

DOC EXPRESS – IOWA STYLE

INSTRUCTION GUIDE

for

IOWA DOT USERS

OCTOBER, 2015



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DOC EXPRESS
IOWA DOT
(OCTOBER, 2015)
TABLE OF CONTENTS

NEW USER NEEDS ACCESS	1
CHANGING YOUR ACCOUNT INFORMATION	2
SEE OTHER USERS IN YOUR COMPANY.....	3
ON-LINE HELP.....	4
VIEWING CONTRACTS.....	4
IN ROWS.....	5
IN GRID.....	5
MARK CONTRACT AS A FAVORITE	6
BADGES	7
SEARCH AND FILTER FIELDS	7
SEEING LOCKED CONTRACTS	7
NOTIFICATIONS.....	8
REAL-TIME DRAWER OPTION – TURNED OFF.....	8
REAL-TIME DRAWER OPTION – TURNED ON FOR ALL.....	9
REAL-TIME DRAWER OPTION – SELECTIVELY ON/OFF	9
REAL-TIME REJECTION NOTICES	9
SUMMARY REPORTS.....	9
DASHBOARD.....	10
DRAWER STRUCTURE	
CONTRACT DOCUMENTS	11
PAY ITEMS	11
PAYROLLS	11
CONTRACT MODIFICATIONS	11
WORKING.....	12
SHOP DRAWINGS.....	12
SIGNATURE	12
PLANS.....	12
INITIAL SCREENS WHEN SUBMITTING DOCUMENTS	13
PAY ITEMS	13

CONTRACT DOCUMENTS	13
PAYROLLS	13
SHOP DRAWINGS.....	13
WORKING.....	13
PLANS.....	13
CONTRACT MODIFICATIONS	14
SIGNATURE	14
VIEWING ALREADY SUBMITTED DOCUMENTS.....	15
DUE DATES	16
DUE DATES FILTER.....	17
CONTRACT DOCUMENTS – SUBMITTAL & TRANSITIONS	18
SUBMIT	18
RECEIVE/REJECT	20
LOG.....	21
PAY ITEMS – SUBMITTAL & TRANSITIONS	22
SUBMIT	22
RECEIVE/REJECT	25
LOG.....	26
UPDATE BUTTON- changing types, titles & due dates.....	27
AUDITED STATUS.....	27
CHANGE SEVERAL AT ONCE TO AUDITED STATUS	28
CONTRACT MODIFICATIONS – SUBMITTAL & TRANSITIONS.....	29
SUBMIT	29
SIGN & MARK COMPLETE AT SAME TIME.....	30&34
LOG.....	34
SIGNING HISTORY	36
PAYROLLS – SUBMITTAL & TRANSITIONS	36
RECEIVE/REJECT	37
CHECKING PAYROLLS.....	37
WORKING – SUBMITTAL & TRANSITIONS.....	38
SUBMIT	39
LOG.....	40&41
PUBLISH	41
SHOP DRAWINGS – SUBMITTAL & TRANSITIONS	43
SUBMIT	43
NAMING CONVENTION OF SUBMITTALS.....	43
WORK FLOW	45

SIGNATURE – SUBMITTALS & TRANSITIONS.....	52
SUBMIT.....	52
SIGNING.....	52
SIGNING HISTORY.....	54
PLANS – SUBMITTAL & TRANSITIONS.....	54
SUBMIT.....	55
WORK FLOW.....	56
EXPORTING DATA.....	65
ARCHIVING (hiding) DOCUMENTS.....	68
ODDS & ENDS.....	68
APPENDIX A – as of 8/1/2015.....	69
CONTRACT DOCUMENTS DRAWER TYPES	
APPENDIX B - as of 8/1/2015.....	70
SIGNATURE DRAWER TYPES	
APPENDIX C - as of 6/1/2015.....	70
SHOP DRAWING DRAWER TYPES	
APPENDIX D - as of 6/1/2015.....	71
PAYROLLS DRAWER ROUTINE TYPES	
APPENDIX E as of 6/1/2015.....	71
PAY ITEMS DRAWER ROUTINE TYPES	
GROUPINGS IN PAY ITEMS DRAWER, IF NEEDED	
APPENDIX F as of 6/1/2015.....	72
MATERIAL DOCUMENTATION CLARIFICATION	
SINGLE DOCUMENT BASIS OF ACCEPTANCE	
MULTIPLE DOCUMENT BASIS OF ACCEPTANCE	

DOC EXPRESS – IOWA STYLE

IOWA DEPARTMENT OF TRANSPORTATION

October, 2015

Want to begin using Doc Express but don't have a password or know how to get into the program? Contact or send a note to either Janet (janet.wasteney@dot.iowa.gov) or Dean (dean.herbst@dot.iowa.gov) stating such. They will, in turn, send you an e-mail such as the one shown below inviting you to join the Iowa DOT group.

Subject: You've been invited to join Iowa DOT on Info Tech Express.



Info Tech™
INNOVATION AT WORK

Dear Info Tech Express User,

Please click the link below to join Iowa DOT

[Create Account](#)

Note: This link expires at 10/23/2014 01:04 PM CDT

When you receive the e-mail, click on the Create Account link (as shown above) and the following screen will be displayed which you will complete and then click Activate.

DO NOT GO TO THE DOC EXPRESS WEB SITE AND REGISTER ON YOUR OWN. CONTACT DEAN OR JANET AND WAIT FOR YOUR E-MAIL INVITATION TO JOIN THE IOWA DOT ORGANIZATION.

Account Activation

Welcome **bobby.dahl@dot.iowa.gov**.
To enroll as a member of Iowa DOT, please complete the form below.

* First Name

* Last Name

* Password

* Password Confirmation

* Question

* Answer

If you forget your password we'll ask you to verify this.

I have read and agreed to [Privacy Policy](#), [Terms of Use](#), and [DMCA Policy](#).

Activate Cancel

Once logged into the Doc Express program you will see the contracts and drawers to which you have been given access. If you feel you are missing one/some contracts and/or drawers, let Dean or Janet know.

CHANGING YOUR ACCOUNT INFORMATION –

When you first log in to Doc Express your account information is the first thing you see.

My Account Edit Actions

Jennifer Strunk

jennifer.strunk@dot.iowa.gov

(555) 555-5555

(641) 782-4518

(641) 782-6618

800 Lincolnway, Ames, IA 50010
(515) 239-1352

The address and phone number displayed on the right of the screen is the main company's address and cannot be changed by individual users.

You have the option to change your e-mail address, your security challenge question and your password at any time. Do so by clicking the Actions button in the upper right area and a drop down list will be displayed. Simply select the one you want to change and the appropriate screen will be displayed for you to enter your changes.

If you want to change your personal phone and fax numbers (shown on the left side of the screen), click the Edit button and then make the desired changes in the screen displayed (example below). Once again, you cannot change the business name, address, or time zone but you can change the mobile, phone, and fax number fields shown on the left side of the screen

My Account	
* First Name	* Business Name
Jennifer	Iowa DOT
* Last Name	* Business Phone
Strunk	(515) 239-1352
Mobile	* Address1
(555) 555-5555	800 Lincolnway
Phone	Address2
(641) 782-4518	
Fax	* City
(641) 782-6618	Ames
* Time Zone	* State
(GMT-05:00) Eastern Time (US & Canada) <input type="checkbox"/>	Iowa

SEE OTHER USERS IN YOUR COMPANY -

To see others in your company who have access to Doc Express, go to My Account and scroll to the bottom of the screen. A list of users, their e-mail address, and their status (Manager, User, or Reviewer) for your company is displayed. An example is shown below –

Employees
Jennifer Strunk jennifer.strunk@dot.iowa.gov User
Jason Clark clarkj25@michigan.gov Manager
Lee Shepard lee.shepard@dot.iowa.gov User
Greg Mulder greg.mulder@dot.iowa.gov Manager
Janet Wasteney janet.wasteney@dot.iowa.gov Manager
Dean Herbst dean.herbst@dot.iowa.gov Manager
Thomas Jacobson thomas.jacobson@dot.iowa.gov Manager
7 Users

If you are in the program and aren't sure how to get to My Account, click on the horizontal lines in the far upper left area of the screen and select it from the drop down list

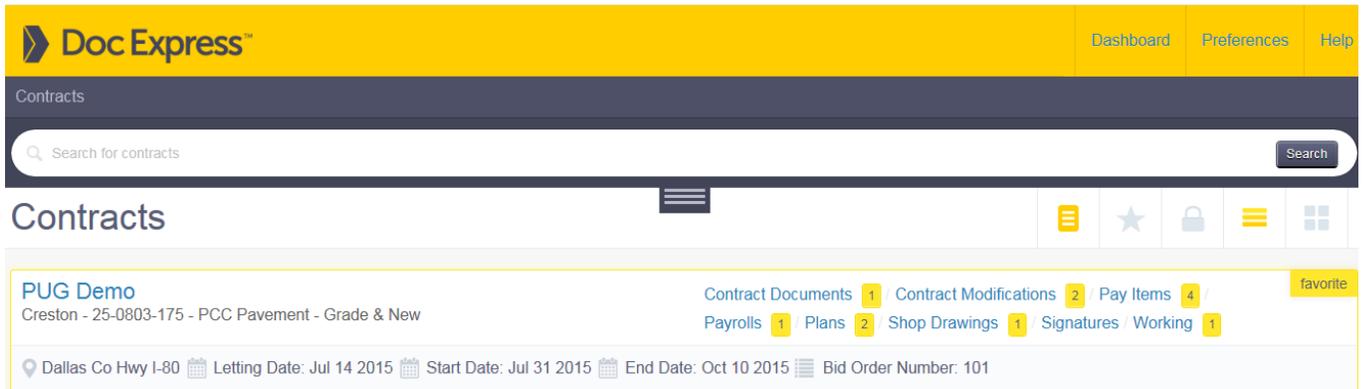
ON-LINE HELP –

There is on-line help within the program that you can access by clicking on the word “Help” in the upper right corner of every screen once you are in the Doc Express program. Although this is an excellent resource, if you need to talk to a local support person, contact either Dean Herbst – dean.herbst@dot.iowa.gov (Office – 712-202-0818, Cell – 515-571-7073) or Janet Wasteney – janet.wasteney@dot.iowa.gov (Office – 641-782-2096, Cell – 641-344-0044)

VIEWING CONTRACTS -

There are 2 views from which to select when viewing the list of contracts. The first (shown below) is similar to the previous version of Doc Express in that the contracts are

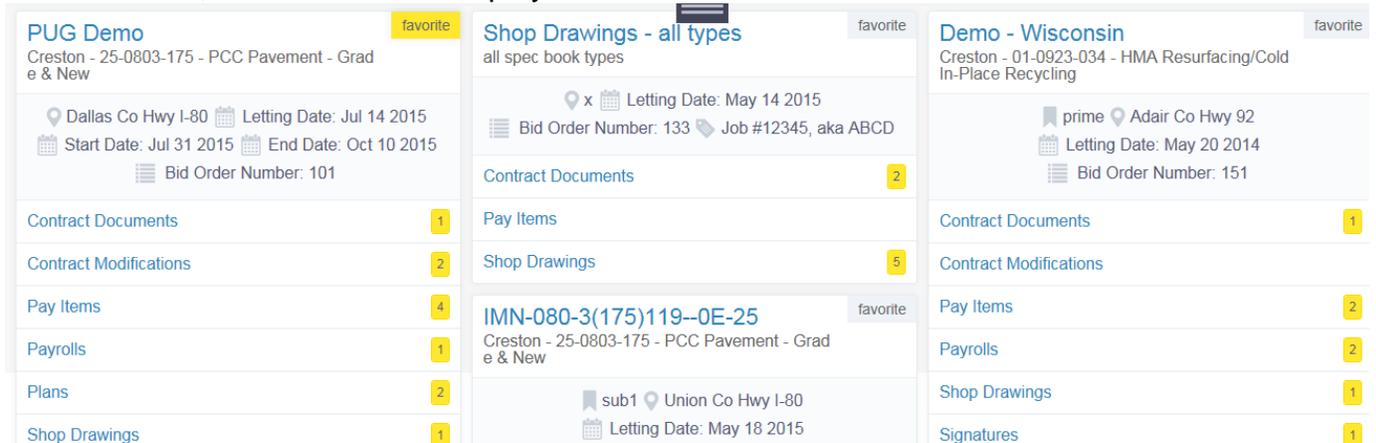
listed in rows, one below the other. The type of view displayed is due to the choice selected (shown in yellow in the following graphic) in the upper right area of the screen, just below the Search button.



Notice that the contract information is on the left and the drawers are listed on the right.

There are some icons displayed just above the drawer location when in the row view. The icons represent the same options as what you would find in the Filter area – just an easier and quicker way to select them.

The other choice for viewing the contracts, shown below, is the grid view. This option displays the contracts in grids with all information within that contract's grid. Notice that the yellow highlighted choice just below the Search button is what determined this look. With this view, the drawers are displayed below the contract information.



There is no right or wrong view choice – it's strictly a personal preference. The same contract information is displayed no matter which view is selected, just with a bit different look.

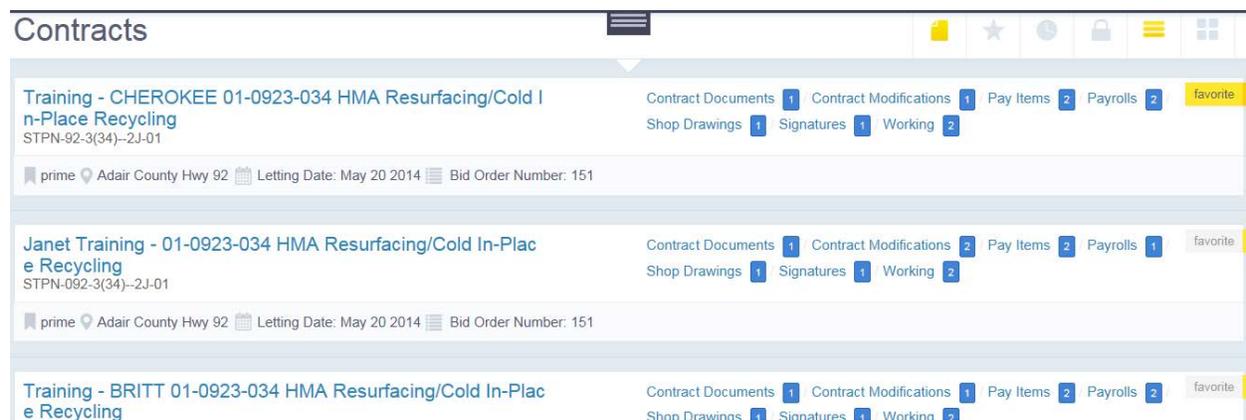
The project number is displayed first. If there are multiple projects, the main project number will be shown in its entirety with the additional projects being displayed with the highway number (if different from the main project number) followed by the paren number for each project with each project separated by a comma.

Below the project number(s), the DOT Residency in charge of the contract is listed first followed by the contract ID and then the description of the contract. If there are multiple projects in the contract, the description of the contract as shown on the contract document is displayed.

Additional details show the prime contractor's name, the county name, highway number, letting date and bid order number. All the drawers available for that particular contract to which you have access are displayed either to the right or below the contract information, depending on the view you have chosen.

FAVORITE CONTRACT –

If you have access to several contracts but you are working with 1 all the time and really don't need to see the others, you have the option to mark 1 or more contracts as your favorite. To do so, find the word "favorite" to the far right of the contract information. When you click on it, it will turn yellow so you can easily see that it has been marked as a favorite. See below.



Contracts marked as a favorite will automatically be moved to the top of the list of contracts.

One of the filters available allows you to display only the contracts marked as a favorite. By using that filter option, the favorite contracts will be displayed and the others will be hidden. If you no longer want a contract marked as a favorite, simply click on the word "favorite" again and the contract will revert back to its original position in the list of contracts and no longer be marked as a favorite.

There is a summary notification which will display data for only the contracts you have marked as your favorite.

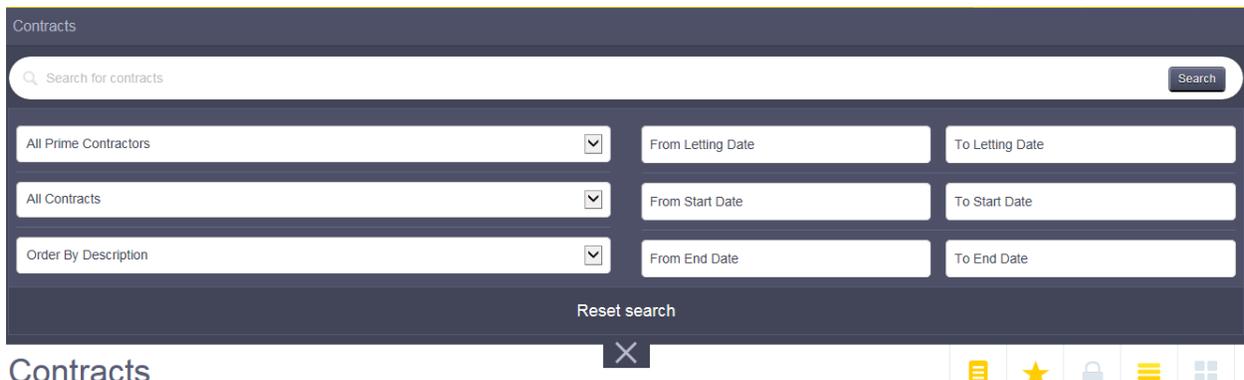
BADGES -

If you see a badge with a number in it beside a drawer (see previous graphic), that reflects the number of documents in that drawer with the submitted status. For instance, if the badge has a 2 in it, there are 2 different submittals needing attention. This is an easy way to see what contracts and what drawers have a need for some action to be taken. Having this badge displayed is automatic and is not dependent on any other choices made within the program.

SEARCH and FILTER - Filter fields are dependent on the screen you are viewing. The search field is visible on most screens but, by default, the filter fields are hidden. By clicking on the horizontal lines (where the X is now shown below), the filter fields are displayed. You can filter on 1 or more fields at the same time.

The graphic below displays the search and filter fields available when viewing the list or grid of contracts.

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.

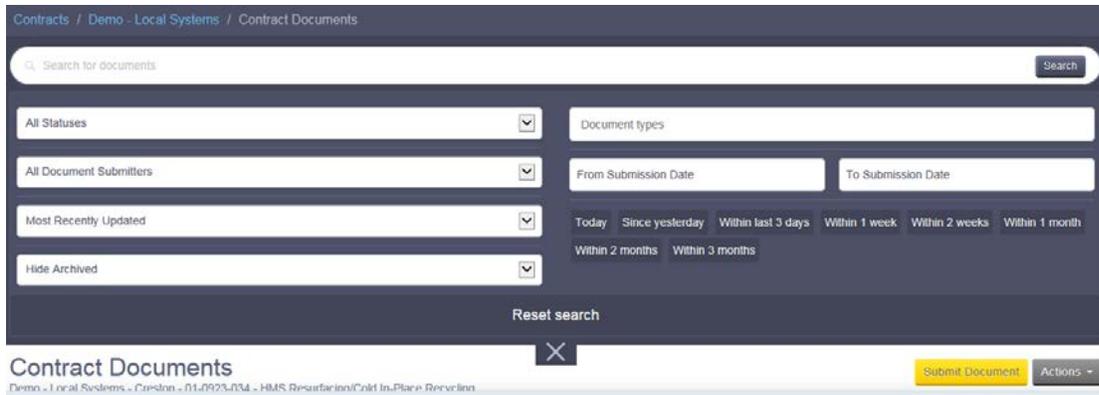


The screenshot shows a dark-themed interface for searching and filtering contracts. At the top, there is a search bar with the placeholder text "Search for contracts" and a "Search" button. Below the search bar, there are three rows of filter fields, each with a dropdown menu and a "Reset search" button at the bottom. The first row has "All Prime Contractors" (dropdown), "From Letting Date" (text input), and "To Letting Date" (text input). The second row has "All Contracts" (dropdown), "From Start Date" (text input), and "To Start Date" (text input). The third row has "Order By Description" (dropdown), "From End Date" (text input), and "To End Date" (text input). Below the filter fields, there is a "Reset search" button. At the bottom of the screenshot, there is a navigation bar with the word "Contracts" and a close button (X). To the right of the navigation bar, there are several icons: a list icon, a star icon, a lock icon, a hamburger menu icon, and a grid icon.

SEEING LOCKED CONTRACTS -

By default, the contracts screen will show all active contracts. If you want to see only the locked contracts, simply change the filter field from All Contracts to Locked.

As stated previously, the filter fields available are dependent on the screen you are viewing. The following graphic displays the search and filter fields available when viewing a drawer. By clicking in the Document Types field, only those types (we formerly referred to them as folders) in that drawer that have had a submittal made will be displayed. The only way to see the entire list of possible types in a drawer is to pretend to submit a document and click in the Types field.

