Doc Express® Manual 2025

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Definitions

User Roles:

Agency Users: All DOT, County, City, and Consultant users serving as project engineer/inspectors.

Associate: All Suppliers, Subcontractors, and Consultant users serving as a subcontractor to the Prime Contractor.

Prime: The Prime Contractor for a contract.

Reviewer: FHWA and State Auditor users.

General Definitions:

Actions: Additional actions/options available under a gray drop-down menu found on both the contract summary page and within each Drawer.

Contract summary page Actions: Manage Access, Manage Tags, Export, Export Log.

Drawer Actions: Upload Multiple Documents, Details, Manage Access, Exports.

Dashboard:

Locked Contracts: Contracts that have been archived.

Details (aka Workflow): A pre-defined Workflow for each Drawer. The Workflow defines what user(s) submits a document, what user(s) perform a Transition on that document, and what order the Transitions are to occur. The Details option is found under the gray Actions drop-down after opening each Drawer.

Digital ID: The most secure type of electronic signature utilized within Doc Express®. The Digital ID is used solely in the Contract Signing drawer when a user is applying their signature to the Contract for all DOT let projects, and for applying their signature to the Contractor's Performance Bond for Local Agency contracts.

Drawer: Similar to a filing cabinet drawer, but electronic. A grouping of subfolders falling under a general category, for example Change Order, Contract Documentation, etc.

Notification: User specific settings that include options to receive email notifications from Doc Express® that include updates for files found within a particular Drawer(s) and/or associated with a particular Type(s).

Tag: A small yellow rectangle found to the far right of a Drawer name that indicates the number of files uploaded to that Drawer that have not had any action taken on them.

Transition: A button available to click on to take an "action" on a file uploaded to a Drawer and associated with a Type. The action can include options to indicate the file is acceptable, apply an approval/signature, reject an unacceptable file, etc.

Type: Subfolders within a Drawer to further organize file within that drawer.

Update: A blue button found after a file name that allows a user to modify a file name and/or the Type(s) the file is associated with.

Account Activation

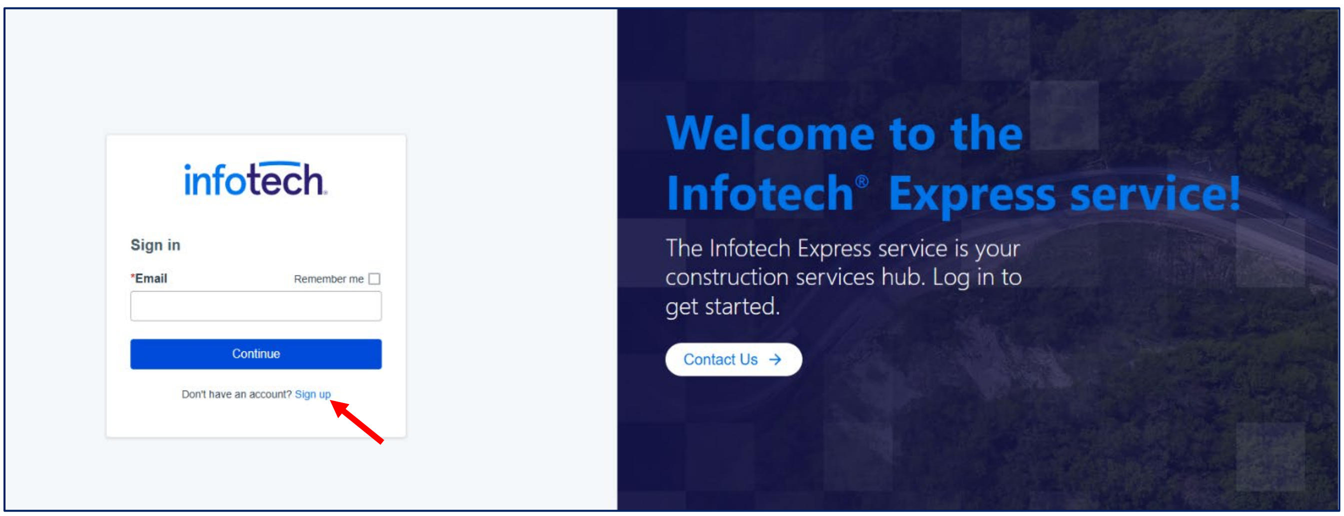
The process to activate a Doc Express® account varies depending upon the type of organization you are associated with, and whether that organization has previously established a Doc Express® account. The following guidelines will explain the different account activation methods. These instructions are for establishing new Doc Express® accounts. To be added to an existing Doc Express® account, contact one of the Account Managers for the existing account.

Establishing a New Company Account

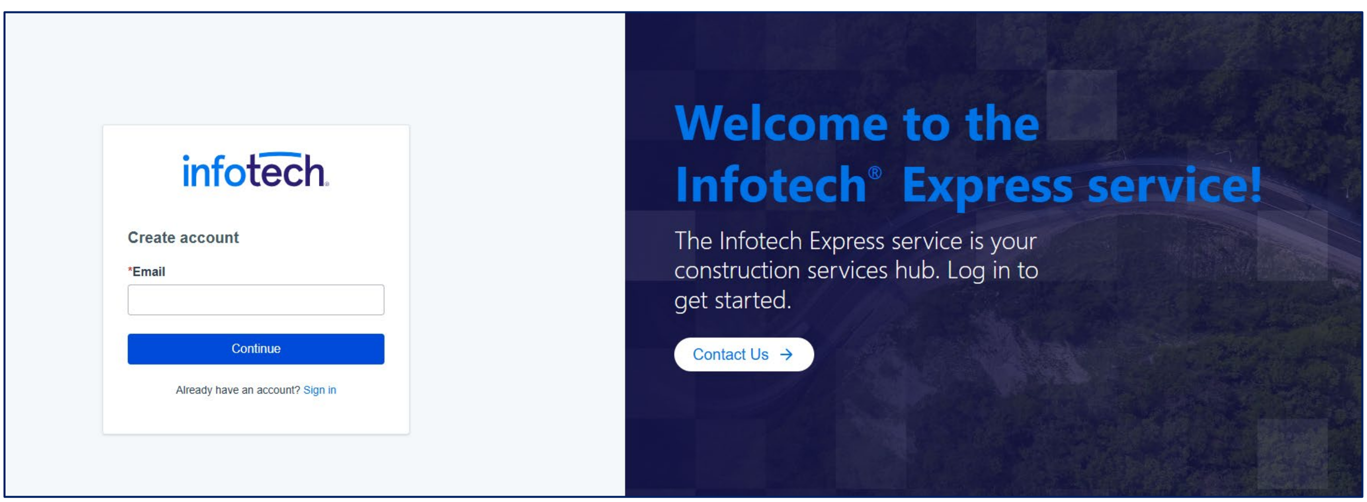
Contractors, Suppliers, Consultants Working as a Subcontractor

To activate a new company account (please be certain that a company account was not previously activated by someone else within your company), visit the following web address: https://infotechexpress.com/login

Click on the blue Sign up found below the Continue button.



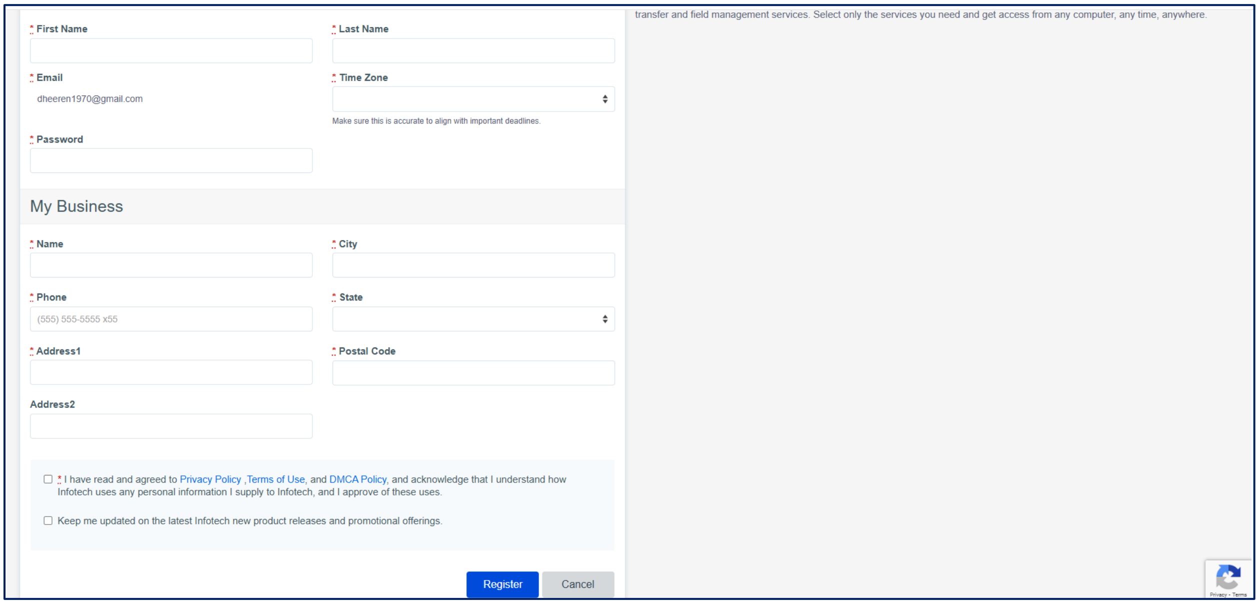
Type your email address in the box titled 'Email' and click on the blue 'Continue' button.



Provide the requested information on the page that opens (Name, Password, Business Name, etc.). Check the box with the statement:

> "I have read and agreed to Privacy Policy, Terms of Use, and DMCA Policy, and acknowledge that I understand how Infotech uses any personal information I supply to Infotech, and I approve of these uses."

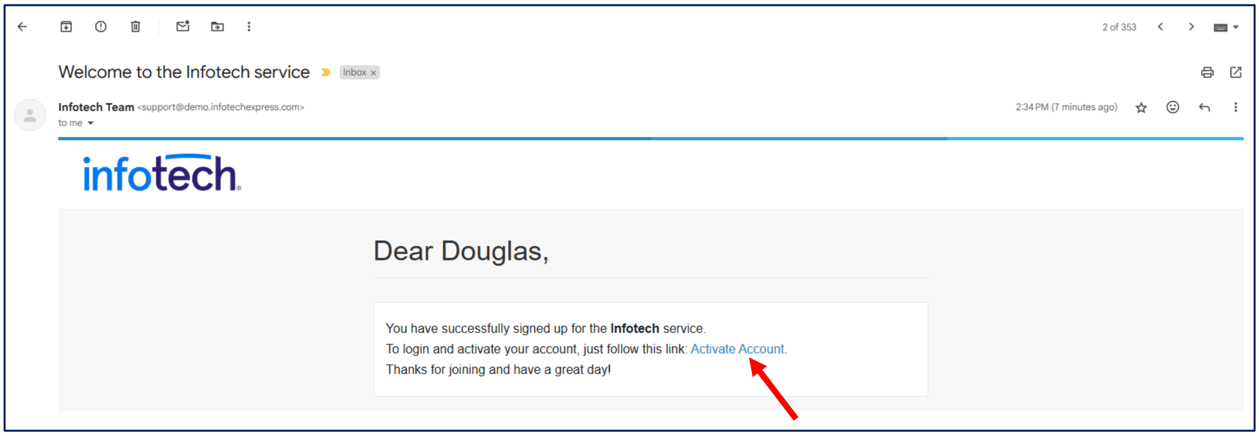
Then click on the blue 'Register' button.



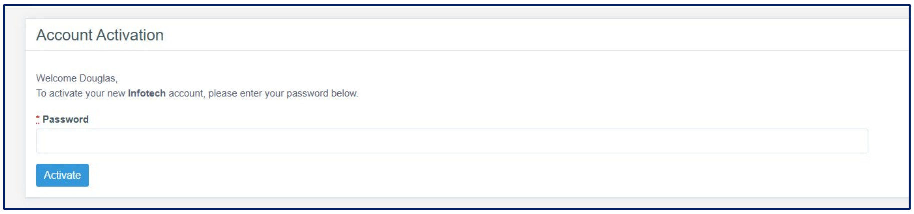
You will be prompted to verify your address.

An email will be sent to the email address you entered for the account. The email will come from Infotech® Team. If you do not see the email in your Inbox, check your Junk or Spam folders as the email will occasionally be identified as Junk or Spam.

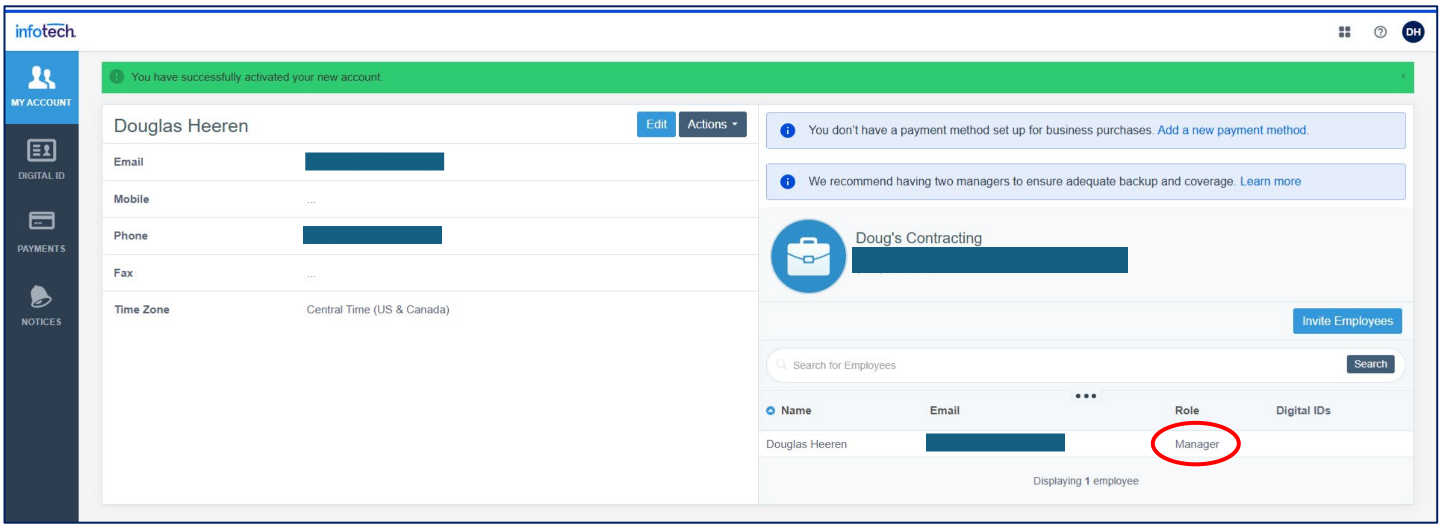
Open the email and click on the blue 'Activate Account' hyperlink.



On the screen that opens up, enter the password you entered when providing your information for the new account. Then click on the blue ‘Activate’ button.



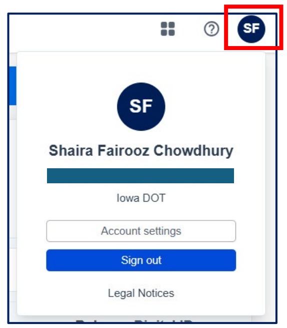
You have now successfully activated a new company account.



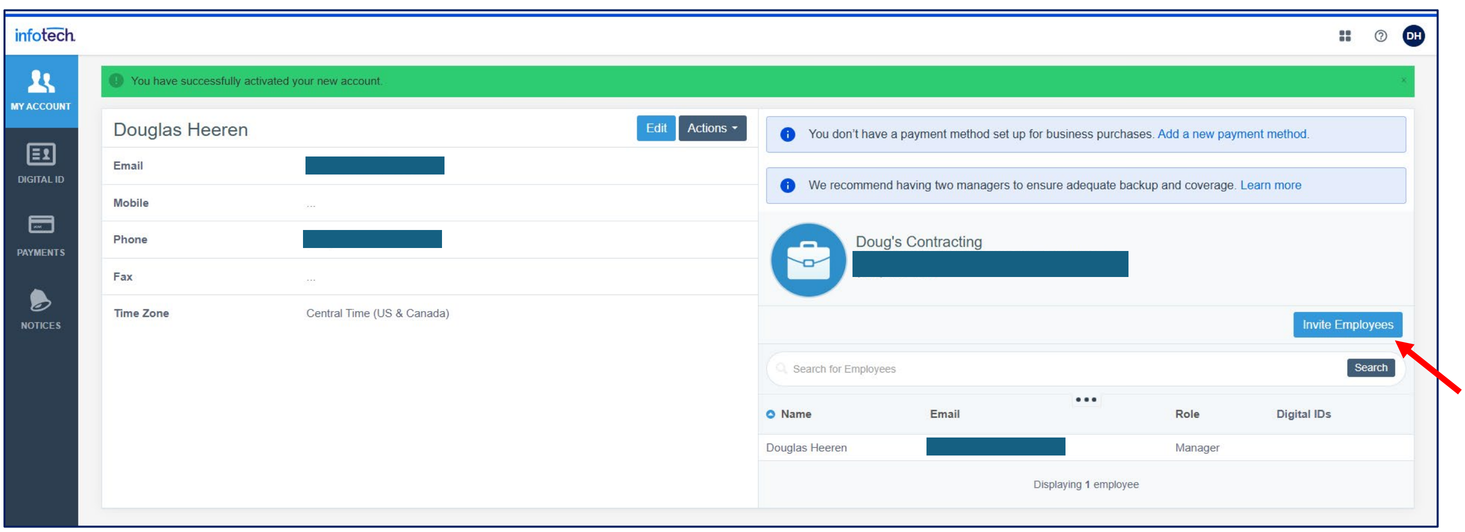
Note that your Role for the new company account shows as Manager. This means you have the ability to add users to, or remove users from, the company account. It is highly recommended that each company account has a minimum of two Managers, in case one of the Managers is not available or leaves the company.

