



Appia[®]

System Administrator's

Guide

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1. Overview

This document provides instructions for performing system management tasks and reference data tasks and is intended for system administrators and senior project managers only. You must have a system administrator role assigned in the Appia® service in order to perform the system management tasks. You must have a system administrator or senior project manager role assigned to perform reference data tasks.

To perform system management tasks in the Appia service, click the **System Mgt** option in the Sidebar menu on the Active Projects page after logging in. Then select My Business or Settings.

My Business Add, change or make users inactive in the Appia service. This includes establishing the security settings for a user. For more information about performing these tasks, see Chapter 2.

Settings You can set or change a variety of options that will determine how the Appia service operates in your agency. For more information about performing these tasks, see Chapter 3.

API Keys Use the Appia API key to create a token for information requests sent from other software to the Appia service. For information on performing these tasks, see Chapter 4.

Reference data helps keep your reference information up to date. For more information on managing reference data, please see Chapter 5.

2. My Business

If you do not have a license for the Appia software, please call customer support. You will not see a way to add users to your business or be able to start a new project until you have a license.

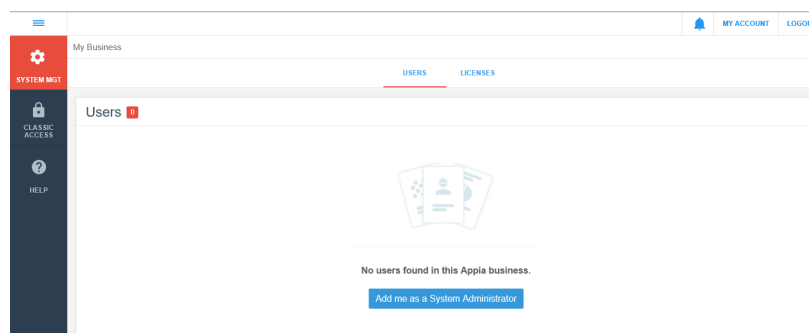


Figure 2-1. Add System Administrator Page

After you have the appropriate license for the Appia service, you must add yourself to your business as a system administrator. Once this is done, you can add other users, assign user roles, and work on Appia projects.

2.1 Users

The Users tab displays all users that have been added to your business in the Appia service. Users are sorted alphabetically.

As a system administrator, you can change a user's role or delete a user, add different electronic devices, such as a tablet or phone, for that user to access, and add more users to your business. You will also have permission to work on all projects in the Appia service for your business.

The default role is the user's access when first assigned to a project in the Appia service. This role can be changed for each project.

The number in the Projects column indicates the number of projects the user has access to in your business. This is based on the user's default role and if that role has been changed for any projects. Click the number to see the projects' ID and status.

The Status column shows whether the user has access to an active Appia account.

Name	Email	Default Role	Projects	Status
BC Brandy Clayton <small>Go Green Construction</small>	BClayton@gogreenconstruction.com	Read Only	6	Active
GS Gretl Summers <small>City Agency</small>	gretl.summers@cityagency.com	System Administrator	ALL	Active
GG Gretna Green <small>Go Green Construction</small>	GGreen@gogreenconstruction.com	Project Manager	8	Active
HD Heather Day <small>City Agency</small>	heather.day@cityagency.com	System Administrator	ALL	Active
SD Sabrina Donnelly <small>City Agency</small>	sabrina.donnelly@cityagency.com	Inspector	0	Inactive

Figure 2-2. Users Page

2.1.1 Add System Administrator

When you log in to the service for the first time, you must add yourself to your business as a system administrator.

1. From the USERS tab on the My Business page, click ADD ME AS A SYSTEM ADMINISTRATOR.
2. Read the Service License Agreement and click YES, I AGREE.

The Appia service adds you to the business as a system administrator and displays the use of one license on the LICENSES tab. Now you can add other users to your business and assign roles and access.

Once the initial system administrator role is assigned, no one else will see the ADD ME AS A SYSTEM ADMINISTRATOR button.

2.1.2 Add Users to Your Business

A user with an active account for any Infotech service can be given access to your business in the Appia service. Users are initially granted read-only access to all of your business's projects in the Appia service. Read Only and Reviewer roles do not require a license.

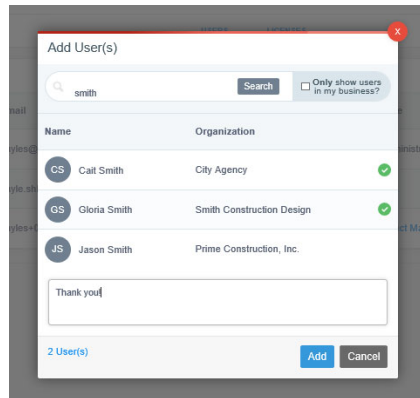


Figure 2-3. Add Users Window

1. From the My Projects page, select **System Mgt** in the Sidebar menu and select **My Business**
2. Click ADD USERS.
3. Enter the user name in the Search for User Name field.
4. If you want the Appia service to search only for users who are part of your business account, select the check box.
5. Click SEARCH.
6. Select the user to add to your business. The number on the bottom increases by one for each user selected. Click the number to see the names of the selected users.
7. If you are adding more than one user, enter the next name in the Search field and click SEARCH. A new list with users matching the name displays.
8. Select the user.
9. Add a personal note for all users, if desired.
10. Click ADD.

The Appia service displays a confirmation message. Click CLOSE in the message. The Appia service displays the added users on the Users tab and sends you an email listing the added users. The service also sends an email to the users who were added to your company.

The new users have access to all your projects in a read-only role. You can change the access and role at any time.

2.1.3 Roles and Access

Users are granted access in a read-only role to all projects when they are added to your business in the Appia service.

Roles are the security level of the user and are different than the roles assigned when users are first invited to join your business. There are several roles a user can have within the Appia service. Each business must have at least one System Administrator.

Each role combines the permissions needed for several related tasks and provide users with access to the parts of the service they need.

Read Only	Read Only users have read-only access to all areas. They cannot modify anything. Read Only roles do not require a license.
Reviewer	Reviewers review daily reports and daily diaries. They can see all projects in the Under Construction phase but are only able to use the Mark as Reviewed function for the daily reports and daily diaries. Reviewer roles do not require a license.
System Administrator	System Administrators have full read and write access to all functional areas in the Appia service and can mark daily reports and daily diaries as reviewed. They can also submit daily reports and change orders added by other users.
Senior Project Manager	Senior Project Managers can add and change a project in the New phase. They have Project Manager access in the Construction phase.
Project Manager	Project Managers can only see projects to which they are assigned in the Under Construction and Completed phases. They have full write access to all areas of their assigned projects in these phases.
Inspector	Inspectors have the ability to add daily reports and change orders, and modify and submit daily reports and change orders that they have added. They can add and remove project subcontractors, start and stop contractor time charges, add and remove unattached items and add, change and remove project materials.

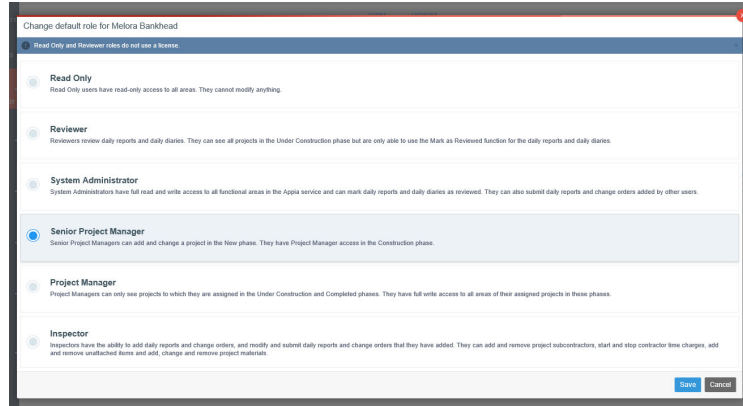


Figure 2-4. Appia User Roles

System administrators can change the role and access at the global or level project level. Access to completed projects can't be changed.

