

# Appia

## Project Administration & Close- Out Instruction Manual ("Under Construction" Instructions)

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Note: Some sections of these instructions are currently incomplete. However, this version has been published in order to get as much information out as possible.

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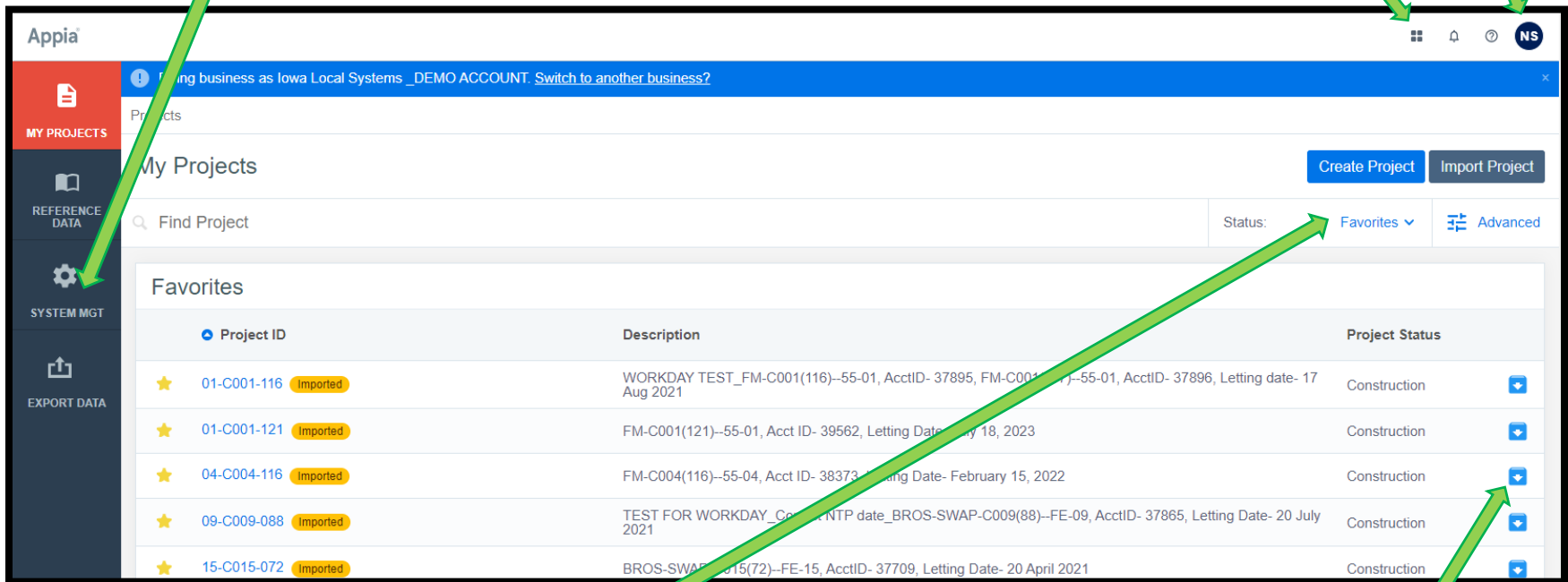


# 1 - Basic Navigation

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

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

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



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

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

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

# 2 - Accessing Your Project

## A. Project Listing

To navigate to the desired project, select the project from the list on the main “Projects” screen.

The screenshot displays the 'My Projects' interface. At the top, there are buttons for 'Create Project' and 'Import Project'. Below these is a search bar labeled 'Find Project' and a status filter set to 'Under Construction'. The main content area is titled 'Under Construction' and contains a table of projects. The table has two columns: 'Project ID' and 'Description'. The project '86-C086-060 - 31961' is highlighted with a green circle. A 'Help' button is located at the bottom right of the table.

| Project ID  | Description   |
|---|---|
| 03-C003-062 <small>Imported</small>                   | 03-C003-062   |
| 08-C008-079 <small>Imported</small>                   | BROS-SWAP-C008(79)--SE-08 - 36477 Letting Date: January 22, 2020  |
| 11-C011-071 <small>Imported</small>                   | STP-S-C011(71)--5E-11 - 29427 - USING TO TEST BALANCING CHANGE ORDER AT CLOSE-OUT   |
| 15-C015-065 <small>Imported</small>                   | BRS-SWAP-C015(65)--FF-15, Acct ID: 36986, Letting Date: July 21, 2020   |
| 21-2912-601 <small>Imported</small>                   | BRS-SWAP-2912(601)--FF-21, Acct ID-37099  |
| 25-C025-118 <small>Imported</small>                   | FM-C025(118)--55-25: Acct ID 37059, Letting Date: August 18, 2020   |
| 36-C036-074 JSON TEST/FINANCE <small>Imported</small> |   |
| 39-C039-093_Cass and Guthrie <small>Imported</small>  | BROSCHBP-C039(93)--GA-39, Acct ID-37106 and BROSCHBP-C015(71)--GA-15, Acct ID-37105   |
| 54-C054-117 <small>Imported</small>                   | BRS-CHBP-C054(117)--GB-54, Acct ID: 37045, BROSCHBP-C058(61)--GA-58, Acct ID: 37046, BROSCHBP-C092(109)--NC-92, Acct ID: 37047, Letting Date: August 18, 2020 |
| 54-C054-117 W <small>Imported</small>                 | Washington County BROSCHBP-C092(109)--NC-92 - 37047, Letting Date: August 18, 2020  |
| 86-C086-060 - 31961                                   | Gladbrook Bridge Replacement Letting Date: October 21, 2014   |
| BHM-SWAP-1827(684)--SA-82-1 12345                     | Reconstruction Bridge Deck  |

## B. Project Overview Page

Once you have clicked into a project from the main project listing screen, you will be taken to the selected project's "Overview" screen. There are a number of summary blocks and widgets on this screen which show the basic project information. Many of these widgets will update to show current statistics as the project progresses.

The screenshot displays the 'Overview' page for project 75-C075-166. The interface includes a top navigation bar with a status message: 'Doing business as Iowa Local Systems \_DEMO ACCOUNT. Switch to another business?'. Below this, the breadcrumb 'Projects / 75-C075-166' is visible. The project title '75-C075-166' is accompanied by a red 'Under Construction' tag. A sub-header 'STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- November 15, 2022' provides further details. A left-hand sidebar contains navigation options: OVERVIEW, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, and TIME LIMITS. The main content area is titled 'Overview' and features an 'Edit' button. It is divided into several sections: 'General Information' with expandable sections for Project, Location, and Management; 'Awarded Amount' and 'Authorized Amount' both at \$2,482,485.15; 'Approved Changes' at \$0.00; 'Description' with project details; and 'Amount Paid' showing 0% of both awarded and authorized amounts.

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

Projects / 75-C075-166

75-C075-166 Under Construction

STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- November 15, 2022

### Overview Edit

**General Information**

**Project**

Work Type  
PCC PAVEMENT WIDENING / PCC RESURFACING

**Location**

Location  
On K 49, from C38 N 1 miles to 231 ft. north of 200th St.; In the city of Le Mars, on K49 from 18th Street SE south to 774 ft. south of 200th St.

**Management**

Prime Contractor  
GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.

Created By

**Awarded Amount** \$2,482,485.15

**Authorized Amount** \$2,482,485.15

**Approved Changes** \$0.00

**Description**

STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- November 15, 2022

**Amount Paid**

Amount paid so far: \$0.00

0% of your Awarded \$2,482,485.15

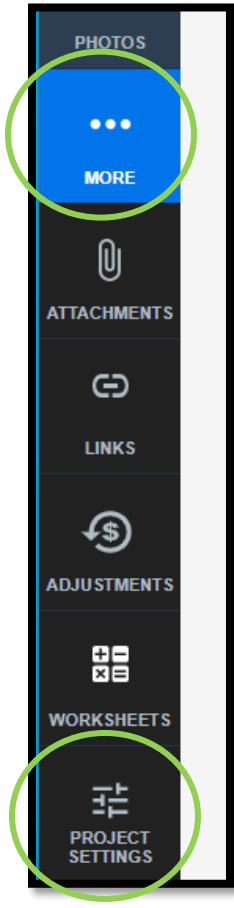
0% of your Authorized \$2,482,485.15

0%

# 3 - Integrating Appia with Doc Express for Submittals

If the Appia – Doc Express integration is enabled, payments and change orders can be sent directly from Appia to Doc Express, and Doc Express transition statuses are delivered back to Appia. The use of this integration functionality is required for the automated payment process, which applies to county projects on the Farm-to-Market system let on or after January 2024.

To enable the Doc Express integration, click into the desired project. Once in the project, click on the “More” left menu button. Then, click on “Project Settings” in the expanded menu.



In the Project Settings window, click on the "Integrations" tab near the top, center of the screen.

The screenshot shows the 'Project Settings' window for project '08-C008-089' (Under Construction). The 'INTEGRATIONS' tab is highlighted with a green circle. The page contains the following sections:

- Report Display Name:** A text input field with a placeholder. Below it, a note states: "Name to use in place of the agency name on PDF reports. If left blank, the agency name will be used."
- Report Logo:** A 'Choose File' button and the text 'No file chosen'. Below this is a preview of a logo with the text 'IOWA DOT'.
- Report Logo Preference:** Three radio button options:
  - Do not display a logo
  - Display the Appia product logo.
  - Display your organization's logo

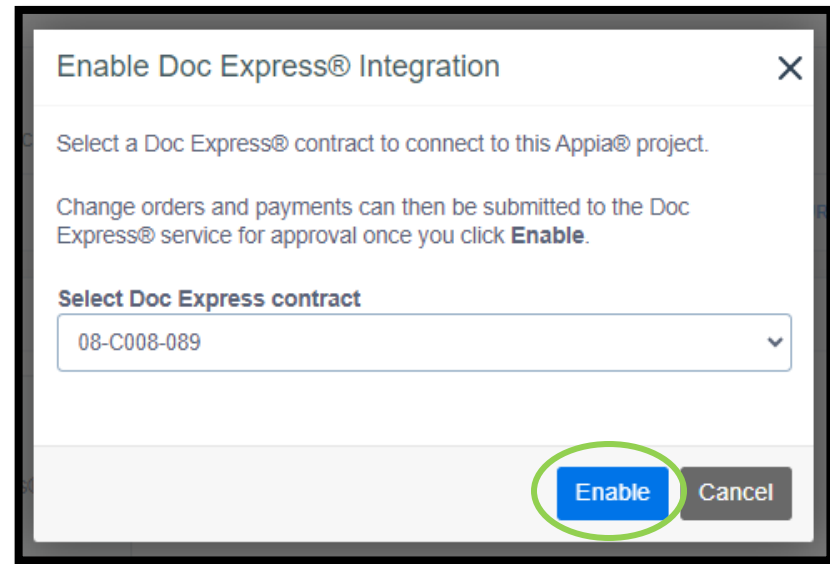
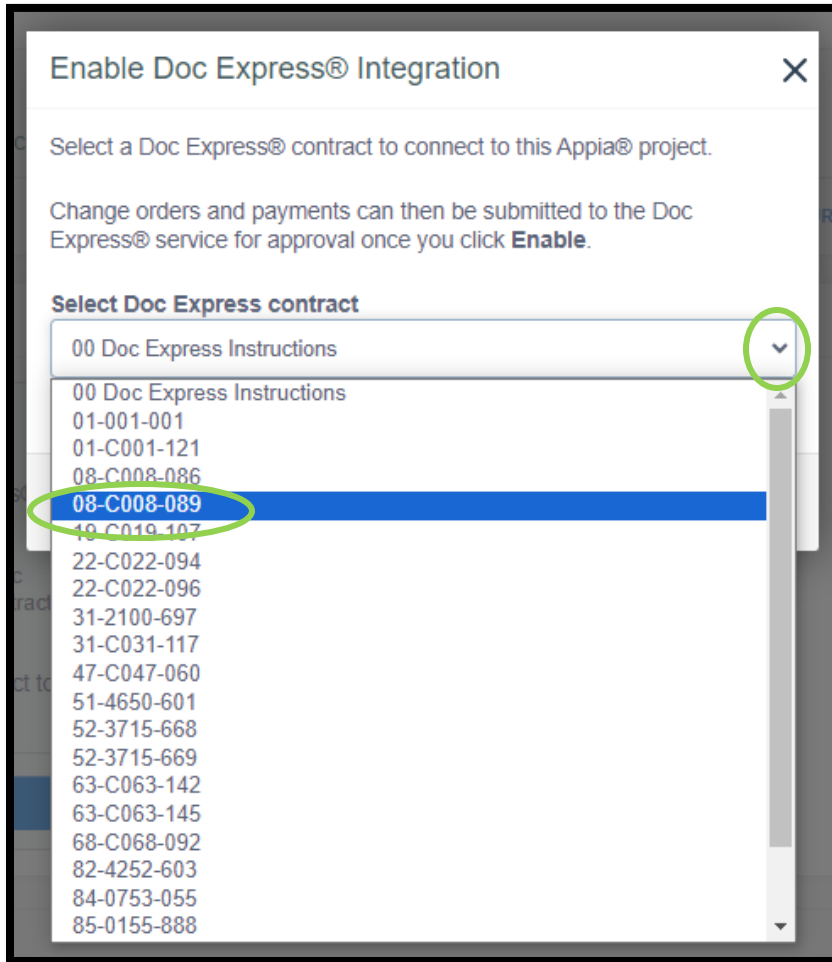
The footer of the page includes the 'infotech' logo on the left and the following text on the right: "Copyright © 2023, Infotech®. All rights reserved. Appia® is a registered trademark of Infotech. Terms / Privacy / DMCA".



This will bring you to the Integrations screen. On the integrations screen, a Doc Express® Integration box will display. Click on the blue “Enable Integration” button at the bottom of the box.

The screenshot shows the 'Project Settings' page for project '08-C008-089' in an 'Under Construction' state. The page has a sidebar with navigation options: OVERVIEW, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, and STOCKPILES. The main content area has tabs for GENERAL, CONSTRUCTION, INTEGRATIONS (selected), and PROJECT SECURITY. The 'Project Settings' section contains a 'Doc Express® Integration' box with the following text: 'Send payments and change orders to the Doc Express® service for approval. Make sure that users submitting documents to the Doc Express® service have access to the appropriate contract and drawers. Click **Enable Integration** to connect this Appia® project to a Doc Express® contract.' A blue button labeled 'Enable Integration' is located at the bottom of this box and is circled in green. The infotech logo is visible at the bottom left of the page.

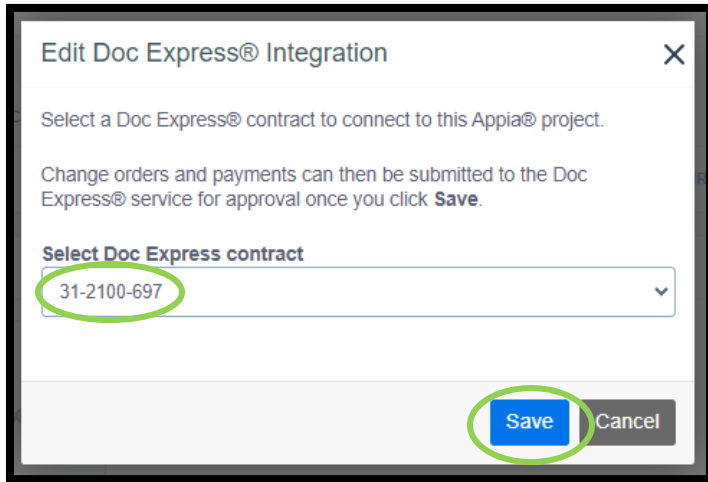
A pop-up box will appear called "Enable Doc Express® Integration. In the box is a pull-down menu under "Select Doc Express contract". In the pull-down menu, find and select the Doc Express contract that matches the contract ID of the Appia contract being connected. Once the appropriate contract has been selected and is displaying, click the blue "Enable" button in the lower, right corner of the pop-up box.



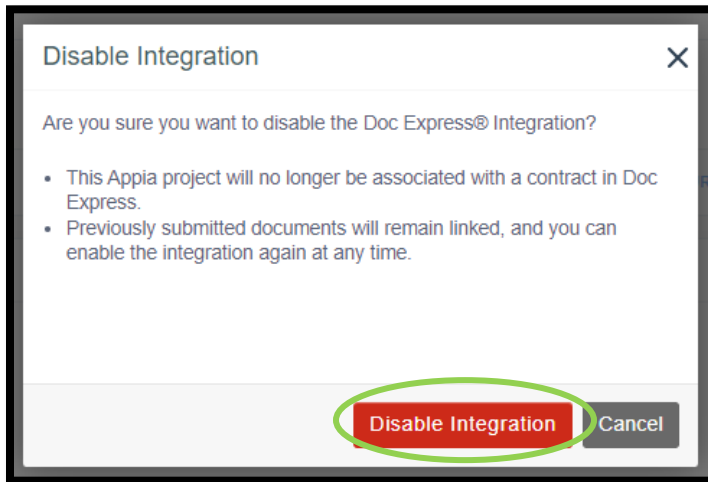
You will be returned to the Integrations screen. In the Doc Express Integration box, there will be a green circle with a check mark and the word "Enabled" next to the Doc Express® Integration box label. Verify that the selected contract ID matches the contract ID of your Appia project.

The screenshot displays the 'Project Settings' page for project '08-C008-089'. The breadcrumb trail at the top reads 'Projects / 08-C008-089 / Settings'. The project ID '08-C008-089' is circled in green. Below it, a red 'Under Construction' tag is visible. The project details include 'FM-C008(09)-55-08, Acct ID- 39638, Letting Date- March 12, 2023'. The navigation tabs are 'GENERAL', 'CONSTRUCTION', 'INTEGRATIONS' (which is selected), and 'PROJECT SECURITY'. The 'Project Settings' section features a 'Doc Express® Integration' toggle set to 'Enabled', with the word 'Enabled' circled in green. Below this, instructions state: 'Send payments and change orders to the Doc Express® service for approval. Make sure that users submitting documents to the Doc Express® service have access to the appropriate contract and drawers.' The 'Doc Express Contract' is listed as '08-C008-089', which is also circled in green. At the bottom of the settings box are two buttons: 'Change Contract' and 'Disable Integration'.

If you mistakenly chose the wrong contract, click on the blue “Change Contract” button. A pop-up window similar to the one previously described will appear. Select a different contract from the pull-down menu then click the blue “Save” button in the lower, right corner of the pop-up box.

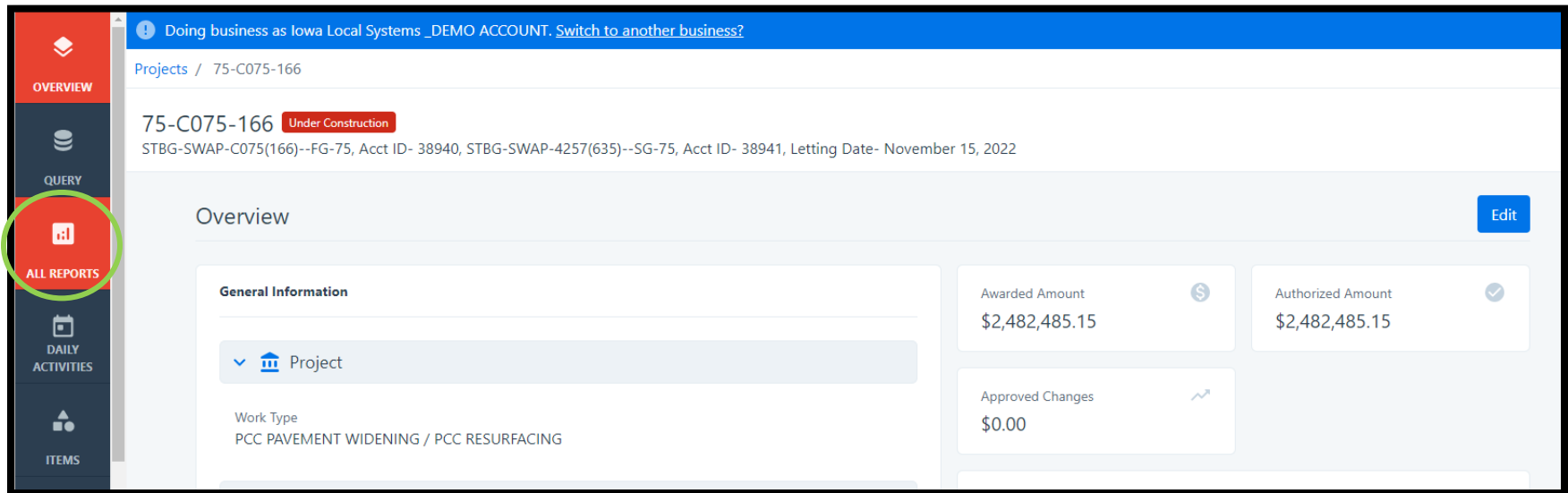


If you want to disable the Doc Express integration, click the gray “Disable Integration” button in the lower, right corner of the Doc Express® Integration box. A pop-up window will appear titled, “Disable Integration”. If you want to disconnect/disable the integration, click on the red “Disable Integration” button. If not, click the gray “Cancel” button.



# 4 - Reports

To access the standard reports, click on the “All Reports” button on the left menu.



The following screen will appear with a listing of the available reports. Reports available at this time are shown in the following list.

- Items by Contractor – Lists items assigned to each contractor.
- Item Material Associations – Displays all materials associated to each bid item in the project.
- Item Overruns – Lists all items with overruns. Locals are encouraged to use this report to review items that exceed \$50,000 overage and therefore require a change order according to [I.M. 6.000, Attachment D](#).
- Item Overruns by Fund Package – List all items associated with each fund package.
- Posted Quantity – Displays quantities posted in daily reports across a range of dates.
- Statement of Quantities – Displays all items with quantities placed in daily reports.
- Unpaid Items – Displays items in daily reports that have not yet been paid.
- Weekly Item Progress – Displays quantities posted in daily reports within 7 days after selected start date.
- Materials – Displays all materials that were added to the project.
- Payment History – Contains all the payments that have been posted to this project.
- Project Status – Displays an overview of the project information.
- Stockpile Status – Displays all stockpiles that were created for this project.
- Time Limits – Lists all of the working day time charges across a range of dates. **This is the equivalent report to Iowa DOT form 830238 “Weekly Report of Working Days”.** This Appia form is used in place of the Iowa DOT form 830238. Follow the directions given in the [“Time Limits”](#) section of this instruction manual to ensure all of the necessary information is included on the report.

Although confusing, not all of the reports are shown in this tab that Appia is capable of producing. For example, payment reports are generated from the Payments tab, and a summary of all item posting entries (quantity and measurement entries) and can be generated from the Items tab. Directions on generating specific useful reports not found in the “All Reports” tab are given in the section of the instructions associated with the type of report in question.

Projects / 75-C075-166 / Reports

**75-C075-166** Under Construction  
STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- Nov...

### All Reports

#### Contractors

**Items by Contractor**  
Lists all the items assigned to each contractor.

#### Items

- Item Material Associations**  
Displays all materials associated to each item in the project.
- Item Overruns**  
Lists all items with overruns.
- Item Overruns by Fund Package**  
Lists all items with overruns by fund package.
- Items by Fund Package**  
Lists all items associated with each fund package.
- Posted Quantity**  
Displays quantities posted in daily reports across a range of dates.
- Statement of Quantities**  
Displays all items with quantities placed in daily reports.

# 5 - Daily Reports and Postings



In Appia, the “Daily Activities” section is where you input the information traditionally entered into a “field book”. This section is where you write the “Daily Reports” concerning the project progress and post quantities completed for bid items each day. To access this section, click on the “Daily Activities” button on the left menu.

The screenshot displays the Appia software interface. At the top, a blue header bar contains the text "Doing business as Iowa Local Systems \_DEMO ACCOUNT. [Switch to another business?](#)". Below this, the breadcrumb "Projects / 75-C075-166" is visible. The main content area shows the project details for "75-C075-166" with a red "Under Construction" tag. The project description includes "STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- November 15, 2022". The "Overview" section is active, showing a "General Information" card with expandable sections for "Project" (Work Type: PCC PAVEMENT WIDENING / PCC RESURFACING) and "Location" (On K 49, from C38 N 1 miles to 231 ft. north of 200th St.; In the city of Le Mars, on K49 from 18th). To the right, there are summary cards for "Awarded Amount" (\$2,482,485.15), "Authorized Amount" (\$2,482,485.15), and "Approved Changes" (\$0.00). A "Description" card at the bottom right repeats the project details. On the left sidebar, the "DAILY ACTIVITIES" button is highlighted with a red circle.

You will be brought to a screen showing a calendar. Click into the calendar to select the day for which you want to make an entry. If needed, you can use the blue arrows on each side of the month and year at the top of the calendar to navigate to a new month or year.

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

Projects / 75-C075-166 / Daily Activities

75-C075-166 Under Construction [Search Daily Activities](#)

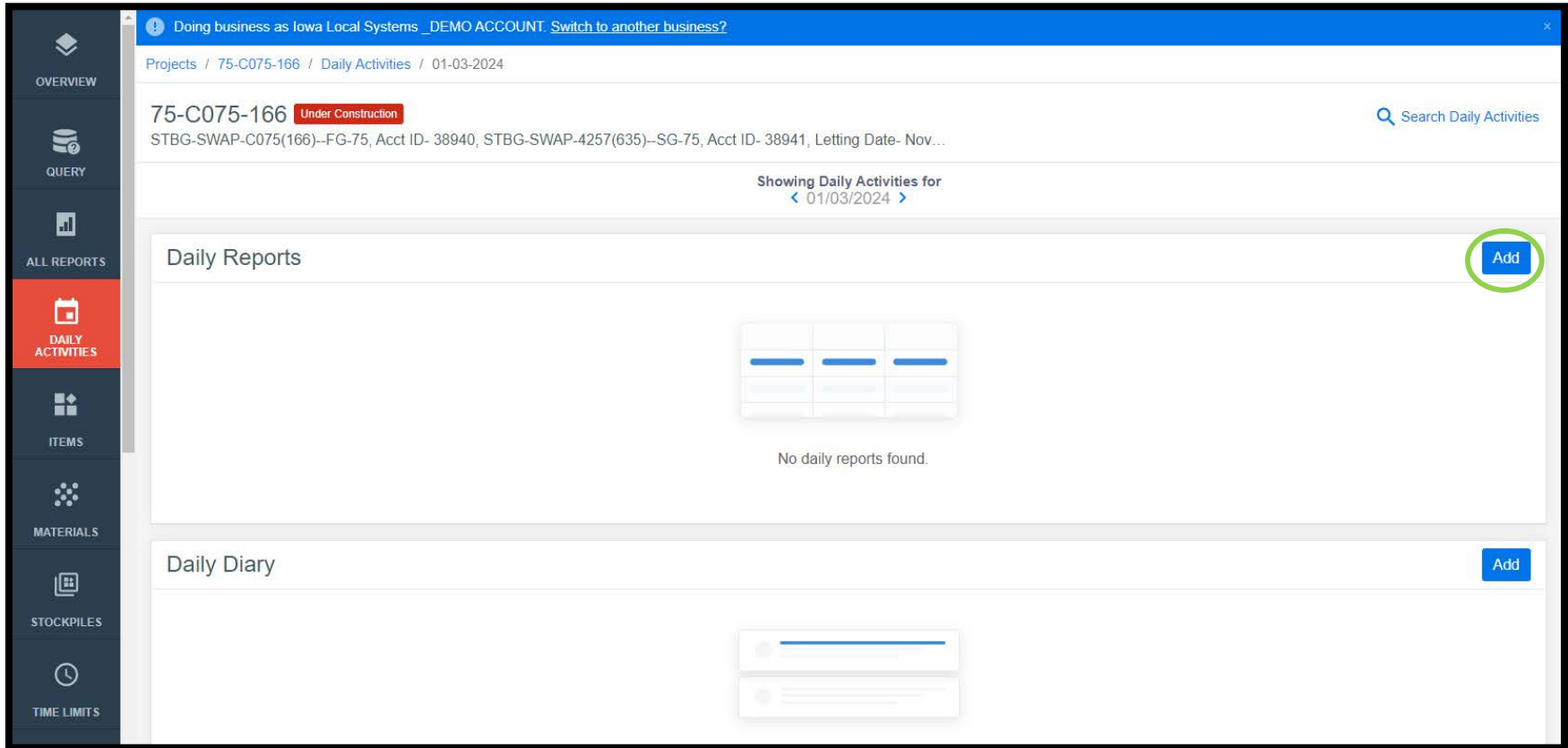
STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- Nov...

< January >  
< 2024 >

| SUN | MON | TUE | WED | THU | FRI | SAT |
|-----|-----|-----|-----|-----|-----|-----|
|     | 1   | 2   | 3   | 4   | 5   | 6   |
| 7   | 8   | 9   | 10  | 11  | 12  | 13  |
| 14  | 15  | 16  | 17  | 18  | 19  | 20  |
| 21  | 22  | 23  | 24  | 25  | 26  | 27  |
| 28  | 29  | 30  | 31  |     |     |     |

Note: Daily activities entries are not allowed before the “Notice to Proceed” date which was entered when the project was “Advanced to Construction”. Local Systems recommends recording the “Notice to Proceed” as the date of full contract execution. Also, you cannot make entries for dates in the future.

Once you have selected a date, the following screen will appear. Click the blue “Add” button in the upper, right corner of the box to add a new Daily Report.



**Local Systems recommends that all locals use the “Daily Reports” option to enter daily information rather than the “Daily Diary”.** Daily Reports are most like the conventional field book. They allow each inspector to write their own entry for project progress and provide a place to add item/quantity postings. In Appia, the Daily Diary option is used on a project manager level to summarize individual daily reports. It does not provide a place to enter item/quantity postings. If you are familiar with the program and want to use Daily Dairies in addition to Daily Reports, that is fine.

Note: Multiple inspectors may enter reports. However, each inspector may only enter one daily report per day.

Clicking to add a daily report will bring up the screen shown below. Notice there are 5 tabs across the top of the page. We will walk through each section.

## A. Overview Tab

The Overview tab opens first. In this tab, there are multiple sections.

- Weather – Record an entry for the weather such as “raining in morning”, “sunny”, etc.
- Temperature – Record the low and high temperatures for the day.
- Weather Day toggle – Click to toggle this back and forth between “No” and “Yes”. Mark “Yes” if it was a bad weather day. **This weather day toggle is only informational. It does NOT connect to or transmit any information to the Time Limits section or the working day count.**
- Remarks – Record any pertinent information about any site activity, project progress or delay, or other information. This is equivalent to the “diary” entry in a traditional field book.
- Custom Fields – Each agency can set up custom fields of their own choosing to be shown on this Overview screen. Custom fields will also be recorded and shown on Daily Report exports. Local Systems recommends setting up custom fields for “Controlling Item of Work” and “Bid Items Affected”. These are easy places to record what bid items were important or had action on any given day.
  - In order to set up custom fields, follow the directions in the “Reference Data: Lists > Editing Lists” section of the [“Appia Project Creation & Account Management Instructions”](#) found on the [Doc Express and Appia](#) webpage on the Local Systems website.

Click the blue “Save” button in the upper, right corner when entries on this page are complete.

Here is an example of the Overview screen populated with information.

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

OVERVIEW PERSONNEL EQUIPMENT ITEM POSTINGS ATTACHMENTS

**Edit** Save Cancel

**Report Date**  
06/05/2019

**Prime Contractor**  
PETERSON CONTRACTORS INC.

**Created By**  
Nicole Stinn

**Report Status**  
Draft

**Weather**  
Sunny

**Temperature**  
Low: 75 High: 80

**Weather Day**  
 NO

**Remarks**

14px **B I U** [align icons] [list icons] **A**

At 7:30am PCI continued to drive the piling for the south abutment. Piles 3 through 9 reached at least 48.0 tons of bearing that was needed. At 3:00pm PCI retapped piles 1 and 2. Pile 1 retapped at 2" with a 7' hammer drop. The 2nd piling retapped had a hammer drop of 7" and in 10 blows achieved 2". This means that both piles that were retapped passed.

The bentonite showed up at the site and PCI unloaded it and placed it into hole #5 of the north abutment. They then added water to the bentonite so that it would firm up. Later in the afternoon the rest of the holes were filled with bentonite and water pumped onto it.

GreenTech showed up to the site at 9:00am and dropped off some of their equipment. They did get most of the disturbed area cultivated with the exceptions of a couple ditch bottoms due to standing water or too muddy to get equipment in there.

**Controlling Item of Work**

14px **B I U** [align icons] [list icons] **A**

Piles, Steel, HP 10x57

**Bid Items Affected**

14px **B I U** [align icons] [list icons] **A**

- Native Grass Seeding
- Wetland Grass Seeding
- Seeding and Fertilizing (Rural)
- Stabilizing Crop - Seeding and Fertilizing
- Reinforcing Steel

Help

## B. Personnel Tab

The second tab in the Daily Activities menu is Personnel. To navigate to the Personnel tab, you can click on either the tab name near the top of the screen or in the listing, depending on which view Appia is currently showing.

The location of the top tab is shown in the view below.

The screenshot displays the Appia software interface for a project. At the top, a green notification bar states "The daily report has been saved successfully." Below this, the breadcrumb trail reads "Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 12-19-2018 / Daily Report / Edit". The main header shows the project name "BROS-C086(60)--8J-86 - 31961" with a red "Under Construction" tag, and the location "Gladbrook Bridge Replacement Letting Date: October 21, 2014". A horizontal navigation bar contains tabs: "OVERVIEW", "PERSONNEL" (highlighted with a green circle), "EQUIPMENT", "ITEM POSTINGS", and "ATTACHMENTS". The "Edit" form includes fields for "Report Date" (12/19/2018), "Prime Contractor" (PETERSON CONTRACTORS INC.), "Created By" (Nicole Stinn), and "Report Status" (Draft). There are also input fields for "Weather", "Temperature" (Low and High), and a "Weather Day" toggle set to "NO". Below the form are two rich text editors for "Remarks" and "Bid Items Affected", both with a 14px font size and standard text formatting tools. A "Save" button and "Cancel" button are located in the top right of the form area. A "Help" button is in the bottom right corner. The left sidebar contains navigation icons for OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES (highlighted in red), ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS, and PUNCH LIST.

The location of the tab in the vertical list is shown in this view.

**LABS**  
BROS-C086(60)--8J-86 - 31961 Under Construction  
Gladbrook Bridge Replacement Letting Date: October 21, 2014

**Submit For Approval** **Actions** **Reports**

### Daily Report Edit

|  |  |
|--|--|
| <b>Report Date</b><br>12/22/2018                             | <b>Report Status</b><br>Draft            |
| <b>Prime Contractor</b><br>PETERSON CONTRACTORS INC.         | <b>Weather Day?</b><br>No                |
| <b>Weather</b><br>Cloudy, Drizzle                            | <b>Temperature</b><br>Low: 30° High: 39° |
| <b>Created By</b><br>Nicole Stinn on 12/09/2020 02:38 PM EST |  |

**Remarks**  
Today, Niki (Asst. Engineer) and I went to Gladbrook and spoke with Steve (PCI foreman). We wanted to make sure all the survey stakes were in place and see if Steve had any questions. The stakes were placed and the PCI crew had started clearing trees. No other questions or concerns were brought up at this time.

**Controlling Item of Work**  
Clearing and Grubbing

### Personnel Edit

1 No personnel found.

### Equipment Edit

1 No equipment found.

### Item Postings Edit

1 No items found.

**LABS**  
QUERY  
ALL REPORTS  
**DAILY ACTIVITIES**  
ITEMS  
MATERIALS  
STOCKPILES  
TIME LIMITS  
CHANGE ORDERS  
PUNCH LIST  
PAYMENTS

In order to edit the personnel information, click on either the Personnel tab at the top or on the “Edit” button on the right side of the Personnel line as shown in the screenshots above. Either click will bring you to the following screen. This screen will contain generic names for the worker type and crew number and will list “0” entries for the number of type of workers present and cumulative hours worked by that type of worker. You can replace the generic entries with names and types specific to your project. To add additional crews or additional types of workers, click the gray “Add Crew” or “Add Worker Type” buttons, respectively on the right side of the screen. When you have finished entering information, click the blue “Save” button on the right side of the screen.

Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 12-22-2018 / Daily Report / Personnel

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

OVERVIEW PERSONNEL EQUIPMENT ITEM POSTINGS ATTACHMENTS

Personnel

Worker Crew

Crew #1

Contractor  
PETERSON CONTRACTORS INC.

Number Hours  
0 0.00

Worker Type #1

Save Add Crew Add Worker Type Cancel

You may enter specific information for as many of the fields as desired. The view below shows an example with multiple crews and workers.

OVERVIEW PERSONNEL EQUIPMENT ITEM POSTINGS ATTACHMENTS

Personnel

Save Add Crew Add Worker Type Cancel

Worker Crew

Excavation Crew Structure Crew

Contractor  
PETERSON CONTRACTORS INC. PETERSON CONTRACTORS INC.

Number Hours Number Hours  
3 30.00 1 10.00

Number Hours Number Hours  
2 20.00 1 10.00

Number Hours Number Hours  
1 10.00 0 0.00

Worker Type #3



Once the personnel information has been entered and the save button has been clicked, you will be brought back to the main daily activity screen, which should now show the personnel information you just entered.

Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 12-22-2018 / Daily Report

BROS-C086(60)--8J-86 - 31961 Under Construction [Submit For Approval](#) [Actions](#) [Reports](#)

### Daily Report [Edit](#)

**Report Date**  
12/22/2018

**Report Status**  
Draft

**Prime Contractor**  
PETERSON CONTRACTORS INC.

**Weather Day?**  
No

**Weather**  
Cloudy, Drizzle

**Temperature**  
Low: 30° High: 39°

**Created By**  
Nicole Stinn on 12/09/2020 02:38 PM EST

**Remarks**  
Today, Niki (Asst. Engineer) and I went to Gladbrook and spoke with Steve (PCI foreman). We wanted to make sure all the survey stakes were in place and see if Steve had any questions. The stakes were placed and the PCI crew had started clearing trees. No other questions or concerns were brought up at this time.

**Controlling Item of Work**  
Clearing and Grubbing

### Personnel [Edit](#)

|   |             |
|---|-------------|
| Excavation Crew – PETERSON CONTRACTORS INC. |             |
| Laborer <span>2</span>                      | 30.00 hours |
| Equipment Operator <span>2</span>           | 20.00 hours |
| Worker Type #3 <span>1</span>               | 10.00 hours |
| Structure Crew – PETERSON CONTRACTORS INC.  |             |
| Laborer <span>1</span>                      | 10.00 hours |
| Equipment Operator <span>1</span>           | 10.00 hours |

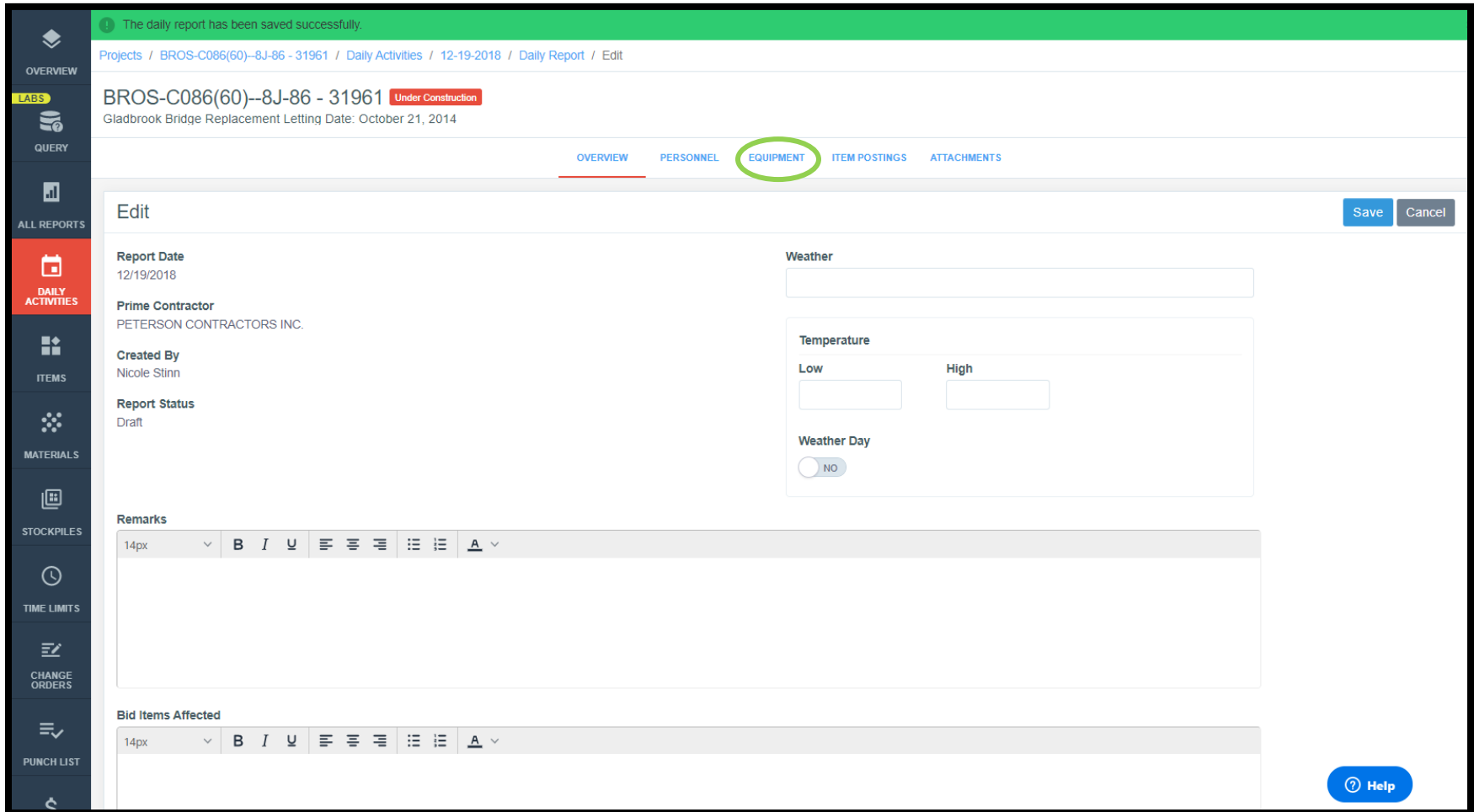
Displaying all 2 crews

### Equipment [Help](#) [Edit](#)

### C. Equipment Tab

The third tab in the Daily Activities menu is Equipment. To navigate to the Equipment tab, you can click on either the tab name near the top of the screen or in the listing, depending on which view Appia is currently showing.

The location of the top tab is shown in the view below.



The location of the tab in the vertical list is shown in this view.

**LABS**  
BROS-C086(60)--8J-86 - 31961 Under Construction  
Gladbrook Bridge Replacement Letting Date: October 21, 2014

**Submit For Approval** **Actions** **Reports**

### Daily Report Edit

|  |  |
|--|--|
| <b>Report Date</b><br>12/22/2018   | <b>Report Status</b><br>Draft            |
| <b>Prime Contractor</b><br>PETERSON CONTRACTORS INC.   | <b>Weather Day?</b><br>No                |
| <b>Weather</b><br>Cloudy, Drizzle  | <b>Temperature</b><br>Low: 30° High: 39° |
| <b>Created By</b><br>Nicole Stinn on 12/09/2020 02:38 PM EST   |  |
| <b>Remarks</b><br>Today, Niki (Asst. Engineer) and I went to Gladbrook and spoke with Steve (PCI foreman). We wanted to make sure all the survey stakes were in place and see if Steve had any questions. The stakes were placed and the PCI crew had started clearing trees. No other questions or concerns were brought up at this time. |  |
| <b>Controlling Item of Work</b><br>Clearing and Grubbing   |  |

### Personnel Edit

1 No personnel found.

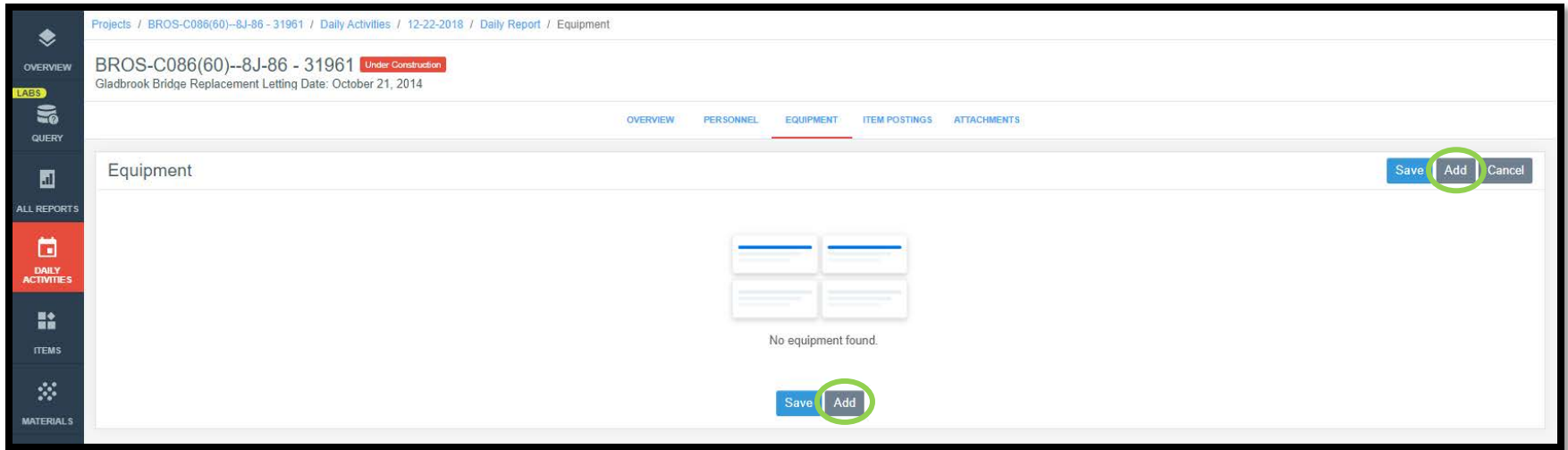
### Equipment Edit

1 No equipment found.

### Item Postings Edit

1 No items found.

In order to edit the equipment information, click on either the Equipment tab at the top or on the “Edit” button on the right side of the Equipment line as shown in the screenshots above. Either click will bring you to the following screen. To add equipment information, click on the gray “Add” button on either the right side or bottom of the screen.



You may enter specific information for as many of the fields as desired. The view below shows an example with project information entered. Additional pieces of equipment can be added by clicking the gray “Add” button. When you have finished entering information, click the blue “Save” button on both the right side and bottom of the screen.

The screenshot displays the 'Equipment' management interface. At the top, there are navigation tabs: OVERVIEW, PERSONNEL, EQUIPMENT (selected), ITEM POSTINGS, and ATTACHMENTS. A green notification bar at the top states 'The equipment has been saved successfully.' The interface shows two equipment entries, each with the following fields:

- Description:** Bulldozer (top entry) and Excavator (bottom entry)
- Contractor:** PETERSON CONTRACTORS INC.
- Active Count:** 1
- Active Hours:** 8.00
- Idle Count:** 1
- Idle Hours:** 2.00
- Comments:** Bulldozer pushing downed trees to pile for disposal. (top entry) and Excavation grabbing downed trees and moving where they can be pushed by bulldozer. (bottom entry)

At the top right, there are buttons for 'Save' (blue), 'Add' (gray), and 'Cancel' (gray). At the bottom center, there are buttons for 'Save' (blue) and 'Add' (gray). The 'Save' buttons are circled in blue, and the 'Add' buttons are circled in gray.

Once the equipment information has been entered and the save button has been clicked, you will be brought back to the main daily activity screen, which should now show the equipment information you just entered.

The screenshot displays a software interface for daily activity management. On the left is a dark sidebar with navigation icons for MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS, PUNCH LIST, PAYMENTS, CONTRACTORS, FUNDING, and MORE. The main content area is white and contains the following sections:

- Text:** "Today, Niki (Asst. Engineer) and I went to Gladbrook and spoke with Steve (PCI foreman). We wanted to make sure all the survey stakes were in place and see if Steve had any questions. The stakes were placed and the PCI crew had started clearing trees. No other questions or concerns were brought up at this time."
- Controlling Item of Work:** Clearing and Grubbing
- Personnel:** Includes two crew entries for "Excavation Crew" and "Structure Crew" from "PETERSON CONTRACTORS INC.", listing roles like Laborer and Equipment Operator with their respective hours.
- Equipment:** A table with columns for Description, Active, Idle, Comments, and Contractor. It lists a Bulldozer and an Excavator, both with 8.00 hours active and 2.00 hours idle. A green oval highlights this section.
- Item Postings:** A blue bar indicating "No items found."
- Attachments:** A blue bar indicating "No attachments found."

## D. Item Postings Tab

The fourth tab in the Daily Activities menu is Item Postings. Item postings are entries made for quantity progress on bid items. (Some users will have used DOT-provided “E-sheets” in Excel for the purpose of quantity entries and measurements in the past. This tab is where that information should be entered.)

To navigate to the Item Postings tab, you can click on either the tab name near the top of the screen or in the listing, depending on which view Appia is currently showing.

The location of the top tab is shown in the view below.

The screenshot displays the Appia software interface. At the top, a green notification bar states "The daily report has been saved successfully." Below this, the breadcrumb trail reads "Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 12-19-2018 / Daily Report / Edit". The main header shows the project name "BROS-C086(60)--8J-86 - 31961" with a red "Under Construction" tag and the location "Gladbrook Bridge Replacement Letting Date: October 21, 2014". A navigation bar contains tabs for "OVERVIEW", "PERSONNEL", "EQUIPMENT", "ITEM POSTINGS" (highlighted with a green circle), and "ATTACHMENTS". The "Edit" form includes fields for "Report Date" (12/19/2018), "Prime Contractor" (PETERSON CONTRACTORS INC.), "Created By" (Nicole Stinn), and "Report Status" (Draft). There are also input fields for "Weather", "Temperature" (Low and High), and a "Weather Day" toggle set to "NO". A rich text editor for "Remarks" and another for "Bid Items Affected" are visible at the bottom.

The location of the tab in the vertical list is shown in this view.

**LABS**  
BROS-C086(60)--8J-86 - 31961 Under Construction  
Gladbrook Bridge Replacement Letting Date: October 21, 2014

[Submit For Approval](#) [Actions](#) [Reports](#)

### Daily Report Edit

|  |  |
|--|--|
| <b>Report Date</b><br>12/22/2018   | <b>Report Status</b><br>Draft            |
| <b>Prime Contractor</b><br>PETERSON CONTRACTORS INC.   | <b>Weather Day?</b><br>No                |
| <b>Weather</b><br>Cloudy, Drizzle  | <b>Temperature</b><br>Low: 30° High: 39° |
| <b>Created By</b><br>Nicole Stinn on 12/09/2020 02:38 PM EST   |  |
| <b>Remarks</b><br>Today, Niki (Asst. Engineer) and I went to Gladbrook and spoke with Steve (PCI foreman). We wanted to make sure all the survey stakes were in place and see if Steve had any questions. The stakes were placed and the PCI crew had started clearing trees. No other questions or concerns were brought up at this time. |  |
| <b>Controlling Item of Work</b><br>Clearing and Grubbing   |  |

### Personnel Edit

1 No personnel found.

### Equipment Edit

1 No equipment found.

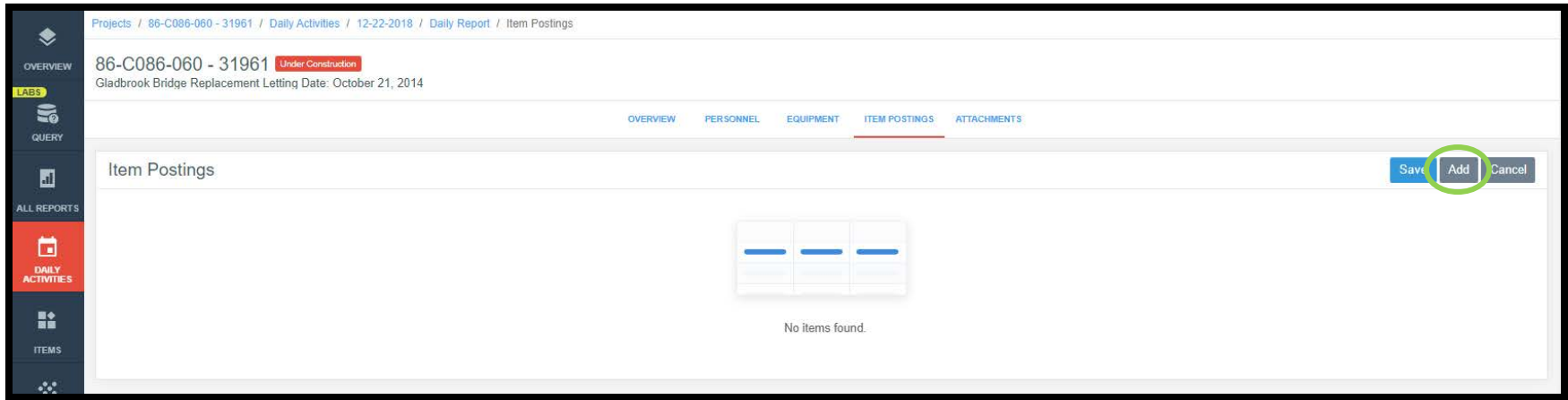
### Item Postings Edit

1 No items found.

**Vertical List:** LABS, QUERY, ALL REPORTS, **DAILY ACTIVITIES**, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS, PUNCH LIST, PAYMENTS



In order to edit the item posting (quantity posting) information, click on either the Item Posting tab at the top or on the “Edit” button on the right side of the Item Posting line as shown in the screenshots above. Either click will bring you to the following screen. To add item posting information, click on the gray “Add” button on the right side of the screen.



Clicking “Add” will cause a box to pop up containing all of the items on the contract. To add an entry for a particular item, simply click on the item. Clicking once will cause a “1” to appear in the green box on the left side of the item’s line. Clicking the item again will change the number to “2”. This number indicates the number of line entries that need to be added for a specific item. For example, if an item has associated work completed at two different locations, you would want to click twice to be able to add two quantity measurements to the report record. If you accidentally click on an item or click on an item too many times and have more entries than needed, simply click the red circle with the “x” on the right side of the line to remove the entry.

### Add Project Items

Search

|   |      |              |   |      |            |       |            |   |
|---|------|--------------|---|------|------------|-------|------------|---|
| <span style="background-color: #008000; color: white; border-radius: 50%; padding: 2px 5px;">0</span> | 0170 | 2507-3250005 | ENGINEERING FABRIC                      | SY   | 2,805.000  | 0.000 | 2,805.000  | <span style="color: red; font-weight: bold;">x</span> |
| <span style="background-color: #008000; color: white; border-radius: 50%; padding: 2px 5px;">0</span> | 0180 | 2507-6800061 | REVTMENT, CLASS E                       | TON  | 2,180.000  | 0.000 | 2,180.000  | <span style="color: red; font-weight: bold;">x</span> |
| <span style="background-color: #008000; color: white; border-radius: 50%; padding: 2px 5px;">1</span> | 0190 | 2533-4980005 | MOBILIZATION                            | LS   | 1.000      | 0.000 | 1.000      | <span style="color: red; font-weight: bold;">x</span> |
| <span style="background-color: #008000; color: white; border-radius: 50%; padding: 2px 5px;">0</span> | 0200 | 2536-6745045 | RMVL OF ASBESTOS                        | LS   | 1.000      | 0.000 | 1.000      | <span style="color: red; font-weight: bold;">x</span> |
| <b>Section: 2 - ROADWAY ITEMS</b>   |      |              |   |      |            |       |            |   |
| <span style="background-color: #008000; color: white; border-radius: 50%; padding: 2px 5px;">2</span> | 0210 | 2101-0850001 | CLEAR+GRUBB                             | ACRE | 2.700      | 0.000 | 2.700      | <span style="color: red; font-weight: bold;">x</span> |
| <span style="background-color: #008000; color: white; border-radius: 50%; padding: 2px 5px;">0</span> | 0220 | 2102-2625001 | EMBANKMENT-IN-PLACE, CONTRACTOR FURNISH | CY   | 36,540.000 | 0.000 | 36,540.000 | <span style="color: red; font-weight: bold;">x</span> |
| <span style="background-color: #008000; color: white; border-radius: 50%; padding: 2px 5px;">0</span> | 0230 | 2102-2710070 | EXCAVATION, CL 10, RDWY+BORROW          | CY   | 24,950.000 | 0.000 | 24,950.000 | <span style="color: red; font-weight: bold;">x</span> |
| <span style="background-color: #008000; color: white; border-radius: 50%; padding: 2px 5px;">0</span> | 0240 | 2105-8425015 | TOPSOIL, STRIP, SALVAGE+SPREAD          | CY   | 5,920.000  | 0.000 | 5,920.000  | <span style="color: red; font-weight: bold;">x</span> |
| <span style="background-color: #008000; color: white; border-radius: 50%; padding: 2px 5px;">0</span> | 0250 | 2115-0100000 | MODIFIED SUBBASE                        | CY   | 75.000     | 0.000 | 75.000     | <span style="color: red; font-weight: bold;">x</span> |

3 Item(s)

Add Items
Cancel

If you don’t see the item you are looking for, you can search for it in the search bar at the top of the box. Also, the item could be on the next page. If you scroll through the items to get to the bottom of the box, an option for going to the next page will appear. When finished selecting

items for entry, click on the “Add Items” button in the bottom, right corner. Items added by change order will only be visible and available for selection if the change order is in pending or approved status.

**Add Project Items**

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

|   |      |              |   |      |            |       |            |   |
|---|------|--------------|---|------|------------|-------|------------|---|
| 0 | 0230 | 2102-2710070 | EXCAVATION, CL 10, RDWY+ ROW                      | CY   | 24,950.000 | 0.000 | 24,950.000 | ✕ |
| 0 | 0240 | 2105-8425015 | TOPSOIL, STRIP, SALVAGE+SPREAD                    | CY   | 5,920.000  | 0.000 | 5,920.000  | ✕ |
| 0 | 0250 | 2115-0100000 | MODIFIED SUBBASE                                  | CY   | 75.000     | 0.000 | 75.000     | ✕ |
| 0 | 0260 | 2123-7450000 | SHLD CONSTRUCTION, EARTH                          | STA  | 14.000     | 0.000 | 14.000     | ✕ |
| 0 | 0270 | 2312-8260051 | GRANULAR SURFACING ON ROAD, CLASS A CRUSHED STONE | TON  | 1,200.000  | 0.000 | 1,200.000  | ✕ |
| 0 | 0280 | 2402-2720100 | EXCAVATION, CL 20, RDWY PIPE CULV                 | CY   | 590.000    | 0.000 | 590.000    | ✕ |
| 0 | 0290 | 2416-0100036 | APRONS, CONCRETE, 36 IN. DIA.                     | EACH | 2.000      | 0.000 | 2.000      | ✕ |
| 0 | 0300 | 2416-1180036 | CULVERT, CONCRETE ROADWAY PIPE, 36 IN. DIA.       | LF   | 90.000     | 0.000 | 90.000     | ✕ |

1 2 Next > Last »

Displaying items 1 - 30 of 60 in total

3 Item(s) Add Items Cancel

After clicking “Add Items” in the item selection box as shown above, the following screen will appear where you can enter measurements, location information, quantities, and other remarks. In order to enter all of the information, make sure to click on the “view more” box shown below the line item.

Projects / 75-C075-166 / Daily Activities / 01-03-2024 / Daily Report / Item Postings

**75-C075-166** Under Construction  
 STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- Nov...

OVERVIEW PERSONNEL EQUIPMENT **ITEM POSTINGS** ATTACHMENTS

Item Postings Import FieldGenius® Save Add Cancel

|  |                  |                    |   |                                    |  |
|--|------------------|--------------------|---|------------------------------------|--|
| <b>0020: 2102-2710070</b> <span style="color: red;">CY</span><br>EXCAVATION, CLASS 10, ROADWAY AND BORROW <span style="float: right;">✕</span>     |                  |                    |   |                                    |  |
| Authorized Quantity  | Pending Quantity | Remaining Quantity | Quantity Placed<br><small>Use Worksheet</small> | Total Placed                       |  |
| 620.000  | 0.000            | 620.000            | 0.000   | 0.000                              |  |
| <a href="#">view more</a>  |                  |                    |   |                                    |  |
| <b>0120: 2303-1258283</b> <span style="color: red;">TON</span><br>ASPHALT BINDER, PG 58-28S, STANDARD TRAFFIC <span style="float: right;">✕</span> |                  |                    |   |                                    |  |
| Authorized Quantity  | Pending Quantity | Remaining Quantity | Quantity Placed                                 | Total Placed                       |  |
| 23.000   | 0.000            | 23.000             | <input type="text" value="0.000"/>              | <input type="text" value="0.000"/> |  |
| <a href="#">view more</a>  |                  |                    |   |                                    |  |
| <b>0030: 2105-8425015</b> <span style="color: red;">CY</span><br>TOPSOIL, STRIP, SALVAGE AND SPREAD <span style="float: right;">✕</span>           |                  |                    |   |                                    |  |
| Authorized Quantity  | Pending Quantity | Remaining Quantity | Quantity Placed<br><small>Use Worksheet</small> | Total Placed                       |  |
| 2,200.000  | 0.000            | 2,200.000          | 0.000   | 0.000                              |  |
| <a href="#">view more</a>  |                  |                    |   |                                    |  |
| <b>0690: 2533-4980005</b> <span style="color: red;">LS</span><br>MOBILIZATION <span style="float: right;">✕</span>                                 |                  |                    |   |                                    |  |
| Authorized Quantity  | Pending Quantity | Remaining Quantity | Quantity Placed                                 | Total Placed                       |  |

Clicking on the “view more” box will cause the item line to expand to show additional fields for data entry.

The screenshot displays the 'Item Postings' interface. On the left is a navigation sidebar with icons for Overview, Query, All Reports, Daily Activities, Items, Materials, Stockpiles, Time Limits, and Change. The main area shows a table of items with columns for Authorized Quantity, Pending Quantity, Remaining Quantity, Quantity Placed, and Total Placed. Item 0120 is expanded, showing a 'view more' button and additional data entry fields: Contractor (GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.), Remarks, Location, Station From, Station To, Offset Distance, and Offset Direction. A green oval highlights the expanded data entry section.

| Item ID            | Description                                 | Authorized Quantity | Pending Quantity | Remaining Quantity | Quantity Placed | Total Placed |
|--------------------|---|---------------------|------------------|--------------------|-----------------|--------------|
| 0020: 2102-2710070 | EXCAVATION, CLASS 10, ROADWAY AND BORROW    | 620.000             | 0.000            | 620.000            | 0.000           | 0.000        |
| 0120: 2303-1258283 | ASPHALT BINDER, PG 58-28S, STANDARD TRAFFIC | 23.000              | 0.000            | 23.000             | 0.000           | 0.000        |
| 0030: 2105-8425015 | TOPSOIL, STRIP, SALVAGE AND SPREAD          |                     |                  |                    |                 |              |

When a project has been set up with “yes” checked for using worksheets (see the construction settings), a blue calculator with “Use Worksheet” will show under the “Quantity Placed” column. If worksheets are being used, you must click on this calculator to enter measurements for quantity calculation. If there is no worksheet associated with the item, you can enter the quantity directly into the box.

The screenshot displays the 'Item Postings' section for project 75-C075-166. The interface includes a sidebar with navigation options like OVERVIEW, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, and TIME LIMITS. The main content area shows a list of items with the following data:

| Item ID   | Authorized Quantity | Pending Quantity | Remaining Quantity | Quantity Placed | Total Placed |
|---|---------------------|------------------|--------------------|-----------------|--------------|
| 0020: 2102-2710070 (CY)<br>EXCAVATION, CLASS 10, ROADWAY AND BORROW     | 620.000             | 0.000            | 620.000            | Use Worksheet   | 0.000        |
| 0120: 2303-1258283 (TON)<br>ASPHALT BINDER, PG 58-28S, STANDARD TRAFFIC | 23.000              | 0.000            | 23.000             | 0.000           | 0.000        |
| 0030: 2105-8425015 (CY)<br>TOPSOIL, STRIP, SALVAGE AND SPREAD           | 2,200.000           | 0.000            | 2,200.000          | Use Worksheet   | 0.000        |
| 0690: 2533-4980005 (LS)<br>MOBILIZATION                                 |                     |                  |                    |                 |              |

**Note: Measurements entered into the worksheet will later print on quantity reports. Local Systems staff need these measurements for audit/review purposes. If you override the worksheet calculation or if you have chosen not to use worksheets, you will need to enter all measurement information in the “Remarks” section under the “view more” box or attach any appropriate drawings or files to the daily report.**

Here is an example of a worksheet that is used to calculate an item with Acre units. When using a worksheet, enter the measurements into the fields provided. Click on the gray “Preview” button near the top of the worksheet to have the worksheet calculate what your quantity is. When the entered information is found to be acceptable, click the blue “Use Worksheet” button at the bottom of the worksheet.

The screenshot displays a software interface for managing item postings. The main content area shows a table of item postings with columns for Authorized Quantity, Pending Quantity, Remaining Quantity, and Quantity Placed. The right-hand panel, titled "Area: Acre", contains a "Preview" button, a "CALCULATED RESULT" of 1.033 (with the formula length \* width / 43560), and input fields for "Length (FT)" (450.000) and "Width (FT)" (100.000). At the bottom of the right panel, there are "Use", "Help", and "Cancel" buttons.

**Note:** If you have chosen to use worksheets, but you want to override the worksheet’s calculation (i.e., for an irregular area), you must first use the worksheet to calculate a number. Then, you can manually override the calculated quantity if you wish. If you do override the quantity, you will need to enter all measurement information in the “Remarks” section under the “view more” box or attach any appropriate drawings or files to the daily report.

Note: Measurements entered in a worksheet will display in the Item History Report that Local Systems auditors will need. See the “Exporting Data: Export Reports” section of the [Appia Project Creation & Account Management Instructions](#) for guidance on generating that report.

If the worksheet quantity is overridden, a yellow “Manual” tag will appear on the left side of the line above the bid item name.

The screenshot displays the 'Item Postings' section of a software application. The interface includes a navigation sidebar on the left with options like OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS, PUNCH LIST, and PAYMENTS. The main content area shows a list of item postings for project 86-C086-060 - 31961. The table below summarizes the data shown in the screenshot:

| Item ID            | Description    | Authorized Quantity | Pending Quantity | Remaining Quantity | Quantity Placed | Total Placed |
|--------------------|----------------|---------------------|------------------|--------------------|-----------------|--------------|
| 0190: 2533-4980005 | MOBILIZATION   | 1.000               | 0.000            | 0.750              | 0.250           | 0.250        |
| 0210: 2101-0850001 | CLEAR+GRUBB    | 2.700               | 0.000            | 1.167              | 1.033           | 1.533        |
| 0210: 2101-0850001 | CLEAR+GRUBB    | 2.700               | 0.000            | 1.167              | 0.500           | 1.533        |
| 0380: 2518-6910000 | SAFETY CLOSURE | 4.000               | 0.000            | 3.000              | 1.000           | 1.000        |

**\*\*\*It is of the utmost importance that ALL relevant data for an item posting is entered. This includes test results, all appropriate measurements, location information, and anything else pertinent to the item posting.** In order to enter these details, first make sure the “view more” tab for the item has been clicked and the “Remarks”, “Location”, and “Station” fields are visible. In those fields, enter all of the necessary information. An example is shown below. Hint: You can expand the “Remarks” box by clicking and dragging the small, gray triangle in the bottom, right corner.



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

OVERVIEW PERSONNEL EQUIPMENT **ITEM POSTINGS** REVIEW MATERIALS ATTACHMENTS

### Item Postings

0140: 2501-5478073 LF  
 CONCRETE ENCASEMENT OF STEEL H PILES, HP 14 X 73

| Authorized Quantity | Pending Quantity | Remaining Quantity | Quantity Placed | Total Placed |
|---------------------|------------------|--------------------|-----------------|--------------|
| 396.000             | 0.000            | 306.000            | 90.000          | 90.000       |

[view more](#)

Displaying 1 item posting

[Save](#) [Add](#)

OVERVIEW PERSONNEL EQUIPMENT **ITEM POSTINGS** ATTACHMENTS

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|---------------------|------------------|--------------------|-----------------|--------------|
| 396.000             | 0.000            | 306.000            | 90.000          | 90.000       |

Contractor: PETERSON CONTRACTORS INC.