Adding Other Employees to a Doc Express® Account

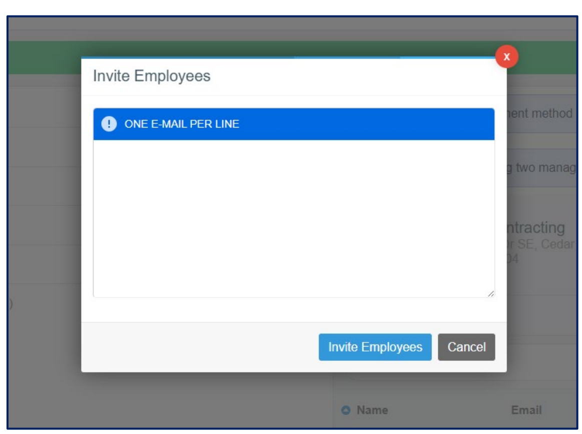
If you are not already on the Accounts Setting page, log into your Infotech® account and click on the black ball found on the top right of the screen with your initials in it. In the window that expands choose the option for Account Settings.



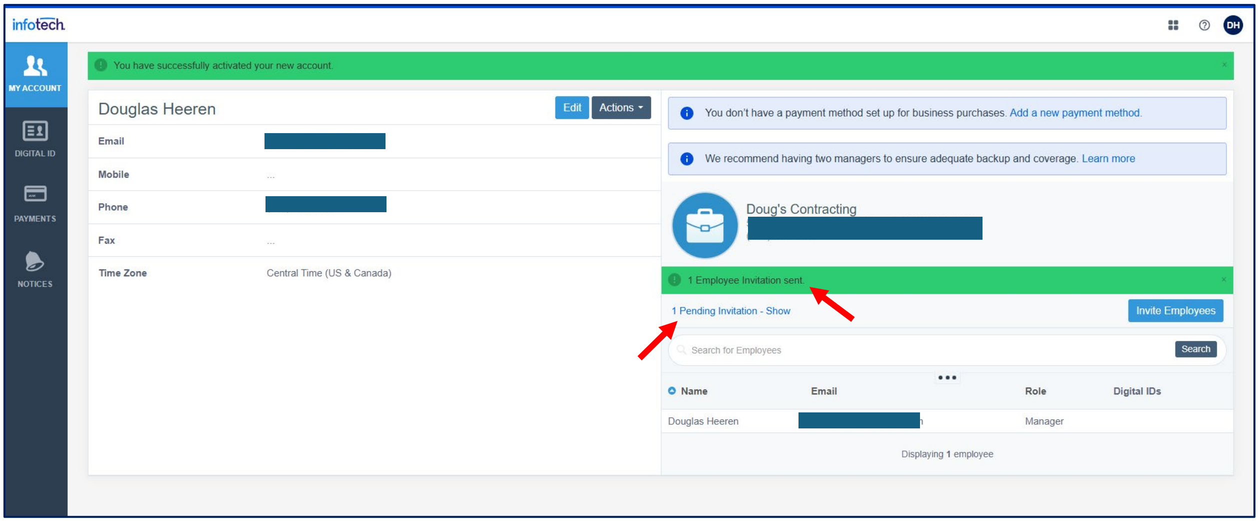
To add other employees to the account, click on the blue Invite Employees button.



In the box that appears, type the employee's email address. You can enter multiple email addresses if you wish, just be sure to separate each email address on a different line in the box. When the email address(es) have been entered, click on the blue Invite Employees box.

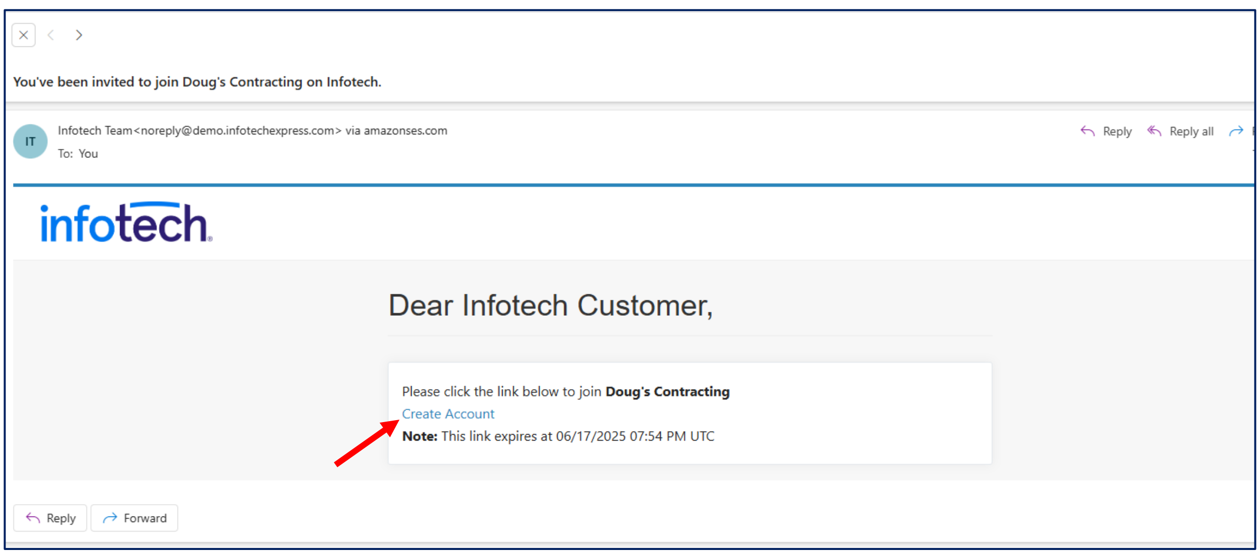


On the screen that appears, you will see that you sent a successful invitation to join the account. The status of the invitation is also shown in blue. You can monitor the status of the invitation from your Account Settings screen.

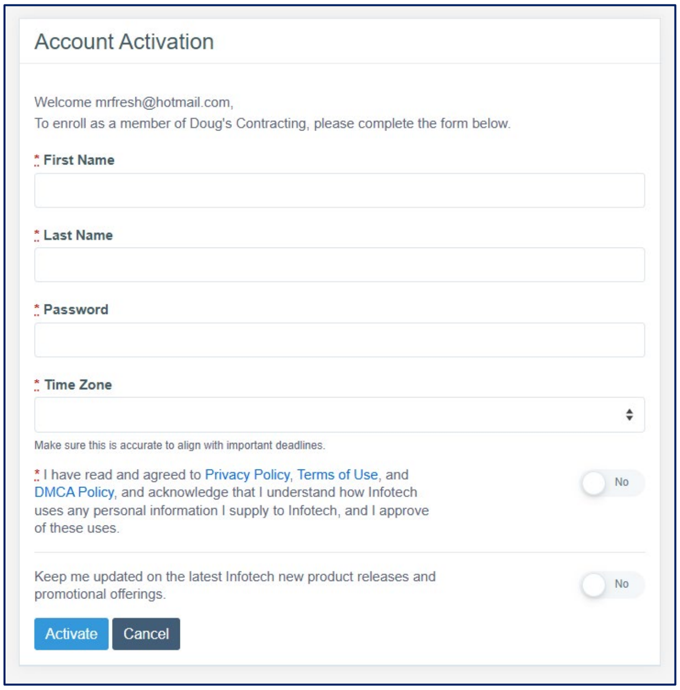


The employee will receive an email from Infotech® Team. If they do not see the email in their Inbox, ask them to check their Junk or Spam folders, as the email will occasionally be identified as Junk or Spam.

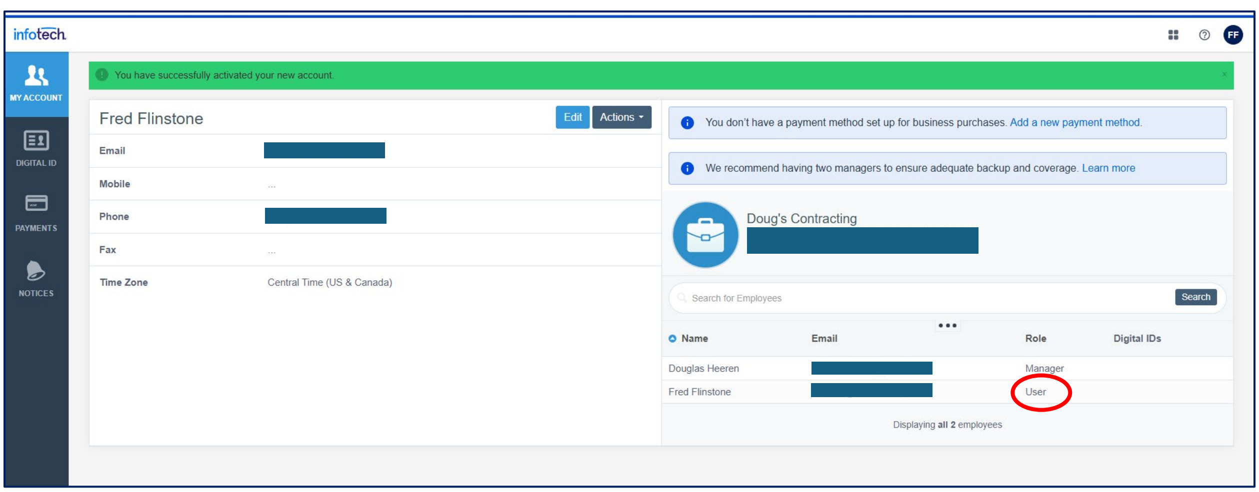
The employee will click on 'Create Account' in the email they receive.



Since the Doc Express® account was previously created, the employee has less information to provide. They need to enter their name, a password, time zone, and toggle the option to 'Yes' for the "I have read and agreed to…" option. Then click Activate.



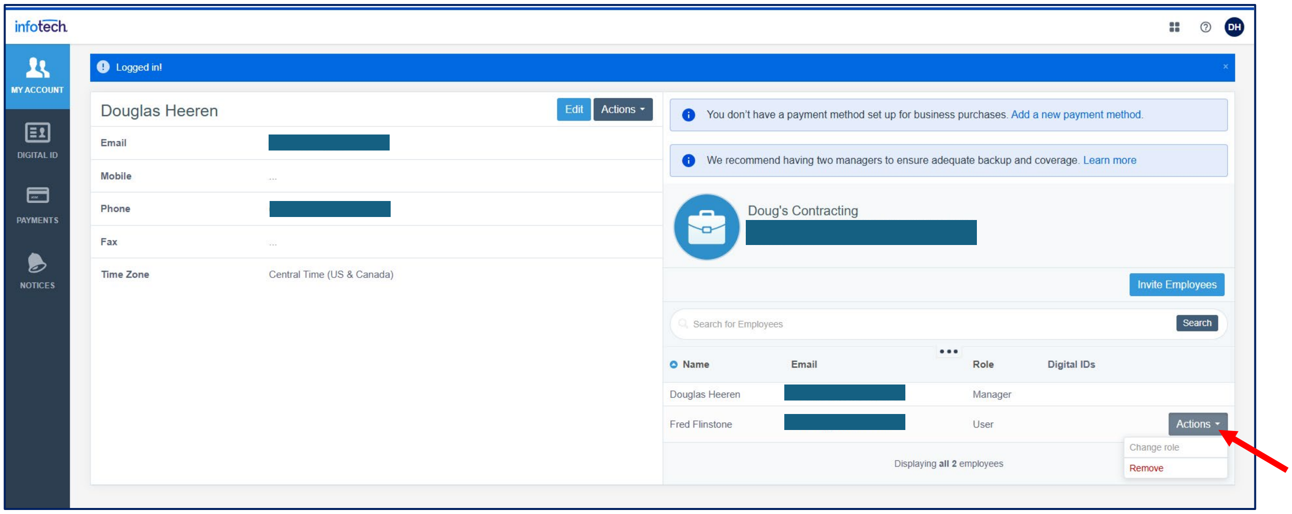
The employee will be redirected to their Account Settings screen. Note that their Role is shown as 'User' instead of 'Manager'.



The Manager that initiated the employee invitation will receive an email indicating the employee has accepted the invitation. If the Manager opens their Account Settings screen, they will see the employee has been added and that their Role is User.

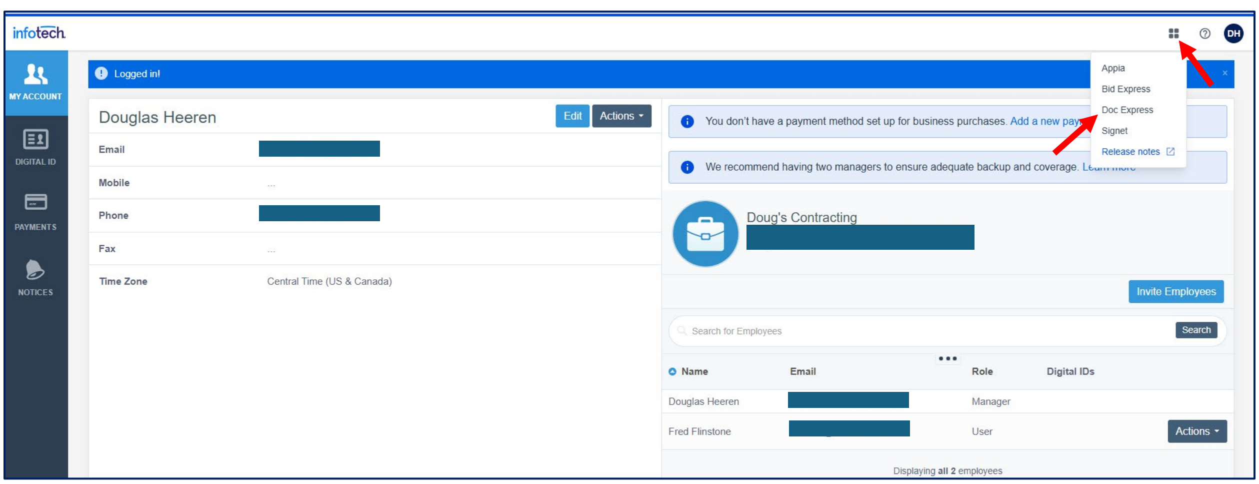
Adjusting User Roles and Removing Users from Account

If the Manager of the account would like to elevate an employee to have a Role of Manager, or if they need to Remove an employee from the account, click on the Actions drop-down found to the right of the employee's name and choose the appropriate option.

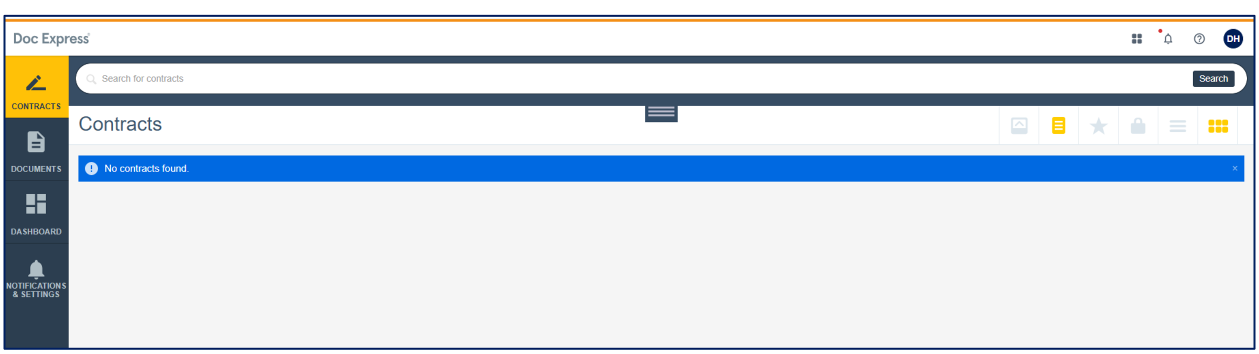


Accessing Doc Express from Account Settings

For the account Manager or Users to access Doc Express® from the Account Settings screen, click on the four black squares found on the upper right of the screen and choose the option for Doc Express®.



You will now be taken to the main launch screen for Doc Express®.



Initially, you will not have access to any contracts.

To be provided access to contracts:

Prime Contractor: The prime contractor’s access will be provided by the Iowa DOT for projects let by the Iowa DOT. For Local let projects utilizing Doc Express®, access will be provided by the Contracting Authority.

Subcontractors and Suppliers: Contact the Prime Contractor to be provided access to contracts.

Cities/Counties/Consultants Serving as Engineers/Inspectors for Cities/Counties: Contact Derek Peck by emailing Derek.Peck@iowadot.us or by calling (515) 239-1391.

Iowa DOT Employees/Consultants Serving as Engineers/Inspectors for Primary projects: Contact either Jen Strunk, by emailing Jennifer.Strunk@iowadot.us or by calling (641) 344-0044, or Tyson Sickles, by emailing Tyson.Sickles@iowadot.us or by calling (515) 290-1046.

Cities, Counties, Consultants Serving as Project Engineer/Inspector

DO NOT try to register for a Doc Express® account on your own. You will end up with a Contractor type account when you need an Agency type account instead. You also will not have the proper permissions you need to administer contracts.

To have a Doc Express® account activated, you must contact Derek Peck by emailing Derek.Peck@iowadot.us or by calling (515) 239-1391.

You need to provide Derek with the name of the agency that needs to be created and the name(s) and email address(es) for who will serve as Account Manager. It is highly recommended that each Agency account have a minimum of two Account Managers in case someone is not available, or someone leaves the agency.

