

Appia

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

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1 - Basic Navigation

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

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

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

The screenshot shows the Appia software interface. On the left is a dark navigation menu with icons for 'MY PROJECTS', 'REFERENCE DATA', 'SYSTEM MGT', and 'EXPORT DATA'. The top navigation bar includes the Appia logo, a notification bell, a help icon, and a user profile icon with initials 'NS'. Below the navigation bar is a blue banner with the text 'Working business as Iowa Local Systems _DEMO ACCOUNT. Switch to another business?'. The main content area is titled 'My Projects' and features a 'Find Project' search bar, 'Create Project' and 'Import Project' buttons, and a 'Status' dropdown menu. Below this is a table of 'Favorites' projects.

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

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

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

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

2 - Setting up Appia & “My Account” Screen

Activating & Setting up Appia

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

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

My Account

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

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

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

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

To the right of the contact info is a card for 'Iowa Local Systems' with address and phone number. Below that is a 'Search for Employees' bar. In the top right corner, a circular profile icon with 'NS' is circled in green. A dropdown menu is open from this icon, showing 'Nicole Stinn', her email, and the agency name. The 'Account settings' option in this menu is highlighted with a green oval. Other options in the menu are 'Sign out' and 'Legal Notices'.

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

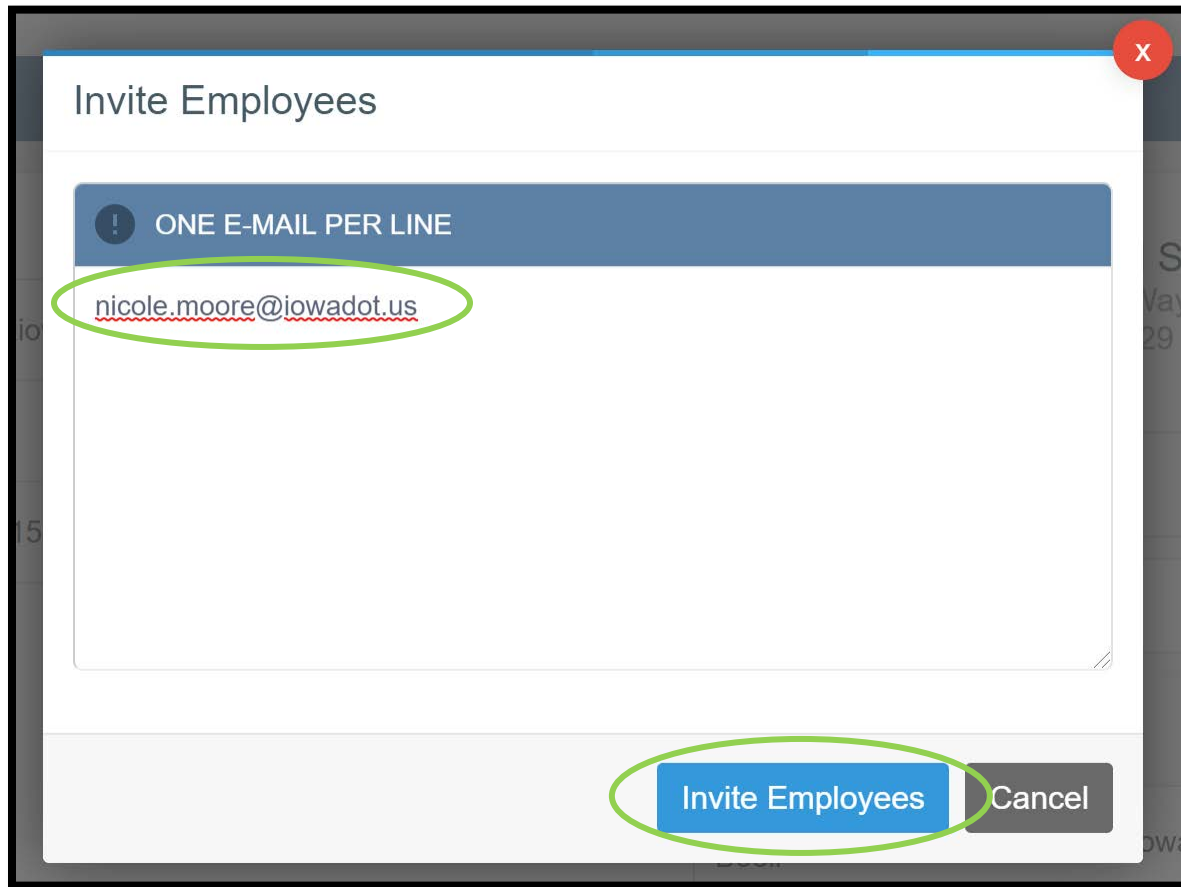
The screenshot displays the Infotech account settings interface. On the left sidebar, the 'MY ACCOUNT' section is active, and the 'DIGITAL ID' button is circled in red with a diagonal line through it. The main content area shows the user profile for Nicole Stinn with fields for Email, Mobile, Phone,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

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

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

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

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



Invite Employees

! ONE E-MAIL PER LINE

nicole.moore@iowadot.us

Invite Employees Cancel

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

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

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

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

The screenshot displays the IOWADOT user management interface. At the top left is the IOWADOT logo with the tagline "GETTING YOU THERE". To its right is the address "600 Lincoln Way, Ames, IA 50010" and the phone number "(515) 509-9398". A blue "Invite Employees" button is located in the top right. Below this is a search bar with the placeholder text "Search for Employees" and a "Search" button. The main content area features a table with the following columns: "Name", "Email", "Role", "Legacy Digital ID", and "Multi-Browser ID". The table lists three employees: Noah Thomas, Ross Wood, and Sophy Yang. The first row, for Noah Thomas, is highlighted in yellow. To the right of the "Role" column for Noah Thomas is a gray "Actions" dropdown menu, which is circled in green. The dropdown menu is open, showing two options: "Change role" (a blue link) and "Remove" (a red link). The "Actions" dropdown for the third employee, Sophy Yang, is also visible.

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

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

The screenshot shows the infotech user interface. On the left is a sidebar with navigation links: MY ACCOUNT, DIGITAL ID, PAYMENTS, and NOTICES. The main content area is divided into two sections. The left section displays the profile for Nicole Stinn, including her email (niki.stinn@iowadot.us), mobile number, phone number ((515) 239-1529), fax number, and time zone (Eastern Time (US & Canada)). The right section displays the company profile for Iowa Local Systems, including their address (800 Lincoln Way, Ames, IA 50010) and phone number ((515) 509-9398). Below the company profile is a search bar for employees and a table listing employees. The table has columns for Name, Email, Role, Legacy Digital ID, and Multi-Browser ID. The first employee listed is Andrew Cox, with email andrew.cox@iowadot.us and role User. A pop-up menu is open in the top right corner, showing options: Appia, Bld Express, Doc Express, Signet, and Release notes. The 'Appia' and 'Bld Express' options are circled in green.

infotech

Logged in!

Nicole Stinn Edit Actions

Email niki.stinn@iowadot.us

Mobile

Phone (515) 239-1529

Fax

Time Zone Eastern Time (US & Canada)

Iowa Local Systems DEMO ACCOUNT

800 Lincoln Way, Ames, IA 50010
(515) 509-9398

Invite Employees

Search for Employees Search

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

Appia
Bld Express
Doc Express
Signet
Release notes

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

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

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

The screenshot displays the 'My Projects' section of the Appia application. The interface includes a sidebar with navigation options: MY PROJECTS (highlighted), REFERENCE DATA, SYSTEM MGT, EXPORT DATA, and HELP. The main content area shows a list of projects under the 'Under Construction' status. Two buttons, 'Create Project' and 'Import Project', are visible in the top right corner, with green callout boxes labeled '1' and '2' respectively. The 'Create Project' button is highlighted with a green box labeled '1', and the 'Import Project' button is highlighted with a green box labeled '2'.

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

Method #1 – Creating a project

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

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

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

The screenshot displays the 'Local Lettings' software interface. At the top, there's a navigation bar with 'Projects', 'Contractors', 'Bid Items', and 'Officials'. Below this is a search bar and buttons for 'Add Project' and 'Import From TPMS'. A message banner states: 'This project has been Closed. Changes are no longer allowed.' The main area is divided into a left sidebar and a right pane. The sidebar contains a list of project items with columns for 'Letting Date', 'Project Number', 'Name', 'Bid Type', and 'Status'. The right pane shows the 'Bids' section, which includes a 'Setup' tab, a 'Bid Tab' tab, and a 'Send Bid Tab' button. Below these are buttons for 'PDF', 'Excel', and 'Show Engineer's Estimate'. The 'Excel' button is highlighted with a green circle. The 'Bids' section also includes a table with columns for 'Item Number/Description', 'Quantity', 'Units', and 'Unit Price'. The table lists several items, including 'SPECIAL BACKFILL', 'EXCAVATION, CLASS 13, WASTE', 'GRANULAR SHOULDERS, TYPE B', 'RELOCATION OF MAIL BOXES', 'PAVEMENT SCARIFICATION', 'RUMBLE STRIP PANEL (PCC SURFACE)', and 'PORTLAND CEMENT CONCRETE OVERLAY, FURNIS...'. The 'Appia Export' button is circled in yellow and crossed out with a red 'X'.

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

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

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

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

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

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

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

Click "Save" when finished entering information.

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

Projects / New

New

* Project ID
86-C086-060 - 31961

Work Type
BRIDGE REPLACEMENT - PPCB

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

DBE % Goal
0.000%

MBE % Goal
0.000%

WBE % Goal
0.000%

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

Project Location

Location
C A

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

Save Cancel

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

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

Projects / 86-C086-060 - 31961

86-C086-060 - 31961 New

Gladbrook Bridge Replacement Letting Date: October 21, 2014

Import Items

Overview Edit

General Info

Created By
Nicole Stinn

Work Type
BRIDGE REPLACEMENT - PPCB

Location
C A

Description
Gladbrook Bridge Replacement
Letting Date: October 21, 2014

Important Dates

09/01/2020
Date Created

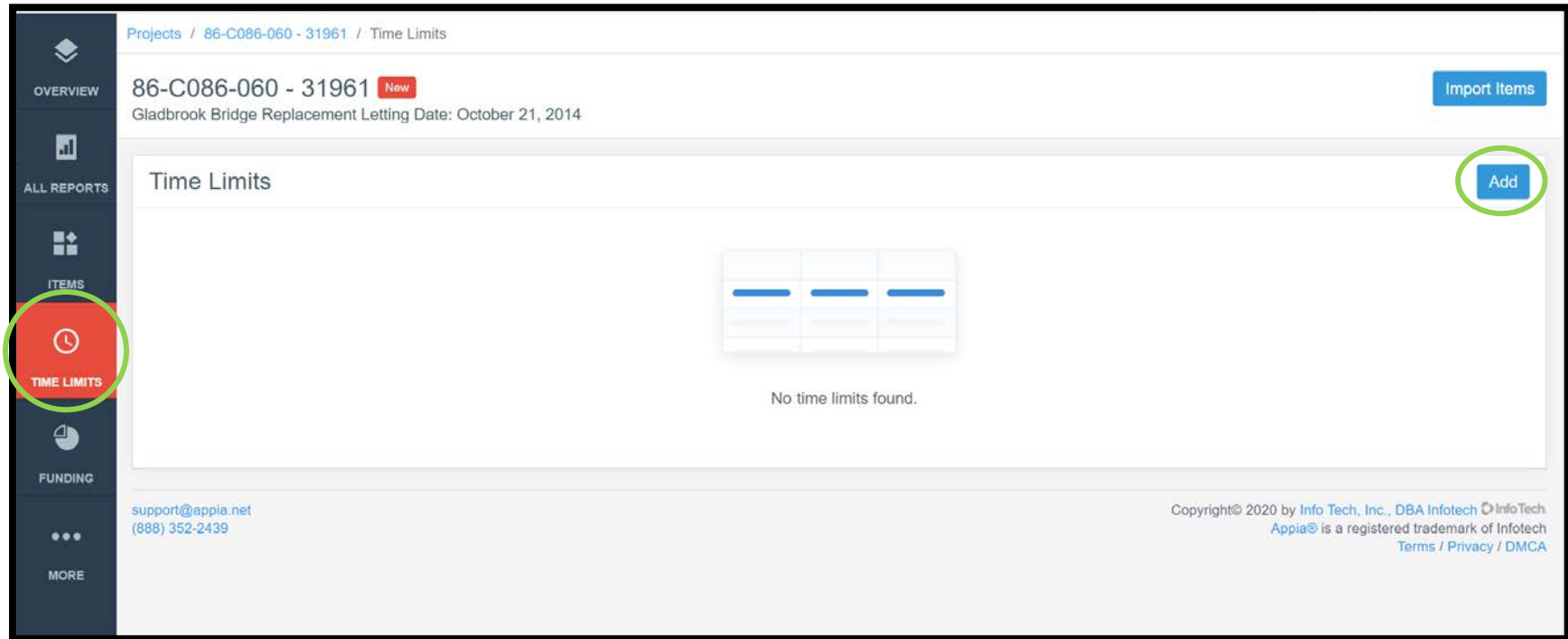
Project Amounts

\$0.00
Total

Goals

3.087%

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



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

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

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

Working Days option picked

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

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

Import Items

New Time Limit

*** Type**
Working Days

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

Primary Deadline?
☐ NO

*** Deadline Days**
0.0

Liquidated Damages
\$0.00

Save Cancel

Completion Date option picked

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

86-C086-060 - 31961 New Import Items

Gladbrook Bridge Replacement Letting Date: October 21, 2014

New Time Limit

Save Cancel

* Type
Completion Date

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

Primary Deadline?
☐ NO

* Deadline Date
04/06/17

Liquidated Damages
\$0.00

support@appia.net
(888) 352-2439

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

The time limit has been saved successfully.

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

86-C086-060 - 31961 New Import Items

Gladbrook Bridge Replacement Letting Date: October 21, 2014

Time Limits

Add

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

Displaying 1 time limit

4 - Creating Funding Packages and Sources

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

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

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

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

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

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

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

86-C086-060 - 31961 New Import Items

Gladbrook Bridge Replacement Letting Date: October 21, 2014

Funding Save Add Package Add Source Cancel

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

support@appia.net
(888) 352-2439

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

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

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

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

Counties

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

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

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

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

Cities

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

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

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

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

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

Import Items

Save Add Package Add Source Cancel

Fund Source	Fund Package
Show funding in dollars? <input type="radio"/> NO	Default Fund Package
Default Fund Source	100.000%
New Fund Source x	100.000%
	0.000%
	0.000%

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

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

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

Import Items

Save Add Package Add Source Cancel

Fund Source	Fund Package
Show funding in dollars? <input type="radio"/> NO	Farm-to-Market
Farm-to-Market	90.000%
TSIP x	100.000%
	10.000%
	0.000%

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

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

The screenshot shows the 'Funding' form for project 86-C086-060 - 31961. The 'Fund Source' column lists 'HBP' and 'Local'. The 'Fund Package' column shows 'HBP Federal Aid (Non-FM)' for HBP and '20.000%' for Local. The 'Local' source has a red 'x' icon next to it. The '20.000%' value is circled in green.

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

Click “Save” when finished entering funding information.

The screenshot shows the same 'Funding' form, but the 'Save' button is now circled in green, indicating it should be clicked to save the changes.

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

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

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

OVERVIEW

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Project funding has been updated successfully.

Projects / 86-C086-060 - 31961 / Funding

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

Import Items

Funding

Edit

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

Items

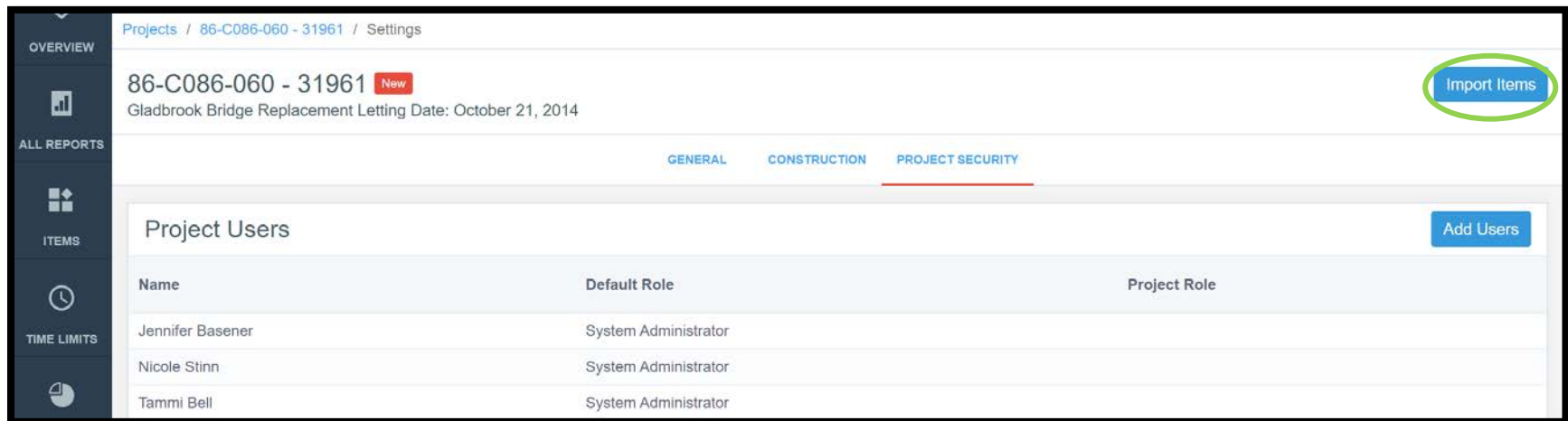
No items found.

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

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

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

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

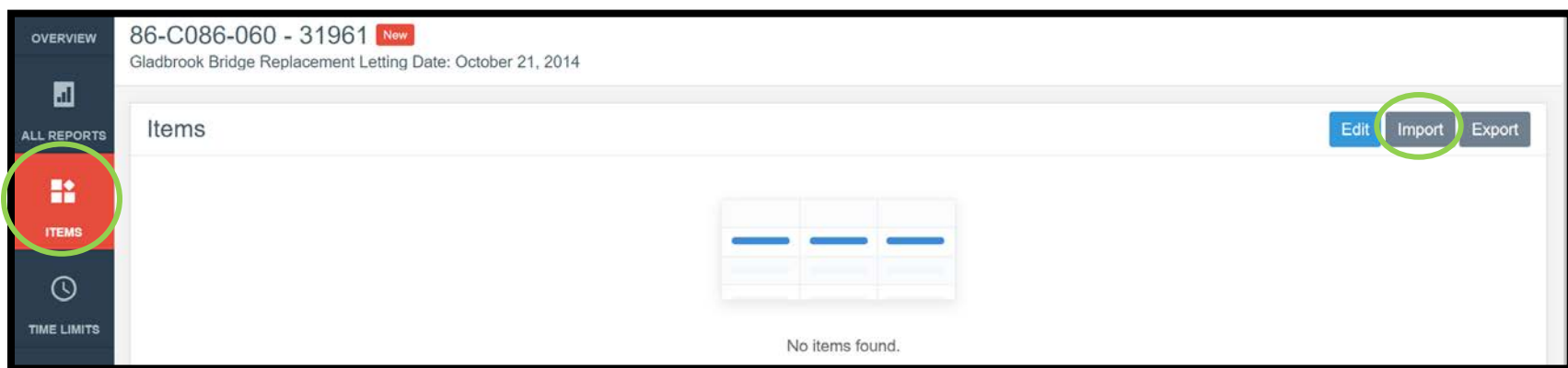


The screenshot shows the 'Project Users' screen for project 86-C086-060 - 31961. The left sidebar contains navigation options: OVERVIEW, ALL REPORTS, ITEMS, and TIME LIMITS. The main content area has tabs for GENERAL, CONSTRUCTION, and PROJECT SECURITY. The 'PROJECT SECURITY' tab is active, showing a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

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

OR

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



The screenshot shows the 'Items' screen for project 86-C086-060 - 31961. The left sidebar contains navigation options: OVERVIEW, ALL REPORTS, ITEMS, and TIME LIMITS. The 'ITEMS' button in the sidebar is circled in green. The main content area shows a table with no items found. In the top right corner, the 'Import' button is circled in green.

Item	Quantity	Unit Price
------	----------	------------

No items found.

Either path will bring you to this screen.

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

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

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

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

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

Import Items Cancel

Choose a CSV or Excel file to import.

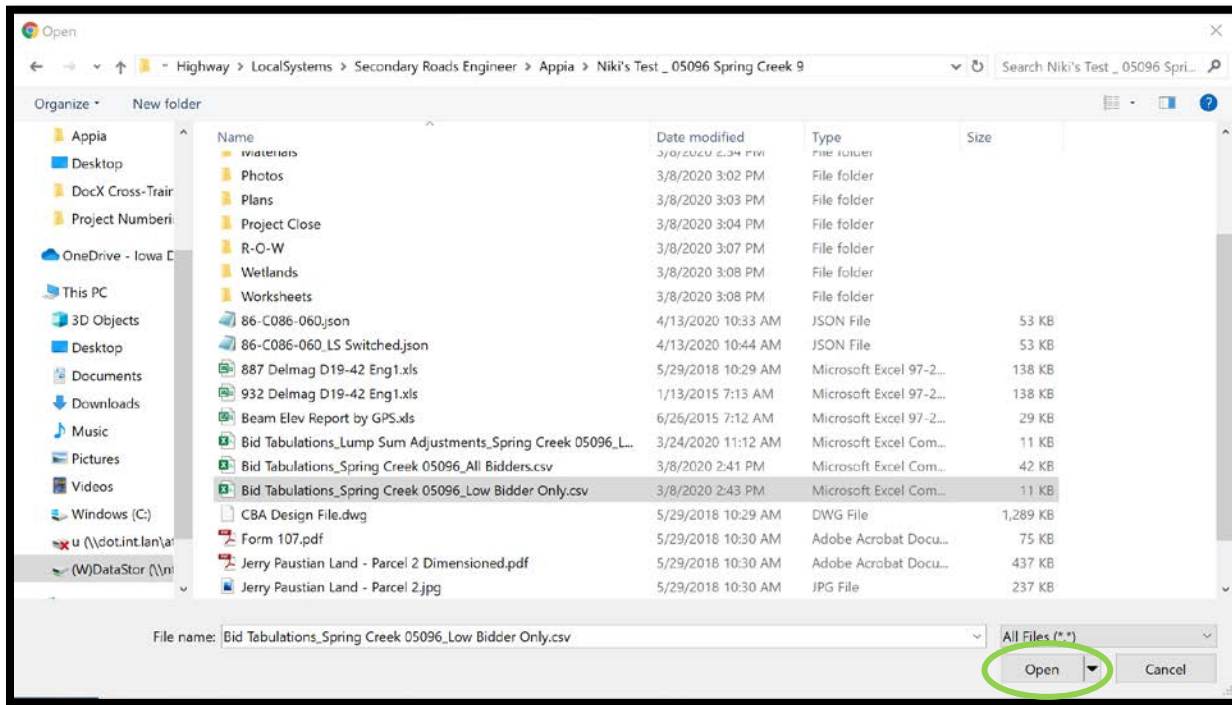
Choose File No file chosen

Upload File

Options

☒ Restrict import to reference items?

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



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

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

Click on “Upload File”.

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

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

DOT File – No longer applicable

ICEA Service Bureau File

OVERVIEW

ALL REPORTS

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

LFM-2015-01--7X-86 - CSV New
Columbia Stub Resurfacing Letting Date: 10/27/14

Import Items Import Cancel

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

Default Section

** None Selected **

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

Select number of rows to skip

** None Selected **

Preview (first 10 out of 24 rows)

Options

☒ Clear project items before import?

Unassigned Column

Unassigned Column

Unassigned Column

Unassigned Column

Unassigned Column

Unassigned Column

Unassigned Column

Unassigned Column

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

Tama County

Apparent Low Bid

Engineer's Estimate

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

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

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

Columns that must have names assigned:

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

DOT File

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

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

Import Items Import Cancel

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

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

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

Options: ☒ Clear project items before import?

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

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

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

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OVERVIEW

ALL REPORTS
ITEMS
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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 **

Select number of rows to skip

** None Selected **

Options

☒ Clear project items before import?

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

Preview (first 10 out of 61 rows)

Assigned Column
Quantity
Unit
Unassigned Column
Unassigned Column
Unit Price
Unassigned Column
Unassigned Column

Description
Quantity
Unit
Vendor Name
Bidder ID
Unit Price
Extension
Deviation

ATION, CLASS ANNEL	5,700.00	CY	PETERSON CONTRACTORS INC.	PE320	\$4.50	\$25,650.00	\$0.00
/AL OF EXISTING E	1	LS	PETERSON CONTRACTORS INC.	PE320	\$10,700.00	\$10,700.00	\$0.00
/AL OF EXISTING TURES	1	LS	PETERSON CONTRACTORS INC.	PE320	\$5,000.00	\$5,000.00	\$0.00
ATION, CLASS 20	602	CY	PETERSON CONTRACTORS INC.	PE320	\$12.15	\$7,314.30	\$0.00

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

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

Columbia Stub Resurfacing Letting Date: 10/27/14

Import Items

Import Cancel

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

Select number of rows to skip
** None Selected **
Preview (first 10 out of 24 rows)

Options
☒ Clear project items before import?

Line Number **Item ID** **Unassigned Colum** **Unit** **Quantity** **Unit Price** **Unassigned Colum** **Unassigned Colum**

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

Tama County

Apparent Low Bid

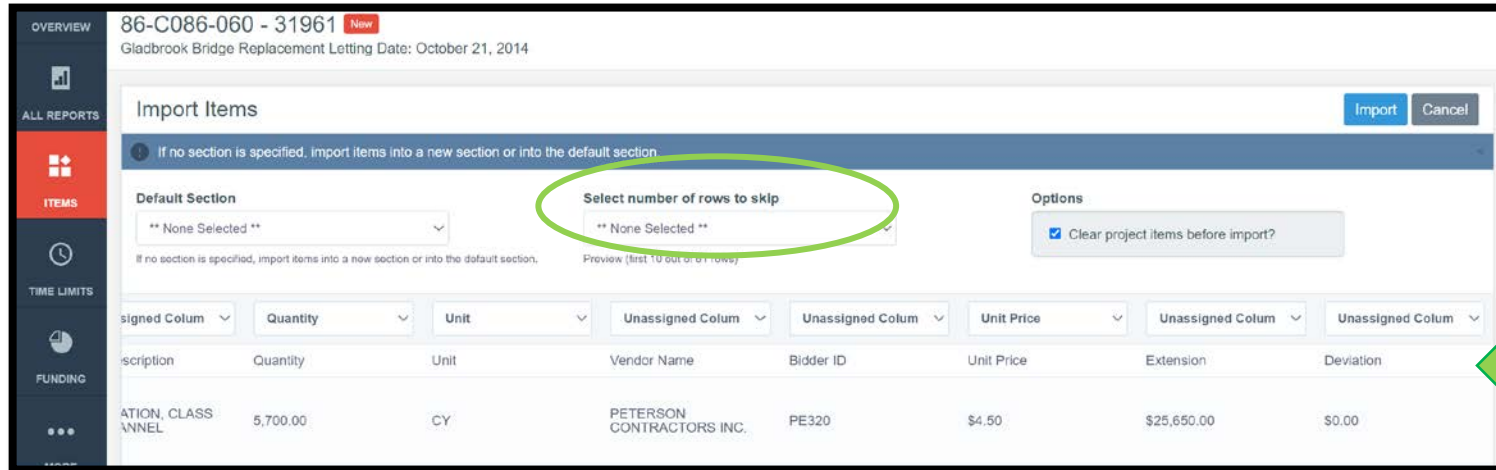
Engineer's Estimate

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

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

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

DOT File



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

Import Items Import Cancel

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

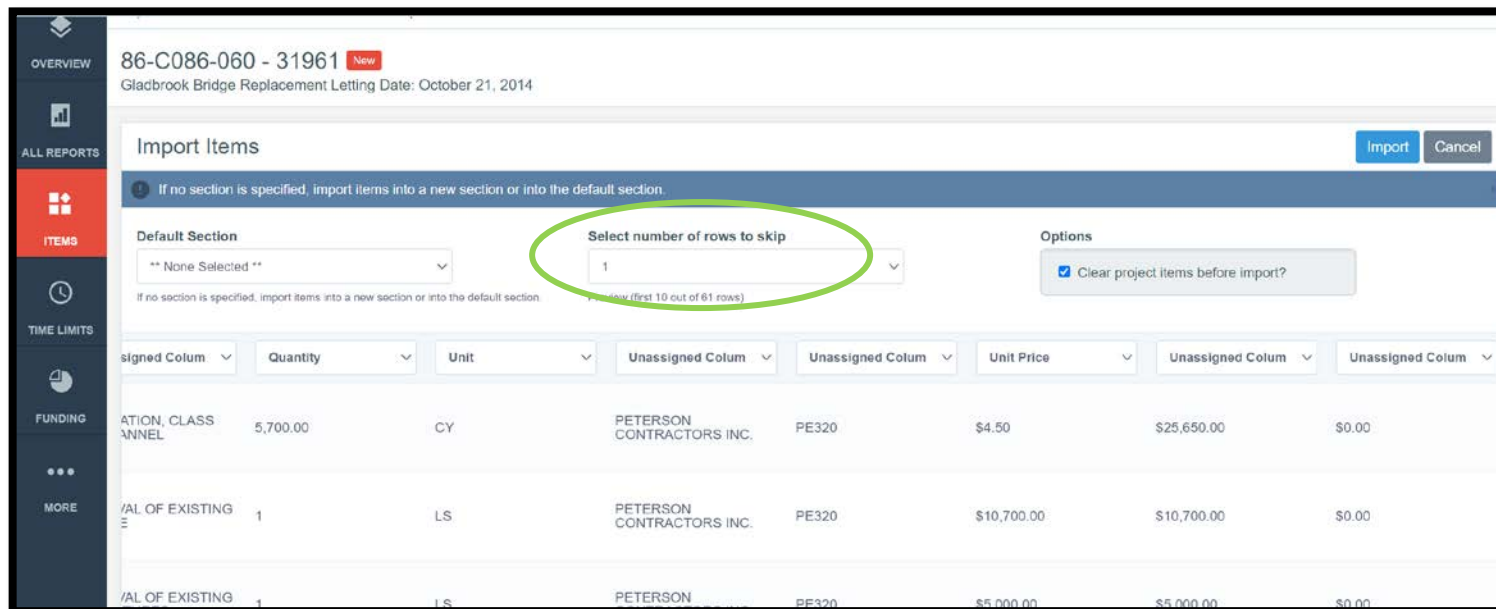
Default Section: ** None Selected **

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

Options: ☒ Clear project items before import?

