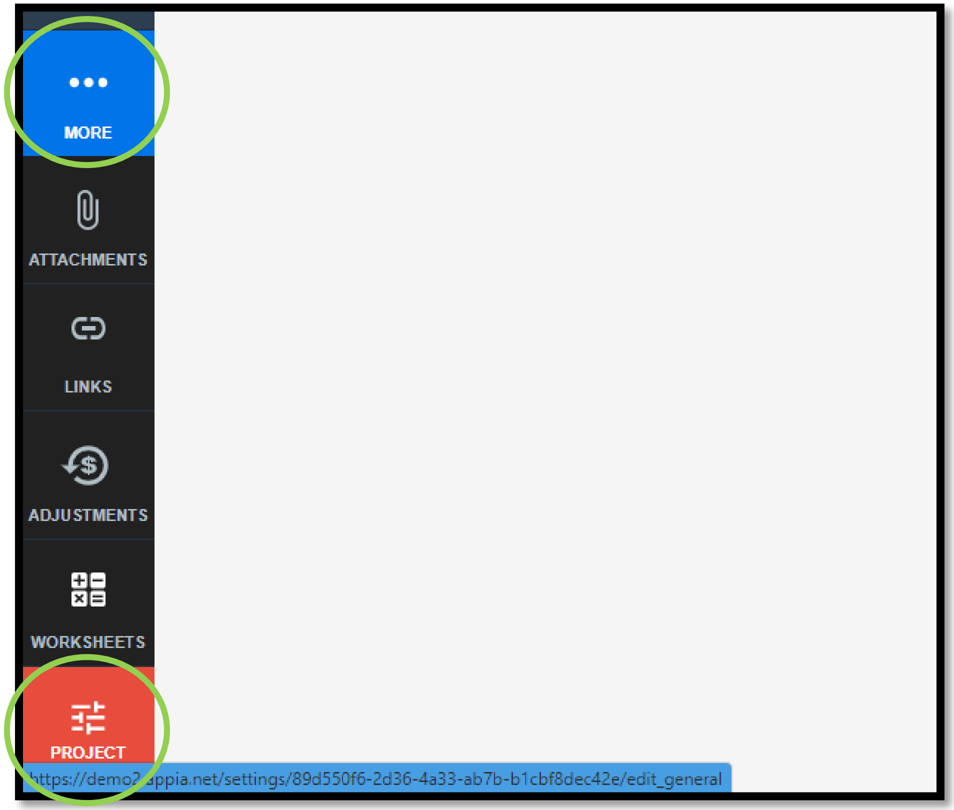
- Daily Report & Daily Diary Carryover Rules
  - If these boxes are left checked, the listed elements of Daily Reports and Daily Diaries will be copied to newly created reports/diaries so the user does not need to enter the information again on each report.
  - Note, if left checked, the inspector entering the information in the reports/diaries must be diligent in recording changes from day to day if there are any.

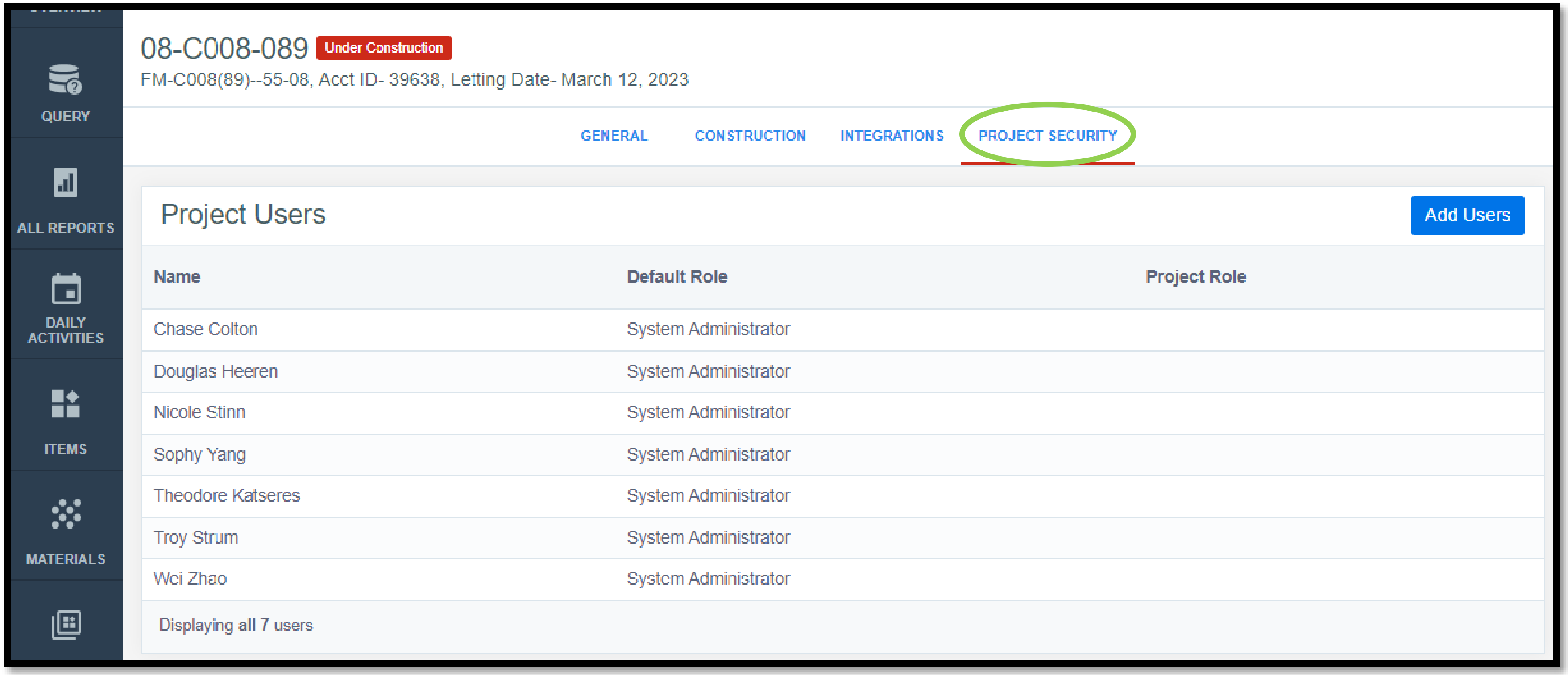
C. Integrations

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".

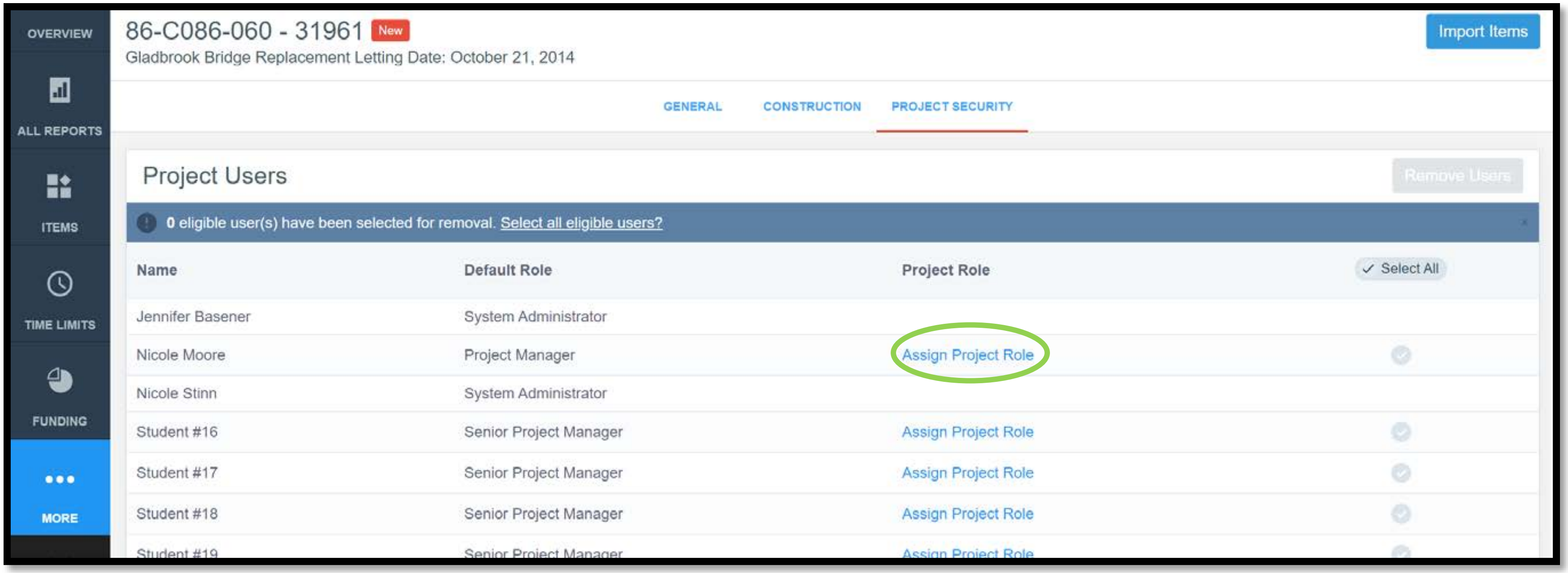




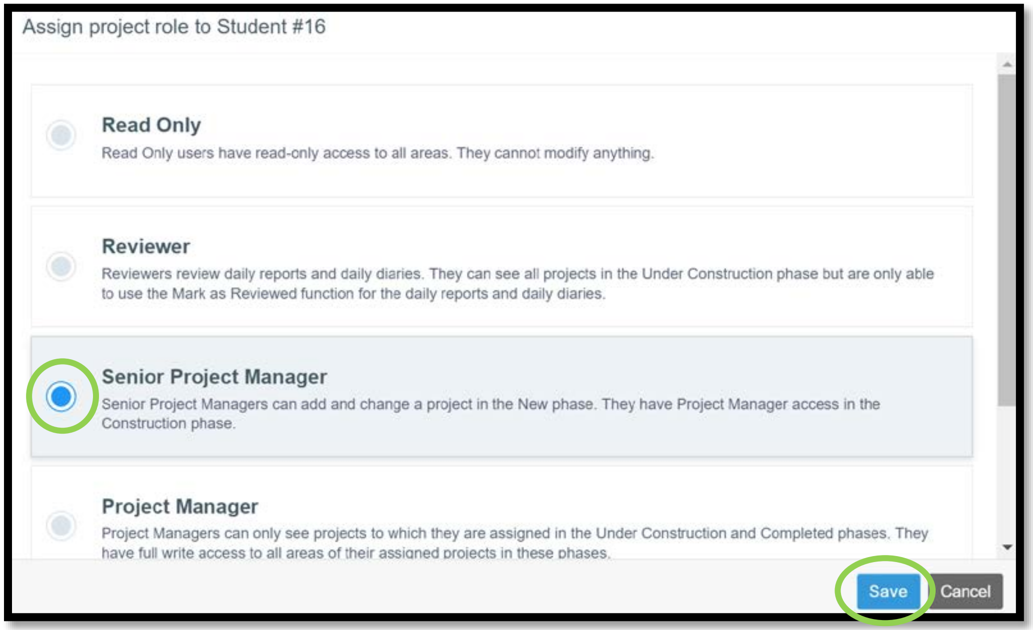
This is where you can view which users have access to the selected project.

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.)

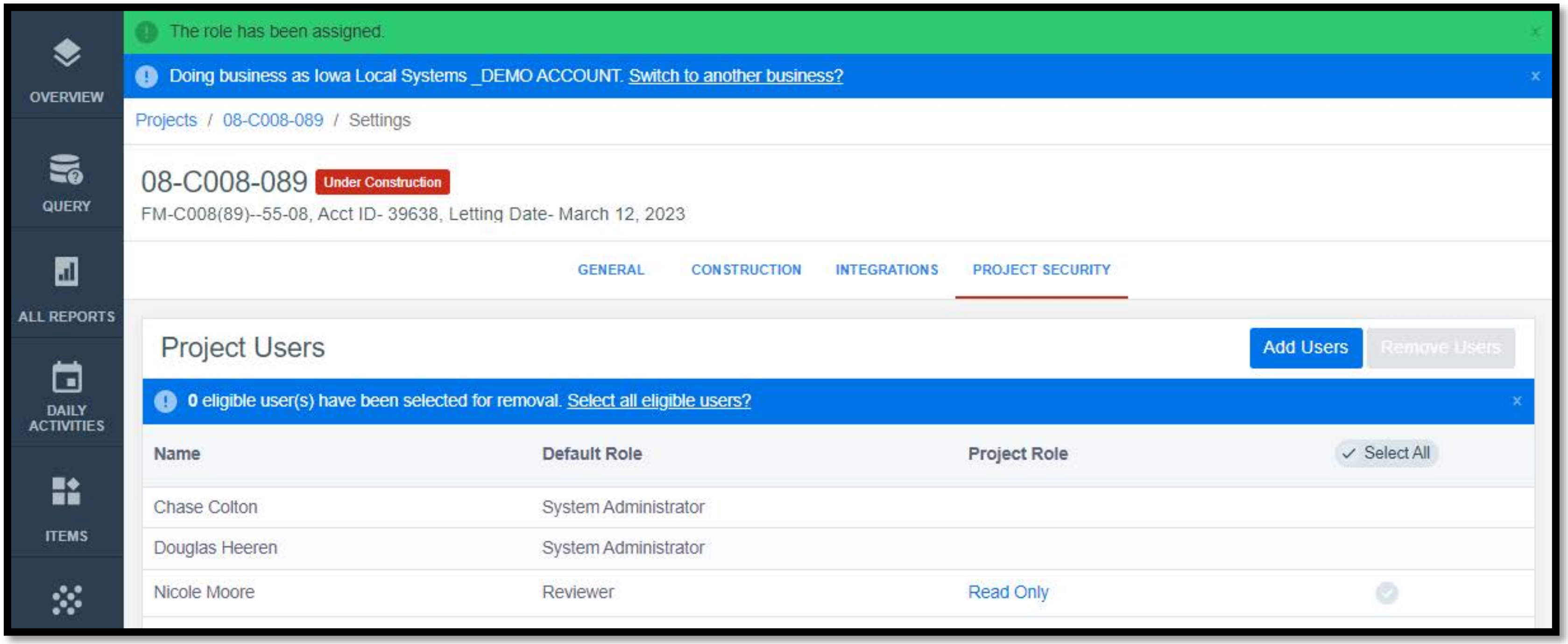
Each user that has access to the project is shown in this screen. Users are automatically assigned to their default roles when a project is created. If you want to change their role for this particular project, click on the blue "Assign Project Role" text in the "Project Role" column.


OVERVIEW
ALL REPORTS
ITEMS
TIME LIMITS
FUNDING
MORE
86-C086-060 - 31961
New
Gladbrook Bridge Replacement Letting Date: October 21, 2014
Import Items
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
Select All
Jennifer Basener
System Administrator
Nicole Moore
Project Manager
Assign Project Role
Nicole Stinn
System Administrator
Student #16
Senior Project Manager
Assign Project Role
Student #17
Senior Project Manager
Assign Project Role
Student #18
Senior Project Manager
Assign Project Role

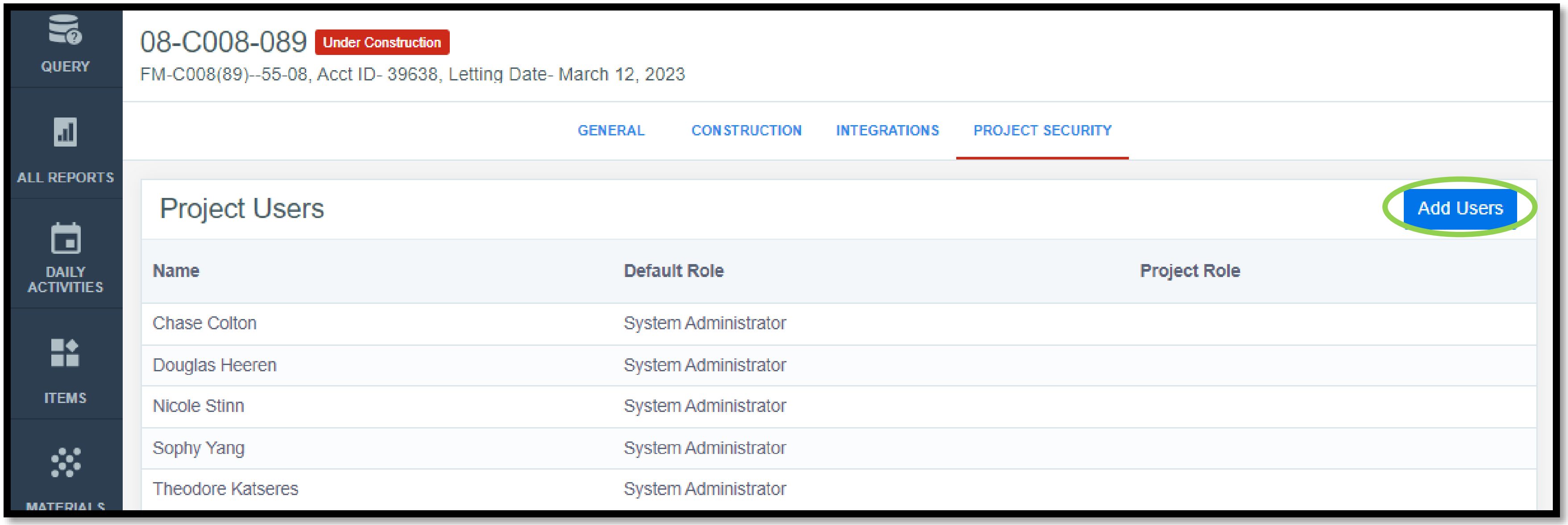
A window will pop up in which each of the user roles are explained. Click on the radio button on the left side of the role you desire for the user. Click “Save” when finished.



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.



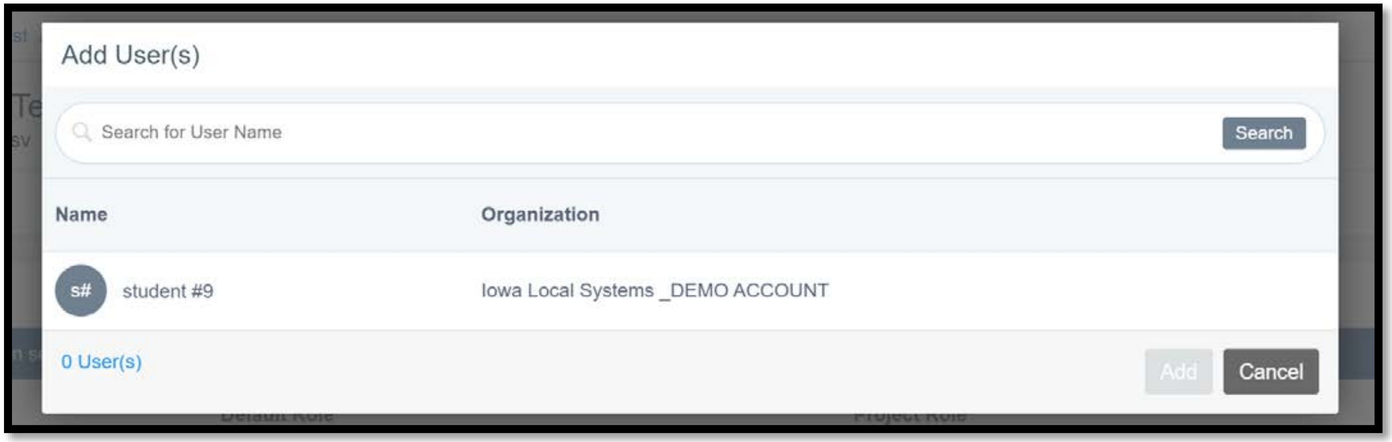
To add users to the project, click on the “Add Users” button on the right side. Added users will be assigned the default role. Once added you may need to change their role as explained above.



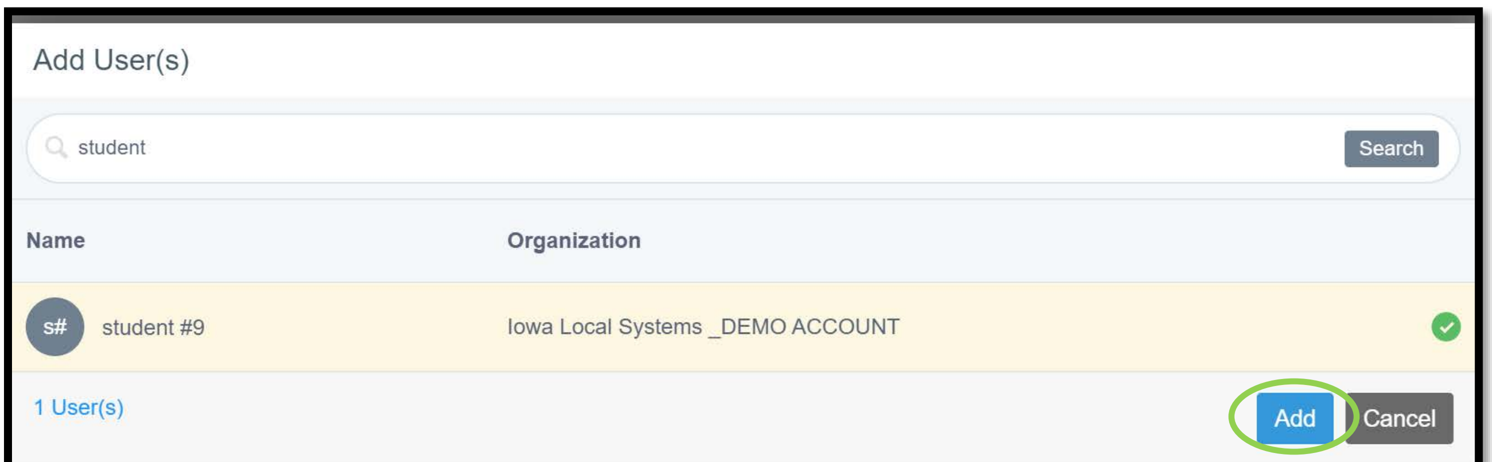
Note: The “Add User” button will not show up if all users in your account are already assigned to the project.

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

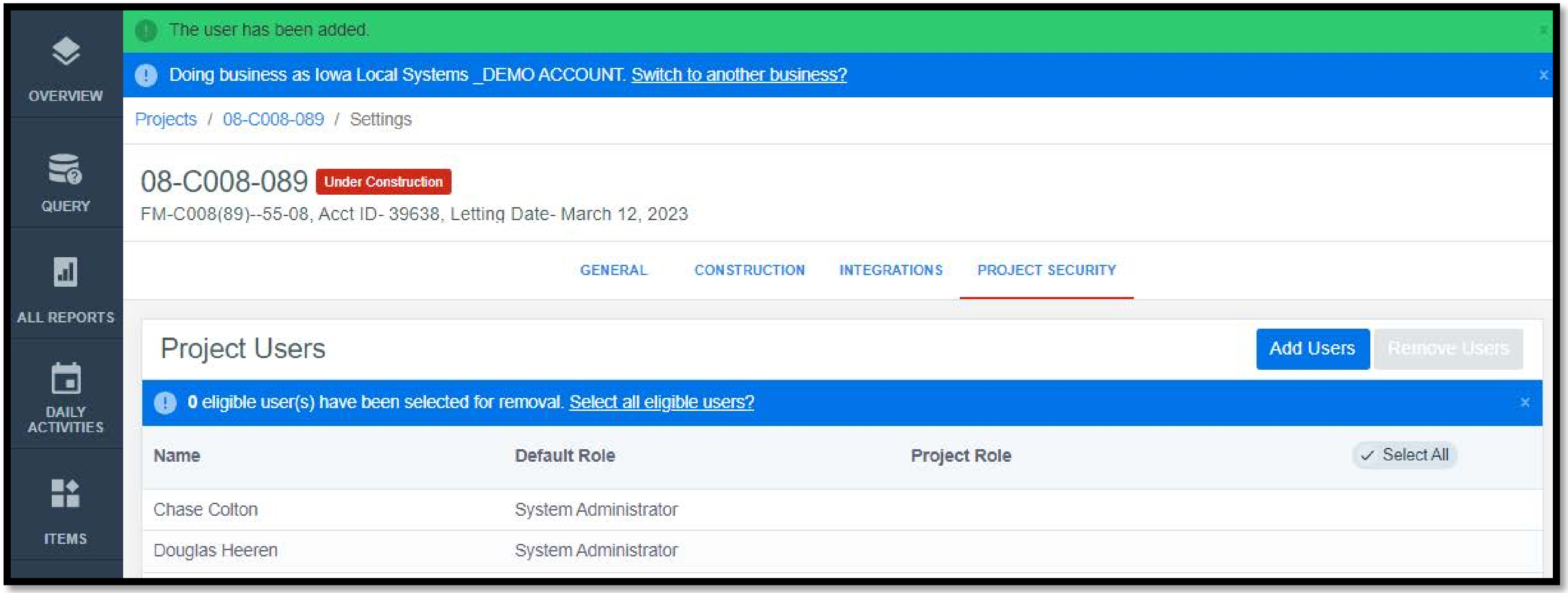
Note: If the user cannot be found, they may not have been added to your Appia account yet. In that case, you will need to go to the "My Account" page and add them. (See the Setting Up Appia & "My Account" Screen section of the instructional manual.)



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".



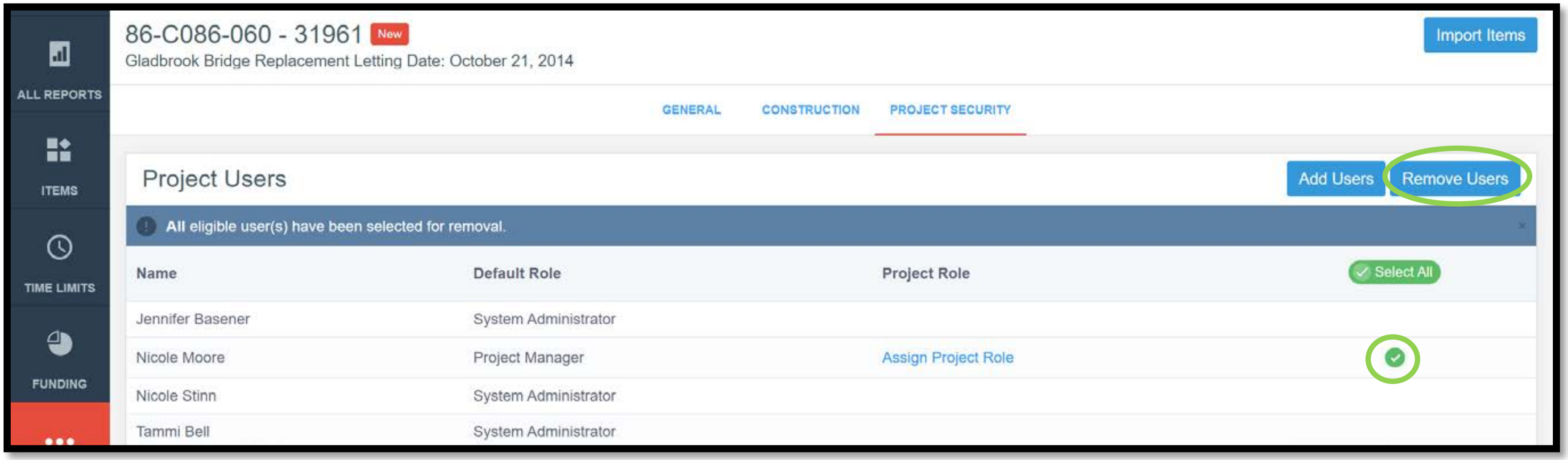
You will be taken back out to the screen showing the user list. A green ribbon will appear across the top if the user was added successfully.



The 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.

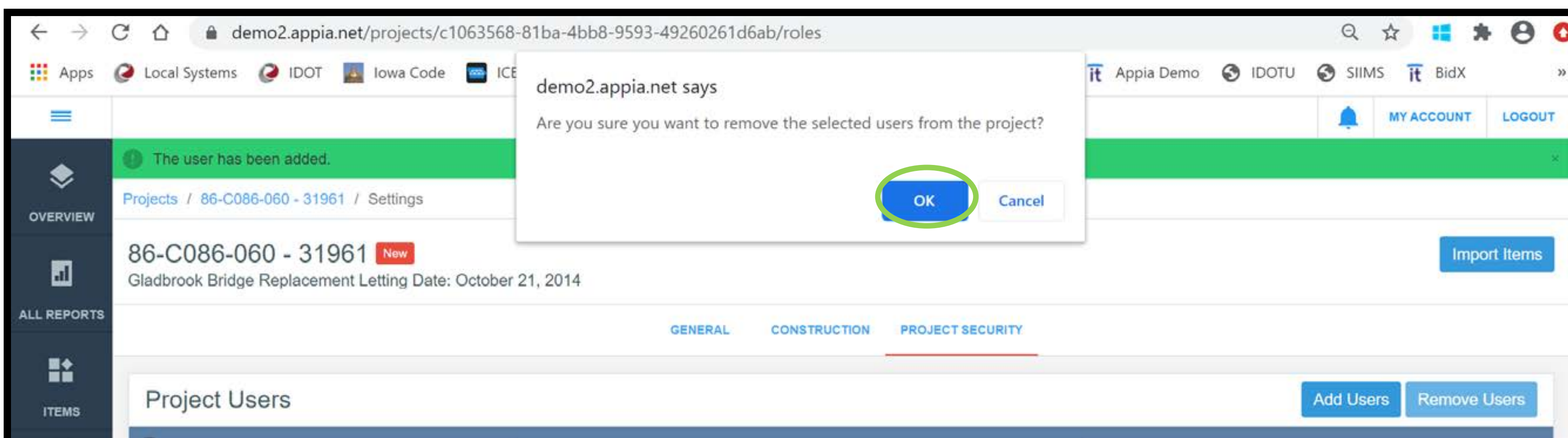
- The appropriate regional Field Engineer (Local Systems projects)
- The appropriate regional Field Technician (Local Systems projects)
- The Grant Manager (Systems Planning projects)
- The Secondary Roads Engineer (All projects)
- The e-Construction Administrator (All projects)
- CPS Contractor Pay 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.