Remarks:
 

- CY Used = 17 1/4
- Load Number Tested = 1
- Air Test = 6.5%
- Slump Test = 3 1/2"
- Mix = C4WR-C20-S20
- Plant = Manatts (Tama)

Location: South Pier - Piling #s 1-5

Station From: 48 + 34.00

Station To: +

[view less](#)

Displaying 1 item posting

[Save](#) [Add](#)

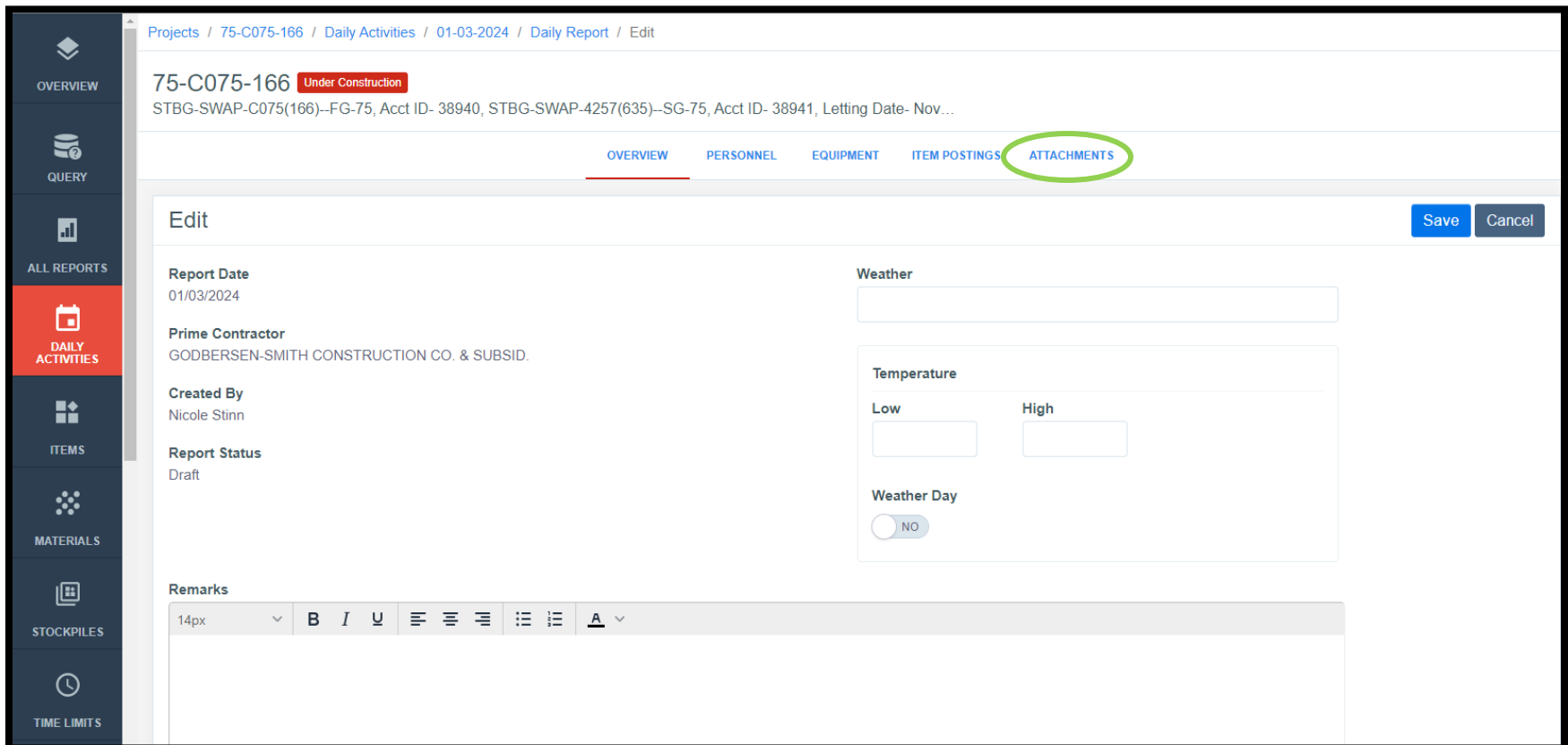
As an alternative to entering test results and other data in the remarks tab, users may use the DOT Excel-based "E-sheets". "E-sheets" must be uploaded to Doc Express for review/audit, but they may also be uploaded as an attachment to the Daily Report.

## E. Attachments Tab

The fifth tab in the Daily Activities menu is Attachments. Appia supports attachments of all file type varieties (videos, documents, pictures, etc.) and sizes. Examples of attachments include but are not limited to videos of work or storm water inspections, survey point files, scanned hand-drawings, Excel quantity sheets (E-sheets), CAD drawings, etc.

To navigate to the Attachments tab, you can click on either the tab name near the top of the screen or in the listing, depending on which view Appia is currently showing.

The location of the top tab is shown in the view below.



The screenshot displays the Appia software interface for editing a daily report. The breadcrumb trail at the top reads: Projects / 75-C075-166 / Daily Activities / 01-03-2024 / Daily Report / Edit. The main header shows the project ID '75-C075-166' with a red 'Under Construction' status tag, followed by the report title 'STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- Nov...'. Below the header is a navigation bar with tabs: OVERVIEW, PERSONNEL, EQUIPMENT, ITEM POSTINGS, and ATTACHMENTS. The 'ATTACHMENTS' tab is highlighted with a green circle. The main content area is titled 'Edit' and includes a 'Save' button and a 'Cancel' button. The form contains several fields: 'Report Date' (01/03/2024), 'Prime Contractor' (GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.), 'Created By' (Nicole Stinn), and 'Report Status' (Draft). There are also fields for 'Weather', 'Temperature' (with 'Low' and 'High' sub-fields), and 'Weather Day' (with a 'NO' toggle). At the bottom, there is a 'Remarks' section with a text editor toolbar showing font size (14px), bold, italic, underline, and other formatting options.

The location of the tab in the vertical list is shown in this view.

75-C075-166 Under Construction Submit For Approval Actions ▾ Reports ▾  
STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- Nov...

### Daily Report Edit

|   |                               |
|---|-------------------------------|
| <b>Report Date</b><br>01/03/2024                                      | <b>Report Status</b><br>Draft |
| <b>Prime Contractor</b><br>GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID. | <b>Weather Day?</b><br>No     |
| <b>Created By</b><br>Nicole Stinn on 01/12/2024 04:35 PM EST          |                               |

### Personnel Edit

! No personnel found. ×

### Equipment Edit

! No equipment found. ×

### Item Postings Edit

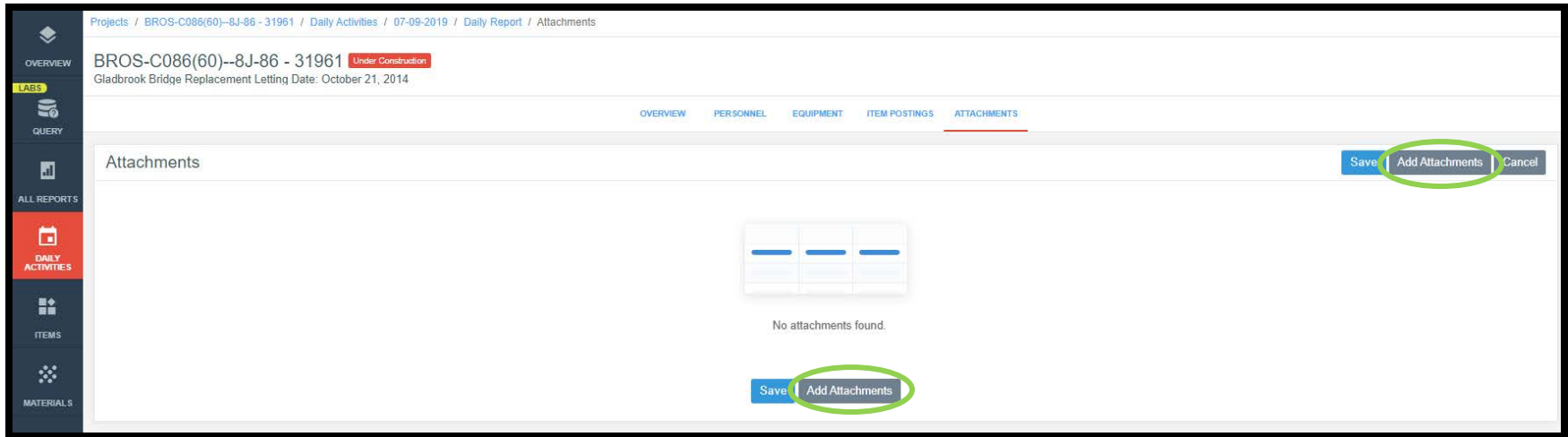
! No items found. ×

### Attachments Edit

! No attachments found. ×

**Sidebar Navigation:** OVERVIEW, QUERY, ALL REPORTS, **DAILY ACTIVITIES**, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS

In order to add attachments, click on either the Attachments tab at the top or on the “Edit” button on the right side of the Attachments line as shown in the screenshots above. Either click will bring you to the following screen. To add an attachment, click on the gray “Add Attachments” button on either the right side or bottom of the screen.

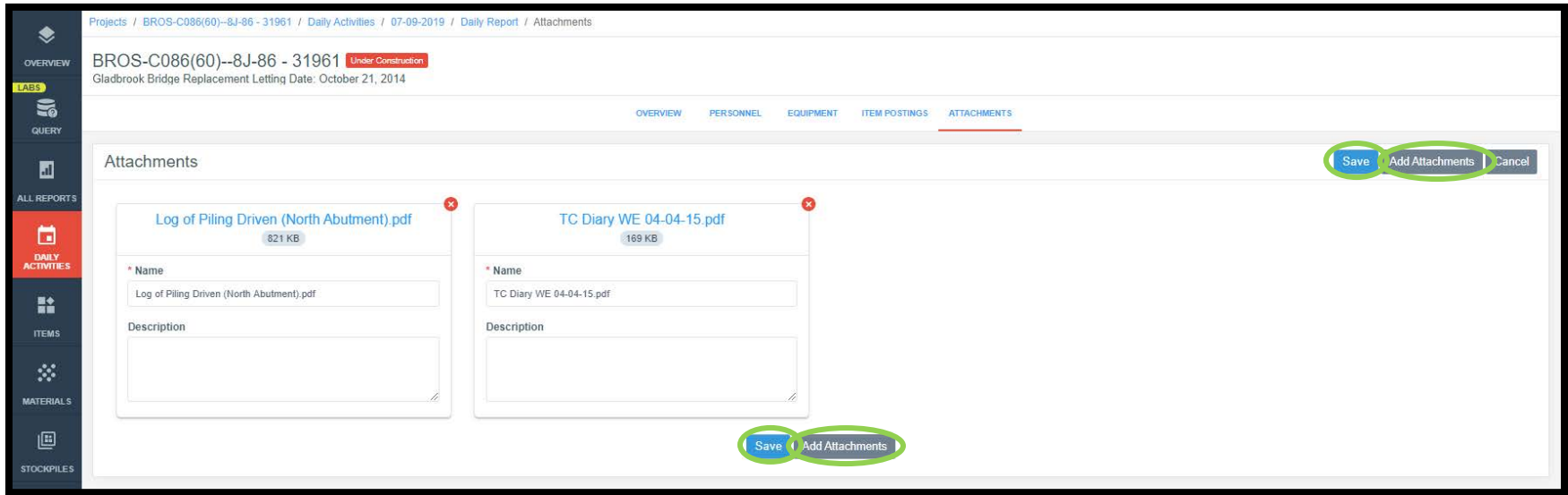


Clicking the “Add Attachments” button will cause the following pop-up box/graphic to appear. To add any desired attachments, either:

- open the file explorer on your computer and navigate to your desired file(s) and drag and drop the file into the box, or
- click on the blue “choose your files” link and then navigate to your desired file(s).



Once an attachment is chosen, the following screen will appear. If you are satisfied with the selected attachments, click the blue “Save” button in either the upper, right corner or at the bottom of the screen. If you wish to add additional attachments, click on the gray “Add Attachments” button.



Selecting “Save” will bring you back to the Overview tab where your attachments will now be listed.



## F. Submitting Daily Reports for Approval & Reviewing Materials

When an inspector is done filling out a Daily Report and has double-checked the accuracy of the entries, the report may be “Submitted for Approval”. To do so, in the open report, click on the blue “Submit for Approval” button in the upper, right corner.

The item posting has been updated successfully.

Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 02-08-2019 / Daily Report

BROS-C086(60)--8J-86 - 31961 Under Construction Submit For Approval Actions Reports

Gladbrook Bridge Replacement Letting Date: October 21, 2014

### Daily Report

Edit

|  |  |
|--|--|
| <b>Report Date</b><br>02/08/2019                             | <b>Report Status</b><br>Draft            |
| <b>Prime Contractor</b><br>PETERSON CONTRACTORS INC.         | <b>Weather Day?</b><br>No                |
| <b>Weather</b><br>Sunny                                      | <b>Temperature</b><br>Low: 26° High: 34° |
| <b>Created By</b><br>Nicole Stinn on 12/31/2020 03:14 PM EST |  |

**Remarks**

Today PCI poured the rest of the south pier encasements. 18 cubic yards of concrete was ordered and 17 3/4 was placed. I tested the 1st truck to the site for air and slump. The air was 6.5% and the slump was 3 1/2". They had a slight problem with encasement 5. The bottom of the encasement started to move which allowed some concrete to flow out of the encasement. Kenny (PCI foreman) got the hole fixed and there was no more concrete flowing out. Other than that the pour went very well. No other concerns or questions came up at that time.

**Controlling Item of Work**

Concrete Encasement of Steel H-Piles, HP 14x73 (P10L Type 3)

### Personnel

Edit

No personnel found.

Depending on the role type set for the user submitting the report, a pop-up box may appear saying “The daily report has materials to be reviewed” when the “Submit for Approval” button is selected. This box is shown here.

The daily report has materials to be reviewed

Review Materials Submit For Approval

There are often multiple materials associated with a given bid item (i.e., materials for a PCC item would include portland cement, fly ash, slag, potable water, aggregate, etc.). **Certifications, or known sources in the case of an approved source requirement, for ALL materials must be in-hand before payment is made for the bid item associated with these materials.** An exception would be cases where certifications are received as part of a plant book at the conclusion of an item's placement. **If the necessary certifications have NOT been obtained, the report should NOT be approved as long as it contains a non-zero quantity posting for non-certified bid items.** If the report is NOT approved, Appia will exclude the item postings in the report from future payments until the report is approved.

If you have multiple item postings (quantity entries) in one Daily Report and have certifications for some items but not for all, you have two options: 1) note the placement of the non-certified items in the Daily Report remarks in the overview tab but do not include them in the items posting, or 2) note the placement of the non-certified items in the Daily Report remarks on the overview tab and place the item in an item posting, but record a 0.00 quantity placed. In either case, the item will need to be re-posted with the appropriate quantity when certifications have been received.

If you are the one in your organization who is responsible for reviewing all materials for the presence of the necessary certifications, you should click the blue "Review Materials" button. If you are not the person responsible for ensuring certifications are in hand, you can choose the "Submit for Approval" button in order to pass the review responsibility to the person who approves the report. The materials **MUST** be reviewed before Appia will allow the report to be approved.

In the future, Local Systems plans to develop the use of Appia's materials functionality more fully so that quantities will have to be entered for each material to indicate amounts certified, but for now, please abide by the directions given below.

When the “Review Materials” choice is selected, a screen will appear showing each of the bid items and their associated materials.

| Item               | Unit | Authorized Quantity | Quantity Placed | Unit Price | Paid Quantity |
|--------------------|------|---------------------|-----------------|------------|---------------|
| 0140: 2501-5478073 | LF   | 396.000             | 90.000          | \$76.100   | 0.000         |

| Material                                  | Usage Rate   | Approved Quantity | Remaining Quantity | Fund Package             | Used Quantity | * Material Quantity |
|---|--------------|-------------------|--------------------|--------------------------|---------------|---------------------|
| READY MIX CONCRETE FOR STRUCTURES         | 0.000 CY/LF  | 0.000             | 0.000              | HBP Federal Aid (Non-FM) | 0.000         | 0.000               |
| STEEL REINFORCEMENT, APPROVED SUPPLIER    | 0.000 LB/LF  | 0.000             | 0.000              | HBP Federal Aid (Non-FM) | 0.000         | 0.000               |
| COARSE AGGREGATE FOR CONCRETE, STRUCTURES | 0.000 TON/LF | 0.000             | 0.000              | HBP Federal Aid (Non-FM) | 0.000         | 0.000               |
| FINE AGGREGATE FOR CONCRETE, STRUCTURES   | 0.000 TON/LF | 0.000             | 0.000              | HBP Federal Aid (Non-FM) | 0.000         | 0.000               |
| FLY ASH                                   | 0.000 TON/LF | 0.000             | 0.000              | HBP Federal Aid (Non-FM) | 0.000         | 0.000               |
| ADMIXTURES, NORMAL WATER REDUCING         | 0.000 GAL/LF | 0.000             | 0.000              | HBP Federal Aid (Non-FM) | 0.000         | 0.000               |
| ADMIXTURES, AIR ENTRAINING                | 0.000 GAL/LF | 0.000             | 0.000              | HBP Federal Aid (Non-FM) | 0.000         | 0.000               |
| WATER FOR CONCRETE AND MORTAR             | 0.000 GAL/LF | 0.000             | 0.000              | HBP Federal Aid (Non-FM) | 0.000         | 0.000               |
| PORTLAND CEMENT                           | 0.000 TON/LF | 0.000             | 0.000              | HBP Federal Aid (Non-FM) | 0.000         | 0.000               |

Usage rate should be 0.000 for all materials.

Leave material quantities as 0.000.

\*\*\*At this time, all materials have a usage rate set to 0.000, which means that you do not need to and **SHOULD NOT** enter quantities for any material in the “Review Materials” screen. Entering quantities for materials WILL result in complications with payments. However, even though Local Systems is not having you enter materials quantities at this time, you **MUST** still review the list of materials for yourself to make sure you have all of the necessary certifications and documents. Do **NOT** change the usage rate of 0.000 or the material quantity unless you are specifically instructed to do so by Local Systems staff.



### G. Entering Item Postings for Items Without Certifications or Without Certified Payrolls

For items which have had work completed but for which certifications or certified payrolls (for Federal-aid projects) have not been received at the time a payment is to be made, it is advised that the quantity placed value in the item posting on the daily report be entered as 0.00. The actual quantity placed that day can be recorded in the remarks for the item (under “view more”) so as to have a record of it on the day that it occurred. Entering item progress this way when certifications or payrolls have not been received by the time a payment voucher is to be processed will allow the daily activity report to be approved so that all other certified items posted that day can be processed as part of a payment without payment being made on a non-certified item.

If the certification or payroll is received after the Daily Report containing the 0.00 quantity item posting has been approved and a payment has been made covering that date, an entry can be made on a later Daily Report with a quantity placed, and remarks can be entered to say that certifications or payrolls were just received, but the actual work was completed on the date corresponding to the 0.00 entry. Then, this report can be approved, and the item will be paid on the next payment.

Alternately, if there is more than one Appia user for your organization, a second user can enter an Item Posting with the actual quantity in a Daily Report on the date the work was performed. This daily report would need to remain un-approved until certifications are received. Once certifications are received, the report can be approved. It will be incorporated into the next payment even if it is prior to the payment dates covered by that payment.

If a payment is not ready to be made, the Daily Report can simply be left in draft status until the certification or payroll is received.

## H. Additional “Daily Activities” Information

If you close out of a Daily Report or want to make changes to a previously entered report, you can always select the date from the calendar and get back to the report. In order to open the report for editing, just click on the blue circle with the pencil in it on the right side of the line.

If you want to see what status your report is in (Draft, Pending, or Approved), you can look in the Status column on the view. Additionally, the calendar view will list the report’s status.

The screenshot displays a software interface for managing daily reports. The top navigation bar shows the project path: Projects / 86-C086-060 - 31961 / Daily Activities / 12-22-2018. Below this, the project details are shown: 86-C086-060 - 31961 (Under Construction) and Gladbrook Bridge Replacement Letting Date: October 21, 2014. The main content area is titled 'Daily Reports' and shows a table with the following data:

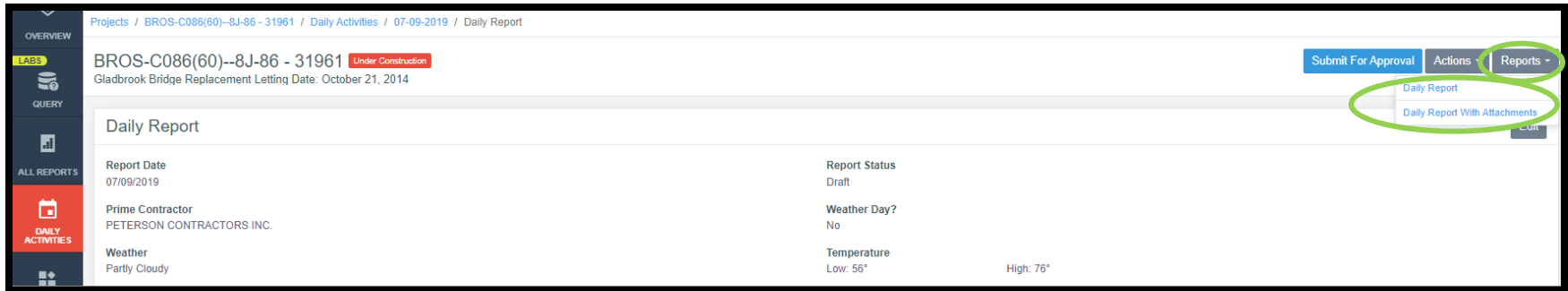
| Inspector    | Status | Remarks   | Actions |
|--------------|--------|---|---------|
| Nicole Stinn | Draft  | Today Niki (Asst. Engineer) and I went to Gladbrook and spoke with Steve (PCI foreman). We wanted to make sure all the survey stakes were in place and ask if Steve had any questions. The stakes were placed and the PCI crew had started clearing trees. No other questions or concerns were brought... |         |

Below the table, it says 'Displaying 1 daily report'. Underneath is a section for 'Daily Diary' which is currently empty, with the message 'No daily diary found.' The interface includes a sidebar on the left with navigation options like OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, and STOCKPILES. A search bar is located in the top right corner.

If you want to use the information from the selected report to start another report rather than re-entering much of the same information (like personnel and equipment), you can click here to make a copy.

To delete a report, click on the red circle with the “x” at the right end of the line. Note: Once a report is approved, it may take a higher-level project role to un-approve and then delete it.

If you would like to generate a PDF of a Daily Report, select the desired report to open it and then click on the gray “Reports” button in the top-right corner of the Daily Report screen and choose either “Daily Report” or “Daily Report With Attachments” (if available) from the drop-down menu.



A PDF will be generated which captures all of the data entered for the report. If the “Daily Report With Attachments” option is selected, any attachments will print along with the report details. An example is shown below. (See the [Attachments Tab](#) section for instructions on adding attachments.)



**Tama County Highway Department**  
**Daily Report**  
 BROS-C086(60)--8J-86 - 31961

**Description** Gladbrook Bridge Replacement  
 Letting Date: October 21, 2014

**Report Date** 02/08/2019

**Prime Contractor** PETERSON CONTRACTORS INC.  
 104 BLACK HAWK  
 REINBECK, IA

**Status** Draft

**Weather** Sunny

**Temperature** 26° to 34°

**Created By** Nicole Stinn on 12/31/2020 03:14 PM EST

**Remarks** Today PCI poured the rest of the south pier encasements. 18 cubic yards of concrete was ordered and 17 3/4 was placed. I tested the 1st truck to the site for air and slump. The air was 6.5% and the slump was 3 1/2". They had a slight problem with encasement 5. The bottom of the encasement started to move which allowed some concrete to flow out of the encasement. Kenny (PCI foreman) got the hole fixed and there was no more concrete flowing out. Other than that the pour went very well. No other concerns or questions came up at that time.

**Controlling Item of Work**  
 Concrete Encasement of Steel H-Piles, HP 14x73 (P10L Type 3)

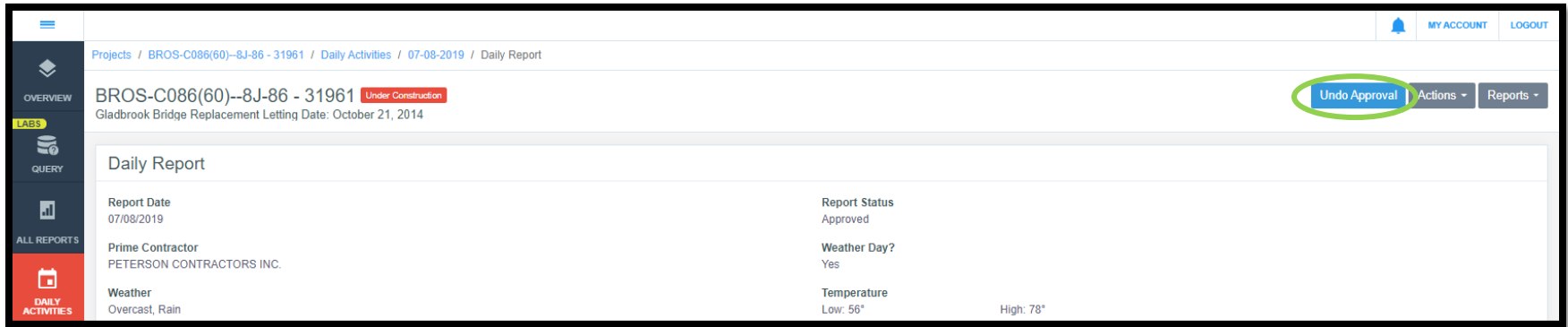
**Item Postings**

| Line Number   | Item ID      | Unit                     | Unit Price           | Quantity Placed                        | Posted Amount |
|---|--------------|--------------------------|----------------------|--|---------------|
| <b>Section: 1 - ITEMS FOR A 244'-0 X 30'-0 PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE</b>  |              |                          |                      |  |               |
| 0140  | 2501-5478073 | LF                       | \$76.100             | 90.000                                 | \$6,849.00    |
| CONCRETE ENCASEMENT OF STEEL H PILES, HP 14 X 73  |              |                          |                      |  |               |
| <b>Contractor:</b> PETERSON CONTRACTORS INC.  |              |                          |                      |  |               |
| <b>Location:</b> South Pier - Piling #s 1-5<br>Station From: 48+34  |              |                          |                      |  |               |
| <b>Remarks:</b> CY Used = 17 1/4 Load Number Tested = 1 Air Test = 6.5% Slump Test = 3 1/2" Mix = C4WR-C20-S20 Plant = Manatts (Tama) |              |                          |                      |  |               |
| <b>Funding Details</b>  |              |                          |                      |  |               |
| <b>HBP Federal Aid (Non-FM)</b>   |              |                          |                      | 90.000                                 | \$6,849.00    |
| <b>Material</b>   | <b>Unit</b>  | <b>Fund Package</b>      | <b>Quantity Used</b> |  |               |
| ADMIXTURES, AIR ENTRAINING  | GAL          | HBP Federal Aid (Non-FM) | 0.000                |  |               |
| ADMIXTURES, NORMAL WATER REDUCING   | GAL          | HBP Federal Aid (Non-FM) | 0.000                |  |               |
| COARSE AGGREGATE FOR CONCRETE, STRUCTURES   | TON          | HBP Federal Aid (Non-FM) | 0.000                |  |               |
| FINE AGGREGATE FOR CONCRETE, STRUCTURES   | TON          | HBP Federal Aid (Non-FM) | 0.000                |  |               |
| FLY ASH   | TON          | HBP Federal Aid (Non-FM) | 0.000                |  |               |
| PORTLAND CEMENT   | TON          | HBP Federal Aid (Non-FM) | 0.000                |  |               |
| READY MIX CONCRETE FOR STRUCTURES   | CY           | HBP Federal Aid (Non-FM) | 0.000                |  |               |
| STEEL REINFORCEMENT, APPROVED SUPPLIER  | LB           | HBP Federal Aid (Non-FM) | 0.000                |  |               |
| WATER FOR CONCRETE AND MORTAR   | GAL          | HBP Federal Aid (Non-FM) | 0.000                |  |               |
| 1 item posting  |              |                          |                      | <b>Total Posted Amount: \$6,849.00</b> |               |

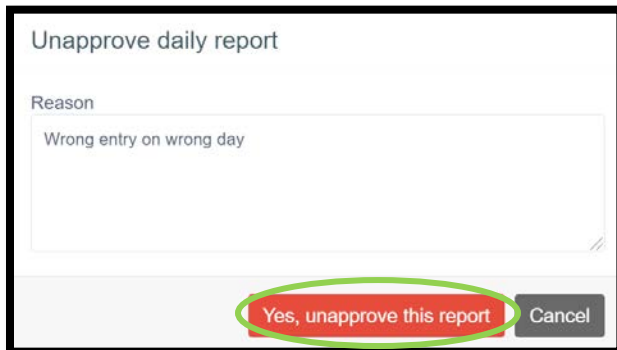


## I. Un-approving a Daily Report

There may be occasions which make it necessary for an approved Daily Report to be un-approved and revised. To undo the approval of a previously approved Daily Report, click on the blue “Undo Approval” button in the upper, right corner of the selected Daily Report. Note: Not all user roles have a high enough level of access to undo approval on a Daily Report. If this button does not appear, it is likely that your access type is not adequate to make the change.



When un-approval of a report is requested, this pop-up box will appear, and the person performing the un-approving action will have to enter a reason for retracting the report. When a reason has been entered, click the red “Yes, unapprove this report” button.



Once un-approved, the status of the Daily Report should change to “pending”.

Note: If the Daily Report has been included on a payment that is in Pending or Approved status, the payment must be brought back to Draft status before the Daily Report can be unapproved. If the Daily Report has been included on a payment that has been put in Paid status, it cannot be unapproved (no exceptions!).

# 6 - Items

The Items tab contains a listing of each contract item and displays each item's progress to date. This tab can be accessed on the left toolbar as shown below. **The Items tab is NOT where you record item quantity progress or input item quantities for payment.** Item quantities are input in the Item Postings tab of the Daily Report. Refer to [Subsection D. Item Postings Tab](#) in [Section 4. Daily Reports and Postings](#) for information on entering quantities.

The screenshot displays the 'Overview' page for project 75-C075-166, which is marked as 'Under Construction'. The left sidebar contains navigation options: OVERVIEW, QUERY, ALL REPORTS, DAILY ACTIVITIES, **ITEMS** (highlighted with a green circle), MATERIALS, STOCKPILES, and TIME LIMITS. The main content area is divided into several sections:

- General Information:** Includes a 'Project' section with 'Work Type' PCC PAVEMENT WIDENING / PCC RESURFACING, a 'Location' section with details about K 49, and a 'Management' section with 'Prime Contractor' GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.
- Awarded Amount:** \$2,482,485.15
- Authorized Amount:** \$2,482,485.15
- Approved Changes:** \$0.00
- Description:** STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- November 15, 2022
- Amount Paid:** A table showing 0% of the awarded and authorized amounts have been paid so far.

| Amount paid so far | 0% | of your Awarded | 0% | of your Authorized | 0% |
|--------------------|----|-----------------|----|--------------------|----|
| \$0.00             |    | \$2,482,485.15  |    | \$2,482,485.15     |    |



When the Items tab is opened, a view will appear showing each item and each item's progress.

| Line Number                              | Item ID      | Unit | Original Quantity    | Authorized Quantity | Quantity Placed | Unit Price | Authorized Amount |
|--|--------------|------|----------------------|---------------------|-----------------|------------|-------------------|
| 0010                                     | 2102-2625000 | CY   | 4,360.000            | 4,360.000           | 711.111         | \$15.000   | \$65,400.00       |
| EMBANKMENT-IN-PLACE                      |              |      |                      |                     |                 |            |                   |
| <b>Quantity Placed</b>                   |              |      | <b>Quantity Paid</b> |                     |                 |            |                   |
| 16.3%                                    |              |      | 0.0%                 |                     |                 |            |                   |
| 0020                                     | 2102-2710070 | CY   | 620.000              | 620.000             | 0.000           | \$10.000   | \$6,200.00        |
| EXCAVATION, CLASS 10, ROADWAY AND BORROW |              |      |                      |                     |                 |            |                   |
| <b>Quantity Placed</b>                   |              |      | <b>Quantity Paid</b> |                     |                 |            |                   |
| 0.0%                                     |              |      | 0.0%                 |                     |                 |            |                   |
| 0030                                     | 2105-8425015 | CY   | 2,200.000            | 2,200.000           | 0.000           | \$8.000    | \$17,600.00       |
| TOPSOIL, STRIP, SALVAGE AND SPREAD       |              |      |                      |                     |                 |            |                   |
| <b>Quantity Placed</b>                   |              |      | <b>Quantity Paid</b> |                     |                 |            |                   |
| 0.0%                                     |              |      | 0.0%                 |                     |                 |            |                   |
| 0040                                     | 2115-0100000 | CY   | 636.000              | 636.000             | 0.000           | \$80.000   | \$50,880.00       |
| MODIFIED SUBBASE                         |              |      |                      |                     |                 |            |                   |
| <b>Quantity Placed</b>                   |              |      | <b>Quantity Paid</b> |                     |                 |            |                   |
| 0.0%                                     |              |      | 0.0%                 |                     |                 |            |                   |
| 0050                                     | 2123-7450000 | STA  | 7.900                | 7.900               | 0.000           | \$220.000  | \$1,738.00        |
| SHOULDER CONSTRUCTION, EARTH             |              |      |                      |                     |                 |            |                   |
| <b>Quantity Placed</b>                   |              |      | <b>Quantity Paid</b> |                     |                 |            |                   |
| 0.0%                                     |              |      | 0.0%                 |                     |                 |            |                   |
| 0060                                     | 2123-7450020 | STA  | 49.000               | 49.000              | 40.000          | \$220.000  | \$10,780.00       |
| SHOULDER FINISHING, EARTH                |              |      |                      |                     |                 |            |                   |
| <b>Quantity Placed</b>                   |              |      | <b>Quantity Paid</b> |                     |                 |            |                   |
| 81.6%                                    |              |      | 0.0%                 |                     |                 |            |                   |

Each section will have its own header, so if multiple sections (divisions) are present within a project, you will be able to identify the items within each section. Additionally, a total cost per section is shown in the right column at the bottom of each section's item listing as shown below. The total contract cost will be shown after the last section as well.

| MOBILIZATION                            |              |      |            |  |               |       |             |  |                             |
|---|--------------|------|------------|--|---------------|-------|-------------|--|-----------------------------|
| Quantity Placed                         |              |      |            |  | Quantity Paid |       |             |  |                             |
| 0.0%                                    |              |      |            |  | 0.0%          |       |             |  |                             |
| 0200                                    | 2536-6745045 | LS   | 1.000      |  | 1.000         | 0.000 | \$6,300.000 |  | \$6,300.00                  |
| RMVL OF ASBESTOS                        |              |      |            |  |               |       |             |  |                             |
| Quantity Placed                         |              |      |            |  | Quantity Paid |       |             |  |                             |
| 0.0%                                    |              |      |            |  | 0.0%          |       |             |  |                             |
| Displaying all 20 items                 |              |      |            |  |               |       |             |  |                             |
| Section: 2 - ROADWAY ITEMS              |              |      |            |  |               |       |             |  | Section Total: \$913,128.99 |
| <a href="#">Add Unattached</a>          |              |      |            |  |               |       |             |  |                             |
| 0210                                    | 2101-0850001 | ACRE | 2.700      |  | 2.700         | 0.000 | \$4,250.000 |  | \$11,475.00                 |
| CLEAR+GRUBB                             |              |      |            |  |               |       |             |  |                             |
| Quantity Placed                         |              |      |            |  | Quantity Paid |       |             |  |                             |
| 0.0%                                    |              |      |            |  | 0.0%          |       |             |  |                             |
| 0220                                    | 2102-2625001 | CY   | 36,540.000 |  | 36,540.000    | 0.000 | \$6.750     |  | \$246,645.00                |
| EMBANKMENT-IN-PLACE, CONTRACTOR FURNISH |              |      |            |  |               |       |             |  |                             |
| Quantity Placed                         |              |      |            |  | Quantity Paid |       |             |  |                             |
| 0.0%                                    |              |      |            |  | 0.0%          |       |             |  |                             |
| 0230                                    | 2102-2710070 | CY   | 24,950.000 |  | 24,950.000    | 0.000 | \$3.500     |  | \$87,325.00                 |
| EXCAVATION, CL 10, RDWY+BORROW          |              |      |            |  |               |       |             |  |                             |
| Quantity Placed                         |              |      |            |  | Quantity Paid |       |             |  |                             |
| 0.0%                                    |              |      |            |  | 0.0%          |       |             |  |                             |
| 0240                                    | 2105-8425015 | CY   | 5,920.000  |  | 5,920.000     | 0.000 | \$4.000     |  | \$23,680.00                 |
| TOPSOIL, STRIP, SALVAGE+SPREAD          |              |      |            |  |               |       |             |  |                             |
| Quantity Placed                         |              |      |            |  | Quantity Paid |       |             |  |                             |
| 0.0%                                    |              |      |            |  | 0.0%          |       |             |  |                             |
| 0250                                    | 2115-0100000 | CY   | 75.000     |  | 75.000        | 0.000 | \$60.000    |  | \$4,500.00                  |
| MODIFIED SUBBASE                        |              |      |            |  |               |       |             |  |                             |
| Quantity Placed                         |              |      |            |  | Quantity Paid |       |             |  |                             |
| 0.0%                                    |              |      |            |  | 0.0%          |       |             |  |                             |
| 0260                                    | 2123-7450000 | STA  | 14.000     |  | 14.000        | 0.000 | \$225.000   |  | \$3,150.00                  |

Note: For contracts containing multiple projects which share time limit constraints, each project in the contract will be set up and displayed as a section rather than as its own project. Multiple project contracts must be set up this way in order to share time charges.

There is an option to add unattached items to the project. However, this should not be done for DOT-let projects. The DOT requires a change order to be used to add an item to a contract.

| MOBILIZATION                            |              |      |            |  |               |       |             |  |                             |
|---|--------------|------|------------|--|---------------|-------|-------------|--|-----------------------------|
| Quantity Placed                         |              |      |            |  | Quantity Paid |       |             |  |                             |
| 0.0%                                    |              |      |            |  | 0.0%          |       |             |  |                             |
| 0200                                    | 2536-6745045 | LS   | 1.000      |  | 1.000         | 0.000 | \$6,300.000 |  | \$6,300.00                  |
| RMVL OF ASBESTOS                        |              |      |            |  |               |       |             |  |                             |
| Quantity Placed                         |              |      |            |  | Quantity Paid |       |             |  |                             |
| 0.0%                                    |              |      |            |  | 0.0%          |       |             |  |                             |
| Displaying all 20 items                 |              |      |            |  |               |       |             |  |                             |
| Section: 2 - ROADWAY ITEMS              |              |      |            |  |               |       |             |  | Section Total: \$913,128.99 |
| <del>Add Unattached</del>               |              |      |            |  |               |       |             |  |                             |
| 0210                                    | 2101-0850001 | ACRE | 2.700      |  | 2.700         | 0.000 | \$4,250.000 |  | \$11,475.00                 |
| CLEAR+GRUBB                             |              |      |            |  |               |       |             |  |                             |
| Quantity Placed                         |              |      |            |  | Quantity Paid |       |             |  |                             |
| 0.0%                                    |              |      |            |  | 0.0%          |       |             |  |                             |
| 0220                                    | 2102-2625001 | CY   | 36,540.000 |  | 36,540.000    | 0.000 | \$6.750     |  | \$246,645.00                |
| EMBANKMENT-IN-PLACE, CONTRACTOR FURNISH |              |      |            |  |               |       |             |  |                             |
| Quantity Placed                         |              |      |            |  | Quantity Paid |       |             |  |                             |
| 0.0%                                    |              |      |            |  | 0.0%          |       |             |  |                             |
| 0230                                    | 2102-2710070 | CY   | 24,950.000 |  | 24,950.000    | 0.000 | \$3.500     |  | \$87,325.00                 |
| EXCAVATION, CL 10, RDWY+BORROW          |              |      |            |  |               |       |             |  |                             |
| Quantity Placed                         |              |      |            |  | Quantity Paid |       |             |  |                             |
| 0.0%                                    |              |      |            |  | 0.0%          |       |             |  |                             |
| 0240                                    | 2105-8425015 | CY   | 5,920.000  |  | 5,920.000     | 0.000 | \$4.000     |  | \$23,680.00                 |
| TOPSOIL, STRIP, SALVAGE+SPREAD          |              |      |            |  |               |       |             |  |                             |
| Quantity Placed                         |              |      |            |  | Quantity Paid |       |             |  |                             |
| 0.0%                                    |              |      |            |  | 0.0%          |       |             |  |                             |
| 0250                                    | 2115-0100000 | CY   | 75.000     |  | 75.000        | 0.000 | \$60.000    |  | \$4,500.00                  |
| MODIFIED SUBBASE                        |              |      |            |  |               |       |             |  |                             |
| Quantity Placed                         |              |      |            |  | Quantity Paid |       |             |  |                             |
| 0.0%                                    |              |      |            |  | 0.0%          |       |             |  |                             |
| 0260                                    | 2123-7450000 | STA  | 14.000     |  | 14.000        | 0.000 | \$225.000   |  | \$3,150.00                  |

A history of the postings and payments made for any item can be found in the item's history. To view the Item History, click on the three blue lines on the left end of the line containing the desired bid item.

| Line Number  | Item ID      | Unit | Original Quantity | Authorized Quantity | Quantity Placed | Unit Price | Authorized Amount |
|--|--------------|------|-------------------|---------------------|-----------------|------------|-------------------|
| Section: 0001 - FM-C004(116)--55-04, Acct ID- 38373, ROADWAY ITEMS |              |      |                   |                     |                 |            |                   |
| 0010   | 2121-7425020 | TON  | 2,461.550         | 2,461.550           | 3,503.690       | \$31.300   | \$77,046.52       |
| GRANULAR SHOULDERS, TYPE B   |              |      |                   |                     |                 |            |                   |
| Quantity Placed  |              |      | 100.0%            |                     | +42.3%          |            | Quantity Paid     |
| Quantity Paid  |              |      | 0.0%              |                     |                 |            |                   |
| 0020   | 2214-5145150 | SY   | 83,157.890        | 83,157.890          | 88,697.767      | \$1.710    | \$142,199.99      |
| PAVEMENT SCARIFICATION   |              |      |                   |                     |                 |            |                   |
| Quantity Placed  |              |      | 100.0%            |                     | +6.7%           |            | Quantity Paid     |
| Quantity Paid  |              |      | 0.0%              |                     |                 |            |                   |
| 0030   | 2303-1042500 | TON  | 8,146.030         | 8,146.030           | 8,131.100       | \$56.240   | \$458,132.73      |
| HOT MIX ASPHALT HIGH TRAFFIC, INTERMEDIATE COURSE, 1/2 IN. MIX     |              |      |                   |                     |                 |            |                   |
| Quantity Placed  |              |      | 99.8%             |                     |                 |            | Quantity Paid     |
| Quantity Paid  |              |      | 0.0%              |                     |                 |            |                   |

In the pop-out box, click "History".

The screenshot displays a software interface for managing items. On the left is a vertical navigation menu with icons and labels for 'ALL REPORTS', 'DAILY ACTIVITIES', 'ITEMS' (highlighted in red), 'MATERIALS', 'STOCKPILES', 'TIME LIMITS', and 'CHANGE ORDERS'. The main area is titled 'Items' and contains a search bar and a table with columns: Line Number, Item ID, Unit, Original Quantity, Authorized Quantity, Quantity Placed, Unit Price, and Authorized Amount. A section header reads 'Section: 0001 - FM-C004(116)--55-04, Acct ID- 38373, ROADWAY ITEMS'. The table lists four items, each with a 'Quantity Placed' and 'Quantity Paid' progress bar. A context menu is open over the 'History' option, which is circled in green. The menu also includes 'Materials', 'Add Stockpile', and 'Edit'.

| Line Number  | Item ID      | Unit | Original Quantity | Authorized Quantity | Quantity Placed | Unit Price | Authorized Amount |
|--|--------------|------|-------------------|---------------------|-----------------|------------|-------------------|
| Section: 0001 - FM-C004(116)--55-04, Acct ID- 38373, ROADWAY ITEMS                         |              |      |                   |                     |                 |            |                   |
| 0010   | 2121-7425020 | TON  | 2,461.550         | 2,461.550           | 3,503.690       | \$31.300   | \$77,046.52       |
| GRANULAR SHOULDERS, TYPE B   |              |      |                   |                     |                 |            |                   |
| Quantity Placed  |              |      | 100.0%            |                     | +42.3%          |            |                   |
| Quantity Paid  |              |      | 0.0%              |                     |                 |            |                   |
| 0020   | 2214-5145150 | SY   | 83,157.890        | 83,157.890          | 88,697.767      | \$1.710    | \$142,199.99      |
| PAVEMENT SCARIFICATION   |              |      |                   |                     |                 |            |                   |
| Quantity Placed  |              |      | 100.0%            |                     | +6.7%           |            |                   |
| Quantity Paid  |              |      | 0.0%              |                     |                 |            |                   |
| Materials  | 2303-1042500 | TON  | 8,146.030         | 8,146.030           | 8,131.100       | \$56.240   | \$458,132.73      |
| HOT MIX ASPHALT HIGH TRAFFIC, INTERMEDIATE COURSE, 1/2 IN. MIX                             |              |      |                   |                     |                 |            |                   |
| Quantity Placed  |              |      | 99.0%             |                     | 0.0%            |            |                   |
| Quantity Paid  |              |      | 0.0%              |                     |                 |            |                   |
| 0040   | 2303-1043500 | TON  | 7,625.090         | 7,625.090           | 7,755.500       | \$56.950   | \$434,248.88      |
| HOT MIX ASPHALT HIGH TRAFFIC, SURFACE COURSE, 1/2 IN. MIX, NO SPECIAL FRICTION REQUIREMENT |              |      |                   |                     |                 |            |                   |

The resulting screen will show a log of the postings and payments associated with the bid item.

ALL REPORTS  
 DAILY ACTIVITIES  
**ITEMS**  
 MATERIALS  
 STOCKPILES  
 TIME LIMITS  
 CHANGE ORDERS  
 PUNCH LIST  
 PAYMENTS  
 CONTRACTORS  
 FUNDING

### Item History

|   |   |
|---|---|
| <b>Unit</b><br>TON                        | <b>Unit Price</b><br>\$56.240                     |
| <b>Complete?</b><br>No                    | <b>Quantity Paid</b><br>0.000                     |
| <b>Original Quantity</b><br>8,146.030     | <b>Quantity Placed but not Paid</b><br>8,131.100  |
| <b>Authorized Quantity</b><br>8,146.030   | <b>Amount Paid</b><br>\$0.00                      |
| <b>Total Quantity Placed</b><br>8,131.100 | <b>Amount Placed but not Paid</b><br>\$457,293.06 |
| <b>Quantity Remaining</b><br>14.930       | <b>Authorized Amount</b><br>\$458,132.73          |
| <b>Pending Quantity</b><br>0.000          |   |

### Postings

| Daily Report Date         | Created By   | Status | Quantity Placed | Amount Placed       |
|---------------------------|--------------|--------|-----------------|---------------------|
| 07/31/2022                | Nicole Stinn | Final  | 0.300           | \$16.87             |
| 05/16/2022                | Nicole Stinn | Final  | 8,130.800       | \$457,276.19        |
| Displaying all 2 postings |              |        | <b>Totals:</b>  | <b>\$457,293.06</b> |

### Payments

| End Date                  | Status   | Payment Number | Placed Quantity | Overage Quantity | Quantity Withheld | Amount Paid         |
|---------------------------|----------|----------------|-----------------|------------------|-------------------|---------------------|
| 08/01/2022                | Approved | 2              | 0.300           | 0.000            | 0.000             | \$16.88             |
| 05/17/2022                | Approved | 1              | 8,130.800       | 0.000            | 0.000             | \$457,276.19        |
| Displaying all 2 payments |          |                | <b>Totals:</b>  | <b>8,131.100</b> |                   | <b>\$457,293.07</b> |

?

Help

?

# 7 - Materials

(Reserved for Future Instructions)

Reserved for future instructions on Materials Tab. For Iowa DOT administered projects, do NOT use or enter any values for Materials at this time. Refer to [Subsection F. Submitting Daily Reports for Approval & Reviewing Materials](#) in [Section 4. Daily Reports and Postings](#) for further guidance on reviewing materials for items posted in Daily Reports.



# 8 - Stockpiles

## A. Adding a Stockpile Item

The Stockpiles screen is where all stockpile additions and reductions are entered. As long as the correct prices and quantities are entered, stockpile payments and reductions will be processed at the appropriate unit rates. The stockpile quantity automatically reduces for an item when that item is incorporated into an Item Posting unless the user has specified a future date for stockpile recoveries.

To access the Stockpiles tab, click on “Stockpiles” in the left menu.

21-C021-153 Under Construction  
STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

Overview Edit

**General Information**

Project

Work Type  
PCC OVERLAY

Location

Location  
On M27, from B40 North 6.0 Miles to City of Everly; On B24, from NE corner 16-96-38 W 4 miles to SW corner 18-96-38

Management

Prime Contractor

Awarded Amount \$  
\$4,553,445.96

Authorized Amount ✓  
\$4,580,158.96

Approved Changes ↗  
\$26,713.00

**Description**

STP-S-C021(153)--5E-21, Acct ID- 38934,  
FM-C021(154)--55-21, Acct ID- 38935,  
Letting Date- November 15, 2022

**Amount Paid**

| Amount |  |  |  |
|--------|--|--|--|
|        |  |  |  |



This will bring you to the Stockpiles screen. To add a new stockpile item, click on the blue “Add” button in the top, right corner of the screen. A separate stockpile entry is made for each bid item being stockpiled.

View if no stockpiles exist

The screenshot shows the 'Stockpiles' interface for project 21-C021-153, which is marked as 'Under Construction'. The page header includes the project ID and a list of account IDs and letting dates. The main content area is titled 'Stockpiles' and contains a message: 'No stockpiles found.' A blue 'Add' button is circled in green in the top right corner. The left sidebar contains navigation options: QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, and STOCKPILES (highlighted in red). The footer includes the Infotech logo, support hours (7:00 AM - 8:00 PM Eastern), contact information (Phone: 888 352 2439, Email: support@appia.net), and copyright information (Copyright © 2023, Infotech®. All rights reserved. Appia® is a registered trademark of Infotech. Terms / Privacy / DMCA).

View if stockpiles already exist

The screenshot shows the 'Stockpiles' interface with one stockpile entry. The 'Add' button in the top right corner is circled in green. The table below shows the details of the stockpile:

| Stockpile                                  | Fund Package                                    | Value of Materials | Recovery | Remaining    |   |
|--|---|--------------------|----------|--------------|---|
| #1 2121-7425020 GRANULAR SHOULDERS, TYPE B | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 | \$140,000.00       | \$0.00   | \$140,000.00 |   |

Below the table, there is a 'Recovery Progress' section with a progress bar showing 0.0% completion. At the bottom, it says 'Displaying 1 stockpile'.

A screen will appear in which the new stockpile information can be entered. Editable fields include “Item”, “Fund Package”, “Value of Materials”, “Quantity for Recovery”, “Begin Recovery On”, and “Description”. Some of the fields may not be editable immediately, but they will open up for editing as soon as the “Item” is chosen.

Do **NOT** hit the “Enter” key on the keyboard until you are done entering **ALL** data in this screen. If you do, it will save automatically, and you’ll have to try to enter adjustments to get the numbers to match your original intent.

The screenshot shows a web form titled "New" with a "Save" button and a "Cancel" button in the top right corner. The form contains several input fields:

- \* Item**: A dropdown menu currently showing "\*\* None Selected \*\*".
- \* Fund Package**: A dropdown menu currently showing "\*\* None Selected \*\*".
- \* Value of Materials**: A text input field.
- \* Quantity for Recovery**: A text input field.
- Recovery Rate**: A text input field.
- \* Begin Recovery On**: A date input field showing "02/23/2023".
- Description**: A text input field.

On the right side of the form, there is a message: "Please select an item and a fund package." Above this message are two faint, overlapping rectangular boxes, possibly representing a list of items or fund packages.

Item: The Item field is a pull-down box. Choose the item to be stockpiled. If the project contains multiple sections, make sure you scroll through the items to select the item from the correct section.

The screenshot shows a web form titled "New" with a "Save" button and a "Cancel" button in the top right corner. The form contains several fields:

- \* Item**: A dropdown menu currently showing "\*\* None Selected \*\*". The menu is open, displaying a list of items. "Section 0001" is circled in green. Below it, "0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B" is also circled in green. Other items include "0010: 2110-3825010 GRANULAR MATERIAL", "0030: 2214-5145150 PAVEMENT SCARIFICATION", and "0040: 2301-0690220 BRIDGE APPROACH, SECONDARY".
- Recovery Rate**: A section header.
- \* Begin Recovery On**: A date field containing "02/23/2023".
- Description**: A text input field.

To the right of the form, there is a faint, semi-transparent image of a document and a message that reads: "Please select an item and a fund package."

Fund Package: Select the Fund Package associated with the chosen item.

New Save Cancel

|  |   |   |
|--|---|---|
| <b>* Item</b><br>0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B           | <b>Authorized Quantity</b><br>9,550.000 | <b>Extension</b><br>\$312,858.00        |
| <b>* Fund Package</b><br>21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 | <b>Quantity Placed</b><br>0.000         | <b>Amount Paid</b><br>\$0.00            |
| <b>* Value of Materials</b><br>\$312,858.00                              | <b>Quantity Paid</b><br>0.000           | <b>Stockpiled Amount</b><br>\$0.00      |
| <b>* Quantity for Recovery</b><br>9,550.000                              | <b>Quantity Available</b><br>9,550.000  | <b>Amount Available</b><br>\$312,858.00 |
| <b>Recovery Rate</b><br>\$32.760   | <b>Unit</b><br>TON                      |   |
| <b>* Begin Recovery On</b><br>02/23/2023                                 | <b>Unit Price</b><br>\$32.760           |   |
| <b>Description</b>   |   |   |

Value of Materials: The Value of Materials field will automatically populate with the extended (total) contract price for the selected bid item as soon as the Item is chosen. **Override this value.** The value you will enter is the invoice cost that the contractor must provide to you for the quantity of materials actually being stockpiled. This invoice cost needs to be factored at 100% (actual invoice cost) if the materials are stored on-site or 90% of the invoice cost if the materials are stockpiled offsite, according to [I.M. 6.000, Attachment D](#), section 2.51.

New
Save Cancel

|  |   |                            |                  |           |              |                        |                    |       |        |                      |                          |       |        |                           |                         |           |              |             |  |     |  |                   |  |          |  |
|--|---|----------------------------|------------------|-----------|--------------|------------------------|--------------------|-------|--------|----------------------|--------------------------|-------|--------|---------------------------|-------------------------|-----------|--------------|-------------|--|-----|--|-------------------|--|----------|--|
| <p><b>* Item</b></p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B</div> <p><b>* Fund Package</b></p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153</div> <p><b>* Value of Materials</b></p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px; text-align: right;">\$140,000.00</div> <p><b>* Quantity for Recovery</b></p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px; text-align: right;">9,550.000</div> <p><b>Recovery Rate</b></p> <p>\$14.660</p> <p><b>* Begin Recovery On</b></p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">02/23/2023</div> <p><b>Description</b></p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> </div> | <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"><b>Authorized Quantity</b></td> <td style="width: 50%;"><b>Extension</b></td> </tr> <tr> <td>9,550.000</td> <td>\$312,858.00</td> </tr> <tr> <td><b>Quantity Placed</b></td> <td><b>Amount Paid</b></td> </tr> <tr> <td>0.000</td> <td>\$0.00</td> </tr> <tr> <td><b>Quantity Paid</b></td> <td><b>Stockpiled Amount</b></td> </tr> <tr> <td>0.000</td> <td>\$0.00</td> </tr> <tr> <td><b>Quantity Available</b></td> <td><b>Amount Available</b></td> </tr> <tr> <td>9,550.000</td> <td>\$312,858.00</td> </tr> <tr> <td><b>Unit</b></td> <td></td> </tr> <tr> <td>TON</td> <td></td> </tr> <tr> <td><b>Unit Price</b></td> <td></td> </tr> <tr> <td>\$32.760</td> <td></td> </tr> </table> | <b>Authorized Quantity</b> | <b>Extension</b> | 9,550.000 | \$312,858.00 | <b>Quantity Placed</b> | <b>Amount Paid</b> | 0.000 | \$0.00 | <b>Quantity Paid</b> | <b>Stockpiled Amount</b> | 0.000 | \$0.00 | <b>Quantity Available</b> | <b>Amount Available</b> | 9,550.000 | \$312,858.00 | <b>Unit</b> |  | TON |  | <b>Unit Price</b> |  | \$32.760 |  |
| <b>Authorized Quantity</b>   | <b>Extension</b>  |                            |                  |           |              |                        |                    |       |        |                      |                          |       |        |                           |                         |           |              |             |  |     |  |                   |  |          |  |
| 9,550.000  | \$312,858.00  |                            |                  |           |              |                        |                    |       |        |                      |                          |       |        |                           |                         |           |              |             |  |     |  |                   |  |          |  |
| <b>Quantity Placed</b>   | <b>Amount Paid</b>  |                            |                  |           |              |                        |                    |       |        |                      |                          |       |        |                           |                         |           |              |             |  |     |  |                   |  |          |  |
| 0.000  | \$0.00  |                            |                  |           |              |                        |                    |       |        |                      |                          |       |        |                           |                         |           |              |             |  |     |  |                   |  |          |  |
| <b>Quantity Paid</b>   | <b>Stockpiled Amount</b>  |                            |                  |           |              |                        |                    |       |        |                      |                          |       |        |                           |                         |           |              |             |  |     |  |                   |  |          |  |
| 0.000  | \$0.00  |                            |                  |           |              |                        |                    |       |        |                      |                          |       |        |                           |                         |           |              |             |  |     |  |                   |  |          |  |
| <b>Quantity Available</b>  | <b>Amount Available</b>   |                            |                  |           |              |                        |                    |       |        |                      |                          |       |        |                           |                         |           |              |             |  |     |  |                   |  |          |  |
| 9,550.000  | \$312,858.00  |                            |                  |           |              |                        |                    |       |        |                      |                          |       |        |                           |                         |           |              |             |  |     |  |                   |  |          |  |
| <b>Unit</b>  |   |                            |                  |           |              |                        |                    |       |        |                      |                          |       |        |                           |                         |           |              |             |  |     |  |                   |  |          |  |
| TON  |   |                            |                  |           |              |                        |                    |       |        |                      |                          |       |        |                           |                         |           |              |             |  |     |  |                   |  |          |  |
| <b>Unit Price</b>  |   |                            |                  |           |              |                        |                    |       |        |                      |                          |       |        |                           |                         |           |              |             |  |     |  |                   |  |          |  |
| \$32.760   |   |                            |                  |           |              |                        |                    |       |        |                      |                          |       |        |                           |                         |           |              |             |  |     |  |                   |  |          |  |

Quantity for Recovery: The Quantity for Recovery is the quantity of materials being put into the stockpile or that are in the stockpile. The Quantity for Recovery field will automatically populate with the contract quantity or the quantity already posted in Item Postings for the selected bid item as soon as the Item is chosen. **Override this value.** The value you will enter is the actual quantity of the bid item material that is being stockpiled.

New Save Cancel

|  |   |   |
|--|---|---|
| <b>* Item</b><br>0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B           | <b>Authorized Quantity</b><br>9,550.000 | <b>Extension</b><br>\$312,858.00        |
| <b>* Fund Package</b><br>21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 | <b>Quantity Placed</b><br>0.000         | <b>Amount Paid</b><br>\$0.00            |
| <b>* Value of Materials</b><br>\$140,000.00                              | <b>Quantity Paid</b><br>0.000           | <b>Stockpiled Amount</b><br>\$0.00      |
| <b>* Quantity for Recovery</b><br>7,060.000                              | <b>Quantity Available</b><br>9,550.000  | <b>Amount Available</b><br>\$312,858.00 |
| <b>Recovery Rate</b><br>\$19.830   | <b>Unit</b><br>TON                      |   |
| <b>* Begin Recovery On</b><br>02/23/2023                                 | <b>Unit Price</b><br>\$32.760           |   |
| <b>Description</b>   |   |   |



Recovery Rate: The Recovery Rate will automatically calculate based on the Value of Materials and Quantity for Recovery entries. It is the Value of Materials divided by the Quantity for Recovery. The Recovery Rate should be less than the Unit Price of the bid item. This is because stockpile payments are for material costs only, and bid item unit prices include materials, labor, and overhead costs. Double check the Recovery Rate against the Unit Price (shown to the right of the Recovery Rate line) to make sure the Recovery Rate is less.

New
Save Cancel

|   |   |                            |              |                  |              |                        |       |                    |        |                      |       |                          |        |                           |           |                         |              |             |     |  |  |                   |          |  |  |
|---|---|----------------------------|--------------|------------------|--------------|------------------------|-------|--------------------|--------|----------------------|-------|--------------------------|--------|---------------------------|-----------|-------------------------|--------------|-------------|-----|--|--|-------------------|----------|--|--|
| <p><b>* Item</b></p> <input type="text" value="0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B"/> <p><b>* Fund Package</b></p> <input type="text" value="21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153"/> <p><b>* Value of Materials</b></p> <input type="text" value="\$140,000.00"/> <p><b>* Quantity for Recovery</b></p> <input type="text" value="7,060.000"/> <p><b>Recovery Rate</b><br/>\$19.830</p> <p><b>* Begin Recovery On</b></p> <input type="text" value="02/23/2023"/> <p><b>Description</b></p> <input type="text"/> | <table style="width: 100%; border-collapse: collapse;"> <tr> <td><b>Authorized Quantity</b></td> <td>9,550.000</td> <td><b>Extension</b></td> <td>\$312,858.00</td> </tr> <tr> <td><b>Quantity Placed</b></td> <td>0.000</td> <td><b>Amount Paid</b></td> <td>\$0.00</td> </tr> <tr> <td><b>Quantity Paid</b></td> <td>0.000</td> <td><b>Stockpiled Amount</b></td> <td>\$0.00</td> </tr> <tr> <td><b>Quantity Available</b></td> <td>9,550.000</td> <td><b>Amount Available</b></td> <td>\$312,858.00</td> </tr> <tr> <td><b>Unit</b></td> <td colspan="3">TON</td> </tr> <tr> <td><b>Unit Price</b></td> <td colspan="3">\$32.760</td> </tr> </table> | <b>Authorized Quantity</b> | 9,550.000    | <b>Extension</b> | \$312,858.00 | <b>Quantity Placed</b> | 0.000 | <b>Amount Paid</b> | \$0.00 | <b>Quantity Paid</b> | 0.000 | <b>Stockpiled Amount</b> | \$0.00 | <b>Quantity Available</b> | 9,550.000 | <b>Amount Available</b> | \$312,858.00 | <b>Unit</b> | TON |  |  | <b>Unit Price</b> | \$32.760 |  |  |
| <b>Authorized Quantity</b>  | 9,550.000   | <b>Extension</b>           | \$312,858.00 |                  |              |                        |       |                    |        |                      |       |                          |        |                           |           |                         |              |             |     |  |  |                   |          |  |  |
| <b>Quantity Placed</b>  | 0.000   | <b>Amount Paid</b>         | \$0.00       |                  |              |                        |       |                    |        |                      |       |                          |        |                           |           |                         |              |             |     |  |  |                   |          |  |  |
| <b>Quantity Paid</b>  | 0.000   | <b>Stockpiled Amount</b>   | \$0.00       |                  |              |                        |       |                    |        |                      |       |                          |        |                           |           |                         |              |             |     |  |  |                   |          |  |  |
| <b>Quantity Available</b>   | 9,550.000   | <b>Amount Available</b>    | \$312,858.00 |                  |              |                        |       |                    |        |                      |       |                          |        |                           |           |                         |              |             |     |  |  |                   |          |  |  |
| <b>Unit</b>   | TON   |                            |              |                  |              |                        |       |                    |        |                      |       |                          |        |                           |           |                         |              |             |     |  |  |                   |          |  |  |
| <b>Unit Price</b>   | \$32.760  |                            |              |                  |              |                        |       |                    |        |                      |       |                          |        |                           |           |                         |              |             |     |  |  |                   |          |  |  |

Begin Recovery On: This is the earliest date on which the stockpile payment can be reduced (the earliest date when you can begin recovering the funds advanced to the contractor). Generally, this date is/should be left as the day of creation of the stockpile. However, if there is some reason you want to be able to incorporate a bid item’s material into a project and pay for the bid item without reducing the stockpile, this field could be set for a future date.

Description: Enter a description here, if desired.

Once all of the necessary and pertinent information has been entered into the editable fields, and once the Recovery Rate has been checked against the Unit Price, click the blue “Save” button in the top, right corner to save the stockpile information and place the stockpile “into service”.

**New** [Save](#) [Cancel](#)

|  |   |   |
|--|---|---|
| <b>* Item</b><br>0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B           | <b>Authorized Quantity</b><br>9,550.000 | <b>Extension</b><br>\$312,858.00        |
| <b>* Fund Package</b><br>21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 | <b>Quantity Placed</b><br>0.000         | <b>Amount Paid</b><br>\$0.00            |
| <b>* Value of Materials</b><br>\$140,000.00                              | <b>Quantity Paid</b><br>0.000           | <b>Stockpiled Amount</b><br>\$0.00      |
| <b>* Quantity for Recovery</b><br>7,060.000                              | <b>Quantity Available</b><br>9,550.000  | <b>Amount Available</b><br>\$312,858.00 |
| <b>Recovery Rate</b><br>\$19.830   | <b>Unit</b><br>TON                      |   |
| <b>* Begin Recovery On</b><br>02/23/2023                                 | <b>Unit Price</b><br>\$32.760           |   |
| <b>Description</b>   |   |   |

You will be returned to a Stockpile screen containing summary information for the stockpile just created.

## Stockpile Edit

**Stockpile**  
#1

**Begin Recovery On**  
02/23/2023

**Associated Item**  
0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B

**Associated Fund Package**  
21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153

**Recovery Rate**  
\$19.830 per item unit (TON)

**Value of Materials**  
\$140,000.00

**Recovered Amount**  
\$0.00

**Remaining Value**  
\$140,000.00

---

### Events

| Date       | Action  | Quantity Change | Value Change | Quantity Remaining | Value Remaining |
|------------|---------|-----------------|--------------|--------------------|-----------------|
| 02/23/2023 | Created | 7,060.000       | \$140,000.00 | 7,060.000          | \$140,000.00    |

Begin Recovery On: 02/23/2023.

Help Chat

To return to the main stockpile screen where all stockpiles are listed, either click on "Stockpiles" in the left menu or use the navigation path at the top to select "Stockpiles".

Projects / 21-C021-153 / **Stockpiles** / Stockpile #1

21-C021-153 Under Construction  
STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

### Stockpile Edit

|   |  |
|---|--|
| <b>Stockpile</b><br>#1  | <b>Begin Recovery On</b><br>02/23/2023 |
| <b>Associated Item</b><br>0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B           | <b>Description</b>                     |
| <b>Associated Fund Package</b><br>21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 |  |
| <b>Recovery Rate</b><br>\$19.830 per item unit (TON)                              |  |
| <b>Value of Materials</b><br>\$140,000.00   |  |
| <b>Recovered Amount</b><br>\$0.00   |  |
| <b>Remaining Value</b><br>\$140,000.00  |  |

The main Stockpile screen will show all of the stockpiles that have been created.

### Stockpiles Add

| Stockpile                                  | Fund Package                                    | Value of Materials | Recovery | Remaining    |                               |
|--|---|--------------------|----------|--------------|-------------------------------|
| #1 2121-7425020 GRANULAR SHOULDERS, TYPE B | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 | \$140,000.00       | \$0.00   | \$140,000.00 | <span>✎</span> <span>✖</span> |

**Recovery Progress**  
0.0%

Displaying 1 stockpile

## B. Editing an Existing Stockpile

As long as the correct prices and quantities are entered, stockpile payments and reductions will be processed at the appropriate unit rates. Stockpiles should not be edited just to make a reduction when the bid item is incorporated into the project. The stockpile quantity automatically reduces for an item when that item is incorporated into an Item Posting unless the user has specified a future date for stockpile recoveries. Stockpiles should only be edited if changes need to be made to the original stockpile material prices or if additional quantity is being added to the stockpile.

To access the Stockpiles tab, click on “Stockpiles” in the left menu.

The screenshot shows a software interface with a dark blue sidebar on the left containing navigation icons and labels: QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, and STOCKPILES (highlighted with a red circle). The main content area is titled '21-C021-153 Under Construction' and includes the following information:

STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

**Overview** Edit

**General Information**

- Project**
  - Work Type: PCC OVERLAY
- Location**
  - Location: On M27, from B40 North 6.0 Miles to City of Everly; On B24, from NE corner 16-96-38 W 4 miles to SW corner 18-96-38
- Management**
  - Prime Contractor

**Financial Summary**

- Awarded Amount: \$4,553,445.96
- Authorized Amount: \$4,580,158.96
- Approved Changes: \$26,713.00

**Description**

STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

**Amount Paid**

| Amount |
|--------|
|        |

This will bring you to the Stockpiles screen. To edit an existing stockpile entry, click on the blue circle with the pencil on the right end of the line containing the stockpile information.

**Stockpiles** [Add](#)

| Stockpile                                  | Fund Package                                    | Value of Materials | Recovery | Remaining    |
|--|---|--------------------|----------|--------------|
| #1 2121-7425020 GRANULAR SHOULDERS, TYPE B | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 | \$140,000.00       | \$0.00   | \$140,000.00 |

**Recovery Progress**  
0.0%

Displaying 1 stockpile

Alternately, click on the blue text on the left end of the stockpile line. Then click the blue “Edit” button in the top, right corner on the next screen.

