

# 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 "My Account" button takes you to the page where your agency's Infotech account is managed.

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

The screenshot displays the Infotech project management interface. On the left, a dark sidebar contains navigation tabs: 'MY PROJECTS' (highlighted in red), 'REFERENCE DATA', 'SYSTEM MGT', 'EXPORT DATA', and 'HELP'. The main content area is titled 'My Projects' and features a 'Find Project' search bar. A 'Pro tip' box is overlaid on the project list, stating: 'Projects statuses are located here. Click or tap to select a different status than the one showing.' Below this, a 'Status' dropdown menu is set to 'Under Construction'. The project list is filtered to show 'Under Construction' projects. The table below shows the following data:

Project ID	Description
03-C003-062 Imported	03-C003-062
11-C011-071 Imported	STP-S-C011(71)--5E-11 - 2942
36-C036-074 JSON TEST/FINANCE Imported	
BHM-SWAP-1827(684)--SA-82-1 12345	Reconstruction Bridge Deck
BROS-C004(103)--8J-04 - 35155	On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.
BROS-C078(111)--FF-78_Payment for Multiple Sections	Letting Date 4/21/2020
BRS-C036(74)--60-36 - AcctID	Letting Date: 04/01/20
BRS-C036(74)--60-36 - AcctID_02_Central01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017

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. The main content area is titled 'Under Construction' and contains a table of project entries. The table has two columns: 'Project ID' and 'Description'. The project '86-C086-060 - 31961' is highlighted with a green circle. The interface also features a sidebar on the left with navigation icons and buttons at the top right for 'Create Project' and 'Import Project'. A status filter is set to 'Under Construction'.

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 ("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 86-C086-060 - 31961, which is currently 'Under Construction'. The page is organized into several key sections:

- General Info:** Lists project details including the Project Manager (Nicole Stinn), Prime Contractor (PETERSON CONTRACTORS INC.), Work Type (BRIDGE REPLACEMENT - PPCB), and Location (C Avenue Over Wolf Creek, Section 9, T85N, R16W).
- Complete:** Shows progress metrics for 'Awarded' and 'Authorized' work, both currently at 0.000%.
- Financials To Date:** Displays monetary values for 'Amount Paid', 'Liquidated Damages', 'Approved Changes', 'Retainage', and 'Retainage Released', all currently at \$0.00.
- Important Dates:** Key dates include 'Date Created' (09/01/2020) and 'Notice to Proceed' (12/03/2014).
- Project Amounts:** Shows 'Awarded' and 'Authorized' amounts, both at \$1,457,851.99.
- Goals:** A progress indicator for 'DBE' (Disadvantaged Business Enterprise) is shown at 3.087%.



# 3 - Reports

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

The screenshot displays a project overview page for project 86-C086-060 - 31961, which is under construction. The page is divided into several sections: General Info, Complete, Financials To Date, and Important Dates. The General Info section includes details such as Created By (Nicole Stinn), Project Manager (Nicole Stinn), Managing Office (Tama County Highway Department), Prime Contractor (PETERSON CONTRACTORS INC.), Work Type (BRIDGE REPLACEMENT - PPCB), Location (C Avenue Over Wolf Creek, Section 9, T85N, R16W), and Description (Gladbrook Bridge Replacement). The Complete section shows two progress indicators: 0.000% Awarded and 0.000% Authorized. The Financials To Date section lists Amount Paid, Liquidated Damages, Approved Changes, Retainage, and Retainage Released, all with a value of \$0.00. The Important Dates section shows 09/01/2020 and 12/03/2014. The left sidebar contains navigation options: OVERVIEW, LABS, QUERY, ALL REPORTS (highlighted with a red circle), DAILY ACTIVITIES, ITEMS, and MATERIALS.

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](#).
- Posted Quantity – Displays quantities posted in daily reports across a range of dates.
- Materials – Displays all materials that were added to the project.
- Project Status – Displays an overview of the project information.
- 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”.** Updates are currently being programmed to update the Time Limits form so that it more closely mimics the Iowa DOT form. Locals may use the current version of the Appia form in place of the Iowa DOT form 830238, but they MUST 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 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 / 86-C086-060 - 31961 / Reports

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

### 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.

**Posted Quantity**  
Displays quantities posted in daily reports across a range of dates.

#### Materials

**Materials**  
Displays all materials that

[Help](#)

# 4 - 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 shows the Appia project overview page for project 86-C086-060 - 31961, which is under construction. The left sidebar contains navigation options: OVERVIEW, LABS, QUERY, ALIEN REPORTS, DAILY ACTIVITIES (highlighted with a red circle), ITEMS, and MATERIALS. The main content area is titled 'Overview' and includes an 'Edit' button. It is divided into three main sections: General Info, Complete, and Financials To Date.

General Info		Complete		Financials To Date	
<b>Created By</b> Nicole Stinn	<b>Project Manager</b> Nicole Stinn	0.000% Awarded	0.000% Authorized	\$0.00 Amount Paid	\$0.00 Liquidated Damages
<b>Managing Office</b> Tama County Highway Department	<b>Prime Contractor</b> PETERSON CONTRACTORS INC.			\$0.00 Approved Changes	\$0.00 Retainage
<b>Work Type</b> BRIDGE REPLACEMENT - PPCB	<b>Location</b> C Avenue Over Wolf Creek, Section 9, T85N, R16W			\$0.00 Retainage Released	
<b>Description</b> Gladbrook Bridge Replacement	<b>Letting Date:</b> October 21, 2014	<b>Important Dates</b>			

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.

Projects / 86-C086-060 - 31961 / Daily Activities

86-C086-060 - 31961 Under Construction

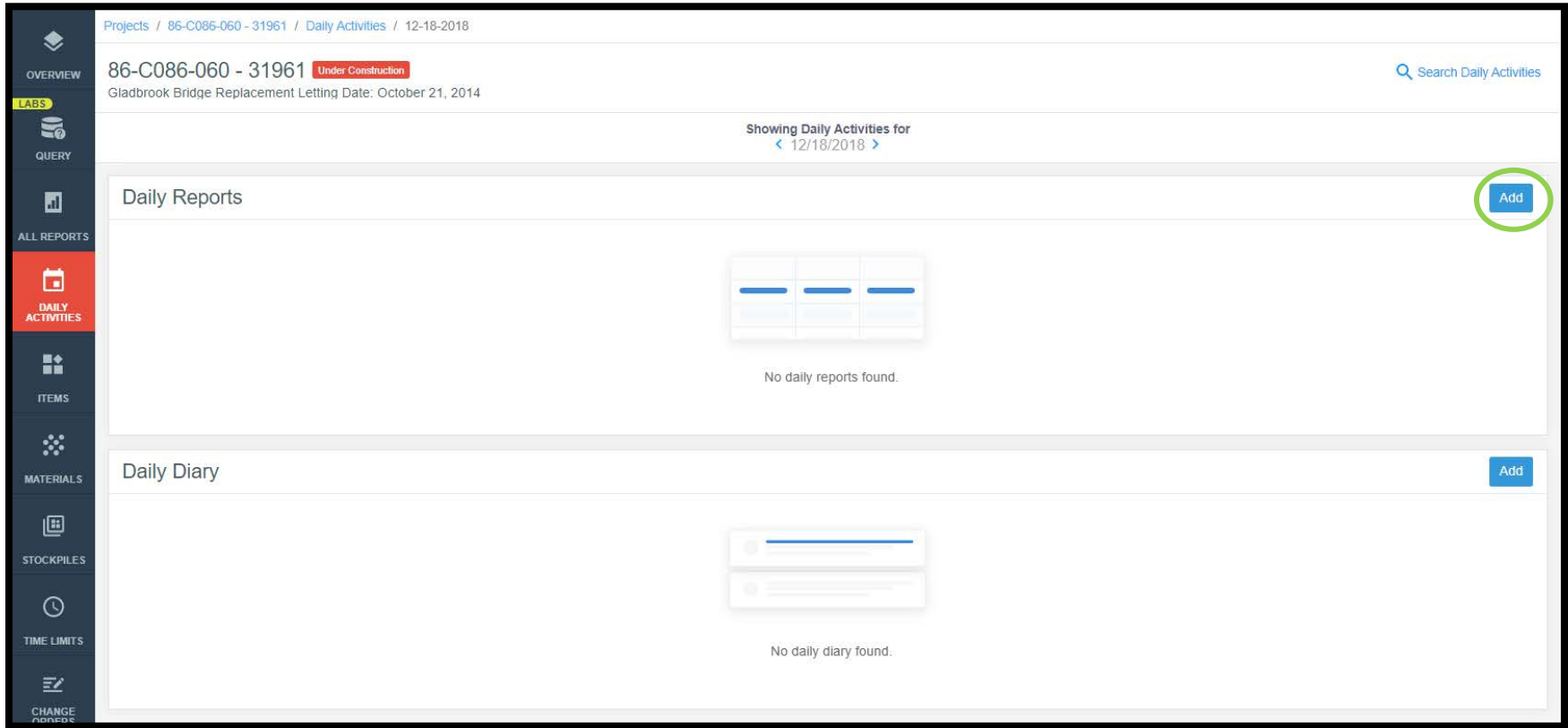
Gladbrook Bridge Replacement Letting Date: October 21, 2014

< December >  
< 2020 >

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 record.



**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 “Setting up Custom Fields” section of the “Appia Project Creation and 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.

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

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

**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**

<b>Low</b>	<b>High</b>
75	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 editing a daily report. 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 letting date "Gladbrook Bridge Replacement Letting Date: October 21, 2014". A horizontal navigation bar contains five tabs: "OVERVIEW", "PERSONNEL", "EQUIPMENT", "ITEM POSTINGS", and "ATTACHMENTS". The "PERSONNEL" tab is highlighted with a green circle. The left sidebar contains various menu items, with "DAILY ACTIVITIES" highlighted in red. The main content area is titled "Edit" and 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". At the bottom, there 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 a "Cancel" button are located in the top right corner of the edit area, and a "Help" button is in the bottom right corner.

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

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

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

[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](#)  
1 No personnel found.

**Equipment** [Edit](#)  
1 No equipment found.

**Item Postings** [Edit](#)  
1 No items found.

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 gray the “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

Worker Crew

Excavation Crew  
Contractor  
PETERSON CONTRACTORS INC.

Number Hours  
3 30.00

Structure Crew  
Contractor  
PETERSON CONTRACTORS INC.

Number Hours  
1 10.00

Equipment Operator  
Number Hours  
2 20.00

Worker Type #3  
Number Hours  
1 10.00

Save Add Crew Add Worker Type Cancel

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**  
Cloudy, Drizzle

**Weather Day?**  
No

**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](#)

Crew Name	Role	Count	Hours
Excavation Crew – PETERSON CONTRACTORS INC.	Laborer	3	30.00 hours
	Equipment Operator	2	20.00 hours
	Worker Type #3	1	10.00 hours
Structure Crew – PETERSON CONTRACTORS INC.	Laborer	1	10.00 hours
	Equipment Operator	1	10.00 hours

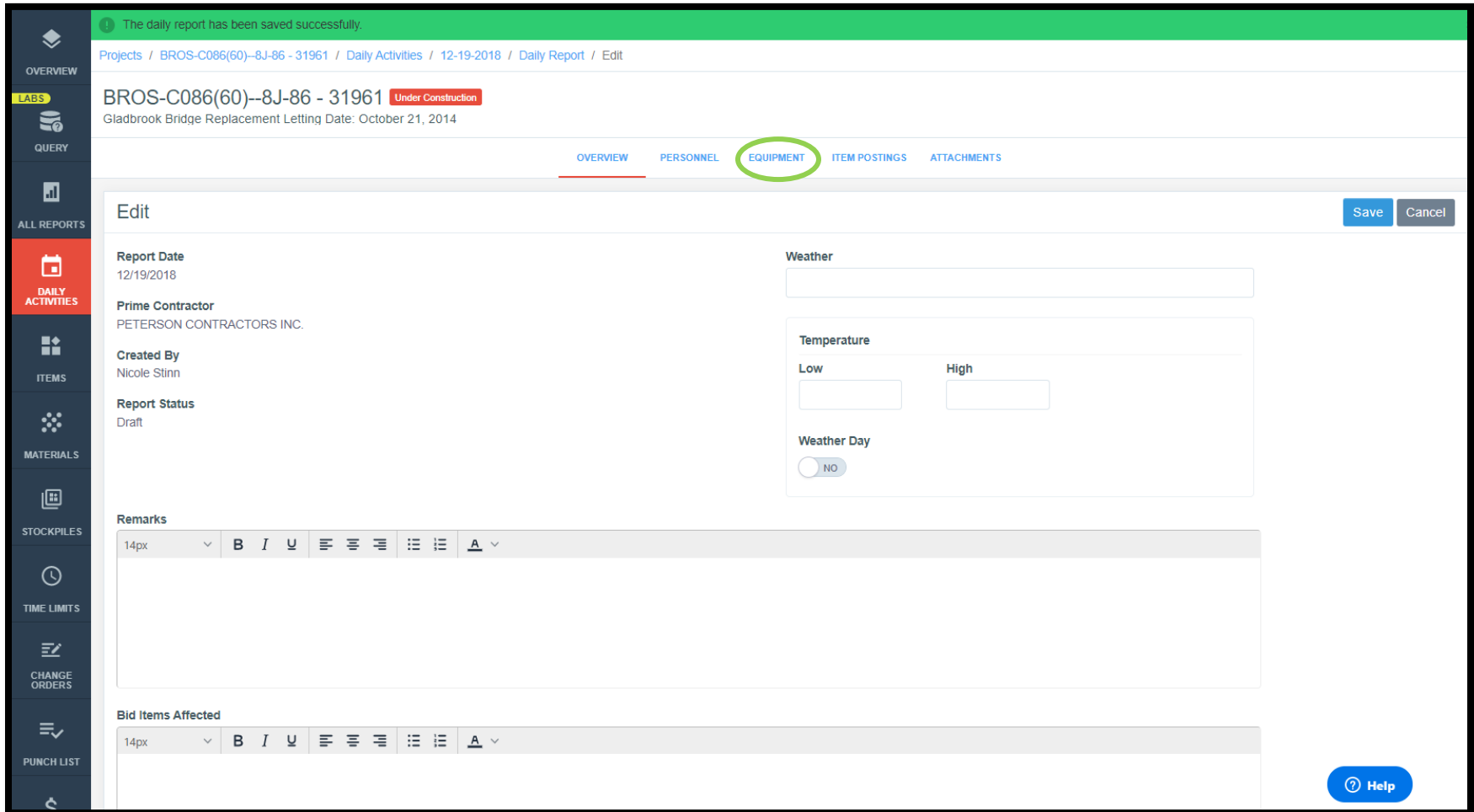
Displaying all 2 crews

### 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

**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

1 No personnel found.

### Equipment Edit

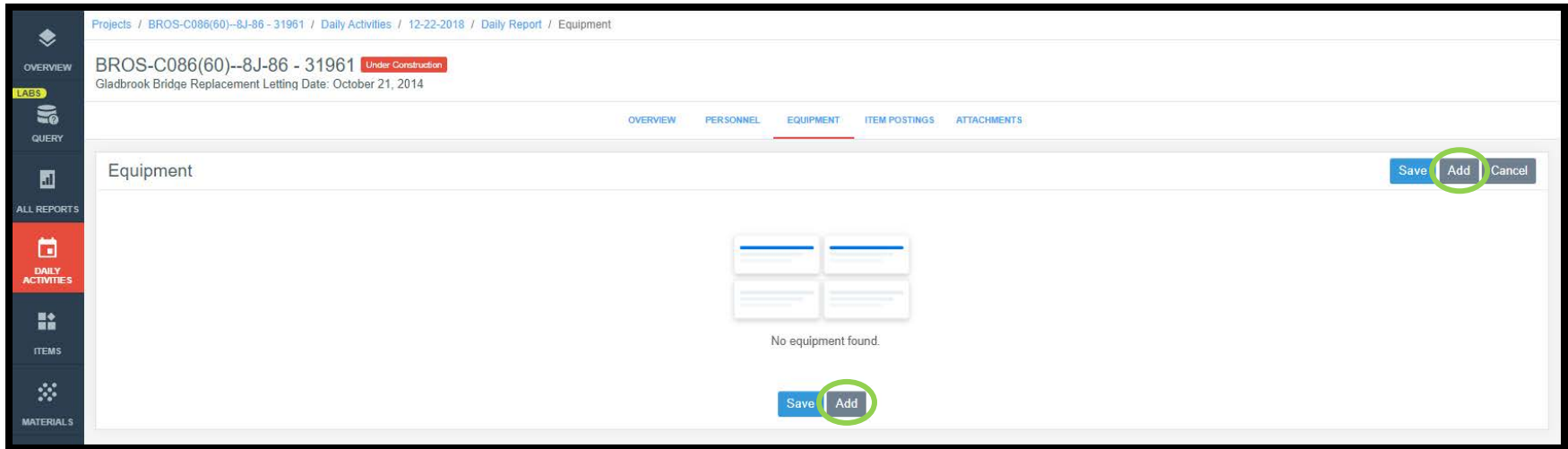
1 No equipment found.