2.1.4 Change User Roles and Access

A user is assigned a default role in the Appia service, used each time the user is assigned to a project and when a new project is created.

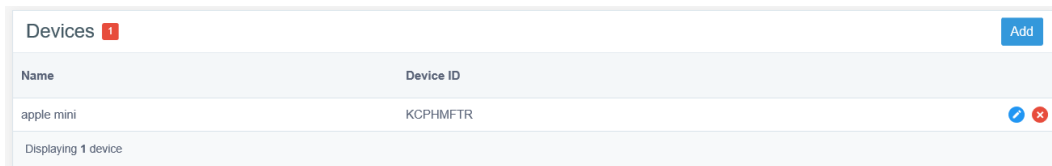
Read-only and reviewer roles do not require a license. You will see a message if you do not have enough licenses to assign another role. You cannot change a licensed role to a non-licensed role if the user has at least one device.

1. From the My Business page, select the default role for the user whose role you want to change. The Appia service opens the list of roles.
2. Select the new user role and click save.
3. To change project access, select the numbered project indicator in the Projects column. The Appia service opens the user's Projects window.
4. To select all the projects at once, click the Remove All Access check box.
5. Select or clear the check boxes for project access.
6. When you are finished, click REMOVE ACCESS.
7. Click OK in the remove confirmation window.

The Appia service returns you to the Users list and displays the new role and updated project indicator number. The service also updates the number of licenses in use, if necessary, on the Licenses tab.

2.2 Devices

If a user is planning on using the Infotech Mobile Inspector application for on-site daily reporting, you can link the user's tablet or other mobile devices to the user's account in the Appia service. This will send projects to which the user has access to the mobile device. A device can be assigned only once per agency.



Name	Device ID
apple mini	KCPHMFTR

Figure 2-5. Devices

Only users with licensed roles can have devices listed.

2.2.1 Add or Edit a Device

The user must download the Infotech Mobile Inspector app and give you the device ID before you can add the user. The device ID is located on the About page in the Infotech Mobile Inspector app.

1. From the My Business page, click Devices for the user.
2. Click ADD or click the pencil EDIT icon for the device.
3. Enter or update the name of the user and the device ID.
4. Click SAVE.

The Appia service saves the device and returns to the Devices page.

2.2.2 Delete a Device

When you delete a device, the user will no longer be able to see their projects.

1. From the My Business page, click Devices for the user.
2. Click the X for the device you want to delete.
3. Click OK in the delete confirmation window.

The Appia service removes the device and remains on the Devices page.

2.3 Delete Users

You cannot delete a user that has at least one device. You can delete yourself only if you are the sole user listed.

1. From the My Business page, click the X for the user you want to delete.
2. Click OK in the delete confirmation window.

The Appia service deletes the user and frees any license held by the user. If you deleted a user in error, you must add the user back to the Appia service.

2.4 User Licenses

Only one Appia account is needed for your business, though all users of that account need their own licenses. Read-only and reviewer roles do not require licenses. Users with those roles are not displayed on this page.

You can see the license information on the License tab. The Appia service displays the number of licenses purchased and the number used, plus the names and details of each license holder. The system displays the number of projects to which the user has access and displays ALL for system administrators.

You can purchase additional licenses if necessary.

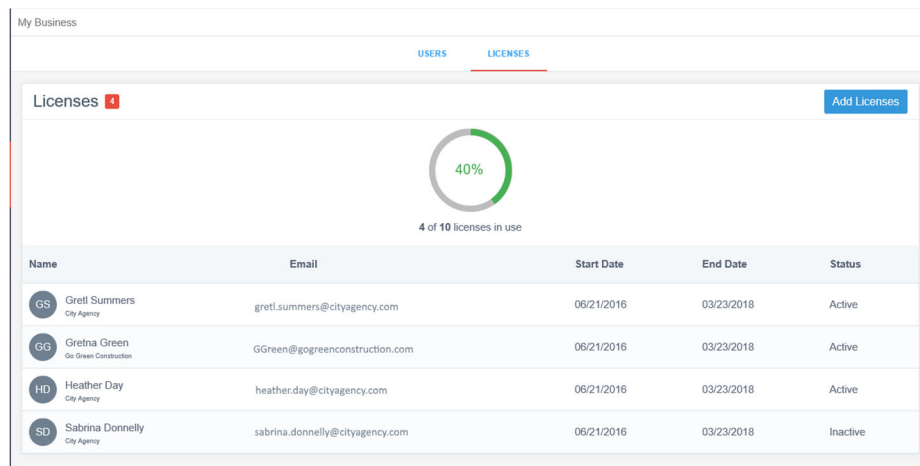


Figure 2-6. Appia License Usage

1. From the My Business page, select the LICENSES tab.
2. If you need additional licenses, click ADD LICENSES to go to the Appia ordering page.
3. Click CURRENT CUSTOMER and enter your information.

3. Settings

Use the Appia global settings to create a template to use for report files and to set the rules for payment and stockpile retainage and work overages. Changes to the global settings affect only new projects.

Use the project settings to change the general and construction settings and update user roles for a project. Changes to the settings on the project level will override the global settings. Once project settings are saved, the Appia service will not use any global settings for the project.

Changes to project settings do not affect reports for change orders or payments already submitted for approval.

If a retainage rule changes, the Appia service will either retain enough money to make up the difference or not withhold any money if the amount has been met through previous retainage.

3.1 General Settings

General settings set the default value for features in the Appia service that aren't construction related.

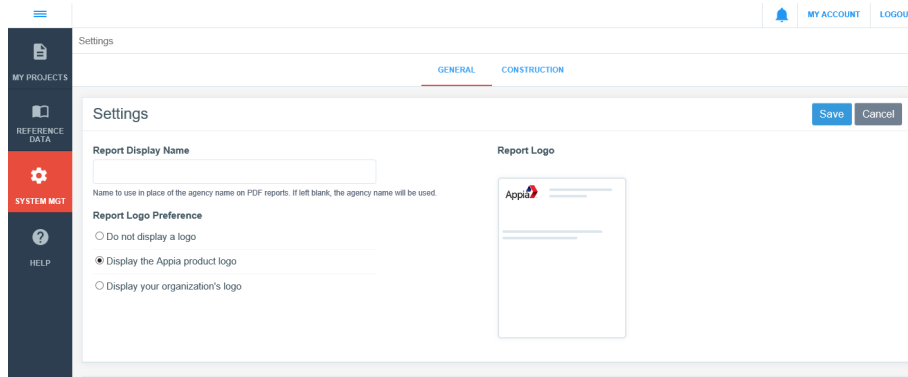


Figure 3-1. General Settings

Report Display Name

Enter the name you wish to see on PDF reports if the agency name isn't being used. Leave it blank to use the agency name. This name will appear at the top of every PDF report in the Appia service.

Report Logo Preference

Select the option to use for a logo on your reports. This logo will appear at the top of every PDF report in the Appia service.

If you decide to display your organization's logo, use the Report Logo section to upload the file.

Report Logo

Use to upload your logo.

1. From the My Projects page, select **System Mgt** in the Sidebar menu and select **Settings** or select the project from the My Projects page, and click **More** and then **Project Settings** in the Sidebar menu.
2. Click the **GENERAL** tab.
3. Enter or change the name in the Report Display Name field if you want the name on the reports to be different than your agency name.
4. Choose your Report Logo Preference option.
5. If you are displaying your company logo, click **BROWSE** in the Report Logo field. Navigate to and select the logo, then click **OPEN**.
6. Click **SAVE** when you are finished, or click the **CONSTRUCTION** tab to update the construction settings.

If you click SAVE, the Appia service applies the general settings and returns you to the My Projects page.

