



State of Rhode Island Department of Transportation

Quest Lite Users Manual

DRAFT Version 02.08.08

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1. Overview

This chapter provides the information for understanding and using the Quest Lite User Manual, the technical support information for the Quest Lite Software Application, and the Installation and Un-Installation Instructions for Quest Lite.

- 1.1 General Statements
- 1.2 Quest Lite Purpose
- 1.3 Technical Support
- 1.4 Conventions
- 1.5 Hardware Requirements
- 1.6 Quest Lite Installation Instructions
- 1.7 Quest Lite Un-Installation Instructions
 - 1.7.1 Windows 98
 - 1.7.2 Windows NT
 - 1.7.3 Windows 2000
 - 1.7.4 Windows XP

1.1 General Statements

This User Manual provides instruction on step-by-step instructions for the Quest Lite Software application. It does not cover bidding requirements and conditions for Rhode Island Department of Transportation

This User Manual assumes the user has a basic understanding of Microsoft Window operations and general terminology.

1.2 Quest Lite Purpose

Quest Lite is a software package used by the contractor for the preparation of a bid proposal for submission to RIDOT. The purpose of Quest Lite is to standardize bid proposals and assist in the elimination of errors in the bid preparation process..

Quest Lite eliminates the exhaustive process of typing or writing bids by hand. This will also eliminate the possibility of human error in calculating the total amount for an item, writing a bid price and calculating the final bid total. The minimum acceptable bids and only acceptable bids for specific items are enforced to prevent the contractor from entering an unacceptable bid price.

1.3 Technical Support

Any questions regarding technical support for Quest Lite Software can be referred to:

Office of the Chief Engineer Project Tracking Unit
@ (401)-222-2492 or by e-mail at PTS@dot.state.ri.us.
Office Hours: 8:30 AM – 4:00 PM

1.4 Conventions

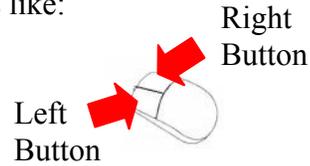
Before beginning use of the Quest Lite User Manual, it is important to understand the documentation conventions.

When you see this...

This is...

Mouse

Actual mouse looks like:



On screen the mouse looks like:



Main Screen

Toolbar

Legend

Text Field

Tree view

Contract Information

Contract Number: 2002-CB-012 Addendum: 1

Contract Name: RECONSTRUCTION OF INTERCHANGE

Description: THIS PROJECT IS FOR THE RECONSTRUCTION OF MESHANTICUT INTERCHANGE, ADVANCE CONTRACT NO. 2, LOCATED IN THE CITY OF CRANSTON, RHODE ISLAND SHALL INCLUDE BUT IS NOT

Limits: NEW LONDON AVENUE, FROM ROUTE 2 TO WARFIELD AVENUE.

Undersigned Information: THE UNDERSIGNED BIDDER FURTHER AGREES, IF AWARDED THE CONTRACT ON THIS PROPOSAL TO BEGIN WORK WITHIN TEN (10) CALENDER DAYS AFTER THE EXECUTION OF THE CONTRACT

Bid Place: Transportation Management Center Bid Place Time: 11:30 AM

Bid Deadline Time: 11:30 AM City/Town: CRANSTON (PROVIDENCE)

Proposal Read Time: 11:30 AM

Plans Charge: \$175.00

DBE Percentage: 10.00%

Contract Dates		
Bid Deadline	8/7/2002	<input type="checkbox"/>
Bid Examine	7/10/2002	<input type="checkbox"/>
Bid-Opening	8/7/2002	<input type="checkbox"/>
Final Completion	6/25/2004	<input checked="" type="checkbox"/>

= appears on Proposal Pages

When you see this...

Do this...

Left-click with the mouse

Click the left button on your mouse.



Double-left-click with the mouse

Click the left button on the mouse twice.



Right-click with the mouse

Click the right button on your mouse.



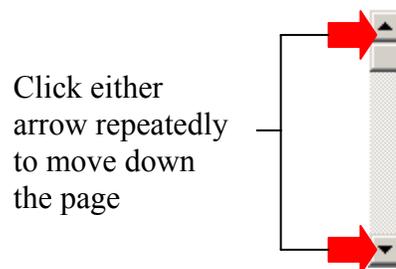
Press Enter on the keyboard

Press the Enter key on you computer's keyboard.



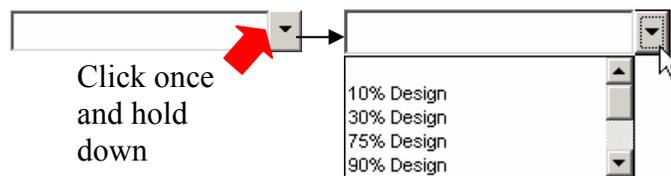
Use the scroll bar

Click on either the top or bottom arrow of the scroll bar. In certain instances (I.E. Bidder Certifications), the scroll must be moved to the Bottom Arrow in order to select the options provided.



Use the drop-down menu

Click and hold the left button down on the downward arrow to the right of the text field to display the offered information. Without releasing your finger select the correct information.



Bidder certification
Agreement options

Click on the blank circle next to your decision.
Either: Yes/No *or* I Agree/I Do Not Agree



Use the number pad

Use either number pad on your computer's
keyboard to type in a price.



1.5 Hardware Requirements

These minimum hardware requirements are set by RIDOT to execute Quest Lite on user's machine:

1. Pentium PC 400 running Windows 98 SE/NT 4.0 SP6/WIN 2000 SP2/Windows XP
2. Access to a CD-ROM Drive
3. Access to a Floppy Drive
4. 128 MB of memory
5. 50 MB of Free Hard Disk space for the installation
6. Printer connected to computer
7. Mouse
8. Keyboard
9. 15" or larger color VGA monitor

Quest Lite can only be used as a standalone application. Technical support will not be provided if Quest Lite is set up as a network application.

Quest Lite is not designed to work with Apple computers.

Technical support will also not be provided if the user's machine does not meet the above minimum hardware requirements.

1.6 Quest Lite Installation

1. If Quest Lite currently exists on the machine and it is an older version, please follow the uninstall instructions first.
2. To install Quest Lite it is important that the user is logged in as the System Administrator with full rights.
3. **Windows NT** users must make sure the following items are installed on their computer:
 - a. At least Internet Explorer 5.0 with at least Service Pack 2 Service Pack 6 for NT
4. **Windows 98** users must make sure the following item is installed on their computer:
 - a. At least Internet Explorer 5.0 with at least Service Pack 2
5. Double left-click with the mouse on the Quest Lite.exe icon located on the CD.



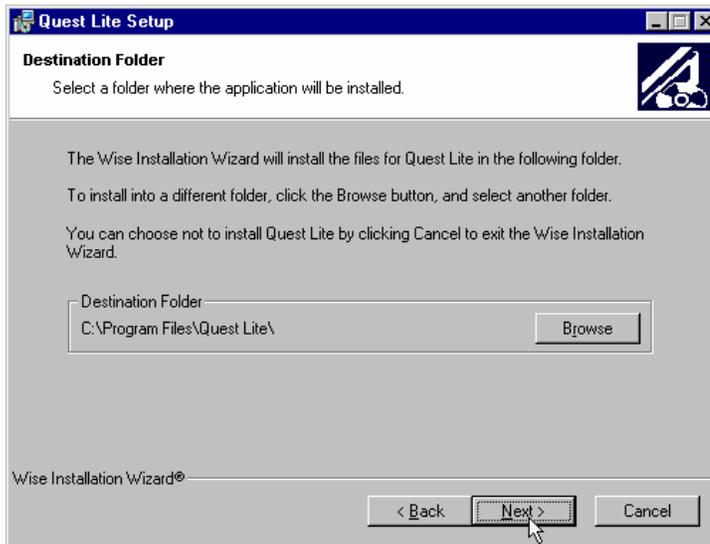
6. The **Enter Password** window will appear. Use the keyboard to type in **RIDOT** as the password and using the mouse left-click once on the  button.



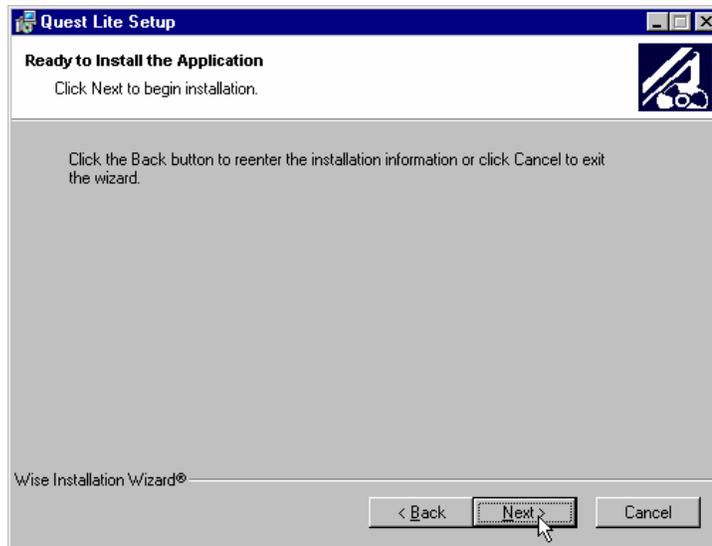
- The **Quest Lite Setup** Welcome Screen appears.
- Left-click with the mouse on the  button.



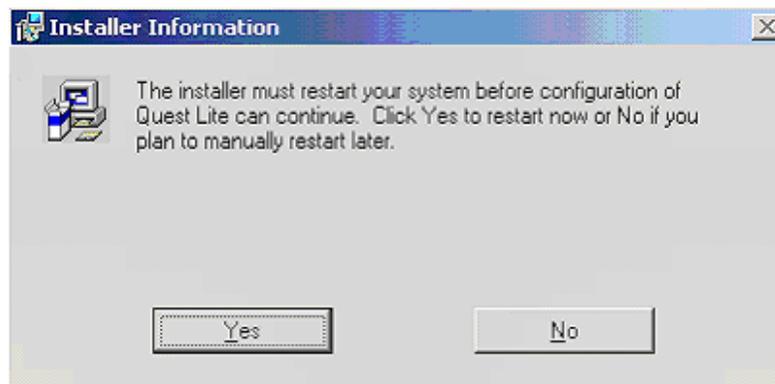
- The **Quest Lite Setup** Destination Folder window will appear. A default location for the destination folder will be suggested for installing Quest Lite into.
- Left-click with the mouse on the  button if you would like to install Quest Lite into a different location.



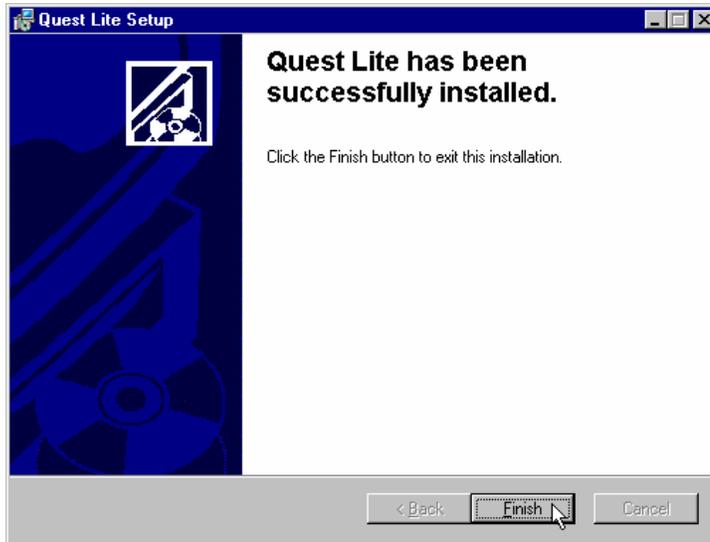
11. Left-click with the mouse on the button. A screen will appear to ensure the user that they are ready to install Quest Lite.



12. Left-click with the mouse on the button. Installation will begin.
13. If at any time during the installation the below message appears, left-click with the mouse on the button. The computer will restart and complete the Quest Lite Installation.

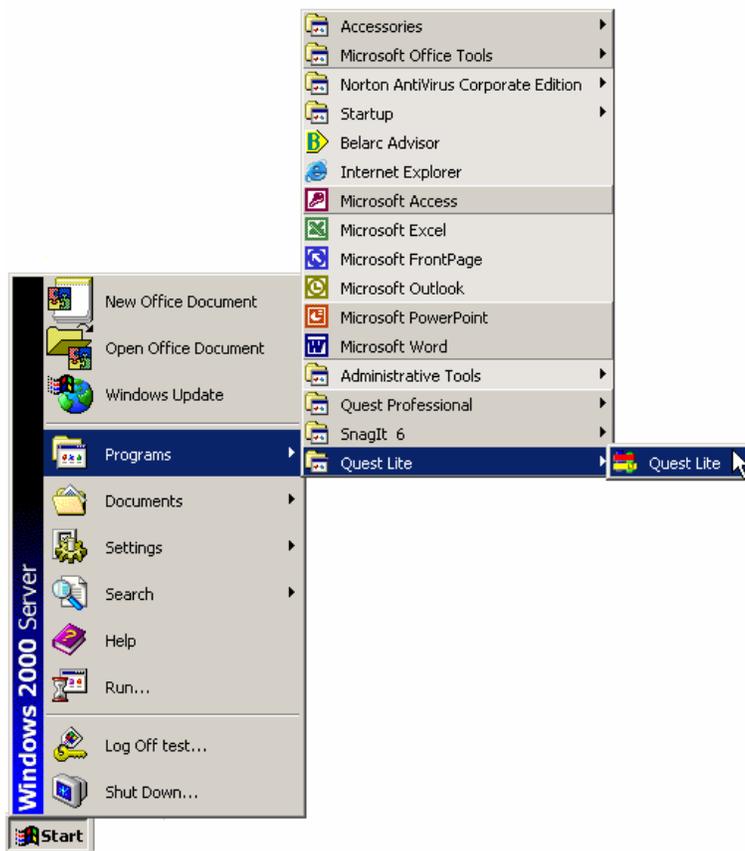


14. When the installation has completed, a screen will appear stating Quest Lite has been successfully installed. Left-click with the mouse on the  button.



15. There may be a prompt to restart the computer. Left-click with the mouse on the Restart button for this and let the computer restart.

16. To view Quest Lite, left-click with the mouse on the Start Button, then Programs, and then Quest Lite.



17. A box will appear requesting the Site Code, Bidder Code, and Company Short Name. This information will be given upon registration in person at the office of Rhode Island Department of Transportation Contracts Administration. It is important to note that you MUST register in person at the Contracts Administration Section.

A screenshot of a dialog box titled 'Setup Defaults'. The dialog box has a title bar with the Windows logo, the text 'Setup Defaults', and standard window controls (minimize, maximize, close). The main area of the dialog box is titled 'Enter Site Information' and contains three input fields: 'Site Code:' with four separate text boxes, 'Bidder Code:' with one text box, and 'Company Short Name:' with one text box. At the bottom of the dialog box, there are two buttons: 'OK' and 'Close'.

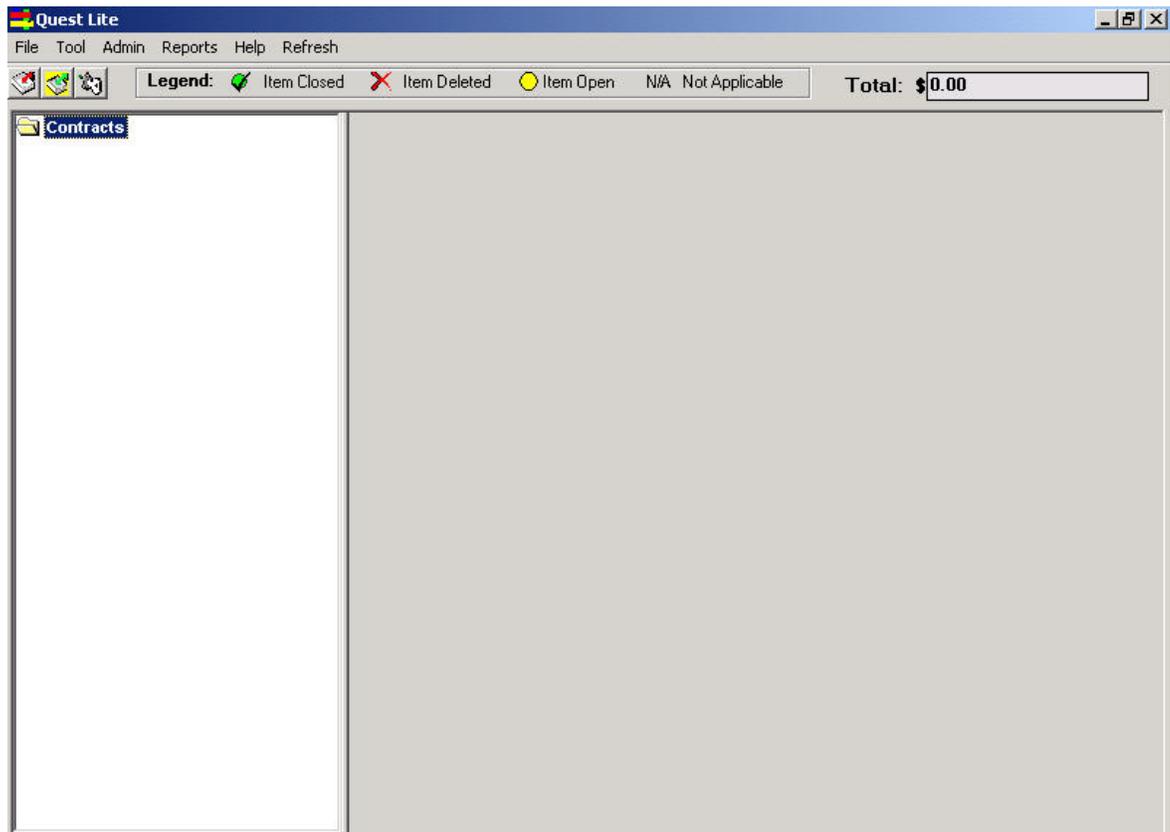
18. Once the Site Code, Bidder Code, and Short Name have been entered, left-click with the mouse on the  button.
19. Use the keyboard to type-in **admin** for the user name and **admin** for the password.