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

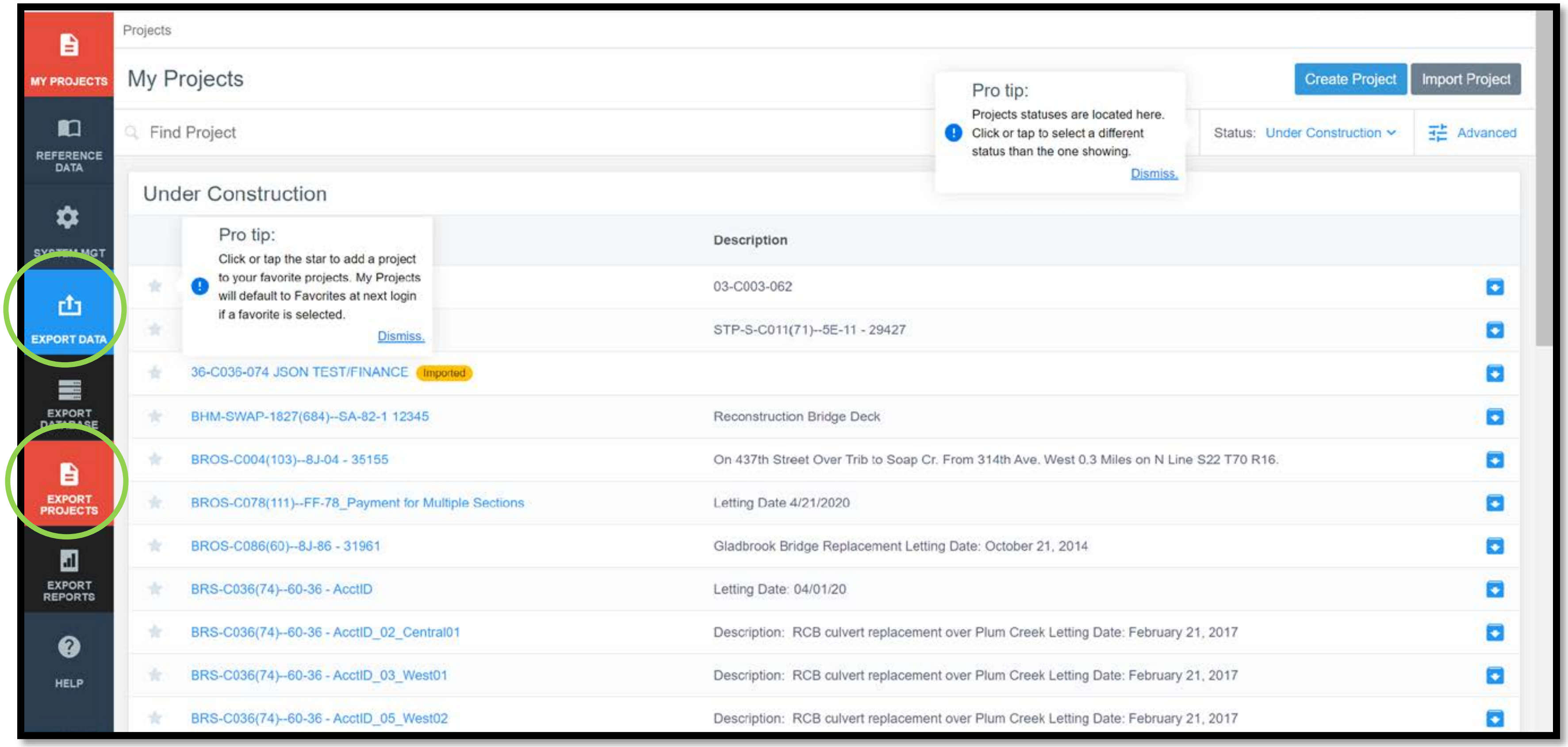
A box will pop up asking you to confirm your choice. Click "Ok".



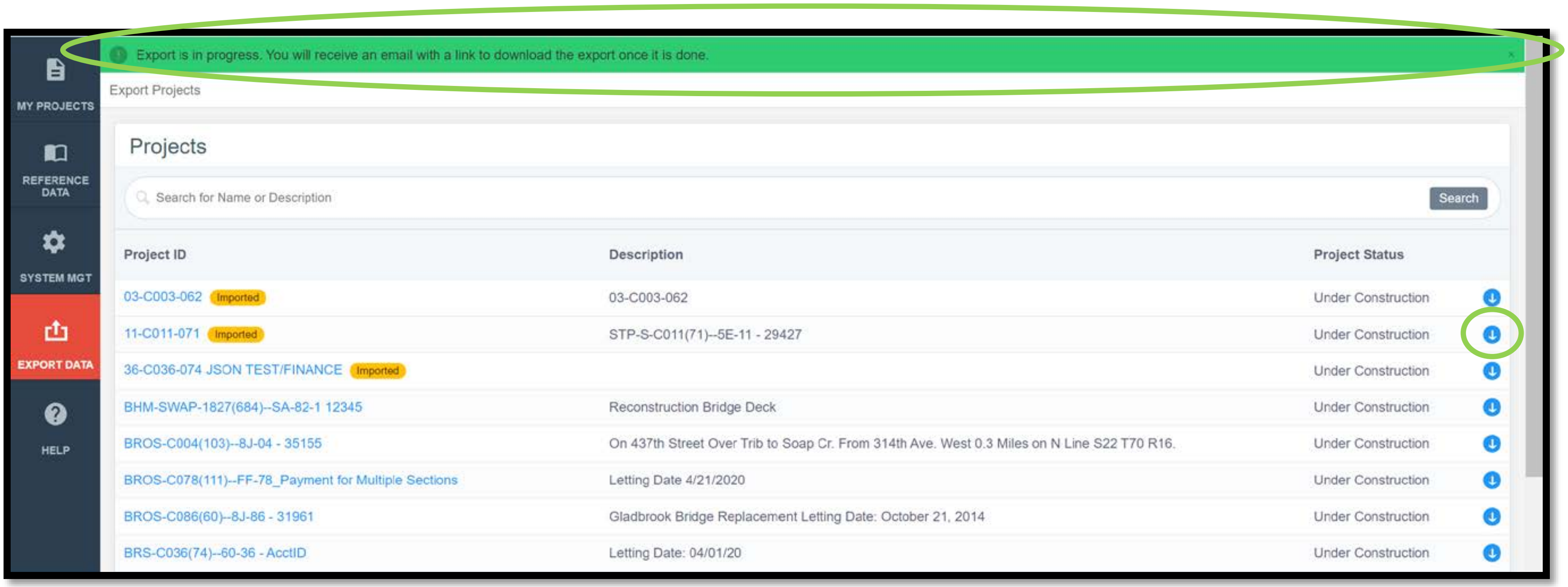
14 - Exporting Data: Export Project

(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.

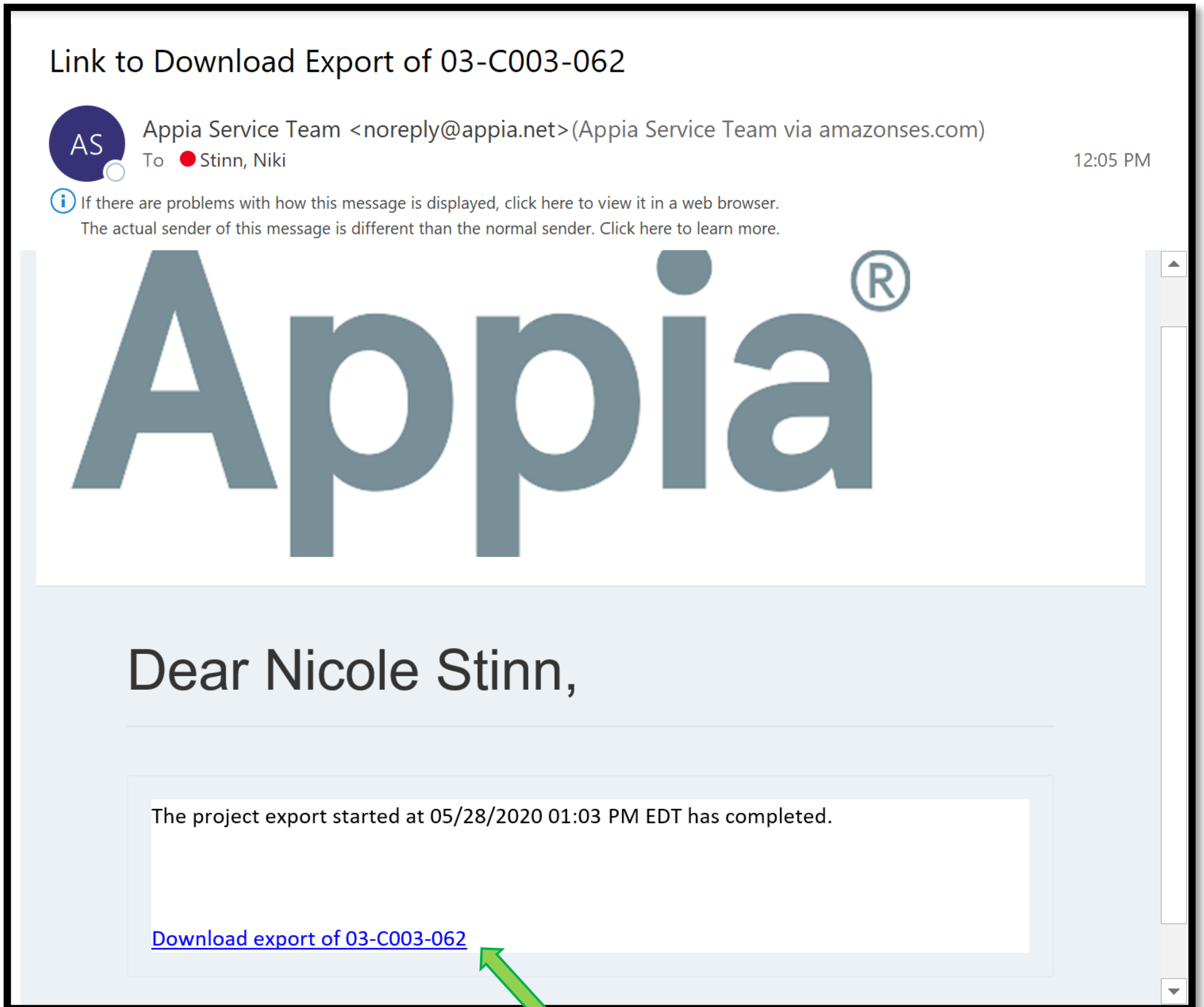


Push the “Export Project” button to download the data for the desired project. This is the blue circle with the down arrow on the right side of the line listing the project.



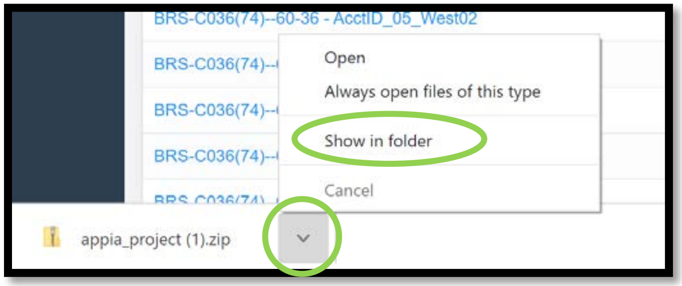
After pushing the “Export Project” button, a green ribbon will appear across the top of the screen saying that the download is in progress, and you will receive an email link once it is done.

The email will look like this.

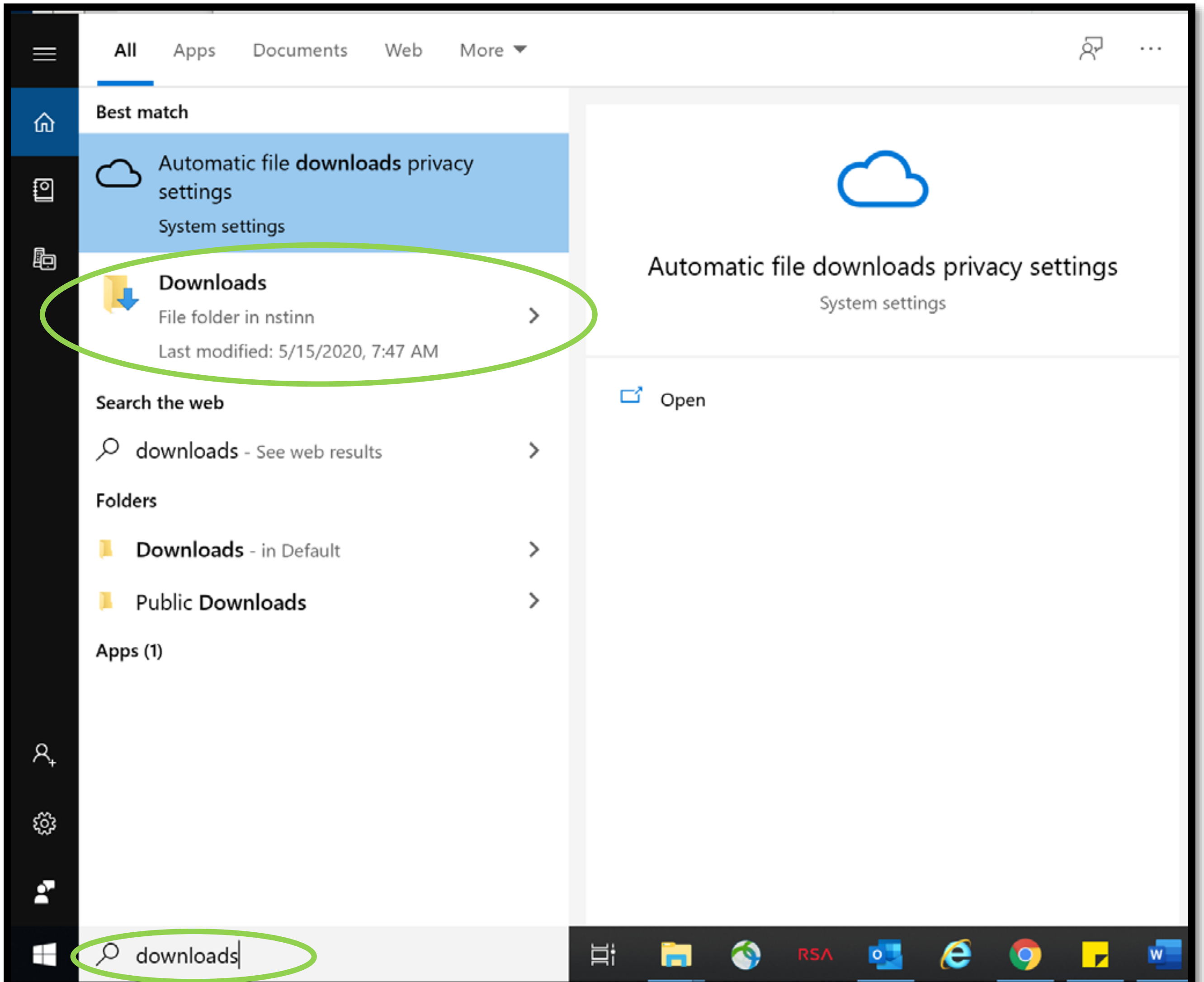


Click on the link here to download the project data.

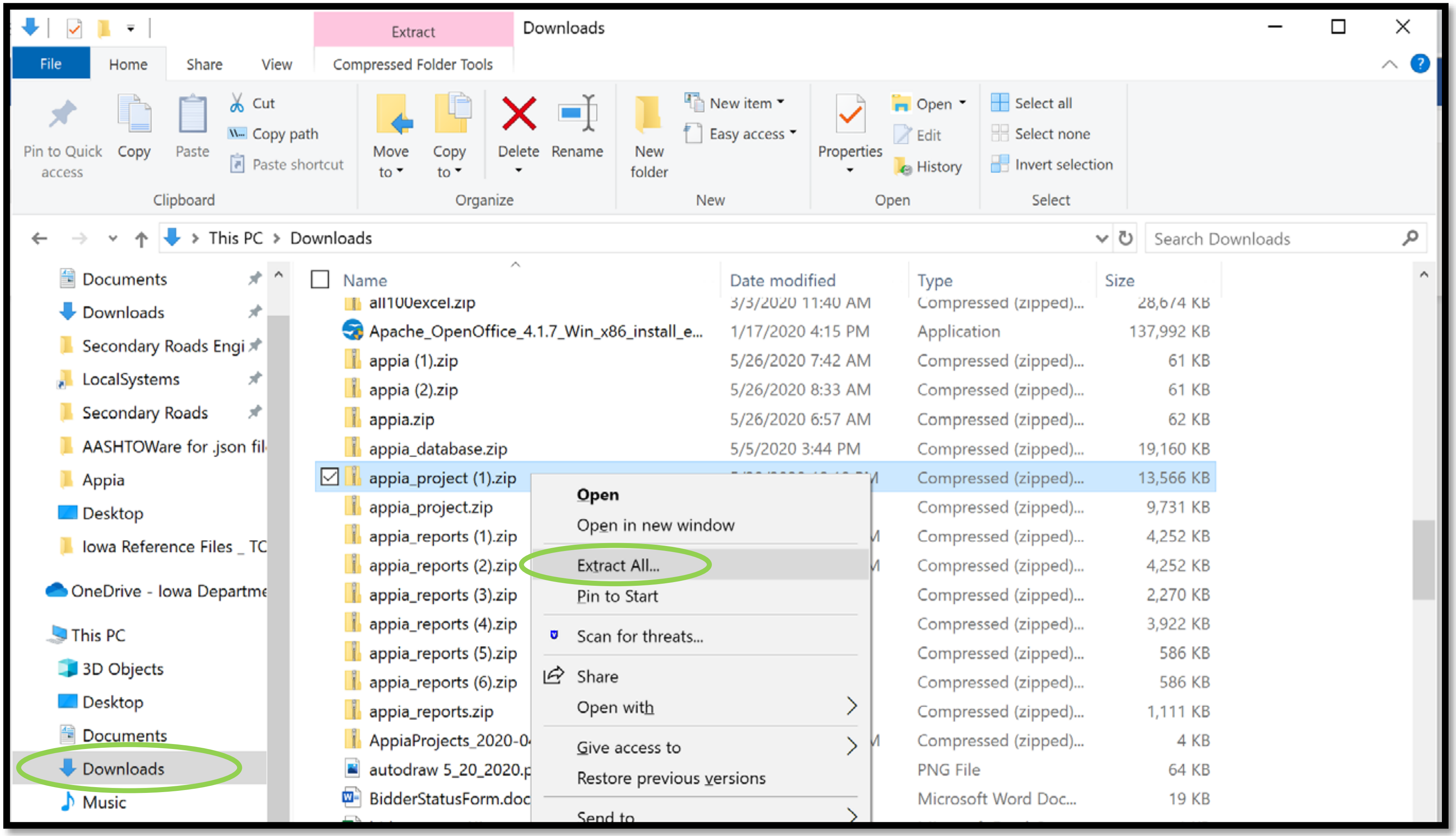
Depending on your browser, your file download may show up at the bottom like this. Click on the arrow to the right of the file name and then "Show in folder" to view the files.



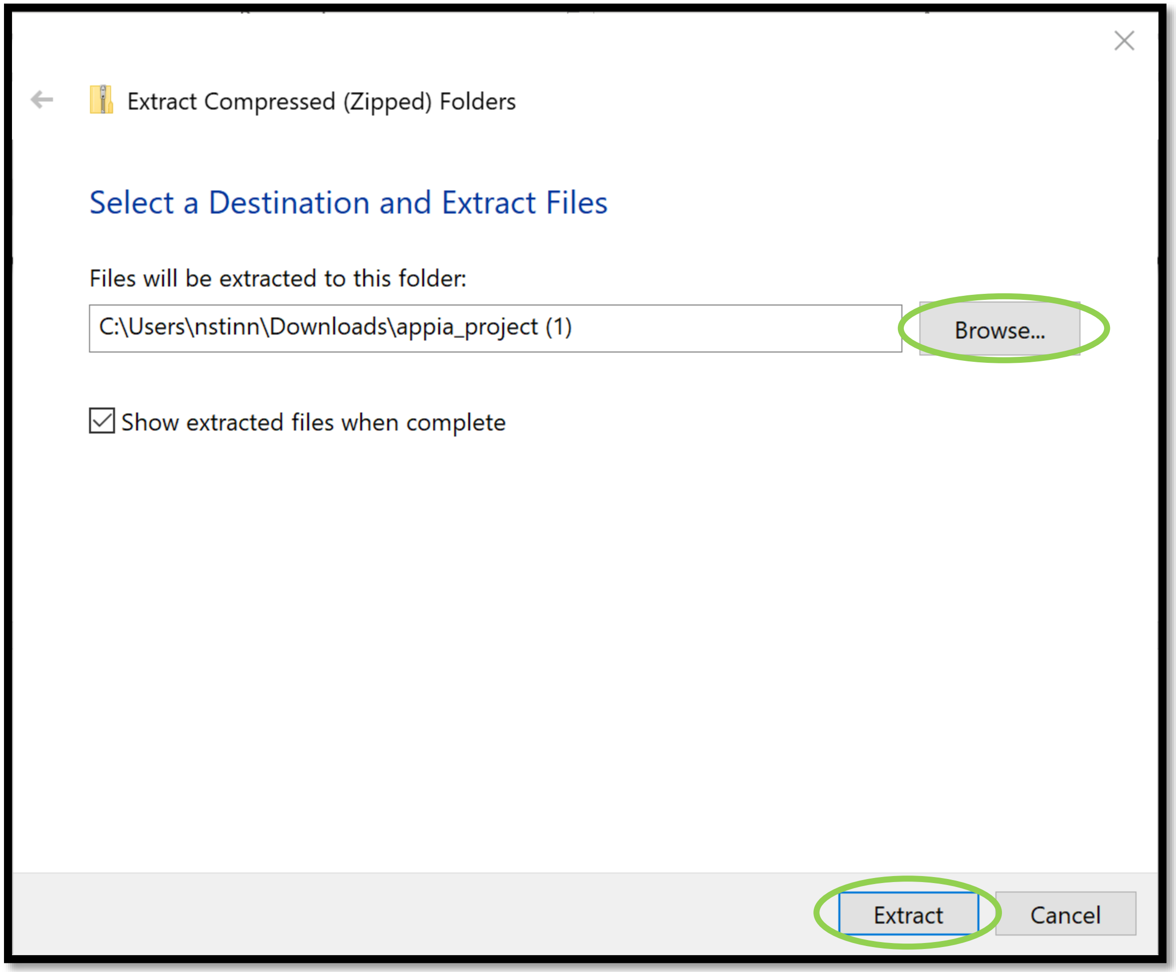
Alternately, once you have clicked on the link in the email, your zipped file can be found in the "Downloads" folder in your file explorer. The "Downloads" folder can be found by typing "downloads" in your search bar.



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

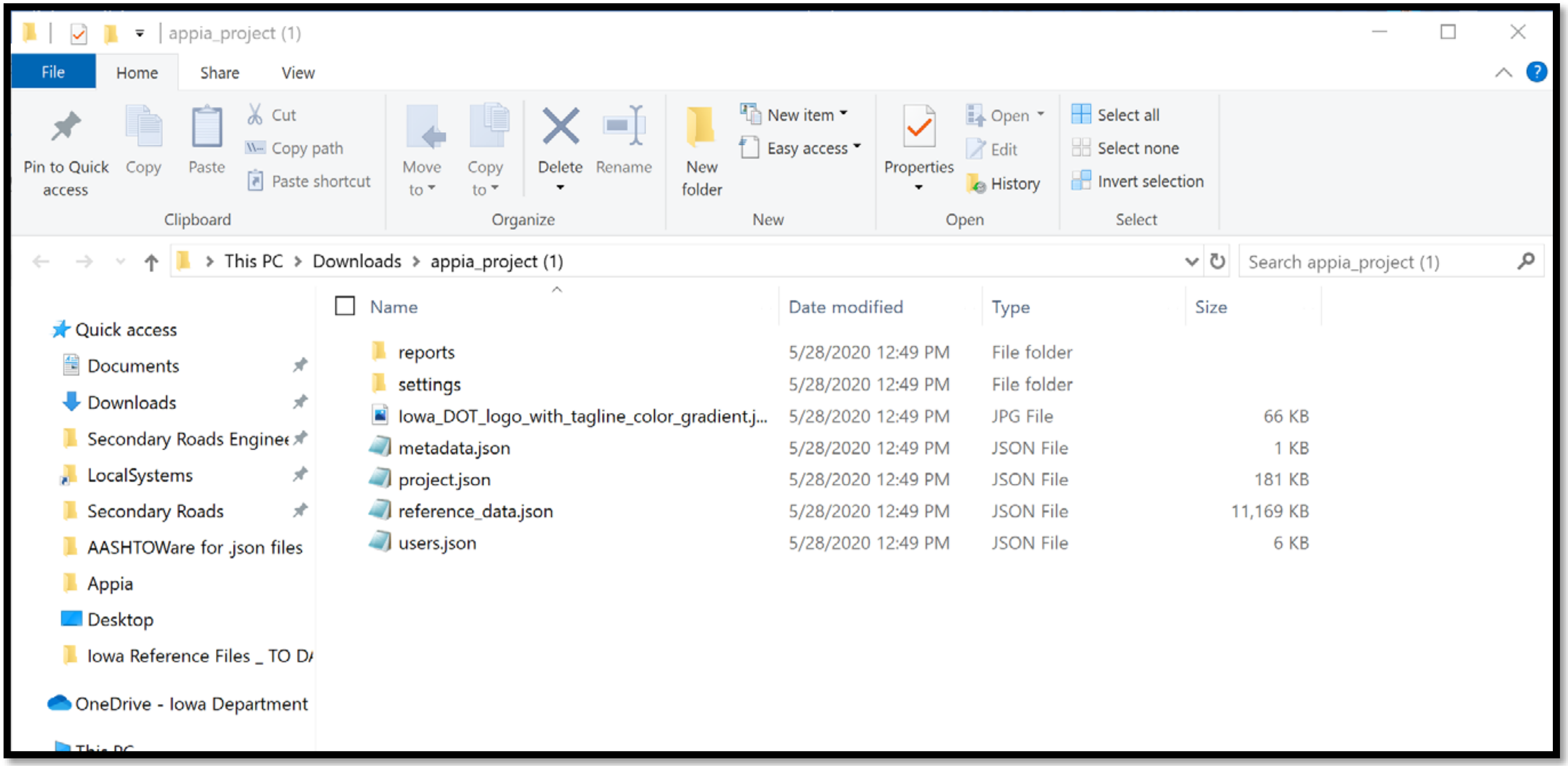


This window will pop up. Browse to find the location where you would like to save your project data.