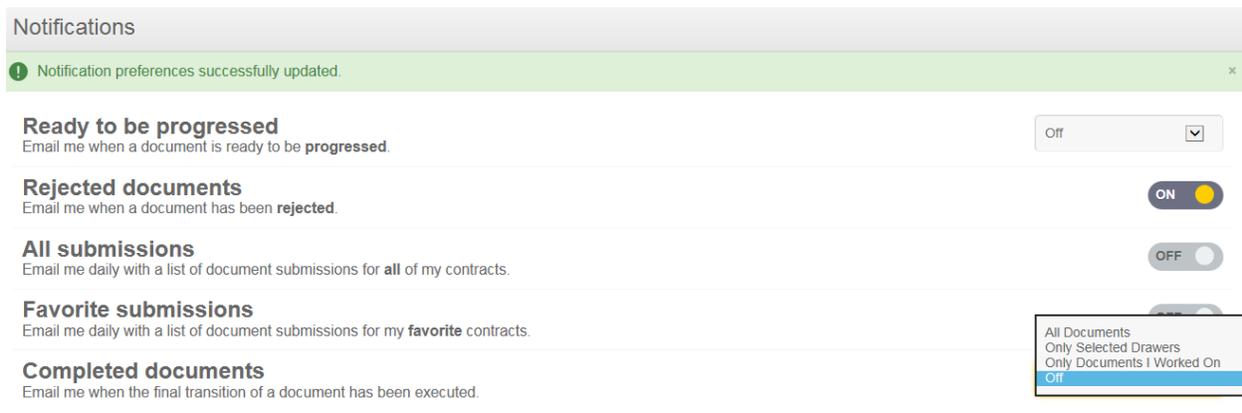


If you choose to no longer have any of the filter fields visible, click on the X below them and they will be hidden once again. The search field will remain visible.

NOTIFICATION –

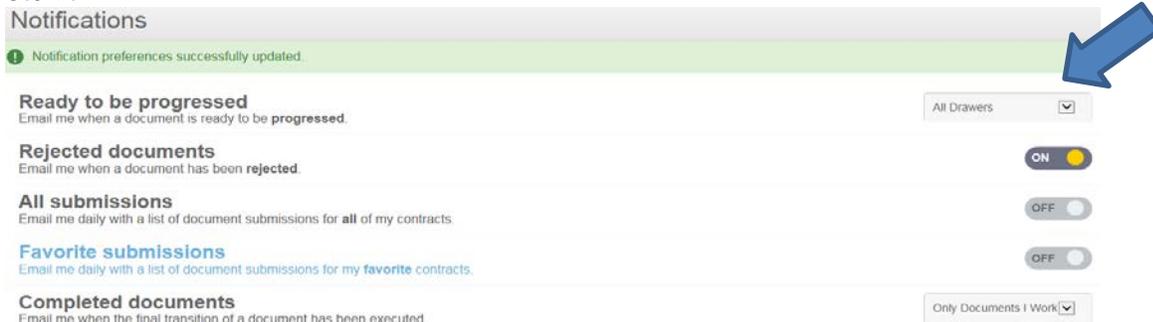
When a submittal is made, you have the option to be notified in real time for each drawer you choose. You also have a choice of receiving notifications when documents are rejected and/or also to be notified daily for either all submittals or only for submittals made to contracts marked as your favorite. These notifications are strictly your choice and can be changed as you wish. Realize these are global preferences which means you can't opt out for 1 contract and opt in for another. To find the location for notifications, click on Preferences (directly to the far right of the Doc Express header) and then Notifications. A screen as shown below will be displayed.

You can choose the specific drawers for which you want to be notified real time when a document within it is Ready to be progressed (top option) or when it is a Completed document (bottom option). Likewise, you can choose whether or not you want rejected notifications and/or daily notifications for all contracts or just those marked as your favorite.

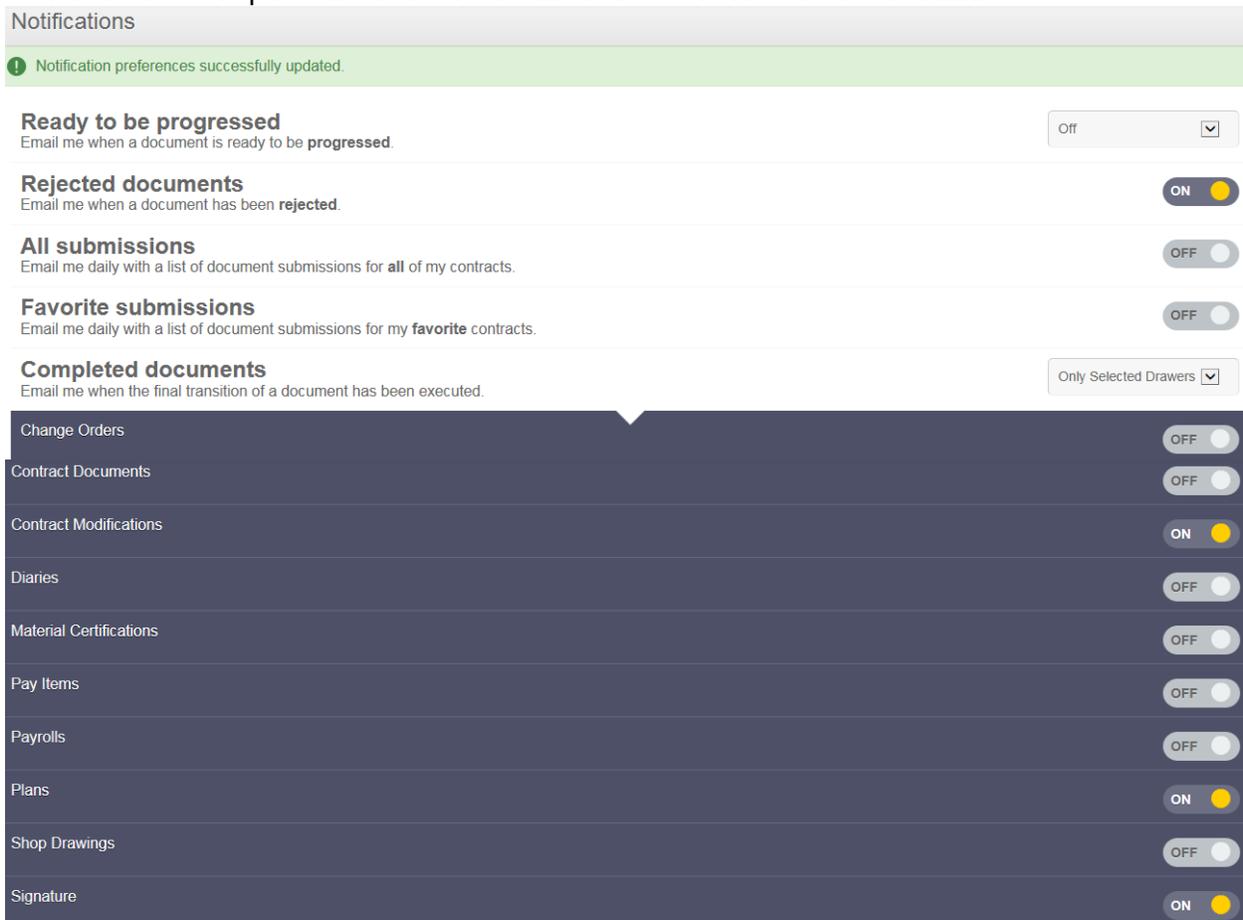


The graphic above shows that the option to receive real time notifications when a submittal is ready to be progressed is turned off for every drawer and contract. It also shows the options available for receiving notifications for the Completed documents option.

The graphic below shows that the option to receive real time notifications is turned on for every drawer and also turned on for receiving rejected notifications but not for summary reports. The Completed documents option is turned on for Only Documents I Worked On which means you'll be notified only if you had an active part in the document such as submitting, signing, receiving, etc. it



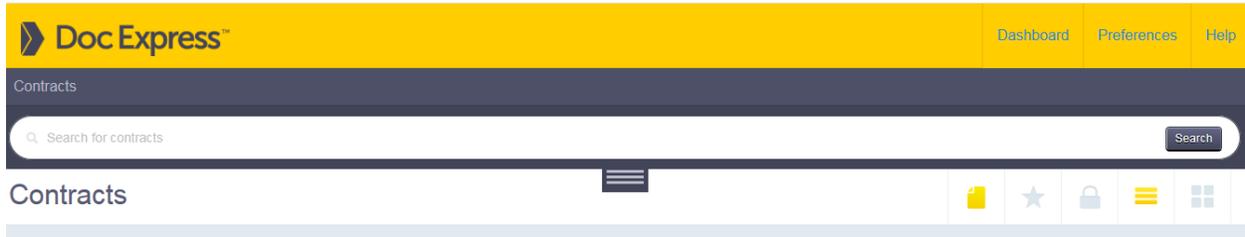
The following graphic shows that the option to receive real time notifications is turned off for every drawer for the Ready to be progressed option, turned on for the Rejected documents option but turned off for all other options except Completed documents where only the selected drawers have had the notification option turned on. All these choices can be changed at any time and from that point forward the notifications will reflect the new choices.



Once again, there is no right or wrong – these are strictly personal preference. What might be helpful to you might not be helpful to another user.

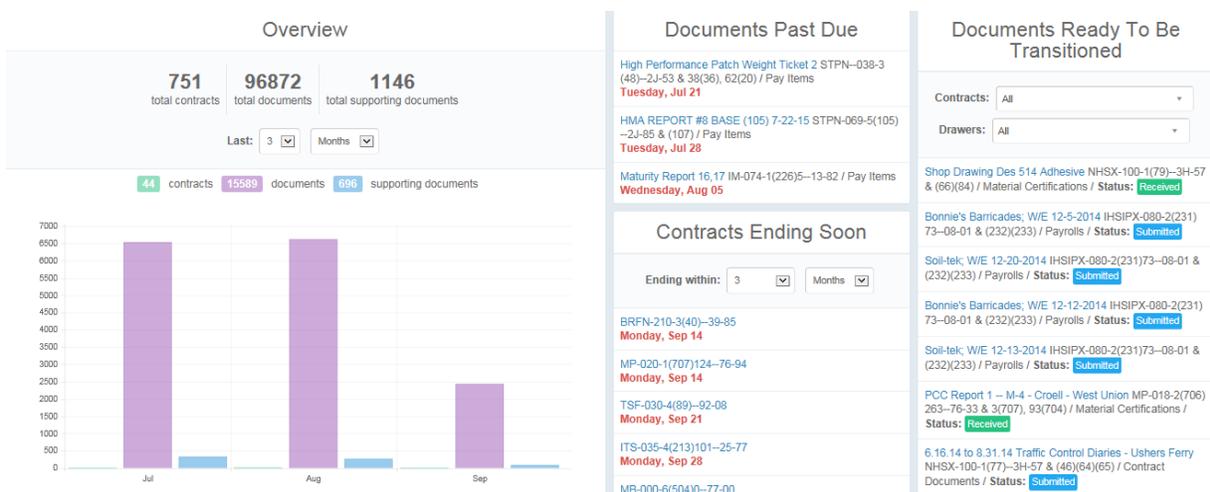
DASHBOARD –

In the upper right area of the screen when viewing the list of contracts, there is a Dashboard option. (see below)



If you click on Dashboard, a screen similar to the following will be displayed. Besides the numbers displayed, there are 3 lists –

- 1 showing all documents ready to be transitioned. This, by default, includes all documents in all contracts in your list that are not completed. Displayed along with the contract information is the status of the document – color coded, no less!! You can filter this list to a specific contract and/or drawer.
- 1 showing all documents that are past due. This list includes only those contracts/drawers/documents where a due date has been entered. More on due dates starting on Page 16
- The Contracts Ending soon option is what we're using to display the Late Start Date instead - you can determine the number of months to include



DRAWER STRUCTURE -

Contract Documents –

Holds all files in their appropriate type that are necessary for project files
The Submit process is typically done by a DOT user although others who have access to this drawer can also submit if appropriate.

A submittal can be linked simultaneously to 1 or more types in the drawer

The Receive process must be done by DOT personnel.

Pay Items (Formerly called Material Certifications) –

Holds files pertaining to pay items in the project

There are a few routine types listed first for every contract with the rest of the types being totally dependent on the pay items in the contract. Every item in the contract is included as a type in this drawer.

A submittal can be linked simultaneously to 1 or more types

The Submittal of documents can be done by any user (contractor, supplier, or DOT user) with access to the drawer

The Receive process of documents is typically done by the RCE Inspector but can be done by any DOT user.

The transition to Audited is done by the materials personnel in the DOT

Payrolls –

Holds payroll documentation required on Federal Aid projects

Submittals in this drawer are normally done only by the Prime Contractor

Submittals are made to the appropriate type, with the prime and each subcontractor having a type in this drawer

Prior to Receiving, the RCE Office Staff enters a remark in the Comments field that the payroll has been checked

The Receive process is done by the RCE Office Staff

Contract Modifications (Formerly called Change Orders) –

Holds the contract modifications that were created in FieldManager and submitted to this drawer to be signed.

Document is submitted by the RCE Office Staff

When the cont mod is initially submitted, the contractor will be notified of such so they can sign if they have their real time or summary notifications turned on for this drawer

With each additional signature, a notification is automatically sent to those who can transition the document to another level

Once the last required signature (DCE) or the last optional signature (Central Construction or FHWA) is obtained, they will be asked if they would like to mark the cont mod Completed. If no more signatures need to be obtained, they should answer “yes” and the contract modification will be changed to Completed. If more signatures are required, they should answer “no” and notifications will be sent as usual.

When the status is Completed in Doc Express, the cont mod should be approved in the FieldManager program

The cont mods remain in the Contract Modification drawer along with the log of activity and signatures.

Whether viewing or printing the cont mod, a Signature History page that displays, among other things, everyone who signed and when they signed is permanently attached.

Working –

Allows documents to be submitted, reviewed, modified, and re-submitted

PDF documents should not be submitted to this drawer since they can't be edited

Anyone can submit documents and begin the review process

Changing the submittal to Completed is done only by a DOT user

The Completed document is published (moved) to a drawer and type only by a DOT user where the document will have an initial status of Submitted.

The final iteration of the "Submitted" document just published should be Received by a DOT user.

All iterations of the document and the log of activity remain in the Working drawer with a status of Published.

Shop Drawings –

Allows shop drawings to be submitted, reviewed, modified, and re-submitted

The prime or the subcontractor submits drawings to begin the review process

Only DOT personnel (or a user acting on behalf of the DOT) can transition the status to anything other than Submitted

Each time the submittal's status changes or it is re-submitted, a notification is automatically sent to those with access to the drawer so they know the document is ready to be reviewed, and/or transitioned.

The final shop drawing submittal and all previous iterations of that document remain in the Shop Drawings drawer along with a log of all transitions.

Signature -

Normally a DOT user submits the document to be signed although there are a few cases where another user can also submit

Who signs is dependent on the form to be signed. Some forms will require only one signature and others will require multiple signatures

Even though there are lines for all potential signatures displayed on the signature page, every signature is not required for every form

The signed form remains in this drawer for the life of the contract

Plans –

The RCE Office is responsible to submit the "As Advertised" set of plans to this drawer

If there are any changes in the "As Let" set of plans from the "As Advertised" set, the Office of Contracts will submit them which will result in the new set being displayed on top.

As the plans are updated/changed after the letting, the RCE Office is notified and submits those updated plans so everyone has and is using the most current set of plans available

When the contract is finished, the most current set of plans should be Published to the Project Plans type in the Contract Documents drawer.

INITIAL SCREENS WHEN SUBMITTING A DOCUMENT

For the Pay Items Drawer

To submit a document, first select the contract and the Pay Items drawer and then click the Submit Document button. After you click the Submit Document button, the screen below is displayed.

The screenshot shows a web interface for submitting a document. At the top, a breadcrumb trail reads "Contracts / June Letting / Pay Items / New Document". Below this is a header bar with "New Document" on the left and a yellow "Save" button on the right. The main form area contains several fields: a required "Title" field, a "Types" dropdown menu with the text "Choose one or more document types", and an "Attachment" section with a "Browse..." button. Below the attachment section is a link "Enter text instead of attaching a document?". At the bottom of the form is a "Supporting Documents" section with a link "Add a supporting document?". A dark blue footer bar contains a checkbox and the text "By checking this box I am electronically signing the attached document."

Contract Documents, Payrolls, & Shop Drawing submittals –

The submittal screen for each of these drawers looks the same as above but without the signature line.

Working Drawer and Plans Drawer submittals –

As seen below, these drawers have no type or signature required when submitting a new document.

Contracts / June Letting / Working / New Document

New Document Save

* Title

Comment

* Attachment

[Enter text instead of attaching a document?](#)

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

Contract Modification Drawer submittals –

The original submittal screen for this drawer is the same as above except it has no option for text instead of a document submittal and it requires only a pdf file to be attached. While the original submittal does not require one, signatures are required following the initial submittal. They must enter their name as well as put a checkmark in the box.

Contracts / June Letting / Contract Modifications / New Document

New Document Save

* Title

Comment

* Attachment

Only PDF files are allowed in this drawer

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

Signature Drawer submittals -

This submittal screen is very similar to the Contract Documents and Shop Drawing drawers except for 2 things – (1) you cannot enter text instead of attaching a document and (2) only PDF files are allowed in the drawer.

New Document Save

* Title

Comment

* Types

Choose one or more document types

* Attachment

Only PDF files are allowed in this drawer

Supporting Documents
Add a supporting document?

Notice that in ALL submittal screens you have an option to add Supporting Documents. This is simply additional documentation for the original submittal. If there is Supporting Documents added, it will be displayed when viewing the list of documents for any given drawer.

VIEWING ALREADY SUBMITTED DOCUMENTS –

The prime contractor and DOT users can open and view every document that has been submitted to every drawer to which they have access. Subcontractors and suppliers; however, can open documents only if they have either submitted the document or been given permission to do so for the contract at the drawer level. Even if they can't open the document, they can still see the entire list of submittals.

When viewing the list of submittals, the top line of each submittal displays the title given to the document by the submitter and just to the right of that name, the type(s) in which the submittal has been placed. And, if the final status for the document hasn't been reached, there is an Update option where you can change the name of the title and adjust the type(s) to which the document has been linked. Just below that is the company responsible for the submittal. Below that is the due date if one was entered.

No one, including the submitter, can change the contents of the document while it is in Doc Express.

The "flag" with a number in it located just above the date reflects the number of transitions that have taken place for the submittal. In order to see the entire log, click the arrow on the right side of the screen under the status.

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

The screenshot shows a document titled "Minutes" with a status of "Submitted". The document is associated with "Iowa DOT" and has a category of "Preconstruction Meeting Information". There are buttons for "update", "Transition", and "Archive". A message indicates the document is now "overdue" with a due date of "Wednesday, May 20". Below this, there is a comment section with a "2" icon and the text "Add a new comment". A log entry shows a "Due Date Changed From Blank To 05/20/2015" on May 27, 2015, at 09:28 AM CDT, by "Iowa DOT - Janet Wastenev".

To the far right, in color, is the status of the submittal – the status options vary depending on the drawer and the access of the user. Below the status is a possible transition which is dependent on the current status of the submittal as well as the access of the user who is logged in to the program. For instance, if the status is Received, that’s the “end of the road” in most drawers. The Pay Items drawer; however, also has an Audited status following the Received status after which there will be no more possible transitions shown. However, if the status is, for instance, Rejected, then there is a transition option to Resubmit Document.

If the status is anything other than Submitted, there is an arrow below the status. By clicking on that arrow, the log of all transitions on the left side of the screen will be expanded. If the status is Submitted, the submittal shown on the left side of the screen is the only one so there is no arrow displayed. By default, the most current transition is always displayed with the rest “hidden” until the arrow expands the list. If the list is expanded, to hide all but the most current, simply click on the arrow once again.

DUE DATES –

You as a DOT user can enter a due date for a document you or anyone else submits in a drawer. **After the submittal is saved, you can enter and/or change a due date** by either clicking on Edit due date or by clicking on Update.

The screenshot shows a document titled "Shop Drawings" with a status of "Submitted". The document is associated with "Iowa DOT" and has a category of "Falsework for slab bridges". There are buttons for "update", "Submit Document", and "Actions". A message indicates the document is now "overdue" with a due date of "Wednesday, May 20". Below this, there is a comment section with a "1" icon and the text "Add a new comment". A log entry shows the document was "Submitted" on May 26, 2015, at 01:59 PM CDT, by "Iowa DOT - Janet Wastenev".