20. Leave the checkmark in the box next to Remember Password if the user name and password should be remembered for each login.

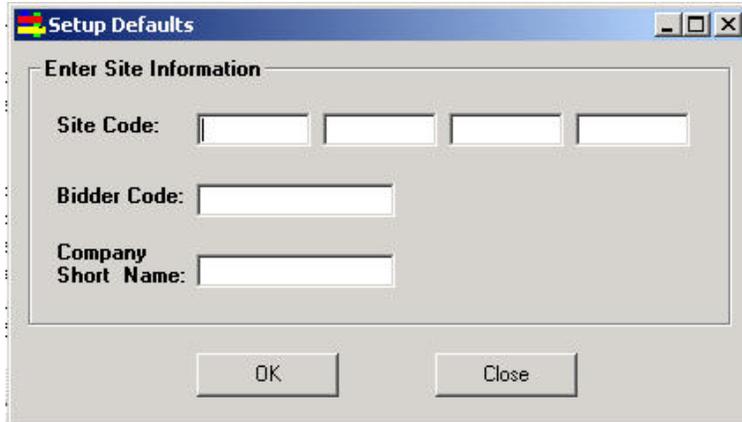
NOTE: It is highly suggested to follow the instructions in Chapter 2. Setup, Section 2.2 Users located on Page 30 for adding, deleting, and modifying users.

21. Left-click with the mouse on the  button. The Quest Lite main screen will now appear.



22. The System Administrator should ensure all possible users for the machine are added as users to the machine.

23. The System Administrator should close out of Quest Lite and log off the machine. When the regular user logs into the machine as them, a box will appear requesting the Site Code, Bidder Code, and Company Short Name. This information will be given upon registration with Contracts Administration.



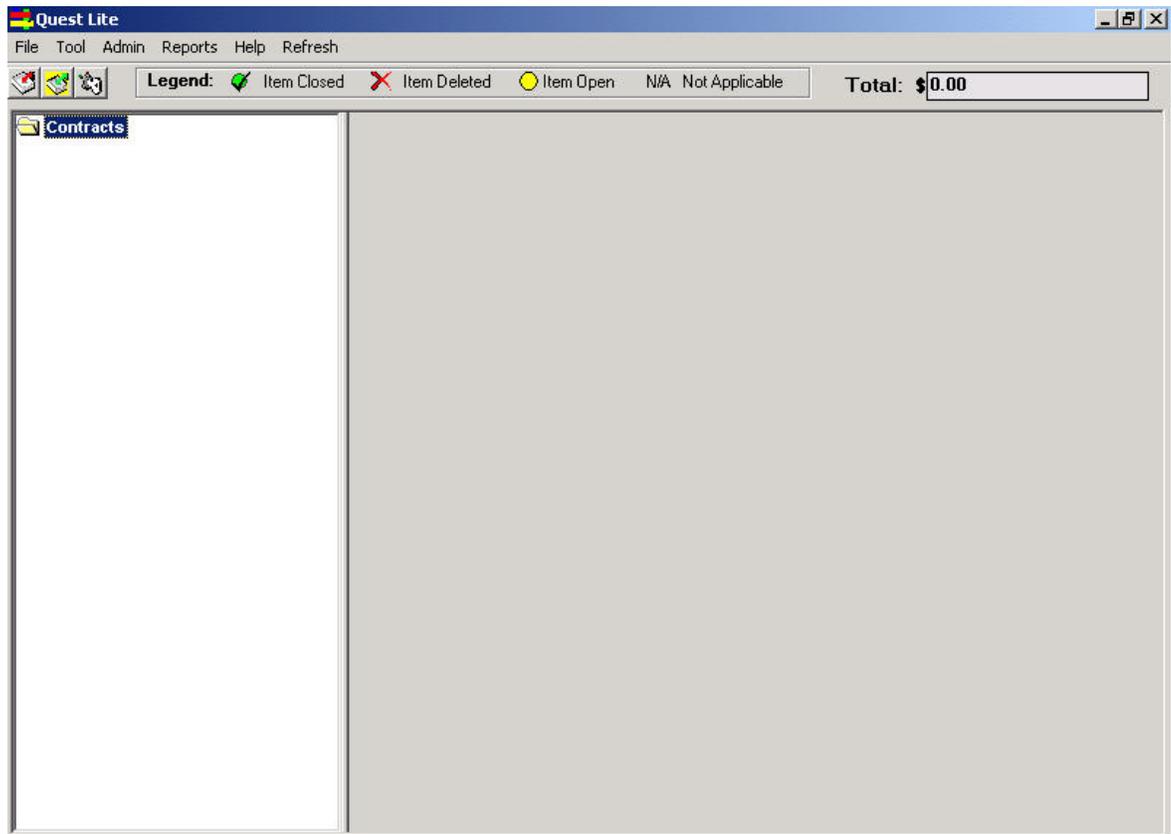
24. Once the Site Code, Bidder Code, and Short Name have been entered, left-click with the mouse on the  button.
25. Use the keyboard to type-in **admin** for the user name and **admin** for the password.



26. Leave the checkmark in the box next to Remember Password if the user name and password should be remembered for each login.

NOTE: It is highly suggested to follow the instructions in Chapter 2. Setup, Section 2.2 Users located on Page 30 for adding, deleting, and modifying users.

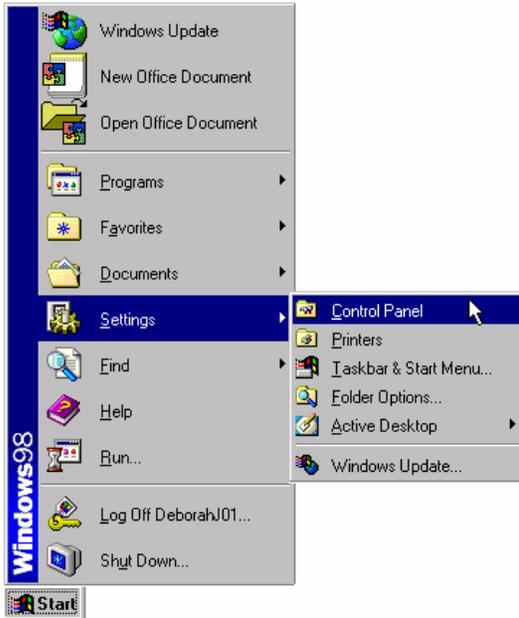
27. Left-click with the mouse on the  button. The Quest Lite main screen will now appear.



1.7 Uninstalling Quest Lite

1.7.1 Windows 98 Operating System

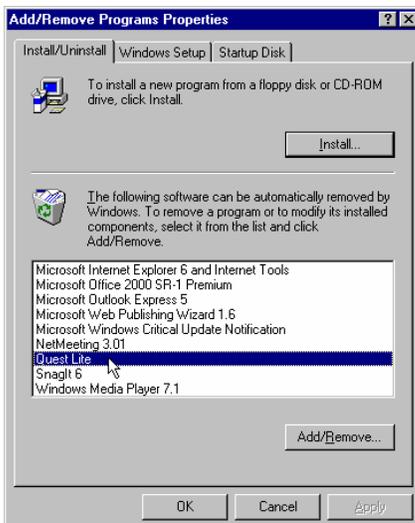
1. Left-click with the mouse on the Start button, then Settings and then Control Panel.



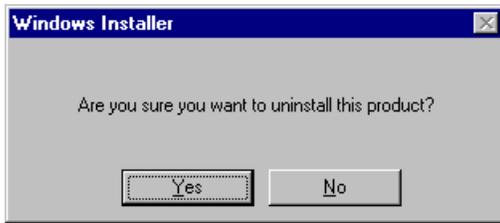
2. Double-left-click with the mouse on the Add/Remove Programs icon.



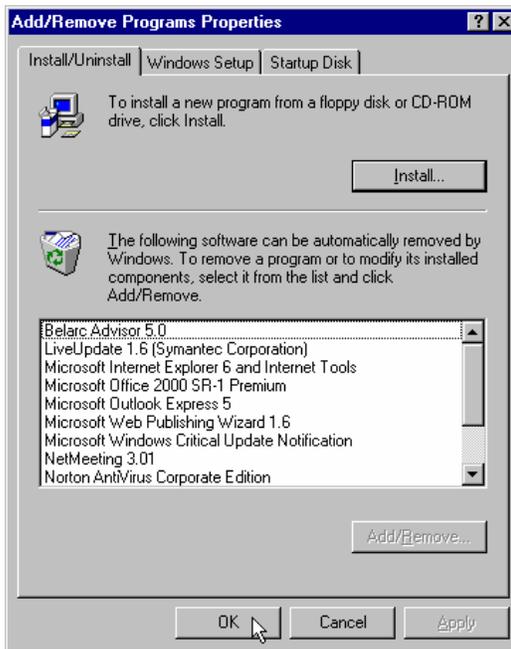
3. Left-click with the mouse on Quest Lite in the list of programs.



- Left-click with the mouse the **Add/Remove...** button. The **Windows Installer** window appears.

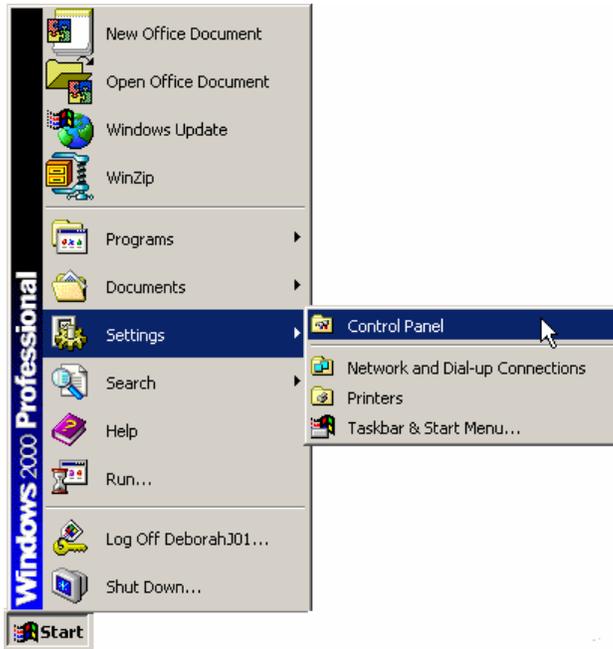


- Left-click with the mouse on the **Yes** button. The uninstall process will initiate.
- Once the process has completed, in the **Add/Remove Program Properties** window, left-click with the mouse on the **OK** button. Quest Lite has now been removed from the computer.



1.7.2 Windows 2000 Professional Operating System

- Using the mouse, hold the left-click down on the Start button, then Settings and then Control Panel.

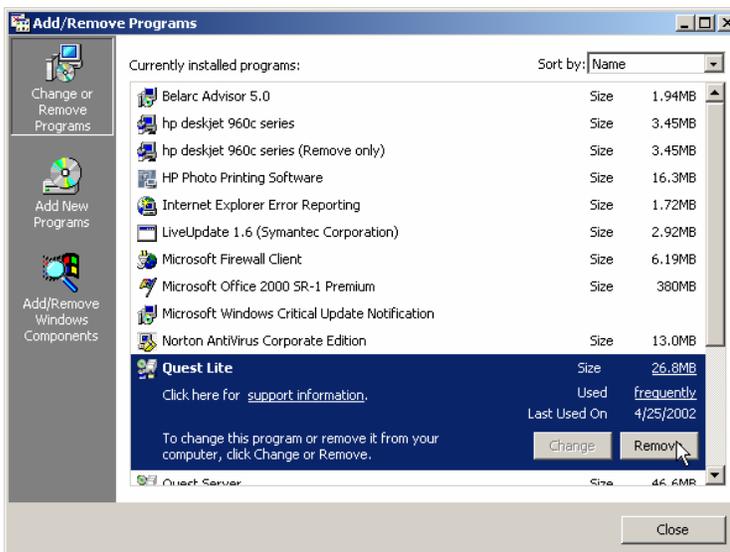


- Double-left-click with the mouse the Add/Remove Programs icon with the mouse



Add/Remove Programs

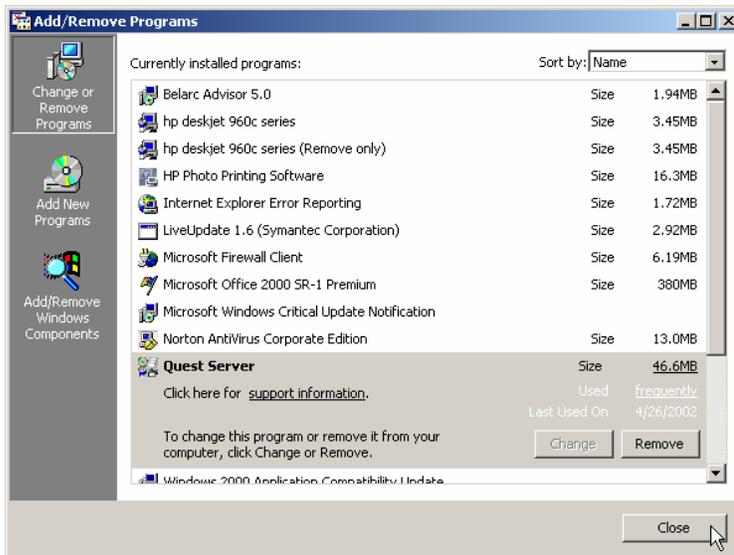
- Left-click with the mouse on Quest Lite from the list of programs to select it.



- Left-click with the mouse on the **Remove** button. The **Windows Installer** window appears.

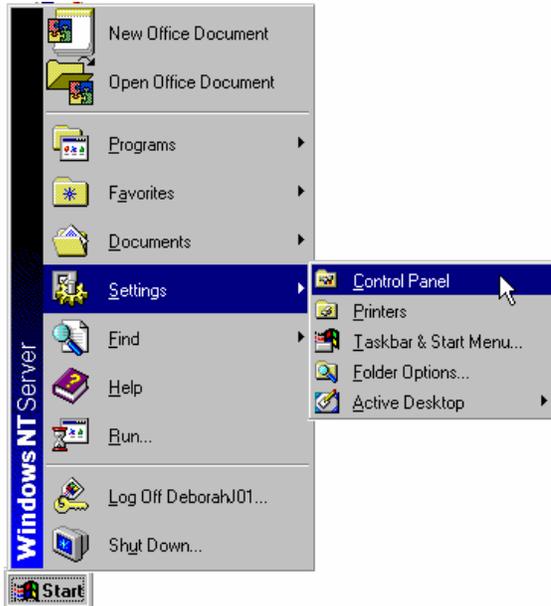


- Left-click with the mouse on the **Yes** button. The uninstall process will initiate.
- Once the process has completed, in the **Add/Remove Programs** window, left-click with the mouse on the **Close** button. Quest Lite has now been removed from the computer.



