

CONTRACTOR/SUPPLIER DOC EXPRESS COOKBOOK – IOWA STYLE

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Instr Guide

- 1 New Company to get access to Doc Express
ONE person in the company, go to www.docexpress.com
Register
Alert Janet or Dean if you are the prime so they can give you
access to a contract(s)

- 5 New user to Doc Express **but company already has access**
Do **NOT** go to www.docexpress.com and register
Have another person in your company invite you to join
Register after receiving their invitation e-mail
Once registered you will automatically have the same access as other
users in your company

- 6 Change Account Information
Go to My Account screen
Change personal information only

- 7 See other users in your organization
Go to My Account screen
Scroll down and all users will be listed along with their status

- 8 View contracts
Go to Doc Express screen
All contracts to which you have access are displayed
You have a choice of line or grid view by selecting that icon
located to the far right of the word Contracts

- 9 Tag field
Go to Doc Express screen
Click on Actions > Manage Tags
This is a field where you can enter a job number or something that
makes sense to you to describe the contract. DOT users cannot
see this field
Enter your choice – more than 1 user can enter a tag for the same
contract and all will be displayed
Save

- 10 Mark a contract as a Favorite
 - Go to Doc Express screen
 - Click the word Favorite beside the contract of your choice
 - The contract will move to the top of your list of contracts
- 10 To remove a contract from being a Favorite
 - Go to Doc Express screen
 - Click the word Favorite
 - The contract will return to its normal order in the list of contracts
- 11 To see the number of submittals in a drawer that have had no action taken
 - Go to Doc Express screen
 - The number inside the badge beside each drawer indicates the number of submittals made to that drawer that have had no action taken since the initial submittal
 - If no badge beside the drawer, either all documents have been transitioned at least once or there are no documents in the drawer
- 11 Search for a contract
 - Go to Doc Express screen
 - The search field is always seen – can enter contract info of your choice
 - Can do an advanced search for prime contractors, letting dates, and contract statuses like locked or favorite
- 11 Filter options
 - The filter options change somewhat depending on whether you're in the list of contracts or in a drawer
 - Go to Doc Express screen
 - Click on the "X" in the middle of the screen under the Search field
 - Can use 1 or multiple filters at the same time
 - If you filter on different types one right after the other, be sure to allow the list of submittals to refresh before selecting the next type to filter on. This is especially important when filtering in a drawer and selecting a type in the Document Types field.
- 11 Viewing Locked Contracts
 - Go to Doc Express screen
 - At the list of contracts, open the filter (click on "X" in middle of the screen)
 - Change the filter from All Contracts to Locked Contracts
 - To see active contracts again, change the filter back to All Contracts
- 12&19 Allow other subs/suppliers to view your submittals
 - Go to Doc Express screen
 - Open a contract
 - Click on Actions > Manage Access
 - Put a checkmark in Enable Downloads for whatever subs and/or suppliers

you wish to allow to open the documents you submit in those specific drawers.

No checkmark means that sub/supplier can see that the submittal was made but can't open the document itself

13 Notifications

Go to Doc Express screen

Click on Preferences > Notifications

Ready to be progressed option

These are real time notifications

Select to be notified on a drawer by drawer basis

Rejected option

This is a real time notification

Automatically includes all drawers so a notice is sent any time a rejection of a document occurs

Summary options

These are sent daily

Every transition listed by contract and drawer that took place the preceding day are displayed

One summary option shows transitions from the previous day for every contract to which you have access

The other summary option shows only those contracts' transitions marked as your Favorite

Completed documents

These are real time notifications that can be turned off, turned on for all documents, for only documents that you have actively worked on, or for only selected drawers.

14 Dashboard

Go to Doc Express screen

Informational only

Lists documents ready to be transitioned by contract and/or drawer

Lists all documents that are past due

IF there was a due date entered by a DOT user previously

Lists all contracts due soon – select time period in months or days

We use the late start date in this field so users can tell at a glance if their contract should be starting or is past the late start date

Shows the total number of contracts/documents submitted and also the number within the past number of months selected

15 Drawer Structure

Informational only

17 Submittal Screens

Informational only

- 20 Due Dates
Must be entered by a DOT user (is optional)
If a submittal is overdue, will be noted under the title of the document
These overdue documents, if any, are displayed in the Dashboard
- 21 Submitting to the **Contract Documents** drawer
Go to Doc Express screen
Open the Contract Documents drawer by clicking on it
Click Submit
Enter a title – if a number, use 2 digits, if a date, use 6 digits (eg 09-15-15)
Select the appropriate type
In the Attachment field, browse to the location of the submittal
Add Supporting Documentation if desired
Enter a Comment if desired
Save

If a submittal is rejected, correct it and resubmit it so it “replaces” the original submittal.
Do NOT submit the corrected document as though it were new.

- 23 Submitting to the **Pay Items** drawer
Go to Doc Express screen
Open the Pay Items drawer by clicking on it
Click Submit
Enter a title – if a number, use 2 digits, if a date, use 6 digits (eg 09-15-15)
Select the appropriate type
In the Attachment field, browse to the location of the submittal
Add Supporting Documentation if desired
Enter a Comment if desired
Sign by putting a checkmark in front of the signature statement
Save

If a submittal is rejected, correct it and resubmit it so it “replaces” the original submittal.
Do NOT submit the corrected document as though it were new.