**Stockpiles** [Add](#)

| Stockpile                                  | Fund Package                                    | Value of Materials | Recovery | Remaining    |
|--|---|--------------------|----------|--------------|
| #1 2121-7425020 GRANULAR SHOULDERS, TYPE B | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 | \$140,000.00       | \$0.00   | \$140,000.00 |

**Recovery Progress**  
0.0%

Displaying 1 stockpile

**Stockpile** [Edit](#)

**Stockpile**  
#1

**Associated Item**  
0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B

**Associated Fund Package**  
21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153

**Begin Recovery On**  
02/23/2023

**Description**

The screen that opens contains editable fields: “Value Change”, “Quantity Change”, “Begin Recovery On”, “Adjustment Effective Date”, and “Notes”.

### Edit

Save Cancel

|   |   |  |
|---|---|--|
| <b>Associated Item</b><br>0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B           | <b>Authorized Quantity</b><br>9,550.000 | <b>Extension</b><br>\$312,858.00         |
| <b>Associated Fund Package</b><br>21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 | <b>Quantity Placed</b><br>0.000         | <b>Amount Paid</b><br>\$0.00             |
| <b>Current Value of Materials</b><br>\$140,000.00                                 | <b>Quantity Paid</b><br>0.000           | <b>Stockpiled Amount</b><br>\$140,000.00 |
| <b>Current Quantity for Recovery</b><br>7,060.000                                 | <b>Quantity Available</b><br>9,550.000  | <b>Amount Available</b><br>\$312,858.00  |
| <b>* Value Change</b><br><input type="text" value="\$0.00"/>                      | <b>Unit</b><br>TON                      |  |
| <b>* Quantity Change</b><br><input type="text" value="0.000"/>                    | <b>Unit Price</b><br>\$32.760           |  |
| <b>* Begin Recovery On</b><br><input type="text" value="02/23/2023"/>             |   |  |
| <b>* Adjustment Effective Date</b><br><input type="text" value="02/23/2023"/>     |   |  |
| <b>New Value of Materials</b><br>\$140,000.00                                     |   |  |
| <b>New Quantity for Recovery</b><br>7,060.000                                     |   |  |
| <b>Current Recovery Rate</b><br>\$19.830  |   |  |
| <b>New Recovery Rate</b><br>\$19.830  |   |  |

Help Chat

Value Change: Enter the change in the invoice price of the materials being stockpiled. This value may be positive or negative.

### Edit

Save Cancel

|   |   |  |
|---|---|--|
| <b>Associated Item</b><br>0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B           | <b>Authorized Quantity</b><br>9,550.000 | <b>Extension</b><br>\$312,858.00         |
| <b>Associated Fund Package</b><br>21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 | <b>Quantity Placed</b><br>0.000         | <b>Amount Paid</b><br>\$0.00             |
| <b>Current Value of Materials</b><br>\$140,000.00                                 | <b>Quantity Paid</b><br>0.000           | <b>Stockpiled Amount</b><br>\$140,000.00 |
| <b>Current Quantity for Recovery</b><br>7,060.000                                 | <b>Quantity Available</b><br>9,550.000  | <b>Amount Available</b><br>\$312,858.00  |
| <b>* Value Change</b><br><input type="text" value="-10,000.00"/>                  | <b>Unit</b><br>TON                      |  |
| <b>* Quantity Change</b><br><input type="text" value="0.000"/>                    | <b>Unit Price</b><br>\$32.760           |  |
| <b>* Begin Recovery On</b><br><input type="text" value="02/23/2023"/>             |   |  |
| <b>* Adjustment Effective Date</b><br><input type="text" value="02/23/2023"/>     |   |  |
| <b>New Value of Materials</b><br>\$130,000.00                                     |   |  |
| <b>New Quantity for Recovery</b><br>7,060.000                                     |   |  |
| <b>Current Recovery Rate</b><br>\$19.830  |   |  |
| <b>New Recovery Rate</b><br>\$18.414  |   |  |

Help Chat



Quantity Change: Enter the change in the quantity of the bid item that is being stockpiled.

**Edit** Save Cancel

|   |   |  |
|---|---|--|
| <b>Associated Item</b><br>0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B           | <b>Authorized Quantity</b><br>9,550.000 | <b>Extension</b><br>\$312,858.00         |
| <b>Associated Fund Package</b><br>21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 | <b>Quantity Placed</b><br>0.000         | <b>Amount Paid</b><br>\$0.00             |
| <b>Current Value of Materials</b><br>\$140,000.00                                 | <b>Quantity Paid</b><br>0.000           | <b>Stockpiled Amount</b><br>\$140,000.00 |
| <b>Current Quantity for Recovery</b><br>7,060.000                                 | <b>Quantity Available</b><br>9,550.000  | <b>Amount Available</b><br>\$312,858.00  |
| <b>* Value Change</b><br><input type="text" value="-\$10,000.00"/>                | <b>Unit</b><br>TON                      |  |
| <b>* Quantity Change</b><br><input type="text" value="5.000"/>                    | <b>Unit Price</b><br>\$32.760           |  |
| <b>* Begin Recovery On</b><br><input type="text" value="02/23/2023"/>             |   |  |
| <b>* Adjustment Effective Date</b><br><input type="text" value="02/23/2023"/>     |   |  |
| <b>New Value of Materials</b><br>\$130,000.00                                     |   |  |
| <b>New Quantity for Recovery</b><br>7,065.000                                     |   |  |
| <b>Current Recovery Rate</b><br>\$19.830  |   |  |
| <b>New Recovery Rate</b><br>\$18.401  |   |  |

Help Chat

New Value of Materials: This is the new value of the stockpiled materials. It is the original Value of Materials plus the Value Change.

**New Quantity for Recovery:** This is the new total quantity of the stockpiled materials. It is the original Quantity for Recovery plus the Quantity Change.

**New Recovery Rate:** The New Recovery Rate value will automatically calculate based on the values input in the Value Change and Quantity Change fields. The New Recovery Rate is the New Value of Materials divided by the New Quantity for Recovery. The New Recovery Rate should be less than the Unit Price of the bid item. This is because stockpile payments are for material costs only, and bid item unit prices include materials, labor, and overhead costs. Double check the New Recovery Rate against the Unit Price (shown to the right of the Recovery Rate line) to make sure the New Recovery Rate is less. Also double check the New Recovery Rate against the original Recovery Rate to make sure the adjustment seems appropriate.

**Begin Recovery On:** This is the earliest date in which the stockpile payment can be reduced (the earliest date when you can begin recovering the funds advanced to the contractor). Generally, this date is/should be left as the day of creation of the stockpile. However, if there is some reason you want to be able to incorporate a bid item's material into a project and pay for the bid item without reducing the stockpile, this field could be set for a future date.

**Adjustment Effective Date:** This is the date that changes to the stockpile recovery rate will become effective. You cannot enter a date in the past.

**Notes:** Enter a note here, if desired.

**Add Attachment (button):** Add an attachment, if desired. An example of an attachment would be the invoice for the materials.

View of bottom part of screen with remaining fields and "Add Attachment" button.

**Recovery to Date**  
\$0.00

**Recovery Remaining**  
\$140,000.00

**Quantity Until Recovery**  
7,060.000


**Stockpile Description**

**Notes**

[Add Attachment](#)

| Date       | Action  | Quantity Change | Value Change | Quantity Remaining | Value Remaining |
|------------|---------|-----------------|--------------|--------------------|-----------------|
| 02/23/2023 | Created | 7,060.000       | \$140,000.00 | 7,060.000          | \$140,000.00    |

Begin Recovery On: 02/23/2023.

[Help](#) 

Once all of the necessary and pertinent information has been entered into the editable fields, and once the New Recovery Rate has been checked against the Unit Price and original Recovery Rate, click the blue “Save” button in the top, right corner to save the stockpile information.

### Edit

[Save](#) [Cancel](#)

|   |   |  |
|---|---|--|
| <b>Associated Item</b><br>0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B           | <b>Authorized Quantity</b><br>9,550.000 | <b>Extension</b><br>\$312,858.00         |
| <b>Associated Fund Package</b><br>21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 | <b>Quantity Placed</b><br>0.000         | <b>Amount Paid</b><br>\$0.00             |
| <b>Current Value of Materials</b><br>\$140,000.00                                 | <b>Quantity Paid</b><br>0.000           | <b>Stockpiled Amount</b><br>\$140,000.00 |
| <b>Current Quantity for Recovery</b><br>7,060.000                                 | <b>Quantity Available</b><br>9,550.000  | <b>Amount Available</b><br>\$312,858.00  |
| <b>* Value Change</b><br><input type="text" value="-\$10,000.00"/>                | <b>Unit</b><br>TON                      |  |
| <b>* Quantity Change</b><br><input type="text" value="5.000"/>                    | <b>Unit Price</b><br>\$32.760           |  |
| <b>* Begin Recovery On</b><br><input type="text" value="02/23/2023"/>             |   |  |
| <b>* Adjustment Effective Date</b><br><input type="text" value="02/23/2023"/>     |   |  |
| <b>New Value of Materials</b><br>\$130,000.00                                     |   |  |
| <b>New Quantity for Recovery</b><br>7,065.000                                     |   |  |
| <b>Current Recovery Rate</b><br>\$19.830  |   |  |
| <b>New Recovery Rate</b><br>\$18.401  |   |  |

[Help](#)

You will be returned to a Stockpile screen containing summary information for the stockpile just created. The updated stockpile information will be displayed. A list of modifications (Events) is shown at the bottom.

## Stockpile

Edit

---

**Stockpile**  
#1

**Associated Item**  
0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B

**Associated Fund Package**  
21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153

**Recovery Rate**  
\$18.401 per item unit (TON)

**Value of Materials**  
\$130,000.00

**Recovered Amount**  
\$0.00

**Remaining Value**  
\$130,000.00

**Begin Recovery On**  
02/23/2023

**Description**

---

### Events

| Date   | Action  | Quantity Change | Value Change | Quantity Remaining | Value Remaining |
|--|---------|-----------------|--------------|--------------------|-----------------|
| 02/23/2023   | Created | 7,060.000       | \$140,000.00 | 7,060.000          | \$140,000.00    |
| Begin Recovery On: 02/23/2023.   |         |                 |              |                    |                 |
| 02/23/2023   | Changed | 5.000           | -\$10,000.00 | 7,065.000          | \$130,000.00    |
| Effective Date: 02/23/2023. Value was changed from \$140,000.00 to \$130,000.00. Quantity was changed from 7,060.000 to 7,065.000. |         |                 |              |                    |                 |

Displaying all 2 events

To return to the main stockpile screen where all stockpiles are listed, either click on “Stockpiles” in the left menu or use the navigation path at the top to select “Stockpiles”.

Projects / 21-C021-153 / **Stockpiles** / Stockpile #1

21-C021-153 Under Construction  
STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

### Stockpile Edit

|   |  |
|---|--|
| <b>Stockpile</b><br>#1  | <b>Begin Recovery On</b><br>02/23/2023 |
| <b>Associated Item</b><br>0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B           | <b>Description</b>                     |
| <b>Associated Fund Package</b><br>21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 |  |
| <b>Recovery Rate</b><br>\$18.401 per item unit (TON)                              |  |
| <b>Value of Materials</b><br>\$130,000.00   |  |
| <b>Recovered Amount</b><br>\$0.00   |  |
| <b>Remaining Value</b><br>\$130,000.00  |  |

The main Stockpile screen will show all of the stockpiles that have been created.

### Stockpiles Add

| Stockpile                                  | Fund Package                                    | Value of Materials | Recovery | Remaining    |
|--|---|--------------------|----------|--------------|
| #1 2121-7425020 GRANULAR SHOULDERS, TYPE B | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 | \$130,000.00       | \$0.00   | \$130,000.00 |

**Recovery Progress**  
0.0%

Displaying 1 stockpile

# 9 - Time Limits

The Time Limits tab is where time charges (working day charges) are recorded. Weekly working day reports are generated based off of information input on this tab.

To access this section, click on the “Time Limits” button on the left menu.

The screenshot displays a software interface for project management. On the left is a vertical navigation menu with icons and labels: ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS (highlighted with a red circle), CHANGE ORDERS, and FORCE ACCOUNTS. The main content area is titled 'Projects / 75-C075-166' and shows details for project '75-C075-166' with a red 'Under Construction' tag. Below the project name is the text 'STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- November 15, 2022'. The 'Overview' section includes an 'Edit' button and several data cards: 'General Information' with expandable sections for Project (Work Type: PCC PAVEMENT WIDENING / PCC RESURFACING), Location (On K 49, from C38 N 1 miles to 231 ft. north of 200th St; In the city of Le Mars, on K49 from 18th Street SE south to 774 ft. south of 200th St.), and Management (Prime Contractor: GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID., Created By: Douglas Heeren). Other cards show 'Awarded Amount' and 'Authorized Amount' both at \$2,482,485.15, and 'Approved Changes' at \$0.00. A 'Description' card repeats the project details. An 'Amount Paid' card shows 'Amount paid so far' at \$0.00, with three progress indicators: 0% of your Awarded (\$2,482,485.15), 0% of your Authorized (\$2,482,485.15), and 0%.



You will be brought to the Time Limits screen. If there is only one time limit associated with the contract, there will only be one time limit shown on the screen (as shown in the screenshot below). If there are multiple time limits, multiple lines will show. To access the details for a specific time limit or to edit a time limit, select the blue description text of the desired limit.

Projects / 75-C075-166 / Time Limits

75-C075-166 Under Construction  
STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- Nove...

### Time Limits

| Time limit name  | Type         | Completed | Status      | Days remaining |
|--|--------------|-----------|-------------|----------------|
| Working Days, Late Start Date - 06/05/2023, Liquidated Damage Rate - 1,000 | Working Days | 0.0%      | Not Started | 95.0           |

Displaying 1 time limit

Now, a screen will appear with summary information for the specific time limit chosen.

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

Projects / 75-C075-166 / Time Limits / Working Days, Late Start Date - 06/05/2023, Liquidated Damage Rate - 1,000

75-C075-166 Under Construction  
STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- Nove...

### Time Limit Edit Cancel

**Primary**

| Description  | Type                   | Status                  |
|--|------------------------|-------------------------|
| Working Days, Late Start Date - 06/05/2023, Liquidated Damage Rate - 1,000 | Working Days           | Not Started             |
| Original Days Allowed  | Liquidated Damages/Day | Authorized Days Allowed |
| 95.0   | \$0.00                 | 95.0                    |

General information about time charges are displayed on this Time Limits screen. Informational fields shown include:

- **Description:** This will include the late start date or completion date and the liquidated damage value.
- **Type:** This is type of time limit(s) on the contract (i.e., Working Days, Calendar Days, Completion Date)
- **Status:** This is the status of the Time Limit (i.e., Not Started, In Progress, Completed)
- **Original Days Allowed:** Days allowed on the original contract.
- **Liquidated Damages/Day:** **If the project was let under DOT specifications, this field should show \$0.00.**
  - If there is a value in this field and the time limits on the contract are exceeded, Appia will automatically calculate the liquidated damages to be assessed for each overage day and will automatically deduct them from payments. This is NOT the way the Iowa DOT handles the assessment of liquidated damages. Rather the DOT requires that a change order be used to add an item for assessing liquidated damages. Therefore, in order to avoid the automatic calculation of damages and deduction of damages from payments, we enter a \$0.00 value in this field. Project set-up files generated by Local Systems will already have this value adjusted to \$0.00.
  - If Appia is being used for a project not using DOT specifications, the user can decide if they want to enter the liquidated damages in this field for automatic deduction on payments if time limits are exceeded.
- **Authorized Days Allowed:** Days allowed including any extensions of time limits added via change order.

## A. Entering Time Charges

In order to edit/enter time charges (day charges), click on the blue “Edit” button on the right side of the screen.

Projects / 75-C075-166 / Time Limits / Working Days, Late Start Date - 06/05/2023, Liquidated Damage Rate - 1,000

75-C075-166 Under Construction  
STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- Nove...

### Time Limit

Primary

|   |   |  |
|---|---|--|
| <b>Description</b><br>Working Days, Late Start Date - 06/05/2023,<br>Liquidated Damage Rate - 1,000 | <b>Type</b><br>Working Days             | <b>Status</b><br>Not Started           |
| <b>Original Days Allowed</b><br>95.0  | <b>Liquidated Damages/Day</b><br>\$0.00 | <b>Authorized Days Allowed</b><br>95.0 |

[Edit](#) [Cancel](#)

Clicking on the Edit button to edit time charges will bring you to this screen.

### Edit

Working Days

**Description**  
Working Days, Late Start Date - 06/05/2023, Liquidated Damage Rate - 1,000

|                               |   |
|-------------------------------|---|
| <b>Start Date</b>             | <b>Expected End Date</b>                    |
| <b>Days Charged</b><br>0.0    | <b>Liquidated Damages/Day</b><br>\$0.00     |
| <b>Days Remaining</b><br>95.0 | <b>Liquidated Damages to Date</b><br>\$0.00 |

**Primary Deadline?**  
 YES

**Work Completed?**  
 NO

[Save](#) [Cancel](#)

< **January** >  
2024

| SUN | MON | TUE | WED | THU | FRI | SAT |
|-----|-----|-----|-----|-----|-----|-----|
|     | 1   | 2   | 3   | 4   | 5   | 6   |
| 7   | 8   | 9   | 10  | 11  | 12  | 13  |
| 14  | 15  | 16  | 17  | 18  | 19  | 20  |
| 21  | 22  | 23  | 24  | 25  | 26  | 27  |
| 28  | 29  | 30  | 31  |     |     |     |

Summary information is shown on left side of this screen. “Primary deadline” should be marked “Yes” unless the project has specific site times (phases) set up which are not on the critical path to completing the project and that specific site time is the one to which time charges are being made.

“Work Completed” should be marked “No” until the project has been finalized and retainage has been released. This toggle only needs to be switched to “Yes” when the user is ready to undergo Appia’s final voucher process to complete a project and move it out of the “Under Construction” status to the “Completed” status. For guidance on whether or not to use Appia’s Final Voucher process for the actual final payment, see the [Final Payment](#) section of these instructions, and for instructions on working through Appia’s final voucher process, see the [Appia’s Final Voucher \(Payment Process\)](#) section of these instructions.

To enter a time charge for a day, click on the desired date on the calendar view.

**Edit** Save Cancel

**Working Days**

**Description**  
Working Days, Late Start Date 04/01/21, Liquidated Damages \$1,500.00

**Start Date** 03/02/2021 **Expected End Date** 03/12/2021

**Days Charged** 8.5 **Liquidated Damages/Day** \$0.00

**Days Remaining** 131.5 **Liquidated Damages to Date** \$0.00

**Primary Deadline?**  YES

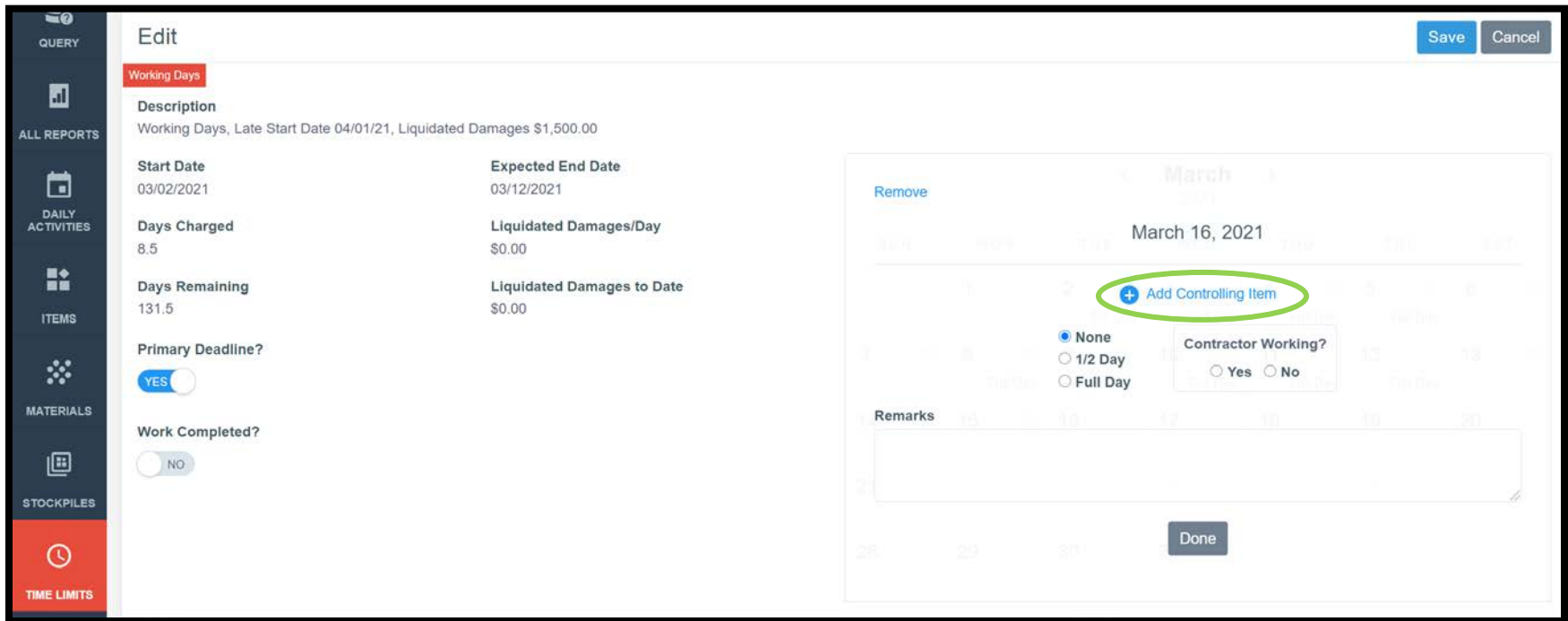
**Work Completed?**  NO

**March 2021**

| SUN | MON           | TUE           | WED            | THU            | FRI            | SAT |
|-----|---------------|---------------|----------------|----------------|----------------|-----|
|     | 1             | 2<br>1/2 Day  | 3<br>Full Day  | 4<br>Full Day  | 5<br>Full Day  | 6   |
| 7   | 8<br>Full Day | 9<br>Full Day | 10<br>Full Day | 11<br>Full Day | 12<br>Full Day | 13  |
| 14  | 15            | 16            | 17             | 18             | 19             | 20  |
| 21  | 22            | 23            | 24             | 25             | 26             | 27  |
| 28  | 29            | 30            | 31             |                |                |     |

Note: No time charges can be entered on a date before the "Notice to Proceed" date or on dates in the future.

A data entry box will appear in place of the calendar view.



In the data entry box enter the controlling item by clicking on the “Add Controlling Item” button. The controlling item is the item that is most controlling the progress of the work on the project on that date. In other words, select the item which is currently controlling the critical path. Clicking on the “Add Controlling Item” link will bring up a screen showing all bid items on the contract as shown below. Select the desired item.

When the item is selected, a green circle with a check mark will appear on the right side of the line. When you are satisfied that the correct item has been selected, click on the blue “Add Items” button at the bottom.

The screenshot shows a modal window titled "Add Item(s) to Section" overlaid on a background interface. The modal has a search bar at the top with the placeholder text "Search for Item ID, Description and Unit" and a "Search" button. Below the search bar is a table with three columns: "Item ID", "Description", and "Unit". The table contains the following items:

| Item ID      | Description                              | Unit |
|--------------|--|------|
| 2101-0850001 | CLEARING AND GRUBBING                    | ACRE |
| 2102-2710070 | EXCAVATION, CLASS 10, ROADWAY AND BORROW | CY   |
| 2104-2710020 | EXCAVATION, CLASS 10, CHANNEL            | CY   |
| 2105-8425015 | TOPSOIL, STRIP, SALVAGE AND SPREAD       | CY   |
| 2110-3825010 | GRANULAR MATERIAL                        | TON  |
| 2110-8200000 | CONSTRUCTION OF SOIL AGGREGATE SUBBASE   | MILE |
| 2121-7425020 | GRANULAR SHOULDERS, TYPE B               | TON  |
| 2123-7450000 | SHOULDER CONSTRUCTION, EARTH             | STA  |
| 2214-5145150 | PAVEMENT SCARIFICATION                   | SY   |

The second row of the table is highlighted, and a green circle with a checkmark is placed to the right of the "CY" unit. At the bottom right of the modal, there are two buttons: "Add Items" (highlighted with a green circle) and "Cancel".

Your selection should now be shown where the “Add Controlling Item” option was previously shown. If you chose the wrong item, click on the red circle with the “x” to the right of the item name and choose a different item.

**Edit** Save Cancel

**Working Days**

**Description**  
Working Days, Late Start Date 04/01/21, Liquidated Damages \$1,500.00

**Start Date** 03/02/2021      **Expected End Date** 03/12/2021

**Days Charged** 8.5      **Liquidated Damages/Day** \$0.00

**Days Remaining** 131.5      **Liquidated Damages to Date** \$0.00

**Primary Deadline?**  
 YES  NO

**Work Completed?**  
 YES  NO

Remove

March 2021

March 16, 2021

|              |  |    |  |
|--------------|--|----|--|
| 2102-2710070 | EXCAVATION, CLASS 10, ROADWAY AND BORROW | CY |  |
|--------------|--|----|--|

None  
 1/2 Day  
 Full Day

**Contractor Working?**  
 Yes  No

**Remarks**

Done



Next, for working day contracts, select the share of the day to be charged (None, ½ Day, Full Day) by clicking the appropriate radio button to the left of the time charge amount. Also, click the appropriate radio button to indicate whether the contractor was on site working or not.

**Edit** Save Cancel

**Working Days**

**Description**  
Working Days, Late Start Date 04/01/21, Liquidated Damages \$1,500.00

|                                 |   |
|---------------------------------|---|
| <b>Start Date</b><br>03/02/2021 | <b>Expected End Date</b><br>03/12/2021      |
| <b>Days Charged</b><br>8.5      | <b>Liquidated Damages/Day</b><br>\$0.00     |
| <b>Days Remaining</b><br>131.5  | <b>Liquidated Damages to Date</b><br>\$0.00 |

**Primary Deadline?**  
 YES  NO

**Work Completed?**  
 YES  NO

**Calendar View:** March 2021  
March 16, 2021

Remove

2102-2710070 EXCAVATION, CLASS 10, ROADWAY AND BORROW CY

None  
 1/2 Day  
 Full Day

**Contractor Working?**  
 Yes  No

Remarks

Done

Last, enter a remark. The remarks section should **always be filled out for days with 0 or ½ day charges**. For those days with 0 or ½ day charges, a **“Reason for Delay”** must be shown in the remarks field. Additional information can be added as well if desired. **Failure to enter a remark on days with zero charges (None) will cause the recording of the day to be omitted from the Time Limit (Weekly Working Day) Report.**

The screenshot displays a software interface for editing a 'Working Days' entry. The interface is divided into a sidebar on the left and a main content area on the right. The sidebar contains navigation icons and labels for 'QUERY', 'ALL REPORTS', 'DAILY ACTIVITIES', 'ITEMS', 'MATERIALS', 'STOCKPILES', and 'TIME LIMITS'. The main content area is titled 'Edit' and features a 'Working Days' section with the following fields:

- Description:** Working Days, Late Start Date 04/01/21, Liquidated Damages \$1,500.00
- Start Date:** 03/02/2021
- Expected End Date:** 03/12/2021
- Days Charged:** 8.5
- Liquidated Damages/Day:** \$0.00
- Days Remaining:** 131.5
- Liquidated Damages to Date:** \$0.00
- Primary Deadline?:** YES (toggle)
- Work Completed?:** NO (toggle)

A calendar view for March 2021 is shown, with a date selected. The 'Remarks' field is highlighted with a green circle and contains the text 'Reason for Delay: Free Winter Work'. The interface also includes a 'Remove' button, a 'Contractor Working?' section with radio buttons for 'None', '1/2 Day', and 'Full Day', and a 'Done' button.

“Reason for Delay” remarks should always be entered for Saturdays and Sundays as well when no day has been charged. In those cases, the “Reason for Delay” can be listed as “Weekend” or “Saturday”/ “Sunday”.

When you are done entering the charge for the day, click the gray “Done” button.

**Edit** Save Cancel

**Working Days**

**Description**  
Working Days, Late Start Date 04/01/21, Liquidated Damages \$1,500.00

**Start Date** 03/02/2021 **Expected End Date** 03/12/2021

**Days Charged** 8.5 **Liquidated Damages/Day** \$0.00

**Days Remaining** 131.5 **Liquidated Damages to Date** \$0.00

**Primary Deadline?**  YES

**Work Completed?**  NO

**Remove** March

March 16, 2021

2102-2710070 EXCAVATION, CLASS 10, ROADWAY AND BORROW CY ×

None  1/2 Day  Full Day

**Contractor Working?**  Yes  No

**Remarks**  
Reason for Delay: Free Winter Work

**Done**

This will return you to the calendar view. If a charge of either ½ day or full day was entered, the charge will show on the calendar. If “None” was selected for the day charge, no charge will appear on the calendar. However, if an entry was made in the “Remarks” section for a day, the calendar will show a notepad icon to indicate an entry was made.

| SUN | MON           | TUE           | WED            | THU            | FRI            | SAT |
|-----|---------------|---------------|----------------|----------------|----------------|-----|
|     | 1             | 2<br>1/2 Day  | 3<br>Full Day  | 4<br>Full Day  | 5<br>Full Day  | 6   |
| 7   | 8<br>Full Day | 9<br>Full Day | 10<br>Full Day | 11<br>Full Day | 12<br>Full Day | 13  |
| 14  | 15            | 16            | 17             | 18             | 19             | 20  |
| 21  | 22            | 23            | 24             | 25             | 26             | 27  |
| 28  | 29            | 30            | 31             |                |                |     |

\*\*\*See next page before navigating away from the current screen.

When all time limit entries have been made, be sure to click the blue “Save” button in the top, right corner before navigating away from this screen. Failure to click the “Save” button will result in the loss of all time limit entries made while you were in the Time Limits tab.

**Edit**

**Working Days**

**Description**  
Working Days, Late Start Date 04/01/21, Liquidated Damages \$1,500.00

**Start Date**  
03/02/2021

**Expected End Date**  
03/12/2021

**Days Charged**  
8.5

**Liquidated Damages/Day**  
\$0.00

**Days Remaining**  
131.5

**Liquidated Damages to Date**  
\$0.00

**Primary Deadline?**  
 YES

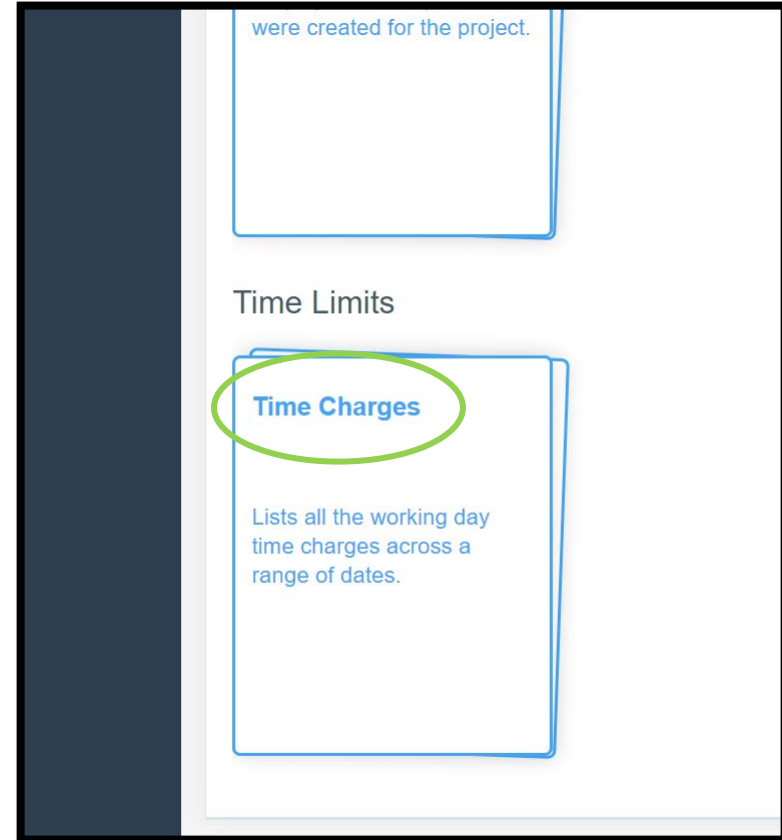
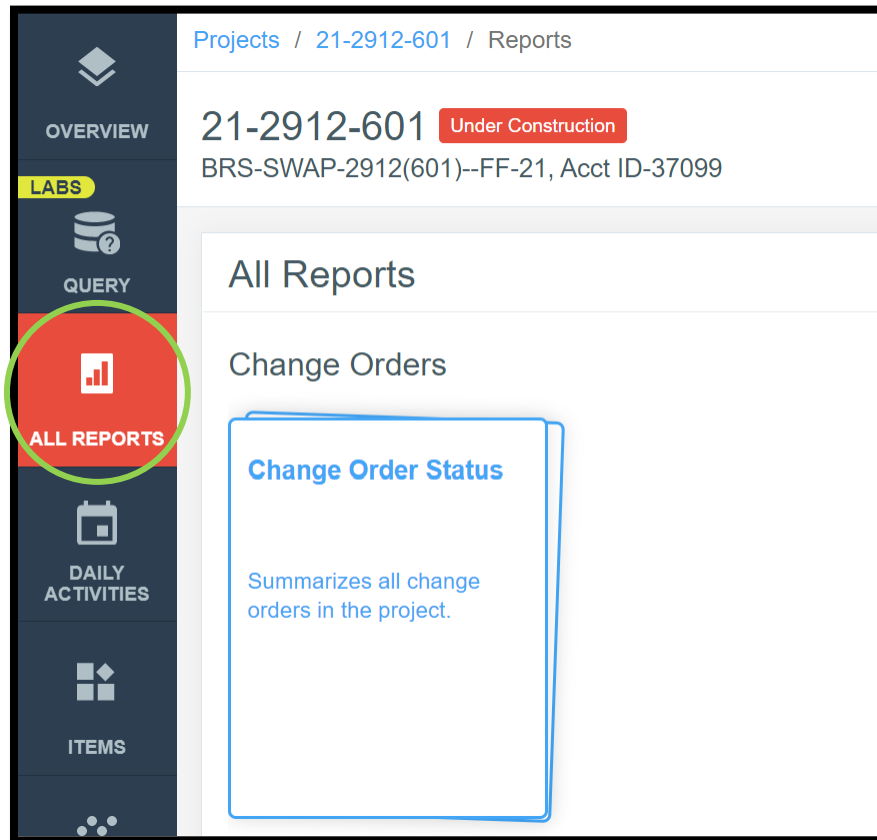
**Work Completed?**  
 NO

**March 2021**

| SUN           | MON           | TUE           | WED            | THU            | FRI            | SAT            |
|---------------|---------------|---------------|----------------|----------------|----------------|----------------|
|               | 1             | 2<br>1/2 Day  | 3<br>Full Day  | 4<br>Full Day  | 5<br>Full Day  | 6<br>Full Day  |
| 7<br>Full Day | 8<br>Full Day | 9<br>Full Day | 10<br>Full Day | 11<br>Full Day | 12<br>Full Day | 13<br>Full Day |
| 14            | 15            | 16            | 17             | 18             | 19             | 20             |
| 21            | 22            | 23            | 24             | 25             | 26             | 27             |
| 28            | 29            | 30            | 31             |                |                |                |

## B. Generating a Time Limit Report (Weekly Working Day Report)

To generate a Weekly Working Day Report, navigate to the All Reports tab on the left menu. Scroll down to find the “Time Charges” report. Click on the “Time Charges” report.



Clicking on the “Time Charges” Report will cause the following screen to appear.

On this screen, make sure you:

- Select the Start Date and End Date corresponding to the week for which you want to generate the report. The Start Date should be a Sunday, and the End Date should be a Saturday.
- Select “Yes” for Show Remarks.
  - Selecting yes will show any zero-charge day on the report which had an entry in the “Remarks” field as noted in the preceding section of these instructions.
- Select “Yes” for Show Contractor Working.
  - Selecting yes does not indicate that the contractor was working every day the report covers. Rather, it tells Appia to include the information for that field on the report. If marked yes, the report will show the individual entries you made for each date showing whether the contractor was working or not.

The screenshot shows the 'Time Charges' report configuration interface. On the left is a dark sidebar with icons for 'QUERY', 'ALL REPORTS', and 'DAILY ACTIVITIES'. The main area has a title 'Time Charges' and a 'Run Report' button in the top right. Below the title are two date input fields: '\* Start Date' (03/07/2021) and '\* End Date' (03/13/2021). To the right of these fields are two radio button options: 'Show Remarks?' (selected 'Yes') and 'Show Contractor Working?' (selected 'Yes'). A blue 'Run Report' button and a grey 'Cancel' button are in the top right corner.

When the appropriate dates have been entered and report choices marked, click on the blue “Run Report” button in the top, right corner.

This screenshot is identical to the previous one, showing the 'Time Charges' report configuration. The 'Run Report' button in the top right corner is now highlighted with a blue border, indicating it is the button to be clicked.

A new window will open in your internet browser with the generated report. This report can be downloaded and saved into the desired location. Once saved, it can be uploaded to Doc Express. (Depending on the browser you are using, this screen may look different.)

The screenshot shows a web browser window with the address bar displaying 'time\_charges'. The browser interface includes a navigation menu on the left, a toolbar at the top with page navigation (1/2), zoom (100%), and print/download icons. The main content area displays a report for 'Iowa Local Systems DEMO ACCOUNT' with the following details:

**IOWADOT** GETTING YOU THERE  
**Iowa Local Systems DEMO ACCOUNT**  
**Time Charges for Working Days**  
 21-2912-601


---

|                                      |   |
|--------------------------------------|---|
| <b>Description</b>                   | BRS-SWAP-2912(601)--FF-21, Acct ID-37099  |
| <b>Location</b>                      | On B53 Over LITTLE SIOUX RIVER S25 T95 R36                                      |
| <b>Awarded Project Amount</b>        | \$2,218,553.45  |
| <b>Awarded Project % Complete</b>    | 0.000%  |
| <b>Authorized Project Amount</b>     | \$2,218,553.45  |
| <b>Authorized Project % Complete</b> | 0.000%  |
| <b>Notice to Proceed Date</b>        | 10/27/2020  |
| <b>Construction Start Date</b>       |   |
| <b>Prime Contractor</b>              | GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.<br>5784 HIGHWAY 175<br>IDA GROVE, IA |
| <b>Dates Covered</b>                 | 03/07/2021 to 03/13/2021  |
| <b>Time Complete To Date</b>         | 8.5 Days (6.071%)   |
| <b>Time Complete In Period</b>       | 5.0 Days (3.571%)   |
| <b>Total Authorized Days</b>         | 140.0 Days  |
| <b>Total Days Remaining</b>          | 131.5 Days  |

The left sidebar contains two thumbnails labeled '1' and '2', representing different views or pages of the report.



A sample report is shown here. Note that all remarks, controlling items, and contractor working choices are shown with each date's entry.

|  <b>Iowa Local Systems DEMO ACCOUNT</b><br>Time Charges for Working Days<br>21-2912-601 |   |
|--|---|
| <b>Description</b>   | BRS-SWAP-2912(601)--FF-21, Acct ID-37099  |
| <b>Location</b>  | On B53 Over LITTLE SIOUX RIVER S25 T95 R36                                      |
| <b>Awarded Project Amount</b>  | \$2,218,553.45  |
| <b>Awarded Project % Complete</b>  | 0.000%  |
| <b>Authorized Project Amount</b>   | \$2,218,553.45  |
| <b>Authorized Project % Complete</b>   | 0.000%  |
| <b>Notice to Proceed Date</b>  | 10/27/2020  |
| <b>Construction Start Date</b>   |   |
| <b>Prime Contractor</b>  | GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.<br>5784 HIGHWAY 175<br>IDA GROVE, IA |
| <b>Dates Covered</b>   | 03/07/2021 to 03/13/2021  |
| <b>Time Complete To Date</b>   | 8.5 Days (6.071%)   |
| <b>Time Complete In Period</b>   | 5.0 Days (3.571%)   |
| <b>Total Authorized Days</b>   | 140.0 Days  |
| <b>Total Days Remaining</b>  | 131.5 Days  |

|                              |                           |
|------------------------------|---------------------------|
| Time Charges:<br>21-2912-601 | 04/06/2021<br>Page 1 of 2 |
|------------------------------|---------------------------|

**Time Limit: Working Days, Late Start Date 04/01/21, Liquidated Damages \$1,500.00**

Sunday 03/07/2021 - Saturday 03/13/2021

| Date  | Day of the Week | Days Charged |
|---|-----------------|--------------|
| 03/07/2021  | Sunday          | 0.0          |
| <b>Controlling Item:</b> 2102-2710070 EXCAVATION, CLASS 10, ROADWAY AND BORROW CY |                 |              |
| <b>Contractor Working:</b> No   |                 |              |
| <b>Remarks:</b> Reason for Delay: Weekend (Sunday)                                |                 |              |
| 03/08/2021  | Monday          | 1.0          |
| <b>Controlling Item:</b> 2102-2710070 EXCAVATION, CLASS 10, ROADWAY AND BORROW CY |                 |              |
| <b>Contractor Working:</b> Yes  |                 |              |
| <b>Remarks:</b> Reason for Delay: None  |                 |              |
| 03/09/2021  | Tuesday         | 1.0          |
| <b>Controlling Item:</b> 2102-2710070 EXCAVATION, CLASS 10, ROADWAY AND BORROW CY |                 |              |
| <b>Contractor Working:</b> Yes  |                 |              |
| 03/10/2021  | Wednesday       | 1.0          |
| <b>Controlling Item:</b> 2102-2710070 EXCAVATION, CLASS 10, ROADWAY AND BORROW CY |                 |              |
| <b>Contractor Working:</b> Yes  |                 |              |
| 03/11/2021  | Thursday        | 1.0          |
| <b>Controlling Item:</b> 2102-2710070 EXCAVATION, CLASS 10, ROADWAY AND BORROW CY |                 |              |
| <b>Contractor Working:</b> Yes  |                 |              |
| 03/12/2021  | Friday          | 1.0          |
| <b>Controlling Item:</b> 2501-0201057 PILES, STEEL, HP 10 X 57 LF                 |                 |              |
| <b>Contractor Working:</b> Yes  |                 |              |
| 03/13/2021  | Saturday        | 0.0          |
| <b>Controlling Item:</b> 2501-0201057 PILES, STEEL, HP 10 X 57 LF                 |                 |              |
| <b>Contractor Working:</b> No   |                 |              |
| <b>Remarks:</b> Reason for Delay: Weekend   |                 |              |
| <b>Total This Period:</b>   |                 | <b>5.0</b>   |
| <b>Total To Date:</b>   |                 | <b>8.5</b>   |

|                              |                           |
|------------------------------|---------------------------|
| Time Charges:<br>21-2912-601 | 04/06/2021<br>Page 2 of 2 |
|------------------------------|---------------------------|

# 10 - Change Orders

The Change Order tab is where change orders are created and approved. Multiple change order drafts can be worked on concurrently.

To access the Change Orders section, click on the Change Order button in the left menu.

The screenshot displays a software interface for managing change orders. On the left, a dark sidebar contains navigation buttons: MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS (highlighted with a green circle), PUNCH LIST, and PAYMENTS. The main content area is divided into sections: Location (On M27, from B40 North 6.0 Miles to City of Everly; On B24, from NE corner 16-96-38 W 4 miles to SW corner 18-96-38), Management (Prime Contractor: CEDAR VALLEY CORP., LLC; Project Manager: Niki Stinn; Managing Office: Local Systems; Created By: Douglas Heeren), Letting Date (November 13, 2022), Amount Paid (Amount paid so far: \$0.00; 0% of your Awarded \$4,553,445.96; 0% of your Authorized \$4,553,445.96; 0% of your Approv Paymer \$0.00), Important Dates (Date Created: Dec 5, 2022; Notice to Proceed: Dec 20, 2022), and Progress (Time Complete: 0 Days; Time Remaining: 80 Days; 0% progress bar).

## A. General Change Order Information

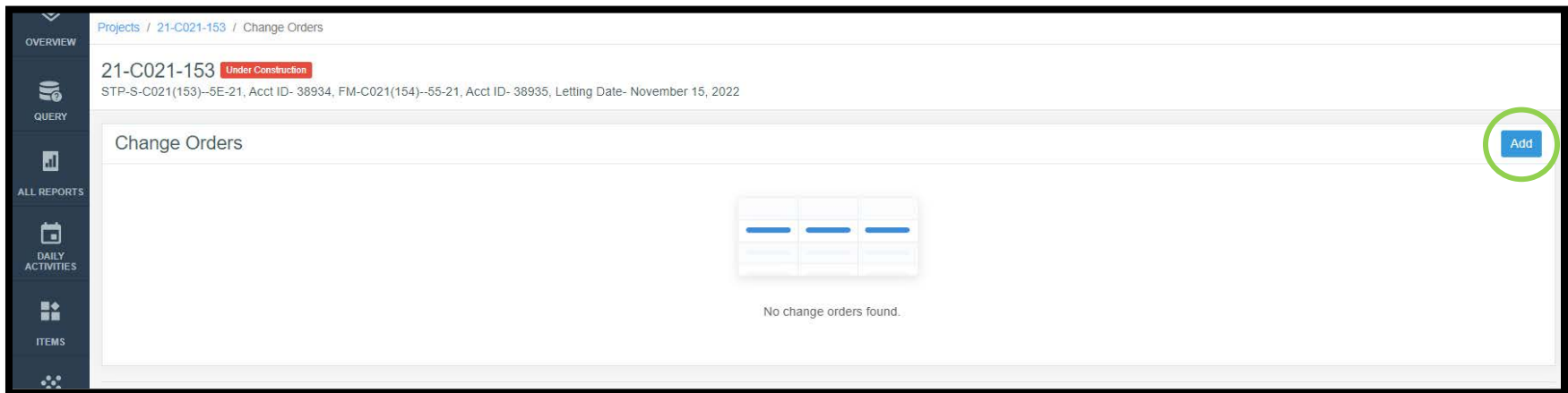
Clicking on the Change Order button in the left menu will bring you to this screen. If you have not yet created any change orders, a message saying “No change orders found” will display. Conversely, if you have already created a change order(s), it will be displayed on the screen.

**Note: Before creating ANY change orders, ensure you have created the Change Order Custom Fields in your Reference Data, as required by Local Systems. For guidance on creating the custom fields, refer Section to 20, subsection B. Editing Lists in the [Appia Project Creation & Account Management Instructions](#).**

**Note: If multiple projects are tied in one contract, create a separate change order for each project.**

Note: Refer to Section 13 (default settings) or Section 5 (project-specific settings) of the [Appia Project Creation & Account Management Instructions](#) for guidance on creating signature lines for change orders. For projects let through the Iowa DOT, do NOT have the Contractor, Project Engineer, or Person in Responsible Charge wet-sign a change order document. Those signatures must take place electronically in Doc Express.

To create a new change order, click the blue “Add” button in the top, right corner.



To edit an existing change order, click the blue circle with the pencil on the right end of the line containing the desired change order.

| Date       | Status | Amount   | Type  | Summary | No. |
|------------|--------|----------|---|---------|-----|
| 02/21/2023 | Draft  | \$249.95 | Non-Significant - Federal-aid Participating |         | 1   |

Clicking on either the “Add” or “Edit (pencil)” button will bring you to the screen shown below. (The “Edit” screen will include tabs across the top: “Overview”, “Quantities”, “New Items”, “Time Limit Changes”, “New Time Limits”, and “Attachments”.)

Change Order Type: \*\* None Selected \*\*

Summary: [Text Field]

Description: [Rich Text Editor]

B - Reason for change: [Rich Text Editor]

Note: The Change Order Custom Fields are fields B through E.

## B. [Change Order Descriptive Information Screen \(Initial Creation\) / Overview Tab \(Edit Mode\)](#)

In this screen pictured above, there are multiple fields of information that need to be populated. Refer to [I.M. 6.000, Attachment D](#), section 2.36 for more complete guidance on change orders.

- Change Order Type: This is a pull-down menu that allows you to select type of change order applicable to the situation.
  - Refer to [I.M. 6.000, Attachment D](#), section 2.36 to determine Significant/Non-Significant (Substantial/Non-Substantial) status.
  - Refer to the Final Highway Funding Sources document found the Contract Documents Drawer in Doc Express to determine Participating/Non-Participating status. If you are unsure, please contact your Local Systems Field Technician.
  - When both participating and non-participating items are included on the change order, choose a Participating type.
  - When a non-participating item is included on a change order, before going any further, ensure that a non-participating funding package exists. If a non-participating funding package is not present, add one. Refer to Section 4 of the [Appia Project Creation & Account Management Instructions](#) for guidance on creating funding packages.
  - Current choices for change order types include:
    - Non-significant – Federal-Aid Participating
    - Non-significant – Non-Participating
    - Non-significant – Swap Participating
    - Significant – Federal-aid Participating
    - Significant – Non-Participating
    - Significant – Swap Participating



The screenshot shows a software interface for creating a new change order. On the left is a dark sidebar with navigation options: 'QUERY', 'ALL REPORTS', and 'DAILY ACTIVITIES'. The main area is titled 'New' and contains a 'Change Order Type' dropdown menu with the text '\*\* None Selected \*\*'. Below this is a 'Description' field with a rich text editor toolbar showing options for font size (14px), bold (B), italic (I), underline (U), and other text formatting tools. A green oval highlights the 'Change Order Type' dropdown menu.

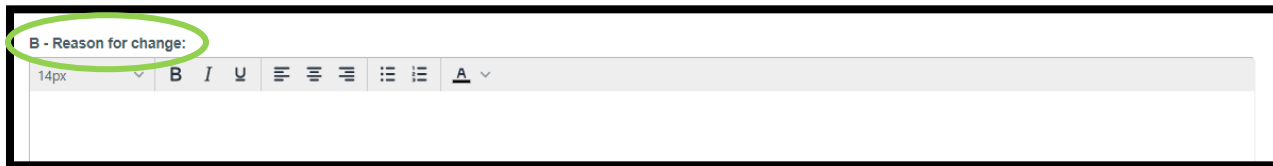
- Summary: This field may be left blank.

A screenshot of a text input field with a black border. The word "Summary" is written in the top left corner of the field and is circled in green.

- Description: Enter a description of the modification to be made.
  - Refer to [I.M. 6.000, Attachment D](#), section 2.36. See Section A of the “Preparation of Change Order (Form 831240 or Appia Change Order)” subsection.
    - Check the contract to verify contract item line numbers. For existing items, use the original line number, not a 7000 number.
    - Look at any previous change orders to check 8000 line numbers for any previously added new items. Continue numbering sequentially, starting at 8001. If there are multiple projects included in the contract, each project should add new items starting at 8001 but should include an alphabetical supplement to the number (example: 8001a, 8001b, etc.)

A screenshot of a rich text editor field with a black border. The word "Description" is written in the top left corner of the field and is circled in green. The editor includes a toolbar with icons for bold, italic, underline, text color, background color, bulleted list, numbered list, and link.

- B – Reason for change: Enter a description of the reason for the modification(s) to the contract.
  - Refer to [I.M. 6.000, Attachment D](#), section 2.36. See Section B of the “Preparation of Change Order (Form 831240 or Appia Change Order)” subsection.

A screenshot of a rich text editor field with a black border. The text "B - Reason for change:" is written in the top left corner of the field and is circled in green. The editor includes a toolbar with icons for bold, italic, underline, text color, background color, bulleted list, numbered list, and link.

- C – Settlement of cost(s) of change as follows with items addressed in Sections F and/or G: Explain the payment method associated with the modification(s) (ex. Contract Unit Price, Agreed Unit Price, Agreed Lump sum, Force Account, Specified Rate, Mutual Benefit).
  - Refer to [I.M. 6.000, Attachment D](#), section 2.36. See Section C of the “Preparation of Change Order (Form 831240 or Appia Change Order)” subsection.

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

14px

B I U = - = : : A

- D – Justification for cost(s): Provide rationale/justification for accepting the proposed costs associated with the modification(s).
  - Refer to [I.M. 6.000, Attachment D](#), section 2.36. See Section D of the “Preparation of Change Order (Form 831240 or Appia Change Order)” subsection.

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

14px

B I U = - = : : A



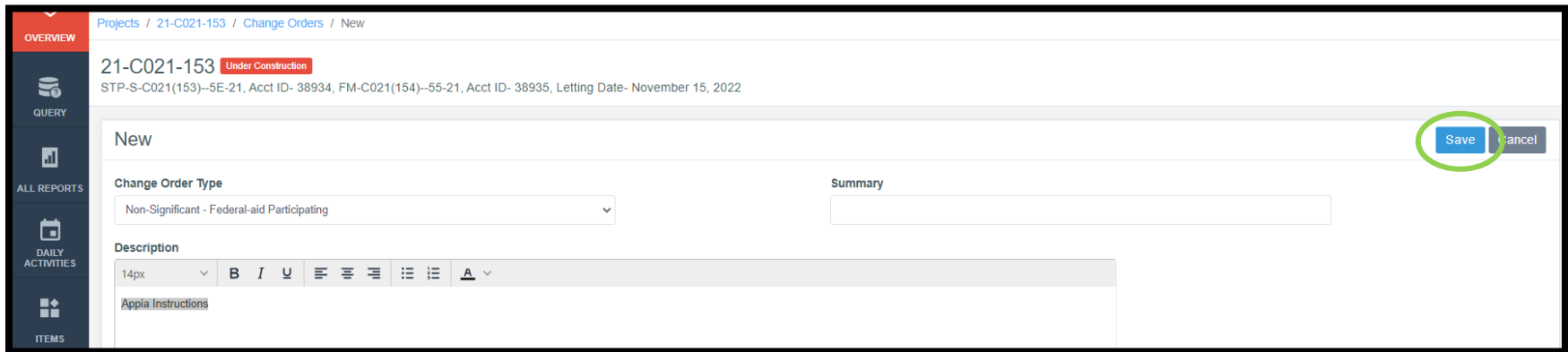
- E – Contract time adjustment: Provide an explanation of the impact of the proposed modification to the contract’s time limits. Also, explain how the time adjustments, if applicable, were determined.
  - Choices for impacts are:
    - No Working Days Added
    - Working Days Added
    - Unknown at this time – This option should be avoided unless impacts to time cannot be quantified until after the work is complete.
  - Refer to [I.M. 6.000, Attachment D](#), section 2.36. See Section E of the “Preparation of Change Order (Form 831240 or Appia Change Order)” subsection.



E - Contract time adjustment:

14px B I U [align icons] [list icons] A [font color icon]

When information has been entered in all of the fields, click the blue “Save” button in the top, right corner.



Projects / 21-C021-153 / Change Orders / New

21-C021-153 Under Construction  
STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

New Save Cancel

Change Order Type: Non-Significant - Federal-aid Participating

Summary: [empty field]

Description: 14px B I U [align icons] [list icons] A [font color icon]  
Appia Instructions

After clicking the “Save” button, you will be directed to the screen shown below. At the top, the descriptive information entered on the previous screen is displayed. This view shows the current status of the change order. At the bottom, numerical values for change order modifications are entered.

Projects / 21-C021-153 / Change Orders / Change Order #1

21-C021-153 Under Construction Submit For Approval Actions Reports

STP-S-C021(153)-SE-21, Acct ID- 38934, FM-C021(154)-55-21, Acct ID- 38935, Letting Date- November 15, 2022

### Change Order Edit

**Date Created**  
02/21/2023

**Summary**

**Description**  
Appia Instructions

**B - Reason for change:**  
Appia Instructions

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

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

**E - Contract time adjustment:**  
Appia Instructions

**Status**  
Draft

**Type**  
Non-Significant - Federal-aid Participating

**Total Proposed Amount**  
\$0.00

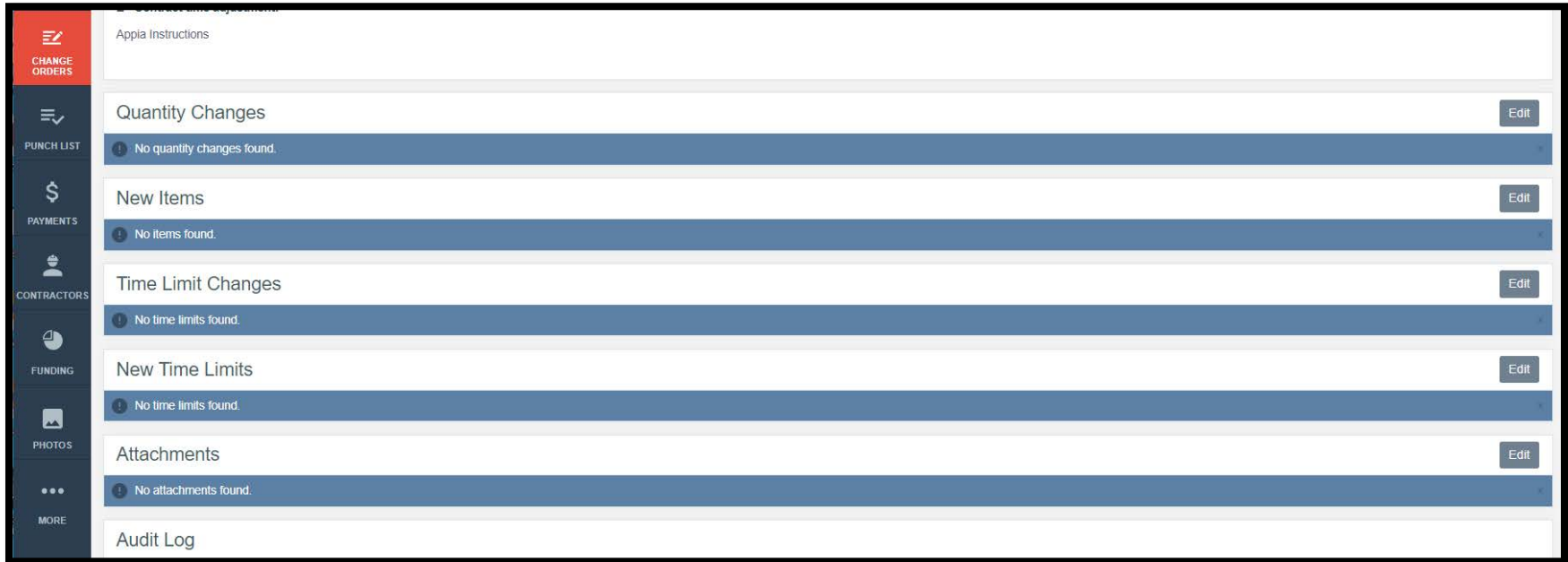
← Information added on previous screen

### Quantity Changes Edit

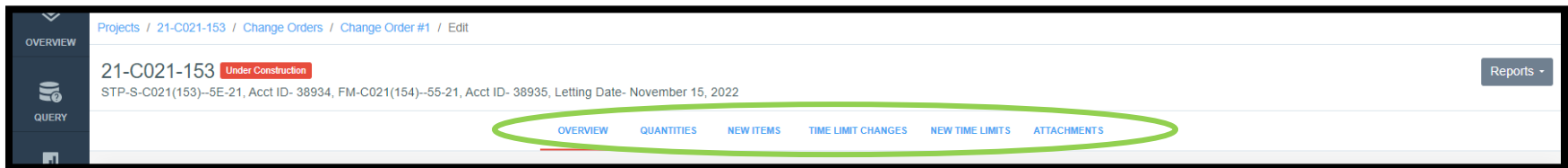
No quantity changes found

### C. Numerical Values Change Order Entry Screen

Below the descriptive information are options for “Quantity Changes”, “New Items”, “Time Limit Changes”, “New Time Limits”, and “Attachments”. Each of these options is detailed below. (If editing an existing change order, these options will be listed in tabs near the top of the screen.)

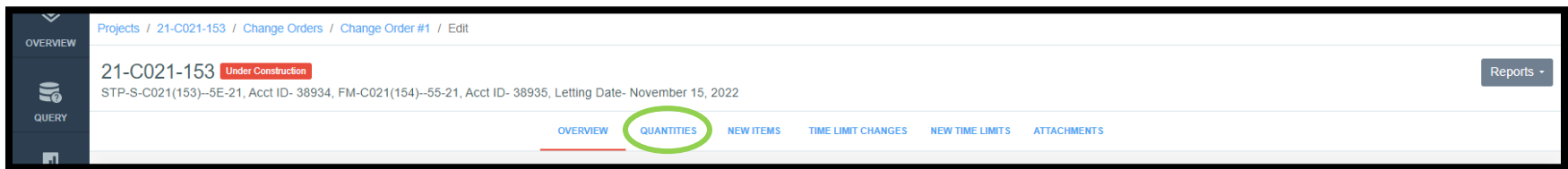


#### View of tabs in edit mode

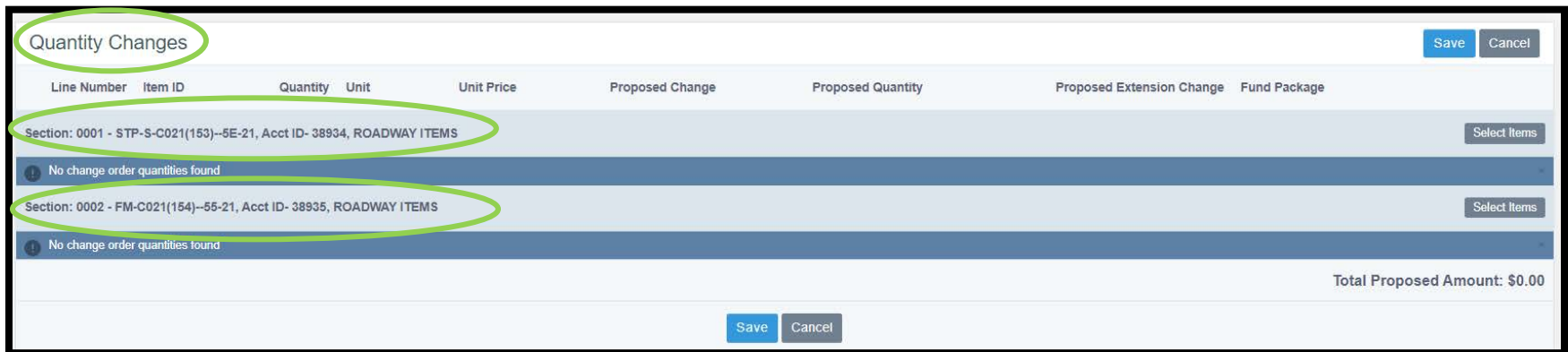


### 1) Quantity Changes / Quantities Tab (Edit Mode)

Use Quantity Changes when making a change to an existing contract item. To enter a quantity change, click the gray “Edit” button on the right end of the Quantity Changes line. (If in edit mode, click on the “Quantities” tab near the top, center of the screen.)



This will bring you to the Quantity Changes data entry screen. If there are multiple sections in your Appia project (different tied projects in the contract or different divisions within a contract), you will see lines for each independent section as shown below. If only one section is present on the contract, only one section will be displayed.



To select the item(s) that is being modified in the change order, click the gray “Select Items” button on the right end of the line. For Appia projects with multiple sections, be sure to click the “Select Items” button on the line that corresponds with the section containing the already-existing item. You may add items to each section within the same change order if needed. You may add items to multiples sections within the same change order if needed only if the sections are divisions under one project number (accounting ID). Do NOT add items to multiple sections in one change order if the sections represent separate projects tied together in one contract (separate accounting IDs).

The screenshot displays a web interface titled "Quantity Changes" with a table of sections. The table has columns for Line Number, Item ID, Quantity, Unit, Unit Price, Proposed Change, Proposed Quantity, Proposed Extension Change, and Fund Package. Two sections are visible, each with a "Select Items" button circled in green. The first section is "0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS" and the second is "0002 - FM-C021(154)--5E-21, Acct ID- 38935, ROADWAY ITEMS". Both sections show a message: "No change order quantities found". At the bottom right, it says "Total Proposed Amount: \$0.00". There are "Save" and "Cancel" buttons at the top right and bottom center.

| Line Number   | Item ID | Quantity | Unit | Unit Price | Proposed Change | Proposed Quantity | Proposed Extension Change | Fund Package |
|---|---------|----------|------|------------|-----------------|-------------------|---------------------------|--------------|
| Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS |         |          |      |            |                 |                   |                           |              |
| No change order quantities found                                      |         |          |      |            |                 |                   |                           |              |
| Section: 0002 - FM-C021(154)--5E-21, Acct ID- 38935, ROADWAY ITEMS    |         |          |      |            |                 |                   |                           |              |
| No change order quantities found                                      |         |          |      |            |                 |                   |                           |              |

Total Proposed Amount: \$0.00

When "Select Items" is chosen, the window shown below will pop up. It contains a list of the items in that section already existing in the contract. You can search for a particular item in the search bar, or you can use the scroll bar on the right side (or scroll with your mouse) to scroll through the items. If there are many items on the contract, there may be multiple pages of items. An option to navigate to another page can be found by scrolling to the very bottom of the list. To select an item, simply click on the line containing the item's information.

**Change Project Items**

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

| Line Number  | Item ID      | Description   | Unit | Authorized | Placed | Remaining  |
|--|--------------|---|------|------------|--------|------------|
| <b>Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS</b> |              |   |      |            |        |            |
| 0010   | 2110-3825010 | GRANULAR MATERIAL   | TON  | 760.000    | 0.000  | 760.000    |
| 0020   | 2121-7425020 | GRANULAR SHOULDERS, TYPE B  | TON  | 9,550.000  | 0.000  | 9,550.000  |
| 0030   | 2214-5145150 | PAVEMENT SCARIFICATION  | SY   | 74,947.000 | 0.000  | 74,947.000 |
| 0040   | 2301-0690220 | BRIDGE APPROACH, SECONDARY ROADS  | SY   | 97.800     | 0.000  | 97.800     |
| 0050   | 2301-1032090 | STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, CLASS C, CLASS 2 DURABILITY, 9 IN. | SY   | 2,813.000  | 0.000  | 2,813.000  |
| 0060   | 2301-9091000 | RUMBLE STRIP PANEL (PCC SURFACE)  | EACH | 6.000      | 0.000  | 6.000      |
| 0070   | 2310-5151040 | PORTLAND CEMENT CONCRETE OVERLAY, FURNISH ONLY  | CY   | 12,491.000 | 0.000  | 12,491.000 |
|  | 2310-        | PORTLAND CEMENT CONCRETE OVERLAY  |      |            |        |            |

0 Item(s) Add Items Cancel

To select a particular item, simply click on the line containing the item's information. Once selected, a green circle with a check mark will appear on the right end of the line. Select all desired items. If an item is selected by mistake, simply click the line containing the item's information again, and the green circle will disappear. When all desired items have been selected, click the blue "Add Items" button in the bottom, right corner of the window.

### Change Project Items

Search

| Line Number  | Item ID      | Description   | Unit | Authorized | Placed | Remaining  |   |
|--|--------------|---|------|------------|--------|------------|---|
| <b>Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS</b> |              |   |      |            |        |            |   |
| 0010   | 2110-3825010 | GRANULAR MATERIAL   | TON  | 760.000    | 0.000  | 760.000    |   |
| 0020   | 2121-7425020 | GRANULAR SHOULDERS, TYPE B  | TON  | 9,550.000  | 0.000  | 9,550.000  |   |
| 0030   | 2214-5145150 | PAVEMENT SCARIFICATION  | SY   | 74,947.000 | 0.000  | 74,947.000 | ✔ |
| 0040   | 2301-0690220 | BRIDGE APPROACH, SECONDARY ROADS  | SY   | 97.800     | 0.000  | 97.800     |   |
| 0050   | 2301-1032090 | STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, CLASS C, CLASS 2 DURABILITY, 9 IN. | SY   | 2,813.000  | 0.000  | 2,813.000  |   |
| 0060   | 2301-9091000 | RUMBLE STRIP PANEL (PCC SURFACE)  | EACH | 6.000      | 0.000  | 6.000      | ✔ |
| 0070   | 2310-5151040 | PORTLAND CEMENT CONCRETE OVERLAY, FURNISH ONLY  | CY   | 12,491.000 | 0.000  | 12,491.000 |   |
|  | 2310-        | PORTLAND CEMENT CONCRETE OVERLAY  |      |            |        |            |   |

2 Item(s)

Add Items
Cancel

Add items to any/all sections desired. You may add items to multiple sections within the same change order if needed only if the sections are divisions under one project number (accounting ID). Do NOT add items to multiple sections in one change order if the sections represent separate projects tied together in one contract.

When the “Add Items” button is clicked, you will be brought back to the Quantity Changes section. Lines will display containing information for any of the items selected in the window above. Ensure the items were added to the correct section. The fields for “Proposed Change”, “Proposed Quantity”, “Fund Package” (if there are multiple fund packages on the contract), and “Reason” will be editable. You may leave the “Reason” field blank. All reasons and descriptions were added on the previous screen.