1.7.3 Windows NT Operating System

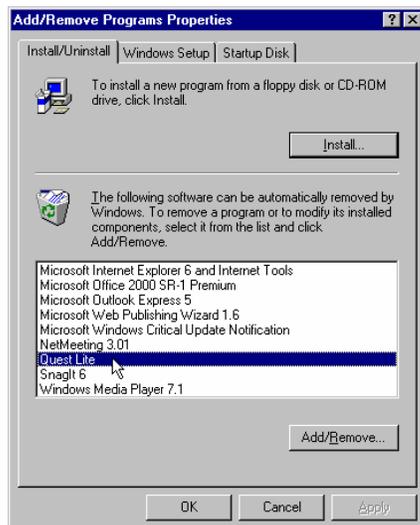
1. Using the mouse, hold the left-click down on the Start button, then Setting and then Control Panel.



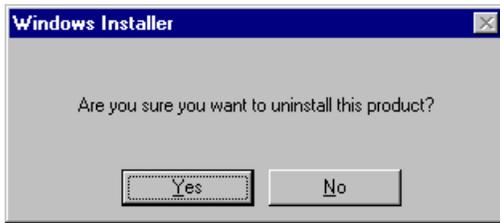
2. Double-left-click with the mouse on the Add/Remove Programs icon.



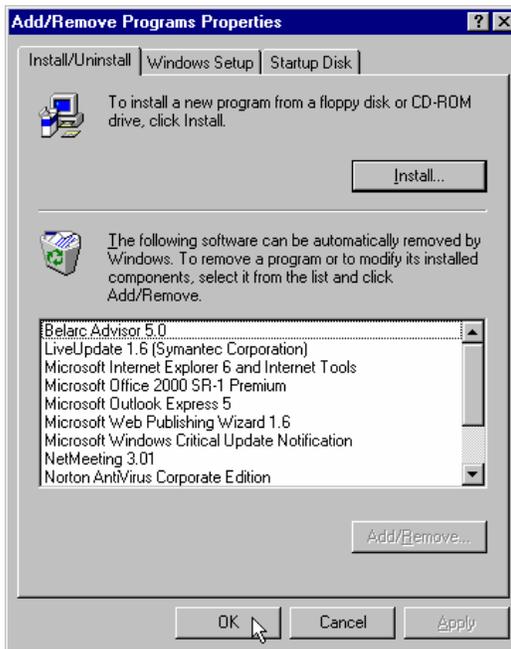
3. Left-click with the mouse on Quest Lite in the list of programs.



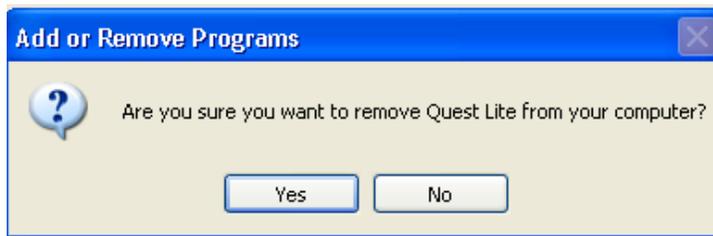
- Left-click with the mouse on the **Add/Remove...** button. The **Windows Installer** window appears.



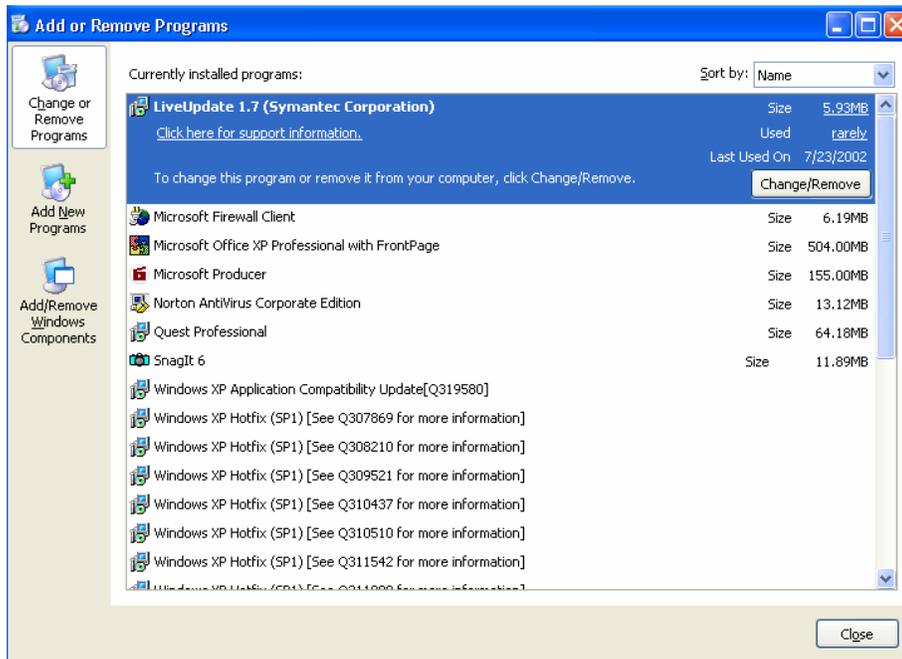
- Left-click with the mouse on the **Yes** button. The uninstall process will initiate.
- Once the process has completed, in the **Add/Remove Program Properties** window, left-click with the mouse on the **OK** button. Quest Lite has now been removed from the computer.



4. Left-click with the mouse on the **Remove** button. The **Windows Installer** window appears.



5. Left-click with the mouse on the **Yes** button. The uninstall process will initiate.
6. Once the process has completed, in the **Add/Remove Program Properties** window, Quest Lite will no longer display in the **Add/Remove Program** screen.



7. Left-Click with the mouse on the **Close** button.

2. Setup

This chapter provides the step-by-step instructions for the initial set up of Quest Lite following the installation.

2.1 Default Company Information

2.2 Users

2.2.1 Access User Screen

2.2.2 Add User

2.2.3 Edit Current User

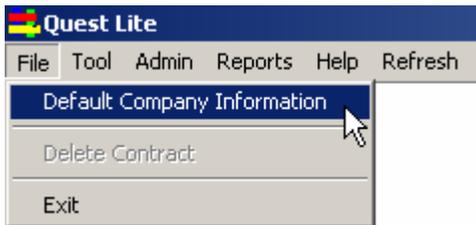
2.2.4 Delete User

2.3 Security

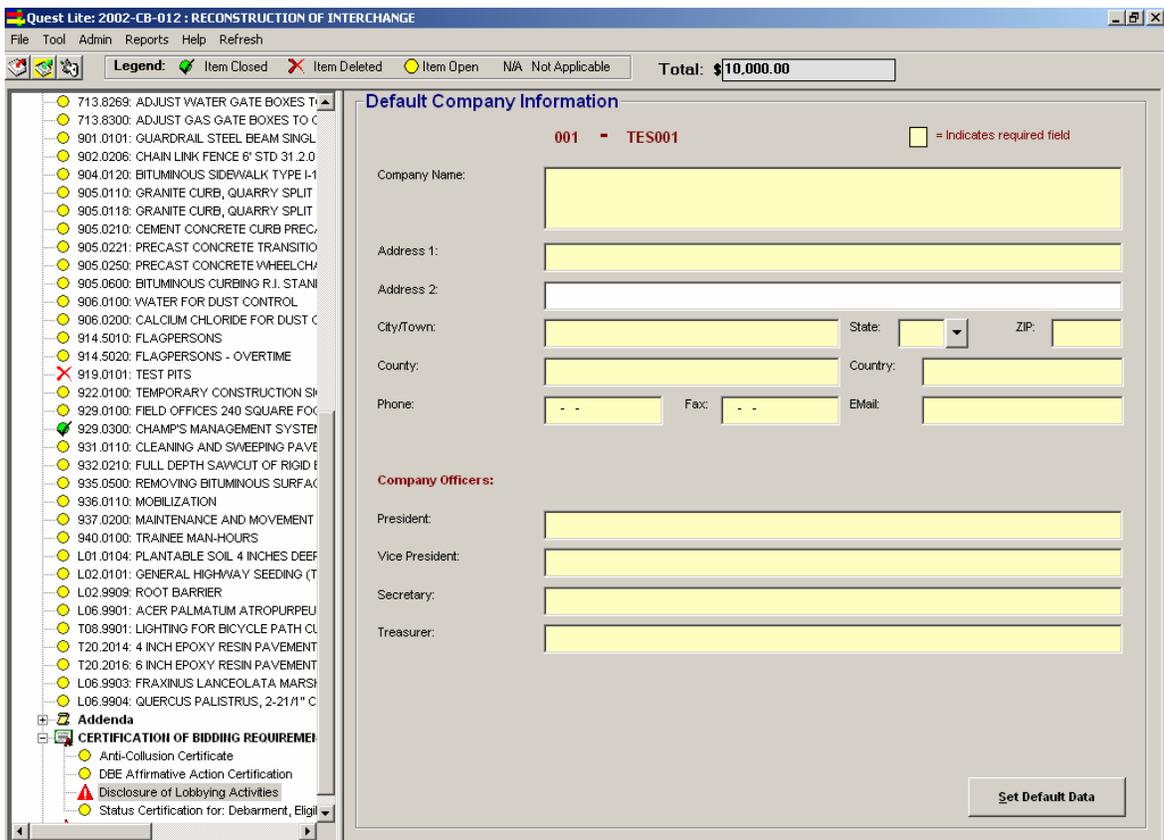
2.1 Default Company Information

This contains the company information used each time a bid file is submitted to RIDOT. This information can be modified at anytime. By entering the company information here, the information will not have to be entered for each bid submission. It is important to note this information will not automatically be applied to each contract. To apply this information to a contract, follow the steps provided in the Chapter “Steps to Bid Submission”; Section “Apply Bidder Information to Contract”.

1. In the toolbar, left-click with the mouse on File and then Default Company Information in the menu provided.



2. The **Default Company Information** screen appears. Enter the company’s information by left-clicking once in any text field with the mouse and typing the corresponding information with the keyboard. The fields on the screen that appear yellow shaded are required fields and must be completed.



3. When all information has been entered, left-click with the mouse on the



Set Default Data

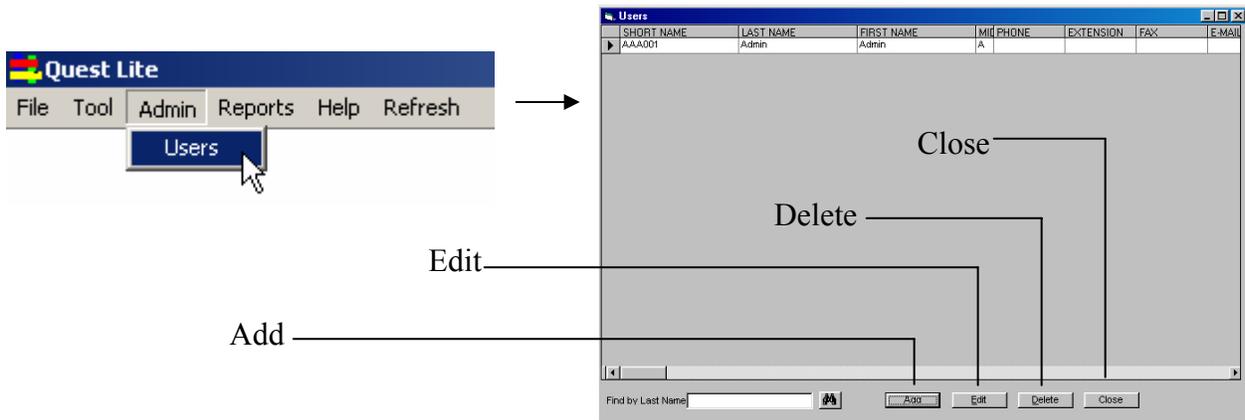
button, located in the bottom-right part of the screen.

2.2 Users

This allows the adding, editing, and deleting of users and their information, such as the login name and password for Quest Lite.

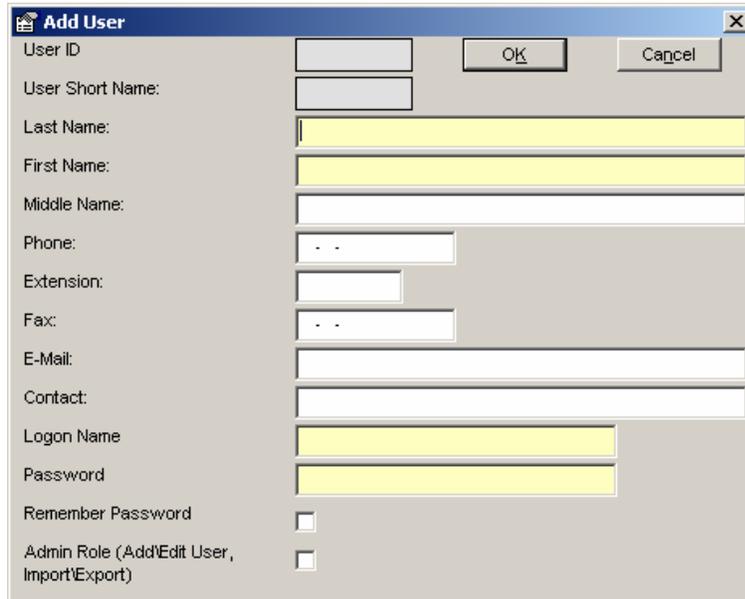
2.2.1 Access User Screen:

1. In the toolbar, left-click with the mouse on Admin and then Users from the menu provided. The **Users** table appears.



2.2.2 Add New User:

1. Left-click with the mouse on the  button, located at the bottom of the **Users** table. The **Add User** setup screen appears. To successfully add a user to Quest Lite, data must be entered for the required fields, which are shaded yellow.



2. Left-click with the mouse in each of the text fields and type in the information using the keyboard.
3. Type in any other information as desired with the keyboard.
4. If the user would like for the program to remember their login name and password when first executing Quest Lite, the Remember Password checkbox should be left-clicked on, with the mouse, placing a checkmark in the box to the right of the “Remember Password” label.
5. If the newly added user is allowed to access the Admin and Tool options on the Quest Lite menu, the Admin Role checkbox should be left-clicked on, with the mouse, placing a checkmark in the box to the right of the “Admin Role (Add/Edit User, Import/Export)” label.
6. When completed, left-click with the mouse on the  button in the top of the screen.

2.2.3 Edit Current User:

1. In the **Users** table, select the row of information to be modified by placing the mouse in the gray box to the left of the user's SHORT NAME and left-clicking once.

Left-click with mouse on the user's row

Edit Button

SHORT NAME	LAST NAME	FIRST NAME	MIDDLE NAME	EXTENSION	FAX	E-MAIL
A_A001	Admin		A			
D_0001	DIARNO	DAVID				
P_0001	STEFANK	PETER				
W_0001	CONFORTI	WAYNE				
S_A001	ABRAMOV	SEROI				

Find by Last Name:

2. Left-click with the mouse on the button, located at the bottom of the **Users** table. The **Edit User** setup screen appears.

Edit User

User ID:

User Short Name:

Last Name:

First Name:

Middle Name:

Phone:

Extension:

Fax:

E-Mail:

Contact:

Logon Name:

Password:

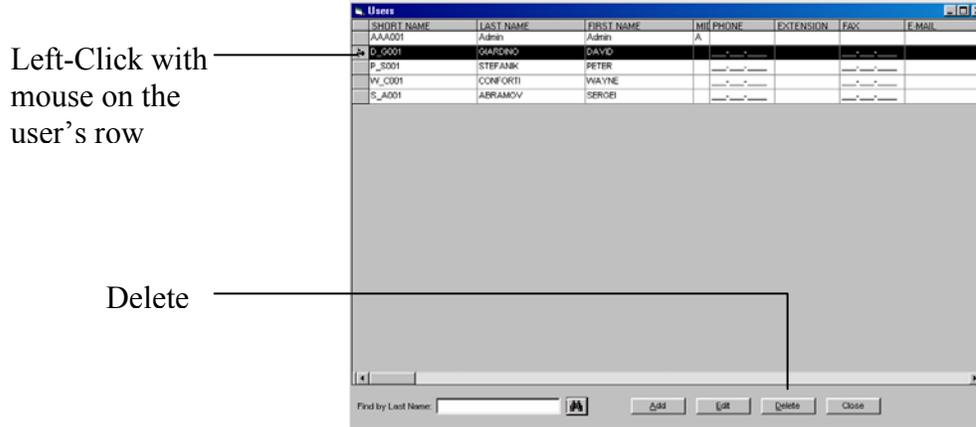
Remember Password:

Admin Role (Add/Edit User, Import/Export):

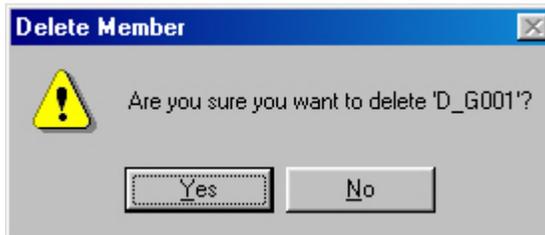
3. Double-left-click with the mouse in any text field containing information to be changed and type in the correct information with the keyboard. Make the necessary changes to each text field and left-click with the mouse on the button.