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

Before



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

Import Items Import Cancel

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

Default Section: ** None Selected **

Select number of rows to skip: 1

Options: ☒ Clear project items before import?

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

After

ICEA Service Bureau File

Columbia Stub Resurfacing Letting Date: 10/27/14

Import Items

[Import](#) [Cancel](#)

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 22 rows)

Options
☒ Clear project items before import?

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

Before

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

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

[Advance to Construction](#) [Reports](#)

Columbia Stub Resurfacing Letting Date: 10/27/14

Import Items

[Import](#) [Cancel](#)

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
 5
Preview (first 10 out of 22 rows)

Options
☒ Clear project items before import?

Line Number	Item ID	Unassigned Column	Unit	Quantity	Unit Price	Unassigned Column
1	2102-0425070	SPECIAL BACKFILL	TON	861.2	21.0	18085.2
2	2102-2713090	EXCAVATION, CLASS 13, WASTE	CY	607.8	12.0	7293.6
3	2121-7425020	GRANULAR SHOULDERS, TYPE B	TON	3641.6	18.5	67369.6

After

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

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

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

Import Items

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

Default Section
** None Selected **

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

Select number of rows to skip
1

Preview (first 10 out of 61 rows)

Options
☒ Clear project items before import?

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

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

Projects / 86-C086-060 - 31961 / Items

86-C086-060 - 31961 New

Gladbrook Bridge Replacement Letting Date: October 21, 2014

Advance to Construction Reports

Items Edit Import Export

60 rows successfully imported.

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

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

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

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

6 - Creating Bid Items Manually

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

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

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

Projects / Manual Item Entry

Manual Item Entry New

Letting Date: 06/08/20

[Import Items](#)

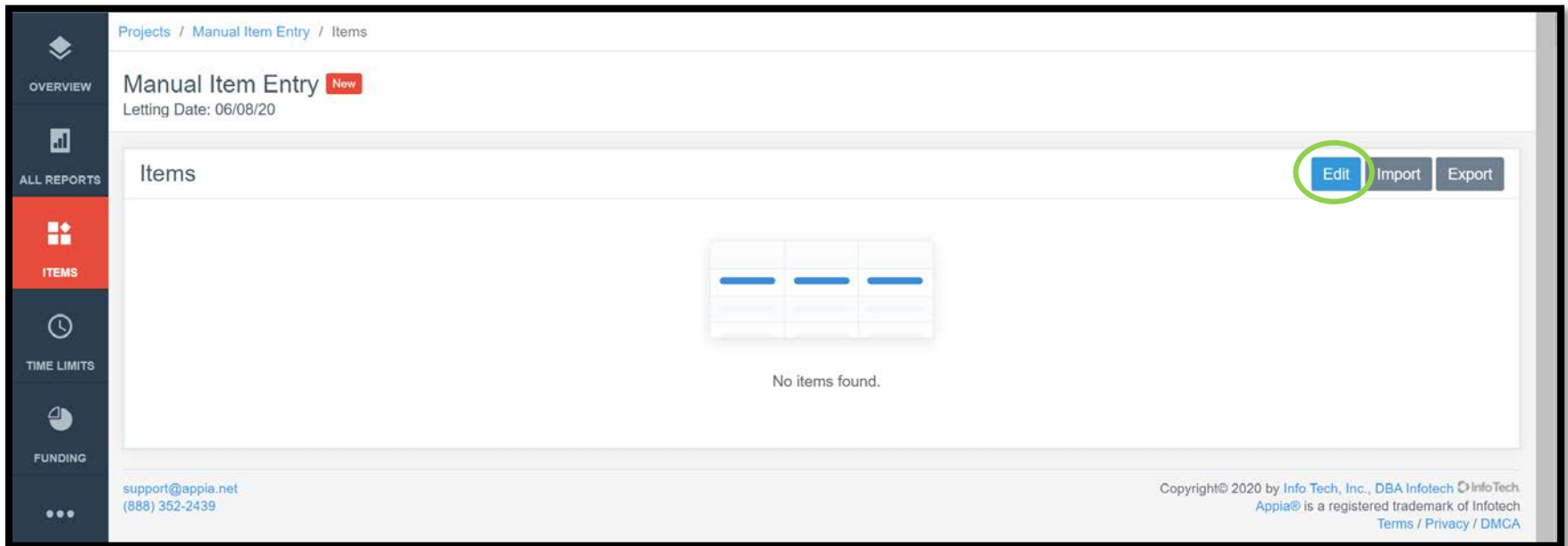
Overview [Edit](#)

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

Important Dates
06/08/2020 Date Created

Project Amounts
\$0.00 Total

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.

Projects / Manual Item Entry / Items / Edit Items

Manual Item Entry New

Letting Date: 06/08/20

[Import Items](#)

Items

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

Line Number	Item ID	Quantity	Unit	Unit Price	Extension
Section: 1 - Description					
Add Items Actions					
No items found					
					Total: \$0.00
Save Add Section					

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

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

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

Add Item(s) to Section

Search

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

« First ◀ Prev 1 2 3 4 5 6 ... Next ▶ Last »

Displaying items 31 - 60 of 4684 in total

1 Item(s)Add ItemsCancel

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

Add Item(s) to Section

reinforcing

Search

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

Displaying all 4 items

2 Item(s)

Add Items

Cancel

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

Projects / Manual Item Entry / Items / Edit Items

Manual Item Entry New Import Items

Letting Date: 06/08/20

Items Save Add Section Cancel

Line Number	Item ID	Quantity	Unit	Unit Price	Extension
Section: 1 - Description Add Items Actions					
0010	2101-0850001	2.340	ACRE	\$3,750.000	\$8,775.00
CLEAR+GRUBB					
0020	2404-7775000	40,000.000	LB	\$1.250	\$50,000.00
REINFORCING STEEL					
0030	2404-7775005		LB		\$0.00
REINFORCING STEEL, EPOXY COATED					
Displaying all 3 items					
					Total: \$58,775.00
Save Add Section					

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

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

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

The screenshot shows the 'Manual Item Entry' screen in the Appia software. A green notification banner at the top states 'The items have been updated successfully.' The left sidebar contains navigation options: OVERVIEW, ALL REPORTS, ITEMS (highlighted in red), TIME LIMITS, FUNDING, and MORE. The main content area is titled 'Manual Item Entry' with a 'New' tag and a 'Letting Date: 06/08/20'. It includes buttons for 'Advance to Construction' and 'Reports'. Below the title is a search bar and a table of items. The table has columns for Line Number, Item ID, Quantity, Unit, Unit Price, and Extension. It lists three items under 'Section: 1 - Description' and shows a 'Section Total' and 'Project Total' of \$81,775.00.

Projects / Manual Item Entry / Items

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

Advance to Construction Reports

Items

Edit Import Export

Search for Line Number, Item ID, Description and Unit

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

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7 - Contracts with Multiple Funding Packages

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

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

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

The screenshot displays the 'Funding' tab in a project management application. The sidebar on the left has the 'FUNDING' tab selected, indicated by a red circle. The main content area shows the 'Contract ID' section with a 'New' tag and a 'Letting Date: 02/18/20'. Below this is the 'Funding' section with an 'Edit' button. The 'Funding' section contains a table with columns 'Fund Source' and 'Fund Package'. The 'Fund Source' is 'Default Fund Source' and the 'Fund Package' is 'FM & STBG'. The 'Fund Source' table shows a value of '\$3,810,625.80' and '100.000%'. The 'Fund Package' table shows a value of '\$0.00' and '100.000%'. Below the 'Funding' section is the 'Items' section with an 'Edit' button circled in green. The 'Items' section contains a table with columns 'Line Number', 'Item ID', 'Quantity', 'Unit', 'Unit Price', and 'Extension'. The table lists two items: '0010' with 'Item ID' '2121-7425020', 'Quantity' '447.000', 'Unit' 'TON', 'Unit Price' '\$18.510', and 'Extension' '\$8,273.97'. The item description is 'GRANULAR SHOULDERS, TYPE B' and the funding package is 'FM & STBG: 447.000'. The second item is '0020' with 'Item ID' '2214-5145150', 'Quantity' '17,677.000', 'Unit' 'SY', 'Unit Price' '\$2.070', and 'Extension' '\$36,591.39'. The item description is 'PAV'T, SCARIFICATION' and the funding package is 'FM & STBG: 17,677.000'. There are also toggle switches for 'Show funding in dollars?' set to 'NO'.

Line Number	Item ID	Quantity	Unit	Unit Price	Extension
Section: 1 - LFM-(77)--7X-95 - 12345 (R27)					
0010	2121-7425020	447.000	TON	\$18.510	\$8,273.97
GRANULAR SHOULDERS, TYPE B FM & STBG: 447.000					
0020	2214-5145150	17,677.000	SY	\$2.070	\$36,591.39
PAV'T, SCARIFICATION FM & STBG: 17,677.000					

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

Projects / Contract ID / Funding / Edit Item Package Splits

Contract ID New Advance to Construction

Letting Date: 02/18/20

Item Package Splits In dollars? ☐ NO Save Cancel

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

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

OVERVIEW

ALL REPORTS

ITEMS

TIME LIMITS

FUNDING

MORE

Projects / Contract ID / Funding / Edit Item Package Splits

Contract ID New

Advance to Construction

Letting Date: 02/18/20

Item Package Splits

In dollars? ☐ NO Save Cancel

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

Assign Fund Package

Excludes split items

FM & STBG

Local

Split

Split

Split


8 - Contracts with Multiple Projects/Divisions

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

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

Method 1: Amending the .csv File


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



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	Proposal	Call Order	Section Num	Section Description	Line	Item	Alternate C	Item Descri	Quantity	Unit	Vendor Nar	Bidder ID	Unit Price	Extension	Deviation
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 C	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
23	95-C095-07	166	2	Roadway Items - STBG-SWAP-C095(71)--FG-95	220	2526-8285000		CONSTRUC	1 LS		MATHY CO MA810		\$2,000.00	\$2,000.00	\$0.00

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

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



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	Proposal	Call Order	Section Num	Section Description	Line	Item	Alternate C	Item Description	Quantity	Unit	Vendor Name	Bidder ID	Unit Price	Extension	Deviation
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 P	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 C	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.

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

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

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

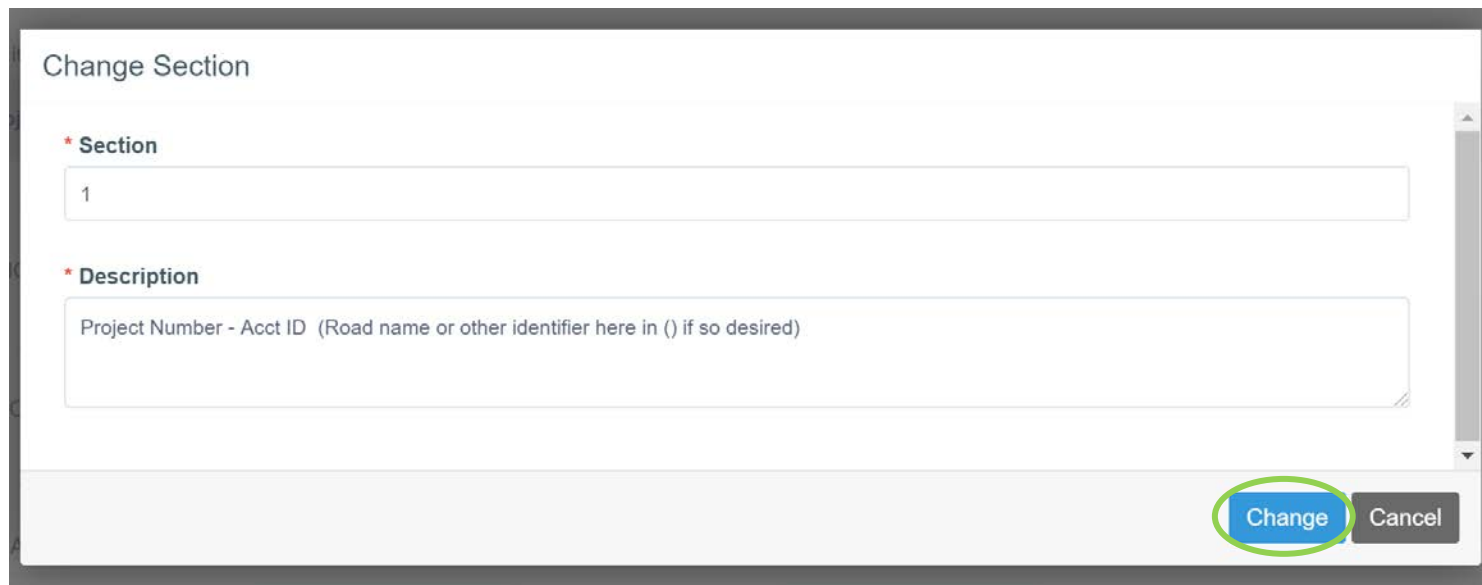
The screenshot shows the Appia interface with the 'Items' table. The 'Actions' dropdown menu is open for the first item, and the 'Edit' option is circled in green.

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

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

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

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



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


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

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


Displaying all 15 items

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


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




OVERVIEW




ALL REPORTS



ITEMS



TIME LIMITS



Projects / Winnebago Multiple Sections / Items / Edit Items

Winnebago Multiple Sections

New

February Letting: 02/18/20

Advance to Construction

Reports ▾

Items

Save

Add Section

Cancel

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

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

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

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

The screenshot displays the 'My Projects' page in the Appia application. The left sidebar contains navigation links: MY PROJECTS (highlighted in red), REFERENCE DATA, SYSTEM MGT, EXPORT DATA, and HELP. The top right corner features a notification bell, 'MY ACCOUNT', and 'LOGOUT' links. Below the 'Projects' header, there are two buttons: 'Create Project' (labeled with a green box and '1') and 'Import Project' (labeled with a green box and '2'). A search bar labeled 'Find Project' and a status filter set to 'Under Construction' are also present. The main content area shows a table of projects under construction.

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

Method #2 – Importing a project

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

The .json file for DOT-let projects can be obtained from Derek Peck. Please send requests to Derek at Derek.Peck@iowadot.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.

The screenshot displays the Appia system interface. At the top, there are tabs for 'Projects', 'Contractors', 'Bid Items', and 'Officials'. Below these is a search bar and two buttons: 'Add Project' and 'Import From TPMS'. A notification banner at the top right states: 'This project has been Closed. Changes are no longer allowed.' Below this, there are two buttons: 'Appia Export' (highlighted with a green circle) and 'Remove Project'. The main area is divided into two panels. The left panel is a table with columns: 'Letting...', 'Project Nu...', 'Name', 'Bid...', and 'Sta...'. It lists several projects, including 'Bridge 09041 Materials', 'Columbia 31 Bridge Materi...', 'Columbia Stub Resurfacing', 'Buckingham Pavement', 'T47 / E29 / UGL Resurfacing', and 'Bridge 10342'. The right panel is a log of actions, with columns: 'Date', 'Action', 'Initiator', and 'Message'. It shows a series of actions performed on the project, including 'Closed Project', 'Locked Award of Contract', and 'Edited/created Form of Contract'. The 'Appia Export' button is located between the notification banner and the log panel.

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

Date	Action	Initiator	Message
8/8/2014 08:21 am	Closed Project	Nicole Stinn	New Value: Project Closed Old Value: Project Active
4/29/2013 08:38 am	Locked Award of Contract	Nicole Stinn	Old Value: UnLocked New Value: Locked
4/29/2013 08:37 am	Edited/created Form of Contract	Nicole Stinn	Old Value: ThisAgrmnt: THIS AGREEMENT made and entered by and between _CountyName_ County, Iowa, by its Board of Supervisors consisting of: _CountyBoardMembers_ , Contracting Authority, and _ContractorName_ of, _ContractorCity_ , _ContractorState_ _ContractorZipCode_ , Contractor. New Value: ThisAgrmnt: THIS AGREEMENT made and entered by and between TAMA County, Iowa, by its Board of Supervisors consisting of: Kendall Jordan, Chairperson, Dan Anderson and Larry Vest, Contracting Authority, and Manatts, Inc. of, Newton, IA 50208, Contractor.
4/29/2013 08:37 am	Edited/created Form of Contract	Nicole Stinn	Old Value: Witnesseth: WITNESSETH: That the contractor, for and in consideration of _ContractAmountText_ (_ContractAmtNumeric_) payable as set forth in the specifications constituting a part of this contract, hereby agrees to construct in accordance with the plans and specification

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

- For projects imported prior to the implementation of the Iowa DOT Reference Data Collection (January 2025), 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](#) section of this manual for further guidance on how to do this. 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. See the [Reference Data: Lists > B. Editing Lists](#) section of this manual for further guidance on how to do this. Change order types should contain the following:
 - Substantial
 - Non-Substantial
- Material Forms List. Ensure items have been added to this list for payrolls and liquidated damages. See the [Reference Data: Bid Items & Materials > Adding New Materials](#) and the [Reference Data: Lists > B. Editing Lists](#) sections 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 Regional Field Engineer and Technician (highway projects), or Discretionary Grant Engineer and Technician (discretionary grant/earmark projects), or Grant Manager (non-highway projects), Secondary Roads Engineer, and E-Construction Administrator as users with Read-Only access. See the [Default Settings: Users - Adding/Deleting, Roles, Project Access, Licenses](#) section of this manual for further guidance on how to do this.

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

The screenshot displays the 'My Projects' interface. On the left is a dark sidebar with navigation options: 'MY PROJECTS' (highlighted in red), 'REFERENCE DATA', 'SYSTEM MGT', 'EXPORT DATA', and 'HELP'. The main content area is titled 'My Projects' and includes a search bar labeled 'Find Project', a status filter set to 'Under Construction', and an 'Advanced' view toggle. Below this is a table titled 'Under Construction' with columns for 'Project ID' and 'Description'. The table lists six projects, three of which are marked as 'Imported' with a yellow tag. The 'Import Project' button in the top right corner is circled in green.


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

This window will appear. Click on the “Select file” button and browse to select the .json file you have saved on your device. Also, for DOT-administered projects (DOT-let projects for cities), select the Iowa DOT Reference Data Collection from the SHARED COLLECTIONS section of the “Select a reference collection” drop-down menu.

Import Project File

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

Download the [sample project file](#).



Select a Project File

46-C046-085_SctNm_LSi... Select File

Select a reference collection

Select Reference Collection ^

IOWA LOCAL SYSTEMS _DEMO
ACCOUNT COLLECTIONS

Iowa Local Systems _DEMO
ACCOUNT reference

SHARED COLLECTIONS

**Iowa DOT Reference Data
Collection (Current)**

Iowa Local Systems _DEMO
ACCOUNT


Import Cancel

Click on the “Import” button once you have chosen the appropriate file and reference data collection.

Import Project File

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

Download the [sample project file](#).



Select a Project File

46-C046-085_SctNm_LSi... Select File

Select a reference collection

Iowa DOT Reference Data Collection (Current) ▼

Import Cancel

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

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

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

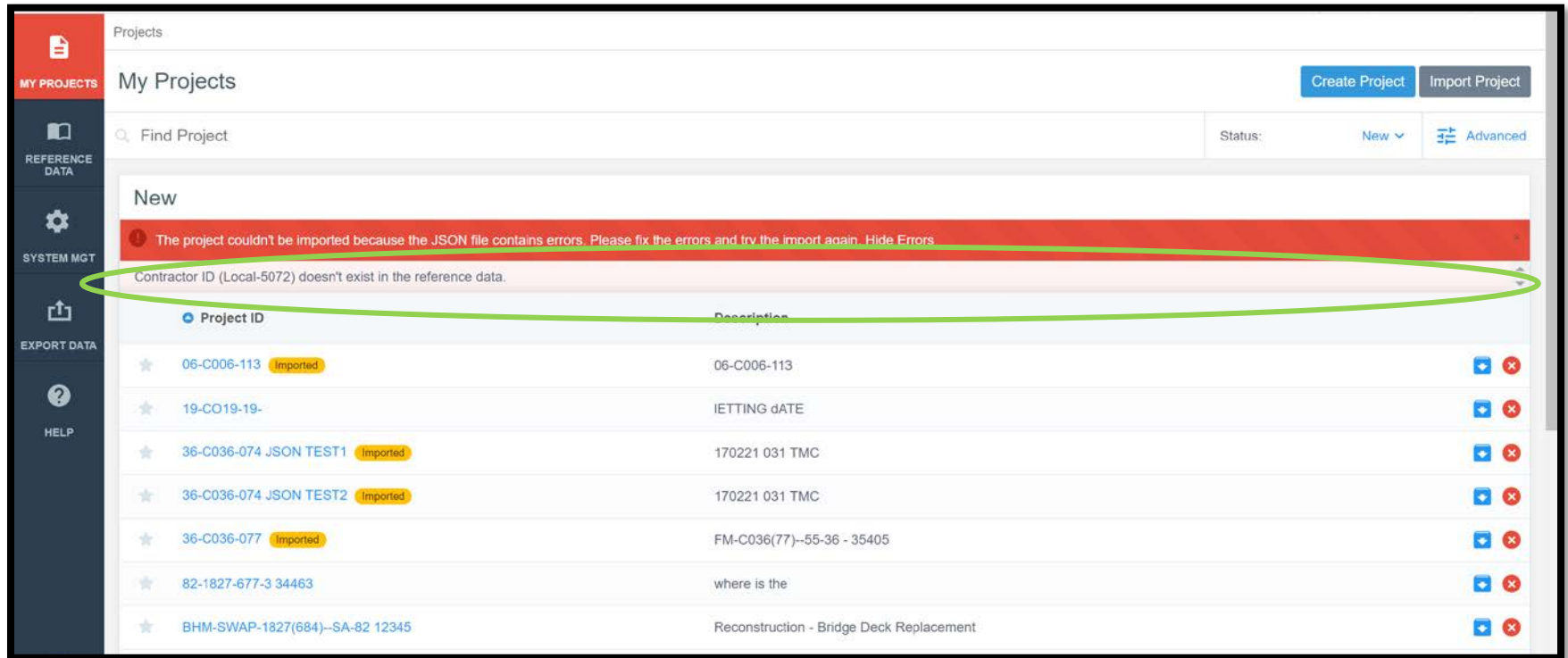
Now, add the necessary Read-Only users to your imported project. See the [Project Settings > Project Security Settings: Project-Specific Users and Roles](#) section for a list of necessary users and for guidance on adding those users.

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

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

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

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



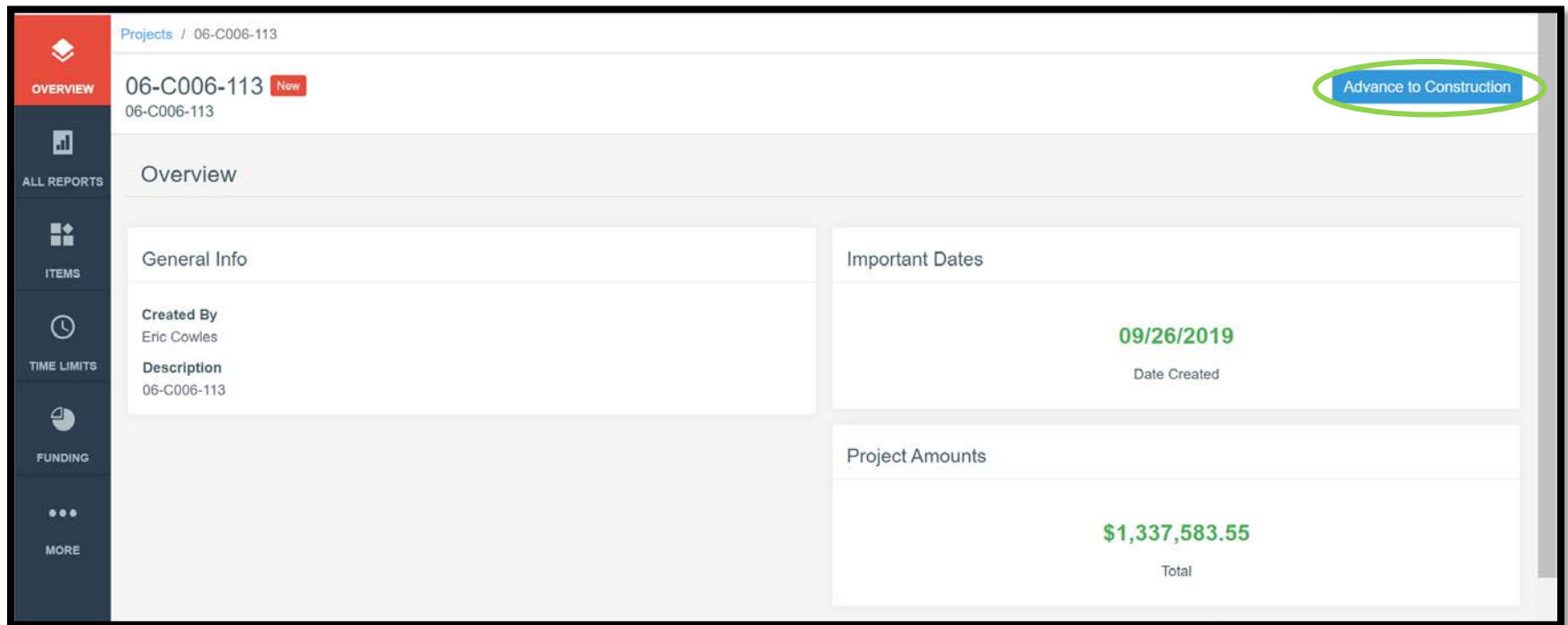
The screenshot shows the 'My Projects' page in a web application. At the top, there's a 'Projects' header and a 'My Projects' title. On the right, there are buttons for 'Create Project' and 'Import Project'. Below the title, there's a search bar labeled 'Find Project' and a status filter set to 'New'. A 'New' section contains a red error message: 'The project couldn't be imported because the .JSON file contains errors. Please fix the errors and try the import again. Hide Errors'. Below this, a lighter red ribbon lists the errors: 'Contractor ID (Local-5072) doesn't exist in the reference data.' A green oval highlights this error message. Below the error, there's a table with columns 'Project ID' and 'Description'. The table lists several projects, some marked as 'Imported'.

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

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

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

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



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

***Special notes regarding .json files:

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

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

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

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

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

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

Some examples of non-revisable details/settings include:

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

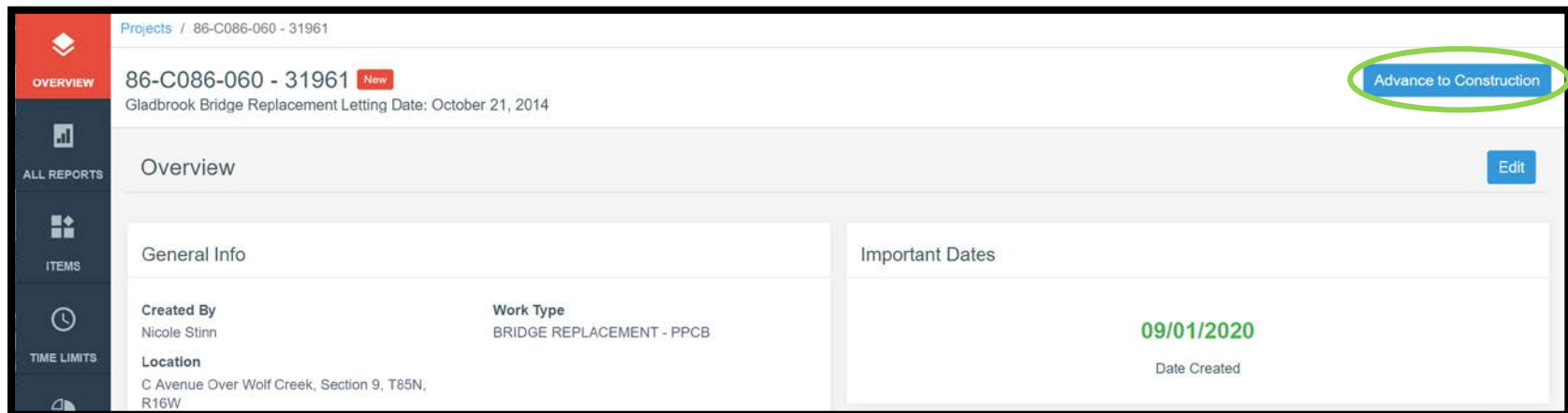
Some settings can only be revised via change order after a project is “Advanced to Construction”. Examples of these settings include:

- time limits and
- funding packages/sources.

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

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

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



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

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

- **Project Settings:** Check the boxes next to the three settings if they are correct. If not, go back to the project settings and correct them. When all of the necessary information has been entered and **double checked**, click on the “Execute” button in the upper, right corner.
 - The correct retainage and payment settings (the first two boxes) can be found in the [Construction Settings: Payment Rules, Worksheet Rule, Daily Report Rules](#) section, and the awarded amount can be found on the project’s contract. The contract can be accessed via Doc Express.