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

Buttons for 'Save' (blue) and 'Add' (gray) are highlighted with green circles at the top right and bottom center of the form area. A 'Cancel' button is also visible at the top right.

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 a daily activity log. 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 shows a text entry at the top, followed by a 'Controlling Item of Work' section with the value 'Clearing and Grubbing'. Below this is a 'Personnel' section with an 'Edit' button, listing two crews: 'Excavation Crew - PETERSON CONTRACTORS INC.' and 'Structure Crew - PETERSON CONTRACTORS INC.', with their respective laborer and equipment operator counts and hours. The 'Equipment' section, highlighted by a green oval, has an 'Edit' button and 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. Below the equipment section are 'Item Postings' and 'Attachments' sections, both showing 'No items found' and 'No attachments found' respectively, each with an 'Edit' button.

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	3	30.00 hours
Equipment Operator	2	20.00 hours
Worker Type #3	1	10.00 hours

Structure Crew – PETERSON CONTRACTORS INC.

Laborer	1	10.00 hours
Equipment Operator	1	10.00 hours

Displaying all 2 crews

**Equipment** Edit

Description	Active	Idle	Comments	Contractor
Bulldozer	1 (8.00 hours)	1 (2.00 hours)	Bulldozer pushing downed trees to pile for disposal.	PETERSON CONTRACTORS INC.
Excavator	1 (8.00 hours)	1 (2.00 hours)	Excavation grabbing downed trees and moving where they can be pushed by bulldozer.	PETERSON CONTRACTORS INC.

Displaying all 2 equipment

**Item Postings** Edit  
No items found.

**Attachments** Edit  
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 "Remarks" section with a rich text editor and a "Bid Items Affected" section are also visible. A left sidebar contains navigation icons for OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS, and DIMCH 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> 12/22/2018	<b>Report Status</b> Draft
<b>Prime Contractor</b> PETERSON CONTRACTORS INC.	<b>Weather Day?</b> No
<b>Weather</b> Cloudy, Drizzle	<b>Temperature</b> Low: 30° High: 39°
<b>Created By</b> Nicole Stinn on 12/09/2020 02:38 PM EST	
<b>Remarks</b> 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> Clearing and Grubbing	

### Personnel Edit

1 No personnel found.

### Equipment Edit

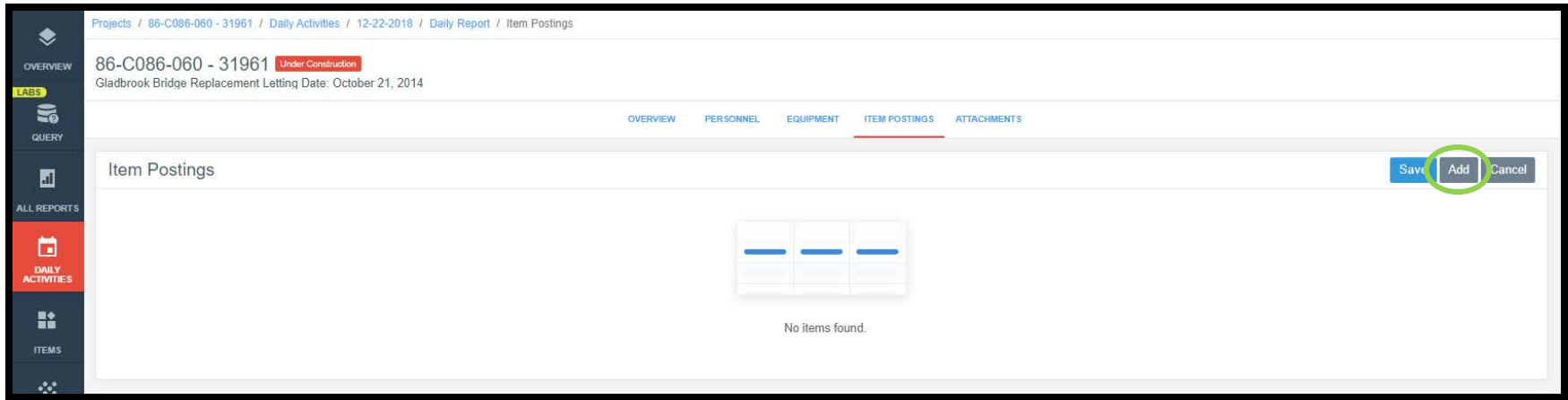
1 No equipment found.

### 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 both the right side and bottom of the screen.



Clicking “Add” will cause a box to pop up containing all of the bid items on the contract. To add an entry for a particular bid item, simply click on the bid 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 amount 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: #28a745; 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;">✕</span>
<span style="background-color: #28a745; 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;">✕</span>
<span style="background-color: #28a745; 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;">✕</span>
<span style="background-color: #28a745; 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;">✕</span>
<b>Section: 2 - ROADWAY ITEMS</b>								
<span style="background-color: #28a745; 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;">✕</span>
<span style="background-color: #28a745; 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;">✕</span>
<span style="background-color: #28a745; 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;">✕</span>
<span style="background-color: #28a745; 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;">✕</span>
<span style="background-color: #28a745; 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;">✕</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 approved status.

The screenshot displays the 'Add Project Items' interface. At the top, there is a search bar with the placeholder text 'Search for Line Number, Item ID, Description and Unit' and a 'Search' button. Below the search bar is a table with the following data:

Item ID	Description	Unit	Quantity	Price	Total	Action
0230	EXCAVATION, CL 10, RDWY+ ROW	CY	24,950.000	0.000	24,950.000	Remove
0240	TOPSOIL, STRIP, SALVAGE+SPREAD	CY	5,920.000	0.000	5,920.000	Remove
0250	MODIFIED SUBBASE	CY	75.000	0.000	75.000	Remove
0260	SHLD CONSTRUCTION, EARTH	STA	14.000	0.000	14.000	Remove
0270	GRANULAR SURFACING ON ROAD, CLASS A CRUSHED STONE	TON	1,200.000	0.000	1,200.000	Remove
0280	EXCAVATION, CL 20, RDWY PIPE CULV	CY	590.000	0.000	590.000	Remove
0290	APRONS, CONCRETE, 36 IN. DIA.	EACH	2.000	0.000	2.000	Remove
0300	CULVERT, CONCRETE ROADWAY PIPE, 36 IN. DIA.	LF	90.000	0.000	90.000	Remove

At the bottom of the table, there are navigation controls: '1', '2', 'Next >', and 'Last »'. Below these controls, it says 'Displaying items 1 - 30 of 60 in total'. At the bottom right, there are two buttons: 'Add Items' and '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.

The screenshot displays the 'Item Postings' interface for project 86-C086-060 - 31961. The page includes a navigation sidebar on the left with options like OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS, and PUNCH LIST. The main content area shows a table of item postings with columns for Authorized Quantity, Pending Quantity, Remaining Quantity, and Quantity Placed. A 'view more' button is highlighted with a green circle for the second item.

Item ID	Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed	Total Placed
0210: 2101-0850001 CLEAR+GRUBB	2.700	0.000	2.700	0.000	0.000
0210: 2101-0850001 CLEAR+GRUBB	2.700	0.000	2.700	0.000	0.000
0190: 2533-4980005 MOBILIZATION	1.000	0.000	1.000	0.000	0.000
0380: 2519-6910000 SAFETY CLOSURE	4.000	0.000	4.000	0.000	0.000



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. A sidebar on the left contains navigation icons for ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS, PUNCH LIST, PAYMENTS, CONTRACTORS, and FUNDING. The main content area shows a list of four items. The second item, '0210: 2101-0850001 CLEAR+GRUBB ACRE', is expanded to show additional data entry fields. A green oval highlights this expanded section, which includes a 'Contractor' dropdown menu (set to 'PETERSON CONTRACTORS INC.'), a 'Remarks' text area (containing 'Trees have been cut down, but stumps remain in place.'), a 'Location' text area (containing 'SW corner of existing bridge'), and 'Station From' and 'Station To' fields with associated numerical inputs and plus signs. The interface also features a top navigation bar with 'Save', 'Add', and 'Cancel' buttons, and a bottom navigation bar with 'Save', 'Add', and 'Help' buttons. The expanded item's data is as follows:

Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed	Total Placed
2.700	0.000	2.700	0.000	0.000

Contractor: PETERSON CONTRACTORS INC.  
Station From: 46 + 05.00  
Station To: 48 + 60.00  
Remarks: Trees have been cut down, but stumps remain in place.  
Location: SW corner of existing bridge

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 label. 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' interface with a sidebar on the left containing navigation options: ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS, and PUNCH LIST. The main area shows two items:

- Item 1:** 0190: 2533-4980005 MOBILIZATION. It shows Authorized Quantity (1.000), Pending Quantity (0.000), Remaining Quantity (0.750), and Quantity Placed (0.250). A green circle highlights the input field for 0.250.
- Item 2:** 0210: 2101-0850001 CLEAR+GRUBB. It shows Authorized Quantity (2.700), Pending Quantity (0.000), and Remaining Quantity (2.700). The Quantity Placed is 0.000, and a blue calculator icon with the text 'Use Worksheet' is circled in green.

Below the second item, there are fields for Contractor (PETERSON CONTRACTORS INC.), Remarks (Trees have been cut down, but stumps remain in place.), and Location (SW corner of existing bridge). Stationing information is also present: Station From (-46 to 05.00) and Station To (-48 to 60.00).

**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 is titled "Area: Acre" and contains a "Preview" button, a "CALCULATED RESULT" of 1.033, 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.

Item ID	Item Name	Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed
0190-2533-4880005	MOBILIZATION	1.000	0.000	0.750	0.250
0210-2101-0850001	CLEAR+GRUBB	2.700	0.000	2.700	
0210-2101-0850001	CLEAR+GRUBB	2.700	0.000	2.700	
0380-2518-0910000	SAFETY CLOSURE				

**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 for four items:

Item ID	Item Name	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

### 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

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](#)

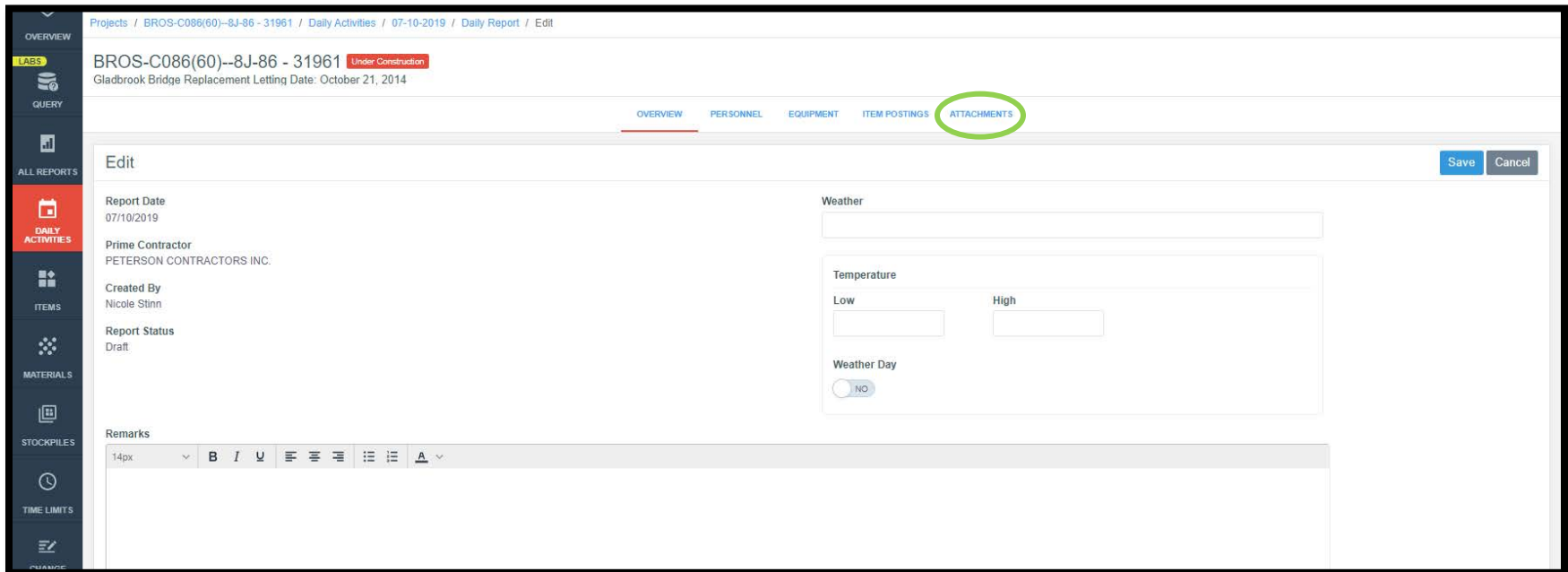
As an alternative to entering test results and other data in the remarks tab, users may use the DOT Excel-based "E-sheets" and upload them as an attachment to the Daily Report.

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

Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 07-09-2019 / 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> 07/09/2019	<b>Report Status</b> Draft
<b>Prime Contractor</b> PETERSON CONTRACTORS INC.	<b>Weather Day?</b> No
<b>Weather</b> Partly Cloudy	<b>Temperature</b> Low: 56° High: 76°
<b>Created By</b> Nicole Stinn on 01/04/2021 04:39 PM EST	
<b>Remarks</b> PCI continues to set decking. They have the pier diaphragm reinforcing steel set out but still have not tied any of it yet. Iowa Bridge and Culvert moved their crane to the site this afternoon.	
<b>Controlling Item of Work</b> Reinforcing Steel	

### Personnel Edit

No personnel found.

### Equipment Edit

No equipment found.

### Item Postings Edit

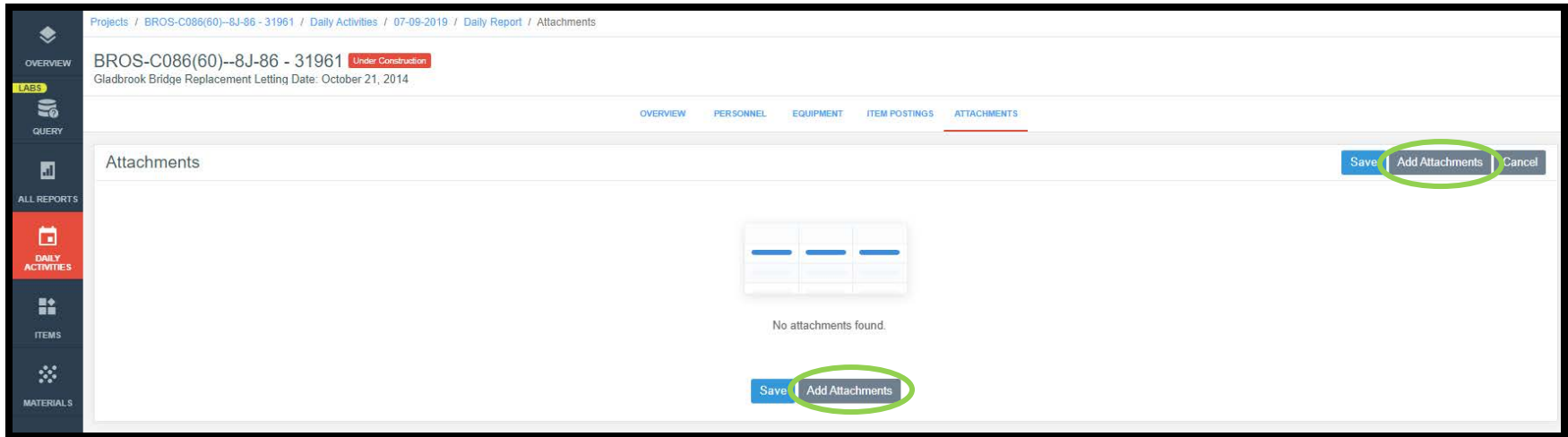
No items found.