- 26 Signing a **Contract Modification**
Go to Doc Express screen
Open the Contract Modification drawer by clicking on it
Find cont mods with a status of Submitted
Click on the title to view the cont mod before signing
Click on the word Transition
Select the Reviewed by Contractor status to give your “approval”
Enter a Comment if desired
Click Save
Sign your name & also put a checkmark in front of the signature statement
Click Save

- 30 Submitting to the **Payrolls** drawer
ONLY THE PRIME CONTRACTOR IS TO SUBMIT TO THIS DRAWER
After you have already checked the payrolls received from the subcontractor(s) and signed them as usual
Go to Doc Express screen
Open the Payrolls drawer by clicking on it
Click Submit
Enter a title – if a number, use 2 digits, if a date, use 6 digits (eg 09-15-15)
Select the appropriate type – there is a type for each contractor
In the Attachment field, browse to the location of the payroll
Add Supporting Documentation if desired
Enter a Comment if desired
Save

If a Payrolls drawer doesn't have a type for a specific contractor
Contact Janet (641-782-2096) or Dean (712-202-0818) to add them

If a payroll is rejected, correct it and resubmit it so it "replaces" the original submittal. Do NOT submit a corrected payroll as though it were new.

- 31 Submitting to the **Working** drawer
Go to Doc Express screen
Open the Working drawer by clicking on it
Click Submit
Enter a title – if a number, use 2 digits, if a date, use 6 digits (eg 09-15-15)
In the Attachment field, browse to the location of the payroll
Add Supporting Documentation if desired
Enter a Comment if desired
Save
- 32 To change and re-submit a document to Working drawer
Go to Doc Express screen
Open the Working drawer by clicking on it
Click title of the document and save it to a location such as your hard drive
Edit the document as desired and save it
Beside the original submittal, click Resubmit document
Browse to the location of the edited submittal
Enter a comment if desired
Save
- 33 Submitting to the **Shop Drawings** drawer
Go to Doc Express screen
Open the Shop Drawings drawer by clicking on it
**Enter a title for the document using the following naming convention
paren number of the PROJECT (not the contract in case of tied**

**projects) followed by the design number (if applicable)
followed by a description of the submittal**

Select the appropriate type
In the Attachment field, browse to the location of the shop drawing
Add Supporting Documentation if desired
Enter a Comment if desired
Save

Re-submitting a shop drawing

Go to Doc Express screen
Open the Shop Drawings drawer by clicking on it
Find the document to be edited and re-submitted as per the status
If there is a marked up copy, double click on that submittal (not the title but
the submittal by the previous user's name in the log) to view it
Make the corrections noted and save it
Click Resubmit
Attach your edited document
Enter a comment if desired
Save

34 Submitting to the **Signature** drawer

Go to Doc Express screen
Open the Signature drawer by clicking on it
Enter a title – if a number, use 2 digits, if a date, use 6 digits (eg 09-15-15)
Select the appropriate type
In the Attachment field, browse to the location of the submittal
Add Supporting Documentation if desired
Enter a Comment if desired
Sign your name & also put a checkmark in front of the signature statement
Click Save

Signing in the Signature drawer

Go to Doc Express screen
Open the Signature drawer by clicking on it
Beside the appropriate submittal with a Submitted status click Transition
Select Signed by Contractor as the status
Enter a comment if desired
Add supporting documentation if desired
Sign your name & also put a checkmark in front of the signature statement
Click Save

36 **Plans** drawer

Only DOT users submit to this drawer
The most current set of plans should always be at the top of the list and
should be displayed when clicking on the title

GENERAL INFO FOR ALL DRAWERS -

To view the log –

- Go to Doc Express screen
- Open any drawer by clicking on it
- Click on the down arrow to the far right of any submittal
- The log for that specific submittal will be displayed

To see the signature history (Contract Modifications and Signature drawers only)

- Go to Doc Express screen
- Open either the Contract Modifications drawer or the Signatures drawer
- Select any submittal that has a status other than Submitted
- Click on the title of the document
- Scroll down to the last page that is now attached to the document
 - Contract Modifications –
 - Signatures must be obtained in a specific order
 - The last to sign is to mark it Completed
 - Signatures –
 - There is no certain order required for signatures
 - Different forms require different signatures
 - The same person who submits may also sign and mark it Complete

To Remove a submittal

- If you submitted and no other activity has occurred (no comment, transition, etc.) you can delete it by clicking on Remove to the far right of the submittal.
- Only the submitter has the right to remove a document they submitted

38 **IF YOU ARE THE PRIME CONTRACTOR**

Giving access to subs and suppliers –

- Go to Doc Express screen
- Open the contract
- Click on Actions > Manage Access
- Click on Add Organizations
- Enter the sub's or supplier's name or partial name and click on it when displayed
- Click Next
- For access to all drawers, click in the all access "box" then click on their name
- For access to only certain drawers, click only on the contractor's name then at the Manage Access screen, put a checkmark in only the drawers to which you want them to have access
- Click Update

To change access for a sub or supplier

- Go to Doc Express screen
- Open the contract

Click on Actions > Manage Access
Beside the appropriate name, add or remove access to drawers
Click Update

To remove complete access to a contract for a sub or supplier
Go to Doc Express screen
Open the contract
Click on Actions > Manage Access
Click on the red "x" to the far right of the contractor's name