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

Projects / 06-C006-119 / Advance to Construction

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

Advance Project To Construction

Execute **Cancel**

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

Project Manager
Niki Stinn

Work Type
RCB CULVERT NEW - TWIN BOX

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

Construction Start Date

Managing Office
Local Systems

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

*** Please confirm the following project settings.**
☒ Retainage will be at \$30,000.00.
☒ Payment will be made up to \$50,000.00 over an item's authorized amount.
☒ The Awarded Amount is \$259,701.60.

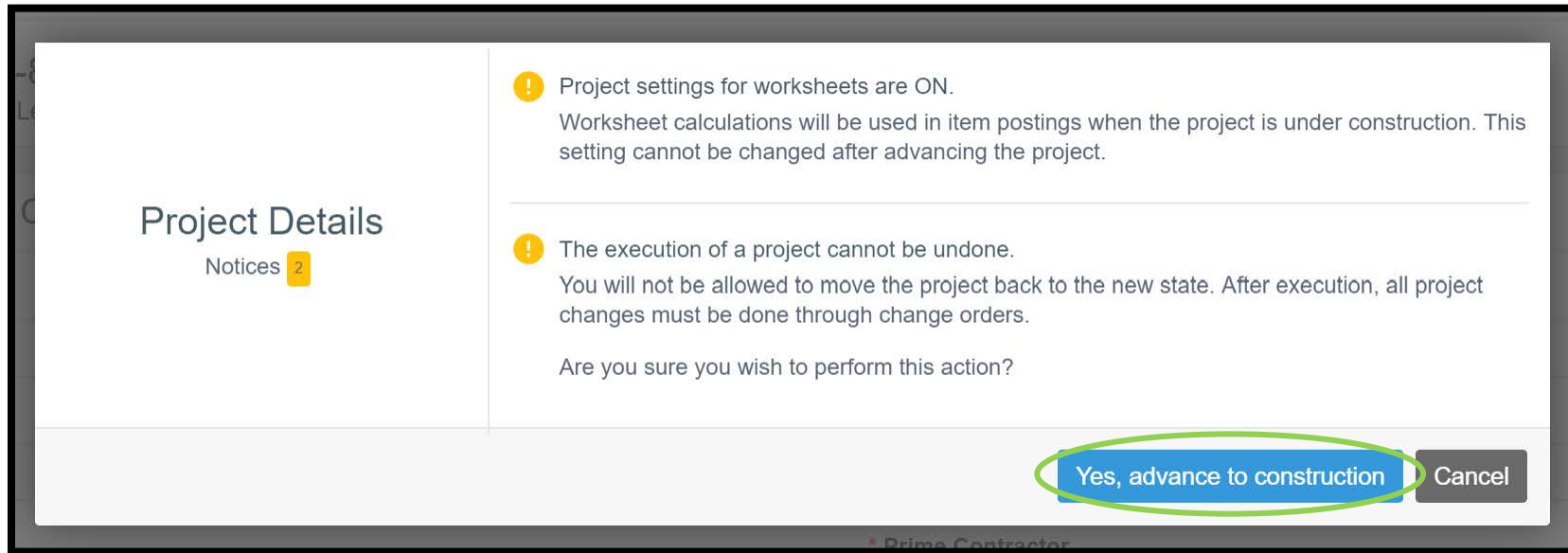
Project Location

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

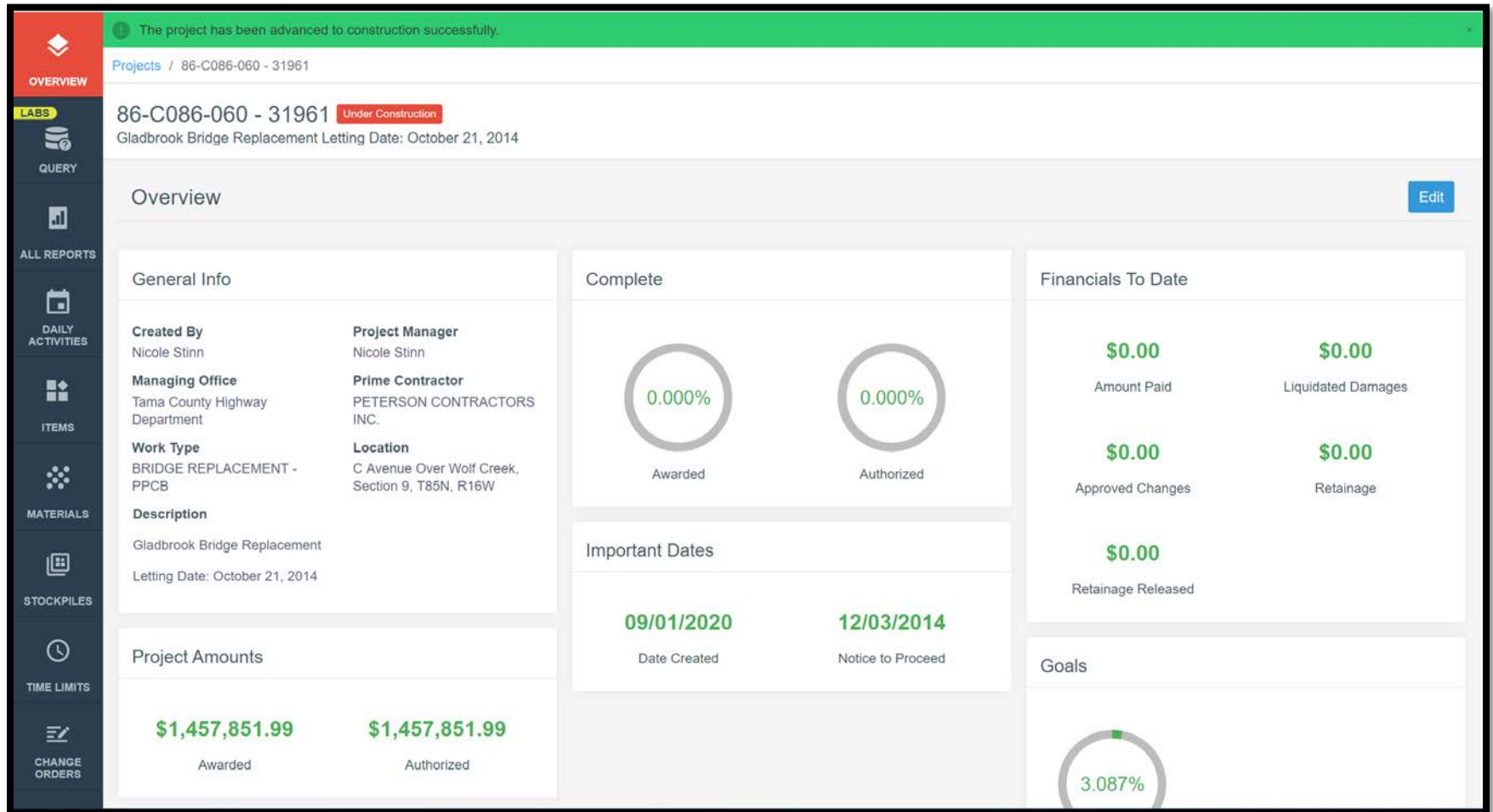
Coordinates
[Search field with magnifying glass and close icons]

Help **Chat**

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



The following screen should appear.



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

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

(System Administrator access level required.)

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

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

Projects

My Projects

Find Project

Create Project Import Project

Status: Under Construction Advanced

Under Construction

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

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

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

Users

Select the user options menu to remove or change license sets

Manage licenses **Add Users**

You cannot remove users with devices.

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

The following Local Systems Bureau staff need to be added to your default/global user list. See the [Local Systems Contact Us website](#) for bureau personnel.

- The appropriate regional Field Engineer or Discretionary Grants Engineer, as applicable (Local Systems Highway/Bridge projects)
- The appropriate regional Field Technician or Discretionary Grants Technician, as applicable (Local Systems Highway/Bridge projects)
- The Grant Manager (Local Systems Grant Team projects)
- The Secondary Roads Engineer (All projects)
- The e-Construction Administrator (All projects)
- The Agreements Specialist (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.

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

Users

Manage licenses Add Users

You cannot remove users with devices.

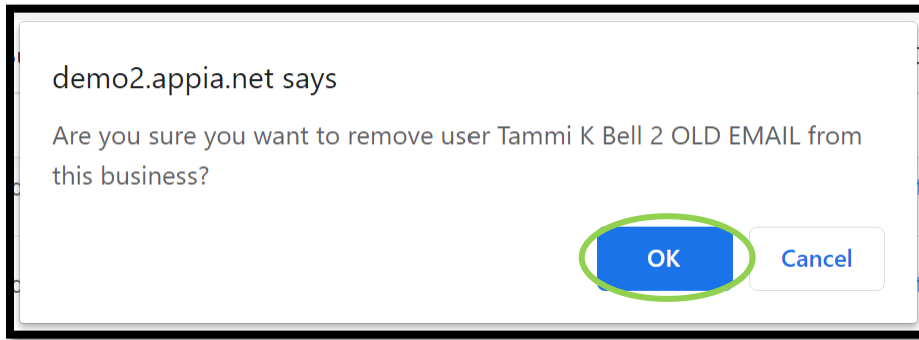
Name	Email	Default Role	Projects	API Access	
Unlicensed users 1					
NM Nicole Moore iowa Local Systems _DEMO ACCOUNT	nicole.moore@iowadot.us	Reviewer	15	OFF	Devices ...
License set 001 7 of 50 used Expires 06/24/2100 Active					
DH Douglas Heeren iowa Local Systems _DEMO ACCOUNT	douglas.heeren@iowadot.us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

Change role

Move to another license

Remove user...

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



B. Adding a User

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

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

Users

Manage licenses ▾

Add Users

You cannot remove users with devices.

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

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

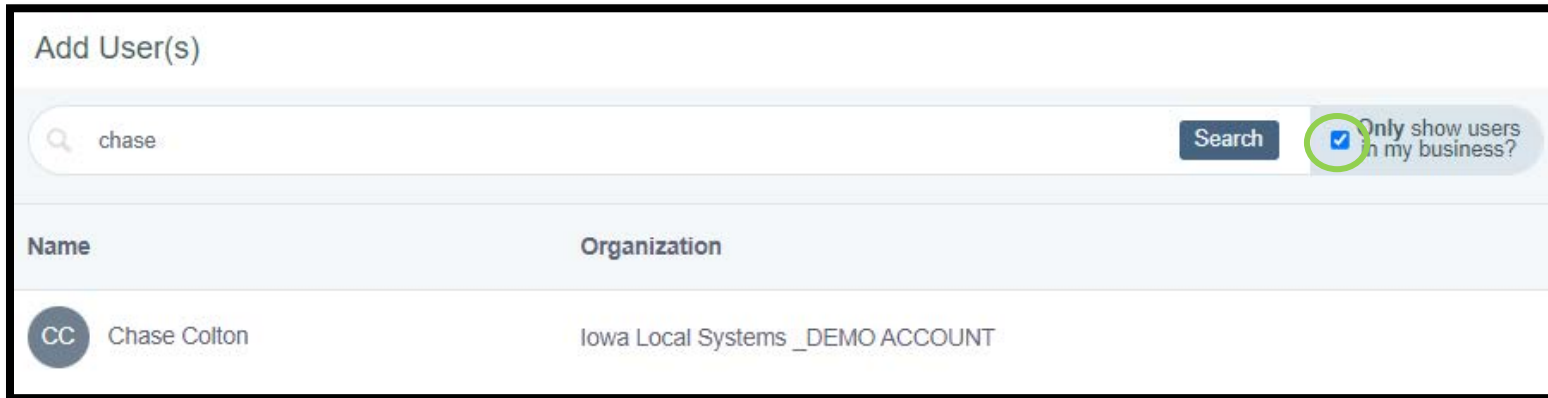
Add User(s)

☐ Only show users in my business?

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

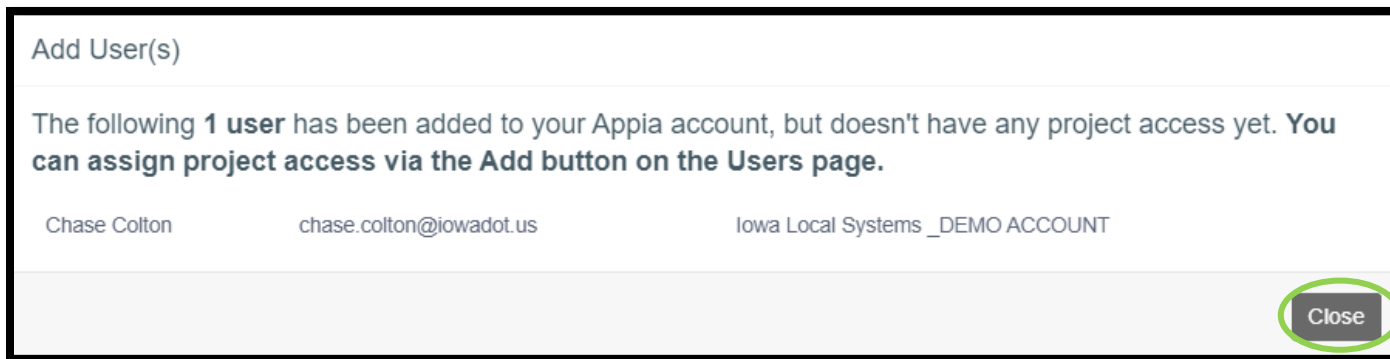
1 User(s)

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



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

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



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

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

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

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

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

My Business

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

Users

Select the user options menu to remove or change license sets

Manage licenses Add Users

You cannot remove users with devices.

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

C. Editing User Roles

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

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

The screenshot displays the 'Users' management page. At the top, there are three informational banners. Below them, the 'Users' section includes a 'Manage licenses' dropdown and an 'Add Users' button. A warning message states: 'You cannot remove users with devices.' The main table lists users categorized into 'Unlicensed users' and 'License set 001'. The 'Unlicensed users' section contains two entries: Chase Colton (Default Role: Read Only) and Nicole Moore (Default Role: Reviewer). The 'License set 001' section contains four entries: Douglas Heeren (Default Role: System Administrator), Jennifer Basener (Default Role: Senior Project Manager), Nicole Stinn (Default Role: System Administrator), and Sophy Yang (Default Role: System Administrator). The 'Read Only' role for Chase Colton is circled in green.

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

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

Chase Colton
Read Only

Select a role

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

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

Appia role definitions

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

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

Cancel **Next**

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

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

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

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

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

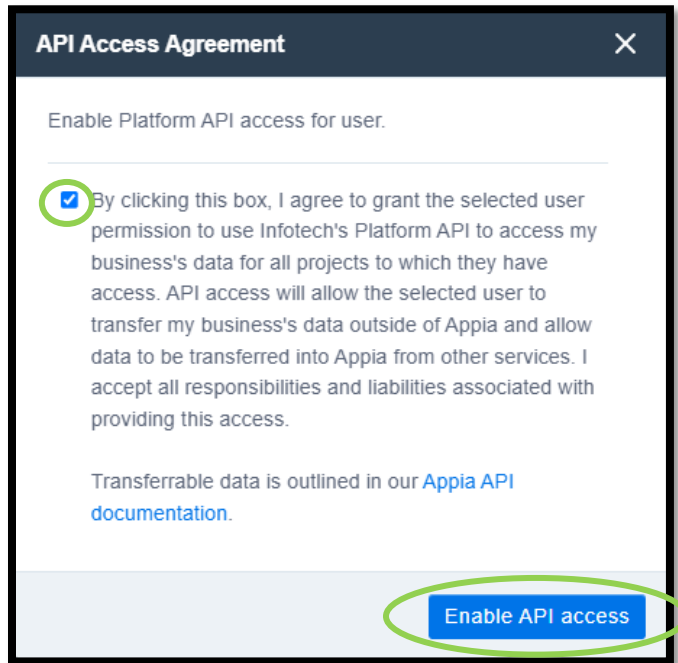
D. Managing API Access

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

The screenshot shows the 'Users' management page in Appia. The left sidebar contains 'DATA', 'SYSTEM MGT' (active), and 'EXPORT DATA'. The main area is titled 'Users' with a subtitle 'Select the user options menu to remove or change license sets'. A blue banner at the top states 'You cannot remove users with devices.' Below this is a table of users. The 'Unlicensed users' section (2 users) is expanded, showing the 'CPS Contractor Pay Finance' user (ID CF) with email 'dot-contractorpay-finance@iowadot.us' and role 'Read Only'. This user's 'API Access' toggle switch is highlighted with a green circle and is currently 'OFF'. Other users include Nicole Moore (NM, Reviewer, 14 projects), Chase Colton (CC, System Administrator, ALL projects), and Douglas Heeren (DH, System Administrator, ALL projects). The 'License set 001' section shows 8 of 50 licenses used, with an expiration date of 06/24/2100 and an 'Active' status.

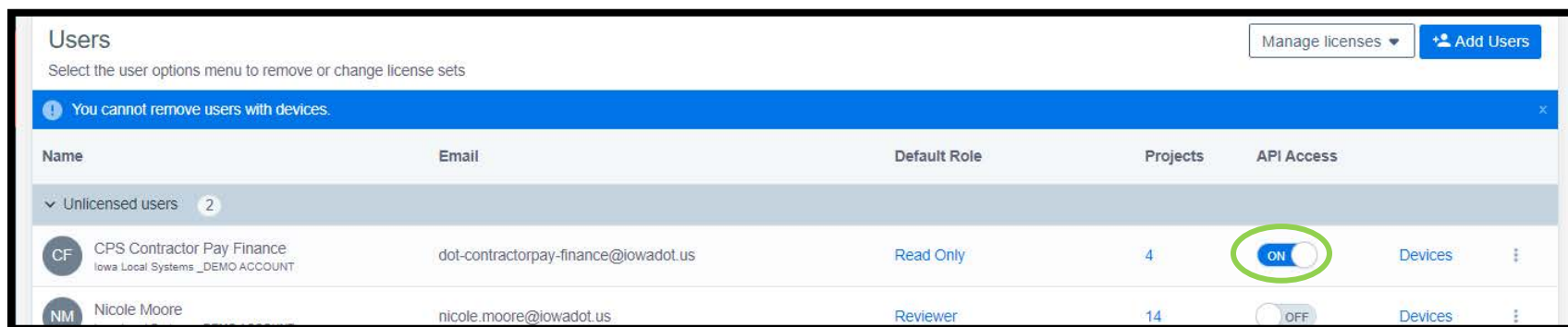
Name	Email	Default Role	Projects	API Access	Devices
Unlicensed users (2)					
CF CPS Contractor Pay Finance <small>Iowa Local Systems _DEMO ACCOUNT</small>	dot-contractorpay-finance@iowadot.us	Read Only	4	OFF	Devices
NM Nicole Moore <small>Iowa Local Systems _DEMO ACCOUNT</small>	nicole.moore@iowadot.us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

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



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

The toggle switch should now be on.



The image shows a "Users" management interface. At the top right are buttons for "Manage licenses" and "Add Users". Below is a blue banner with a warning: "You cannot remove users with devices." The main table has columns: Name, Email, Default Role, Projects, API Access, and Devices. There is a filter for "Unlicensed users" with a count of 2. Two users are listed: "CPS Contractor Pay Finance" (Read Only, 4 projects, API Access ON) and "Nicole Moore" (Reviewer, 14 projects, API Access OFF).

Name	Email	Default Role	Projects	API Access	Devices
Unlicensed users 2					
CF CPS Contractor Pay Finance Iowa Local Systems_DEMO ACCOUNT	dot-contractorpay-finance@iowadot.us	Read Only	4	ON	Devices
NM Nicole Moore	nicole.moore@iowadot.us	Reviewer	14	OFF	Devices

E. Viewing & Editing User Project Access

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

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

Users

Manage licenses ▾ Add Users

Select the user options menu to remove or change license sets

You cannot remove users with devices.

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

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

My Business / Nicole Moore Projects

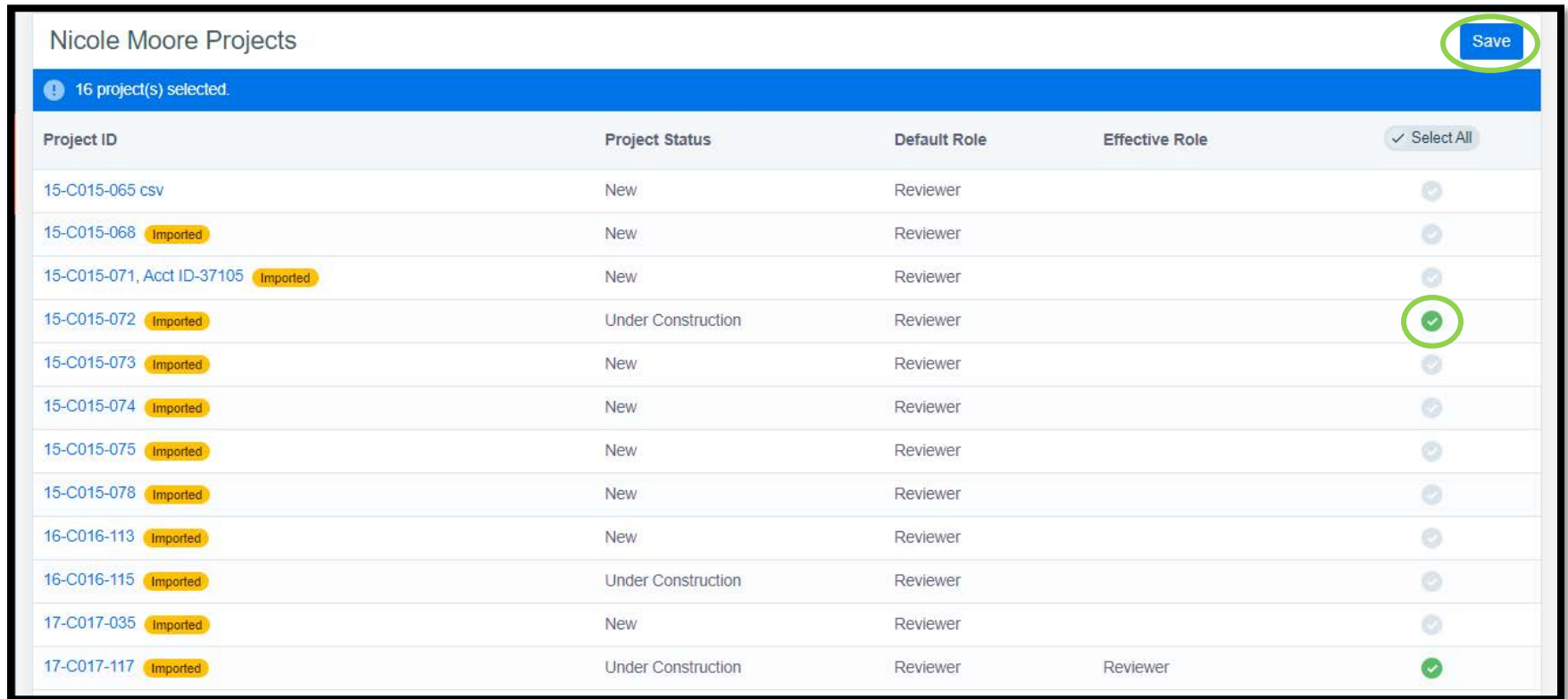
Nicole Moore Projects

15 project(s) selected.

Save

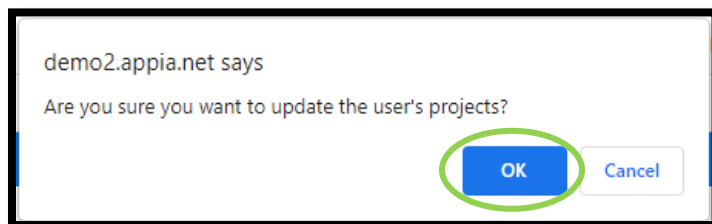
Project ID	Project Status	Default Role	Effective Role	✓ Select All
15-C015-065 csv	New	Reviewer		<input type="checkbox"/>
15-C015-068 Imported	New	Reviewer		<input type="checkbox"/>
15-C015-071, Acct ID-37105 Imported	New	Reviewer		<input type="checkbox"/>
15-C015-072 Imported	Under Construction	Reviewer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

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

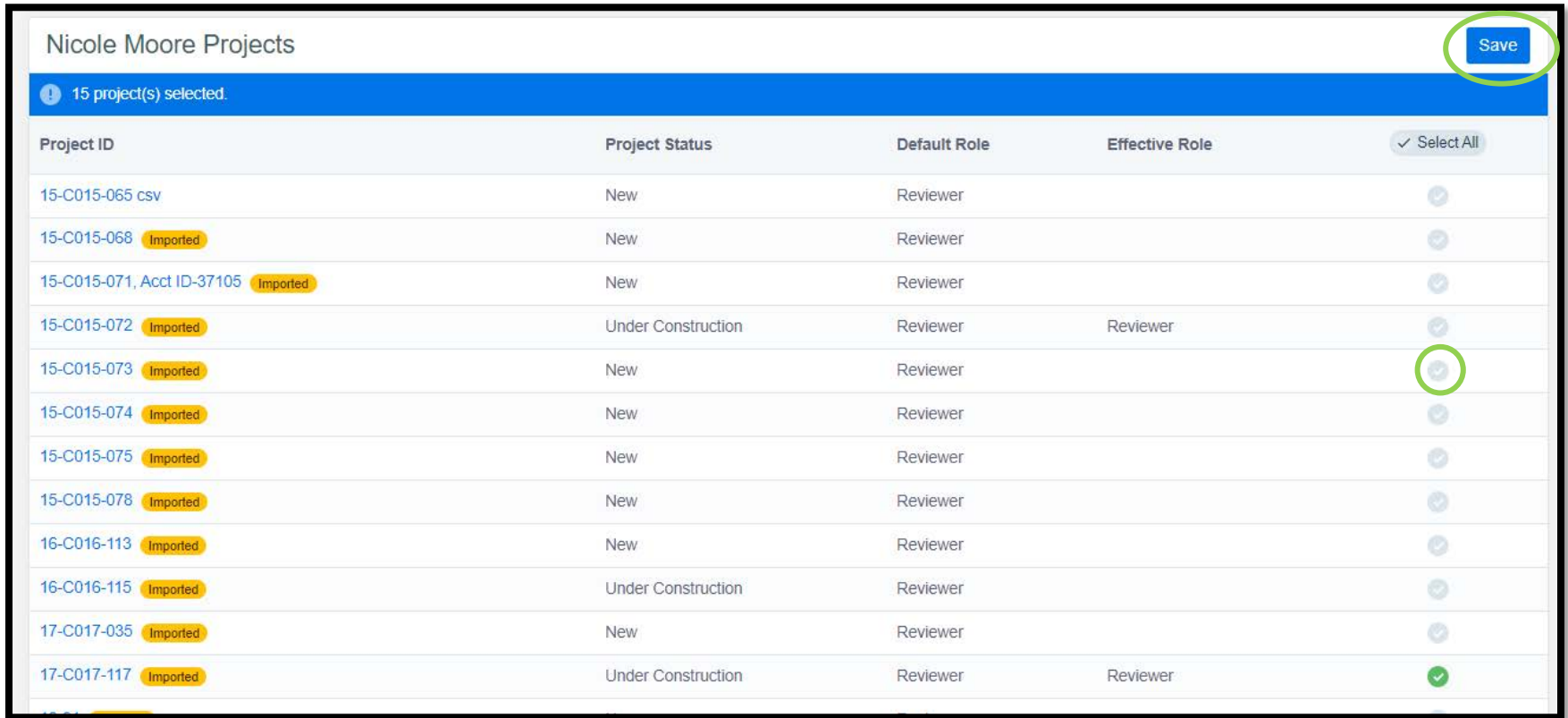


Project ID	Project Status	Default Role	Effective Role	✓ Select All
15-C015-065 csv	New	Reviewer		<input type="checkbox"/>
15-C015-068 Imported	New	Reviewer		<input type="checkbox"/>
15-C015-071, Acct ID-37105 Imported	New	Reviewer		<input type="checkbox"/>
15-C015-072 Imported	Under Construction	Reviewer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

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

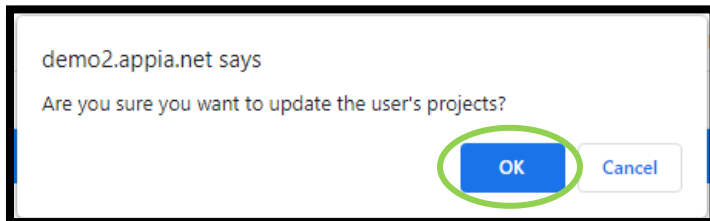


To remove access to a project, simply click on the green circle with the check mark on the right side of the project's line so that it turns gray. Then click the blue "Save" button in the upper, right corner.



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

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



F. Licensing

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

The screenshot shows the 'Users' management interface in the Appia system. A sidebar on the left contains navigation options: 'REFERENCE DATA', 'SYSTEM MGT' (highlighted with a red background), and 'EXPORT DATA'. The main content area is titled 'My Business' and features a blue header with a message: 'New users are set to read-only access (unlicensed) by default and do not require a paid license.' Below this, the 'Users' section includes a sub-header 'Select the user options menu to remove or change license sets' and buttons for 'Manage licenses' and 'Add Users'. A blue banner states 'You cannot remove users with devices.' The user list table has columns for Name, Email, Default Role, Projects, and API Access. It is divided into two sections: 'Unlicensed users' (1 user) and 'License set 001' (8 of 50 used, highlighted with a green circle). The 'License set 001' section shows four users: Nicole Moore (Reviewer, 15 projects), Chase Colton (System Administrator, ALL projects), Douglas Heeren (System Administrator, ALL projects), and Jennifer Basener (Senior Project Manager, 426 projects). Each user row includes a toggle for API Access (all are OFF) and a 'Devices' link.