The screenshot displays the 'Quantity Changes' section of a software application. The main area contains a table with the following columns: Line Number, Item ID, Quantity, Unit, Unit Price, Proposed Change, Proposed Quantity, Proposed Extension Change, and Fund Package. Two items are listed:

| Line Number | Item ID      | Quantity   | Unit | Unit Price | Proposed Change | Proposed Quantity | Proposed Extension Change | Fund Package                                    |
|-------------|--------------|------------|------|------------|-----------------|-------------------|---------------------------|---|
| 0030        | 2214-5145150 | 74,947.000 | SY   | \$1.350    | 0.000           | 74,947.000        | \$0.00                    | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 |
| 0060        | 2301-9091000 | 6.000      | EACH | \$25.000   | 0.000           | 6.000             | \$0.00                    | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 |

Below each item, there is a 'Reason' field with a red 'X' icon, indicating it is required but empty. The interface includes a sidebar with navigation options like 'ALL REPORTS', 'DAILY ACTIVITIES', 'ITEMS', 'MATERIALS', 'STOCKPILES', 'TIME LIMITS', 'CHANGE ORDERS', and 'PUNCH LIST'. At the bottom, there are 'Save' and 'Cancel' buttons and a 'Total Proposed Amount: \$0.00' display.



Enter a value in either the “Proposed Change” or “Proposed Quantity” field, not both. Entering data in one of these fields will automatically cause the other field to update accordingly. Entries in the “Proposed Change” field should reflect the increase or decrease (positive or negative) in quantity to the existing item. Entries in the “Proposed Quantity” field should reflect the final total for the item after increases or decreases have been made.

| Line Number   | Item ID      | Quantity   | Unit | Unit Price | Proposed Change | Proposed Quantity | Proposed Extension Change | Fund Package                                    |
|---|--------------|------------|------|------------|-----------------|-------------------|---------------------------|---|
| Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS |              |            |      |            |                 |                   |                           |   |
| 0030  | 2214-5145150 | 74,947.000 | SY   | \$1.350    | -120.000        | 74,827.000        | -\$162.00                 | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 |
| PAVEMENT SCARIFICATION  |              |            |      |            |                 | Reason<br>Reason  |                           |   |
| 0060  | 2301-9091000 | 6.000      | EACH | \$25.000   | 3.000           | 9.000             | \$75.00                   | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 |
| RUMBLE STRIP PANEL (PCC SURFACE)                                      |              |            |      |            |                 | Reason<br>Reason  |                           |   |
| Displaying all 2 change order quantities                              |              |            |      |            |                 |                   |                           |   |
| Section: 0002 - FM-C021(154)--55-21, Acct ID- 38935, ROADWAY ITEMS    |              |            |      |            |                 |                   |                           |   |
| No change order quantities found                                      |              |            |      |            |                 |                   |                           |   |
|   |              |            |      |            |                 |                   |                           | Total Proposed Amount: -\$87.00                 |

Choose the “Fund Package” in the drop-down that corresponds to the contract section that you are modifying with that line-item entry. If there is only one fund package for the contract, you will not see this option. If your quantity change is non-participating, ensure you select a non-participating funding package. Refer to Section 4 of the [Appia Project Creation & Account Management Instructions](#) for guidance on creating funding packages.

| Line Number   | Item ID      | Quantity   | Unit | Unit Price | Proposed Change | Proposed Quantity | Proposed Extension Change | Fund Package                                    |
|---|--------------|------------|------|------------|-----------------|-------------------|---------------------------|---|
| Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS |              |            |      |            |                 |                   |                           |   |
| 0030  | 2214-5145150 | 74,947.000 | SY   | \$1.350    | -120.000        | 74,827.000        | -\$162.000                | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 |
| PAVEMENT SCARIFICATION  |              |            |      |            |                 |                   |                           |   |
| Reason  |              |            |      |            |                 |                   |                           |   |
| Reason  |              |            |      |            |                 |                   |                           |   |
| 0060  | 2301-9091000 | 6.000      | EACH | \$25.000   | 3.000           | 9.000             | \$75.000                  | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 |
| RUMBLE STRIP PANEL (PCC SURFACE)                                      |              |            |      |            |                 |                   |                           |   |
| Reason  |              |            |      |            |                 |                   |                           |   |
| Reason  |              |            |      |            |                 |                   |                           |   |
| Displaying all 2 change order quantities                              |              |            |      |            |                 |                   |                           |   |
| Section: 0002 - FM-C021(154)--55-21, Acct ID- 38935, ROADWAY ITEMS    |              |            |      |            |                 |                   |                           |   |
| No change order quantities found                                      |              |            |      |            |                 |                   |                           |   |
|   |              |            |      |            |                 |                   |                           | Total Proposed Amount: -\$87.00                 |

If the quantity change for any given item needs to be split amongst multiple funding packages, click the blue “Split” button on the right end of the line containing the item’s information. The “split” option will only shown if there are two or more fund packages available to choose from.

0060 2301-9091000 6.000 EACH \$25.000 3.000 9.000 \$75.00 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153

RUMBLE STRIP PANEL (PCC SURFACE)

Reason

Reason

STOCKPILES

TIME LIMITS

Split

Once the “Split” button is clicked, boxes will appear under the item for each existing fund package. Enter the quantity corresponding to each of the funding packages in the associated box. The total “Proposed Change” will update automatically.

0060 2301-9091000 6.000 EACH \$25.000 3.000 9.000 \$75.00 Split by 3 packages Reset

RUMBLE STRIP PANEL (PCC SURFACE)

Reason

Reason

21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 2.000

001 CLAY CO LOCAL 21-C021-153 1.000

001 CLAY CO FM 21-C021-154 0.000

If you pushed, “Split” by mistake or no longer wish to split the change in quantity amongst multiple fund packages, simply click the red “Reset” button in the upper, right corner of the item’s line.

0060 2301-9091000 6.000 EACH \$25.000 3.000 9.000 \$75.00 Split by 3 packages Reset

RUMBLE STRIP PANEL (PCC SURFACE)

Reason

Reason

21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 2.000

001 CLAY CO LOCAL 21-C021-153 1.000

001 CLAY CO FM 21-C021-154 0.000

To delete an item that was added by mistake, click on the red circle with the “x” at the right end of the line containing the item’s information.

Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS Select Items

| Line Number | Item ID      | Quantity | Unit | Unit Price | Proposed Change | Proposed Quantity | Proposed Extension Change | Fund Package                                    | Buttons    |
|-------------|--------------|----------|------|------------|-----------------|-------------------|---------------------------|---|------------|
| 0010        | 2110-3825010 | 760.000  | TON  | \$7.900    | 20.000          | 780.000           | \$158.00                  | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 | Save Split |

GRANULAR MATERIAL

Reason  
Reason

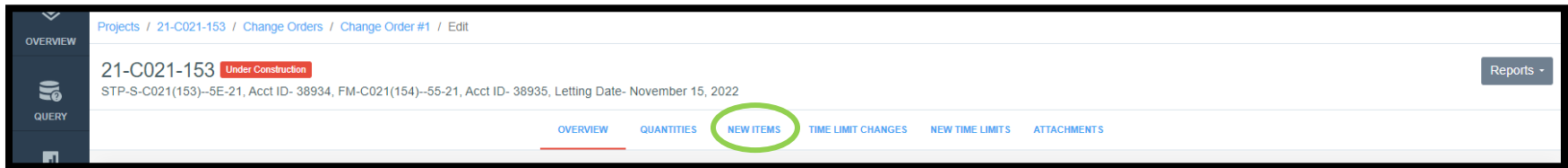
Once all Quantity Changes entries are complete, click the blue "Save" button in the upper, right corner or in the bottom, center of the screen.

Quantity Changes Save Cancel

| Line Number   | Item ID      | Quantity   | Unit | Unit Price | Proposed Change | Proposed Quantity             | Proposed Extension Change | Fund Package                                    | Buttons    |       |
|---|--------------|------------|------|------------|-----------------|-------------------------------|---------------------------|---|------------|-------|
| Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS <span>Select Items</span> |              |            |      |            |                 |                               |                           |   |            |       |
| 0030  | 2214-5145150 | 74,947.000 | SY   | \$1.350    | -120.000        | 74,827.000                    | -\$162.00                 | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 | Save Split |       |
| PAVEMENT SCARIFICATION  |              |            |      |            |                 |                               |                           |   |            |       |
| Reason<br>Reason  |              |            |      |            |                 |                               |                           |   |            |       |
| 0060  | 2301-9091000 | 6.000      | EACH | \$25.000   | 3.000           | 9.000                         | \$75.00                   | Split by 3 packages                             | Reset      |       |
| RUMBLE STRIP PANEL (PCC SURFACE)  |              |            |      |            |                 |                               |                           |   |            |       |
| Reason<br>Reason  |              |            |      |            |                 |                               |                           |   |            |       |
| 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153   |              |            |      |            | 2.000           | 001 CLAY CO LOCAL 21-C021-153 |                           |   |            | 1.000 |
| 001 CLAY CO FM 21-C021-154  |              |            |      |            | 0.000           |                               |                           |   |            |       |
| Displaying all 2 change order quantities  |              |            |      |            |                 |                               |                           |   |            |       |
| Section: 0002 - FM-C021(154)--55-21, Acct ID- 38935, ROADWAY ITEMS <span>Select Items</span>    |              |            |      |            |                 |                               |                           |   |            |       |
| No change order quantities found  |              |            |      |            |                 |                               |                           |   |            |       |
|   |              |            |      |            |                 |                               |                           | Total Proposed Amount: -\$87.00                 |            |       |
| <span>Save Cancel</span>  |              |            |      |            |                 |                               |                           |   |            |       |

## 2) New Items / New Items (Edit Mode)

Use New Items when adding an item that does not yet exist in the chosen section of the contract. To enter a new item, click the gray “Edit” button on the right end of the New Items line. (If in edit mode, click on the “New Items” tab near the top, center of the screen.)



This will bring you to the New Items data entry screen. If there are multiple sections in your Appia project (different tied projects in the contract or different divisions within a contract), you will see lines for each independent section as shown below. If only one section is present on the contract, only one section will be displayed.



To select the item(s) that is being added by the change order, click the gray “Add Items” button on the right end of the line. For Appia projects with multiple sections, be sure to click the “Add Items” button on the line that corresponds with the section the item is to be added to. You may add items to multiple sections within the same change order if needed only if the sections are divisions under one project number (accounting ID). Do NOT add items to multiple sections in one change order if the sections represent separate projects tied together in one contract (separate accounting IDs).

The screenshot shows a web interface titled "New Items". At the top right, there is a toggle for "In dollars?" set to "NO", and "Save" and "Cancel" buttons. Below this is a table with columns: "Line Number", "Item ID", "Quantity", "Unit", "Unit Price", "Extension", and "Fund Package".

| Line Number   | Item ID | Quantity | Unit | Unit Price | Extension | Fund Package |
|---|---------|----------|------|------------|-----------|--------------|
| Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS |         |          |      |            |           |              |
| No Items found  |         |          |      |            |           |              |
| Section: 0002 - FM-C021(154)--55-21, Acct ID- 38935, ROADWAY ITEMS    |         |          |      |            |           |              |
| No Items found  |         |          |      |            |           |              |

At the bottom right of the table area, it says "Total Proposed Amount: \$0.00". At the bottom center, there are "Save" and "Cancel" buttons. Two "Add Items" buttons are circled in green, one for each section.

When “Add Items” is chosen, the window shown below will pop up. It contains a list of the items available in your Reference Data. (Refer to Section 17 of the [Appia Project Creation & Account Management Instructions](#) for guidance on adding items to Reference Data if your item is not available.) You can search for a particular item in the search bar, or you can use the scroll bar on the right side (or scroll with your mouse) to scroll through the items. An option to navigate to another page can be found by scrolling to the very bottom of the list.

Add Item(s) to Section

Search for Item ID, Description and Unit Search

| Item ID     | Description   | Unit       |
|-------------|---|------------|
| 0 201-01    | CLEARING AND GRUBBING                               | \$1,500.00 |
| 0 201-05.31 | VEGETATION REMOVAL                                  | \$2,000.00 |
| 0 201-07.01 | REMOVAL AND DISPOSAL OF BRUSH & TREES               | \$2,500.00 |
| 0 202-03    | REMOVAL OF RIDGID PAVEMENT, SIDEWALKS, ECT.         | \$10.00    |
| 0 202-03.01 | REMOVAL OF ASPHALT PAVEMENT                         | \$10.60    |
| 0 202-03.02 | REMOVAL OF RIGID PAVEMENT                           | \$25.00    |
| 0 202-08.15 | REMOVAL OF CURB AND GUTTER (6-30)                   | \$4.20     |
| 0 208-01.09 | Construction Layout and Topographic As-Built Survey | \$1,000.00 |
| 0 209-01.31 | TEMPORARY MULCH FILTER BERM                         | \$250.00   |
| 0 209-01.31 | TEMPORARY MULCH FILTER BERM                         | \$75.00    |

0 Item(s) Add Items Cancel

1 2 3 4 5 ... Next > Last >

Displaying items 1 - 30 of 4712 in total

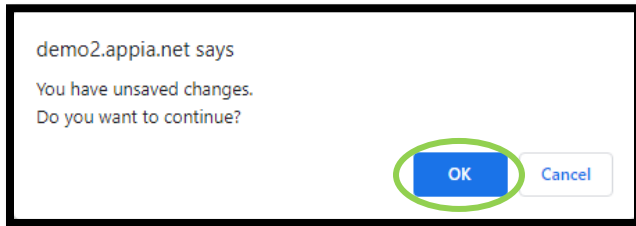
To select an item, simply click on the line containing the item's information. A number "1" will appear in the green rectangle on the left side of the line containing the item's information. Select items as many times as needed. If an item is selected more than once, a number corresponding to the number of selections will appear in the green rectangle (i.e., a "2" for two entries, a "3" for three entries, etc.). Multiple items may be selected. Select all desired items. If an item is selected by mistake, simply click on the red circle with the "x" on the right end of the line containing the item's information, and the number in the green rectangle will be reduced. When all desired items have been selected, click the blue "Add Items" button in the bottom, right corner of the window.

| Item ID      | Description                           | Unit |
|--------------|---------------------------------------|------|
| 2214-5145160 | PAV'T, SCARIFICATION                  | TON  |
| 2214-7450050 | BLADING+SHAPING SHLD MAT'L            | STA  |
| 2216-0994000 | CRACK+SEAT OF PCC PAV'T               | SY   |
| 2217-1000000 | RUBBLIZED PAV'T                       | SY   |
| 2301-0685550 | BRIDGE APPROACH PAVEMENT, AS PER PLAN | SY   |
| 2301-0690180 | BRIDGE APPROACH, RK-18                | SY   |
| 2301-0690190 | BRIDGE APPROACH, RK-19                | SY   |
| 2301-0690200 | BRIDGE APPROACH, RK-20                | SY   |
| 2301-0690201 | BRIDGE APPROACH, BR-201               | SY   |
| 2301-0690202 | BRIDGE APPROACH, BR-202               | SY   |
| 2301-0690203 | BRIDGE APPROACH, BR-203               | SY   |

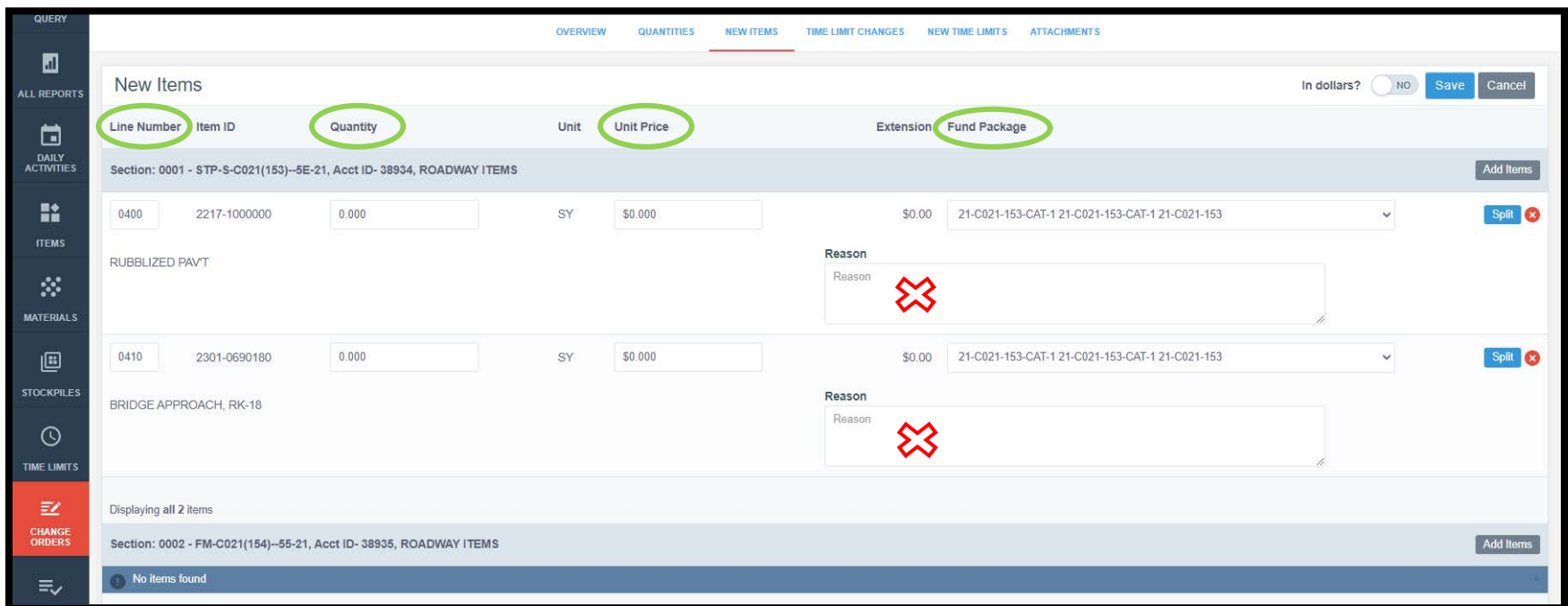
Add items to any/all sections desired.



When navigating between pages of items, a pop-up window may appear saying you have unsaved changes and asking if you want to continue. Click the blue “OK” button.



When the “Add Items” button is clicked, you will be brought back to the New Items section. Lines will display containing information for any of the items selected in the window above. Check to make sure the items were added to the correct section. The fields for “Line Number”, “Quantity”, “Unit Price”, “Fund Package”, and “Reason” will be editable. The Fund Package option will only be shown if there are multiple fund packages available for the project. You may leave the “Reason” field blank. All reasons and descriptions were added on the previous screen.



**Override the auto-populated Line Number by entering the appropriate 8000 number.**

Look at any previous change orders to check 8000 line numbers for any previously added new items. Continue numbering sequentially, starting at 8001. If there are multiple projects included in the contract, each project should add new items starting at 8001 but should include an alphabetical supplement to the number (example: Project 1 - 8001a, 8002a, 8003a, etc. and Project 2 - 8001b, 8002b, 8003b, etc.)

Refer to [I.M. 6.000, Attachment D](#), section 2.36. See Section A of the “Preparation of Change Order (Form 831240 or Appia Change Order)” subsection for guidance on numbering.

Also, enter a value in each the “Quantity” and “Unit Price” fields.

The screenshot shows a software interface for adding new items to a change order. The interface includes a sidebar with navigation options like 'ALL REPORTS', 'DAILY ACTIVITIES', 'ITEMS', 'MATERIALS', 'STOCKPILES', 'TIME LIMITS', 'CHANGE ORDERS', and 'PUNCH LIST'. The main area is titled 'New Items' and has tabs for 'OVERVIEW', 'QUANTITIES', 'NEW ITEMS', 'TIME LIMIT CHANGES', 'NEW TIME LIMITS', and 'ATTACHMENTS'. The 'NEW ITEMS' tab is active. At the top right, there are buttons for 'Save' and 'Cancel', and a toggle for 'In dollars?' set to 'NO'. The table below has columns for 'Line Number', 'Item ID', 'Quantity', 'Unit', 'Unit Price', 'Extension', and 'Fund Package'. Two items are listed, each with a green circle around its line number, quantity, and unit price. The first item has line number 8001, item ID 2217-1000000, quantity 160.000, and unit price \$30.000. The second item has line number 8002, item ID 2301-0690180, quantity 100.000, and unit price \$220.000. Each item has a 'Reason' field and a 'Split' button. The interface also shows sections for 'Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS' and 'Section: 0002 - FM-C021(154)--5E-21, Acct ID- 38935, ROADWAY ITEMS'. A 'Total Proposed' field is visible at the bottom right.

| Line Number | Item ID      | Quantity | Unit | Unit Price | Extension   | Fund Package                                    |
|-------------|--------------|----------|------|------------|-------------|---|
| 8001        | 2217-1000000 | 160.000  | SY   | \$30.000   | \$4,800.00  | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 |
| 8002        | 2301-0690180 | 100.000  | SY   | \$220.000  | \$22,000.00 | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 |

Choose the “Fund Package” in the drop-down that corresponds to the contract section that you are modifying with the line-item entry. If your new item is non-participating, ensure you select a non-participating funding package. Refer to [Section 4 of the Appia Project Creation & Account Management Instructions](#) for guidance on creating funding packages.

The screenshot shows the 'New Items' interface with two line items. The first item (Line Number 8001, Item ID 2217-1000000) has a quantity of 160.000, unit SY, and unit price of \$30.000. Its extension is \$4,800.00 and the fund package is '21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153'. The second item (Line Number 8002, Item ID 2301-0690180) has a quantity of 100.000, unit SY, and unit price of \$220.000. Its extension is \$22,000.00 and the fund package is '21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153'. Both fund package dropdowns and the blue 'Split' buttons are circled in green. The interface includes a sidebar with navigation options like 'ALL REPORTS', 'DAILY ACTIVITIES', 'ITEMS', 'MATERIALS', 'STOCKPILES', 'TIME LIMITS', 'CHANGE ORDERS', and 'PUNCH LIST'. At the top, there are tabs for 'OVERVIEW', 'QUANTITIES', 'NEW ITEMS', 'TIME LIMIT CHANGES', 'NEW TIME LIMITS', and 'ATTACHMENTS'. A 'Reason' text area is visible for each item.

If the quantity for any given item needs to be split amongst multiple funding packages, click the blue “Split” button on the right end of the line containing the item’s information.

This close-up screenshot focuses on the second line item (Line Number 8002, Item ID 2301-0690180). It shows the quantity of 100.000, unit SY, unit price of \$220.000, and extension of \$22,000.00. The fund package dropdown is set to '21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153'. The blue 'Split' button is circled in green. The 'Reason' text area is also visible.

Once the “Split” button is clicked, boxes will appear under the item for each existing fund package. Enter the quantity corresponding to each of the funding packages in the associated box. Once you enter a quantity in one of the fund packages, Appia will automatically assign the balance to another funding package using the total quantity assigned on the main item entry line. (In the screenshot shown below, total quantity of 100.000 was entered on the main item entry line. When a quantity of 80.000 was entered in the first funding package line, it automatically assigned a quantity of 20.000 to the second fund package line.) For splits between more than two fund packages, you may need to keep adjusting the numbers in the individual fund packages until you achieve the correct split.

The screenshot displays a software interface for entering a split entry. At the top, there are several input fields: '8002', '2301-0690180', '100.000' (circled in green), 'SY', '\$220.000', '\$22,000.00', and 'Split by 3 packages'. A 'Reset' button with a close icon is in the top right. Below these fields is the text 'BRIDGE APPROACH, RK-18'. To the right, there is a 'Reason' label and an empty text box. Underneath, three funding package lines are visible, each with a quantity input field circled in green: '21-0001-153-CAT-1 21-C021-153-CAT-1 21-C021-153' with '80.000', '001 CLAY CO LOCAL 21-C021-153' with '20.000', and '001 CLAY CO FM 21-C021-154' with '0.000'.



If you pushed “Split” by mistake or no longer wish to split the change in quantity amongst multiple fund packages, simply click the red “Reset” button in the upper, right corner of the item’s line.

The screenshot shows a software interface for an item line. At the top, there are input fields for '8002', '2301-0690180', '100.000', 'SY', and '\$220.000'. To the right, it says '\$22,000.00' and 'Split by 3 packages'. A red 'Reset' button is circled in green in the upper right corner. Below this, the text 'BRIDGE APPROACH, RK-18' is visible. There are two 'Reason' text boxes. Below the first, there are three categories: '21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153' with a value of '80.000', '001 CLAY CO LOCAL 21-C021-153' with a value of '20.000', and '001 CLAY CO FM 21-C021-154' with a value of '0.000'.

To delete an item that was added by mistake, click on the red circle with the “x” at the right end of the line containing the item’s information.

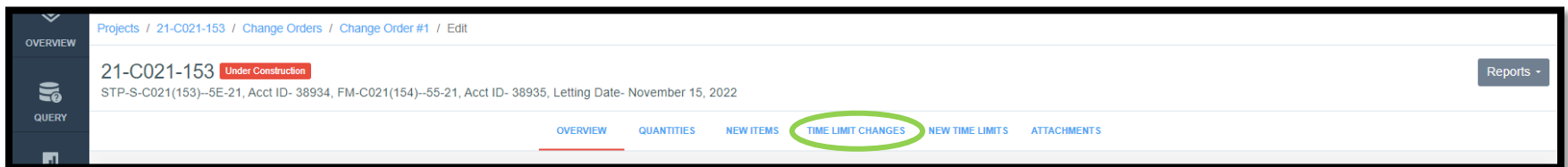
The screenshot shows a software interface for an item line. At the top, it says 'Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS' and 'Select Items'. Below this, there are input fields for '0010', '2110-3825010', '760.000 TON', '\$7.900', '20.000', '760.000', '\$158.00', and a dropdown menu with '21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153'. A blue 'Sp' button with a red 'x' is circled in green. Below this, the text 'GRANULAR MATERIAL' is visible. There are two 'Reason' text boxes.

Once all New Item entries are complete, click the blue “Save” button in the upper, right corner or in the bottom, center of the screen.

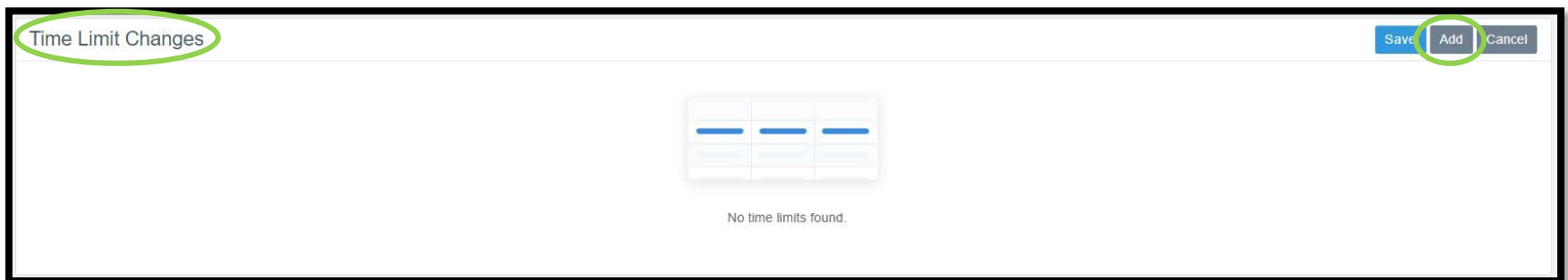
The screenshot displays the 'New Items' interface. On the left is a vertical navigation menu with icons for ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS (highlighted in red), PUNCH LIST, PAYMENTS, and CONTRACTORS. The main area is titled 'New Items' and includes a header with 'In dollars?' (radio buttons for YES/NO), a circled blue 'Save' button, and a 'Cancel' button. Below the header is a table with columns: Line Number, Item ID, Quantity, Unit, Unit Price, Extension, and Fund Package. The table is divided into two sections. Section 0001 (STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS) contains two items: Line 8001 (Quantity: 160.000, Unit Price: \$30.000, Extension: \$4,800.00) and Line 8002 (Quantity: 100.000, Unit Price: \$220.000, Extension: \$22,000.00). Each item has a 'Reason' text area and a 'Split' or 'Reset' button. Section 0002 (FM-C021(154)--55-21, Acct ID- 38935, ROADWAY ITEMS) shows 'No items found'. At the bottom right, the 'Total Proposed Amount: \$26,800.00' is displayed. A circled blue 'Save' button and a 'Cancel' button are located at the bottom center of the screen.

### 3) [Time Limit Changes](#) / [Time Limit Changes \(Edit Mode\)](#)

Use Time Limit Changes when making a change to an existing contract time limit (i.e., extending the number of working days on a contract). To enter a time limit change, click the gray “Edit” button on the right end of the Time Limit Changes line. (If in edit mode, click on the “Time Limit Changes” tab near the top, center of the screen.)



This will bring you to the Time Limit Changes data entry screen. To modify an existing time limit, click on the blue “Add” button in the upper, right corner.





An “Add Time Limit(s)” window will pop up. If multiple time limits are present on the contract, there will be multiple lines displaying, one for each distinct time limit. As shown in the screenshot below, the “Add Time Limits” button in the lower, right corner is initially grayed out.

The screenshot shows a window titled "Add Time Limit(s)" with a search bar at the top. Below the search bar is a table with columns "Description", "Deadline", and "Days Charged". One row is visible with the description "Working Days, Late Start Date - 05/22/2023, Liquidated Damage Rate - 1,600", a deadline of "80.0 Working Days", and "0" days charged. Below the table, it says "Displaying 1 time limits". At the bottom left, it says "0 Time Limits(s)". At the bottom right, there are two buttons: "Add Time Limits" (which is grayed out) and "Cancel".

| Description  | Deadline          | Days Charged |
|--|-------------------|--------------|
| Working Days, Late Start Date - 05/22/2023, Liquidated Damage Rate - 1,600 | 80.0 Working Days | 0            |

View with multiple time limits

The screenshot shows a window titled "Add Time Limit(s)" with a search bar at the top. Below the search bar is a table with columns "Description", "Deadline", and "Days Charged". Two rows are visible. The first row has the description "Road closure of Melrose Avenue/IWV Road. See details below., Liquidated Damages- 2,000.00", a deadline of "20.0 Calendar Days", and "0" days charged. The second row has the description "Working Days, Late Start Date- 12 July 2021, Liquidated Damages- 2,000.00", a deadline of "150.0 Working Days", and "0" days charged. Below the table, it says "Displaying all 2 time limits". At the bottom left, it says "0 Time Limits(s)". At the bottom right, there are two buttons: "Add Time Limits" (which is grayed out) and "Cancel".

| Description   | Deadline           | Days Charged |
|---|--------------------|--------------|
| Road closure of Melrose Avenue/IWV Road. See details below., Liquidated Damages- 2,000.00 | 20.0 Calendar Days | 0            |
| Working Days, Late Start Date- 12 July 2021, Liquidated Damages- 2,000.00                 | 150.0 Working Days | 0            |

To move forward with the modification, click on the line containing the time limit to you want to change. A green circle with a check mark will appear on the right end of the line containing the time limit information, and the “Add Time Limits” button in the lower, right corner will turn blue. Click on the “Add Time Limits” button.

| Description  | Deadline          | Days Charged |
|--|-------------------|--------------|
| Working Days, Late Start Date - 05/22/2023, Liquidated Damage Rate - 1,600 | 80.0 Working Days | 0            |

1 Time Limits(s)

Add Time Limits Cancel

When the “Add Time Limits” button is clicked, you will be brought to the Time Limit Changes screen. Lines will display containing information for the time limits that you selected in the previous window. The fields for “Deadline Extension” and “Reason” fields will be editable. You may leave the “Reason” field blank. All reasons and descriptions were added on a previous screen.

| Type         | Authorized Deadline | Days Charged | Deadline Extension | New Deadline | Reason |
|--------------|---------------------|--------------|--------------------|--------------|--------|
| Working Days | 80.0 Days           | 0.0 Days     |                    | 80.0 Days    |        |

Save Add Cancel

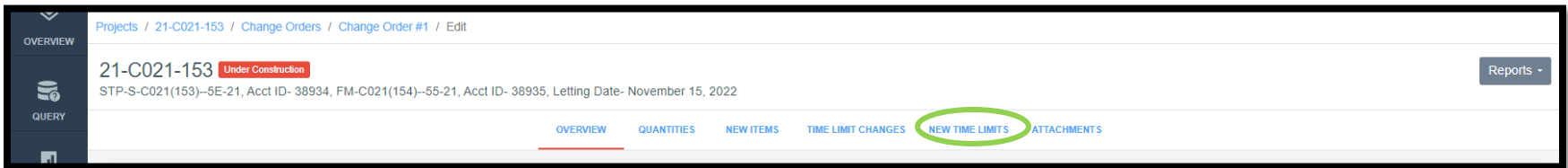
In the “Deadline Extension” field, enter a value reflecting the amount the existing time limit is to be changed. For example, if three working days are being added, enter “3.0”. The value entered may be either positive or negative (an increase or a reduction in days). The “New Deadline” field will automatically update to add in/subtract the value entered in the “Deadline Extension” field. If you missed adding a time limit and want to add it now, click on the gray “Add” button in the upper, right corner or bottom, center of the page. If all time limit modifications have been entered, click on the blue “Save” button in either the upper, right corner or the bottom, center of the page.

The screenshot displays the 'Time Limit Changes' interface. At the top, there are navigation tabs: OVERVIEW, QUANTITIES, NEW ITEMS, TIME LIMIT CHANGES (selected), NEW TIME LIMITS, and ATTACHMENTS. The main content area is titled 'Time Limit Changes' and contains a table with the following columns: Type, Authorized Deadline, Days Charged, Deadline Extension, New Deadline, and Reason. The table has one row with the following data: Type: Working Days, Authorized Deadline: 80.0 Days, Days Charged: 0.0 Days, Deadline Extension: 2.0, New Deadline: 82.0 Days, Reason: (empty). Below the table, it says 'Displaying 1 time limit'. In the top right corner, there are buttons for 'Save', 'Add', and 'Cancel'. In the bottom center, there are buttons for 'Save' and 'Add'. The 'Deadline Extension' field and the '2.0' value are circled in green. The 'Save' and 'Add' buttons in the top right and bottom center are also circled in green.

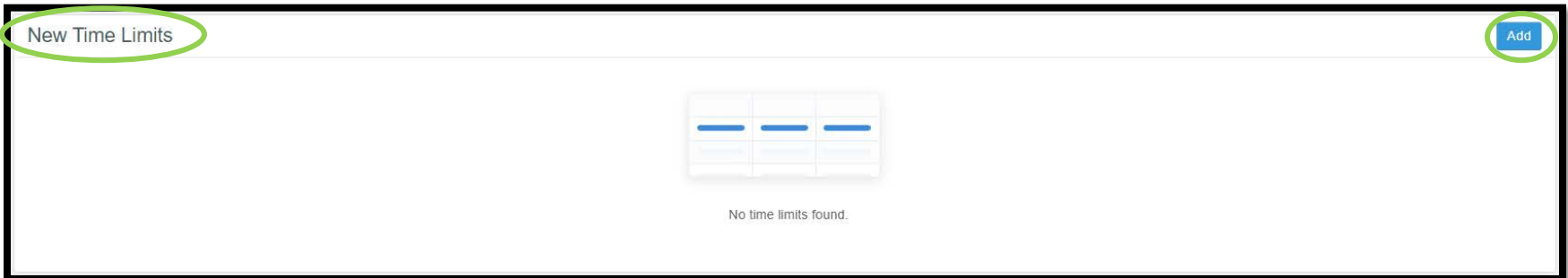
| Type         | Authorized Deadline | Days Charged | Deadline Extension | New Deadline | Reason |
|--------------|---------------------|--------------|--------------------|--------------|--------|
| Working Days | 80.0 Days           | 0.0 Days     | 2.0                | 82.0 Days    |        |

#### 4) [New Time Limits / New Time Limits \(Edit Mode\)](#)

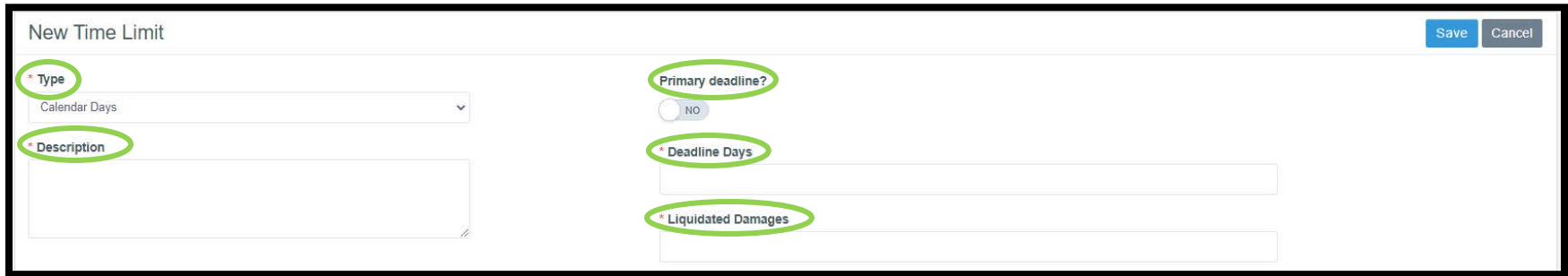
Use New Time Limits only when adding a completely new time constraint to the contract, such as a new site time. Do not use this option if you are simply adding/subtracting days from an existing time limit. To enter a new time limit, click the gray “Edit” button on the right end of the New Time Limits line. (If in edit mode, click on the “New Time Limits” tab near the top, center of the screen.)



This will bring you to the New Time Limits screen. To add a new time limit, click on the blue “Add” button in the upper, right corner.



Clicking the blue “Add” button will bring you to the New Time Limit data entry screen. The fields for “Type”, “Description”, “Deadline Days”, and “Liquidated Damages” will be editable. Additionally, there is a toggle for “Primary deadline?”.



The screenshot shows the 'New Time Limit' form with the following fields highlighted in green circles: 'Type' (a dropdown menu currently showing 'Calendar Days'), 'Description' (a text input field), 'Primary deadline?' (a toggle switch currently set to 'NO'), 'Deadline Days' (a text input field), and 'Liquidated Damages' (a text input field). The form also includes 'Save' and 'Cancel' buttons in the top right corner.

In the “Type” box, there is a pull-down menu with three choices: “Calendar Days”, “Completion Date”, and “Working Days”. Choose the appropriate option for your new time limit.



This close-up shows the 'Type' dropdown menu with three options: 'Calendar Days', 'Completion Date', and 'Working Days'. The 'Calendar Days' option is currently selected and highlighted in blue.

In the “Description Box”, enter the following pieces of text information separated by commas.

- The type of time limit (whichever of the three choices was chosen in the pull-down menu under “Type”).
- The time limit constraint
  - For calendar day limits, enter “Calendar Days – xx” with “x” being the number of days.
    - If the limit is associated with a specific site time rather than an overall contract limit, enter the description of the phase/site being addressed instead of “Calendar Days – xx”. For example, “Road closure of Melrose Avenue”.
  - For completion day limits, enter “Completion Date – mm/dd/yyyy”
  - For working day limits, enter “Late Start Date – mm/dd/yyyy”, or “Specified Start Date – mm/dd/yyyy”, or “Approximate Start Date – mm/dd/yyyy”
- The liquidated damages. Enter “Liquidated Damage Rate – x,xxx” with “x” being the \$ of damage per day.

In the “Deadline Days” or “Deadline Date” box, enter the number of days for the time limit, or, in the case of a completion date time limit, select the appropriate completion date from the calendar that will pop up when you click in the box.

In the “Liquidated Damages” box, **enter 0.00**. If a value is entered into this field, Appia will automatically deduct damages from the “bottom line” of a payment if the time limit is exceeded. This is not how Iowa DOT allows damages to be handled. Liquidated damages must be addressed by a separate change order specific to the number of days that incurred damages. Entering 0.00 in this field will result in a zero calculation if days are exceeded, so no damages will be taken from the “bottom line” of payments without a change order.

For the “Primary deadline?” toggle, toggle the switch to “Yes” (blue) if this site time is the time constraint for the overall contract. Leave the toggle switch at “No” (gray) if the time limit being created is a site time or is not the time constraint for the overall contract.

#### Calendar Day example – Overall contract limit

|  |  |
|--|--|
| <p>* Type<br/>Calendar Days</p>  | <p>Primary deadline?<br/><input checked="" type="checkbox"/> YES</p> |
| <p>* Description<br/>Calendar Days, Calendar Days - 90, Liquidated Damage Rate - 1,500</p> | <p>* Deadline Days<br/>90.0</p>                                      |
|  | <p>* Liquidated Damages<br/>\$0.00</p>                               |

#### Calendar Day example – Site time only

|  |  |
|--|--|
| <p>* Type<br/>Calendar Days</p>  | <p>Primary deadline?<br/><input type="checkbox"/> NO</p> |
| <p>* Description<br/>Calendar Days, Closure of intersection of Hwy 3 and 230th St., Liquidated Damage Rate - 1,500</p> | <p>* Deadline Days<br/>10.0</p>                          |
|  | <p>* Liquidated Damages<br/>\$0.00</p>                   |

### Completion Date example

|   |  |
|---|--|
| <b>* Type</b><br>Completion Date  | <b>Primary deadline?</b><br><input type="radio"/> NO |
| <b>* Description</b><br>Completion Date, Completion Date - 03/12/2024, Liquidated Damage Rate - 1,500 | <b>* Deadline Date</b><br>03/12/2024                 |
|   | <b>* Liquidated Damages</b><br>\$0.00                |

### Working Days example

|  |  |
|--|--|
| <b>* Type</b><br>Working Days  | <b>Primary deadline?</b><br><input checked="" type="radio"/> YES |
| <b>* Description</b><br>Working Days, Late Start Date - 03/12/2024, Liquidated Damage Rate - 1,500 | <b>* Deadline Days</b><br>40.0                                   |
|  | <b>* Liquidated Damages</b><br>\$0.00                            |

When all of the information has been entered in the fields, click the blue “Save” button in the upper, right corner.

|  |  |  |
|--|--|--|
| <b>New Time Limit</b>  |  | <input checked="" type="button" value="Save"/> <input type="button" value="Cancel"/> |
| <b>* Type</b><br>Working Days  | <b>Primary deadline?</b><br><input checked="" type="radio"/> YES |  |
| <b>* Description</b><br>Working Days, Late Start Date - 03/12/2024, Liquidated Damage Rate - 1,500 | <b>* Deadline Days</b><br>40.0                                   |  |
|  | <b>* Liquidated Damages</b><br>\$0.00                            |  |

When the “Save” button is clicked, you will be brought back to the New Time Limits screen. This screen will now include a line displaying the information for the new time limit you just created. If you wish to add another time limit, click the blue “Add” button in the upper, right corner. If you wish to edit the new time limit you just created, click on the blue circle with the pencil on the right end of the line containing the time limit information. If you wish to delete the new time limit you just entered, click on the red circle with the “x” on the right end of the line containing the time limit information. If everything is correct, and you don’t want to make any further changes to new time limits, simply click on one of the other tabs along the top of the change order window.

21-C021-153 Under Construction  
STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

OVERVIEW QUANTITIES NEW ITEMS TIME LIMIT CHANGES **NEW TIME LIMITS** ATTACHMENTS

### New Time Limits

Add

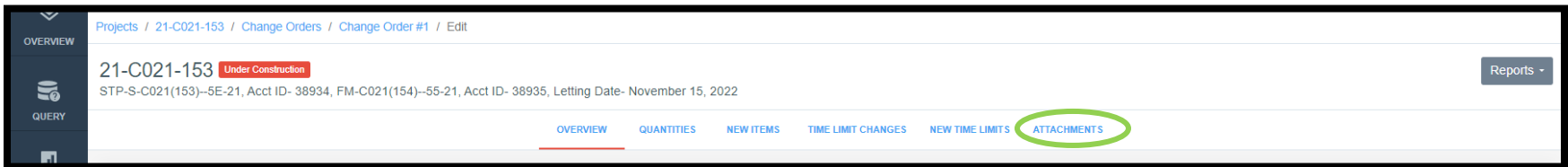
| Description  | Liquidated Damages per Day | Deadline          |
|--|----------------------------|-------------------|
| Working Days, Late Start Date - 03/12/2024, Liquidated Damage Rate - 1,500 | \$0.00                     | 40.0 Working Days |

Displaying 1 time limits

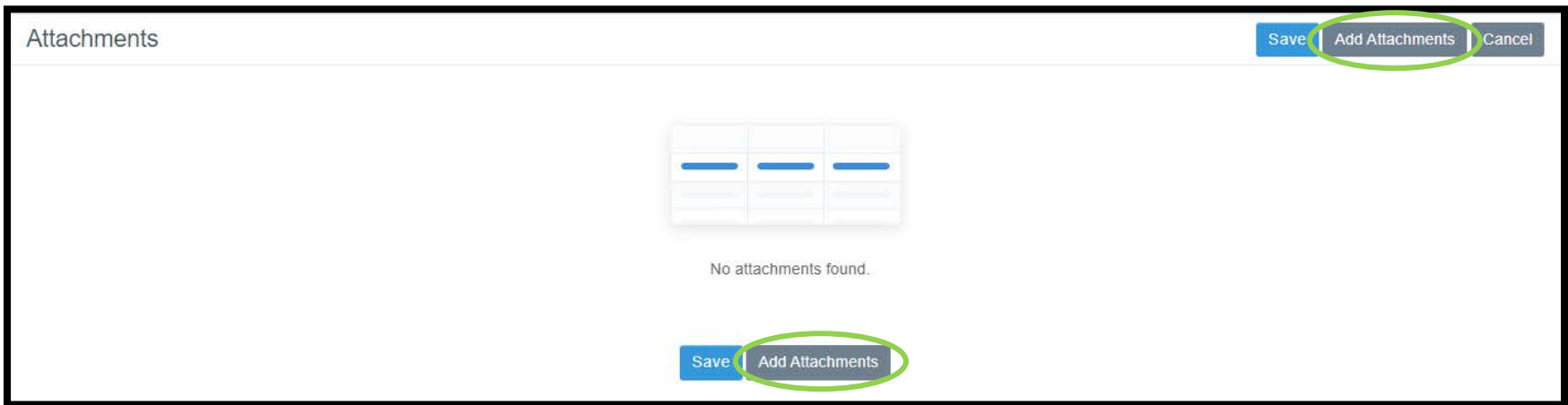


5) Attachments / Attachments (Edit Mode)

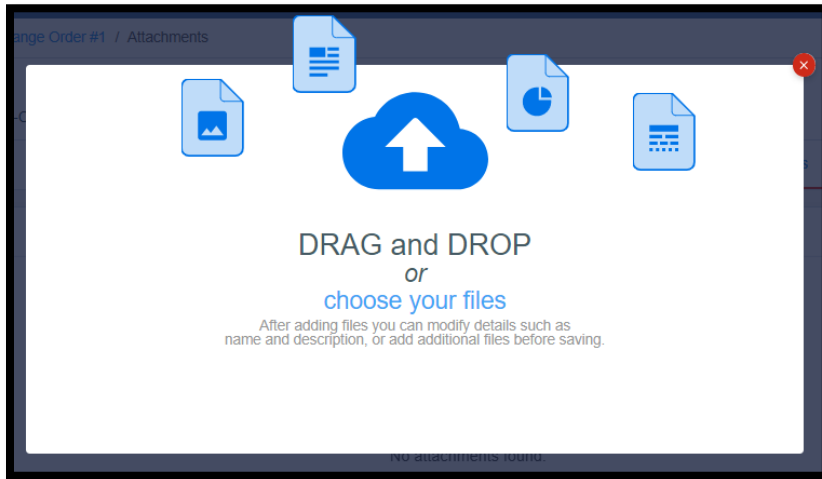
Attachments may be added to a change order. They can be downloaded for viewing. The printed change order report will show that files were attached to the change order, but the attachments themselves will not print/display in the change order report. To add an attachment to a change order, click the gray “Edit” button on the right end of the Attachments line. (If in edit mode, click on the “Attachments” tab near the top, center of the screen.)



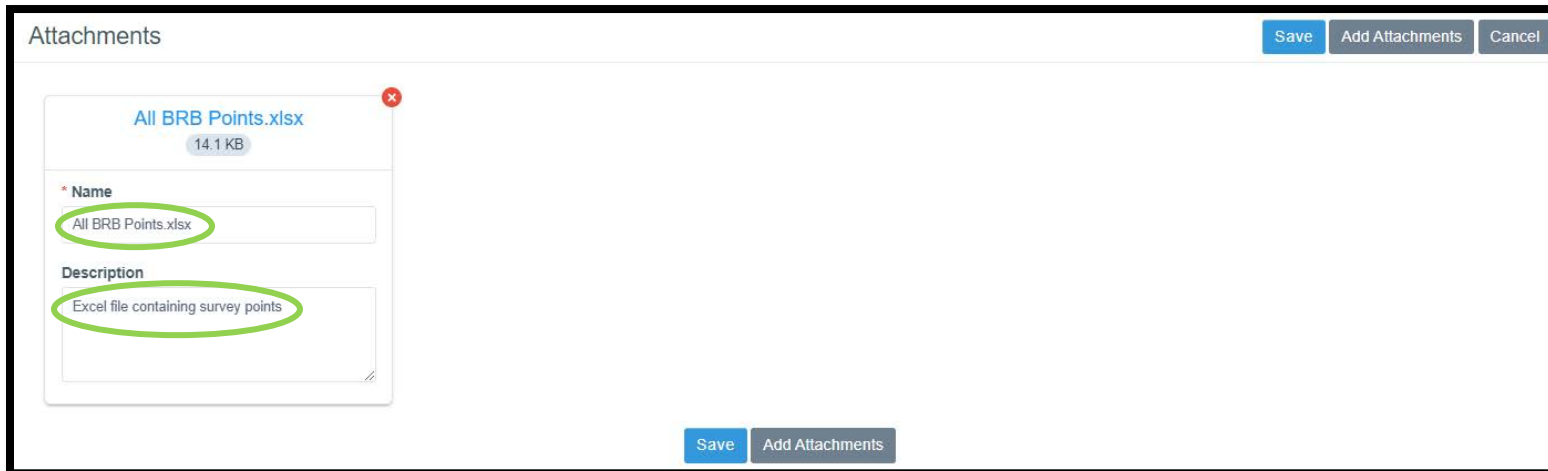
This will bring up the Attachments screen. Click on the gray “Add Attachments” button in either the top, right corner or bottom, center of the screen.



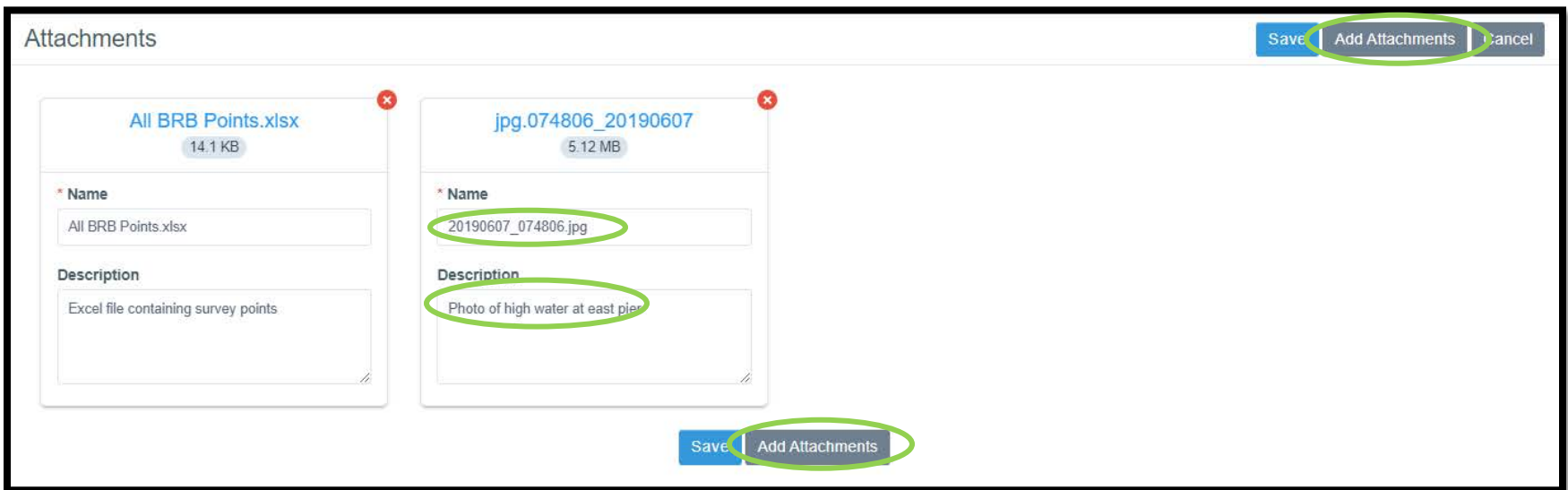
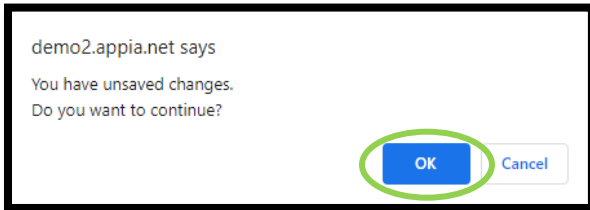
An upload window will pop up with a message saying, “DRAG and DROP or choose your files”. Either drag the desired file from an open windows explorer file to this box or click on “choose your files” to navigate to the desired file. Any file type/size is acceptable.



Once a file is added, the pop-up window will disappear, and the Attachments screen will come back. Now, it will show a file. Rename the file in the “Name” field and add a description of the file in the “Description” box.



If you want to add another attachment, click the gray “Add Attachments” button in either the top, right corner or bottom, center of the screen. A message may pop up saying you have unsaved changes and asking if you want to continue. Click the blue “OK” button. Your previously uploaded file will not be removed. The pop-up window will then appear that allows you to drag and drop or choose your file. Enter the name and description for your newly added file.



If you uploaded the file by mistake, click on the red circle with the “x” in the upper, right corner of the box with the file’s information. If you have uploaded the desired files and everything looks correct, click the blue “Save” button in either the top, right corner or bottom, center of the screen.

The screenshot shows the 'Attachments' form with two file upload boxes. The first box is for 'All BRB Points.xlsx' (14.1 KB) with a description 'Excel file containing survey points'. The second box is for 'jpg.074806\_20190607' (5.12 MB) with a description 'Photo of high water at east pier'. Both boxes have a red 'x' in the top right corner. The 'Save' buttons are circled in green.

Clicking “Save” will bring you back to the change order screen. Attached files will display as shown in the screenshot below. These files can be downloaded for viewing by clicking on the blue circle with the down arrow on the left side of the file information line.

The screenshot shows the 'Attachments' list with two files. The first file is '20190607\_074806.jpg' with a description 'Photo of high water at east pier' and a submission date of '02/22/2023 11:32 AM EST'. The second file is 'All BRB Points.xlsx' with a description 'Excel file containing survey points' and a submission date of '02/22/2023 11:22 AM EST'. Both files have a blue circle with a down arrow icon on the left side, which is circled in green. The text 'Displaying all 2 attachments' is at the bottom.

| Name                | Description                         | Submission Date         |
|---------------------|-------------------------------------|-------------------------|
| 20190607_074806.jpg | Photo of high water at east pier    | 02/22/2023 11:32 AM EST |
| All BRB Points.xlsx | Excel file containing survey points | 02/22/2023 11:22 AM EST |

When printed, attachments will show at the end of the change order as shown in the screenshot below.

| <b>Attachments</b>  |                     |                                     |                         |
|---------------------|---------------------|-------------------------------------|-------------------------|
| <b>Document</b>     | <b>Name</b>         | <b>Description</b>                  | <b>Submission Date</b>  |
| 20190607_074806.jpg | 20190607_074806.jpg | Photo of high water at east pier    | 02/22/2023 11:32 AM EST |
| All_BRB_Points.xlsx | All BRB Points.xlsx | Excel file containing survey points | 02/22/2023 11:22 AM EST |
| 2 attachments       |                     |                                     |                         |

All information entered in any of the change order screens or tabs will update and display in the main change order view. An example is shown below.

**21-C021-153** Under Construction

STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

[Submit For Approval](#) [Actions](#) [Reports](#)

### Change Order [Edit](#)

|  |  |
|--|--|
| <b>Date Created</b><br>02/21/2023  | <b>Status</b><br>Draft                                     |
| <b>Summary</b>   | <b>Type</b><br>Non-Significant - Federal-aid Participating |
| <b>Description</b><br>Appia Instructions   | <b>Total Proposed Amount</b><br>\$26,713.00                |
| <b>B - Reason for change:</b><br>Appia Instructions  |  |
| <b>C - Settlement for cost(s) of change as follows with items addressed in Sections F and/or G:</b><br>Appia Instructions              |  |
| <b>D - Justification for cost(s) ( See I.M. 6.000 Attachment D, Chapter 2.36, for acceptable justification):</b><br>Appia Instructions |  |
| <b>E - Contract time adjustment:</b><br>Appia Instructions   |  |

| Quantity Changes  |   |      |                 |                 |                |            |                        | Edit |
|---|---|------|-----------------|-----------------|----------------|------------|------------------------|------|
| Line Number   | Item ID   | Unit | Quantity Before | Quantity Change | Quantity After | Unit Price | Extension Change       |      |
| Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS |   |      |                 |                 |                |            |                        |      |
| 0030  | 2214-5145150                                    | SY   | 74,947.000      | -120.000        | 74,827.000     | \$1.350    | -\$162.00              |      |
| PAVEMENT SCARIFICATION  |   |      |                 |                 |                |            |                        |      |
|   | 001 CLAY CO FM 21-C021-154                      |      | 0.000           | 0.000           | 0.000          | \$1.350    | \$0.00                 |      |
|   | 001 CLAY CO LOCAL 21-C021-153                   |      | 0.000           | 0.000           | 0.000          | \$1.350    | \$0.00                 |      |
|   | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 |      | 74,947.000      | -120.000        | 74,827.000     | \$1.350    | -\$162.00              |      |
| 0060  | 2301-9091000                                    | EACH | 6.000           | 3.000           | 9.000          | \$25.000   | \$75.00                |      |
| RUMBLE STRIP PANEL (PCC SURFACE)                                      |   |      |                 |                 |                |            |                        |      |
|   | 001 CLAY CO FM 21-C021-154                      |      | 0.000           | 0.000           | 0.000          | \$25.000   | \$0.00                 |      |
|   | 001 CLAY CO LOCAL 21-C021-153                   |      | 0.000           | 1.000           | 1.000          | \$25.000   | \$25.00                |      |
|   | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 |      | 6.000           | 2.000           | 8.000          | \$25.000   | \$50.00                |      |
|   |   |      |                 |                 |                |            | <b>Total: -\$87.00</b> |      |
| New Items   |   |      |                 |                 |                |            |                        | Edit |
| Line Number   | Item ID   | Unit | Quantity        | Unit Price      | Extension      |            |                        |      |
| Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS |   |      |                 |                 |                |            |                        |      |
| 8001  | 2217-1000000                                    | SY   | 160.000         | \$30.000        | \$4,800.00     |            |                        |      |
| RUBBLIZED PAV'T   |   |      |                 |                 |                |            |                        |      |

|   |              |    |         |           |                           |
|---|--------------|----|---------|-----------|---------------------------|
| 8002  | 2301-0690180 | SY | 100.000 | \$220.000 | \$22,000.00               |
| BRIDGE APPROACH, RK-18                                  |              |    |         |           |                           |
| 001 CLAY CO LOCAL 21-C021-153: 20.000                   |              |    |         |           |                           |
| 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153: 80.000 |              |    |         |           |                           |
|   |              |    |         |           | <b>Total: \$26,800.00</b> |

**Time Limit Changes** Edit

| Type         | Original Deadline | Current Deadline | Proposed Extension | Proposed Deadline |
|--------------|-------------------|------------------|--------------------|-------------------|
| Working Days | 80.0 Days         | 80.0 Days        | 2.0 Days           | 82.0 Days         |

**New Time Limits** Edit

| Description  | Liquidated Damages per Day | Deadline          |
|--|----------------------------|-------------------|
| Working Days, Late Start Date - 03/12/2024, Liquidated Damage Rate - 1,500 | \$0.00                     | 40.0 Working Days |

Displaying 1 time limits

**Attachments** Edit

| Name                | Description                         | Submission Date         |
|---------------------|-------------------------------------|-------------------------|
| 20190607_074806.jpg | Photo of high water at east pier    | 02/22/2023 11:32 AM EST |
| All BRB Points.xlsx | Excel file containing survey points | 02/22/2023 11:22 AM EST |

Displaying all 2 attachments

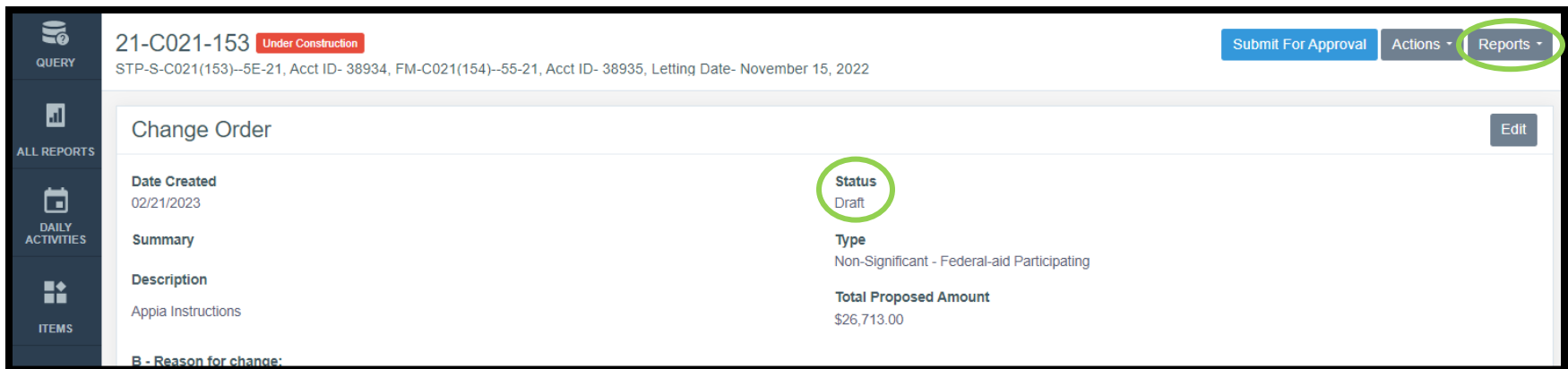


#### D. Producing a PDF of the Change Order

When all of the necessary and pertinent information has been entered into the change order, generate a PDF of the draft change order by clicking on the gray “Reports” pull-down in the upper, right corner of the change order screen. (Note: The change order “report” is NOT in the “All Reports” menu in Appia.)

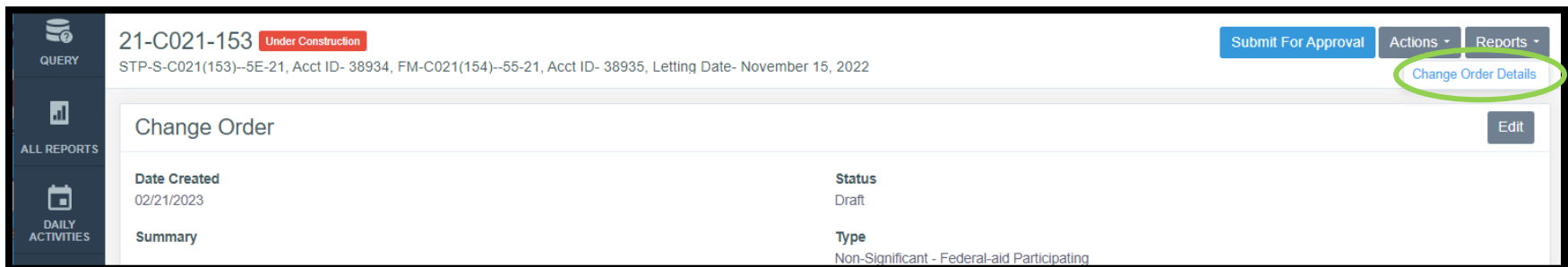
Note: Except for FM-only and locally funded projects, do NOT click on the “Submit for Approval” button until the Administering Bureau has approved the draft change order. For further guidance on when to apply approvals, see Section [E. Approval Process for Change Orders](#). (FM-only and locally funded projects do not require pre-approval from the Administering Office.)

You can see the status the change order is currently in under “Status”.




The screenshot shows the change order interface for ID 21-C021-153, which is in an "Under Construction" state. The top right corner features a "Submit For Approval" button, an "Actions" dropdown, and a "Reports" dropdown menu, which is circled in green. The main content area displays the "Change Order" details, including the date created (02/21/2023), a "Status" field showing "Draft" (circled in green), the type "Non-Significant - Federal-aid Participating", and a total proposed amount of \$26,713.00. A sidebar on the left contains navigation options: QUERY, ALL REPORTS, DAILY ACTIVITIES, and ITEMS.

From the “Reports” pull-down menu, select “Change Order Details”.



This screenshot is identical to the previous one, but the "Reports" dropdown menu is open, and the "Change Order Details" option is highlighted with a green circle. The "Status" field remains circled in green. The interface elements and data are consistent with the previous screenshot.

A PDF of the change order will be download in your browser. Save the PDF to the desired location on your device or server. Change orders that are in “Draft” status will print with a “DRAFT” stamp across them. When the change order has been “Submitted for Approval”, the status will show as “Pending”. When the change order has been “Approved”, the status will show as “Approved”.

|   |  |
|---|--|
|  <b>Iowa Local Systems _DEMO ACCOUNT</b><br><b>Change Order Details</b><br>21-C021-153 |  |
| <b>Description</b>  | STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--5S-21, Acct ID- 38935, Letting Date- November 15, 2022 |
| <b>Prime Contractor</b>   | CEDAR VALLEY CORP., LLC.<br>2637 WAGNER ROAD<br>WATERLOO, IA   |
| <b>Change Order</b>   | 1  |
| <b>Status</b>   | Draft  |
| <b>Date Created</b>   | 02/21/2023   |
| <b>Type</b>   | Non-Significant - Federal-aid Participating  |
| <b>Change Order Description</b>   | Appia Instructions   |
| <b>Awarded Project Amount</b>   | \$4,553,445.96   |
| <b>Authorized Project Amount</b>  | \$4,553,445.96   |
| <b>Change Order Amount</b>  | \$26,713.00  |
| <b>Revised Project Amount</b>   | \$4,580,158.96   |
| <b>B - Reason for change:</b>   |  |
| Appia Instructions  |  |
| <b>C - Settlement for cost(s) of change as follows with items addressed in Sections F and/or G:</b>   |  |
| Appia Instructions  |  |
| <b>D - Justification for cost(s) (See I.M. 6.000 Attachment D, Chapter 2.36, for acceptable justification):</b>   |  |
| <hr/> Change Order Details: <span style="float: right;">02/22/2023</span><br>21-C021-153 <span style="float: right;">Page 1 of 4</span>                                 |  |

Appia Instructions

E - Contract time adjustment:

Appia Instructions

**Increases/Decreases**

| Line Number  | Item ID      | Unit  | Unit Price | Current    |              | Change   |           | Revised    |              |
|--|--------------|---|------------|------------|--------------|----------|-----------|------------|--------------|
|  |              |   |            | Quantity   | Amount       | Quantity | Amount    | Quantity   | Amount       |
| <b>Section: 0001 - STP-S-C021(153)--SE-21, Acct ID- 38934, ROADWAY ITEMS</b> |              |   |            |            |              |          |           |            |              |
| 0030   | 2214-5145150 | SY  | \$1.350    | 74,947.000 | \$101,178.45 | -120.000 | -\$162.00 | 74,827.000 | \$101,016.45 |
| PAVEMENT SCARIFICATION   |              |   |            |            |              |          |           |            |              |
| <b>Funding Details</b>   |              |   |            |            |              |          |           |            |              |
|  |              | 001 CLAY CO FM 21-C021-154                      |            | 0.000      | \$0.00       | 0.000    | \$0.00    | 0.000      | \$0.00       |
|  |              | 001 CLAY CO LOCAL 21-C021-153                   |            | 0.000      | \$0.00       | 0.000    | \$0.00    | 0.000      | \$0.00       |
|  |              | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 |            | 74,947.000 | \$101,178.45 | -120.000 | -\$162.00 | 74,827.000 | \$101,016.45 |
| 0060   | 2301-9091000 | EACH  | \$25.000   | 6.000      | \$150.00     | 3.000    | \$75.00   | 9.000      | \$225.00     |
| RUMBLE STRIP PANEL (PCC SURFACE)   |              |   |            |            |              |          |           |            |              |
| <b>Funding Details</b>   |              |   |            |            |              |          |           |            |              |
|  |              | 001 CLAY CO FM 21-C021-154                      |            | 0.000      | \$0.00       | 0.000    | \$0.00    | 0.000      | \$0.00       |
|  |              | 001 CLAY CO LOCAL 21-C021-153                   |            | 0.000      | \$0.00       | 1.000    | \$25.00   | 1.000      | \$25.00      |
|  |              | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 |            | 6.000      | \$150.00     | 2.000    | \$50.00   | 8.000      | \$200.00     |
| 2 items  |              |   | Totals     |            | \$101,328.45 |          | -\$87.00  |            | \$101,241.45 |

Change Order Details:  
21-C021-153

02/22/2023  
Page 2 of 4

**New Items**

| Line Number  | Item ID   | Unit | Quantity | Unit Price | Extension          |
|--|---|------|----------|------------|--------------------|
| <b>Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS</b> |   |      |          |            |                    |
| 8001   | 2217-1000000                                    | SY   | 160.000  | \$30.000   | \$4,800.00         |
| RUBBLIZED PAV'T  |   |      |          |            |                    |
| <b>Funding Details</b>   |   |      |          |            |                    |
|  | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 |      | 160.000  | \$30.000   | \$4,800.00         |
| 8002   | 2301-0690180                                    | SY   | 100.000  | \$220.000  | \$22,000.00        |
| BRIDGE APPROACH, RK-18   |   |      |          |            |                    |
| <b>Funding Details</b>   |   |      |          |            |                    |
|  | 001 CLAY CO LOCAL 21-C021-153                   |      | 20.000   | \$220.000  | \$4,400.00         |
|  | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 |      | 80.000   | \$220.000  | \$17,600.00        |
| 2 items  |   |      |          |            | Total: \$26,800.00 |

**Funding Summary**

| Fund Package                                    | Original Amount | Authorized Amount | Proposed Change | Revised Amount |
|---|-----------------|-------------------|-----------------|----------------|
| 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 | \$2,764,180.92  | \$2,764,180.92    | \$22,288.00     | \$2,786,468.92 |
| 001 CLAY CO LOCAL 21-C021-153                   | \$5,475.00      | \$5,475.00        | \$4,425.00      | \$9,900.00     |
| 001 CLAY CO FM 21-C021-154                      | \$1,783,790.04  | \$1,783,790.04    | \$0.00          | \$1,783,790.04 |
| 3 fund packages                                 | \$4,553,445.96  | \$4,553,445.96    | \$26,713.00     | \$4,580,158.96 |

Change Order Details:  
21-C021-153

02/22/2023  
Page 3 of 4

### Time Limit Changes

| Type   | Original Deadline | Current Deadline | Proposed Extension | Proposed Deadline |
|--|-------------------|------------------|--------------------|-------------------|
| Working Days   | 80.0 Days         | 80.0 Days        | 2.0 Days           | 82.0 Days         |
| Working Days, Late Start Date - 05/22/2023, Liquidated Damage Rate - 1,600 |                   |                  |                    |                   |
| 1 time limit   |                   |                  |                    |                   |

### New Time Limits

| Type   | Proposed Deadline | Proposed Cost per Day |
|--|-------------------|-----------------------|
| Working Days   | 40.0 Working Days | \$0.00                |
| Working Days, Late Start Date - 03/12/2024, Liquidated Damage Rate - 1,500 |                   |                       |
| 1 time limit   |                   |                       |

### Attachments

| Document            | Name                | Description                         | Submission Date         |
|---------------------|---------------------|-------------------------------------|-------------------------|
| 20190607_074806.jpg | 20190607_074806.jpg | Photo of high water at east pier    | 02/22/2023 11:32 AM EST |
| All_BRB_Points.xlsx | All BRB Points.xlsx | Excel file containing survey points | 02/22/2023 11:22 AM EST |
| 2 attachments       |                     |                                     |                         |

## E. Approval Process for Change Orders

### **City Projects**

City projects are reimbursement-style projects. These projects do not get processed through the Contractor Pay System (CPS). Reimbursement-style projects will not follow the automated process and will not be transmitted directly to the Finance Bureau for processing.

