<h1 style="text-align:center">QuestCDN INSTRUCTIONS - GENERAL</h1>

1.   Distribution of Bidding Documents

The City of Middleton will make digital Bid Documents available through the Quest CDN website. By selecting the City of Middleton as Owner, the projects will also appear on the City's web page. The City does not anticipate distributing project Bid Documents in hardcopy format, although rare exceptions may occur. If the Consultant has partnered with Quest, the projects may also be linked to the Consultant's web page. The following steps will be needed to make digital Bid Documents available for download.

    a. <u>Add a New Project to Quest CDN</u>

The project will need to be added to the Quest web site so that a Quest project number can be assigned. During the initial creation of a project, the bidding documents will not yet be available for upload, and the new project should be hidden until the bidding documents are finished.

Where information is entered into free text fields, formatting is generated through use of HTML tags. Tags are placed around text you wish to format, such as <B> **your text** </B> to bold your text. Some helpful HTML tags include:

- Bold   <B>   </B>
- Italic   <I>   </I>
- Underline   <U>   </U>
- Indentation (List)   <UL>   </UL>
- Line Break
- Paragraph   <P>   </P>

The Quest project advertisement is created through the following steps.

1. Enter the Quest CDN web site (www.QuestCDN.com) and log in.
2. Click on the "Projects" tab at top and select "Add New Project".
3. Select the best match from the "Project Category" descriptions. Quest allows choosing multiple category descriptions for a project.
4. Enter the project name.
5. Enter the download fee, which for the City of Middleton is the stated minimum of $15.
6. Select the Online Bidding Fee: click second radio button option (min. $10.00).
7. Enter the county (Dane), city (Middleton), and select the state (WI).
8. Provide a brief description of directions to the site. This will generally include directions using arterial roads to collector roads to the project area. When appropriate, include a property address.
9. Select from the calendar provided the date and time for opening bids. The field should automatically display the date and time in the proper format.
10. Enter information to indicate where bids will be received. This will normally be the
     City of Middleton
     Dept. of Public Works
     7426 Hubbard Ave.
     Middleton, WI 53562

11. Enter the estimated value of the project.

12. Enter the project completion date (in requested format) if known. This is optional, but can help prospective bidders determine if the project would fit into their schedule.

13. Enter any pre bid meeting information (date, time, location) if such a meeting will be held for the project. If no pre-bid meeting will be held, enter "No pre-bid meeting". This information should be shown in the Advertisement to Bid.

14. Provide a project description (4,000 character limit). Include major items of work to help prospective bidders determine if the project would be of interest to them. It would be helpful to break this information into paragraphs by using the <P> </P> HTML tags. The following Additional Description field provides extra room, but should not normally be needed. If desired, other information from the Advertisement to Bid could be included here.

15. Select "Middleton, City of" from the Owner private interface drop down list. Check the following box to automatically fill in the owner information fields. Manually modify the City project manager's name, e-mail address and phone number as appropriate. For City projects, the "Show Planholder" box should be set to "Yes".

16. Enter information for Soliciting agent. For City run projects, this information should be the same as the Owner information above. For consultant projects, information should indicate the appropriate contact person. The contact name entered here is used to sign the e-mail notifying plan holders of an addenda issuance, and the e-mail address entered here is used as the reply for addenda notification. They will normally be the same person, but do not have to be.

17. Enter plan document information to describe where bidding documents are available for review, for download, and for issuance of paper copies. In all cases, the City of Middleton should be listed as a location for review of bid documents. Digital bid documents may be downloaded through the City's web page (www.ci.middleton.wi.us) or through the Quest CDN web site (www.QuestCDN.com). Paper bid documents may be obtained from the issuing office (which could be the City or project consultant). Include costs of digital and paper bid documents.

18. Set "Project Type" to "Hidden" and provide a password. This will keep the advertisement and project information hidden from everyone except those with the password.

19. Click the "Save" button to save the above information. Quest will assign a project number, and allow subsequent modifications to the project information.

b. <u>Edit Advertisement to Bid in Project Manual to include Quest project number</u>

After Quest assigns their project number, edit the Advertisement to Bid in the project manual to reference the number. This will be needed for potential bidders reading the published advertisement to easily locate the project on the City or Quest web site.

c. Create PDF of Bidding Documents for upload to Quest

The entirety of the Bidding Documents must be uploaded to Quest as a single Adobe Acrobat PDF file. This can be done most easily by scanning a completely assembled paper copy of the project manual (including all front end documents, specifications and drawings).

