

# CONTRACTOR/SUPPLIER DOC EXPRESS COOKBOOK – IOWA STYLE

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Instr Guide

- 1 New Company to get access to Doc Express  
**ONE person** in the company, go to [www.docexpress.com](http://www.docexpress.com)  
Register  
Alert Janet or Dean if you are the prime so they can give you access to a contract(s)
  
- 5 New user to Doc Express **but company already has access**  
Do **NOT** go to [www.docexpress.com](http://www.docexpress.com) and register  
Have another person in your company invite you to join  
Register after receiving their invitation e-mail  
Once registered you will automatically have the same access as other users in your company
  
- 6 Change Account Information  
Go to My Account screen  
Change personal information only
  
- 7 See other users in your organization  
Go to My Account screen  
Scroll down and all users will be listed along with their status
  
- 8 View contracts  
Go to Doc Express screen  
All contracts to which you have access are displayed  
You have a choice of line or grid view by selecting that icon located to the far right of the word Contracts
  
- 9 Tag field  
Go to Doc Express screen  
Click on Actions > Manage Tags  
This is a field where you can enter a job number or something that makes sense to you to describe the contract. DOT users cannot see this field  
Enter your choice – more than 1 user in a company can enter a tag for the same contract and all will be displayed  
Save

- 10 Mark a contract as a Favorite
  - Go to Doc Express screen
  - Click the word Favorite beside the contract of your choice
  - The contract will move to the top of your list of contracts
  
- 10 To remove a contract from being a Favorite
  - Go to Doc Express screen
  - Click the word Favorite
  - The contract will return to its normal order in the list of contracts
  
- 11 To see the number of submittals in a drawer that have had no action taken
  - Go to Doc Express screen
  - The number inside the badge beside each drawer indicates the number of submittals made to that drawer that have had no action taken since the initial submittal
  - If no badge beside the drawer, either all documents have been transitioned at least once or there are no documents in the drawer
  
- 11 Search for a contract
  - Go to Doc Express screen
  - The search field is always seen – can enter contract info of your choice
  - Can do an advanced search for prime contractors, letting dates, and contract statuses like locked or favorite
  
- 11 Filter options
  - The filter options change somewhat depending on whether you're in the list of contracts or in a drawer
  - Go to Doc Express screen
  - Click on the "X" in the middle of the screen under the Search field
  - Can use 1 or multiple filters at the same time
    - If you filter on different types one right after the other, be sure to allow the list of submittals to refresh before selecting the next type to filter on in case you have a slow connection.
  
- 11 Viewing Locked Contracts
  - Go to Doc Express screen
  - At the list of contracts, open the filter (click on "X" in middle of the screen)
  - Change the filter from All Contracts to Locked Contracts
  - To see active contracts again, change the filter back to All Contracts
  
- 12&42 Allow other subs/suppliers to view your submittals
  - Go to Doc Express screen
  - Open a contract
  - Click on Actions > Manage Access

Put a checkmark in Enable Downloads for whatever subs and/or suppliers you wish to allow to open the documents you submit in those specific drawers.

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

### 13 Notifications

Go to Doc Express screen

Click on Preferences > Notifications

#### **Progressed Document** option

These are real time notifications

Select to be notified on a drawer by drawer and/or document by document basis

#### **Completed Document** option

Select to be notified on a drawer by drawer and/or document by document basis

#### **Rejected Document** option

This is a real time notification

Select to be notified on a drawer by drawer and/or document by document basis

#### **Document Submission Reports**

These are sent daily

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

One report shows submittals from the previous day for every contract to which you have access

The other report shows only those contracts' submittals marked as your Favorite

### 14 Documents

Click on the word Documents in the yellow bar to the right of the Doc Express logo