2.2.4 Delete User:

1. In the **Users** table, select the user's row of information to be deleted by placing the mouse in the gray box to the left of the user's SHORT NAME and left-clicking once.



2. Left-click with the mouse on the **Delete** button. The **Delete Member** attention box appears.



3. Left-click with the mouse on the **Yes** button to confirm that the user should be deleted from the **User** table.

2.3 Security

To enforce security it is highly suggested to create a unique username and password for each user of the Quest Lite application.

To limit the number of users who have access to the user screen it is important to designate an administrator. The administrator should be the only user who has access to the user screen. This can be done by checking the Admin Role in the user screen for only the administrator.

To change the login name and password for a user please follow the instruction provided in chapter 2.Setup, Section 2.2 Users, Sub-Section 2.2.3 Edit Current User. This is located on page 32.

3. Bid Submission Steps

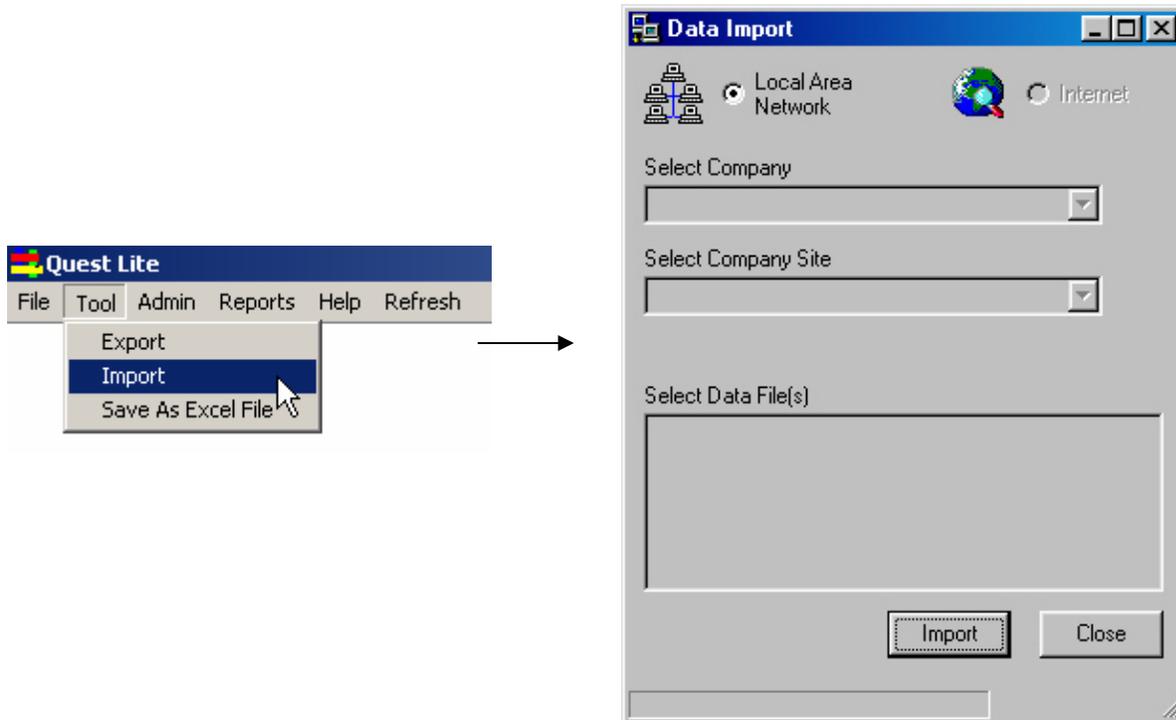
This chapter provides the step-by-step instructions and descriptions for a Bid Submission to the Rhode Island Department of Transportation.

- 3.1 Import a File
- 3.2 Enter Bid Prices
- 3.3 Meet all Certification of Bidding Requirements (If Applicable)
- 3.4 Apply Bidder Information to Contract
- 3.5 Confirm Default Printer
- 3.6 Print the Bid Report
- 3.7 Export the Bid File
- 3.8 Follow Bidding requirements and conditions per Rhode Island Department of Transportation and Rhode Island Department of Administration's Purchasing Division
- 3.9 Import Addendum File
 - 3.9.1 Characteristics of Addendum Files

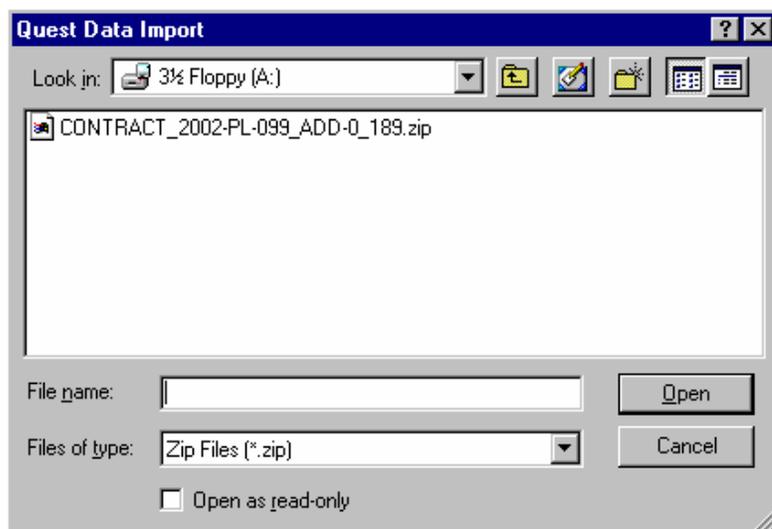
3.1 Import File

This function is used to import the contract file from Quest for creating the bid submission file for a contract. This file will be distributed by RIDOT. The file will look similar to this: CONTRACT_RICNumber_ADD-0_189.zip

1. In the toolbar, left-click with the mouse on Tool and then Import in the menu provided. The Data Import box appears.



2. Left-click with the mouse on the  button, located on the bottom of the **Data Import** box. The **Quest Data Import** browser appears.



3. In the browser, use the drop-down menu to select the drive or folder that contains the contract. Look in the A: drive if the file was on a floppy disk or the drive that is assigned to your CD-ROM if the file was on a CD. The contract will be a .zip file.
4. Left-click with the mouse on the file to highlight the contract, which will look similar to CONTRACT_RICNumber_ADD0_189.zip
5. Left-click with the mouse on the  button in the **Quest Data Import** browser. A message appears informing you the file has been imported.

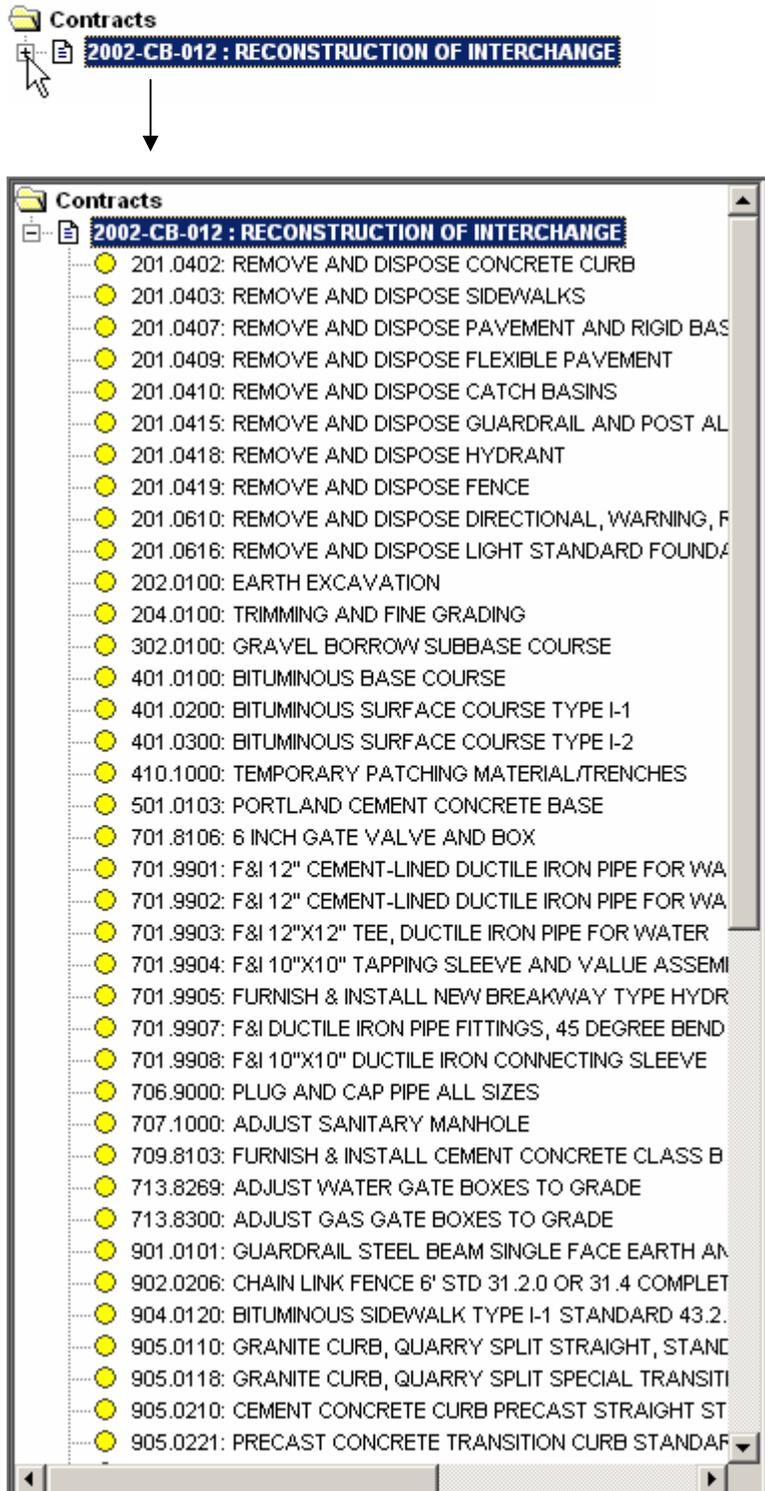


6. Left-click with the mouse on the  button in the **Data Import** message box.
7. Left-click with the mouse on the  button in the **Data Import** box.

3.2 Enter Bid Prices

This function is used to enter in the unit price for each item in the contract.

1. Left-Click with the mouse on the plus sign,  to the left of the contract to view the information needed.



- Left-click with the mouse on an item in the list and all items to be bid on will be displayed on the right side of the screen.

Quest Lite: 2002-CB-012 : REHABILITATION OF THE INTERCHANGE

File Tool Admin Reports Help Refresh

Legend: Item Closed Item Deleted Item Open N/A Not Applicable

Total: \$0.00

Item	Item	Description	Quantity	Unit	Unit Bid Price	Amount (P x Q)
001	201.0402	REMOVE AND DISPOSE CONCRETE CURB	565.00	LF	\$ 0.00	\$0.00
002	201.0403	REMOVE AND DISPOSE SIDEWALKS	770.00	SY	\$ 0.00	\$0.00
003	201.0407	REMOVE AND DISPOSE PAVEMENT AND RIGID BASE	2,670.00	SY	\$ 0.00	\$0.00
004	201.0409	REMOVE AND DISPOSE FLEXIBLE PAVEMENT	2,600.00	SY	\$ 0.00	\$0.00
005	201.0410	REMOVE AND DISPOSE CATCH BASINS	1.00	EACH	\$ 0.00	\$0.00
006	201.0415	REMOVE AND DISPOSE GUARDRAIL AND POST ALL TYPES	485.00	LF	\$ 0.00	\$0.00

- Left-click with the mouse in the yellow text box for each item. If the text box is gray, this means that the price is set to the only acceptable bid price. This is set by RIDOT and cannot be changed.
- Type the bid price with the number pad and press the Enter key on the keyboard. By pressing the Enter Key, the cursor will move to the next item price on the screen.

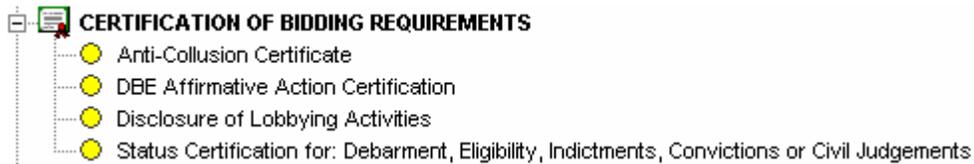
NOTE: If you do not push Enter the price will not be saved.

- The list of items in the tree view will have an icon to the left. Yellow means that the item still needs a bid price. Green with a checkmark means the item has a bid price. The red means that the item was deleted.

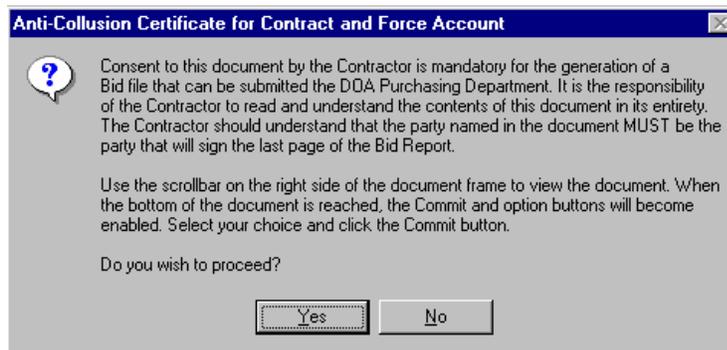
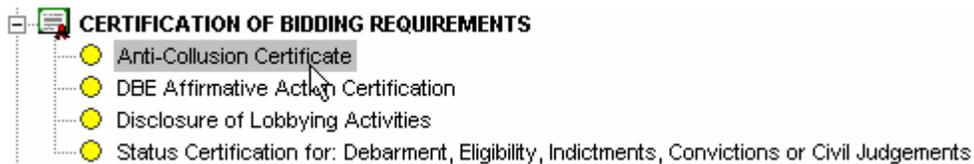
3.3 Certification of Bidding Requirements (If Applicable)

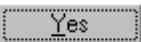
The documents included here must be correctly answered for the bid to be completed. These instructions are for all documents required by RIDOT for final bid submission as of August 14, 2002. Additions, deletions, and/or revisions will be addressed on a contract-by-contract basis.

1. Anti-Collusion Certification
 - a. Left-click with the mouse on the  sign to the left of  **CERTIFICATION OF BIDDING REQUIREMENTS** to view all required documents for the contract.

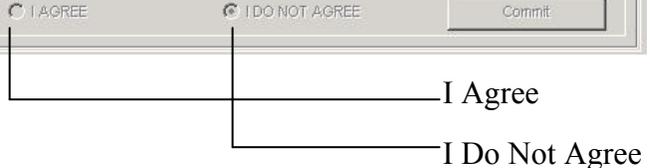
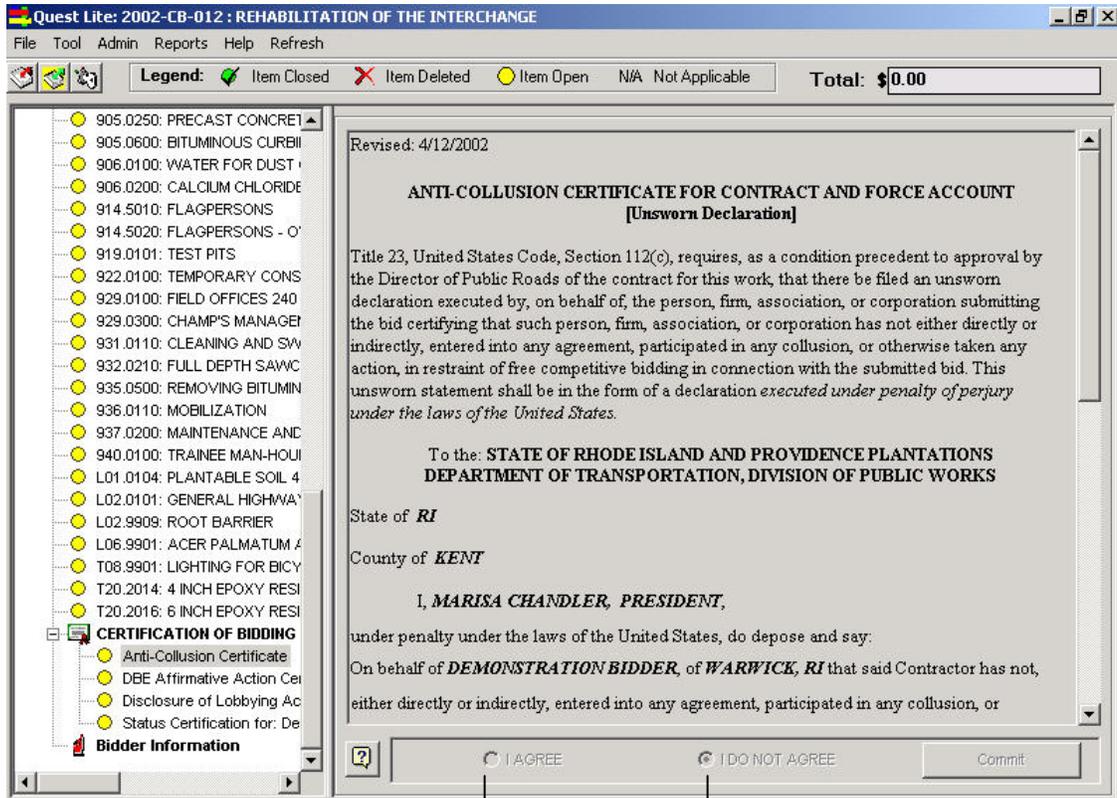


- b. Left-click with the mouse on the Anti-Collusion Certificate node in the tree view. The following message window appears.