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

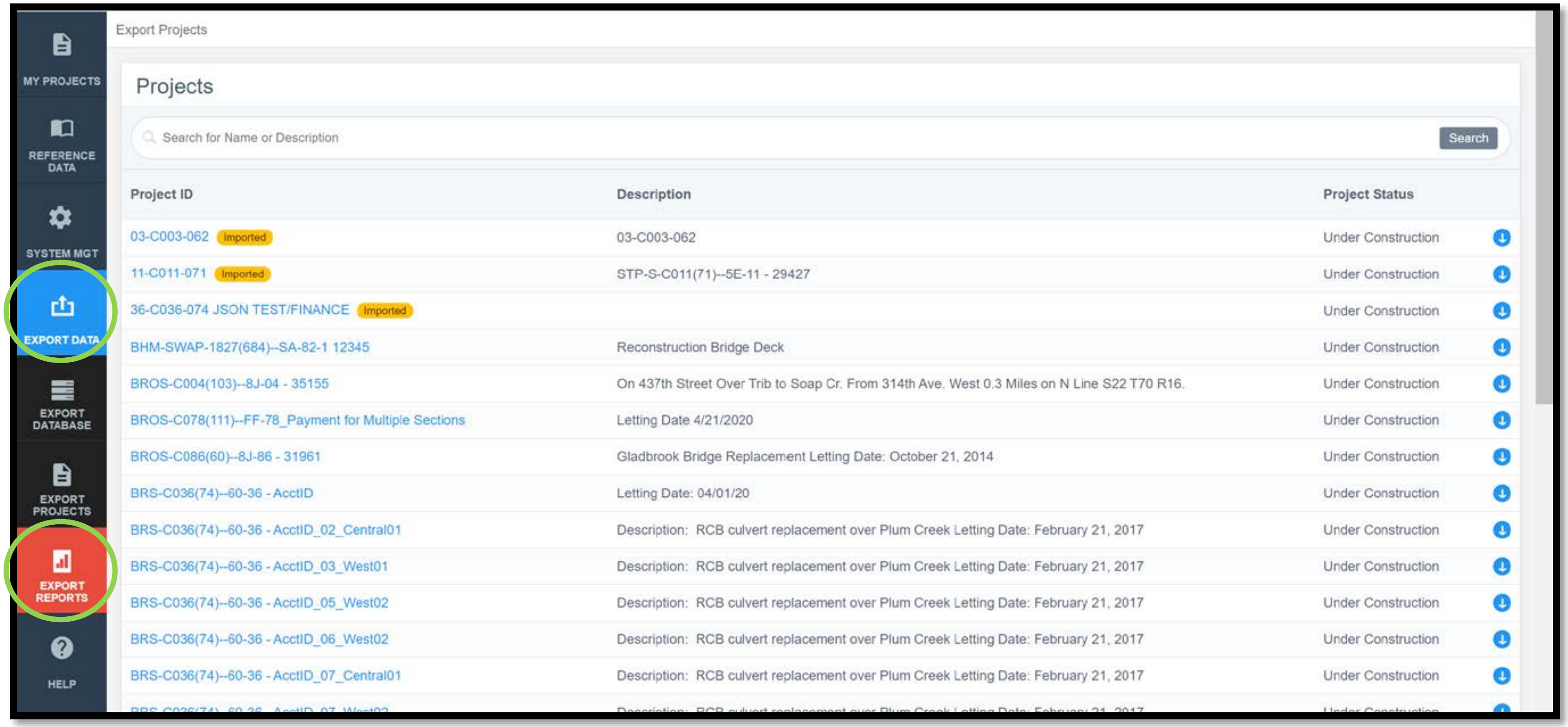
(System Administrator access level required.)

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

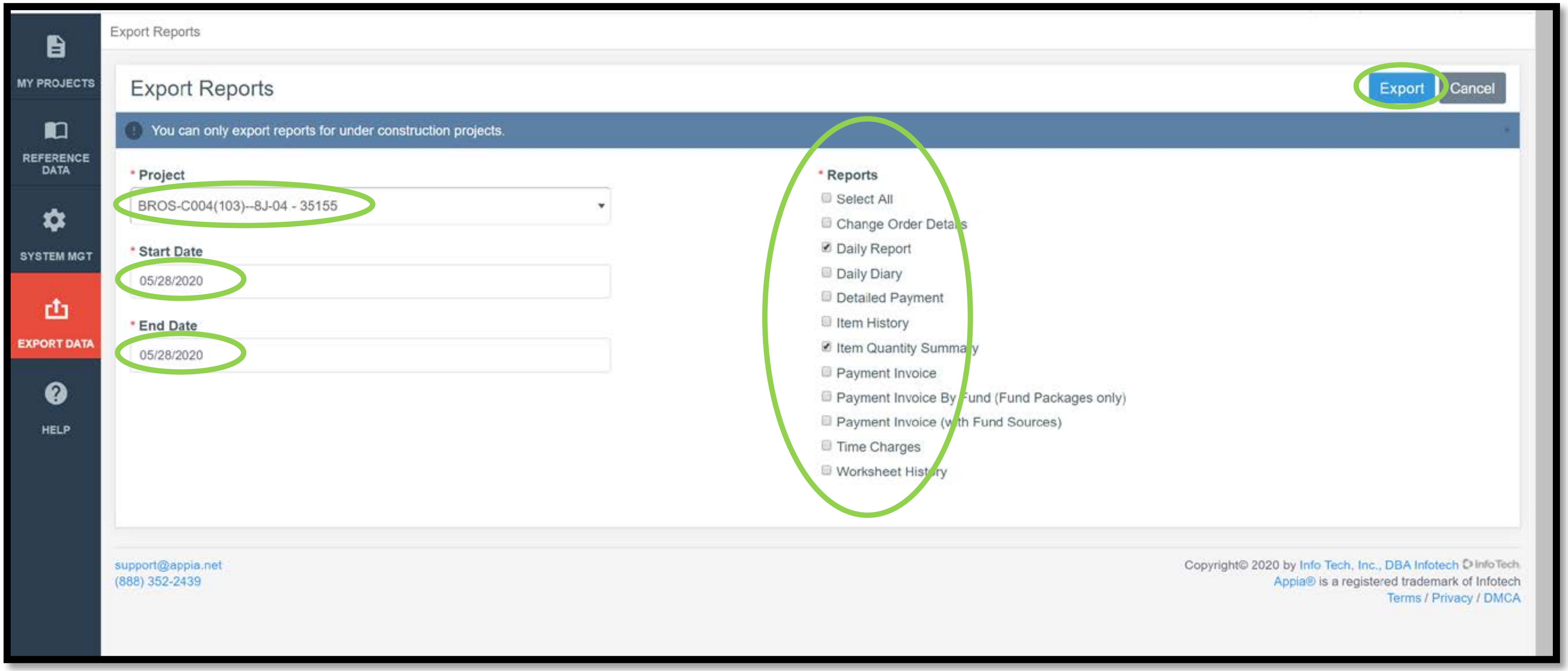
- Change Order Details
- Daily Report*
- Daily Diary
- Detailed Payment
- Item History
- Item Quantity Summary**
- Payment Invoice
- Payment Invoice by Fund (Fund Packages Only)
- Payment Invoice (with Fund Sources)
- Time Charges
- Worksheet History

*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.

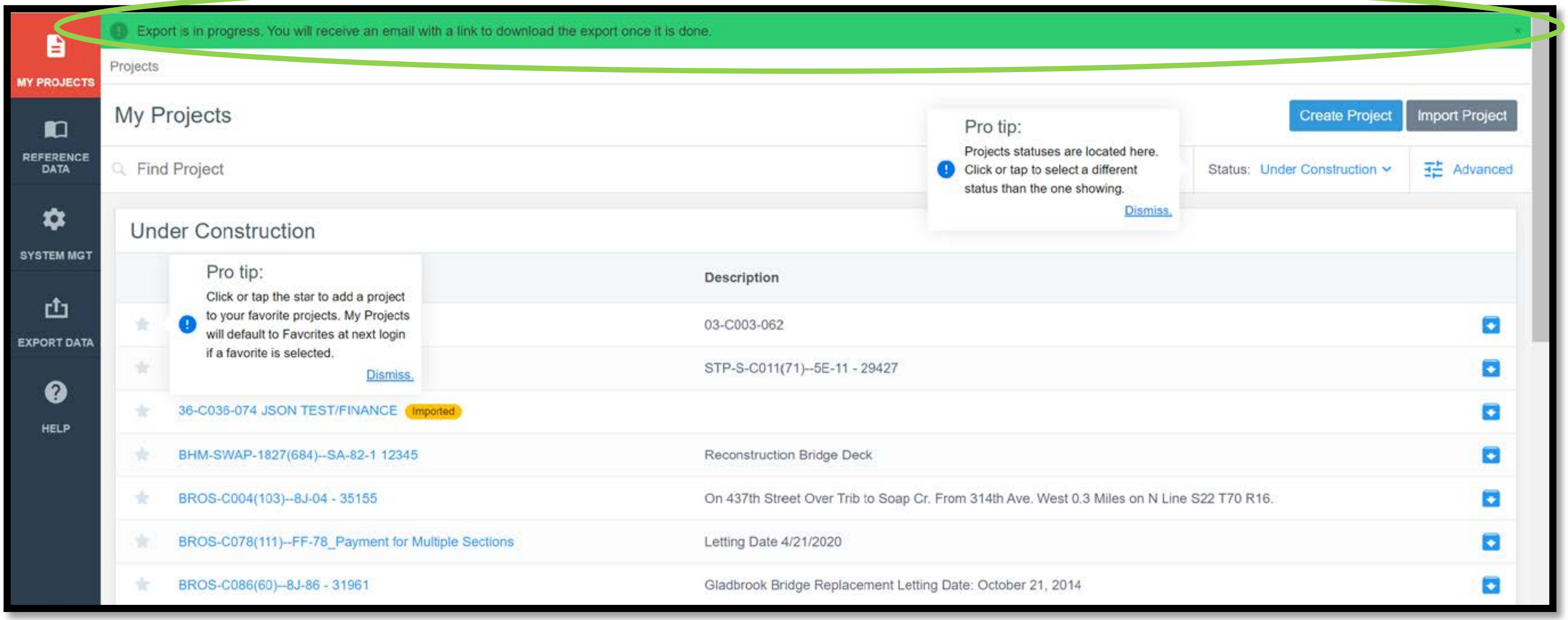
To download these reports, click on "Export Data" in the left menu on the main project listing screen. Then click on "Export Reports" in the expanded sub-menu.



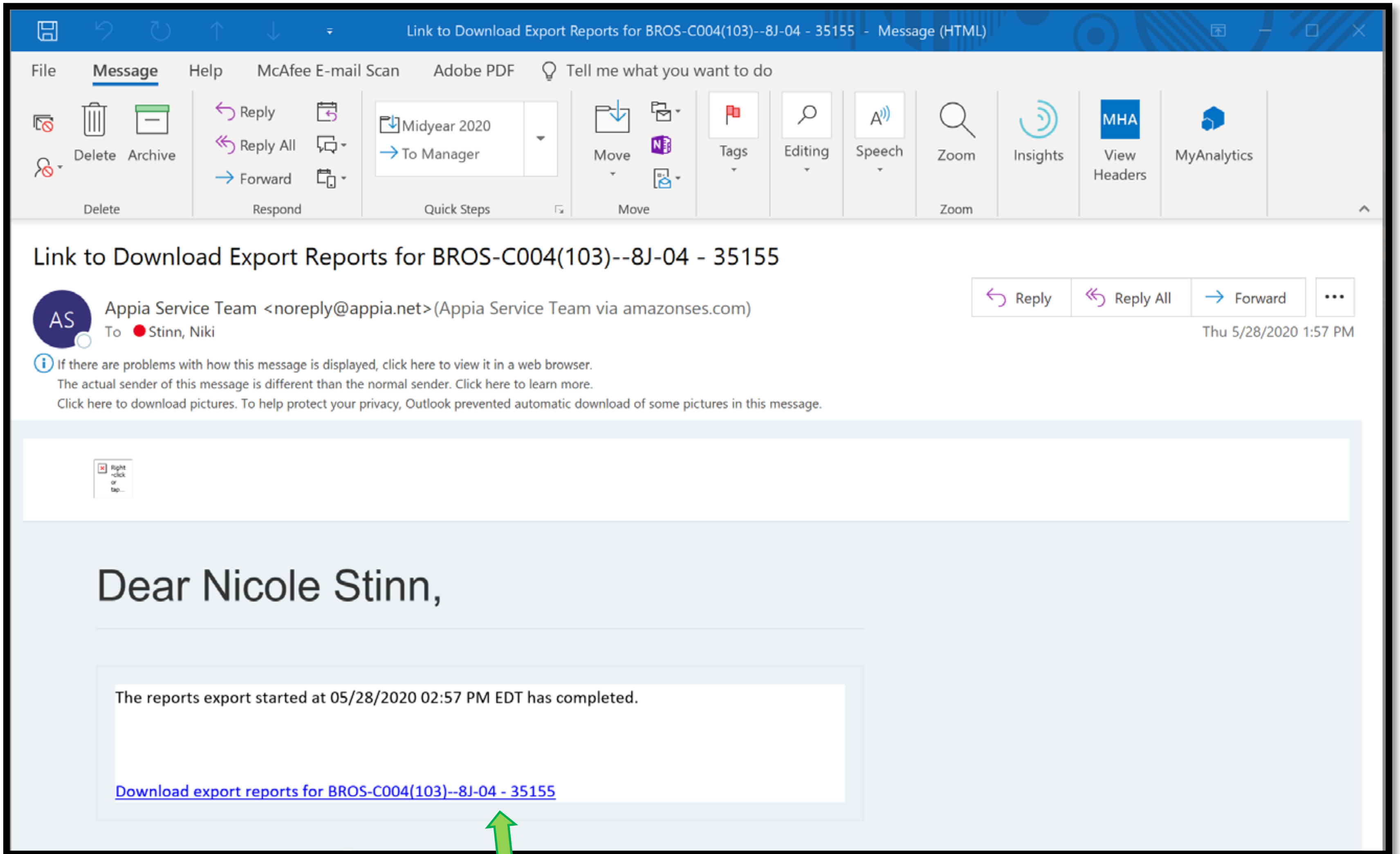
You will be brought to this “Export Reports” screen. Select the desired project from the pull-down menu and enter the desired dates in the “Start Date” and “End Date” boxes. Reports will only be generated for the date range covered between the start and end dates entered. In the “Reports” column on the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



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.

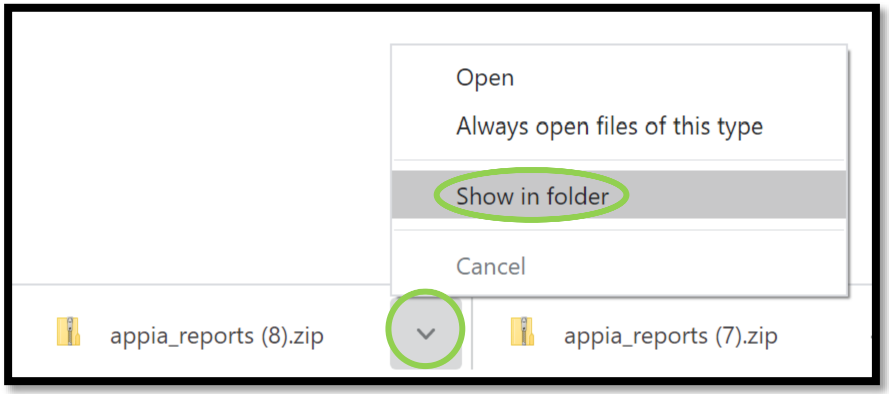


The email will look like this.

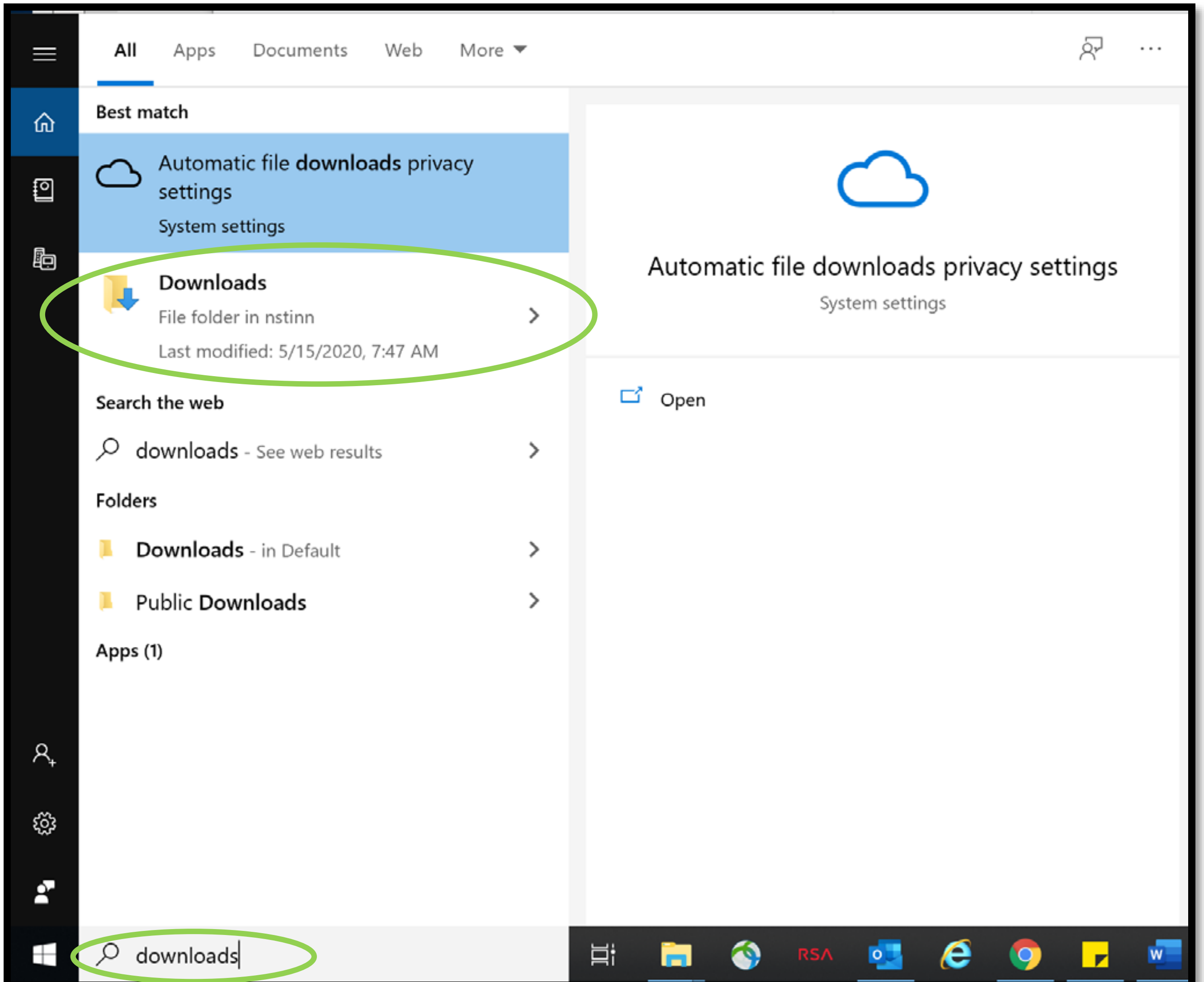


Click on the link here to download the project data.

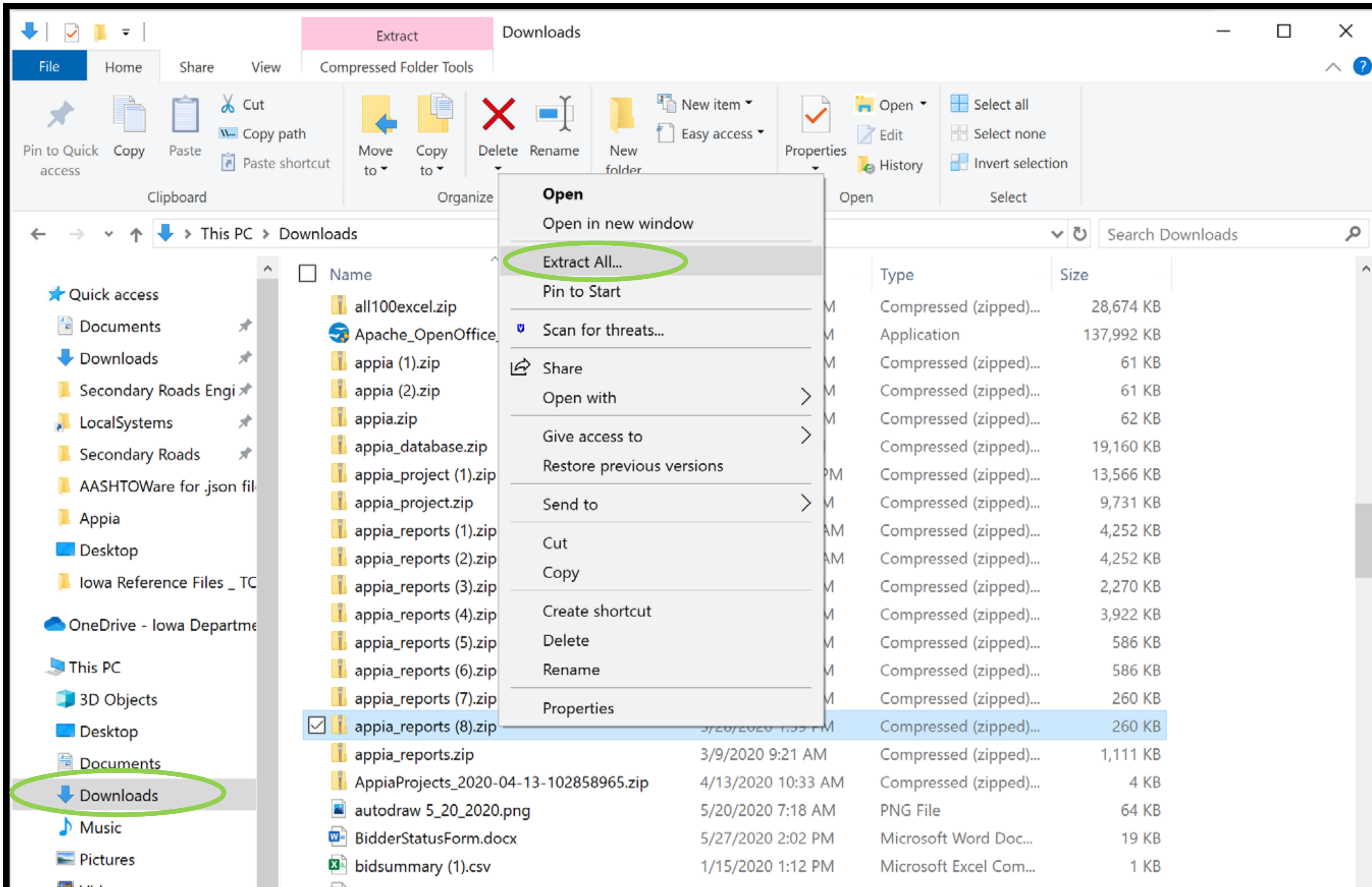
Depending on your browser, your file download may show up at the bottom like this. Click on the arrow to the right of the file name and then "Show in folder" to view the files.



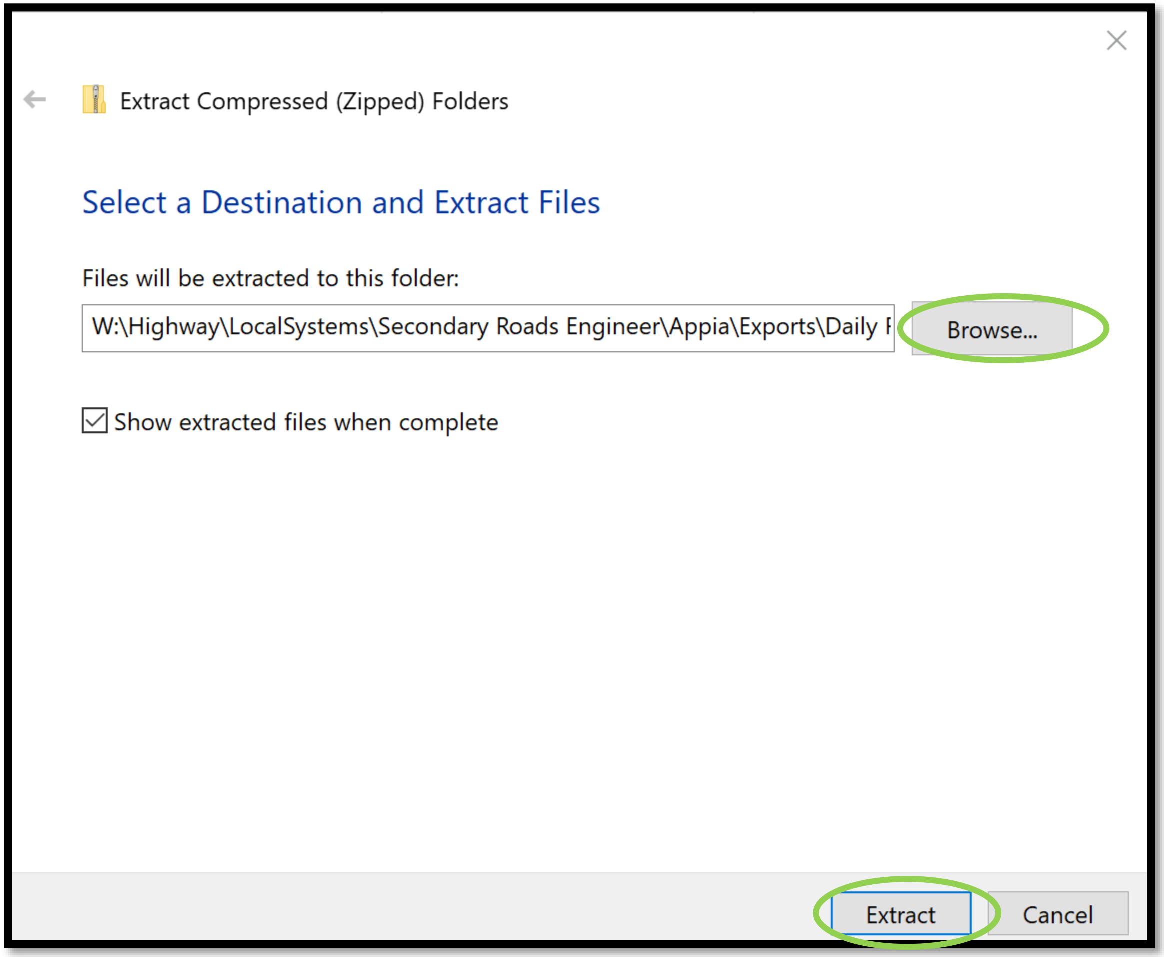
Alternately, once you have clicked on the link in the email, your zipped file can be found in the "Downloads" folder in your file explorer. The "Downloads" folder can be found by typing "downloads" in your search bar.



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



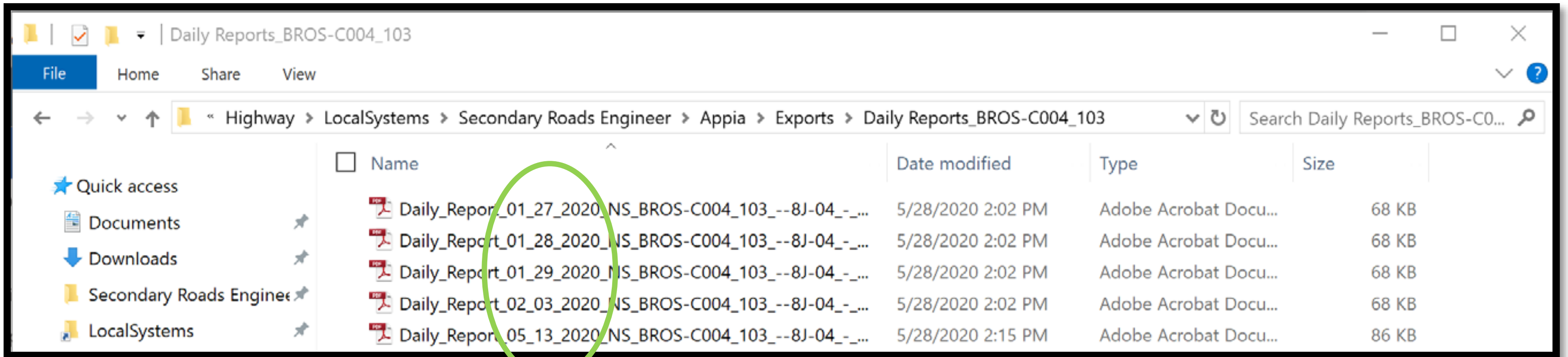
This window will pop up. Browse to find the location where you would like to save your project data.



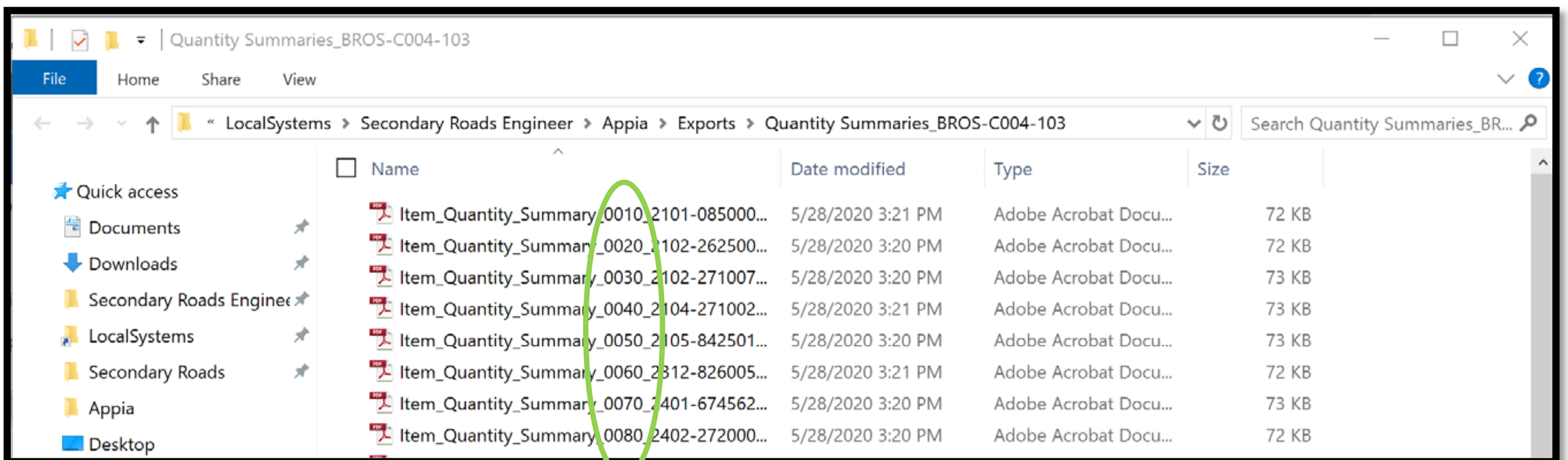
When you have selected the appropriate file in which to save your data, click “Extract”.