### Attachments Edit

No attachments found.

### Audit Log Help

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.



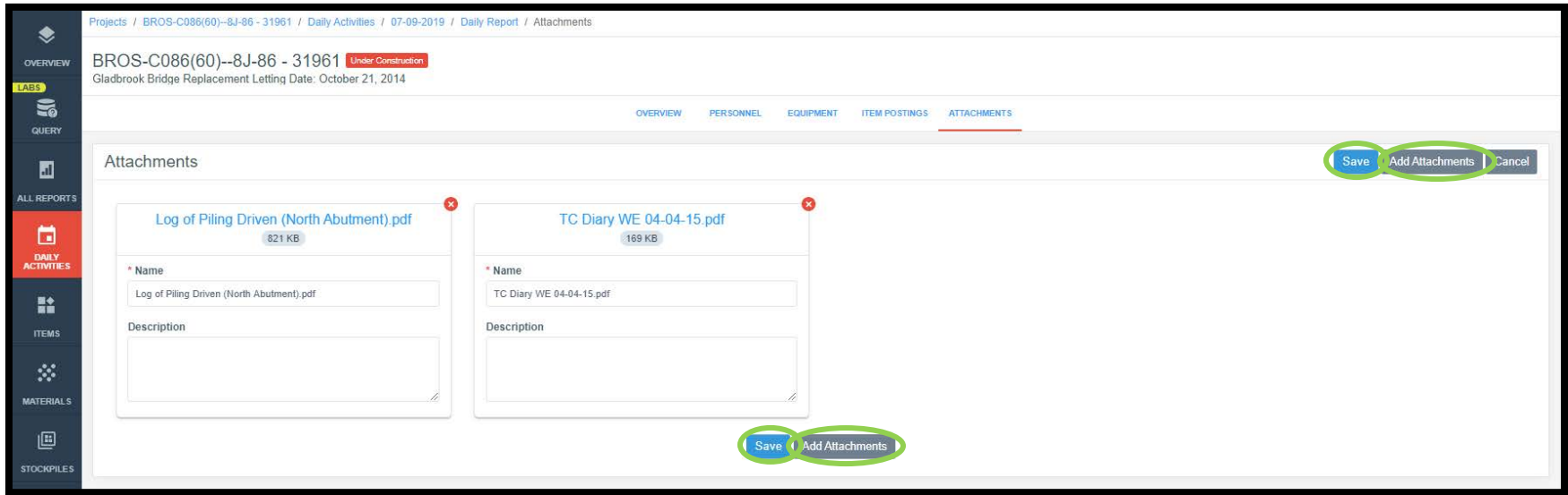
Clicking the “Add Attachments” button will cause the following pop-up box/graphic to appear. To add any desired attachments, either:

- 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 screenshot shows a web application interface for a project. At the top, a green banner displays the message "The item posting has been updated successfully." Below this, the breadcrumb trail reads "Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 02-08-2019 / Daily Report". The main header area includes 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". In the top right corner, there are three buttons: "Submit For Approval" (highlighted with a green circle), "Actions", and "Reports".

The "Daily Report" form contains the following fields:

- Report Date:** 02/08/2019
- Report Status:** Draft
- Prime Contractor:** PETERSON CONTRACTORS INC.
- Weather Day?:** No
- Weather:** Sunny
- Temperature:** Low: 26° High: 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)

At the bottom of the form, there is a "Personnel" section with the message "No personnel found." and an "Edit" button.

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 dialog box contains the text "The daily report has materials to be reviewed" and two buttons: "Review Materials" and "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

For items which have had work completed but for which certifications 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 changed to 0.00. The actual quantity placed that day can be recorded in the remarks for the item (under “shown more”) so as to have a record of it on the day that it occurred. Entering item progress this way when certifications 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 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 non-zero entry for quantity placed, and remarks can be entered to say that certifications 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.

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

## H. Additional “Daily Activities” Information

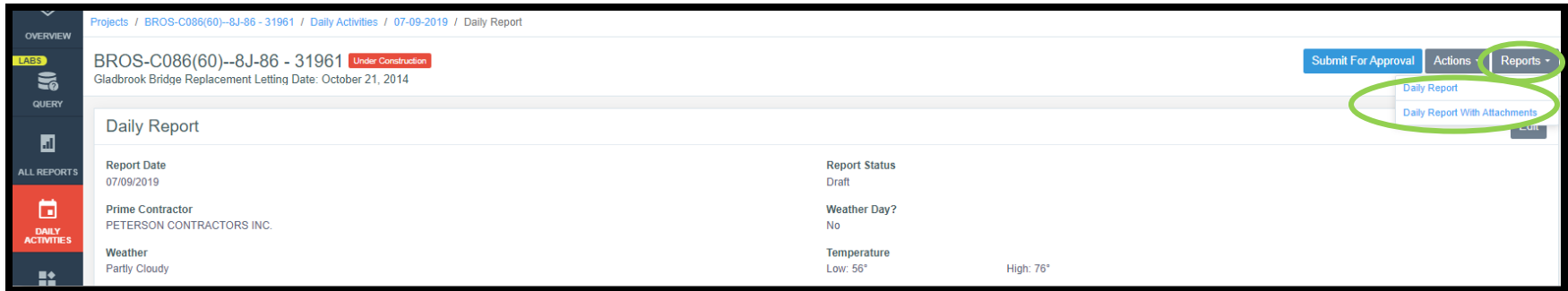
If you close out of a Daily Report or want to make changes to a previously entered report, you can always select the date from the calendar and get back to the report. In order to open the report for editing, just click on the blue circle with the pencil in it on the right side of the line.

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.

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 access type 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**

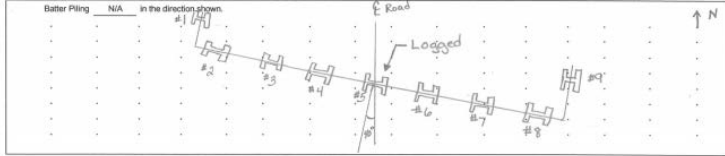
Line Number	Item ID	Unit	Unit Price	Quantity Placed	Posted Amount
<b>Section: 1 - ITEMS FOR A 244'-0 X 30'-0 PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE</b>					
0140	2501-5478073	LF	\$76.100	90.000	\$6,849.00
CONCRETE ENCASEMENT OF STEEL H PILES, HP 14 X 73					
<b>Contractor:</b> PETERSON CONTRACTORS INC.					
<b>Location:</b> South Pier - Piling #s 1-5 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>	



LOG OF PILING DRIVEN BY FORMULA

Project No. BROS-C086(60)-8J-86 Pile (Type and Size) Steel, HP 10 x 57  
 County Tama (Wood, Steel or Concrete)  
 Design No. \_\_\_\_\_ Hammer (Type & Model) Single Acting Diesel (832 DeWag D19-42)  
 Contractor Peterson Contractors, Inc. (Gravity or Diesel manufacturer and model)  
 Iowa DOT Hammer No. \_\_\_\_\_ Foundation Description North Abutment  
 Gross Weight of Hammer \_\_\_\_\_ Effective Wt. \_\_\_\_\_ (North abut. Pier 1, etc.)  
 Weight of Driving Parts 4,015 lbs Station of Foundation C.L. STA 49+97.00  
 Weight of Anvil 753 lbs  
 Weight of Cap 2,000 lbs (Cap + Insert) Cap No. D2015 Formula Used P = 3E(S+0.1) \* W/(W+M)  
 Weight of Pile 3,990 lbs  
 Plan Pile Length 70 ft Plan Driving Resistance 47 tons

Sketch foundation below, number each pile and show steel H-pile orientation as installed. Note battered piles on sketch, and give the amount of batter. Place name and certificate number of welder below if welding was necessary. Forward 2 copies to the Iowa DOT District Office upon completion of each foundation. Note on drawing which pile has been logged.



Pile No.	Date Driven	(1) Plan Length (ft)		(2) Average Penetration Last Blow (inches)		Ram Rise (ft)	Driven Resistance (Tons)	RETAP (3)			PILE EXTENSIONS (4)				Welds (Count)
		Length	Cut-off	Penetration	Last Blow			Date	Ram Rise (ft)	(2) Ave. Penetration Last Blow (inches)	Driven Resistance (Tons)	Length Added (0.0 ft)	Length Cut-off (0.0 ft)	Ram Rise (ft)	
1	06/02/15	70	2.3	0.1875	7	54.73									
2	06/02/15	70	1.9	0.225	7	49.41									
3	06/02/15	70	2.4	0.175	6 1/2	53.41									
4	06/02/15	70	3.0	0.2375	7 1/2	49.96									
5	06/01/15	70	2.0	0.200	7	52.45									
6	06/01/15	70	3.4	0.100	7	73.67									
7	06/01/15	70	2.3	0.150	7	62.93									
8	06/01/15	70	1.4	0.200	7	52.45									
9	06/01/15	70	2.5	0.150	7	62.93									

- Record in the Remarks section below if the pile length is anything other than the plan length at the beginning of drive. Total Welds: 0
- For gravity hammers, enter the penetration in the last 5 blows divided by 5. For steam or diesel hammers, enter the penetration in the last 10 blows divided by 10.
- Indicate date of retap in date column (1 day delay min.). List only pile actually checked.
- Additional pile length to be authorized by the Engineer.

Welders Name: \_\_\_\_\_ Lab No.: \_\_\_\_\_ Exp. Date: \_\_\_\_\_  
 Plan Length: 630 Feet  
 Extensions: 0 Feet  
 Total: 630 Feet  
 Remarks: \_\_\_\_\_  
Norbert Stum 06/02/15 Norbert Stum  
 Inspector Date Project Engineer

Daily Traffic Control Diary

Date: 3/29/2015 Day: Sunday County: TAMA  
 Prime: Peterson Contractors, Inc. Subcontractor: \_\_\_\_\_  
 Project Number: BROS-C086(60)-8J-86 Time Observed: 7:30 AM  
 AM / PM  
 Contractor's Designated Work Shift in Hours: 10 Shift Number: 1  
 1 or 2 or 3  
 TC - Standard or Detail Used: TC-252 Lane: ALL  
 RL / LL  
 Sta. or MP: C AVE 36+00 Sta. or MP: C AVE 61+25 Direction: ALL  
170th ST 100+50 170th ST 204+75 EB - WB - SB - NB

Review of Traffic Control and Traffic Operations:

Circle Which Applies

- All signs & devices installed correctly: (Yes or No or NA)
- All signs & devices in acceptable condition: (Yes or No or NA)
- All signs & devices reflective at night: (Yes or No or NA)
- All warning lights working (day & night): (Yes or No or NA)
- Are arrow displays working / aimed properly: (Yes or No or NA)
- All temporary luminaires working: (Yes or No or NA)

If circled "No" above, who was contacted and what time was correction made?

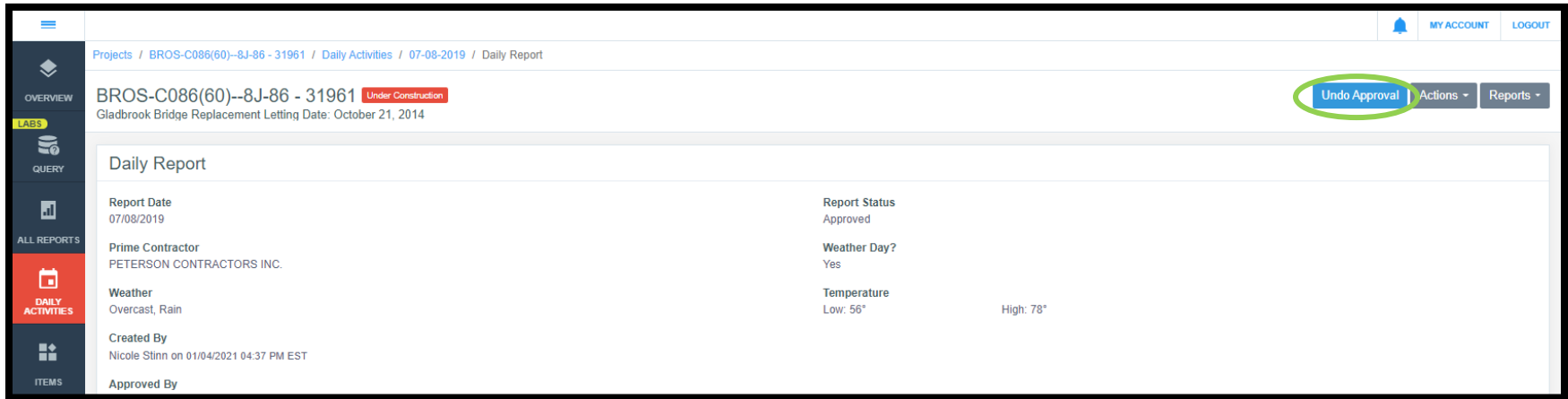
Any changes or modifications to the project's traffic control?

Item:	Flaggers Paid:			Pilot Car Paid:		
	0.5	1.0	Total	0.5	1.0	Total
Individual Names						
Start: - Times -						
Stop: - Times -						
Hrs:						

Contractor's Signature: Norbert Stum Printed Signature: Matt Van Heiden

## 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 access types 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.

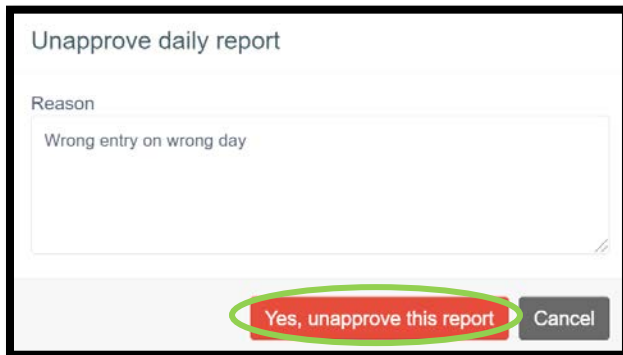


The screenshot shows a web interface for a project named "BROS-C086(60)--8J-86 - 31961" with a status of "Under Construction". The breadcrumb trail is "Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 07-08-2019 / Daily Report". The main content area is titled "Daily Report" and contains the following information:

Report Date	07/08/2019	Report Status	Approved
Prime Contractor	PETERSON CONTRACTORS INC.	Weather Day?	Yes
Weather	Overcast, Rain	Temperature	Low: 56° High: 78°
Created By	Nicole Stinn on 01/04/2021 04:37 PM EST		
Approved By			

In the top right corner of the report details area, there is a blue button labeled "Undo Approval" which is circled in green. To its right are "Actions" and "Reports" dropdown menus.

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.



The screenshot shows a pop-up dialog box titled "Unapprove daily report". It has a "Reason" text area containing the text "Wrong entry on wrong day". At the bottom of the dialog, there are two buttons: a red button labeled "Yes, unapprove this report" which is circled in green, and a grey button labeled "Cancel".

