

## CASE STUDY

# Texas CEI Firm Streamlines Fund-Tracking and DOT Reporting through Appia<sup>®</sup>

### CHALLENGE

An engineer consulting firm has various reporting requirements depending on whether they are working on a local or a DOT-funded project. Meeting those requirements with paper and spreadsheets was doable but headache-inducing.

### SOLUTION



Appia<sup>®</sup> for construction administration and inspection.

### RESULTS

The featured engineering firm uses Appia to maintain project records, track fund packages, and provide transparent reports to project stakeholders.

ANNUAL USE

**\$20M**

Annual Project Value

**3-5**

Team Size

Roadway  
construction  
and rehab

Project Types

**3-4**

Annual Projects

**NOTE:** Identifying information has been removed from this case study. Quotes and use cases are from real users but kept anonymous at request.

## Finding a System for Federal and Local Compliance

The Senior Project Manager at the featured CEI firm in Texas heads up a team of five inspectors responsible for overseeing ~\$20 million annually in roadway construction and rehabilitation projects. Several of these projects are funded by the state DOT, but

not managed directly through their digital system.

On these projects, the PM's team used a mix of paper reports and Excel spreadsheets that had to be manually maintained and physically transferred from the site to the

field. To gain efficiency, the PM began looking for a system that he could use on local projects that was comprehensive enough to meet DOT reporting requirements.

"We needed a system that was robust enough to be able to provide the documentation to meet federal requirements."

In 2013, the PM and his team began using Appia on a passthrough toll program in a nearby city. Part of their motivation was to find a system that would simplify the stressful federal audit process.

**"We got through [the audits], but I didn't have a system that was user-friendly where I could interface from the field to the office without having a physical transferred document that someone had to take somewhere."**

## Reporting to the DOT with Appia

The PM and his inspection team gather reports, track items, generate estimates and pay orders, and maintain project documentation all within Appia. Keeping this documentation in one system makes it easier to report to the DOT when the time comes.

are all reviewed by the city. These reports are stored in a project folder that DOT can easily access when auditing the project. The accuracy and timeliness of these reports are crucial to funding reimbursements for the city.

Using Appia's instant report generation features, the PM produces a summary report, a detailed report, and an invoice that

**"Every month, I'd send the city the pay estimate package and the contractor's invoice to make sure all their items match what's**

**in Appia. They were good with the package and never had any issues with reimbursements."**



**"Appia maintains all the project items, inspection reports, and change orders all in one place to help the [reporting] process be more convenient."**

# Appia Benefits Breakdown



## Increased Transparency Through Read-Only Access

“At any time, I can give anyone access to Appia, and they can see exactly what’s going on in the project. They can dig down as deep as they want into change orders, times, bid items, material stockpiles, etc. It shows we’re not trying to hide anything and gives an overall picture of what’s going on.”

Using Appia’s free “read-only” licenses, the PM can provide open access to projects for all necessary stakeholders. The search function in Appia means he can answer questions quickly, but sometimes it’s best to open the doors to owners, auditors, contractors, and anyone else with a stake in the project.



## Digital Efficiency Through Fund Tracking

“If you have to track two or three different packages of funding, it’s helpful to be able to track that in Appia and then generate a report at any time during the project on where those packages are at, what percent complete, and what percentage of federal highways funding is completed compared to the city’s bucket of funds.”

The PM’s team is often managing projects with a mix of participating and non-participating items, the latter being unsupported by federal funding. Tracking mixed funding manually through spreadsheets can be a huge pain point, as managers try to keep track of which funds are paying for which items. In Appia, this happens automatically.



## Expedited Closeout and Claim Resolution

“We had a project go to claim on a time issue. We had to see how much time impacted the contractor due to weather. With the search function in Appia, I can go in and say ‘weather days’ and quickly pull it up. That helped on the claim process.”

With all project documentation stored in an easily-accessible cloud database, closeout and compliance are much more straightforward for the PM and his team. He can give auditors read-only access to weeks of inspection reports, status reports, change orders, and any other documentation they require. Having this information at his fingertips also makes it easy for the team when the rare claim arises.

## Implementing and Training with Appia

The PM and his team came to Appia with some familiarity with its functionality, thanks to their experience with SiteManager™, the construction management system that the state DOT uses on their projects. The PM notes that Appia is a user-friendly system that doesn't require much training to get up and running.

“It doesn't take very long; we're hands-on, we give them access and show them how the system works. It doesn't take too long to train anyone up on it.”

## Overcome the Challenges of Construction Administration and Inspection

Streamline your processes with a web-based, mobile-accessible service built on intuitive use and flexibility.

- + Track fund packages with participating and non-participating items
- + Increase transparency with read-only access for project stakeholders
- + Breeze through audits with search and reporting features
- + Reduce travel and increase inspector autonomy
- + Handle claims efficiently with project data at-hand

Visit [infotechinc.com/appia](http://infotechinc.com/appia) to learn more.