3.2 Construction Settings

Construction settings set the default value for features in the Appia service that are construction related.

Figure 3-2. Construction Settings

Payment Retainage Rule

Sets whether the retainage for the payment should be a cap on the percentage based on the awarded or authorized project amount, or if retainage takes place for the last percentages of the project. You can also choose to set a fixed dollar amount or not cap the retainage amount at all.

If you selected one of the options to retain the last set percentage of the project, the check box for Retain stockpile advancements will be automatically selected.

If you change the retainage during a project, the Appia service will either retain enough money from the current payment to make up the difference or not withhold any money if the amount has been met through previous retainage.

Stockpile Retainage Rule	Sets whether a percentage of each stockpile advancement is withheld from each payment. The percentage is set when the payment is added (see the <i>Appia User's Guide</i>). If you selected to start payment retainage after a percentage of the project has been paid, the check box for Retain stockpile advancements will be automatically selected.
Worksheet Calculations Rule	Sets whether worksheet calculations will be used to determine the quantity placed for item postings in a daily report. This setting can't be changed in an under construction project.
Payment for Work Overages Rule	Determines whether to pay and how much to pay if an item goes over its authorized quantity.
Daily Report Carry Over Rules	Determines what daily report information from the previous report to display when creating a new daily report.
Daily Diary Carry Over Rules	Determines what daily report information to display when creating a daily diary.
Signature Line for Payment Reports	Sets the signature line on any payment report so approving authorities can sign off on the payments.
Signature Line for Change Order Reports	Sets the signature line the change order details report so approving authorities can sign off on the changes.

You can format the text for the signature lines using the icons on top of the text boxes. If needed, rest your mouse cursor over a formatting icon to see what it does. Highlight the text that you want to format, then click the icon. The Appia service applies the formatting to the highlighted text.

If a retainage rule changes, the Appia service will either retain enough money to make up the difference or not withhold any money if the amount has been met through previous retainage.

1. From the My Projects page, select **System Mgt** in the Sidebar menu and select **Settings** to change the global construction settings or select the project from the My Projects page, and click **More** and then **Project Settings** in the Sidebar menu.
2. Click the CONSTRUCTION tab.
3. Choose your Payment Retainage Rules option. Enter or change the percentage or the dollar amount to cap the retainage if needed. The new cap will be calculated and displayed on the next payment

4. Choose your Payment for Work Overages Rule option. Enter or change the percentage if needed.
5. Select or clear the Stockpile Retainage Rule check box.
6. Select or clear the Worksheets Calculations Rule check box.
7. Enter or change the information for payment report signatures in the Signature Line for Payment Reports field. Use the underscore (`_`) on your keyboard if you want to create a line.
8. Enter or change the information for change order report signatures in the Signature Line for Change Order Reports field. Use the underscore (`_`) on your keyboard if you want to create a line.
9. When you are finished, click **SAVE**, or click the **GENERAL** tab to update the general settings.

If you click **SAVE**, the Appia service applies the construction settings and returns you to the My Project page if you were changing the global settings.

3.3 Project Settings

Project settings are identical to the global settings but affect only the specific project. You can also change the security of a user who has access to a project. Once the project settings are saved, the Appia service will not use any global settings for the project.

1. Select the project from the My Projects page.
2. Click **More** and then **Project Settings** in the Sidebar menu.
3. Click the **GENERAL** or **CONSTRUCTION** tabs to change the project settings. See the agency settings for more information.
4. Click **SAVE**.

The Appia service updates the project settings and returns you to the project Overview page.

3.3.1 Project Security

Users are assigned a default role in the Appia service used for any project a user has access to. You can change a user's role for a specific project to give or limit that user's access to a project. You can also completely remove a user from your project.

Name	Email	Default Role	Projects	Status	Devices
AD Annie Dorien City Agency	adorien@cityagency.com	Read Only	3	Active	Devices
BC Brandy Clayton Go Green Construction	brandy.clayton@gogreenconstruction.com	Reviewer	5	Active	Devices
GR Greg Sibley Go Green Construction	greg.sibley@gogreenconstruction.com	Read Only	4	Active	Devices
GS Gretl Summers City Agency	gsummers@cityagency.com	System Administrator	ALL	Active	Devices
GG Gretha Green Go Green Construction	gretha.green@gogreenconstruction.com	Project Manager	5	Active	Devices
HD Hannah Imbalzano City Agency	himbazono@cityagency.com	System Administrator	ALL	Active	Devices
RU Rob Upshaw State Agency	rob.upshaw@stateagency.com	Inspector	5	Active	Devices
TP Ted Perrig City Agency	tperrig@cityagency.com	System Administrator	ALL	Active	Devices

Figure 3-3. Project Security

Add Users

You can add a user who has been added to your business in the Appia service to your project.

Add User(s)

Search for User Name

Name	Organization
BC Brandy Clayton	Go Green Construction
SD Sabrina Donnelly	City Agency

0 User(s)

Figure 3-4. Add Project Users

1. Click **ADD USER** from the **PROJECT SECURITY** tab. The Appia service displays any user who has been added to your business but does not have access to your project.
2. Select the users and click **ADD**.

The Appia service adds the user to your project in its default project role.

Assign Project Role

You can assign a project role to a user who has access to your project. You cannot assign a system administrator role at the project level. In addition, users with read only or reviewer default roles cannot be assigned a project role that requires a license.

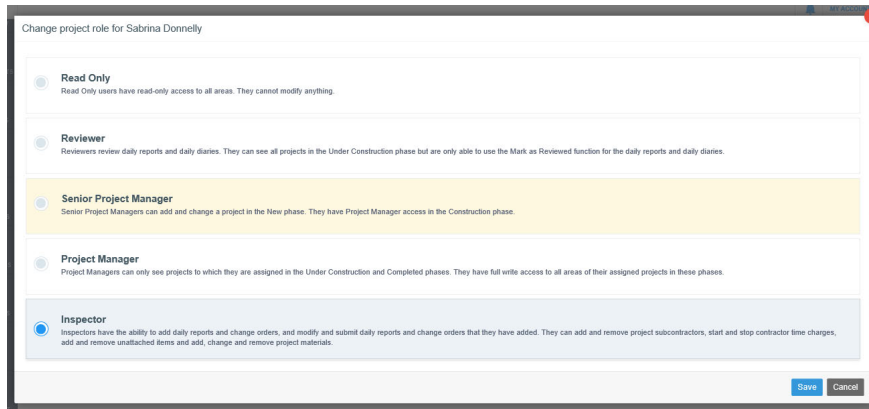


Figure 3-5. Assign User Project Role

1. Click Assign Project Role on the PROJECT SECURITY tab. The Appia service displays the roles available for that user.
2. Select the role.
3. Click SAVE.

The Appia service assigns the role and returns you to the Project Security tab.

Remove User

You can remove a user's access to your project.

1. Click the X for the user on the PROJECT SECURITY tab.
2. Click OK in the delete confirmation window.

The Appia service removes the user from your project.

4. API Keys

Use the Appia API key to create a token for information requests sent from other software to the Appia service.

You can associate access to the API keys for new, under construction, or completed projects.

4.1 Create a New Key

1. From the My Projects page, select **System Mgt** in the Sidebar menu and select **API Keys**.
2. Click **ADD API KEY**. The Appia service opens the New API Key page.
3. Enter a name for the API key. This could be the name of the payment system or something else easily identifiable.
4. Click **GENERATE API KEY**.



The screenshot shows a web form titled "New API Key". At the top right of the form area are two buttons: "Generate API Key" (in blue) and "Cancel" (in grey). Below the title is a text input field labeled "Name" with a red asterisk indicating it is required. The text "Payment System" is entered into this field.

Figure 4-1. New API Key

The Appia service creates the token to be used for any requests sent to the Appia API.

Copy the token and save it in a secure location. Once you navigate away from the API Keys page, you will not be able to access the token again.

