

The Santa Clara Valley Water District (Valley Water) conducts its Consultant Contract Selection and the procurement of Goods and General Services’ award and administration process through the Contract Administration System (CAS) web portal.

While an account is not needed to view solicitations posted on the CAS web portal, an account is necessary before firms can electronically submit a response to a solicitation. An account is also needed if firms would like to receive emails announcing consulting opportunities with Valley Water or register their business with Valley Water in order to respond to future solicitations.

Please review the information in this guide before reaching out to Valley Water staff. If you require additional help, please call the CAS hotline at (408) 630-2992.

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CREATING AN ACCOUNT

- a. Go to <http://cas.valleywater.org/>
- b. Click “Create an Account,” located in the blue box on the right-hand side of the page.



- c. Before creating a new account, you will be prompted to enter the name of your company and search for an existing account.
 - If an account is found, return to the home page and log in with the listed username. If you have forgotten your password, you may reset it by clicking “Forgot your username/password?”, entering your email address, and answering the security question. If you do not remember the answer to your security question, you will need to call the CAS hotline at (408) 630 - 2992.
- d. If no account is found, click “create new account.”
- e. **Vendor Registration. Step 1 – Create Account:** Complete all required fields. Remember to use a username, password and security question/answer that can be shared with others at your company. These cannot be easily reset if forgotten, so you may want to record them here for safe keeping:

USERNAME:	
PASSWORD:	
SECURITY QUESTION ANSWER:	

- f. Check the box to agree with the User Agreement, then click “Continue.”
- g. **Vendor Registration. Step 2 – Create Profile:** Complete all required fields.

- h. The email address entered as “Primary Email” will receive email notification when a solicitation is posted under any of the expertise codes you assign to this account (see step i). It is a good idea to use a generic company email, such as “CustomerService@Company.com,” to ensure that your company will continue to receive notices if personnel changes occur.



The screenshot shows two sections of the user interface. The first section is titled 'Add Contact' and contains a table with the following columns: Name, Expertise, Address, Phone, Fax, E-mail, and Username. The second section is titled 'Add Expertise Code' and contains a table with the following column: Expertise.

- i. **Add Contacts:** This is an optional step. When you create a contact, you have the option to assign an expertise code. This contact will receive an email notification when a solicitation is posted to the assigned code. Only one code may be assigned to a contact, but there is no limit to the number of contacts you may create for your company account.
- Click the blue “Add Contact” link, complete the required fields, and press “Submit” to save the contact.
- j. **Add Expertise Codes:** This is an optional step, however adding expertise codes is the only way to receive automatic email notification of new solicitations.
- Click the blue “Add Expertise Code” link and press “Search” to display a list of codes. Check the box next to any codes that describe goods or services your company is able to provide. Scroll to the bottom of the list and press “Add” to save the codes to your account. There is no limit to the number of expertise codes you may add to your account.
- k. **Company Organization Information:** This is an optional step. Valley Water offers a preference credit to small businesses registered with the California Department of General Services (DGS). Please indicate if your company is a small business and provide your DGS certification number in this section.
- l. Click “Register” to complete your registration.

UPDATING YOUR PROFILE

If you need to make a change to your CAS account, such as adding/removing a contact, adding/removing expertise codes, or updating the primary contact email, you may do so by following the steps outlined below.

- a. Go to <http://cas.valleywater.org/>
- b. Login using your username and password.



- c. Click “Update your profile.”
- d. After making desired changes, click “Save” to update your profile.