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: 05/28/2020
BROS-C004(103)--8J-04 - 35155 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**

Daily Report: 05/28/2020
BROS-C004(103)--8J-04 - 35155 Page 2 of 2

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.

Appia®

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 Stinn	Approved	555.556	1,444.445	155.555
05/12/2020	Nicole Stinn	Approved	888.889	888.889	711.111

Station: **From** 100 + 0.00 **To** 100 + 80.00
Location: 13' RT to 93' RT
Remarks: Southwest corner of bridge. Irregular area.

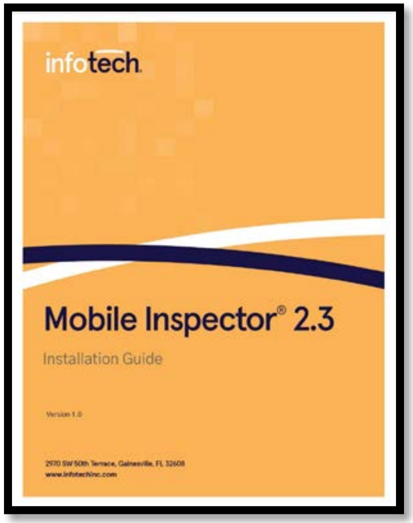
2 postings

Item Quantity Summary: 05/28/2020
BROS-C004(103)--8J-04 - 35155 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.

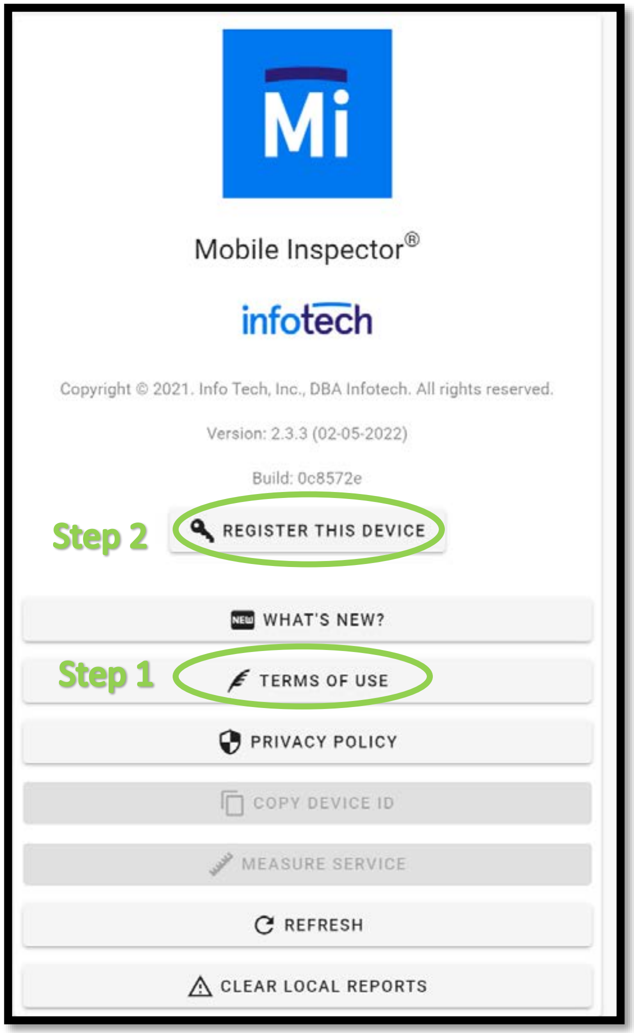
Information from the previous Mobile Inspector app can be transferred to the new Mobile Inspector 2 web-based application by following the instructions in the Installation Guide.

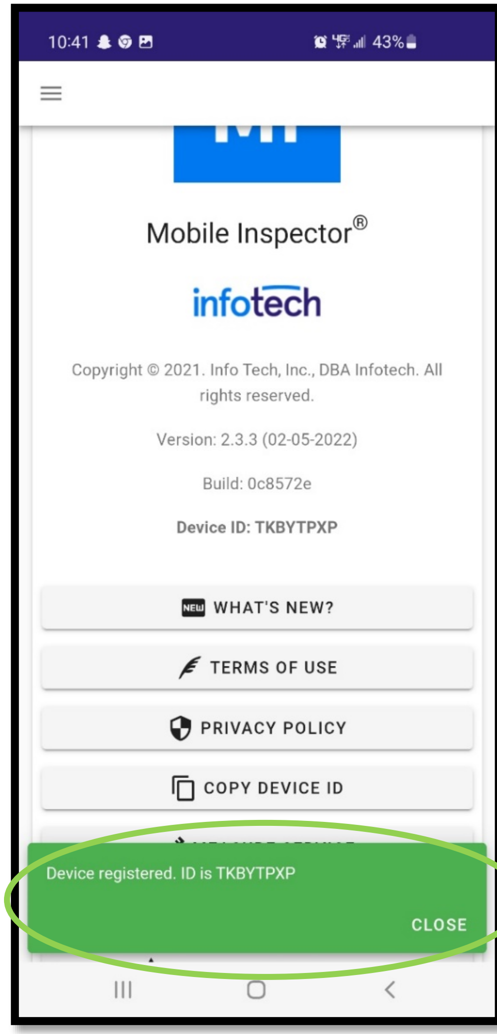
Once is application is installed, it could take up to 15 minutes for the data to sync with your account and for project information to populate.

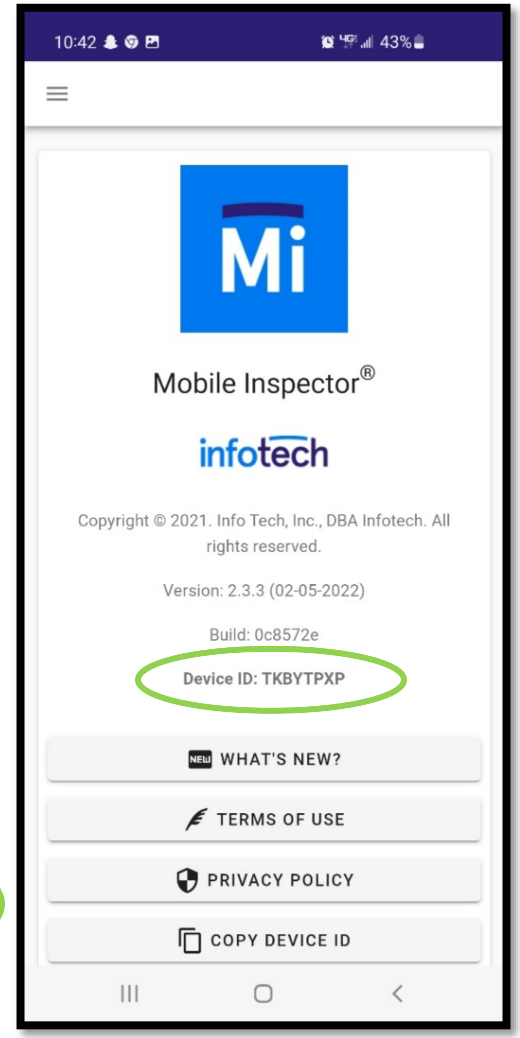
Some of its capabilities and features in the Mobile Inspector 2 application include the ability to:

- 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.

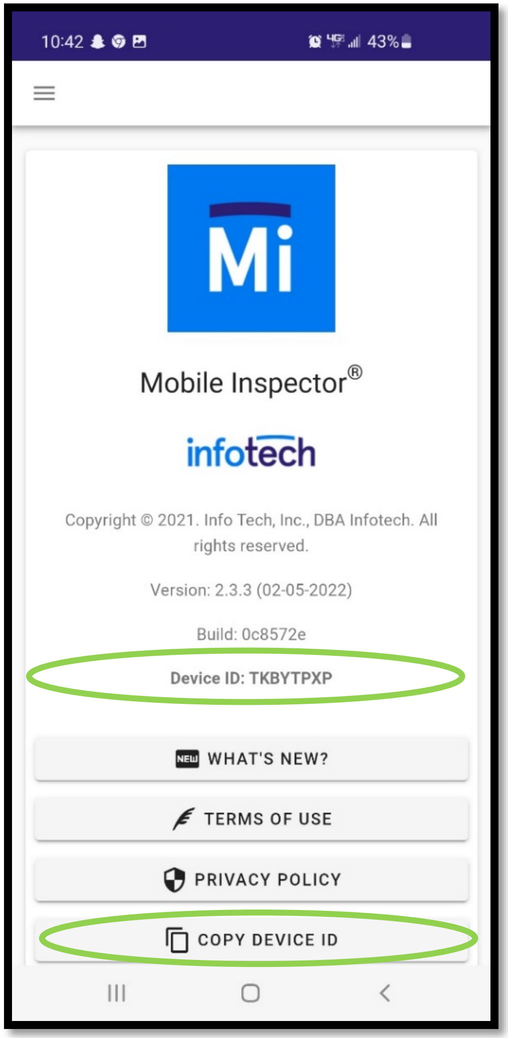
To link a mobile device using Mobile Inspector 2 app to a user's account, first, download the app according to the instruction in the Installation Guide. Once the application is downloaded and has been docked on your device's screen, register the device.



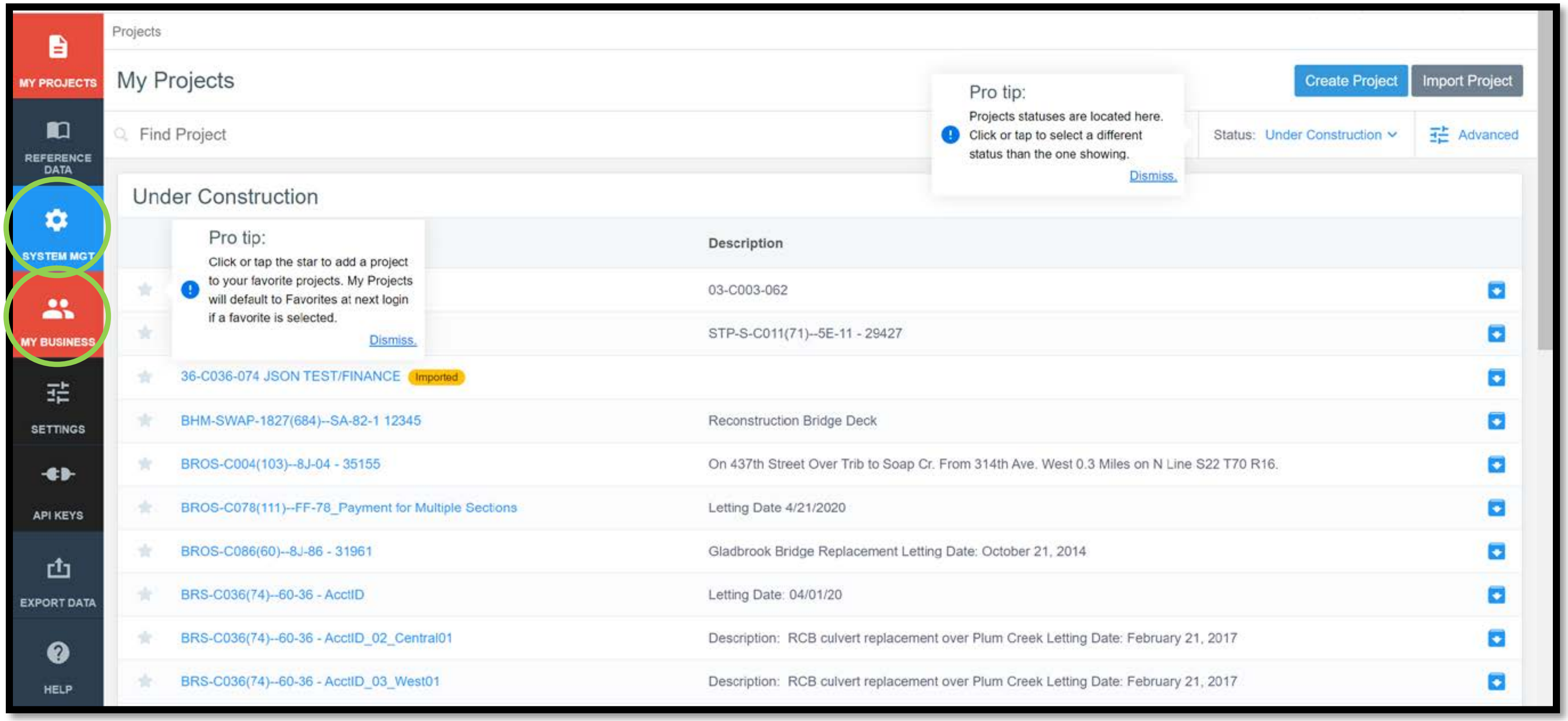




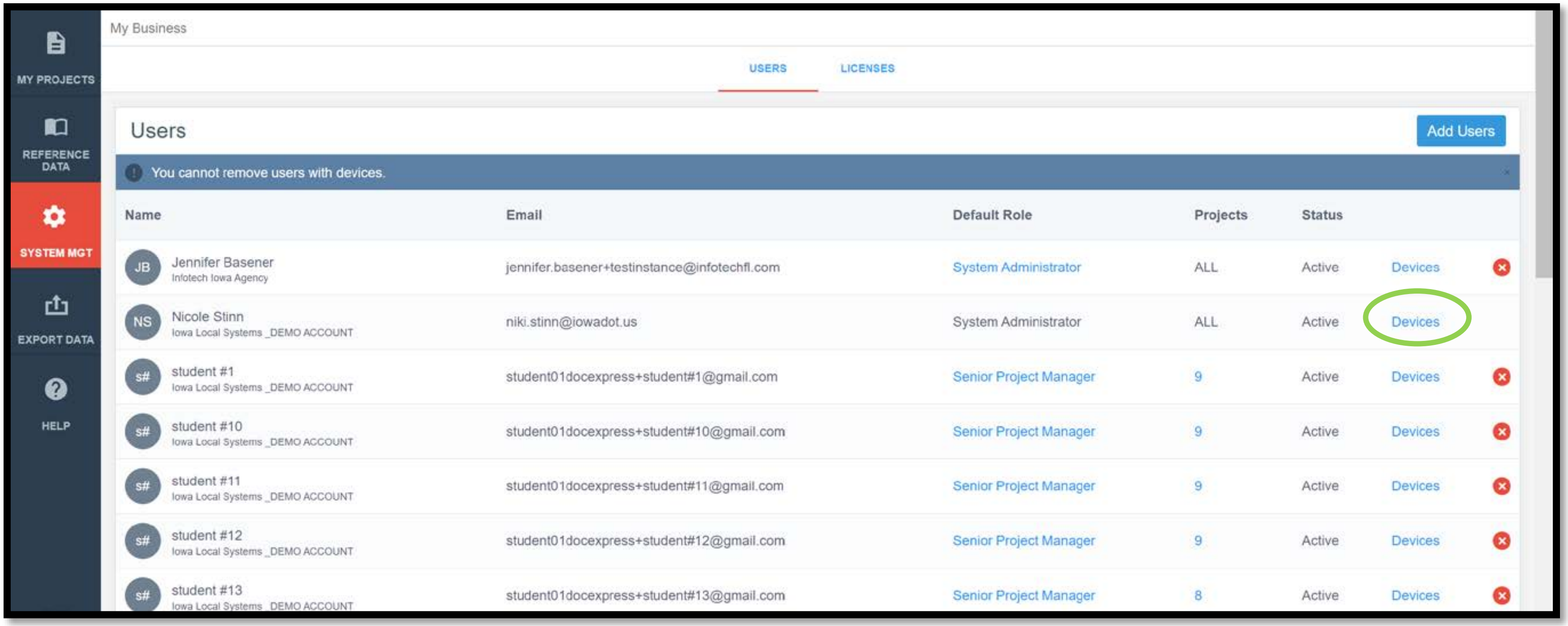
When the app has finished installing on the mobile device, open it. The main screen looks like this. Take a screenshot of the "Device ID" or write it down. Alternatively, use the "Copy Device ID" button and paste the ID into an email or text. This is the ID that will need to be entered by your agency's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



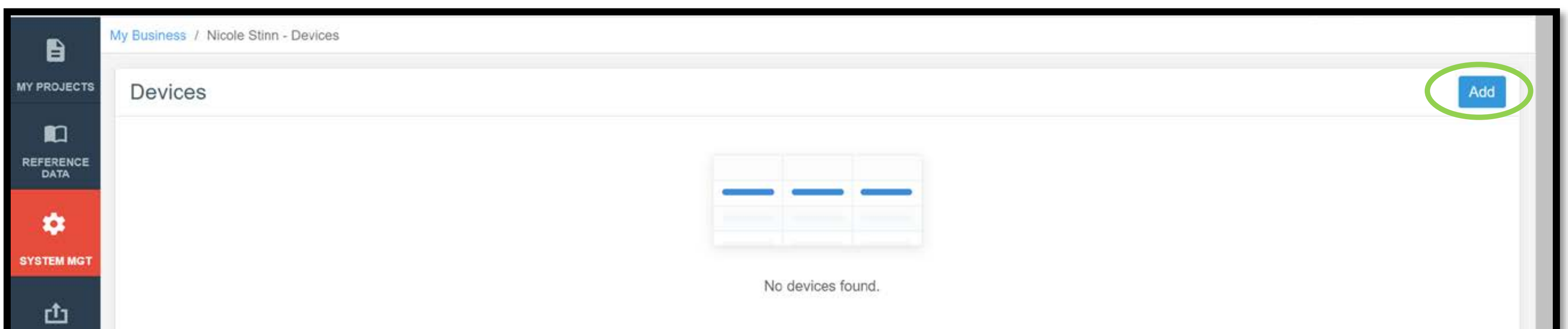
Next, click on “System Management” in the left menu on the main project listing screen. Then click on “My Business” in the expanded sub-menu.



Find the desired user and click on the blue "Devices" link on the right side of the line listing the user's name.

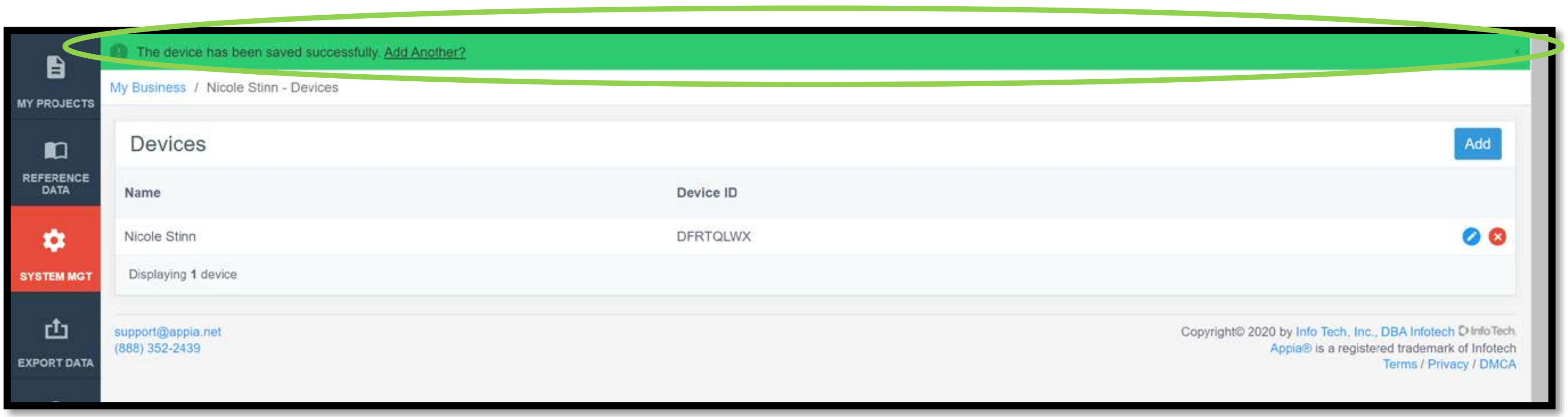


You will be taken to this screen. Click on the "Add" button in the upper, right corner.



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".

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.



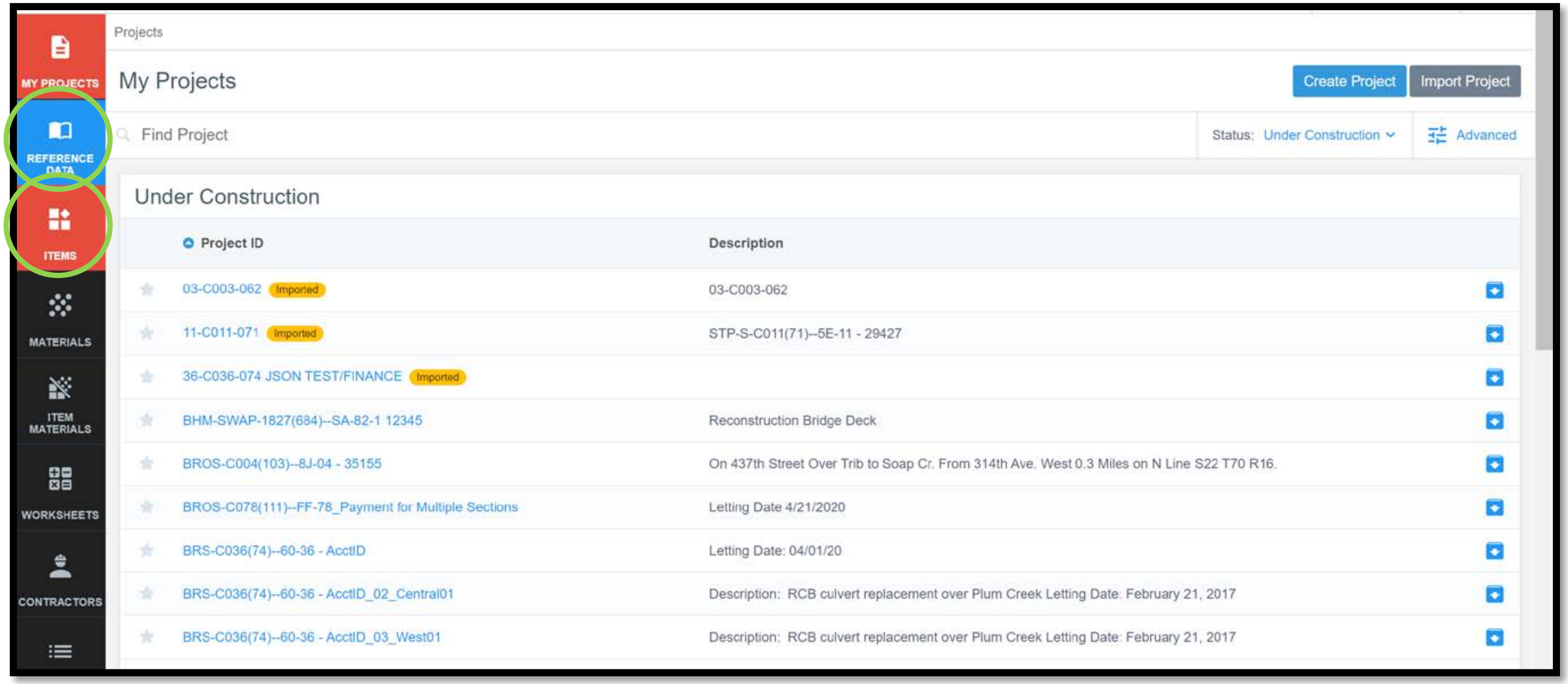
It takes about 10-15 minutes for the app on the mobile device to sync up with the Appia program.

17 - Reference Data: Bid Items

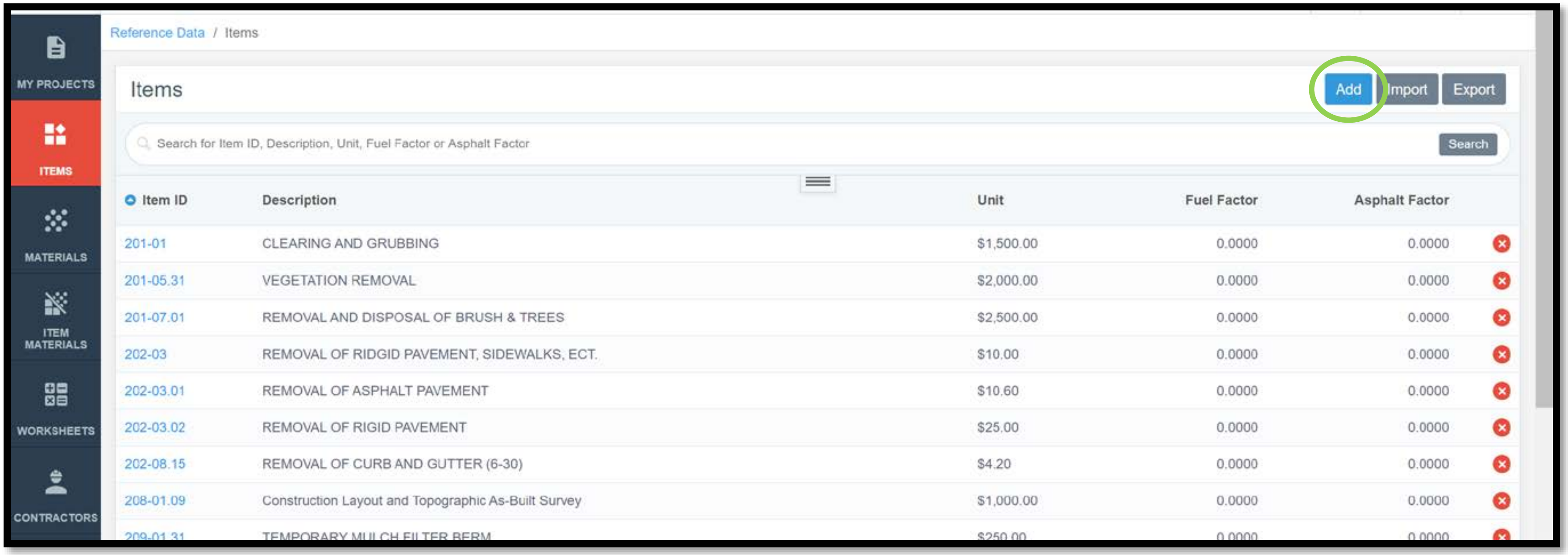
(System Administrator access level required.)

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.



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



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.

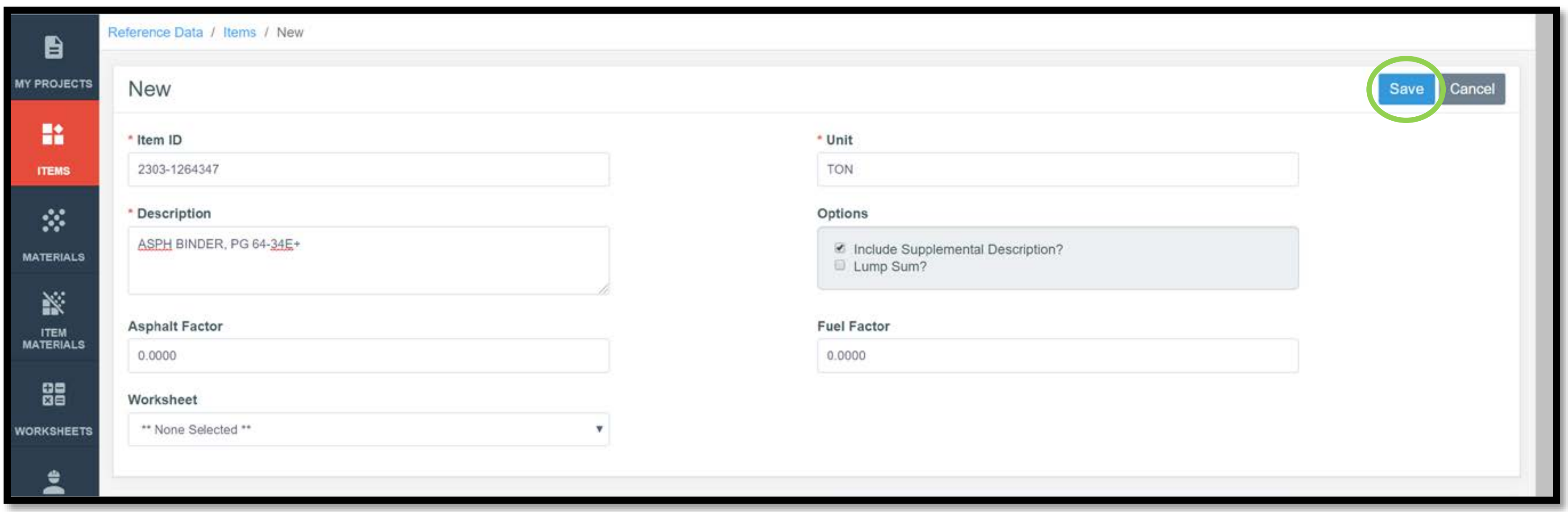
"Asphalt Factor" and "Fuel Factor" are generally left at 0.000 unless you have a specific reason for doing otherwise.

"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.