4.2 Associate Projects to an API Token

Once the API key is created, you can associate it with Appia projects.

1. Select the name of the key on the API Keys page.
2. Click ASSOCIATE PROJECTS. The Appia service displays a list of available projects.
3. Select the check box for each project. Click the check box at the top to select all projects.
4. Click ADD.

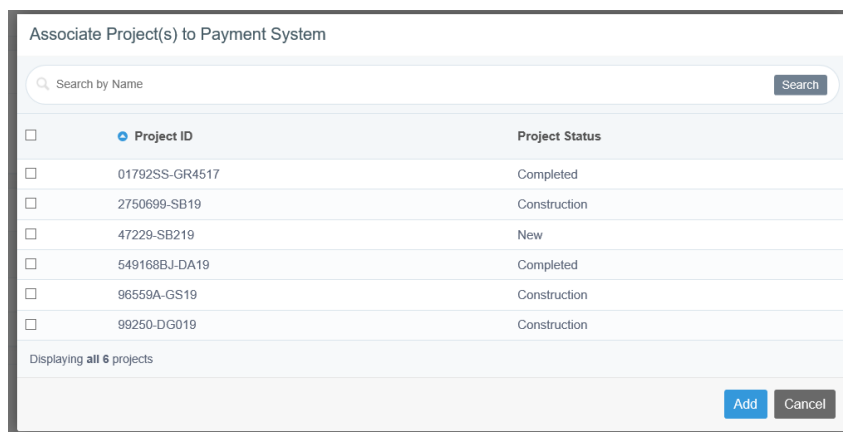


Figure 4-2. Associate Projects Window

The Appia service associates the selected projects with the API token.

4.2.1 Computer Administrator

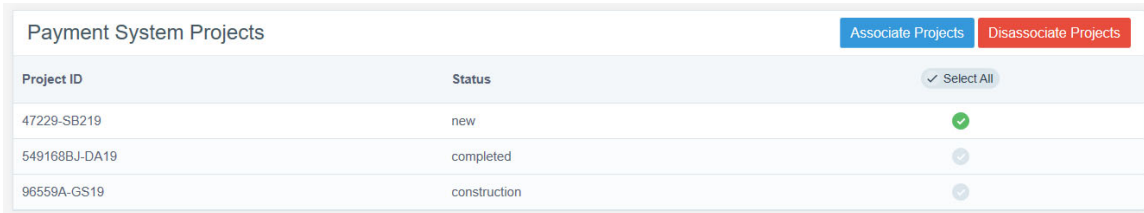
Your computer administrator will need to know when projects are ready to be added to the API. The API information for computer administrators is located at www.appia.net/API.

4.3 Disassociate Projects to an API Token

You can remove projects from the associated API key. Removed projects will no longer be available from that key.

1. Select the name of the key on the API Keys page.
2. Select the projects you want to disassociate with the token. Click SELECT ALL to select all the associated projects.

3. Click DISASSOCIATE PROJECTS.
4. Click OK in the warning window.



Project ID	Status	<input checked="" type="checkbox"/> Select All
47229-SB219	new	<input checked="" type="checkbox"/>
549168BJ-DA19	completed	<input type="checkbox"/>
96559A-GS19	construction	<input type="checkbox"/>

Figure 4-3. Disassociate Projects Window

The Appia service removes the project associations.

4.4 Regenerate Auth Token

If you lose your API key, you can generate a new one. Your projects will be associated with the new key, but you will need to replace the original key in the interfacing software.

1. Select the name of the key on the API Keys page.
2. Click REGENERATE AUTH TOKEN.
3. Click OK in the confirmation message.

The Appia service deletes the current key and generates a new one. Replace the original key in the interfacing software.

4.5 Delete API Key

When you delete a key, you'll lose any project association and other software products won't be able to access the Appia API with this key.

1. From the API Keys page, click the **X** for the key.
2. Click OK in the confirmation window.

5. Reference Data

Reference data refers to the lists of information kept in the Appia service, from items to contractors to materials.

1. Select **Reference Data** in the Sidebar menu
2. Select the reference data.

Only the system administrator and senior project manager can manage all reference data values. A project manager can see and export reference data values. Other roles may have access to different parts of the reference data.

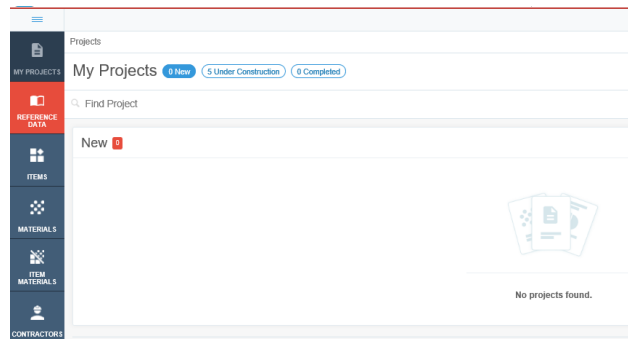


Figure 5-1. Reference Data Menu

Items	Lists all the Items entered into the Appia service.
Materials	Lists all the materials entered into the Appia service.
Item Materials	Lists the material and item associations entered into the Appia service.
Contractors	Lists all the contractors entered into the Appia service.
Lists	Lists the different drop-down menu items in the Appia service.

All reference data except lists can also be imported and exported. See Sections 5.1 and 5.3.

5.1 Import Reference Data

You can import a .CSV file of items, materials, or contractors into the appropriate reference list. You can also import reference list values (see Section 5.2). Only the system administrator and senior project manager can use this function. Importing updated information does not change the information already in use in a project.

The Appia service will not import any files that contain errors. The location and type of error will be displayed.

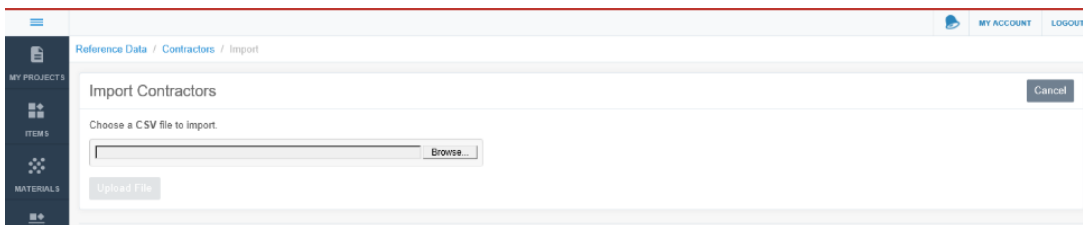


Figure 5-2. Import Contractors

1. Select **Reference Data** in the Sidebar menu and select the type of reference data to import.
2. Click **IMPORT**.
3. Click **BROWSE**.
4. Navigate to and select the .CSV or Excel file that contains the reference data.
5. Click **OPEN**.
6. Click **UPLOAD FILE**.

The Appia service displays a small sample of the reference data in the file.

