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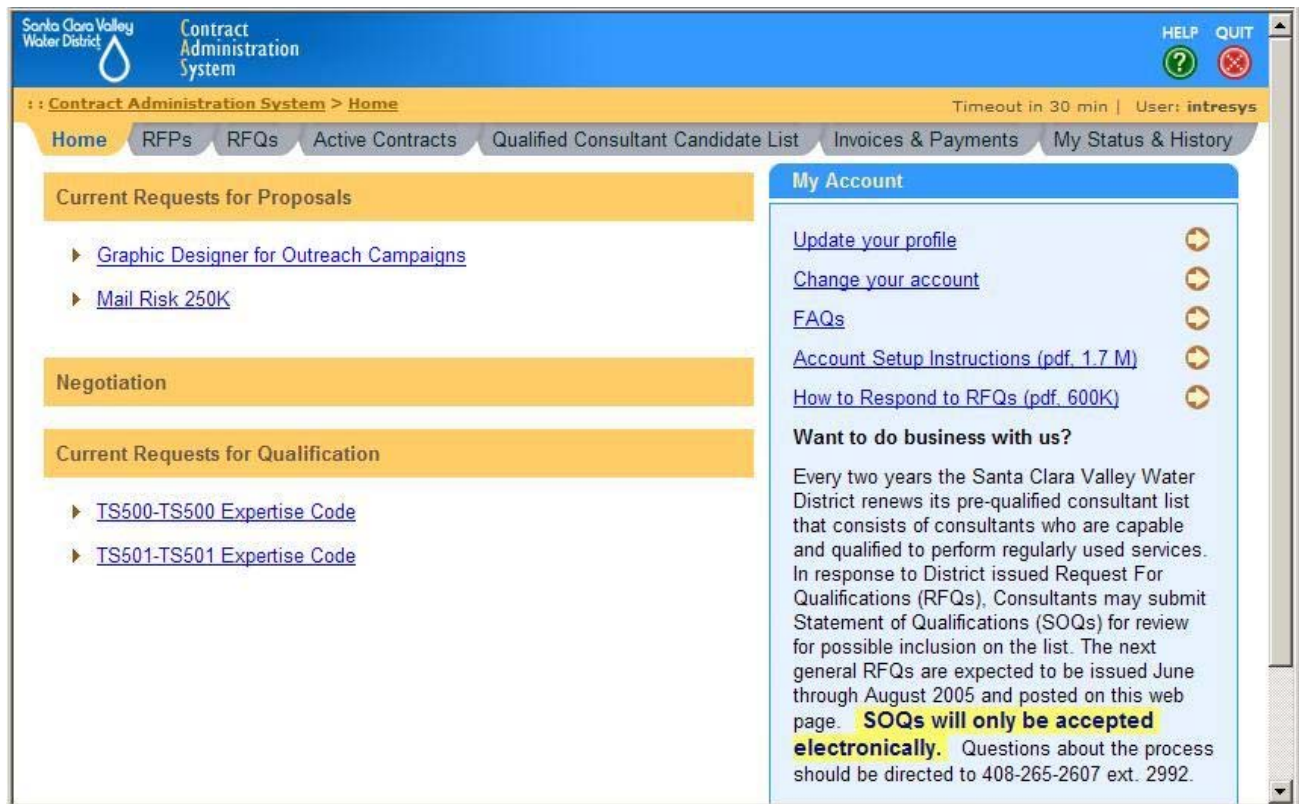
## PART I. View Published RFP

1. Go to <http://cas.valleywater.org> or <https://cas.valleywater.org> for a secure connection, and log in.

If you have not yet created an account, click the link “Create an Account”.