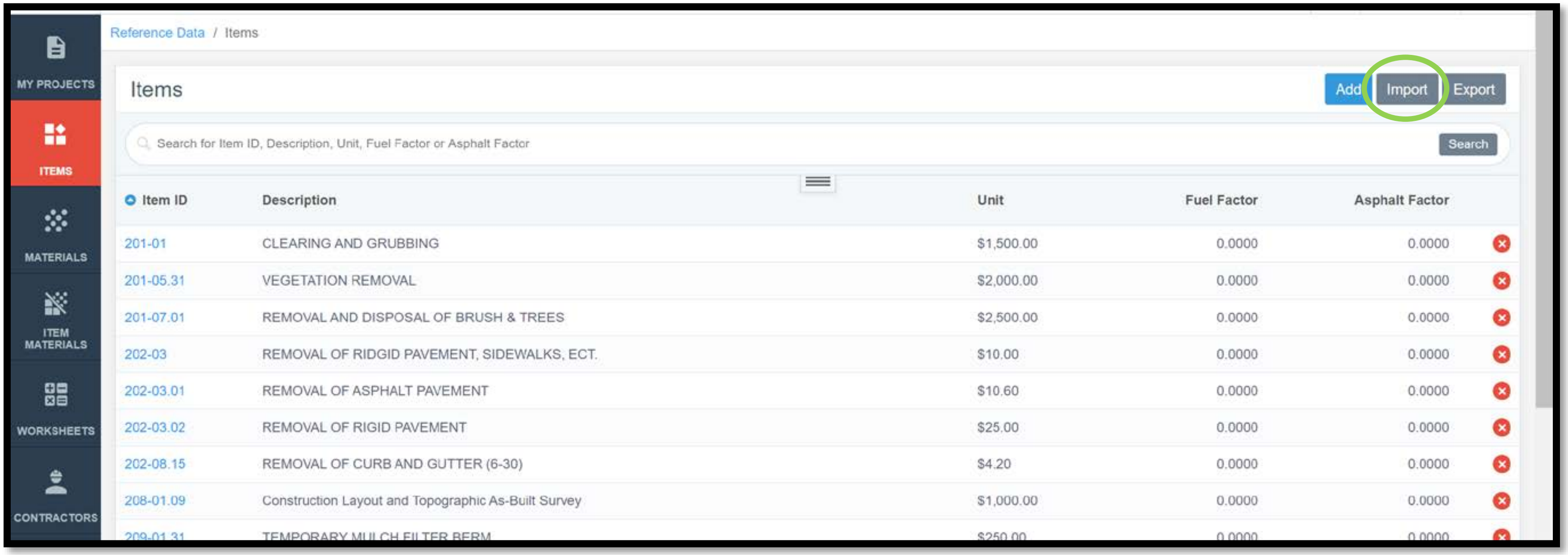
"Include Supplemental Description" should be checked if the item has a supplement description (like a 2599 item or items where sizes are specified in the description).

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

Click "Save" when finished entering the necessary information.



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

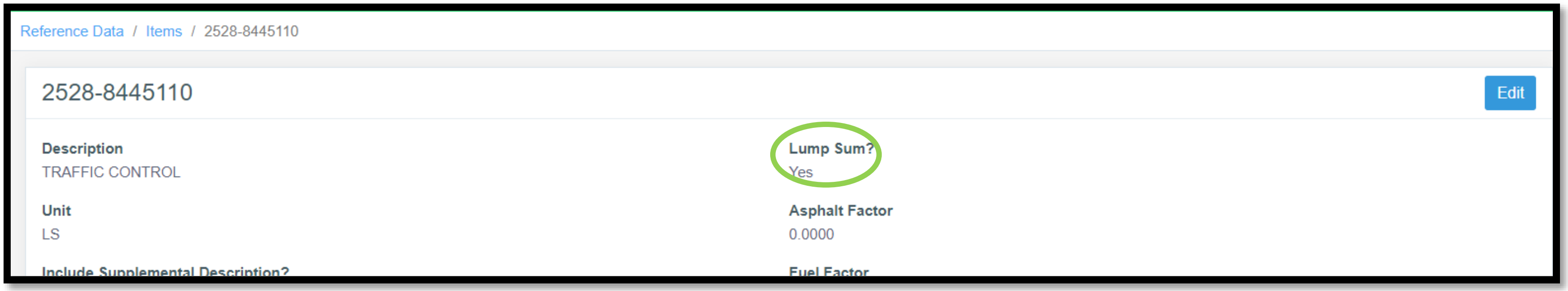


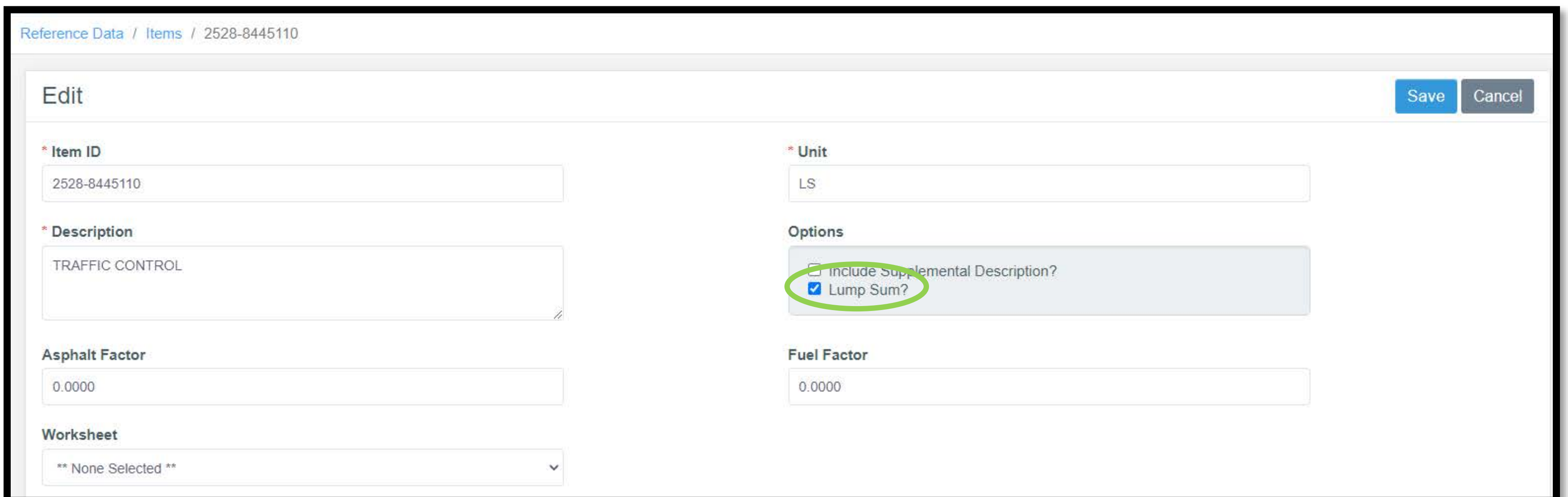
Click on the “Choose File” button to browse for the appropriate file to import from your computer. Once the file is selected, click “Upload”.

B. Removing “Lump Sum” Designations

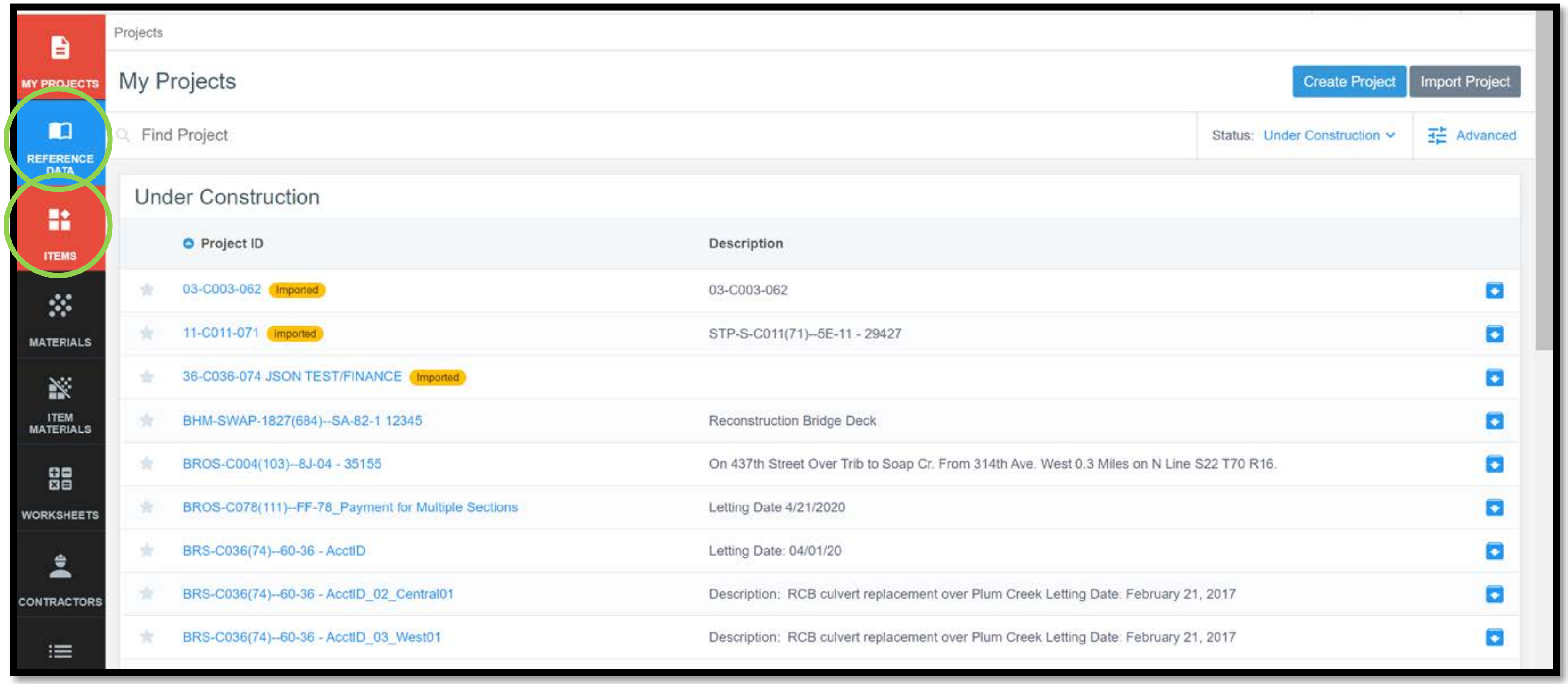
Because of the way the Iowa DOT Reference Data was originally set up, most Lump Sum items will show “Lump Sum” as “Yes” (non-editing screen) and have the “Lump Sum” box checked (editing screen) as shown below. This designation interferes with some of the payment and close-out processes for Iowa DOT-administered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

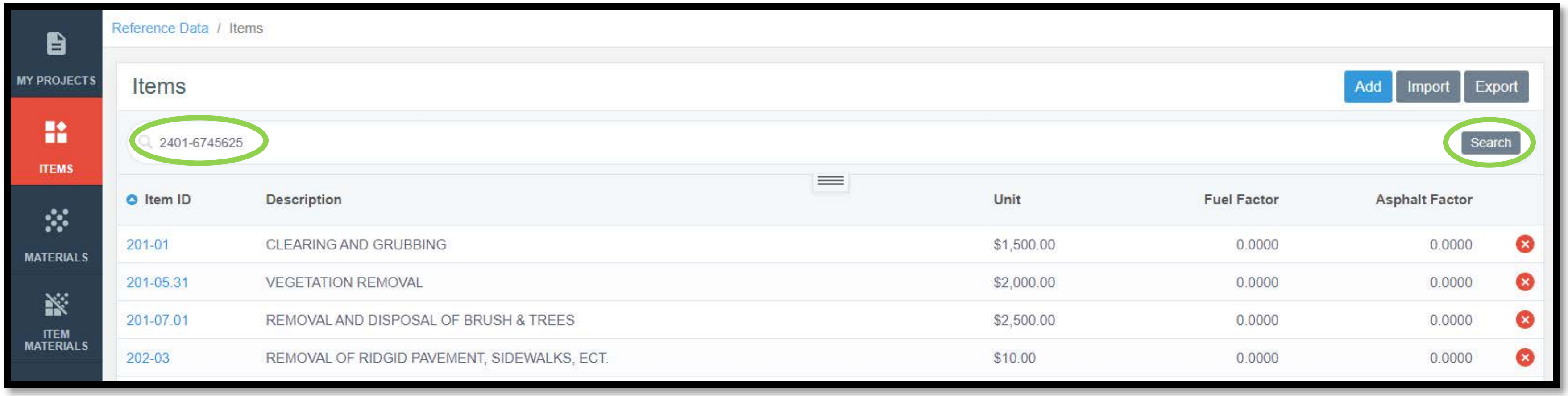




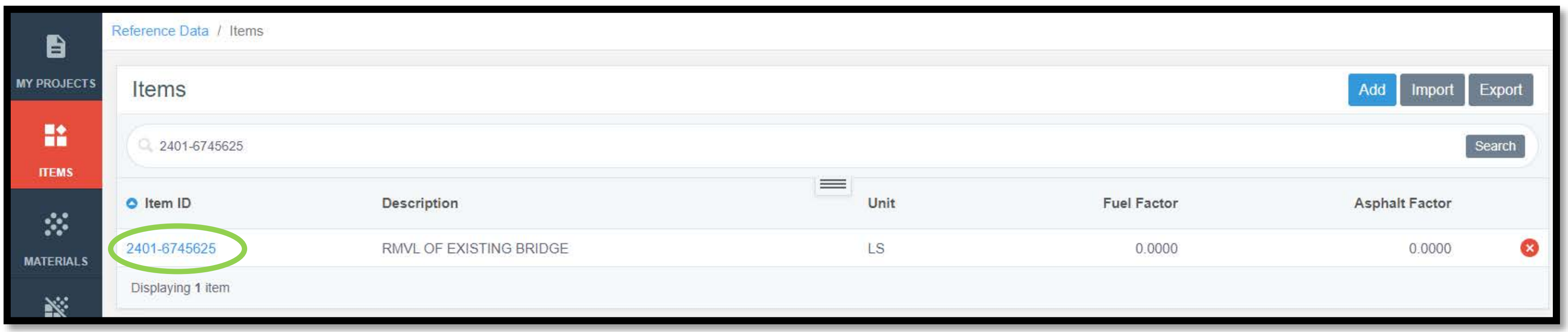
To remove the "Lump Sum" designation from an item, click on the "Reference Data" button in the left menu bar. Then click on "Items" in the expanded menu.



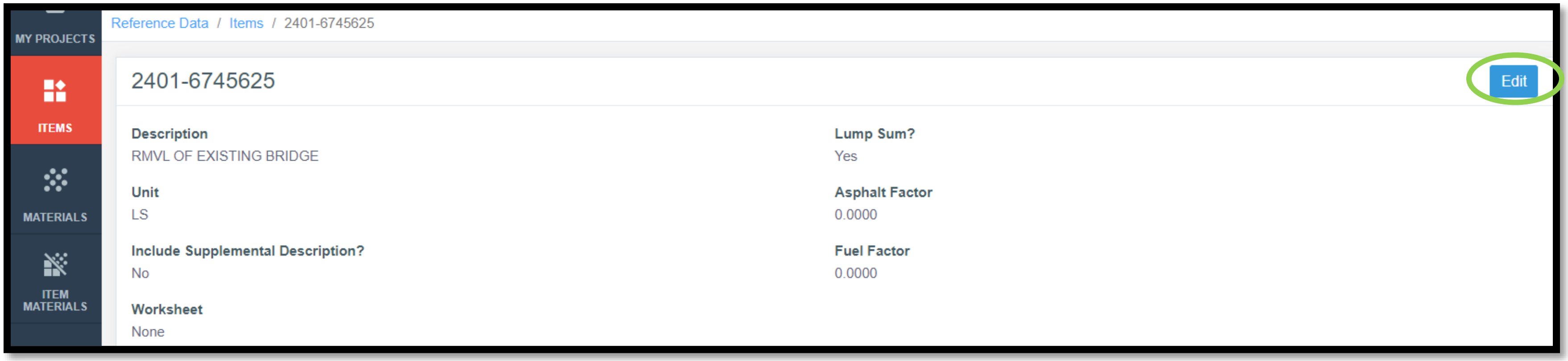
In the Items screen that appears, search for the desired Lump Sum item in the search bar at the top. The easiest way to find the item is to search by item ID. Once you've typed in your item ID or other item identifier, hit Enter or click the gray Search button on the right end of the search line.



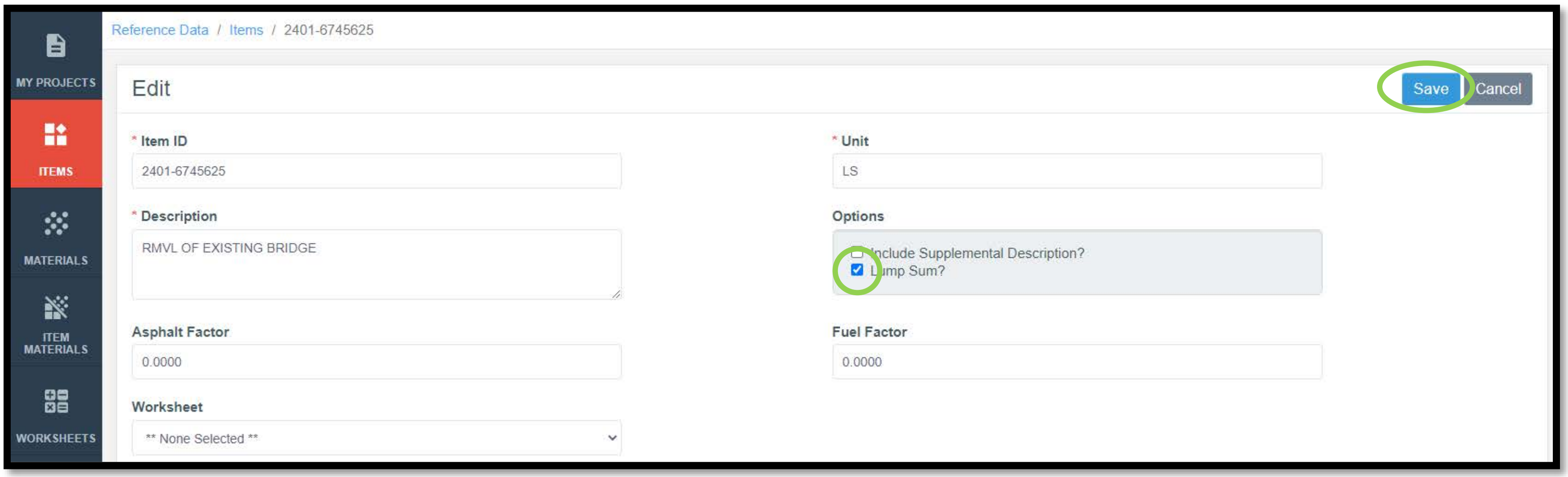
The search should return a screen with your item. Click on the blue item number on the left end of the line to open the item.



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



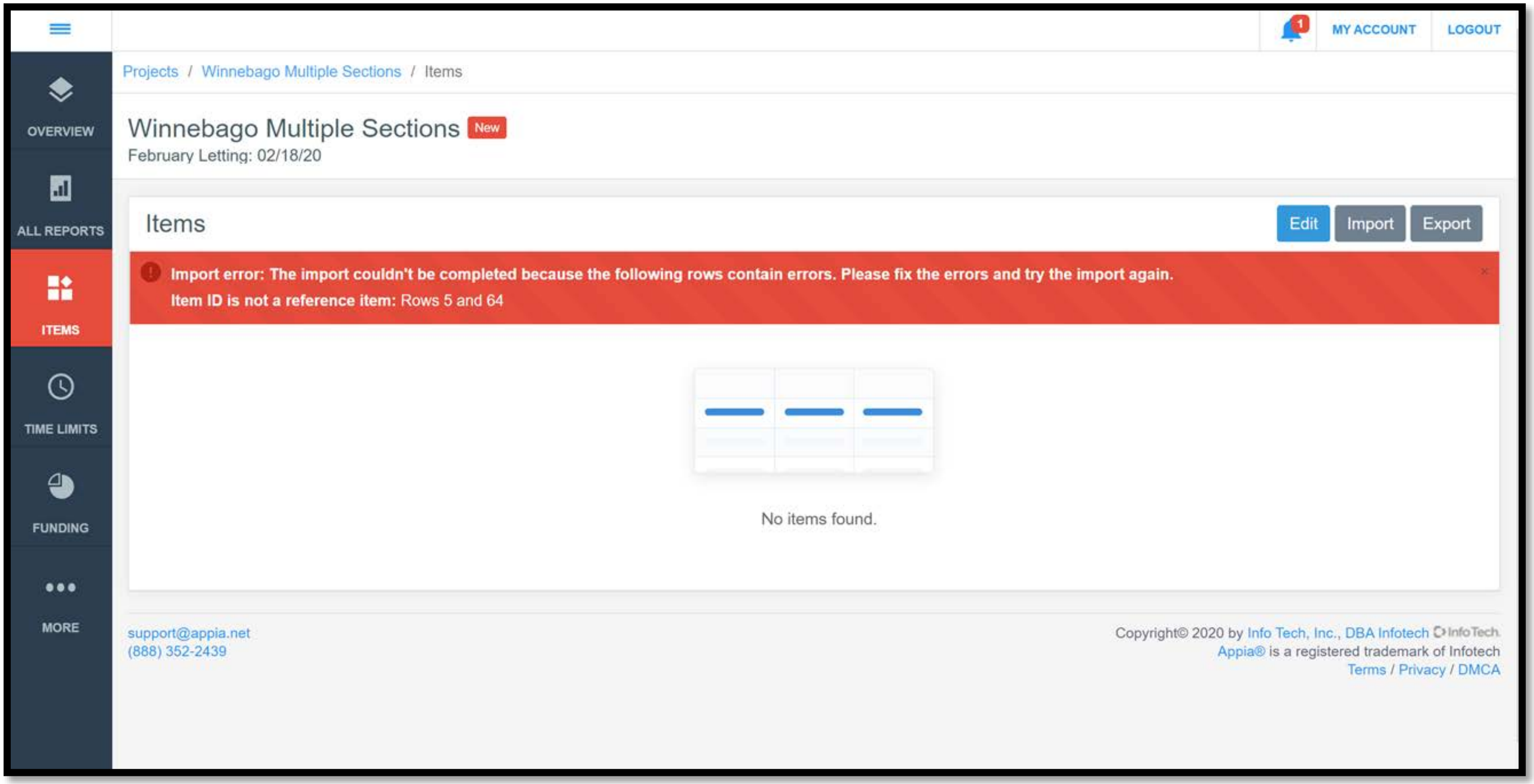
Now the editing screen should be open. There will be a check box to the right of "Lump Sum?" containing a check mark highlighted in blue. Remove the check mark by clicking on it. Then click the blue "Save" button in the upper right corner.



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

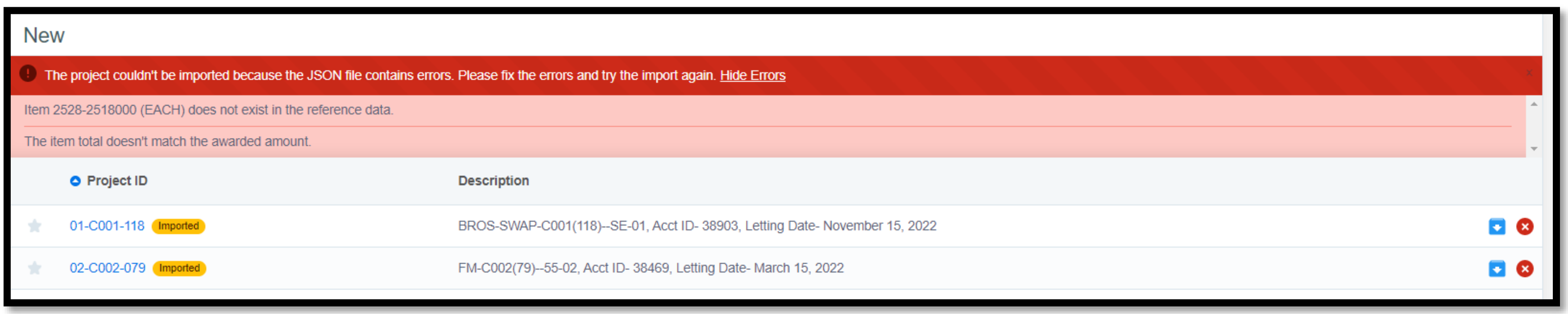
If you try importing bid items and get this error message, it means that one or more of the bid items are not in your reference data library. You will need to add them. The error message tells you what rows of the .csv file are not being imported. This row count includes the header line. Look at your .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.



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".

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.



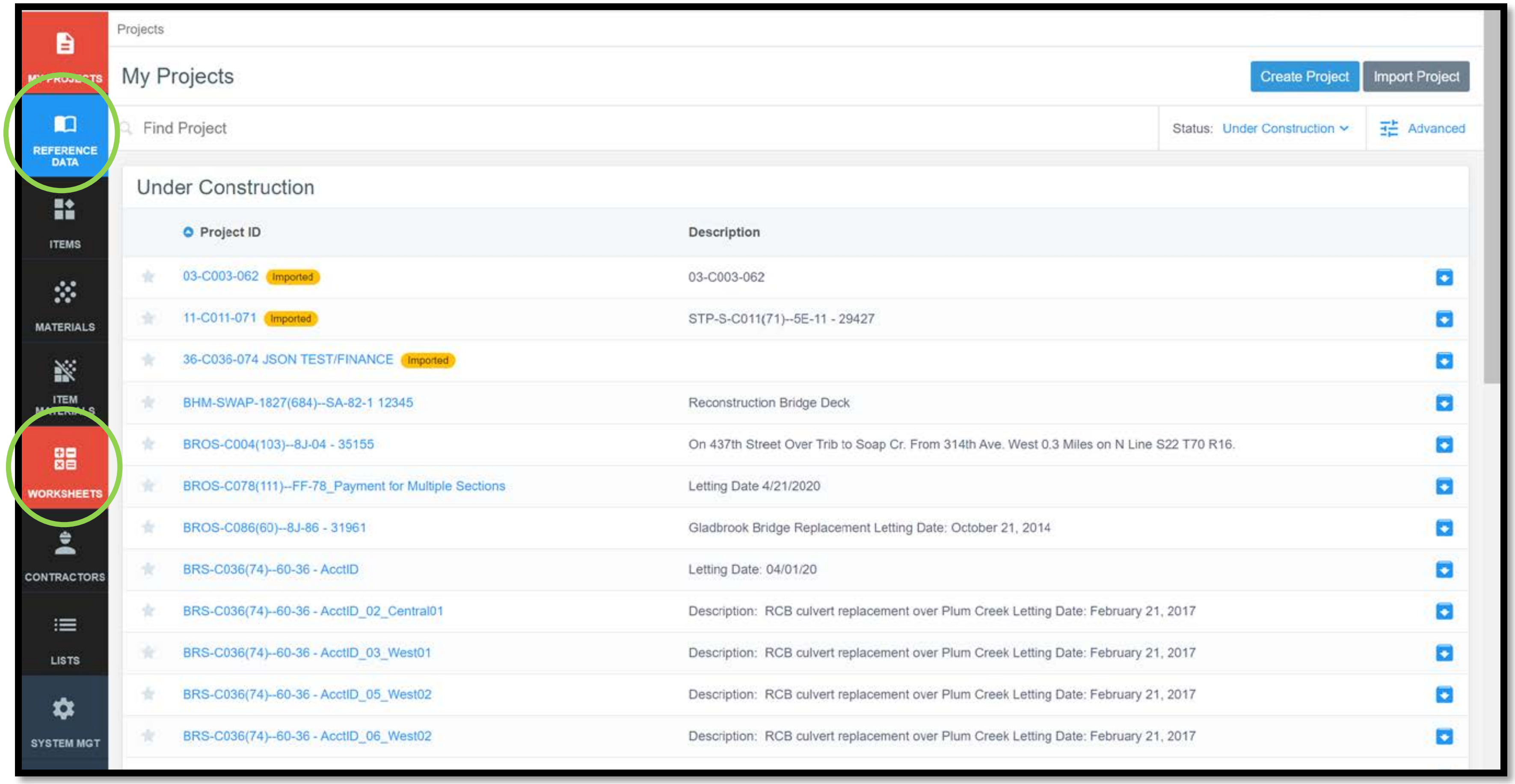
Note: The error saying, "The item total doesn't match the awarded amount." will automatically resolve once all missing bid items are entered into the reference data.