Derek will then contact Infotech® Onboarding. The Onboarding team will reach out to one of the employees you provided to Derek to be an Account Manager and will help them establish the Agency Account. Once the account has been created, you will be able to add other employees to the account by following the process noted on Page 8 of this document.

Iowa DOT Employees

DO NOT try to register for a Doc Express® account on your own. You will end up with a Contractor type account when you need to be added to the existing Iowa DOT Agency type account.

To be added to the existing Iowa DOT Doc Express® account, you must contact either Jen Strunk, by emailing Jennifer.Strunk@iowadot.us or by calling (641) 344-0044, or Tyson Sickles, by emailing Tyson.Sickles@iowadot.us or by calling (515) 290-1046.

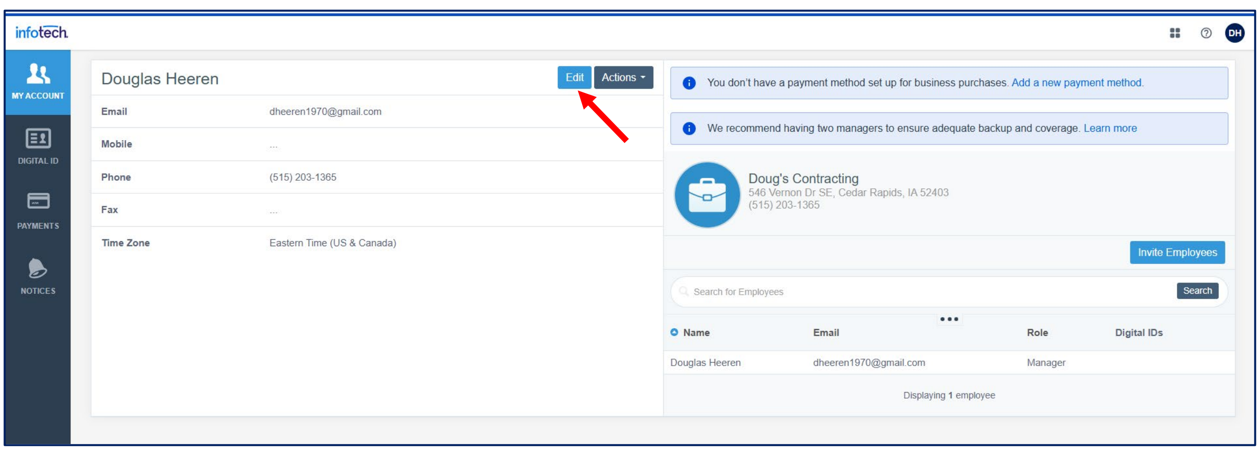
Disabling Your Doc Express® Account

Occasionally, it may become necessary to disable your Doc Express account. This typically occurs when a person leaves employment from an agency or company, or if they need to be added to a different Doc Express® account using the same email address associated with their current Doc Express® account. **Note: Only one unique email address can be added per Doc Express® account.**

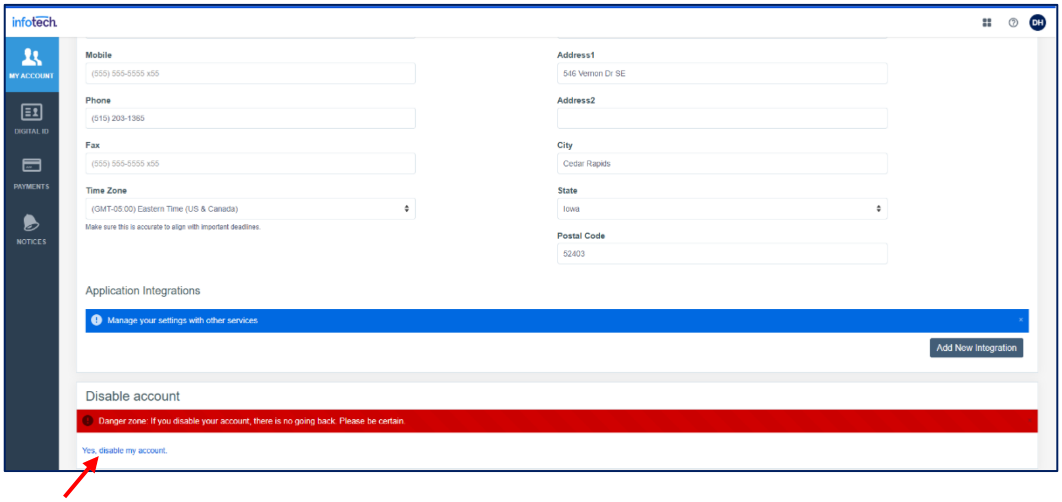
To disable your Doc Express® account, login to Doc Express® and click on the black ball, with your initials inside of it, to access Account Settings.

When the small screen expands, choose the option for Account Settings.

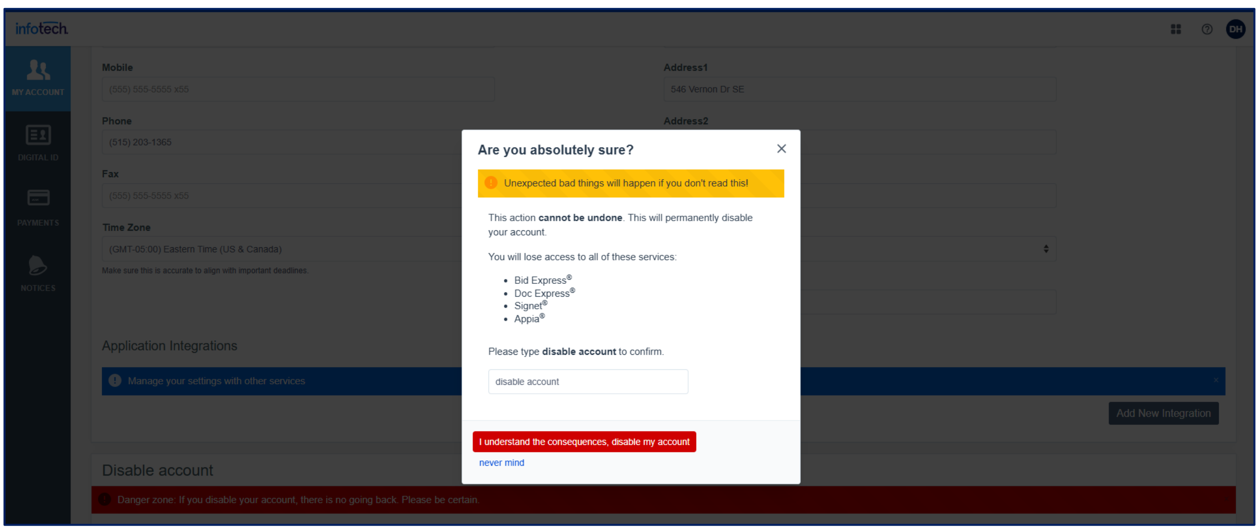
When the Account Settings screen opens, choose the option to Edit.



Scroll to the bottom of the screen. You will see the option to disable your account. As noted in the red warning ribbon, there is no going back once you have disabled the account. If you are certain you need to disable your account, click on the blue text 'Yes, disable my account' at the bottom of the screen.



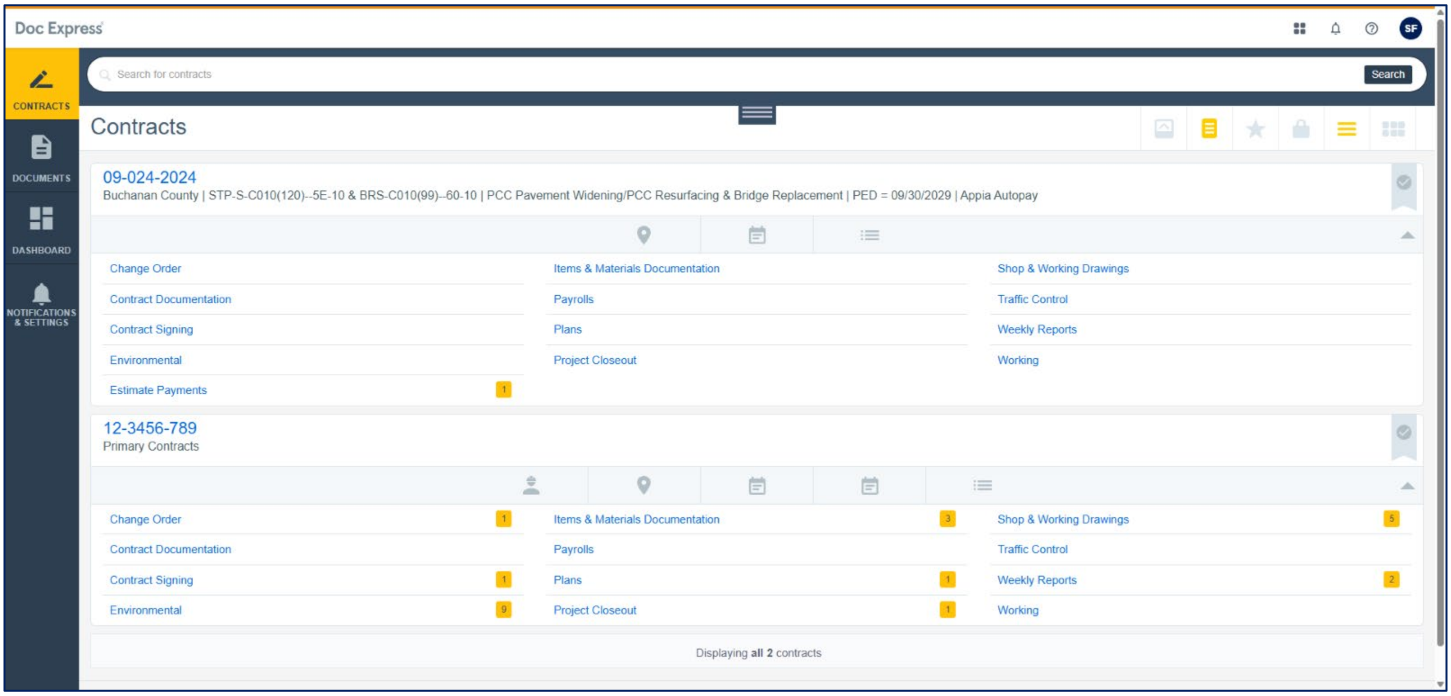
You will be provided one more chance to change your mind on disabling your account. Type the words “disable account” in the box to proceed. Then click on the option “I understand the consequences, disable my account”.



Your account is now disabled. Your email address that was associated with the account can now be sent an invitation to join a different Doc Express® account, or it can remain permanently disabled.

Contracts Overview Screen

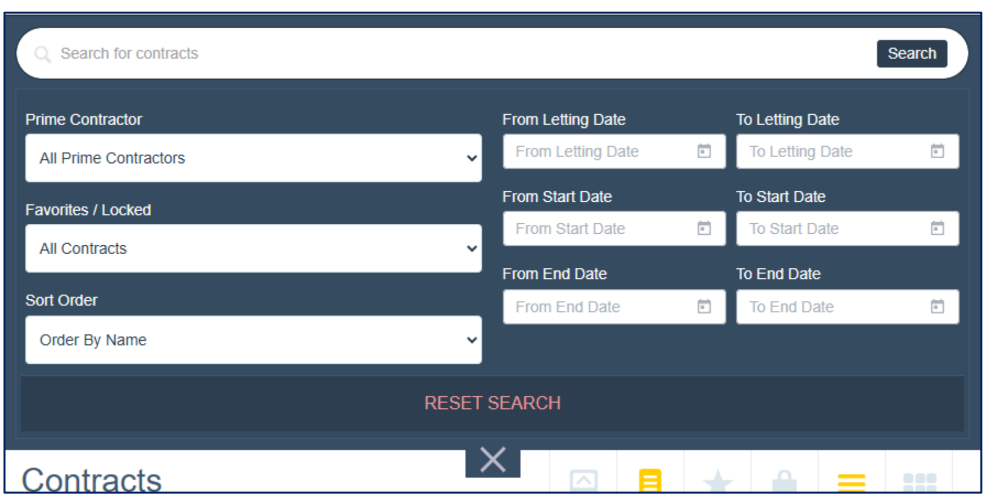
When you log in to Doc Express®, you are presented with the **Contracts Overview** screen. This is the central hub where all contracts you have access to are listed. Each contract is displayed as an individual tile or row (depending on your selected view mode), providing key details and quick access to associated documents.



Search Bar

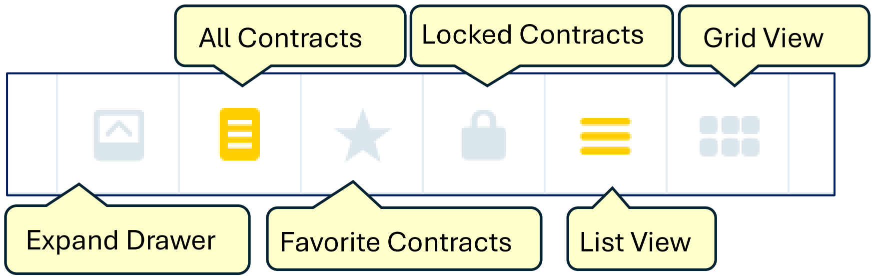
Located at the top center of the page is the search bar. Use this tool to quickly find a specific contract by typing keywords, contact numbers, or project names.

Click the three stacked lines icon directly beneath the Search bar to reveal additional filter options. This expands a detailed filtering panel to narrow down the contract list based on various parameter.



Toolbar

Located in the top-right corner of the screen, this toolbar allows you to customize how contracts are displayed and filtered.



Icon Functions (From Left to Right):

- **Expand Drawers**
  Click this to expand or collapse all drawers within each contract tile, allowing you to preview the available document sections at a glance.

- **All Contracts**
  Displays every contract you have access to, regardless of status.

- **Favorite Contracts**
  Displays only those contracts that have been marked as favorites. To mark a contract as a favorite, locate the checkmark icon at the far right of the contract title. Click the icon; it will turn yellow, indicating the contract is now a favorite. Favorite contracts will automatically appear at the top of the list. To remove a contract from the favorites list, click the yellow checkmark again. The contract will return to its original position in the list (sorted numerically, then alphabetically).

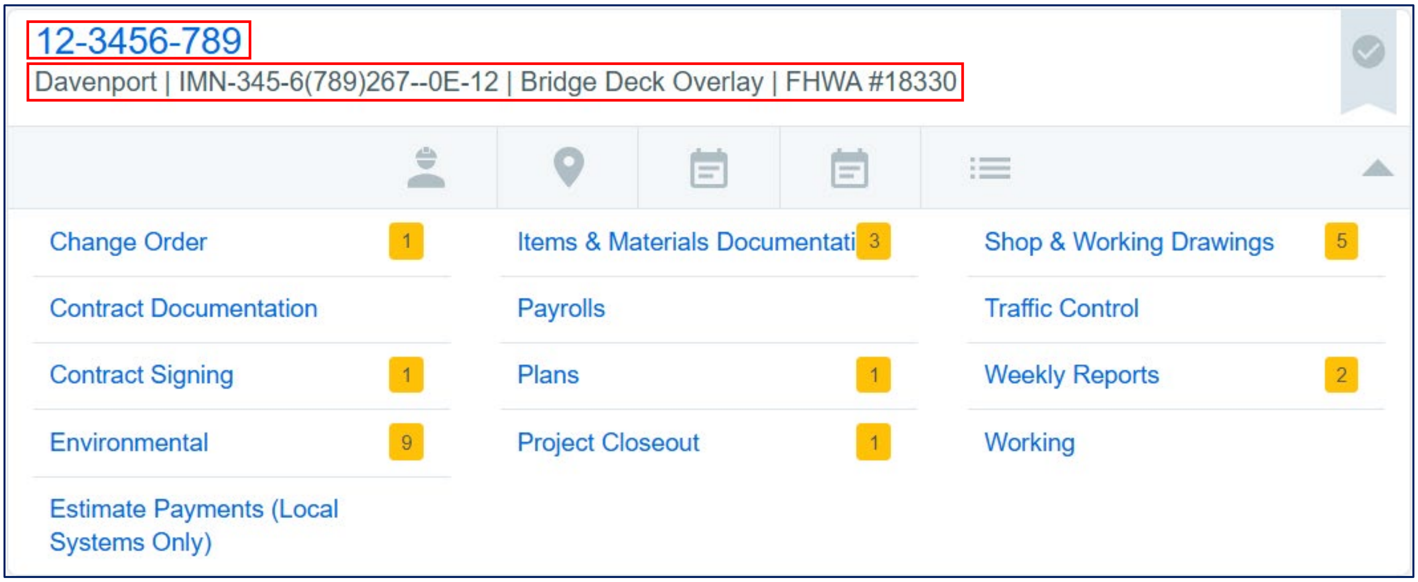
- **Locked Contracts**
  Displays only contracts that have been locked (usually indicating they are completed or no longer active).

- **List View**
  Shows contracts in a vertical, scrollable list format.

- **Grid View**
  Displays contracts in a block or tile layout.

Contract Information

Each contract tile on the Contracts screen contains key identifiers and project details presented in a structured format. This section explains how to interpret the contract tile and what information it displays.



Contract Header

- **Contract ID**: Displayed on the first line. Format follows cc-nnnn-ppp, where:
  - cc = County number
  - nnnn = **For Local Systems** it displays county code (starting with C0) or a four-digit city code. **For Primary Systems** it displays a three-digit route number followed by a sequence number (i.e. number of projects on that route).
  - ppp = Project number (paren number) of the lead project
- **Project Name**: The second line includes additional information specific to the contract. If multiple projects are linked on the same contract, all associated project numbers will be shown.