Either method will take you to the screen similar to what is shown below (this was for the Shop Drawings drawer) –

Update

*** Title**

Due date

Types

Save
Cancel

The due date can be changed as many times as needed. Each time it is changed that activity will be included in the log for that document. The due date and other details are displayed below the title of the document when viewing the submittals for a drawer.

try again Steel and aluminum pedestrian hand rails update
Submitted

prime [Transition](#) / [Archive](#)

try again is now **overdue**. The due date was **Monday, May 25** [Edit due date](#)

6 Add a new comment 2 Supporting Documents ▲

May 22 10:15 AM CDT **Submitted**
 ↓ try again (current version)
 2015 prime - prime 2014

May 22 10:12 AM CDT **Amend And Resubmit**
 ↓ 2nd cc
 2015 Iowa DOT - Janet Wastenev

May 22 10:04 AM CDT **Submitted**
 ↓ try again (version 2)
 2015 prime - prime 2014

May 22 10:02 AM CDT **Amend And Resubmit**
 ↓ updated
 2015 Iowa DOT - Janet Wastenev

May 22 09:57 AM CDT **Due Date Changed From Blank To 05/25/2015**
 Iowa DOT - Janet Wastenev

May 22 09:56 AM CDT **Submitted**
 ↓ try again (version 1)
 2015 original report form
 prime - prime 2014

As shown previously, the Dashboard contains a list of documents with past due dates for every contract to which you have access.

There is also a filter where you can select to see the order by due date with the most overdue listed first followed by others with a due date and lastly by those with no due date.

Contracts / IMN-080-3(175)119--0E-25 / Shop Drawings

Search for documents Search

All Statuses Document types

All Document Submitters From Submission Date To Submission Date

Most Recently Updated
 Most Recently Submitted
 Title (a-z)
 Due Date (most overdue first)

Today Since yesterday Within last 3 days Within 1 week Within 2 weeks Within 1 month
 Within 2 months Within 3 months

Reset search

CONTRACT DOCUMENTS DRAWER - SUBMITTAL & TRANSITIONS

Click on the Contract Documents drawer beside or below (depending on your choice of view) the appropriate contract. A list of all previously submitted documents are displayed with, by default, the most recently updated being at the top of the list. The order of the list can be changed by opening the filter section (clicking on the horizontal lines below the search field) and changing that option.

SUBMIT -

Click the Submit Document button and enter the appropriate information in the title field and then select the appropriate type(s). To select a type, put the cursor in that field and the list of types will automatically be displayed (a scroll bar is on the right to see additional types). You can multi-select types so if, for instance, a submittal should be linked to 2 types, you can select both types at once during this process.

New Document Save

* Title Comment

* Types

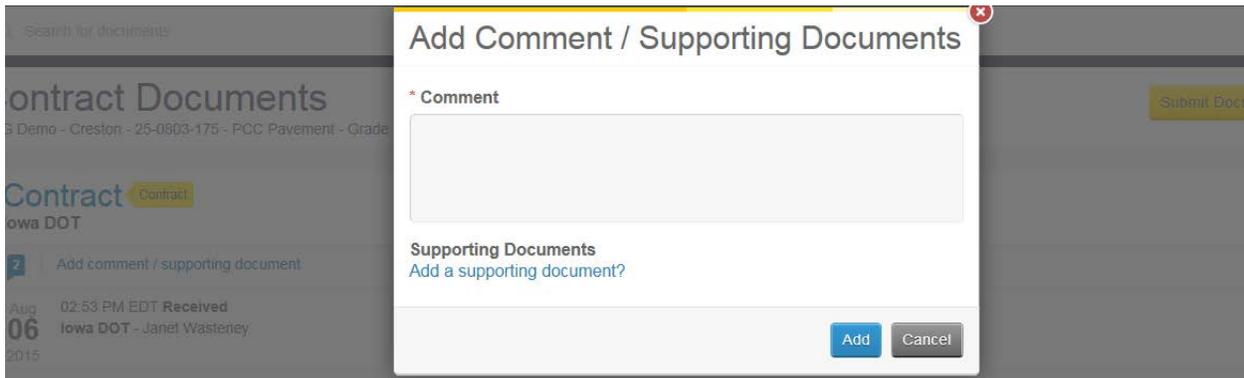
- Addendum
- Agreements for Private Property Used by Contractor (Construction Manual 2.26)
- Asbestos Abatement Report
- Clean Water Act Section 404 Permit
- Construction Pay Estimate
- Contract

Add Supporting Documents (additional documentation for the submittal), if desired.

Browse to the location of the attachment and select it. Make a comment in that field if desired and then click the Save button. Saving the document will return you to the list of submittals with this new one being at the top of the list.

At this point you as the submitter can remove the document if you wish. However, once any change is made such as a comment, the title changed or the submittal has been transitioned, neither you nor anyone else can delete it. However, if that does happen or it's received, etc., contact Dean or Janet and they can "archive" the document. Archiving the document doesn't delete it but actually hides it so it remains a part of the contract – but just is "out of sight, out of mind!".

If you or someone else wants to make an additional comment or add supporting documentation to this submittal, click Add a new comment and another window (shown below) will be displayed where you can enter and then add your comment.



Upon clicking the Add button, your comment becomes part of the record for this submittal and the number in the "flag" (just above the date) is increased by one.

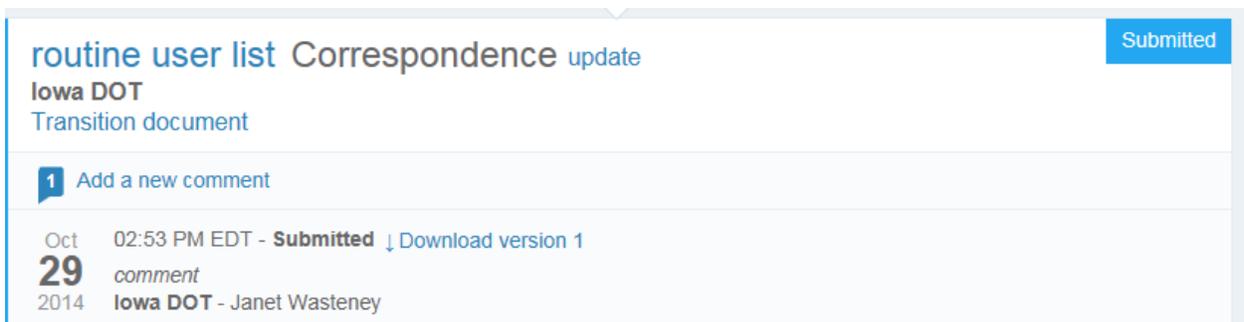
You have the option until the status is Received to change some parts of documents no matter who originally submitted them. For instance - -

- ** If the document was submitted to the wrong type in the drawer and/or should be added to another, you can move and/or add it to the appropriate type IN THE SAME DRAWER.

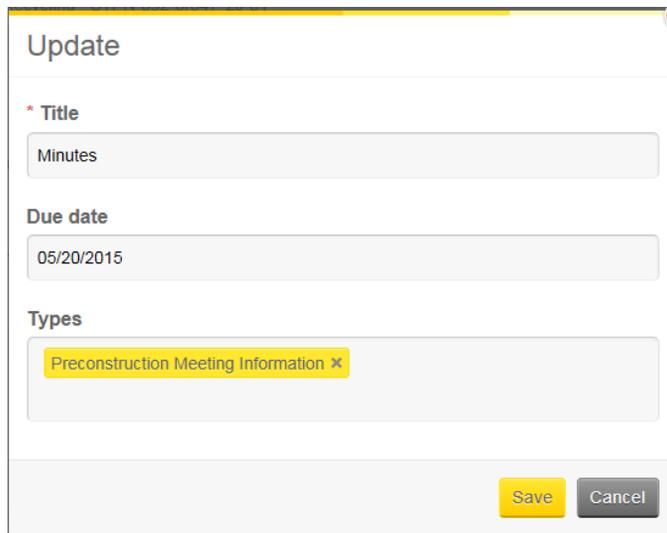
- ** If the title of the document is incorrect and should be changed, you can change it

- ** If the due date should be changed, you can change it

To do so, click on the word "update" just to the right of the type.



The following screen will be displayed where you can change the title of the document, change the due date, change, add to, or remove types for the submittal and then press the Save button.



The screenshot shows a web form titled "Update". It contains three main sections: "Title" with a text input field containing "Minutes"; "Due date" with a date input field containing "05/20/2015"; and "Types" with a dropdown menu showing "Preconstruction Meeting Information" and a close button (X). At the bottom right, there are two buttons: "Save" (yellow) and "Cancel" (grey).

As mentioned previously, no matter the status of the document, either Dean or Janet can “archive” any document. That process moves it from the normal list to a hidden list which can be viewed by opening the filter and changing from Hide Archived to Show Archived. To return to the entire list of submittals in the drawer, change the filter back to Hide Archived.

RECEIVE / REJECT

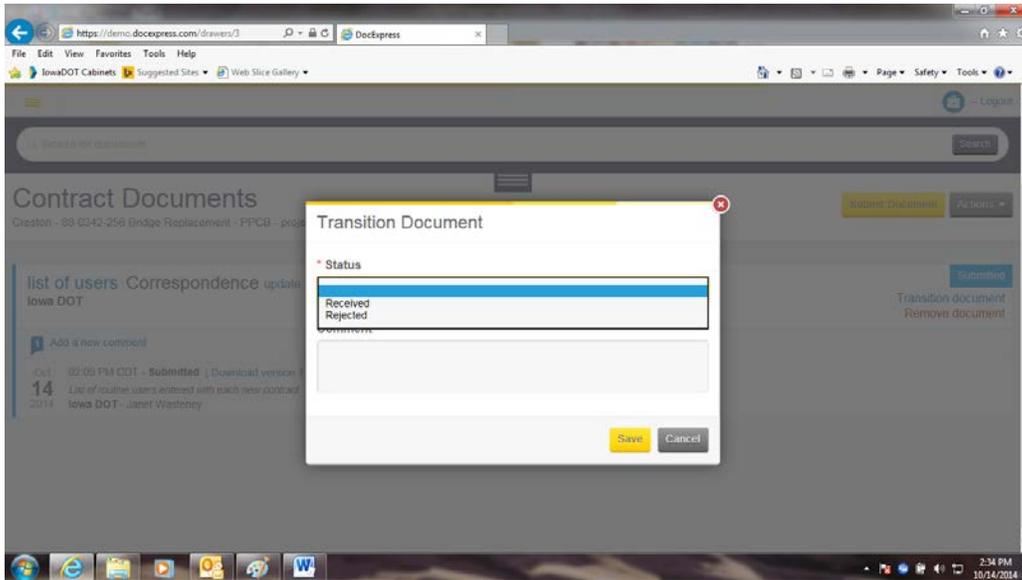
Prior to selecting the transition, you should open the document and view it to be sure it is correct. When you select Received, you are stating that you have looked at it and the submittal is correct and in the appropriate type. All is good! In some cases, you may very well be both the submitter and the receiver of the document.

If you look at the submittal and the document itself is not correct AND there has not been a comment made, you have some choices –

1. If you were NOT the submitter, reject the submittal – everyone with access to that drawer will automatically be notified of the rejection if they have that notification option on
2. Call the person who submitted the document and have them remove it and re-submit it correctly. Remember, this can only be done by the submitter if no comments or transitions have occurred.
3. If you were the submitter, remove the document and re-submit it correctly

Choosing which one to do can be dependent on a number of things such as the number of times an incorrect submittal has been made by that user. Bottom line, it's up to you as to which option you choose for an incorrect submittal. Just be sure to NOT Receive it if it's incorrect!!

If you want to either Receive or Reject the submittal and possibly make a comment during that process, click “Transition” (under the status). “Remove” is an option available only if you were the original submitter and there has been no comment made or transition done.



Once you select either Received or Rejected in the Contract Documents drawer and then click Save, the submittal is a “done deal” – no changing it or removing it. Upon “Save”, the screen reverts back to display the list of all the submittals made to date for that drawer, including this one.

LOG –



Above is an example of the submittal in a collapsed view. Notice the arrow to the far right of the submittal is pointed down. That means the submittal is being displayed in a collapsed view.

If the submittal had been linked to more than 1 type, all types would be listed following the title. In the example above, Correspondence is displayed and, if there was another type linked to this same submittal, it would be displayed following Correspondence.

Below is an example of the same submittal as shown in the previous graphic but with all transitions being displayed. When all the transitions are displayed, the arrow mentioned above is pointed up.

Contract Documents

Janet Training - 01-0923-034 HMA Resurfacing/Cold In-Place Recycling - STPN-092-3(34)--2J-01

Submit Document Actions

Outlook notes Correspondence

Iowa DOT

Add a new comment

Feb 13 02:56 PM EST Received
Iowa DOT - Jennifer Strunk
2015

Feb 13 02:56 PM EST Submitted
Download version 1
Iowa DOT - Jennifer Strunk
2015

Received

PAY ITEMS DRAWER - SUBMITTALS & TRANSITIONS

Click on the Pay Items drawer beside or below the appropriate contract. A list of all previously submitted documents to this drawer are displayed with, by default, the most recently updated being at the top of the list. The order of the list can be changed by opening the filter section (clicking on the horizontal lines below the search field) and changing the default of Most Recently Updated to a different choice.

SUBMIT -

Click the Submit Document button and enter a descriptive title that explains the document and then select the appropriate type(s). To select a type, put the cursor in that field and the list of types will automatically be displayed (a scroll bar on the right to see additional types). You can multi-select types so if, for instance, a submittal should be linked to 2 types, you can select both types at once during this process. The top few types in the drawer are the same for every with the rest of the types being totally dependent on the contract.

New Document Save

* Title

Comment

* Types

- Central Materials Input
- Contract Modification Item Certs
- District Materials Input
- Materials Acceptance Report
- Materials Source Report

By checking this box I am electronically signing the attached document.

Following the routine types, every pay item in the contract is listed. Those items are followed by “groupings” for HMA Items or PCC Paving or PCC Structure, if appropriate.

Add Supporting Documents (additional information for the submittal) if desired and also a comment if desired. Neither is required.

Before the submittal can be saved, you must electronically sign the document by checking the “box”. See below –

The screenshot shows a web form titled "New Document" with a yellow "Save" button in the top right corner. The form contains several fields: "Title" with the value "Norris Materials Source", "Types" with a dropdown menu showing "Materials Source Report", and "Attachment" with a file path "C:\Doc Express DOT Tra" and a "Browse..." button. Below these fields is a link "Enter text instead of attaching a document?". There is also a section for "Supporting Documents" with a link "Add a supporting document?". At the bottom of the form is a dark blue bar with a white checkbox and the text "By checking this box I am electronically signing the attached document."

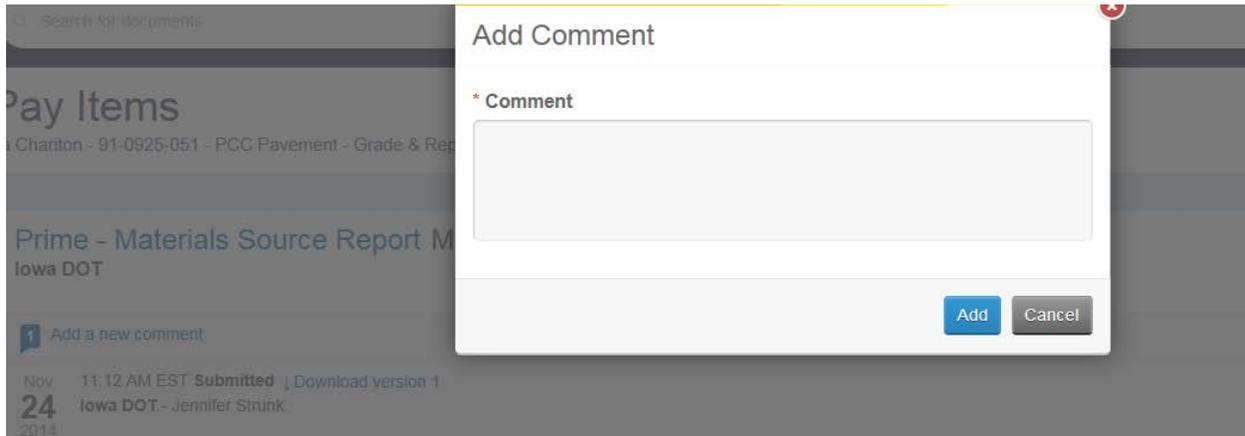
If you click the Save button without “signing” the submittal, the following screen will be displayed. If this happens, simply check the box for the signature and then click Save again.

This screenshot is identical to the previous one, but it includes a red error message at the top: "Signature agreement must be confirmed". The "Sign" checkbox at the bottom of the form is now checked.

Even after you have submitted and signed your approval, you (and ONLY you) because you were the submitter can remove the document if you wish. However, once an

additional comment is made by anyone or the submittal has been transitioned, neither you nor anyone else can delete it.

If you or someone else wants to make an additional comment to this submittal without transitioning it to Received or Rejected, click Add a new comment and another window (shown below) will be displayed where you can add your comment.



Upon clicking the Add button, your comment becomes part of the record for this submittal and the number in the “flag” (just above the date) is increased by one.

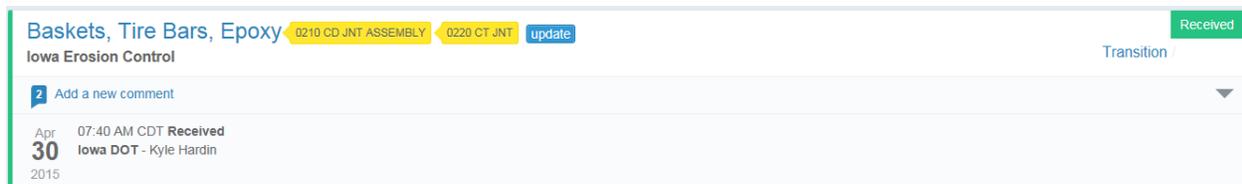
Until the status is Audited, you have the option to change some parts of documents no matter who originally submitted them. For instance - -

- ** If the document was submitted to the wrong type in the drawer and/or should be added to another, you can move and/or add it to the appropriate type IN THE SAME DRAWER.

- ** If the title of the document is incorrect and should be changed, you can change it

- ** If the due date should be changed, you can change it

To do so, click on the word “update” just to the right of the type.



The following screen will be displayed where you can change the title of the document, change or add a due date, change, add to, or remove types for the submittal and then press the Save button. So, in the example following, the type obviously does not match the title. By using the update option, you can correct that mis-match.

Update

* Title

Due date

Types

Save Cancel

As mentioned previously, no matter the status of the document, either Dean or Janet can “archive” any document. That process moves it from the normal list to a hidden list which can be viewed by opening the filter and changing from Hide Archived to Show Archived. To return to the entire list of submittals in the drawer, change the filter back to Hide Archived.

RECEIVE / REJECT -

Prior to selecting the transition, you should open the document and view it to be sure it is correct. When you select Received, you are stating that you have looked at it and the submittal is correct and in the appropriate type. All is good! In some cases, you may very well be both the submitter and the receiver of the document but only materials personnel should transition the document to the Audited status.

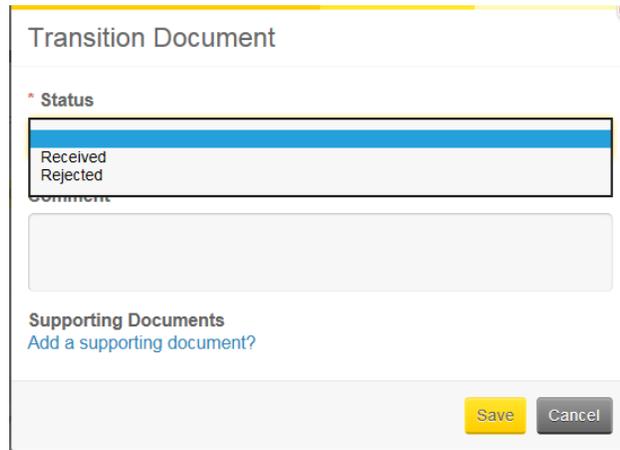
If you look at the submittal and it is not correct AND there has not been a comment made, you have some choices –

1. If you were not the submitter, reject the submittal – everyone with access to that drawer will be automatically notified of the rejection if they have that notification on
2. Call the person who submitted the document and have them remove it and re-submit it correctly. Remember, this can only be done if no comments or transitions have occurred.
3. If you were the submitter, remove the document and re-submit it correctly

Choosing which one to do can be dependent on a number of things such as the number of times an incorrect submittal has been made by that user. Bottom line, it's up to you as to which option you choose for an incorrect submittal. Just be sure to NOT Receive it if it's incorrect!!

If you want to either Receive or Reject the submittal and possibly make a comment during that process, click “Transition” (under the status). “Remove” is an option available only if you were the original submitter and there has been no comment made or transition done.

If you want to attach a file when you transition this document, browse to that location in the field under Supporting Documents before clicking the Save button.