- c. Left-click with the mouse on the  button. On the right side of the screen, the document will be displayed.

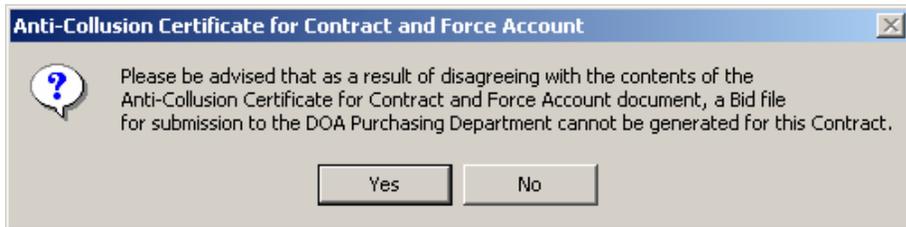
- d. Read the document by using the scroll bar. When you have finished reading the document, use the bidder certification agreement options to choose I Agree or I Do Not Agree.

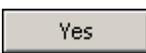


If you do not agree...

- i. If you do not agree to the document, left-click with the mouse in the circle to the left of “I Do Not Agree.”

- ii. Left-click with the mouse on the  button. The following message appears.

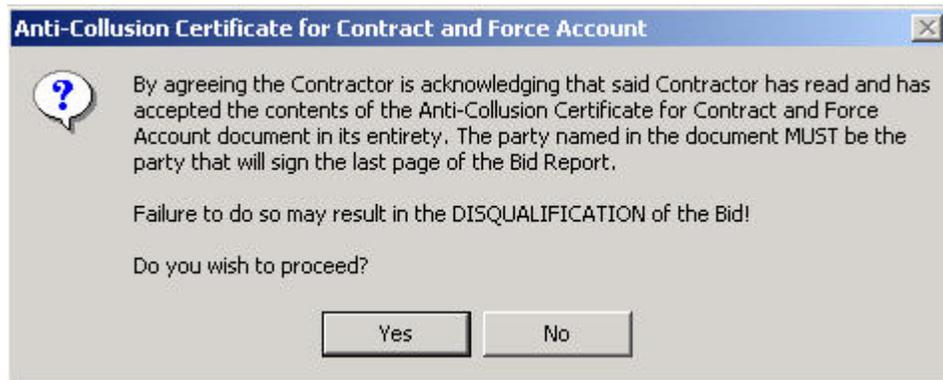


- iii. Left-click with the mouse  button. A yellow dot ● will appear next to the Anti-Collusion Certificate node in the tree view and the bid file cannot be generated and submitted.

- iv. To change the answer to “I Agree”, begin with the first steps for the Anti-Collusion Document and follow the steps through “If you agree....”

If you agree...

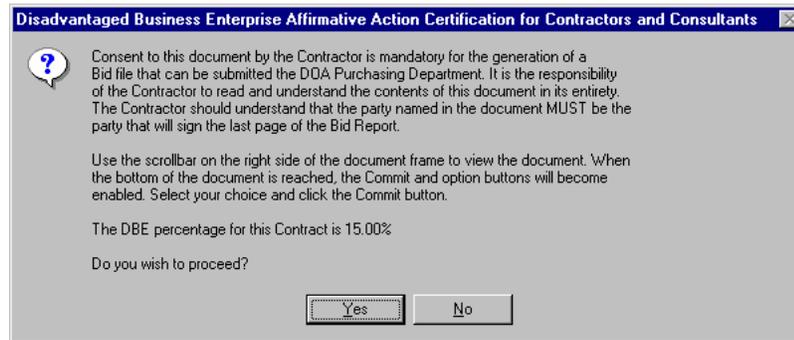
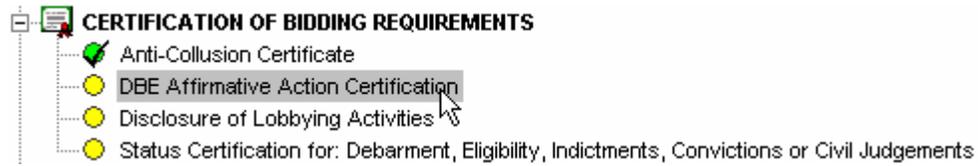
- i. If you do agree to the document, left-click with the mouse in the circle to the left of “I Agree.”
- ii. Left-click with the mouse on the  button. The following message appears.



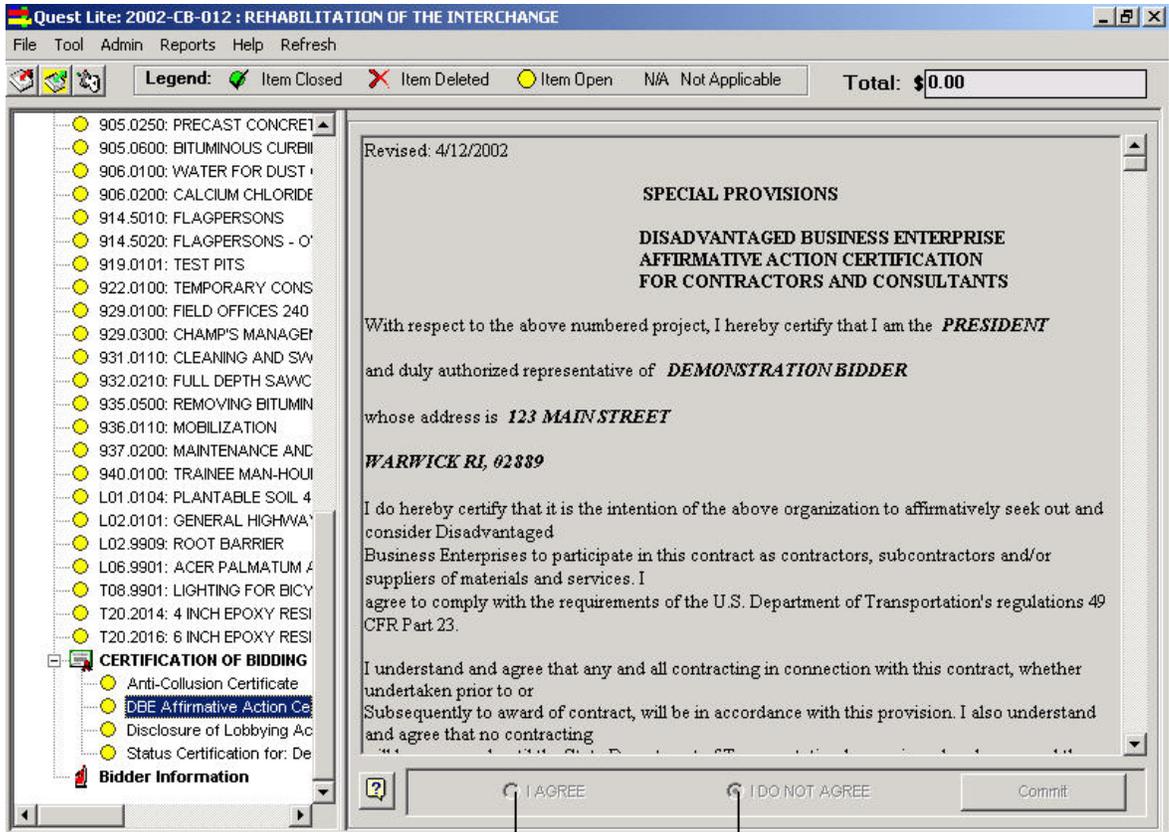
- iii. Left-click with the mouse on the  button. A green checkmark ✓ will appear next to the Anti-Collusion Certificate node in the tree view.
- iv. To change the answer to “I Do Not Agree”, begin with the first steps for the Anti-Collusion Document and follow the steps through “If you do not agree....”

2. DBE Affirmative Action Certification

- a. Left-click with the mouse on the DBE Affirmative Action Certificate node in the tree view. The following message window appears.



- b. Use the mouse to left-click on the  button. On the right side of the screen, the document will be displayed.
- c. Read the document by using the scroll bar, when you have finished reading the document use the bidder certification agreement options to choose I Agree or I Do Not Agree.



I Agree

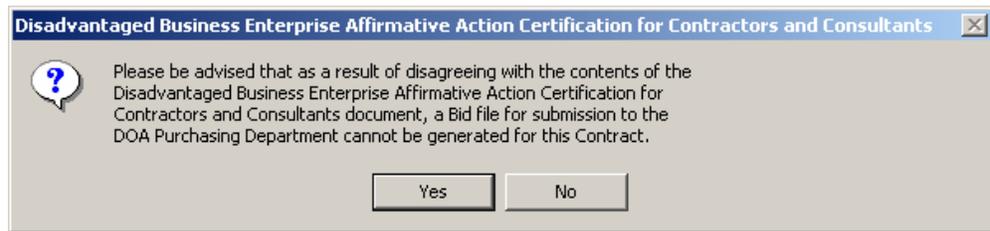
I Do Not Agree

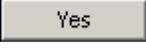
If you do not agree...

- i. If you do not agree to the document, left-click with the mouse in the circle to the left of “I Do Not Agree.”



- ii. Left-click with the mouse on the  button. The following message appears.

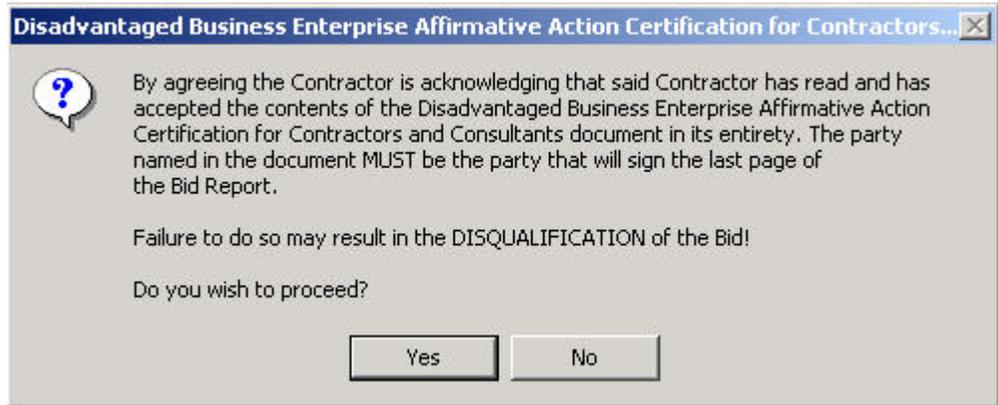


- iii. Left-click with the mouse on the  button. A yellow dot ● will appear next to the DBE Affirmative Action Certification node in the tree view and the bid file cannot be generated and submitted.

- iv. To change the answer to “I Agree”, begin with the first steps for the DBE Affirmative Action Document and follow the steps through “If you agree....”

If you agree...

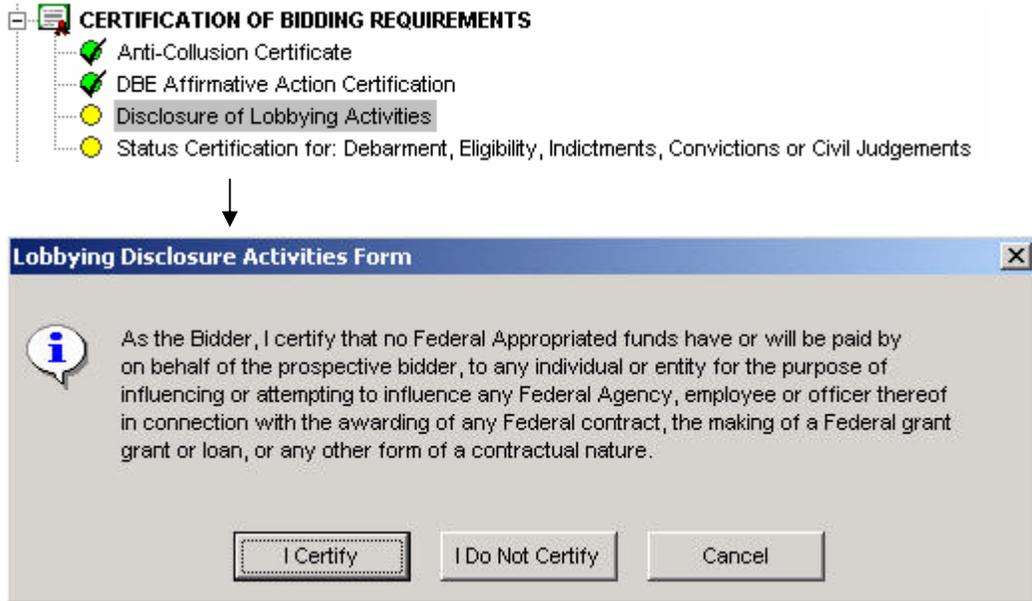
- i. If you do agree to the document, left-click with the mouse in the circle to the left of “I Agree.”
- ii. Left-click with the mouse on the  button. The following message appears.



- iii. Left-click with the mouse on the  button. A green checkmark ✓ will appear next to the DBE Affirmative Action Certification node in the tree view.
- iv. To change the answer to “I Do Not Agree”, begin with the first steps for the DBE Affirmative Action Document and follow the steps through “If you do not agree....”

3. Disclosure of Lobbying Activities Document

- a. Left-click with the mouse on the Disclosure of Lobbying Activities Document node in the tree view. The **Lobbying Disclosure Activities Form** message box appears.



If you certify...

- i. Left-click with the mouse on the  button in the **Lobbying Disclosure Activities Form** message box. A new message box will appear.



If there are other funds to report...

1. Left-click with the mouse on the  button. The Lobbying Disclosure Form will appear.

**Complete this form to disclose lobbying activities
pursuant to 31 U.S.C. 1352 - 0348 - 0046**

<p>1. Type of Federal Action:</p> <input type="radio"/> a. contract <input type="radio"/> b. grant <input type="radio"/> c. cooperative agreement <input type="radio"/> d. loan <input type="radio"/> e. loan guarantee <input type="radio"/> f. loan insurance	<p>2. Status of Federal Action</p> <input type="radio"/> a. bid/offer/application <input type="radio"/> b. initial award <input type="radio"/> c. post-award	<p>3. Report Type:</p> <input type="radio"/> a. initial filing <input type="radio"/> b. material charge
--	--	--

For Material Change Only:
 year: quarter:
 date of last report:

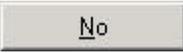
<p>4. Name and Address of Report Entity:</p> <input type="text"/> (Name) <input type="text"/> (Address) <input type="text"/> <input type="text"/> (City) (State) <input type="text"/> <input type="text"/> (ZIP) <input type="text"/> Congressional District, if known: <input type="text"/>	<p>5. If Reporting Entity in No. 4 is Subawardee, Enter Name and Address of Prime</p> <input type="text"/> (Name) <input type="text"/> (Address) <input type="text"/> <input type="text"/> (City) (State) <input type="text"/> <input type="text"/> (ZIP) <input type="text"/> Congressional District, if known: <input type="text"/>
---	--

<p>6. Federal Department Agency:</p> <input type="text"/>	<p>7. Federal Program Name/Description:</p> <input type="text"/> CFDA Number, if applicable: <input type="text"/>
---	--

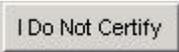
<p>8. Federal Action Number, if known:</p> <input type="text"/>	<p>9. Award Amount, if known</p> <input type="text" value="\$0.00"/>
---	--

2. Left-click with the mouse on the button and fill in the information for each lobbying activity.
3. When completed entering the lobbying activity, left-click with the mouse on the button.
4. If there is more then one lobbying activity to report, left-click with the mouse on the button again and follow the steps above.
5. To view each lobbying activity reports, left-click with the mouse on the scroll buttons to view each document.