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

# 5 - Items

The Items tab contains a listing of each bid 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.**

Projects / BROS-C086(60)--8J-86 - 31961

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

Gladbrook Bridge Replacement Letting Date: October 21, 2014

Overview Edit

**General Info**

Created By Nicole Stinn	Project Manager Nicole Stinn
Managing Office Tama County Highway Department	Prime Contractor PETERSON CONTRACTORS INC.
Work Type BRIDGE REPLACEMENT - PPCB	Location C Avenue Over Wolf Creek, Section 9, T85N, R16W
Description Gladbrook Bridge Replacement	
Letting Date: October 21, 2014	

**Project Amounts**

<b>\$1,457,851.99</b> Awarded	<b>\$1,457,851.99</b> Authorized
----------------------------------	-------------------------------------

**Complete**

0.000% Awarded	0.000% Authorized
-------------------	----------------------

**Financials To Date**

<b>\$0.00</b> Amount Paid	<b>\$0.00</b> Liquidated Damages
<b>\$0.00</b> Approved Changes	<b>\$0.00</b> Retainage
<b>\$0.00</b> Retainage Released	

**Important Dates**

<b>05/21/2020</b> Date Created	<b>12/03/2014</b> Notice to Proceed
-----------------------------------	--

**Goals**

3.087%  
DBE

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

The screenshot displays a software interface for managing construction items. The main area shows a table of items with columns for Line Number, Item ID, Unit, Original Quantity, Authorized Quantity, Quantity Placed, Unit Price, and Authorized Amount. Each item has a progress bar indicating the percentage of work completed. The 'Quantity Placed' bar is green, and the 'Quantity Paid' bar is grey. The 'ITEMS' tab is selected in the left sidebar.

Line Number	Item ID	Unit	Original Quantity	Authorized Quantity	Quantity Placed	Unit Price	Authorized Amount
0010	2104-2710020	CY	5,700.000	5,700.000	1,066.667	\$4.500	\$25,650.00
EXCAVATION, CL 10, CHANNEL							
Quantity Placed			Quantity Paid				
18.7%			0.0%				
0020	2401-6745625	LS	1.000	1.000	0.000	\$10,700.000	\$10,700.00
RMVL OF EXISTING BRIDGE							
Quantity Placed			Quantity Paid				
0.0%			0.0%				
0030	2401-6745650	LS	1.000	1.000	0.000	\$5,000.000	\$5,000.00
RMVL OF EXIST STRUCT							
Quantity Placed			Quantity Paid				
0.0%			0.0%				
0040	2402-2720000	CY	602.000	602.000	0.000	\$12.150	\$7,314.30
EXCAVATION, CL 20							
Quantity Placed			Quantity Paid				
0.0%			0.0%				
0050	2402-2725005	TON	50.000	50.000	0.000	\$30.000	\$1,500.00
FOUNDATION TREATMENT MATERIAL							
Quantity Placed			Quantity Paid				
0.0%			0.0%				
0060	2403-0100010	CY	386.800	386.800	0.000	\$535.600	\$207,170.08
STRUCTURAL CONCRETE (BRIDGE)							

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 a bid item to a contract.

MOBILIZATION									
Quantity Placed					Quantity Paid				
0200	2536-6745045	LS	1.000		1.000	0.000	\$6,300.000		\$6,300.00
RMVL OF ASBESTOS									
Quantity Placed					Quantity Paid				
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				
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				
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				
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				
0250	2115-0100000	CY	75.000		75.000	0.000	\$60.000		\$4,500.00
MODIFIED SUBBASE									
Quantity Placed					Quantity Paid				
0260	2123-7450000	STA	14.000		14.000	0.000	\$225.000		\$3,150.00

Item history reports.

# 6 - Materials

(Reserved for Future Instructions)



Reserved for future instructions on Materials Tab

# 7 - Stockpiles

(Reserved for future Stockpiles Instructions)

Reserved for future instructions on Stockpiles Tab

# 8 - 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.

Field	Value
Type	Working Days
Status	In Progress
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
Days Remaining	131.5
Original Days Allowed	140.0
Authorized Days Allowed	140.0
Liquidated Damages/Day	\$0.00
Liquidated Damages To Date	\$0.00

General information about time charges are displayed on the Time Limits screen. Informational fields shown include (but are not limited to):

- Description: This will include the late start date and the liquidated damage value.
- Days Charged: This is the number of total working days/calendar days charged to date depending on the contract time limit type.
- Days Remaining: This is the number of working days/calendar days (depends on the contract time limit type) remaining before liquidated damages are applied.
- Original Days Allowed: Days allowed on the original contract.
- Authorized Days Allowed: Days allowed including any extensions of time limits added via change order.
- 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 a bid 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.
- Liquidated Damages to Date: This is the Liquidated Damages/Day value multiplied by the number of days by which the Authorized Days Allowed has been exceeded. This value will be automatically deducted from the “bottom line” of payments due to contractors on payment vouchers.
  - For projects let under Iowa DOT specifications, this field will always show as \$0.00 because we enter a \$0.00 value in the Liquidated Damages/Day field.
  - If the project is let under different specifications, and the user has entered a value for Liquidated Damages/Day, this field will show any accrued damages to date.

## A. Entering Time Charges

In order to edit/enter time charges (working day charges), click on the blue circle icon with the pencil on the right side of the screen.

**Time Limits**

**Primary**

<b>Type</b>	Working Days	<b>Start Date</b>	03/02/2021	<b>Original Days Allowed</b>	140.0	
<b>Status</b>	In Progress	<b>Expected End Date</b>	03/12/2021	<b>Authorized Days Allowed</b>	140.0	
<b>Description</b>	Working Days, Late Start Date 04/01/21, Liquidated Damages \$1,500.00		<b>Days Charged</b>	8.5	<b>Liquidated Damages/Day</b>	\$0.00
		<b>Days Remaining</b>	131.5	<b>Liquidated Damages To Date</b>	\$0.00	

**Completed**

6.1%

Displaying 1 time limit

infotech

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Terms / Privacy / DMCA

Support Hours: 7:00 AM - 8:00 PM Eastern  
Phone: 888.252.2438 / Email: support@appia.net

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

**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	3	4	5	6
		1/2 Day	Full Day	Full Day	Full Day	
7	8	9	10	11	12	13
	Full Day	Full Day	Full Day	Full Day	Full Day	
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 instructions on working through Appia’s final voucher process, see the [Appia’s Final Voucher](#) section of this instructions. For any projects using Iowa DOT specifications and being administered by the DOT, **do NOT complete Appia’s final voucher until the project has been completely closed out and audited by the DOT and retainage has been released.**

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

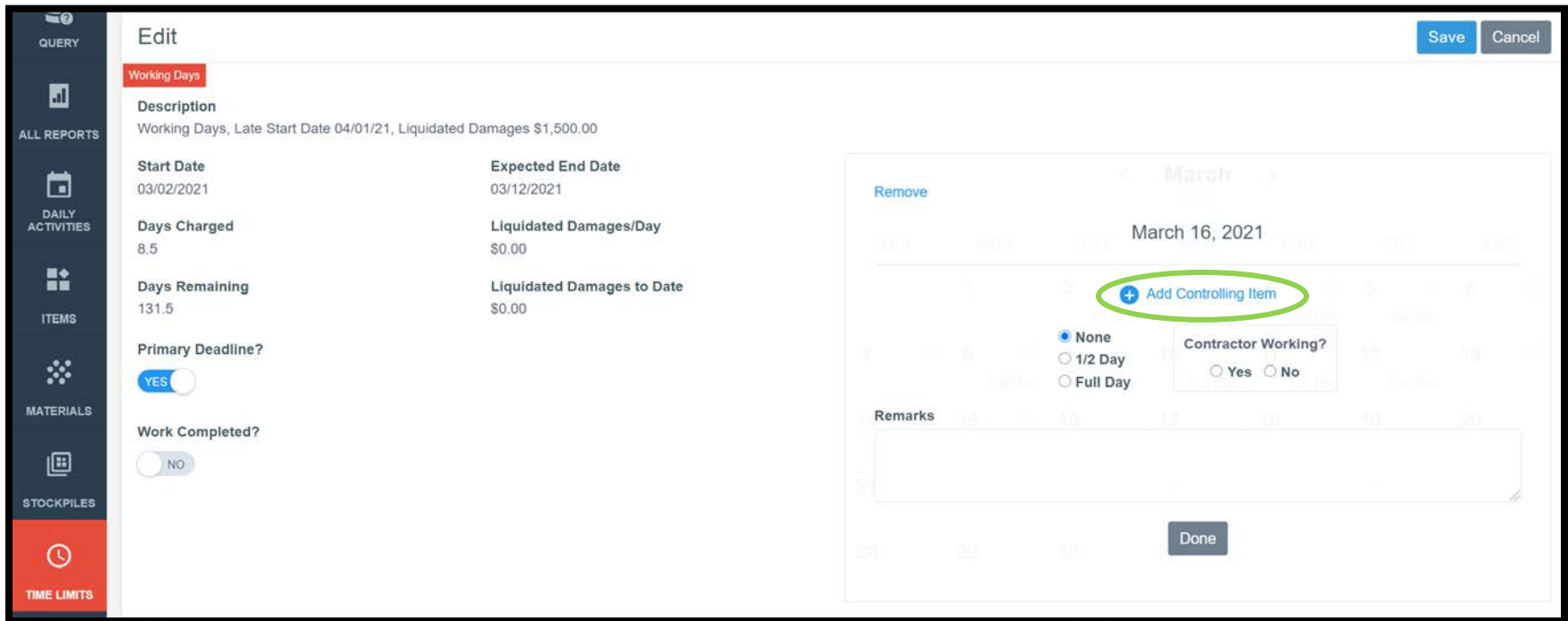
**March 2021**

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2 1/2 Day	3 Full Day	4 Full Day	5 Full Day	6
7	8 Full Day	9 Full Day	10 Full Day	11 Full Day	12 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. 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> 03/02/2021	<b>Expected End Date</b> 03/12/2021
<b>Days Charged</b> 8.5	<b>Liquidated Damages/Day</b> \$0.00
<b>Days Remaining</b> 131.5	<b>Liquidated Damages to Date</b> \$0.00

**Primary Deadline?**  
 YES  NO

**Work Completed?**  
 YES  NO

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

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

**Contractor Working?**  
 Yes  No

**None**  **1/2 Day**  **Full Day**

**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.**

**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 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**

“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

**March 2021**

Remove

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 1/2 Day	3 Full Day	4 Full Day	5 Full Day	6
7	8 Full Day	9 Full Day	10 Full Day	11 Full Day	12 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 an 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

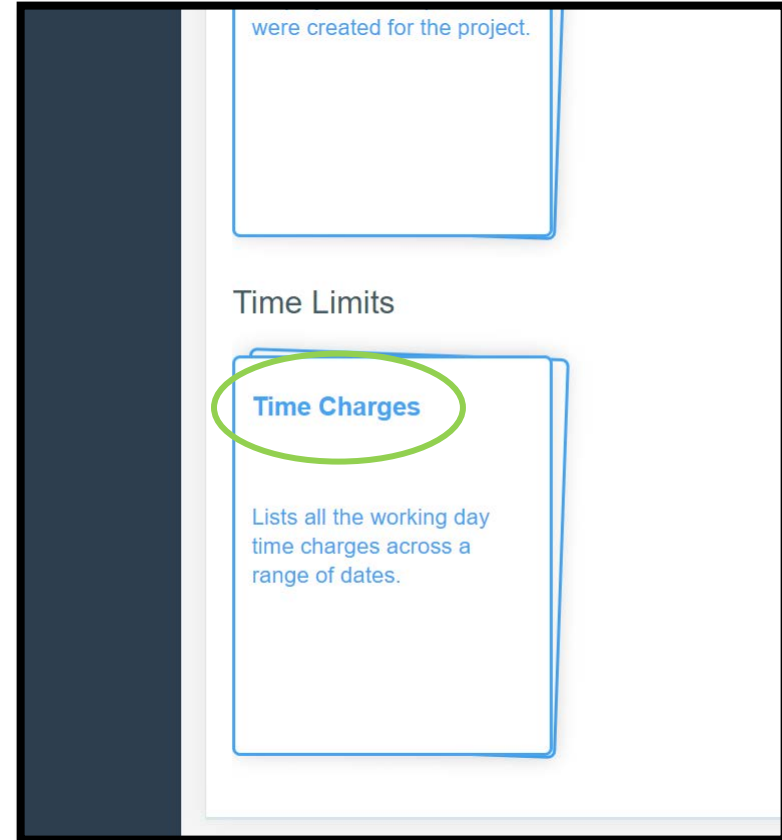
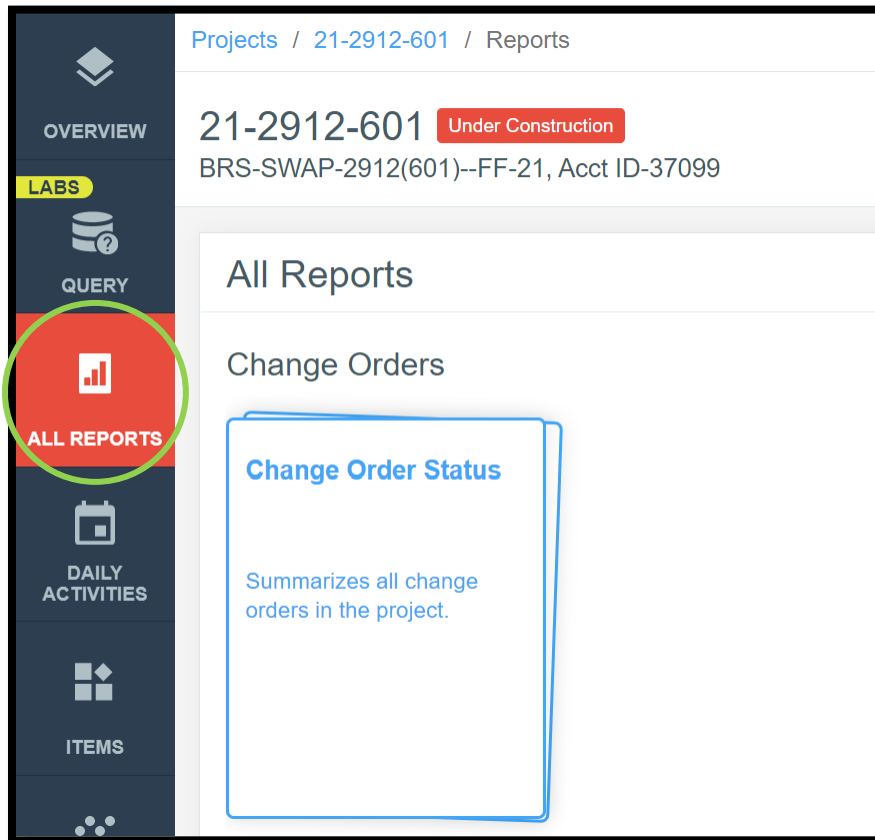
**March 2021**

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2 1/2 Day	3 Full Day	4 Full Day	5 Full Day	6 Full Day
7 Full Day	8 Full Day	9 Full Day	10 Full Day	11 Full Day	12 Full Day	13 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 shown 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 Shown 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' 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 are two radio button options: 'Show Remarks?' (selected 'Yes') and 'Show Contractor Working?' (selected 'Yes').

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' configuration screen with the 'Run Report' button highlighted in blue in the top right corner.

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 number '1 / 2', zoom level '100%', and download/print icons. The main content area displays a report header for 'IOWADOT GETTING YOU THERE' and 'Iowa Local Systems DEMO ACCOUNT Time Charges for Working Days 21-2912-601'. Below the header is a table of project details. On the left side of the browser, there is a sidebar with two thumbnails labeled '1' and '2', representing different views or pages of the report.

<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. 5784 HIGHWAY 175 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

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> 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. 5784 HIGHWAY 175 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: 21-2912-601	04/06/2021 Page 1 of 2
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**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: 21-2912-601	04/06/2021 Page 2 of 2
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# 9 - Change Orders

(Reserved for future Change Orders instructions)

This section is reserved for future instructions on Change Orders.