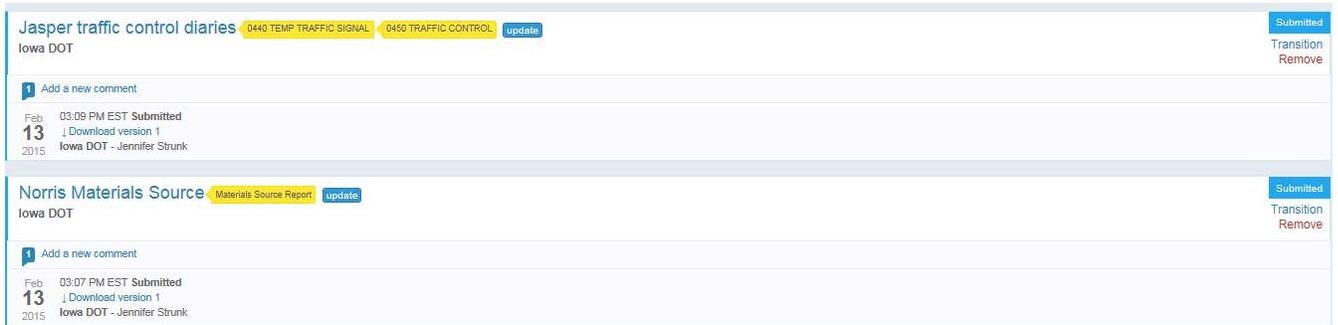


The image shows a 'Transition Document' form. At the top, it says 'Transition Document'. Below that is a section for '* Status' with a dropdown menu showing 'Received' (highlighted) and 'Rejected'. Underneath is a 'Comment' field with a text area. Below the comment field is a section for 'Supporting Documents' with a link 'Add a supporting document?'. At the bottom right are 'Save' and 'Cancel' buttons.

Once you select either Received or Rejected and then click Save, the screen reverts to a screen where it's displayed with a list of all the submittals made to date for that drawer. The submittal can be but isn't required to be transitioned to the Audited status.

LOG -

See below a graphic with the submittals in the collapsed view (showing only the most current action) -



The image shows a list of submittals in a collapsed view. The first entry is 'Jasper traffic control diaries' with tags '0440 TEMP TRAFFIC SIGNAL' and '0450 TRAFFIC CONTROL', and an 'update' button. It is submitted by 'Iowa DOT' on Feb 13, 2015, at 03:09 PM EST. The second entry is 'Norris Materials Source' with a tag 'Materials Source Report' and an 'update' button, also submitted by 'Iowa DOT' on Feb 13, 2015, at 03:07 PM EST. Both entries have 'Submitted' status and 'Transition' and 'Remove' options.

To see all activity for a given submittal, click the down arrow (under the status button) and every transition will be displayed for that specific submittal.

If the submittal is linked to more than 1 type, all types are listed following the title. In the example above, Materials Source Report is displayed in one submittal and Traffic Control Diary is displayed in the other. Notice that the Traffic Control Diary submittal is linked to 2 different items. One of those linked to the traffic control diary submittal

shouldn't be included so it can easily be removed by clicking on the Update button and a screen as shown below will be displayed.

Update

* Title
Jasper traffic control diaries

Due date

Types
0450 TRAFFIC CONTROL x 0440 TEMP TRAFFIC SIGNAL x

Save Cancel

Simply click the “x” beside the incorrect link. That link will disappear and then click the Save button. When you see the list of submittals, only the one you want will be shown – as seen below.

Jasper traffic control diaries 0450 TRAFFIC CONTROL update Submitted Transition

Iowa DOT

2 Add a new comment

Feb 13 03:14 PM EST Types Revised
Iowa DOT - Jennifer Strunk
2015

AUDITED STATUS –

The Audited status is for the use of materials personnel only. The intent is so they can know which submittals they have already reviewed and approved (audited) throughout the life of the contract rather than waiting until the end of the work and checking all items at that time. Using the Audit button is optional, not required.

The Audited status is only available if the submittal has a status of Received. Notice that there is still a Transition document option in the graphic below even though the submittal has been Received.

Poles and Fixtures.pdf 0210 LIGHTING POLE update Received Transition

Wicks Construction

2 Add a new comment

Jul 29 02:16 PM EDT
Received
Iowa DOT - Seth Woodcock
2014

By clicking the Transition document under the Received status, the following screen will be displayed.

Transition Document

*** Status**

Audited

Rejected

Comment

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

Save
Cancel

Notice there is also a Rejected status option. The materials people can mark the item as being rejected even though someone prior to them Received it. If the Rejected status is used at this point, there definitely needs to be a comment made and there also needs to be communication between the person who originally Received it and the person who is now rejecting it.

If you want to attach a file when making a transition, click on “Add a supporting document?” and browse to the location of the file.

If you want to transition several submittals to Audited at the same time, click on the Actions button and select “Transition to Audited” which will limit the list to only those documents with a Received status.

Pay Items

MP-163-5(701)34-76-63& 63(706) - Chariton - 63-1635-701 - PCC Patching

Transition to Audited
Cancel

! You can transition many documents at once:

- From the list below select each document you would like to transition
- Click **Transition to Audited**

Baskets, Tire Bars, Epoxy 0210 CD JNT ASSEMBLY 0220 CT JNT Received

Iowa Erosion Control

2 comments

Apr 30 07:40 AM CDT Received
Iowa DOT - Kyle Hardin
2015

Cure 0230 PATCH, FULL-DEPTH FINISH, BY AREA 0240 PATCH, FULL-DEPTH FINISH, BY AREA(=>50 FT) Received

Iowa Erosion Control

0 comments

DOT (OCT, 2015) - 28

Click in the circle just to the left of the document for each submittal you want to transition to Audited and then click Transition to Audited. All selected will be transitioned to Audited.

Pay Items Transition to Audited Cancel
MP-163-5(701)34--76-63& 63(706) - Chariton - 63-1635-701 - PCC Patching

1 You can transition many documents at once:
1. From the list below select each document you would like to transition
2. Click **Transition to Audited**

Baskets, Tire Bars, Epoxy 0210 CD JNT ASSEMBLY 0220 CT JNT Received
Iowa Erosion Control

2 comments

Apr 30 07:40 AM CDT Received
Iowa DOT - Kyle Hardin
2015

Cure 0230 PATCH, FULL-DEPTH FINISH, BY AREA 0240 PATCH, FULL-DEPTH FINISH, BY AREA(=>50 FT) Received
Iowa Erosion Control

If the Audited option is used, the status will reflect that when viewing the list of submittals in the Material Certifications drawer – as seen below – and no other transitions can be made. It's a done deal!!

Poles and Fixtures.pdf 0210 LIGHTING POLE Audited
Wicks Construction

3 Add a new comment

Nov 24 11:47 AM EST Audited
Iowa DOT - Jennifer Strunk
2014

CONTRACT MODIFICATIONS DRAWER - SUBMITTALS & TRANSITIONS

Contract modifications are created in the FieldManager program but instead of printing a hard copy and sending to the contractor for signature, they are instead printed to a pdf file and submitted by the RCE Staff to the Contract Modification drawer in Doc Express where they will obtain the required signatures.

SUBMIT -

ONLY PDF files can be submitted to the Contract Modifications drawer. If any other type of file is submitted, you will receive an error message stating such.

You can add Supporting Documents (additional information for the submittal) if desired and/or a comment either at the time of the submittal or at any transition. Neither is required.

No signature is required when the cont mod is initially submitted to the drawer. Only the contractor will receive a notification when a cont mod is initially submitted since the first

required signature is the prime contractor. After the prime signs, others with access to the drawer will receive the notifications that signatures are needed or have been obtained.

Contracts / NHSX-018-5(149)-3H-17 / Contract Modifications / New Document

New Document Save

* Title

Comment

* Attachment Browse...

Only PDF files are allowed in this drawer

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

All screens following the initial submittal (shown above) are different from most of the other drawers due to both the required written signature and the checkmark when the user signs the document during each transition after the initial submittal. All signatures become part of the document when both viewed and printed.

Shown below is the screen displayed after the initial submittal and prior to the last required signature. The status option (shown below as “Recommended by Resident Engineer”) is dependent on who is next to sign the cont mod.

Transition Document

* Status
Recommended by Resident Engineer

Comment

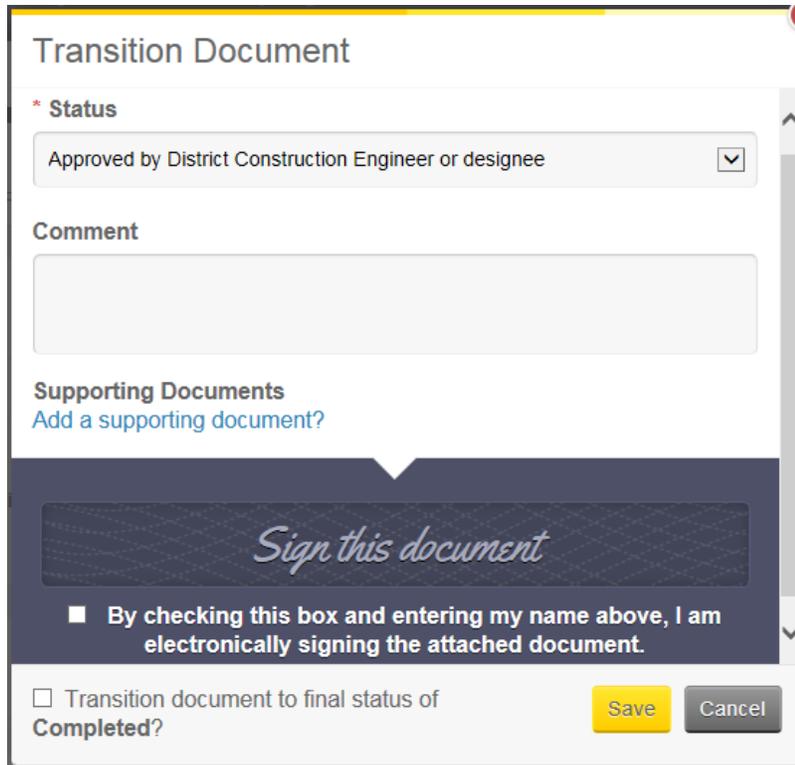
Supporting Documents
[Add a supporting document?](#)

Janet Wastenev

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

Save Cancel

In all transitions, the name that is typed in as the signature **MUST** match **EXACTLY** the name of the user logged into the program at that time. In the case above, if I had entered, for example, Jan Wastenev or janet wastenev, neither would have been accepted since neither matched exactly the name of the user as per my log in name. The login and signature are case sensitive.



Transition Document

* **Status**

Approved by District Construction Engineer or designee

Comment

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

Sign this document

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

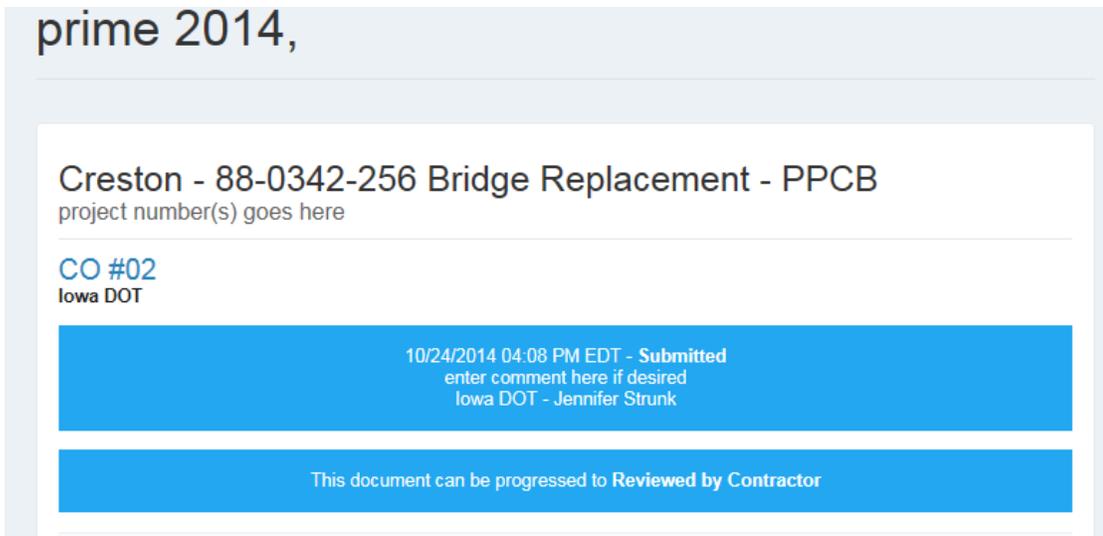
Transition document to final status of **Completed?** Save Cancel

When the last required signature is obtained, the user is asked if the contract modification should be marked Completed. If it should be transitioned to Completed, they should put a checkmark in that box and the status will automatically change to Completed. When the document is marked Completed, no more signatures are allowed and a notification is sent stating the submittal has been completed. If it should not be marked Completed, the notifications are sent as usual and transitions (signatures) should continue.

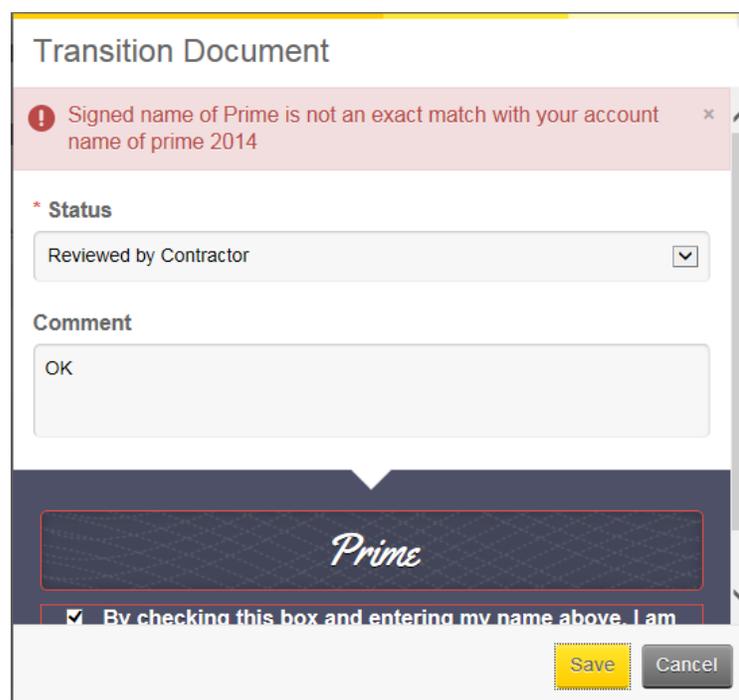
After each optional signature is obtained, the user is asked if the status should be changed to Completed. If “yes” (they put a checkmark in the box), the status will automatically change to Completed and no more signatures are allowed. In either case, notifications are sent.

When the cont mod is marked Completed, it is considered approved and should be marked as such in the FieldManager program.

Notifications are sent unless the user has opted out of receiving them. Below is a sample notification alerting the user that a signature is needed.



In the notification sample above, the prime’s contractor’s name is prime 2014. It is now the prime’s responsibility to look over the cont mod and then enter their signature. Once they do so, a notification is sent to others needing to sign the cont mod. Remember, if a name is entered incorrectly in the signature field, a message similar to the following will be displayed. To correct, in the signature field simply enter the correct name as shown in the message.



The transition options are totally dependent on who (what level) is signing the document. The following graphic shows the transition options available for the contractor.

The screenshot shows a web form titled "Transition Document". At the top, there is a section labeled "* Status" with a dropdown menu. The dropdown menu is open, showing two options: "Reviewed by Contractor" (highlighted in blue) and "Rejected". Below the dropdown is a large, empty text input field. Underneath that is a section titled "Supporting Documents" with a link that says "Add a supporting document?". At the bottom right of the form are two buttons: "Save" (yellow) and "Cancel" (grey).

Notice the Supporting Documents field. A file can be “attached” to the contract modification at any time. This file will remain in Doc Express as a permanent part of the contract modification.

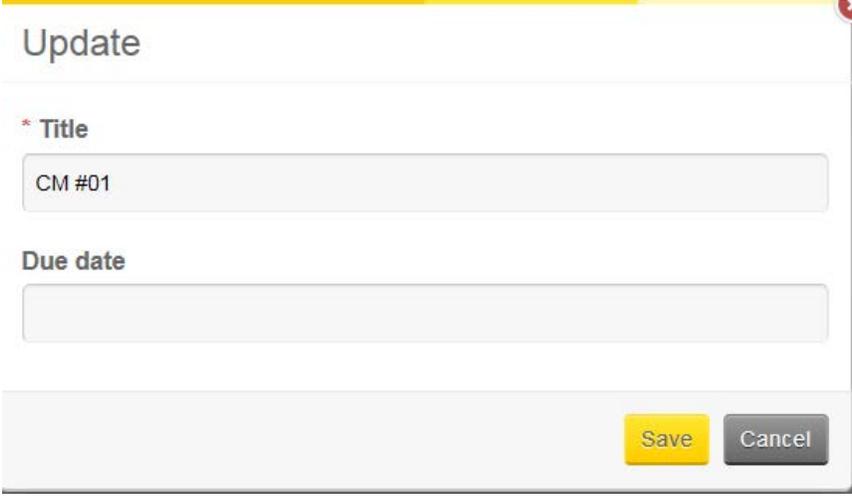
If the contractor selects Rejected, everyone, unless they have opted out of the notification, will receive notice that the cont mod has been rejected. Even though comments are optional, they are highly recommended when the Rejected option is selected.

If the contractor selects Reviewed by Contractor, they must sign and check the box (shown below) before clicking the Save button since they are giving their approval to have the cont mod advance to the next signature. They also have the option to add Supporting Documents of they wish. **All users with access to the drawer can see all Supporting Documents.** Comments are optional.

The screenshot shows the same "Transition Document" form, but with the status dropdown set to "Reviewed by Contractor". Below the dropdown is a "Comment" section with a large text input field. Underneath is an "Annotations" section with a "Browse..." button. At the bottom of the form is a dark blue box with the text "Sign this document" in a cursive font. Below that is a checkbox with the text: "By checking this box and entering my name above, I am electronically signing this document." At the bottom right are "Save" and "Cancel" buttons.

Once the contractor has signed and saved the cont mod, a notification is automatically sent to others with access to that drawer. The RCE will be the next required to sign the cont mod.

Similar to other drawers, you do have the option to change the title of the submittal if it's incorrect or add/change the due date. To do so, click on the word "update" just to the right of the type and make the appropriate title change in the update screen (shown below).



The image shows a screenshot of a web application window titled "Update". The window has a white background and a thin grey border. At the top left, the word "Update" is displayed in a grey font. Below this, there are two main sections. The first section is labeled "* Title" in a bold grey font, followed by a text input field containing the text "CM #01". The second section is labeled "Due date" in a bold grey font, followed by an empty text input field. At the bottom right of the window, there are two buttons: a yellow "Save" button and a grey "Cancel" button.

As stated previously, the options when clicking the Transition button are totally dependent on the person's role that is making that transition.

The DCE is the last required person to sign. If no other signatures are needed for the cont mod, they should put a checkmark in the "Transition document to final status of Completed?" when they sign.

If you are the **last optional signature (Central Construction or FHWA) to sign the cont mod, be sure you put a checkmark in the "Transition document to final status of Completed?" when you sign.**

This is very important so users will receive notification that the cont mod has a status of Completed which means it can and should be marked as Approved in the FieldManager program.

The expanded log of activity for the cont mod is easily accessible by clicking the down arrow on the right side of the screen, directly across from the submittal. Every transition, including the date, time, person responsibility, and more will be listed. To see only the most recent transition, click the arrow again and the list will be collapsed. Following is an expanded list. .

Nov 24 2014	12:19 PM EST Reviewed By Fhwa reviewer1 - Reviewer1 2014
Nov 24 2014	12:18 PM EST Reviewed By Central Office Iowa DOT - Test Central
Nov 24 2014	12:15 PM EST Reviewed By District Construction Engineer Iowa DOT - Test dce
Nov 24 2014	12:05 PM EST Reviewed By Resident Engineer Iowa DOT - Tester RCE
Nov 24 2014	12:01 PM EST Reviewed By Contractor prime - prime 2014
Nov 24 2014	11:53 AM EST Submitted Download version 1 Iowa DOT - Jennifer Strunk

When viewing and/or printing the document, the signature history page is included. The Doc Express Document Signing History page automatically becomes part of the cont mod once the first signature has been obtained in Doc Express. As signatures are obtained, the names and dates are added to the appropriate level. A sample of a signature page is on the following page.

When the cont mod is marked Completed in Doc Express, the status of that same cont mod should be changed to Approved in the FieldManager program.

Doc Express Document Signing History

Contract: August Letting Document: CO #01

Date	Electronically Signed By
12/02/2014	prime 2014 prime (Reviewed by Contractor)
12/02/2014	Tester RCE Iowa DOT (Reviewed by Resident Engineer)
12/02/2014	Test dce Iowa DOT (Reviewed by District Construction Engineer)
12/02/2014	Test Central Iowa DOT (Reviewed by Central Office)
12/02/2014	Reviewer1 2014 reviewer1 (Reviewed by FHWA)

PAYROLLS DRAWER – SUBMITTALS & TRANSITIONS

Subcontractors send their payrolls to the prime contractors as they have always done. The prime checks them, signs them, and then submits them to Doc Express. Only the prime contractor is to submit payrolls to the Payrolls drawer. It is the responsibility of the assigned DOT users to spot check and Receive the payrolls submitted to this drawer.

If a payroll is incorrect for whatever reason, you should reject it so the submitter can re-submit it correctly as a revised submittal. If you reject, everyone, unless they have opted out of the notification option, with access to this drawer will be notified by e-mail that it was rejected.