If there are not other funds to report...

1. Left-Click with the mouse on the  button.
2. An N/A sign will appear to the left of the Disclosure of Lobbying Activities node in the tree view.

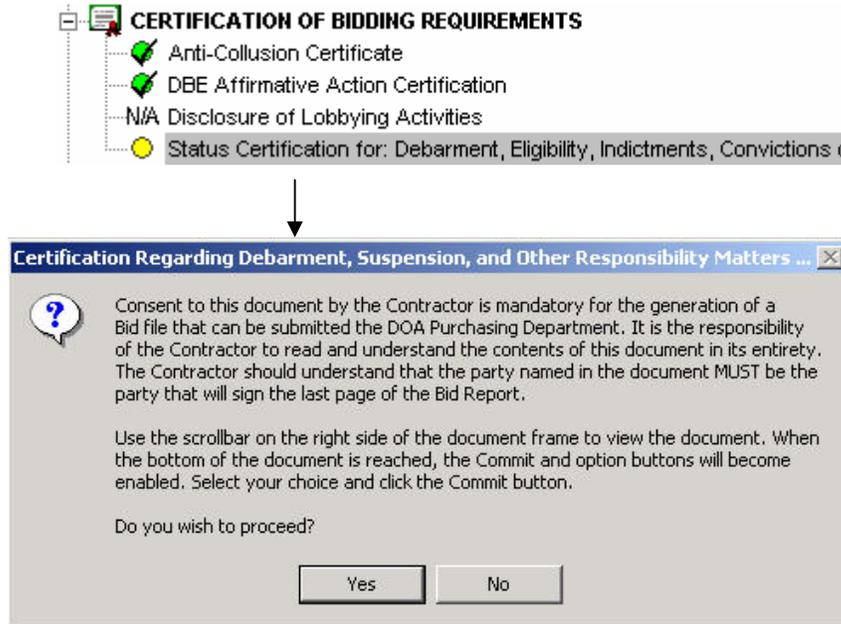
**If you do not certify...**

- i. Left-Click with the mouse on the  button in the **Lobbying Disclosure Activities Form** message box. The following message appears.

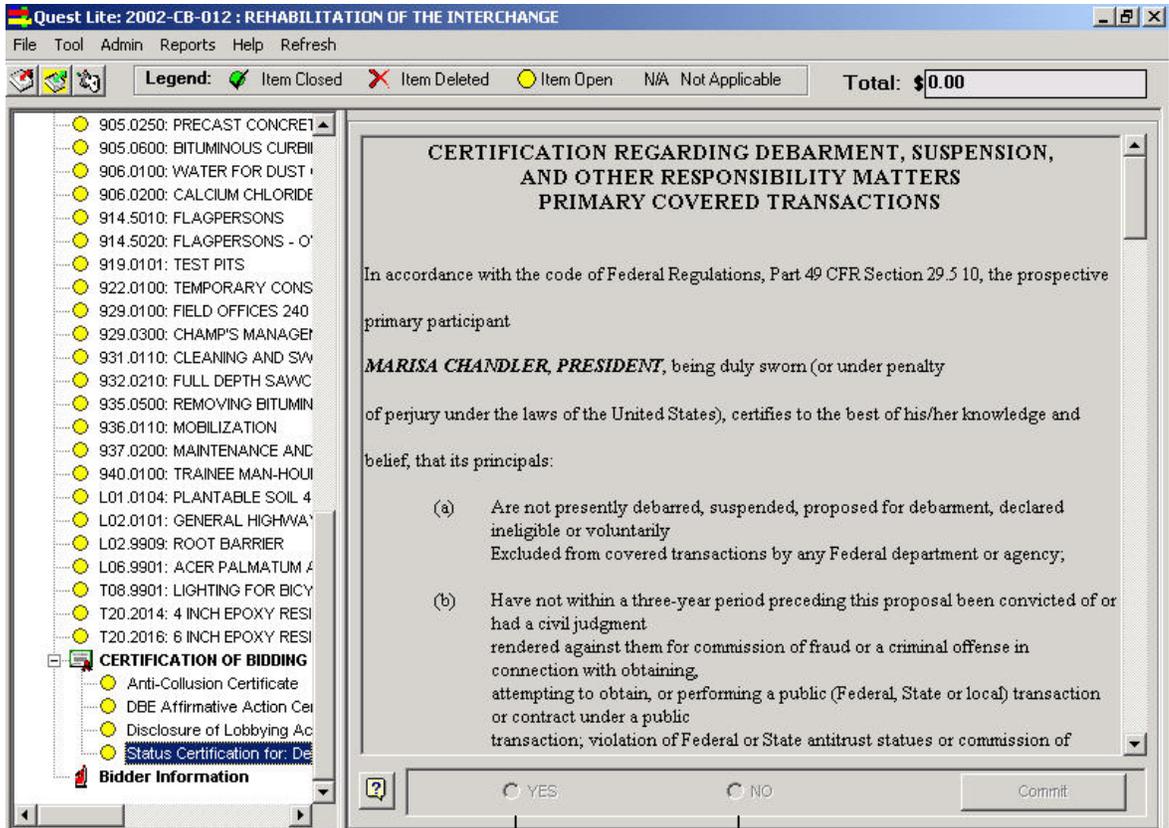


- ii. Because federal funds are being used or will be used for any lobbying activities, a bid cannot be submitted for this contract. A  will appear to the left of the Disclosure of Lobbying Activities node in the tree view.

4. Status Certification for Debarment, Eligibility, Indictments, Convictions or Civil Judgments
 - a. Left-click with the mouse on the Status Certification node in the tree view. The following message window appears.



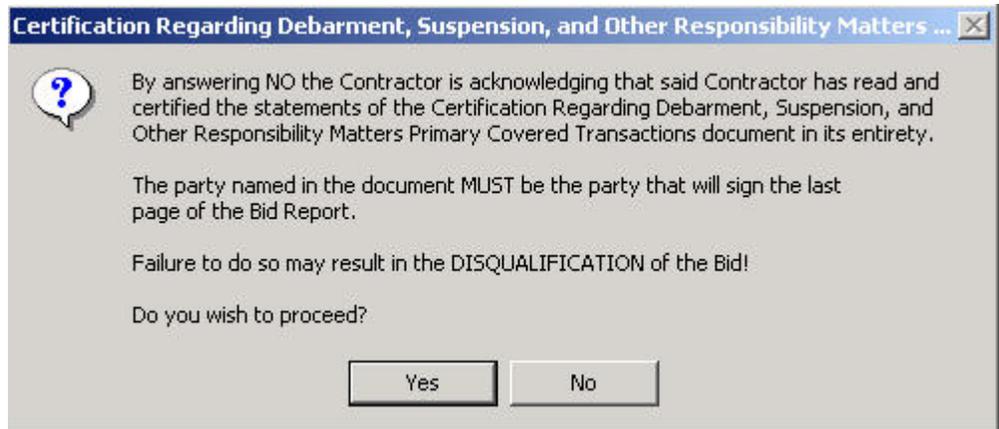
- b. Left-click with the mouse on the button. On the right side of the screen, the document will be displayed. Read thoroughly the document.
 - c. Read the document by using the scroll bar, when you have finished reading the document use the bidder certification agreement options to choose I Agree or I Do Not Agree.



Yes
No

If No...

- i. If there are no exceptions to this document, left-click with the mouse in the circle to the left of “No.”
- ii. Left-click with the mouse on the  button. The following message appears.

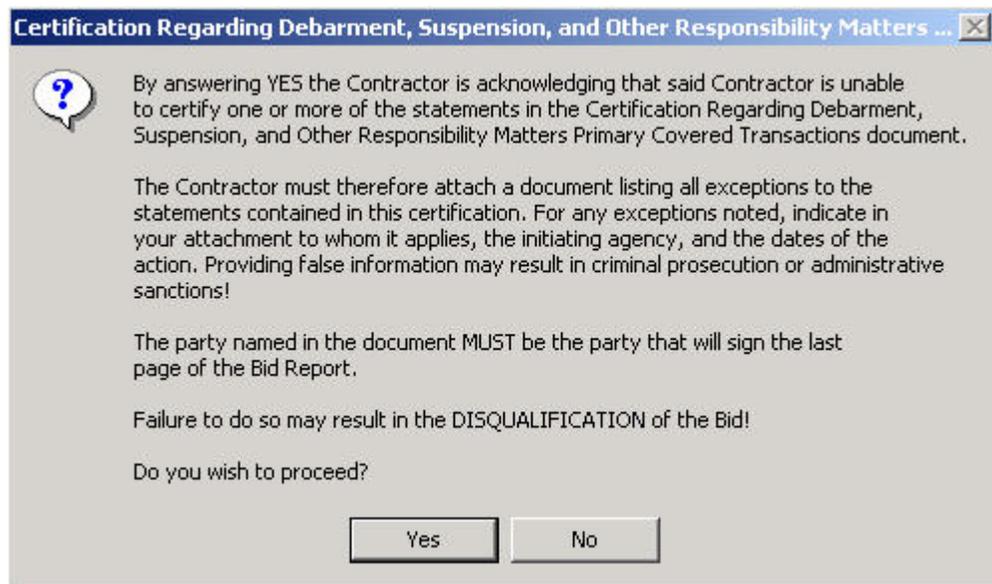


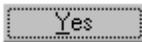
- iii. Left-click with the mouse on the  button. A green checkmark  will appear next to the Status Certification for: Debarment, Eligibility, Indictments, Convictions or Civil Judgments node in the tree view.

If Yes...

NOTE: If there are exceptions to report, you must be sure to include an explanation of the exception(s) in the bid submission.

- i. If there are exceptions to this document, left-click with the mouse in the circle to the left of “Yes.”
- ii. Left-click with the mouse on the  button. The following message appears.



- iii. Left-click with the mouse on the  button. A green checkmark  will appear next to the Status Certification for: Debarment, Eligibility, Indictments, Convictions or Civil Judgments node in the tree view.

3.4 Apply Bidder Information to Contract

This function applies the information that was entered in the Default Company Information. To enter the Default Company Information, refer to the instruction in Chapter 2. Setup, Section 2.1 Default Company Information, located on page 28. If any changes are made to the Contract Bidder Information, the changes will only be applied to the contract and not to the Company Default information.

1. Left-click with the mouse on the  **Bidder Information** icon in the tree view and the **Bidder Information** will be displayed on the right of the screen.

Contract Bidder Information

001 - TES001 = Indicates required field

Company Name:

Address 1:

Address 2:

City/Town: State: ZIP:

County: Country:

Phone: Fax: Email:

Contact:

Discipline:

Authorized Signatory:

Signatory Name:

Bid Surety:

Please be advised that the party listed as the Authorized Signatory **MUST** be the party that will sign the last page of the Bid Report.
Failure to do so may result in the DISQUALIFICATION of the Bid!

2. To retrieve the default company information (This was entered through the Default Company Information in the toolbar), left-click with the mouse on the **Get Default Data** button. The Company Information will populate the Bidder Information Fields.

Contract Bidder Information

001 - TES001 = Indicates required field

Company Name: DEMONSTRATION BIDDER

Address 1: 123 MAIN STREET

Address 2:

City/Town: WARWICK State: RI ZIP: 02889

County: KENT Country: USA

Phone: 401-275-5840 Fax: 401-275-5843 Email: QUEST@PLEXUSCORP.COM

Contact:

Discipline:

Authorized Signatory: President

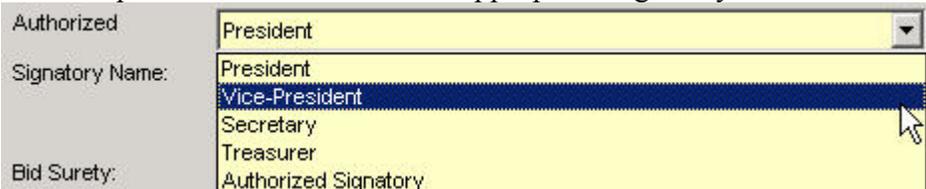
Signatory Name: MARISA CHANDLER

Bid Surety:

Please be advised that the party listed as the Authorized Signatory MUST be the party that will sign the last page of the Bid Report.

Failure to do so may result in the DISQUALIFICATION of the Bid!

Apply Changes **Get Default Data**

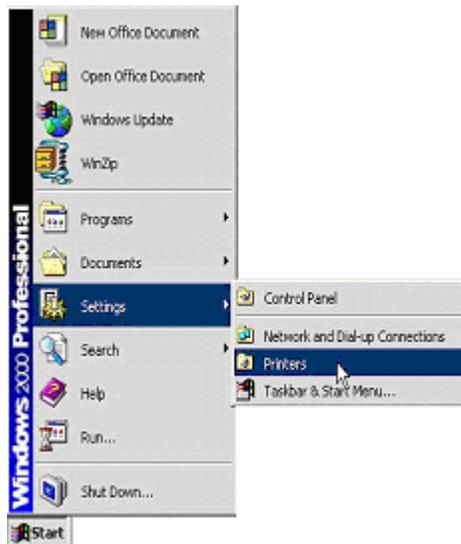
3. The authorized signatory must be selected.
- i. Use the drop-down menu to select the appropriate signatory.
 
 - ii. Select an officer from the menu provided by left-clicking with the mouse on the Signatory Name in the menu.
 - iii. If Authorized Signatory is selected, use the keyboard to type the Name and Title for the Authorized Signatory.
 - iv. If any other officer was selected, the name field will automatically populate with the officer's name.
 - v. The bid surety must be entered.

- vi. To save the company information to the contract, left-click with the mouse on the **Apply Changes** button.

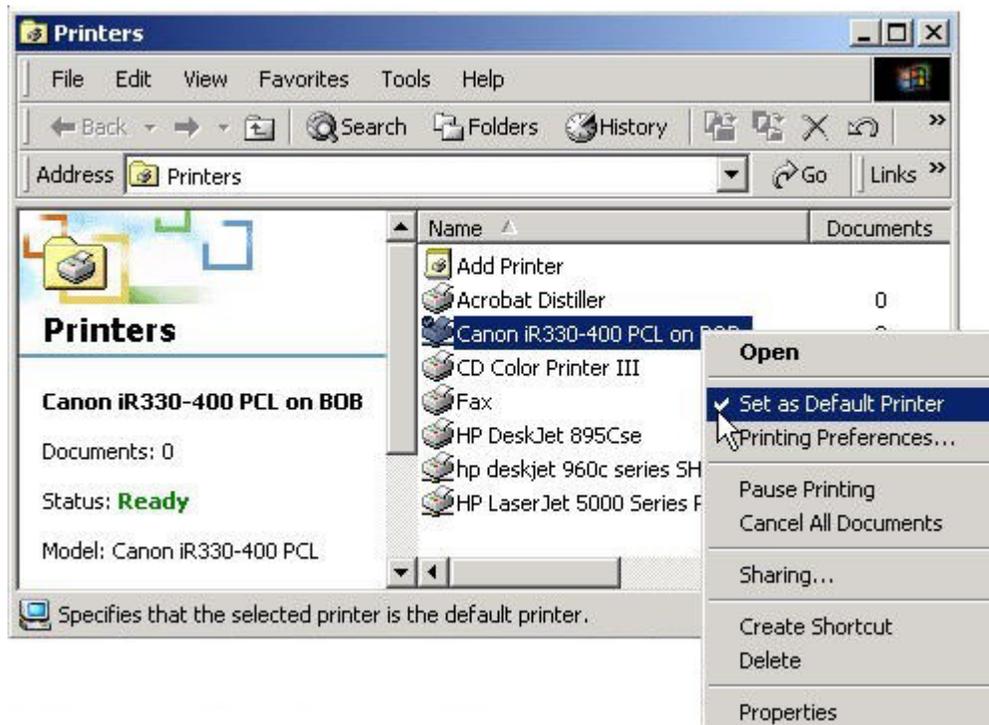
3.5 Confirm Default Printer

It is important to set the printer that will be used to print the report as the default printer. If the report is sent to a different printer other than the default printer, text may be cut off due to a different printer's margin settings.