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

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

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

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

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

12 - Default Settings: Project Settings

(System Administrator access level required.)

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

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

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

Projects

My Projects

Find Project

Create Project Import Project

Status: Under Construction Advanced

Under Construction

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

	Description	
★ Pro tip: Click or tap the star to add a project to your favorite projects. My Projects will default to Favorites at next login if a favorite is selected. Dismiss	03-C003-062	+
★	STP-S-C011(71)--5E-11 - 29427	+
★ 36-C036-074 JSON TEST/FINANCE Imported		+
★ BHM-SWAP-1827(684)--SA-82-1 12345	Reconstruction Bridge Deck	+
★ BROS-C004(103)--8J-04 - 35155	On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.	+
★ BROS-C078(111)--FF-78_Payment for Multiple Sections	Letting Date 4/21/2020	+
★ BROS-C086(60)--8J-86 - 31961	Gladbrook Bridge Replacement Letting Date: October 21, 2014	+
★ BRS-C036(74)--60-36 - AcctID	Letting Date: 04/01/20	+
★ BRS-C036(74)--60-36 - AcctID_02_Central01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	+
★ BRS-C036(74)--60-36 - AcctID_03_West01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	+

A. General Project Settings: Report Names and Logo

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

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

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

Settings

GENERAL CONSTRUCTION

Settings

Changes to the global settings affect only new projects.

Report Display Name

Report Logo

Choose File No file chosen

Report Logo Preference

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

support@appia.net
(888) 352-2439

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

B. Construction Settings: Payment Rules, Worksheet Rule, Daily Report Rules, Final Balancing Change Order Rule

Go to the “System Management” button on the left menu and select “Settings” in the expanded menu.

The screenshot shows the 'My Projects' interface. The left sidebar contains several menu items: 'MY PROJECTS' (highlighted in red), 'REFERENCE DATA', 'SYSTEM MGT' (highlighted with a green circle), 'INTEGRATIONS', 'MY BUSINESS', and 'SETTINGS' (highlighted with a green circle). The main content area is titled 'My Projects' and includes a search bar, 'Create Project' and 'Import Project' buttons, and a 'Status' filter. Below this is a 'Favorites' section with a table of projects.

Project ID	Description	Project Status
★ 01-C001-116 <small>Imported</small>	WORKDAY TEST_FM-C001(116)–55-01, AcctID- 37895, FM-C001(117)–55-01, AcctID- 37896, Letting date- 17 Aug 2021	Construction
★ 01-C001-121 <small>Imported</small>	FM-C001(121)–55-01, Acct ID- 39562, Letting Date- July 18, 2023	Construction
★ 04-C004-116 <small>Imported</small>	FM-C004(116)–55-04, Acct ID- 38373, Letting Date- February 15, 2022	Construction
★ 09-C009-088 <small>Imported</small>	TEST FOR WORKDAY_Correct NTP date_BROS-SWAP-C009(88)–FE-09, AcctID- 37865, Letting Date- 20 July 2021	Construction
★ 15-C015-072 <small>Imported</small>	BROS-SWAP-C015(72)–FE-15, AcctID- 37709, Letting Date- 20 April 2021	Construction
★ 17-C017-035 <small>Imported</small>	BROS-C017(35)–8J-17, Acct ID- 39521, Letting Date- January 17, 2024	Construction
★ 21-C021-153 <small>Imported</small>	STP-S-C021(153)–5E-21, Acct ID- 38934, FM-C021(154)–55-21, Acct ID- 38935, Letting Date- November 15, 2022	Construction
★ 22-C022-096 <small>Imported</small>	FM-C022(96)–55-22, Acct ID- 39588, Letting Date- July 18, 2023	Construction
★ 23-C023-124 <small>Imported</small>	WORKDAY TEST_HDP-C023(124)–6B-23, AcctID- 37929, Letting Date- 17 Aug 2021	Construction

On the Settings screen, choose the second tab called “Construction”.

The screenshot shows the 'Settings' screen with the 'CONSTRUCTION' tab selected. The 'Save' button is circled in green. The settings are as follows:

- Payment Retainage Rule**
 - ☐ Do not cap retainage
 - ☐ Cap retainage at 0.000% of awarded project amount
 - ☐ Cap retainage at 0.000% of authorized project amount
 - ☒ Cap retainage at \$30,000.00
 - ☐ Retain last 0.000% of awarded project amount
 - ☐ Retain last 0.000% of authorized project amount
- Stockpile Retainage Rule**
 - ☐ Retain stockpile advancements?
- Worksheet Calculations Rule**
 - ☒ Use worksheets in Item Postings?

This setting can't be changed in an under construction project.
- Signature Line for Payment Reports**

12pt B I U [text alignment icons] [font color icon] [background color icon] [border icon] [table icon] [link icon] [unlink icon] [preview PDF]
- Payment for Work Overages Rule**
 - ☐ Do not pay over item's authorized quantity
 - ☐ Pay over item's authorized quantity
 - ☐ Pay up to 0.000% over item's authorized quantity
 - ☒ Pay up to \$50,000.00 over item's authorized amount
- Daily Report Carry Over Rules**
 - ☒ Carry Over Personnel to the Daily Report
 - ☒ Carry Over Equipment to the Daily Report
- Daily Diary Carry Over Rules**
 - ☒ Carry Over Personnel to the Daily Diary
 - ☒ Carry Over Equipment to the Daily Diary
 - ☒ Carry Over Item Postings to the Daily Diary
 - ☒ Carry Over Attachments to the Daily Diary
- Final Balancing Change Order Rule**
 - ☐ Require Final Balancing Change Order on Final Payment?

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.

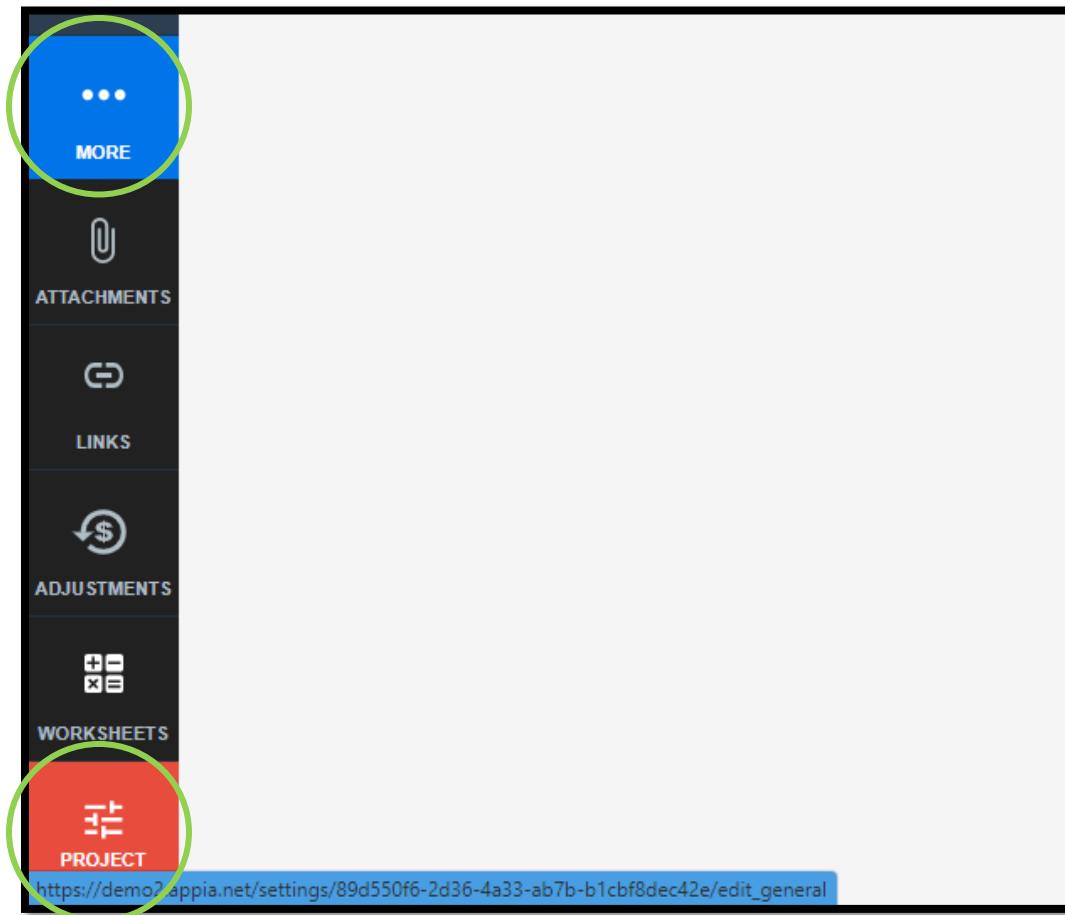
- Stockpile Retainage Rule:
 - If this box is checked, retainage will be withheld from stockpile payments.
 - If this box is left unchecked, no retainage will be withheld from stockpile payments.
 - For Local Agencies, as of November 2023, retainage is being withheld on stockpiles. Therefore, for projects 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.
- Final Balancing Change Order Rule
 - If checked, a balancing change order will be required as part of the final payment process. The Iowa DOT does not require a balancing change order to be completed in order to complete or close a contract. Balancing change orders require additional time and effort that would otherwise not need to be expended. Therefore, we **recommend un-checking this box** so that a balancing change order is not required as part of the final payment. (Currently, a balancing change order must be approved before the final payment report is generated.)
 - Even if this box is un-checked, any Appia® change order can be transformed into a balancing change order with a single click at any time during the project if the LPA so desires. (See the Creating an Auto-Populated Balancing Change Order Using a Standard Change Order subsection in the [Appia “Under Construction” Instructions.](#))

13 - Project Settings

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

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



QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

08-C008-089

Under Construction

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

GENERAL

CONSTRUCTION

INTEGRATIONS

PROJECT SECURITY

Project Settings

SaveCancel

Report Display Name

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

Report Logo Preference

☐ Do not display a logo

☐ Display the Appia product logo

☒ Display your organization's logo

Report Logo

Choose File

No file chosen

IOWA DOT

111

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.

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

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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”

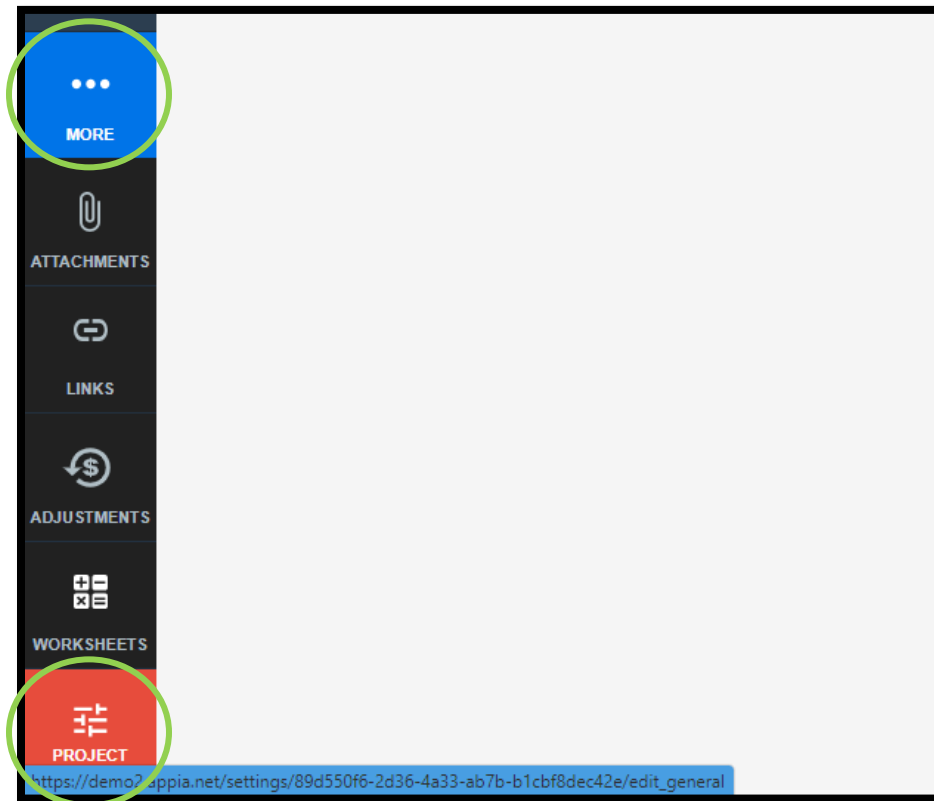
- This option will require a change order in order for payment to be made on an item that exceeds the contract quantity.
- Option 2: “Pay over item’s authorized quantity”
 - This option will allow any quantity to be paid, even if it exceeds the contract quantity.
 - The user is responsible for knowing 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.
- Final Balancing Change Order Rule
 - If checked, a balancing change order will be required as part of the final payment process. The Iowa DOT does not require a balancing change order to be completed in order to complete or close a contract. Balancing change orders require additional time and effort that would otherwise not need to be expended. Therefore, we **recommend un-checking this box** so that a balancing change order is not required as part of the final payment. (Currently, a balancing change order must be approved before the final payment report is generated.)
 - Even if this box is un-checked, any Appia® change order can be transformed into a balancing change order with a single click at any time during the project if the LPA so desires. (See the Creating an Auto-Populated Balancing Change Order Using a Standard Change Order subsection in the [Appia “Under Construction” Instructions](#).)

C. Integrations

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

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

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



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

GENERAL CONSTRUCTION INTEGRATIONS **PROJECT SECURITY**

Project Users Add Users

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

Displaying all 7 users

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

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

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

OVERVIEW

ALL REPORTS

ITEMS

TIME LIMITS

FUNDING

MORE

86-C086-060 - 31961 New

Gladbrook Bridge Replacement Letting Date: October 21, 2014

GENERAL

CONSTRUCTION

PROJECT SECURITY

Project Users

Remove Users

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

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

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

Assign project role to Student #16

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

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

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

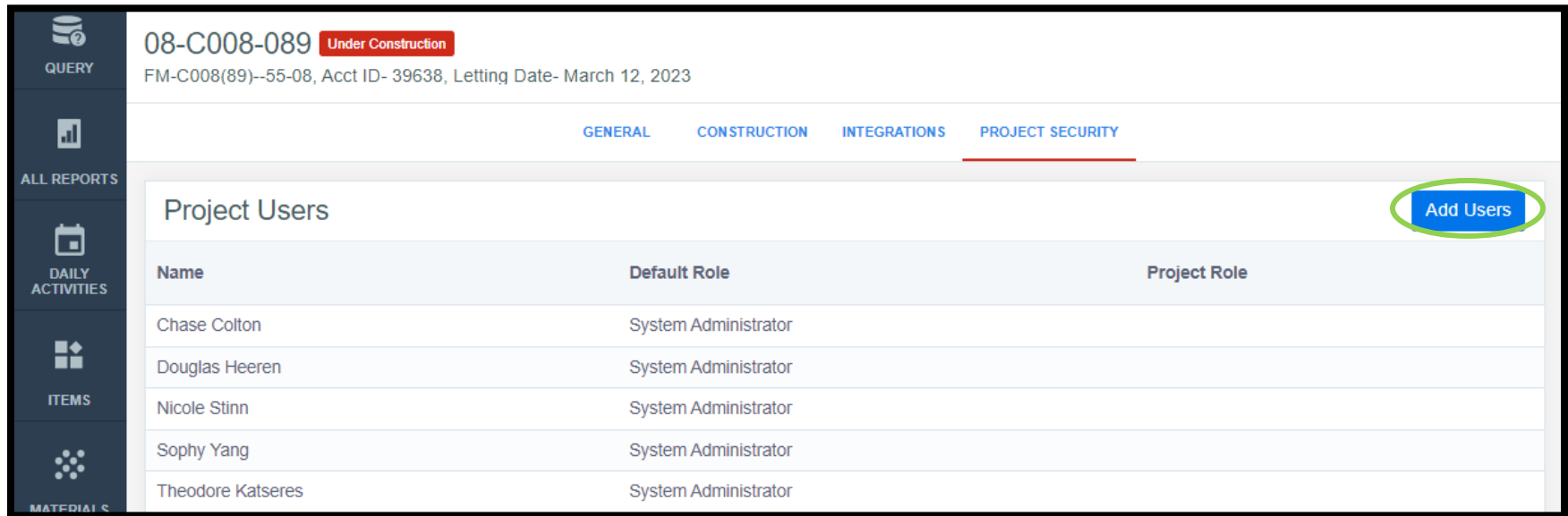
☐ **Project Manager**
Project Managers can only see projects to which they are assigned in the Under Construction and Completed phases. They have full write access to all areas of their assigned projects in these phases.

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

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

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

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



The screenshot displays the 'Project Users' section of a software interface. On the left is a dark sidebar with icons and labels: 'QUERY', 'ALL REPORTS', 'DAILY ACTIVITIES', 'ITEMS', and 'MATERIALS'. The main content area has a header for project '08-C008-089' with a red 'Under Construction' tag and project details. Below this are tabs for 'GENERAL', 'CONSTRUCTION', 'INTEGRATIONS', and 'PROJECT SECURITY'. The 'Project Users' table lists five users, all with the 'System Administrator' role. A blue 'Add Users' button is circled in green in the top right corner of the table area.

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

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

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

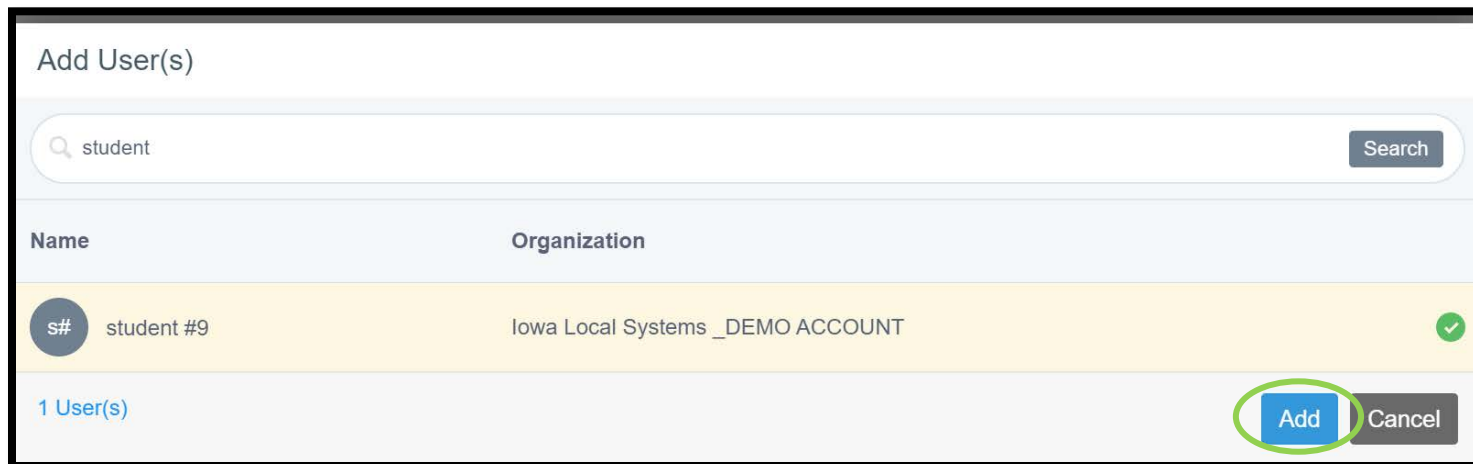
Note: If the user cannot be found, they may not have been added to your Appia account yet. In that case, you will need to go to the “My Account” page and add them. (See the [Setting Up Appia & "My Account" Screen](#) section of the instructional manual.)



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

Name	Organization
s# student #9	Iowa Local Systems _DEMO ACCOUNT

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".



This screenshot shows the same "Add User(s)" dialog box, but the user "student #9" is now selected. The row containing the user's name is highlighted in yellow. A green circle with a checkmark appears on the right side of this row. The search bar now contains the text "student". At the bottom left, it says "1 User(s)". The "Add" button at the bottom right is circled in green.

Name	Organization
s# student #9	Iowa Local Systems _DEMO ACCOUNT

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

The user has been added.

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

Projects / 08-C008-089 / Settings

08-C008-089 Under Construction

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

GENERAL CONSTRUCTION INTEGRATIONS **PROJECT SECURITY**

Project Users Add Users Remove Users

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

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

✓ Select All

The following Local Systems and Finance Bureau staff need to be added to projects with DOT involvement or oversight. See the [Local Systems Contact Us website](#) for contact information if needed.

- The appropriate regional Field Engineer or Discretionary Grants Engineer, as applicable (Local Systems Highway/Bridge projects)
- The appropriate regional Field Technician or Discretionary Grants Technician, as applicable (Local Systems Highway/Bridge projects)
- The Grant Manager (Local Systems Grant Team projects)
- The Secondary Roads Engineer (All projects)
- The e-Construction Administrator (All projects)
- The Agreements Specialist (All projects)
- The Finance Bureau (name of user = CPS Contractor Pay Finance) – For county projects on the Farm-to-Market System let on or after January 2024
 - The API Access must be toggled on for this user. See the [Managing API Access](#) subsection for guidance.

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

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

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

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

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

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

14 - Exporting Data: Export Project

(System Administrator access level required.)

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

The screenshot displays the 'My Projects' interface. The left sidebar menu includes 'MY PROJECTS', 'REFERENCE DATA', 'SYSTEM MGT', 'EXPORT DATA', 'EXPORT PROJECTS', 'EXPORT REPORTS', and 'HELP'. The 'EXPORT DATA' and 'EXPORT PROJECTS' items are circled in green. The main content area is titled 'My Projects' and shows a search bar, a status filter set to 'Under Construction', and a table of projects. A 'Pro tip' box in the top right corner states: 'Pro tip: Projects statuses are located here. Click or tap to select a different status than the one showing. Dismiss.' The table lists projects with columns for star icons, project IDs, descriptions, and action buttons.

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

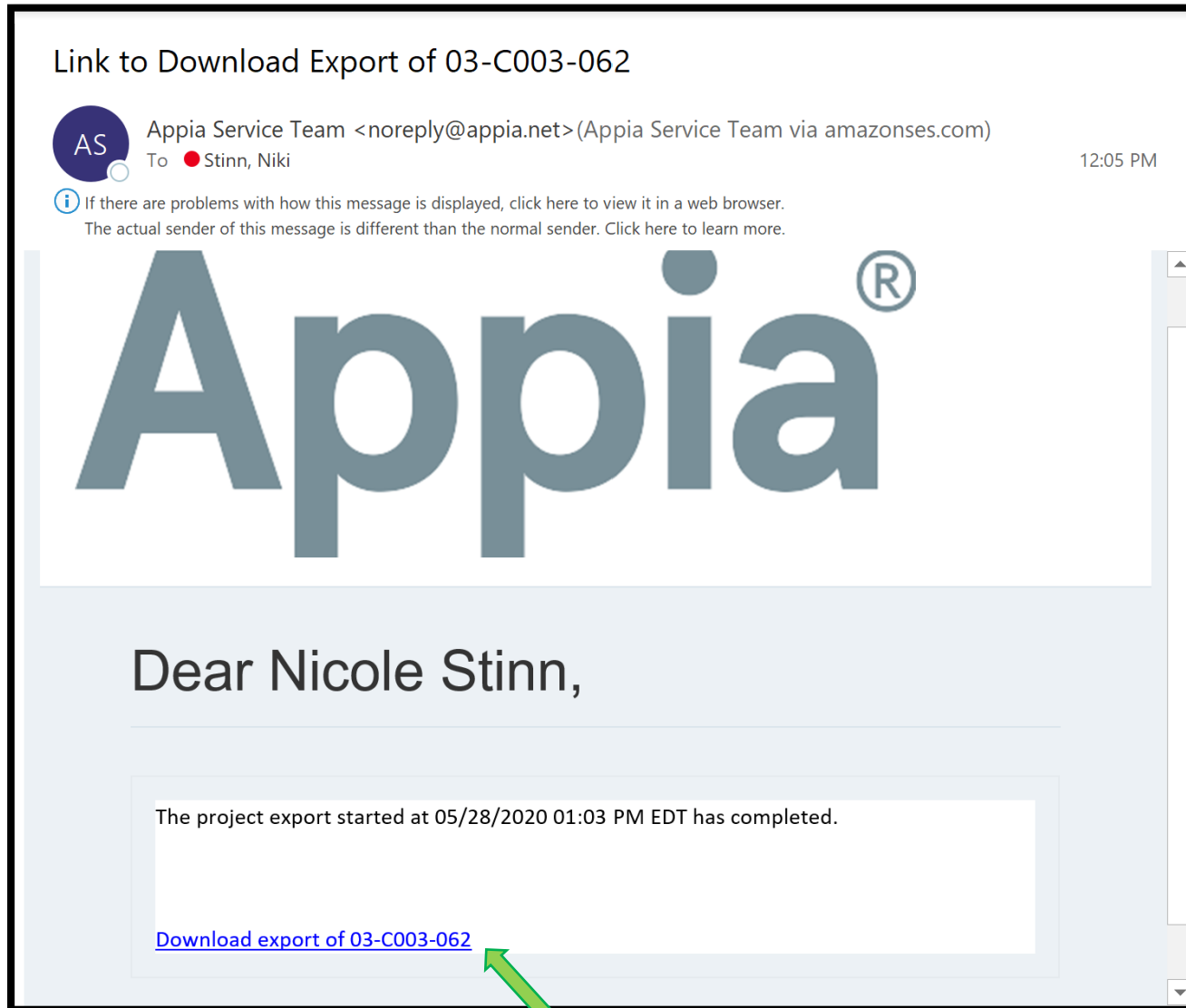
Push the “Export Project” button to download the data for the desired project. This is the blue circle with the down arrow on the right side of the line listing the project.

The screenshot shows a web application interface for managing projects. A green status ribbon at the top reads: "Export is in progress. You will receive an email with a link to download the export once it is done." Below this is a sidebar with navigation options: MY PROJECTS, REFERENCE DATA, SYSTEM MGT, EXPORT DATA (highlighted in red), and HELP. The main content area is titled "Export Projects" and contains a table of projects. The table has columns for Project ID, Description, and Project Status. Each row has a blue circle with a down arrow on the right side, which is circled in green in the image. The table lists several projects, including "03-C003-062", "11-C011-071", "36-C036-074 JSON TEST/FINANCE", "BHM-SWAP-1827(684)--SA-82-1 12345", "BROS-C004(103)--8J-04 - 35155", "BROS-C078(111)--FF-78_Payment for Multiple Sections", "BROS-C086(60)--8J-86 - 31961", and "BRS-C036(74)--60-36 - AcctID".

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

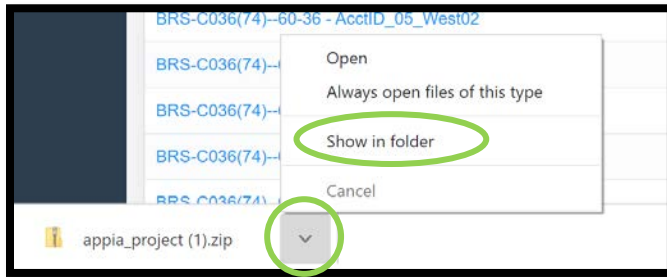
After pushing the “Export Project” button, a green ribbon will appear across the top of the screen saying that the download is in progress, and you will receive an email link once it is done.

The email will look like this.

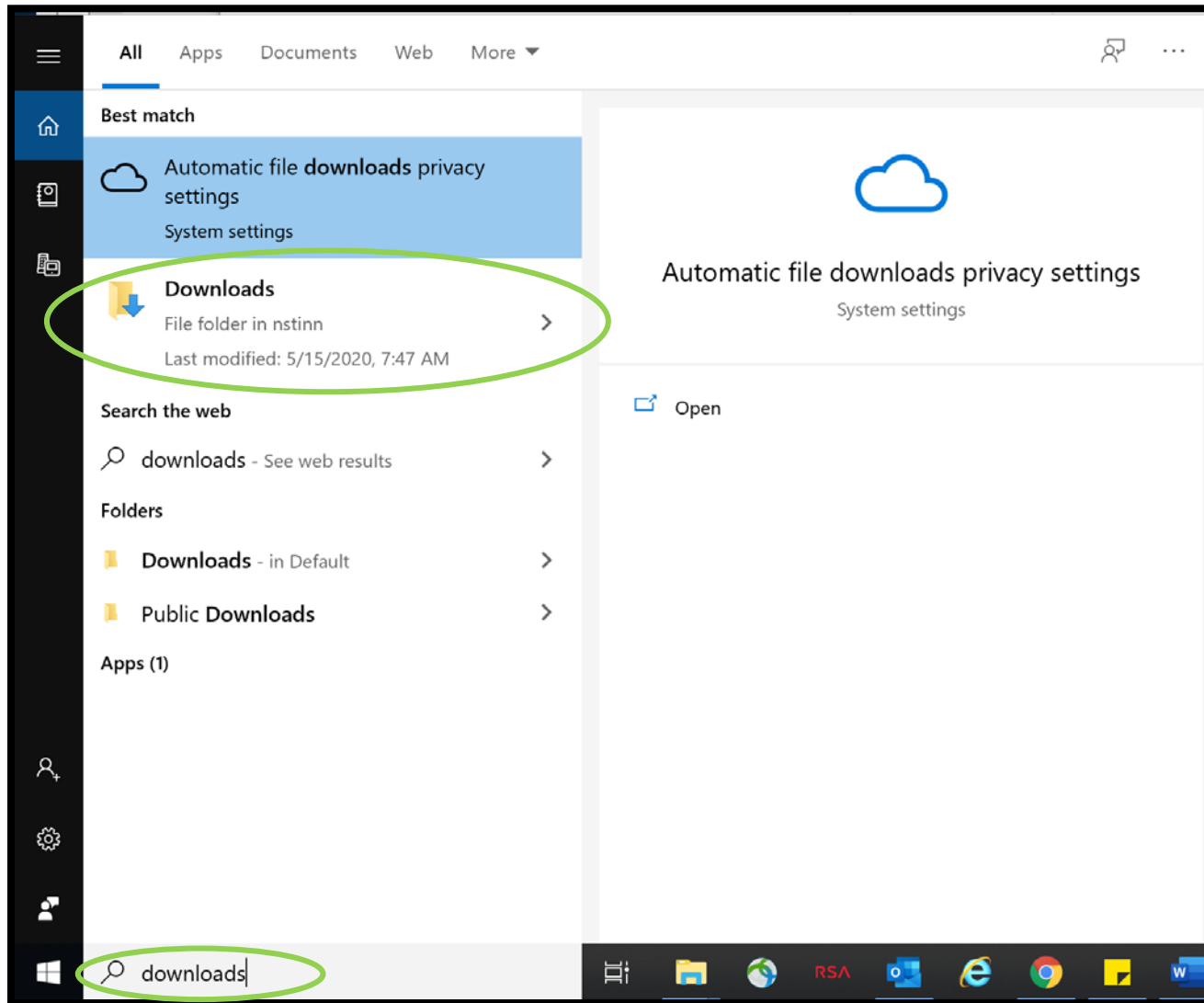


Click on the link here to download the project data.