Hover Icons

Beneath the contract ID and title, four icons may appear. Hover the cursor over these icons to view additional metadata:

- **Prime Contractor** – Name of the primary contractor responsible for the project.
- **Location** – Where the construction work is to be performed.
- **Letting Date** – Date the contract was let.
- **Bid Order Number** – The bid order number assigned during the letting process.

Drawers Section

Each contract displays a set of **drawers**, which are categories for organizing project documentation. These drawers are only visible to users who have been granted access. The set of drawers may vary depending on your role and the type of project.

Badge Indicators

- A **yellow badge** next to a drawer name indicates the number of documents in that drawer awaiting action or transition.

- For example, a 2 badge beside "Weekly Reports" means two documents are present and unprocessed in that drawer.

Locked Contracts

When a contract has had the final payment issued, and no additional documents are anticipated to be uploaded to Doc Express® for that contract, the contract can be Locked (archived). When a contract is locked, it is placed in a different section within Doc Express®. This helps reduce clutter in your active contracts view.

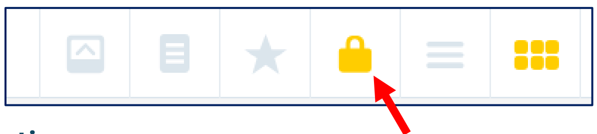
Finding Locked Contracts

There are two methods that can be utilized to find and view your locked contracts.

Using Screen Toggles

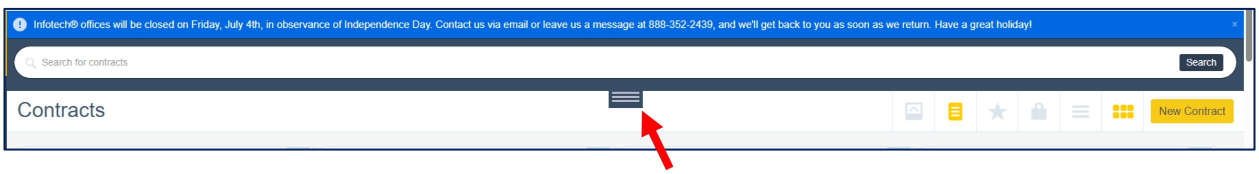
Utilize the screen toggles found on the top right of the Doc Express contract overview screen.

Click on the padlock symbol to view your locked contracts.

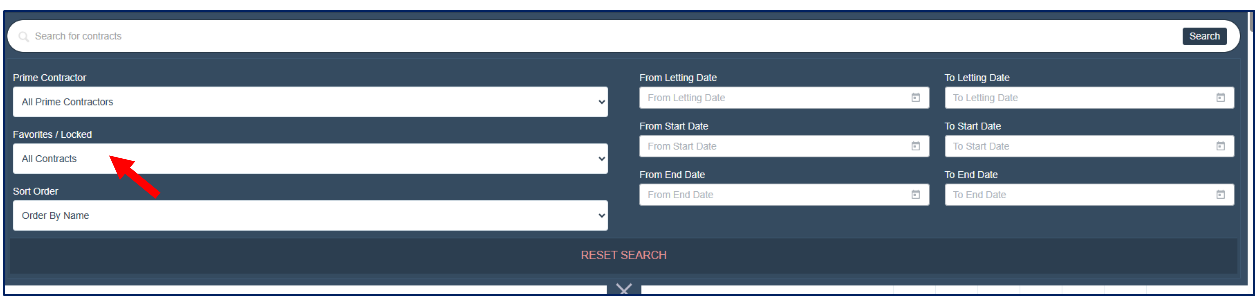


Using the Search and Filter Options

Utilize the search and filter options found on the top center of the contract overview screen.



When you filter screen is expanded by clicking on the three stacked lines, you have the option to filter by All Contracts, Favorite Contracts, and Locked Contracts.



If you choose the option for Locked Contracts, you will be taken to that section of Doc Express.

If you are searching for a specific Contract ID number, you can type it in the Search bar. You can also further filter your Locked contracts by using the other filter options available.

In the locked contracts section, you can access and view the same documents that you could when the contract was in the "active" side of Doc Express®. You can also print or export files from the locked contract. However, you will not be able to upload any files to a contract that has been locked. If you realize that a file should be uploaded to a contract after it has been locked, please contact:

Local Systems: Derek Peck by emailing Derek.Peck@iowadot.us or by calling (515) 239-1391

Primary: Jen Strunk, by emailing Jennifer.Strunk@iowadot.us or by calling (641) 344-0044, or Tyson Sickles, by emailing Tyson.Sickles@iowadot.us or by calling (515) 290-1046

They will be able to unlock the contract for you so you can upload the additional file(s). Please notify Derek, Jen, or Tyson when you are done uploading the additional file(s) so they can relock the contract.

Returning to Active Contracts

To return to your active contracts view, there are two options.

Using Screen Toggles

Click on any of the other symbols found in the same area as the padlock for accessing Locked contracts. The different symbols will provide a different type of view of your active contracts, or your Favorite contracts, per your view preference.

Using the Search and Filter Options

Change your filter from Locked Contracts to either Favorite Contracts or All Contracts. Also, remove any specific data you typed in the Search bar.

How to Request a Contract to be Locked

Primary: Jen Strunk or Tyson Sickles will automatically lock contracts upon notification from Central Construction that a contract is ready to be closed.

Local Systems: The project engineer, local agency personnel, and/or the Local Systems Field Technician/Grant Teams Project Manager should reach out to Derek Peck, by emailing Derek.Peck@iowadot.us or by calling (515) 239-1391, to request a contract(s) to be locked. Please include the Contract ID Number with your request.

Upon receiving your request, Derek will:

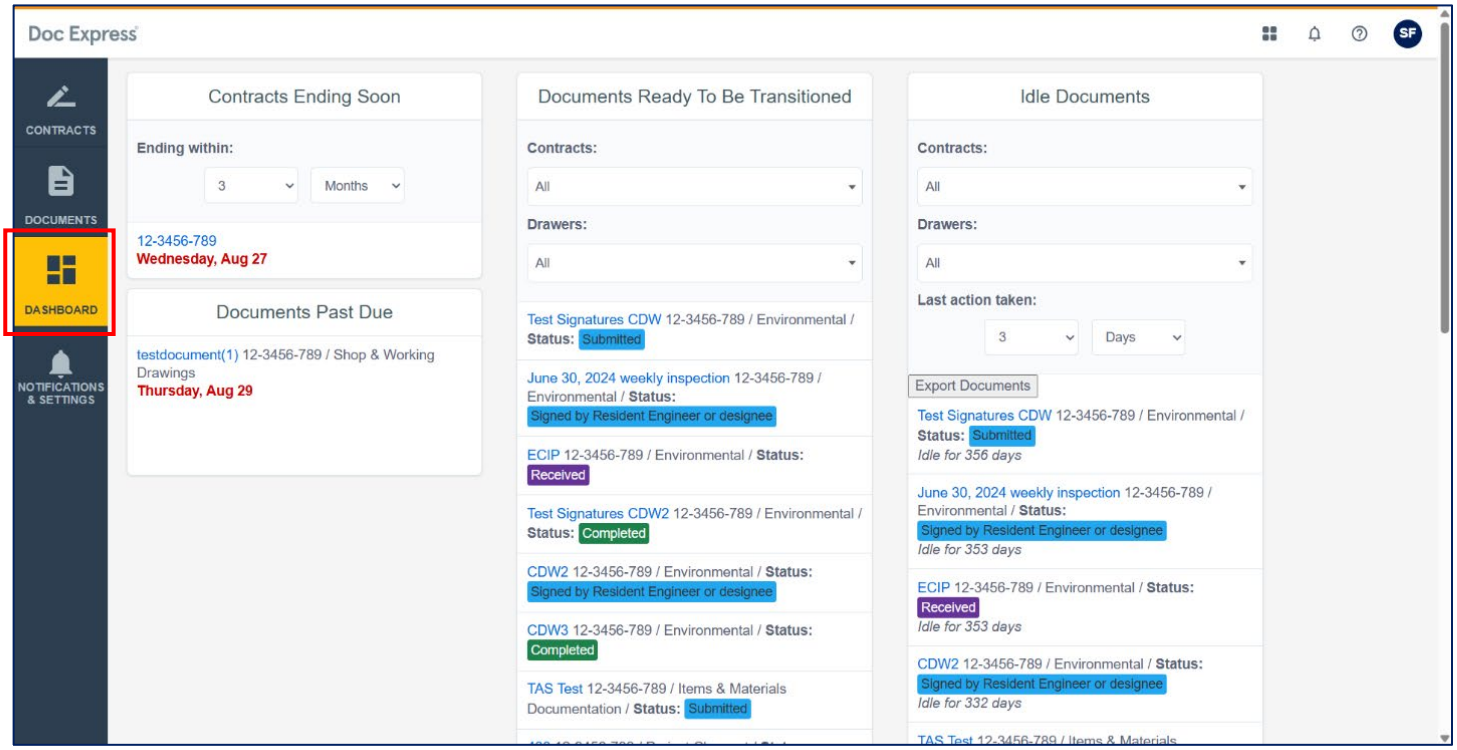
Lock Requests from Project Engineer & Local Agency Personnel: Contact the Local Systems Field Technician/Grant Team Project Manager to have them verify that they are done uploading documents for that contract.

Lock Requests from Local Systems Field Technician/Grant Teams Project Manager: Contact the Local Agency to verify that they are done uploading documents for that contract.

Dashboard

The **Dashboard** provides a centralized summary of contract activity and document status. It allows users to quickly assess what requires attention across their assigned contracts.

To access the Dashboard, click the **Dashboard** icon from the left-hand navigation menu.



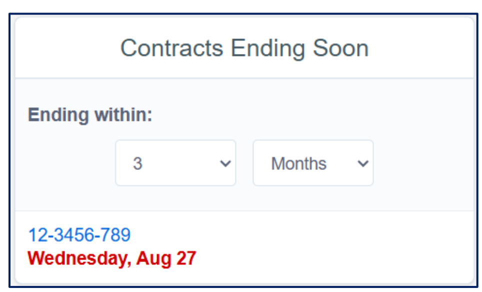
Dashboard Sections

The Dashboard consists of four main panels, each showing real-time updates:

1. Contracts Ending Soon

This panel shows contracts that are approaching their **Late Start Date** or designated end date.

- Use the dropdown filters to set a specific time range (e.g., “within 3 months”).
- Contract IDs are displayed in blue are clickable links that will take the user to that specific contract.
- End dates are prominently displayed in **red**.



2. Documents Ready To Be Transitioned

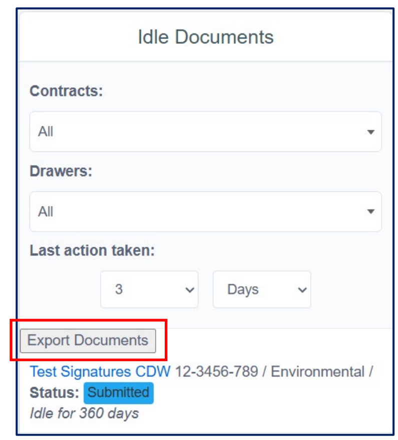
This panel shows documents in progress that are waiting for the next step in their workflow.

- By default, it includes all documents across all assigned contracts.
- Use dropdown filters to narrow by **Contract** or **Drawer**.
- Each entry includes document title, contract ID, drawer name and the status.

3. Idle Documents

This section shows documents or drawers that have not had any recent activity.

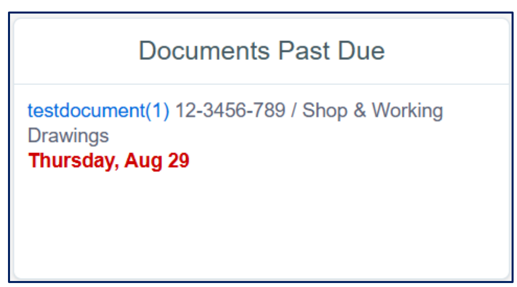
- Users can filter by **Contract**, **Drawer**, and **Inactivity Timeframe**.
- The panel displays the current **status** and **last action** date of each idle document.
- Documents are displayed in descending order starting with the highest number of idle days.
- The **Export Documents** button generates a list of documents matching the selected filters, which will be emailed to the user.



4. Documents Past Due

This section lists documents that have a due date and are now overdue.

- Only documents with due dates entered will appear in this list.
- Each item shows the document title, contract ID, drawer name, and overdue date (in red).
- Clicking the blue document title opens the item directly.



Contract Signing

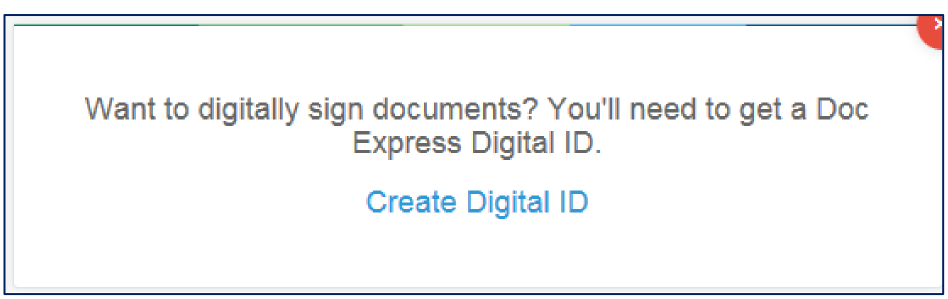
Drawer Structure

- The Contracts & Specifications Bureau will submit all documents to this drawer instead of mailing hard copies to the bid winner.
- Only the prime contractor is given access along with DOT users.
- Subcontractors and suppliers are not, by default, given access to this drawer.
- The bond is verified, and the contract is signed here.
- (Primary contracts only) If there is a storm water co-permittee form, the prime verifies and then signs it here.
- All documents other than the contract and storm water co-permittee are left at the submittal status.
- This is the only drawer in Doc Express that requires a digital signature – BUT only the person who signs the contract will need one, no one else.
- The digital signature is only required to sign the contract and storm water co-permittee form but NOT to verify the performance bond.
- When you open this drawer, a wizard will help you through the process of getting a digital signature. If you don't need one, ignore the wizard. If you already have one, the wizard will disappear.

Submittal & Transitions

ONLY the prime contractor and certain DOT users are given access to this drawer.

It is very important that you turn on the Progressed Document notifications for all documents to which you have access for the Contract Signing drawer in order to know when the Contracts & Specification Bureau submits the contract. Even though you may already have had notifications set the way you want them, **it is really important for you to re-visit the notifications (Notifications button) and display the Contract Signing drawer in the "any drawers" field under the Progressed Document section.**



When you open the Contract Signing drawer, a wizard will help you obtain your digital ID if you do not have one already. **This Doc Express® digital ID is different from the Bid Express® digital ID**. If you do not need a digital ID, simply ignore the wizard.

If you do need a Doc Express digital ID, click on Create Digital ID and follow the wizard. You do not need to wait until you must sign the contract to obtain the digital ID – this is something you can do once you have access to the Contract Signing drawer. **You will not need to do this each time you open the drawer.** Once you have a digital ID, the wizard will disappear when you open this drawer**. You do need to renew your digital ID every 2 years**.

As part of getting your digital ID, you will be given a contractor number (business number) which you will need to furnish to your bonding company along with the contract ID. Once registered with Surety 2000, you will need to work with your bonding agent as part of verifying the performance bond within Doc Express®. Your bonding agent will then furnish you with a bond ID for the contract. This contractor number (business number) will be the same for future contracts but the bond ID is unique for each contract.

For contractors, there is a charge for doing business with Surety 2000. For Local Agencies needing to verify and sign the contractor's performance bond, there is no charge to register with Surety 2000.

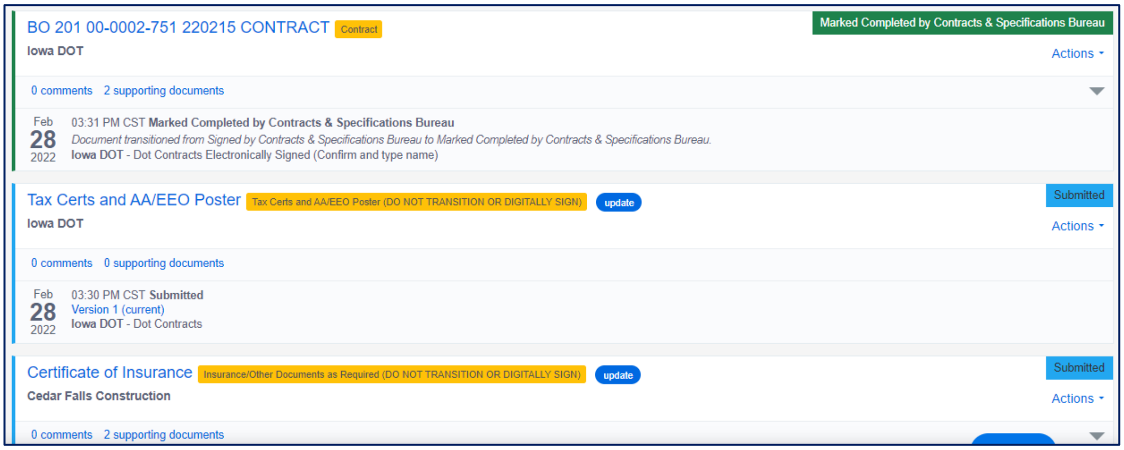
All contract documents are submitted to this drawer to be signed electronically instead of being mailed to the contractor.