1. Left-click with the mouse on the Start Button, then Select Settings, and then Printers.



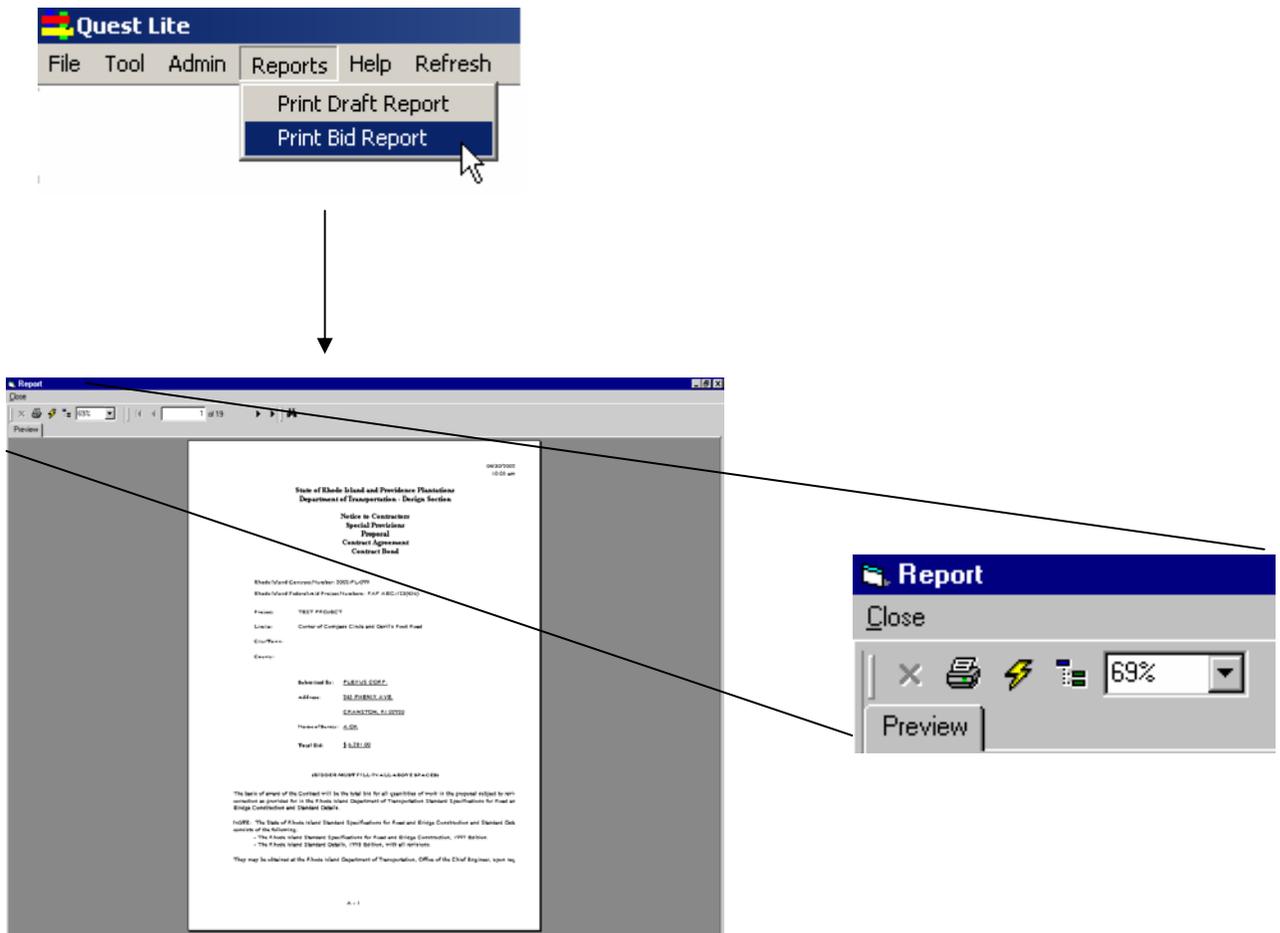
2. Right-click with the mouse on the Printer Icon. Select from the menu Set as Default Printer.



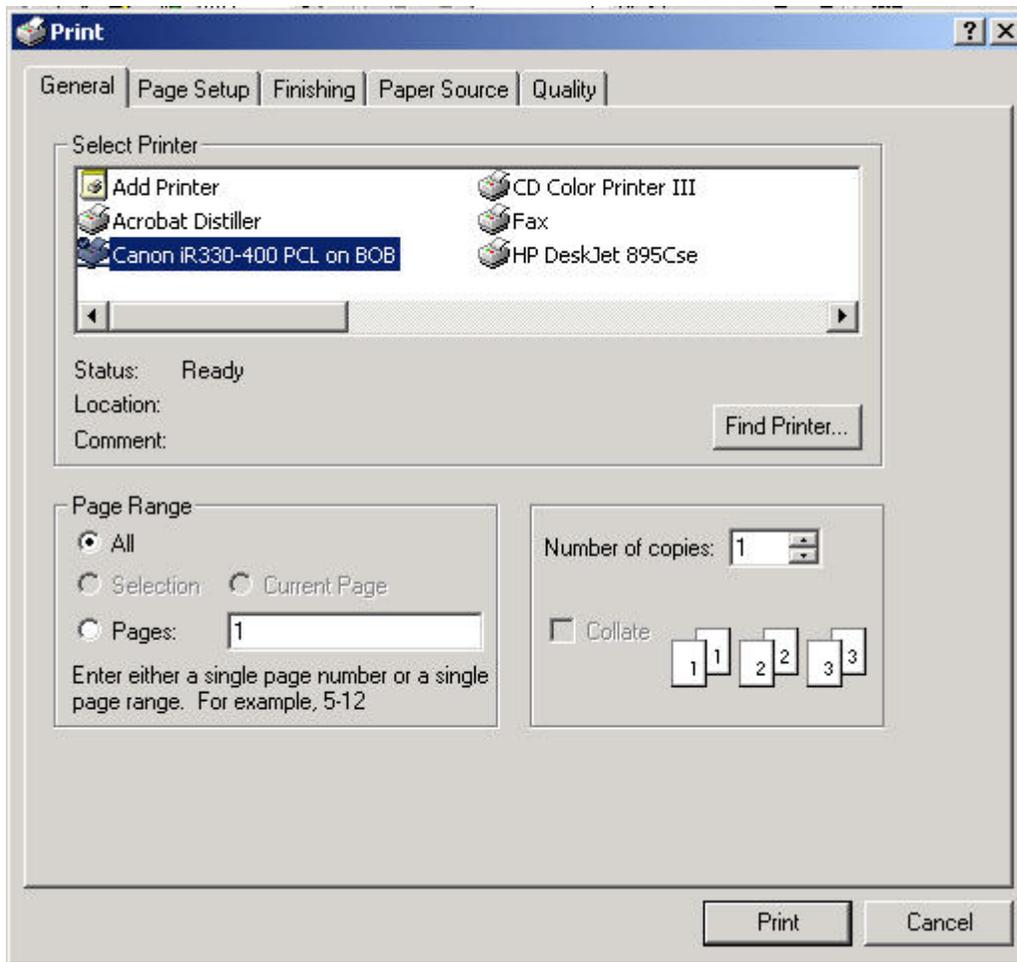
3.6 Print Bid Report

The Bid Report can only be viewed once all bid prices have been entered, contract documents have been correctly answered and company information has been applied to the contract. To view the report information before all the requirements have been met please follow instruction in Chapter 4. Added Features, Section 4.2 Create a Draft Report located on page 68.

1. In the toolbar left-click with the mouse Reports and then Print Bid Report in the menu provided. The Bid Report will display on the screen.



2. To print the bid report, left-click with the mouse on the  symbol, located in the upper-left hand corner of the Report print preview. . A Print Dialog Box similar to the below picture will display.



3. Left-click with the mouse on the  button.

3.7 Export Bid File

This function is used to create the bid file that is required to be submitted to the Rhode Island Department of Administration's Purchasing Division as part of the bid proposal.

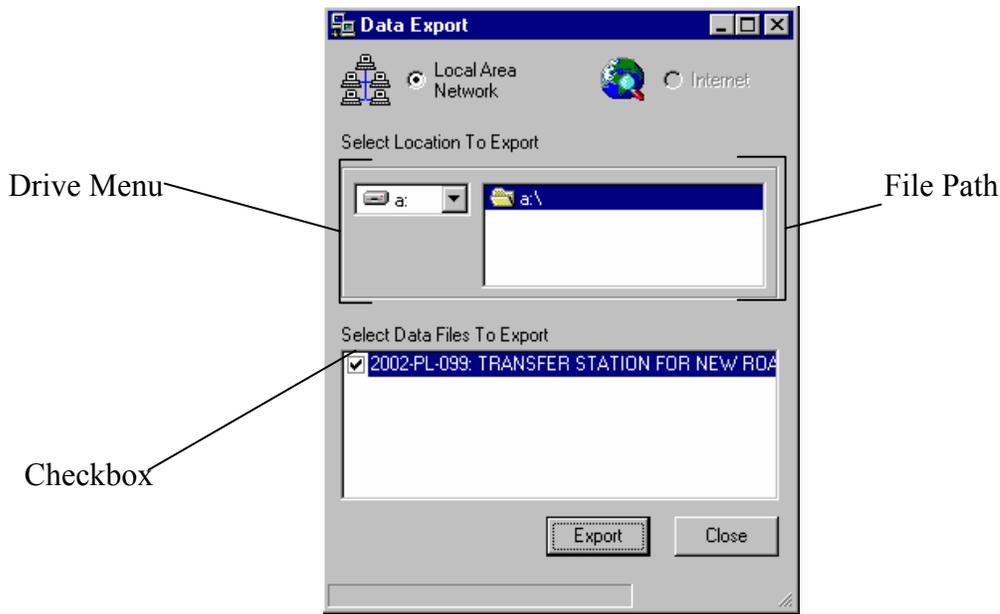
1. Select the contract to be exported by left-clicking with the mouse on the contract name in the tree view.

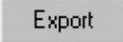


2. In the toolbar left-click with the mouse on Tool and then Export in the menu provided. The **Bidder Information Disclaimer** message box appears.

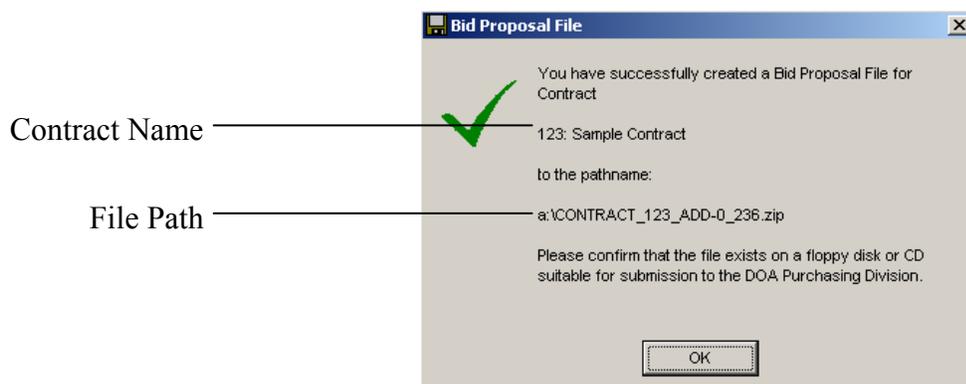


3. Left-click with the mouse on the button for the Agreement Option. If No is selected, the bid file will not be generated. The **Data Export** box appears.



4. Using the drop-down menu, select the appropriate drive and path to specify where the contract bid file will be exported.
5. Left-click with the mouse in the blank square to the left of the contract to be exported. There will now be a check mark placed here. All files with checkmarks will be exported to the specified path.
6. Left-click with the mouse on the  button. A confirmation message will appear to state the export was successful.

Note: Please note the name of the contract and where it was exported



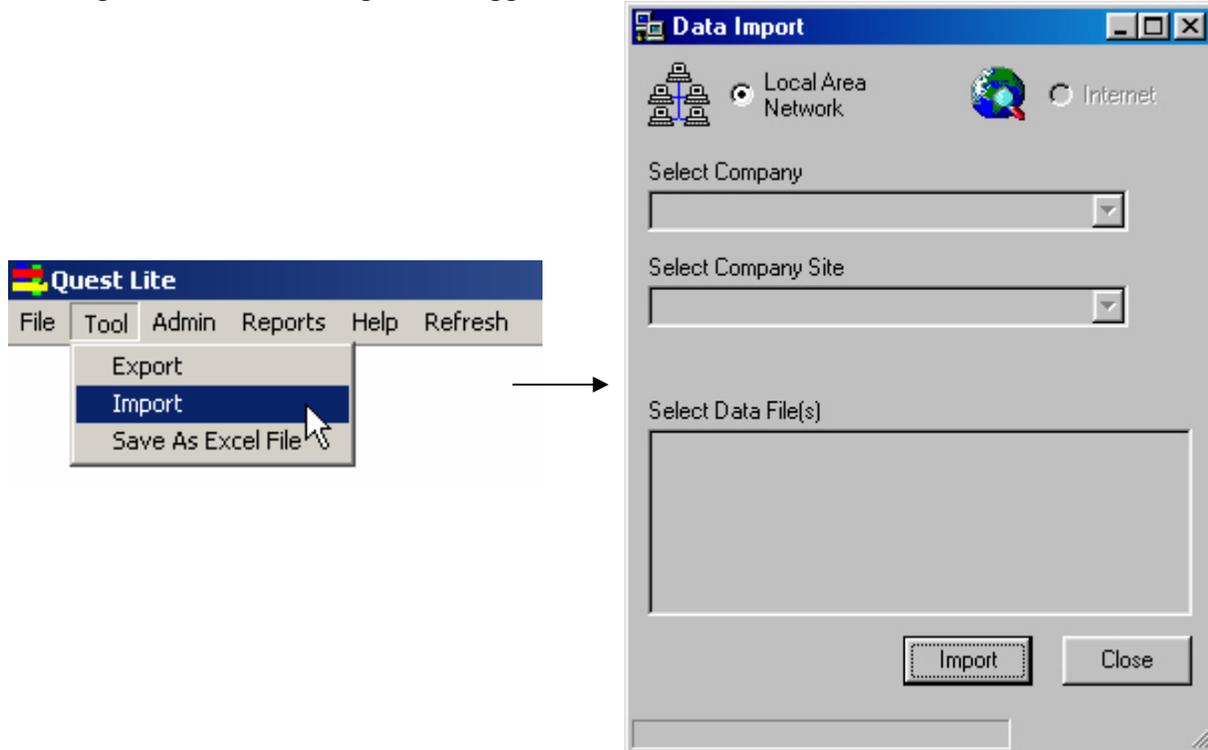
7. Left-click with the mouse on the  button.

3.8 Follow Bidding Requirements & Conditions per Rhode Island Department of Transportation and Rhode Island Department of Administration's Purchasing Division

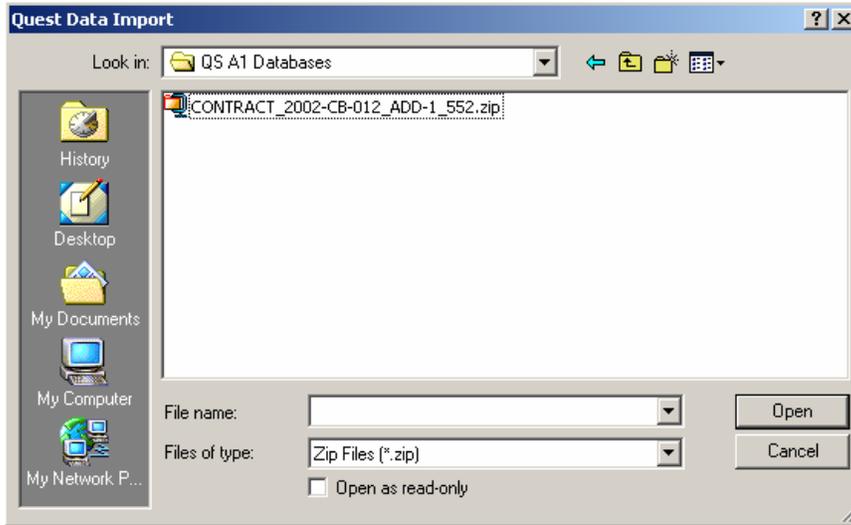
3.9 Import Addendum File

This function is used to import the contract **addendum** file from Quest for creating the bid submission file for a contract. This file will be posted on Rhode Island Department of Administration's Purchasing Division web site and be available for download or Rhode Island Department of Transportation may elect to provide the file on a CD. The file will look similar to this: CONTRACT_RICNumber_ADD-2_189.zip

- a. In the toolbar, use the mouse to left-click on Tool and then Import in the menu provided. A Data Import box appears.



2. Left-click with the mouse on the  button. The **Quest Data Import** browser will appear.



3. In the browser, left-click with the mouse on the drive or folder that contains the contract. Look in the A: drive if the file was on a floppy disk, or the drive that is assigned to the CD ROM if the file was on a CD, or the folder where the file was downloaded. The contract will be a .zip file.
4. Left-click with the mouse on the file to highlight the contract, which will look similar to CONTRACT_RICNumber_ADD2_189.zip
5. Left-click with the mouse on the  button in the **Quest Data Import** browser. The status bar will display the progress of importing the file. A message box will appear informing you the file has been imported.