After the PDF file is created, it will be very helpful to place bookmarks in the PDF file so that bidders can easily access different sections. At a minimum, this should include each of the major sections listed in the Table of Contents. It is suggested that individual drawing sheets also be bookmarked with descriptions of their content. To ensure the bookmarks will be readily accessible to bidders, set the PDF file to display the bookmarks when the file is opened. This can be done by setting the "File", "Document Properties", "Initial View" to show the "Bookmarks Panel and Page".

d. Modify Project in Quest CDN

After the PDF copy of Bid Documents has been created, it will need to be uploaded to the Quest project advertisement.

1. Log into the Quest web site and click on the "Projects" tab then on the "Modify Projects" tab. Select the appropriate project and click on the "Upload Plans" tab at the top.

2. Select the project to which you would like to attach your digital bid documents.

3. Verify that the displayed download fee (normally $10.00) is as intended.

4. Browse for and select the PDF document to be attached.

5. Click the "save" button. When the upload is complete, Quest should display a message indicating the upload was successful.

In addition to uploading the Bid Documents, contact information for architects, engineers or other firms involved with the project may be added to the project advertisement at this time. This information can be added by clicking the "a/e/gc/misc" button.

After uploading the Bid Documents, modify the Quest project advertisement to change the "Project Type" to "Open". This will allow anyone with access to the web site to read the advertisement and download the Bid Documents.

2. Issuance of Addenda

Addenda are created in much the same way as the initial Bid Documents – as a single Adobe PDF file. If the addendum is large, it is recommended that it be bookmarked and that the file be set to display the bookmarks when opened.

If an addendum changes the date or time established for opening bids, modify the project information in the Quest CDN advertisement to reflect the new "Bid Closing Date".

When an addendum is added to the project information it will automatically be sent to the electronic plan holders. To issue the addendum, log into the Quest web site and click on the "Projects" tab then on the "Modify Projects" tab. Select the appropriate project and click on the "Add Addendum" tab at the top. Fill in the form completely and accurately, as there is no capability for subsequent editing of the form. Browse for and select the PDF addendum file to be attached. Click the "save" button and review the updated list of all addenda for the project. Verify the addendum is shown in the "Available" column, which indicates it is ready for download by bidders.

An e-mail will automatically be sent to any electronic plan holder when the addendum is available for download. The e-mail address listed as the soliciting agent of the project advertisement will be notified if any e-mails fail to reach an electronic plan holder. Plan holders are also asked to reply to the soliciting agent when they receive the e-mail.

Addenda will still need to be separately issued to plan holders of paper bid documents.

3.   Updating Plan Holder List

As bidders download digital bidding documents, they are automatically added to the listing of "electronic plan holders". Firms that have purchased paper bid documents may be added to the "manual plan holder" list by modifying the project information. Log into the Quest web site and click on the "Projects" tab then on the "Modify Projects" tab. Select the appropriate project and click on the "Add Planholder / Post Results" tab at the top. Click the "Add" button at the bottom, and fill out the template for the manual plan holder. Leave the "Amount" field blank, as this is reserved for an optional means of posting the bid results. Click the "Done" button at the bottom of the main plan holder screen when finished adding manual plan holders.

4.   Post Bid Results

After the bid opening, bid results should be posted to the project information on the web page. Log into the Quest web site and click on the "Projects" tab then on the "Modify Projects" tab. Select the appropriate project and click on the "Add Planholder / Post Results" tab at the top. Click the "Bid Tab" button at the bottom, then browse for and select the bid tab file to be attached. The bid tab does not need to be in a PDF format, and may be attached as an Excel spreadsheet. Click the "Save" button to update the project information.

Bid results may also be posted to show the total price submitted by each bidder. For this, select the "Bidder" radio button, then click the "Modify" button to allow filling in the "Amount" field. When entering the amount, use whole numbers only (do not include the dollar symbol, commas, or decimal point).

Once the results are posted, the project will automatically be available in the "View Results" screen.