For reimbursement-style projects, PDF change orders are created and are manually uploaded to Doc Express. Alternately, for these projects, cities may take advantage of the Appia-Doc Express integration that allows for direct transmittal of documents from Appia to Doc Express and for the return of Doc Express transition statuses to Appia. However, the use of this integration is not required.

### **County Projects NOT on the Farm-to-Market System**

County projects that are not on the Farm-to-Market system are reimbursement-style projects. These projects do not get processed through the Contractor Pay System (CPS). Reimbursement-style projects will not follow the automated process and will not be transmitted directly to the Finance Bureau for processing.

For reimbursement-style projects, PDF change orders are created and are manually uploaded to Doc Express. Alternately, for these projects, counties may take advantage of the Appia-Doc Express integration that allows for direct transmittal of documents from Appia to Doc Express and for the return of Doc Express transition statuses to Appia. However, the use of this integration is not required.

### **County Projects ON the Farm-to-Market System LET PRIOR TO JANUARY 2024**

For projects let prior to January 2024, change orders for CPS projects (county projects on the Farm-to-Market system) are generated in Appia and are placed in Doc Express. The Local Systems Regional Field Engineer or Technician then sends them to the Finance Bureau at [DOT.LocalSystems@iowadot.us](mailto:DOT.LocalSystems@iowadot.us) if the project includes State-aid or Federal-aid funding. For FM-only projects, the county sends them to the Finance Bureau at [DOT.LocalSystems@iowadot.us](mailto:DOT.LocalSystems@iowadot.us) directly. These projects will not follow the automated payment process and will not be transmitted directly to the Finance Bureau for processing.

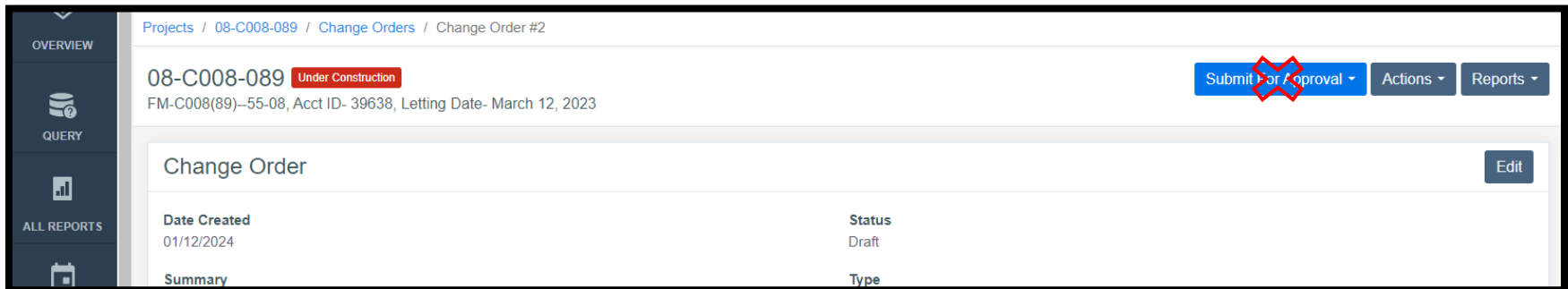
Alternately, for these projects, counties may take advantage of the Appia-Doc Express integration that allows for direct transmittal of documents from Appia to Doc Express and for the return of Doc Express transition statuses to Appia. However, the use of this integration is not required.

**County Projects ON the Farm-to-Market System LET JANUARY 2024 OR LATER**

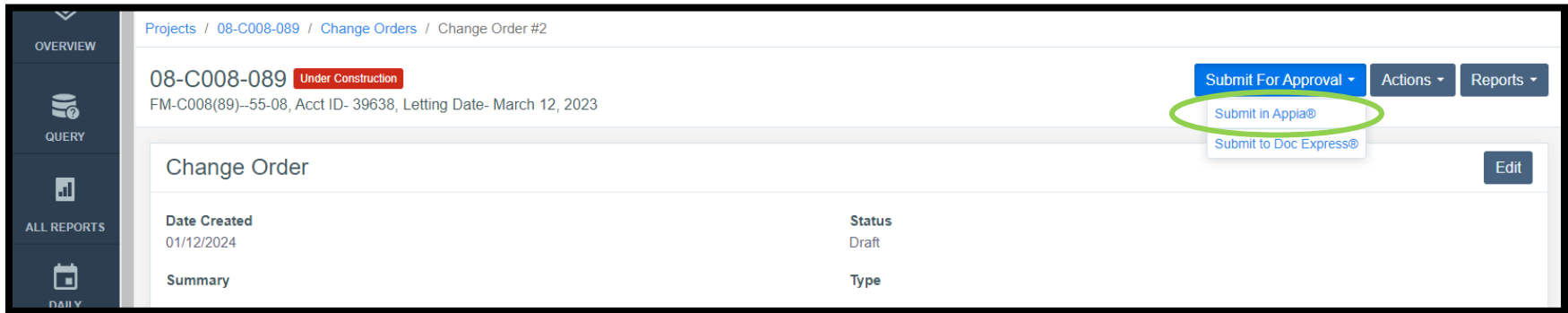
For projects let on or after January 2024, change orders for CPS projects (county projects on the Farm-to-Market system) must follow the automated process. These change orders are generated in Appia, submitted to Doc Express via Appia, signed in Doc Express, updated in Appia, and sent directly to the Finance Bureau from Appia for processing.

1) Submitting Change Orders for Approval NOT Using the Doc Express Integration

Step 1: When all of the necessary and pertinent information has been entered into the change order, send a PDF of the DRAFT change order to the Administering Bureau. For Local Systems, this would be your Field Technician. For Systems Planning, this would be the Grant Manager and the Plan Review and Contract Support Specialist. The Administering Bureau will mark up the document and/or provide feedback on any changes necessary. See the Producing a PDF of the Change Order section for guidance on producing the change order “report” to send to the Administering Bureau.



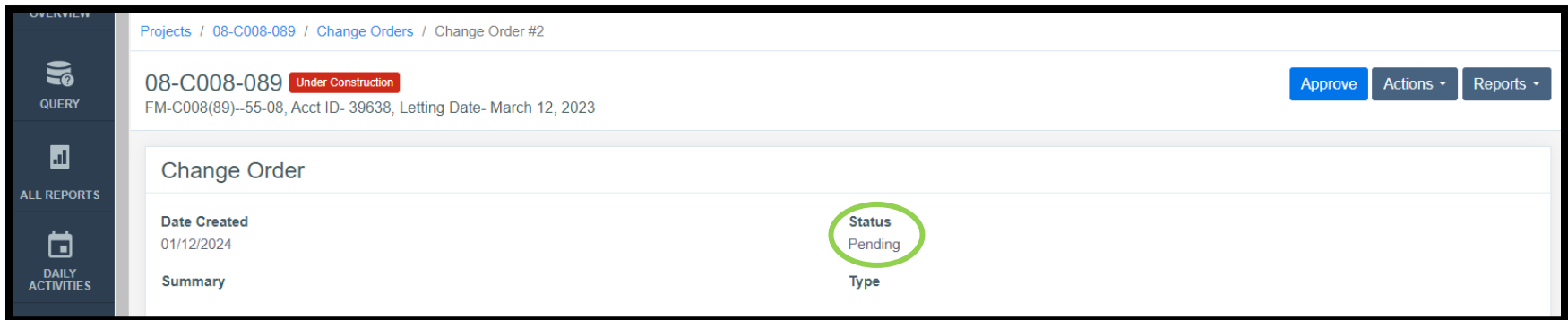
**Step 2:** Correspond with the Administering Bureau and make the requested changes. Send another draft copy of the PDF with all changes incorporated to the Administering Bureau for their final “ok”. Once all edits have been made and the Administering Bureau has approved the draft copy, click the blue “Submit for Approval” button near the top, right corner of the screen. You then have two options for approval: “Submit in Appia” or “Submit to Doc Express”. Choose the “Submit in Appia” option. This will change the status of the change order to “Pending”.



The screenshot shows the 'Change Order' page for project 08-C008-089. The status is 'Under Construction' and 'Draft'. The 'Submit For Approval' dropdown menu is open, showing 'Submit in Appia' as the selected option. Other options include 'Submit to Doc Express'. The page also shows 'Actions' and 'Reports' buttons, and an 'Edit' button.

| Date Created | Status |
|--------------|--------|
| 01/12/2024   | Draft  |

| Summary | Type |
|---------|------|
|---------|------|



The screenshot shows the 'Change Order' page for project 08-C008-089. The status is now 'Pending'. The 'Approve' button is visible. The 'Status' field in the table below is circled in green.

| Date Created | Status  |
|--------------|---------|
| 01/12/2024   | Pending |

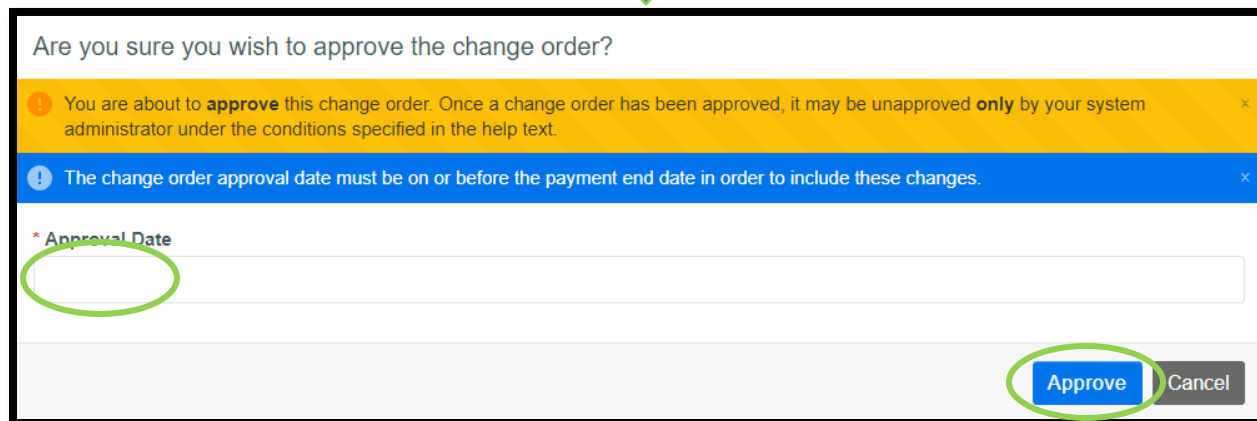
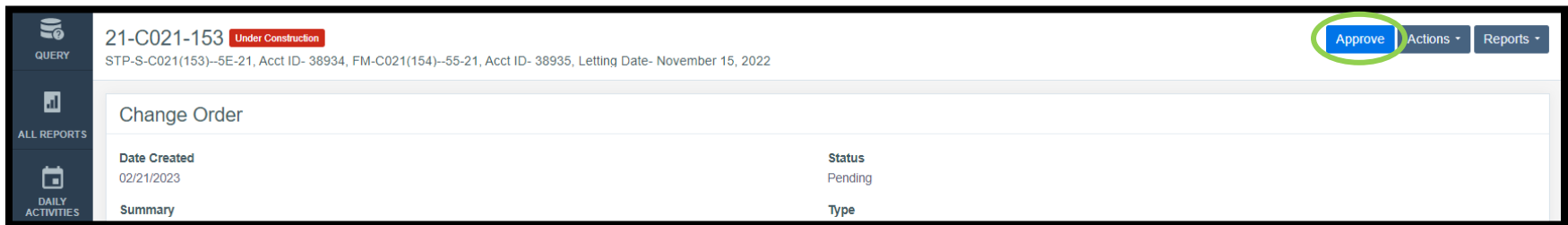
| Summary | Type |
|---------|------|
|---------|------|

Note: Once the change order is in “Pending” status, items within it can be posted in an Item Posting in Daily Reports.



**Step 3:** Generate a new PDF of the change order document following the steps in Section [D. Producing a PDF of the Change Order](#). Upload this “Pending” status change order to Doc Express for all parties’ signatures.

**Step 4:** Once all signatures have been applied in Doc Express and the document has been transitioned to ‘Completed’ status, click the “Approve” button near the top, right corner of the change order screen. You will be prompted to add the Approval Date. The Approval Date is the date the change order was transitioned to “Completed” in Doc Express. After entering the Approval Date, click on the blue Approve button. This will change the status of the change order to “Approved”.



21-C021-153 Under Construction Undo Approval Reports

STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

### Change Order

|                                    |                           |
|------------------------------------|---------------------------|
| <b>Approval Date</b><br>02/08/2023 | <b>Status</b><br>Approved |
| <b>Summary</b>                     | <b>Type</b>               |

Step 5: Your change order has now been finalized. Change order items will now be available for incorporation into Payments.

## 2) Submitting Change Orders for Approval Using the Doc Express Integration

Note: In order to submit a change order for approval using the method described in this section, the Appia project must be integrated with the associated Doc Express Contract. If you have not enabled that integration yet, you will need to do so. Please see the [Integrating Appia with Doc Express for Submittals](#) section.

**Note: For county FM projects let on or after January 2024, in order to make the automated process work, the “CPS Contractor Pay Finance” user must be added to the project, and the API Access for this user must be toggled “On”. If “CPS Contractor Pay Finance” is not currently a user in the project, or if that user’s API Access is not toggled “On” in the default/global user list, address those issues before proceeding. See the Default Settings: Users – Adding/Deleting, Roles, Project Access, Licenses and the Project Settings sections in the [Appia Project Creation & Account Management Instructions](#) for guidance on adding the “CPS Contractor Pay” user and on the API Access toggle.**

Step 1: When all of the necessary and pertinent information has been entered into the change order, send a PDF of the DRAFT change order to the Administering Bureau. For Local Systems, this would be your Field Technician. For Systems Planning, this would be the Grant Manager and the Plan Review and Contract Support Specialist. The Administering Bureau will mark up the document and/or provide feedback on any changes necessary. See the [Producing a PDF of the Change Order](#) section for guidance on producing the change order “report” to send to the Administering Bureau.

21-C021-153 Under Construction

STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

Submit for Approval Actions Reports

### Change Order

Edit

| Date Created | Status |
|--------------|--------|
| 02/21/2023   | Draft  |

| Summary | Type |
|---------|------|
|---------|------|

Step 2: Correspond with the Administering Bureau and make the requested changes. Send another draft copy of the PDF with all changes incorporated to the Administering Bureau for their final “ok”. Once all edits have been made and double-checked (don’t forget to override the line numbers on the new items to 8000 numbers!) and the Administering Bureau has approved the draft copy, the change order needs to be “Submitted for Approval”. For these automated change orders, “Approval” includes approvals in both Doc Express and Appia. To submit a change order for approval, click on the blue “Submit for Approval” button in the top, right corner. A pull-down menu will appear with two options: “Submit in Appia®” and “Submit to Doc Express®”. Click on the “Submit to Doc Express®” option.

Projects / 08-C008-089 / Change Orders / Change Order #1

08-C008-089 Under Construction

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

**Submit For Approval** **Actions** **Reports**

Submit in Appia®  
**Submit to Doc Express®**

**Change Order** **Edit**

|   |  |
|---|--|
| <b>Date Created</b><br>12/07/2023   | <b>Status</b><br>Draft                                     |
| <b>Summary</b>  | <b>Type</b><br>Non-significant – Federal-Aid Participating |
| <b>Description</b><br>8001- For automated payment process in Appia instructions | <b>Total Proposed Amount</b><br>\$6,000.00                 |

**Quantity Changes** **Edit**

**No quantity changes found.** x

**New Items** **Edit**

| Line Number | Item ID | Unit | Quantity | Unit Price | Extension |
|-------------|---------|------|----------|------------|-----------|
|-------------|---------|------|----------|------------|-----------|

A pop-up box with pull-down menus will appear where you will select the appropriate Doc Express drawer and type for the document you are submitting. The Change Order drawer is appropriate for change orders.

Submit to Doc Express®

Select the Doc Express® drawer where you want to send this change order. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this change order

Select

Select required type(s)

No types

Submit Cancel

Submit to Doc Express®

Select the Doc Express® drawer where you want to send this change order. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this change order

Select

Change Order

Contract Documents

Estimates and Vouchers

Project Closeout

Weekly Reports

Submit Cancel

Once the Change Order drawer is selected, the type will automatically populate. Click the blue “Submit” button in the lower, right corner.

Submit to Doc Express®

Select the Doc Express® drawer where you want to send this change order. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this change order

Change Order

Select required type(s)

× Change Order

Submit Cancel

You will be returned to the change order. A green ribbon should appear across the top of the screen saying, "The change order has been submitted for approval successfully." and "The change order report has been sent to Doc Express® successfully.". Additionally, the Doc Express® Information now shows for the change order, including the Document Name, Date Submitted to Doc Express, Doc Express Status, and Doc Express Type(s).

The change order has been submitted for approval successfully.  
The change order report has been sent to Doc Express® successfully.

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

Projects / 08-C008-089 / Change Orders / Change Order #1

08-C008-089 Under Construction Approve Actions Reports

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

### Change Order

|   |  |
|---|--|
| <b>Date Created</b><br>12/07/2023   | <b>Status</b><br>Pending                                   |
| <b>Summary</b><br>8001- For automated payment process in Appia instructions | <b>Type</b><br>Non-significant - Federal-Aid Participating |
| <b>Description</b>  | <b>Total Pending Amount</b><br>\$6,000.00                  |

### Doc Express® Information

as of 12/07/2023 05:41 PM EST

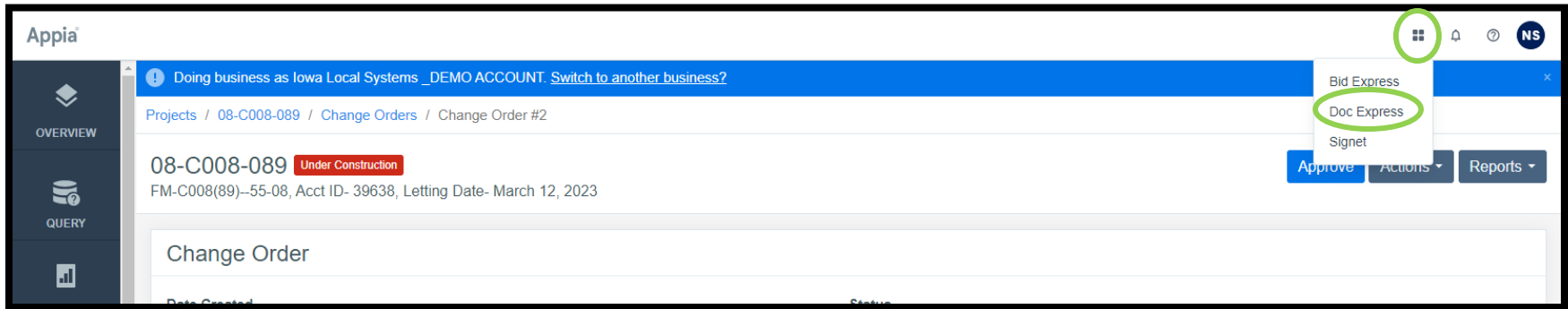
|   |  |                                     |
|---|--|-------------------------------------|
| <b>Document Name</b><br>change_order-1-20231207 - <a href="#">View in Doc Express</a> | <b>Date Submitted to Doc Express</b><br>12/07/2023 | <b>Doc Express Status</b><br>Submit |
| <b>Doc Express Type(s)</b><br>Change Order  |  |                                     |

### New Items

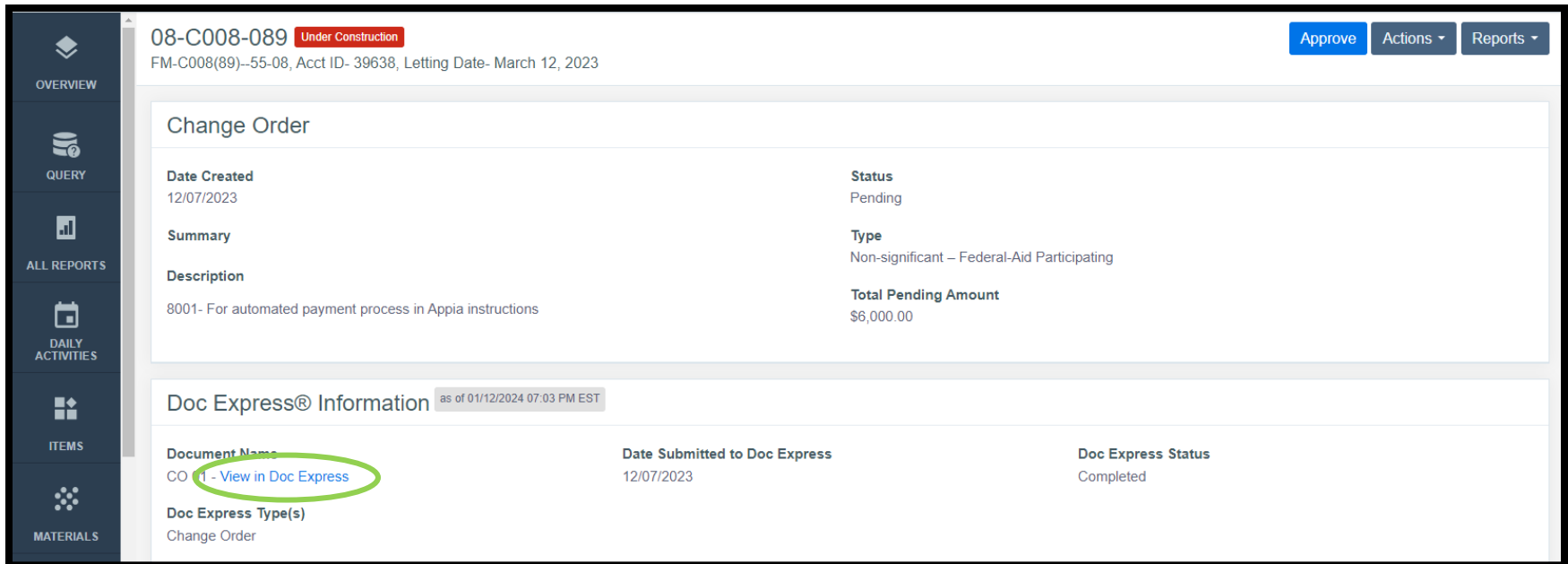
| Line Number | Item ID | Unit | Quantity | Unit Price | Extension |
|-------------|---------|------|----------|------------|-----------|
|-------------|---------|------|----------|------------|-----------|

Section: 0001 - FM-C008(89)--55-08, Acct ID- 39638, ITEMS FOR A TWIN 12' X 9' X 50'-0 REINFORCED CONCRETE BOX CULVERT

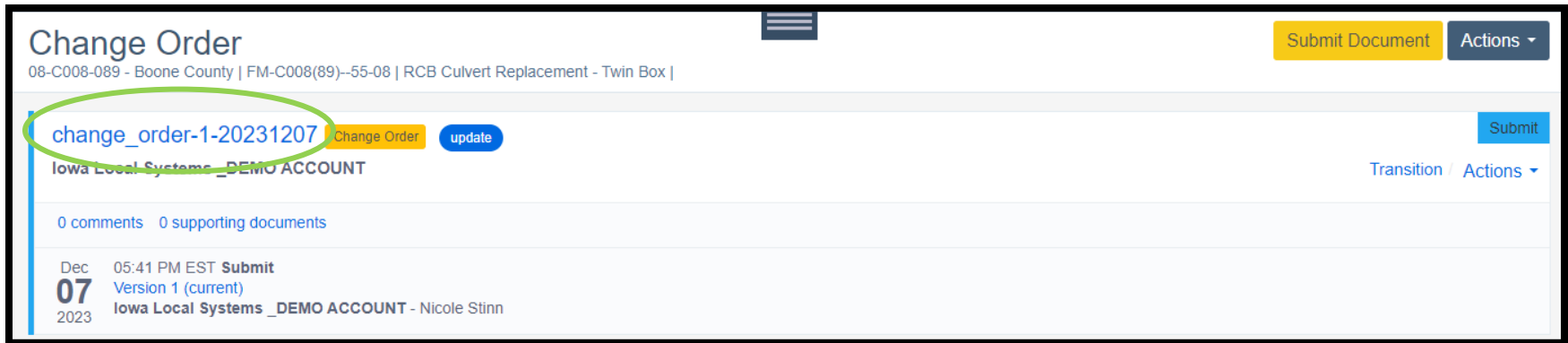
At this point, the document needs to be signed and transitioned in Doc Express by the appropriate people (engineer, PIRC, etc.). Navigate to Doc Express to complete the transition and signature process. You can navigate to Doc Express by either opening a new browser tab and going to the Doc Express website, by clicking on the four-square box in the upper, right corner of the Appia screen and selecting Doc Express, or by clicking on the View Doc Express link found in the Doc Express Information section on the Change Order screen in Appia.



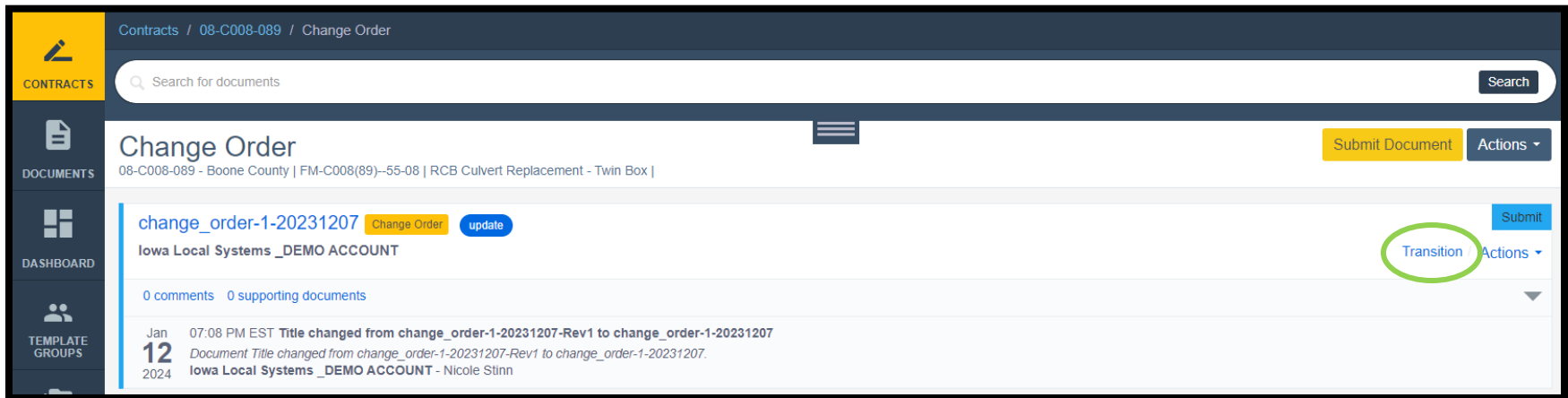
or



Once in Doc Express, select the appropriate contract and the appropriate drawer for the change order being submitted. The change order will show with a name similar to the one shown in the screenshot below. Do NOT update the name of the document.



The appropriate person should now transition the change order. To do so, click on the blue “Transition” text on the right end of the line containing the document.



A pop-up box will appear with a pull-down menu to choose the “Status” and a Comment field. Select the appropriate status from the pull-down menu. The use of the Comment field is optional.



Change Order

### Transition CO 01

**\* Status**

**Comment**

Supporting Documents  
[Add a supporting document?](#)

Change Order

### Transition CO 01

**\* Status**

**Recommended by Engineer / Approved**

Supporting Documents  
[Add a supporting document?](#)

If a Status is selected that requires a signature, a box will automatically appear that says, "Sign this document".

The screenshot shows a software window titled "Transition CO 01" with a red close button in the top right corner. The form contains the following elements:

- Status:** A dropdown menu with the selected value "Recommended by Engineer / Approved".
- Comment:** A large empty text area for entering a comment.
- Supporting Documents:** A section with the text "Supporting Documents" and a blue link "Add a supporting document?".
- Sign this document:** A large, semi-transparent overlay box with the text "Sign this document" in a large, light gray font.
- Checkboxes:**
  - An unchecked checkbox with the text: "By checking this box and entering my name above, I am electronically signing the attached document."
  - An unchecked checkbox with the text: "Transition document to final status of **Completed**?"
- Buttons:** A yellow "Save" button and a gray "Cancel" button are located at the bottom right of the form.

Sign the document by typing your name into the “Sign this document” box and check the box by the signature acknowledgment box. Signatures should ONLY be applied by the person with the authority to approve payments (the project engineer and/or the PIRC).

IF no additional signatures are needed in the workflow (county FM-only projects), check the box for “Transition document to final status of Completed?”. If additional signatures are needed (all projects except county FM-only projects), leave this box un-checked. Then click the yellow “Save” button in the lower, right corner of the box.

Check this box if no further signatures are required on the document. Otherwise, leave it un-checked.

Transition CO 01

\* Status  
Recommended by Engineer / Approved

Comment

Supporting Documents  
[Add a supporting document?](#)

Nicole Stinn

By checking this box and entering my name above, I am electronically signing the attached document.

Transition document to final status of Completed?

Save Cancel

The new status should now show on the right end of the line containing the document. If this status is “Completed”, you are ready to return to the Payment in Appia. If not, the appropriate person/people should transition the document until it reaches the “Completed” status.

**For county projects let on or after January 2024 using the automated process, change orders will NOT transmit to the Finance Bureau unless the Doc Express status is “Completed”!**

Will not be sent to Finance!

This screenshot shows a 'Change Order' document interface. At the top, there is a title 'Change Order' and a subtitle '08-C008-089 - Boone County | FM-C008(89)--55-08 | RCB Culvert Replacement - ...'. On the right side, there are two buttons: 'Submit Document' (yellow) and 'Actions' (dark blue with a dropdown arrow). Below this, the document details are shown: 'CO 01' with a 'Change Order' tag and an 'update' button. The account name is 'Iowa Local Systems \_DEMO ACCOUNT'. There are '0 comments' and '0 supporting documents'. At the bottom, the date and time are 'Dec 05:55 PM EST' and the status is 'Recommended by Engineer / Approved'. A red oval highlights the status text, and a red box with an arrow points to it from the text 'Will not be sent to Finance!'.

This screenshot shows the same 'Change Order' document interface as above, but with a different status. The title and subtitle are identical. The 'Submit Document' and 'Actions' buttons are also present. The document details are the same: 'CO 01' with a 'Change Order' tag, 'Iowa Local Systems \_DEMO ACCOUNT', '0 comments', and '0 supporting documents'. At the bottom, the date and time are 'Dec 05:59 PM EST' and the status is 'Completed'. A green oval highlights the 'Completed' status text.

Once the document has been transitioned to a Completed status, navigate back to the change order in Appia. The Doc Express Status shown should now say "Completed". If the status did not update, refresh the browser page.

Projects / 08-C008-089 / Change Orders / Change Order #1

**08-C008-089** Under Construction Approve Actions Reports

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

### Change Order

|   |  |
|---|--|
| <b>Date Created</b><br>12/07/2023   | <b>Status</b><br>Pending                                   |
| <b>Summary</b>  | <b>Type</b><br>Non-significant – Federal-Aid Participating |
| <b>Description</b><br>8001- For automated payment process in Appia instructions | <b>Total Pending Amount</b><br>\$6,000.00                  |

### Doc Express® Information

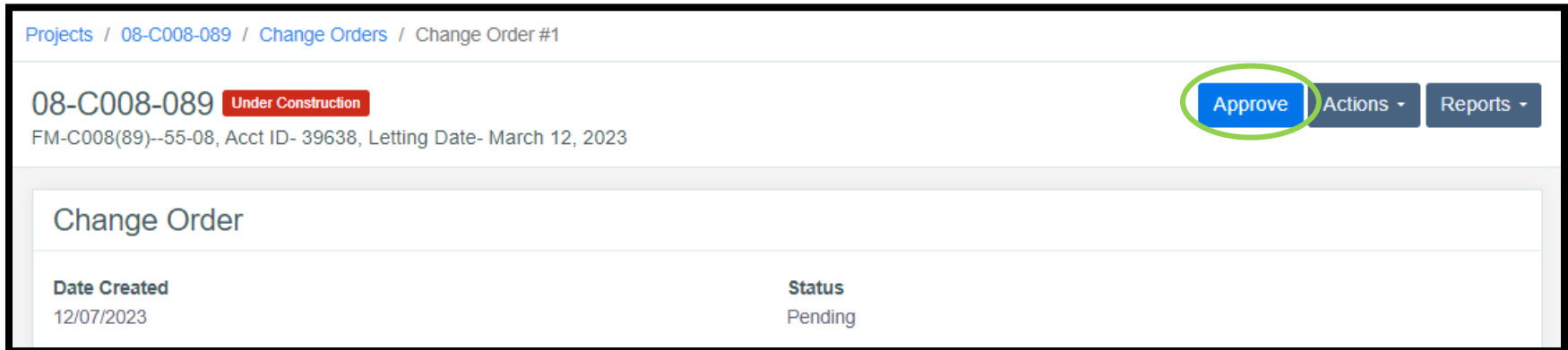
as of 12/07/2023 06:01 PM EST

|   |  |  |
|---|--|--|
| <b>Document Name</b><br>CO 01 - <a href="#">View in Doc Express</a> | <b>Date Submitted to Doc Express</b><br>12/07/2023 | <b>Doc Express Status</b><br>Completed |
| <b>Doc Express Type(s)</b><br>Change Order                          |  |  |

### New Items

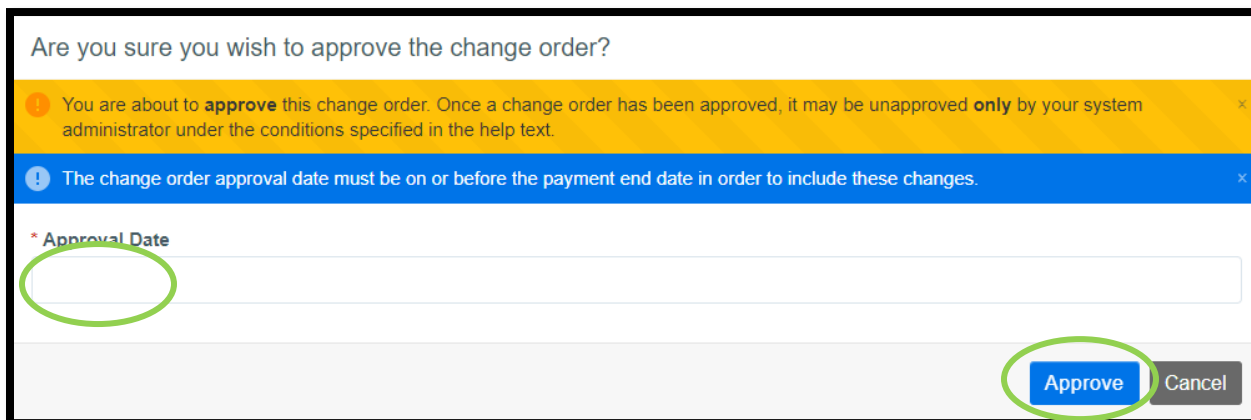
| Line Number  | Item ID      | Unit | Quantity | Unit Price | Extension  |
|--|--------------|------|----------|------------|------------|
| <b>Section: 0001 - FM-C008(89)--55-08, Acct ID- 39638, ITEMS FOR A TWIN 12' X 9' X 50'-0 REINFORCED CONCRETE BOX CULVERT</b> |              |      |          |            |            |
| 8001   | 2402-2720100 | CY   | 60.000   | \$100.000  | \$6,000.00 |
| EXCAVATION, CL 20, RDWY PIPE CULV  |              |      |          |            |            |

Once the Doc Express status of “Completed” is showing in the change order and you are SURE the change order is ready to be submitted to the Finance Bureau for processing, click on the blue “Approve” button in the upper, right corner of the Change Order screen.



The screenshot shows the top section of a web application interface. At the top left, there is a breadcrumb trail: "Projects / 08-C008-089 / Change Orders / Change Order #1". Below this, the main header displays "08-C008-089" followed by a red "Under Construction" status tag. To the right of the header are three buttons: "Approve" (highlighted with a green circle), "Actions" (with a dropdown arrow), and "Reports" (with a dropdown arrow). Below the header, the text "FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023" is visible. The main content area is titled "Change Order" and contains a table with two columns: "Date Created" and "Status". The "Date Created" row shows "12/07/2023" and the "Status" row shows "Pending".

Enter the Approval Date in the pop-up box that appears. The Approval Date is the date the change order was transitioned to Completed in Doc Express. Then click on the blue Approve button.



The screenshot shows a confirmation pop-up box titled "Are you sure you wish to approve the change order?". It contains two warning messages: a yellow one stating "You are about to **approve** this change order. Once a change order has been approved, it may be unapproved **only** by your system administrator under the conditions specified in the help text." and a blue one stating "The change order approval date must be on or before the payment end date in order to include these changes." Below the messages is a form field labeled "\* Approval Date" which is circled in green. At the bottom right of the pop-up, there are two buttons: "Approve" (highlighted with a green circle) and "Cancel".

**For contracts let in January 2024 or later, clicking “Approve” WILL send the change order to Finance. Do NOT email the change order report to the [DOT.LocalSystems@iowadot.us](mailto:DOT.LocalSystems@iowadot.us) email address also. Emailing the change order will cause confusion and errors. If you do not receive any communications to the contrary, YOUR CHANGE ORDER WENT THROUGH SUCCESSFULLY.**

# 11 - Punch List

(Reserved for Punch List instructions)

This section is reserved for future instruction on using the Punch List tab.

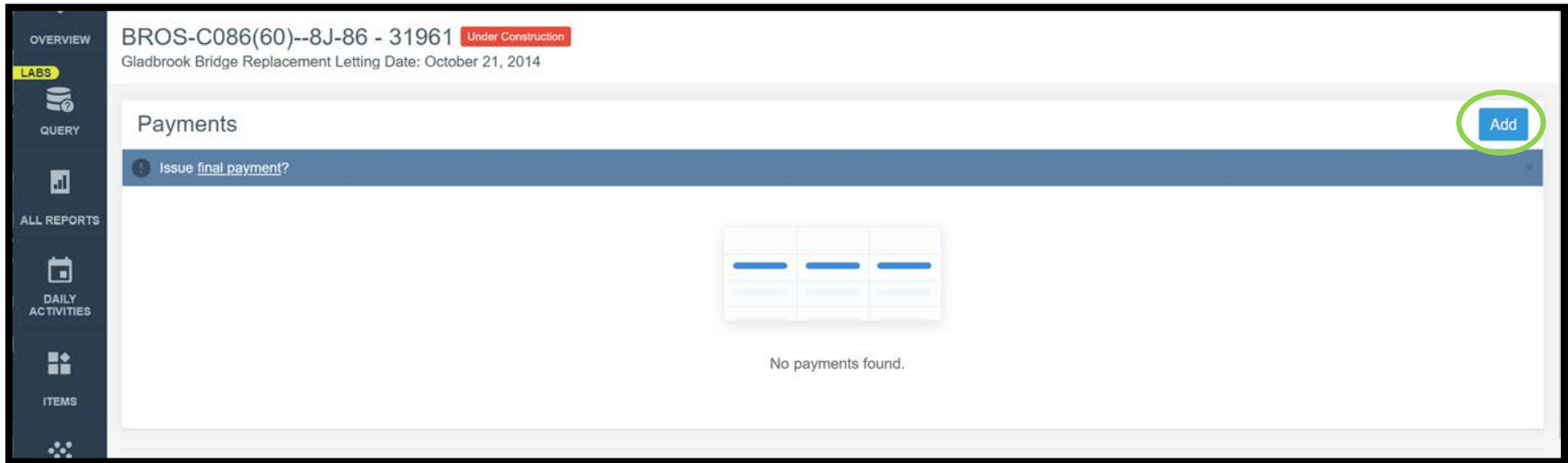


# 12 - Payments

To access the Payments section, click on the Payments button in the left menu.

The screenshot displays a software interface for project management. On the left is a dark sidebar with navigation options: TIME LIMITS, CHANGE ORDERS, FORCE ACCOUNTS, PUNCH LIST, **PAYMENTS** (highlighted with a red circle), CONTRACTORS, and FUNDING. The main content area shows an 'Overview' for project '08-C008-089' (Under Construction), with details like 'Acct ID- 39638' and 'Letting Date- March 12, 2023'. The overview is divided into sections: General Information (Project, Work Type: RCB CULVERT REPLACEMENT - TWIN BOX, Location: On 150TH ST, Over TRIB. OF SQUAW CREEK, S36 T85 R25, Management: Prime Contractor DIXON CONSTRUCTION CO., Created By Douglas Heeren), and summary metrics (Awarded Amount: \$517,966.75, Authorized Amount: \$517,966.75, Approved Changes: \$0.00). An 'Amount Paid' section shows 0% of awarded, authorized, and approved amounts. An 'Important Dates' section is also present.

When Payments has been selected and no payments have been made to date, the following screen will appear. Click on the blue “Add” button in the top, right corner to prepare a payment for processing.



If other payments have been made to date, the previous payments and their statuses will be shown on a listing on this screen. Click on the blue “Add” button in the top, right corner to prepare a payment for processing.



When a new payment is added, or an existing payment is opened for editing, the following screen will appear. There are five tabs across the top: Overview, Summary, Work Performed, Stockpiles (if stockpiled materials are being paid in the payment) and Attachments. A sixth Exclusions tab will show if any Daily Reports are being excluded from the payment.

### A. Overview Tab

Some information is automatically populated, but the “From”/”To” Dates, the Retainage information, the Approval Date, the Payment Date, and any additional Remarks must be entered by the user.

- From/To Dates: Be sure to enter a date range which covers only items that have certifications unless the quantity for a non-certified item has been adjusted to 0.00 as explained in the [Entering Item Posting for Items Without Certifications or Without Certified Payrolls](#) subsection of these instructions.
  - Note: The “To Date” date will populate with the day the payment is created. If you do not complete the payment the day you create it and you wish to go back later and add coverage for work on additional days, you will need to adjust the To Date.
- Retainage – Retain: **For the first payment on any contract, make sure to enter the retainage percentage (3.000% for projects using Iowa DOT Standard Specifications).** (This percentage will then stay there for future payments and will not have to be input every time.)
- Retainage – Release: This should be kept at \$0.00 until approval has been given by Local Systems to release the retainage. This will generally happen after a project has been reviewed/audited or the review has been waived or when a contractor requests an early retainage release.
  - Note: For projects using a standard payment voucher for the final voucher, when generating a final voucher, the payment process described here will be used, and retainage will be released using this field. Appia’s final voucher will NOT be used as the final voucher for DOT administered projects. For further guidance on using a standard voucher for the final payment, see the [Standard Payment Voucher for Final Payment](#) section. For guidance on determining which final voucher process to use, see the [Making a Final Payment](#) section.
- Approval Date: Enter the date that the payment was approved.
- Payment Date: This is the date the payment was processed, either by your local agency for reimbursement projects or by the DOT for projects paid from the Farm-to-Market account. **Do NOT enter a payment date until you know the payment has been processed successfully,** and the processed payment matches your Appia voucher. The payment can be approved before entering a payment date.
- Remarks: Enter any relevant remarks or explanations to accompany the voucher. The remarks section should especially contain the words “Semi-Final Voucher” or “Final Voucher” for those respective vouchers.

Once all of the appropriate fields have been filled out, click the blue “Save” button in the top, right corner.

OVERVIEW EXCLUSIONS SUMMARY WORK PERFORMED STOCKPILES ATTACHMENTS

1 daily report has been excluded from payment. See the [Exclusions section](#) for details.

### Edit

**Save** Cancel

| Payment Details     |             | Project Details  |                        |
|---------------------|-------------|------------------|------------------------|
| Payment Number      | 2           | Prime Contractor | DIXON CONSTRUCTION CO. |
| Percent Complete    | 9.0%        |                  |                        |
| Payment Status      | Draft       |                  |                        |
| Item Payment Amount | \$29,500.00 |                  |                        |

| Pay Period  |            | Payment Dates |            |
|-------------|------------|---------------|------------|
| * From Date | 10/05/2023 | * To Date     | 01/12/2024 |
|             |            | Approval Date |            |
|             |            | Payment Date  |            |

| Retainage |        | Retainage Cap Amount                      |
|-----------|--------|---|
| Retain    | 3.000% | \$30,000.00                               |
| Release   | \$0.00 | <a href="#">Edit Project Cap Settings</a> |

Remarks

14px B I U [Text Alignment Icons] [List Icons] A

## B. Exclusions of Daily Reports from Payments

If the From/To Date range of the payment voucher includes Daily Reports which have not been approved, a yellow ribbon will appear across the top of the Overview screen. To view which reports have been excluded, click on either the “Exclusions section” link in the yellow ribbon or the “Exclusions” tab across the top.

The screenshot displays a software interface for managing a payment voucher. At the top, the voucher ID is 'BROS-C086(60)--8J-86 - 31961' with a red 'Under Construction' status. Below this, a yellow notification banner states: '2 daily reports have been excluded from payment. See the Exclusions section for details.' The 'EXCLUSIONS' tab in the top navigation bar is highlighted with a green circle. The main content area is an 'Edit' form with the following sections:

- Payment Details:**
  - Payment Number: 2
  - Payment Status: Draft
  - Percent Complete: 3.6%
  - Item Payment Amount: \$44,608.40
- Project Details:**
  - Prime Contractor: PETERSON CONTRACTORS INC.
  - Managing Office: Tama County Highway Department
  - Project Manager: Nicole Stinn
- Pay Period:**
  - \* From Date: 01/03/2019
  - \* To Date: 01/28/2019
- Payment Dates:**
  - Approval Date: [Empty field]
  - Payment Date: [Empty field]
- Retainage:**
  - Retain: 3.000%
  - Retainage Cap Amount: \$30,000.00

Buttons for 'Save', 'Cancel', and 'Help' are visible. A 'Submit For Approval' button is located in the top right corner.

Any Daily Reports being excluded from the payment will be shown. You will be able to see their status showing they have not yet been approved. Daily Reports will be excluded if they are in either Draft or Pending status. If a Daily Report has been excluded, it means that payment will not be made on any item postings (quantity entries) made that day.

| Date       | Inspector    | Status | Remarks  | Posted Amount |
|------------|--------------|--------|--|---------------|
| 01/22/2019 | Nicole Stinn | Draft  | spoke with Kenny (PCI Foreman) on the phone this morning. They are running into a lot of water in the hole they dug for the pier pilings. Kenny will call me this afternoon and let me know their progress and if they plan to try driving any piling. Kenny did ask if it would be ok to start settin...    | \$0.00        |
| 01/28/2019 | Nicole Stinn | Draft  | Today PCI poured the remaining 5 encasements. They stripped the other 6 piles and wrapped them in plastic to keep the moisture in and then wrapped them in blankets to keep them warm. The 1st truck arrived at 1:30. I tested this trucks concrete. The air was at 6.5% and the slump was at 4". 18 1/4 ... | \$6,849.00    |

If you intended to leave the Daily Report in Draft/Pending status so as not to pay for an item (in the case of missing certs, missing or incorrect payrolls, or for other reasons), simply leave that Daily Report excluded and do nothing on this screen.

If you intended to include items on the excluded reports in the payment you are working on, you can click on the date of the Daily Report in blue on the left side to be taken directly to the Daily Report to submit it for approval. Once approved, you will need to navigate back to the Payments tab to finish inputting/reviewing the payment. Once an excluded report has been approved, you will see that the Payments tab updates so that it no longer shows as an exclusion.

### C. Summary Tab

The Summary tab simply shows a breakdown of components which are being paid. There is nothing you need to enter/adjust on this tab.

OVERVIEW

**LABS**

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDERS

**BROS-C086(60)--8J-86 - 31961** Under Construction

Gladbrook Bridge Replacement Letting Date: October 21, 2014

[Submit For Approval](#) [Actions](#)

OVERVIEW   EXCLUSIONS   **SUMMARY**   WORK PERFORMED   ATTACHMENTS

**Summary** [Save](#) [Cancel](#)

Adjustment       Adjustment Remarks

|                       | Previous   | Current     | To Date     |
|-----------------------|------------|-------------|-------------|
| <b>Credits</b>        |            |             |             |
| Authorized Work       | \$7,565.00 | \$44,608.40 | \$52,173.40 |
| Stockpile Advancement | \$0.00     | \$0.00      | \$0.00      |
| <b>Reductions</b>     |            |             |             |
| Stockpile Recovery    | \$0.00     | \$0.00      | \$0.00      |
| Retainage             | \$226.95   | \$1,338.25  | \$1,565.20  |
| Liquidated Damages    | \$0.00     | \$0.00      | \$0.00      |
| <b>Payment</b>        |            |             |             |
| Adjustment            | \$0.00     | \$0.00      | \$0.00      |
| Retainage Released    | \$0.00     | \$0.00      | \$0.00      |
| Totals                | \$7,338.05 | \$43,270.15 | \$50,608.20 |

[Help](#)



### D. Work Performed Tab

The “Work Performed” tab shows a listing of each item for which payment is being made as part of this payment voucher. You can toggle between a “dollars” view or a “quantity” view by using the “In dollars?” toggle. You should verify that all information looks correct in this tab, but there is nothing for you to enter/adjust.

OVERVIEW LABS QUERY ALL REPORTS DAILY ACTIVITIES ITEMS MATERIALS STOCKPILES TIME LIMITS

BROS-C086(60)--8J-86 - 31961 Under Construction Submit For Approval Actions

Gladbrook Bridge Replacement Letting Date: October 21, 2014

OVERVIEW EXCLUSIONS SUMMARY **WORK PERFORMED** ATTACHMENTS

Work Performed In dollars? YES

| Line Number   | Item ID      | Unit | Authorized  | Previous   | Current     | Overages | Insufficient |
|---|--------------|------|-------------|------------|-------------|----------|--------------|
| Section: 1 - ITEMS FOR A 244'-0 X 30'-0 PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE |              |      |             |            |             |          |              |
| 0010  | 2104-2710020 | CY   | \$25,650.00 | \$0.00     | \$4,800.00  |          |              |
| EXCAVATION, CL 10, CHANNEL  |              |      |             |            |             |          |              |
| 0130  | 2501-0201473 | LF   | \$60,799.20 | \$0.00     | \$30,399.60 |          |              |
| PILES, STEEL, HP 14 X 73  |              |      |             |            |             |          |              |
| 0140  | 2501-5478073 | LF   | \$30,135.60 | \$0.00     | \$8,218.80  |          |              |
| CONCRETE ENCASEMENT OF STEEL H PILES, HP 14 X 73                                      |              |      |             |            |             |          |              |
| Displaying all 3 items  |              |      |             |            |             |          |              |
| Section: 2 - ROADWAY ITEMS  |              |      |             |            |             |          |              |
| 0420  | 2526-8285000 | LS   | \$11,900.00 | \$1,190.00 | \$1,190.00  |          |              |
| CONSTRUCTION SURVEY   |              |      |             |            |             |          |              |
| Displaying 1 item   |              |      |             |            |             |          |              |

If payment is being made on a quantity that exceeds the item’s authorized quantity (contract quantity + quantity authorized by change orders), a red circle with a check mark will appear to the right of the item’s line. **If there is an overage, you should check to make sure it does not exceed the \$50,000 threshold that necessitates a change order. If it does exceed \$50,000 in overage, you must process a change order before proceeding with payment on the full quantity for that item.**

The screenshot shows a software interface for a project titled "BROS-C086(60)--8J-86 - 31961" with a status of "Under Construction". The "Work Performed" tab is active, displaying a table of items. The table has columns for Line Number, Item ID, Unit, Authorized, Previous, Current, Overages, and Insufficient. A red circle with a checkmark is visible in the "Overages" column for item 0140.

| Line Number   | Item ID      | Unit | Authorized  | Previous   | Current     | Overages | Insufficient |
|---|--------------|------|-------------|------------|-------------|----------|--------------|
| Section: 1 - ITEMS FOR A 244'-0 X 30'-0 PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE |              |      |             |            |             |          |              |
| 0010  | 2104-2710020 | CY   | \$25,650.00 | \$0.00     | \$4,800.00  |          |              |
| EXCAVATION, CL 10, CHANNEL  |              |      |             |            |             |          |              |
| 0130  | 2501-0201473 | LF   | \$60,799.20 | \$0.00     | \$30,399.60 |          |              |
| PILES, STEEL, HP 14 X 73  |              |      |             |            |             |          |              |
| 0140  | 2501-5478073 | LF   | \$30,135.60 | \$0.00     | \$31,048.80 | ✓        |              |
| CONCRETE ENCASEMENT OF STEEL H PILES, HP 14 X 73                                      |              |      |             |            |             |          |              |
| Displaying all 3 items  |              |      |             |            |             |          |              |
| Section: 2 - ROADWAY ITEMS  |              |      |             |            |             |          |              |
| 0420  | 2526-8285000 | LS   | \$11,900.00 | \$1,190.00 | \$1,190.00  |          |              |
| CONSTRUCTION SURVEY   |              |      |             |            |             |          |              |
| Displaying 1 item   |              |      |             |            |             |          |              |

Note: The “Item Overruns” report in the “All Reports” tab may be helpful in identifying items with overages as well.

## E. Stockpiles Tab

Any desired attachment can be added to your payment.

Projects / 08-C008-089 / Payments / Payment #2 / Stockpiles

08-C008-089 Under Construction Submit For Approval Actions

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

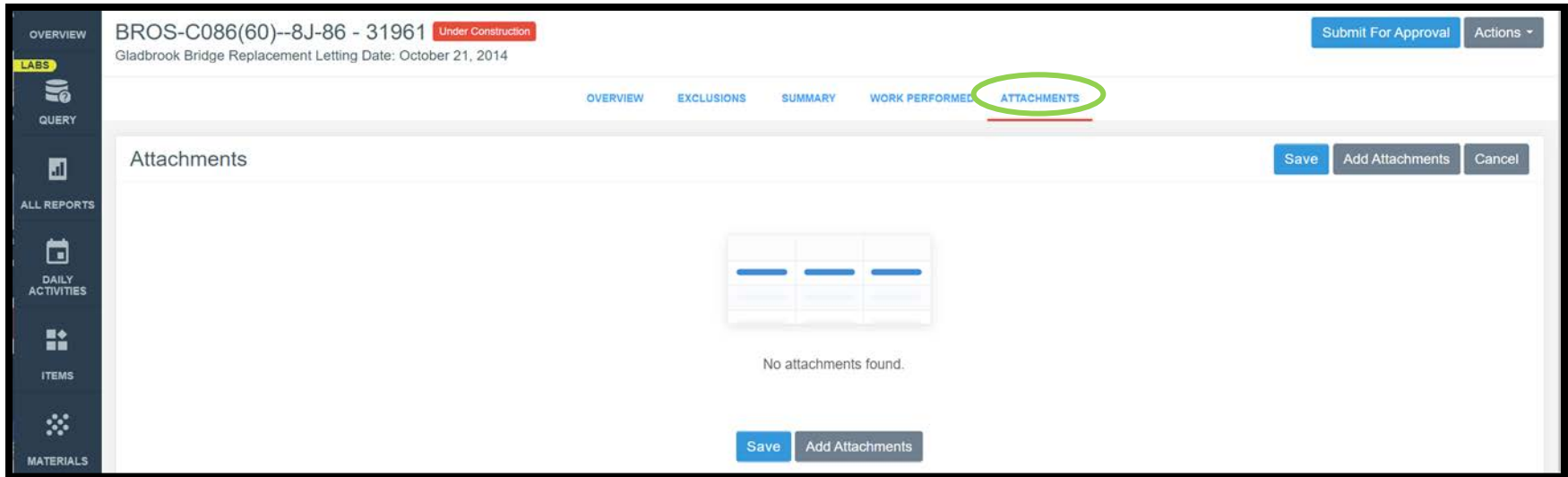
OVERVIEW EXCLUSIONS SUMMARY WORK PERFORMED **STOCKPILES** ATTACHMENTS

### Stockpile Details

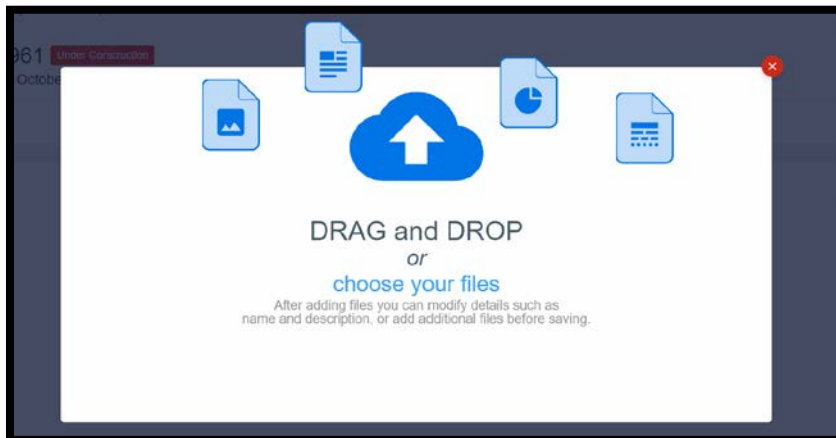
| Stockpile                         | Advancement | Advancement To Date | Recovery | Recovery To Date |
|-----------------------------------|-------------|---------------------|----------|------------------|
| #1 2404-7775000 REINFORCING STEEL | \$20,000.00 | \$20,000.00         | \$0.00   | \$0.00           |
| Totals                            | \$20,000.00 | \$20,000.00         | \$0.00   | \$0.00           |

## F. Attachments Tab

Any desired attachment can be added to your payment.



Just click on the gray "Add Attachments" button and drag and drop the desired file or choose the file by navigating to the location on your computer or device where the attachment is saved.



## G. Approving & Submitting a Payment – FOR CITY, COUNTY NON-FM, & COUNTY FM PROJECTS LET PRIOR TO JANUARY 2024

### **City Projects**

City projects are reimbursement-style projects. These projects do not get processed through the Contractor Pay System (CPS). Reimbursement-style projects will not follow the automated payment process and will not be transmitted directly to the Finance Bureau for processing.

For reimbursement-style projects, PDF pay vouchers are created and are uploaded to Doc Express. Then, a reimbursement request is submitted to the Administering Bureau using the appropriate Claim for Reimbursement form. (See [I.M. 6.110, Attachment E](#) for links to the Claim for Reimbursement forms. See the section titled Estimates and Vouchers Drawer Documents.)

Also, for these projects, cities may take advantage of the Appia-Doc Express integration that allows for direct transmittal of documents from Appia to Doc Express and for the return of Doc Express transition statuses to Appia. However, the use of this integration is not required.

### **County Projects NOT on the Farm-to-Market System**

County projects that are not on the Farm-to-Market system are reimbursement-style projects. These projects do not get processed through the Contractor Pay System (CPS). Reimbursement-style projects will not follow the automated payment process and will not be transmitted directly to the Finance Bureau for processing.

For reimbursement-style projects, PDF pay vouchers are created and are uploaded to Doc Express. Then, a reimbursement request is submitted to the Administering Bureau using the appropriate Claim for Reimbursement form. (See [I.M. 6.110, Attachment E](#) for links to the Claim for Reimbursement forms. See the section titled Estimates and Vouchers Drawer Documents.)

Also, for these projects, counties may take advantage of the Appia-Doc Express integration that allows for direct transmittal of documents from Appia to Doc Express and for the return of Doc Express transition statuses to Appia. However, the use of this integration is not required.

### **County Projects ON the Farm-to-Market System LET PRIOR TO JANUARY 2024**

For projects let prior to January 2024, pay vouchers for CPS projects (county projects on the Farm-to-Market system) are generated in Appia, placed in Doc Express, and then emailed to the Finance Bureau at [DOT.LocalSystems@iowadot.us](mailto:DOT.LocalSystems@iowadot.us). These projects will not follow the automated payment process and will not be transmitted directly to the Finance Bureau for processing.

### **County Projects ON the Farm-to-Market System LET JANUARY 2024 OR LATER**

For county FM projects let on or after January 2024, this section is not applicable.

1) Submitting Payments for Approval

Note: Remember to enter 3% retainage on your first payment!

Once all of the information is entered for a payment and has been double-checked, the payment needs to be “Submitted for Approval” and then “Approved”. To submit a payment for approval, click on the blue “Submit for Approval” button in the top, right corner. A pull-down menu will appear with two options: “Submit in Appia®” and “Submit to Doc Express®”. Either option is acceptable for the projects subject to this section. However, the following guidance in this section assumes the “Submit in Appia®” option was chosen. For guidance on “Submitting to Doc Express®”, see the [Submitting Payments for Approval](#) section under the [County FM Projects LET ON OR AFTER JANUARY 2024](#) section.

Projects / 08-C008-089 / Payments / Payment #1

08-C008-089 Under Construction

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

Submit For Approval - Actions - Reports -

Submit in Appia®

Submit to Doc Express®

OVERVIEW WORK PERFORMED ATTACHMENTS

### Payment Information

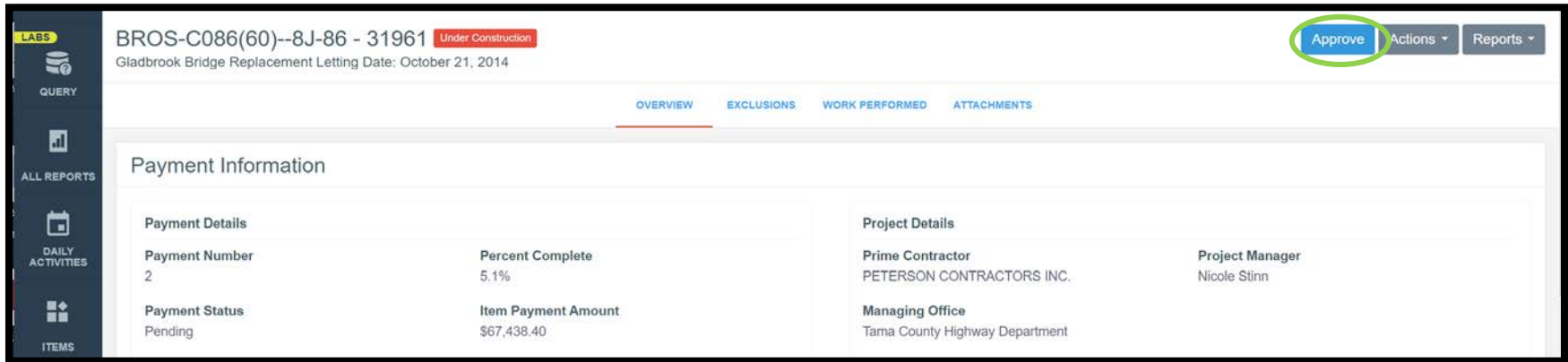
Edit

| Payment Details     |             | Project Details  |                        |
|---------------------|-------------|------------------|------------------------|
| Payment Number      | 1           | Prime Contractor | DIXON CONSTRUCTION CO. |
| Percent Complete    | 3.3%        |                  |                        |
| Payment Status      | Draft       |                  |                        |
| Item Payment Amount | \$17,303.50 |                  |                        |

| Pay Period |            |
|------------|------------|
| From Date  | 09/25/2023 |
| To Date    | 10/04/2023 |

| Retainage            |             |
|----------------------|-------------|
| Retainage Percent    | 3.000%      |
| Retainage Cap Amount | \$30,000.00 |

After the payment has been “Submitted for Approval” via “Submit in Appia”, an “Approve” button will appear for any person having a high enough role to do approvals. Click on the blue “Approve” button in the top, right corner to approve the payment.



### 2) [Uploading Payment to Doc Express for Signatures](#)

Using the [Naming Convention](#) to determine the appropriate drawer and file name, upload a PDF of the approved payment to Doc Express for signatures. See the [Generating a Payment Report \(Voucher\)](#) section for guidance on producing the appropriate PDF pay voucher.

### 3) [Making a Progress Payment](#)

#### **City Projects**

Once the pay voucher is signed in Doc Express, create a claim/invoice locally. Once the claim has been paid locally, submit a reimbursement request to the Administering Bureau using the appropriate Claim for Reimbursement form. (See [I.M. 6.110, Attachment E](#) for links to the Claim for Reimbursement forms.)