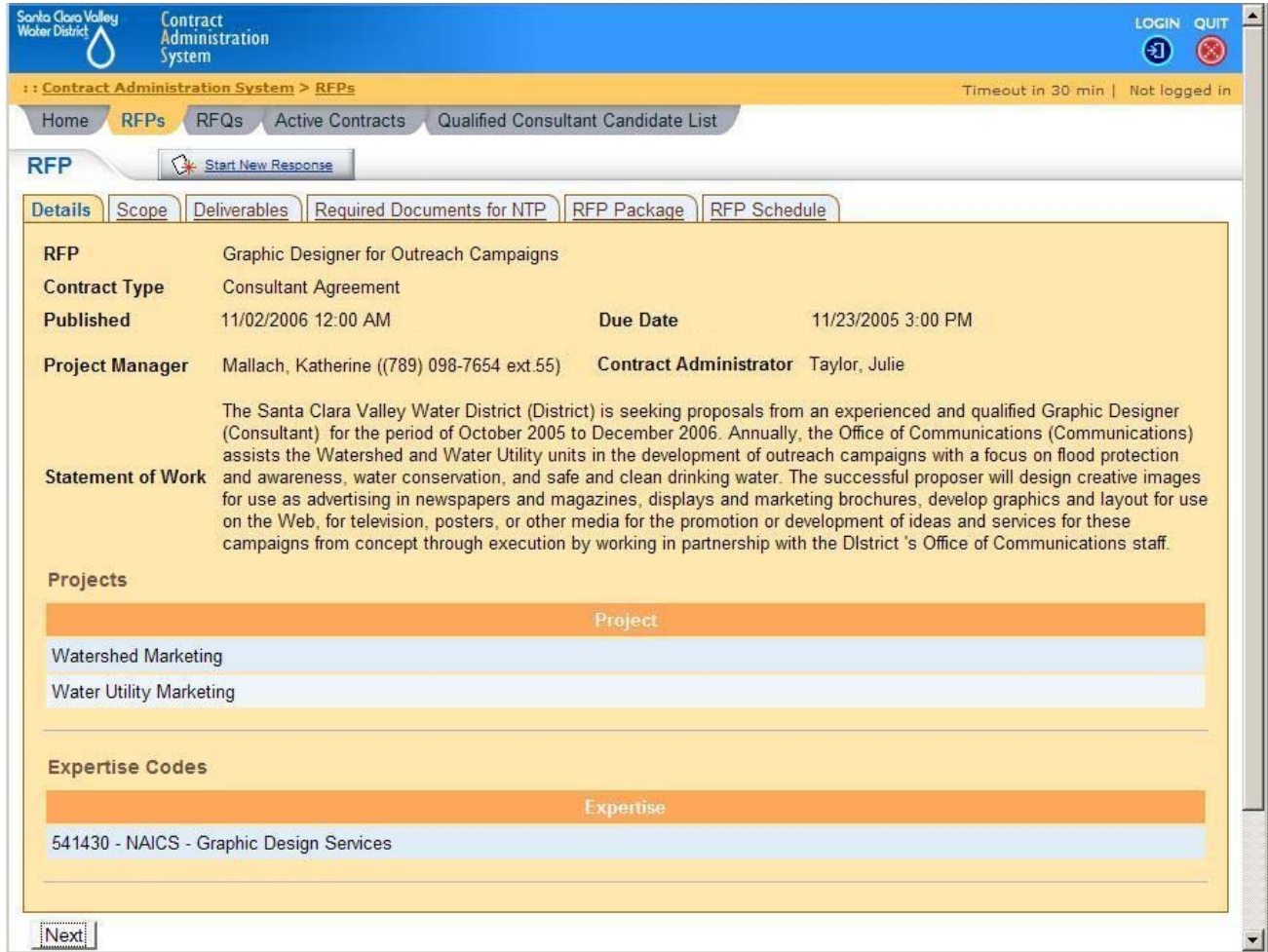
You can also view a document that explains how to create an account by clicking the link “Account Setup Instructions”.