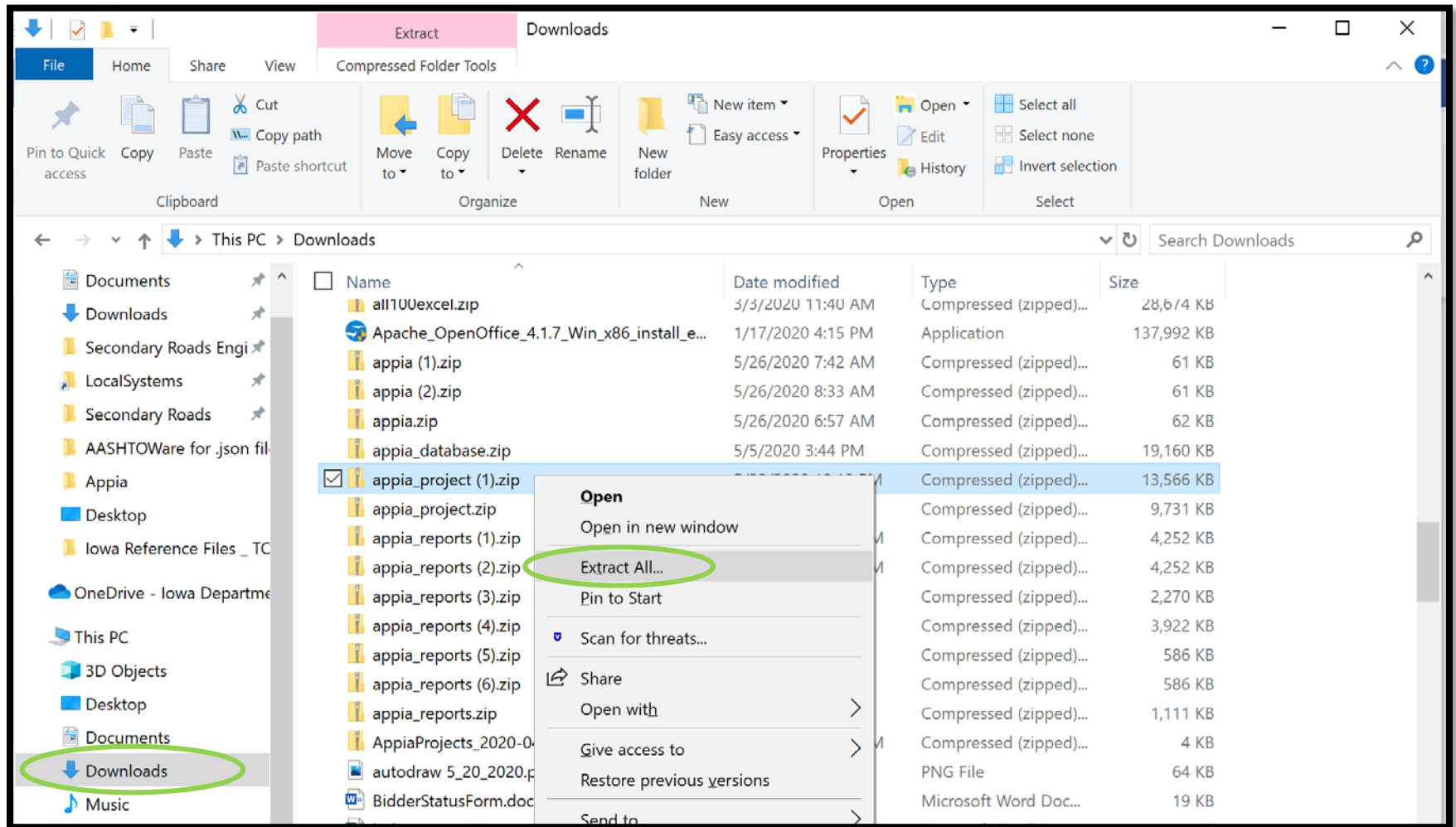
Depending on your browser, your file download may show up at the bottom like this. Click on the arrow to the right of the file name and then “Show in folder” to view the files.



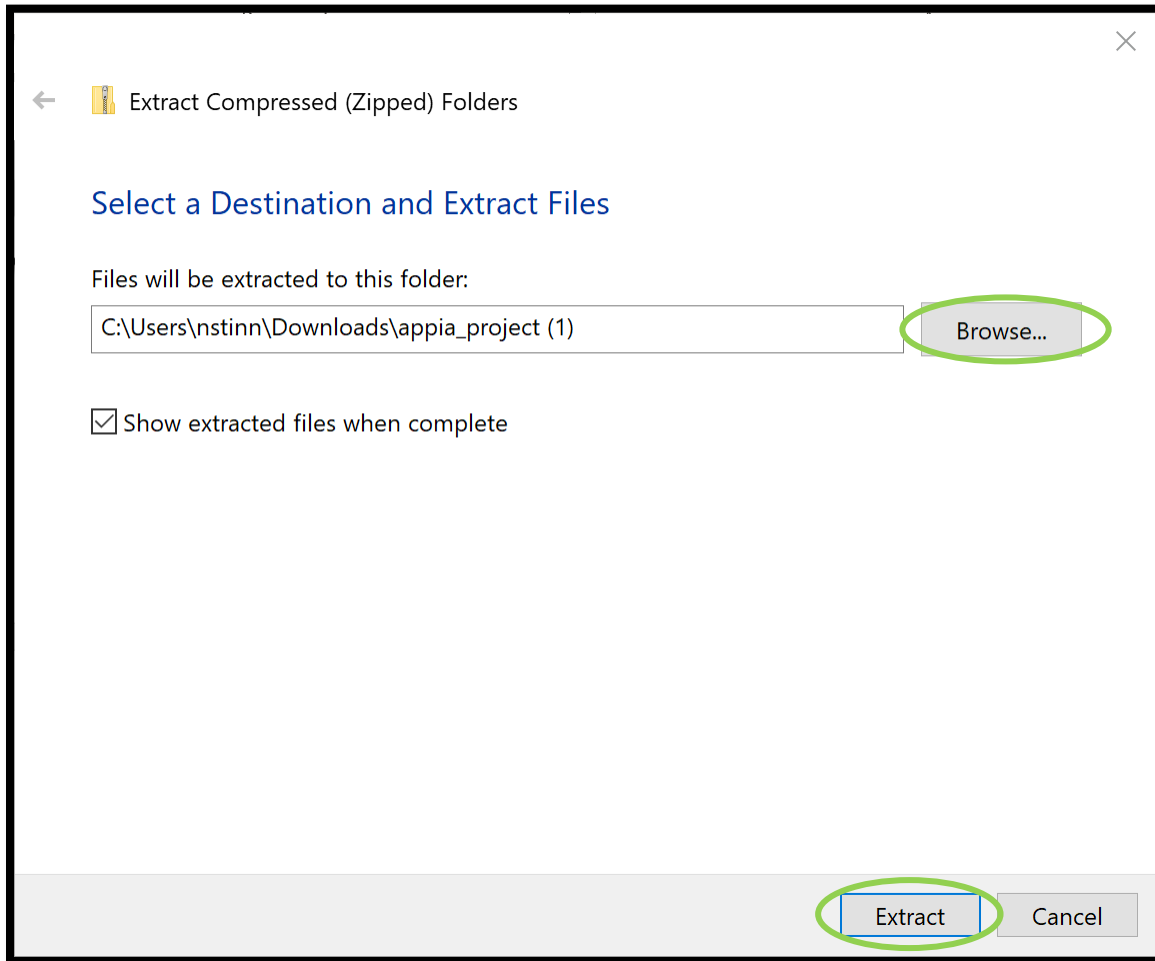
Alternately, once you have clicked on the link in the email, your zipped file can be found in the “Downloads” folder in your file explorer. The “Downloads” folder can be found by typing “downloads” in your search bar.



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

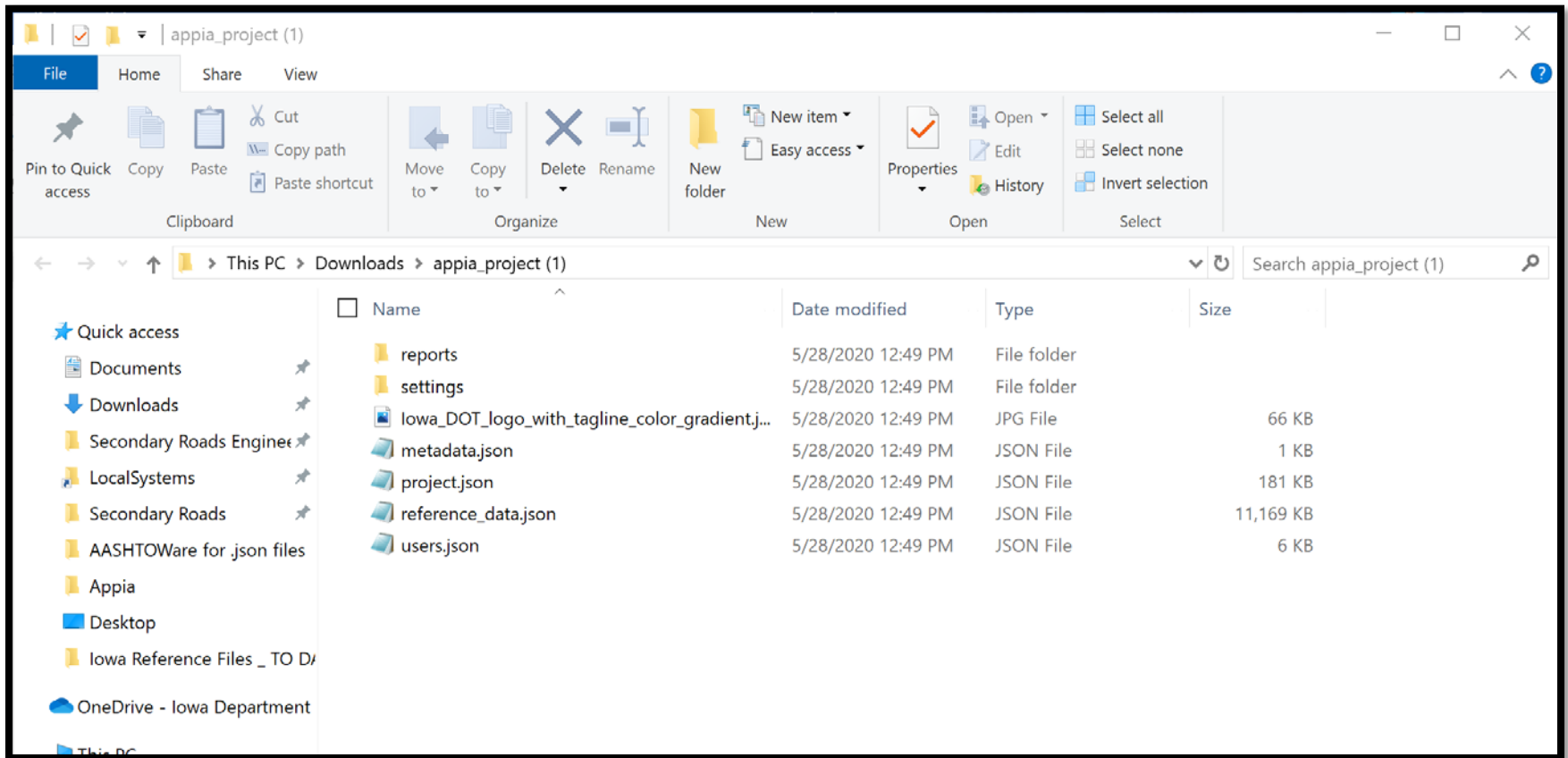


This window will pop up. Browse to find the location where you would like to save your project data.



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

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



15 - Exporting Data: Export Reports

(System Administrator access level required.)

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

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

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

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

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

Export Projects

Projects

Search for Name or Description Search

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

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

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

Export Reports

You can only export reports for under construction projects.

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

* Start Date
05/28/2020

* End Date
05/28/2020

* Reports

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

support@appia.net
(888) 352-2439

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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.

Export is in progress. You will receive an email with a link to download the export once it is done.

My Projects

Find Project

Create Project Import Project

Status: Under Construction Advanced

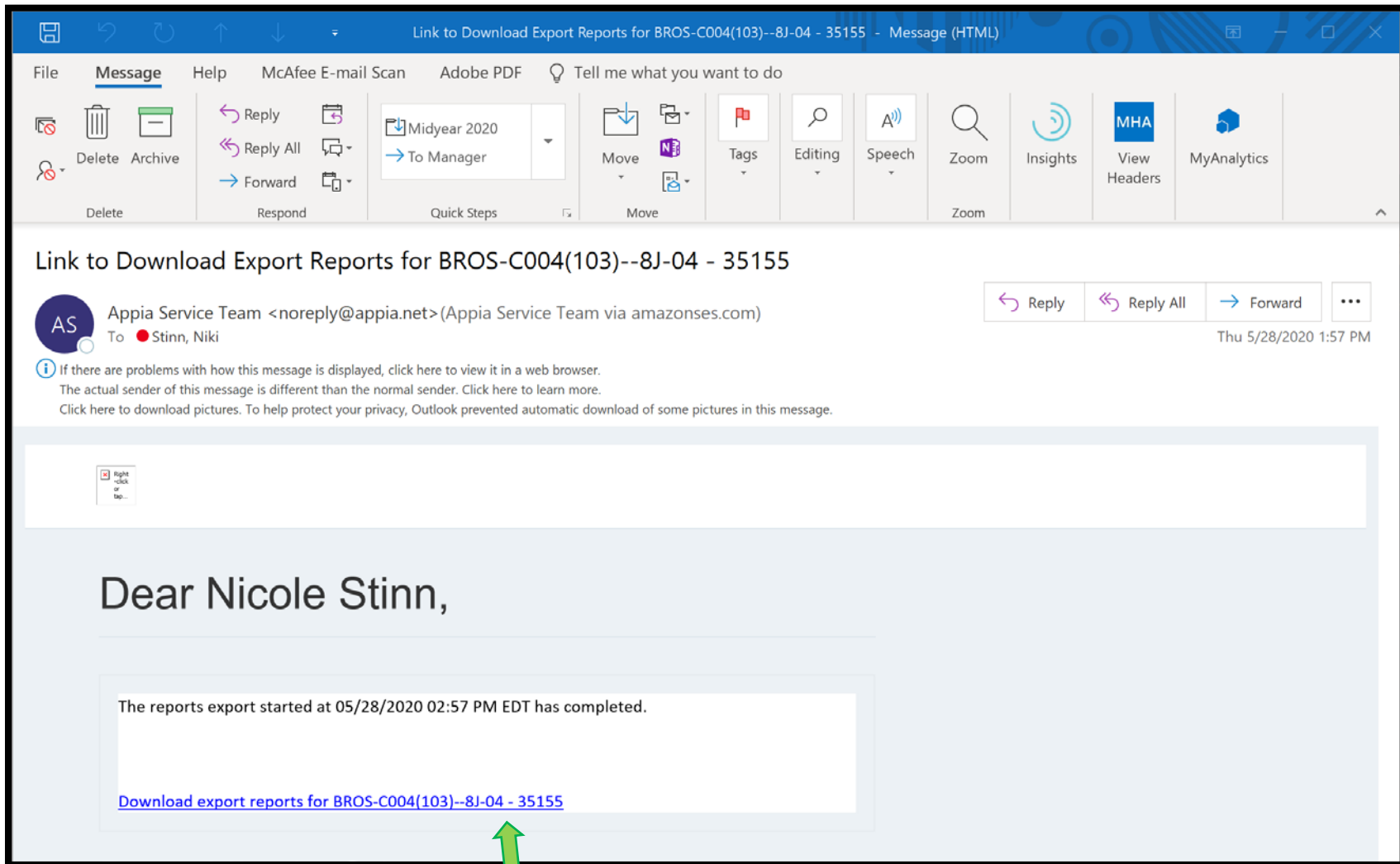
Under Construction

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

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

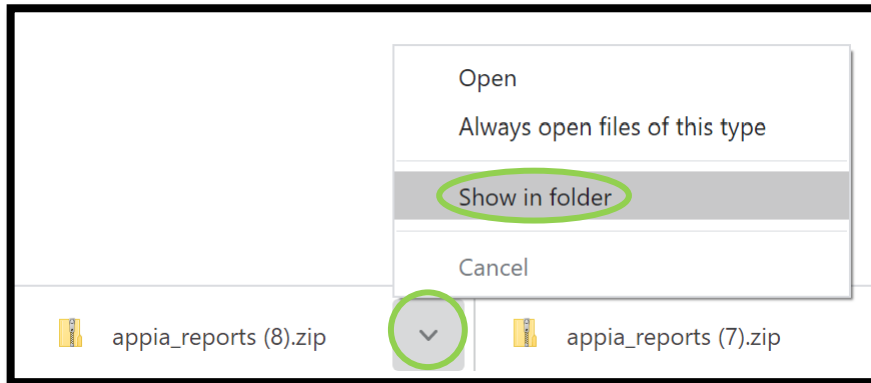
Pro tip: Projects statuses are located here. Click or tap to select a different status than the one showing. [Dismiss](#)

The email will look like this.

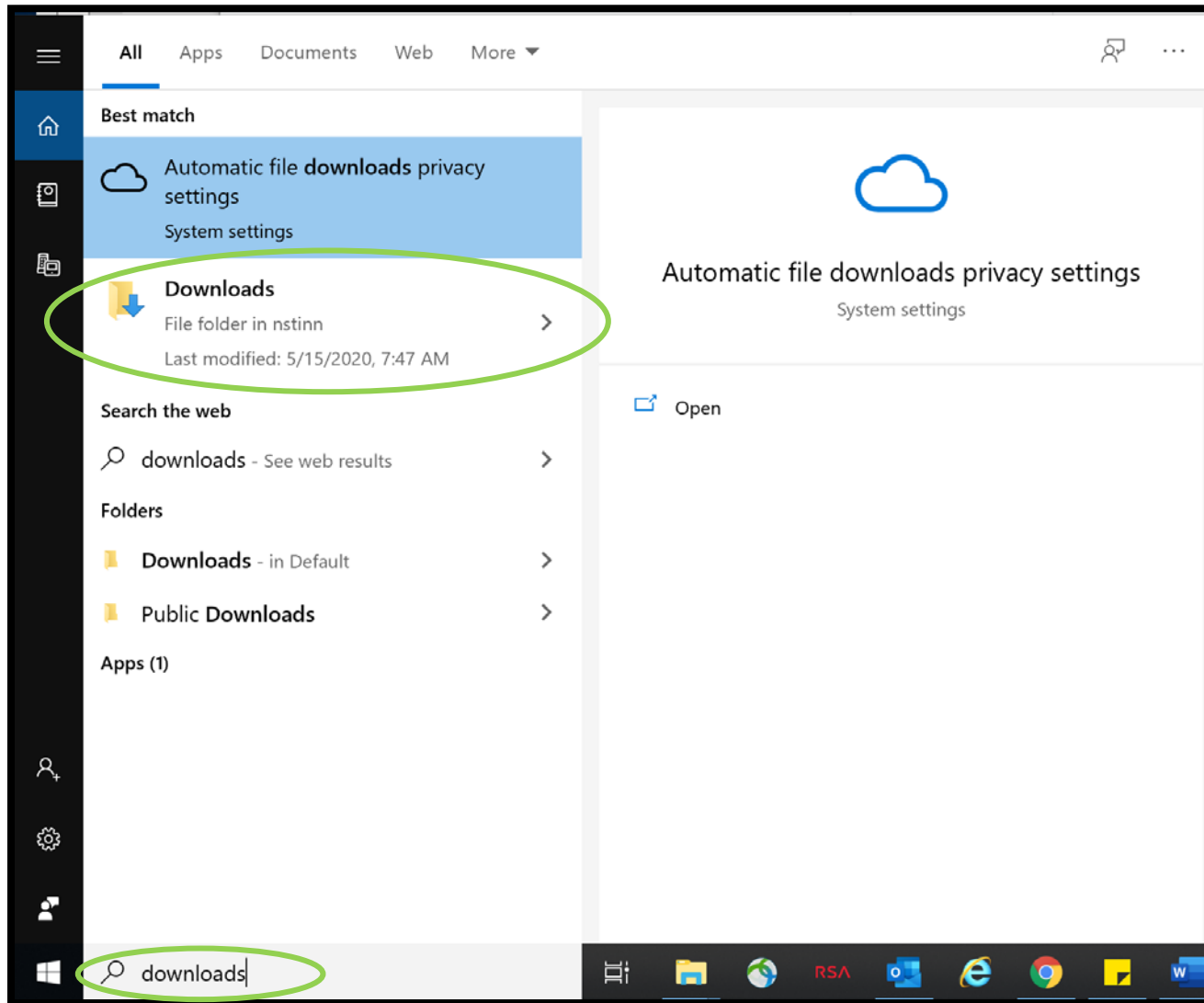


Click on the link here to download the project data.

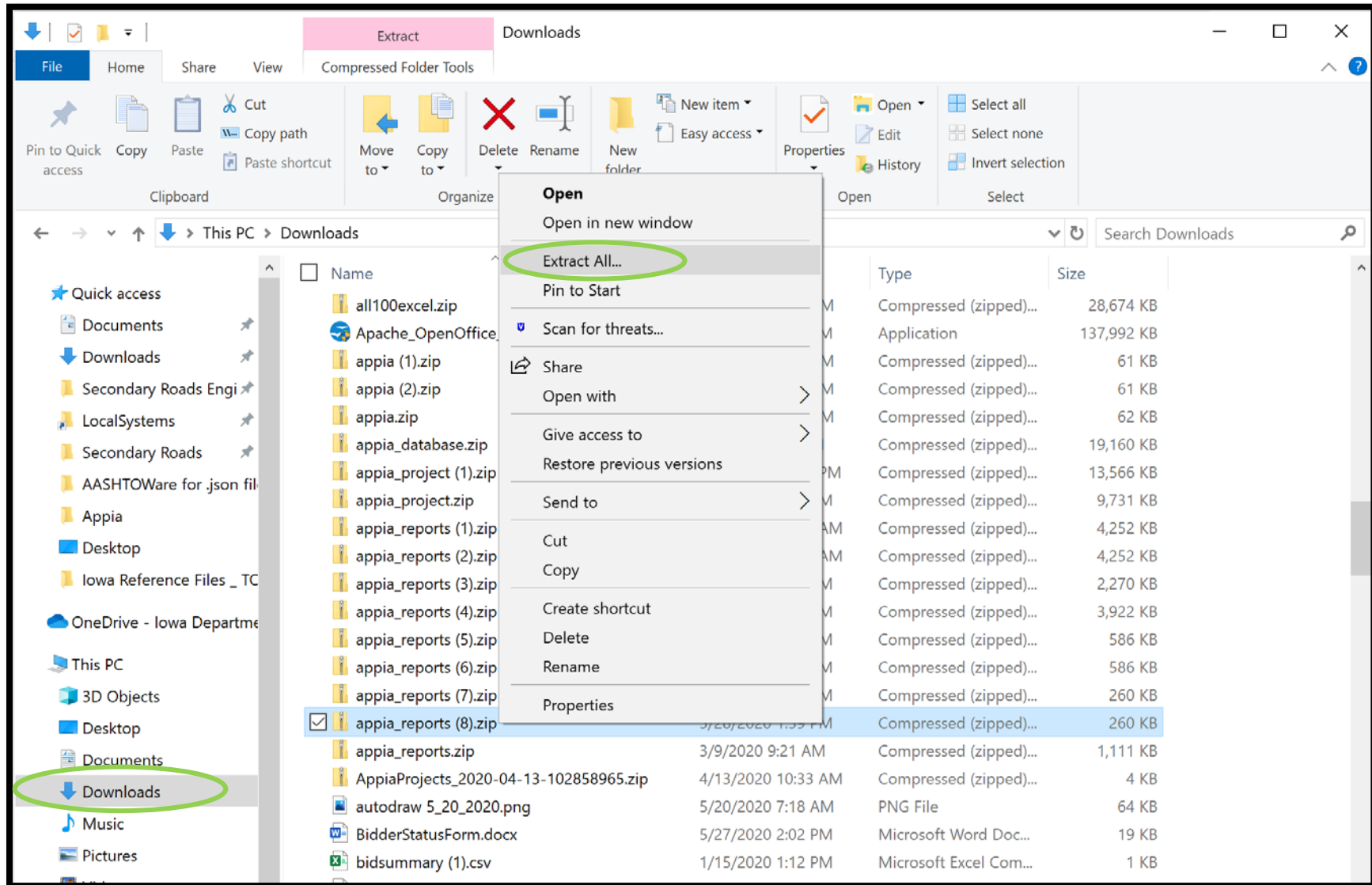
Depending on your browser, your file download may show up at the bottom like this. Click on the arrow to the right of the file name and then “Show in folder” to view the files.



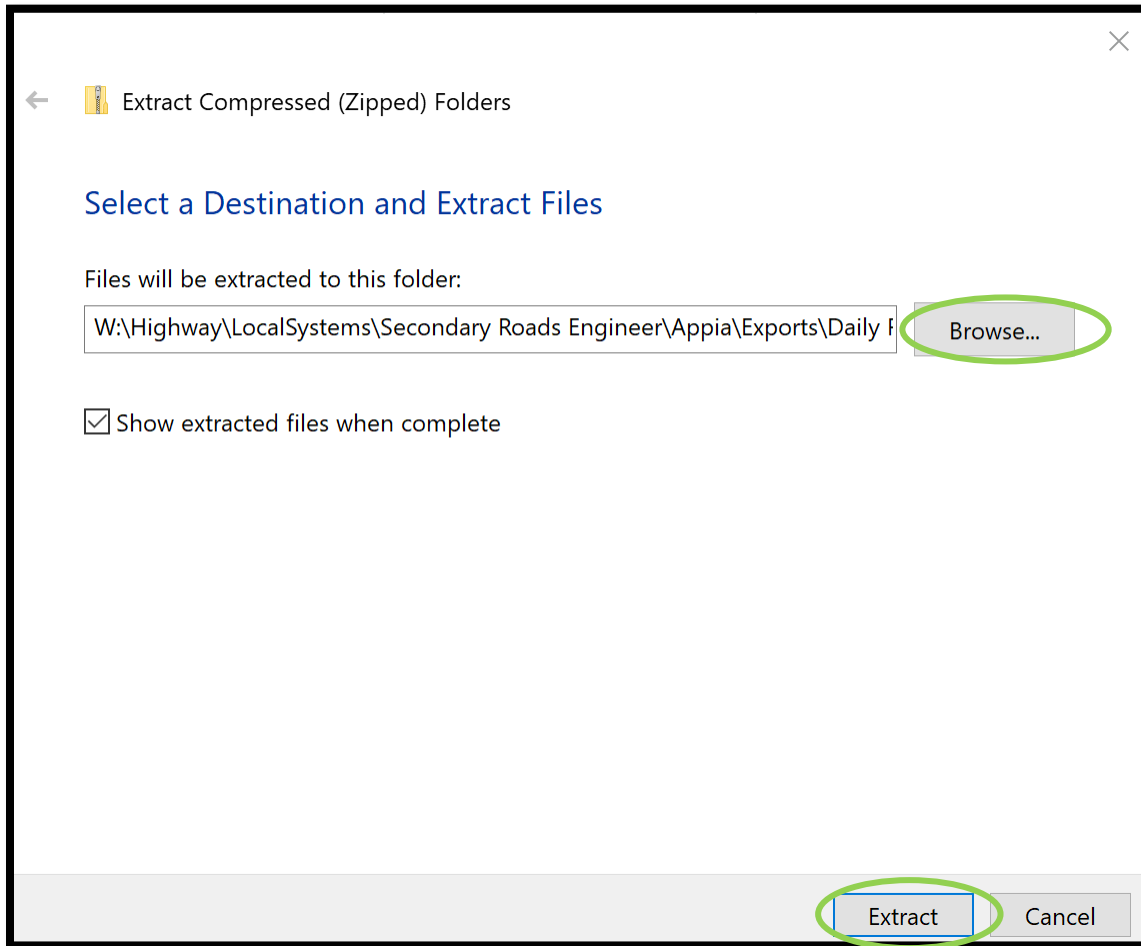
Alternately, once you have clicked on the link in the email, your zipped file can be found in the “Downloads” folder in your file explorer. The “Downloads” folder can be found by typing “downloads” in your search bar.