As per the Construction Manual, “It’s important to review the first 3-4 payrolls received from contractors and subcontractors carefully to be sure information is complete and

accurate. Once it is apparent that wage rates used are appropriate, it is not necessary to check each line of each payroll. However, occasional spot checks should continue to be made, paying particular attention to new crafts listed.”

Since not every payroll needs to be checked, in the Comment field there should be a comment made stating they were checked and by whom for each payroll checked. This can be done at the time the status is changed to Received.

It must be obvious when looking at the submittals which payrolls were checked and which were not. Notice in the first payroll submission below – the “checked by Jen” comment is just below the time and status of the submittal so it’s easy to see that it has been checked. No such comment was made in the other payroll displayed so it is assumed that it was not checked.

The screenshot shows a 'Payrolls' section for 'Creston - 88-0342-256 Bridge Replacement - PPCB'. It lists two items:

- PR #01 Sub A prime**: Status is **Received**. A comment from 'Iowa DOT - Jennifer Strunk' on Oct 27, 2014, at 12:38 PM EDT states 'checked by Jen'.
- PR #01 Sub B update prime**: Status is **Submitted**. It includes a 'Transition document' link and an 'Add a new comment' button. A comment from 'prime - prime 2014' on Oct 27, 2014, at 12:37 PM EDT is visible, with a 'Download version 1' link.

Even though the prime contractor submits all the payrolls to this drawer, you do have some options to change some parts of documents until they have a Received status. For instance - -

- ** If the document was submitted to the wrong type in the drawer, you can move it to the appropriate type **IN THE SAME DRAWER**.

- ** If the title of the document is incorrect and should be changed, you can change it

- ** If the due date should be changed, you can change it

To do any of the above, click on the word “update” just to the right of the type and make the appropriate changes.

Receive/Reject -

Prior to selecting the transition, you should open the document and view it to be sure it is correct. When you select Received, you are stating that you have looked at it and the submittal is correct and in the appropriate type. All is good!

If you look at the submittal and it is not correct, you should reject it and have the submitter re-submit it correctly, “overwriting” the original submittal. The week ending date and/or payroll number will be the same since you’re simply overwriting the original but you should enter “revised” or “corrected” in the comments. As stated previously, if you reject, everyone, unless they have opted out of the notification option, with access to this drawer will be notified by e-mail that it was rejected.

If you accidentally Receive a submittal that was wrong, contact Dean or Janet to “hide” that document and then contact the contractor to resubmit it correctly.

The image shows a web form titled "Transition Document". It features a dropdown menu for "Status" with "Received" selected. Below it is a "Comment" text box. There is a "Supporting Documents" section with a link "Add a supporting document?". At the bottom right, there are "Save" and "Cancel" buttons.

You may also attach Supporting Documents to the payroll by using the Browse button and going to its location prior to clicking the Save button.

Once you select either Received or Rejected and then click Save, the screen reverts to a screen where this payroll is included with a list of all the other submittals made to date in the Payrolls drawer.

WORKING DRAWER – SUBMITTALS & TRANSITIONS

The intent of this drawer is for documents that may be submitted, updated, re-submitted, changed again, re-submitted, etc. until the final iteration is obtained. At that point, the final document is published by a DOT user to a specific drawer and type where it will initially have a status of Submitted. The same or a different DOT user will change the status in the new location to Received and the submittal will remain in that location for the life of the contract. All iterations of the document remain in the Working drawer.

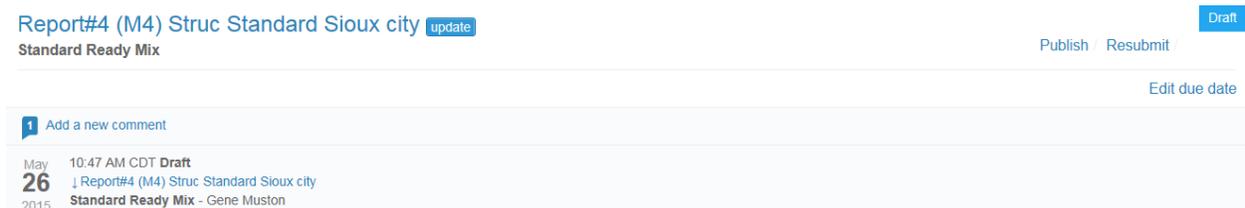
SUBMIT -

Anyone can submit a document to this drawer and any user can update the document and re-submit it. A log of every transition is maintained along with the date/time/user name, etc

The original submittal screen (shown below) is similar to others but there is no type field since there are no types for this drawer. Notice there is an option to add Supporting Documents (additional notes, documents, etc.) for the submittal.



The document shown below was submitted by user Gene and has a status of Draft. Notice that the option to Remove isn't available since I'm not logged into the program as him. I can, however make changes to the document and then Resubmit it or Publish the document (meaning to save it to a final location – drawer and folder).



Assuming they haven't opted out of receiving the notifications, others with access to this drawer will receive notification when a submittal has been made. Anyone with access to the drawer can copy the submittal to their hard drive, make changes, and re-submit it to this same location in Doc Express. Even though the document itself may be changed, the title of the submittal remains the same unless it's changed through the update process.

Unlike several of the other drawers, if you click Update (just to the right of the document's title) the only option you have is to change the title of the submittal and due date.

Update

* Title

Report#4 (M4) Struc Standard Sioux city

Due date

Save Cancel

That title will remain for all iterations of the submittals and also when the document is published to its final location in the appropriate drawer and type.

To look at and potentially change the document itself, open it by either clicking on the title or the most current Download version number and saving to a location of your choice. (If you click on the title, it will display the most current Download version.) Copy the document to a location of your choice, perhaps on your hard drive. After making the changes/updates as needed to that copy, save it, and then click the Resubmit document option for that submittal in Doc Express. Browse to the appropriate location of the updated document and enter a comment if you wish.

Resubmit Document

* Attachment

Browse...

Enter text instead of attaching a document?

Comment

Save Cancel

Click the Save button and this updated document will become the top submittal shown in the log. The log will include all documents submitted as well as the date/time/user details.

Notice in the following graphic that the document shown was submitted and revised multiple times.

STRUC FM RPT 01 STANDARD RM

Standard Ready Mix

Published

Archive

4 Add a new comment

May 14 02:11 PM CDT **Published**
Iowa DOT - Jeff Marienau
2015

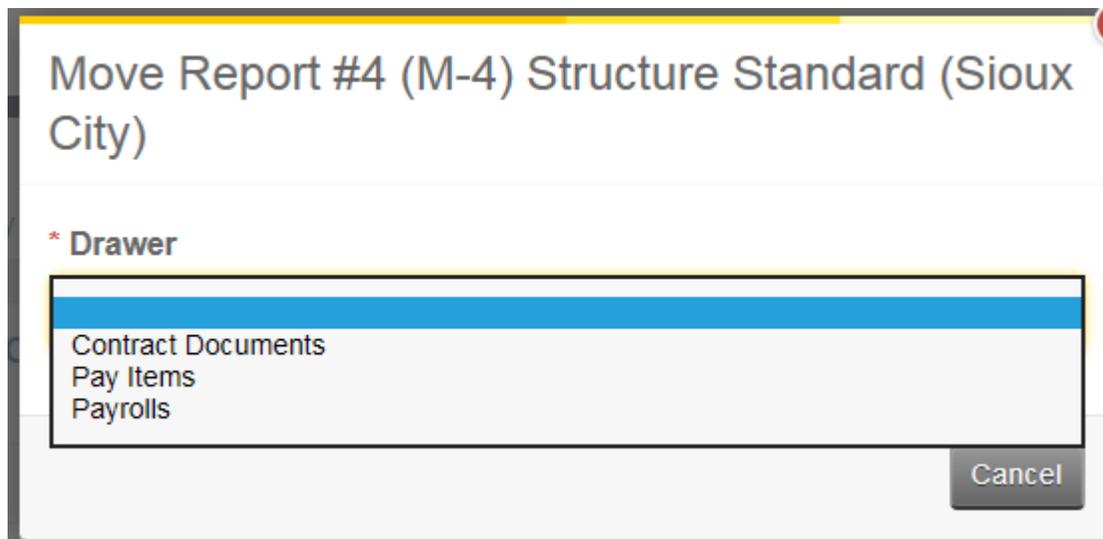
May 14 02:10 PM CDT **Draft**
↓ STRUC FM RPT 01 STANDARD RM (current version)
Iowa DOT - Jeff Marienau
2015

May 14 02:08 PM CDT **Title Changed From Report #1 Struct (Fm) Standard (Sioux City) To Struc Fm Rpt 01 Standard Rm**
Iowa DOT - Jeff Marienau
2015

May 11 01:35 PM CDT **Draft**
↓ STRUC FM RPT 01 STANDARD RM (version 1)
Please let me know if anything is wrong. Thank you.
Standard Ready Mix - Gene Muston
2015

Once the document's final iteration has been determined, a DOT user should Publish the document to the chosen drawer and type where it will automatically have a status of Submitted. A DOT user should then transition the status in that new location to Received. The final iteration of the submittal will remain in this drawer/type for the life of the contract. All iterations as well as the log of activity will remain in the Working drawer.

Only DOT users are allowed to Publish the document. To do so, click Publish document and then select the drawer



Once the drawer has been selected, then select the appropriate type within the drawer as shown following and make a comment if desired before signing by putting a checkmark in the signature line and then clicking the Save button.

Move Report #4 (M-4) Structure Standard (Sioux City)

*** Drawer**

Pay Items ▼

Types

Choose one or more document types

Comment

By checking this box I am electronically signing the attached document.

Save **Cancel**

Upon saving to the new location, the document's status in the Working drawer automatically changes from Draft to Published (see example below for a different submittal). Also upon saving, the document is located in the new drawer and type selected where it has a status of Submitted. As stated previously, a DOT user should Receive the submittal in the new drawer/type.

STRUC FM RPT 01 STANDARD RM Published

Standard Ready Mix Archive

[Add a new comment](#)

May 14 02:11 PM CDT **Published**
Iowa DOT - Jeff Marienau
2015

SHOP DRAWINGS DRAWER – SUBMITTALS & TRANSITIONS SUBMIT –

The Shop Drawings drawer workflow immediately follows this section
SUBMIT -

DOT users do not submit the initial shop drawing. Either the prime or the subcontractor can submit drawings to this drawer. **The naming convention to be used by the contractor for a submittal to the Shop Drawings drawer is as follows – paren number of the PROJECT (not necessarily the contract in case of tied projects) followed by the design number (if applicable) followed by a description of the submittal.**

A DOT user or a user acting on behalf of the DOT transitions the document, including making corrections and submitting a marked up submittal during the transition process.

Multi-selecting from the list of types in this drawer is an option just the same as it is in all the other drawers. Whether the shop drawing is linked to 1 or many types, the process is the same.

Only the original submitter has the option to Remove the document – **the graphic below is simply an example and not intending that a DOT user initially submits the shop drawing.**



The screenshot shows a document titled "test - submit by janet" with a yellow tag "Steel and aluminum pedestrian hand rails" and an "update" button. The document is from "Iowa DOT" and has a status of "Submitted". Action buttons include "Transition", "Archive", "Remove", and "Edit due date". A comment section shows one comment from "Iowa DOT - Janet Wasteneey" dated "Apr 22 2015" at "01:48 PM CDT" with the text "test - submit by janet".

Unless they have opted out of receiving them, a notification is sent to those who have access to the Shop Drawing drawer as soon as a submittal has been saved. Whoever should review the drawing submitted by the prime or sub can open it for review by clicking on the title or the (current version).

To transition, click the word Transition and select the appropriate status. If changes should be made, the user can save the document to a location of their choice, “mark up” the submittal and then click on “Add a supporting document” (which would be the marked up copy you created in the preceding step). Enter a comment if desired and then click. There is no limit as to the number of submittals and transitions that can be done for a drawing.

If you choose to enter a due date for the drawing to be resubmitted, click either the Update button or “Edit due date”.

Update

*** Title**

Due date

Types

The due date reminder is displayed on the left side of the screen below the submittal's title. (See below)

Shop Drawings Submit Document Actions

IMN-080-3(175)119-0E-25 - Creston - 25-0803-175 - PCC Pavement - Grade & New

try again Steel and aluminum pedestrian hand rails update Submitted

prime Transition / Archive

try again is now **overdue**. The due date was **Monday, May 25**. Edit due date

6 Add a new comment 2 Supporting Documents ✉

May 22 10:15 AM CDT Submitted
 ↓ try again (current version)
 2015 prime - prime 2014

The document's log includes every due date entered and/or revised as well as every transition that occurred.

Clicking on the title displays the latest version The title does NOT display the Supporting Document(s) that have been submitted.

Transition Document

*** Status**

Comment

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

If the original submittal was correct, that submittal could simply be transitioned to No Exceptions Taken or Review Not Required. If the original was not correct and it was re-submitted once or many times, when the final iteration of the shop drawing is determined, the status should be either No Exceptions Taken or Make Correction noted – No Resubmittal Necessary.

All iterations of the drawing will remain in the Shop Drawings drawer for the life of the contract.

After the final iteration of the document has been determined, a materials user will transition the document to Audited. They are the only ones who should transition to that status.

Show Drawings Workflow

Set up:

Janet - Once the Doc Express initial contract setup is done for a letting and access has been given to DOT users, send a note to the **users** so they are aware that they can go into Doc Express and set their favorites. *(Please note: Beginning with the October, 2015 letting, a shop drawing drawer will be added to all contracts. It is important that a **user** selects a contract as their “Favorite” so they know they will be receiving the favorite summary notifications for shop drawings. It is suggested that you set contracts as your favorites when you receive the contract setup note from Janet. That way no notifications will be missed.)*

Users - Turn “ON” the notification for the Favorite submissions (click Preferences > Notifications) so you are alerted when any Submittal has been made or transitioned the previous day. You will receive 1 email per day from Doc Express for all contracts to which you have access and which had transitions occur the previous day. The summary will give with each e-mail displaying what has been submitted and what the submittal is (see following examples)



How-to directions:

How-to set a contract as a favorite:

Navigate to the appropriate contract. Click the “Favorite” button on the top right side of the contract area. After you mark the contract as your favorite and set your notifications as listed above, you will automatically receive an email from Doc Express when something has been submitted, transitioned or commented on in any drawer **to which you have access** in the contract. *Design personnel have only been given access to the Shop Drawings drawer, so your emails should only contain notifications about submittal items.*



How-to know when to look in Doc Express:

There are a few ways. The most common will be when you receive an automatic email from Doc Express. This email will look like the sample shown below. Each submittal will have a type, with that type matching directly from Table 1105.03-1 of the spec book. The key to knowing what to review is for reviewers to know the contract and the types for which they have responsibility.

Option 1 -

Sample of a Doc Express daily summary email for contracts marked as favorites –

Document Submission Daily Report for Favorite Contracts - 05/18/2015

Doc Express <notifications@doceexpress.com>

[If there are problems with how this message is displayed, click here to view it in a web browser.](#)

[Click here to download pictures.](#) To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Sent: Tue 5/19/2015 5:01 AM

To: Wastenev, Janet [DOT]

Doc Express Contracts.

Yesterday, 05/18/2015, the following 3 new documents were created:

IMN-080-3(175)119--0E-25	Project Number
Shop Drawings	Drawer Name
Falsework D#9876 <Jennifer Strunk of Iowa DOT - 01:34 PM CDT>	Submittal Titles
Falsework for slab bridges	
RCB Handrail drawings <Jennifer Strunk of Iowa DOT - 01:32 PM CDT>	
Steel and aluminum pedestrian hand rails	
bridge type entry <Jennifer Strunk of Iowa DOT - 01:31 PM CDT>	
Bridge components	

Types (points to Falsework, RCB Handrail drawings, bridge type entry)

Submittal Titles (points to Falsework for slab bridges, Steel and aluminum pedestrian hand rails, Bridge components)

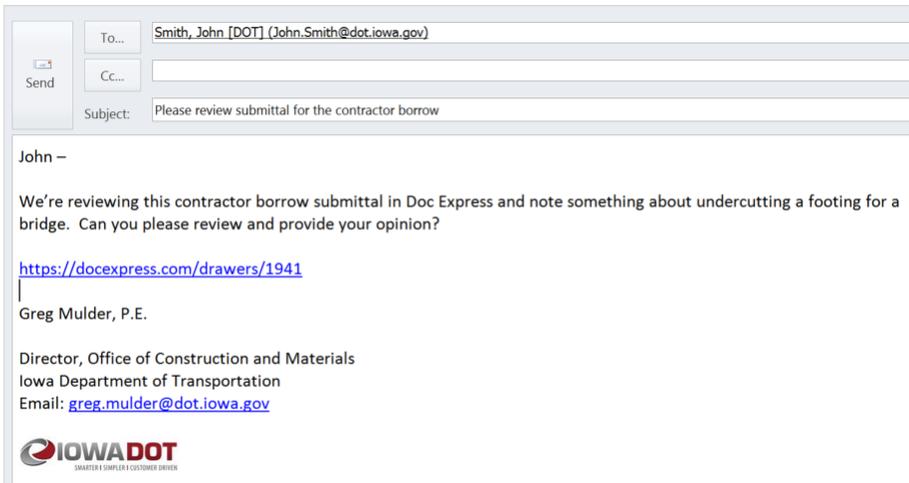
In the previous graphic, only 1 contract was displayed because I had only 1 marked as my favorite. If more than 1 contract was marked as a favorite, each contract would be listed in this same e-mail, one following the other.

Option 2 -

Another way you may be notified that you have work to do in Doc Express is if someone forwards you their email from Doc Express and asks you to review something.

Option 3 -

If they have deleted their email, they can also just send you the URL link directly to the document in Doc Express. If you need to do this, simply cut the URL from your Doc Express browser and paste it into your email.

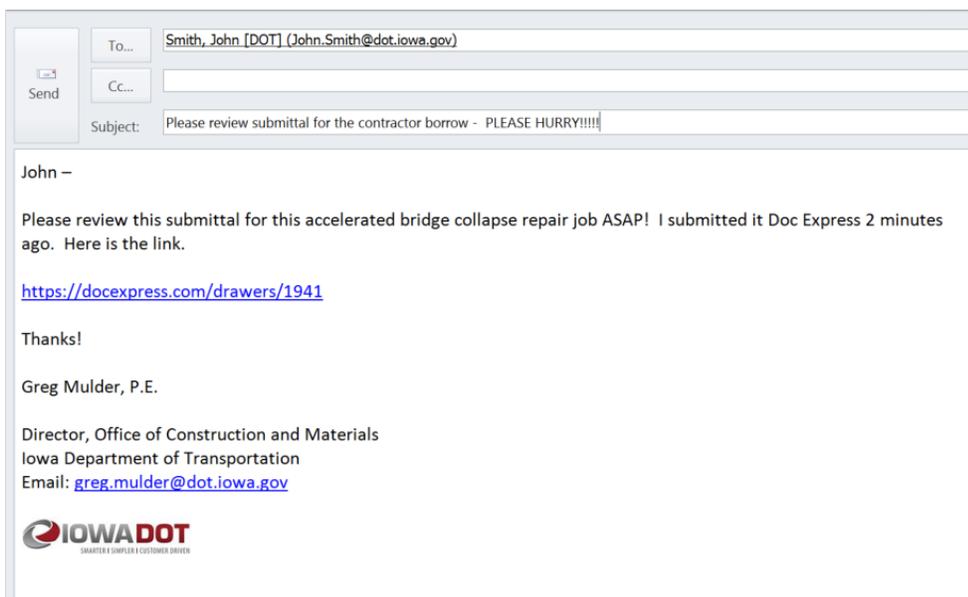


The above options all get you to the same place but 99% of the time you will react from the automatic notification which is the most efficient and consistent method of notification. The other options will most likely be rarely used and may have some unwanted delays.

Option 4 -

The cut and paste email method may be also used when there is an accelerated submittal. (see following graphic)

Review ASAP!



How-to view the Shop Drawings drawer - (notice the types and titles)

The screenshot displays a list of shop drawings. The first entry is titled "CRETEX MANHOLE SHOP DRAWINGS" with a type of "Precast concrete (i.e. deck panels, RCB culverts, noise wall panels, arch sections, etc.)". The second entry is titled "Precast Storm Sewer Intakes" with a type of "Precast concrete (i.e. deck panels, RCB culverts, noise wall panels, arch sections, etc.)". Blue arrows labeled "Title" point to the drawing titles, and arrows labeled "Type" point to the drawing types. A "Transition" button is visible in the top right of each entry's header.

How-to Submit:

The initial submittal is normally done by the prime or sub, not a DOT user

Navigate to the correct contract. Open the Shop Drawings drawer by clicking on it. Press the Submit Document button located in the upper right side of the screen.

Shop Drawings Drawer

The screenshot shows the "Shop Drawings" drawer interface. At the top, there is a search bar with the text "Search for documents" and a "Search" button. Below the search bar, the title "Shop Drawings" is displayed, followed by the contract information "IMN-080-3(175)119-0E-25 - Creston - 25 - 25-0803-175 - PCC Pavement - Grade & New". A "Submit Document" button is located in the upper right corner. A blue arrow labeled "SUBMIT" points to this button. Below the contract information, a list of drawings is shown, with the first entry being "Signal Pole and Mast Arm Data" with a type of "Traffic signalization" and an "update" button.