18 - Reference Data: Worksheets

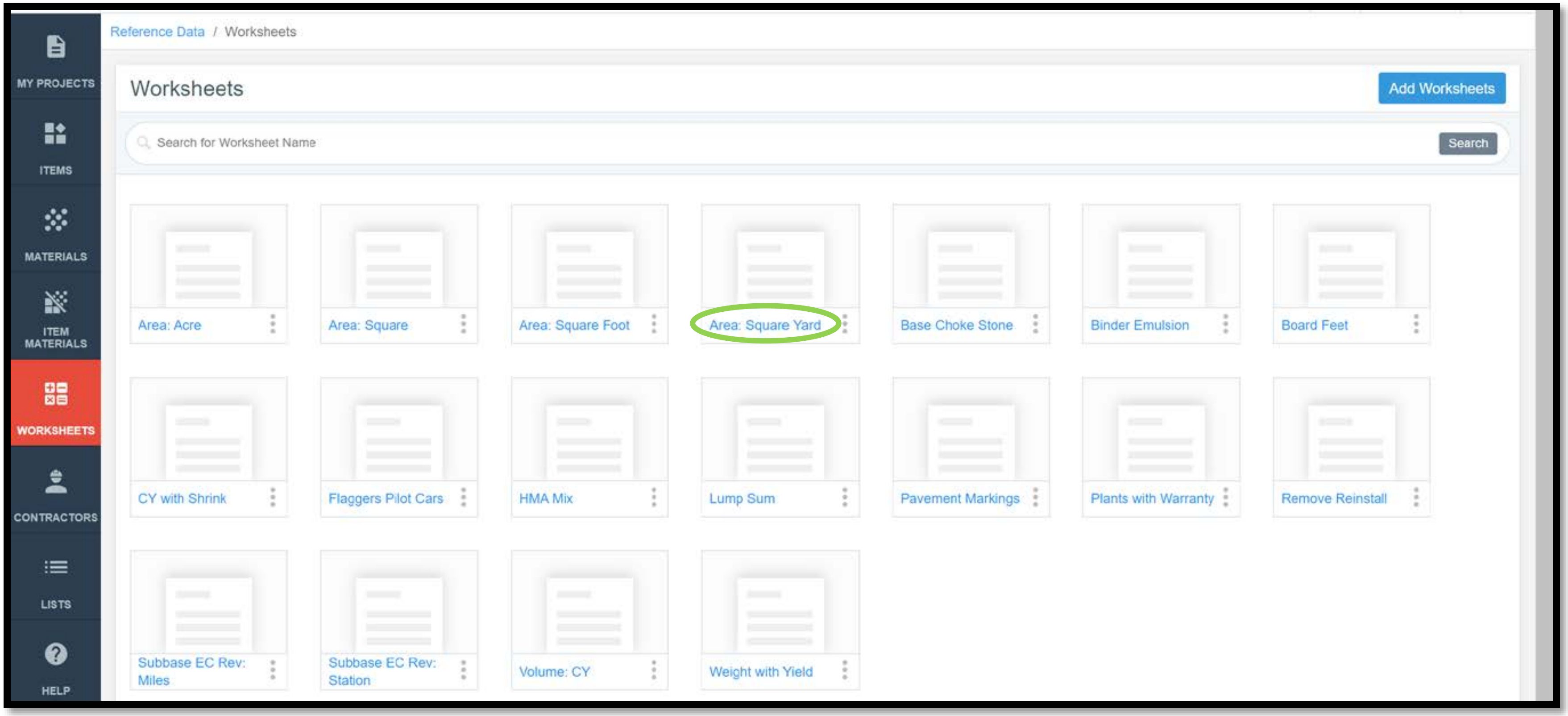
(System Administrator access level required.)

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.



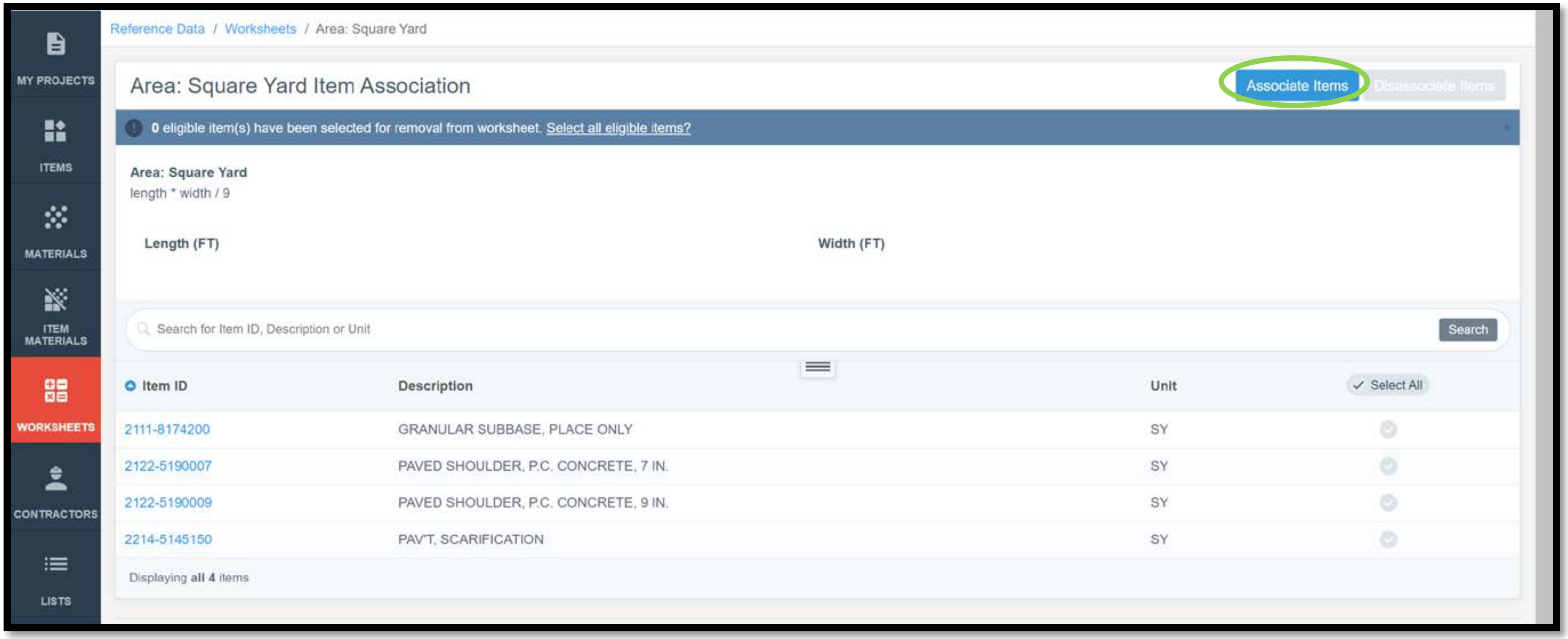
You will be brought to the following screen. These are the worksheets currently present for use in Appia. In order for a worksheet to be used for quantity calculations in item postings, it must first be associated with a bid item. To see what items are currently associated with any given worksheet, click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

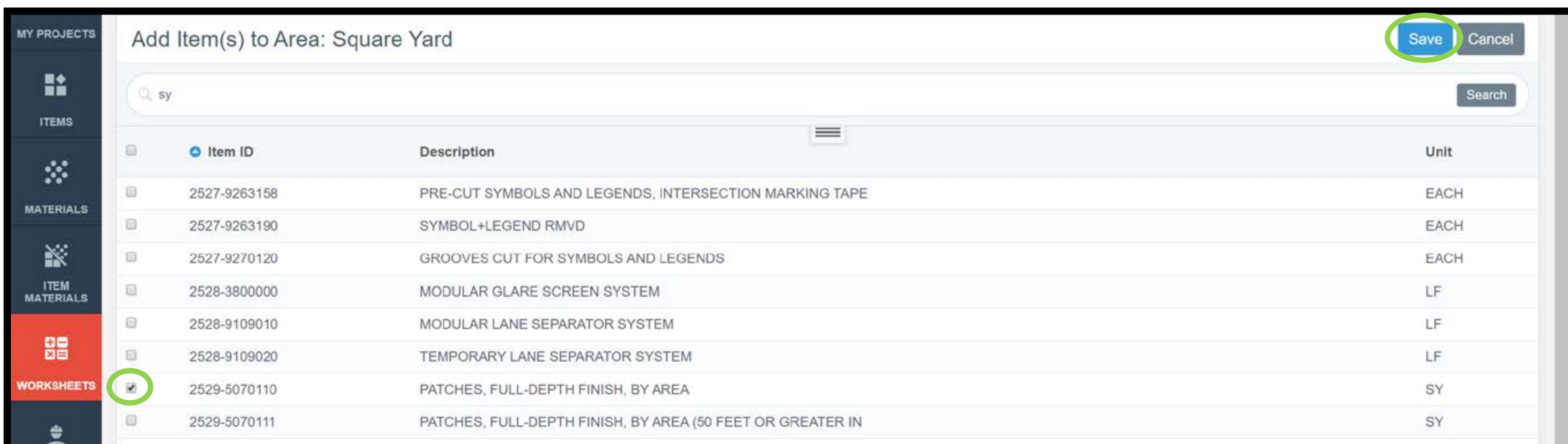
A screen will appear listing all of the items in the reference data that are currently associated with the worksheet.

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

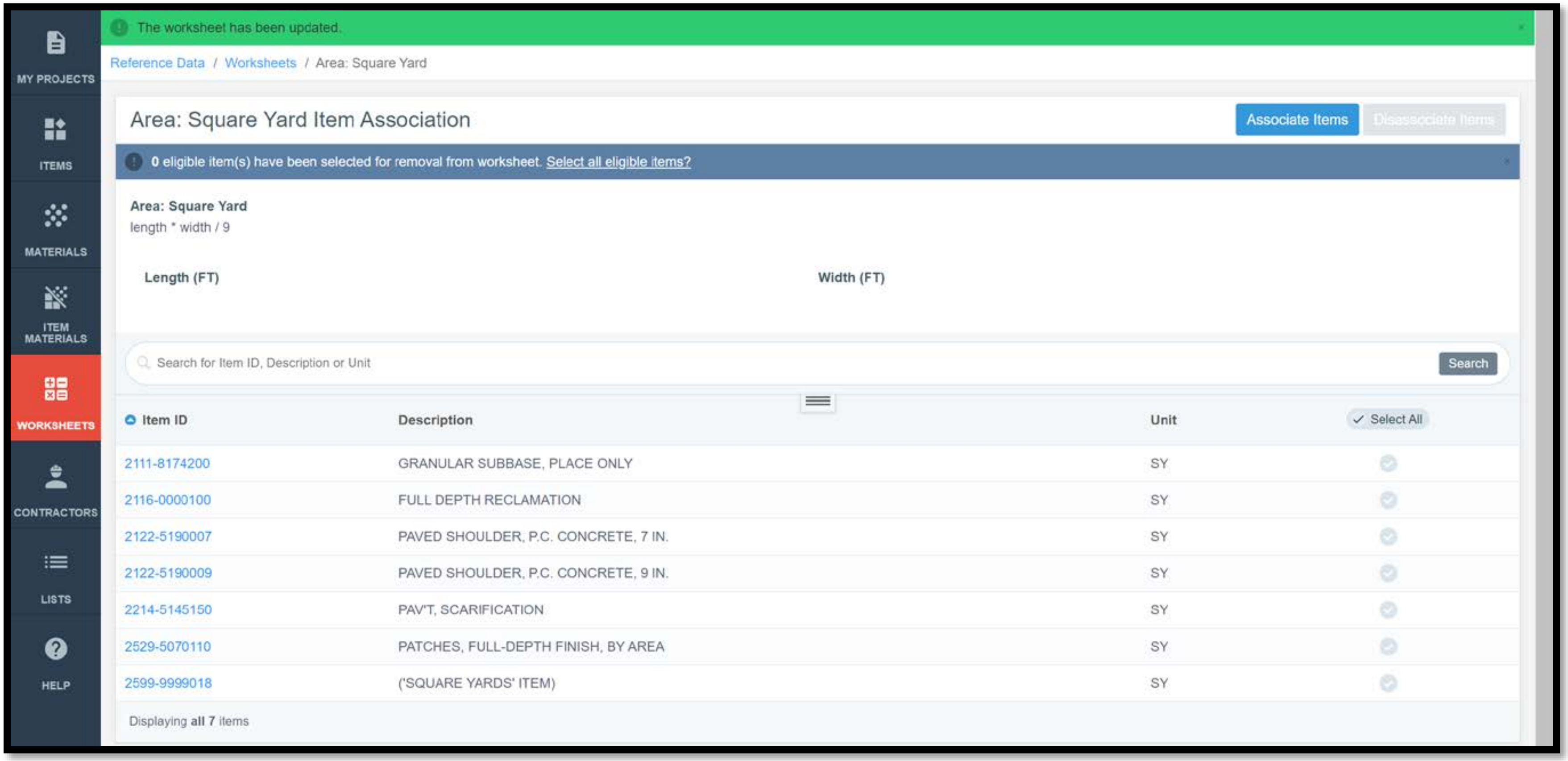


If you are seeking to only associate the worksheet to one particular bid item, enter the name of the bid item in the search bar and click “Search”. (Keep the name as generic as possible to give the best chance at finding the item.) If you are seeking to associate the worksheet with all items having units 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.)

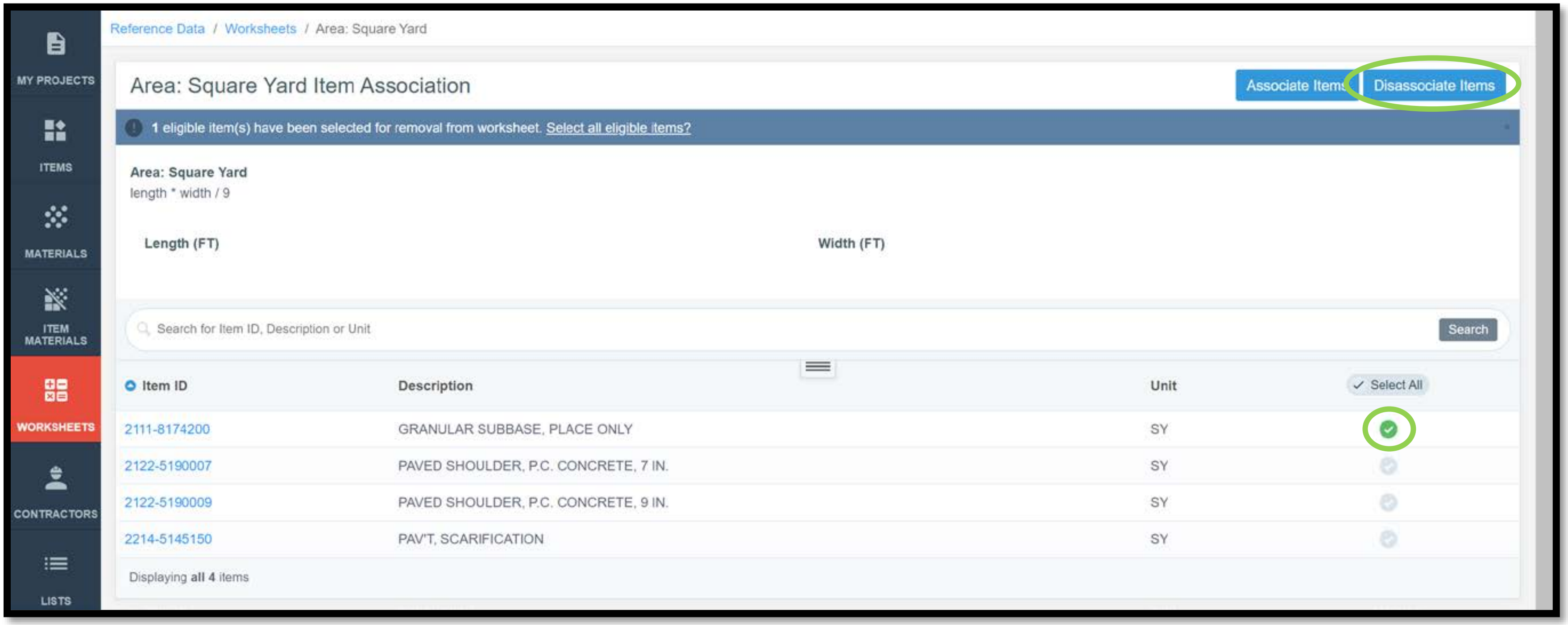
Click on the box to the left of the item’s line to select the desired items or on the box in the header at the top of the column to select all items. Click “Save” in the upper, right corner when all desired items have been selected.



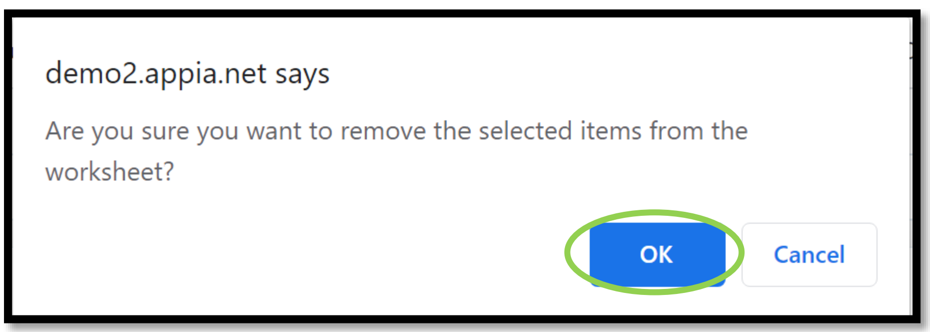
If the association was successful, a green ribbon will appear at the top of the screen, and the item will be shown in the list of associated items.



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.



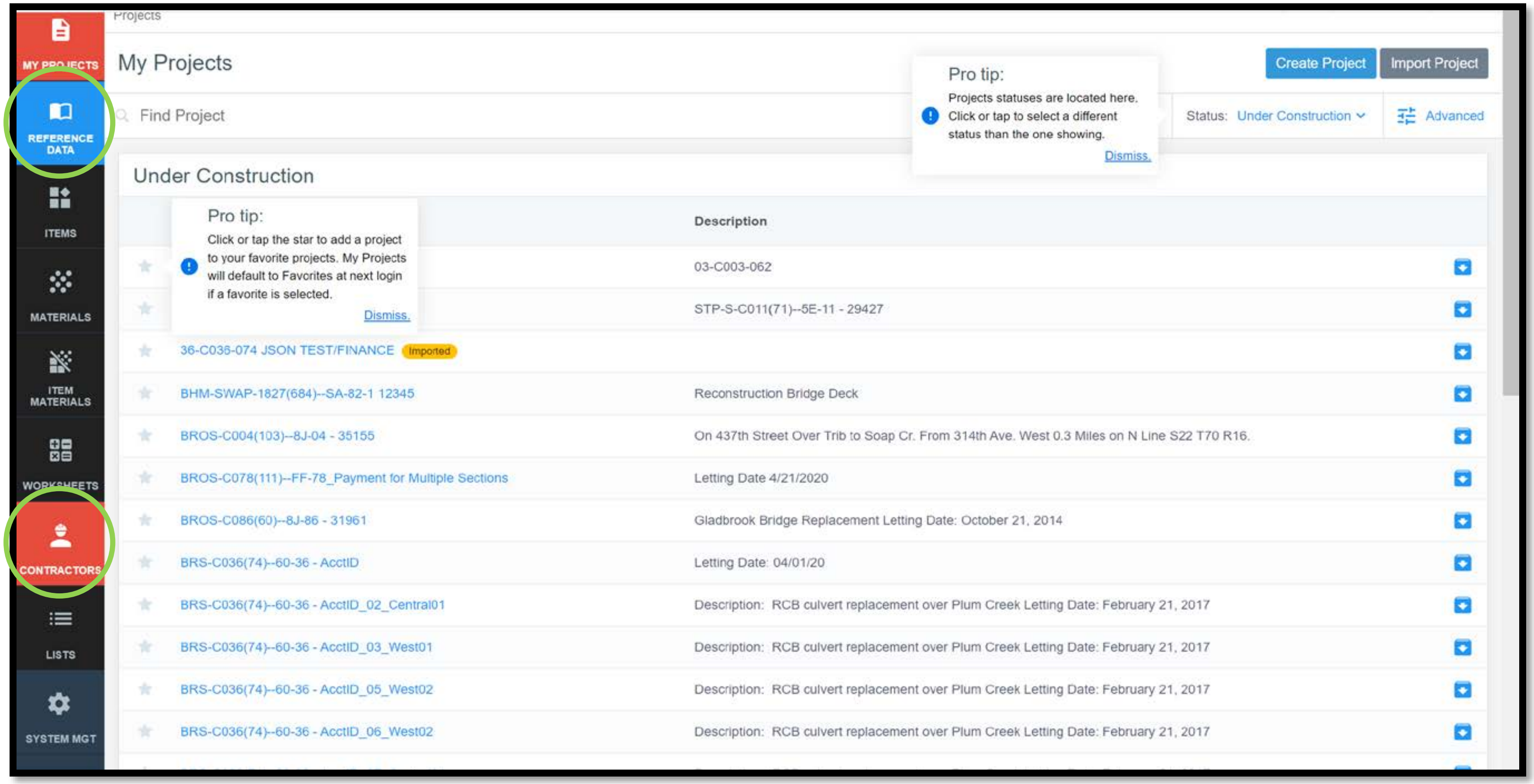
Click "Ok" in the pop-up window.



19 - Reference Data: Contractors

(System Administrator access level required.)

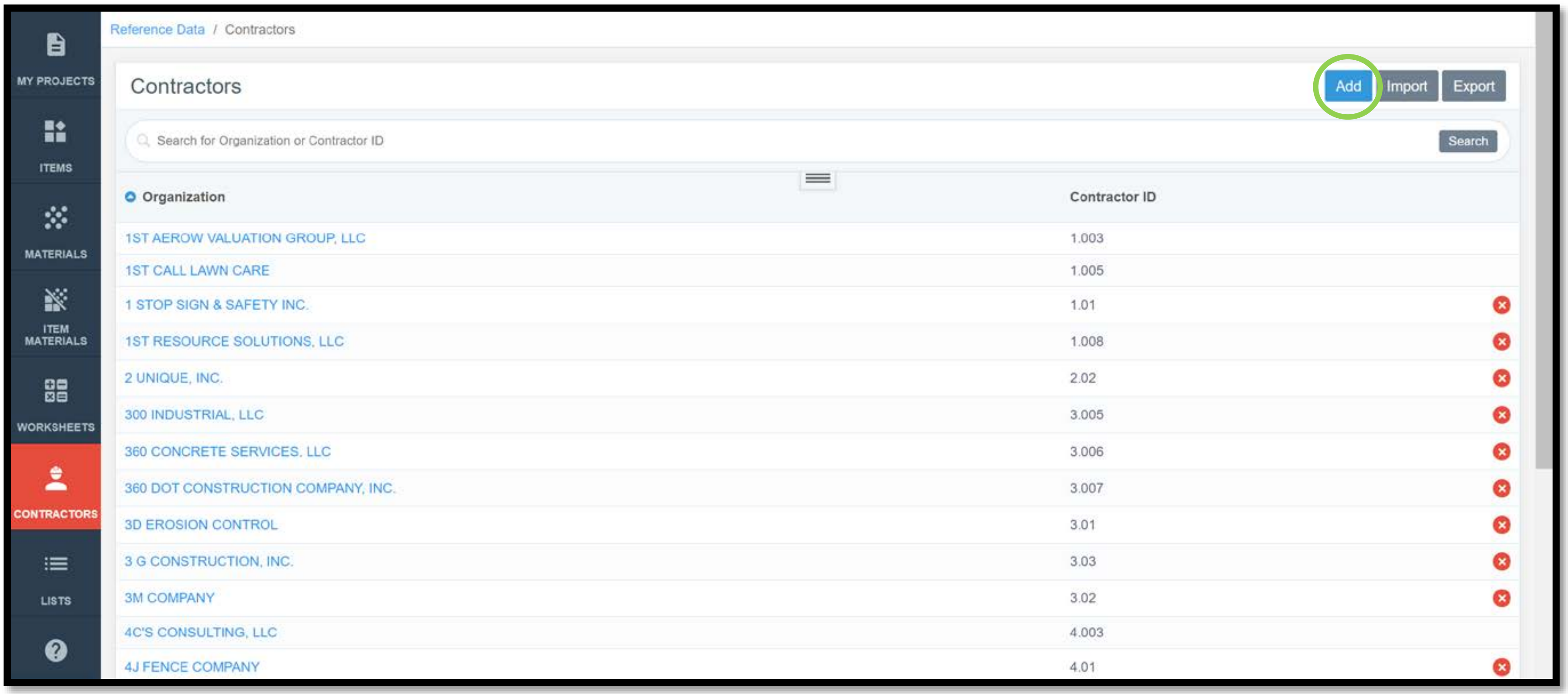
A list of approved contractors is given to each local agency when they set up their Appia account. To view the list of contractors present in the reference data, click on the "Reference Data" button in the left menu and then on the "Contractors" button in the expanded menu.



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.

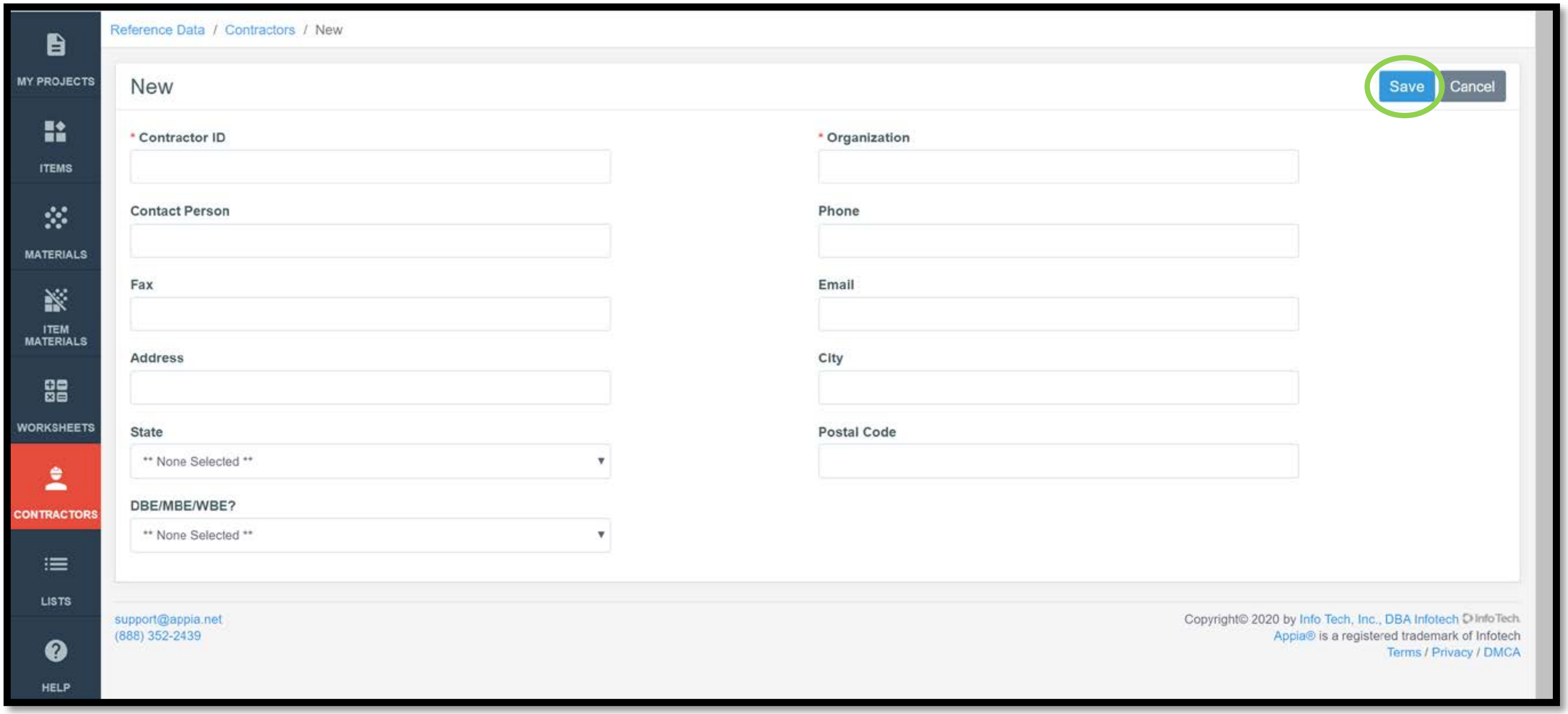
To add a contractor to the reference data set, click on the “Add” button in the upper, right corner.