There are limited types in this drawer. When you submit your insurance, the type you should select is "Insurance/Other Documents as Required (DO NOT TRANSITION OR DIGITALLY SIGN)".

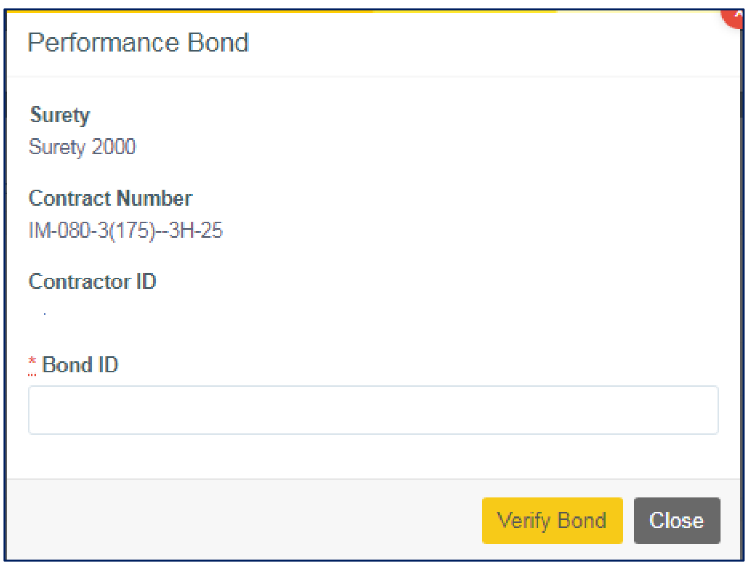
If there is a need to renew insurance:

- **For Primary**, that renewal must be emailed to Finance (dot.contractorpay-finance@iowadot.us). Do NOT try to submit to the Contract Signing drawer.
- **For Local Systems,** the renewal certificate must be uploaded to the Contract Documentation drawer. For projects being paid by Iowa DOT Finance (from a county's Farm-to-Market (FM) account), a copy of the renewal certificate must also be emailed to Finance (dot.contractorpay-finance@iowadot.us).

Once the contract has been signed, the prime's access to submit to this drawer is removed.



When the prime contractor is ready to sign the contract, they are required to verify the performance bond first. Click on **Verify Performance Bond** beside ONLY the submittals for the contract document and the storm water co-permittee, if applicable. You will need the bond ID which was furnished to you from your bonding agent. **Do not copy and paste the bond ID into the Doc Express® fields. Instead, type it in exactly as given (no spaces).** A screen similar to the one below will be displayed when you click Verify Performance Bond. During this step Power of Attorney and Performance Bond will be attached as supporting documents.



The words "Verify Performance Bond" are now replaced by "Transition". Click on the word Transition and select Verify Performance Bond from the dropdown list. Enter the bond ID and then click 'Verify Bond'. The first time you "verified the performance bond", you actually added the supporting documents; this time you are really verifying the bond, occasionally you may need to verify the bond more than one time.

After the bond has been verified, you will be able to digitally sign the contract by clicking on Transition once again, but this time by selecting Signed by Contractor from the dropdown list.

For Local Systems contracts, the local agency must receive the performance bond (Received by Local Public Agency) and sign the performance bond (Local Public Agency Views and Signs Performance Bond). The Local Agency will then be able to sign the contract (Local Public Agency Signs Contract).

Primary Contracts ONLY:

If there is a “Storm Water Co-Permittee” document in the drawer, you must verify the performance bond for it and then sign it. **This document and the contract are the only two submittals that need to have the performance bond verified and to be signed.**

Before the Contracts & Specification Bureau signs the contract, the prime contractor must not only sign the appropriate documents, but they must also submit a copy of their liability insurance, using a title of “Certificate of Insurance” and required RR insurance documents. Both of these documents will be linked to the “Insurance/Rail Road Insurance Documents (DO NOT TRANSITION OR DIGITALLY SIGN)” type.

The Tax Certs & AA/EEO Poster will be uploaded to the contract signing drawer for your use.

Local Agency Contracts:

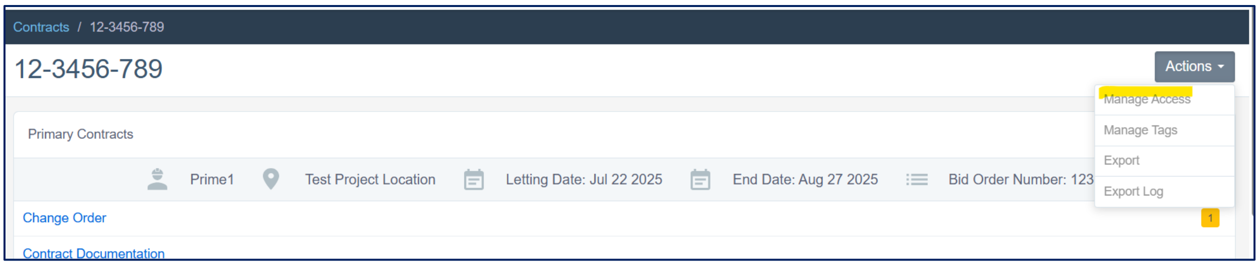
The Local Agency must download the Tax Certs and AA/EEO Poster from the Contract Signing drawer, sign the Tax Certs, then scan and upload the signed Tax Certs and AA/EEO Poster as ONE DOCUMENT to the Contract Documentation drawer.

Once the contract has been signed by all parties and marked Completed by the Contracts & Specification Bureau, the prime contractor will no longer have access to submit any documents to this drawer. They will still have the ability to see and to open all documents within the drawer.

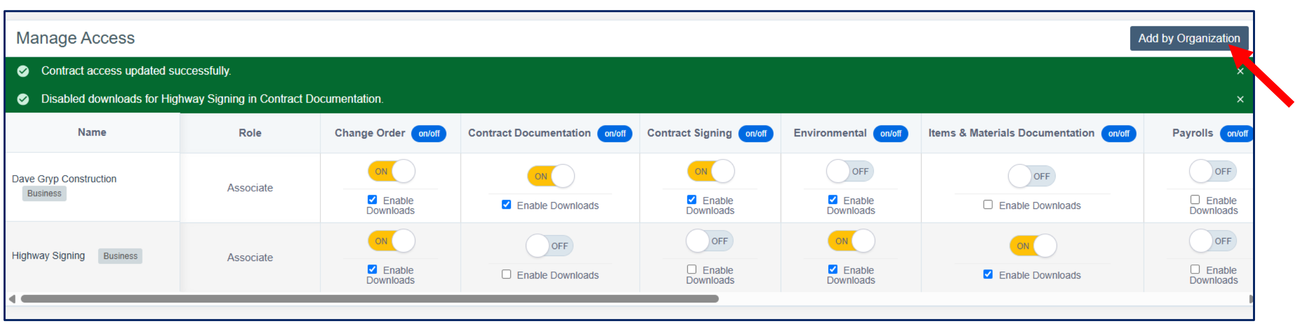
Managing Access

ONLY if you are a Prime Contractor –

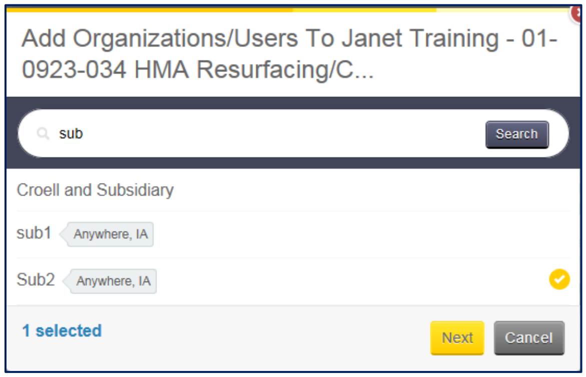
You as the prime contractor can give subcontractors and/or suppliers access to drawers in your contract. You can also enable them to download documents that your company submitted in any given drawer. You cannot give them permission to download documents that other organizations submitted. For that to happen, that company must enable downloading for them. This access is given on a drawer by drawer basis. The ability for one company to allow another organization to open their submittals can be given by any subcontractor or supplier, not just the prime contractor. Do so by opening the contract to which you want to give access and then clicking the Actions > Manage Access. (see below)



The Manage Access screen (Actions > Manage Access) as shown above will be displayed where you as the prime contractor can add, adjust, or remove access to drawers for subs and suppliers. If you want an organization to be allowed to download your company's submittals, on a drawer by drawer basis, click in the Enable Downloads for those drawers and companies. Any contractor or supplier can "Enable Downloads" if they wish.

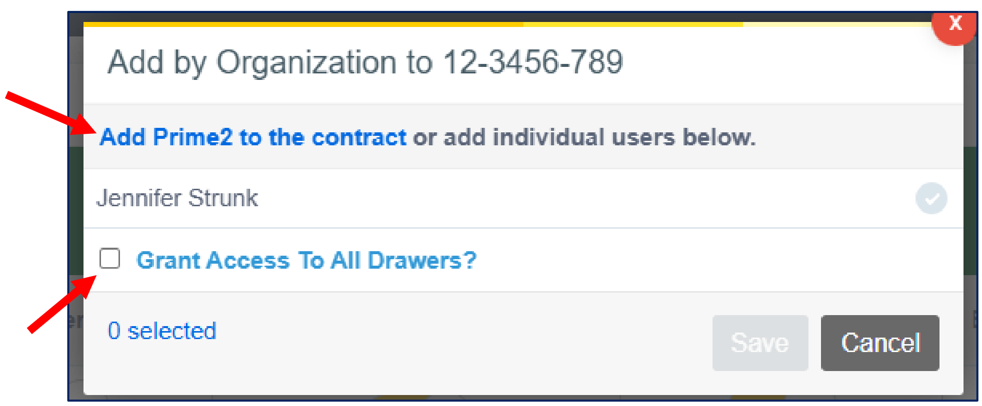


To give access to a new subcontractor or supplier, click the Add by Organization button and the following screen will be displayed where you enter the sub's or supplier's name or a partial name then click Search. All possibilities of that name will be listed. By clicking on the appropriate company name, they will be checked. Only the prime contractor can do this.



Once you have selected the contractor, click Next and the following screen will be displayed which lists all users (only 1 in this company) for that organization. You can give access to only certain users within that company or, the much preferred method, you can give access to the company as a whole. **Unless otherwise specifically requested, always give access to the company as a whole NOT to individuals within the company**. To give access to all users in the company at once, click on the company name rather than clicking on each individual within the company. If you want to give access to all users within a company, please do NOT click on each individual user's name within the company.

By giving access to the company rather than individual users within the company, as users are added to the company, they will immediately have access to all the same contracts as current users within the company. And if someone leaves, their access within the company can be removed which will automatically remove their access to all the company's contracts.



If you want to give them access to all drawers, put a checkmark in the Grant Access to All Drawers option. **EVERYONE should be given access to the Plans drawer. NO sub or supplier should be given access to the Change Order, Contract Signing, or Payrolls drawers.**

For Primary Contracts Only:

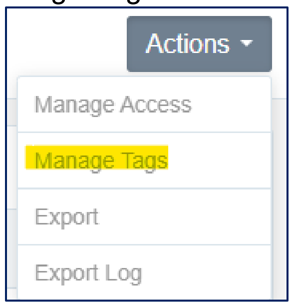
When the contract is initially set up in Doc Express, if the DOT has received the .CON file, they will provide access for the subs to all drawers except the Payrolls, Change Order, and Contract Signing and also check the Enable Downloads option so you can open all DOT submitted documents. If the DOT receive the .CON file after the contract has been signed or if there is a change/addition to the subs, the DOT will add them at that time. The prime has the right to change their subs' and suppliers' access if they so desire. To do so, click on Actions > Manage Access and make adjustments at that screen.

If you want to **remove a contractor** entirely from having access to the contract, click on the red x to the far right of the organization's name and confirm that you want to remove their access to the contract. If you delete an organization and they had already submitted documents, those documents will remain in the drawer and contract where they were originally submitted.

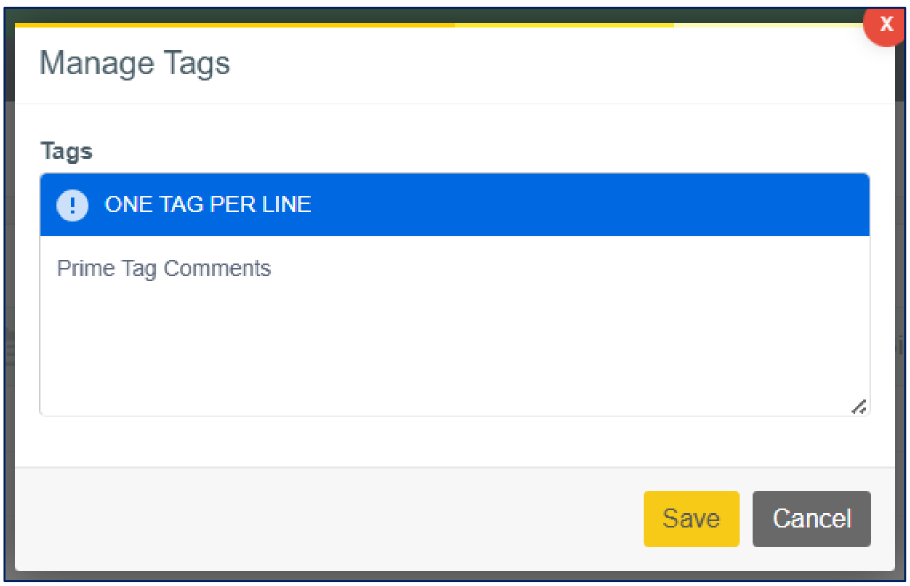
If a subcontractor or supplier should be added but they do not have anyone with access to the Doc Express program, they must first create an account and register as explained in the first few pages of this guide. **Only the first person in each new organization should register to get access to the Doc Express program.** Once someone in the company has registered, they should contact either the prime or Jen/Derek so the company can be given access to the contract and appropriate drawers. Once the first person has registered, that person should go to the Account Settings screen found by clicking the black ball with the user's initials in it and invite the rest of the users in that organization to join so they will have the same access to contracts and drawers.

Managing Tags

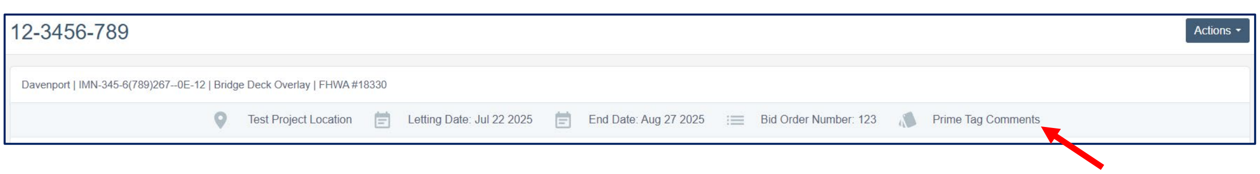
This field is strictly for non-DOT use, DOT users cannot even see this field when they view the contract. It is a free form field where data can be entered that distinguishes the contract for the contractor such as the job number. To enter a tag, click on Actions > Manage Tags.



Once you click on Manage Tags the following box will be displayed, you can enter your Tag information in this box. Once you give your Tag a name, click Save.



The tag field icon is displayed just to the right of the Bid Order Number icon. In the sample below, the prime entered "Prime Tag Comments" in the tag field. You can put more than one tag; they will show up one right after the other in the order they were entered.



Each company associated to this same contract can enter their own preference for a tag. Each company will see only their own tag when they open the contract. Different users; however, within the same company cannot have their own unique tag for the same contract. The tag field is company specific, not user specific but since there can be multiple tags, different users can add their own tag which will be displayed along with the others entered.

Exporting Contracts and Drawers

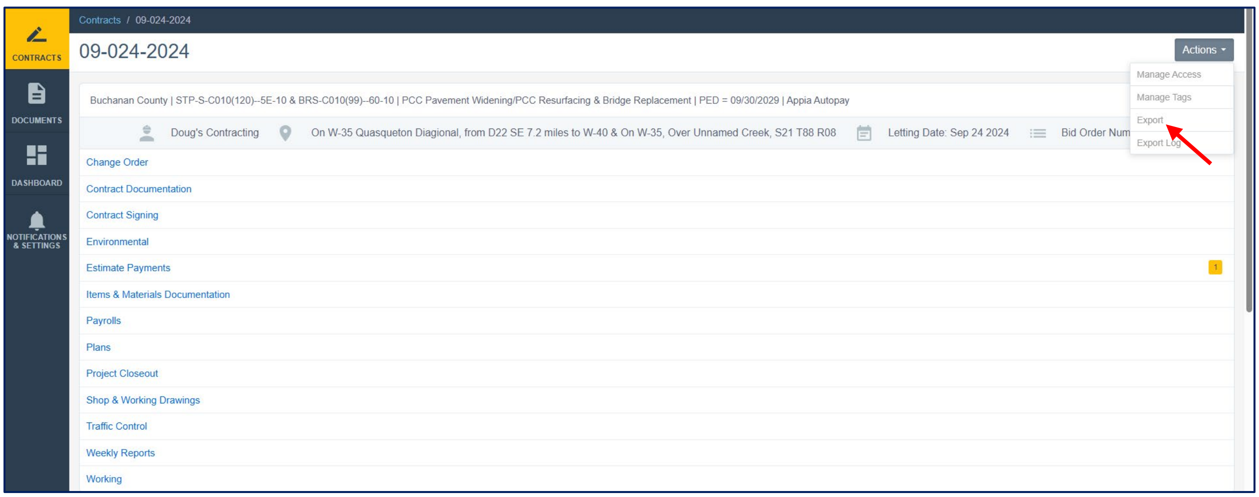
Doc Express® users have the option to export files from Doc Express® so the files can be stored locally. Users have the option to download all files uploaded for a contract or select files from within a contract Drawer.