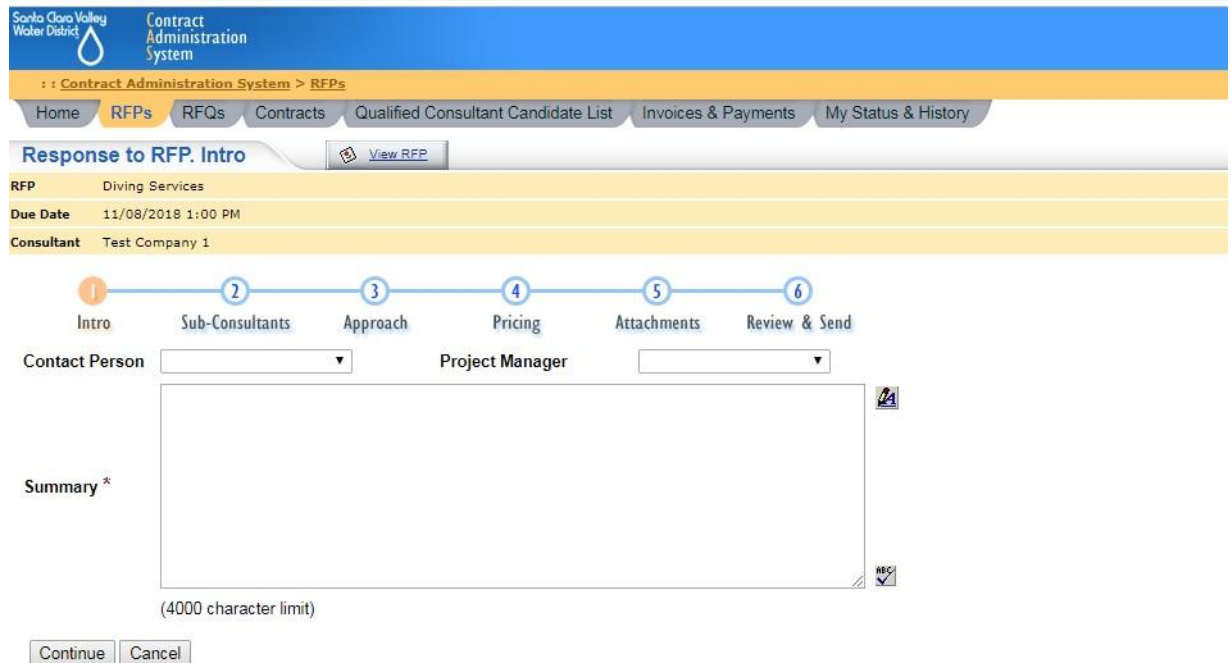


Name	Expertise	Address	Phone	Fax	E-mail	Username	Generate Account
John Doe	AE10		(707) 265-2607		johndoe@intresys.com	johndoe_0gfrn	<input type="checkbox"/>

SUBMITTING A PROPOSAL

The instructions below will guide you through submitting your proposal electronically. Please remember that some proposals must be submitted both electronically and in hard copy. For more information on submitting hard copy proposals, please see the instructions included in the solicitation packet.

- e. Go to <http://cas.valleywater.org/>
- f. Click on the title of the solicitation you are responding to.
- g. Log in with your username and password.
- h. Click “Start New Response.”
- i. To proceed, you will need to enter something into the “Summary” box, although this summary will not be scored. Your summary could be an overview of your proposal, or you may simply enter “Please refer to attachments.” The “Summary” box has a 4,000 character limit.



Santa Clara Valley Water District Contract Administration System

Contract Administration System > RFPs

Home RFPs RFQs Contracts Qualified Consultant Candidate List Invoices & Payments My Status & History

Response to RFP. Intro [View RFP](#)

RFP Diving Services

Due Date 11/08/2018 1:00 PM

Consultant Test Company 1

1 Intro 2 Sub-Consultants 3 Approach 4 Pricing 5 Attachments 6 Review & Send

Contact Person Project Manager

Summary*

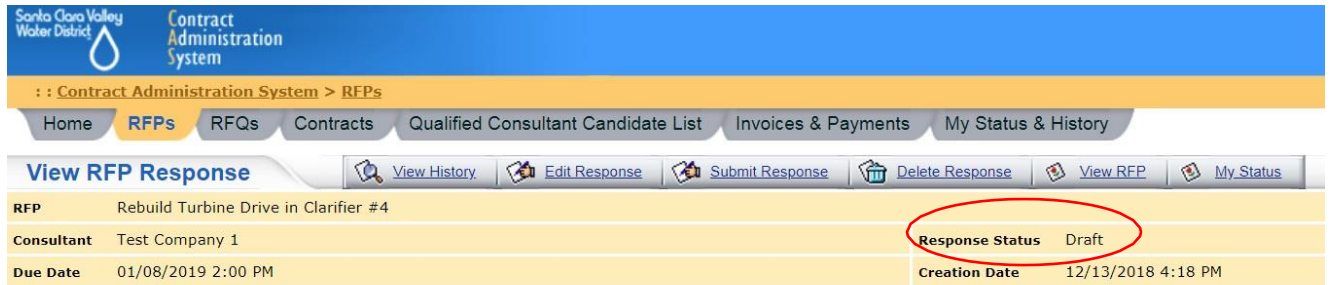
(4000 character limit)

Continue Cancel

- j. Click “Continue” to advance. By pressing the “Continue” button, your response is auto-saved in Draft mode.
- k. Advance through “Sub-consultants,” “Approach” and “Pricing.” You do

not need to enter any information for these steps.