# 10 - Punch List

(Reserved for Punch List instructions)

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



# 11 - Payments

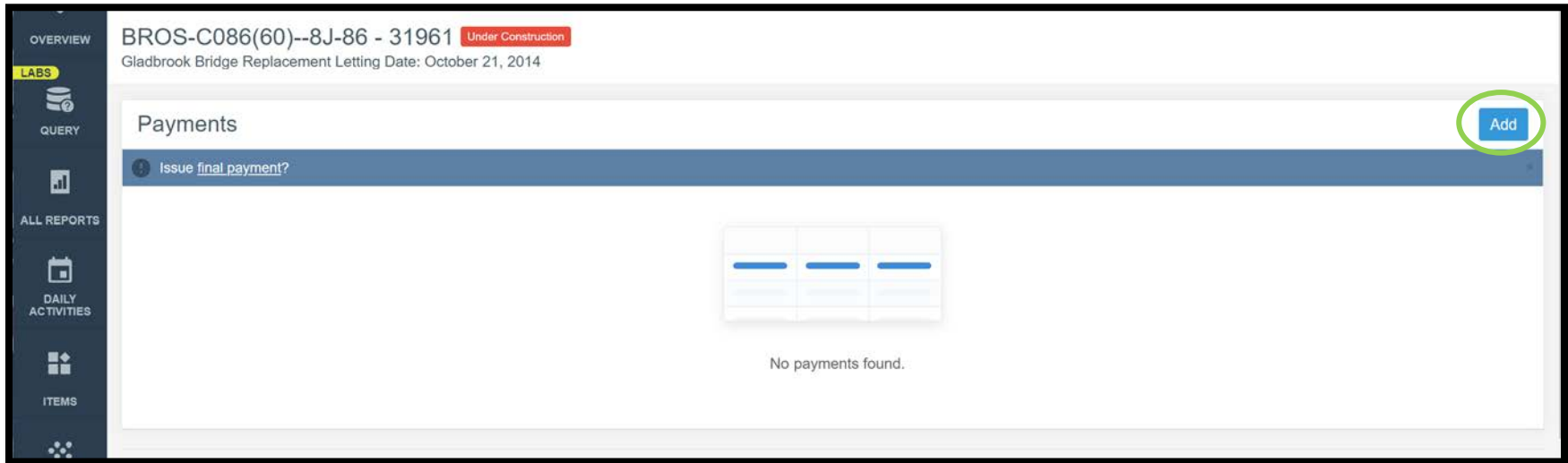
To access the Payments section, click on the Payments button in the left menu.

The screenshot displays a software interface with a dark sidebar on the left containing navigation icons and labels: DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS, and PUNCH LIST. The 'PUNCH LIST' label is highlighted with a red circle, and a red circle with a white dollar sign (\$) is overlaid on the 'PUNCH LIST' icon. The main content area is divided into several sections:

- Project Information:**
  - Created By:** Nicole Stinn
  - Project Manager:** Nicole Stinn
  - Managing Office:** Tama County Highway Department
  - Prime Contractor:** PETERSON CONTRACTORS INC.
  - Work Type:** BRIDGE REPLACEMENT - PPCB
  - Location:** C Avenue Over Wolf Creek, Section 9, T85N, R16W
  - Description:** Gladbrook Bridge Replacement
  - Letting Date:** October 21, 2014
- Financial Summary (Top Right):**
  - Amount Paid:** \$0.00
  - Liquidated Damages:** \$0.00
  - Approved Changes:** \$0.00
  - Retainage:** \$0.00
  - Retainage Released:** \$0.00
- Important Dates:**
  - Date Created:** 05/21/2020
  - Notice to Proceed:** 12/03/2014
- Goals:**
  - DBE:** 3.087%
- Project Amounts (Bottom Right):**
  - Awarded:** \$1,457,851.99
  - Authorized:** \$1,457,851.99

At the bottom of the interface, there are two small line graphs and a blue 'Help' button.

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 four tabs across the top: Overview, Summary, Work Performed, and Attachments. A fifth 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](#) subsection of these instructions.
- Retainage – Retain: **For the first payment on any contract, make sure to enter 3.000% for the retainage amount.** (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: 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.
- 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.

The screenshot shows a software interface for editing a payment record. The interface is divided into several sections:

- Payment Details:** Payment Number 1, Percent Complete 0.5%, Payment Status Draft, Item Payment Amount \$7,565.00.
- Project Details:** Prime Contractor PETERSON CONTRACTORS INC., Project Manager Nicole Stinn, Managing Office Tama County Highway Department.
- Pay Period:** \* From Date 12/03/2014, \* To Date 01/02/2019.
- Payment Dates:** Approval Date, Payment Date.
- Retainage:** Retain 3.000%, Release \$0.00, Retainage Cap Amount \$30,000.00.
- Remarks:** 14px.

The 'Save' button in the top right corner is circled in green. Other fields like 'From Date', 'To Date', 'Approval Date', 'Payment Date', 'Retain', 'Release', and 'Remarks' are also circled in green.

## 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 a project named "BROS-C086(60)--8J-86 - 31961" with a status of "Under Construction". The Gladbrook Bridge Replacement Letting Date is October 21, 2014. The interface includes a navigation menu on the left with options like LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, and CHANGE ORDERS. At the top right, there are buttons for "Submit For Approval" and "Actions". A central navigation bar contains tabs for OVERVIEW, EXCLUSIONS, SUMMARY, WORK PERFORMED, and ATTACHMENTS. A yellow notification banner at the top states: "2 daily reports have been excluded from payment. See the Exclusions section for details." Below this 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" and "Cancel" are located at the top right of the form. A "Help" button is at the bottom right. A link "Edit Payment Cap Settings" is visible at the bottom.

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.

The screenshot displays the 'Excluded Daily Reports' section for project BROS-C086(60)--8J-86 - 31961. The interface includes a sidebar with navigation options: OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES, and ITEMS. The main content area shows a table of excluded reports with columns for Date, Inspector, Status, Remarks, and Posted Amount. Two reports are listed: one from 01/22/2019 and another from 01/28/2019, both in Draft status. The 01/28/2019 report has a posted amount of \$6,849.00. The 'EXCLUSIONS' tab is highlighted in the top navigation bar.

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 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.**

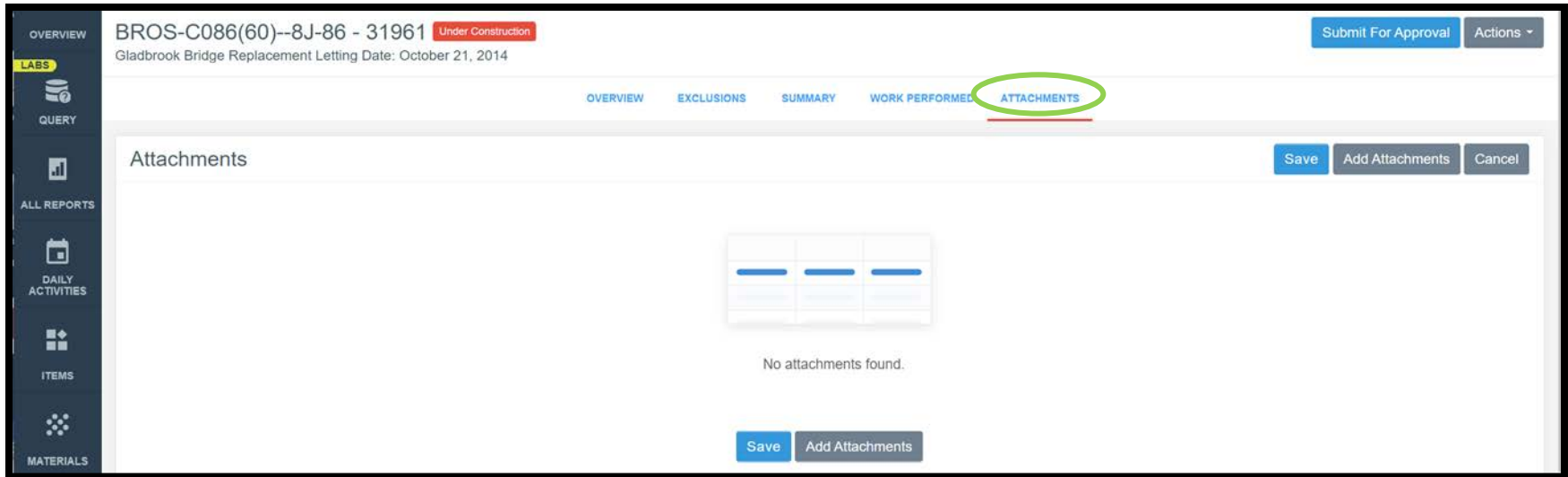
The screenshot shows a software interface for a project named 'BROS-C086(60)--8J-86 - 31961' with a status of 'Under Construction'. The 'Work Performed' tab is selected and circled in green. The table below lists items with their respective values and a red checkmark in the 'Overages' column for item 0140, which is also circled in green.

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							

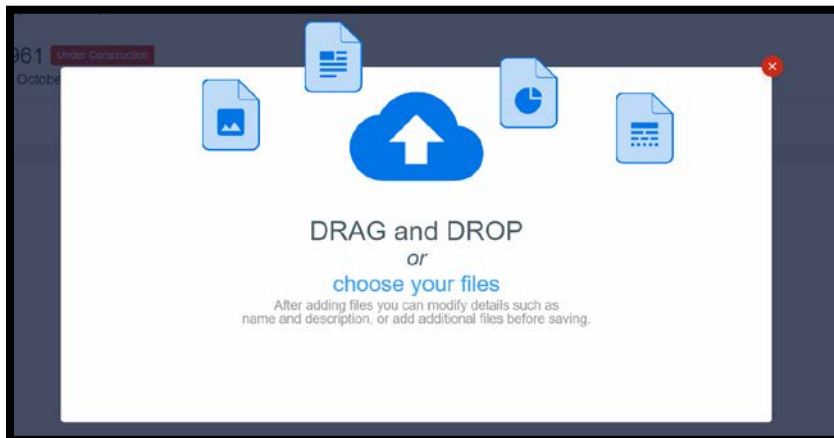
Note: The “Item Overruns” report in the “All Reports” tab may be helpful in identifying items with overages as well.

## E. 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.



## F. Approving a 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, simply click on the blue “Submit for Approval” button in the top, right corner.

The screenshot shows a software interface for a project titled "BROS-C086(60)--8J-86 - 31961" with a status of "Under Construction". The project is for "Gladbrook Bridge Replacement" with a letting date of October 21, 2014. A blue "Submit For Approval" button is highlighted with a green circle in the top right corner. The main content area displays a "Work Performed" table with columns for Line Number, Item ID, Unit, Authorized, Previous, Current, Overages, and Insufficient. The table is divided into two sections: "Section: 1 - ITEMS FOR A 244'-0 X 30'-0 PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE" and "Section: 2 - ROADWAY ITEMS".

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							

After the payment has been “Submitted for Approval”, 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.

The screenshot displays a software interface for project management. At the top, the project ID is 'BROS-C086(60)--8J-86 - 31961' with a red 'Under Construction' tag. Below it, the project name is 'Gladbrook Bridge Replacement' and the letting date is 'October 21, 2014'. 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' (selected), 'EXCLUSIONS', '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 Details	
Payment Number	Percent Complete
2	5.1%
Payment Status	Item Payment Amount
Pending	\$67,438.40

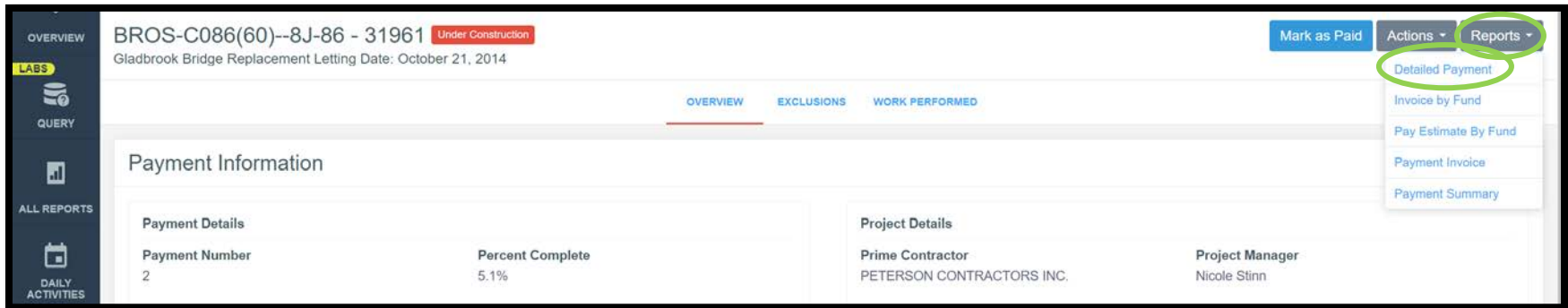
The 'Project Details' column contains the following information:

- Prime Contractor:** PETERSON CONTRACTORS INC.
- Project Manager:** Nicole Stinn
- Managing Office:** Tama County Highway Department

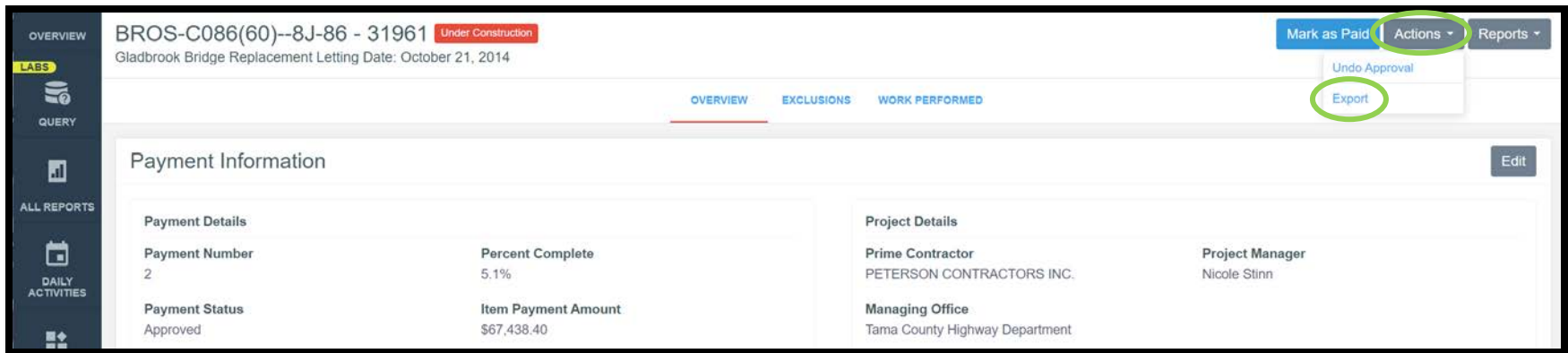
A sidebar on the left contains navigation options: LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES, and ITEMS.

### G. 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 if Appia payment vouchers are being used in lieu of Farm-to-Market (309) vouchers, the “Detailed Payment” voucher should be chosen. Any voucher chosen can be downloaded and saved and then uploaded to Doc Express.



Additionally, a .csv payment report can be exported by choosing the “Actions” pull-down in the top, right corner and selecting “Export”.



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

04/06/2021  
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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  
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Note: A "Stockpiles" section will be shown on this final page as well if any stockpile entries have been made.

## H. 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 date is entered, they cannot be un-approved or edited.**

A payment can be deleted by clicking on the circle with the red "x" on the right side of the line.

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

## I. 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. Appia has its own final voucher process which includes the mandatory process of creating a balancing change order. A balancing change order changes contract quantities to match paid quantities. Appia's final voucher process is initiated by following the link on the Payments tab that says, "Issue final payment" (as shown below). **At this time, Appia's final voucher process does not currently align with Iowa DOT practices. Therefore, Appia's final voucher process should NOT be used to generate final payment vouchers for DOT-administered projects.**

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	5.1%	2
01/02/2019	Approved	\$7,338.05	\$7,338.05	0.5%	1

Displaying all 2 payments

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Do not use this UNTIL your project has been completely closed with the DOT and retainage has been released.

Instead of using Appia's final payment, for DOT-administered projects, you will use Appia to create a standard voucher instead which contains any final quantities as well as the retainage release.