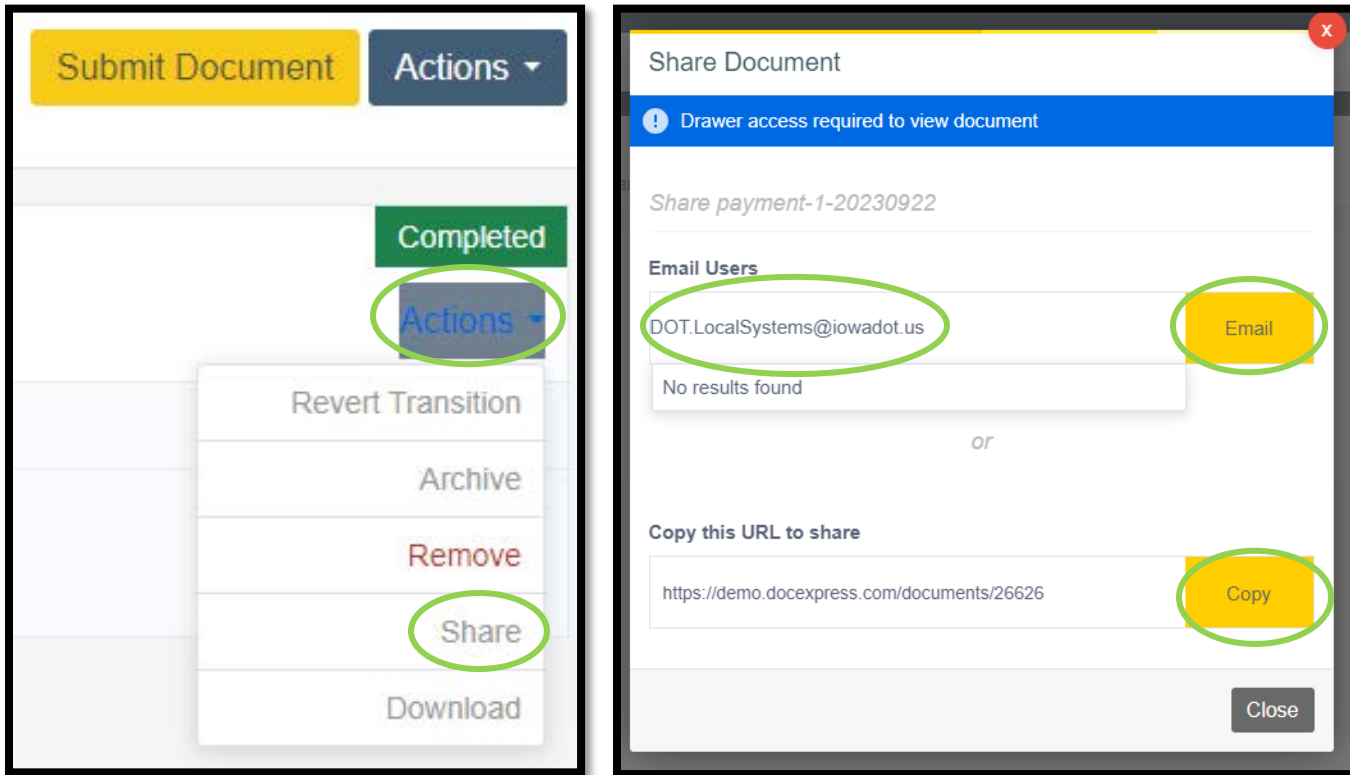
#### **County Projects NOT on the Farm-to-Market System**

Once the pay voucher is signed in Doc Express, create a claim/invoice locally. Once the claim has been paid locally, submit a reimbursement request to the Administering Bureau using the appropriate Claim for Reimbursement form. (See [I.M. 6.110, Attachment E](#) for links to the Claim for Reimbursement forms.)

**County Projects ON the Farm-to-Market System LET PRIOR TO JANUARY 2024**

Send the Doc Express signed pay voucher to the Finance Bureau at [DOT.LocalSystems@iowadot.us](mailto:DOT.LocalSystems@iowadot.us). Submittal can be done in one of two ways.

- Download the signed pay voucher from Doc Express, save it to your computer, and attach it in the email submittal.
- Include a link to the pay voucher in the email submittal.
  - To do this, in Doc Express, on the right side of the line containing the pay voucher, click on the “Actions” pull-down, and select “Share”. A pop-up box will appear, either type in the [DOT.LocalSystems@iowadot.us](mailto:DOT.LocalSystems@iowadot.us) email address into the top line and click “Email” OR click “Copy” on the second line and then paste the link into the submittal email.





#### 4) Making a Final Payment

When a local agency has completed the semi-final voucher, it is time to move forward with processing a final voucher.

Note: For county projects, a Board of Supervisors signature is required on the final voucher. If a signature line has not been created for the Board already, please create it prior to creating the final pay voucher. See either the Default Settings or Project Settings sections of the [Appia Project Creation & Account Management Instructions](#) for setting up signature lines on payment reports.

Two processes exist for generating a final payment voucher.

1. Standard Pay Voucher Process: See the [Standard Payment Voucher for Final Payment](#) subsection for guidance.
2. Appia's Final Payment Process: See the [Appia's Final Voucher \(Payment\) Process](#) subsection for guidance.
  - a. Appia's final voucher process includes the mandatory creation of a balancing change order. A balancing change order changes contract quantities to match paid quantities.

Please refer to the guidance below for the appropriate final payment option.

#### **City Projects**

May use either the Standard Pay Voucher Process or Appia's Final Payment Process (recommended)

#### **County Projects NOT on the Farm-to-Market System**

May use either the Standard Pay Voucher Process or Appia's Final Payment Process (recommended)

#### **County Projects ON the Farm-to-Market System LET PRIOR TO JANUARY 2024**

Use the Standard Pay Voucher Process only in order to avoid conflicts with the Contractor Pay System (CPS).

#### *a) Standard Payment Voucher for Final Payment*

Please see the [Standard Payment Voucher for Final Payment](#) section in the [Final Payment](#) section.

#### *b) Appia's Final Voucher (Payment) Process*

Please see the [Appia's Final Voucher \(Payment\) Process](#) section.

## H. Approving & Submitting an Automated Payment – FOR COUNTY FM PROJECTS LET ON OR AFTER JANUARY 2024 ONLY

### **City Projects**

City projects are reimbursement-style projects and are not applicable to this section. These projects do not get processed through the Contractor Pay System (CPS). Reimbursement-style projects will not follow the automated payment process and will not be transmitted directly to the Finance Bureau for processing. See section [Approving & Submitting a Payment – FOR CITY, COUNTY NON-FM, & COUNTY FM PROJECTS LET PRIOR TO JANUARY 2024](#) for guidance approving and submitting payments for cities.

### **County Projects NOT on the Farm-to-Market System**

County projects that are not on the Farm-to-Market system are reimbursement-style projects and are not applicable to this section. These projects do not get processed through the Contractor Pay System (CPS). Reimbursement-style projects will not follow the automated payment process and will not be transmitted directly to the Finance Bureau for processing. See section [Approving & Submitting a Payment – FOR CITY, COUNTY NON-FM, & COUNTY FM PROJECTS LET PRIOR TO JANUARY 2024](#) for guidance approving and submitting payments for cities.

### **County Projects ON the Farm-to-Market System LET PRIOR TO JANUARY 2024**

For county projects on the FM system let prior to January 2024, this section is not applicable.

### **County Projects ON the Farm-to-Market System LET JANUARY 2024 OR LATER**

For projects let on or after January 2024, pay vouchers for CPS projects (county projects on the Farm-to-Market system) follow the automated payment process. These payments are generated in Appia, submitted to Doc Express via Appia, signed in Doc Express, updated in Appia, and sent directly to the Finance Bureau from Appia for processing.

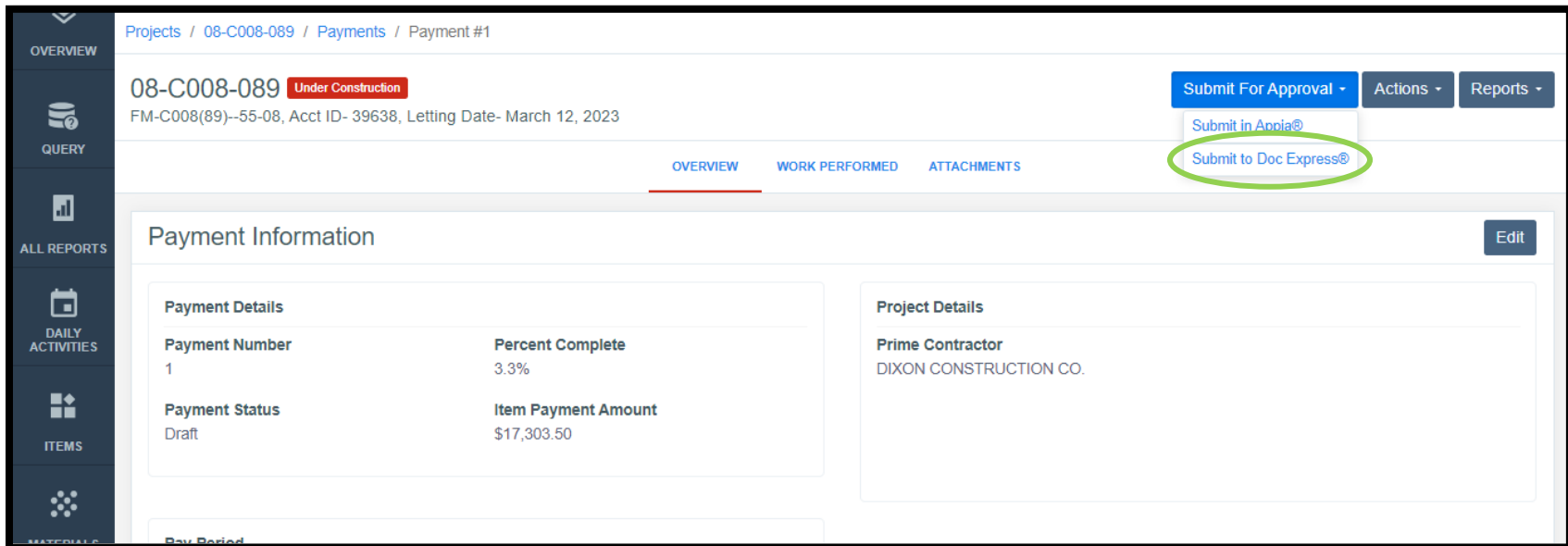
## 1) Submitting Payments for Approval

Note: Remember to enter 3% retainage on your first payment!

Note: In order to submit a payment for approval using the method described in this section, the Appia project must be integrated with the associated Doc Express Contract. If you have not enabled that integration yet, you will need to do so. Please see the [Integrating Appia with Doc Express for Submittals](#) section.

**Note:** For county FM projects let on or after January 2024, in order to make the automated process work, the “CPS Contractor Pay Finance” user must be added to the project, and the API Access for this user must be toggled “On”. If “CPS Contractor Pay Finance” is not currently a user in the project, or if that user’s API Access is not toggled “On” in the default/global user list, address those issues before proceeding. See the **Default Settings: Users – Adding/Deleting, Roles, Project Access, Licenses and the Project Settings** sections in the [Appia Project Creation & Account Management Instructions](#) for guidance on adding the “CPS Contractor Pay” user and on the API Access toggle.

Once all of the information is entered for a payment and has been double-checked, the payment needs to be “Submitted for Approval”. For these automated payment projects, “Approval” includes approvals in both Doc Express and Appia. To submit a payment for approval, click on the blue “Submit for Approval” button in the top, right corner. A pull-down menu will appear with two options: “Submit in Appia®” and “Submit to Doc Express®”. Click on the “Submit to Doc Express®” option.

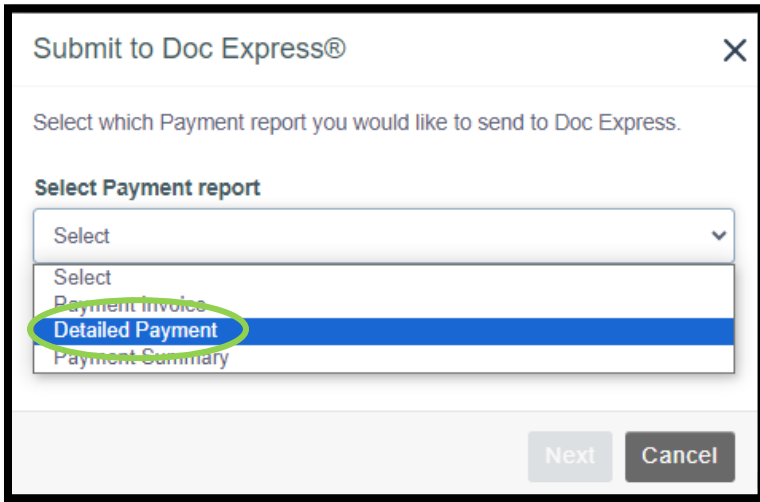


The screenshot displays the Appia software interface for a payment submission. The top navigation bar shows the breadcrumb: Projects / 08-C008-089 / Payments / Payment #1. The main header area includes the project ID 08-C008-089 with a red 'Under Construction' tag, and the text 'FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023'. On the right side, there are three buttons: 'Submit For Approval' (highlighted in blue), 'Actions', and 'Reports'. A dropdown menu is open under 'Submit For Approval', showing two options: 'Submit in Appia®' and 'Submit to Doc Express®'. The 'Submit to Doc Express®' option is circled in green. Below the header, there are three tabs: 'OVERVIEW' (selected), 'WORK PERFORMED', and 'ATTACHMENTS'. The main content area is titled 'Payment Information' and contains two panels: 'Payment Details' and 'Project Details'. The 'Payment Details' panel shows 'Payment Number 1' and 'Percent Complete 3.3%'. The 'Project Details' panel shows 'Prime Contractor DIXON CONSTRUCTION CO.'. There is also an 'Edit' button in the top right corner of the 'Payment Information' section.

| Payment Details     |             |
|---------------------|-------------|
| Payment Number      | 1           |
| Percent Complete    | 3.3%        |
| Payment Status      | Draft       |
| Item Payment Amount | \$17,303.50 |

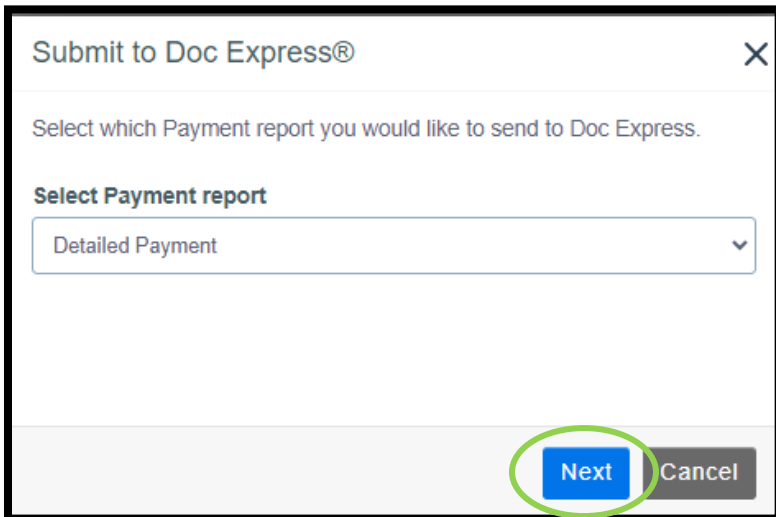
| Project Details  |                        |
|------------------|------------------------|
| Prime Contractor | DIXON CONSTRUCTION CO. |

A pop-up box will appear in which a payment report needs to be selected from the drop-down menu. Unless instructed otherwise by the Administering Bureau, always select the “Detailed Payment” report.



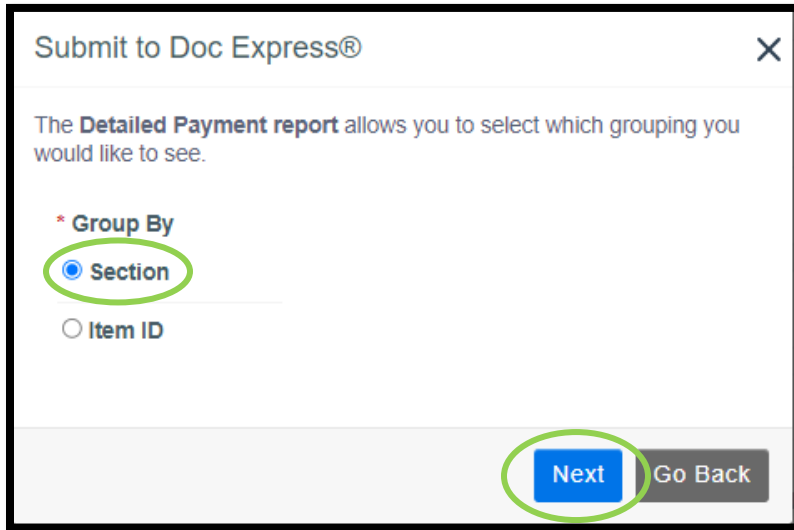
The screenshot shows a dialog box titled "Submit to Doc Express®" with a close button (X) in the top right corner. Below the title, there is a prompt: "Select which Payment report you would like to send to Doc Express." Underneath, the section "Select Payment report" contains a dropdown menu. The menu is open, showing four options: "Select", "Payment Invoice", "Detailed Payment", and "Payment Summary". The "Detailed Payment" option is highlighted with a blue background and is circled in green. At the bottom right of the dialog box, there are two buttons: "Next" (disabled) and "Cancel" (active).

When the appropriate report is showing in the “Select Payment report” line, click on the blue “Next” button in the lower, right corner of the box.



The screenshot shows the same "Submit to Doc Express®" dialog box. The dropdown menu now displays "Detailed Payment" as the selected option. The "Next" button at the bottom right is now highlighted with a blue background and is circled in green, indicating it should be clicked. The "Cancel" button remains disabled.

Another pop-up box will appear asking how the report should be grouped. Leave the Group By “Section” option selected. (This option keeps all of the bid items in order and groups them by project/division when a contract has more than one project/division.) Then, click the blue “Next” button in the lower, right corner of the box.



The image shows a dialog box titled "Submit to Doc Express®" with a close button (X) in the top right corner. The main text reads: "The **Detailed Payment report** allows you to select which grouping you would like to see." Below this, there is a section labeled "\* Group By" with two radio button options: "Section" (which is selected and circled in green) and "Item ID". At the bottom right of the dialog, there are two buttons: a blue "Next" button (circled in green) and a grey "Go Back" button.

A third pop-up box with pull-down menus will appear where you will select the appropriate Doc Express drawer and type for the document you are submitting. Please reference the Doc Express Naming Convention to determine the appropriate drawer and type for selection.

**Submit to Doc Express®** ✕

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

**Select a Doc Express® drawer for this payment**

Select ▼

**Select required type(s)**

No types

### Submit to Doc Express®

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

**Select a Doc Express® drawer for this payment**

Select

- Select
- Change Order
- Contract Documents
- Estimates and Vouchers**
- Project Closeout
- Weekly Reports

Submit Go Back

### Submit to Doc Express®

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

**Select a Doc Express® drawer for this payment**

Estimates and Vouchers

**Select required type(s)**

Select type(s)

- Project Costs (Form 240011)
- Pay Estimate
- Proof of Payment to Contractor
- Progress Voucher**
- Stockpiled Materials

Once the correct drawer and type have each been selected from the pull-down menus, click on the blue “Submit” button in the lower, right corner of the box.

### Submit to Doc Express® ✕

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

**Select a Doc Express® drawer for this payment**

Estimates and Vouchers ▾

**Select required type(s)**

× Progress Voucher

**Submit** **Go Back**



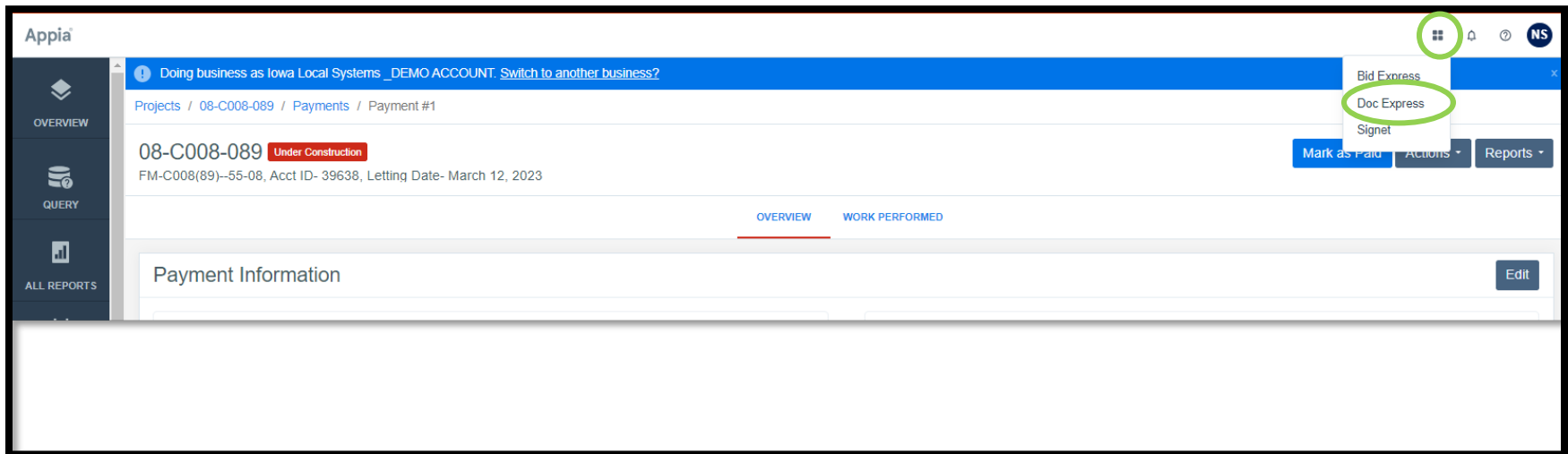
You will be returned to the Payment. A green ribbon should appear across the top of the screen saying, “The payment has been submitted for approval successfully.” and “The payment report has been sent to Doc Express® successfully.”. Additionally, the Doc Express® Information now shows for the payment, including the Document Name, Date Submitted to Doc Express, Doc Express Status, and Doc Express Type(s).

The screenshot displays a software interface with a green notification banner at the top stating: "The payment has been submitted for approval successfully. The payment report has been sent to Doc Express® successfully." Below this, a blue banner reads: "Doing business as Iowa Local Systems - DEMO ACCOUNT. Switch to another business?". The main content area shows the "Payment Information" for project "08-C008-089 Under Construction". It includes sections for "Payment Details", "Project Details", "Pay Period", and "Retainage". At the bottom, the "Doc Express® Information" section is highlighted with a green oval, showing the following data:

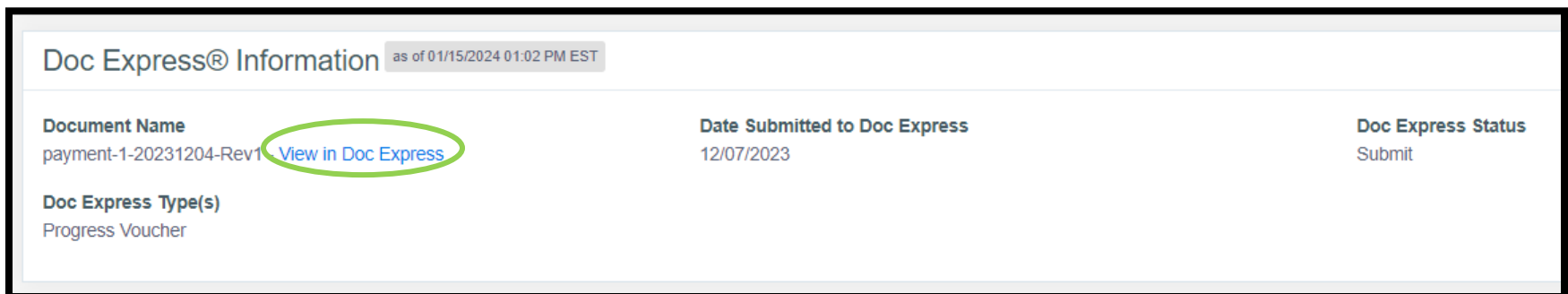
| Document Name                            | Date Submitted to Doc Express | Doc Express Status |
|--|-------------------------------|--------------------|
| payment-1-20231204 - View in Doc Express | 12/07/2023                    | Submit             |

Below the table, the "Doc Express Type(s)" is listed as "Progress Voucher".

At this point, the document needs to be signed and transitioned in Doc Express by the appropriate people (engineer, PIRC, etc.). Navigate to Doc Express to complete the transition and signature process. You can navigate to Doc Express by either opening a new browser tab and going to the Doc Express website, by clicking on the four-square box in the upper, right corner of the Appia screen and selecting Doc Express, or by clicking on the View Doc Express link found in the Doc Express Information section on the Payment overview screen in Appia.



Or



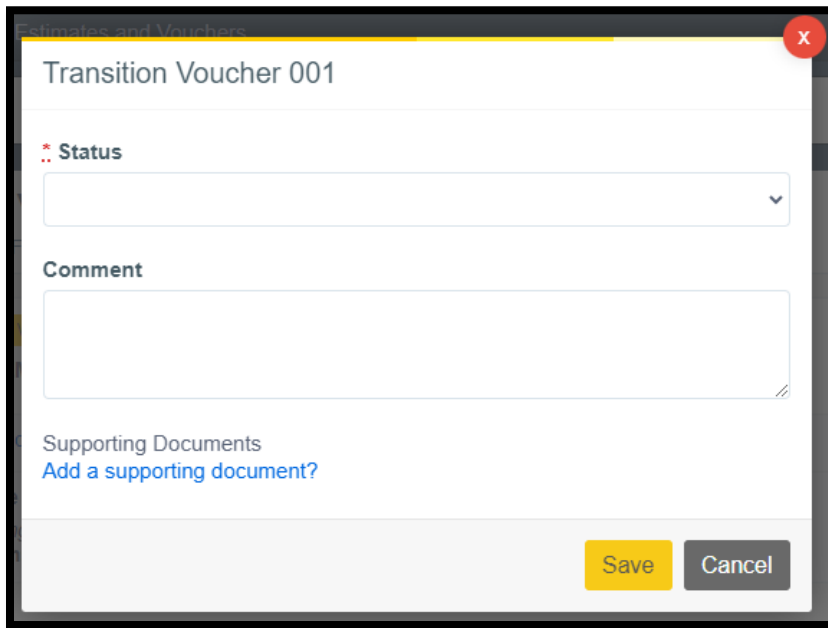
Once in Doc Express, select the appropriate contract and the appropriate drawer for the payment being submitted. The payment will show with a name similar to the one shown in the screenshot below. Do NOT update the name of the document.

The screenshot shows the 'Estimates and Vouchers' page for contract '08-C008-089 - Boone County | FM-C008(89)--55-08 | RCB Culvert Replacemen...'. The document title 'payment-1-20231204' is circled in green. The document is a 'Progress Voucher' and has an 'update' button. The account name is 'Iowa Local Systems \_DEMO ACCOUNT'. There are '0 comments' and '0 supporting documents'. The document was submitted on Dec 07, 2023, at 12:21 PM EST. The submitter is Nicole Stinn.

The appropriate person should now transition the pay voucher. To do so, click on the blue “Transition” text on the right end of the line containing the document.

This screenshot is identical to the one above, but the 'Transition' button next to the document title is circled in green, indicating the next step in the process.

A pop-up box will appear with a pull-down menu to choose the “Status” and a Comment field. Select the appropriate status from the pull-down menu. The use of the Comment field is optional.



Estimates and Vouchers

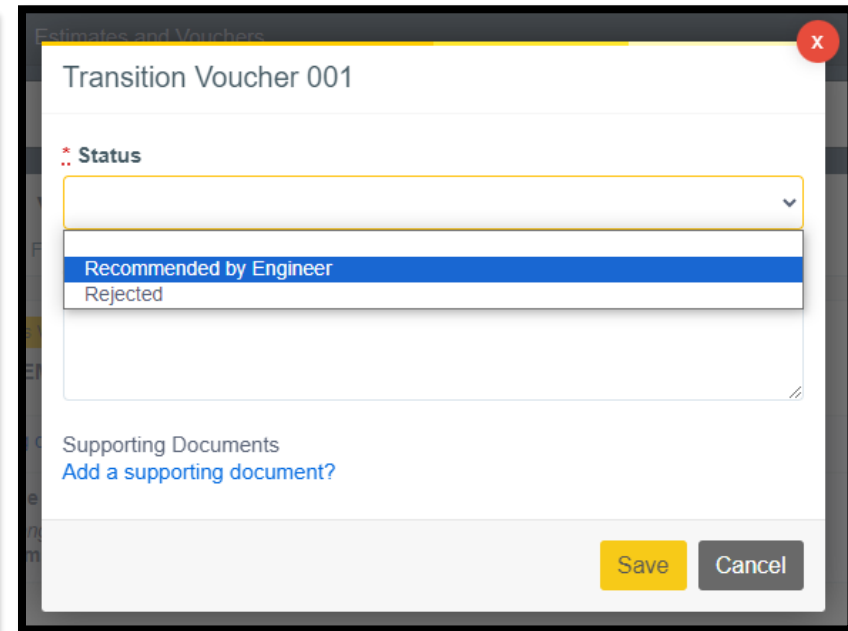
### Transition Voucher 001

\* Status

Comment

Supporting Documents  
[Add a supporting document?](#)

Save Cancel



Estimates and Vouchers

### Transition Voucher 001

\* Status

Recommended by Engineer  
Rejected

Comment

Supporting Documents  
[Add a supporting document?](#)

Save Cancel

If a Status is selected that requires a signature, a box will automatically appear that says, "Sign this document".

The screenshot shows a software window titled "Estimates and Vouchers" with a sub-header "Transition Voucher 001". The window contains a "Status" dropdown menu currently set to "Recommended by Engineer". Below this is a "Comment" text area. Further down, there is a section for "Supporting Documents" with a link "Add a supporting document?". A large, semi-transparent dialog box is overlaid on the bottom half of the window, containing the text "Sign this document" in a large font. Below this text is a checkbox with the text "By checking this box and entering my name above, I am electronically signing the attached document." At the bottom of the dialog box, there is another checkbox with the text "Transition document to final status of Completed?". To the right of this checkbox are two buttons: a yellow "Save" button and a grey "Cancel" button. A red "X" button is visible in the top right corner of the main window.

Sign the document by typing your name into the “Sign this document” box and check the box by the signature acknowledgment box. Signatures should ONLY be applied by the person with the authority to approve payments (the project engineer and/or the PIRC).

IF no additional signatures are needed in the workflow, check the box for “Transition document to final status of Completed?”. If additional signatures are needed, leave this box un-checked. Then click the yellow “Save” button in the lower, right corner of the box.

Check this box if no further signatures are required on the document. Otherwise, leave it un-checked.

The screenshot shows a web form titled "Transition Voucher 001". It includes a "Status" dropdown menu set to "Recommended by Engineer", a "Comment" text area, and a "Supporting Documents" section with a link to "Add a supporting document?". A signature box contains the name "Nicole Stinn". Below the signature box, there is a checked checkbox with the text "By checking this box and entering my name above, I am electronically signing the attached document." At the bottom, there is an unchecked checkbox labeled "Transition document to final status of Completed?". To the right of this checkbox are two buttons: a yellow "Save" button and a grey "Cancel" button. A red 'X' icon is in the top right corner of the form. Green annotations include a box pointing to the "Transition document to final status of Completed?" checkbox and circles around the signature name, the checked checkbox, and the "Save" button.

The new status should now show on the right end of the line containing the document. If this status is “Completed”, you are ready to return to the Payment in Appia. If not, transition the document until it reaches the “Completed” status.

**Payments will NOT transmit to the Finance Bureau unless the Doc Express status is “Completed”!**

Will not be sent to Finance!

The screenshot shows the 'Estimates and Vouchers' interface for document 08-C008-089. The voucher is 'Voucher 001' with a 'Progress Voucher' tag and an 'update' button. The status is 'Recommended by Engineer', which is circled in red. A red box with the text 'Will not be sent to Finance!' has a line pointing to this status. Other elements include 'Submit Document' and 'Actions' buttons, and a timestamp of 'Dec 01:04 PM EST'.

The screenshot shows the 'Estimates and Vouchers' interface for document 08-C008-089. The voucher is 'Voucher 001' with a 'Progress Voucher' tag. The status is 'Completed', which is circled in green. Other elements include 'Submit Document' and 'Actions' buttons, and a timestamp of 'Dec 01:07 PM EST'.

Once the document has been transitioned to a Completed status, navigate back to the Payment in Appia. The Doc Express Status shown should now say "Completed". If the status did not update, refresh the browser page.

The screenshot displays the Appia software interface for document 08-C008-089, which is currently in an "Under Construction" status. The interface includes a sidebar with navigation options such as "QUERY", "ALL REPORTS", "DAILY ACTIVITIES", "ITEMS", "MATERIALS", "STOCKPILES", "TIME LIMITS", "CHANGE ORDERS", "FORCE ACCOUNTS", and "PURCH LIST". The main content area is divided into two sections: "Payment Information" and "Doc Express® Information".

**Payment Information**

| Payment Details |                     |
|-----------------|---------------------|
| Payment Number  | Percent Complete    |
| 1               | 3.3%                |
| Payment Status  | Item Payment Amount |
| Pending         | \$17,303.50         |

| Project Details  |                        |
|------------------|------------------------|
| Prime Contractor | DIXON CONSTRUCTION CO. |

| Pay Period |            |
|------------|------------|
| From Date  | To Date    |
| 09/25/2023 | 10/04/2023 |

| Retainage          |                      |
|--------------------|----------------------|
| Retainage Percent  | Retainage Cap Amount |
| 3.000%             | \$30,000.00          |
| Retainage Released |                      |
| \$0.00             |                      |

**Doc Express® Information** as of 12/07/2023 01:11 PM EST

| Document Name                                     | Date Submitted to Doc Express | Doc Express Status |
|---|-------------------------------|--------------------|
| Voucher 001 - <a href="#">View in Doc Express</a> | 12/07/2023                    | Completed          |

**Doc Express Type(s)**  
Progress Voucher



Once the Doc Express status of “Completed” is showing in the payment and you are SURE the payment is ready to be submitted to the Finance Bureau for processing, click on the blue “Approve” button in the upper, right corner of the Payment screen.

**For contracts let in January 2024 or later, clicking “Approve” WILL send the payment to Finance. Do NOT email the payment report to the DOT.LocalSystems@iowadot.us email address also. Emailing the payment will cause confusion and errors. If you do not receive any communications to the contrary, YOUR PAYMENT WENT THROUGH SUCCESSFULLY.**

The screenshot displays a web interface for a payment screen. At the top, the project ID is 08-C008-089, with a red 'Under Construction' status tag. Below this, the text reads 'FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023'. In the top right corner, there are three buttons: 'Approve' (highlighted with a green circle), 'Actions', and 'Reports'. A navigation bar below the header includes 'OVERVIEW' (underlined), 'WORK PERFORMED', and 'ATTACHMENTS'. The main content area is titled 'Payment Information' and is divided into two columns: 'Payment Details' and 'Project Details'. The 'Payment Details' column contains a table with the following data:

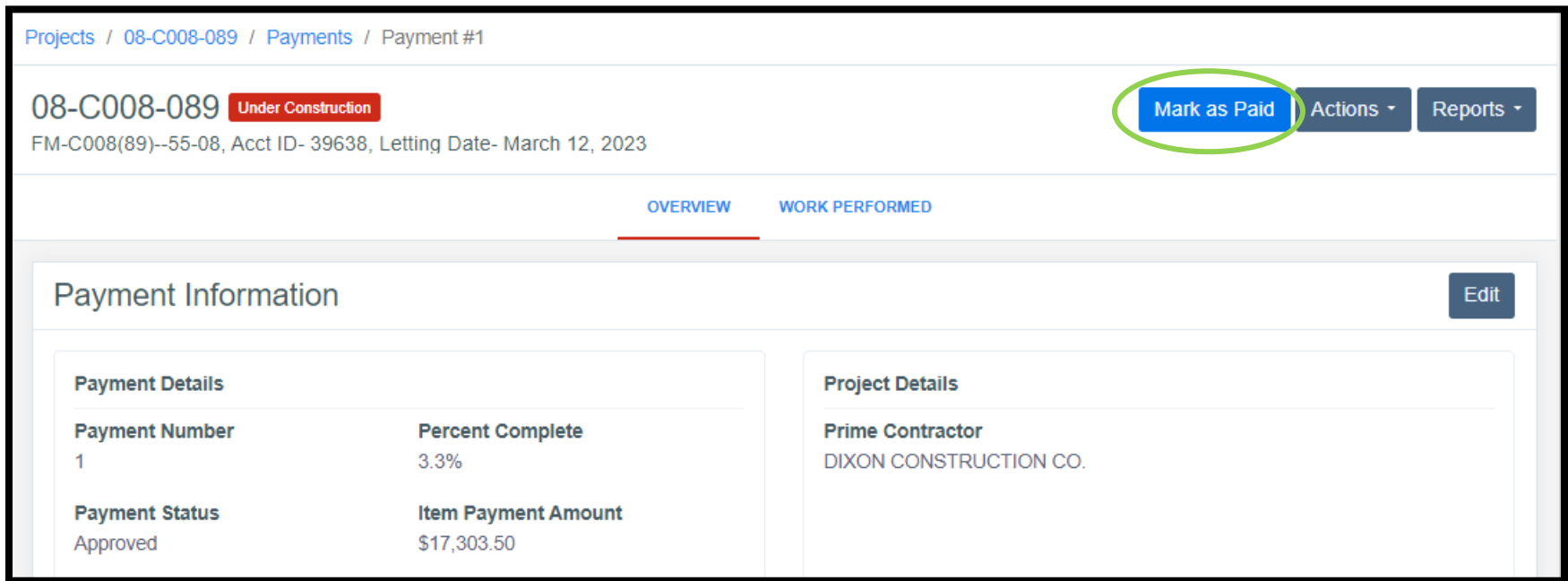
| Payment Number | Percent Complete    |
|----------------|---------------------|
| 1              | 3.3%                |
| Payment Status | Item Payment Amount |
| Pending        | \$17,303.50         |

The 'Project Details' column shows the 'Prime Contractor' as 'DIXON CONSTRUCTION CO.' A left-hand sidebar contains navigation options: 'QUERY', 'ALL REPORTS', 'DAILY ACTIVITIES', and 'ITEMS'.

Once the payment has been made a Proof of Payment document will be uploaded to Doc Express by the Local Systems Bureau. Once the Proof of Payment has been uploaded and the LPA has checked the Proof of Payment against their submitted Appia voucher, the payment can be Marked as “Paid” in Appia.

**Marking a payment as “Paid” is “undo-able”. It will lock down all approved reports/entries in Appia made prior to the “Paid” date. This includes change orders and daily reports. Marking a payment as “Paid” is recommended in order to avoid pay vouchers from being intentionally or unintentionally un-approved and changed after they have already been submitted to the Finance Bureau for processing. However, do NOT mark a payment as “Paid” until you are sure are prior entries are in order.**

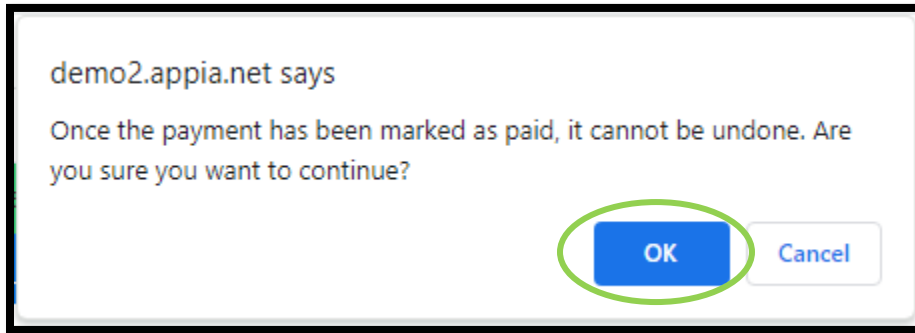
To mark a payment as “Paid”, click on the blue “Mark as Paid” button near the top, right corner of the Payment screen.



The screenshot shows the Appia interface for a payment. At the top, there is a breadcrumb trail: [Projects](#) / [08-C008-089](#) / [Payments](#) / [Payment #1](#). Below this, the project ID **08-C008-089** is displayed with a red **Under Construction** status tag. To the right, there are three buttons: **Mark as Paid** (highlighted with a green circle), **Actions** with a dropdown arrow, and **Reports** with a dropdown arrow. Below the buttons, the account information is shown: **FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023**. There are two tabs: **OVERVIEW** (selected) and **WORK PERFORMED**. The main content area is titled **Payment Information** and includes an **Edit** button. It is divided into two columns: **Payment Details** and **Project Details**.

| Payment Details       |                            | Project Details         |  |
|-----------------------|----------------------------|-------------------------|--|
| <b>Payment Number</b> | <b>Percent Complete</b>    | <b>Prime Contractor</b> |  |
| 1                     | 3.3%                       | DIXON CONSTRUCTION CO.  |  |
| <b>Payment Status</b> | <b>Item Payment Amount</b> |                         |  |
| Approved              | \$17,303.50                |                         |  |

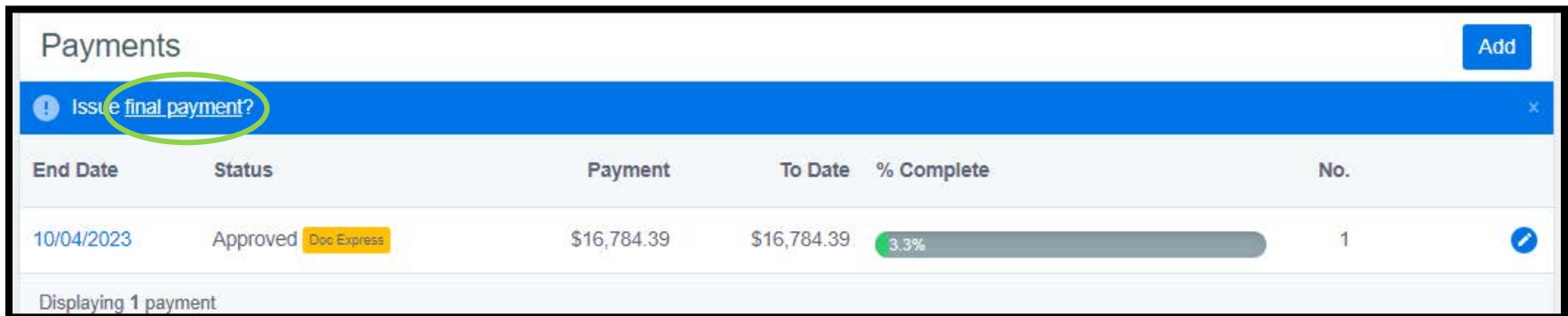
A pop-up box will appear near the top of the screen asking if you are sure you want to continue and that the action cannot be undone. Click the blue "OK" button if you want to proceed.



A green ribbon will appear at the top of the Payment screen saying, "The payment has been paid."

## 2) Making a Final Payment

When a local agency has completed the semi-final voucher, it is time to move forward with processing a final voucher, which includes any remaining adjustments to bid items and retainage release. For projects subject to this section, Appia's final payment process must be utilized. This process includes the creation of a balancing change order and requires marking items and time limits as "complete". See the [Appia's Final Voucher \(Payment\) Process](#) section for guidance on this process.



| End Date   | Status                            | Payment     | To Date     | % Complete | No. |
|------------|-----------------------------------|-------------|-------------|------------|-----|
| 10/04/2023 | Approved <span>Doc Express</span> | \$16,784.39 | \$16,784.39 | 3.3%       | 1   |

## I. [Early or Partial Retainage Release](#)

In the event a contractor requests an early/partial release of retained funds, a payment may be created for this purpose. Before completing any early/partial retainage release payments, refer to [I.M. 6.000, Attachment D](#) (section 2.28) and confirm with your [Local Systems Field Engineer](#) or Systems Planning Project Manager that a release is acceptable. Under no circumstances should a Local Public Agency release the full retainage until the project audit/review has been completed or waived by the Administering Bureau and the Administering Bureau has given the “ok” to release the retainage.

To create a payment with a partial retainage release, you will generate a standard voucher in the same manner you’ve generated progress vouchers throughout the rest of the project. (See each of the previous subsections in this [Payments](#) section for instructions on creating payment vouchers.) Early retainage release payments should only include the retainage release and should not include any item progress payments. Appia will automatically include any item postings in the date range specified for the pay voucher, so be sure to either run the payment for the retainage release in a week with no other item progress postings or keep the Daily Reports with the postings in draft status so they are not incorporated into the retainage release payment.

- To release retainage, simply enter the amount of retainage that needs to be released in the “Release” field. (The Retainage % should not need to be adjusted and can be left at the % used throughout the project.)
  - The value of retainage previously held on that contract can be found in the summary block on the last issued payment voucher or on the “Overview” screen for the project. (Click “Save” to see the summary block on the “Overview” screen if in editing mode.)
- Remarks: In the “Remarks” field, enter “Early/Partial Retainage Release”.
- From/To Dates: Double check that you are paying to the last date desired.
- Exclusions: Double check that any exclusions are appropriate before approving your pay voucher.

Click the blue “Save” button in the top, right corner and submit the voucher for approval as typical when all details have been entered. A “Detailed Payment” report can then be generated which will summarize the payment.

See screenshot on the next page.

ALL REPORTS
Edit Save Cancel

**Payment Details**

|                       |       |                            |        |
|-----------------------|-------|----------------------------|--------|
| <b>Payment Number</b> | 4     | <b>Percent Complete</b>    | 0.8%   |
| <b>Payment Status</b> | Draft | <b>Item Payment Amount</b> | \$0.00 |

**Project Details**

**Prime Contractor**  
NORRIS ASPHALT PAVING CO., LC

**Pay Period**

|                    |            |                  |            |
|--------------------|------------|------------------|------------|
| <b>* From Date</b> | 09/07/2023 | <b>* To Date</b> | 10/06/2023 |
|--------------------|------------|------------------|------------|

**Payment Dates**

|                      |  |                     |  |
|----------------------|--|---------------------|--|
| <b>Approval Date</b> |  | <b>Payment Date</b> |  |
|----------------------|--|---------------------|--|

**Retainage**

|                |             |   |             |
|----------------|-------------|---|-------------|
| <b>Retain</b>  | 3.000%      | <b>Retainage Cap Amount</b>               | \$30,000.00 |
| <b>Release</b> | \$31,981.20 | <a href="#">Edit Project Cap Settings</a> |             |

**Remarks**

14px B I U

Early/Partial Retainage Release

## J. [Final Payment](#)

When a local agency has completed the semi-final voucher, it is time to move forward with processing a final voucher.

**STOP: Do NOT make final payment and release retainage on a DOT-administered project unless the Administering Bureau has completed or waived their audit/review and has given the “ok” to make final payment.**

Two processes exist for generating a final payment voucher.

1. Standard Pay Voucher Process: See the [Standard Payment Voucher for Final Payment](#) subsection for guidance.
2. Appia’s Final Payment Process: See the [Appia’s Final Voucher \(Payment\) Process](#) subsection for guidance.
  - a. Appia’s final voucher process includes the mandatory creation of a balancing change order and requires marking items and time limits as “complete”. A balancing change order changes contract quantities to match paid quantities.

Please refer to the guidance below for the appropriate final payment option.

### **City Projects**

May use either the Standard Pay Voucher Process or Appia’s Final Payment Process (recommended)

### **County Projects NOT on the Farm-to-Market System**

May use either the Standard Pay Voucher Process or Appia’s Final Payment Process (recommended)

### **County Projects ON the Farm-to-Market System LET PRIOR TO JANUARY 2024**

Use the Standard Pay Voucher Process only in order to avoid conflicts with the Contractor Pay System (CPS).

### **County Projects ON the Farm-to-Market System LET ON OR AFTER JANUARY 2024**

Use Appia’s Final Payment Process only.

Projects / BROS-C086(60)--8J-86 - 31961 / Payments

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

Payments Add

Issue final payment?

| End Date   | Status   | Payment     | To Date     | % Complete | No. |
|------------|----------|-------------|-------------|------------|-----|
| 01/28/2019 | Approved | \$65,415.25 | \$72,753.30 | 0.1%       | 2   |
| 01/02/2019 | Approved | \$7,338.05  | \$7,338.05  | 0.5%       | 1   |

Displaying all 2 payments

infotech

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Refer to the paragraph directly above to determine if Appia's final payment process is appropriate for the project.

Note: For county projects on the FM system, a Board of Supervisors signature is required on the final voucher. If a signature line has not been created for the Board already, please create it prior to creating the final pay voucher. See either the Default Settings or Project Settings sections of the [Appia Project Creation & Account Management Instructions](#) for setting up signature lines on payment reports.

### 1) Standard Payment Voucher for Final Payment

To create a final payment voucher using the standard payment method, you will generate a standard voucher in the same manner you've generated progress vouchers throughout the rest of the project. (See each of the previous subsections in the [Payments](#) section for instructions on creating payment vouchers.)

The only difference between the final voucher and progress vouchers will be the remark entered and the value entered in the "Release" field.

- Retainage Release: For the retainage release, simply enter the amount of retainage that needs to be released in the "Release" field. Do not adjust the Retainage %. Leave it at the % used throughout the project.
  - The value of retainage previously held on that contract can be found in the summary block on the last issued payment voucher or on the "Overview" screen for the project. (Click "Save" to see the summary block on the "Overview" screen if in editing mode.)
- Remarks: In the "Remarks" field, enter "FINAL VOUCHER".
- From/To Dates: Double check that you are paying to the last date desired.
- Exclusions: Make sure there are no exclusions (or no desired exclusions) before approving your final voucher since this is the last voucher on which any payments will be made.

**STOP: Do NOT make final payment and release retainage on a DOT-administered project unless the Administering Bureau has completed or waived their audit/review and has given the "ok" to make final payment.**

If the Administering Bureau has completed or waived the project audit/review and has given the "ok" to make final payment, click the blue "Save" button in the top, right corner and submit the voucher for approval as typical when all details have been entered. A "Detailed Payment" report can then be generated which can be downloaded and then uploaded to Doc Express for inclusion with the final packet. Please see the [Doc Express Naming Convention](#) to determine the appropriate drawer and document name.

See screenshot on the next page.



ALL REPORTS
Edit
Save Cancel

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDERS

PUNCH LIST

\$  
PAYMENTS

|                         |                               |   |                                 |
|-------------------------|-------------------------------|---|---------------------------------|
| <b>Payment Details</b>  |                               | <b>Project Details</b>                            |                                 |
| Payment Number<br>3     | Percent Complete<br>5.1%      | Prime Contractor<br>PETERSON CONTRACTORS INC.     | Project Manager<br>Nicole Stinn |
| Payment Status<br>Draft | Item Payment Amount<br>\$0.00 | Managing Office<br>Tama County Highway Department |                                 |

|                           |                         |                      |              |
|---------------------------|-------------------------|----------------------|--------------|
| <b>Pay Period</b>         |                         | <b>Payment Dates</b> |              |
| * From Date<br>01/29/2019 | * To Date<br>01/31/2019 | Approval Date        | Payment Date |

|                  |                        |  |
|------------------|------------------------|--|
| <b>Retainage</b> |                        | <b>Retainage Cap Amount</b><br>\$30,000.00 |
| Retain<br>3.000% | Release<br>\$28,572.68 | <a href="#">Edit Project Cap Settings</a>  |

**Remarks**

14px **B** *I* U **≡** **≡** **≡** **≡** **≡** **A**

FINAL VOUCHER

AFTER the Administering Bureau has verified that the project is complete, the project audit is complete or waived, and the final payment generated above has been processed, then you may begin Appia’s final payment process in order to move a project to “Completed” status and remove it from the “Under Construction” status project list. See the [Appia's Final Voucher \(Payment\) Process](#) section for guidance on completing that process.

## 2) Appia's Final Voucher (Payment) Process

AFTER the Local Systems (or another DOT administering bureau) has verified that the project is complete and all necessary reviews and audits have been completed, you may begin Appia's final payment process. To begin the process, click on the "Issue final payment" link on the Payments screen.

Projects / 05-C005-074 / Payments

05-C005-074 Under Construction  
FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

Payments Add

[Issue final payment?](#)

| End Date   | Status                            | Payment        | To Date        | % Complete | No. |
|------------|-----------------------------------|----------------|----------------|------------|-----|
| 01/02/2024 | Approved <span>Doc Express</span> | \$18,306.25    | \$1,680,823.63 | 96.3%      | 3   |
| 12/31/2023 | Approved <span>Doc Express</span> | \$1,619,643.82 | \$1,662,517.38 | 95.3%      | 2   |
| 11/30/2023 | Approved <span>Doc Express</span> | \$42,873.56    | \$42,873.56    | 2.5%       | 1   |


Displaying all 3 payments






\*\*\*Note: Appia's final payment cannot be completed on the same day as a regular payment. Therefore, you must wait at least one day after approving a normal payment to issue Appia's final payment, or you can adjust your normal payment so that the "To Date" does not include the current day.

This screen should appear. First, click on the link to “Balance items”.

Balancing items will cause a “Balancing Change Order” to be automatically created for all items except items marked as “lump sum”. (This is partially why Local Systems asks you to remove lump sum “flags” from lump sum items in your reference data. See the [Appia Project Creation & Account Management Instructions](#) for removing lump sum “flags” from items.) A balancing change order changes the authorized quantities (original contract quantities or original quantities + change orders to date) to match the quantities that have been paid or are in an approved daily report.

Page County Test Under Construction  
Letting Date

  
Final Payment  
Final payment cannot be made until...

-  All items are balanced.  
Items must be balanced to ensure correct payment adjustments. [Balance items?](#)
-  All items are completed.  
Items must be completed to ensure correct payment adjustments. [Complete items?](#)
-  All punch list tasks are completed.  
Done.
-  All stockpiles are fully recovered.  
Done.
-  All time limits are completed.  
Time limits must be completed. [Complete time limits?](#)

[Create Final Payment](#)

Clicking on “Balance items” will bring up this screen. Check the “Items” box in the upper, left corner to select all items. Then, click the gray “Balance Items” button at the bottom or in the top, right corner.

05-C005-074 Under Construction  
FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

Items Save **Balance Items** Cancel

Items should be selected in order to balance items or to save as complete. Balancing items will create a new change order.

| Line Number   | Item ID | Unit         | Description  | Complete? |
|---|---------|--------------|--|-----------|
| <input checked="" type="checkbox"/> Section: 0001 - ROADWAY ITEMS |         |              |  |           |
| <input checked="" type="checkbox"/>                               | 0010    | 2102-2713070 | CY EXCAVATION, CLASS 13, ROADWAY AND BORROW  | No        |
| <input checked="" type="checkbox"/>                               | 0020    | 2109-8225100 | STA SPECIAL COMPACTION OF SUBGRADE   | No        |
| <input checked="" type="checkbox"/>                               | 0030    | 2113-0001100 | SY SUBGRADE STABILIZATION MATERIAL, POLYMER GRID   | No        |
| <input checked="" type="checkbox"/>                               | 0040    | 2115-0100000 | CY MODIFIED SUBBASE  | No        |
| <input checked="" type="checkbox"/>                               | 0050    | 2121-7425020 | TON GRANULAR SHOULDERS, TYPE B   | No        |
| <input checked="" type="checkbox"/>                               | 0060    | 2122-5500080 | SY PAVED SHOULDER, HOT MIX ASPHALT MIXTURE, 8 IN.  | No        |
| <input checked="" type="checkbox"/>                               | 0070    | 2210-0475105 | TON CHOKE STONE BASE   | No        |
| <input checked="" type="checkbox"/>                               | 0080    | 2217-1000000 | SY RUBBLIZED PAVEMENT  | No        |
| <input checked="" type="checkbox"/>                               | 0090    | 2301-1032080 | SY STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, CLASS C, CLASS 2 DURABILITY, 8 IN. | No        |

TIME LIMITS

|                                     |      |              |                                |    |
|-------------------------------------|------|--------------|--------------------------------|----|
| <input checked="" type="checkbox"/> | 0260 | 2527-9263180 | STA PAVEMENT MARKINGS REMOVED  | No |
| <input checked="" type="checkbox"/> | 0270 | 2528-2518000 | EACH SAFETY CLOSURE            | No |
| <input checked="" type="checkbox"/> | 0280 | 2528-8400256 | EACH TEMPORARY TRAFFIC SIGNALS | No |
| <input checked="" type="checkbox"/> | 0290 | 2528-8445110 | LS TRAFFIC CONTROL             | No |
| <input checked="" type="checkbox"/> | 0300 | 2533-4980005 | LS MOBILIZATION                | No |

Save **Balance Items**

A screen like this should appear with a green ribbon across the top saying, “The items have been updated successfully”. This is the newly created “balancing change order”. Review the items, and then click the blue “Submit for Approval” button in the upper, right corner. A drop-down menu will appear. Select “Submit to Doc Express”.

Projects / 05-C005-074 / Change Orders / Change Order #1

05-C005-074 Under Construction

FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

**Submit For Approval** Actions Reports

Submit in Appia®

Submit to Doc Express®

**Change Order** Edit

**Date Created**  
01/15/2024

**Status**  
Draft

**Summary**  
Balancing Change Order for Final Payment

**Description**  
Balancing Change Order for Final Payment

**Type**

**Total Proposed Amount**  
-\$65,556.57

**Quantity Changes** Edit

| Line Number                              | Item ID                       | Unit | Quantity Before | Quantity Change | Quantity After | Unit Price | Extension Change |
|--|-------------------------------|------|-----------------|-----------------|----------------|------------|------------------|
| Section: 0001 - ROADWAY ITEMS            |                               |      |                 |                 |                |            |                  |
| 0010                                     | 2102-2713070                  | CY   | 407.900         | -2.080          | 405.820        | \$18.000   | -\$37.44         |
| EXCAVATION, CLASS 13, ROADWAY AND BORROW |                               |      |                 |                 |                |            |                  |
| Reason: Balancing Change Order           |                               |      |                 |                 |                |            |                  |
|  | DIVISION 1 FM-C005(74)--55-05 |      | 407.900         | -2.080          | 405.820        | \$18.000   | -\$37.44         |
| 0020                                     | 2109-8225100                  | STA  | 7.600           | -0.600          | 7.000          | \$600.000  | -\$360.00        |
| SPECIAL COMPACTION OF SUBGRADE           |                               |      |                 |                 |                |            |                  |
| Reason: Balancing Change Order           |                               |      |                 |                 |                |            |                  |

Follow the instructions in the [Submitting Change Orders for Approval Using the Doc Express Integration](#) section for submitting a change order through Doc Express.

Note: At this point, if you were to your Change Orders tab you would see that a change order has been created. Click to edit the change order to get back into it.

The screenshot displays a software interface for managing change orders. On the left is a dark sidebar with navigation icons and labels: ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, and CHANGE ORDERS (highlighted with a green circle). The main area is titled 'Change Orders' and features a table with columns: Date, Status, Amount, Type, Summary, and No. A single entry is shown with the following details:

| Date       | Status | Amount       | Type | Summary                                  | No. |
|------------|--------|--------------|------|--|-----|
| 01/15/2024 | Draft  | -\$65,556.57 |      | Balancing Change Order for Final Payment | 1   |

Below the table, it states 'Displaying 1 change order'. An 'Add' button is located in the top right corner of the table area. The 'Draft' status and the summary text are circled in green. The 'CHANGE ORDERS' menu item in the sidebar is also circled in green.

After clicking “Submit for Approval”, an “Approve” button will show if you have an appropriate role type which can administer approvals. If the appropriate Doc Express transitions have been completed and the change order has a Doc Express status of “Completed”, click “Approve”.

05-C005-074 Under Construction  
 FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

**Change Order**

Date Created: 01/15/2024      Status: Pending  
 Summary: Balancing Change Order for Final Payment      Type:  
 Description: Balancing Change Order for Final Payment      Total Pending Amount: -\$65,556.57

**Doc Express® Information** as of 01/15/2024 04:08 PM EST

Document Name: change\_order-1-20240115 - [View in Doc Express](#)      Date Submitted to Doc Express: 01/15/2024      Doc Express Status: **Completed**  
 Doc Express Type(s): Change Order

**Quantity Changes**

| Line Number                   | Item ID      | Unit | Quantity Before | Quantity Change | Quantity After | Unit Price | Extension Change |
|-------------------------------|--------------|------|-----------------|-----------------|----------------|------------|------------------|
| Section: 0001 - ROADWAY ITEMS |              |      |                 |                 |                |            |                  |
| 0010                          | 2102-2713070 | CY   | 407.900         | -2.080          | 405.820        | \$18.000   | -\$37.44         |

\*\*Note: Any lump sum items are present in the contract which are still flagged as lump sum items will have to be “balanced” on a normal change order if the quantity placed does not equal the contract quantity. This must be done in order to issue a final payment.

Now, go back to the Payments tab, and again click on the link for “Issue final payment”.

The screenshot displays the 'Payments' section of a software interface. At the top, the project name 'BROS-C086(60)--8J-86 - 31961' is shown with a red 'Under Construction' tag. Below this, the text 'Gladbrook Bridge Replacement Letting Date: October 21, 2014' is visible. The main heading is 'Payments', with an 'Add' button to its right. A link labeled 'Issue final payment?' is circled in green. Below the heading is a table with the following data:

| End Date   | Status   | Payment     | To Date     | % Complete | No. |
|------------|----------|-------------|-------------|------------|-----|
| 01/28/2019 | Approved | \$65,415.25 | \$72,753.30 | 5.1%       | 2   |
| 01/02/2019 | Approved | \$7,338.05  | \$7,338.05  | 0.5%       | 1   |

At the bottom of the table area, it says 'Displaying all 2 payments'. The Infotech logo is in the bottom left corner, and the copyright notice 'Copyright © 2021, Infotech®. All rights reserved.' is in the bottom right corner.

If the Final Payment screen shows a green check mark by the “All items are balanced” line, continue with marking items as complete. If not, please reference the [Troubleshooting Common Final Payment Issues](#) section.



Completing the balancing change order in the manner described above should have taken care of the second step in Appia’s final voucher process, which is marking all items as “complete”.

The screenshot shows a software interface for a 'Final Payment' process. On the left is a dark sidebar with navigation icons for QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, and MATERIALS. The main content area has a header with '05-C005-074' and a red 'Under Construction' tag, followed by 'FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022'. Below the header is a large icon of a document with a dollar sign and the text 'Final Payment' and 'Final payment cannot be made until...'. To the right is a checklist with five items, each with a green checkmark and the word 'Done.' below it. The second item, 'All items are completed.', is circled in green. The fifth item, 'All time limits are completed.', has a red exclamation mark icon and a link 'Complete time limits?'. At the bottom right is a 'Create Final Payment' button.

05-C005-074 Under Construction  
FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

Final Payment  
Final payment cannot be made until...

- ✓ All items are balanced.  
Done.
- ✓ All items are completed.  
Done.
- ✓ All punch list tasks are completed.  
Done.
- ✓ All stockpiles are fully recovered.  
Done.
- ! All time limits are completed.  
Time limits must be completed. [Complete time limits?](#)

Create Final Payment

If the second item for all items being marked complete does not have a green check mark, click on the “Complete items” link and this screen will come up. Check the “Items” box in the upper, left corner to select all items. Then, click the blue “Save” button at the bottom or in the top, right corner.

25-C025-118 Under Construction  
FM-C025(118)--55-25: Acct ID 37059, Letting Date: August 18, 2020

Items

Items should be selected in order to balance items or to save as complete. Balancing items will create a new change order.

| Line Number   | Item ID      | Unit | Description  | Complete? |
|---|--------------|------|--|-----------|
| <input checked="" type="checkbox"/> Section: 0001 - Roadway Items |              |      |  |           |
| <input checked="" type="checkbox"/> 0010                          | 2121-7425020 | TON  | GRANULAR SHOULDERS, TYPE B                                 | No        |
| <input checked="" type="checkbox"/> 0020                          | 2210-0475105 | TON  | CHOKE STONE BASE   | No        |
| <input checked="" type="checkbox"/> 0030                          | 2210-0475290 | TON  | MACADAM STONE BASE   | No        |
| <input checked="" type="checkbox"/> 0040                          | 2213-2713300 | CY   | EXCAVATION, CLASS 13, FOR WIDENING                         | No        |
| <input checked="" type="checkbox"/> 0050                          | 2303-1031500 | TON  | HOT MIX ASPHALT STANDARD TRAFFIC, BASE COURSE, 1/2 IN. MIX | No        |
| <input checked="" type="checkbox"/> 0060                          | 2303-1258283 | TON  | ASPHALT BINDER, PG 58-28S, STANDARD TRAFFIC                | No        |
| <input checked="" type="checkbox"/> 0070                          | 2303-6911000 | LS   | HOT MIX ASPHALT PAVEMENT SAMPLES                           | No        |
| <input checked="" type="checkbox"/> 0080                          | 2502-8212034 | LF   | SUBDRAIN, LONGITUDINAL, (SHOULDER) 4 IN. DIA.              | No        |
| <input checked="" type="checkbox"/> 0090                          | 2502-8225010 | EACH | SUBDRAIN OUTLET, 500-10                                    | No        |
| <input checked="" type="checkbox"/> 0100                          | 2528-8445110 | LS   | TRAFFIC CONTROL  | No        |
| <input checked="" type="checkbox"/> 0110                          | 2528-8445113 | EACH | FLAGGERS   | No        |
| <input checked="" type="checkbox"/> 0120                          | 2533-4980005 | LS   | MOBILIZATION   | No        |

Continue completing any remaining steps in Appia's final payment process for punch lists and stockpiles. (Reminder: To get here, go to Payments and then click on the "Issue final payment" link.) Last, follow the "Complete time limits?" link to mark Time Limits as complete.

25-C025-118 Under Construction  
FM-C025(118)-55-25: Acct ID 37059, Letting Date: August 18, 2020

OVERVIEW  
LABS  
QUERY  
ALL REPORTS  
DAILY ACTIVITIES  
ITEMS  
MATERIALS

Final Payment  
Final payment cannot be made until...

- All items are balanced.  
Items must be balanced to ensure correct payment adjustments. [Balance items?](#)
- All items are completed.  
Done.
- All punch list tasks are completed.  
Done.
- All stockpiles are fully recovered.  
Done.
- All time limits are completed.  
Time limits must be completed. [Complete time limits?](#)

Create Final Payment

Clicking on the “Complete time limits?” link will bring you to the Time Limits section. Click on the blue text of the name of the appropriate time limit and then on the “Edit” button in the next screen to edit the time limits data.

05-C005-074 Under Construction  
FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

### Time Limits

| Time limit name  | Type         | Completed | Status      | Days remaining |
|--|--------------|-----------|-------------|----------------|
| <a href="#">Working Days, Late Start Date - 08/29/2022, Liquidated Damage Rate - 1,000</a> | Working Days | 0.0%      | Not Started | 35.0           |

Displaying 1 time limit

05-C005-074 Under Construction  
FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

### Time Limit

Primary

| Description  | Type         | Status      |
|--|--------------|-------------|
| Working Days, Late Start Date - 08/29/2022, Liquidated Damage Rate - 1,000 | Working Days | Not Started |

| Original Days Allowed | Liquidated Damages/Day | Authorized Days Allowed |
|-----------------------|------------------------|-------------------------|
| 35.0                  | \$0.00                 | 35.0                    |

[Edit](#) [Cancel](#)

In the editing screen, click on the “Work Completed” toggle to mark it as “Yes”. Then click the blue “Save” button in the top, right corner.

The screenshot shows the 'Edit' screen for 'Working Days'. On the left sidebar, the 'MATERIALS' section is highlighted, and the 'Work Completed?' toggle is circled in green. In the top right corner, the 'Save' button is also circled in green. The main content area includes a description, start date, days charged, and a calendar for April 2021. The calendar shows the 7th of April highlighted in red.

**Working Days**

**Description**  
Working Days, Late Start Date: 09/21/20, Liquidated Damages: \$1,000.00

**Start Date**  
09/11/2020

**Work Completed**  
09/14/2020

**Days Charged**  
1.5

**Liquidated Damages/Day**  
\$0.00

**Days Remaining**  
23.5

**Total Liquidated Damages**  
\$0.00

**Primary Deadline?**  
 YES

**Work Completed?**  
 YES

**Calendar (April 2021):**

| SUN | MON | TUE | WED | THU | FRI | SAT |
|-----|-----|-----|-----|-----|-----|-----|
|     |     |     |     | 1   | 2   | 3   |
| 4   | 5   | 6   | 7   | 8   | 9   | 10  |
| 11  | 12  | 13  | 14  | 15  | 16  | 17  |
| 18  | 19  | 20  | 21  | 22  | 23  | 24  |
| 25  | 26  | 27  | 28  | 29  | 30  |     |

Return to the final payment.

The screenshot shows the 'Payments' screen. A blue banner at the top contains the text 'Issue final payment?' which is circled in green. Below the banner is a table with columns for End Date, Status, Payment, To Date, % Complete, and No. The table lists three payment entries.

**Payments**

**Issue final payment?**

| End Date   | Status                            | Payment        | To Date        | % Complete | No. |
|------------|-----------------------------------|----------------|----------------|------------|-----|
| 01/02/2024 | Approved <span>Doc Express</span> | \$18,306.25    | \$1,680,823.63 | 100.0%     | 3   |
| 12/31/2023 | Approved <span>Doc Express</span> | \$1,619,643.82 | \$1,662,517.38 | 98.9%      | 2   |
| 11/30/2023 | Approved <span>Doc Express</span> | \$42,873.56    | \$42,873.56    | 2.6%       | 1   |

When all tasks in the “Issue final payments screen have been completed”, it will bring you to the payment screen, and a ribbon across the top will say, “The payment has been saved successfully.” Review the details in the payment and then click on the blue “Submit for Approval” button in the top, right corner, and choose the “Submit to Doc Express” option from the drop-down menu.

The screenshot displays a software interface for editing a final payment. The interface includes a navigation sidebar on the left with options like OVERVIEW, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, and TIME LIMITS. The main content area shows the payment details for project 05-C005-074, which is under construction. The payment number is 4, and the status is Draft. The payment amount is \$0.00. The interface also shows the project details, including the prime contractor HENNINGSEN CONSTRUCTION, INC. The payment dates section includes fields for approval and payment dates. The 'Submit For Approval' button and its dropdown menu are highlighted with green circles.

**Payment Details**

|                |       |                     |        |
|----------------|-------|---------------------|--------|
| Payment Number | 4     | Percent Complete    | 100.0% |
| Payment Status | Draft | Item Payment Amount | \$0.00 |

**Project Details**

Prime Contractor: HENNINGSEN CONSTRUCTION, INC.