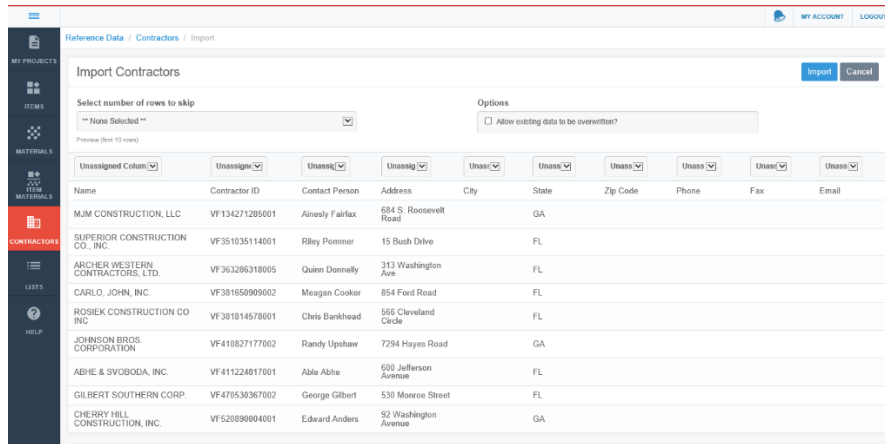


Figure 5-3. Import Reference Contractors

7. If your file includes header information that is not part of the reference data, select those rows in the Select number of rows to skip field. In Figure 5-3, the first row is the header information and not part of the reference data.
8. If you want your current reference data list to be overwritten, select the check box in the Options section that states Allow existing data to be overwritten. This will replace any reference data that is in both the current list and the imported reference data file (according to the reference data ID). Reference data in the current list but not in the file will remain unchanged, and reference data that is in the file but not in the current list will be added.
9. If you do not allow the existing data to be overwritten, any reference data that is in the current list, regardless of whether it is also in the imported reference data file (according to the reference data ID), will remain unchanged. Reference data that is only in the imported reference data file will be added to the current list.
10. Select the drop down list above each column to assign the column to a field. You must assign the required fields for your reference list. The Appia service replaces the column name.
11. Once all the columns are assigned, click IMPORT. Depending on the size of the file, it may take some time to import.

When the import is complete, the Appia service displays the number of rows that have been imported successfully or any errors that may have occurred.

5.2 Import Reference Data Lists

You can import values into your reference data lists. Importing values does not override the values already in the list.

1. Select **Reference Data** in the Sidebar menu and select **Lists**.

2. Click IMPORT for the list you want to import.
3. Click BROWSE or CHOOSE FILE (depending on your browser).
4. Navigate to and select the .CSV or Excel file that contains the reference data list.
5. Click OPEN.
6. Click UPLOAD FILE.

The Appia service displays a small sample of the reference data in the file.

Unassigned Column	Unassigned Column	Unassigned Column	Unassigned Column	Unassigned Column	Unassigned Column	Unassigned Column
Corridors	State	Counties	Districts	Division	Municipalities	Regions
Viking Road Corridor	New York	Rockland	District 8	Brooklyn	Albany	Region 1
6th Avenue Corridor	Florida	Nassau	District 9	Manhattan	Cayuga County	Region 2
Eastern	Iowa	Westchester	District 12	Western	New York City	
Northern	Ohio	Sussex	Northern	Eastern		
	New Jersey	Passaic	Eastern			
	Georgia	Bergen				
	Alabama					

Figure 5-4. Import Reference Counties

7. If your file includes header information that is not part of the reference data, select those rows in the Select number of rows to skip field. In Figure 5-4, the first row is the header information and not part of the reference data.
8. Select **Values** from the Unassigned Column drop down menu for the column containing the list you are importing.
9. Click IMPORT.

When the import is complete, the Appia service returns you to the Lists page and displays the number of rows that have been imported successfully or any errors that may have occurred.

5.3 Export Reference Data

You can export the items list, materials list, and contractors list into .CSV files, provided you have the correct permissions.

The Appia service exports the active list. For example, if you searched for all items with a unit of CY and then exported the item list, only the items with the unit of CY will be exported.

The Appia service exports:

- The item ID, description and unit
 - The material description, unit, material ID, and requirements
 - The contractor ID and organization, plus contact information and whether it is a DBE/MBE/WBE
1. Select **Reference Data** in the Sidebar menu and choose **Items**, **Materials**, or **Contractors**.
 2. Use the search feature if necessary.
 3. Click EXPORT.

Once you click EXPORT, you will be given the option to save or open the file.

5.4 Search Reference Data

Use the Search function to find particular reference data. You can search by any of the fields visible on the reference page.

You do not have to include the complete search criteria. For example, if you are searching for microsurfacing, you can enter *mirco* and the Appia service will find those letters as part of the search.

1. Select **Reference Data** in the Sidebar menu and select the reference data to search.
2. Enter text in the Search field and click SEARCH.

The reference list changes to show the data that meet the criteria. A match is any record that contains the text entered.

To see the entire reference list again, clear the Search field and press ENTER.

If you wish the search criteria to match only one field, click the Advanced Search tab (represented by the three lines) beneath the Search field. Enter the information in the respective fields and press ENTER to search. The advanced search may not be available for all reference data.

5.5 Items

An item is the smallest unit of work identified for a project. The Items page lists all the items entered into the Appia service. From this page you can view and manage Appia item data.

Select **Reference Data** in the Sidebar menu and choose **Items**. The Appia service brings you to the Items page. Here you can add, delete, or change item information, and import or export an item list (see Sections 5.1 and 5.3). Click any of the column headings to sort by that heading.

Any changes to associated materials must be done through the Item Materials page.

5.5.1 Add or Edit Items

Changing an item in the reference data does not change the item already in use in a project. If the item is associated with a material, you will see the association in the item details.

Any field marked with an asterisk is required.

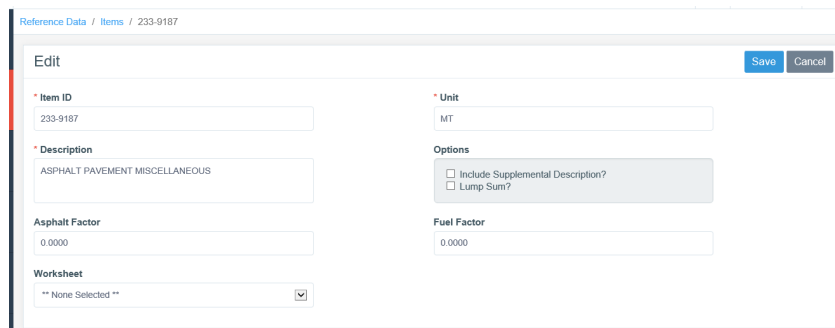


Figure 5-5. Editing Items

1. Select **Reference Data** and then **Items** in the Sidebar menu.
2. Click **ADD** or click the Item ID to edit an item.
3. Enter or update the item information in the appropriate fields. The Item ID, Description, and Unit are required.
4. If you are associating an item with a worksheet, add the worksheet to the reference data first (see Section 5.8).
5. Click **SAVE**.
6. If you are adding an item, the Appia service adds the reference item to the list and displays a successfully saved message. Click Add Another? to add another item, or click Items in the navigation trail to return to the Items page.

7. If you are editing an item, click [Items](#) in the navigation trail to return to the Items page.

5.5.2 Delete Items

You can delete items that have already been assigned to a project without affecting the project.

1. Select **Reference Data** and then **Items** in the Sidebar menu.
2. On the Items page, click the X next to the item you would like to delete.
3. Click OK in the delete confirmation window.

5.5.3 Item Material Associations

Items in the item reference list will display associated materials in the item details. These materials are added to a project when the item is added to a project.

Item material associations must be imported with the item or materials list. You cannot add any associations within the Appia reference lists, though you can add materials to an item within a project.

You can delete the association by clicking the X for the material.

5.6 Materials

Materials are articles or supplies that are required, consumed, or used in placing a project item during the construction of the project. Some items in the item reference list contain associated materials. A work item can have any number of materials, or none at all. For example, a Mobilization item contains no materials, a Steel H Piles, 14" item has only one material (14" Steel H Pile), and a Concrete item is made up of many materials (water, cement, aggregate, admixtures, etc.).

You can add, delete, or change material information, search for a specific material (see Section 5.4), and import or export a materials list (see Sections 5.1 and 5.3). Click any of the column headings to sort by that heading.