Then, after acknowledgement by the DOT that the project has been closed and retainage has been paid, Appia's final payment process can be followed through. Note: The only way to move a project to "completed" status is to follow through Appia's final payment process.

## 1) DOT Final Voucher Process

To create a final payment voucher for DOT-administered projects, 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.)

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". (The Retainage % does 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.
- 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.

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.

See screenshot on the next page.

**Edit** Save Cancel

**Payment Details**

Payment Number	3	Percent Complete	5.1%
Payment Status	Draft	Item Payment Amount	\$0.00

**Project Details**

Prime Contractor	PETERSON CONTRACTORS INC.	Project Manager	Nicole Stinn
Managing Office	Tama County Highway Department		

**Pay Period**

* From Date	01/29/2019	* To Date	01/31/2019
-------------	------------	-----------	------------

**Payment Dates**

Approval Date		Payment Date	
---------------	--	--------------	--

**Retainage**

Retain	3.000%	Retainage Cap Amount	\$30,000.00
Release	\$28,572.68	<a href="#">Edit Project Cap Settings</a>	

**Remarks**

14px **B** *I* U **≡** **≡** **≡** **≡** **≡** **A** **▼**

FINAL VOUCHER

Help

AFTER the Local Systems (or another DOT administering bureau) has verified that the project is complete and the final payment generated above has been processed, then you may begin Appia’s final payment process.

Note: Many cities require a balancing change order and will want to use Appia’s final payment process in conjunction with the DOT’s close-out process. Please contact your Local Systems Regional Field Engineer to make sure it’s ok to do so.

## 2) Appia's Final Voucher (Payment) Process

\*\*Read the preceding [DOT Final Voucher Process](#) section before going through Appia's final payment process.\*\*

AFTER the Local Systems (or another DOT administering bureau) has verified that the project is complete and the final payment generated above has been processed, then you may begin Appia's final payment process. To begin the process, click on the "Issue final payment" link on the Payments screen.

The screenshot displays the Appia interface for a project under construction. The main heading is "Payments" with an "Add" button. Below this is a table of payments. A button labeled "Issue final payment?" is circled in green. The table contains two rows of payment 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

Displaying all 2 payments

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\*\*\*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.

The screenshot shows a software interface for 'Page County Test' with a red 'Under Construction' tag. The main area is titled 'Final Payment' and includes a document icon with a dollar sign and the text 'Final payment cannot be made until...'. To the right is a checklist of requirements:

- 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?](#)

A 'Create Final Payment' button is located at the bottom right of the checklist area.

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.

25-C025-118 Under Construction  
FM-C025(118)--55-25: Acct ID 37059, Letting Date: August 18, 2020

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	2121-7425020	TON	GRANULAR SHOULDERS, TYPE B	No
<input checked="" type="checkbox"/> 0020	2210-0475105	TON	CHOKER 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

Save Balance Items



A screen like this should appear. 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. (Note: If you click back out to the Change Orders tab before clicking the “Submit for Approval” button, it will show a balancing change order in draft status.)

**25-C025-118** Under Construction  
 FM-C025(118)--55-25: Acct ID 37059, Letting Date: August 18, 2020

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

**Change Order** Edit

**Date Created**  
04/07/2021

**Status**  
Draft

**Summary**  
Balancing Change Order for Final Payment

**Type**

**Description**  
Balancing Change Order for Final Payment

**Total Proposed Amount**  
-\$735,130.77

**Quantity Changes** Edit

Line Number	Item ID	Unit	Quantity Before	Quantity Change	Quantity After	Unit Price	Extension Change
<b>Section: 0001 - Roadway Items</b>							
0010	2121-7425020	TON	2,938.300	-2,938.300	0.000	\$24.500	-\$71,988.35
GRANULAR SHOULDERS, TYPE B							
<b>Reason:</b> Balancing Change Order							
		CAT 01 CAT 01	2,938.300	-2,938.300	0.000	\$24.500	-\$71,988.35
0020	2210-0475105	TON	2,030.900	-2,005.170	25.730	\$28.350	-\$56,846.57
CHOKE STONE BASE							
<b>Reason:</b> Balancing Change Order							
		CAT 01 CAT 01	2,030.900	-2,005.170	25.730	\$28.350	-\$56,846.57
0030	2210-0475290	TON	4,714.700	-4,406.790	307.910	\$28.700	-\$126,474.87
MACADAM STONE BASE							
<b>Reason:</b> Balancing Change Order							

[Help](#)

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 the 'Change Orders' section of a software interface. On the left is a vertical sidebar with various menu items: QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, and TIME LIMITS. The 'CHANGE ORDERS' item at the bottom is highlighted with a red circle. The main content area is titled 'Change Orders' and features a table with the following data:

Date	Status	Amount	Type	Summary	No.
04/07/2021	Draft	-\$735,130.77		Balancing Change Order for Final Payment	1

Below the table, it states 'Displaying 1 change order'. The interface also includes the 'infotech' logo, a support information box with contact details, and a footer with copyright information and links to Terms, Privacy, and DMCA.

After clicking “Submit for Approval”, an “Approve” button will show if you have an appropriate role type which can administer approvals. Click “Approve”.

The screenshot displays a software interface for managing change orders. At the top, the contract number is 25-C025-118, marked as 'Under Construction'. A navigation sidebar on the left includes options like OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, and TIME LIMITS. The main content area shows a 'Change Order' summary with the following details:

- Date Created:** 04/07/2021
- Status:** Pending
- Summary:** Balancing Change Order for Final Payment
- Description:** Balancing Change Order for Final Payment
- Type:** (blank)
- Total Pending Amount:** -\$735,130.77

Below the summary is a 'Quantity Changes' table with the following columns: Line Number, Item ID, Unit, Quantity Before, Quantity Change, Quantity After, Unit Price, and Extension Change. The table lists three items under the section '0001 - Roadway Items':

Line Number	Item ID	Unit	Quantity Before	Quantity Change	Quantity After	Unit Price	Extension Change
0010	2121-7425020	TON	2,938.300	-2,938.300	0.000	\$24.500	-\$71,988.35
GRANULAR SHOULDERS, TYPE B Reason: Balancing Change Order							
		CAT 01 CAT 01	2,938.300	-2,938.300	0.000	\$24.500	-\$71,988.35
0020	2210-0475105	TON	2,030.900	-2,005.170	25.730	\$28.350	-\$56,846.57
CHOKE STONE BASE Reason: Balancing Change Order							

\*\*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 application. The breadcrumb trail at the top reads 'Projects / BROS-C086(60)--8J-86 - 31961 / Payments'. The project name 'BROS-C086(60)--8J-86 - 31961' is followed by a red 'Under Construction' tag. Below this, it states 'Gladbrook Bridge Replacement Letting Date: October 21, 2014'. The main heading is 'Payments', with an 'Add' button to its right. A blue button labeled 'Issue final payment?' is circled in green. Below this 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, it says 'Displaying all 2 payments'. The footer includes the 'infotech' logo and the text 'Copyright © 2021, Infotech®. All rights reserved.'

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 displays a software interface for a 'Final Payment' process. On the left is a dark sidebar with navigation options: OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, and MATERIALS. The main header shows '25-C025-118' with a red 'Under Construction' tag and 'FM-C025(118)-55-25: Acct ID 37059, Letting Date: August 18, 2020'. The central area features a document icon with a dollar sign and the text 'Final Payment' and 'Final payment cannot be made until...'. On the right, a checklist shows the following items:

- ❗ All items are balanced. Items must be balanced to ensure correct payment adjustments. [Balance items?](#)
- ✅ All items are completed. Done. (This item is circled in green)
- ✅ 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?](#)

A 'Create Final Payment' button is located at the bottom right of the checklist area.

If it didn't, 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	CHOKER 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 circle with the pencil in the upper, right corner to edit the time limits data.

**Time Limits**

**Primary**

<b>Type</b> Working Days	<b>Start Date</b> 09/11/2020	<b>Original Days Allowed</b> 25.0
<b>Status</b> In Progress	<b>Expected End Date</b> 09/14/2020	<b>Authorized Days Allowed</b> 25.0
<b>Description</b> Working Days, Late Start Date: 09/21/20, Liquidated Damages: \$1,000.00	<b>Days Charged</b> 1.5	<b>Liquidated Damages/Day</b> \$0.00
	<b>Days Remaining</b> 23.5	<b>Liquidated Damages To Date</b> \$0.00

**Completed**

6.0%

Displaying 1 time limit

**infotech**

Support Hours: 7:00 AM - 8:00 PM Eastern  
Phone: 888 352 2439 / Email: [support@appla.net](mailto:support@appla.net)

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[Terms](#) / [Privacy](#) / [DMCA](#)



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.

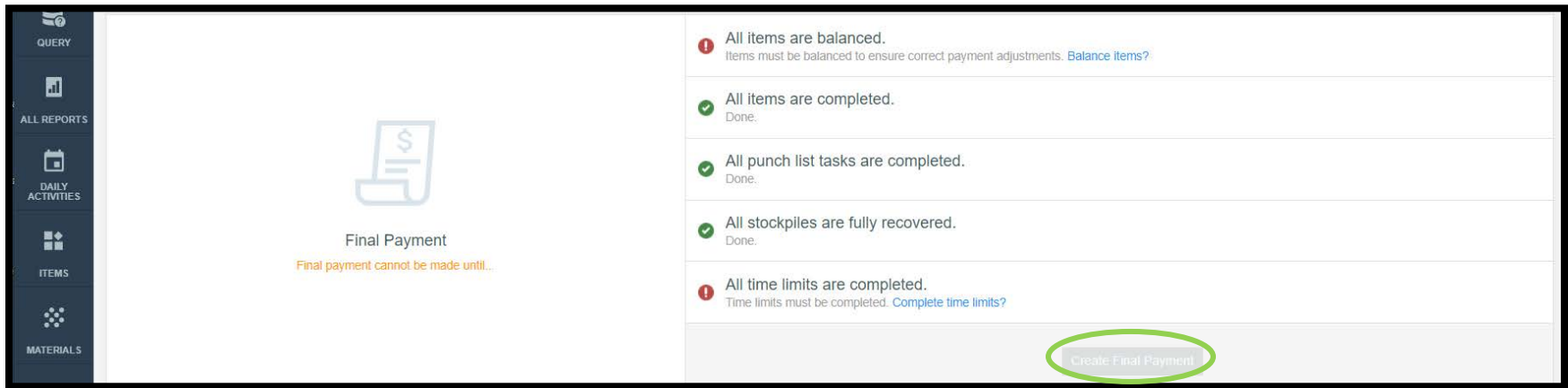
The screenshot shows an 'Edit' screen for 'Working Days'. The left sidebar contains navigation options: QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, and TIME LIMITS. The main content area includes a 'Working Days' header, a description, and several data fields:

- 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 (toggle)
- Work Completed?** YES (toggle, circled in green)

On the right side, there is a calendar for April 2021. The date 7th is highlighted in red, and the date 14th is highlighted in yellow. The 'Save' button in the top right corner is circled in green.

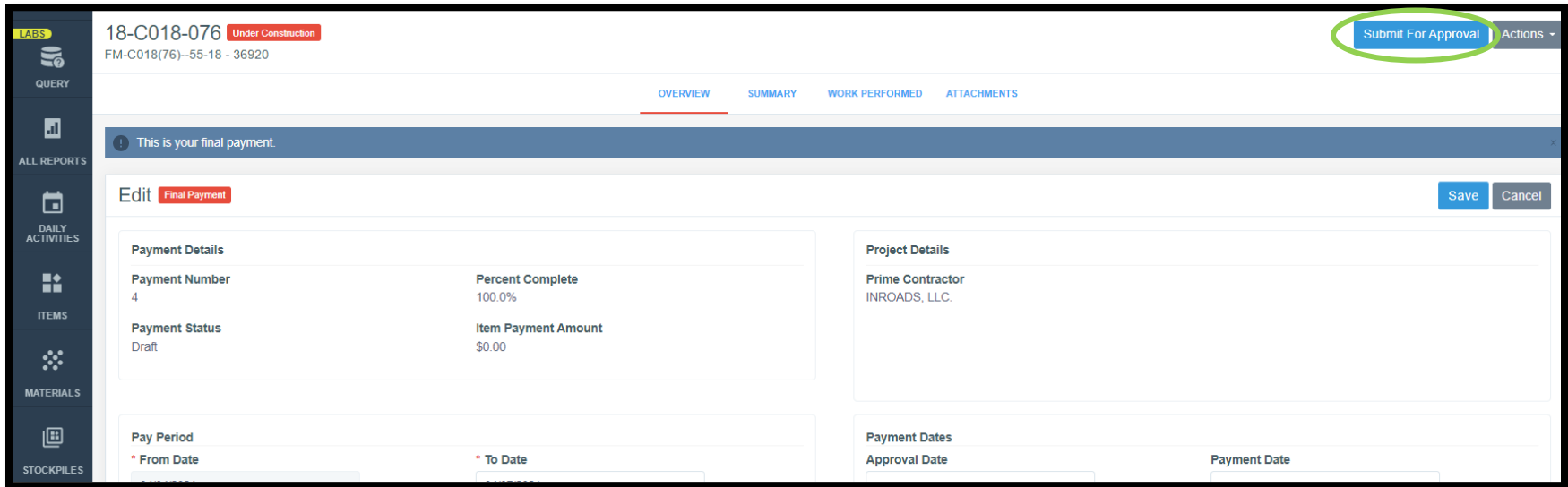
SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

When all tasks in the “Issue final payments screen have been completed”, it will either bring up this screen again where you can select the “Complete Final Voucher” button at the bottom....

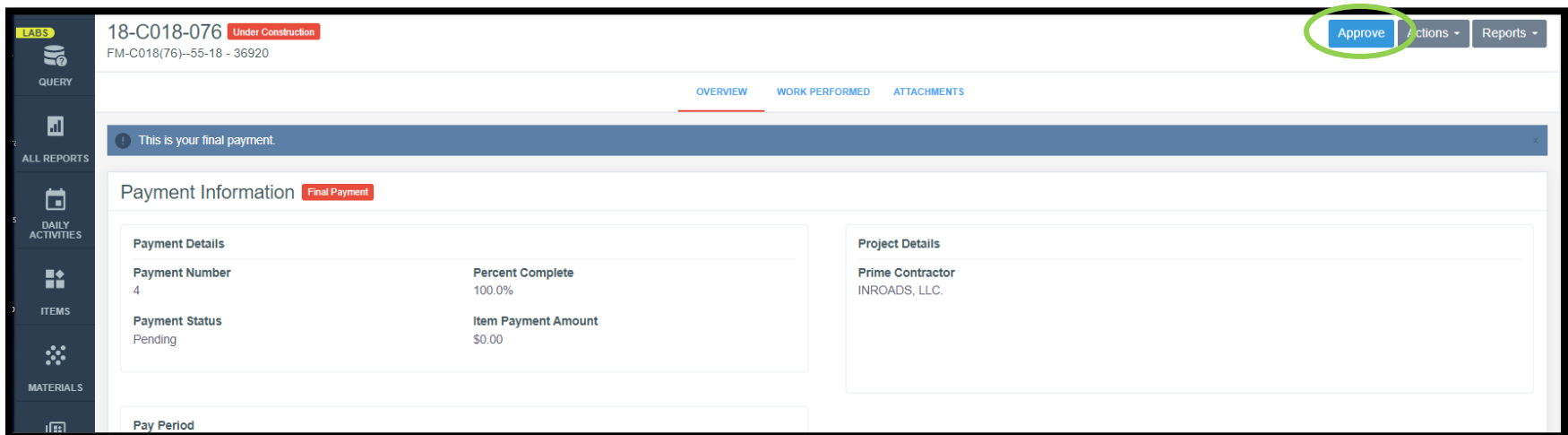


or....

it will bring you to the payment screen, and a ribbon across the top will say, “This is your final payment.” Review the details in the payment and then click on the blue “Submit for Approval” button in the top, right corner.



Then click the “Approve” button (if you have an access role that allows you to do approvals).