Title the submittal appropriately. **It is highly suggested to use the design number and county name in the title.** Select the appropriate submittal type from the drop down list (this list matches 1105.03-1.) Enter comments if desired. Press Save.

New Document Save

* Title
Design #1234

* Types

- Falsework for slab bridges
- Cofferdam design (when required)
- Reconstruction of substructure (detailed plans for supporting the superstructure)
- Steel Structures
- Detail plans for falsework or centering support of steel structures (i.e. erection plans)
- Steel and aluminum pedestrian hand rails

Comment

How-to review a submittal:

When notified, navigate to the submittal you are responsible for. Click on the title of the submittal to get the option to download or open the file. Open or download as you see fit. Review and mark up the most current (in case there have been multiple submittals for the same document) submittal as needed.

How-to respond to a submittal -

Click the word “Transition” which is to the right of the submittal.

Shop Drawings Submit Document Actions

MN-080-3(175)119-0E-25 - Creston - 25 - 25-0803-175 - PCC Pavement - Grade & New

<p>Signal Pole and Mast Arm Data Traffic signalization update</p> <p>Peterson Contractors</p> <p>1 Add a new comment</p> <p>May 12 07:50 AM CDT Submitted Signal Pole and Mast Arm Data Peterson Contractors - Jeff Theis</p>	<p>Submitted</p> <p>Transition</p>
<p>Traffic Signal Poles Welding Procedure Traffic signalization update</p> <p>Peterson Contractors</p> <p>1 Add a new comment</p>	<p>Submitted</p> <p>Transition</p>

Displaying all 24 entries



After clicking on Transition, you will see the same response options you currently have. (See the following graphic) If you select either “**Review Not Required**” or “**No Exceptions Taken**” and click the Save button, you have nothing else required to do for this submittal.

The Materials people will also check the drawings and when they are OK with them, they will transition them to an Audited status which, in effect, completes the submittal.

Transition Document

* Status

- Review Not Required
- No Exceptions Taken
- Make Corrections Noted - No Resubmittal Necessary
- Audited
- Amend and Resubmit
- Rejected - See Remarks

Supporting Documents

[Add a supporting document?](#)

Save Cancel

If you select either “**Make Corrections Noted – No Resubmittal Necessary**” or “**Amend and Resubmit**”, you should also click “Add a supporting document?” then browse to your updated/corrected drawing so the other users know and can see specifically what should be changed.

If you select “**Amend and Resubmit**”, the submittal process begins again with the original submitter downloading the marked up document, making the corrections, and then resubmitting. The person responsible for approving the drawing opens the corrected submittal and determines the status just as they did with the original submittal.

If you select “**Rejected – See Remarks**”, you should explain in the Comment field before saving so other users with access to this drawer will know why the document was rejected. Each user with access to the contract and drawer and who has the Rejected Notification turned “on” will receive an e-mail.

SIGNATURE DRAWER – SUBMITTALS & TRANSITIONS -

The Signature drawer contains several types with each type listed in the drawer being a form that may require 1 or multiple signatures. The forms no longer must be printed and signed by a wet signature. The electronic signature in Doc Express is accepted when the completed form is saved as a pdf file and submitted to the Signature drawer in Doc Express. If you wish to see all the types, click the Submit Documents button and put your cursor in the Types field and scroll down.

Click on the Signatures drawer beside or below the appropriate contract. A list of all previously submitted documents are displayed with, by default, the most recently updated being at the top of the list. The order of the list can be changed by opening the filter section (clicking the horizontal lines below the search field) and changing that field.

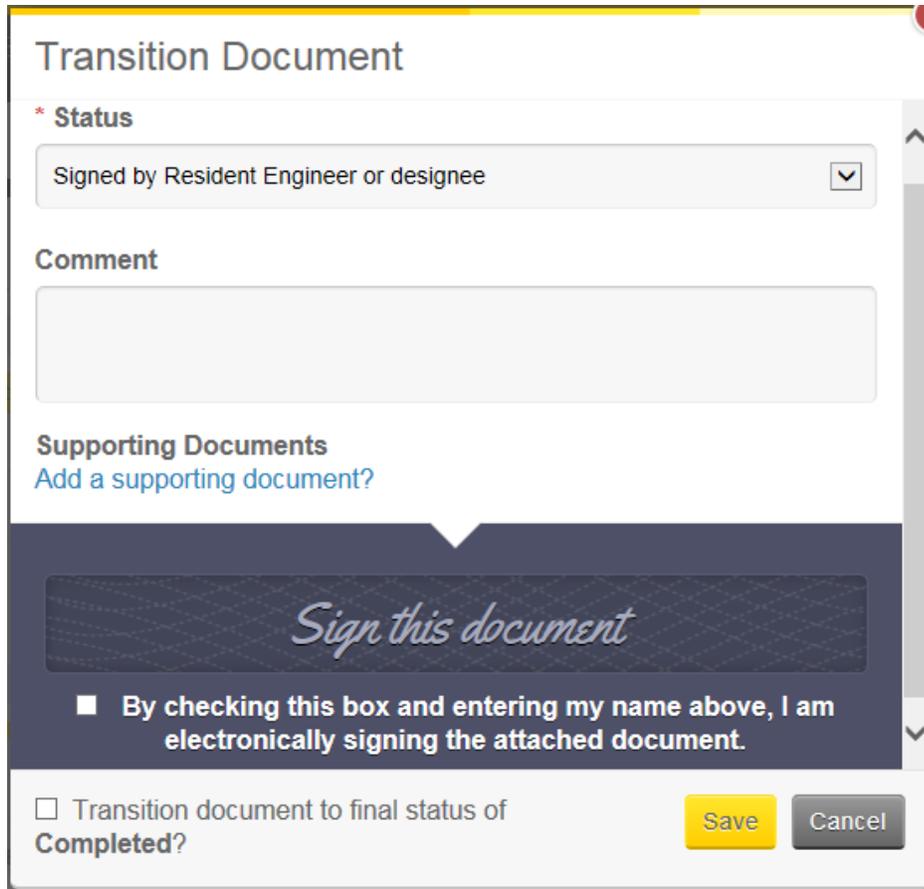
SUBMIT –

Click the Submit Document button and enter the appropriate information in the title field. Select the appropriate type by putting the cursor in that field and scrolling down until you find the correct one.

The screenshot shows the 'New Document' interface. At the top, there is a header bar with the text 'New Document' on the left and a yellow 'Save' button on the right. Below the header, there are three main input areas: a 'Title' field with a red asterisk, a 'Comment' field, and a 'Types' dropdown menu. The 'Types' menu is open, displaying a list of document types. The first item, 'Final Paperwork - Audit of Final Pay Estimate (Form 830301)', is highlighted in yellow. Other items include 'Final Paperwork - Certification of DBE Accomplishment (Form 102116)', 'Final Paperwork - Certification of Subcontractor Payment (Form 518002)', 'Final Paperwork - Final Construction Pay Estimate', 'Final Paperwork - Final Payment (Form 830436)', and 'Final Paperwork - Noncomplying Test or Measurements of'.

Browse to the form requiring the signature and enter a comment, if desired, then Save. You as the submitter have the option to Remove the submittal until someone comments or signs.

If you are the first who should sign the document, click Transition and select the appropriate status and then sign your name, check the signature box, then Save. If additional documentation should be attached to this document, click on “Add a supporting document?, ” browse to that location and then Save.



Transition Document

* **Status**

Signed by Resident Engineer or designee

Comment

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

Sign this document

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

Transition document to final status of **Completed?**

Save Cancel

Since the required number of signatures is dependent on the form, the transition displays every signature possible needed for the forms in the drawer. ONLY the individuals who would sign the form if it were in hard copy should sign the form here.

Since the required number of signatures varies, the signature document will not have every signature line populated when the form has been fully signed. The last user to sign should mark the document Completed. That Completed transition will be displayed in the log but not in the signing history.

Doc Express Document Signing History

Contract: NHSN-000-S(673)--2E-00 Document: Weekly Report #4

This document is in the process of being electronically signed by all required signatories using the Doc Express service. Following are the signatures that have occurred so far.

Date	Electronically Signed By
02/03/2015	Scott Nixon Iowa DOT (Signed by Resident Engineer or designee)
	(Signed by Contractor)
	(Signed by District Construction Engineer or designee)
	(Signed by District Materials Engineer or designee)

Even after the document has received the appropriate signature(s), the form remains in the Signatures drawer with a Completed status throughout the life of the contract.

Signature

NHSN-000-S(673)--2E-00 - Creston - 00-000S-673 - Traffic Signs

Submit Document Actions

Weekly Report #5 [Weekly Report of Working Days](#) [Update](#) Submitted Transition

Iowa DOT

[Add a new comment](#)

Feb 16 08:36 AM CST Submitted
Download version 1
Iowa DOT - Jen Strunk
2015

Weekly Report #4 [Weekly Report of Working Days](#) Completed

Iowa DOT

[Add a new comment](#)

Feb 03 08:04 AM CST Completed
Iowa DOT - Scott Nixon
2015

PLANS DRAWER – SUBMITTALS & TRANSITIONS

The work flow for the Plans drawer immediately follows this section.

This drawer is a staging drawer (similar to the Working drawer) intended for documents (project plans) to be submitted, updated, etc. until the project work is done. At that time the final set of plans should be Published to the Contract Documents >

Project Plans type. Although only DOT users submit to and update this drawer, the intent of this drawer is that all users have access to it resulting in everyone working from the same and most current set of plans for the project.

Once the project work is complete, the final set of plans should be Published to the Contract Documents drawer, Project Plans type. All iterations of the plans remain in the Plans drawer.

SUBMIT –

Only DOT organization users can submit to the Plans drawer. It is also the only organization that can transition a submittal. A log of every transition, including date/time/user name, etc. is maintained. Every user and organization should have access to this drawer.

The original submittal screen (shown below) is similar to the Working drawer in that there is no type field since there are no types for this drawer. Notice there is an option to add Supporting Documents (additional notes, documents, etc.) for the submittal.



Contracts / June Letting / Plans / New Document

New Document Save

* Title

* Attachment

[Enter text instead of attaching a document?](#)

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

Comment

The “**As Advertised**” set of plans is to be **submitted** to the Plans drawer as soon as possible **by the RCE Office** but at a minimum 2 weeks prior to the letting date. Enter the project number in the title and then **in the comments, enter “As Advertised”** but do not put that in the title. (Other pre-contract details such as proposal, etc. should also be submitted by the RCE Office but to the appropriate type in the Contract Documents drawer instead of the Plans drawer.)

If there are changes to the original plans, after the letting **the Office of Contracts will click the Re-Submit** option and **submit** an “**As Let**” set of plans which includes any addendums and in the **comments field enter “As Let”** to distinguish it from the initial set of plans. **This updated set of plans will replace the previous set at the top of the list of submittals so the most current is always seen when opening this drawer.**

The RCE Office is to be notified of any additional revisions **following** the submittal of the “**As Let**” set of plans. Once notified, the **RCE Office** is to resubmit the updated set of plans which will “overwrite” the previous set so everyone has access to and is working from the same and most current set of plans. They should enter a

comment to describe the new submittal. If everyone has the notification option turned “on” for the Plans drawer, each time the plans are updated, they will be notified.

When the contract work is finished, the most current set of plans is to be Published by a DOT user. The published location is the Contract Documents > Project Plans type where the plans will remain permanently as part of the contract records.

Plan Room Workflow

DOT Users - Turn “ON” the notification for the Plans drawer so you are alerted when any revision to a plan has been made and submitted

Janet - Once the Doc Express initial contract setup is done for a letting and access has been given to DOT users, send a note to the residencies so they are aware that documents can be submitted.

RCE Office - As soon as the note above has been sent but a minimum of 2 weeks prior to the letting, submit a copy of the “as advertised” set of plans to the Plans drawer and other contract details to the Contract Documents drawer. The plans should have a comment stating they are the As Advertised set. (Explained below) **(Please note: it is important for this workflow for the RCE office to upload the “as-advertised” plans to the Plan room as described. If not completed in order, the next step of Contracts office submitting updated “as let” plans will be compromised.)**

If there are any plan addendums, the Designers will work with the Office of Contracts to **resubmit** an “As-Let” plan set as an update to these plans. This PLANS drawer will become a virtual PLAN ROOM for the always current set of plans, along with being able to see any changes made as the project progressed from advertising to letting and any plan revisions made during construction. The most current set of plans will be on top but all previous iterations of the plans are kept in the log.

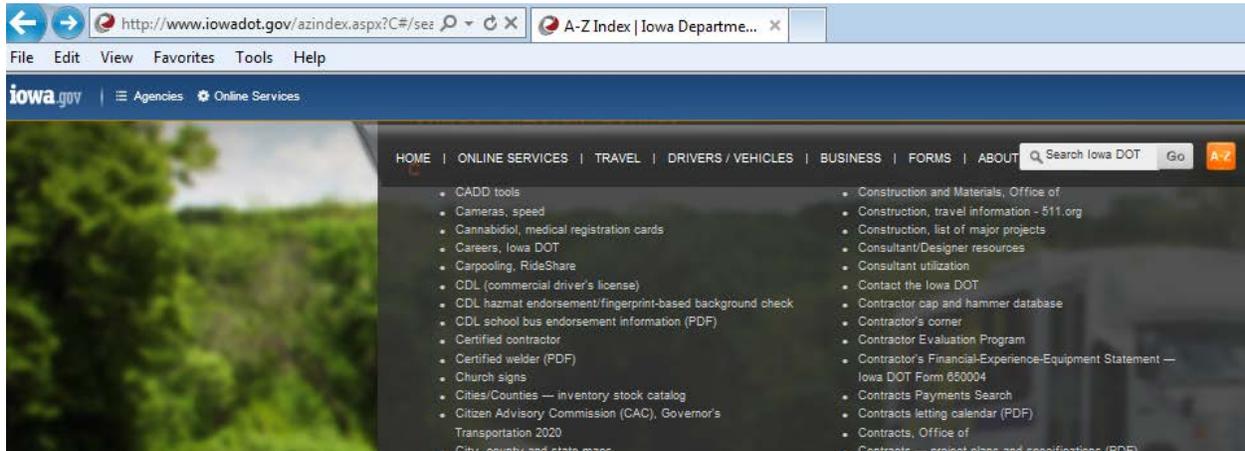
Office of Contracts – Re-submit any revisions/addendums, etc. in a full set of updated plans to the Plans drawer so they are displayed “on top” of the “As Advertised” set. Enter a comment stating they are the As Let set of plans.

RCE Office/Office of Contracts - Plan revisions made post letting will be conveyed to the appropriate administering office for that office to update (resubmit) the PLAN ROOM set of plans

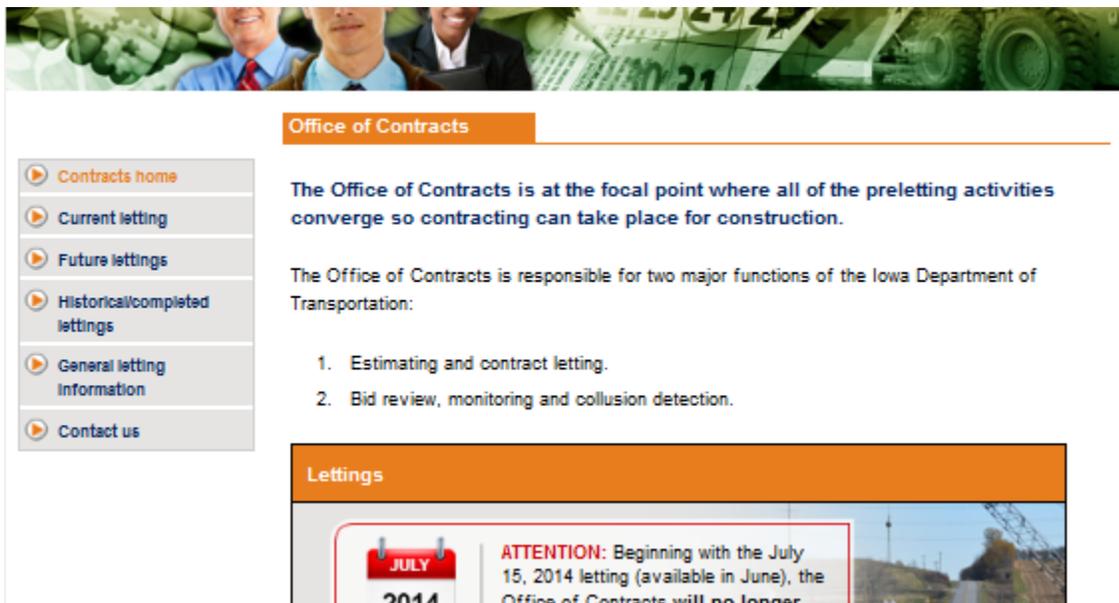
How to directions:

Go to <http://www.iowadot.gov/contracts/lettings.html>

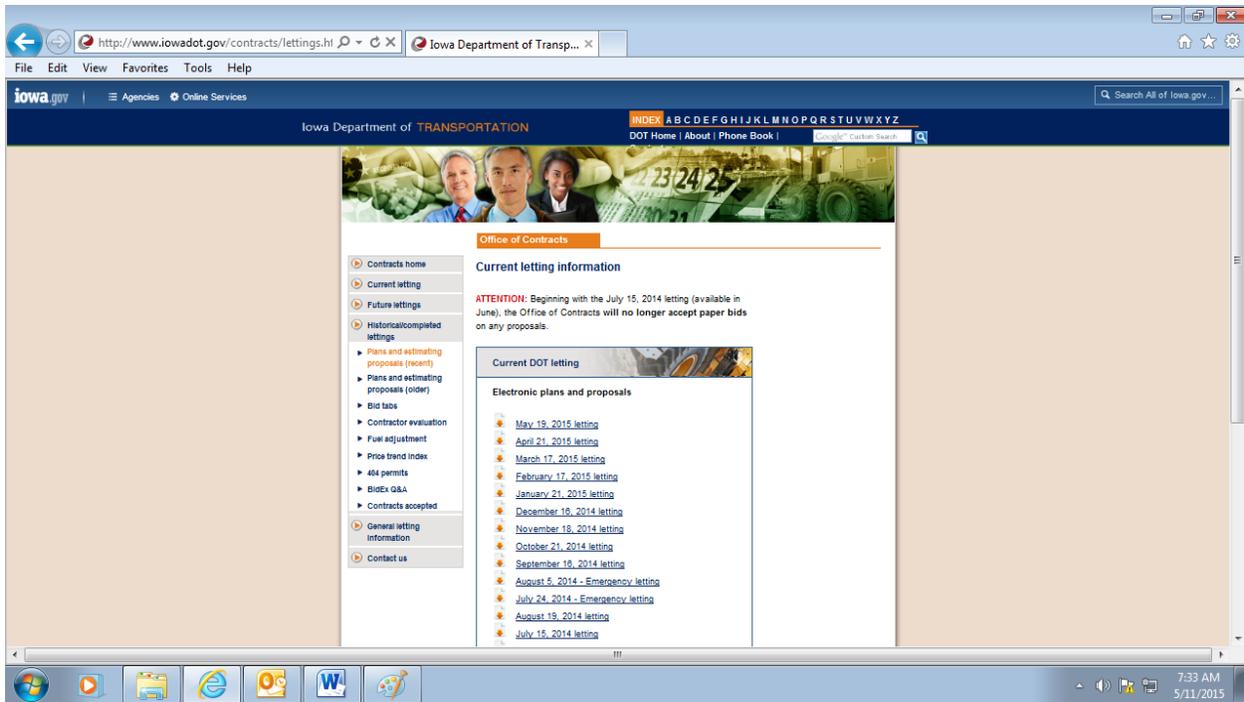
If you don't have the above full link, go to <http://www.iowadot.gov>, click on the A-Z button and select the letter "C" to have the following screen displayed.



Select Contracts, Office of and the following screen will be displayed where you should select Historical/completed lettings



Then select Plans and estimating proposals (recent) to have the following screen displayed where you highlight the appropriate letting.



Following a disclaimer, all contracts (listed in bid order number) in that letting will be displayed

Office of Contracts [Help / FAQ](#) | [Request a prior letting document](#)

Letting documents - May 2015

Disclaimer
 The ability to access this information online is not to be construed as an indication that a person or entity is eligible to bid on projects for which bids are being solicited. Contractors must be authorized to submit a bid as a prime by the Office of Contracts. Requests to be authorized to bid as a prime contractor on individual proposals must be submitted through the [Bid Express website](#) by noon the day prior to the letting unless specified otherwise.