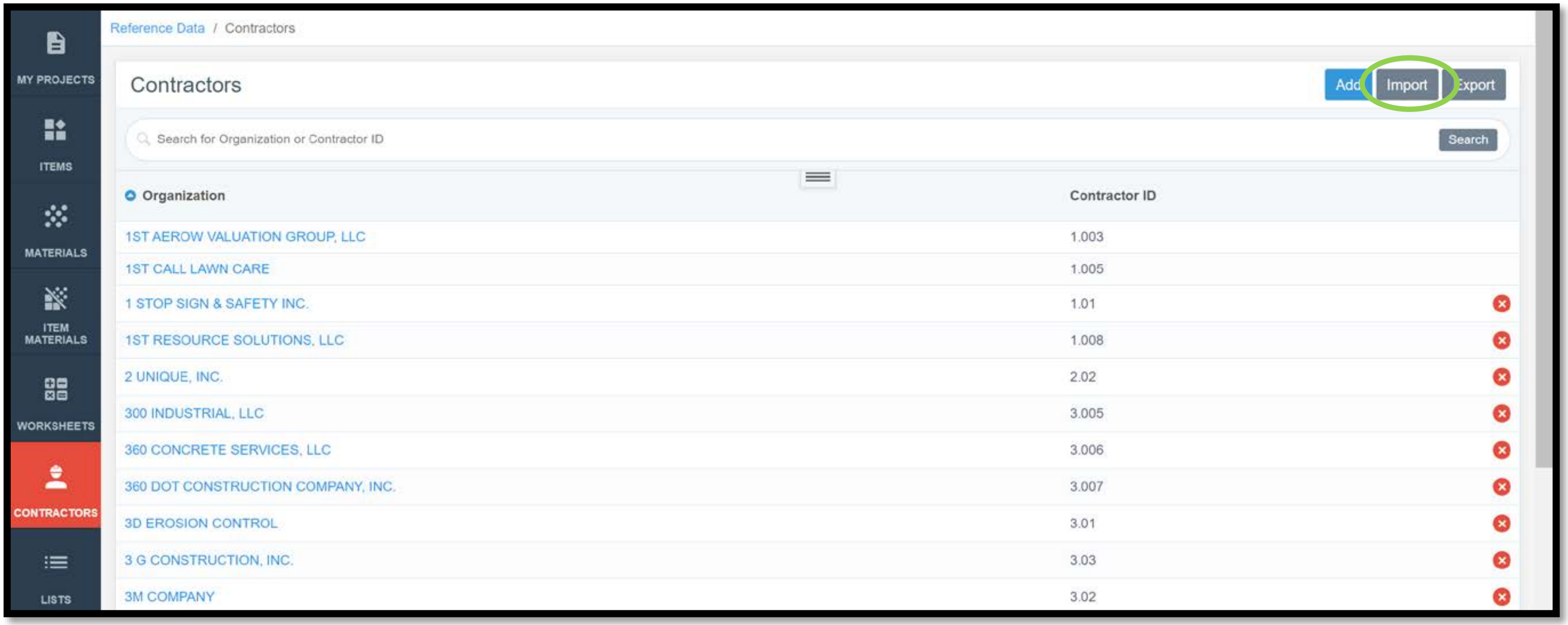
Enter the appropriate information on this screen.

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.



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”.

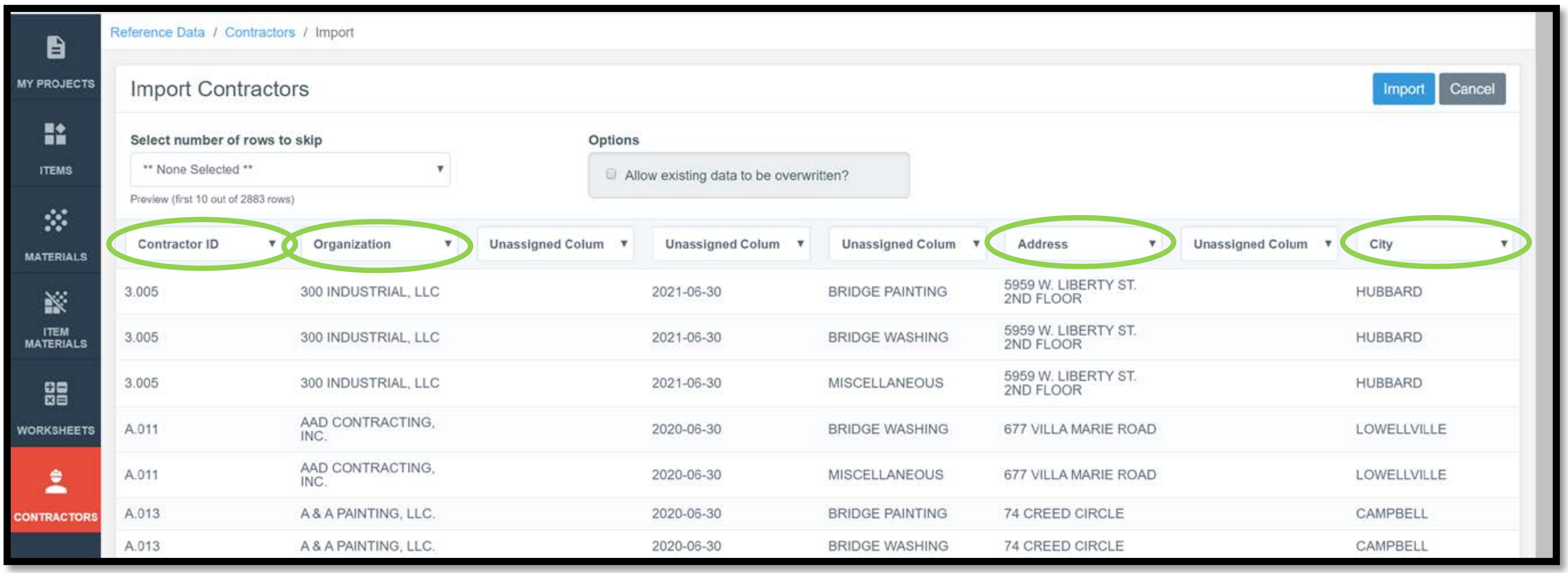


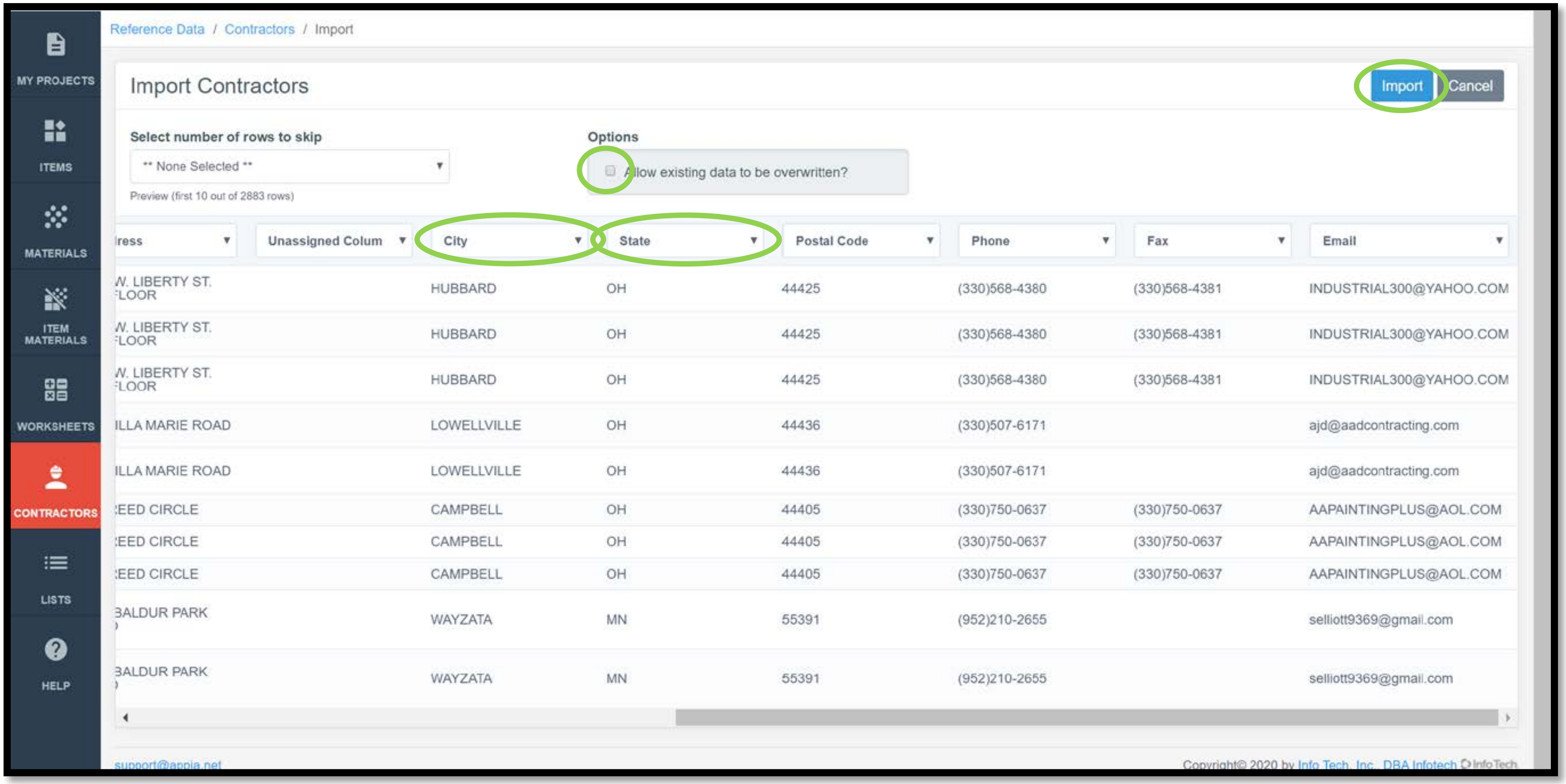
Browse for the .xlsx contractor list file you saved to your computer. Once selected, click on the “Upload” button.

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”



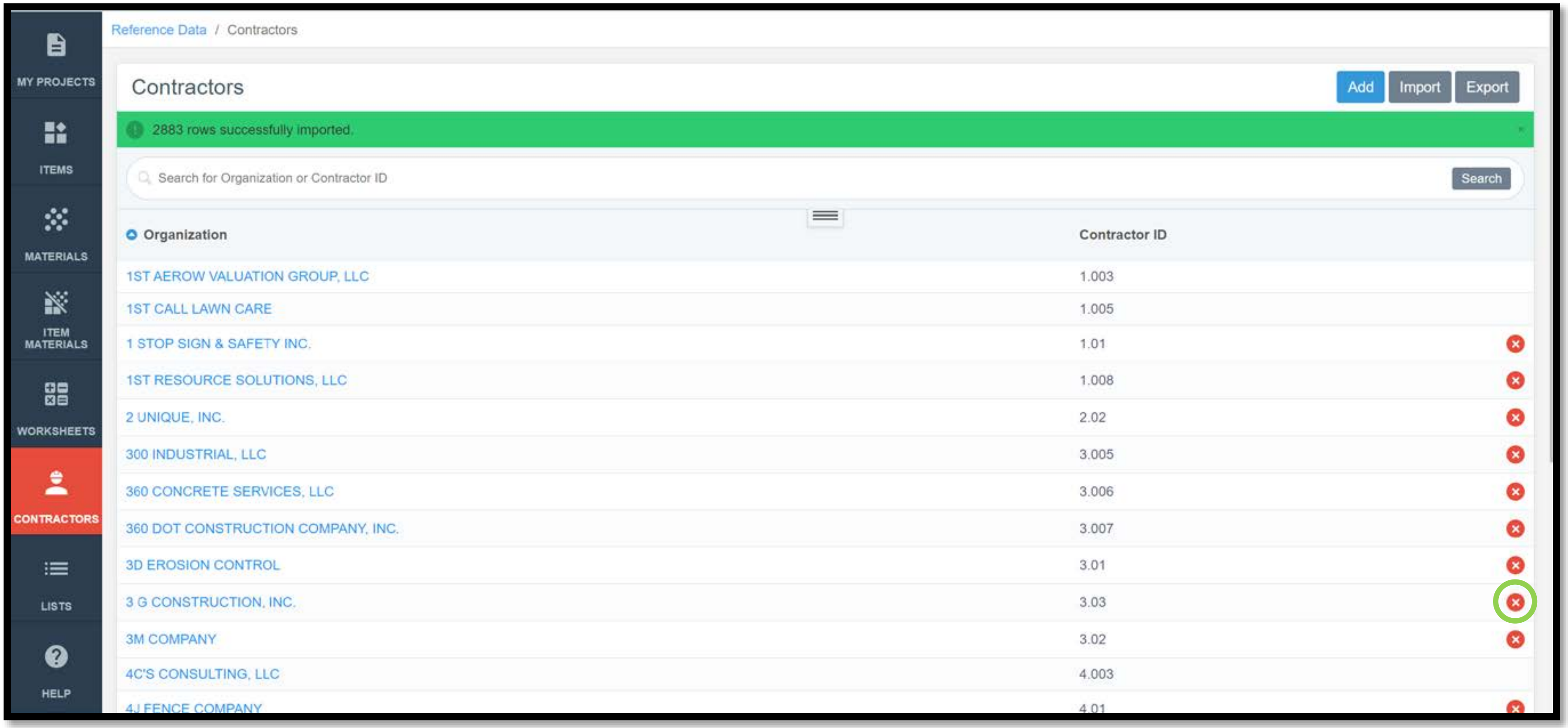


If you do NOT want your current list to be overwritten, do NOT check the "Allow existing data to be overwritten" box in gray. If you are ok with existing data being updated, check the box.

You do not need to select any rows to skip since there is no header in the .xlsx contractor list file.

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.



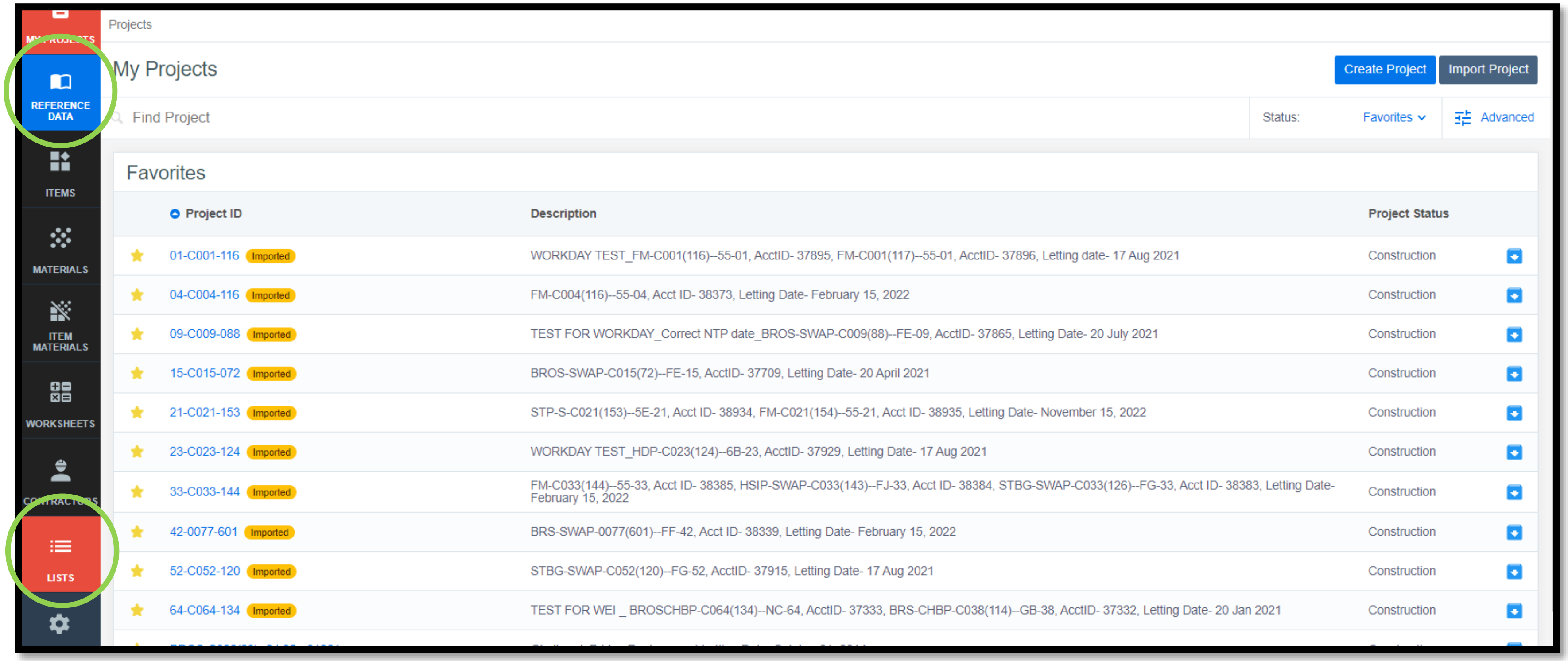
To delete a contractor from the list, click on the red circle with the “x” on the right side of the line.

20 - Reference Data: Lists

(System Administrator access level required.)

A. Overview of Lists

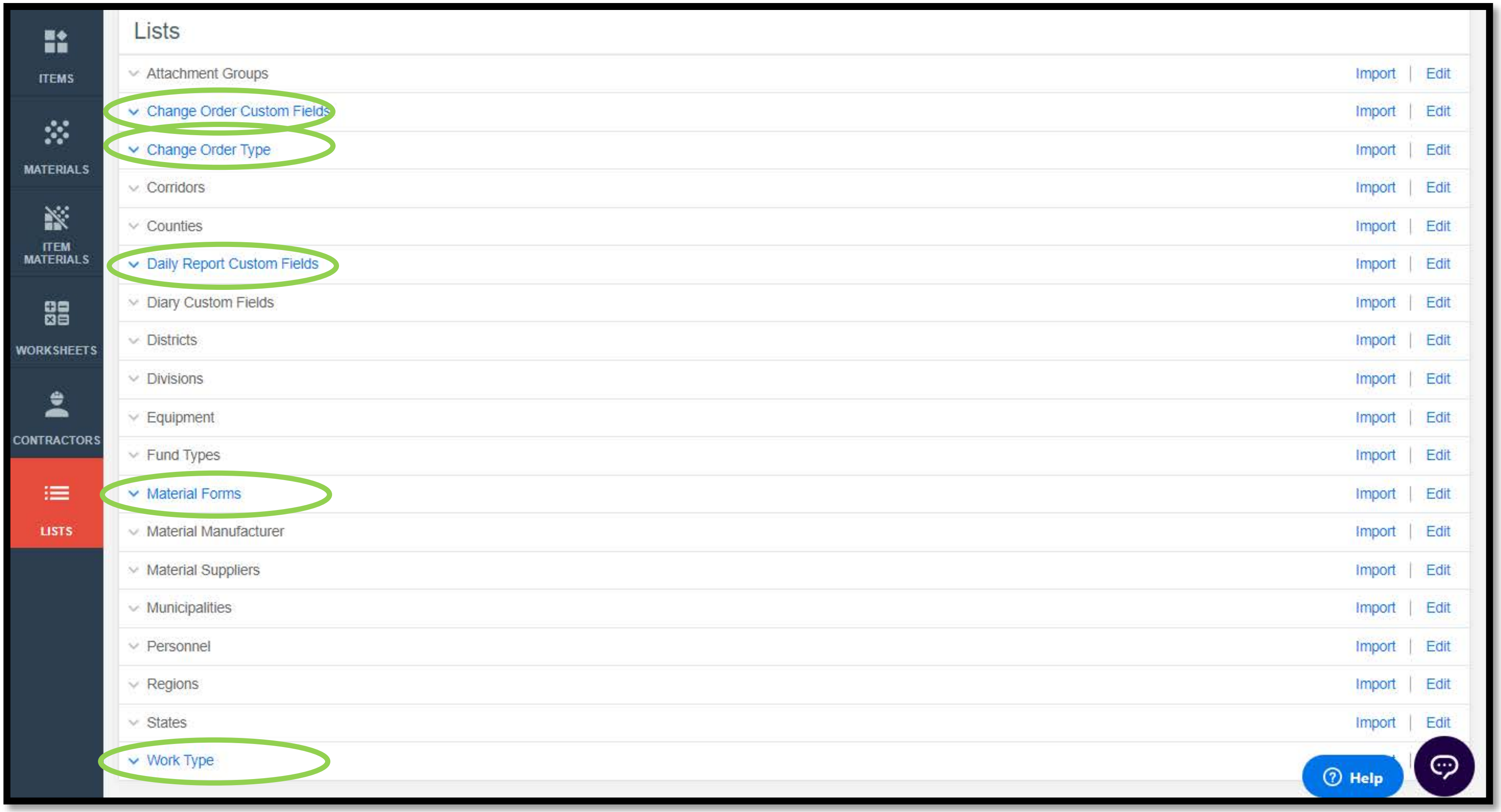
There are a variety of lists in the Reference Data. Lists contain information that populate choices in pull-down menus or create custom fields for data entry. To view the lists present in the reference data, click on the "Reference Data" button in the left menu and then on the "Lists" button in the expanded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



The 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.

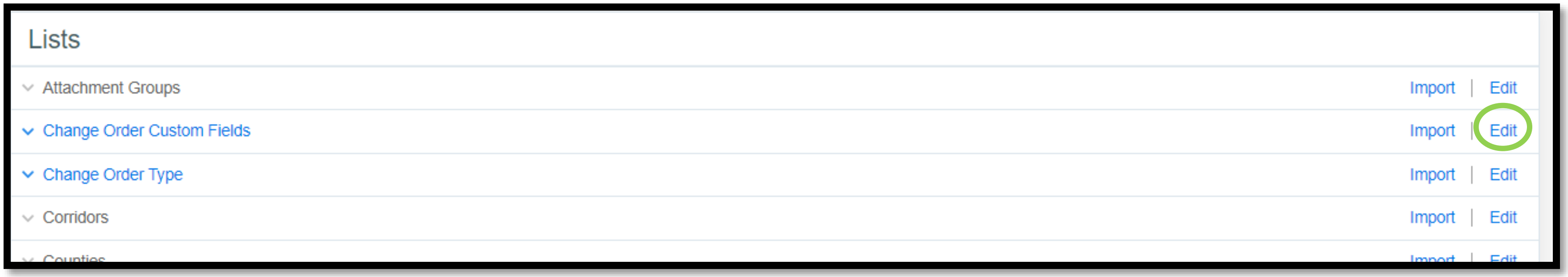

ITEMS
MATERIALS
ITEM MATERIALS
WORKSHEETS
CONTRACTORS
LISTS
Lists
Attachment Groups
Change Order Custom Fields
Change Order Type
Corridors
Counties
Daily Report Custom Fields
Diary Custom Fields
Districts
Divisions
Equipment
Fund Types
Material Forms
Material Manufacturer
Material Suppliers
Municipalities
Personnel
Regions
States
Work Type
Import | Edit
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.

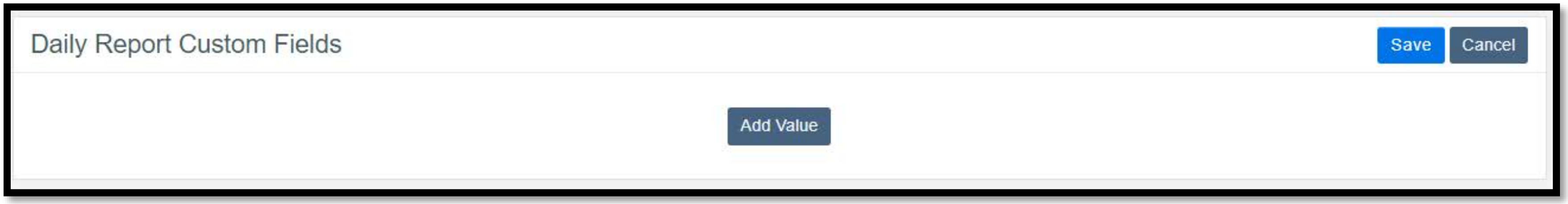
B. Editing Lists

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.

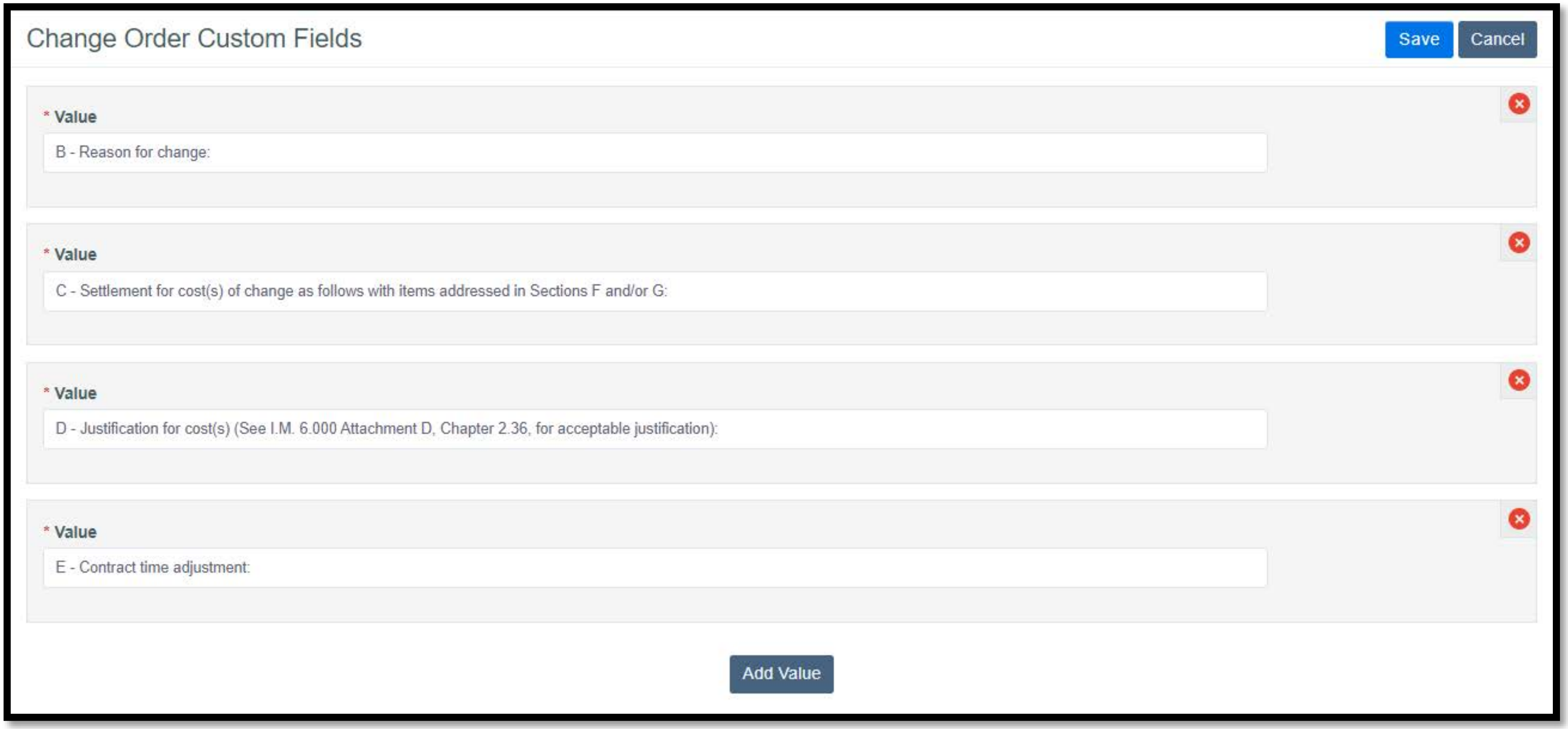
To edit the contents of a list, click the blue "Edit" text on the right end of the line containing the list's name. You may edit entries already existing in a list, or you may create new entries.



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).



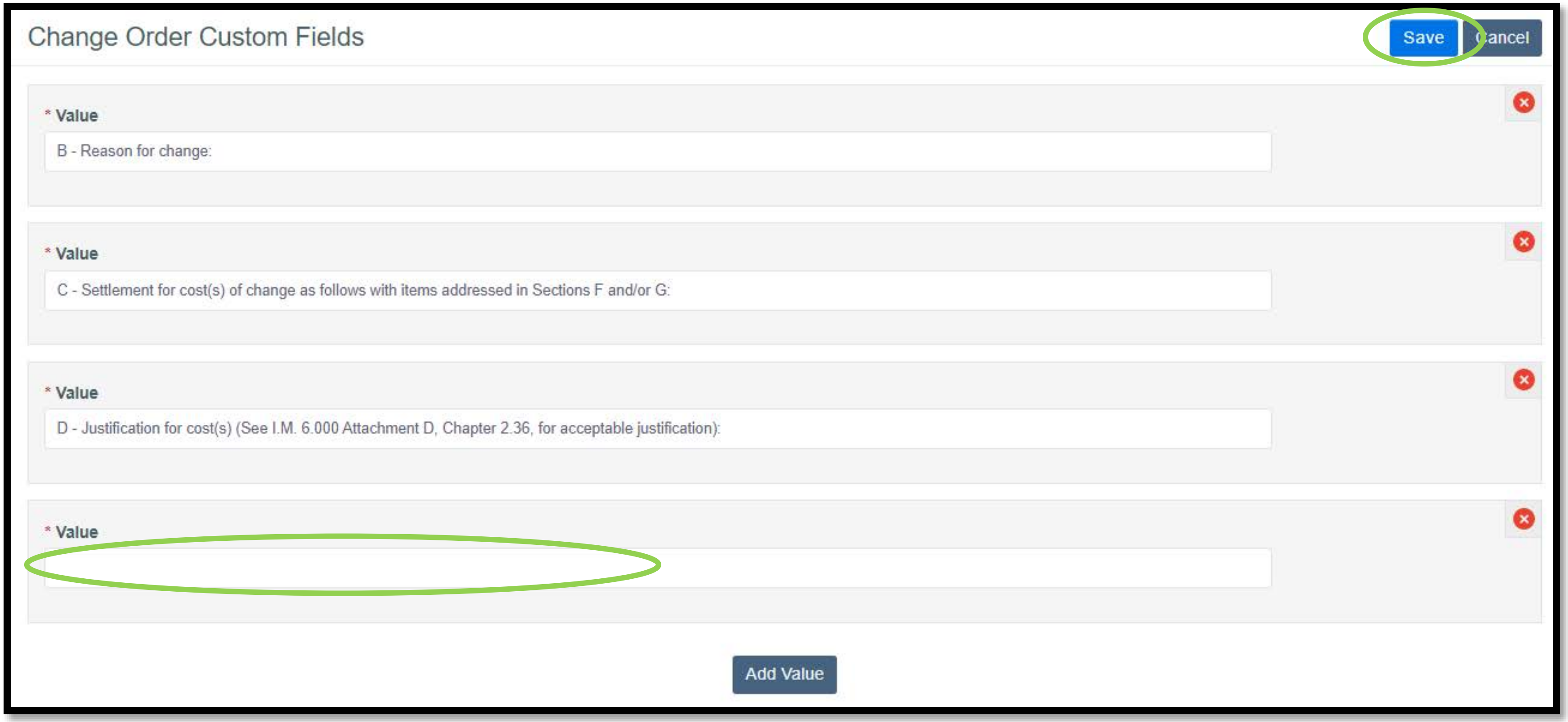
If the chosen list is currently populated/in use, you will arrive at a screen displaying fields for all of the existing items in the list, as shown below.