The Payments screen will now show Appia's Final Payment will a red "Final Payment" icon.

End Date	Status	Payment	To Date	% Complete	No.
04/07/2021	Approved <span style="color: red; font-weight: bold;">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

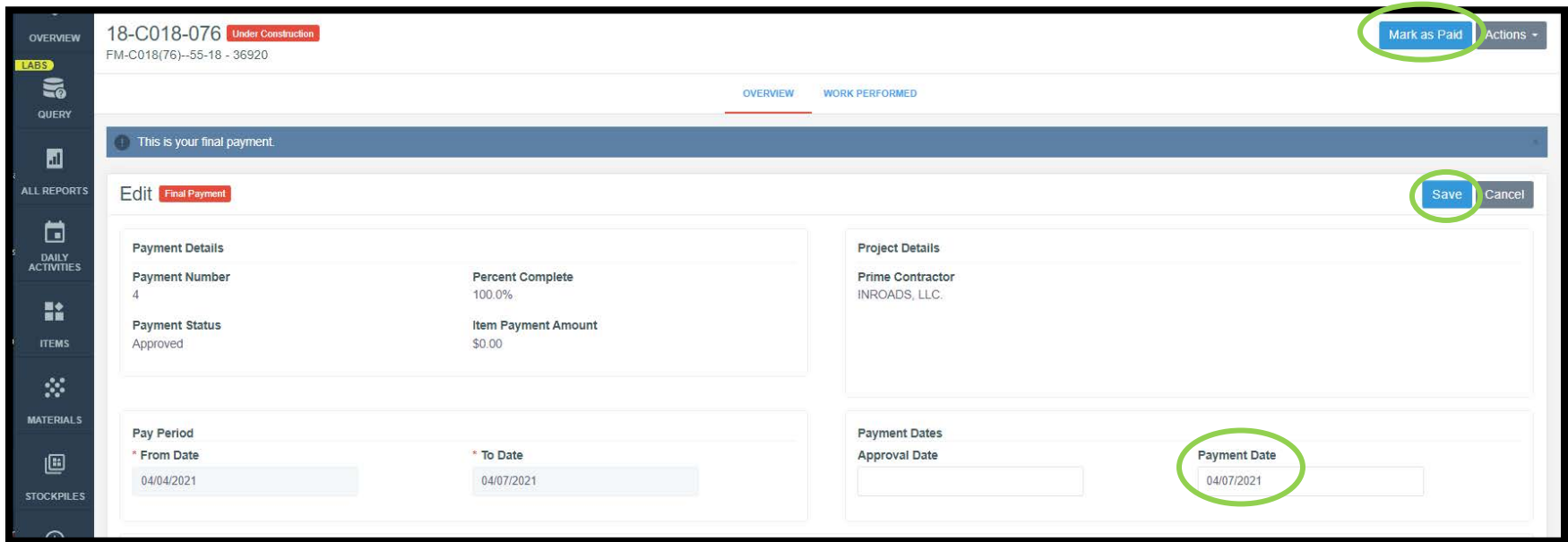
Displaying all 4 payments

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. When ready, click on the blue circle icon with the pencil (shown above) to edit the payment information.

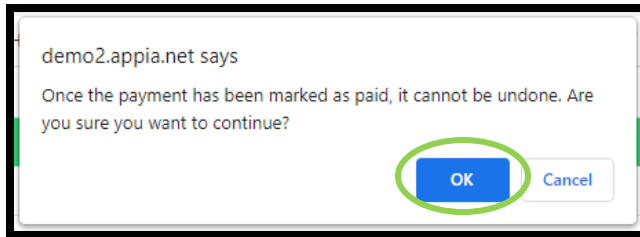
End Date	Status	Payment	To Date	% Complete	No.
04/07/2021	Approved <span style="color: red; font-weight: bold;">Final Payment</span>	\$1,308.87	\$43,629.00	100.0%	4
04/03/2021	Approved	\$37,927.00	\$42,320.13	100.0%	3
04/02/2021	Approved	\$4,365.00	\$4,393.13	10.4%	2
02/01/2021	Approved	\$28.13	\$28.13	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!**

# 12 - Contractors

(Reserved for Contractors instructions)

This section is reserved for future instructions on the Contractors tab.

# 13 - Funding

(Reserved for future Funding instructions)



This section is reserved for future instructions on the Funding tab.

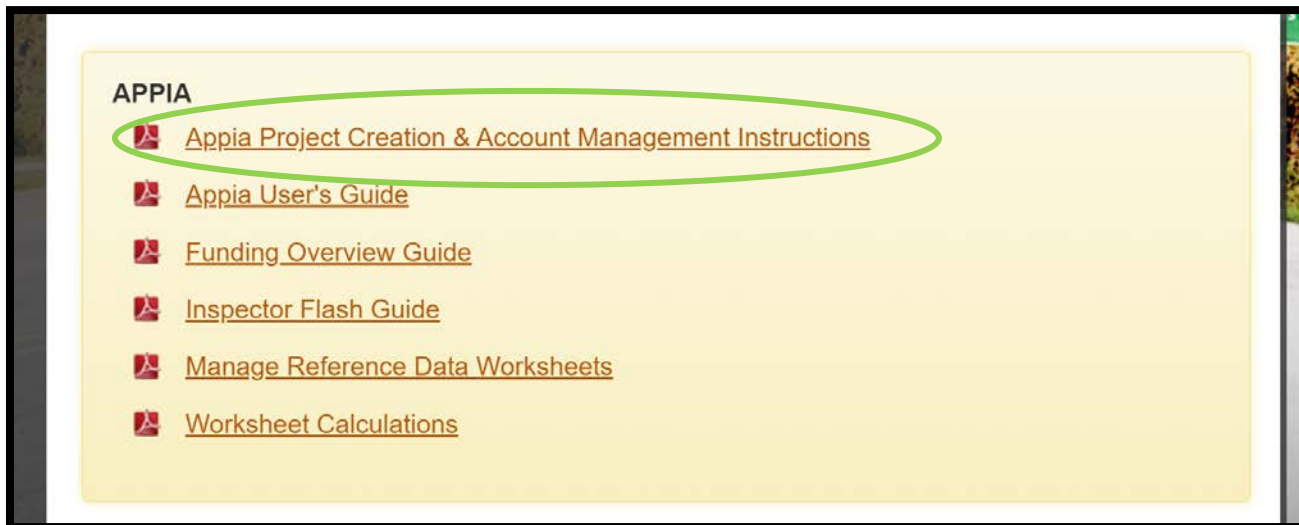
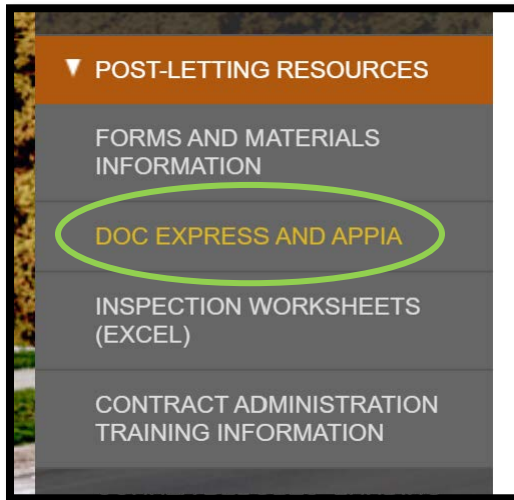
# 14 - More: Worksheets

(Reserved for Worksheets instructions)

This section is reserved for future instructions on Worksheets.

# 15 - 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”.



# 16 - 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. These PDFs can be merged together. **When a project is ready for audit/review, the Local Systems field staff may require the local agency to merge these quantity summaries and upload them to DocExpress.**

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 menu with the following items: MY PROJECTS, REFERENCE DATA, SYSTEM MGT, EXPORT DATA (highlighted with a green circle), EXPORT DATABASE, EXPORT PROJECTS, EXPORT REPORTS (highlighted with a red circle), and HELP. The main content area is titled 'Export Projects' and contains a 'Projects' section with a search bar. Below the search bar is a table with the following columns: Project ID, Description, and Project Status. The table lists several projects, many of which are marked as 'Imported'.

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. Push “Export”.

Export Reports

You can only export reports for under construction projects.

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

\* Start Date  
05/28/2020

\* End Date  
05/28/2020

\* Reports

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

Export Cancel

support@appia.net  
(888) 352-2439

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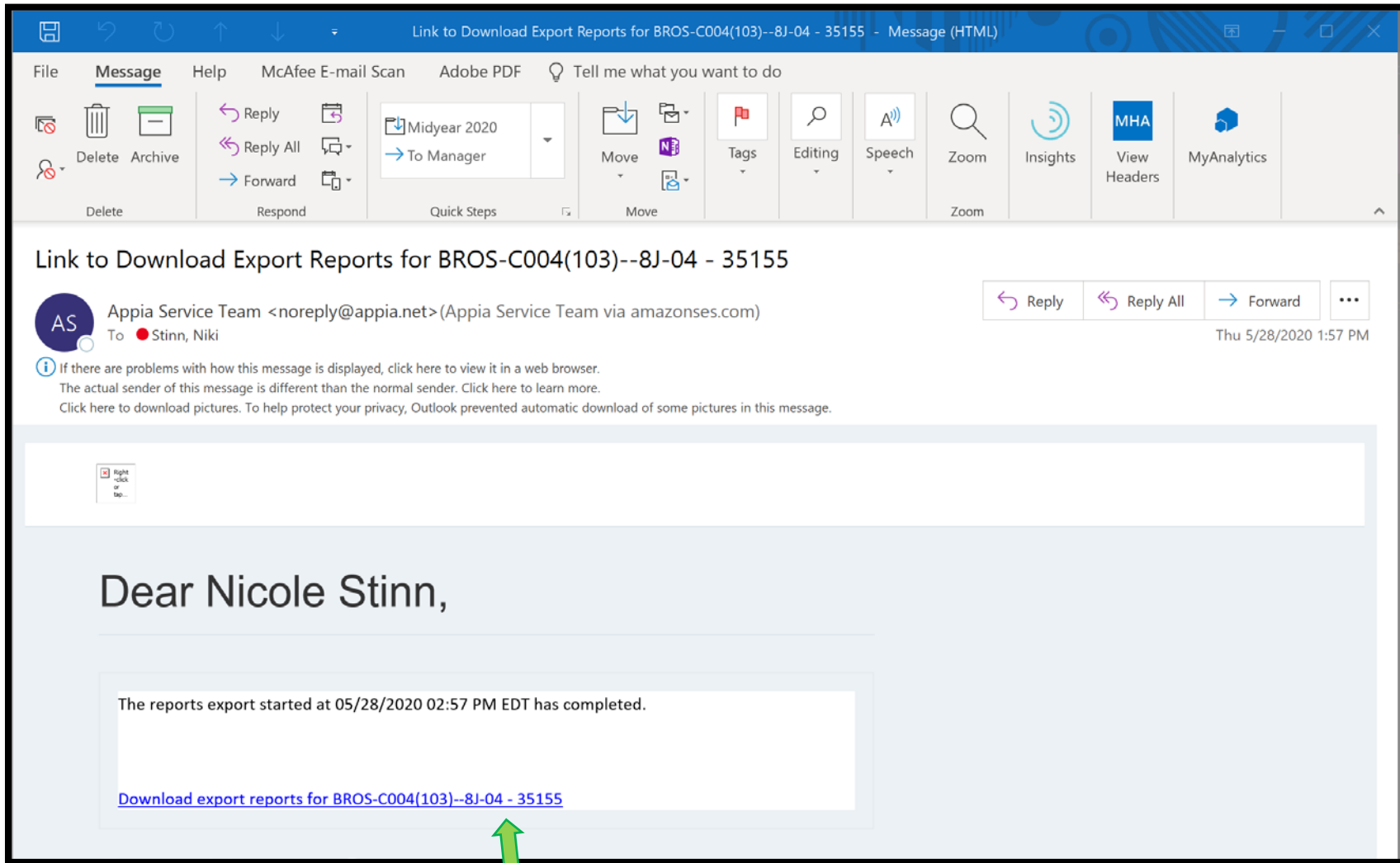
**The two specific exports that Local Systems staff will need for auditing/review purposes are “Daily Report” and “Item Quantity Summary”.** Once extracted the “Daily Report” reports can all be merged into one PDF and placed in the Diaries drawer in Doc Express. The Item Quantity Summary reports should 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 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. A "Pro tip" box is visible, suggesting users click or tap a star to add projects to favorites.

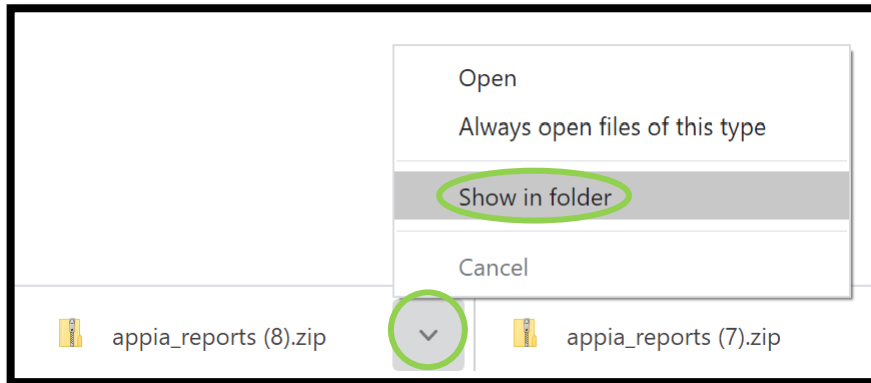
	Description	
★	03-C003-062	⌵
★	STP-S-C011(71)--5E-11 - 29427	⌵
★	36-C035-074 JSON TEST/FINANCE <span>Imported</span>	⌵
★	BHM-SWAP-1827(684)--SA-82-1 12345	⌵
★	BROS-C004(103)--8J-04 - 35155	⌵
★	BROS-C078(111)--FF-78_Payment for Multiple Sections	⌵
★	BROS-C086(60)--8J-86 - 31961	⌵

The email will look like this.

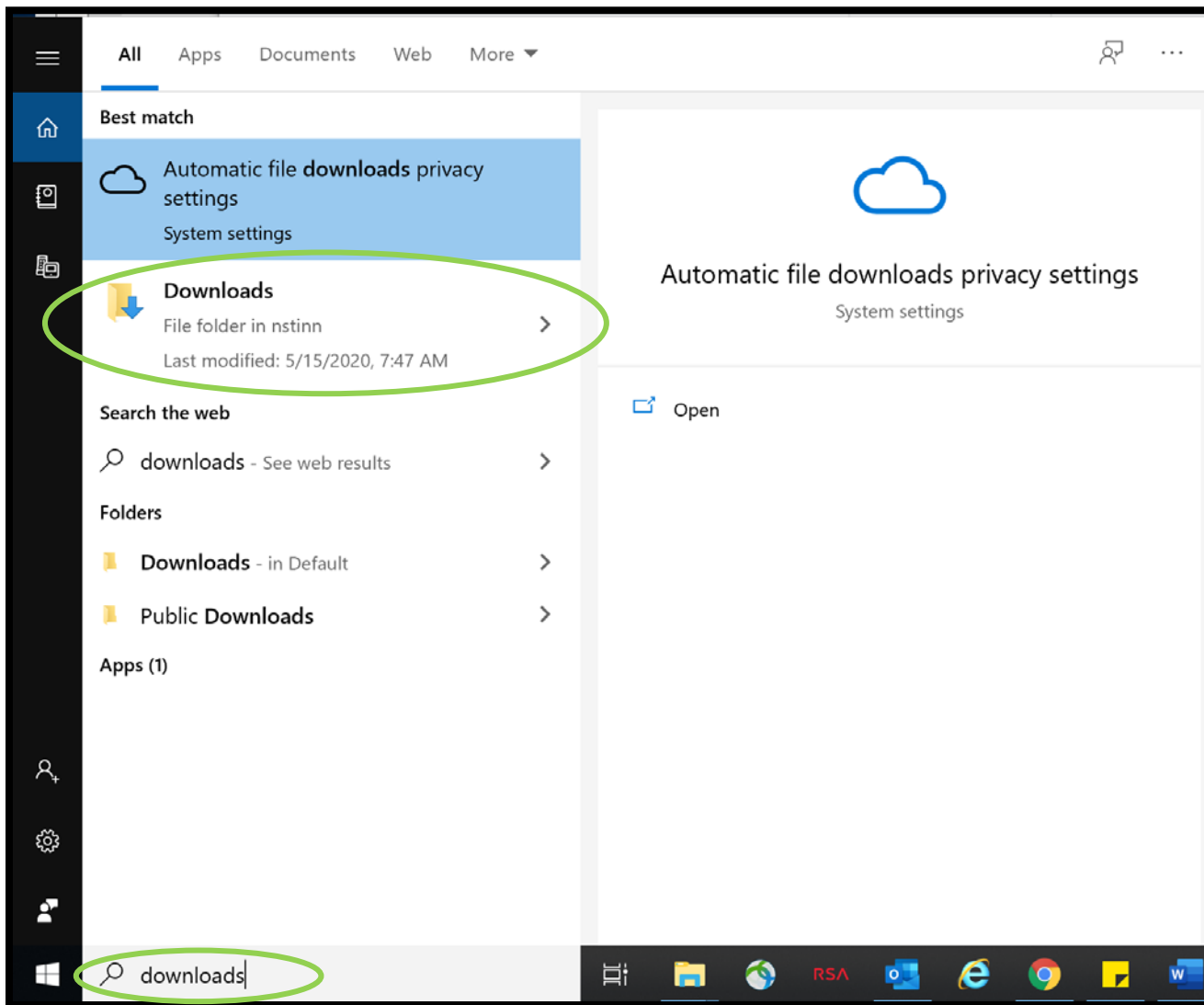


Click on the link here to download the project data.