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



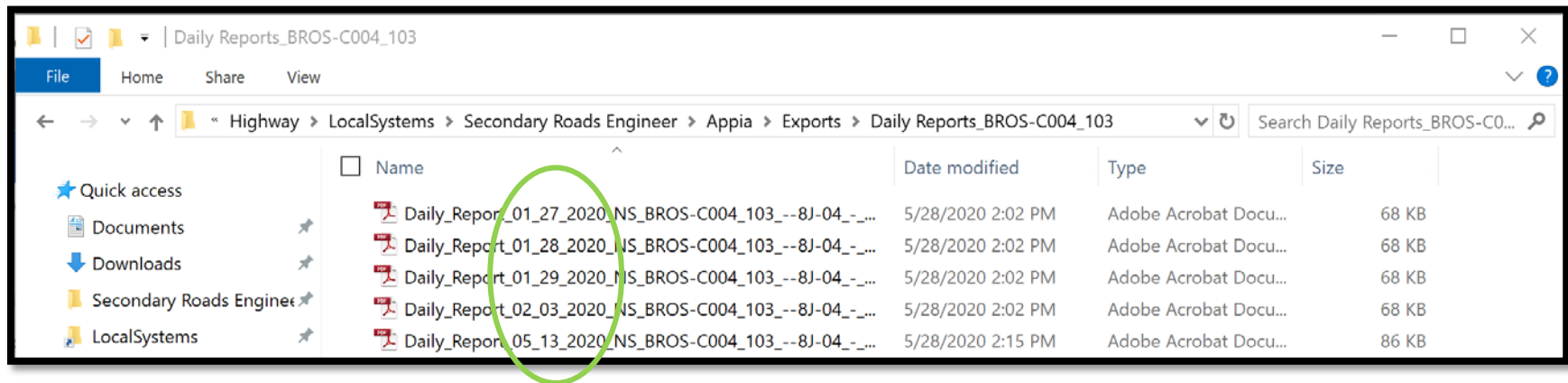
This window will pop up. Browse to find the location where you would like to save your project data.



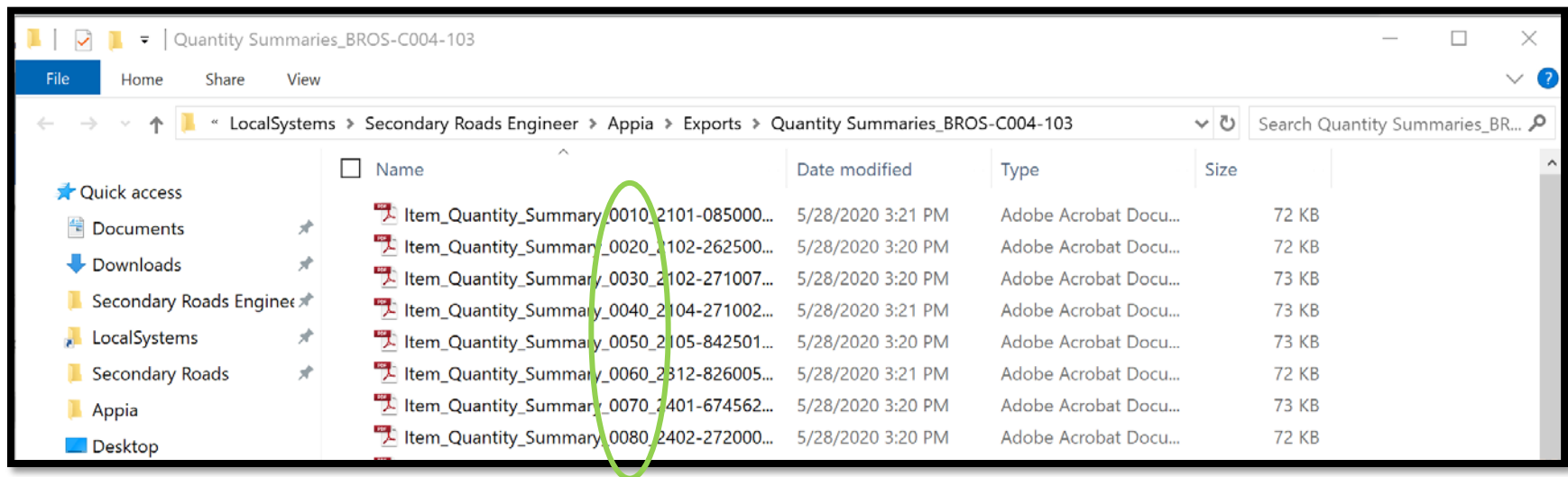
When you have selected the appropriate file in which to save your data, click "Extract".

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.



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

Description

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

Report Date

05/13/2020

Prime Contractor

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

Status

Approved

Weather

Temperature

Created By

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

Approved By

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

Remarks

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

Personnel

Crew #1 – CUNNINGHAM-REIS, LLC

Worker Type #1 (3)	10.00 hours
Worker Type #2 (1)	10.00 hours

1 crew

Equipment

Description	Active	Idle	Comments	Contractor
				CUNNINGHAM-REIS, LLC

1 equipment

Daily Report:
BROS-C004(103)--8J-04 - 35155


05/28/2020
Page 1 of 2

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

Daily Report:
BROS-C004(103)--8J-04 - 35155

05/28/2020
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.



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

Project Description
Line Number
Item
Description
Unit
Original Quantity
Authorized Quantity
Total Quantity Placed
Quantity Remaining
Pending Quantity

On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.
0030
2102-2710070
EXCAVATION, CL 10, RDWY+BORROW
CY
1,600.000
1,600.000
1,444.445
155.555
0.000

Unit Price
Quantity Paid
Quantity Placed but not Paid
Amount Paid
Amount Unpaid
Authorized Amount

\$5.00
0.000
1,444.445
\$0.00
\$7,222.23
\$8,000.00

Postings

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

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

05/28/2020
Page 1 of 1

16 - Mobile Inspector App: Connecting a User

(System Administrator access level required.)

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

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

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

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

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

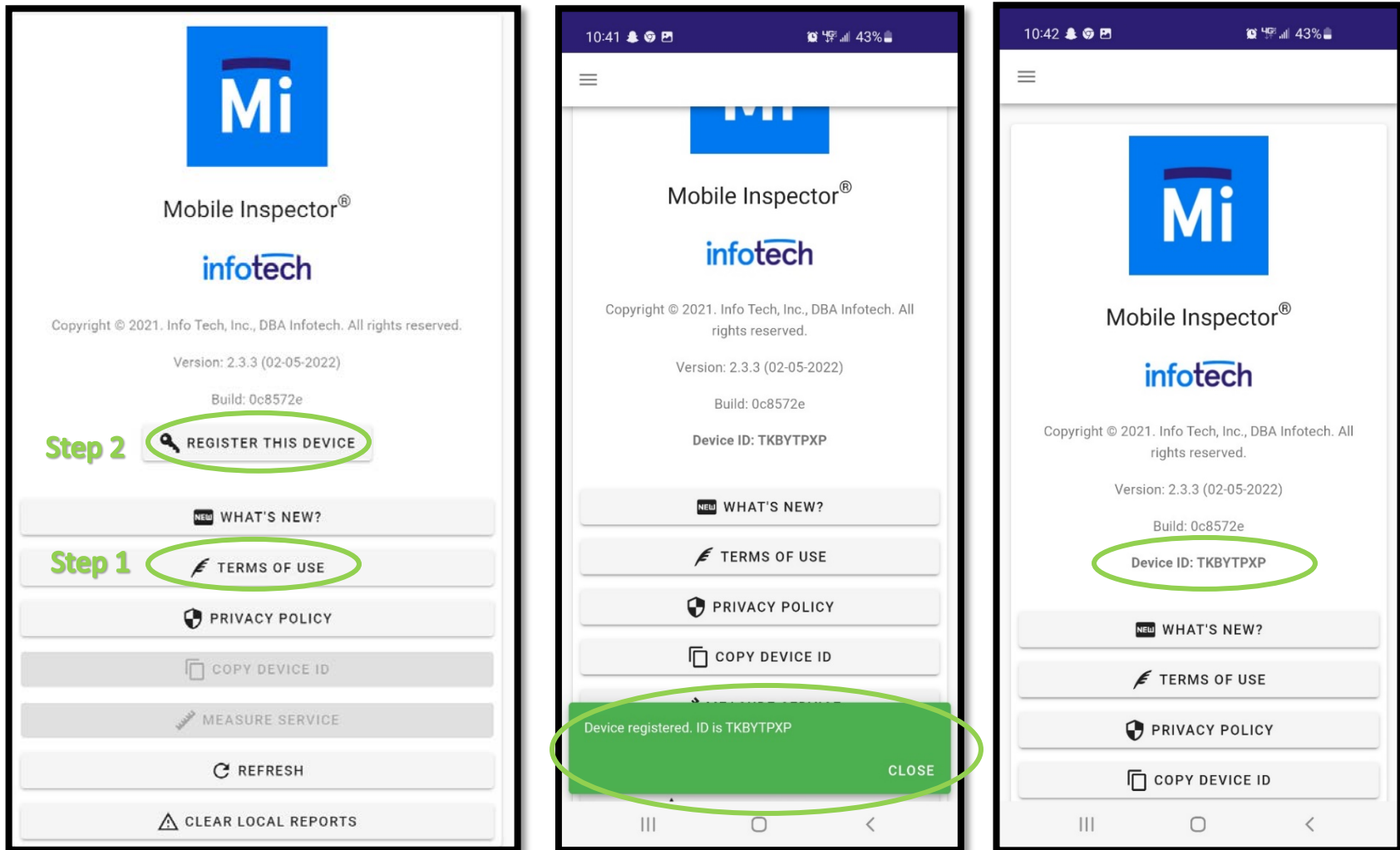
Once is application is installed, it could take up to 15 minutes for the data to sync with your account and for project information to populate.

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

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



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



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



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

Projects

My Projects

Find Project

Create Project Import Project

Status: Under Construction Advanced

Under Construction

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

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

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

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

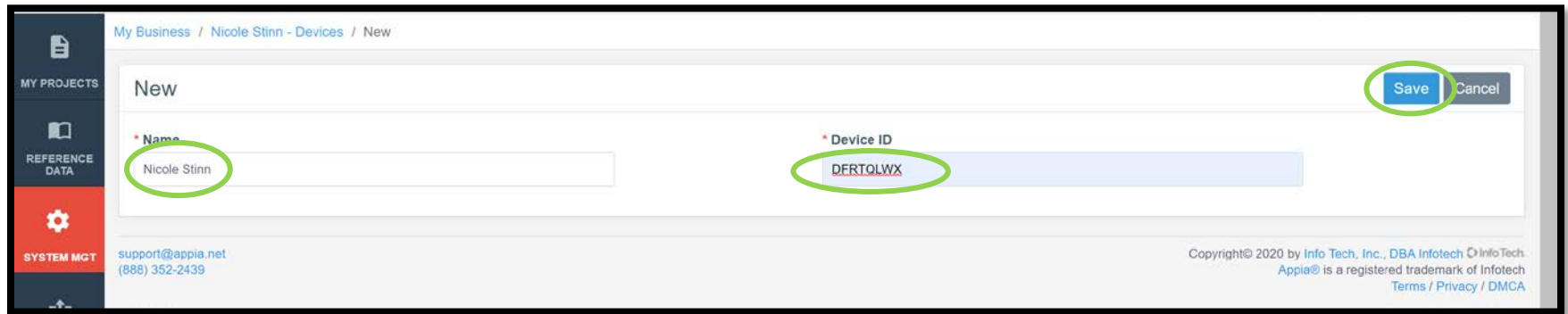
Name	Email	Default Role	Projects	Status	Devices	
JB Jennifer Basener Infotech Iowa Agency	jennifer.basener+testinstance@infotechfl.com	System Administrator	ALL	Active	Devices	✖
NS Nicole Stinn Iowa Local Systems _DEMO ACCOUNT	niki.stinn@iowadot.us	System Administrator	ALL	Active	Devices	
s# student #1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

The 'Devices' link for Nicole Stinn is circled in green.

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

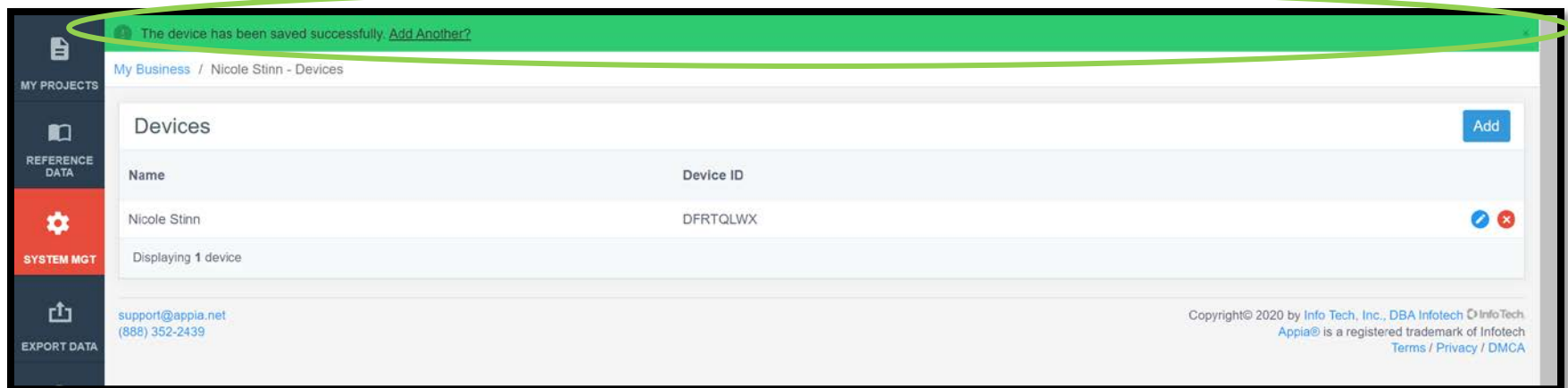
The screenshot shows the 'Devices' management page for Nicole Stinn. The left sidebar is the same as the previous screen. The main content area has a breadcrumb trail: 'My Business / Nicole Stinn - Devices'. The title is 'Devices'. A message box shows 'No devices found.' with a placeholder for a table. In the top right corner, there is a blue 'Add' button circled in green.

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



The screenshot shows the 'New' device form in the Appia web interface. The breadcrumb trail at the top reads 'My Business / Nicole Stinn - Devices / New'. On the left sidebar, the 'SYSTEM MGT' menu item is highlighted. The form contains two input fields: 'Name' with the value 'Nicole Stinn' and 'Device ID' with the value 'DFRTQLWX'. Both fields are circled in green. In the top right corner, the 'Save' button is also circled in green. The footer includes contact information for support@appia.net and a copyright notice for Info Tech, Inc., DBA Infotech.

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



The screenshot shows the 'Devices' list page in the Appia web interface. A green success message banner at the top states 'The device has been saved successfully. Add Another?'. The breadcrumb trail is 'My Business / Nicole Stinn - Devices'. The left sidebar shows 'SYSTEM MGT' highlighted. The main content area displays a table with the following data:

Name	Device ID
Nicole Stinn	DFRTQLWX

Below the table, it says 'Displaying 1 device'. An 'Add' button is in the top right corner. The footer contains the same contact and copyright information as the previous screenshot.

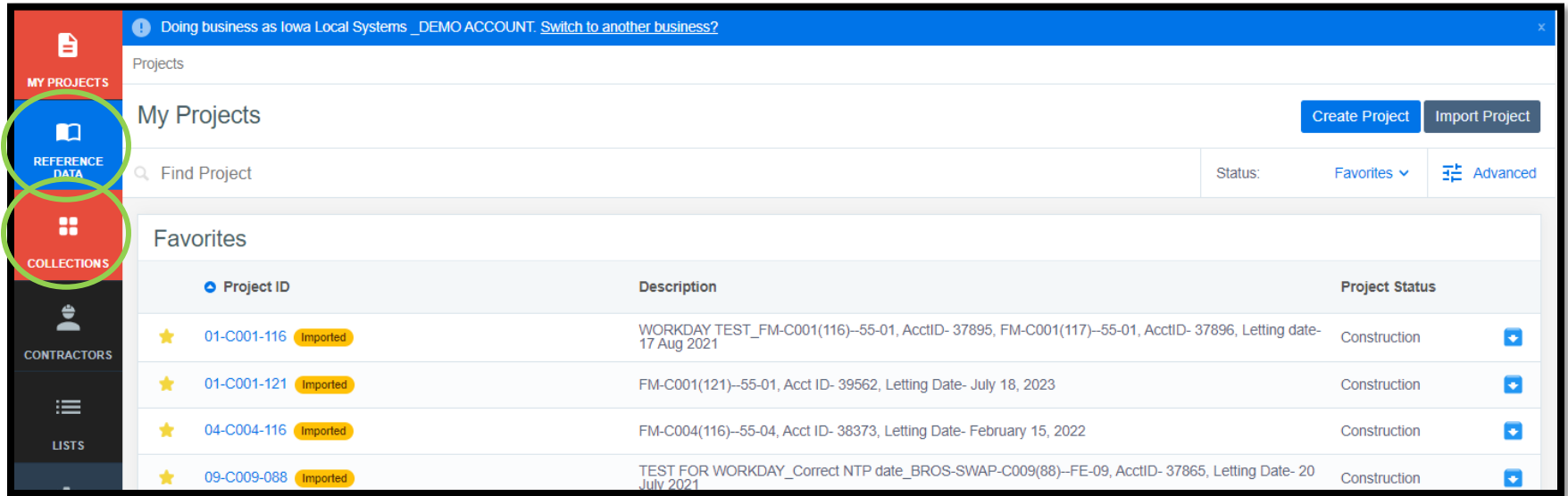
It takes about 10-15 minutes for the app on the mobile device to sync up with the Appia program.

17 - Reference Data: Bid Items & Materials

(System Administrator access level required.)

A. Adding New Bid Items

To add bid items to your agency's reference data collection, click on the "Reference Data" button in the left menu bar. Then click on "Collections" in the expanded menu.



The screenshot shows the 'My Projects' page in a web application. The left sidebar contains several menu items: 'MY PROJECTS' (red), 'REFERENCE DATA' (blue, highlighted with a green circle), 'COLLECTIONS' (red, highlighted with a green circle), 'CONTRACTORS' (black), and 'LISTS' (black). The main content area is titled 'My Projects' and includes a search bar, a 'Find Project' button, and a 'Status' dropdown menu. Below this is a table of 'Favorites' projects.

Project ID	Description	Project Status
★ 01-C001-116 Imported	WORKDAY TEST_FM-C001(116)--55-01, AcctID- 37895, FM-C001(117)--55-01, AcctID- 37896, Letting date- 17 Aug 2021	Construction
★ 01-C001-121 Imported	FM-C001(121)--55-01, Acct ID- 39562, Letting Date- July 18, 2023	Construction
★ 04-C004-116 Imported	FM-C004(116)--55-04, Acct ID- 38373, Letting Date- February 15, 2022	Construction
★ 09-C009-088 Imported	TEST FOR WORKDAY_Correct NTP date_BROS-SWAP-C009(88)--FE-09, AcctID- 37865, Letting Date- 20 July 2021	Construction

Next, click on the blue text for the desired Reference Data Collection. Each agency will have their own reference data collection(s) under the “XXXX County/City – Iowa Collections” section. Additionally, the Iowa DOT’s reference data collection(s) will be listed under the Shared Collections section (along with any other public collections). Shared collections are only editable by the creating agency, so Iowa LPA’s will not be able to edit the Iowa DOT collection; however, LPAs can edit their own collection. To edit your agency’s collection, click on the blue collection name.

Harrison County - Iowa Collections		
Collection Name		Last Updated
Harrison County - Iowa reference		October 1, 2024 ***
Shared Collections		
Collection Name	Shared By	Last Updated
Iowa DOT Reference Data Collection (Current)	Iowa Local Systems _DEMO ACCOUNT	December 30, 2024

Five tabs will display near the top and middle of the page: Items, Materials, Item Materials, Worksheets, and Shared. Click on the Items tab if it is not already selected.

<div>MY PROJECTS</div> <div>COLLECTIONS</div> <div>CONTRACTORS</div> <div>LISTS</div>	Reference Collections / Iowa Local Systems _DEMO ACCOUNT Reference Collection				
	Iowa Local Systems _DEMO ACCOUNT Reference Collection				
	Last updated: 09/30/2024				
	<div>ITEMS</div> <div>MATERIALS</div> <div>ITEM MATERIALS</div> <div>WORKSHEETS</div>				
	<div>Items</div> <div> <div>Add</div> <div>Import</div> <div>Export</div> </div> <div> <div>Search for Item ID, Description, Unit, Fuel Factor or Asphalt Factor</div> <div>Search</div> </div>				
	Item ID	Description	Unit	Fuel Factor	Asphalt Factor
	201-01	CLEARING AND GRUBBING	\$1,500.00	0.0000	0.0000

Option 1: Manual addition of bid items

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

The screenshot displays the 'Iowa Local Systems _DEMO ACCOUNT Reference Collection' interface. The left sidebar contains navigation options: 'MY PROJECTS', 'COLLECTIONS' (highlighted in red), 'CONTRACTORS', and 'LISTS'. The main header shows the collection name and its last update date: 'Last updated: 09/30/2024'. Below the header, there are tabs for 'ITEMS', 'MATERIALS', 'ITEM MATERIALS', and 'WORKSHEETS'. The 'ITEMS' tab is selected, and the 'Add' button is circled in green. Below the tabs, there is a search bar with the placeholder text 'Search for Item ID, Description, Unit, Fuel Factor or Asphalt Factor' and a 'Search' button. The main content area displays a table with the following columns: 'Item ID', 'Description', 'Unit', 'Fuel Factor', and 'Asphalt Factor'. The table contains one row with the following data: '201-01', 'CLEARING AND GRUBBING', '\$1,500.00', '0.0000', and '0.0000'. A red 'x' icon is visible in the bottom right corner of the table.

Item ID	Description	Unit	Fuel Factor	Asphalt Factor
201-01	CLEARING AND GRUBBING	\$1,500.00	0.0000	0.0000

Fill out the following 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 specification code. Example: 2528-251800. The Description is the item’s title and needs to match the name of the item in the import file exactly. 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.

(See next page for screenshot)

MY PROJECTS

COLLECTIONS

CONTRACTORS

LISTS

Reference Collections / Iowa Local Systems _DEMO ACCOUNT Reference Collection / New

Iowa Local Systems _DEMO ACCOUNT Reference Collection

Last updated: 09/30/2024

ITEMSMATERIALSITEM MATERIALSWORKSHEETS

New

* Item ID

2303-1264347

* Description

ASPH BINDER, PG 64-34E+

Asphalt Factor

0.0000

Worksheet

** None Selected **

* Unit

Options

☒ Include Supplemental Description?

☐ Lump Sum?

Fuel Factor

0.0000

Save

Cancel

Option 2: Importing bid items

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

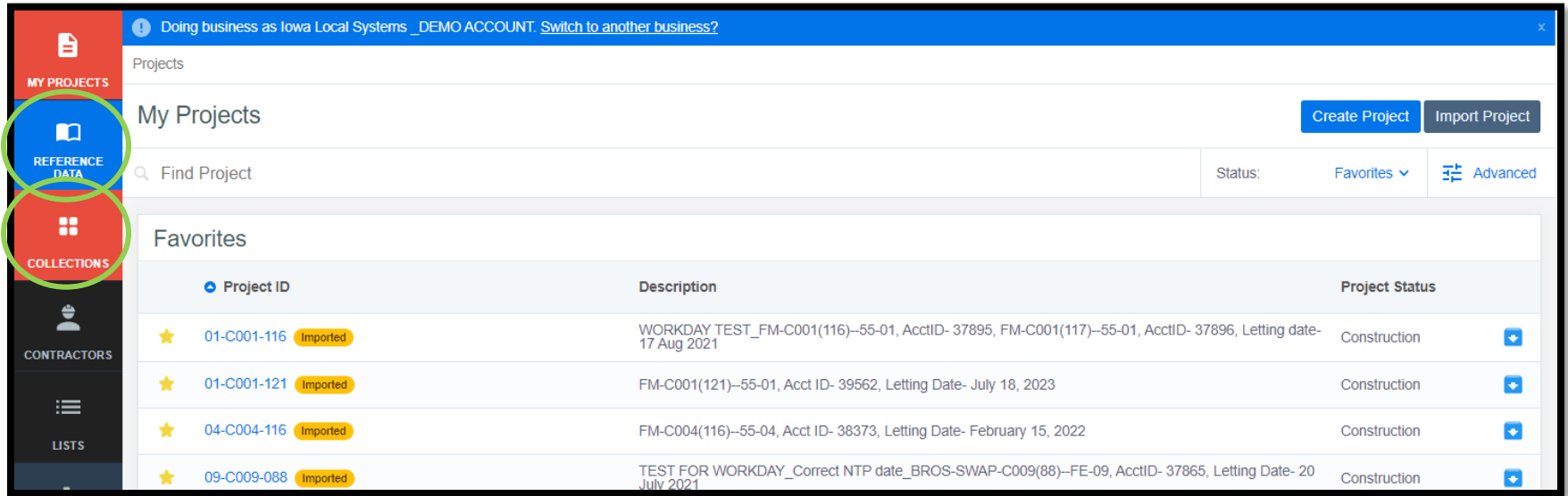
The screenshot shows the 'Items' page of the 'Iowa Local Systems _DEMO ACCOUNT Reference Collection'. The page has a sidebar with 'MY PROJECTS', 'COLLECTIONS', 'CONTRACTORS', and 'LISTS'. The main content area has tabs for 'ITEMS', 'MATERIALS', 'ITEM MATERIALS', and 'WORKSHEETS'. The 'ITEMS' tab is active. At the top right of the 'Items' section, there are three buttons: 'Add', 'Import', and 'Export'. The 'Import' button is circled in green. Below the buttons is a search bar with the placeholder text 'Search for Item ID, Description, Unit, Fuel Factor or Asphalt Factor'. Below the search bar is a table with the following columns: 'Item ID', 'Description', 'Unit', 'Fuel Factor', and 'Asphalt Factor'. The table contains one row with the following data: '201-01', 'CLEARING AND GRUBBING', '\$1,500.00', '0.0000', and '0.0000'. There is a red 'x' icon in the bottom right corner of the table.

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

The screenshot shows the 'Import Items' dialog box. At the top, there is a blue banner with a warning icon and the text 'Doing business as Iowa Local Systems _DEMO ACCOUNT. Switch to another business?'. Below the banner is the breadcrumb 'Reference Collections / Iowa Local Systems _DEMO ACCOUNT Reference Collection / Import'. The main content area has tabs for 'ITEMS', 'MATERIALS', 'ITEM MATERIALS', and 'WORKSHEETS'. The 'ITEMS' tab is active. The dialog box has a title 'Import Items' and a 'Cancel' button. Below the title, there is a text input field with the placeholder text 'Choose a CSV or Excel file to import.'. Below the text input field, there is a 'Choose File' button and a file name 'English Items Final.csv'. Below the 'Choose File' button, there is an 'Upload File' button. Both the 'Choose File' button and the 'Upload File' button are circled in green.

B. Adding New Materials

To add materials to your agency's reference data collection, click on the "Reference Data" button in the left menu bar. Then click on "Collections" in the expanded menu.



The screenshot shows the 'My Projects' page in a web application. The left sidebar contains several menu items: 'MY PROJECTS' (top), 'REFERENCE DATA' (highlighted with a green circle), 'COLLECTIONS' (highlighted with a green circle), 'CONTRACTORS', and 'LISTS'. The main content area is titled 'My Projects' and includes a search bar labeled 'Find Project', a 'Status' filter, and a 'Favorites' dropdown. Below this is a table of project favorites.

Project ID	Description	Project Status
★ 01-C001-116 Imported	WORKDAY TEST_FM-C001(116)--55-01, AcctID- 37895, FM-C001(117)--55-01, AcctID- 37896, Letting date- 17 Aug 2021	Construction
★ 01-C001-121 Imported	FM-C001(121)--55-01, Acct ID- 39562, Letting Date- July 18, 2023	Construction
★ 04-C004-116 Imported	FM-C004(116)--55-04, Acct ID- 38373, Letting Date- February 15, 2022	Construction
★ 09-C009-088 Imported	TEST FOR WORKDAY_Correct NTP date_BROS-SWAP-C009(88)--FE-09, AcctID- 37865, Letting Date- 20 July 2021	Construction

Next, click on the blue text for the desired Reference Data Collection. Each agency will have their own reference data collection(s) under the “XXXX County/City – Iowa Collections” section. Additionally, the Iowa DOT’s reference data collection(s) will be listed under the Shared Collections section (along with any other public collections). Shared collections are only editable by the creating agency, so Iowa LPA’s will not be able to edit (add/delete items) the Iowa DOT collection; however, LPAs can edit their own collection. To edit your agency’s collection, click on the blue collection name.

Harrison County - Iowa Collections		
Collection Name		Last Updated
Harrison County - Iowa reference		October 1, 2024 ***
Shared Collections		
Collection Name	Shared By	Last Updated
Iowa DOT Reference Data Collection (Current)	Iowa Local Systems _DEMO ACCOUNT	December 30, 2024

Five tabs will display near the top and middle of the page: Items, Materials, Item Materials, Worksheets, and Shared. Click on the Materials tab.

Reference Collections / Iowa Local Systems _DEMO ACCOUNT reference			
Iowa Local Systems _DEMO ACCOUNT reference			Manage Collection ▾
Last updated: 11/20/2024			
ITEMS	MATERIALS	ITEM MATERIALS	WORKSHEETS SHARED
Materials			
			Add Import Export
<input type="text"/> Search for Description, Unit, Material ID or Requirements			
Search			
Description	Unit	Material ID	Requirements
ABS ELBOWS, NON-PERFORATED	LF	4624S00015	✕
ABS ELBOWS, PERFORATED	LF	4624P00015	✕

Option 1: Manual addition of materials

To add materials manually, click on the “Add” button near the top, right corner.