2. Once logged in, the tab “Home” is selected by default.



3. Under the heading “Current Requests for Proposals” you will see all the District’s published RFPs that are either Public or to which your company has specifically been pre-selected to submit a Response to.
4. On the portal’s tab “Home”, click the link to the RFP you want to view.  
You can also find links to these same RFPs by clicking on the tab “RFPs”.

5. On screen is “RFP”



The screenshot shows the 'RFP' details page in the Contract Administration System. The page header includes the Santa Clara Valley Water District logo and the system name. The breadcrumb trail is 'Contract Administration System > RFPs'. The page is titled 'RFP' and has a 'Start New Response' button. The main content area is divided into several tabs: 'Details', 'Scope', 'Deliverables', 'Required Documents for NTP', 'RFP Package', and 'RFP Schedule'. The 'Details' tab is active, showing the following information:

- RFP:** Graphic Designer for Outreach Campaigns
- Contract Type:** Consultant Agreement
- Published:** 11/02/2006 12:00 AM
- Due Date:** 11/23/2005 3:00 PM
- Project Manager:** Mallach, Katherine ((789) 098-7654 ext.55)
- Contract Administrator:** Taylor, Julie

The **Statement of Work** section contains the following text: "The Santa Clara Valley Water District (District) is seeking proposals from an experienced and qualified Graphic Designer (Consultant) for the period of October 2005 to December 2006. Annually, the Office of Communications (Communications) assists the Watershed and Water Utility units in the development of outreach campaigns with a focus on flood protection and awareness, water conservation, and safe and clean drinking water. The successful proposer will design creative images for use as advertising in newspapers and magazines, displays and marketing brochures, develop graphics and layout for use on the Web, for television, posters, or other media for the promotion or development of ideas and services for these campaigns from concept through execution by working in partnership with the District's Office of Communications staff."

The **Projects** section lists two projects: Watershed Marketing and Water Utility Marketing.

The **Expertise Codes** section lists one code: 541430 - NAICS - Graphic Design Services.

At the bottom of the page, there is a 'Next' button.