Description	Unit	Material ID	Requirements
2 INCH CONDUIT, PAVED ISLAND	LF	2301-4877020	
AGGREGATE FOR MICROSURFACING	TON	2319-9990104	
APRON, LOW CLEARANCE CONCRETE, EQUIVALENT DIAMETER 36 IN	EACH	2416-0102236	
APRON, LOW CLEARANCE CONCRETE, EQUIVALENT DIAMETER 72 IN	EACH	2416-0102272	
APRON, LOW CLEARANCE CONCRETE, EQUIVALENT DIAMETER 84 IN	EACH	2416-0102284	
BEAMS, PRETENSIONED PRESTRESSED CONCRETE, BTB95	EACH	2407-0562095	
BEAMS, PRETENSIONED PRESTRESSED CONCRETE, BTC100	EACH	2407-0563100	
BEAMS, PRETENSIONED PRESTRESSED CONCRETE, BTC105	EACH	2407-0563105	
BEVELED PIPE AND GUARD, 24 INCH	EACH	2417-5095624	
BLADING AND SHAPING SHOULDER MATERIAL	STA	2214-7450050	
CLEARING AND GRUBBING	UNIT	2101-0850002	
COMPACTION WITH MOISTURE CONTROL (STRUCTURES)	CY	2402-0875150	
CULVERT, CONCRETE ROADWAY PIPE, 78 IN. DIA.	LF	2416-1180078	
CULVERT, LOW CLEARANCE CONCRETE ROADWAY PIPE, EQUIVALENT DIAMETER 24 IN	LF	2416-1200224	
CULVERT, LOW CLEARANCE CONCRETE ROADWAY PIPE, EQUIVALENT DIAMETER 36 IN	LF	2416-1200236	
CULVERT, LOW CLEARANCE CONCRETE ROADWAY PIPE, EQUIVALENT DIAMETER 72 IN	LF	2416-1200272	
CULVERT, LOW CLEARANCE CONCRETE ROADWAY PIPE, EQUIVALENT DIAMETER 84 IN	LF	2416-1200284	
CULVERT, UNCLASSIFIED ENTRANCE PIPE, 42 IN. DIA.	LF	2432-3732042	

Figure 5-6. Material Reference List

5.6.1 Add or Edit Materials

Changing a material in the reference data does not change the material already in use in a project. If the material is associated with an item, you will see the association in the material details.

Any field marked with an asterisk is required.

Reference Data / Materials / Material

Edit Save Cancel

* Material ID

* Unit

* Description

Requirements

* Item Usage Rate

Figure 5-7. Edit Materials

1. Select **Reference Data** and then **Materials** in the Sidebar menu.
2. Click **ADD** or click the description and then **EDIT** to edit a material.
3. Enter or update the material information in the appropriate fields. Only the **Description** and **Unit** are required.
4. Click **SAVE**.
5. If you are adding a material, the Appia service adds the reference material to the material list and displays a successfully saved message. Click Add Another? to add another material, or click Materials in the navigation trail to return to the Materials page.

6. If you are editing a material, click [Materials](#) in the navigation trail to return to the Materials page.

5.6.2 Delete Materials

You can delete materials that have already been assigned to a project without affecting the project.

1. Select **Reference Data** and then **Materials** in the Sidebar menu.
2. Click the X next to the material you would like to delete.
3. Click OK in the delete confirmation window.

5.6.3 Material Items Associations

Materials in the material reference list will display associated items in the material details. These materials are added to a project when the item is added to a project.

Material item associations must be imported with the item or materials list. You cannot add any associations within the Appia reference lists, though you can add materials to an item within a project.

You can delete the association by clicking the X for the item.

5.7 Reference Item Materials

You can associate a material with items in the Item Materials page. When the associated item is entered into a project, the material is automatically added as well. Only system administrators and senior project managers have the ability to create reference data item material associations.

You can add, delete, or change material information, and import or export a materials list (see Sections 5.1 and 5.3). Click any of the column headings to sort by that heading.

If an item material association already exists, the up arrow next to the item ID can be selected. Click the arrow to see the materials and usage rate associated with the item.

Item ID	Description	Unit	Materials
010-2201	SPECIAL DETOUR (DETOUR 1) 2002/7812201	LS	0
020-0205	TURNOUT CONSTRUCTION (ASPHALT)	TN	0
100-0100	CONTRACTOR CERTIFIED CROSS SECTIONS MA-1001-4000-01	LS	0
100-0100	TRAFFIC CONTROL - PRECIS-5008-0A(100) 01	LS	0
101-1000	MOBILIZATION - CSSTP-0008-00007 01	LS	0
101-1000	FIELD LABORATORY	EA	1
101-1000	FIELD ENGINEERS OFFICE TP-3	EA	0
100-0100	TRAINING VEHICLES	HR	0
101-1000	EROSION CONTROL, CHECK DAM, SPECIAL DESIGN	EA	3

Description	Unit	Material ID	Usage Rate
Reflective Marker	ea		50.000 ea/EA
SAND, MORTAR (MS)	LSB		23.000 LS/EA
Water Main, PVC	in		475.000 in/EA

Figure 5-8. Item Materials

5.7.1 Add a Material Association to an Item

Once you are on the Item Materials page, you can add materials to an item.

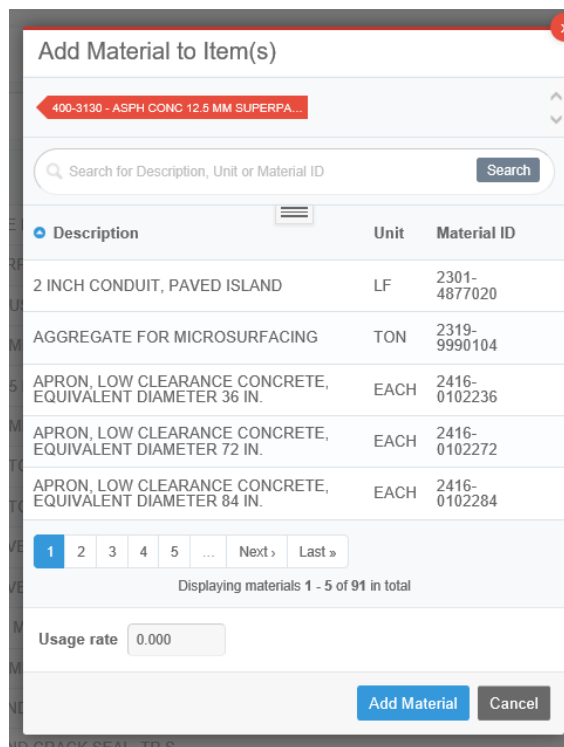


Figure 5-9. Add Materials to Item(s) Window

1. Select **Reference Data** and then **Item Materials** in the Sidebar menu.
2. Click the check box for the item you want to associate with a material. You can select more than one item at a time provided the material usage rate is the same for each item. You can also click the uppermost check box to associate one material with all listed items.
3. Click the **ADD MATERIAL** button in the Item Materials header. The Appia service displays the Add Material to Item(s) window.

4. Click the material description to select a material from the list. You can filter the list to find a specific material. A check mark will appear next to the selected material.
5. Enter the material's usage rate in the Usage rate field.
6. Click **ADD MATERIAL** to add the material to the item or click **CANCEL** to leave the page without adding the material.

The Appia service takes you back to the Item Materials page. Click the arrow next to the item ID to see the associated materials.

5.7.2 Deleting a Material Association

You can delete a material and item association from the Item Materials page. Deleting reference data material associations will not affect any that are in use in a project.

1. Select **Reference Data** and then **Item Materials** in the Sidebar menu.
2. Click the up arrow next to the item ID.
3. Click the X next to the material association you would like to delete.
4. Click **OK** in the delete confirmation window.

5.8 Worksheets

The Appia service contains several worksheets for calculating the quantity placed for items in a daily report. Users enter measurements or variables in order to find the quantity.

Worksheets must be associated with an item and the Worksheets Calculations Rules must be selected in the construction settings in order to use these calculations. Changing a worksheet association in the reference data does not change the item already in use in an under construction project. If the worksheet is associated with an item, you will see the association in the item details.