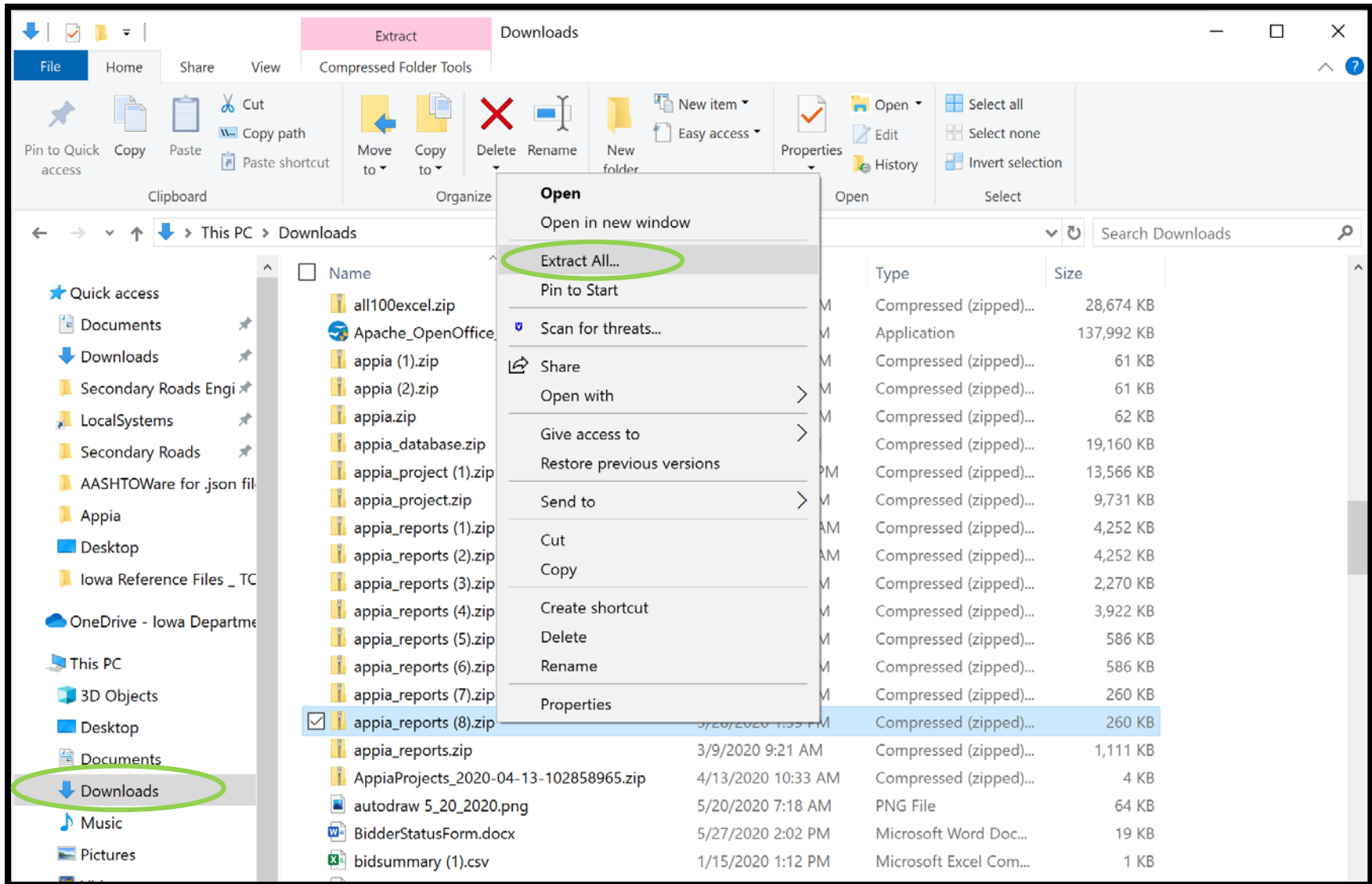
Depending on your browser, your file download may show up at the bottom like this. Click on the arrow to the right of the file name and then “Show in folder” to view the files.



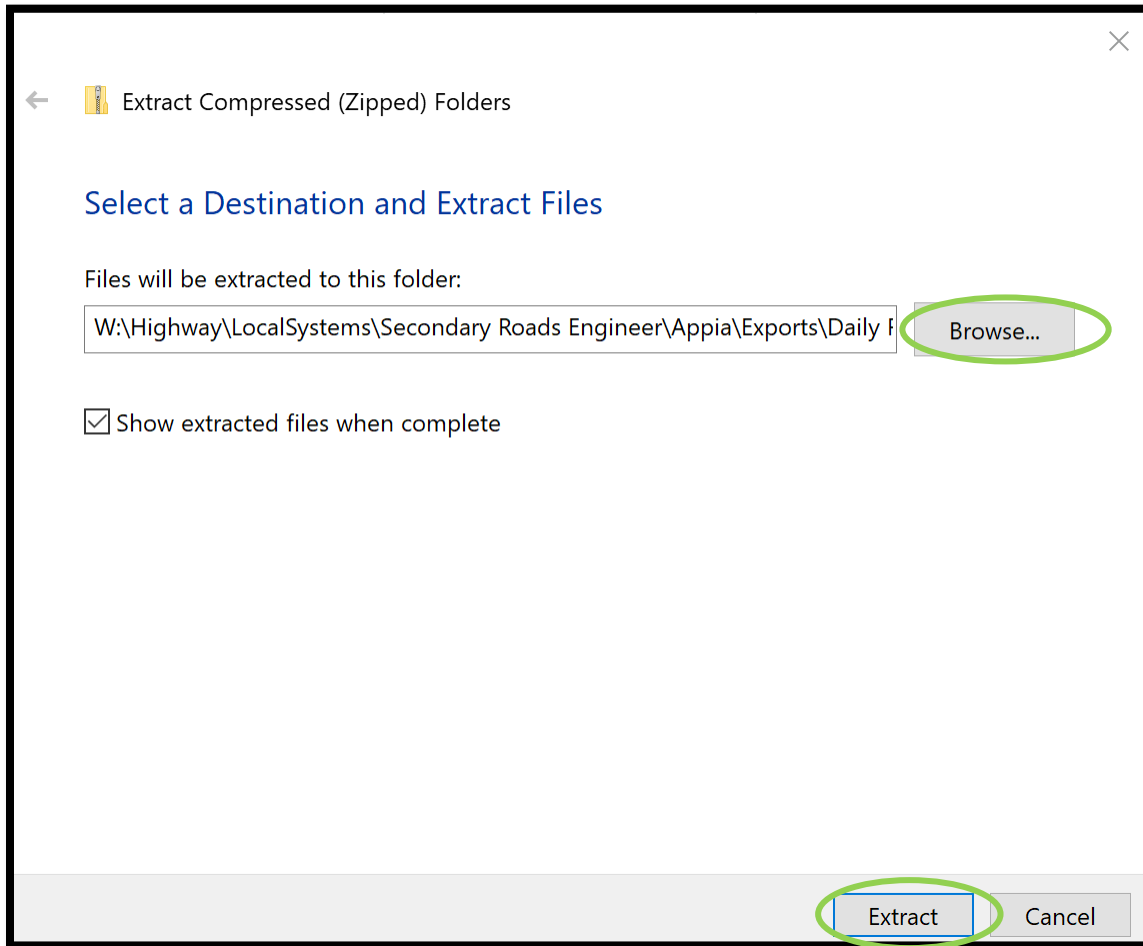
Alternately, once you have clicked on the link in the email, your zipped file can be found in the “Downloads” folder in your file explorer. The “Downloads” folder can be found by typing “downloads” in your search bar.



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



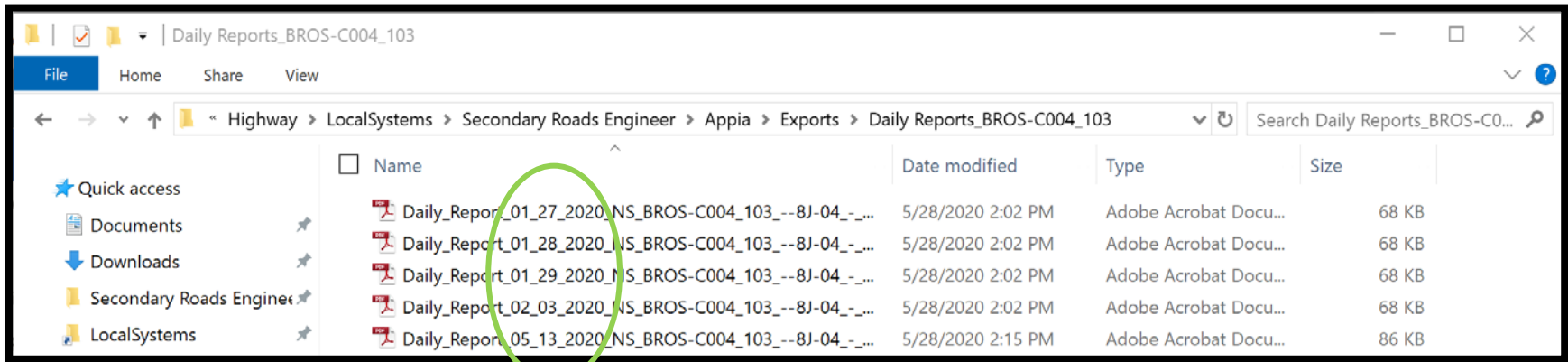
This window will pop up. Browse to find the location where you would like to save your project data.



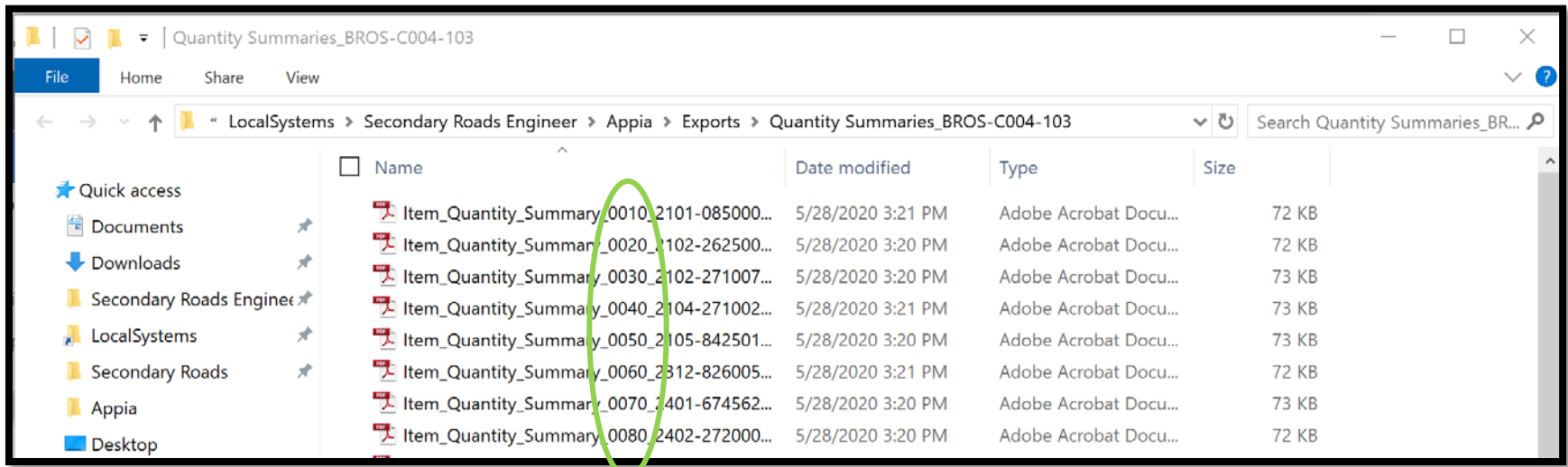
When you have selected the appropriate file in which to save your data, click "Extract".

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

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




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





A sample "Daily Report" report is shown here.



## 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.

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

05/28/2020  
Page 1 of 1

# 17 - 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”, click on the “Help” button at the bottom of the left menu bar.

The screenshot displays the 'My Projects' page in a web application. The left sidebar contains navigation options: MY PROJECTS, REFERENCE DATA, SYSTEM MGT, and EXPORT DATA. The 'HELP' button, represented by a question mark icon, is highlighted with a red circle. The main content area shows a table of projects with columns for Project ID and Description. A 'Pro tip' notification is visible, stating: 'Pro tip: Projects statuses are located here. Click or tap to select a different status than the one showing. Dismiss.' The table lists several projects, some marked as 'Imported'.

Project ID	Description
06-C006-113 <span>Imported</span>	06-C006-113
19-CO19-19-	IETTING dATE
36-C036-074 JSON TEST1 <span>Imported</span>	170221 031 TMC
36-C036-074 JSON TEST2 <span>Imported</span>	170221 031 TMC
36-C036-077 <span>Imported</span>	FM-C036(77)--55-36 - 35405
45-C045-086_Howard County	Howard County Tied Bridge Contract Letting Date: April 21, 2020
82-1827-677-3 34463	where is the

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

Contents Search

Home > Projects > Projects Hide

## Projects

Projects created in the Appia service are used to guide the work starting with estimation through the finished project. When you create a project in the Appia service, you enter information about the type of work and the location of the project, plus any percentages for business enterprises for disadvantaged, minority, or women own business.

The My Projects page displays all new projects and access to under construction and completed projects. The counter next to each heading shows how many projects you have access to in each phase.

After the initial project information is entered in the Appia service, use the options in the Sidebar menu to complete the project.

Click one of the following topics for more information:

- [Project Phases](#)
- [Favorites and Status Filter](#)
- [Import Projects](#)
- [Create or Edit Project](#)
- [Search Projects](#)
- [Delete Project](#)
- [Advance to Construction](#)

» » »

## **Local Systems Contact Information**

Contact Niki Stinn and/or Tammi Bell 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: 8:00am-4:45pm

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

#### **Tammi Bell**

Title: e-Construction Administrator

Email: [Tammi.Bell@iowadot.us](mailto:Tammi.Bell@iowadot.us)

Phone: 515-239-1529

(Messages forwarded. Leave message if unanswered.)

Days: Monday-Thursday

Hours: 6:00am-4:30pm