5.1. Read all the information about the published RFP by clicking on each of the sub-tabs.

5.1.1. Details – Some key fields to focus on include:

5.1.1.1. RFP – The name of the contract

5.1.1.2. Contract Type

5.1.1.3. Due Date – The date/time all responses must be electronically submitted.

5.1.1.4. Contact names (Project Manager, Contract Administrator)

5.1.1.5. Statement of Work

5.1.1.6. Projects – The one or more projects this contract will be associated with.

5.1.1.7. Expertise Codes – The primary expertise code (and sub-expertise codes if any) this contract is related to.

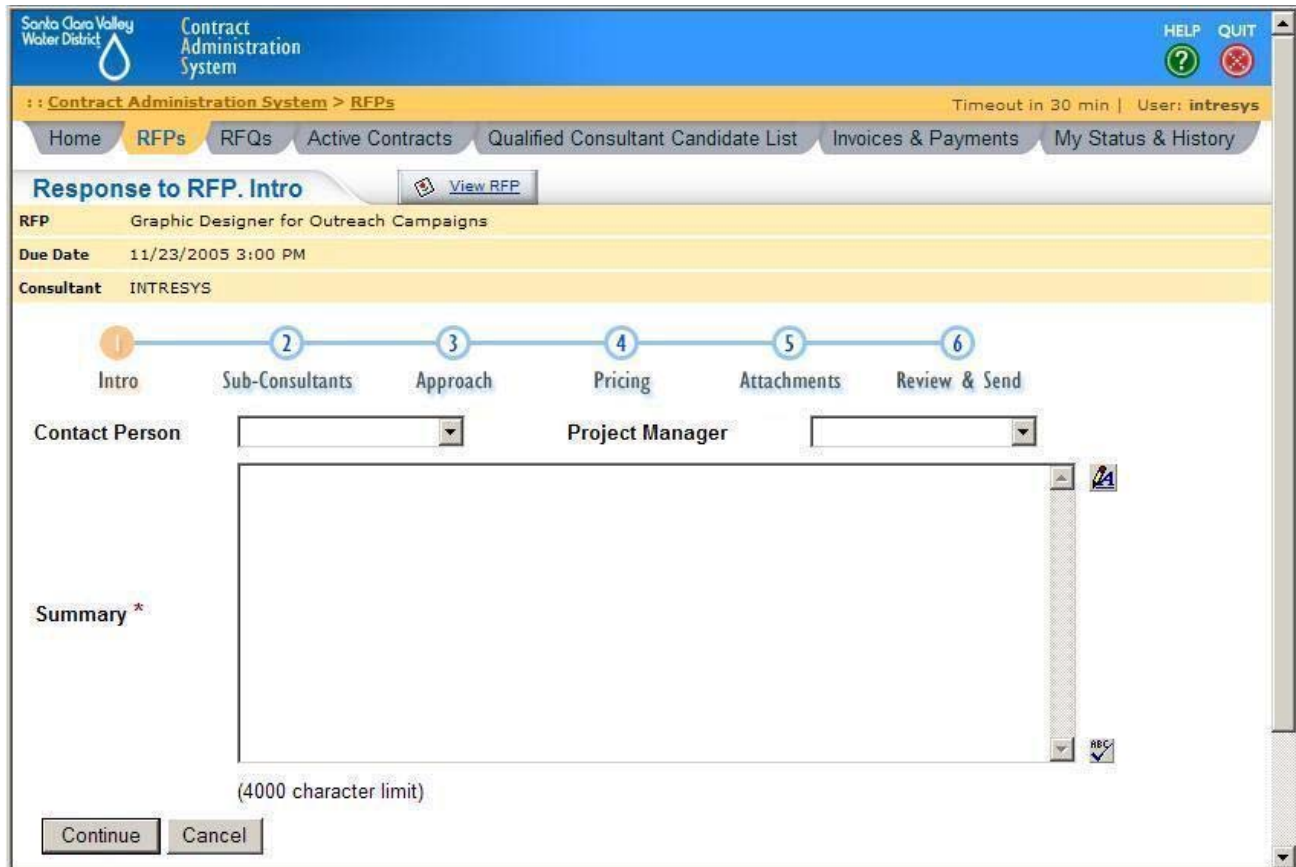
5.1.2. Scope – The Tasks (and Sub-Tasks if any) involved in this contract. Start and End Dates, Units, and Quantity may be specified for the Tasks/Sub-Tasks.



- 5.1.3. Deliverables – A list of any deliverables required as part of the contract.
- 5.1.4. Required Documents for NTP (Notice to Proceed) – If specified at this point, a list of documents that the company awarded the contract will need to provide to the District before the contract can be activated. Examples include proof of insurance, a bond, etc.
- 5.1.5. RFP Package – A list of attached documents from the District providing more details about the contract. Click the link of each document to open and review it.
- 5.1.6. RFP Schedule – If specified, a schedule of activities related to the RFP and award process. Dates may be supplied for each activity.

## PART II. Create New Response

6. To start your Response to an RFP, press the toolbar button “Start New Response” at any time while viewing the RFP information.
7. On screen is “Response to RFP. Intro”



Santa Clara Valley Water District Contract Administration System

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

Response to RFP. Intro View RFP

RFP Graphic Designer for Outreach Campaigns

Due Date 11/23/2005 3:00 PM

Consultant INTRESYS

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

Contact Person [Dropdown] Project Manager [Dropdown]

Summary \*

(4000 character limit)

Continue Cancel


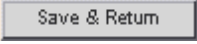

Notice the 6 Steps involved in creating your Response:

- Intro
- Sub-Consultants
- Approach
- Pricing
- Attachments
- Review & Send

## 7.1. Step 1 - Intro

### 7.1.1. Enter a Contact Person and/or Project Manager

7.1.2. Enter text in the field “Summary”. This is the overview of your Response. Later on you will have the ability to attach as many documents (PDFs) as you like as part of your Response.