Select **Reference Data** in the Sidebar menu and choose **Worksheets**. The Appia service brings you to the Worksheets page. Here you can add and delete worksheets, and associate items with the worksheets.

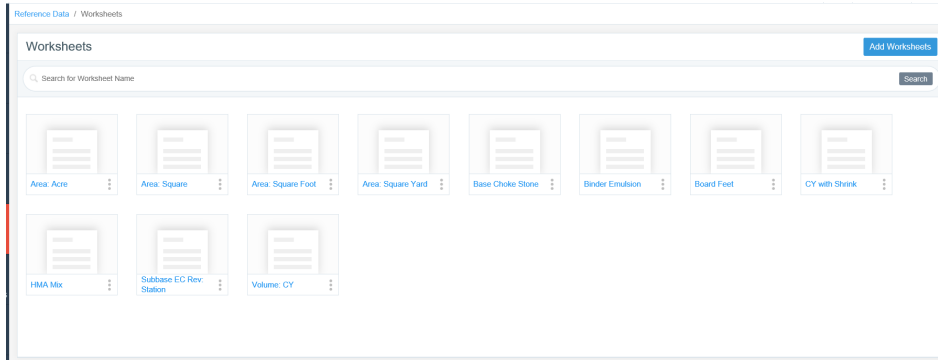


Figure 5-10. Reference Data Worksheets

5.8.1 Add Worksheets

You must select the worksheets to use and assign associated items in order to use worksheet calculations for item postings.

Worksheets already added to your options don't appear in the Add Worksheets list.

1. Click ADD WORKSHEETS. The Appia service opens the Add Worksheets window with the list of worksheets that have not yet been added to your reference data.
2. Select the worksheets that you will be using.
3. Click ADD.

The Appia service adds the selected worksheets to your reference data. Once a worksheet has been added to your reference data, you can associate it with items.

5.8.2 Worksheet Details

The worksheet details show the formula and fields used to calculate the quantity placed and any items associated in the reference data. Click any of the available worksheets names to see the worksheet details.

1. Click ASSOCIATE ITEMS to associate an item with this worksheet for this project (see Section 5.8.4).
2. Click the Item ID to see the item's details.

5.8.3 Delete Worksheet

If you delete a worksheet from your Worksheets page, you also delete any associated items. Deleting a worksheet does not affect worksheets in an under construction project.

You can add back any deleted worksheets, but you will have to associate the items again.

1. Click the three dots on the worksheet you want to delete.
2. Select **Delete**.
3. Click YES in the delete confirmation window.

5.8.4 Associate a Worksheet to an Item

Changing a worksheet in the reference data does not change the calculations using that worksheet already in a project. If the worksheet is associated with an item, you will see the association in the item details.

An item can be associated with only one worksheet. An item won't show up in the Associate Item list if it already has a worksheet association.

1. Once your worksheet is added from the reference data, click the three dots on the worksheet or select the worksheet name. Select **Associate Items**.
2. Enter the search criteria for the item to associate, such as the units or the item number, in the Search field and click SEARCH.
3. Select the items to associate with the worksheet and click SAVE.

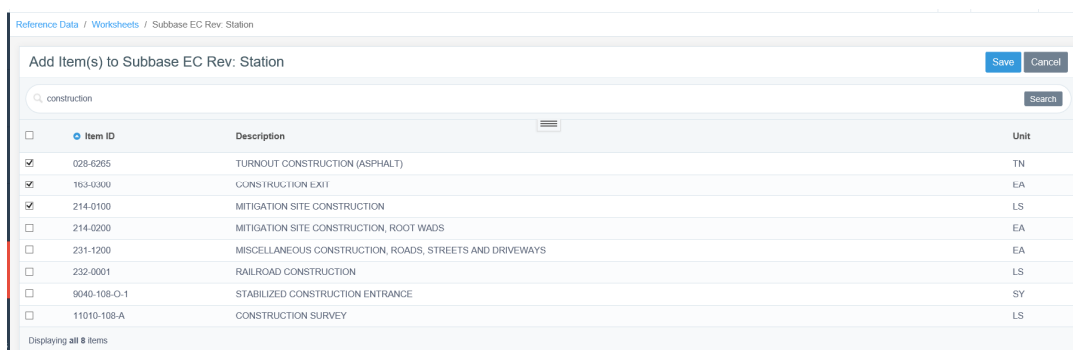


Figure 5-11. Worksheet Description Search

The Appia service associates the items with the worksheet and returns you to the Worksheets page.

5.8.5 Remove an Item Worksheet Association

Removing an item from a worksheet association does not change the calculations using that worksheet already in a project.

1. Select **Reference Data** and then **Worksheets** in the Sidebar menu.
2. Select the worksheet. The Appia service displays the worksheet details and its associated items.

3. Select the check mark for the items you want to disassociate with the worksheet. Click SELECT ALL to remove all items.
4. Click DISASSOCIATE ITEMS.
5. Click OK in the remove confirmation window.

The Appia service removes the item from the worksheet and returns you to the Worksheets page.

5.9 Contractors

The Contractors page lists all the contractors entered into the Appia service. From this page, you can add, delete, or change contractor information, search for a specific contractor (see Section 5.4), and import or export a contractors list (see Sections 5.1 and 5.3). Click any of the column headings to sort by that heading.

Organization	Contractor ID	
ABIE & SYVOBODA, INC.	VF411224817501	⊘
ANDERSON COLUMBIA CO., INC.	VF502871935002	⊘
APAC-SOUTHEAST, INC.	VF581401465001	⊘
ARAZOZA BROTHERS CORPORATION	VF65003132001	⊘
ARCHER WESTERN CONTRACTORS, LTD.	VF363286318005	⊘
ARCO, INC.	VF59396090001	⊘
CARLO, JOHN, INC.	VF381650909002	⊘
CEM ENTERPRISES, INC. DIVIA-SUNSHIN E PAINTING	VF591936740001	⊘
CHERRY HILL CONSTRUCTION, INC.	VF52089004001	⊘
COMMUNITY ASPHALT CORP.	VF502023299001	⊘
CONNOR, J.W. & SONS, INC.	VF59054802001	⊘
COXWELL, J.B. CONTRACTING, INC.	VF593668875001	⊘
D.A.B. CONSTRUCTORS, INC.	VF65026542001	⊘
DICKERSON FLORIDA, INC.	VF61127509001	⊘
DOUGLAS ASPHALT COMPANY	VF581153967001	⊘
FLORIDA INDUSTRIAL ELECTRIC, INC.	VF593568913001	⊘
GAINESVILLE LANDSCAPE CONTRACTORS, INC.	VF59126389005	⊘
GIBBS & REGISTER, INC.	VF59302002002	⊘

Figure 5-12. Contractors Page

Use the numbers on the bottom of the Contractors list to see additional contractor pages.

5.9.1 Add or Edit Contractor

Changing a contractor in the reference data does not change the contractor already in use in a project.

Any field marked with an asterisk is required.

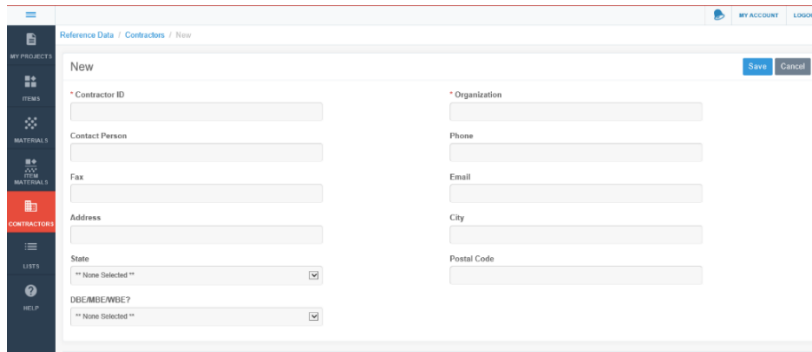


Figure 5-13. Add New Contractor

1. Select **Reference Data** and then **Contractors** in the Sidebar menu.
2. Click **ADD** or click the organization name to edit a contractor.
3. Enter or update the contractor information in the appropriate fields. Only the Contractor ID and Organization are required.
4. Click **SAVE**.
5. If you are adding a contractor, the Appia service adds the reference contractor to the contractor list and displays a successfully saved message. Click Add Another? to add another contractor, or click Contractors in the navigation trail to return to the Contractors page.
6. If you are editing a contractor, click Contractors in the navigation trail to return to the Contractors page.