- l. In Step 5: Attachments, you will upload your entire proposal. Please keep in mind:
 - There is no limit to the number of files you may attach
 - The maximum size allowed per file is 10 Mb
 - Only Adobe Acrobat PDF format may be attached
- m. Click “Continue” to arrive at “Review and Send”
- n. After verifying that your entire proposal has been attached, click “Submit Response.”



The screenshot shows the 'View RFP Response' page in the CAS. The breadcrumb trail is 'Contract Administration System > RFPs'. The main navigation bar includes 'Home', 'RFPs', 'RFQs', 'Contracts', 'Qualified Consultant Candidate List', 'Invoices & Payments', and 'My Status & History'. The 'View RFP Response' section has several action buttons: 'View History', 'Edit Response', 'Submit Response', 'Delete Response', 'View RFP', and 'My Status'. Below this, a table lists response details for RFP 'Rebuild Turbine Drive in Clarifier #4' by consultant 'Test Company 1'. The 'Response Status' is 'Draft', which is circled in red. The 'Due Date' is '01/08/2019 2:00 PM' and the 'Creation Date' is '12/13/2018 4:18 PM'.

RFP	Rebuild Turbine Drive in Clarifier #4	Response Status	Draft
Consultant	Test Company 1	Creation Date	12/13/2018 4:18 PM
Due Date	01/08/2019 2:00 PM		

[Intro](#)

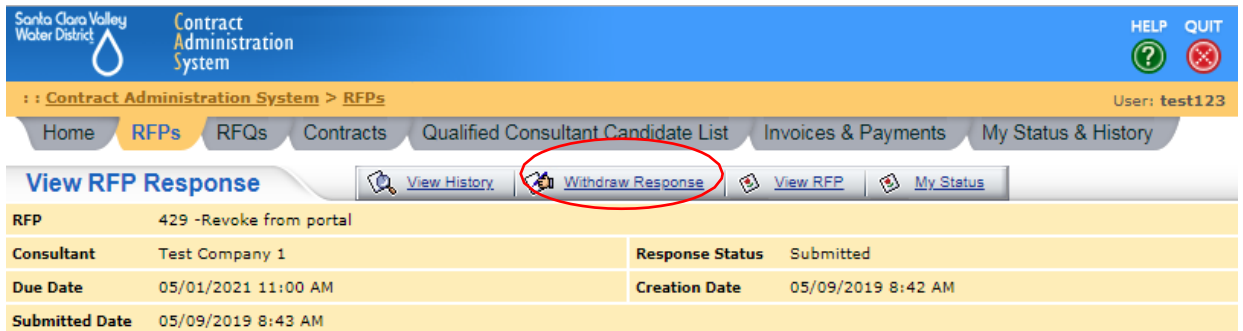
Summary x

- o. If the “Response Status” (see red circle in image above) reads “Submitted,” then your response has been received by Valley Water. You will not receive an email confirmation from CAS.

REQUEST TO WITHDRAW RESPONSE

Once a proposal has been submitted, it cannot be altered. If you need to make a change to your proposal, you will need to withdraw it. Once it is withdrawn, you can make changes and re-submit it as long as the due date and time has not passed.

- a. Go to <http://cas.valleywater.org/> and log in to the same account you used to submit the response.
- b. Click on the “RFPs” tab.
- c. Select the contract you would like to withdraw your response from. The response status should read “Submitted.”



The screenshot shows the top navigation bar of the Contract Administration System (CAS) with the following elements:

- Logo: Santa Clara Valley Water District
- Page Title: Contract Administration System
- User: test123
- Navigation Tabs: Home, RFPs, RFQs, Contracts, Qualified Consultant Candidate List, Invoices & Payments, My Status & History
- Toolbar: View RFP Response, View History, Withdraw Response (circled in red), View RFP, My Status

RFP	429 -Revoke from portal		
Consultant	Test Company 1	Response Status	Submitted
Due Date	05/01/2021 11:00 AM	Creation Date	05/09/2019 8:42 AM
Submitted Date	05/09/2019 8:43 AM		

Intro

- d. Select “Withdraw Response” from the toolbar. A confirmation will pop up. Select “OK.” Your response status will change from “Submitted” to “Revoked.”
- e. You will now be able to edit and resubmit your proposal.