To see all documents submitted to all drawers in all contracts

Have the option to filter several ways including by Document Types

### 14 Dashboard

Go to Doc Express screen

Informational only

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

Lists all documents that are past due

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

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

We use the late start date in this field so users can tell at a

glance if their contract should be starting or is past the late start date

- 15 Drawer Structure  
Informational only
- 17 Submitting Multiple Documents at the Same Time  
At the submit screen click on “Want to Upload Multiple Documents?”  
sentence at the top of the page  
Click in the arrow above Drag and Drop  
Select the documents to upload  
Choose the type and sign then Save
- 19 Initial Submittal Screens  
Informational only
- 20 Viewing Submitted Documents  
Top line is the title and just to the right is the type it’s linked to  
Next line displays the organization who submitted the document  
The number of comments and supporting documents are indicated just  
below the title  
Next is the date and time of the submittal along with the submitter’s  
company and name  
To the far right is the status of the document  
Below the status are the options you have for that document at that time
- 21 Revert Transition Option  
To “un-do” for a transition you made, click Actions > Revert Transition  
Only available if you are the last one to transition the document  
Cannot revert document back to Submitted status and then Remove it  
since there has been activity on the submittal
- 21 Due Dates  
Must be entered by a DOT user (is optional)  
If a submittal is overdue, will be noted under the title of the document  
These overdue documents, if any, are displayed in the Dashboard
- 22 Submitting to the **Contract Documents** drawer  
Go to Doc Express screen  
Open the Contract Documents drawer by clicking on it  
Click Submit  
Enter a title – suggested naming conventions for some documents  
in each drawer are in Appendix A of the user guide. If using  
a number, use 2 digits, if using a date, use 6 digits (eg  
06/24/16) **Main thing – be consistent!!**  
Select the appropriate type  
In the Attachment field, browse to the location of the submittal

Add Supporting Documentation if desired  
Enter a Comment if desired  
Save

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

- 24 Submitting to the **Pay Items** drawer  
Go to Doc Express screen  
Open the Pay Items drawer by clicking on it  
Click Submit  
Enter a title – suggested naming conventions for some documents in each drawer are in Appendix A of the user guide. If using a number, use 2 digits, if using a date, use 6 digits (eg 06/24/16) **Main thing – be consistent!!**  
Select the appropriate type  
In the Attachment field, browse to the location of the submittal  
Add Supporting Documentation if desired  
Enter a Comment if desired  
Sign by putting a checkmark in front of the signature statement  
Save

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

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

- 31 Submitting to the **Payrolls** drawer  
**ONLY THE PRIME CONTRACTOR IS TO SUBMIT TO THIS DRAWER**  
After you have already checked the payrolls received from the subcontractor(s) and signed them as usual  
Go to Doc Express screen  
Open the Payrolls drawer by clicking on it  
Click Submit  
Enter a title – PR followed by report number followed by week ending date (e.g. PR 01 w/e 06/25/16) is the suggested naming convention

Select the appropriate type – there is a type for each contractor  
In the Attachment field, browse to the location of the payroll  
Add Supporting Documentation if desired  
Enter a Comment if desired  
Save

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

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

- 32 Submitting to the **Working** drawer  
Go to Doc Express screen  
Open the Working drawer by clicking on it  
Click Submit  
Enter a title – suggested naming conventions for some documents in each drawer are in Appendix A of the user guide. If using a number, use 2 digits, if using a date, use 6 digits (eg 06/24/16) **Main thing – be consistent!!**  
In the Attachment field, browse to the location of the payroll  
Add Supporting Documentation if desired  
Enter a Comment if desired  
Save
- 33 To change and re-submit a document to Working drawer  
Go to Doc Express screen  
Open the Working drawer by clicking on it  
Click title of the document and save it to a location such as your hard drive  
Edit the document as desired and save it  
Beside the original submittal, click Resubmit document  
Browse to the location of the edited submittal  
Enter a comment if desired  
Save
- 34 Submitting to the **Shop Drawings** drawer  
Go to Doc Express screen  
Open the Shop Drawings drawer by clicking on it  
**Enter a title for the document using this naming convention- paren number of the PROJECT (not the contract in case of tied projects) followed by the county name & design number (if applicable) followed by a description of the submittal**  
Select the appropriate type  
In the Attachment field, browse to the location of the shop drawing  
Add Supporting Documentation if desired  
Enter a Comment if desired