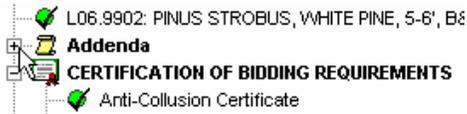
6. Left-click with the mouse on the  button in the **Data Import** message box.
7. Left-click with the mouse on the  in the **Data Import** box.

3.9.1 Characteristics of Imported Addendum Files

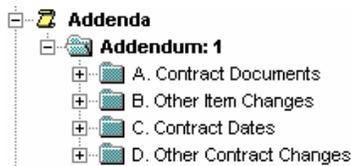
After importing the most recent bid file for a contract Quest Lite will display in the tree view any addenda to the contract and what was changed in the addenda if applicable.

To view the addenda to the contract when applicable:

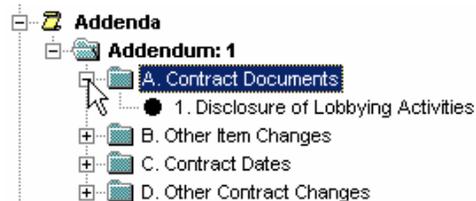
1. Left-click with the mouse on the  sign to the left of the  **Addenda** icon in the tree view. The tree view will expand to display each of the Addendum Folders.



2. Left-click with the mouse on the  sign to the left of the  **Addendum** icon in the tree view. The category folders containing the addendum information appear below the Addendum's name.



3. To view the specific change, left-click with the mouse on the  sign to the left of one of the sub-addendum folders such as  **A. Contract Documents**.



4. A specific change will appear below the folder. All changes are marked with a ● dot. Left-click with the mouse on any change listed. The **Addendum Information** window appears on the right side of the screen.

The screenshot shows the 'Addendum Information' window. At the top, it displays the contract name: '2002-PL-099 : TRANSFER SALT STORAGE FACILITIES'. Below this, there are three input fields: 'Addendum:' with the value '1', 'Date Created:' with the value '05/24/2002', and 'Date Posted:' with the value '05/31/2002'. A 'Notes:' section contains a text area with 'Addendum 1.'. Below the notes is the 'Attachment Information' section, which is titled 'A. Contract Documents'. It shows a table with one entry: '1.' and 'Disclosure of Lobbying Activities'. Below the table is a text area containing the message: 'Disclosure of Lobbying Activities Contract document added.'

On the left side of the screenshot, there is a tree view showing the folder structure. The folder 'Addendum: 1' is expanded, and the sub-folder 'A. Contract Documents' is selected. Under 'A. Contract Documents', the file '1. Disclosure of Lobbying Activities' is highlighted with a blue selection bar. A mouse cursor is positioned over this file. Three arrows point from the text labels 'Addendum Notes', 'Description of specific change', and 'Addendum Notes' to the corresponding parts of the screenshot.

5. In the lower part of the window the **Attachment Information** window will display the exact change that occurred to the file. In this example, the Disclosure of Lobbying Activities Contract was added.

4. Added Features

This chapter provides the description and the step-by-step instructions for added features provided in Quest Lite.

- 4.1 Create Excel File
- 4.2 Create Draft Report
- 4.3 Delete Contract
- 4.4 Refresh

4.1 Create Excel File

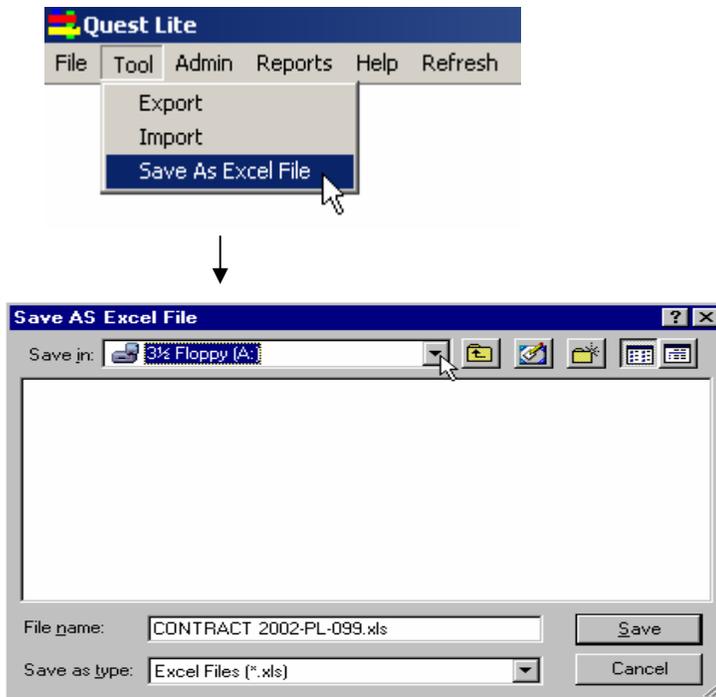
This function is used to export the current item information into an Excel file. The Excel spreadsheet will display the item's sequence number, item code, item description, item's total quantity, item's bid price, and the total amount for the item (Quantity * Bid Price) for the contract into an Excel file.

NOTE: This function is only applicable if Microsoft Excel 7.0 (Office 97) or higher is installed on your computer.

1. Left-click with the mouse on the contract in the tree view.

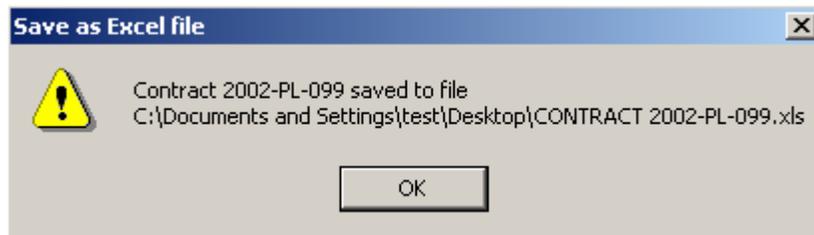


2. In the toolbar left-click with the mouse on Tool and then Save As Excel in the menu provided. A window will appear allowing to select where the excel file should be saved.



3. Select the correct path and left-click with the mouse on the  button.

4. A confirmation message appears to inform you that the excel file has been created. This file can now be viewed using Microsoft Excel 7.0 (Office 97) or higher.



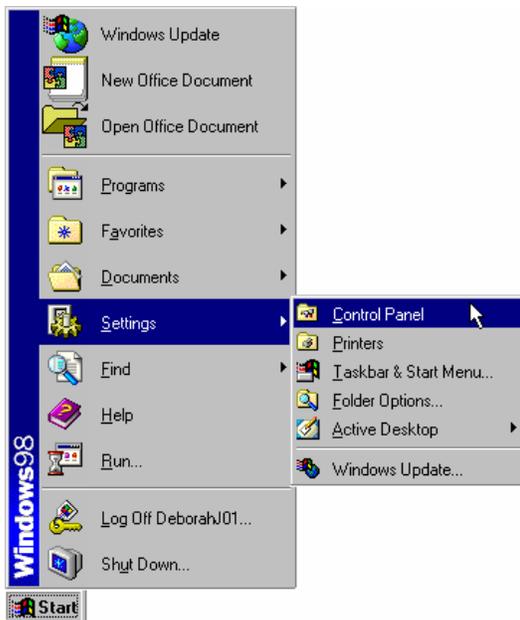
5. Left-Click with the mouse on the  button.

4.2 Create Draft Report

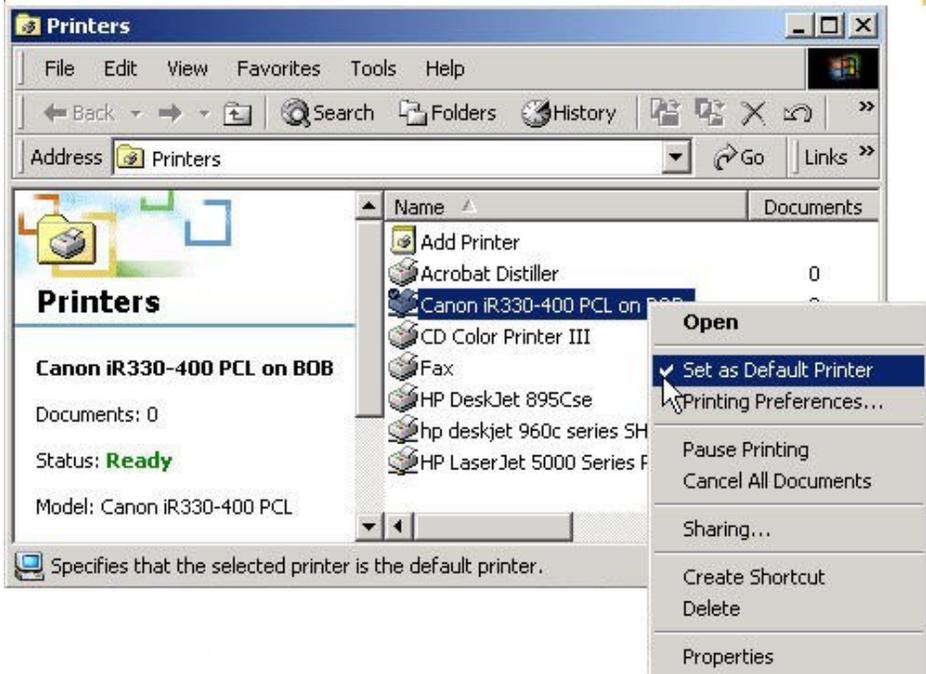
This report can be generated at anytime during the process of the bid submission. This report can be generated at any time in the bid process for a contract. There is a watermark on this report therefore this report cannot be submitted to RIDOT with the bid file. The Bid Report must be submitted.

Before attempting to print a report, follow the steps below to ensure the correct default printer has been selected to ensure the report will generate with the correct margins. If the report is sent to a different printer other then the default printer, text may be cut off due to a different printer's margin settings.

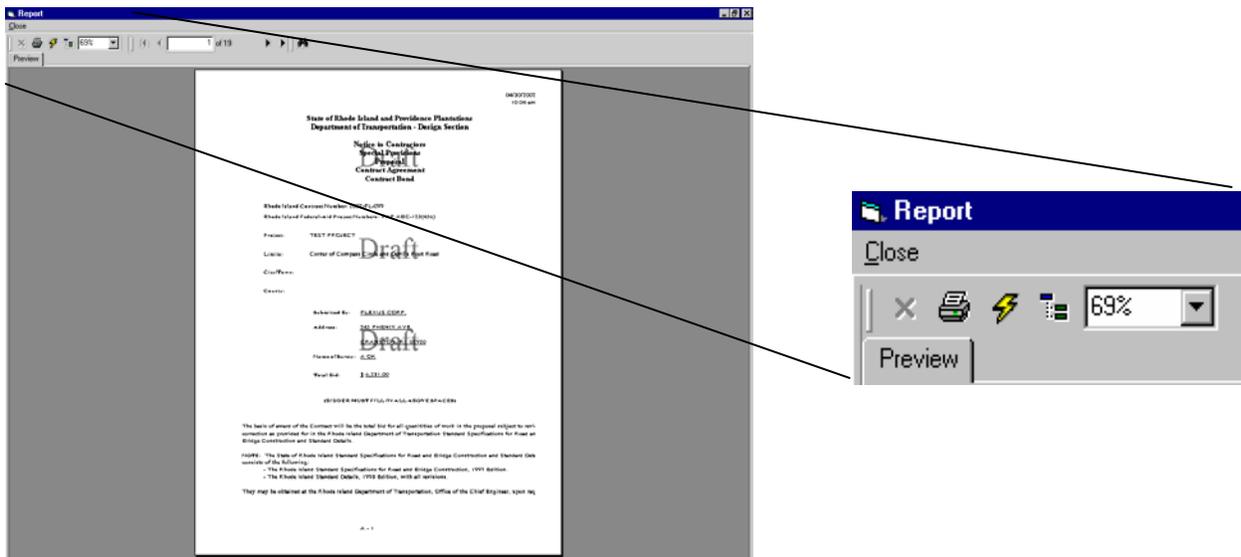
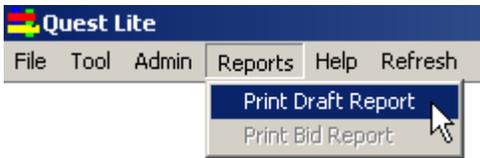
1. Left-click with the mouse on the Start button, then Setting and then Control Panel.



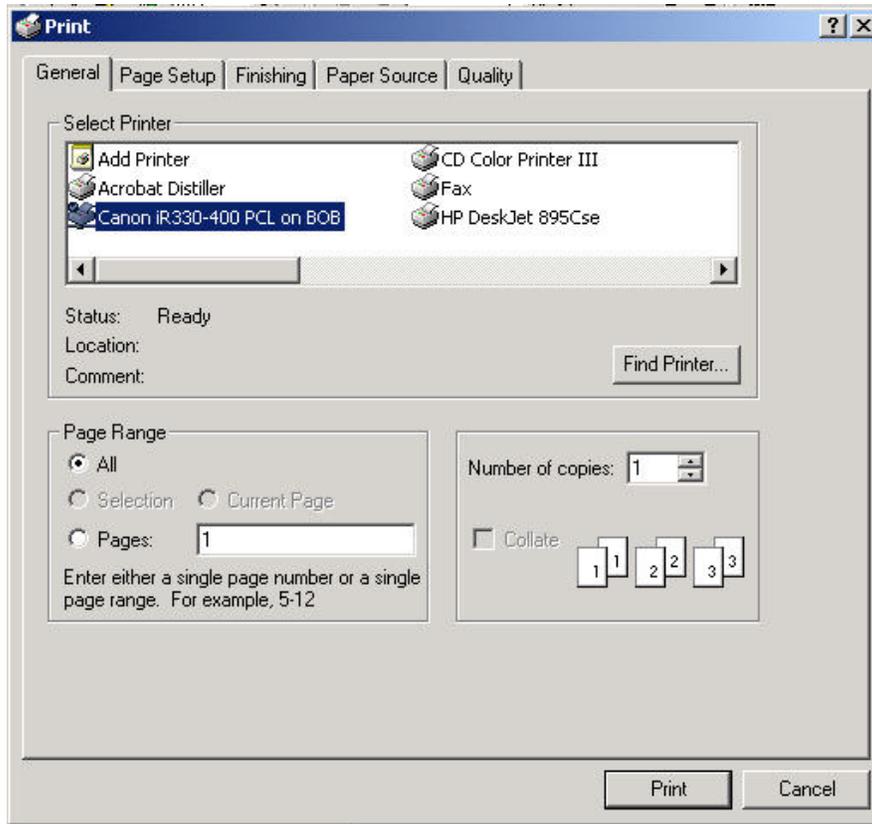
2. Right-click with the mouse on the icon for the printer to be used in printing the report and select from the menu Set as Default Printer.



3. In the toolbar left-click with the mouse on Reports and then Print Draft Report in the menu provided. The Draft Report will display on screen.



- To print the draft report, left-click with the mouse on the  symbol, located in the upper-left hand corner of the Report print preview. A Print Dialog Box similar to the below picture will display.



- Left-click with the mouse on the  button.

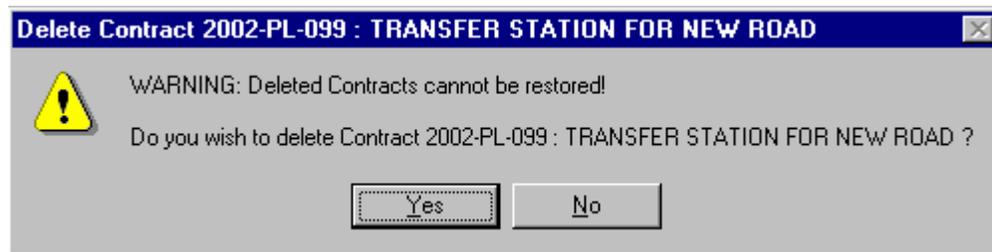
4.3 Delete Contract

This function will delete a contract from Quest Lite. It is important to note that once a contract has been deleted it can not be restored.

1. Left-click with the mouse on the contract you want to delete in the tree view.



2. In the toolbar left-click with the mouse on File and then Delete in the menu provided. An alert message appears asking if you are sure you want to delete the contract.

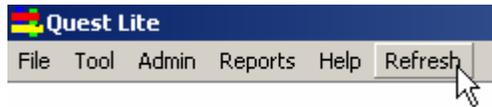


3. Left-click with the mouse on the  button.

4.4 Refresh

This will refresh the tree view to the left of the screen to display any user changes.

1. Left-click with the mouse on Refresh in the toolbar.



2. The tree view will refresh and show the most up to date information based on what information the user has entered.