When an export is generated from within Doc Express®, the user will receive an email from Doc Doc Express® that includes a link to a .zip file. Upon opening the .zip file, the user will see the exported items that were requested. The exported file will contain the files including their title as they appear in Doc Express. The exported files that can be stored locally and/or shared with others.

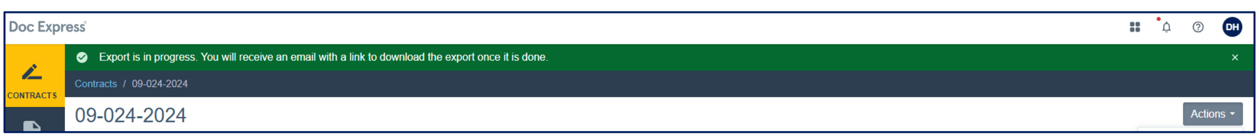
Users have the option to export an entire contract, or specific drawers within a contract.

Export Entire Contract

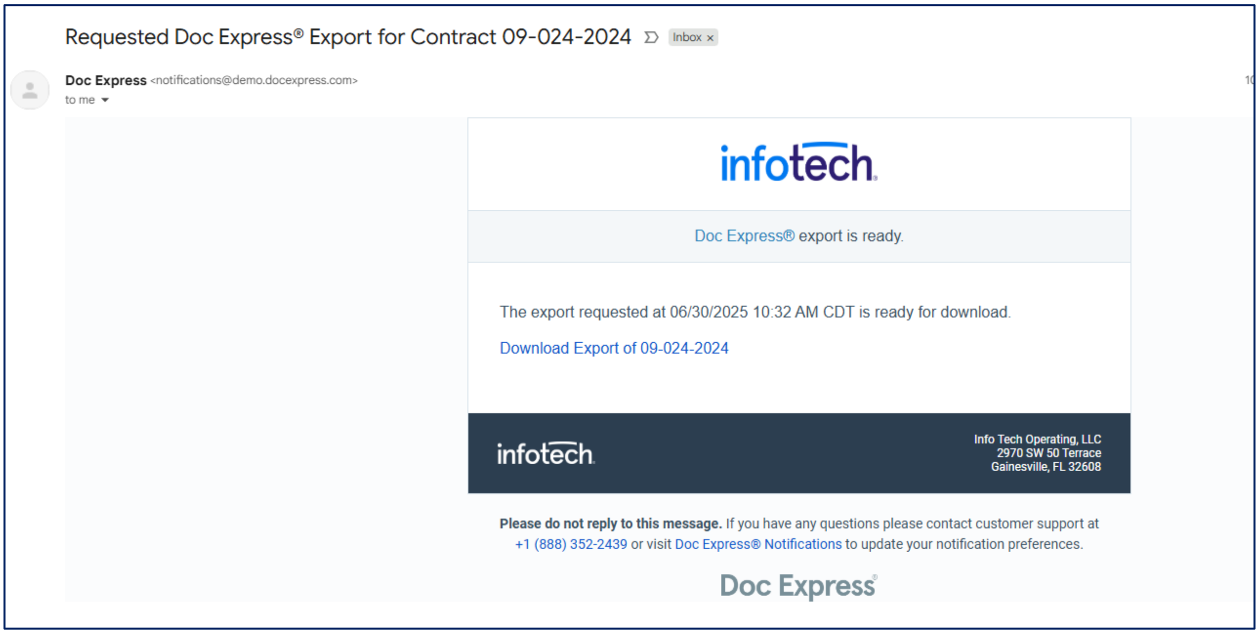
To export an entire contract's files, open the contract and click on the gray Actions drop down on the right edge, then choose the option for Export.



You will see a green ribbon appear along the top of Doc Express® confirming that the export is in progress.

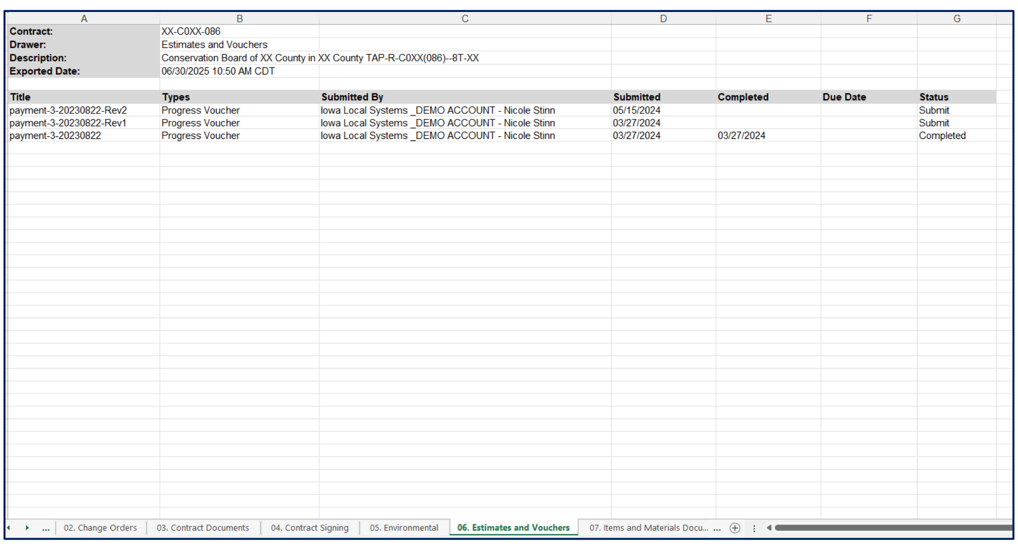


You will subsequently receive an email from Doc Express® that includes a link to a .zip file that contains all documents uploaded for that contract.



Contract Export Log

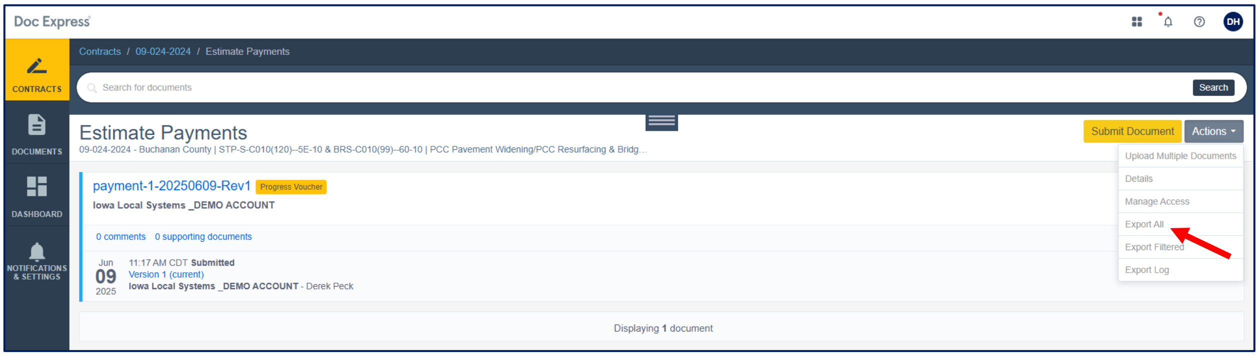
Under the same gray Actions drop down, there is an option for Export Log. This log provides a summary of every document uploaded for the contract, including the file Title, Type, Submitted By, date Submitted, Date Completed, and the file Status at the time of export. The various Doc Express® drawers are separately tabbed along the bottom of the Excel spreadsheet.



A	B	C	D	E	F	G
Contract:	XX-C0XX-086					
Drawer:	Estimates and Vouchers					
Description:	Conservation Board of XX County in XX County TAP-R-C0XX(086)--8T-XX					
Exported Date:	06/30/2025 10:50 AM CDT					
Title	**Types**	**Submitted By**	**Submitted**	**Completed**	**Due Date**	**Status**
payment-3-20230822-Rev2	Progress Voucher	Iowa Local Systems _DEMO ACCOUNT - Nicole Stinn	05/15/2024			Submit
payment-3-20230822-Rev1	Progress Voucher	Iowa Local Systems _DEMO ACCOUNT - Nicole Stinn	03/27/2024			Submit
payment-3-20230822	Progress Voucher	Iowa Local Systems _DEMO ACCOUNT - Nicole Stinn	03/27/2024	03/27/2024		Completed

Export Drawer Contents

If you prefer, you can export files from a specific Drawer in Doc Express®. To do so, open any Drawer within a contract and click on the gray Actions dropdown, then choose the option for Export All.



The same process as noted above will occur where you will receive an email from Doc Express® that includes a link to a .zip file that contains the files from the chosen Drawer.

Note: If there were supporting documents uploaded for a file within that drawer, they will be included with the .zip file, however, they are found within a separate folder within the .zip file.

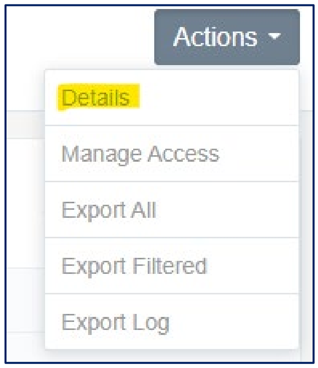
Name	Type	Compressed size	Password ...	Size	Ratio	Date modified
supporting documents	File folder					
PR 001 WE 220305 - Version 1 cu...	Adobe Acrobat Document	99 KB	No	106 KB	7%	6/30/2025 11:38 AM
PR 001 WE 220305 - Version 1 cu...	Adobe Acrobat Document	741 KB	No	744 KB	1%	6/30/2025 11:38 AM
PR 001 WE 220319 - Version 1 cu...	Adobe Acrobat Document	82 KB	No	88 KB	7%	6/30/2025 11:38 AM
PR 001 WE 220409 - Version 1 cu...	Adobe Acrobat Document	65 KB	No	69 KB	7%	6/30/2025 11:38 AM
PR 001 WE 220409 - Version 1 cu...	Adobe Acrobat Document	81 KB	No	85 KB	6%	6/30/2025 11:38 AM
PR 001 WE 220702 - Version 1 cu...	Adobe Acrobat Document	368 KB	No	371 KB	1%	6/30/2025 11:38 AM
PR 001 WE 220709 - Version 1 cu...	Adobe Acrobat Document	774 KB	No	782 KB	2%	6/30/2025 11:38 AM
PR 001 WE 220709 - Version 1 ol...	Adobe Acrobat Document	137 KB	No	149 KB	9%	6/30/2025 11:38 AM
PR 001 WE 220709 - Version 2 cu...	Adobe Acrobat Document	174 KB	No	183 KB	5%	6/30/2025 11:38 AM
PR 001 WE 220730 - Version 1 cu...	Adobe Acrobat Document	102 KB	No	111 KB	9%	6/30/2025 11:38 AM
PR 001 WE 220813 - Version 1 cu...	Adobe Acrobat Document	102 KB	No	111 KB	9%	6/30/2025 11:38 AM
PR 001 WE 221015 - Version 1 cu...	Adobe Acrobat Document	59 KB	No	61 KB	4%	6/30/2025 11:38 AM

Drawer Export Log

Under the same gray Actions drop down within a Doc Express® Drawer, you can choose an option for Export Log. This log is similar to the above described Contract Export Log except the log will only be provided for the documents located within the chosen Drawer.

Drawer Workflow

There is a specific workflow for each drawer. This shows what steps must be taken for each file that is uploaded to Doc Express®. To find the workflow, open the drawer and then click Actions > Details.



The workflow defines the different document statuses available in each drawer, what type of user can execute each step in the workflow, whether or not each step is required or optional, and whether or not a signature is required for each step.

Below are some examples of the workflows showing each step along the way and the color code of the status. Due to the inherent differences in contract administration between Primary and Local Agency contracts, there are differences in the workflows.

Contract Signing

Primary

Once the contract has been marked Completed by the Contract & Specifications Bureau, the prime contractor is removed from the Submitted step in the workflow for this drawer so additional submittals can not be made to the drawer.

Status	Executed By	Signature	Required?	Allow Document Replacement?	Allow Markup?	Move?	Copy?	Bond Validation?
Submit	Agency Managers, Primes	No signature required	Yes	No	No	No	No	No
Local Public Agency Awards Contract	Agency Managers	No signature required	Yes	No	No	No	No	No
Contractor Verifies Performance Bond	Primes	No signature required	Yes	No	No	No	No	No
Signed by Contractor	Primes	User types name and selects check box to confirm electronic signature	Yes	No	No	No	No	No
Received by Local Public Agency	Agency Managers	No signature required	Yes	No	No	No	No	No
Local Public Agency Views and Signs Performance Bond	Agency Managers	No signature required	Yes	No	No	No	No	No
Local Public Agency Signs Contract	Agency Managers	User types name and selects check box to confirm electronic signature	Yes	No	No	No	No	No
Checked by Contracts and Specifications Bureau	Agency Managers	User types name and selects check box to confirm electronic signature	Yes	No	No	No	No	No
Signed by Contracts and Specifications Bureau	Agency Managers	User types name and selects check box to confirm electronic signature	Yes	No	No	No	No	No
Marked Completed by Contracts and Specifications Bureau	Agency Managers	User types name and selects check box to confirm electronic signature	Yes	No	No	No	No	No

Local Agency

Once the contract has been Marked Completed by the Contract & Specifications Bureau, the prime contractor is removed from the Submit step in the workflow for this drawer so additional submittals can be made to the drawer.

Document Workflow Order

Status	Executed By	Signature	Required?	Allow Document Replacement?	Allow Markup?	Move?	Copy?	Bond Validation?
Submitted	Agency Managers, Contract Signing, Primes	No signature required	Yes	No	No	No	No	No
Verify Performance Bond	Primes	No signature required	Yes	No	No	No	No	Yes
Signed by Contractor	Primes	User types name and selects check box to confirm electronic signature	No	No	No	No	No	No
Checked by Contracts & Specifications Bureau	Agency Managers, Contract Signing	User types name and selects check box to confirm electronic signature	No	No	No	No	No	No
Signed by Contracts & Specifications Bureau	Agency Managers, Contract Signing	User types name and selects check box to confirm electronic signature	No	No	No	No	No	No
Marked Completed by Contracts & Specifications Bureau	Agency Managers, Contract Signing	User selects check box to confirm electronic signature	Yes	No	No	No	No	No

Project Closeout

Primary

Signatures required on all documents submitted

Status	Executed By	Signature	Required?	Allow Document Replacement?	Allow Markup?	Move?	Copy?	Bond Validation?
Submitted	Agency Managers, Agency Users, Associates, Primes	No signature required	Yes	No	Yes	No	No	No
Signed by Resident Engineer or designee	Agency Managers, Agency Users	User types name and selects check box to confirm electronic signature	No	Yes	Yes	No	No	No
Signed by Contractor	Primes	User types name and selects check box to confirm electronic signature	No	No	Yes	No	No	No
Signed by District Construction Engineer or designee	Agency Managers, Agency Users	User types name and selects check box to confirm electronic signature	No	Yes	Yes	No	No	No
Signed by District Materials Engineer or designee	Agency Managers, Agency Users	User types name and selects check box to confirm electronic signature	No	Yes	Yes	No	No	No
Signed by Central Construction Engineer or designee	Agency Managers, Agency Users	User types name and selects check box to confirm electronic signature	No	Yes	Yes	No	No	No
Completed	Agency Managers, Agency Users	User selects check box to confirm electronic signature	Yes	No	No	No	No	No

Local Agency

Signatures required on all documents submitted

Status	Executed By	Signature	Required?	Allow Document Replacement?	Allow Markup?	Move?	Copy?	Bond Validation?
Submit	Agency Users, Primes	No signature required	Yes	No	No	No	No	No
Approved by Contractor (Optional)	Agency Users, Primes	User types name and selects check box to confirm electronic signature	No	No	No	No	No	No
Recommended by Engineer	Agency Users, Reviewers	User types name and selects check box to confirm electronic signature	Yes	No	No	No	No	No
Approved by PIRC (when applicable)	Agency Users	User types name and selects check box to confirm electronic signature	No	No	No	No	No	No
Approved by District Materials Engineer (Optional)	Agency Users, Reviewers	User types name and selects check box to confirm electronic signature	No	Yes	No	No	No	No
Approved by Administering Office	Agency Users, Reviewers	User types name and selects check box to confirm electronic signature	No	Yes	No	No	No	No
Approved by FHWA (when applicable)	Agency Users	User types name and selects check box to confirm electronic signature	No	No	No	No	No	No
Completed	Agency Users, Reviewers	No signature required	Yes	No	No	No	No	No

Environmental

Primary

Signatures are not required on all documents, only on Storm Water Inspection Reports

Status	Executed By	Signature	Required?	Allow Document Replacement?	Allow Markup?	Move?	Copy?	Bond Validation?
Submitted	Agency Managers, Agency Users, Primes	No signature required	Yes	No	No	No	No	No
Signed by Contractor	Primes	User types name and selects check box to confirm electronic signature	No	No	No	No	No	No
Signed by Resident Engineer or designee	Agency Managers, Agency Users	User types name and selects check box to confirm electronic signature	No	No	No	No	No	No
Received	Agency Managers, Agency Users	No signature required	No	No	No	No	No	No
Completed	Agency Managers, Agency Users	No signature required	Yes	No	No	No	No	No

Local Agency

Status	Executed By	Signature	Required?	Allow Document Replacement?	Allow Markup?	Move?	Copy?	Bond Validation?
Submit	Agency Users, Associates, Primes	No signature required	Yes	No	No	No	No	No
Received	Agency Users	No signature required	Yes	No	No	No	No	No