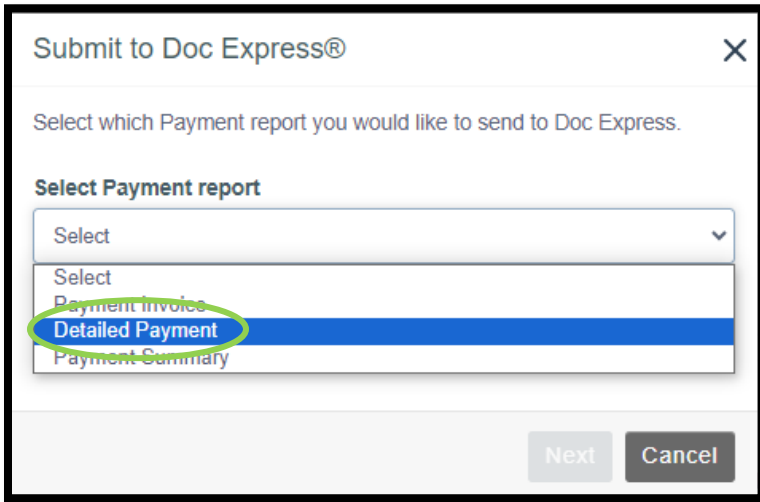
**Pay Period**

|             |            |           |            |
|-------------|------------|-----------|------------|
| * From Date | 01/03/2024 | * To Date | 01/15/2024 |
|-------------|------------|-----------|------------|

**Payment Dates**

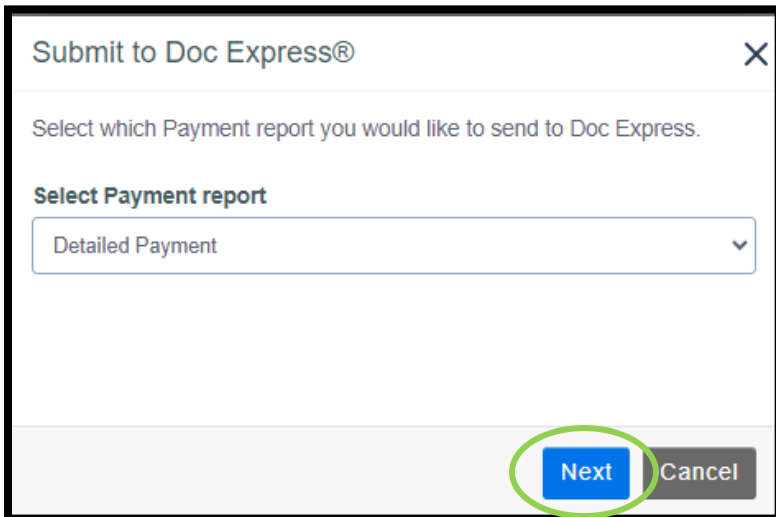
|               |  |              |  |
|---------------|--|--------------|--|
| Approval Date |  | Payment Date |  |
|---------------|--|--------------|--|

A pop-up box will appear in which a payment report needs to be selected from the drop-down menu. Unless instructed otherwise by the Administering Bureau, always select the “Detailed Payment” report.



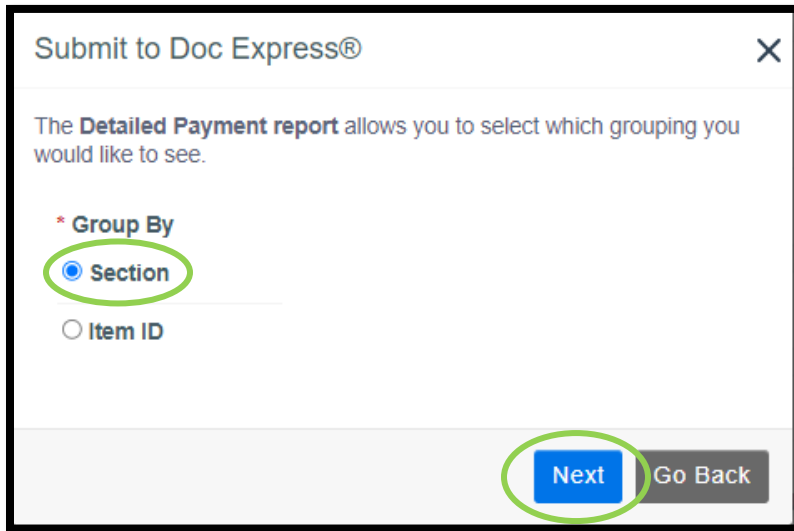
The screenshot shows a dialog box titled "Submit to Doc Express®" with a close button (X) in the top right corner. Below the title, there is a text prompt: "Select which Payment report you would like to send to Doc Express." Underneath, the section "Select Payment report" contains a dropdown menu. The menu is open, showing four options: "Select", "Payment Invoice", "Detailed Payment", and "Payment Summary". The "Detailed Payment" option is highlighted with a blue background and is circled in green. At the bottom right of the dialog box, there are two buttons: "Next" (disabled) and "Cancel" (active).

When the appropriate report is showing in the “Select Payment report” line, click on the blue “Next” button in the lower, right corner of the box.



The screenshot shows the same "Submit to Doc Express®" dialog box. The dropdown menu now displays "Detailed Payment" as the selected option. At the bottom right, the "Next" button is now highlighted in blue and circled in green, while the "Cancel" button remains grey.

Another pop-up box will appear asking how the report should be grouped. Leave the Group By “Section” option selected. (This option keeps all of the bid items in order and groups them by project/division when a contract has more than one project/division.) Then, click the blue “Next” button in the lower, right corner of the box.



Submit to Doc Express®

The **Detailed Payment report** allows you to select which grouping you would like to see.

\* Group By

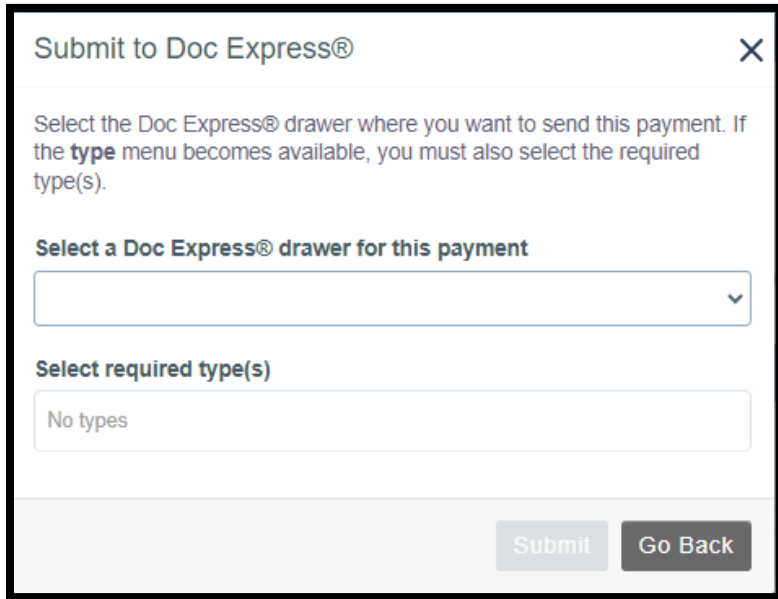
Section

Item ID

Next Go Back



A third pop-up box with pull-down menus will appear where you will select the appropriate Doc Express drawer and type for the document you are submitting. Please reference the Doc Express Naming Convention to determine the appropriate drawer and type for selection. (Note: The naming convention will show, for the Final Payment, the drawer should be the **Project Closeout** drawer, and the type should be **Final Voucher**.)



The screenshot shows a pop-up window titled "Submit to Doc Express®" with a close button (X) in the top right corner. The window contains the following text and controls:

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

**Select a Doc Express® drawer for this payment**

[Empty dropdown menu]

**Select required type(s)**

[Text box containing "No types"]

[Submit] [Go Back]

### Submit to Doc Express®

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

**Select a Doc Express® drawer for this payment**

Select  
Change Order  
Contract Documents  
Estimates and Vouchers  
**Project Closeout**

Submit Go Back

### Submit to Doc Express®

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

**Select a Doc Express® drawer for this payment**

Project Closeout

**Select required type(s)**

Select type(s)

Final Estimate  
Final Forms Checklist (6.110 Attachment F)  
Final Payment (Form 830436)  
**Final Voucher**  
Interest Payment Information (Form 830236)

Once the correct drawer and type have each been selected from the pull-down menus, click on the blue “Submit” button in the lower, right corner of the box.

Submit to Doc Express®

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this payment

Project Closeout

Select required type(s)

× Final Voucher

Submit Go Back

You will be returned to the Payment screen where a green ribbon will appear at the top saying, “The payment has been submitted for approval successfully. The payment report has been sent to Doc Express® successfully.”

For the remainder of the approval process in both Doc Express and Appia, follow the instructions in subsection [Submitting Payment for Approval](#) within section [Approving & Submitting and Automated Payment - FOR COUNTY FM PROJECTS LET ON OR AFTER JANUARY 2024 ONLY](#). Note, you will pick up mid-way through the [Submitting Payments for Approval](#) subsection after the instructions for submitting to Doc Express (similar to those shown in this section).

The Payments screen will now show Appia's Final Payment will a red "Final Payment" icon.

| End Date   | Status   | Payment        | To Date        | % Complete | No. |
|------------|--|----------------|----------------|------------|-----|
| 01/15/2024 | Approved <span>Doc Express</span> <span>Final Payment</span> | \$30,000.00    | \$1,710,823.63 | 100.0%     | 4   |
| 01/02/2024 | Approved <span>Doc Express</span>                            | \$18,306.25    | \$1,680,823.63 | 100.0%     | 3   |
| 12/31/2023 | Approved <span>Doc Express</span>                            | \$1,619,643.82 | \$1,662,517.38 | 98.9%      | 2   |
| 11/30/2023 | Approved <span>Doc Express</span>                            | \$42,873.56    | \$42,873.56    | 2.6%       | 1   |

Displaying all 4 payments

The last step is marking the voucher as "Paid". This action will move your project to the "Completed" status, so it will no longer be listed with the projects in the "Under Construction" status. Make sure everything is complete before performing this action. **THIS ACTION CANNOT BE UNDONE. Make sure the Administering Bureau has fully closed out the project before marking the final payment as "Paid".**

When ready, click on the blue circle icon with the pencil (shown above) to edit the payment information.

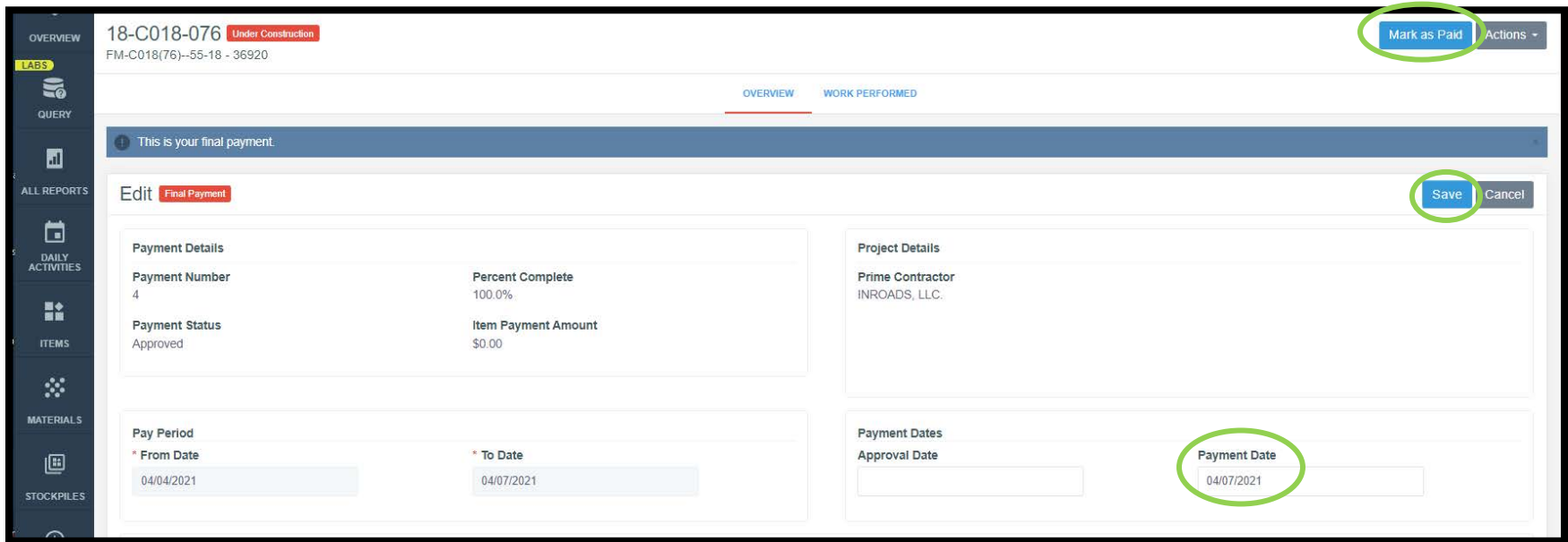
OVERVIEW 18-C018-076 Under Construction  
 LABS FM-C018(76)--55-18 - 36920  
 QUERY  
 ALL REPORTS  
 DAILY ACTIVITIES  
 ITEMS

### Payments

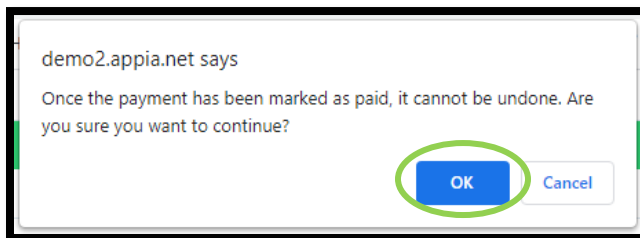
| End Date   | Status  | Payment     | To Date     | % Complete | No. |
|------------|---|-------------|-------------|------------|-----|
| 04/07/2021 | Approved <span style="color: red;">Final Payment</span> | \$1,308.87  | \$43,629.00 | 100.0%     | 4   |
| 04/03/2021 | Approved  | \$37,927.00 | \$42,320.13 | 100.0%     | 3   |
| 04/02/2021 | Approved  | \$4,365.00  | \$4,393.13  | 10.4%      | 2   |
| 02/01/2021 | Approved  | \$28.13     | \$28.13     | 0.1%       | 1   |

Displaying all 4 payments

In the payment overview screen, enter the “Payment Date”, and then click the blue “Save” button to the right. Last, click the blue “Mark as Paid” button in the top, right corner.



A pop-up box will appear saying, “Once the payment has been marked as paid, it cannot be undone. Are you sure you want to continue?”. Click “OK”.



Your project is automatically moved to “Completed” status and will be listed there now.

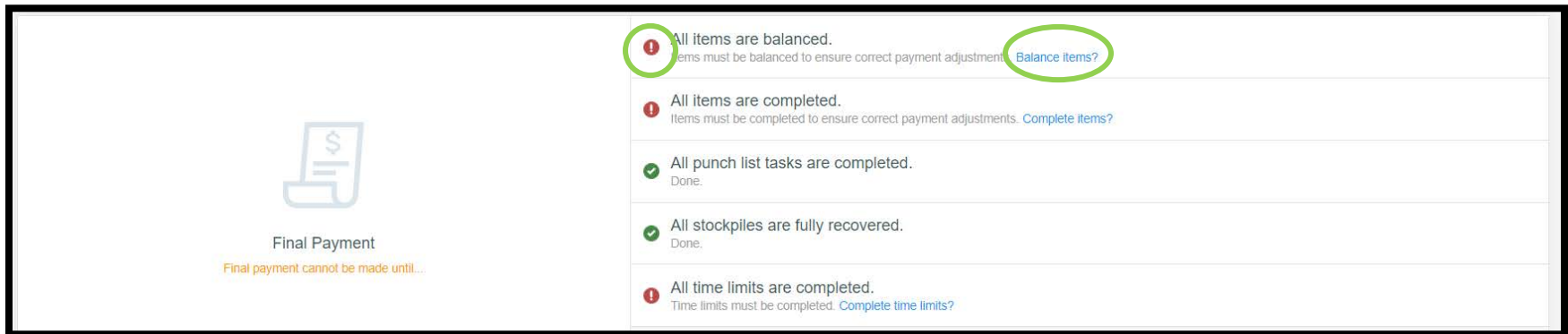
**Congratulations!!! You have successfully completed a project in Appia!**

### 3) Troubleshooting Common Final Payment Issues

#### Can't get items to show as "Balanced"

If the Final Payment screen is still showing that you need to balance items, it is likely because you had some items identified as true Lump Sum items that did not get fully paid. For these items, you will need to create a change order to bring the unit price of each of the Lump Sum items to \$0.00 (if the item was not used) or to the appropriate final price for the item. To create a change order, see the [Change Orders](#) section.

After creating a change order to zero out/adjust the unit price of the Lump Sum items, create an Item Posting in a Daily Report for 1.000 units of each item. Do this even if less than 1.000 units of the item were completed. The unit price set in the change order is the new total item price.

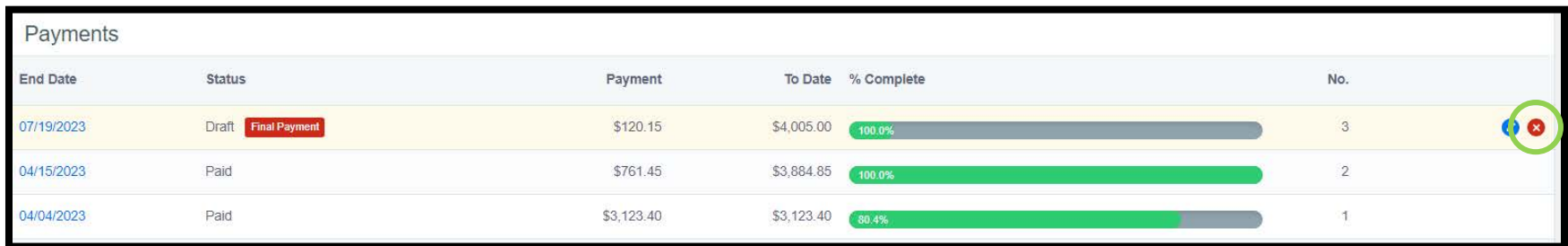


The screenshot shows the 'Final Payment' screen. On the left, there is a document icon with a dollar sign and the text 'Final Payment' and 'Final payment cannot be made until...'. On the right, there is a list of items with status indicators and links:

- All items are balanced. Items must be balanced to ensure correct payment adjustments. [Balance items?](#)
- All items are completed. Items must be completed to ensure correct payment adjustments. [Complete items?](#)
- All punch list tasks are completed. Done.
- All stockpiles are fully recovered. Done.
- All time limits are completed. Time limits must be completed. [Complete time limits?](#)

#### I have a Daily Report that has been excluded, and Appia won't let me issue final payment. However, it won't let me edit my Daily Report.

Go to the Payments screen. Delete the final payment by clicking on the red "x" at the right end of the line containing the payment. Now, you should be able to edit (approve or delete) the excluded Daily Report. After editing the Daily Report, re-do the Final Payment.

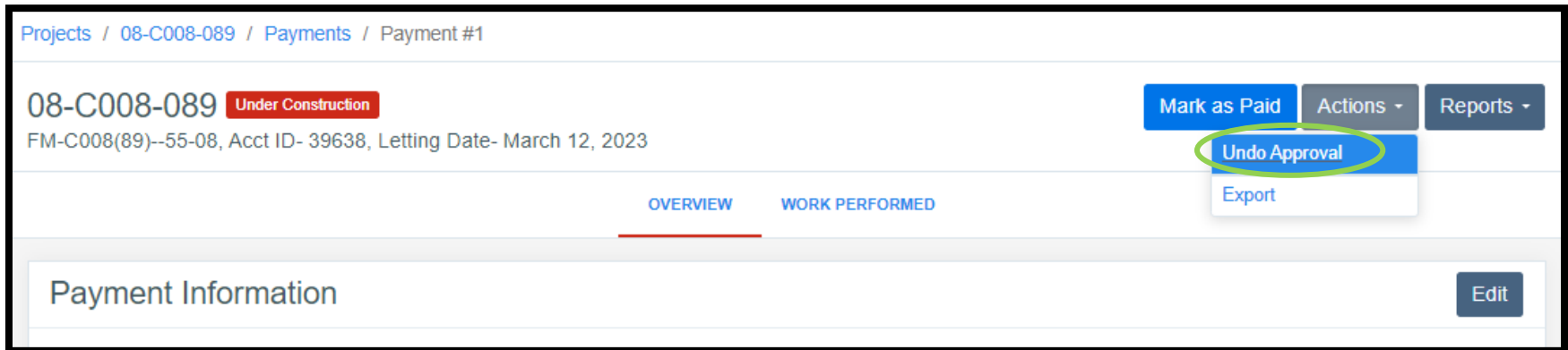


| End Date   | Status  | Payment    | To Date    | % Complete | No. |
|------------|---|------------|------------|------------|-----|
| 07/19/2023 | Draft <span style="background-color: red; color: white; padding: 2px;">Final Payment</span> | \$120.15   | \$4,005.00 | 100.0%     | 3   |
| 04/15/2023 | Paid  | \$761.45   | \$3,884.85 | 100.0%     | 2   |
| 04/04/2023 | Paid  | \$3,123.40 | \$3,123.40 | 80.4%      | 1   |

### K. Editing a Payment

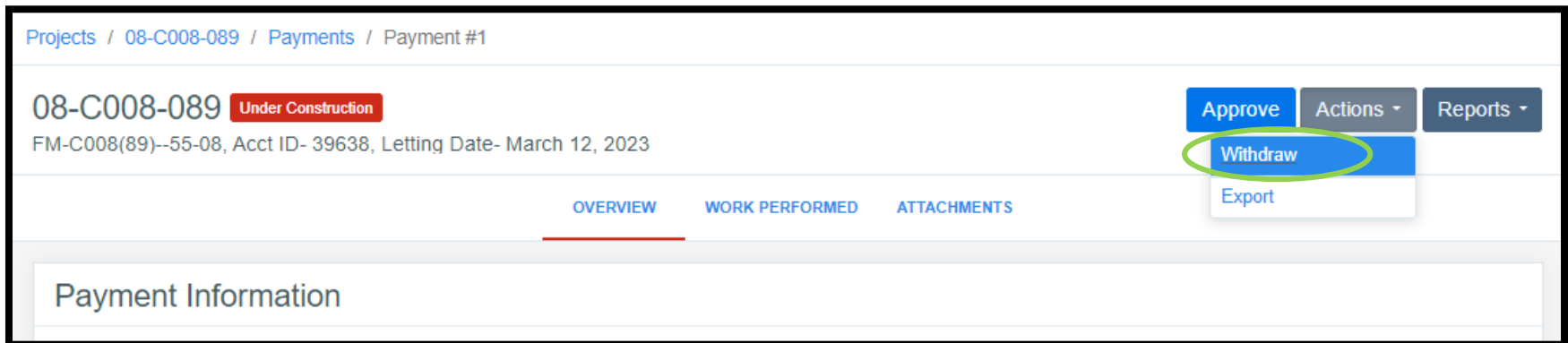
If you ever navigate away from the payments screen and need to get back in to edit a payment, simply go to the Payments tab on the left and then click on the blue circle with the pencil on the right side of the line containing the payment you want to edit. Payments can be edited until a payment date is entered. **Once a payment is marked as “Paid”, it cannot be un-approved or edited.**

Payments can be edited, even after they have been approved, **but they should not be edited after a payment has been made.** To edit an already-approved payment, first un-approve the payment by clicking on the “Actions” pull-down in the Payment and selecting “Undo Approval”.



The screenshot shows the 'Payment #1' page for project '08-C008-089' (Under Construction). The breadcrumb trail is 'Projects / 08-C008-089 / Payments / Payment #1'. The main header displays the project ID '08-C008-089' with a red 'Under Construction' tag, and the account details 'FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023'. On the right, there are buttons for 'Mark as Paid', 'Actions', and 'Reports'. The 'Actions' dropdown menu is open, showing 'Undo Approval' (circled in green) and 'Export'. Below the header are tabs for 'OVERVIEW' (selected) and 'WORK PERFORMED'. At the bottom, there is a 'Payment Information' section with an 'Edit' button.

Then, go to the “Actions” pull-down again, and select “Withdraw”.

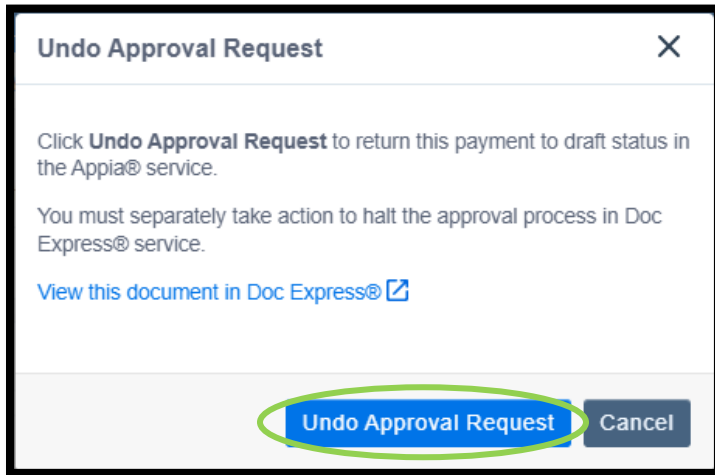


The screenshot shows the same 'Payment #1' page. The breadcrumb trail is 'Projects / 08-C008-089 / Payments / Payment #1'. The main header displays the project ID '08-C008-089' with a red 'Under Construction' tag, and the account details 'FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023'. On the right, there are buttons for 'Approve', 'Actions', and 'Reports'. The 'Actions' dropdown menu is open, showing 'Withdraw' (circled in green) and 'Export'. Below the header are tabs for 'OVERVIEW' (selected), 'WORK PERFORMED', and 'ATTACHMENTS'. At the bottom, there is a 'Payment Information' section.



If the payment was submitted for approval in Appia, the withdrawal action will take place as soon as you click on Withdraw.

If the payment has been submitted to Doc Express via Appia, a box will pop up telling you that you have to take separate action to halt the approval process in Doc Express. Click the blue “Undo Approval Request” button in the lower, right corner of the box.



Edit the payment as appropriate.

When the editing is finished, repeat the “Submit for Approval” step.

For projects using the “Submit to Doc Express” option, the revised document will be sent to Doc Express again. In Doc Express, the original document will still show, and the revised document will now appear having a “-Rev#” at the end of the file name.

The screenshot displays the 'Estimates and Vouchers' page for project '08-C008-089 - Boone County | FM-C008(89)--55-08 | RCB Culvert Replacemen...'. At the top right, there are buttons for 'Submit Document' and 'Actions'. The main content area lists two vouchers:

- payment-1-20231204-Rev1**: A yellow 'Progress Voucher' tag and a blue 'update' button are present. The voucher is for 'Iowa Local Systems \_DEMO ACCOUNT'. It has '0 comments' and '0 supporting documents'. A 'Submit' button is visible on the right. Below the voucher, a submission record is shown: 'Dec 07 2023 02:40 PM EST Submit Version 1 (current) Iowa Local Systems \_DEMO ACCOUNT - Nicole Stinn'.
- Voucher 001**: A yellow 'Progress Voucher' tag and a green 'Completed' tag are present. The voucher is for 'Iowa Local Systems \_DEMO ACCOUNT'. It has '0 comments' and '0 supporting documents'. An 'Actions' dropdown menu is visible on the right.

Transition it to “Complete”, and refresh the Payment in Appia to bring back in the updated status as advised in the [Submitting Payments for Approval](#) subsection under the [Approving & Submitting an Automated Payment - FOR COUNTY FM PROJECTS LET ON OR AFTER JANUARY 2024 ONLY](#) section.

Send a request to the Local Systems E-Construction administrator to delete the prior created incorrect voucher.

**County projects on the Farm-to-Market system let on or after the January 2024 letting are subject to the automated payment process. For these projects, do NOT un-approve a payment and edit it after the Wednesday at noon submittal deadline unless instructed to do so by Finance or Local Systems. Un-approving a payment that has already been automatically submitted for processing may result in errors or delay of payment processing.**

A payment can be deleted by clicking on the circle with the red "x" on the right side of the line.

OVERVIEW  
LABS  
QUERY  
ALL REPORTS  
DAILY ACTIVITIES

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

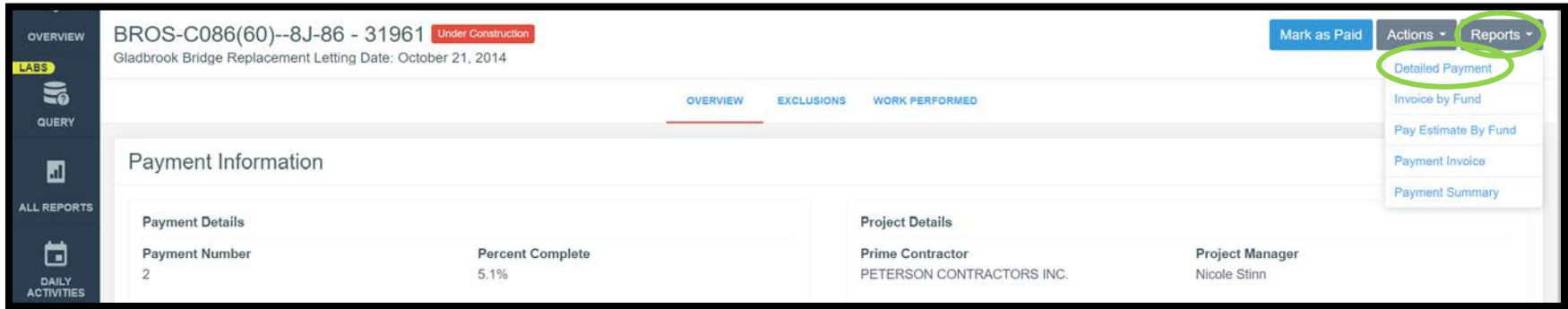
### Payments

| End Date   | Status   | Payment     | To Date     | % Complete | No. |
|------------|----------|-------------|-------------|------------|-----|
| 01/28/2019 | Draft    | \$65,415.25 | \$72,753.30 | 5.1%       | 2   |
| 01/02/2019 | Approved | \$7,338.05  | \$7,338.05  | 0.5%       | 1   |

Displaying all 2 payments

## L. Generating a Payment Report (Voucher)

Payment reports (vouchers) are NOT generated from the “All Reports” tab. Instead, they are generated from the “Payments” tab. To generate a payment report (voucher), click into the relevant payment and then click on the “Reports” pull-down in the top, right corner. LPAs can choose any of the reports they want for their own purposes, but the “Detailed Payment” report should be used for submittals to the Iowa DOT (reimbursement requests and CPS submittals) unless requested otherwise by the Finance Bureau or the Administering Office. Any voucher chosen can be downloaded and saved and then uploaded to Doc Express.



The screenshot shows the 'Payment Information' page for project BROS-C086(60)--8J-86 - 31961, which is 'Under Construction'. The page includes a sidebar with navigation options like 'OVERVIEW', 'LABS', 'QUERY', 'ALL REPORTS', and 'DAILY ACTIVITIES'. The main content area has tabs for 'OVERVIEW', 'EXCLUSIONS', and 'WORK PERFORMED'. The 'Payment Details' section shows 'Payment Number 2' and 'Percent Complete 5.1%'. The 'Project Details' section shows 'Prime Contractor PETERSON CONTRACTORS INC.' and 'Project Manager Nicole Stinn'. In the top right corner, there is a 'Mark as Paid' button and a 'Reports' dropdown menu. The 'Reports' menu is open, and the 'Detailed Payment' option is highlighted with a green circle.

Once the “Detailed Payment” report type is chosen from the drop-down menu, the following screen will appear. Select the “Section” radio button and then click the “Run Report” button in the top, right corner.



The screenshot shows the 'Detailed Payment' configuration screen for project 29-C029-086, which is 'Under Construction'. The page includes a breadcrumb trail: 'Projects / 29-C029-086 / Payments / Payment #1 / Detailed Payment'. The main content area shows the project name and details. In the 'Detailed Payment' section, there is a 'Group By' section with two radio buttons: 'Section' (selected and circled in green) and 'Item ID'. In the top right corner, there is a 'Run Report' button (circled in green) and a 'Cancel' button.

Additionally, a .csv payment report can be exported by choosing the “Actions” pull-down in the top, right corner and selecting “Export”.

The screenshot displays a software interface for project management. At the top, the project ID is BROS-C086(60)--8J-86 - 31961, with a status of 'Under Construction'. Below this, the project name 'Gladbrook Bridge Replacement' and a letting date of October 21, 2014, are shown. The interface includes a sidebar with navigation options like 'OVERVIEW', 'LABS', 'QUERY', 'ALL REPORTS', and 'DAILY ACTIVITIES'. The main content area is titled 'Payment Information' and contains two columns of data: 'Payment Details' and 'Project Details'. The 'Actions' menu is open in the top right corner, with 'Export' highlighted.

| Payment Details |                     | Project Details                |                 |
|-----------------|---------------------|--------------------------------|-----------------|
| Payment Number  | Percent Complete    | Prime Contractor               | Project Manager |
| 2               | 5.1%                | PETERSON CONTRACTORS INC.      | Nicole Stinn    |
| Payment Status  | Item Payment Amount | Managing Office                |                 |
| Approved        | \$67,438.40         | Tama County Highway Department |                 |

A few sample pages of the "Detailed Payment" report are shown here.



# Tama County Highway Department

## Detailed Payment

BROS-C086(60)--8J-86 - 31961

**Description** Gladbrook Bridge Replacement  
Letting Date: October 21, 2014

**Payment Number** 2

**Pay Period** 01/03/2019 to 01/28/2019

**Prime Contractor** PETERSON CONTRACTORS INC.  
104 BLACK HAWK  
REINBECK, IA

**Payment Status** Approved

**Awarded Project Amount** \$1,457,851.99

**Authorized Amount** \$1,457,851.99

| Line Number  | Item ID      | Unit | Unit Price | Authorized Quantity | Current Paid Quantity | Previous Paid Quantity | Total Quantity Paid To Date | Total Quantity Placed To Date | Current Payment Amount | Total Amount Paid To Date |
|--|--------------|------|------------|---------------------|-----------------------|------------------------|-----------------------------|-------------------------------|------------------------|---------------------------|
| <b>Section: 1 - ITEMS FOR A 244'-0 X 30'-0 PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE</b> |              |      |            |                     |                       |                        |                             |                               |                        |                           |
| 0010   | 2104-2710020 | CY   | \$4.500    | 5,700.000           | 1,066.667             | 0.000                  | 1,066.667                   | 1,066.667                     | \$4,800.00             | \$4,800.00                |
| EXCAVATION, CL 10, CHANNEL   |              |      |            |                     |                       |                        |                             |                               |                        |                           |

Detailed Payment:  
BROS-C086(60)--8J-86 - 31961

04/06/2021  
Page 1 of 9

| Line Number                                      | Item ID      | Unit | Unit Price   | Authorized Quantity | Current Paid Quantity | Previous Paid Quantity | Total Quantity Paid To Date | Total Quantity Placed To Date | Current Payment Amount | Total Amount Paid To Date |
|--|--------------|------|--------------|---------------------|-----------------------|------------------------|-----------------------------|-------------------------------|------------------------|---------------------------|
| 0120   | 2501-0201057 | LF   | \$33.350     | 1,260.000           | 0.000                 | 0.000                  | 0.000                       | 0.000                         | \$0.00                 | \$0.00                    |
| PILES, STEEL, HP 10 X 57                         |              |      |              |                     |                       |                        |                             |                               |                        |                           |
| 0130   | 2501-0201473 | LF   | \$39.480     | 1,540.000           | 770.000               | 0.000                  | 770.000                     | 770.000                       | \$30,399.60            | \$30,399.60               |
| PILES, STEEL, HP 14 X 73                         |              |      |              |                     |                       |                        |                             |                               |                        |                           |
| 0140   | 2501-5478073 | LF   | \$76.100     | 396.000             | 408.000               | 0.000                  | 408.000                     | 408.000                       | \$31,048.80            | \$31,048.80               |
| CONCRETE ENCASEMENT OF STEEL H PILES, HP 14 X 73 |              |      |              |                     |                       |                        |                             |                               |                        |                           |
| 0150   | 2501-6335010 | LF   | \$38.620     | 180.000             | 0.000                 | 0.000                  | 0.000                       | 0.000                         | \$0.00                 | \$0.00                    |
| PREBORED HOLE                                    |              |      |              |                     |                       |                        |                             |                               |                        |                           |
| 0160   | 2507-2638650 | SY   | \$109.700    | 27.000              | 0.000                 | 0.000                  | 0.000                       | 0.000                         | \$0.00                 | \$0.00                    |
| BRIDGE WING ARMORING - EROSION STONE             |              |      |              |                     |                       |                        |                             |                               |                        |                           |
| 0170   | 2507-3250005 | SY   | \$2.500      | 2,805.000           | 0.000                 | 0.000                  | 0.000                       | 0.000                         | \$0.00                 | \$0.00                    |
| ENGINEERING FABRIC                               |              |      |              |                     |                       |                        |                             |                               |                        |                           |
| 0180   | 2507-6800061 | TON  | \$33.000     | 2,180.000           | 0.000                 | 0.000                  | 0.000                       | 0.000                         | \$0.00                 | \$0.00                    |
| REVTMENT, CLASS E                                |              |      |              |                     |                       |                        |                             |                               |                        |                           |
| 0190   | 2533-4980005 | LS   | \$82,187.500 | 1.000               | 0.000                 | 0.000                  | 0.000                       | 0.000                         | \$0.00                 | \$0.00                    |
| MOBILIZATION                                     |              |      |              |                     |                       |                        |                             |                               |                        |                           |
| 0200   | 2536-6745045 | LS   | \$6,300.000  | 1.000               | 0.000                 | 0.000                  | 0.000                       | 0.000                         | \$0.00                 | \$0.00                    |
| RMVL OF ASBESTOS                                 |              |      |              |                     |                       |                        |                             |                               |                        |                           |
| <b>Section Totals:</b>                           |              |      |              |                     |                       |                        |                             |                               | \$66,248.40            | \$66,248.40               |
| <b>Section: 2 - ROADWAY ITEMS</b>                |              |      |              |                     |                       |                        |                             |                               |                        |                           |

Detailed Payment:  
BROS-C086(60)--8J-86 - 31961

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Page 3 of 9

| Line Number            | Item ID | Unit | Unit Price | Authorized Quantity | Current Paid Quantity | Previous Paid Quantity | Total Quantity Paid To Date | Total Quantity Placed To Date | Current Payment Amount | Total Amount Paid To Date |
|------------------------|---------|------|------------|---------------------|-----------------------|------------------------|-----------------------------|-------------------------------|------------------------|---------------------------|
| <b>Total Payments:</b> |         |      |            |                     |                       |                        |                             |                               | \$67,438.40            | \$75,003.40               |

### Time Charges

| Time Limit                | Original Deadline | Authorized Deadline | Charges This Period | Damages This Period | Days Completed To Date | Days Remaining To Date | Damages To Date |
|---------------------------|-------------------|---------------------|---------------------|---------------------|------------------------|------------------------|-----------------|
| Late Start Date: 04/16/15 | 120.0 Days        | 120.0 Days          | 0.0 Days            | \$0.00              | 0.0 Days               | 120.0 Days             | \$0.00          |
| <b>Total Damages:</b>     |                   |                     |                     |                     |                        |                        | \$0.00          |

### Summary

|                                       |             |                                       |             |
|---------------------------------------|-------------|---------------------------------------|-------------|
| <b>Current Approved Work:</b>         | \$67,438.40 | <b>Approved Work To Date:</b>         | \$75,003.40 |
| <b>Current Stockpile Advancement:</b> | \$0.00      | <b>Stockpile Advancement To Date:</b> | \$0.00      |
| <b>Current Stockpile Recovery:</b>    | \$0.00      | <b>Stockpile Recovery To Date:</b>    | \$0.00      |
| <b>Current Retainage:</b>             | \$2,023.15  | <b>Retainage To Date:</b>             | \$2,250.10  |
| <b>Current Retainage Released:</b>    | \$0.00      | <b>Retainage Released To Date:</b>    | \$0.00      |
| <b>Current Liquidated Damages:</b>    | \$0.00      | <b>Liquidated Damages To Date:</b>    | \$0.00      |
| <b>Current Adjustment:</b>            | \$0.00      | <b>Adjustments To Date:</b>           | \$0.00      |
| <b>Current Payment:</b>               | \$65,415.25 | <b>Payments To Date:</b>              | \$72,753.30 |
| <b>Previous Payment:</b>              | \$7,338.05  | <b>Previous Payments To Date:</b>     | \$7,338.05  |

Detailed Payment:  
BROS-C086(60)-8J-86 - 31961

04/06/2021  
Page 8 of 9

Note: A "Stockpiles" section will be shown on this final page as well if any stockpile entries have been made.



# 13 - Contractors

(Reserved for Contractors instructions)

This section is reserved for future instructions on the Contractors tab.

# 14 - Funding

To access the Funding details click on the "Funding" tab in the left menu.

The screenshot shows a software interface with a dark blue sidebar on the left containing navigation options: TIME LIMITS, CHANGE ORDERS, PUNCH LIST, PAYMENTS, CONTRACTORS, FUNDING (highlighted with a red circle), PHOTOS, and MORE. The main content area is divided into several sections:

- Project Information:**
  - Prime Contractor: CEDAR VALLEY CORP., LLC.
  - Project Manager: Niki Stinn
  - Managing Office: Local Systems
  - Created By: Douglas Heeren
- Funding Summary:**
  - Amount paid so far: \$0.00
  - 0% of your Awarded: \$4,553,445.96
  - 0% of your Authorized: \$4,580,158.96
- Important Dates:**
  - Date Created: Dec 5, 2022
  - Notice to Proceed: Dec 20, 2022
- Progress:**
  - Time Complete: 0 Days | Time Remaining: 82 Days
  - Amount Posted: \$300.00 | Awarded Amount: \$4,553,445.96
  - Amount Posted: \$300.00 | Authorized Amount: \$4,580,158.96
- Retainage:**
  - Total Retainage: \$0.00
  - Retainage Released: \$0.00

Clicking on Funding in the left menu will bring you to the Funding screen. Existing funding packages, sources, and associated amounts will be displayed. These amounts should match the funding sources shown on the Final Highway Funding sources document in Doc Express. LPAs do not generally need to be concerned with exactly what the funding codes mean as long as the values and proportions look generally correct. However, if the LPA does want/need to know about the exact funding source codes, please reach out to the Secondary Roads Engineer (counties) or the Urban Engineer (cities) in the [Local Systems Bureau](#).

Note: County FM funding will always be a CO##F or CO##F# code. Local county funding will be CO##L, and local city funding will be M####. With the ## or #### being the county or city number, respectively.

21-C021-153 Under Construction

STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

[Edit](#)

### Funding

| Fund Source | Fund Package                                    |          |                               |          |                            |          |
|-------------|---|----------|-------------------------------|----------|----------------------------|----------|
|             | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 |          | 001 CLAY CO LOCAL 21-C021-153 |          | 001 CLAY CO FM 21-C021-154 |          |
| CO21F       | \$0.00  | 0.000%   | \$0.00                        | 0.000%   | \$1,783,790.04             | 100.000% |
| Y238        | \$2,786,468.92                                  | 100.000% | \$0.00                        | 0.000%   | \$0.00                     | 0.000%   |
| CO21F1      | \$0.00  | 0.000%   | \$0.00                        | 0.000%   | \$0.00                     | 0.000%   |
| CO21L       | \$0.00  | 0.000%   | \$9,900.00                    | 100.000% | \$0.00                     | 0.000%   |

### Items

| Line Number   | Item ID      | Quantity  | Unit | Unit Price | Extension    |
|---|--------------|-----------|------|------------|--------------|
| Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS |              |           |      |            |              |
| 0010  | 2110-3825010 | 760.000   | TON  | \$7.900    | \$6,004.00   |
| GRANULAR MATERIAL   |              |           |      |            |              |
| 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153: 760.000              |              |           |      |            |              |
| 0020  | 2121-7425020 | 9,550.000 | TON  | \$32.760   | \$312,858.00 |

Show funding in dollars?  NO

To add a new funding package or edit an existing package, click on the blue “Edit” button in the top, right corner.

**21-C021-153** Under Construction  
 STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

**Funding** Edit

| Fund Source | Fund Package                                    |  |
|-------------|---|--|
|             | 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 | 001 CLAY CO LOCAL 21-C021-153 001 CLAY CO FM 21-C021-154 |
| CO21F       | \$0.00 0.000%                                   | \$0.00 0.000% \$1,783,790.04 100.000%                    |
| Y238        | \$2,786,468.92 100.000%                         | \$0.00 0.000% \$0.00 0.000%                              |
| CO21F1      | \$0.00 0.000%                                   | \$0.00 0.000% \$0.00 0.000%                              |
| CO21L       | \$0.00 0.000%                                   | \$9,900.00 100.000% \$0.00 0.000%                        |

**Items**

| Line Number  | Item ID      | Quantity  | Unit | Unit Price | Extension    |
|--|--------------|-----------|------|------------|--------------|
| <b>Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS</b> |              |           |      |            |              |
| 0010   | 2110-3825010 | 760.000   | TON  | \$7.900    | \$6,004.00   |
| GRANULAR MATERIAL  |              |           |      |            |              |
| 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153: 760.000                     |              |           |      |            |              |
| 0020   | 2121-7425020 | 9,550.000 | TON  | \$32.760   | \$312,858.00 |

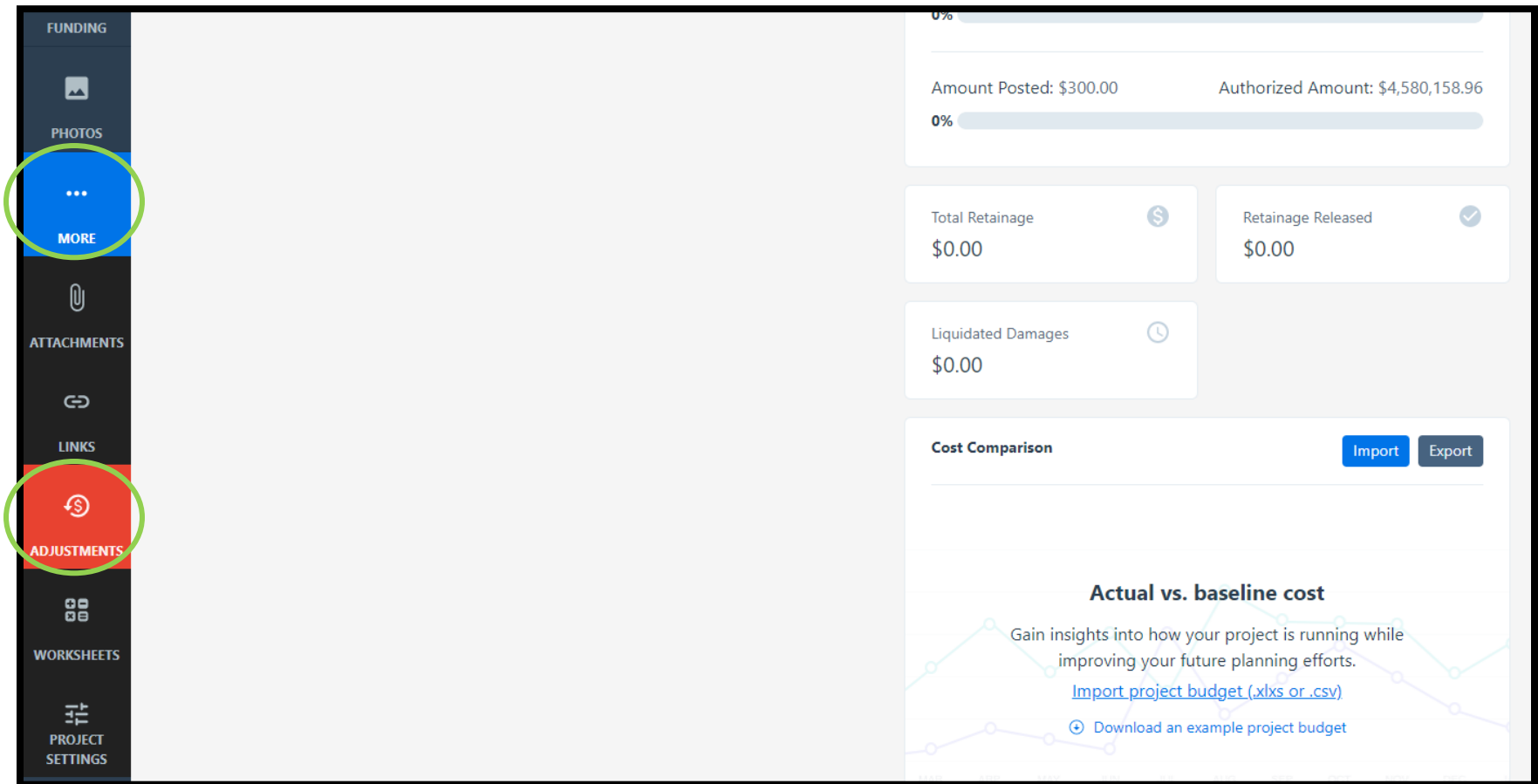
Show funding in dollars?  NO

From this point, follow the guidance in Section 4 - Creating Funding Packages and Sources in the [Appia Project Creation & Account Management Instructions](#).

# 15 - More: Adjustments

**Do NOT use Adjustments on ANY project administered through the Iowa DOT. The DOT requires any payment adjustments to be made via change order.**

If using Adjustments for non-DOT administered projects, Adjustments can be accessed by clicking on More in the left menu and then selecting “Adjustments” from the expanded sub-menu.





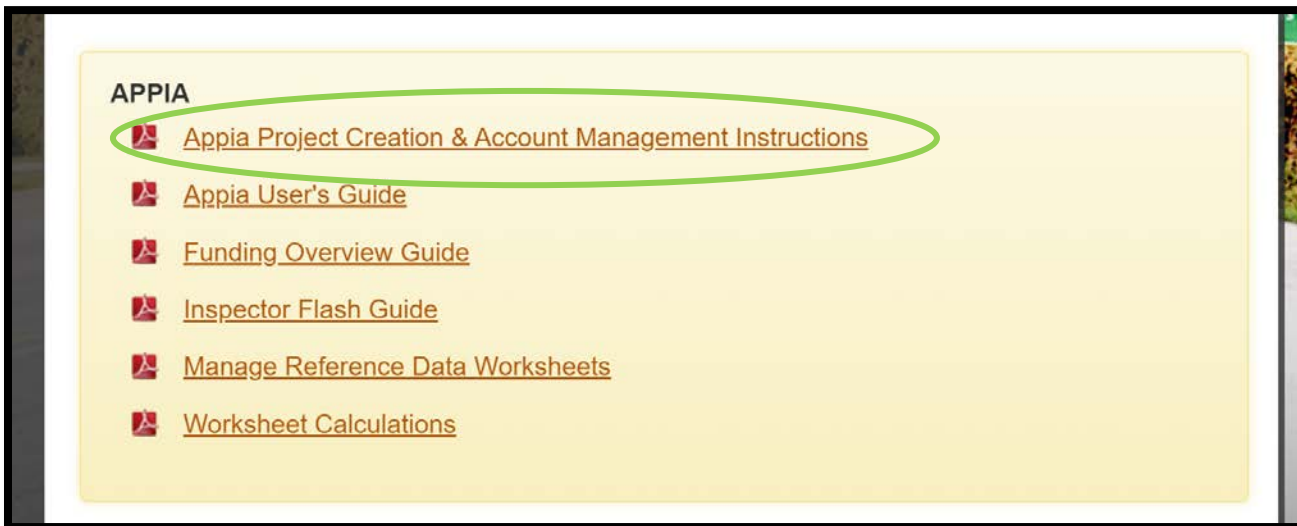
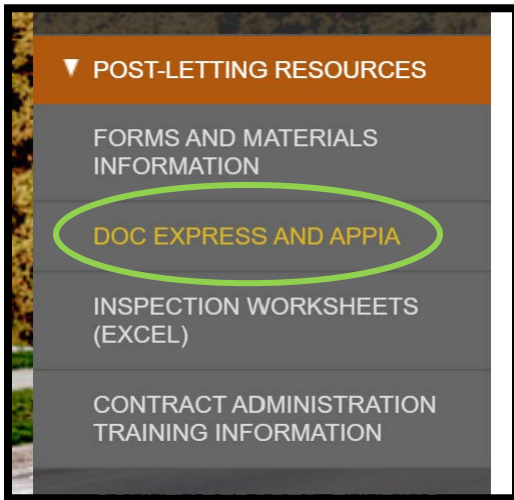
# 16 - More: Worksheets

(Reserved for Worksheets instructions)

This section is reserved for future instructions on Worksheets.

# 17 - More: Project Settings

For instructions on adjusting project settings, please see the “Project Settings” section in the “[Project Creation and Account Management Instructions](#)” located on the [Doc Express and Appia](#) website under “Post-Letting Resources”.



# 18 - Exporting Data: Export Reports (For Audit/Review by Local Systems)

(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. **When a project is ready for audit/review, the Local Systems field staff will require the local agency to upload each of these Item Quantity Summary reports to DocExpress.**

\*\*\*This export will generate a file with individual PDF summaries for each of the bid items with the items' associated Worksheet entries. **If Worksheets are used, these Worksheet History summaries will need to be uploaded (per item) to DocExpress for audit.**

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.

The screenshot displays the 'Export Projects' interface. On the left is a dark sidebar with navigation icons and labels: MY PROJECTS, REFERENCE DATA, SYSTEM MGT, EXPORT DATA (circled in green), EXPORT DATABASE, EXPORT PROJECTS, EXPORT REPORTS (circled in red), and HELP. The main content area is titled 'Export Projects' and 'Projects'. It features a search bar with the placeholder 'Search for Name or Description' and a 'Search' button. Below the search bar is a table with columns for 'Project ID', 'Description', and 'Project Status'. The table lists several projects, many of which are marked as 'Imported' in a yellow box. Each row has a blue downward arrow icon on the right side.

| Project ID  | Description   | Project Status     |
|---|---|--------------------|
| 03-C003-062 <span>Imported</span>                   | 03-C003-062   | Under Construction |
| 11-C011-071 <span>Imported</span>                   | STP-S-C011(71)--5E-11 - 29427   | Under Construction |
| 36-C036-074 JSON TEST/FINANCE <span>Imported</span> |   | 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 |
| BRS-C036(74)--60-36 - AcctID_02_Central01           | Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017        | Under Construction |
| BRS-C036(74)--60-36 - AcctID_03_West01              | Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017        | Under Construction |
| BRS-C036(74)--60-36 - AcctID_05_West02              | Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017        | Under Construction |
| BRS-C036(74)--60-36 - AcctID_06_West02              | Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017        | Under Construction |
| BRS-C036(74)--60-36 - AcctID_07_Central01           | Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017        | Under Construction |
| BRS-C036(74)--60-36 - AcctID_07_West02              | Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017        | Under Construction |

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. Click on “Export”.

Export Reports

You can only export reports for under construction projects.

\* Project  
27-C027-079

\* Start Date  
10/01/2021

\* End Date  
05/23/2022

\* 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

infotech

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The two specific exports that Local Systems staff will need for auditing/review purposes are “Daily Report” and “Item Quantity Summary”. Once extracted the “Daily Report” reports can all be merged into one PDF and placed in the Diaries drawer in Doc Express. The Item Quantity Summary reports should each be named according to the item and the naming convention and uploaded to Doc Express in the “Items and Materials” drawer as shown in the [Doc Express naming convention](#).

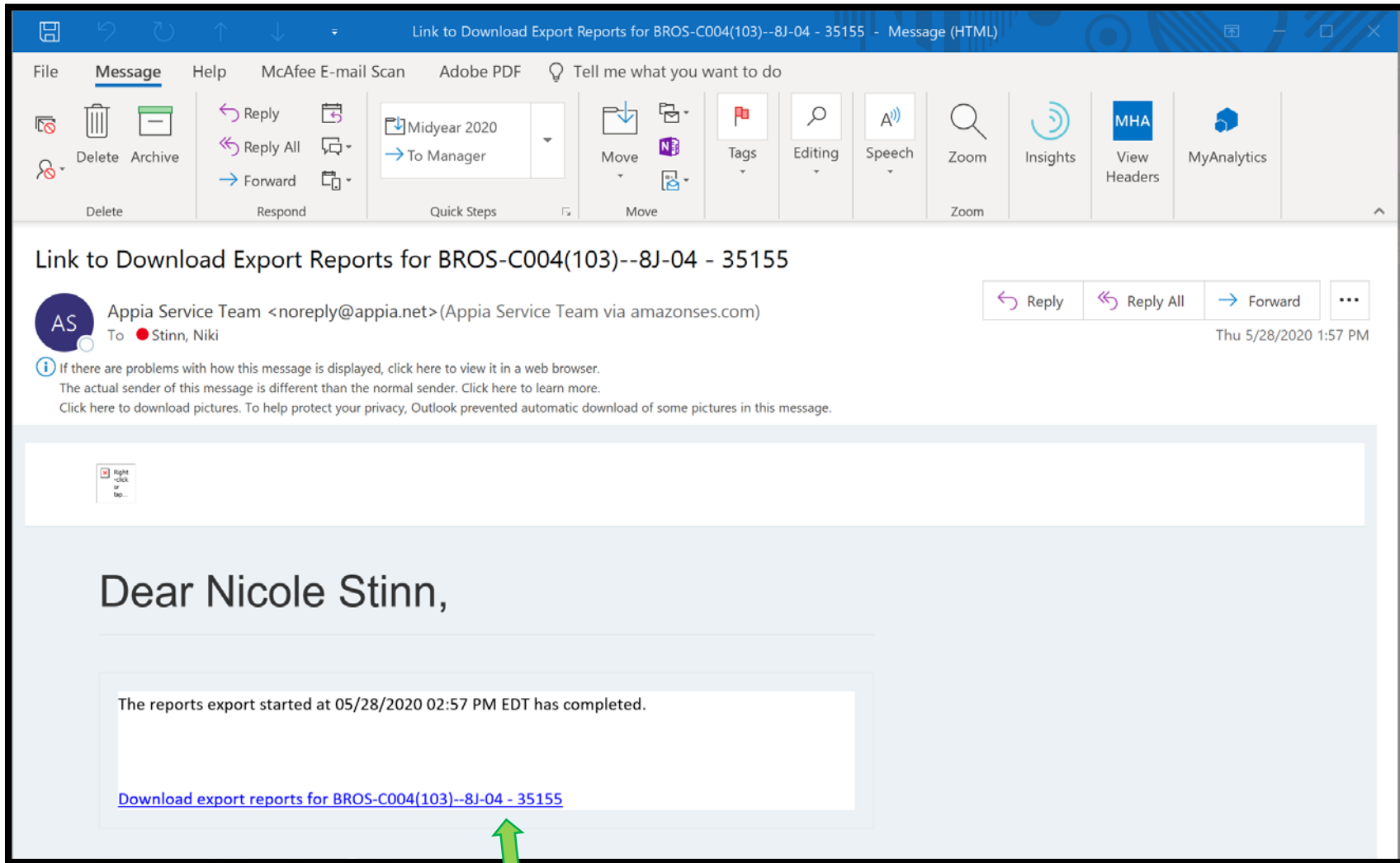


You will be brought back to the project listing screen where a green ribbon will be displayed across the top saying the export is in progress and that you will receive an email with a link to download the exported reports.

The screenshot shows a web application interface for project management. At the top, a green notification banner states: "Export is in progress. You will receive an email with a link to download the export once it is done." Below this, the page title is "My Projects" and the status is "Under Construction". A search bar labeled "Find Project" is present. On the right, there are buttons for "Create Project" and "Import Project", and a status filter set to "Under Construction". A table lists several projects, including "36-C035-074 JSON TEST/FINANCE" with an "Imported" tag. A sidebar on the left contains navigation options: MY PROJECTS, REFERENCE DATA, SYSTEM MGT, EXPORT DATA, and HELP. Two "Pro tip" callouts are visible: one about adding projects to favorites and another about selecting different statuses.

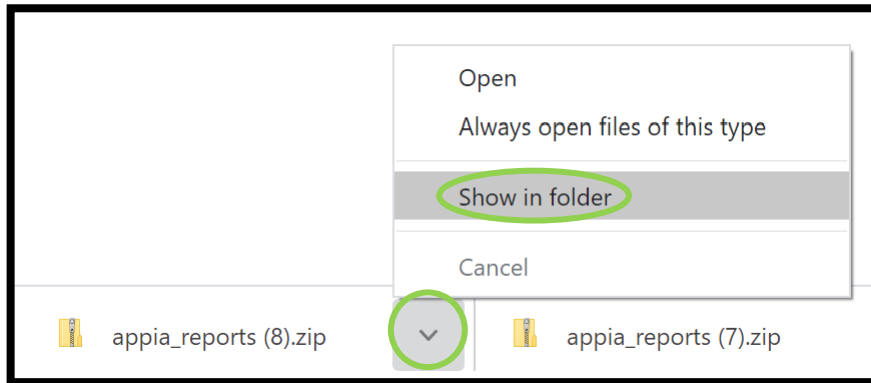
|   | Description   |   |
|---|---|---|
| ★ | 03-C003-062   | ⌵ |
| ★ | STP-S-C011(71)--5E-11 - 29427                       | ⌵ |
| ★ | 36-C035-074 JSON TEST/FINANCE <span>Imported</span> | ⌵ |
| ★ | BHM-SWAP-1827(684)--SA-82-1 12345                   | ⌵ |
| ★ | BROS-C004(103)--8J-04 - 35155       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

The email will look like this.

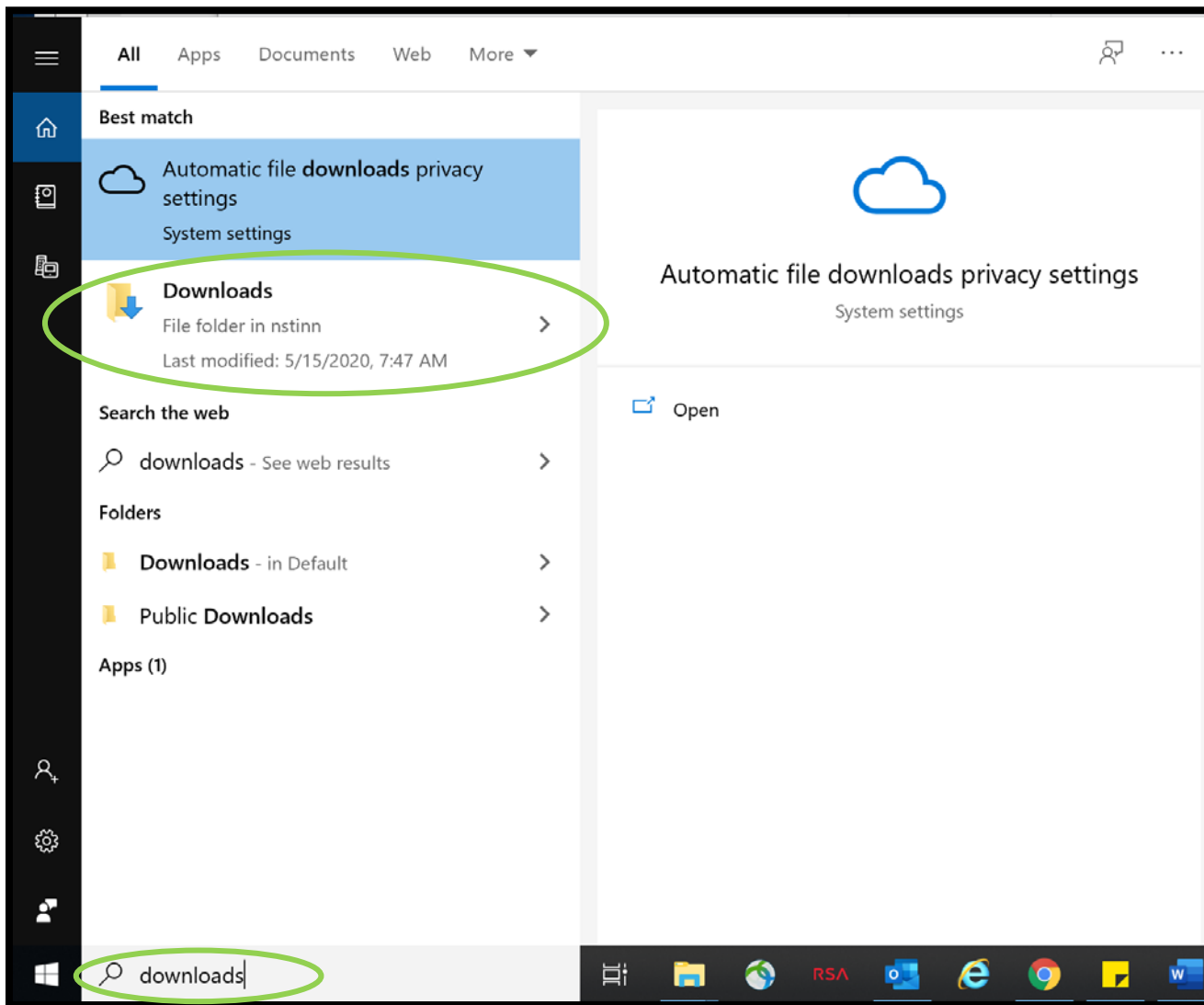


Click on the link here to download the project data.

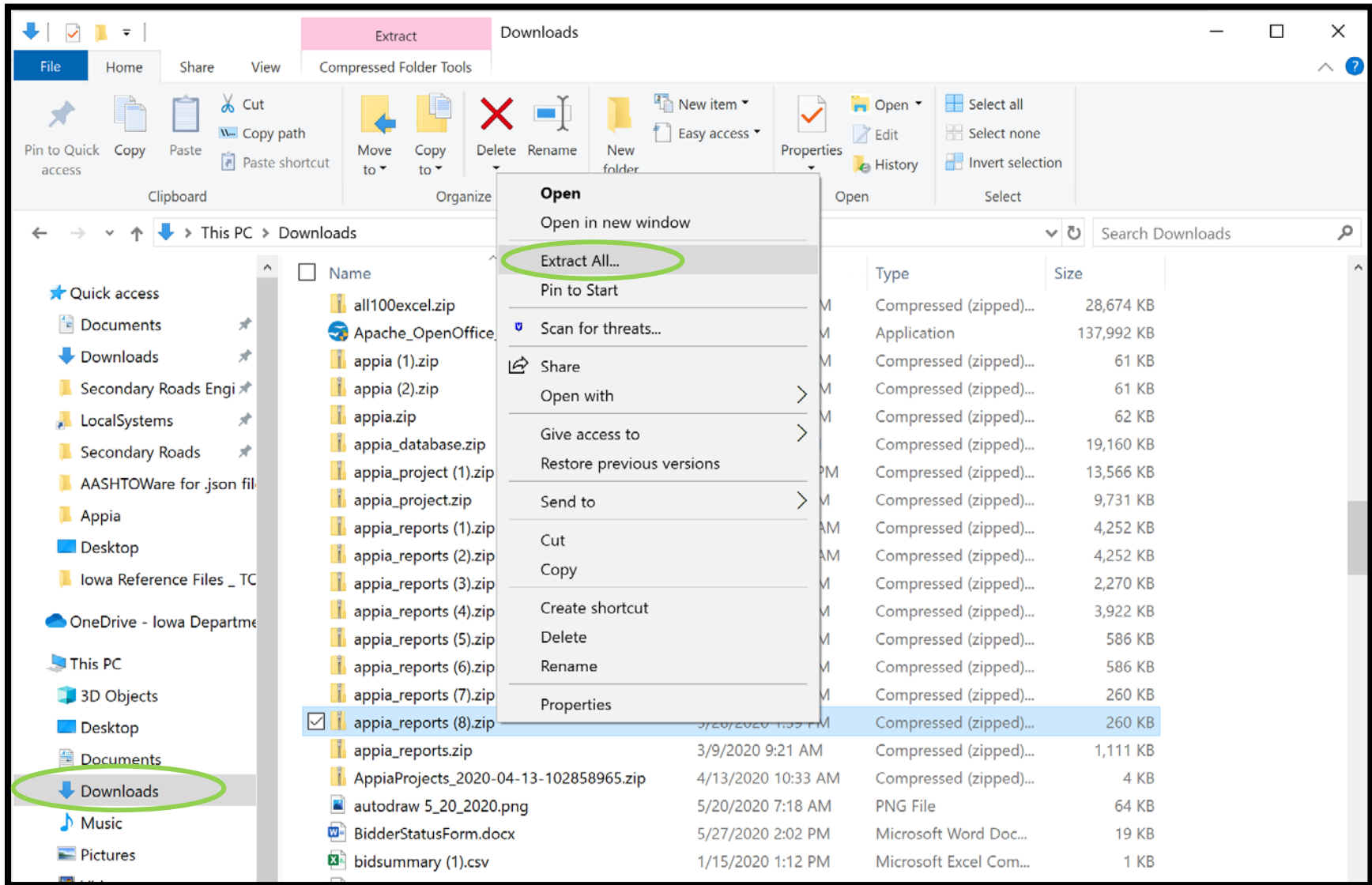
Depending on your browser, your file download may show up at the bottom like this. Click on the arrow to the right of the file name and then “Show in folder” to view the files.