Reference Collections / Iowa Local Systems _DEMO ACCOUNT reference

Iowa Local Systems _DEMO ACCOUNT reference

Last updated: 11/20/2024

Manage Collection ▾

ITEMS

MATERIALS

ITEM MATERIALS

WORKSHEETS

SHARED

Materials

Add

Import

Export

Search for Description, Unit, Material ID or Requirements

Search

Description	Unit	Material ID	Requirements
ABS ELBOWS, NON-PERFORATED	LF	4624S00015	✕
ABS ELBOWS, PERFORATED	LF	4624P00015	✕

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

“Material ID” - If creating a bid item as a material, enter the bid item’s ID (the four digit-seven digit specification number). If creating a material for payrolls, use 0000-0000001. If creating a material for liquidated damages, use 0000-0000002. (See the Limiting Payment on Items for Certifications, Payroll, and Anticipated Liquidated Damages section of the [Appia “Under Construction” Instructions](#) for more information on the use of these particular “materials”.) If creating a true material associated with a bid item (i.e. fly ash for a PCC bid item), use a “Material ID” of your choosing.

“Description” - If creating a bid item as a material, enter the bid item’s ID and description as it appears on the contract and in the Items section of the Reference Data. If creating a material for payrolls, use “0000-0000001 PAYROLL”. If creating a material for liquidated damages, use “0000-0000002 LIQUIDATED DAMAGES”. (See the Limiting Payment on Items for Certifications, Payroll, and Anticipated Liquidated Damages section of the [Appia “Under Construction” Instructions](#) for more information on the use of these particular “materials”.) If creating a true material associated with a bid item (i.e. fly ash for a PCC bid item), use a “Description” that conveys the name of the material.

“Unit” - If creating a bid item as a material, enter the bid item’s unit as it appears on the contract and in the Items section of the Reference Data. If creating a material for payrolls, use “None”. If creating a material for liquidated damages, use “None”. (See the Limiting Payment on Items for Certifications, Payroll, and Anticipated Liquidated Damages section of the [Appia “Under Construction” Instructions](#) for more information on the use of these particular “materials”.) If creating a true material associated with a bid item (i.e. fly ash for a PCC bid item), use a “Unit” that matches the units by which the material is measured.

“Requirements” – This field can be left blank.

“Item” and “Usage Rate” – Leave these fields as-is.

(See screenshot on next page.)

Iowa DOT Reference Data Collection (Current)

Public Last updated: 12/30/2024

Manage Collection ▾

ITEMS

MATERIALS

ITEM MATERIALS

WORKSHEETS

AUDIT LOG

Edit

Save

Cancel

Material ID

2213-8202060

* Unit

SY

* Description

2213-8202060 BASE WIDENING, 6 IN. PORTLAND CEMENT CONCRETE

Requirements

* Item

2213-8202060

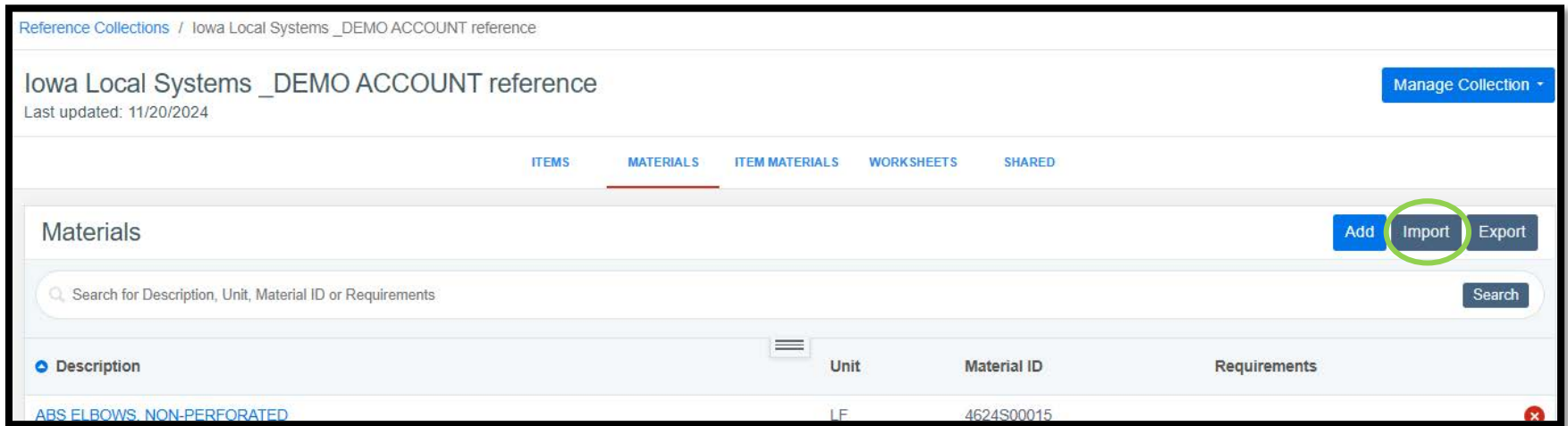
Usage Rate

0.000

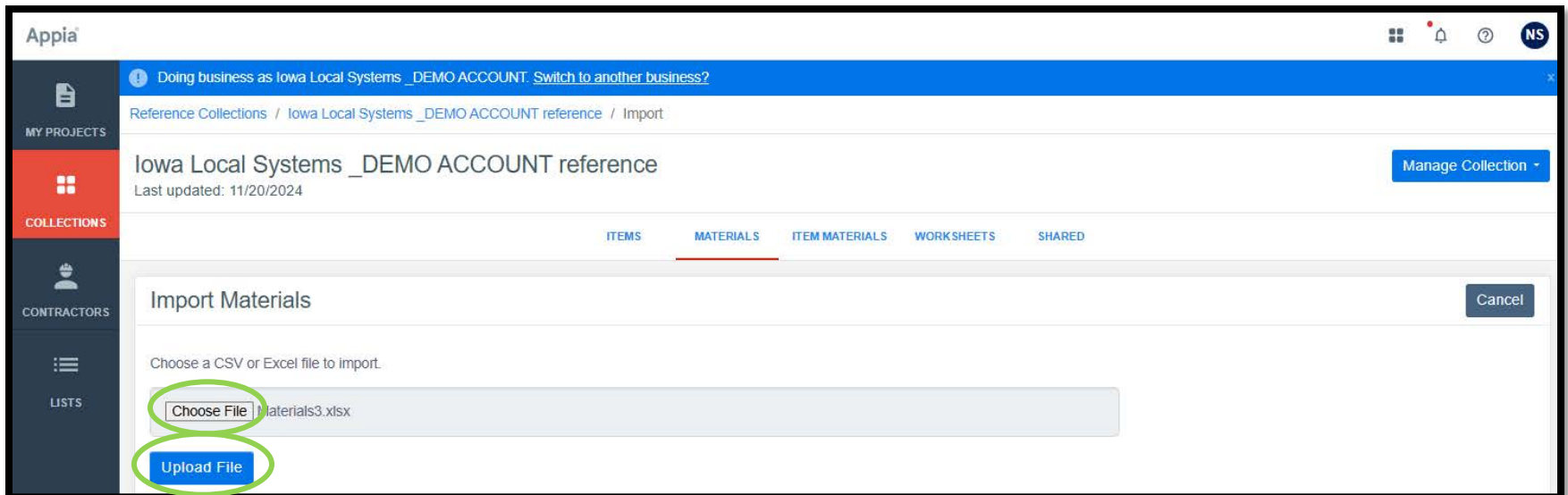


Option 2: Importing materials

To import a bid item list from a .csv file, click on the “Materials” tab and then 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”.



C. Associating Materials to Bid Items

Materials must be associated to bid items in order for them to affect payable bid item quantities. To associate a material to a bid item in your agency's reference data collection, click on the "Reference Data" button in the left menu bar. Then click on "Collections" in the expanded menu.

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

Projects

My Projects

Create Project Import Project

Find Project Status: Favorites Advanced

Favorites

Project ID	Description	Project Status
★ 01-C001-116 Imported	WORKDAY TEST_FM-C001(116)--55-01, AcctID- 37895, FM-C001(117)--55-01, AcctID- 37896, Letting date- 17 Aug 2021	Construction
★ 01-C001-121 Imported	FM-C001(121)--55-01, Acct ID- 39562, Letting Date- July 18, 2023	Construction
★ 04-C004-116 Imported	FM-C004(116)--55-04, Acct ID- 38373, Letting Date- February 15, 2022	Construction
★ 09-C009-088 Imported	TEST FOR WORKDAY_Correct NTP date_BROS-SWAP-C009(88)--FE-09, AcctID- 37865, Letting Date- 20 July 2021	Construction

Next, click on the blue text for the desired Reference Data Collection. Each agency will have their own reference data collection(s) under the “XXXX County/City – Iowa Collections” section. Additionally, the Iowa DOT’s reference data collection(s) will be listed under the Shared Collections section (along with any other public collections). Shared collections are only editable by the creating agency, so Iowa LPA’s will not be able to edit (add/delete items) the Iowa DOT collection; however, LPAs can edit their own collection. To edit your agency’s collection, click on the blue collection name.

Harrison County - Iowa Collections		
Collection Name	Last Updated	
Harrison County - Iowa reference	October 1, 2024	...
Shared Collections		
Collection Name	Shared By	Last Updated
Iowa DOT Reference Data Collection (Current)	Iowa Local Systems _DEMO ACCOUNT	December 30, 2024

Five tabs will display near the top and middle of the page: Items, Materials, Item Materials, Worksheets, and Shared. Click on the Item Materials tab.

Reference Collections / Iowa Local Systems _DEMO ACCOUNT reference

Iowa Local Systems _DEMO ACCOUNT reference

Last updated: 11/20/2024

Manage Collection

ITEMS MATERIALS **ITEM MATERIALS** WORKSHEETS SHARED

Item Materials

Add Material

Search for Item ID, Description or Unit

Search

<input type="checkbox"/>	Item ID	Description	Unit	Materials
<input type="checkbox"/>	2121-7425022	GRANULAR SHLD, TYPE B, PLACE ONLY	TON	0
<input type="checkbox"/>	2121-8450810	TRENCH+RESHAPING	STA	0
<input type="checkbox"/>	2121-8500000	TACK COAT BITUMEN (FOR PAVED SHOULDER AGGREGATE FILLET)	GAL	1
<input type="checkbox"/>	2122-5190006	PAVED SHLD, PCC, 6"	SY	0
<input type="checkbox"/>	2122-5190007	PAVED SHOULDER, P.C. CONCRETE, 7 IN.	SY	11
<input type="checkbox"/>	2122-5190008	PAVED SHOULDER, P.C. CONCRETE, 8 IN.	SY	11

A list of the bid items will display. A column on the far right called “Materials” will show the number of Materials associated with each listed bid item. To add a Material to a bid item, click on the check box on the left side of the line associated with the targeted bid item.

Reference Collections / Iowa Local Systems _DEMO ACCOUNT reference

Iowa Local Systems _DEMO ACCOUNT reference

Last updated: 11/20/2024

Manage Collection

ITEMS MATERIALS ITEM MATERIALS WORKSHEETS SHARED

Item Materials

Add Material

Search for Item ID, Description or Unit

Search

<input type="checkbox"/>	Item ID	Description	Unit	Materials
<input type="checkbox"/>	2121-7425022	GRANULAR SHLD, TYPE B, PLACE ONLY	TON	0
<input type="checkbox"/>	2121-8450810	TRENCH+RESHAPING	STA	0
<input type="checkbox"/>	2121-8500000	TACK COAT BITUMEN (FOR PAVED SHOULDER AGGREGATE FILLET)	GAL	1
<input type="checkbox"/>	2122-5190006	PAVED SHLD, PCC, 6"	SY	0
<input type="checkbox"/>	2122-5190007	PAVED SHOULDER, P.C. CONCRETE, 7 IN.	SY	11
<input type="checkbox"/>	2122-5190008	PAVED SHOULDER, P.C. CONCRETE, 8 IN.	SY	11

Once the box has been checked, the “Add Material” button near the upper, right corner will turn blue. Click on it.

Reference Collections / Iowa Local Systems _DEMO ACCOUNT reference

Iowa Local Systems _DEMO ACCOUNT reference

Last updated: 11/20/2024

Manage Collection ▾

ITEMS MATERIALS ITEM MATERIALS WORKSHEETS SHARED

Item Materials

Search for Item ID, Description or Unit

<input type="checkbox"/>	Item ID	Description	Unit	Materials
<input type="checkbox"/>	2121-7425022	GRANULAR SHLD, TYPE B, PLACE ONLY	TON	0
<input type="checkbox"/>	2121-8450810	TRENCH+RESHAPING	STA	0
<input type="checkbox"/>	2121-8500000	TACK COAT BITUMEN (FOR PAVED SHOULDER AGGREGATE FILLET)	GAL	1
<input checked="" type="checkbox"/>	2122-5190006	PAVED SHLD, PCC, 6"	SY	0
<input type="checkbox"/>	2122-5190007	PAVED SHOULDER, P.C. CONCRETE, 7 IN.	SY	11

A window will pop up showing a list of the Materials available to be associated with the selected bid item.

Add Material to Item(s)

2122-5190006 - PAVED SHOULDER, P.C. CONC...

Search for Description, Unit or Material ID

Search

Description	Unit	Material ID
0000-0000001 PAYROLL	None	0000-0000001
0000-0000002 LIQUIDATED DAMAGES	None	0000-0000002
2101-0850001 CLEARING AND GRUBBING	ACRE	2101-0850001
2101-0850002 CLEARING AND GRUBBING	UNIT	2101-0850002
2101-1001005 REMOVAL OF FLOOD DEBRIS	TON	2101-1001005

12345...Next >Last »

Displaying materials 1 - 5 of 3705 in total

Usage rate0.000

Add Material

Cancel

Click on the line containing the desired Material. Use the search bar or page navigation buttons at the bottom of the list to assist in finding the Material if it is not immediately visible. Once the line is clicked, a green circle with a check mark will appear on the right end of the Materials' line, and the Material's name will be listed on the Usage rate line at the bottom of the window. Leave the Usage rate at 0.000, and click the blue "Add Material" button in the bottom, right corner of the window.

Add Material to Item(s)

2122-5190006 - PAVED SHOULDER, P.C. CONC...

Search for Description, Unit or Material ID

Search

Description	Unit	Material ID	
0000-0000001 PAYROLL	None	0000-0000001	✓
0000-0000002 LIQUIDATED DAMAGES	None	0000-0000002	
2101-0850001 CLEARING AND GRUBBING	ACRE	2101-0850001	
2101-0850002 CLEARING AND GRUBBING	UNIT	2101-0850002	
2101-1001005 REMOVAL OF FLOOD DEBRIS	TON	2101-1001005	

12345...Next>Last»

Displaying materials 1 - 5 of 3705 in total

Usage rate0.000

for 0000-0000001 PAYROLL

Add Material

Cancel

You will be directed back to the Item Materials tab. A green ribbon should appear saying, “The item material association has been saved successfully.”

Item Materials					Add Material
The item material association has been saved successfully.					
2122					Search
<input type="checkbox"/>	Item ID	Description		Unit	Materials
<input type="checkbox"/>	2122-5190006	PAVED SHOULDER, P.C. CONCRETE, 6 IN.		SY	3
<input type="checkbox"/>	2122-5190007	PAVED SHOULDER, P.C. CONCRETE, 7 IN.		SY	3
<input type="checkbox"/>	2122-5190008	PAVED SHOULDER, P.C. CONCRETE, 8 IN.		SY	3

D. Removing “Lump Sum” Designations (For Projects Imported Prior to Iowa DOT’s Reference Data Collection)

**This section is not applicable to projects imported using Iowa DOT’s Reference Data Collection, which was implemented in January of 2025. The Iowa DOT Reference Data Collection does not contain any “lump sum” designations for bid items.

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 projects. 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.

The screenshot displays the Iowa DOT Reference Data Collection interface. The left sidebar contains navigation links: MY PROJECTS, COLLECTIONS (highlighted in red), CONTRACTORS, and LISTS. The main content area shows the 'Iowa Local Systems _DEMO ACCOUNT Reference Collection' with a breadcrumb trail: Reference Collections / Iowa Local Systems _DEMO ACCOUNT Reference Collection / 2528-8445110. Below the breadcrumb, the collection name and last update date (09/30/2024) are shown. A tabbed interface at the top of the main area includes ITEMS (selected), MATERIALS, ITEM MATERIALS, and WORKSHEETS. The main content area displays a table with the following data:

2528-8445110		Edit
Description	TRAFFIC CONTROL	Lump Sum? Yes
Unit	LS	Asphalt Factor 0.0000

The 'Lump Sum?' dropdown menu is circled in green, indicating the current selection is 'Yes'.

CONTRACTORS
LISTS

Edit

Save Cancel

* Item ID

2528-8445110

* Description

TRAFFIC CONTROL

Asphalt Factor

0.0000

Worksheet

** None Selected **

* Unit

LS

Options

☐ Include Supplemental Description?
☒ Lump Sum?

Fuel Factor

0.0000

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

MY PROJECTS

REFERENCE DATA

COLLECTIONS

CONTRACTORS

LISTS

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

Projects

My Projects

Find Project

Status:

Favorites

Advanced

Project ID

Description

Project Status

01-C001-116 Imported

WORKDAY TEST_FM-C001(116)–55-01, AcctID- 37895, FM-C001(117)–55-01, AcctID- 37896, Letting date- 17 Aug 2021

Construction

01-C001-121 Imported

FM-C001(121)–55-01, Acct ID- 39562, Letting Date- July 18, 2023

Construction

04-C004-116 Imported

FM-C004(116)–55-04, Acct ID- 38373, Letting Date- February 15, 2022

Construction

09-C009-088 Imported

TEST FOR WORKDAY_Correct NTP date_BROS-SWAP-C009(88)–FE-09, AcctID- 37865, Letting Date- 20 July 2021

Construction

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Next, click on the blue text for the desired Reference Data Collection. For Iowa DOT-administered projects, the collection with “Iowa reference” in the name is the applicable collection.

The screenshot shows a web application interface. On the left is a dark blue sidebar with navigation links: 'MY PROJECTS', 'COLLECTIONS' (highlighted in red), 'CONTRACTORS', and 'LISTS'. The main content area has a header 'Reference Collections' and a sub-header 'Reference Data'. Below this is a tabbed interface with 'COLLECTIONS', 'CONTRACTORS', and 'LISTS'. The 'COLLECTIONS' tab is active, showing a table titled 'Clay County - Iowa Collections'. The table has two columns: 'Collection Name' and 'Last Updated'. One row is visible with the collection name 'Clay County - Iowa reference' (circled in green) and the date 'October 1, 2024'. At the bottom of the table, it says 'Displaying 1 collection'.

Collection Name	Last Updated
Clay County - Iowa reference	October 1, 2024

Four tabs will display near the top and middle of the page: Items, Materials, Item Materials, and Worksheets. Click on the Items tab if it is not already selected.

Reference Collections / Iowa Local Systems _DEMO ACCOUNT Reference Collection

Iowa Local Systems _DEMO ACCOUNT Reference Collection

Last updated: 09/30/2024

ITEMS MATERIALS ITEM MATERIALS WORKSHEETS

Items Add Import Export

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

Item ID	Description	Unit	Fuel Factor	Asphalt Factor
201-01	CLEARING AND GRUBBING	\$1,500.00	0.0000	0.0000

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

Reference Collections / Iowa Local Systems _DEMO ACCOUNT Reference Collection

Iowa Local Systems _DEMO ACCOUNT Reference Collection

Last updated: 09/30/2024

ITEMS MATERIALS ITEM MATERIALS WORKSHEETS

Items Add Import Export

2528-8445110 Search

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

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

The screenshot shows a web application interface for managing reference collections. On the left is a dark sidebar with navigation options: 'MY PROJECTS', 'COLLECTIONS' (highlighted in red), 'CONTRACTORS', and 'LISTS'. The main content area has a breadcrumb trail 'Reference Collections / Iowa Local Systems _DEMO ACCOUNT Reference Collection'. Below this is the title 'Iowa Local Systems _DEMO ACCOUNT Reference Collection' and a timestamp 'Last updated: 09/30/2024'. A horizontal menu contains 'ITEMS' (selected), 'MATERIALS', 'ITEM MATERIALS', and 'WORKSHEETS'. The 'Items' section features a search bar with '2528-8445110' and a 'Search' button. To the right are 'Add', 'Import', and 'Export' buttons. A table displays the search results with columns: 'Item ID', 'Description', 'Unit', 'Fuel Factor', and 'Asphalt Factor'. The first row shows '2528-8445110' (circled in green), 'TRAFFIC CONTROL', 'LS', '0.0000', and '0.0000'. A red 'x' icon is in the final column. At the bottom left of the table, it says 'Displaying 1 item'.

Item ID	Description	Unit	Fuel Factor	Asphalt Factor
2528-8445110	TRAFFIC CONTROL	LS	0.0000	0.0000

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

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

Reference Collections / Iowa Local Systems _DEMO ACCOUNT Reference Collection / 2528-8445110

Iowa Local Systems _DEMO ACCOUNT Reference Collection

Last updated: 09/30/2024

ITEMS MATERIALS ITEM MATERIALS WORKSHEETS

2528-8445110

Edit

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

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.

Iowa Local Systems _DEMO ACCOUNT Reference Collection

Last updated: 09/30/2024

ITEMS MATERIALS ITEM MATERIALS WORKSHEETS

Edit

Save **Cancel**

* Item ID 2528-8445110	* Unit LS
* Description TRAFFIC CONTROL	Options <input type="checkbox"/> Include Supplemental Description? <input checked="" type="checkbox"/> Lump Sum?
Asphalt Factor 0.0000	Fuel Factor 0.0000

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

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

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

The screenshot displays a web application interface with a dark sidebar on the left containing navigation icons for Overview, All Reports, Items (highlighted in red), Time Limits, Funding, Photos, and More. The main content area has a blue header bar with a warning icon and the text "Doing business as Iowa Local Systems _DEMO ACCOUNT. [Switch to another business?](#)". Below this, a breadcrumb trail shows "Projects / 00-C000-xx / Items". The page title is "00-C000-xx" with a red "New" tag, followed by the subtitle "Item Error with .csv Method for Instructions". The "Items" section has an "Edit" button and an "Actions" dropdown. A red error banner states: "Import error: The import couldn't be completed because 1 row contains errors. [Hide Errors](#)". Below the banner, a light red box contains the message: "Item 2121-7425028 (TON) doesn't exist in the reference data". A table placeholder with three columns and three rows is shown, followed by the text "No items found."

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

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

The screenshot shows the 'My Projects' interface. At the top, there are buttons for 'Create Project' and 'Import Project'. Below them is a search bar labeled 'Find Project' and a status filter set to 'New'. A red error banner at the top of the project list states: 'The project couldn't be imported because the JSON file contains errors. Please fix the errors and try the import again. [Show Errors](#)'. The project list below contains three entries, all marked as 'Imported'.

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

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

The screenshot shows the expanded error message. The red banner now lists two specific errors: 'Item 2528-2518000 (EACH) does not exist in the reference data.' and 'The item total doesn't match the awarded amount.' Below the errors, the project list is visible, showing the same three imported projects.

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

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 Iowa DOT 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 Iowa DOT worksheets, first, begin on the main project listing screen. Click on the "Reference Data" button in the left menu and then click on "Collections" in the expanded menu.

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

Projects

My Projects

Create Project Import Project

Find Project Status: Favorites Advanced

Favorites

Project ID	Description	Project Status
★ 01-C001-116 Imported	WORKDAY TEST_FM-C001(116)--55-01, AcctID- 37895, FM-C001(117)--55-01, AcctID- 37896, Letting date- 17 Aug 2021	Construction
★ 01-C001-121 Imported	FM-C001(121)--55-01, Acct ID- 39562, Letting Date- July 18, 2023	Construction
★ 04-C004-116 Imported	FM-C004(116)--55-04, Acct ID- 38373, Letting Date- February 15, 2022	Construction
★ 09-C009-088 Imported	TEST FOR WORKDAY_Correct NTP date_BROS-SWAP-C009(88)--FE-09, AcctID- 37865, Letting Date- 20 July 2021	Construction

Next, click on the blue text for the desired Reference Data Collection. Each agency will have their own reference data collection(s) under the “XXXX County/City – Iowa Collections” section. Additionally, the Iowa DOT’s reference data collection(s) will be listed under the Shared Collections section (along with any other public collections). Shared collections are only editable by the creating agency, so Iowa LPA’s will not be able to edit (add/delete items) the Iowa DOT collection; however, LPAs can edit their own collection. To edit your agency’s collection, click on the blue collection name.

Reference Collections

Reference Data

COLLECTIONS CONTRACTORS LISTS

Clay County - Iowa Collections

Collection Name	Last Updated
Clay County - Iowa reference	October 1, 2024

Displaying 1 collection

Five tabs will display near the top and middle of the page: Items, Materials, Item Materials, Worksheets, and Shared. Click on the Worksheets tab if it is not already selected.

MY PROJECTS

COLLECTIONS

CONTRACTORS

LISTS

Reference Collections / Hancock County - Iowa reference

Hancock County - Iowa reference
Last updated: 10/01/2024

ITEMS MATERIALS ITEM MATERIALS **WORKSHEETS** SHARED

Items

Export

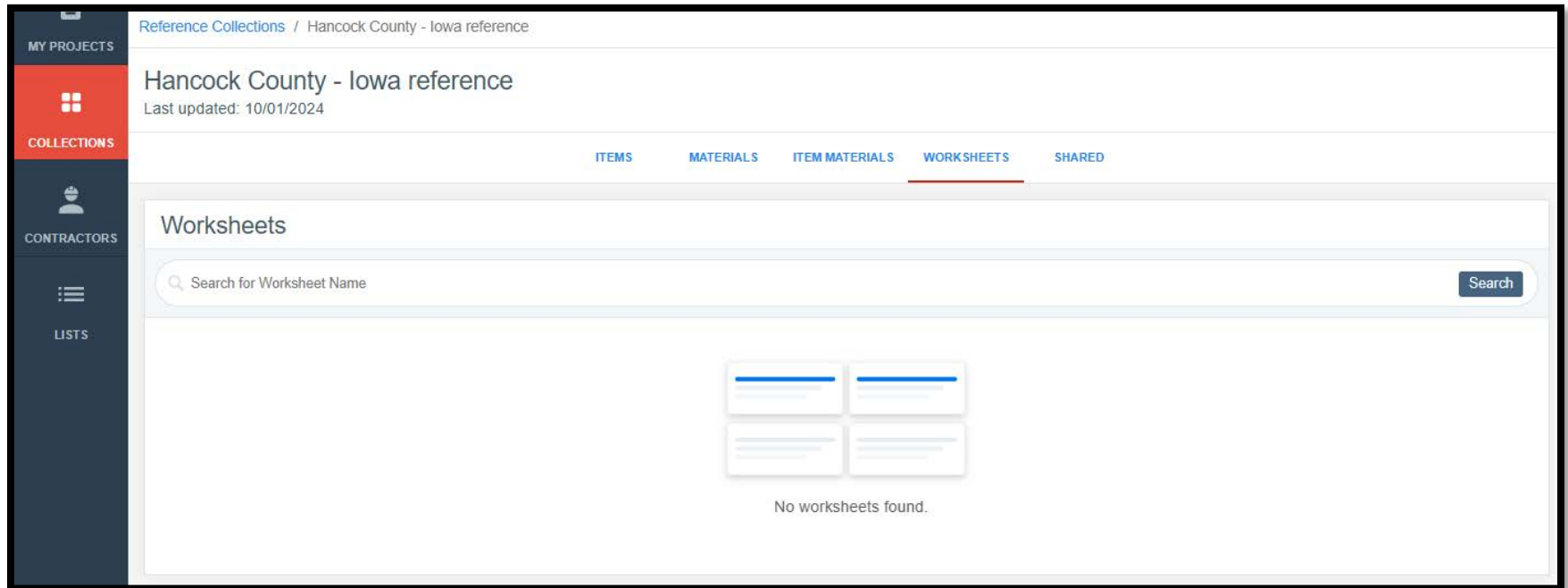
Search for Item ID, Description, Unit, Fuel Factor or Asphalt Factor

Search

Item ID	Description	Unit	Fuel Factor	Asphalt Factor
2101-0850001	CLEAR+GRUBB	ACRE	0.0000	0.0000
2101-0850002	CLEAR+GRUBB	UNIT	0.0000	0.0000
2101-1001000	RMVL OF FLOOD DEBRIS	LS	0.0000	0.0000
2102-0425046	SELECTED BACKFILL	CY	0.0000	0.0000
2102-0425070	SPECIAL BACKFILL	TON	0.0000	0.0000
2102-0425071	SPECIAL BACKFILL	CY	0.0000	0.0000

You will be brought to the Worksheets screen showing either no associated worksheets present or some associated worksheets present (see screenshots below). 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 (if present), click on the name of the worksheet.

Example: No worksheets currently associated



Note: Worksheets should have been imported as part of your agency's onboarding. If worksheets are not present, contact the E-Construction Administrator so that can connect you to the Infotech onboarding team.

Example: Some worksheets currently associated

Reference Collections / Appanoose County - Iowa reference

Appanoose County - Iowa reference

Last updated: 10/01/2024

ITEMS MATERIALS ITEM MATERIALS **WORKSHEETS** SHARED

Worksheets

Search for Worksheet Name Search

Area: Square Foot	Area: Square Yard	Binder Emulsion	Flaggers Pilot Cars	HMA Mix	Lump Sum
Pavement Markings	Weight with Yield				

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.