Items & Materials Documentation

Primary

Status	Executed By	Signature	Required?	Allow Document Replacement?	Allow Markup?	Move?	Copy?	Bond Validation?
Submitted	Agency Managers, Agency Users, Associates, Primes	User selects check box to confirm electronic signature	Yes	No	Yes	No	No	No
Received	Agency Managers, Agency Users	User selects check box to confirm electronic signature	No	Yes	Yes	No	No	No
Mtls Reviewed	Agency Managers, Agency Users	No signature required	Yes	No	No	No	No	No
RCE Audited	Agency Managers, Agency Users	No signature required	No	No	No	No	No	No
District Audited	Agency Managers, Agency Users	No signature required	No	No	No	No	No	No
Materials Audited	Agency Managers, Agency Users	No signature required	Yes	No	No	No	No	No

Local Agency

Status	Executed By	Signature	Required?	Allow Document Replacement?	Allow Markup?	Move?	Copy?	Bond Validation?
Submit	Agency Users, Associates, Primes	No signature required	Yes	No	No	No	No	No
Materials Reviewed	Agency Users	No signature required	No	No	No	No	No	No
Received	Agency Users	No signature required	Yes	No	No	No	No	No
Audit by DOT Materials	Agency Users, Reviewers	No signature required	No	No	No	No	No	No
Audit by DOT Administering Bureau	Agency Users, Reviewers	No signature required	No	No	No	No	No	No

Contract Documentation

Primary

Document Workflow Order

Status	Executed By	Signature	Required?	Allow Document Replacement?	Allow Markup?	Move?	Copy?	Bond Validation?
Submitted	Agency Managers, Agency Users, Associates, Primes	No signature required	Yes	No	No	No	No	No
Received	Agency Managers, Agency Users	No signature required	Yes	No	No	No	No	No

Local Agency

Status	Executed By	Signature	Required?	Allow Document Replacement?	Allow Markup?	Move?	Copy?	Bond Validation?
Submit	Agency Users, Associates, Primes	No signature required	Yes	No	No	No	No	No
Materials Reviewed	Agency Users	No signature required	No	No	No	No	No	No
Received	Agency Users	No signature required	Yes	No	No	No	No	No
Audit by DOT Materials	Agency Users, Reviewers	No signature required	No	No	No	No	No	No
Audit by DOT Administering Bureau	Agency Users, Reviewers	No signature required	No	No	No	No	No	No

Traffic Control

Primary

Document Workflow Order

Status	Executed By	Signature	Required?	Allow Document Replacement?	Allow Markup?	Move?	Copy?	Bond Validation?
Submitted	Agency Managers, Agency Users, Associates, Primes	User selects check box to confirm electronic signature	Yes	No	No	No	No	No
Received	Agency Users	No signature required	Yes	No	No	No	No	No

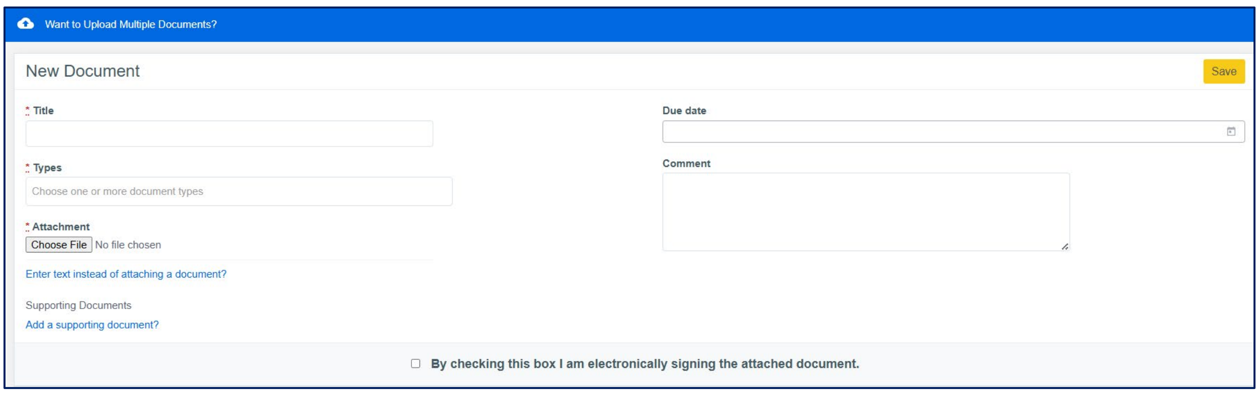
Local Agency

Status	Executed By	Signature	Required?	Allow Document Replacement?	Allow Markup?	Move?	Copy?	Bond Validation?
Submit	Agency Users, Associates, Primes	No signature required	Yes	No	No	No	No	No
Received	Agency Users	No signature required	Yes	No	No	No	No	No
Audit by DOT Administering Bureau	Agency Users, Reviewers	No signature required	No	No	No	No	No	No

Document Submittals

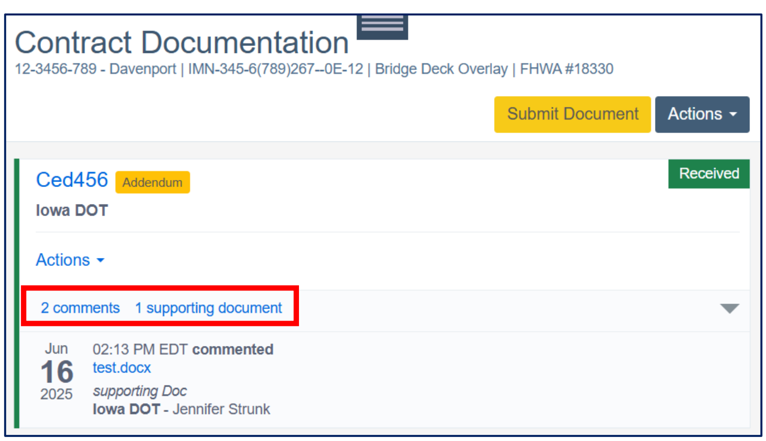
To Submit an individual document, click on the Submit Document button in the top right corner of the selected drawer.

You will then have the ability to add one individual document, you should see a screen similar to the one below. You will need to give your submittal a title of your choice, for Local Systems you will need to use their preferred naming convention, located in the Appendix. Choose a Type, you will then have the option to choose your file to upload.



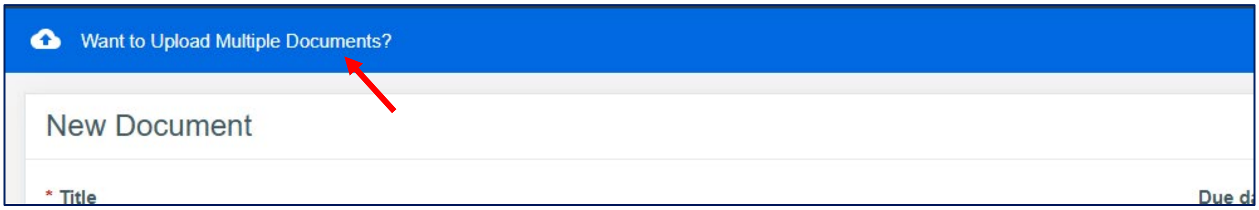
On the right side of the screen, you will see a Due Date text box. **We strongly discourage the use of due dates**. After the date has been entered and saved, it becomes a part of the activity log for that submittal. The due date may be changed several times but each time it is changed that activity will be included in the log for that document. The due date and other details are displayed below the title of the document when viewing the submittals for a drawer.

When submitting a document, you have an option to make a comment and to add supporting documents in a drawer. A supporting document is simply additional documentation for the original submittal. If there is a supporting document added, it will be included in the log when viewing the list of documents. Also, the number of supporting documents for that submittal will be displayed under the title of that document.

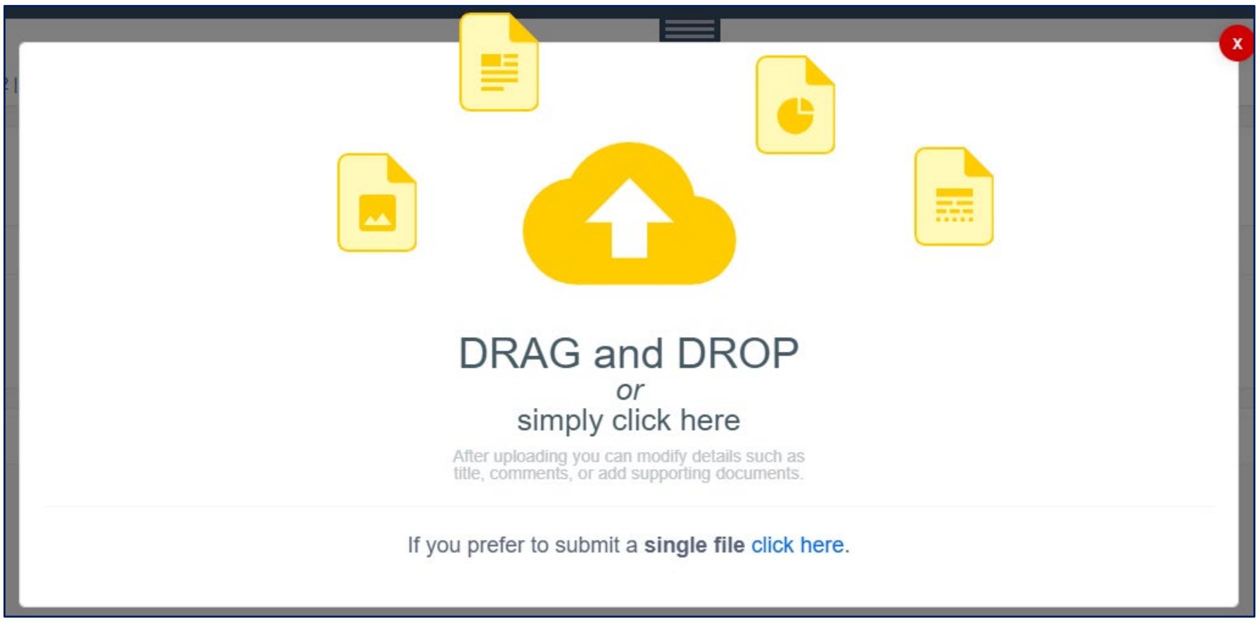


Submitting Multiple Documents at The Same Time

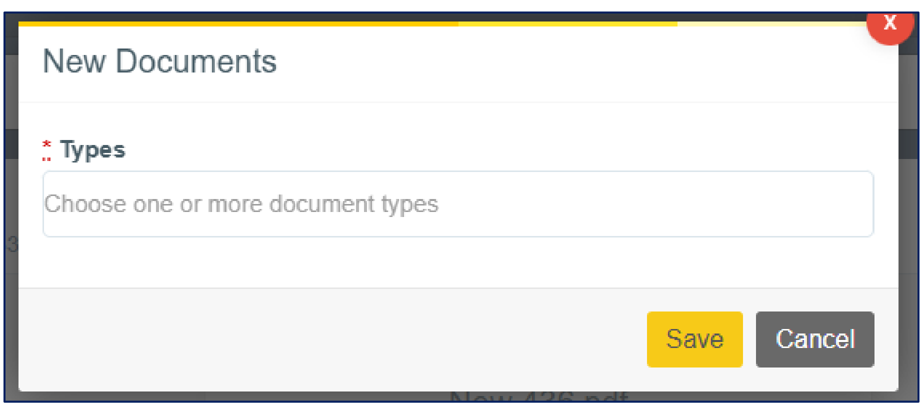
When doing this, the file name of each document becomes the title of that document in Doc Express. To submit multiple documents at once, click on the Submit Document button and then click on the "Want to Upload Multiple Documents?"



The following graphic will be displayed. Click on the arrow to choose to submit multiple documents at once.



You can then highlight the documents you would like to submit, then click Open. The file name of the document will become the title of each document in Doc Express. Select the Type(s) in the next window that appears. Some drawers will require you to "sign" by checking the box and then clicking Save, but not all.

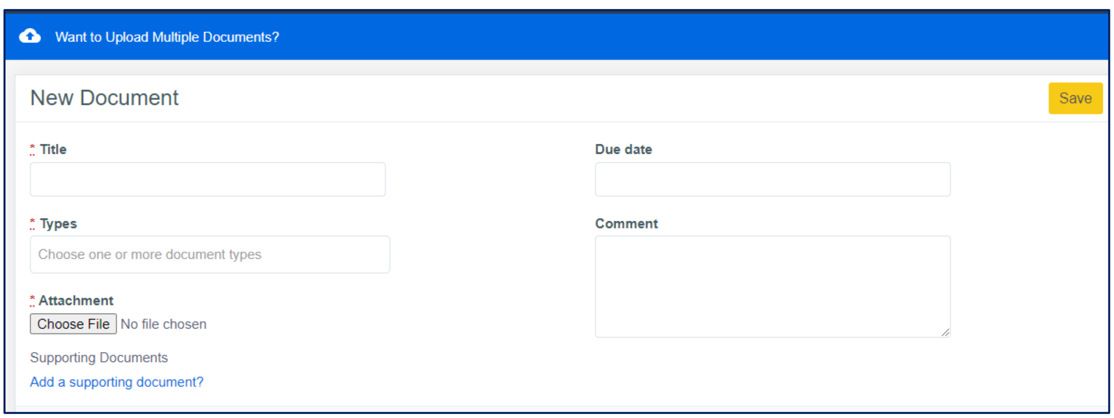


While they are being submitted, each of the multiple documents will be shown and will disappear as they are submitted as individual documents in the drawer. Each document will have a status of Submitted.

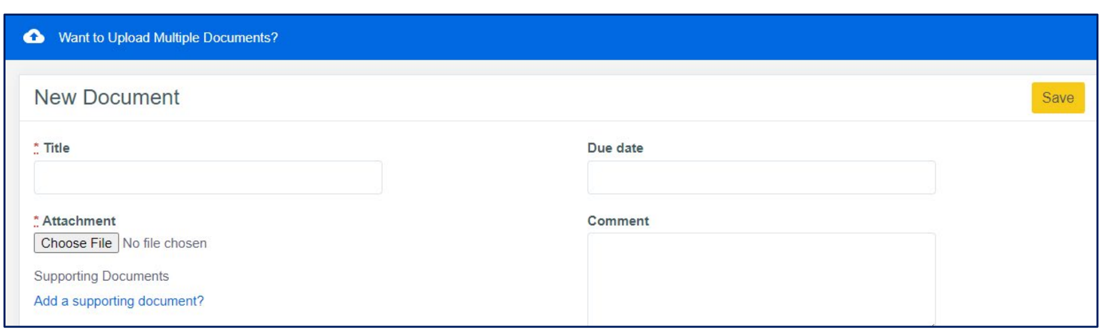
Submittals by Drawer

Traffic Control & Weekly Reports drawer submittal screen:

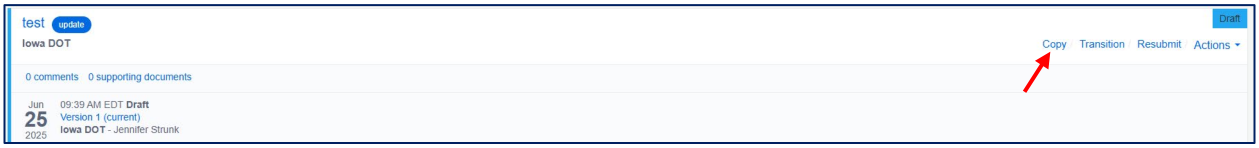
Contract Documentation, Items & Materials Documentation, Environmental, Payrolls & Shop & Working Drawings drawer submittal screen:



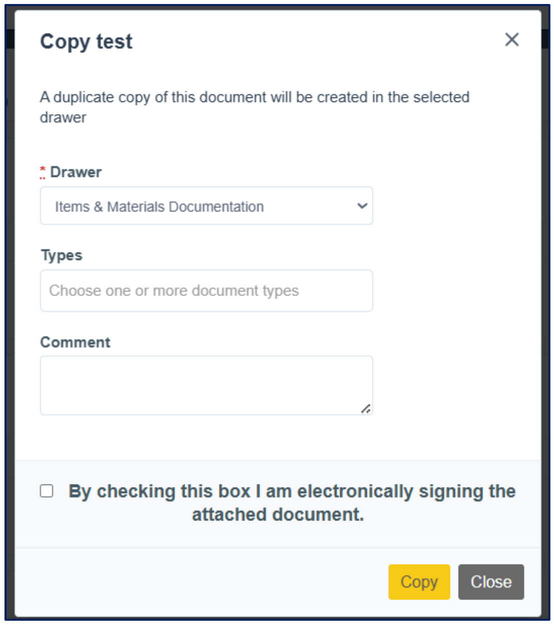
Working Drawer submittal screen:



As seen above, this drawer has no type, and no signature is required when submitting a new document. To move a document from the Working drawer to another drawer you will go to the document in the Working drawer and click on Copy.



Once you click on Copy it will bring up the option to select the drawer you would like to put the document in, once you select the drawer it will then give you the option to attach it to Types and make a comment. You will then click the check box at the bottom to sign the document.