Save

- 35 Re-submitting a shop drawing  
Go to Doc Express screen  
Open the Shop Drawings drawer by clicking on it  
Find the document to be edited and re-submitted as per the status  
If there is a marked up copy, double click on that submittal (not the title but the submittal by the previous user's name in the log) to view it  
Make the corrections noted and save it  
Click Resubmit  
Attach your edited document  
Enter a comment if desired  
Save
- 36 Submitting to the **Signature** drawer  
Go to Doc Express screen  
Open the Signature drawer by clicking on it  
Enter a title – suggested naming conventions for some documents in each drawer are in Appendix A of the user guide. If using a number, use 2 digits, if using a date, use 6 digits (eg 06/24/16) **Main thing – be consistent!!**  
Select the appropriate type  
In the Attachment field, browse to the location of the submittal  
Add Supporting Documentation if desired  
Enter a Comment if desired  
Sign your name & also put a checkmark in front of the signature statement  
Click Save
- 36 Signing in the Signature drawer  
Go to Doc Express screen  
Open the Signature drawer by clicking on it  
Beside the appropriate submittal with a Submitted status click Transition  
Select Signed by Contractor as the status  
Enter a comment if desired  
Add supporting documentation if desired  
Sign your name & also put a checkmark in front of the signature statement  
Click Save
- 38 **Plans** drawer  
Only DOT users submit to this drawer  
The most current set of plans should always be at the top of the list and should be displayed when clicking on the title
- 39 **Contract Signing** drawer  
ONLY the prime contractor has access to this drawer  
All contract documents are submitted here by the Office of Contracts

rather than being mailed to the contractor  
Prior to signing the contract, the performance bond must be verified  
A digital signature is NOT required to verify the performance bond  
A digital ID is required to sign the contract  
The first time you open this drawer, a wizard will take you through  
the process of obtaining the digital ID  
If you don't need/want a digital ID, ignore the wizard

## **GENERAL INFO FOR ALL DRAWERS -**

### To view the log for a document –

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

### To see the signature history (Contract Modifications, Contract Signing, & Signature drawers only)

Go to Doc Express screen  
Open any of the 3 drawers mentioned  
Select any submittal that has a status other than Submitted  
Click on the title of the document  
Choose to Open the document  
Scroll to the last page that is now attached to the document  
Contract Modifications –  
Signatures must be obtained in a specific order  
The last to sign is to mark it Completed  
Contract Signing –  
Contractors must sign first followed by the Office of Contracts who  
then transitions it to Completed status  
Signatures –  
There is no certain order required for signatures  
Different forms require different signatures

### To Remove a submittal

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

### Revert a Transition

If you need an “un-do” for a transition you made, click Actions > Revert Transition  
The option is available only if you are the last one to transition the document  
Cannot revert document back to Submitted status and then Remove it since  
there has been activity on the submittal



42 **IF YOU ARE THE PRIME CONTRACTOR**

Giving access to subs and suppliers –

Go to Doc Express screen

Open the contract

Click on Actions > Manage Access

Click on Add Organizations

Enter the sub's or supplier's name or partial name and click on it when displayed

Do NOT go through and individually select all users in a company when giving access – just click on the company name.

Click Next

For access to all drawers, click in the all access “box” then click on their name

For access to only certain drawers, click only on the contractor's name then at the Manage Access screen, put a checkmark in only the drawers to which you want them to have access

Click Update

To change access for a sub or supplier

Go to Doc Express screen

Open the contract

Click on Actions > Manage Access

Beside the appropriate name, add or remove access to drawers

Click Update

To remove complete access to a contract for a sub or supplier

Go to Doc Express screen

Open the contract

Click on Actions > Manage Access

Click on the red “x” to the far right of the contractor's name

45 Suggested Naming Conventions and the reasons why for some documents in each drawer

47 The types found in each drawer

51 Draft Materials Documentation Clarification