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

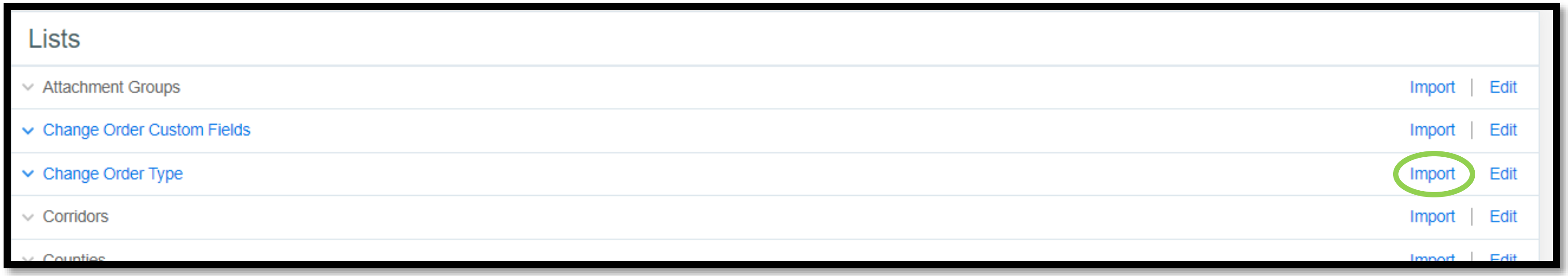
To add a new item to the list, click on the gray "Add Value" button at the very bottom, center of the screen. (You might have to scroll down a ways if the list is long.)

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.



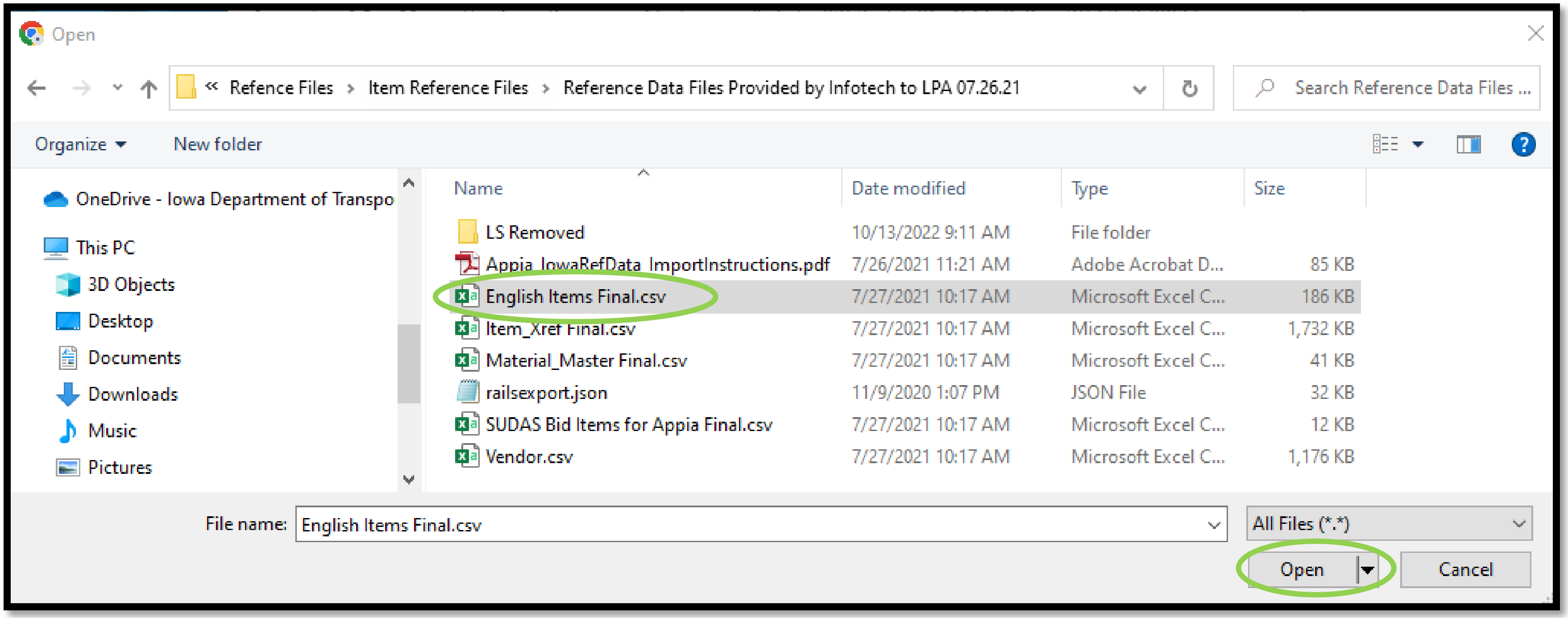
C. Importing Lists

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.

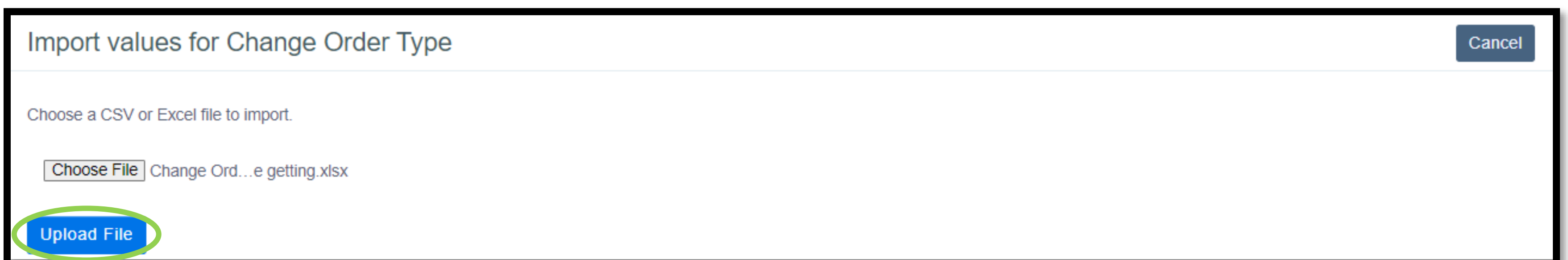


The following "Import values for" screen will appear. Click on the gray "Choose File" button near the left side of the screen.

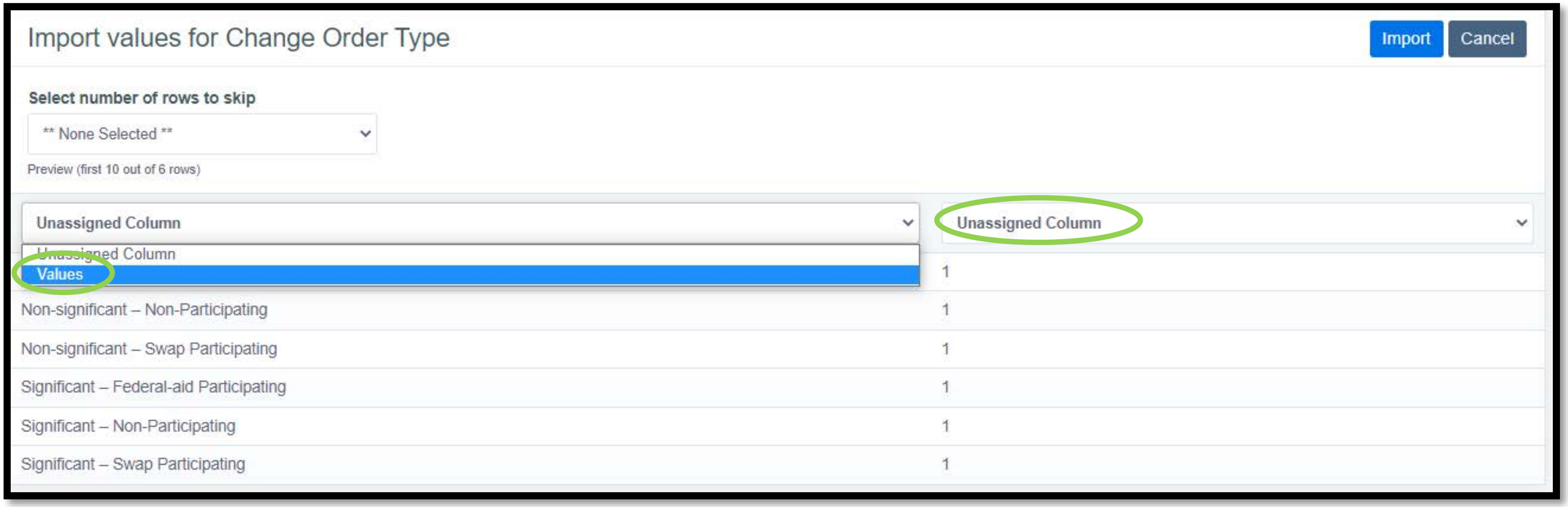
Navigate to the desired file in the file explorer window that pops up and click the gray “Open” button in the lower, right corner of the file explorer window.



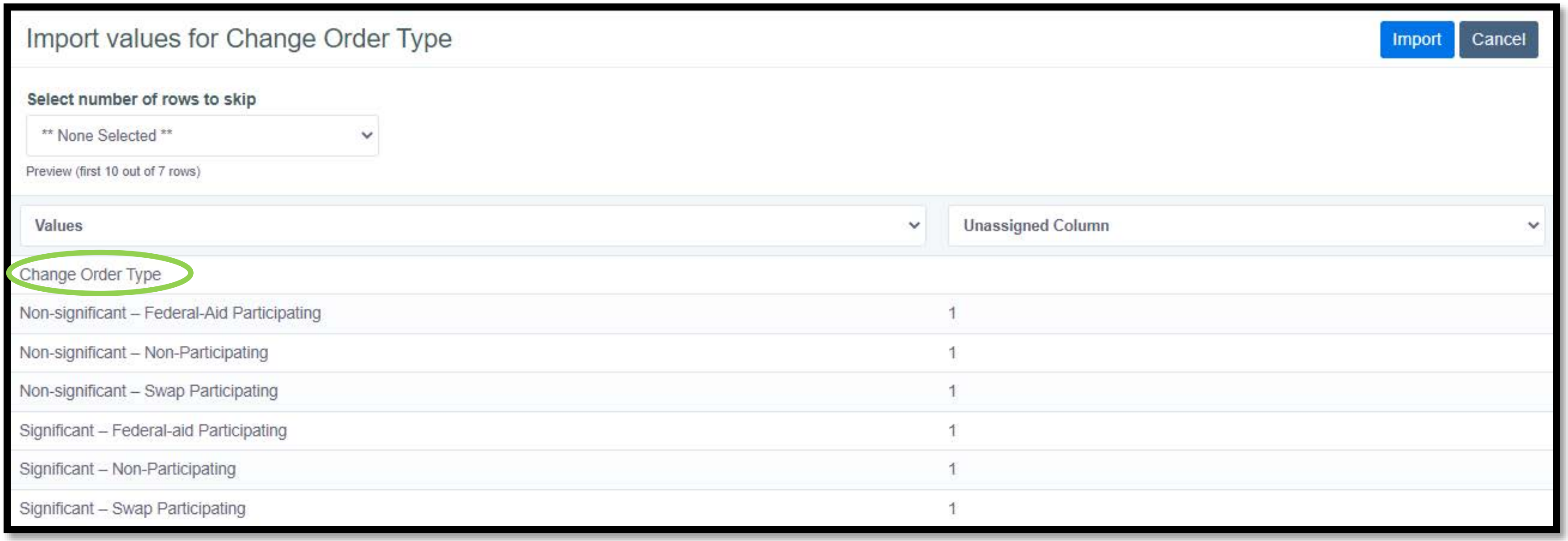
The “Import values for” screen will now show the name of the selected file to the right of the “Choose File” button. Click the blue “Upload File” near the bottom, left corner.

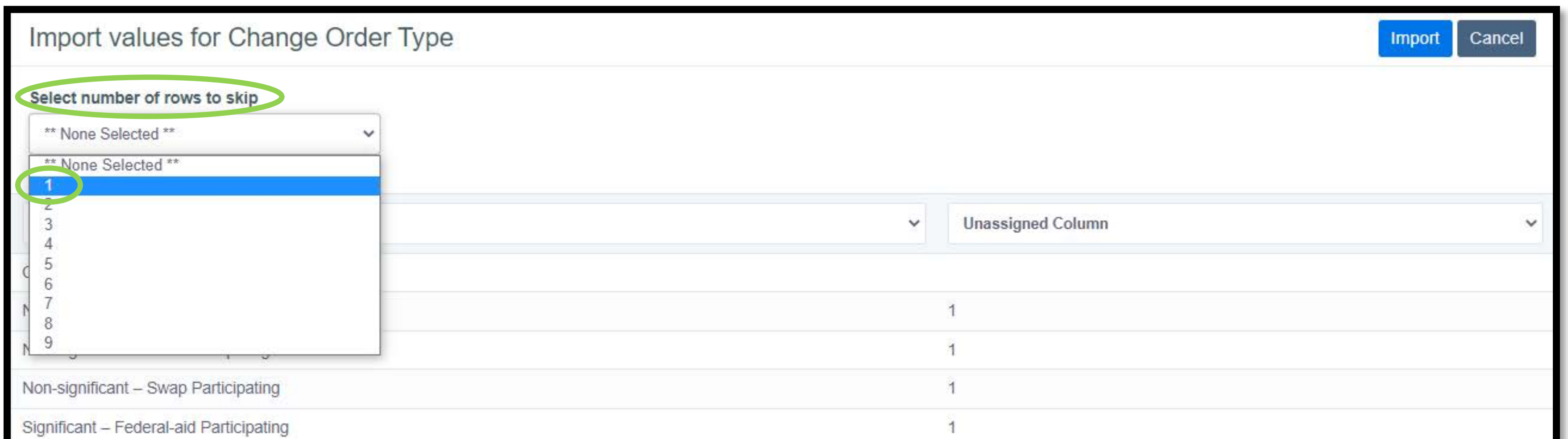


If there were multiple columns of information in the file you uploaded, multiple columns will show. Each will have a pull-down menu at the top showing "Unassigned Column". Select a name in the pull-down menu for only the columns you want to import. Any unassigned columns will be left out of the import.

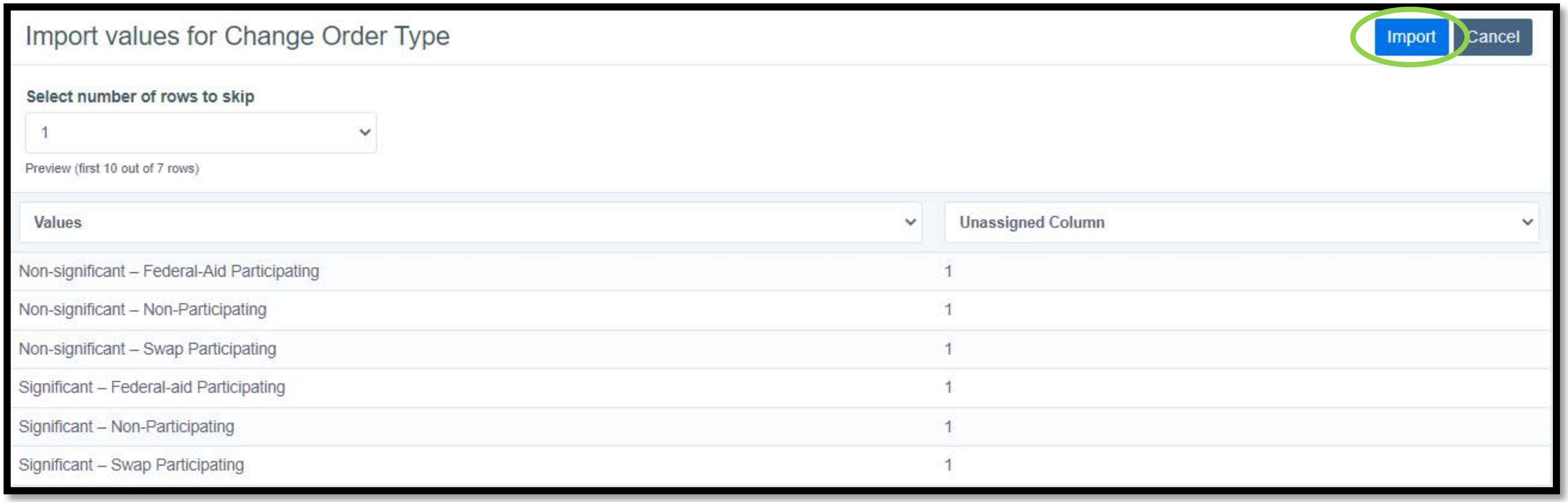


If there are headers in the imported file, select the number of rows that contain header information in the “Select number of rows to skip” pull-down menu near the top, left corner. This will cause the information in the header row to disappear from view and the import.

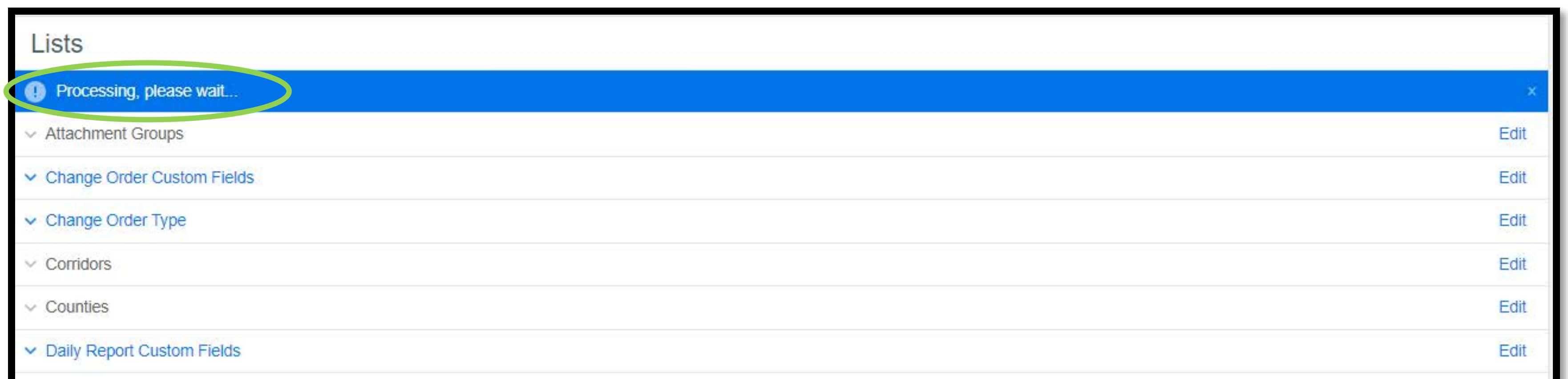




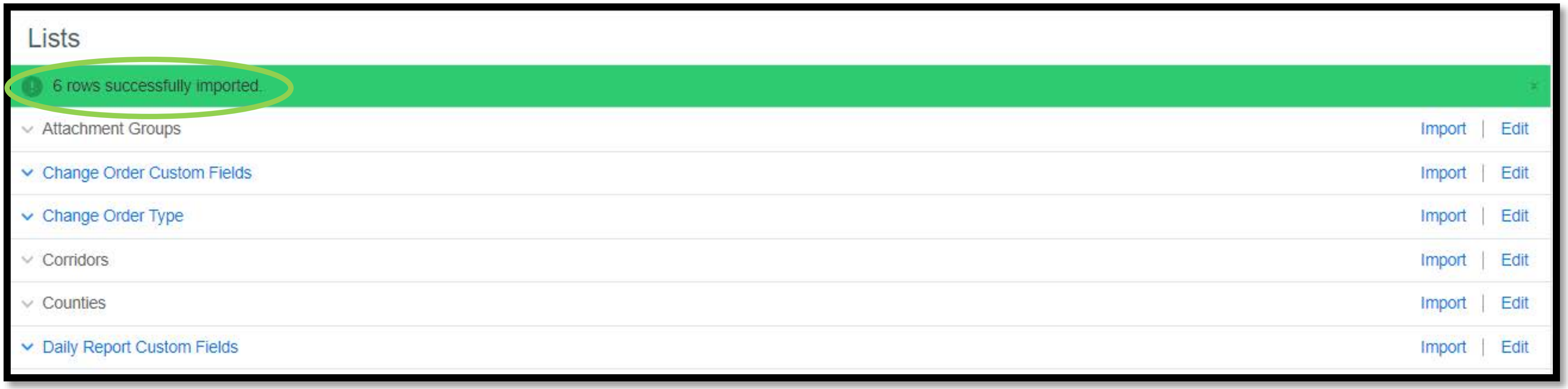
When the columns have been named and the number of header rows to skip has been specified, click on the blue "Import" button in the top, right corner.



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.



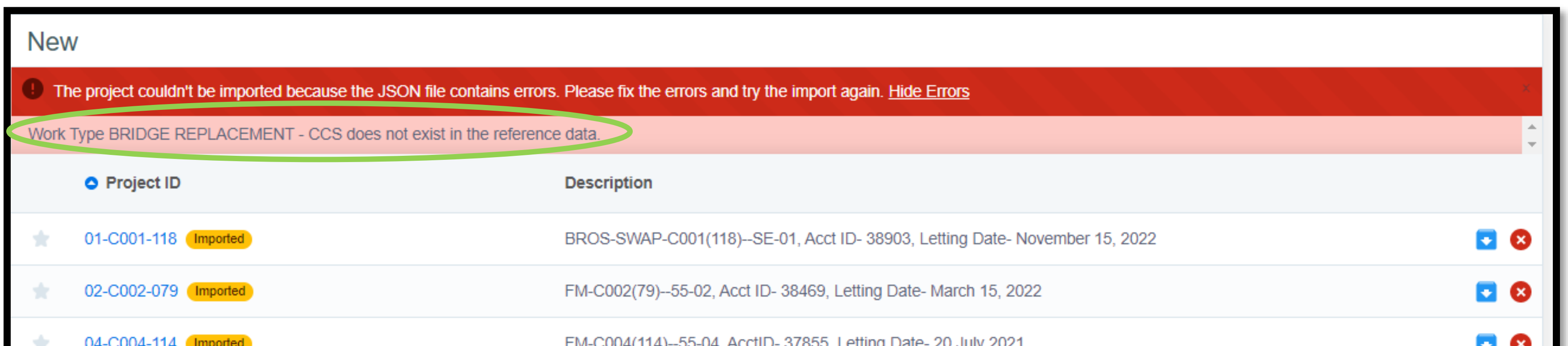
When the list has been imported successfully, a green "'X' rows successfully imported" ribbon will appear. The import was successful, and the list has now been populated.



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”.

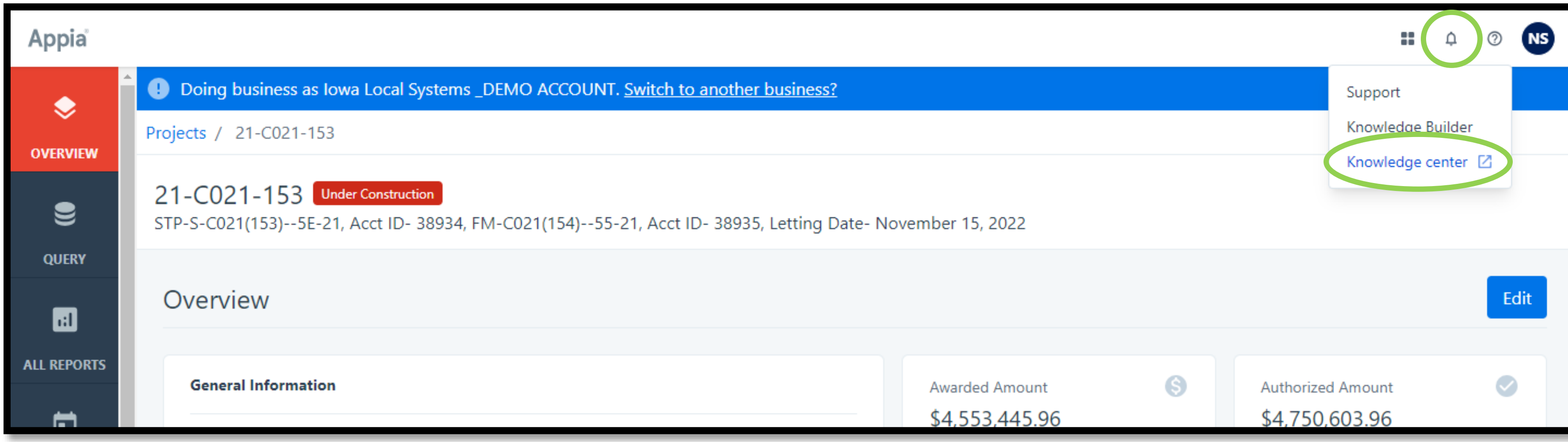
When you click on “Show Errors”, the red ribbon will expand downward, and the specific errors will be listed. If one of the errors says, “Work Type xxxxx does not exist in the reference data.”, then that item/work type is missing from your reference data set. You need to add it. Refer to Section B. Editing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



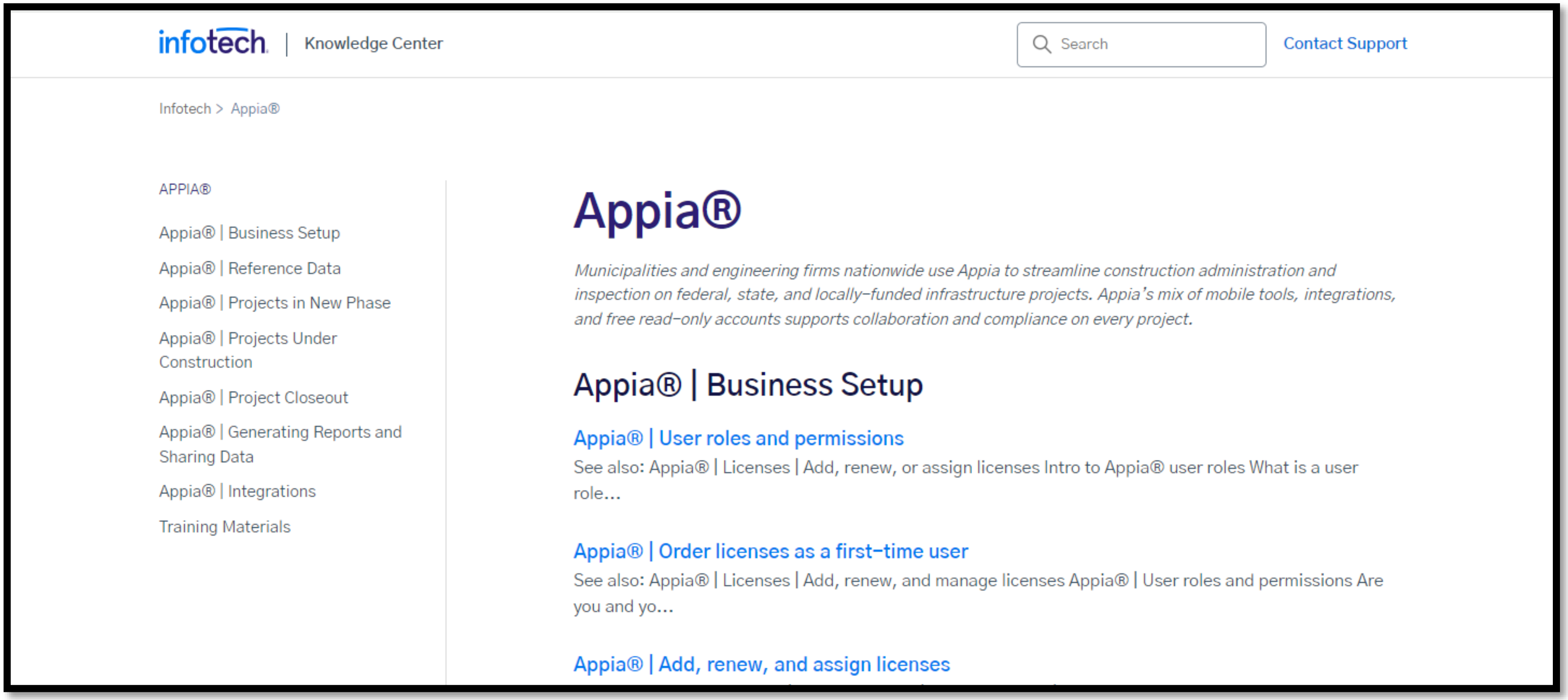
21 - Help & Local Systems Contact Information for Questions and Assistance

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



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

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

Phone: 515-239-1391
(Messages forwarded. Leave message if unanswered.)

Days: Monday-Friday

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