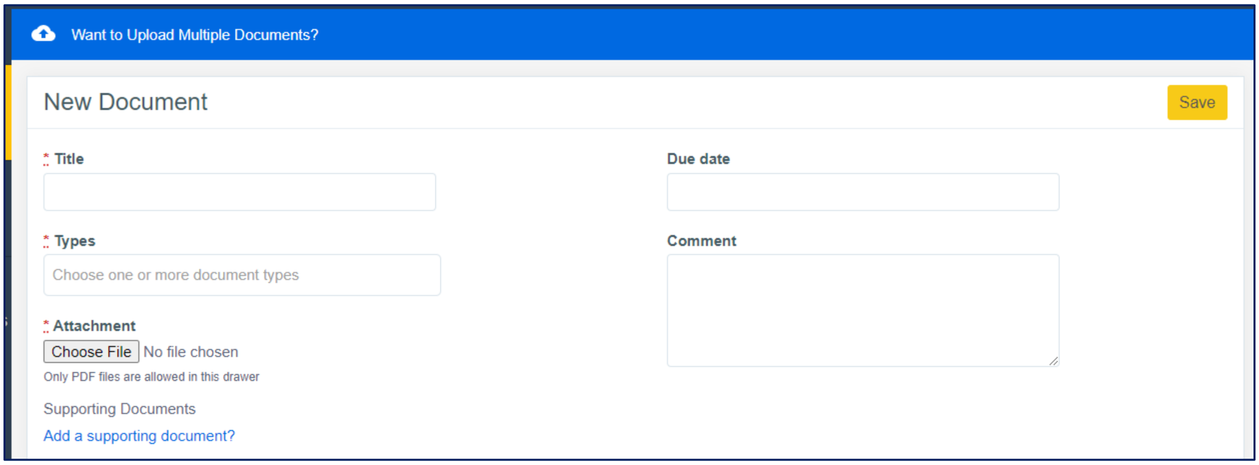


Change Order and Plans drawer submittal screen:

For Primary contracts, the Iowa DOT will always be the original submitter of documents into these drawers, contractors and suppliers will never see the submittal screens.

For Local Systems, The DOT does submit the as-advertised plans, but the as-let plans and as-built plans are submitted by the project engineer. For change orders, they are submitted by the project engineer, which will be a city, county, or consultant.

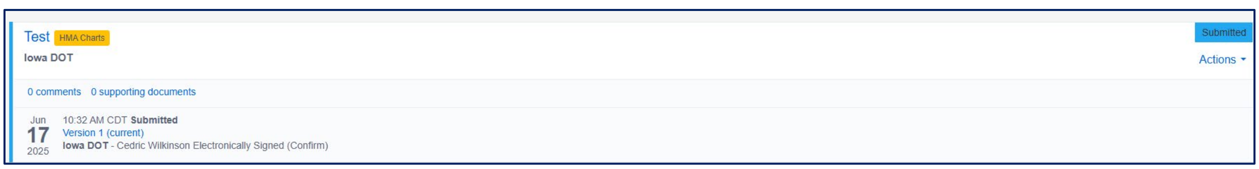
Contract Signing and Project Closeout drawer submittal screen:



This submittal screen is very similar to the Contract Documentation, Payrolls, and Shop Drawing drawers EXCEPT only PDF files are allowed in the drawer.

Viewing Submitted Documents

When viewing the list of submittals, the top line of each submittal displays the title, in blue, given to the document by the submitter and just to the right, in a yellow banner, is the type in which the submittal has been placed.



If the original submittal has been changed then re-submitted, the title will remain the same but it will display the most current submittal. The original submittal will be in the log. Just below the title is the company responsible for the submittal.

No one, including the submitter, can change the contents of the document in most drawers while it is in Doc Express. However, certain drawers have been given a markup and/or replacement option. In those cases, the original document can be marked up within the Doc Express program and replace the original. If that is done, the document is marked up and it overwrites the original document. There is no log of the changes. To markup a document you start by opening the document then clicking Edit. Select the markup tool from the markup toolbar on the left. When finished, click Save.

NOTE: once you markup the document in Doc Express, that overwrites the original iteration, it does not save as a new version of that document. This does not keep a history of any and/or all changes made to the document.

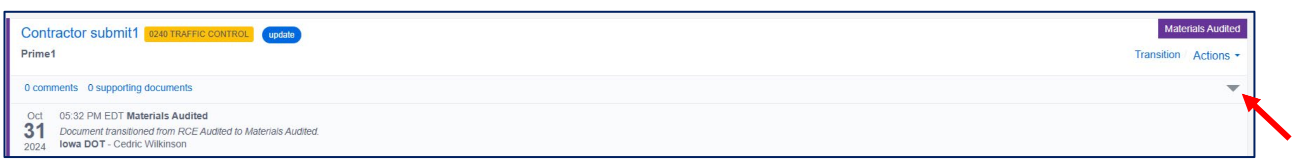
In the far left column is the date the submittal or the transition took place. Just to the right of that date is the time and the status of the submittal. Just under that are the comments, if any, that were made during that particular transition of the document. And, finally, on the bottom line is the company name followed by the user name of the person responsible for that submittal or transition.

To the far right, in color, is the status of the submittal – the status options vary depending on the drawer and the access of the user. Below the status is a possible transition which is dependent on the current status of the submittal as well as the access of the user who is logged in to the program. If you see the word "Transition", then you potentially have another action available to you. If no "Transition", there is nothing more for you to do for that particular submittal.

If the status is Received, that is the "end of the road" in most drawers. The Items & Materials Documentation drawer for primary contracts also has a Materials Reviewed step and three Audited statuses – RCE, District, and Materials - following the Received status. If the status is Rejected there is a transition option to Resubmit Document.

If the status is anything other than Submitted or if there has been any activity that has taken place, there will be an arrow below the status. By clicking on that arrow, the log of all activity on the left side of the screen will be expanded. If the status is Submitted, the submittal shown on the left side of the screen is the only activity so there is no arrow (no log) displayed.

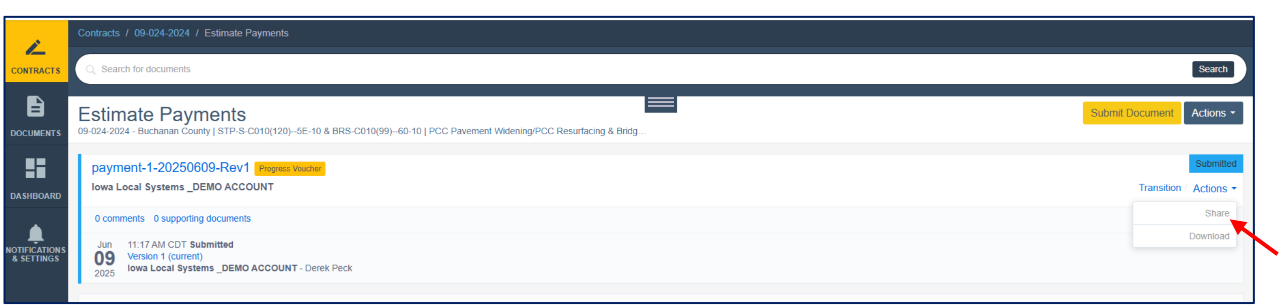
By default, the most current transaction is always displayed with the rest "hidden" until the arrow expands the list to display the entire log. If the list is expanded, you can hide the log by simply clicking on the arrow once again.



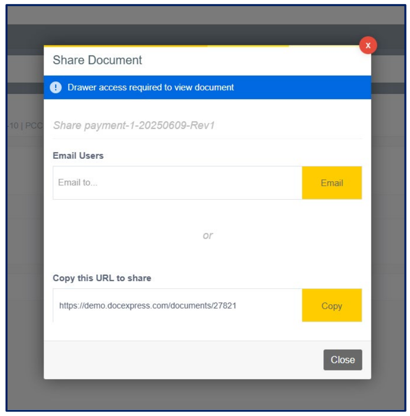
Sharing Uploaded Documents

Doc Express® allows the user to easily share documents with others. There are two options in which to share files. The first option will generate an email that provides a direct link within the email that will take you to the file in Doc Express®. The second option is to copy the URL address of the file that can be added to an email, etc. that can be clicked on to take a user directly to the file.

To share files, open a drawer in Doc Express®. To the far right of the file name, click on the blue Actions dropdown, then select Share.



A box will open that allows you to choose the preferred way to share the file.



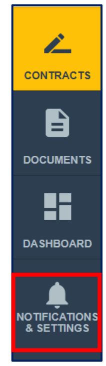
Revert Transition

If the status is Submitted, the submitter (& only the submitter) can remove the document as long as no transitions have taken place by anyone (including the submitter) and there are no comments and no supporting documents. To remove the document, click on Actions > Remove. If the status is anything other than Submitted, the person who last transitioned the document can revert the transition – similar to an un-do. This will revert the document back to the previous status.   The Revert Transition option can be done multiple times if necessary to get it back to a Submitted status so it can be removed. Even if reverted back to Submitted status, if there is a comment or supporting documents it cannot be removed by the user. If the document needs to be removed and the user cannot do it, for Primary contracts contact either Jen Strunk – Jennifer.Strunk@iowadot.us (Cell – 641-344-0044) or Tyson Sickles – Tyson.Sickles@iowadot.us (Cell 641-290-1046). For Local Agency Contracts, contact Derek Peck – Derek.Peck@iowadot.us (Phone 515-239-1391).

Notification & Settings

Doc Express® allows users to configure notifications to stay informed about activity across all assigned contracts. Notifications help track document progress and deadlines without the need to manually monitor every change. The notification will come in the form of an email to the user's email address that was used when logging into Doc Express®.

Accessing Notifications & Settings

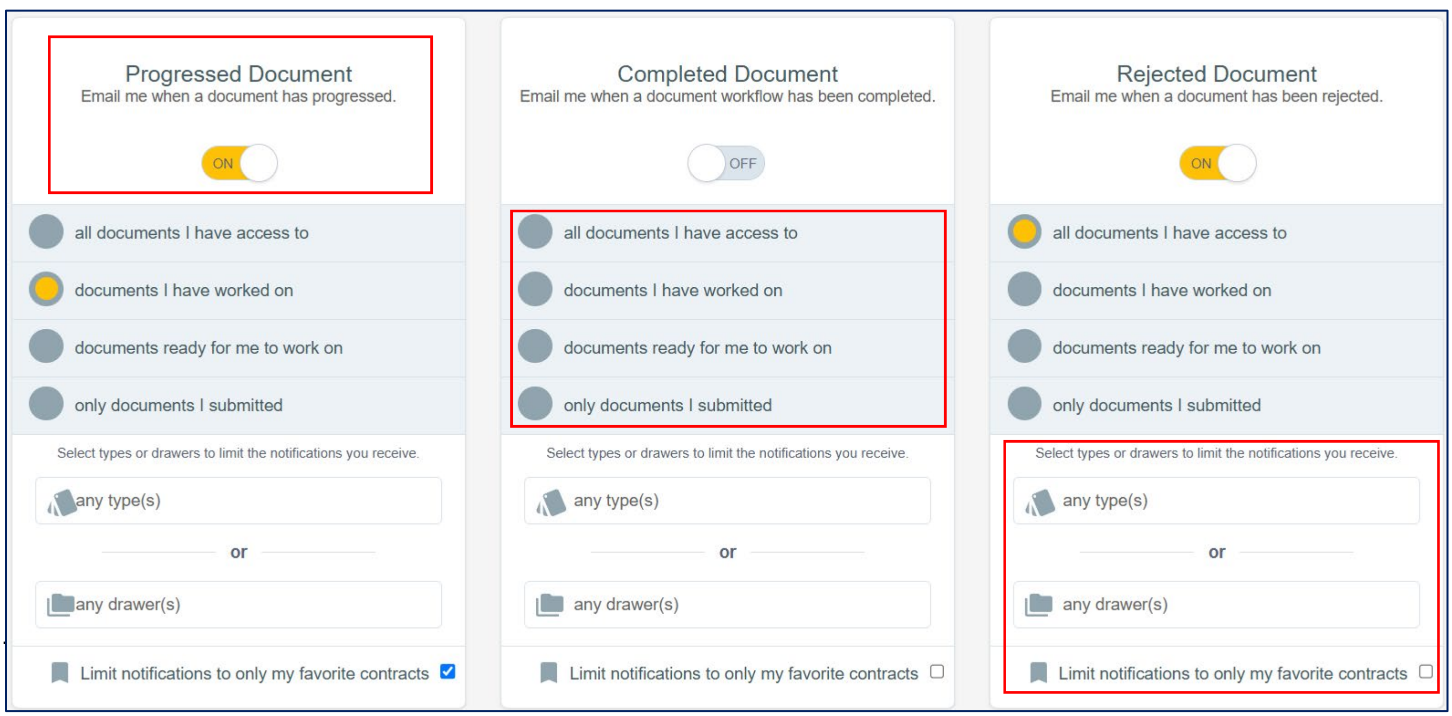


To manage your notification preferences:

1. Click on the **Notifications & Settings** option in the left sidebar.
2. This page allows the user to review and select preferences for:
    - Workflow events (e.g., document progression, completion, rejection)
    - Specific document types and/or drawers
    - Frequency and scope of summary reports

Note: You do not have to submit a document to receive notifications. These settings apply globally across all contracts you are assigned to.

Document Notifications



Three notification categories are available:

- **Progressed Document**
  Receive an email when a document moves to the next step in its workflow.

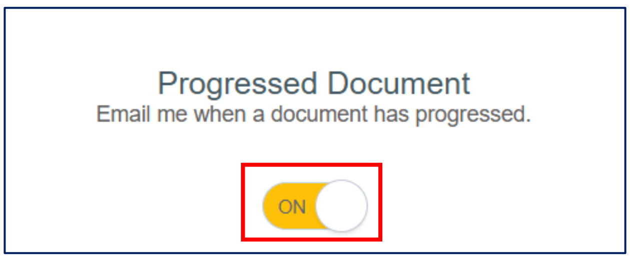
- **Completed Document**
  Receive an email when a document's workflow is fully completed.

- **Rejected Document**
  Receive an email when a document is rejected and may require revision or resubmission.

Tip: For contracts with signature requirements (e.g., Contract Signing), enabling both "Completed" and "Progressed" notifications ensures you are aware of when documents are ready to sign and when the contract is marked complete.

Turning Notifications On or Off

Accounts created before August 25, 2021, have all notification toggles set to **On** by default.
To modify, click the **toggle switch** below each option to turn it **On** or **Off** as needed.



Your changes will take effect immediately and can be updated anytime.

Notification Scope

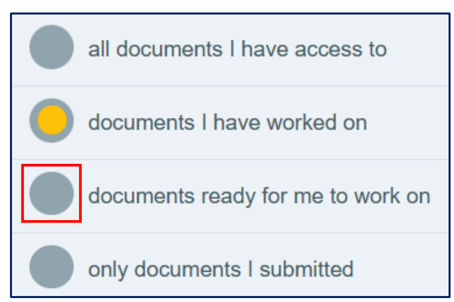
For each category, users can customize their alerts by choosing from the following options:

- *All documents I have access to*:
  Alerts for any document you can view within your assigned contracts.

- *Documents I have worked on:*
  Alerts only for documents you have interacted with (e.g., submitted, commented on).

- *Documents ready for me to work on:*
  Alerts when you are the next user in the document's workflow.

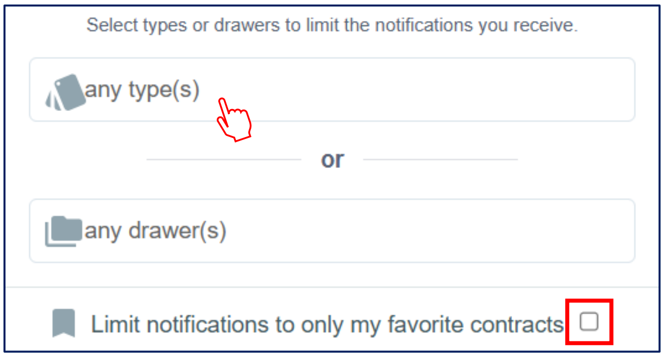
- *Only documents I submitted*:
  Alerts for progression or status updates on documents you submitted.

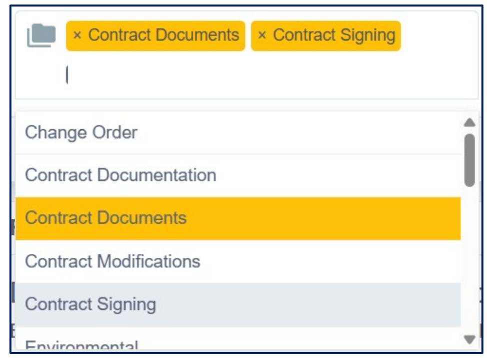


⚠ **Caution**: If you select "All documents I have access to" without narrowing drawers or types, you may receive high volumes of emails.

Filters

- **Type Filter**: Limit notifications to specific document types.
- **Drawer Filter**: Limit notifications to specific drawers.
- **Limit notifications to only my favorite contracts**: Check this option to receive alerts only for contracts marked as favorites.





To apply these filters, click on the “any type(s)” or “any drawer(s)” button to reveal a list of available type or drawers associated with your contracts. Scroll through the list and click to select the desired ones.

Tip: Be aware that if the name of a drawer or type has been modified, you will need to have **both** the old and new name selected if you have active contracts let before and after the name of the drawer or type was modified. To verify the most current drawer and type names, refer to the Naming Convention (see Appendix).

Document Submission Reports

You may opt-in to receive **daily summary emails** with submission activity from the previous day. These do **not** include transitions but only initial submittals.

Available report types:

- **All Contracts** – Submittals from all contracts you have access to.
- **Favorite Contracts** – Only includes submittals from contracts marked as favorites.

- **Due Dates Report** – Documents that are past due or upcoming within a defined window (default is seven days, click on the dropdown to modify.)

To enable a report, toggle the switch to the “On” position. These reports are delivered once daily, typically early in the morning.

Export Settings

At the bottom of the settings panel, there is an option to control how filenames are generated when exporting documents:

Use Short File Names: When enabled, exported filenames will contain only the document title and version number, omitting the original filename.

A preview of the file name format is shown beneath the setting, comparing both “On” and “Off” modes.