NOTICE: A Bidder Status Form must be on file in order to be authorized to bid on any contract let by the DOT. [View details.](#)
Effective with the Jan. 21, 2015 letting

Call group	Bid order range	Call group	Bid order range
Structures	001 - 080	Traffic safety	351 - 400
Alternate pavement types	081 - 100	Buildings and building sites	401 - 450
PCC pavement	101 - 150	Miscellaneous	451 - 500
HMA - pavement / resurfacing	151 - 200	Erosion control	501 - 600
Surface rehabilitation	201 - 300	Bridge painting	601 - 650
Grading	301 - 350	Small business contracts	981 - 999

Show 10 entries Search:

Bid order	Proposal ID	County	Project number	Download
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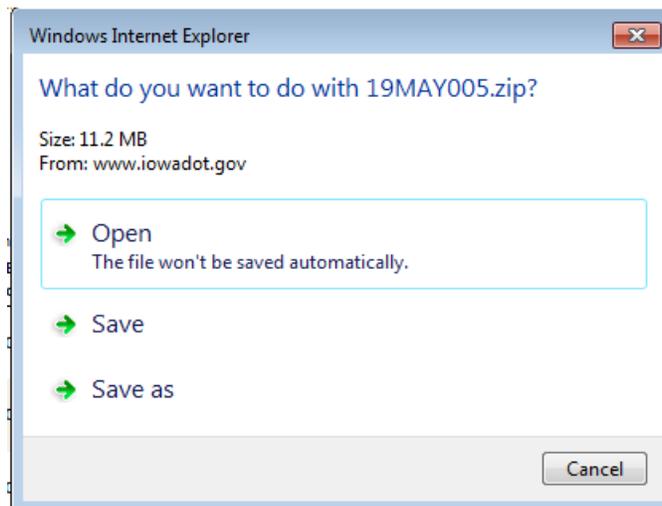
Scroll down until you locate the appropriate contract. For this example, we're selecting Bid Order Number 005.

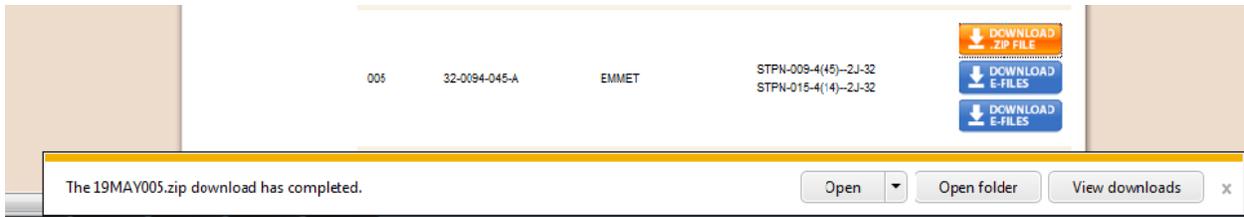
<u>Call group</u>	<u>Bid order range</u>	<u>Call group</u>	<u>Bid order range</u>
Structures	001 - 080	Traffic safety	351 - 400
Alternate pavement types	081 - 100	Buildings and building sites	401 - 450
PCC pavement	101 - 150	Miscellaneous	451 - 500
HMA – pavement /	151 - 200	Erosion control	501 - 600
resurfacing	201 - 300	Bridge painting	601 - 650
Surface rehabilitation	301 - 350	Small business contracts	981 - 999
Grading			

Show entries Search:

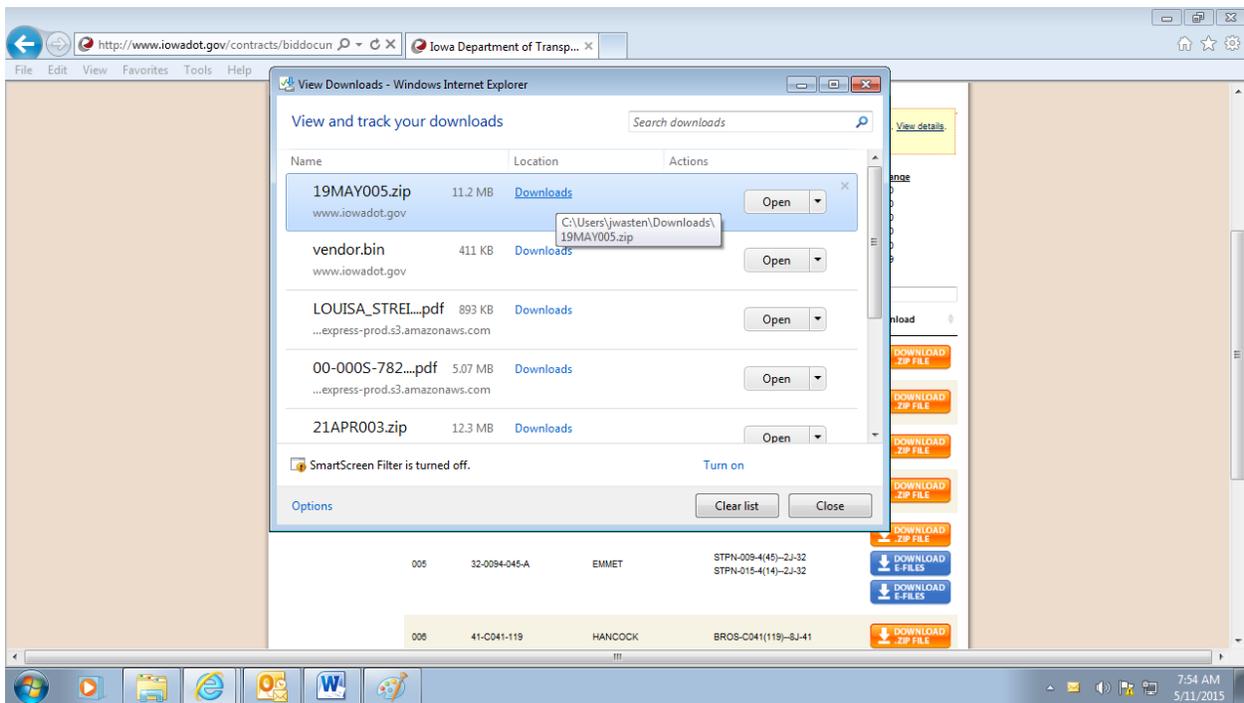
Bid order	Proposal ID	County	Project number	Download
001	01-0022-803	ADAIR	BHM-0022(803)--8K-01	
002	09-C009-052	BREMER	BROS-C009(52)--8J-09	
003	26-C026-088	DAVIS	BROS-C026(88)--8J-26	
004	31-0618-132	DUBUQUE	BRFN-061-8(132)--39-31	
005	32-0094-045-A	EMMET	STPN-009-4(45)--2J-32 STPN-015-4(14)--2J-32	

Click on the “orange” Download Zip File button to the right of the contract and you will immediately see the screen below where you should choose the Save option.

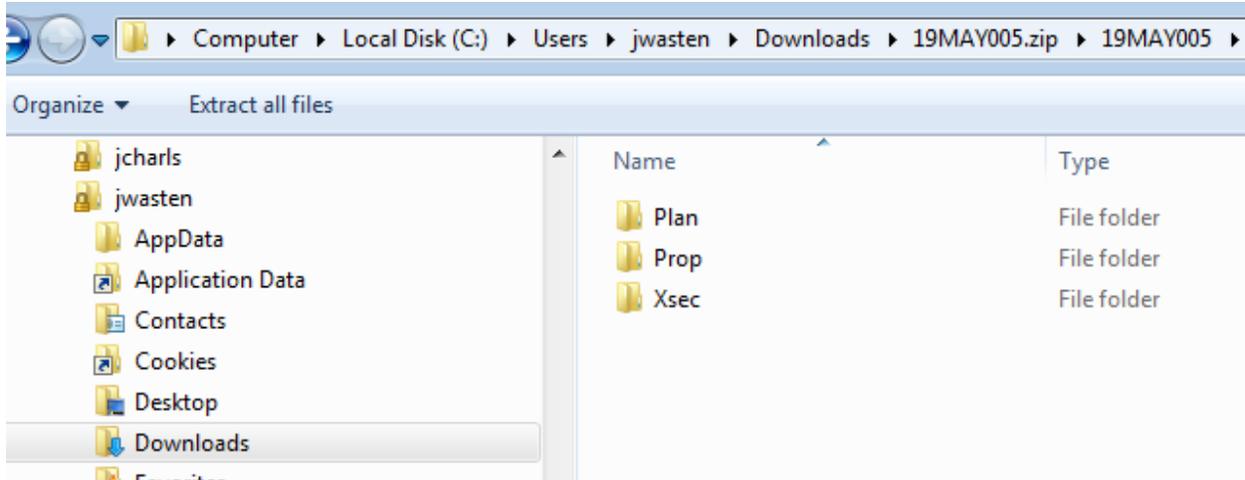




Go to the location of the download zip file (can find this location by clicking on View downloads)

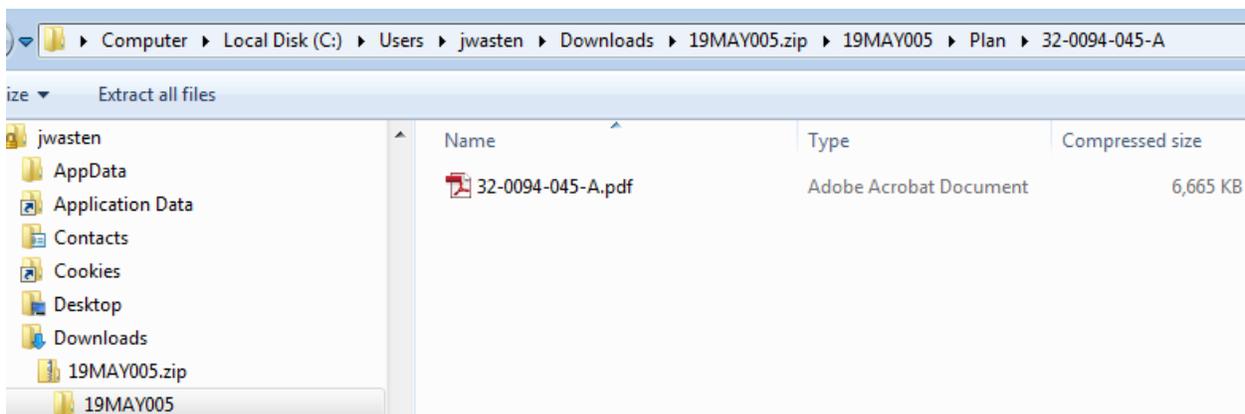


Double click on the zip file to see the folder(s) within it OR click the Open button to get the same result (shown below)

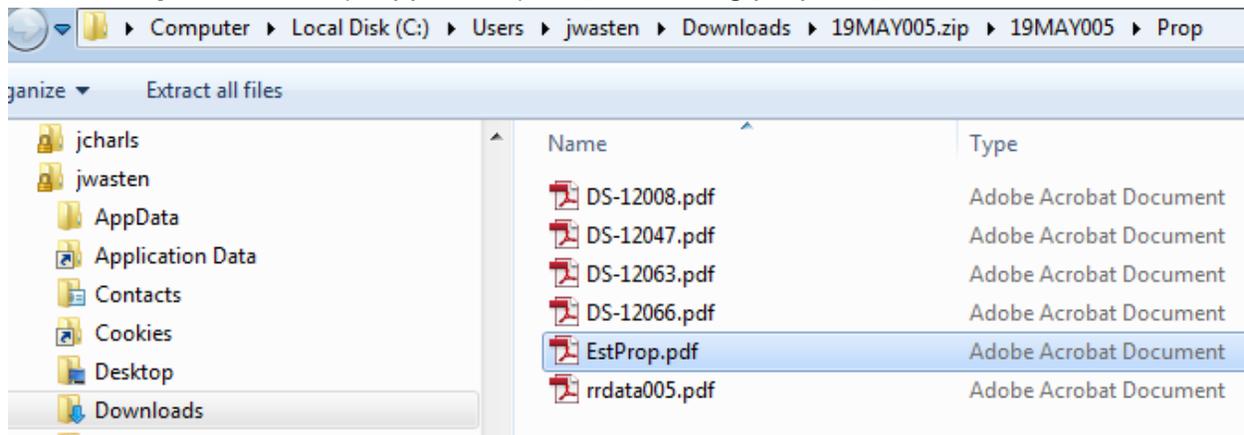


The subfolders displayed above will be for

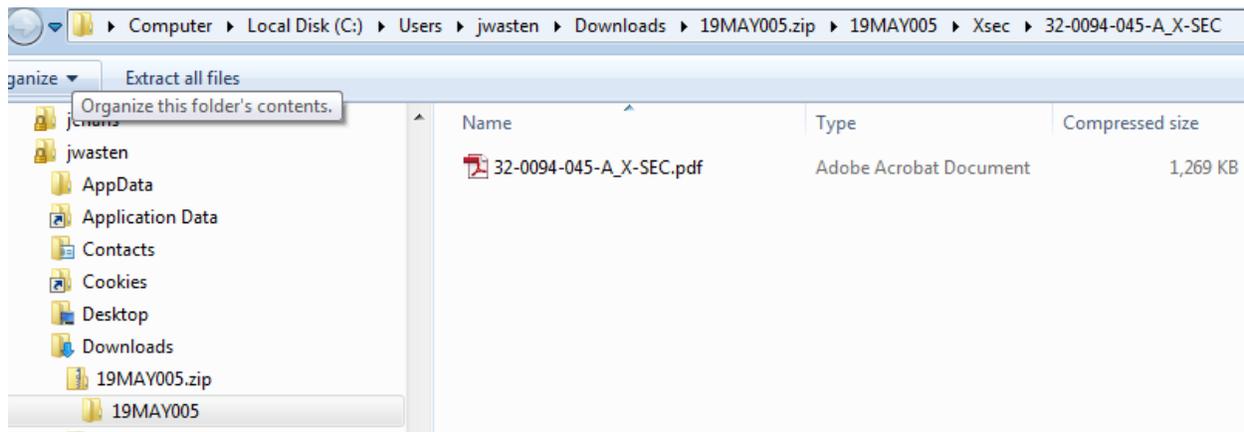
Plan – contains the plans for each project in the contract. Double click on the folder until the pdf file containing the plans is displayed. The .PDF file should be saved to the Plans drawer in Doc Express.



Prop – contains (if applicable) DS, estimating proposal, railroad data sheet.



Xsec – contains cross section legend & symbol info sheet for each project. Will need to double click on the folder to get to the pdf file



Putting the documents in Doc Express –

The **files in the Prop folder should be submitted to the Contract Documents drawer** in the appropriate type – Proposal, Development Specifications, RR Data Sheet.

To do so -

- Start the Doc Express program
- Search for the appropriate contract

Contracts

32-0094-045-

Contracts

May Letting [edit](#) [Contract Documents](#) / [Contract Modifications](#) / [Pay Items](#) / [Plans](#) / [Signature](#) / [Working](#)

Britt - 32-0094-045-A -

Emmet County Hwy 9 Letting Date: May 19 2015 Bid Order Number: 005

Open either the Contract Documents or the Plans drawer (whichever is appropriate for the submittal) and click the Submit document button.

Give the submittal a descriptive title – for plans, use the project number. If in the Contract Documents drawer, select the correct type and then browse to the location of the file and then Save.

Contracts / May Letting / Contract Documents / New Document

New Document [Save](#)

* Title Comment

* Types

* Attachment [Enter text instead of attaching a document?](#)

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

Once saved, the document will be displayed in the list of submittals for that drawer.

Plans (385) [update](#) [Draft](#)

Iowa DOT [Publish](#) / [Resubmit](#) / [Archive](#)

[Edit due date](#)

Add a new comment

Apr 30 07:53 AM CDT **Draft**
 ↓ Plans (385)
 2015 As advertised plan set
 Iowa DOT - Greg Mulder

If you want to enter a due date, click on Edit due date located under the status on the right side of the screen. You can also enter and/or change a due date by clicking the Update button.

If you submitted to the wrong drawer, you (as the submitter) can Remove the document and start over.

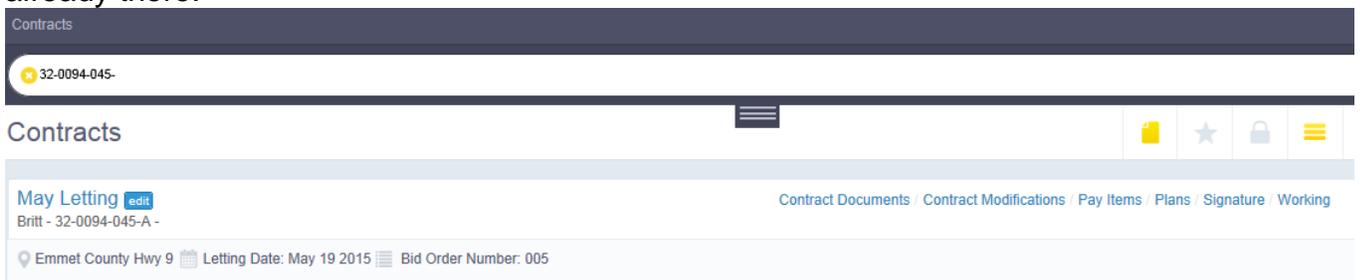
If you submitted to the correct drawer but the wrong type, click the Update button and change the type then Save. The change will be reflected in the list of documents submitted.

The files in the Xsec and Plans folders should be submitted to the Plans drawer.

Once the contract work is complete, the most current set of plans and the xsections should be published to their appropriate type in the Contract Documents drawer.

To do so -

Start the Doc Express program and search for the appropriate contract if not already there.



Open the Plans drawer and click the Submit document button

Enter a title. If they are plans, enter the word Plans followed by the project number. The project number is needed in case of tied projects in the contract. Do NOT put “As Advertised” in the title but instead, if you want it displayed, put it in the Comments field. If they are Xsections, enter an appropriate title beginning with Xsec then Save.

New Document Save

* **Title**

* **Attachment**

[Enter text instead of attaching a document?](#)

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

Comment

When project work is complete, the most current set of plans are to be published by the RCE Office to the Contract Documents drawer > Project Plans – FINAL SET type. The Xsections are to be published by the RCE Office to the Contract Documents drawer > Project Cross Sections – FINAL SET

EXPORTING DATA –

After opening the contract (as seen below), click on the Actions button and select Export. Immediately a note will be displayed stating that you will receive an e-mail with a link to download when the export is done.

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

Contracts / IMN-080-2(240)73--0E-01

IMN-080-2(240)73--0E-01

Manage Access

Export

Creston - 01-0802-240 - PCC Patching

Contract Documents	1
Contract Modifications	
Pay Items	1
Signature	1
Working	

The e-mail will have a link to the location of the download of data – similar to the one shown below.

Link to Download Export for Contract IMN-080-2(240)73--0E-01

Doc Express <notifications@docexpress.com>

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Sent: Mon 9/14/2015 11:02 AM

To: Wasteney, Janet [DOT]

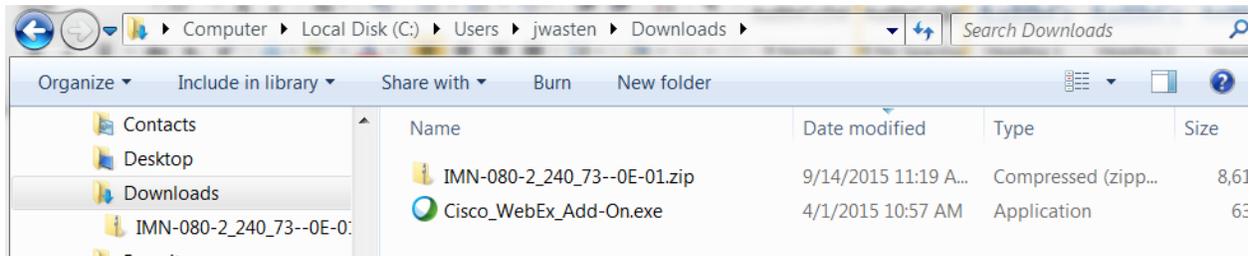
Janet Wasteney,

The export requested at 09/14/2015 11:01 AM CDT has completed.

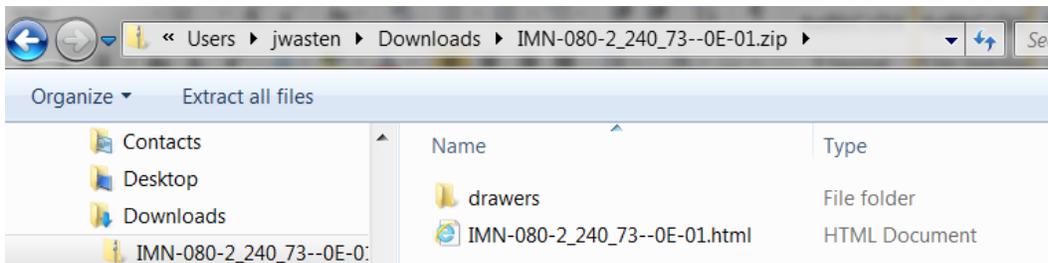
[Download Export of IMN-080-2\(240\)73--0E-01](#)

Click on the link and choose the Save option.