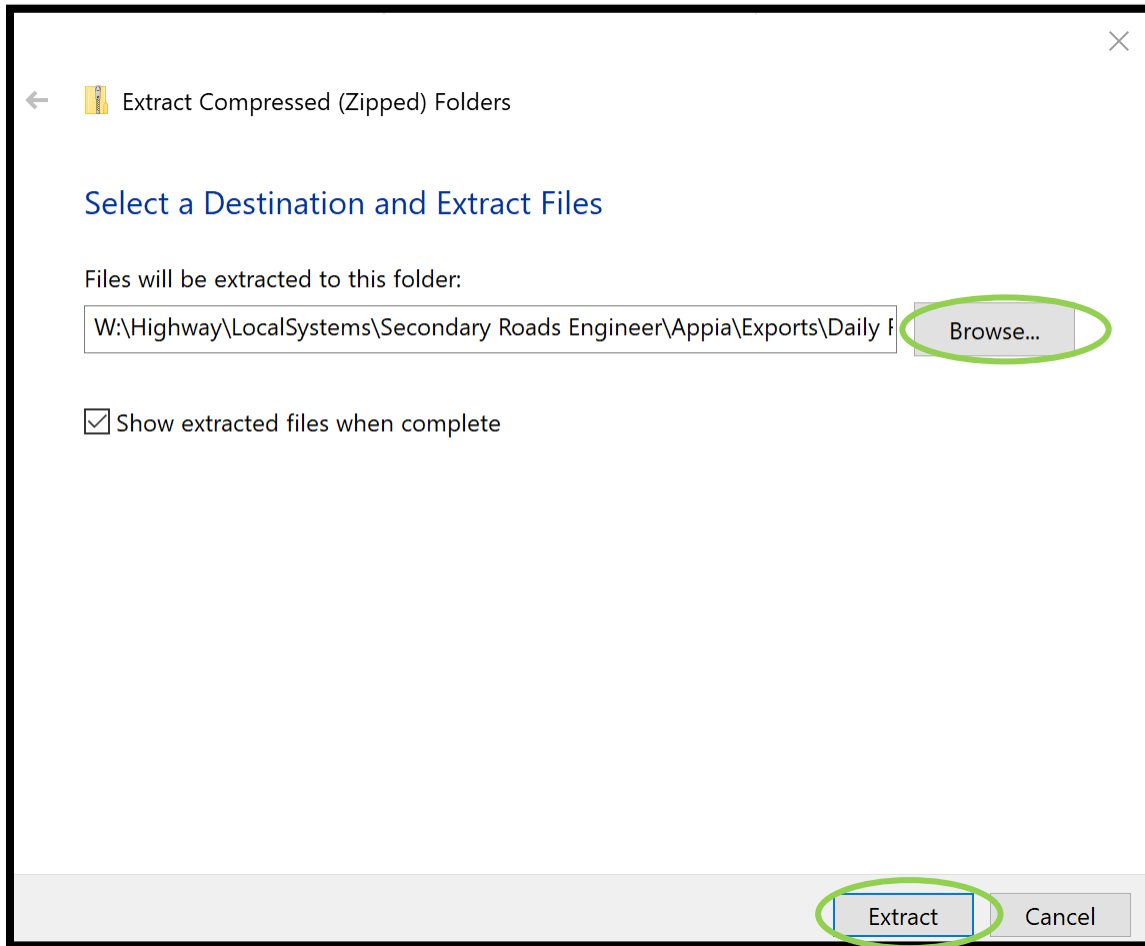
Alternately, once you have clicked on the link in the email, your zipped file can be found in the “Downloads” folder in your file explorer. The “Downloads” folder can be found by typing “downloads” in your search bar.



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



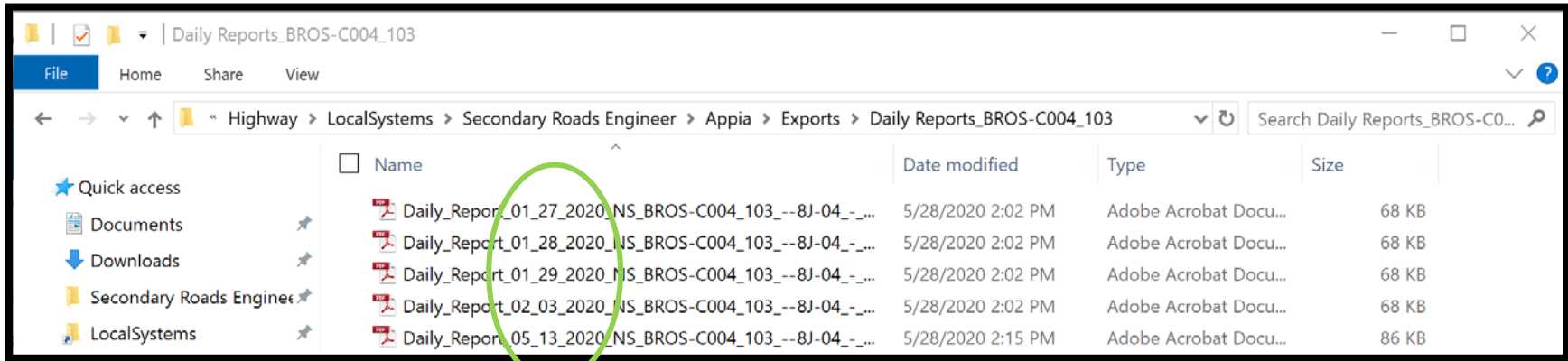
This window will pop up. Browse to find the location where you would like to save your project data.



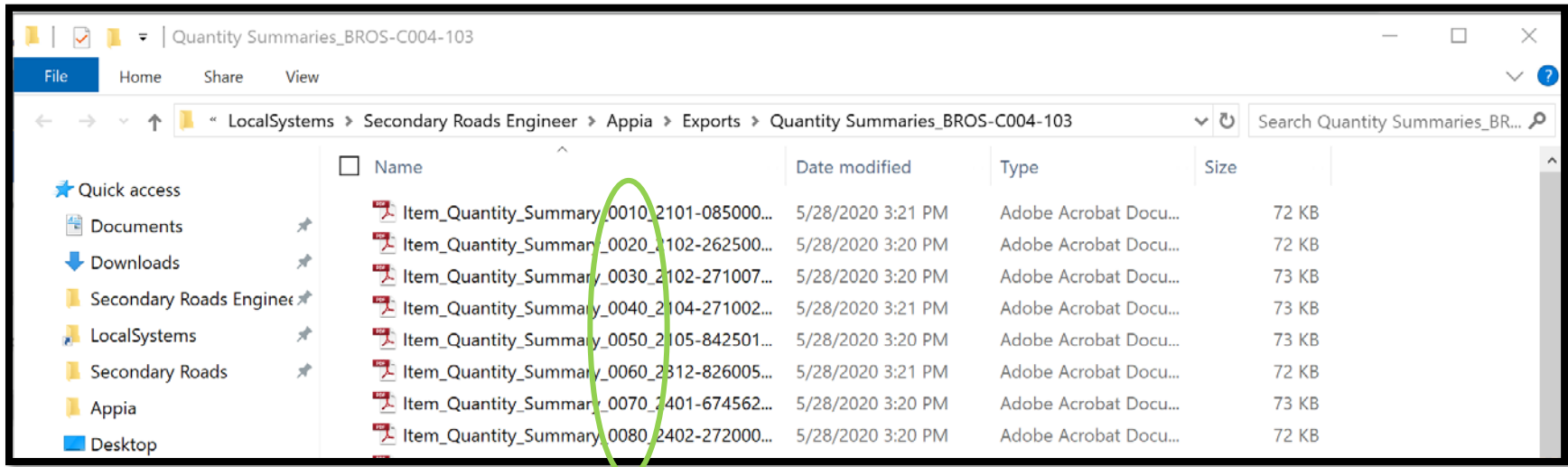
When you have selected the appropriate file in which to save your data, click "Extract".

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


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



Here is a sample of the export containing the Item Quantity Summary 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 |
|---|--------------|------|--------------|--|---------------|
| <b>Section: 0001 - ITEMS FOR A 100'-0 X 24'-6 CONTINUOUS CONCRETE SLAB BRIDGE</b> |              |      |              |  |               |
| 0030  | 2102-2710070 | CY   | \$5.000      | 555.556                                | \$2,777.78    |
| EXCAVATION, CL 10, RDWY+BORROW  |              |      |              |  |               |
| <b>Contractor: CUNNINGHAM-REIS, LLC</b>   |              |      |              |  |               |
| <b>Funding Details</b>  |              |      |              |  |               |
| <b>Default Fund Package</b>   |              |      |              | 555.556                                | \$2,777.78    |
| 0070  | 2401-6745625 | LS   | \$10,000.000 | 0.250                                  | \$2,500.00    |
| RMVL OF EXISTING BRIDGE   |              |      |              |  |               |
| <b>Contractor: CUNNINGHAM-REIS, LLC</b>   |              |      |              |  |               |
| <b>Funding Details</b>  |              |      |              |  |               |
| <b>Default Fund Package</b>   |              |      |              | 0.250                                  | \$2,500.00    |
| <b>2 item postings</b>  |              |      |              | <b>Total Posted Amount: \$5,277.78</b> |               |

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

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

Line Number

0030

Item

2102-2710070

Description

EXCAVATION, CL 10, RDWY+BORROW

Unit

CY

Unit Price

\$5.00

Original Quantity

1,600.000

Quantity Paid

0.000

Authorized Quantity

1,600.000

Quantity Placed but not Paid

1,444.445

Total Quantity Placed

1,444.445

Amount Paid

\$0.00

Quantity Remaining

155.555

Amount Unpaid

\$7,222.23

Pending Quantity

0.000

Authorized Amount

\$8,000.00

#### Postings

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

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

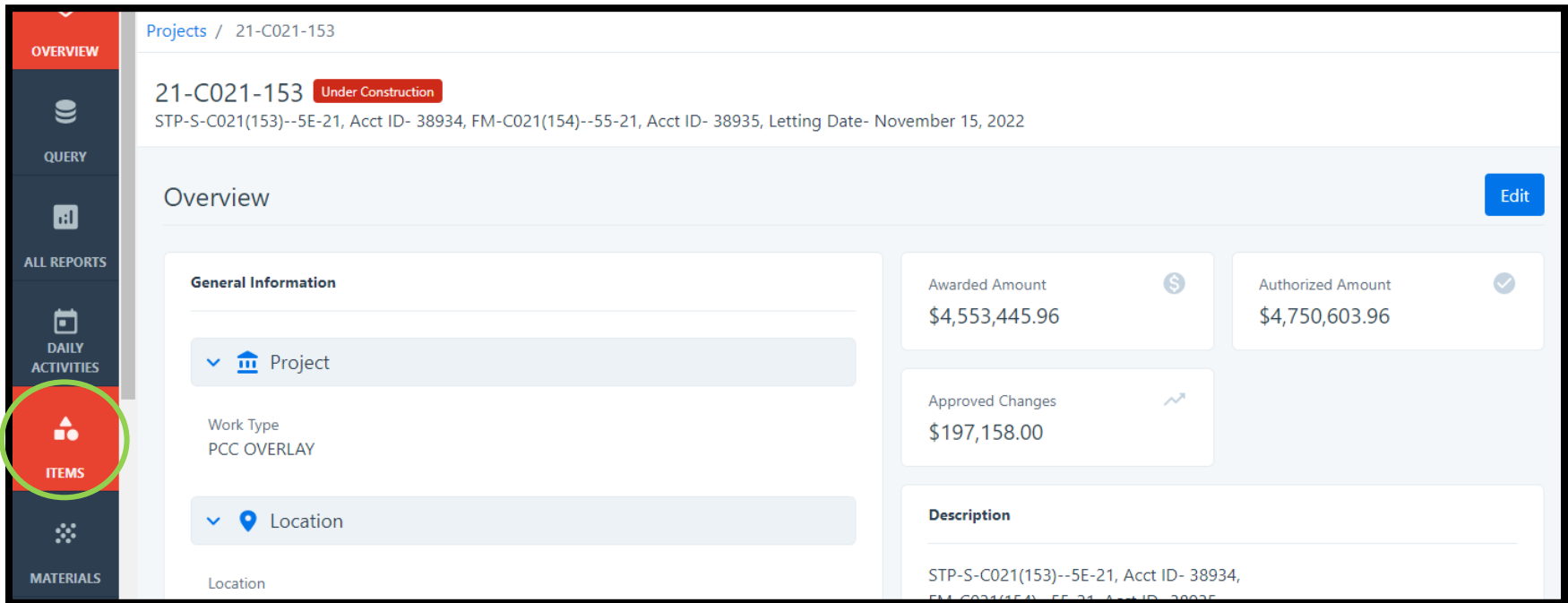
05/28/2020  
Page 1 of 1

# 19 - EZ Forms Exports

## A. EZ Forms (E-Sheets)

The EZ Forms workbook is an automated workbook that assembles all the E-Sheets for a contract. It provides integrated tracking capabilities for item certifications and testing requirements and includes links to specification sections and other useful references. The EZ Forms workbook is not yet available online. However, a copy can be requested from the LPA's [Local Systems Regional Field Technician](#).

You can export an Items report from Appia that can be loaded into the EZ Forms workbook. To generate the Items report for the EZ Forms Workbook, click on Items in the left menu.



The screenshot displays the Appia software interface for project 21-C021-153. The left sidebar contains navigation options: OVERVIEW, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS (highlighted with a red circle), and MATERIALS. The main content area shows the project overview, including a status indicator 'Under Construction' and a list of account IDs. The 'Overview' section is divided into 'General Information' and 'Description'. The 'General Information' section includes a 'Project' dropdown menu, 'Work Type' (PCC OVERLAY), and a 'Location' dropdown menu. The 'Description' section contains the project details. On the right side, there are summary cards for 'Awarded Amount' (\$4,553,445.96), 'Authorized Amount' (\$4,750,603.96), and 'Approved Changes' (\$197,158.00). An 'Edit' button is located in the top right corner of the overview section.

In the Items screen, click on the gray “Actions” near the upper, right corner. Then select, “Export CSV” from the pull-down menu.

Projects / 21-C021-153 / Items

21-C021-153 Under Construction Reports

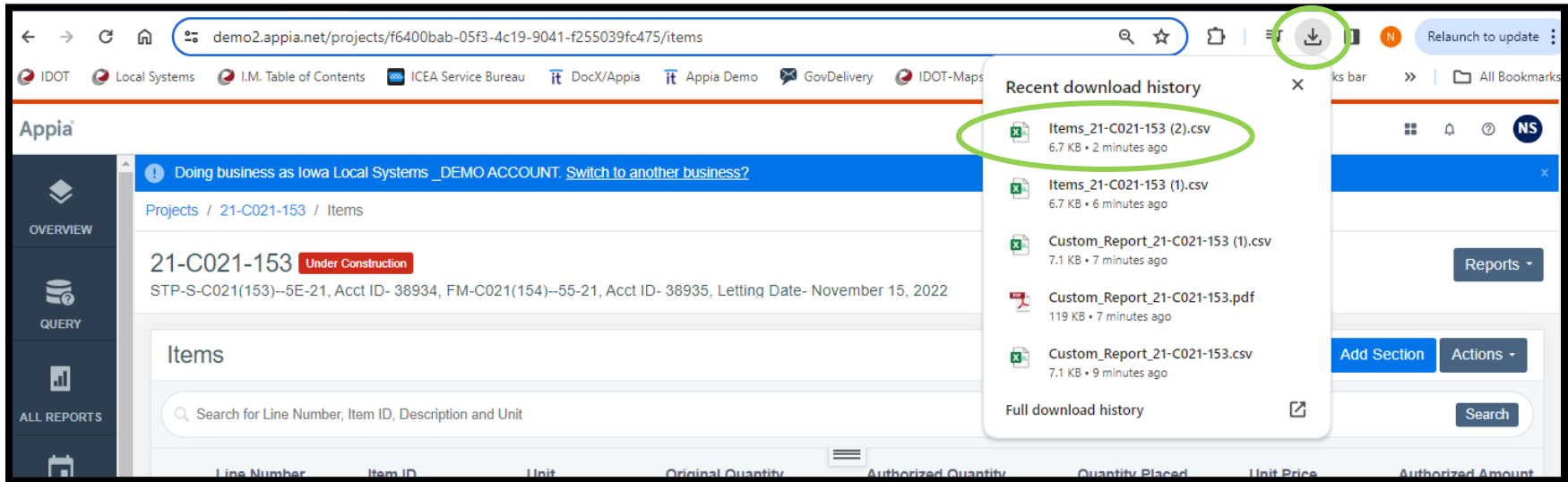
STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

### Items

Search for Line Number, Item ID, Description and Unit

| Line Number   | Item ID      | Unit | Original Quantity | Authorized Quantity | Quantity Placed | Unit Price | Authorized Amount |
|---|--------------|------|-------------------|---------------------|-----------------|------------|-------------------|
| Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS <span>Add Unattached</span> |              |      |                   |                     |                 |            |                   |
| 0010  | 2110-3825010 | TON  | 760.000           | 760.000             | 0.000           | \$7.900    | \$6,004.00        |
| GRANULAR MATERIAL   |              |      |                   |                     |                 |            |                   |
| Quantity Placed   |              |      |                   | Quantity Paid       |                 |            |                   |
| 0.0%  |              |      |                   | 0.0%                |                 |            |                   |
| 0020  | 2121-7425020 | TON  | 9,550.000         | 9,550.000           | 0.000           | \$32.760   | \$312,858.00      |
| GRANULAR SHOULDERS, TYPE B  |              |      |                   |                     |                 |            |                   |
| Quantity Placed   |              |      |                   | Quantity Paid       |                 |            |                   |

A .csv file will download in your browser. This is an example of where the download can be accessed from the Google Chrome browser. Other browsers will be different.



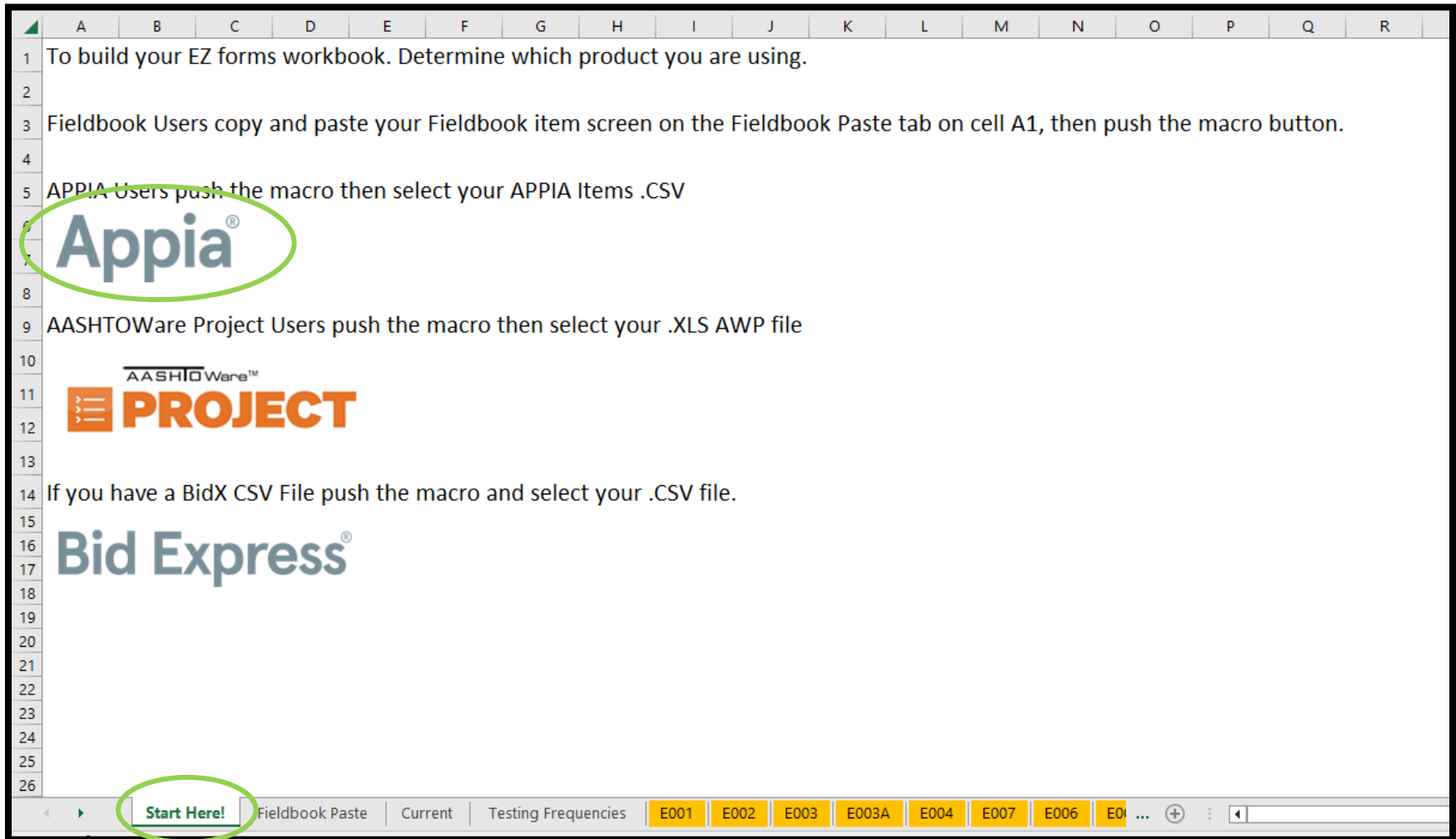
The downloaded file will look like the following. It should have no header information except the column labels and should contain these exact columns in this exact order.

- Section Number
- Section Description
- Line Number
- Item ID
- Description
- Supplemental Description
- Unit
- Original Qty
- Authorized Qty
- Qty Placed
- Unit Price
- Authorized Amount

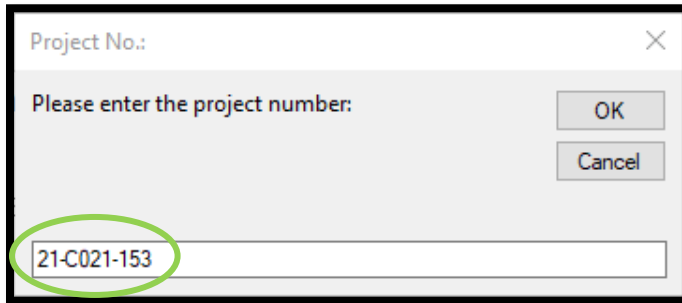
|    | A          | B            | C        | D         | E                    | F                 | G | H            | I              | J          | K          | L                 | M |
|----|------------|--------------|----------|-----------|----------------------|-------------------|---|--------------|----------------|------------|------------|-------------------|---|
| 1  | Section No | Section Desc | Line Num | Item ID   | Description          | Supplemental Unit |   | Original Qty | Authorized Qty | Placed Qty | Unit Price | Authorized Amount |   |
| 2  | 1          | STP-S-C02    | 10       | 2110-3825 | GRANULAR MATERIAL    | TON               |   | 760          | 760            | 0          | 7.9        | 6004              |   |
| 3  | 1          | STP-S-C02    | 20       | 2121-7425 | GRANULAR SHOULDER    | TON               |   | 9550         | 9550           | 0          | 32.76      | 312858            |   |
| 4  | 1          | STP-S-C02    | 30       | 2214-5145 | PAVEMENT SCARIFYING  | SY                |   | 74947        | 74827          | 0          | 1.35       | 101016.5          |   |
| 5  | 1          | STP-S-C02    | 40       | 2301-0690 | BRIDGE APPROACH      | SY                |   | 97.8         | 97.8           | 0          | 200        | 19560             |   |
| 6  | 1          | STP-S-C02    | 50       | 2301-1032 | STANDARD OR SLIP     | FSY               |   | 2813         | 2813           | 210        | 68.15      | 191706            |   |
| 7  | 1          | STP-S-C02    | 60       | 2301-9091 | RUMBLE STRIP PANEL   | EACH              |   | 6            | 9              | 0          | 25         | 225               |   |
| 8  | 1          | STP-S-C02    | 70       | 2310-5151 | PORTLAND CEMENT      | CY                |   | 12491        | 12491          | 20         | 112.95     | 1410858           |   |
| 9  | 1          | STP-S-C02    | 80       | 2310-5151 | PORTLAND CEMENT      | SY                |   | 74947        | 74947          | 0          | 4.5        | 337261.5          |   |
| 10 | 1          | STP-S-C02    | 90       | 2315-8275 | SURFACING, DRIVEWAY  | TON               |   | 1140         | 1140           | 0          | 35.05      | 39957             |   |
| 11 | 1          | STP-S-C02    | 100      | 2316-0000 | PAYMENT ADJUSTMENT   | EACH              |   | 58320        | 58320          | 0          | 1          | 58320             |   |
| 12 | 1          | STP-S-C02    | 110      | 2505-4008 | REMOVAL OF STEEL     | LF                |   | 260          | 260            | 0          | 15         | 3900              |   |
| 13 | 1          | STP-S-C02    | 120      | 2505-4008 | STEEL BEAM GUARDRAIL | EACH              |   | 4            | 4              | 0          | 2000       | 8000              |   |
| 14 | 1          | STP-S-C02    | 130      | 2505-4021 | STEEL BEAM GUARDRAIL | EACH              |   | 4            | 4              | 0          | 300        | 1200              |   |
| 15 | 1          | STP-S-C02    | 140      | 2505-4021 | STEEL BEAM GUARDRAIL | EACH              |   | 4            | 4              | 0          | 3418.5     | 13674             |   |
| 16 | 1          | STP-S-C02    | 150      | 2510-6745 | REMOVAL OF PAVEMENT  | SY                |   | 2813         | 2813           | 0          | 3.26       | 9170.38           |   |
| 17 | 1          | STP-S-C02    | 160      | 2526-8285 | CONSTRUCTION SURVEY  | LS                |   | 1            | 1              | 0          | 55000      | 55000             |   |
| 18 | 1          | STP-S-C02    | 170      | 2527-9263 | PAINTED PAVEMENT     | STA               |   | 851.07       | 851.07         | 0          | 17         | 14468.19          |   |
| 19 | 1          | STP-S-C02    | 180      | 2528-2518 | SAFETY CLOSURE       | EACH              |   | 16           | 16             | 0          | 125        | 2000              |   |
| 20 | 1          | STP-S-C02    | 190      | 2528-8445 | TRAFFIC CONTROL      | LS                |   | 1            | 1              | 0          | 28525      | 28525             |   |
| 21 | 1          | STP-S-C02    | 200      | 2533-4980 | MOBILIZATION         | LS                |   | 1            | 1              | 0          | 150390     | 150390            |   |
| 22 | 1          | STP-S-C02    | 210      | 2555-0000 | DELIVER AND STOCK    | LS                |   | 1            | 1              | 0          | 5475       | 5475              |   |
| 23 | 1          | STP-S-C02    | 8001     | 2217-1000 | RUBBLIZED PAV'T      | SY                |   | 0            | 160            | 10         | 30         | 4800              |   |
| 24 | 1          | STP-S-C02    | 8002     | 2301-0690 | BRIDGE APPROACH      | SY                |   | 0            | 100            | 0          | 220        | 22000             |   |
| 25 | 1          | STP-S-C02    | 8010     | 2107-3825 | GRANULAR MATERIAL    | CY                |   | 0            | 0              | 0          | 0          | 0                 |   |
| 26 | 2          | FM-C021(     | 220      | 2110-3825 | GRANULAR MATERIAL    | TON               |   | 319          | 319            | 0          | 7.9        | 2520.1            |   |
| 27 | 2          | FM-C021(     | 230      | 2121-7425 | GRANULAR SHOULDER    | TON               |   | 6330         | 6330           | 0          | 32.76      | 207370.8          |   |
| 28 | 2          | FM-C021(     | 240      | 2214-5145 | PAVEMENT SCARIFYING  | SY                |   | 50893        | 50893          | 0          | 1.35       | 68705.55          |   |
| 29 | 2          | FM-C021(     | 250      | 2301-1032 | STANDARD OR SLIP     | FSY               |   | 1097         | 1397           | 10         | 68.15      | 95205.55          |   |
| 30 | 2          | FM-C021(     | 260      | 2301-9091 | RUMBLE STRIP PANEL   | EACH              |   | 4            | 4              | 0          | 25         | 100               |   |
| 31 | 2          | FM-C021(     | 270      | 2310-5151 | PORTLAND CEMENT      | CY                |   | 8482         | 8482           | 50         | 112.95     | 958041.9          |   |
| 32 | 2          | FM-C021(     | 280      | 2310-5151 | PORTLAND CEMENT      | SY                |   | 50893        | 50893          | 0          | 4.5        | 229018.5          |   |

Save the downloaded file to the desired location on your computer or server. Do NOT change the .csv file extension.

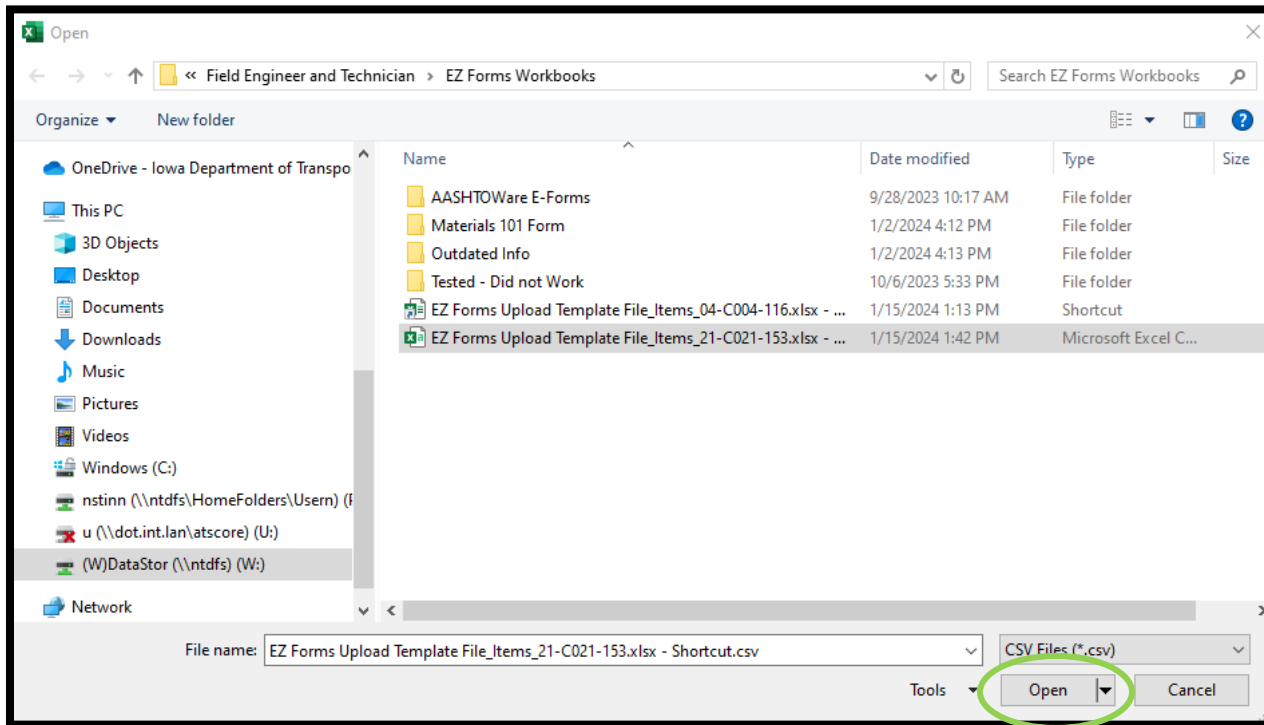
Open the EZ Forms Workbook. On the “Start Here!” tab, there is an “Appia” button. Push this button to begin uploading your saved Appia file to the EZ Forms Workbook.



Clicking on the “Appia” button will cause a pop-up box to appear saying, “Please enter the project number:”. Because the workbook will contain items from all tied projects in a contract, enter the Contract ID for your contract. (This is the name of the project in Appia.) Then click “Ok”.

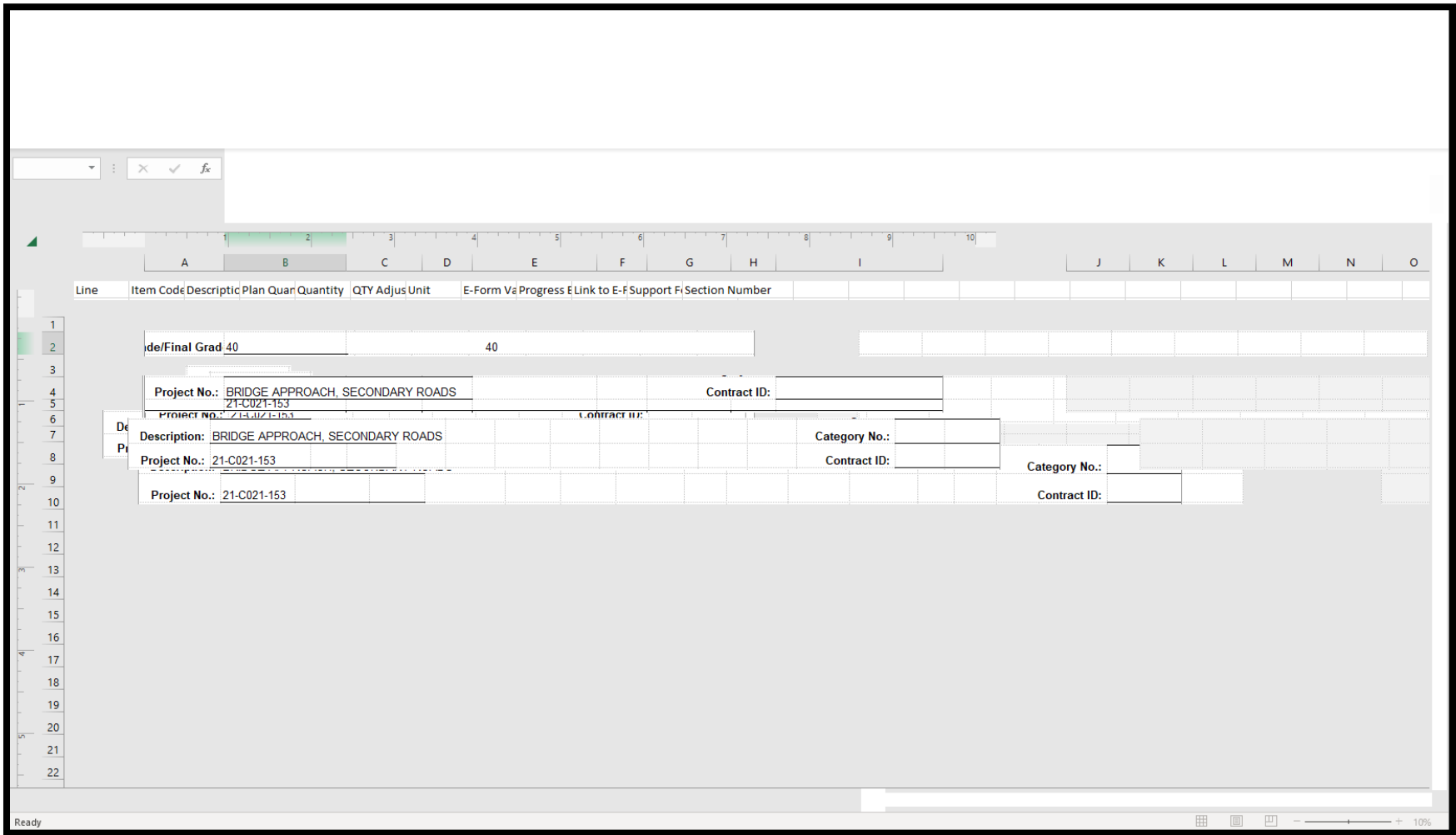


A Windows Explorer box will open. Navigate to the location where you saved the downloaded Appia file. Select the file, and then click “Open”.





The EZ Forms Workbook builder will start to run. You may see some blinking cells and partial screens while the macros run and create the workbook. This is OK and normal.



When the macros are done running and the workbook has been assembled, the screen will stop changing, and you will be brought to the Table of Contents page where all the items are listed.

| Line | Item Code    | Description  | Plan Quant | Quant | QTY Adjustm | Unit | E-Form Val | Progress | E-Form | Link to E-Form                           | Support Forms   |
|------|--------------|--|------------|-------|-------------|------|------------|----------|--------|--|---|
| 10   | 2110-3825010 | GRANULAR MATERIAL  | 760        |       |             | TON  | 0          | 0.00%    |        | <a href="#">Link to Line 10 - E001</a>   | <a href="#">Line 10 - E110</a>                                    |
| 20   | 2121-7425020 | GRANULAR SHOULDERS, TYPE B   | 9550       |       |             | TON  | 0          | 0.00%    |        | <a href="#">Link to Line 20 - E007</a>   |   |
| 30   | 2214-5145150 | PAVEMENT SCARIFICATION   | 74827      |       |             | SY   | 0          | 0.00%    |        | <a href="#">Link to Line 30 - E003</a>   |   |
| 40   | 2301-0690220 | BRIDGE APPROACH, SECONDARY ROADS                                   | 97.8       |       |             | SY   | 0          | 0.00%    |        | <a href="#">Link to Line 40 - E023</a>   | <a href="#">Line 40 - E109, Line 40 - E110, Line 40 - E111</a>    |
| 50   | 2301-1032090 | STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT            | 2813       |       |             | SY   | 0          | 0.00%    |        | <a href="#">Link to Line 50 - E023</a>   | <a href="#">Line 50 - E109, Line 50 - E110, Line 50 - E111</a>    |
| 60   | 2301-9091000 | RUMBLE STRIP PANEL (PCC SURFACE)                                   | 9          |       |             | EACH | 0          | 0.00%    |        | <a href="#">Link to Line 60 - E039</a>   |   |
| 70   | 2310-5151040 | PORTLAND CEMENT CONCRETE OVERLAY, FURNISH ONLY                     | 12491      |       |             | CY   | 0          | 0.00%    |        | <a href="#">Link to Line 70 - E001</a>   | <a href="#">Line 70 - E115</a>                                    |
| 80   | 2310-5151045 | PORTLAND CEMENT CONCRETE OVERLAY, PLACEMENT ONLY                   | 74947      |       |             | SY   | 0          | 0.00%    |        | <a href="#">Link to Line 80 - E003</a>   | <a href="#">Line 80 - E109</a>                                    |
| 90   | 2315-8275055 | SURFACING, DRIVEWAY  | 1140       |       |             | TON  | 0          | 0.00%    |        | <a href="#">Link to Line 90 - E001</a>   |   |
| 100  | 2316-0000110 | PAYMENT ADJUSTMENT INCENTIVE/DISINCENTIVE FOR PCC PAVEMENT SMOOTHN | 58320      |       |             | EACH | 0          | 0.00%    |        | <a href="#">Link to Line 100 - E001</a>  |   |
| 110  | 2505-4008120 | REMOVAL OF STEEL BEAM GUARDRAIL                                    | 260        |       |             | LF   | 0          | 0.00%    |        | <a href="#">Link to Line 110 - E039</a>  |   |
| 120  | 2505-4008410 | STEEL BEAM GUARDRAIL BARRIER TRANSITION SECTION, BA-201            | 4          |       |             | EACH | 0          | 0.00%    |        | <a href="#">Link to Line 120 - E039</a>  |   |
| 130  | 2505-4021010 | STEEL BEAM GUARDRAIL END ANCHOR, BOLTED                            | 4          |       |             | EACH | 0          | 0.00%    |        | <a href="#">Link to Line 130 - E039</a>  |   |
| 140  | 2505-4021720 | STEEL BEAM GUARDRAIL TANGENT END TERMINAL, BA-205                  | 4          |       |             | EACH | 0          | 0.00%    |        | <a href="#">Link to Line 140 - E039</a>  |   |
| 150  | 2510-6745850 | REMOVAL OF PAVEMENT  | 2813       |       |             | SY   | 0          | 0.00%    |        | <a href="#">Link to Line 150 - E003</a>  |   |
| 160  | 2526-8285000 | CONSTRUCTION SURVEY  | 1          |       |             | LS   | 0.00       | 0.00%    |        | <a href="#">Link to Line 160 - E005</a>  |   |
| 170  | 2527-9263109 | PAINTED PAVEMENT MARKING, WATERBORNE OR SOLVENT-BASED              | 851.07     |       |             | STA  | 0          | 0.00%    |        | <a href="#">Link to Line 170 - E026</a>  |   |
| 180  | 2528-2518000 | SAFETY CLOSURE   | 16         |       |             | EACH | 0          | 0.00%    |        | <a href="#">Link to Line 180 - E039</a>  |   |
| 190  | 2528-8445110 | TRAFFIC CONTROL  | 1          |       |             | LS   | 0.00       | 0.00%    |        | <a href="#">Link to Line 190 - E005</a>  | <a href="#">Line 190 - E126</a>                                   |
| 200  | 2533-4980005 | MOBILIZATION   | 1          |       |             | LS   | \$0.00     | 0.00%    |        | <a href="#">Link to Line 200 - E030</a>  |   |
| 210  | 2555-0000010 | DELIVER AND STOCKPILE SALVAGED MATERIALS                           | 1          |       |             | LS   | 0.00       | 0.00%    |        | <a href="#">Link to Line 210 - E005</a>  |   |
| 8001 | 2217-1000000 | RUBBLIZED PAV'T  | 160        |       |             | SY   | 0          | 0.00%    |        | <a href="#">Link to Line 8001 - E003</a> |   |
| 8010 | 2107-3825025 | GRANULAR MATERIAL FOR BLANKET AND SUBDRAIN                         | 0          |       |             | CY   | 0          | #DIV/0!  |        | <a href="#">Link to Line 8010 - E004</a> |   |
| 220  | 2110-3825010 | GRANULAR MATERIAL  | 319        |       |             | TON  | 0          | 0.00%    |        | <a href="#">Link to Line 220 - E001</a>  | <a href="#">Line 220 - E110</a>                                   |
| 230  | 2121-7425020 | GRANULAR SHOULDERS, TYPE B   | 6330       |       |             | TON  | 0          | 0.00%    |        | <a href="#">Link to Line 230 - E007</a>  |   |
| 240  | 2214-5145150 | PAVEMENT SCARIFICATION   | 50893      |       |             | SY   | 0          | 0.00%    |        | <a href="#">Link to Line 240 - E003</a>  |   |
| 250  | 2301-1032090 | STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT            | 1397       |       |             | SY   | 0          | 0.00%    |        | <a href="#">Link to Line 250 - E023</a>  | <a href="#">Line 250 - E109, Line 250 - E110, Line 250 - E111</a> |
| 260  | 2301-9091000 | RUMBLE STRIP PANEL (PCC SURFACE)                                   | 4          |       |             | EACH | 0          | 0.00%    |        | <a href="#">Link to Line 260 - E039</a>  |   |
| 270  | 2310-5151040 | PORTLAND CEMENT CONCRETE OVERLAY, FURNISH ONLY                     | 8482       |       |             | CY   | 0          | 0.00%    |        | <a href="#">Link to Line 270 - E001</a>  | <a href="#">Line 270 - E115</a>                                   |
| 280  | 2310-5151045 | PORTLAND CEMENT CONCRETE OVERLAY, PLACEMENT ONLY                   | 50893      |       |             | SY   | 0          | 0.00%    |        | <a href="#">Link to Line 280 - E003</a>  | <a href="#">Line 280 - E109</a>                                   |

The assembled EZ Forms workbook for your project automatically saves to the location where the Appia file was saved. It will have the name “Project [Project Number]” where [Project Number] is the contract ID you entered in a previous step.

You are now ready to use the EZ Forms workbook in place of the standard E-Sheets.

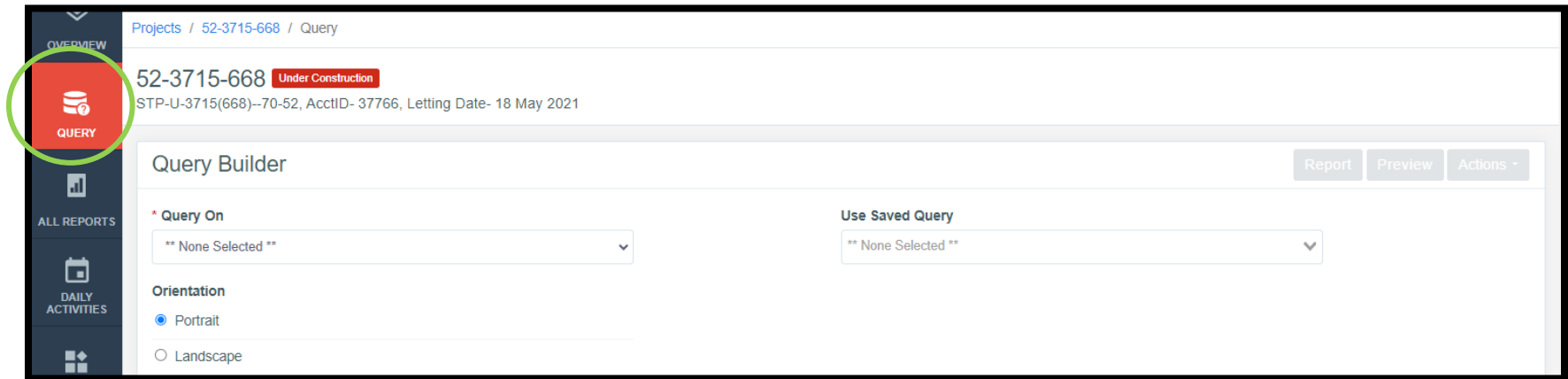
Contact your [Local Systems Regional Field Technician](#) with questions about the workbook.

## B. Materials 101 EZ Form

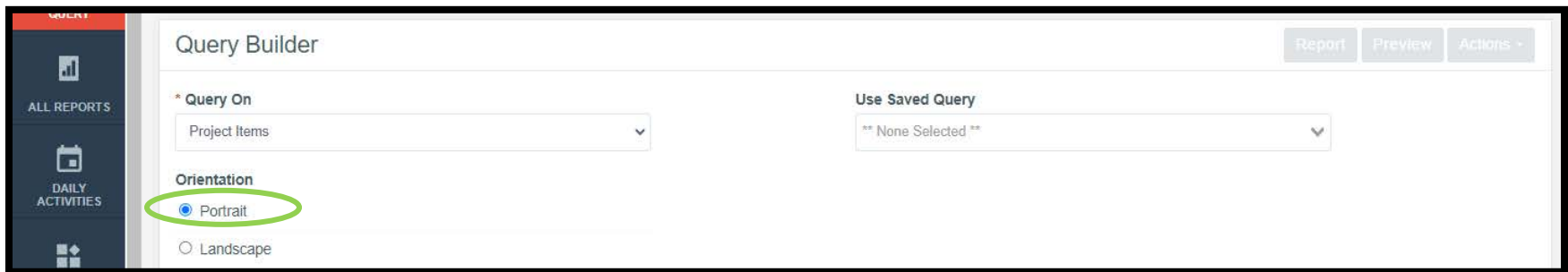
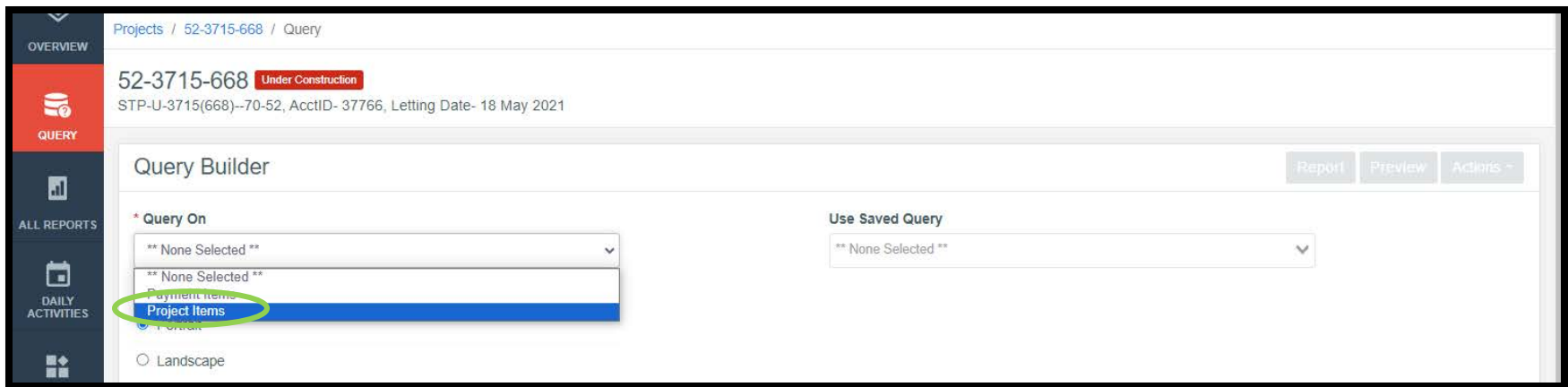
The Materials 101 EZ Form is a semi-automated version of the Materials 101 form required for project audits. The Materials 101 EZ Form is not yet available online. However, a copy can be requested from the LPA's [Local Systems Regional Field Technician](#).

You can export a queried report from Appia that can be loaded into the Materials101 EZ Form. When loaded into the Materials101 EZ Form, the item description, units, and quantity paid will all populate automatically once the user enters the bid item's line number in the "Contract Item No" line in on the sheets.

To generate the report for the Materials101 EZ Form, click on Query on the left menu.

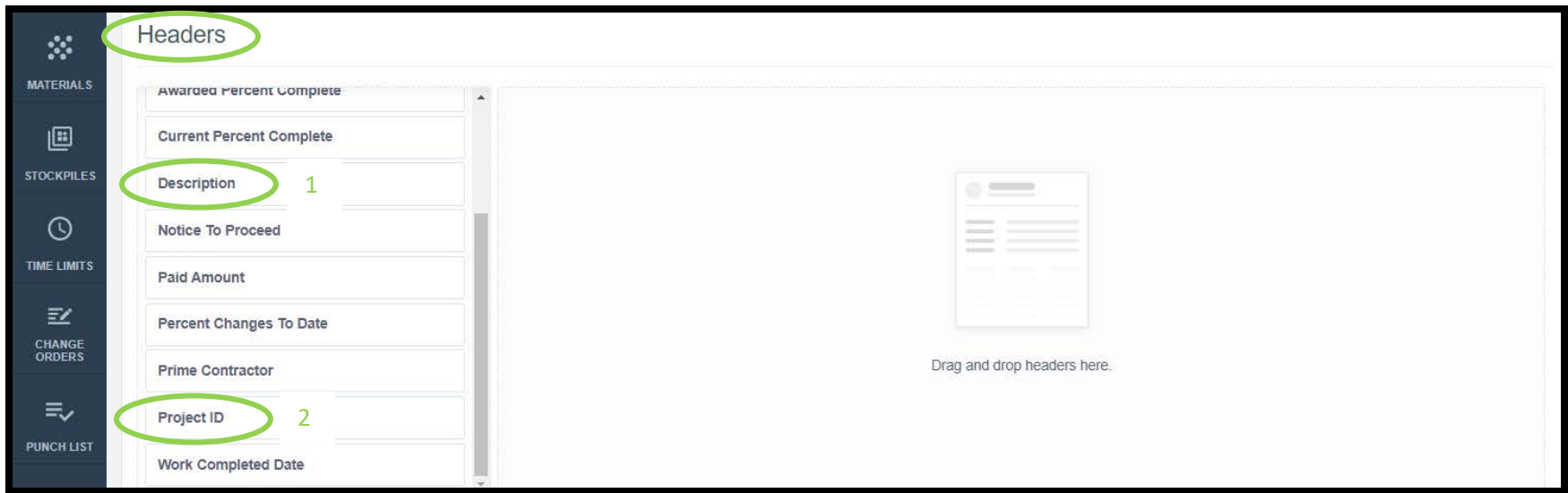


When building the report for the first time, in the "Query On" pull-down menu, select "Project Items". Leave the "Orientation" set to Portrait. (Once this report is built, you will be instructed on how to save it, and the report can be selected from the "Use Saved Query" pull-down menu in the future.)



Once “Project Items” is selected from the “Query On” pull-down menu, two sections will appear on the lower part of the screen. These sections are “Headers” and “Body”.

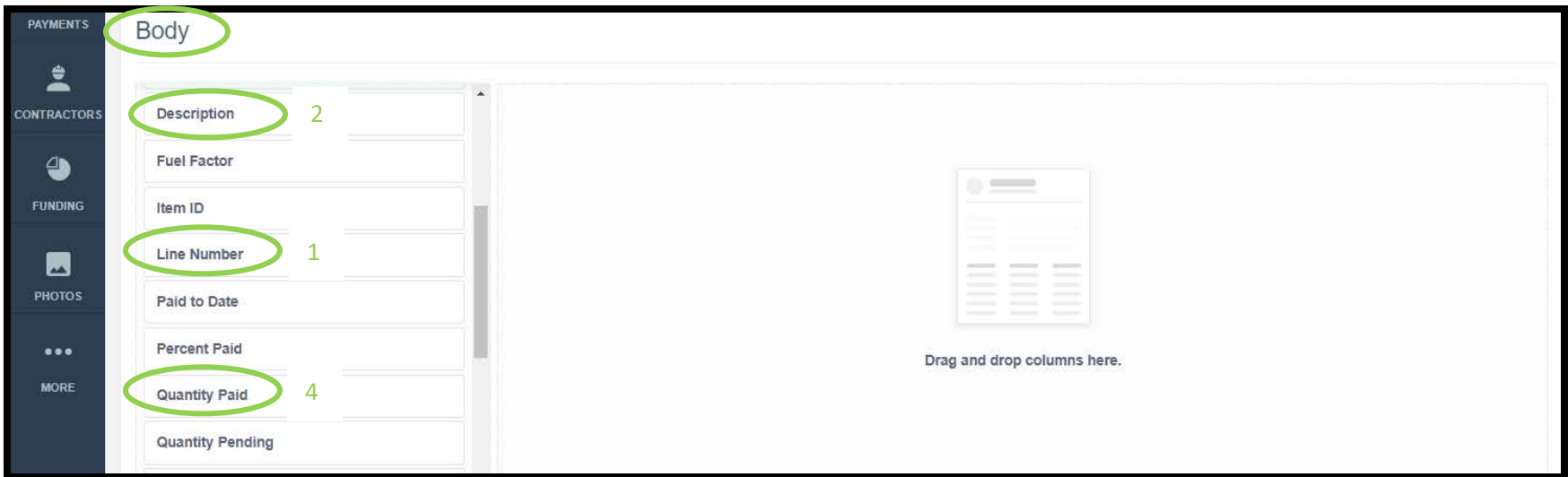
From the “Headers” section, in the order listed here, select “Description” and “Project ID”. Do NOT select any additional Header options. If you do, the Materials101 EZ Form will not read the file correctly.



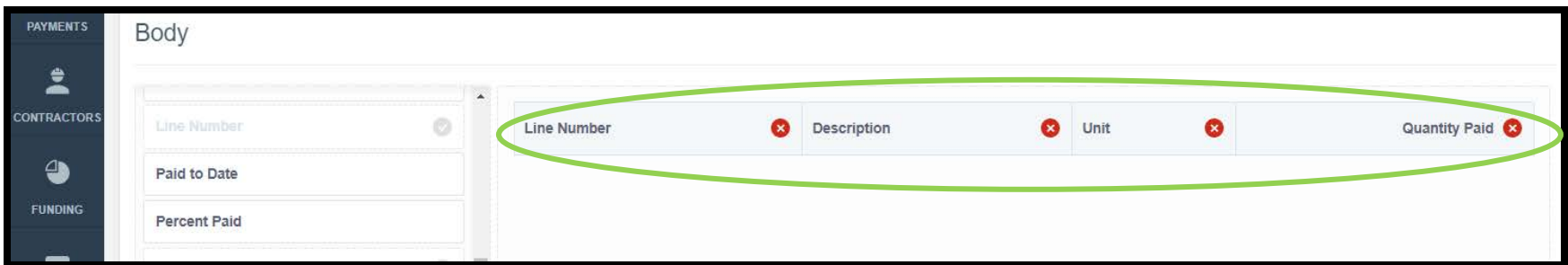
Each of the selections will then appear in the box to the right of the Header selection choices.



From the “Body” section, in the order listed here, select “Line Number”, “Description”, “Unit” and “Quantity Paid”.

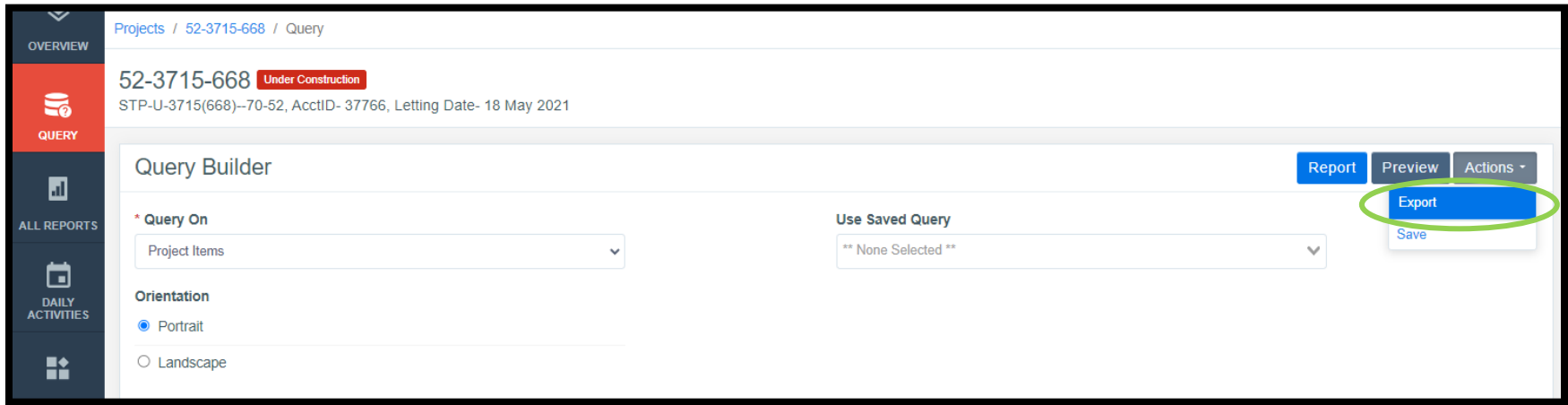


Each of the selections will then appear in the box to the right of the Body selection choices.

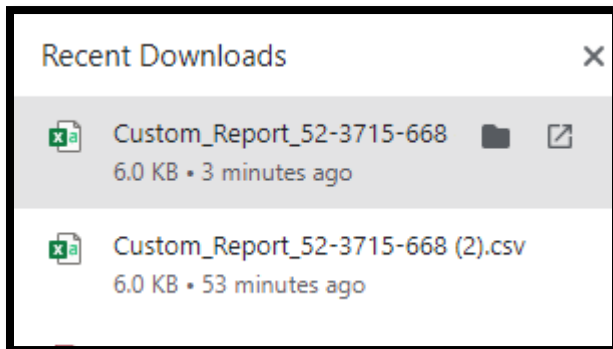


Note: The user can drag and drop the choices in the right windows to re-order them if necessary.

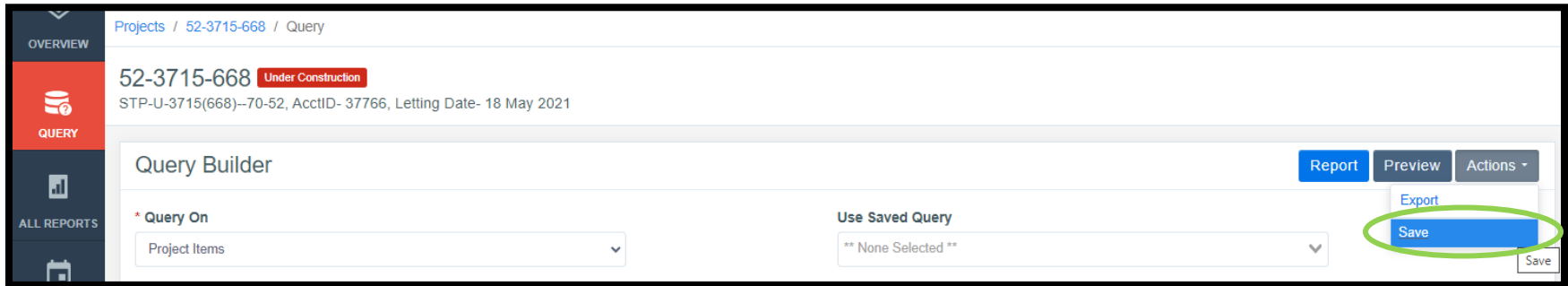
When the selections have been made, in the “Actions” pull-down in the top, right corner of the screen, select “Export”.



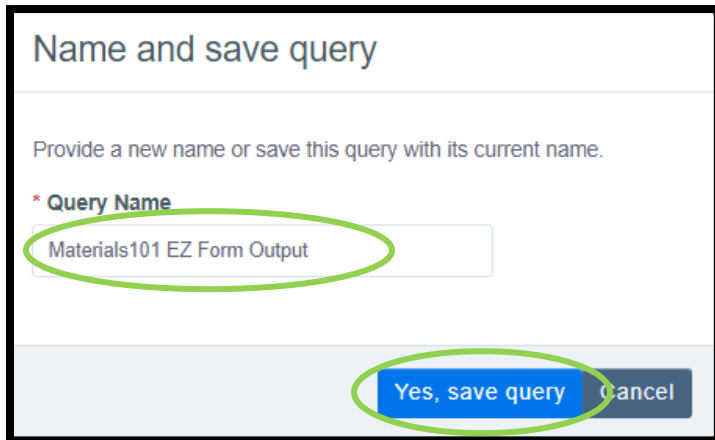
This will produce a .csv file that downloads in your browser. This is the file that will be selected for upload into the Materials101 EZ Form. Save this file to the desired location on your computer, but **do NOT rename this file or change the file extension**. If you rename the file or change the file extension, the Materials101 EZ Form will not work.



When you've completed the selections above, either before or after exporting the file, save the report by selecting "Save" from the "Actions" pull-down in the top, right corner.

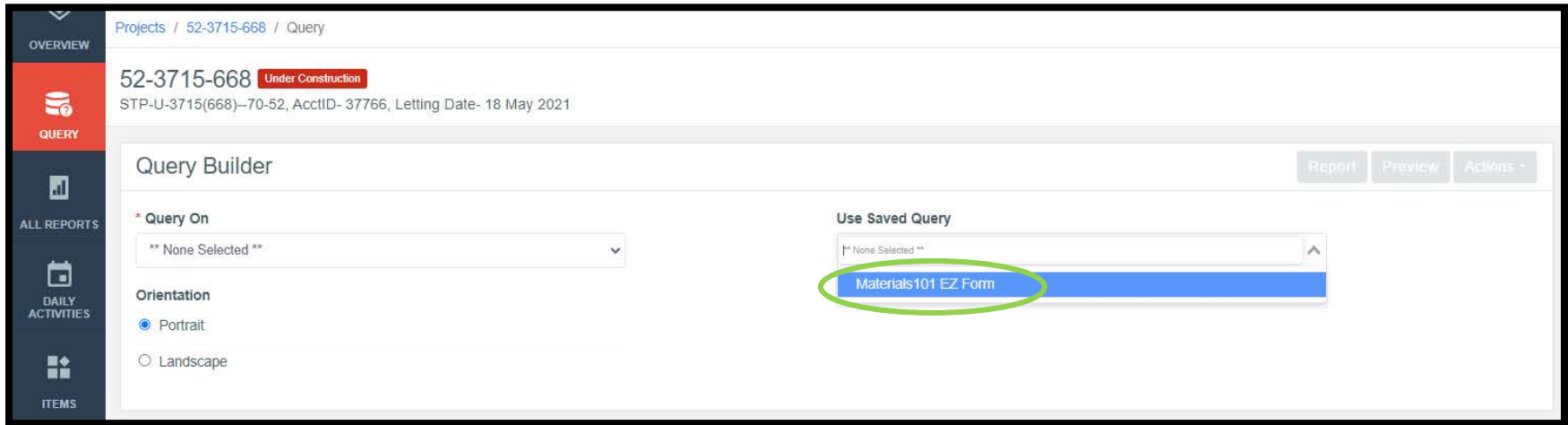


A box will appear that allows you to create a name for the saved query. In the "Query Name" field, enter whatever name is most recognizable for you then click the blue "Yes, save query" button.





Once you've saved the report, you should be able to select it in the "Use Saved Query" pull-down menu the next time you want to run the report. Once a saved report is selected, the saved fields will automatically show, and the export can be run immediately.

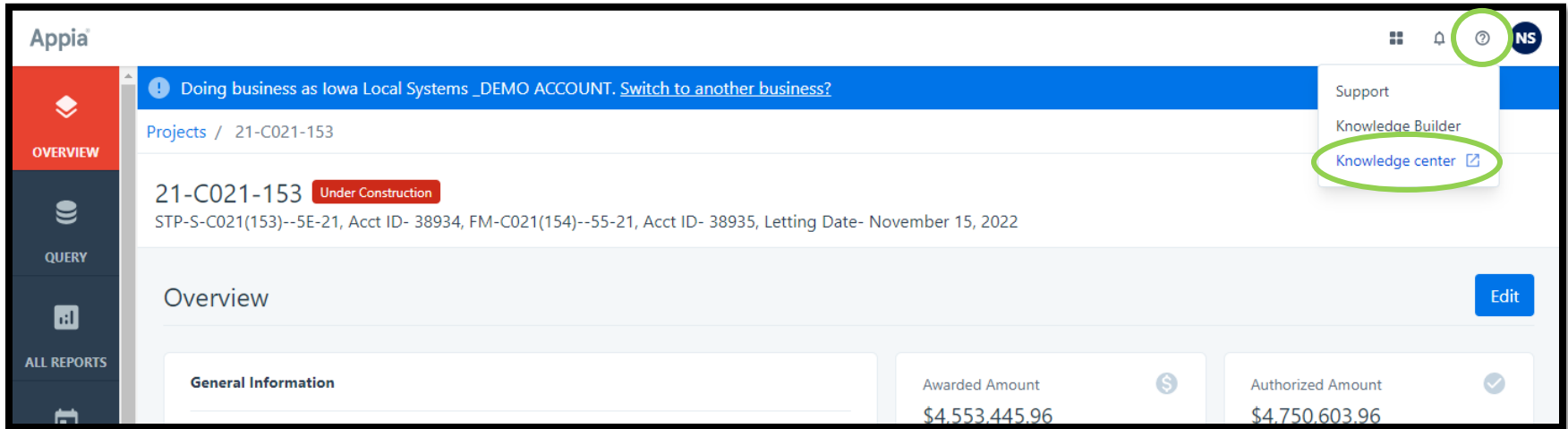


# 20 - Help Section & Local Systems

## 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 navigation bar containing a grid icon, a bell icon, a help icon (a circle with a question mark), and the initials 'NS'. The help icon is circled in green. A dropdown menu is open from this icon, listing three options: 'Support', 'Knowledge Builder', and 'Knowledge center'. The 'Knowledge center' option is also circled in green and includes an external link icon. The main content area shows a project overview for '21-C021-153' with a status of 'Under Construction'. Below this, there is 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.

The screenshot shows the Appia® Knowledge Center interface. At the top left is the 'infotech.' logo followed by 'Knowledge Center'. On the top right, there is a search bar with a magnifying glass icon and the text 'Search', and a 'Contact Support' link. Below the header, the breadcrumb 'Infotech > Appia®' is visible. A left-hand navigation menu lists several categories: 'APPIA®', 'Appia® | Business Setup', 'Appia® | Reference Data', 'Appia® | Projects in New Phase', 'Appia® | Projects Under Construction', 'Appia® | Project Closeout', 'Appia® | Generating Reports and Sharing Data', 'Appia® | Integrations', and 'Training Materials'. The main content area features the 'Appia®' logo in a large blue font, followed by a descriptive paragraph: 'Municipalities and engineering firms nationwide use Appia to streamline construction administration and inspection on federal, state, and locally-funded infrastructure projects. Appia's mix of mobile tools, integrations, and free read-only accounts supports collaboration and compliance on every project.' Below this is a sub-section header 'Appia® | Business Setup' in blue. Underneath are three links: 'Appia® | User roles and permissions' (with a sub-link 'See also: Appia® | Licenses | Add, renew, or assign licenses Intro to Appia® user roles What is a user role...'), 'Appia® | Order licenses as a first-time user' (with a sub-link 'See also: Appia® | Licenses | Add, renew, and manage licenses Appia® | User roles and permissions Are you and yo...'), and 'Appia® | Add, renew, and assign licenses'.

## **Local Systems Contact Information**

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

### **Project set-up & program usage technical assistance**

#### **Niki Stinn**

Title: Secondary Roads Engineer

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

Phone: 515-239-1064

(Messages forwarded. Leave message if unanswered.)

Days: Monday-Friday

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

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

#### **Derek Peck**

Title: e-Construction Administrator

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

Phone: 515-239-1391

(Messages forwarded. Leave message if unanswered.)

Days: Monday-Friday

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