5.9.2 Delete Contractors

You cannot delete any contractor that has been assigned to a bid or added to a project.

1. Select **Reference Data** and then **Contractors** in the Sidebar menu.
2. Click the X next to the contractor you would like to delete.
3. Click **OK** in the delete confirmation window.

5.10 Lists

There are several reference data lists that are part of the Appia service. You must enter values for these lists before they can be used. These lists allow you to customize several areas in the Appia service, including the various drop-down lists and daily reports.

Reference Data / Lists	
Lists	
Attachment Groups	Import Edit
Change Order Custom Fields	Import Edit
Change Order Type	Import Edit
Corridors	Import Edit
Countries	Import Edit
Orange	X
Passaic	X
Rockland	X
Sussex	X
Daily Report Custom Fields	Import Edit
Diary Custom Fields	Import Edit
Districts	Import Edit
Divisions	Import Edit
Equipment	Import Edit
Fund Types	Import Edit
Material Forms	Import Edit
Material Manufacturer	Import Edit
Material Suppliers	Import Edit
Municipalities	Import Edit

Figure 5-14. Lists Page

Only the system administrator and senior project manager can add, change, or delete list values. The lists themselves cannot be deleted.

Some lists add fields in their respective areas when they are populated on the Reference List page. If the list has no value, you may not see the corresponding field in the Appia service.

5.10.1 Add or Edit List Values

Values added to the reference list data display in the drop-down list of a field. Changing a value in the reference data does not change the value already in use in a project.

Figure 5-15. Add or Edit Reference List Value

1. Select **Reference Data** and then **Lists** in the Sidebar menu.
2. Click **EDIT** for the list. The Appia service displays any values already in the list.
3. Change any value in the list or click **ADD VALUE** and enter the value in the field.

4. Click **ADD VALUE** to add additional values.
5. When you are finished, click **SAVE**.

The Appia service adds or edits the values to the list and displays a successfully saved message.

5.10.2 Delete List Values

You can delete values that have already been selected for a project without affecting the project. The lists themselves cannot be deleted.

1. Select **Reference Data** and then **Lists** in the Sidebar menu.
2. Click the down arrow next to the list name that contains the value you want to delete. The list displays all its values.
3. Click the **X** next to the selected value.
4. Click **OK** in the delete confirmation window.

6. Export Data

You can export your Appia database into raw data files so it can be stored in a project archive. This includes reports, reference data, settings, and other information about your business. You must be on the My Project page to see the Export Data option.

Please see the *Appia User's Guide* for information on exporting project or report information into .zip files.

6.1 Export Database

You can export the database for any business to which you have the proper access.

1. Select **Export Data** in the Sidebar menu and select **Export Database**.
2. Click EXPORT DATABASE.

The Appia service creates a .zip file of the database. You will receive an email with a link to the file when it is ready.

7. Archived Project

An archived project no longer displays on the My Project page, but can be restored at any time. Projects can be archived at any phase in the Appia service. Archived projects do not display in any project searches or views. Only users with a role of project manager or above can view, archive, and restore projects.

Click the ARCHIVED button from the My Projects page to see the list of archived projects. The archived project displays the project ID and description, the phase it was in when it was archived, and the archived date.

7.1 Archive a Project

You can archive a project when you no longer want it displayed on the My Projects page but you either can't or don't want it deleted.

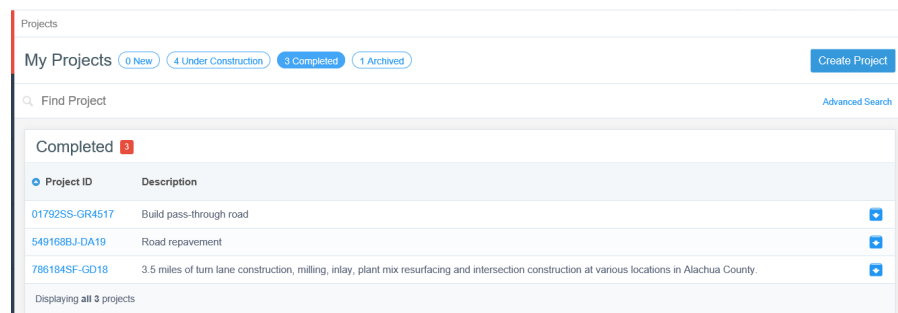


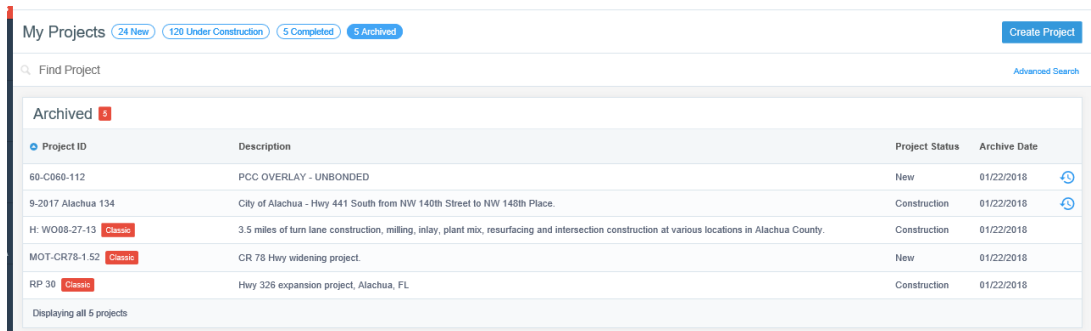
Figure 7-1. Completed Projects With Archive Icons

1. From the My Projects page, select the current phase of the project.
2. Select the box ARCHIVE icon for the project.
3. Click OK in the archive confirmation message.

The Appia service moves the project to the Archive phase and returns you to the My Projects page. Only users with a role of project manager or above can view or restore the archived project.

7.2 Restore a Project

You can restore a project to the phase it was in when it was archived. If the project was archived in the Classic Appia service, you may have to revoke access and log into the Classic Appia service to restore it.



The screenshot shows the 'My Projects' interface. At the top, there are filters for '24 New', '120 Under Construction', '5 Completed', and '5 Archived'. A search bar is present with the text 'Find Project' and an 'Advanced Search' link. Below the filters, the 'Archived' section is active, showing a table of projects. The table has columns for 'Project ID', 'Description', 'Project Status', and 'Archive Date'. Each row includes a blue circular restore icon in the rightmost column. The projects listed are:

Project ID	Description	Project Status	Archive Date
60-C060-112	PCC OVERLAY - UNBONDED	New	01/22/2018
9-2017 Alachua 134	City of Alachua - Hwy 441 South from NW 140th Street to NW 148th Place	Construction	01/22/2018
H: W008-27-13	3.5 miles of turn lane construction, milling, inlay, plant mix, resurfacing and intersection construction at various locations in Alachua County.	Construction	01/22/2018
MOT-CR78-1.52	CR 78 Hwy widening project.	New	01/22/2018
RP 30	Hwy 326 expansion project, Alachua, FL	Construction	01/22/2018

At the bottom of the table, it says 'Displaying all 5 projects'.

Figure 7-2. Archived Projects With Restore Icons

1. Select the Archived phase from the My Projects page.
2. Click the clock RESTORE icon for the project.

The Appia service restores the project to its previous phase and returns you to the My Projects page. It can be viewed by all users that have access to it.