The screenshot displays the 'Iowa Local Systems _DEMO ACCOUNT Reference Collection' interface. The left sidebar contains navigation options: 'MY PROJECTS', 'COLLECTIONS', 'CONTRACTORS', and 'LISTS'. The main header shows the collection name and a breadcrumb trail: 'Reference Collections / Iowa Local Systems _DEMO ACCOUNT Reference Collection / Area: Square Yard'. Below the header, there are tabs for 'ITEMS', 'MATERIALS', 'ITEM MATERIALS', and 'WORKSHEETS'. The 'WORKSHEETS' tab is active, showing the 'Area: Square Yard Item Association' screen. In the top right corner of this screen, the 'Associate Items' button is highlighted with a green circle. Below this button, a blue notification bar states: '0 eligible item(s) have been selected for removal from worksheet. Select all eligible items?'. The main content area includes a form for 'Area: Square Yard' with fields for 'length * width / 9', 'Length (FT)', and 'Width (FT)'. A search bar is located below the form, with the placeholder text 'Search for Item ID, Description or Unit' and a 'Search' button. At the bottom, a table lists items with columns for 'Item ID', 'Description', 'Unit', and a 'Select All' checkbox. The table contains four rows of data:

Item ID	Description	Unit	Select All
2010-108-G-0	Subgrade Preparation	SY	<input checked="" type="checkbox"/>
2010-108-H-0	Subgrade Treatment, ____ (Type)	SY	<input checked="" type="checkbox"/>
2010-108-I-0	Subbase, ____ (Type)	SY	<input checked="" type="checkbox"/>
2103-0000100	PRESPLITTING OF ROCK CUT	SY	<input checked="" type="checkbox"/>

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

Reference Collections / Iowa Local Systems _DEMO ACCOUNT Reference Collection / Area: Square Yard

Iowa Local Systems _DEMO ACCOUNT Reference Collection

Last updated: 09/30/2024

ITEMS MATERIALS ITEM MATERIALS **WORKSHEETS**

Add Item(s) to Area: Square Yard Save Cancel

Search

<input type="checkbox"/>	Item ID	Description	Unit
<input type="checkbox"/>	201-01	CLEARING AND GRUBBING	\$1,500.00
<input type="checkbox"/>	201-05.31	VEGETATION REMOVAL	\$2,000.00
<input type="checkbox"/>	201-07.01	REMOVAL AND DISPOSAL OF BRUSH & TREES	\$2,500.00

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.

Reference Collections / Iowa Local Systems _DEMO ACCOUNT Reference Collection / Area: Square Yard

Iowa Local Systems _DEMO ACCOUNT Reference Collection

Last updated: 09/30/2024

ITEMS MATERIALS ITEM MATERIALS WORKSHEETS

Add Item(s) to Area: Square Yard

Search for Item ID, Description or Unit Search

<input type="checkbox"/>	Item ID	Description	Unit
<input type="checkbox"/>	2128-0000110	FURNISH AND APPLY GRANULAR SHOULDER MATERIAL	CY
<input type="checkbox"/>	2128-0000120	FURNISH AND APPLY GRANULAR SHOULDER MATERIAL	TON
<input type="checkbox"/>	2128-0000200	CONTRACTOR STOCKPILED SHOULDER MATERIAL	TON
<input type="checkbox"/>	2201-0505050	BASE, STANDARD OR SLIP FORM P.C. CONCRETE, 5 IN.	SY
<input checked="" type="checkbox"/>	2201-0505060	BASE, STANDARD OR SLIP FORM P.C. CONCRETE, 6 IN.	SY
<input type="checkbox"/>	2201-0505065	BASE, STANDARD OR SLIP FORM P.C. CONCRETE, 6.5 IN.	SY

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

The screenshot displays the 'Iowa Local Systems _DEMO ACCOUNT Reference Collection' interface. A green notification bar at the top states 'The worksheet has been updated.' Below it, a blue bar indicates 'Doing business as Iowa Local Systems _DEMO ACCOUNT. Switch to another business?'. The breadcrumb trail shows 'Reference Collections / Iowa Local Systems _DEMO ACCOUNT Reference Collection / Area: Square Yard'. The main title is 'Iowa Local Systems _DEMO ACCOUNT Reference Collection' with a subtitle 'Last updated: 09/30/2024'. The 'WORKSHEETS' tab is selected, showing the 'Area: Square Yard Item Association' section. This section includes a blue bar with the message '0 eligible item(s) have been selected for removal from worksheet. Select all eligible items?'. Below this, the 'Area: Square Yard' calculation is shown as 'length * width / 9'. A table lists three items: '2010-108-G-0 Subgrade Preparation', '2010-108-H-0 Subgrade Treatment, ____ (Type)', and '2010-108-I-0 Subbase, ____ (Type)', all with a unit of 'SY'. A 'Search' button is located at the bottom right of the table.

MY PROJECTS

COLLECTIONS

CONTRACTORS

LISTS

The worksheet has been updated.

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

Reference Collections / Iowa Local Systems _DEMO ACCOUNT Reference Collection / Area: Square Yard

Iowa Local Systems _DEMO ACCOUNT Reference Collection

Last updated: 09/30/2024

ITEMS MATERIALS ITEM MATERIALS WORKSHEETS

Area: Square Yard Item Association

Associate Items Disassociate Items

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

Area: Square Yard

length * width / 9

Length (FT) Width (FT)

Search for Item ID, Description or Unit Search

Item ID	Description	Unit	Select All
2010-108-G-0	Subgrade Preparation	SY	<input checked="" type="checkbox"/>
2010-108-H-0	Subgrade Treatment, ____ (Type)	SY	<input checked="" type="checkbox"/>
2010-108-I-0	Subbase, ____ (Type)	SY	<input checked="" type="checkbox"/>

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.

Area: Square Yard Item Association

Associate Items | Disassociate Items

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

Area: Square Yard
length * width / 9

Length (FT) Width (FT)

Search for Item ID, Description or Unit Search

Item ID	Description	Unit	Select All
2122-5500090	PAVED SHOULDER, HOT MIX ASPHALT MIXTURE, 9 IN.	SY	<input checked="" type="checkbox"/>
2122-5500095	PAVED SHOULDER, HOT MIX ASPHALT MIXTURE, 9.5 IN.	SY	<input type="checkbox"/>
2122-5500100	PAVED SHOULDER, HOT MIX ASPHALT MIXTURE, 10 IN.	SY	<input type="checkbox"/>
2201-0505060	BASE, STANDARD OR SLIP FORM P.C. CONCRETE, 6 IN.	SY	<input type="checkbox"/>

Click "Ok" in the pop-up window.

demo2.appia.net says

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

OK Cancel

19 - Reference Data: Contractors

(System Administrator access level required.)

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

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

Projects

My Projects

Create Project Import Project

Find Project Status: Favorites Advanced

Favorites

Project ID	Description	Project Status
★ 01-C001-116 Imported	WORKDAY TEST_FM-C001(116)--55-01, AcctID- 37895, FM-C001(117)--55-01, AcctID- 37896, Letting date- 17 Aug 2021	Construction
★ 01-C001-121 Imported	FM-C001(121)--55-01, Acct ID- 39562, Letting Date- July 18, 2023	Construction
★ 04-C004-116 Imported	FM-C004(116)--55-04, Acct ID- 38373, Letting Date- February 15, 2022	Construction
★ 09-C009-088 Imported	TEST FOR WORKDAY_Correct NTP date_BROS-SWAP-C009(88)--FE-09, AcctID- 37865, Letting Date- 20 July 2021	Construction
★ 15-C015-072 Imported	BROS-SWAP-C015(72)--FE-15, AcctID- 37709, Letting Date- 20 April 2021	Construction
★ 17-C017-035 Imported	BROS-C017(35)--8J-17, Acct ID- 39521, Letting Date- January 17, 2024	Construction
★ 21-C021-153 Imported	STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022	Construction
★ 22-C022-096 Imported	FM-C022(96)--55-22, Acct ID- 39588, Letting Date- July 18, 2023	Construction

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

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

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

The screenshot shows the 'Reference Data / Contractors' page in the Appia system. The left sidebar contains navigation options: MY PROJECTS, ITEMS, MATERIALS, ITEM MATERIALS, WORKSHEETS, and CONTRACTORS (which is highlighted in red). The main content area is titled 'Contractors' and features a search bar with the placeholder text 'Search for Organization or Contractor ID'. In the top right corner of the main area, there are three buttons: 'Add' (circled in green), 'Import', and 'Export'. Below the search bar is a table with two columns: 'Organization' and 'Contractor ID'. The table lists several contractors, including '1ST AEROW VALUATION GROUP, LLC', '1ST CALL LAWN CARE', '1 STOP SIGN & SAFETY INC.', '1ST RESOURCE SOLUTIONS, LLC', '2 UNIQUE, INC.', '300 INDUSTRIAL, LLC', '360 CONCRETE SERVICES, LLC', '360 DOT CONSTRUCTION COMPANY, INC.', '3D EROSION CONTROL', '3 G CONSTRUCTION, INC.', '3M COMPANY', '4C'S CONSULTING, LLC', and '4J FENCE COMPANY'. Each row has a red 'X' icon in the right margin.

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

Enter the appropriate information on this screen.

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

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

The screenshot shows a web application interface for adding a new contractor. The left sidebar contains navigation links: MY PROJECTS, ITEMS, MATERIALS, ITEM MATERIALS, WORKSHEETS, CONTRACTORS (highlighted in red), LISTS, and HELP. The main content area is titled 'New' and contains the following fields:

- Contractor ID**: A text input field.
- Organization**: A text input field.
- Contact Person**: A text input field.
- Phone**: A text input field.
- Fax**: A text input field.
- Email**: A text input field.
- Address**: A text input field.
- City**: A text input field.
- State**: A dropdown menu with the selected option being "** None Selected **".
- Postal Code**: A text input field.
- DBE/MBE/WBE?**: A dropdown menu with the selected option being "** None Selected **".

In the top right corner of the form, there are two buttons: "Save" (highlighted with a green circle) and "Cancel".

At the bottom of the page, there is a footer with contact information: support@appia.net (888) 352-2439. On the right side of the footer, there is a copyright notice: Copyright© 2020 by Info Tech, Inc., DBA Infotech. Appia® is a registered trademark of Infotech. Terms / Privacy / DMCA.

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

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

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

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

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

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

Columns that must have names assigned:

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

Reference Data / Contractors / Import

Import Contractors

Import Cancel

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

Options
☐ Allow existing data to be overwritten?

Preview (first 10 out of 2883 rows)

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

Reference Data / Contractors / Import

MY PROJECTS

ITEMS

MATERIALS

ITEM MATERIALS

WORKSHEETS

CONTRACTORS

LISTS

HELP

Import Contractors

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

Options
☐ Allow existing data to be overwritten?

Preview (first 10 out of 2883 rows)

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

Import Contractors

Import Cancel

Select number of rows to skip

.. None Selected ..

Options

☐ Allow existing data to be overwritten?

Preview (first 10 out of 2883 rows)

Address	Unassigned Column	City	State	Postal Code	Phone	Fax	Email
W. LIBERTY ST. 1ST FLOOR		HUBBARD	OH	44425	(330)568-4380	(330)568-4381	INDUSTRIAL300@YAHOO.COM
W. LIBERTY ST. 1ST FLOOR		HUBBARD	OH	44425	(330)568-4380	(330)568-4381	INDUSTRIAL300@YAHOO.COM
W. LIBERTY ST. 1ST FLOOR		HUBBARD	OH	44425	(330)568-4380	(330)568-4381	INDUSTRIAL300@YAHOO.COM
MILLA MARIE ROAD		LOWELLVILLE	OH	44436	(330)507-6171		ajd@aadcontracting.com
MILLA MARIE ROAD		LOWELLVILLE	OH	44436	(330)507-6171		ajd@aadcontracting.com
BEECH CIRCLE		CAMPBELL	OH	44405	(330)750-0637	(330)750-0637	AAPAININGPLUS@AOL.COM
BEECH CIRCLE		CAMPBELL	OH	44405	(330)750-0637	(330)750-0637	AAPAININGPLUS@AOL.COM
BEECH CIRCLE		CAMPBELL	OH	44405	(330)750-0637	(330)750-0637	AAPAININGPLUS@AOL.COM
BALDUR PARK)		WAYZATA	MN	55391	(952)210-2655		selliott9369@gmail.com
BALDUR PARK)		WAYZATA	MN	55391	(952)210-2655		selliott9369@gmail.com

support@annia.net

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

Click “Import”.

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

Reference Data / Contractors

Contractors

Add Import Export

2883 rows successfully imported.

Search for Organization or Contractor ID Search

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

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.

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

Projects

My Projects

Create Project Import Project

Find Project Status: Favorites Advanced

Favorites

Project ID	Description	Project Status
★ 01-C001-116 Imported	WORKDAY TEST_FM-C001(116)--55-01, AcctID- 37895, FM-C001(117)--55-01, AcctID- 37896, Letting date- 17 Aug 2021	Construction
★ 01-C001-121 Imported	FM-C001(121)--55-01, Acct ID- 39562, Letting Date- July 18, 2023	Construction
★ 04-C004-116 Imported	FM-C004(116)--55-04, Acct ID- 38373, Letting Date- February 15, 2022	Construction
★ 09-C009-088 Imported	TEST FOR WORKDAY_Correct NTP date_BROS-SWAP-C009(88)--FE-09, AcctID- 37865, Letting Date- 20 July 2021	Construction
★ 15-C015-072 Imported	BROS-SWAP-C015(72)--FE-15, AcctID- 37709, Letting Date- 20 April 2021	Construction
★ 17-C017-035 Imported	BROS-C017(35)--8J-17, Acct ID- 39521, Letting Date- January 17, 2024	Construction
★ 21-C021-153 Imported	STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022	Construction
★ 22-C022-096 Imported	FM-C022(96)--55-22, Acct ID- 39588, Letting Date- July 18, 2023	Construction

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

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

- Change Order Custom Fields – Refer to [Section B. Editing Lists](#) for guidance on creating this list. The following items need to be included in this list. (Hint: Copy/paste them directly from these instructions, without the bullet, when creating your list.)
 - B - Reason for change:
 - C - Settlement for cost(s) of change as follows with items addressed in Sections F and/or G:
 - D - Justification for cost(s) (See I.M. 6.000 Attachment D, Chapter 2.36, for acceptable justification):
 - E - Contract time adjustment:
- Change Order Type – This contains the types of change orders.
 - Substantial
 - Non-Substantial
- 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. The following items need to be included in this list.
 - Approved Brands (AB)
 - Approved Catalog Cut
 - Approved Shop Drawings (ASD)
 - Approved Source (AS)
 - Certification (Cert.)
 - Inspection Report
 - Sampling & Testing (S&T)
 - Visual Approval by the Engineer
 - Payrolls Received – NEW as of January 2025. Add this if not present.
 - Liquidated Damages Addressed – NEW as of January 2025. Add this if not present.
- Work Type – This lists all of the contract work types.

ITEMS

MATERIALS

ITEM MATERIALS

WORKSHEETS

CONTRACTORS

LISTS

Lists

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

Help

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

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



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

B. [Editing Lists](#)

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

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

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

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

Daily Report Custom Fields

Save Cancel

Add Value

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

Example: Change Order Custom Fields

Change Order Custom Fields

SaveCancel

* Value

B - Reason for change:

* Value

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

* Value

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

* Value

E - Contract time adjustment:

Add Value

208

Example: Change Order Type

Change Order Type

SaveCancel

* Value

Non-Substantial

* Value

Substantial

Add Value

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

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

Change Order Custom Fields

Save Cancel

* Value
B - Reason for change:

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

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

Add Value

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

Change Order Custom Fields

Save Cancel

* Value ✕

B - Reason for change:

* Value ✕

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

* Value ✕

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

* Value ✕

Add Value

C. Importing Lists

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

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

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

Import values for Change Order Type

Cancel

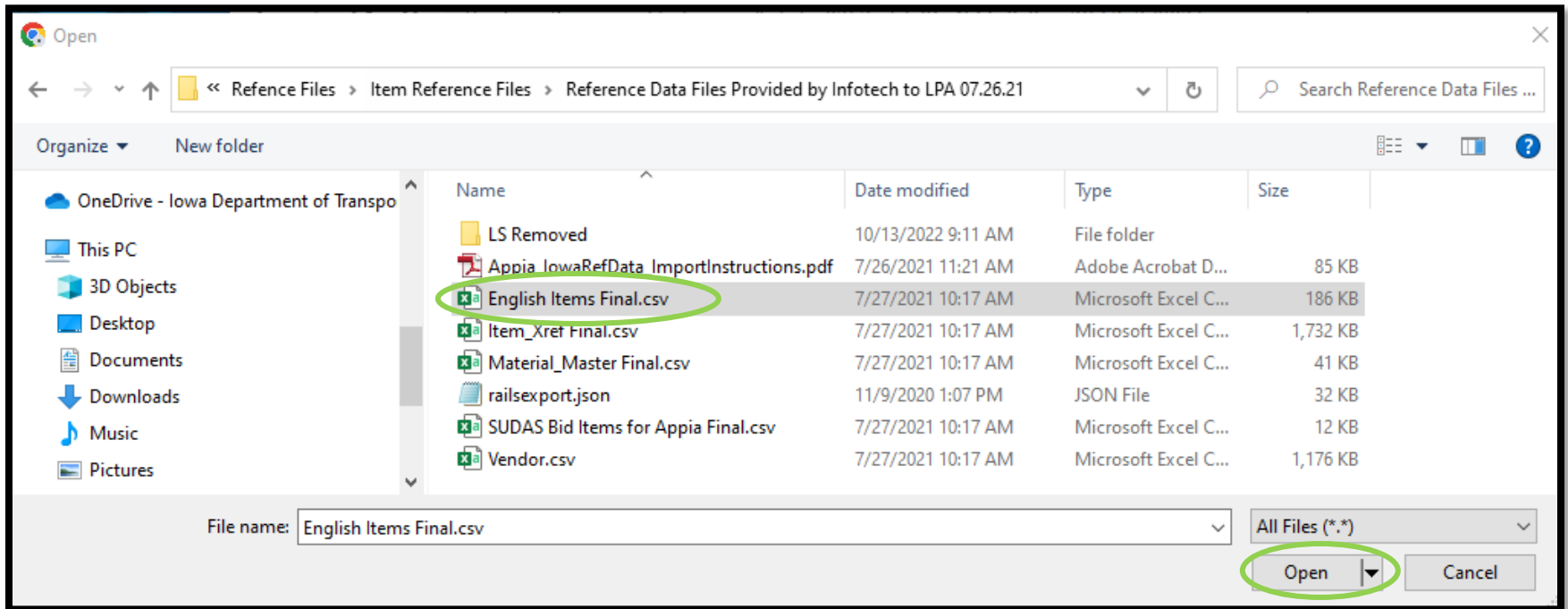
Choose a CSV or Excel file to import.

Choose File

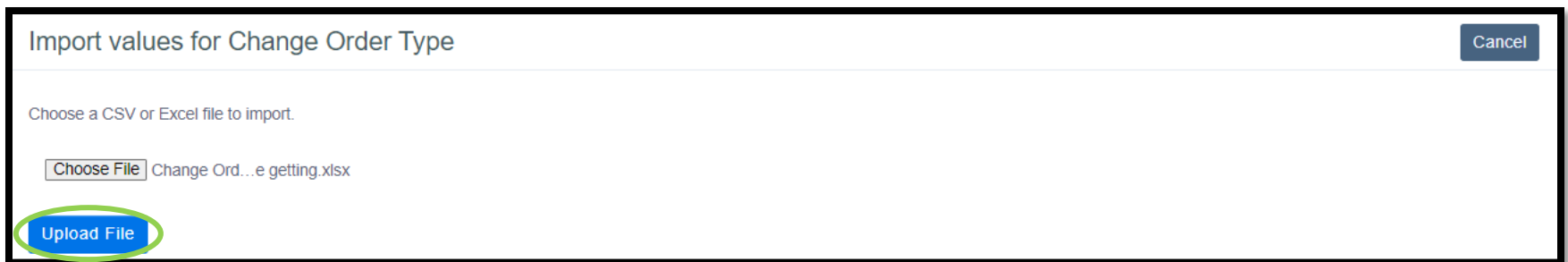
No file chosen

Upload File

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



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



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

Import values for Change Order Type

ImportCancel

Select number of rows to skip

** None Selected **

Preview (first 10 out of 6 rows)

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

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

Import values for Change Order Type Import Cancel

Select number of rows to skip

** None Selected **

Preview (first 10 out of 7 rows)

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

Import values for Change Order Type Import Cancel

Select number of rows to skip

** None Selected **

1

2

3

4

5

6

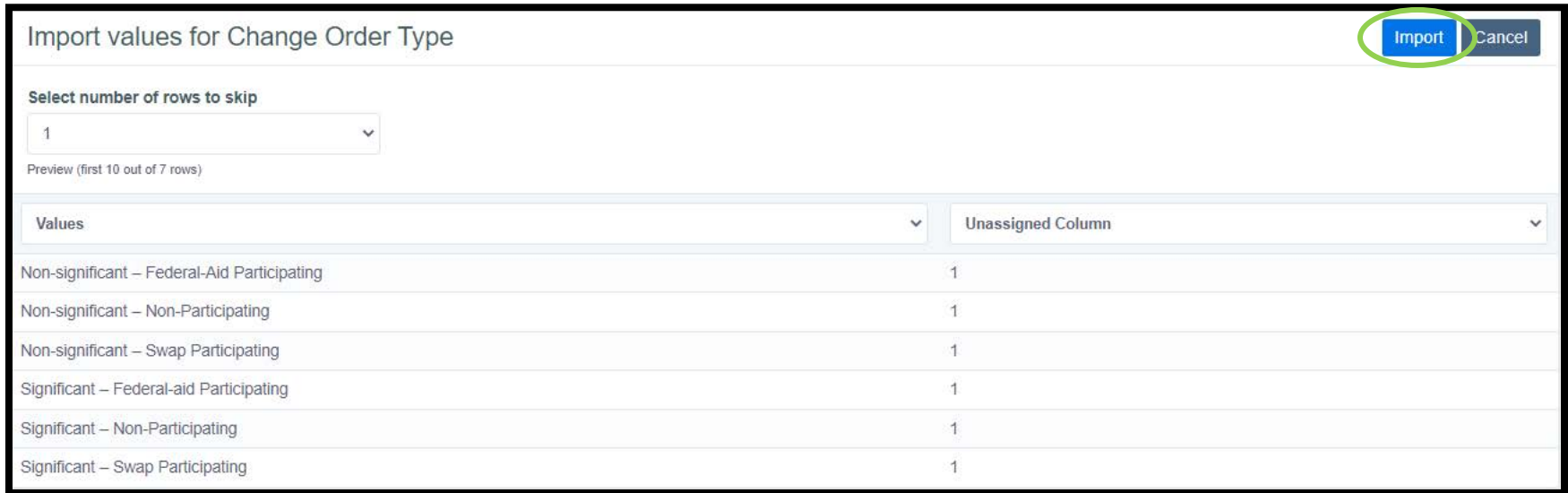
7

8

9

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

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



Import values for Change Order Type

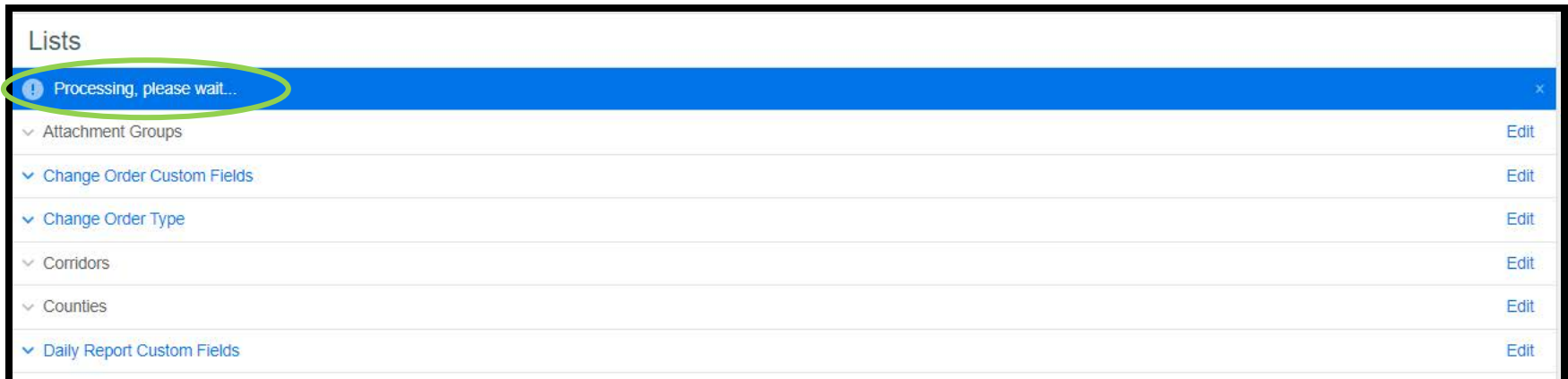
Select number of rows to skip

1

Preview (first 10 out of 7 rows)

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

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



Lists

Processing, please wait...

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

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

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

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

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

The screenshot shows the 'My Projects' interface. At the top, there are buttons for 'Create Project' and 'Import Project'. Below them is a search bar labeled 'Find Project' and a status filter set to 'New'. A red error banner at the top of the project list states: 'The project couldn't be imported because the JSON file contains errors. Please fix the errors and try the import again. [Show Errors](#)'. The project list below has columns for 'Project ID' and 'Description'. Three projects are listed, all marked as 'Imported'.

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

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

This screenshot shows the 'New' page with the error banner expanded. The error message now includes: 'Work Type BRIDGE REPLACEMENT - CCS does not exist in the reference data.' The project list below remains the same as in the previous screenshot.

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

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

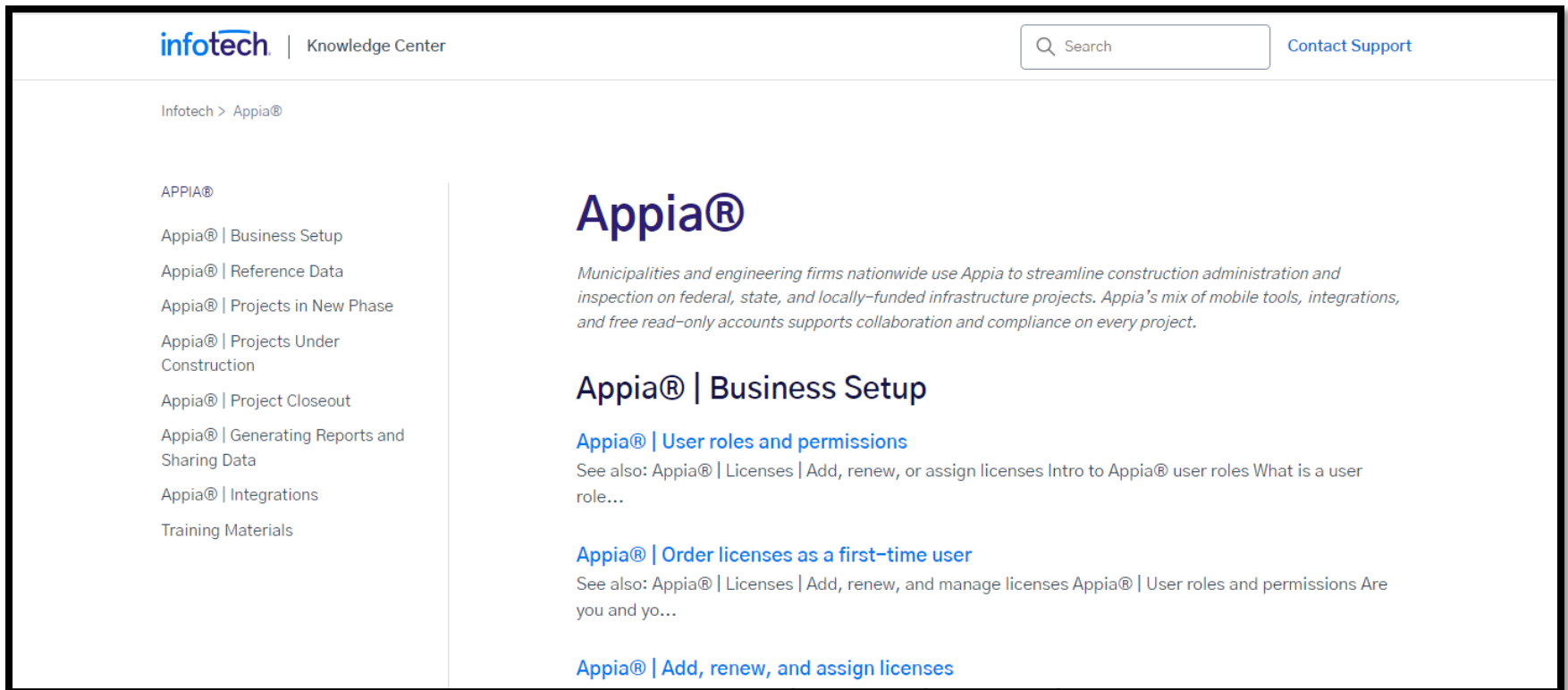
“Help” Site

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

The screenshot displays the Appia software interface. In the top right corner, there is a notification bell icon, a help icon (a circle with a question mark), and a user initials icon 'NS'. The help icon is circled in green. A dropdown menu is open from the help icon, showing three options: 'Support', 'Knowledge Builder', and 'Knowledge center'. The 'Knowledge center' option is highlighted with a green circle and includes an external link icon. The main interface shows a sidebar with 'OVERVIEW', 'QUERY', and 'ALL REPORTS' sections. The main content area displays project information for '21-C021-153', which is marked as 'Under Construction'. It includes an 'Overview' section and a table with financial data.

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

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



Local Systems Contact Information

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

Account set-up and management assistance, Project set-up,
Technical assistance

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)

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)