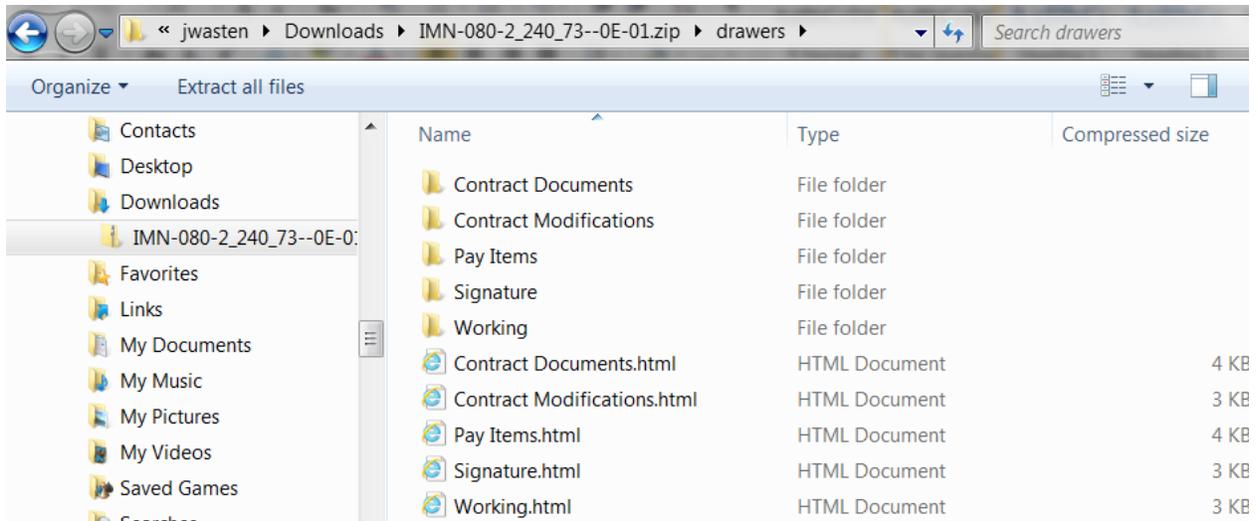
Go to the location where the download file was saved and find the zip file. (The contract ID will be in the title of the file)



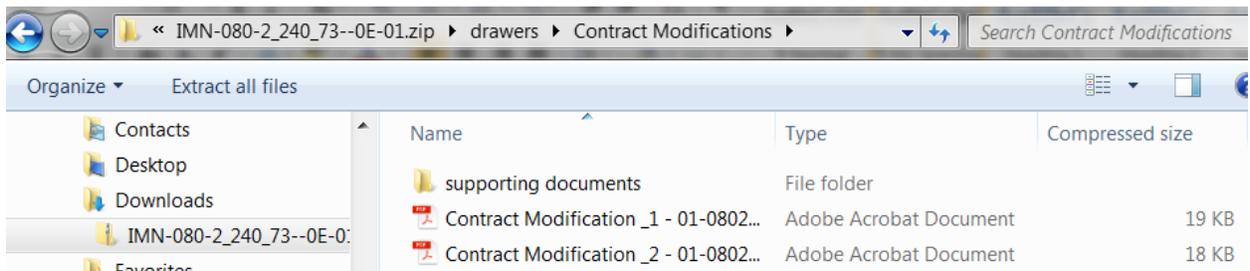
Double click on the zip file to see the contents.



Double click on the drawers folder. All drawers associated to this contract are included in this export and are displayed as a file folder. (see the following graphic)



By double clicking on one of the file folder drawers, that drawer's contents, if any, are displayed exactly as in the program. For instance, when I double clicked on the Contract Modifications file folder, a list of all cont mods that had been submitted are displayed as well as a file folder that contains all supporting documents that had been submitted. To see the actual cont mod, double click on that file name.



By clicking on a .html file, that drawer or contract's submittals are displayed just as they would be if you were in the actual program. See below for an example of the contract modification drawer html file -

Contract Modifications



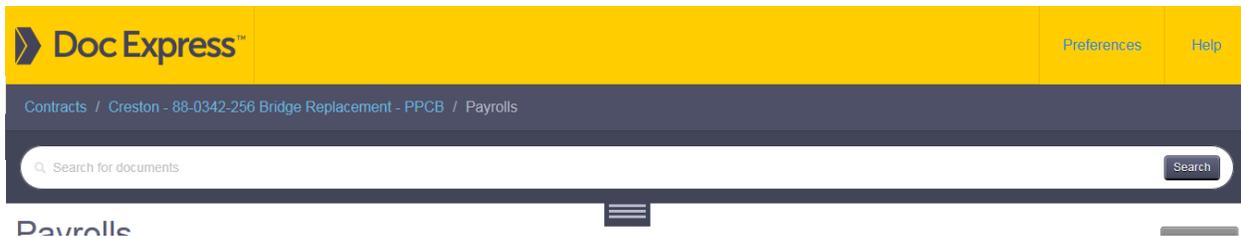
ARCHIVING (hiding) DOCUMENTS –

If you have placed a document in the wrong type and/or contract and can no longer remove it, if you contact either Dean or Janet, we can archive the document for you. The result of doing so is that the document is removed from the list. It's not deleted from the drawer but is rather hidden.

To view the documents that have been archived (hidden), open the filter and select Show Archived instead of Hide Archived. Only those documents that have been archived will be displayed. To return to the regular list of documents, change the filter back to the default of Hide Archived.

ODDS & ENDS –

To return to a contract and/or previous drawer, follow the breadcrumbs . In the sample below, you could click on the word Contracts to return to the list of contracts or you could click on the Creston- 88-0342-256 Bridge Replacement – PPCB to return to the contract itself where you could continue to work in other drawers in that contract.



If a subcontractor is added after the contract was let, advise Janet or Dean so a type can be added for them in the Payrolls drawer if one is required for the contract. The prime contractor can give subcontractors access to the contract and drawers, they just can't add a type for them in the Payrolls drawer.

When new items are added by contract modification, notify Dean or Janet so a type for each of them can be added in the Pay Items drawer.

If you don't see a contract and/or drawer for which you need to submit a document, contact either Dean or Janet so they can give you access.

APPENDIX A - As of August 1, 2015

Contract Documents Drawer Types

Addendum

Agreements for Private Property Used by Contractor (Construction Manual 2.26)

Asbestos Abatement Report

Clean Water Act Section 404 Permit

Construction Pay Estimate

Contract

Correspondence

DBE Commercially Useful Function Checklist (Form 517014)

DBE Commitment Report

Developmental Specifications

EEO/Wage Site Inspection

Environmental Clearances

Final Highway Funding Sources

Final Paperwork - Cost Sharing Memorandum

Final Paperwork - Interest Payment Information (Form 830235)

Haul Road Designation

Iowa DNR Floodplain Permit

Iowa DNR Notification of Completion of Construction (DNR Form 37)

Night Work Plan and Approval

Notice to Proceed (Form 830237, CM 2.32)

Notice of Suspension or Resumption of Work (Form 810036, CM 3.06)

Preconstruction Agreements

Preconstruction Meeting Information

Project Cross Sections – FINAL SET

Project Plans – FINAL SET

Project Schedule

Proposal

Registration of Minor, Nonrecurring Use of Water (DNR Form 20, CM 2.14)

Right of Way Certificate

RR Agreement

RR Data Sheet

Special Provisions

Storm Water Co-Permittee Certification Statement

Storm Water Notice of Discontinuation

Storm Water Permit

Subcontract Request and Authorization

Supplemental Specifications

Utility Bid Attachments

APPENDIX B - As of August 1, 2015

Signature Drawer Types

Final Paperwork - Audit of Final Pay Estimate (Form 830301)
Final Paperwork - Certification of DBE Accomplishment (Form 102116)
Final Paperwork - Certification of Subcontractor Payment (Form 518002)
Final Paperwork – Contractor Evaluations
Final Paperwork - Final Construction Pay Estimate
Final Paperwork - Final Payment (Form 830436)
Final Paperwork - Noncomplying Test or Measurements of Materials Incorporated into the Project
Final Paperwork - Statement of Salvaged Materials
Items Paid by Plan Quantity (Form 830230)
Noncompliance Notice (Form 830245)
Pre-Audit Agreement
Request for Early Release of Retained Funds
Statement of Completion and Final Acceptance of Work (Form 830435)
Storm Water Inspection Reports
Weekly Report of Working Days

APPENDIX C - As of June 1, 2015

Shop Drawing Drawer Types

Falsework for slab bridges
Cofferdam design (when required)
Reconstruction of substructure (detailed plans for supporting the superstructure)
Steel Structures
Detail plans for falsework or centering support of steel structures (i.e. erection plans)
Steel and aluminum pedestrian hand rails
Highway sign support structures (i.e. trusses, cantilevers, & bridge mounts)
Precast concrete (i.e. deck panels, RCB culverts, noise wall panels, arch sections, etc.)
Tower lighting
Highway lighting
Highway signing steel breakaway posts
Traffic signalization
Highway signing - Type A & B signs
Bridge components
Pre-engineered steel truss recreational trail bridge
MSE, segmental, & modular block retaining walls
Soil nail & tie-back retaining walls

Intermediate foundation improvement (IFI)(i.e. stone columns, geopiers, etc.)
Removal of box girder bridges
Structural erection manual
Temporary shoring
Temporary seet pile retaining wall
Safety grates for RCB culverts
Contractor Borrow
Misc. Bridge
Misc. Soils Design

APPENDIX D - As of June 1, 2015

Payrolls Drawer Types

Predetermined Wage Rate

APPENDIX E - As of June 1, 2015

Pay Items Drawer Types

Central Materials Input
Contract Modification Item Certs
District Materials Input
Materials Acceptance Report
Materials Source Report

Groupings in the Pay Items Drawer - used as needed

PCC Paving – Mix Design
PCC Paving – Contractor Quality Control Plan
PCC Paving – Maturity (Curves & Verification)
PCC Paving – PCC Plant Report
PCC Paving – Plant Monitor Gradations
PCC Paving – (Form 115) Air & Slump Test Results
PCC Paving – (Form 114) Beam Break Results
PCC Structure - Mix Design
PCC Structure – PCC Plant Report
PCC Structure – Plant Monitor Gradations
PCC Structure – (Form 145) Air & Slump Test Results
HMA Items – Mix Design
HMA Items – HMA Base Plant Report
HMA Items - HMA Charts
HMA Items – HMA Intermediate Report
HMA Items – HMA Surface Report
HMA Items - Mix Temps (Small Quantities)
HMA Items – Verification Aggregate Gradations

APPENDIX F - -DRAFT MATERIAL DOCUMENTATION CLARIFICATION

Single Document Basis of Acceptance			
Acceptance Method, IM 204 appendix Z or Mtls Acceptance Report	Document	Comments	Examples
Visual Approval by RCE	Document by an entry in Doc Express	The project inspector is to submit using a Comment and then the Project Inspector is to Transition to Received.	Burlap, Plastic film, Steel Posts for Silt Fence
As Per Plan	Compliance with the plans will be documented by an entry in Doc Express	The project inspector is to submit using a Comment and then the Project Inspector is to Transition to Received.	Guardrail Attenuators
Approved Source (Easily Identified)	Source of the material should be identified by the Project Inspector. Document by an entry in Doc Express.	The project inspector is to submit using a Comment and then the Project Inspector is to Transition to Received.	Engineering Fabric, Poured Joint Sealer, Wood Excelsior Mat, Silt Fence
Approved Source (Not Easily Identified)	Source of the material should be identified by the Project Inspector. This will require a document to be in Doc Express.	Products which cannot be easily identified in the field, such as traffic paint, will require a document in Doc Express. This should be entered by the Contractor or supplier.	Anti-strip Agent, Concrete Anchors, Concrete Sealer, Traffic Paint
Approved Source, Batch (Lot)	Verify that the material is from an approved source. Verify the Batch (lot) number. The information can be documented by an entry in Doc Express.	Check list maintained by Central Mtls, if the Batch (lot) has been previously tested a sample is not needed. District Mtls will sample if necessary & the report will be entered on Doc Express by the DME Batch numbers for admixtures will also be documented on plant report.	PCC Concrete admixtures

Batch (Lot) Acceptance	Record the batch or lot number by an entry in Doc Express. If sampled a test report will be entered as well.	Verify that batch or lot has been tested, a list is maintained by Ctl Mtls. Dist Mtls will secure a sample when required & report results to Doc Express.	White Pigmented Curing compound.
Certification Statement	A copy of the certification will be in Doc Express	The documentation with the certification statement will be entered by the Contractor or supplier.	Lead Bearings
Test Report	A copy of the test report will be in Doc Express	The IM 204 will specify who is responsible for the testing. They will sample, test and report the results to Doc Express.	Cable Guardrail, Electric circuit test, Torque wrench
Approved Catalog Cut	A copy of the reviewed Catalog cut will be in Doc Express.	The Catalog cut will be submitted for review by the contractor or supplier and entered in Doc Express according to the specification.	Lighting Materials, connectors and photoelectric controls
Fabrication Report	A copy of the fabrication report will be in Doc Express	The fabrication report is generated by District Materials and will be entered into Doc Express by the DME.	Structural Aluminum Fastners
Mill Test Report	A copy of the Mill test report will be in Doc Express.	The mill test report should be entered by the contractor or supplier. This may also be referred to as a mill certification. Be sure to verify that any product of steel or iron meets the Buy America requirements.	Steel Guardrail posts

Multiple Document Basis of Acceptance			
Acceptance Method, IM 204 appendix Z or Materials Acceptance Report	Document	Comments	Examples
Approved Source, Certification Statement	Verify that the material is from an approved source. A copy of certification will be in Doc Express.	The documentation with the certification statement will be entered by the Contractor or supplier. The Approved Source portion is included with the certification.	Concrete modular and segmental blocks
Approved Source, Fabrication Report	Verify that the material is from an approved source. A copy of fabrication report will be in Doc Express.	The fabrication report is generated by District Materials and will be entered into Doc Express by the DME. The Approved Source portion is included with the Fabrication Report.	Neoprene Bearings
Approved Source, Mill Certifications	Verify that the material is from an approved source. A copy of the mill certifications will be in Doc Express.	The mill certification should be entered by the contractor or supplier. Be sure to verify that any product of steel or iron meets the Buy America requirements.	Steel piling, uncoated rebar
Approved source, Catalog Cut	Verify that the material is from an approved source. A copy of the catalog cut will be in Doc Express.	A copy of the catalog cut should be entered on Doc Express by the contractor or supplier.	Steel castings
Approved Source, Certification Statement, Test Report	Verify that the material is from an approved source. A copy of the Certification Statement and the Test Report will be in Doc Express.	The documentation with the certification statement should be entered by the Contractor or supplier. The test report should be entered by the testing agency, either a third party Lab or the DME.	Asphalt binder and emulsion
Approved Shop Drawing, Catalog Cut	A copy of the approved shop drawing and catalog cut will be in Doc Express.	The shop drawing and catalog cut should be submitted for review by the supplier or contractor and entered in Doc Express	Structural Aluminum

		according to the specifications.	
Approved Catalog Cut, Certification Statement	A copy of the approved catalog cut and a copy of the certification will be in Doc Express.	The catalog cut should be submitted for review by the supplier or contractor and entered in Doc Express according to the specifications. A copy of the certification should be entered by the contractor or supplier.	Lighting materials wire and cable
Approved Shop Drawing, Fabrication report	A copy of the Approved shop drawing will be in Doc Express along with the Fabrication report.	The shop drawing should be submitted for review by the supplier or contractor and entered in Doc Express according to the specifications. The fabrication report will be entered by the DME.	Floor drains and steel expansion devices
Approved Source, Certified Truck Ticket or Form # 821278	Verify that the material is from an approved source. For aggregate paid by the ton collect certified truck tickets on the grade. A summary of aggregate shipments to the project should be submitted to Doc Express by the aggregate producer for non-proportioned aggregate .	It is not necessary to have a copy of a truck ticket in Doc Express. For proportioned aggregates verify the tickets at the plant site. Form #821278 may be used to certify aggregate that is not weighed over a scale.	Proportioned and Non-proportioned aggregate

Multiple Document Basis of Acceptance			
Acceptance Method, IM 204 appendix Z or Materials Acceptance Report	Document	Comments	Examples
Approved Shop Drawing, Approved Source, Certification Statement	Verify that the material is from an approved source. A copy of the Approved shop drawing and the certification statement will be in Doc Express.	The shop drawing should be submitted for review by the supplier or contractor and entered in Doc Express according to the specifications. The documentation with the certification statement will be entered by the Contractor or supplier.	Aluminum lighting poles
Approved Source, Approved Shop Drawings, Fabrication Report, Mill Certifications	Verify that the material is from an approved source. A copy of the approved shop drawings, fabrication report, and mill certifications will be in Doc Express	The shop drawing should be submitted for review by the supplier or contractor and entered in Doc Express according to the specifications. The mill certifications should be entered in Doc Express by the contractor or fabricator. The fabrication report will be entered into Doc Express by the DME.	Structural Steel
Approved Source, Approved Shop Drawings, Fabrication Report	Verify that the material is from an approved source. A copy of the Approved shop drawing and the fabrication report will be in Doc Express.	The shop drawing should be submitted for review by the supplier or contractor and entered in Doc Express according to the specifications. The fabrication report will be entered by the DME.	Bridge railing
Approved Source, Fabricator's trademark, Date of Manufacture, Certified Stamp, Certification Statement	Verify that the material is from an approved source. Check for the trademark and certified stamp. A copy of the certification statement will be in Doc Express	For precast concrete pipe a certified summary of items delivered to the project site will be entered into Doc Express by the contractor or supplier.	Handholes and concrete pipe

Approved Source, Fabricator's trademark, Date of Manufacture, DOT Inspection Stamp, Fabrication Report	Verify that the material is from an approved source. Check for the trademark and DOT inspection stamp. A copy of the fabrication report will be in Doc Express	The Fabrication report is generated by District Materials and will be entered into Doc Express by the DME.	Prestressed Concrete Beams, Concrete piling
Approved Source, DOT Inspection Stamp, Fabrication Report	Verify that the material is from an approved source. Check for the DOT inspection stamp. A copy of the fabrication report will be in Doc Express	The Fabrication report is generated by District Materials and will be entered into Doc Express by the DME.	Precast permanent barrier rail.
Approved Source, Certification of Grade, and Treatment Test Report	Verify that the material is from an approved source. The certification of grade and treatment report will be in Doc Express.	The certification of grade and treatment report will be entered by the contractor or supplier.	Treated wood products
Approved Source, Test Report, Steel Mill Certification	Verify that the material is from an approved source. The test report and mill certification will be in Doc Express.	The mill certification should be entered by the contractor or supplier. Be sure to verify that any product of steel or iron meets the Buy America requirements. Samples are normally taken by District Materials and the test report will be entered in Doc Express by the DME.	Anchor Bolts

Multiple Document Basis of Acceptance			
Acceptance Method, IM 204 appendix Z or Materials Acceptance Report	Document	Comments	Examples
Mill Certification, Rotational Capacity Test, Test Report	The mill certification, rotational capacity test and test report will be in Doc Express	The mill certification and rotational capacity test should be entered by the contractor or supplier. Be sure to verify that any product of steel or iron meets the Buy America requirements. Bolts, nuts and washers will be sampled by District Materials and the report will be entered on Doc Express by the DME. Check the IM's and specifications for field rotation capacity testing. If required this test report will also need to be filed in Doc Express by the RCE or DME.	Structural bolts nuts and washers
Approved Shop Drawing, Shipping Report	A copy of the approved shop drawing and shipping report will be in Doc Express.	The shop drawing should be submitted for review by the supplier or contractor and entered in Doc Express according to the specifications. The shipping report is generated by the supplier and should be entered into Doc Express by the contractor or supplier.	Sign Panels
Approved Source, Shipping Report, Certification Statement	Verify that the material is from an approved source. A copy of the shipping report and Certification Statement will be in Doc Express.	The shipping report and Certification statement is generated by the supplier and should be entered into Doc Express by the contractor or supplier.	Finished signs

<p>Mill Certifications, Test Report for Galvanizing</p>	<p>Mill Certifications and galvanizing test report will be in Doc Express.</p>	<p>Mill certifications should be entered in Doc Express by the contractor or supplier. Be sure to verify that any product of steel or iron or the coating there of meets the Buy America requirements. Be sure to verify that any product of steel or iron meets the Buy America requirements.</p>	<p>Galvanized rebar</p>
<p>Approved Source, Mill Certifications, Epoxy Certifications, Test Report</p>	<p>Verify that the material is from an approved source. Mill certifications, epoxy certifications and a test report will be in Doc Express.</p>	<p>The mill certifications and epoxy certifications should be filed by the contractor or supplier. Be sure to verify that any product of steel or iron or the coating there of meets the Buy America requirements. Samples will be taken by District Materials and reported by the DME.</p>	<p>Epoxy coated rebar</p>
<p>Approved Source, Approved Shop Drawings</p>	<p>Verify that the material is from an approved source. A copy of the approved shop drawing will be in Doc Express</p>	<p>The shop drawing should be submitted for review by the supplier or contractor and entered in Doc Express according to the specifications.</p>	<p>Pre-engineered pedestrian bridge</p>