**TIP:** The box allows up to 4,000 characters, but if the text is too long to fit in the Summary field, click  to open a bigger input window, type the text, then click  to return to the Intro page. To check spelling, click .

**TIP:** You can copy and paste directly into this field.

7.1.3. Press the button “Continue” to move to Step 2 – Sub-Consultants. Your Response is auto-saved in Draft mode.

**TIP:** At any time during your Response if you want to review the information in the RFP, press the toolbar button “View RFP”.

## 7.2. Step 2 – Sub-Consultants

In order to add a consultant as a sub-consultant in your Response, that consultant must first be registered in the CAS web portal. If the consultant you want to add has not yet created an account in the web portal, you can either ask them to do so or you can create the account on their behalf (with their permission).

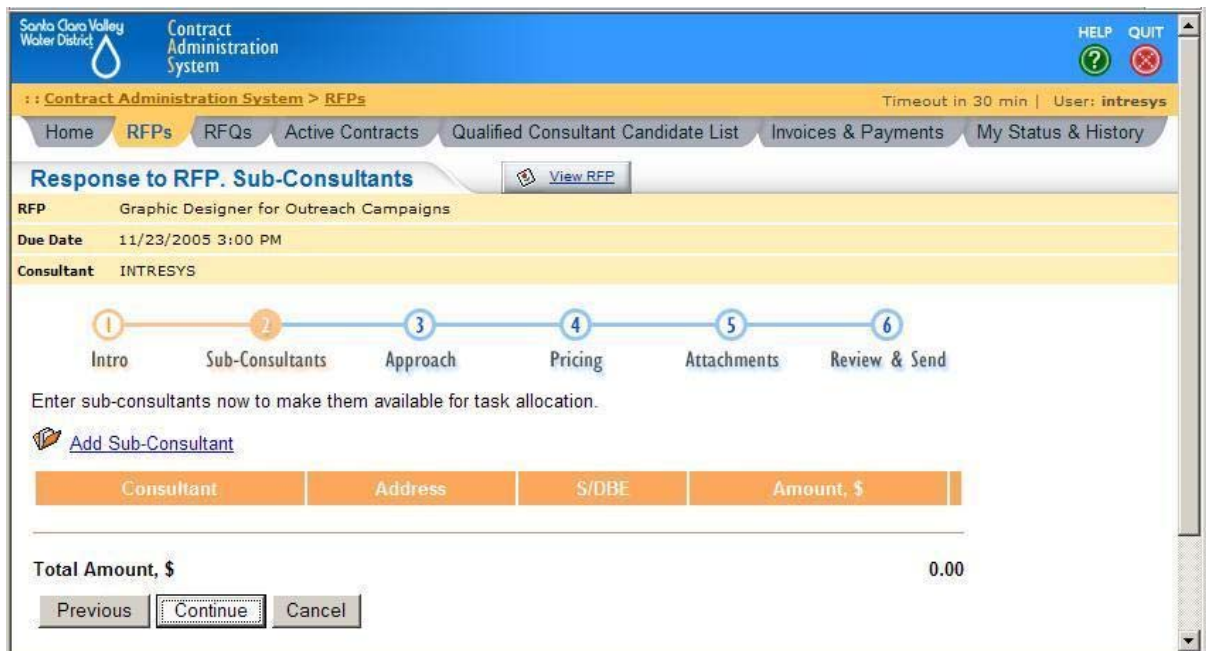
As a reminder, to register in the CAS web portal (create an account), go to the Home page on the CAS portal and click the link “Create an Account”. It only takes a minute.

Note: If you are going to create the account for the consultant and you are currently logged into the portal, you will first have to press the button “Quit” and then start a new session so you can get to the screen with the “Create an Account” link.



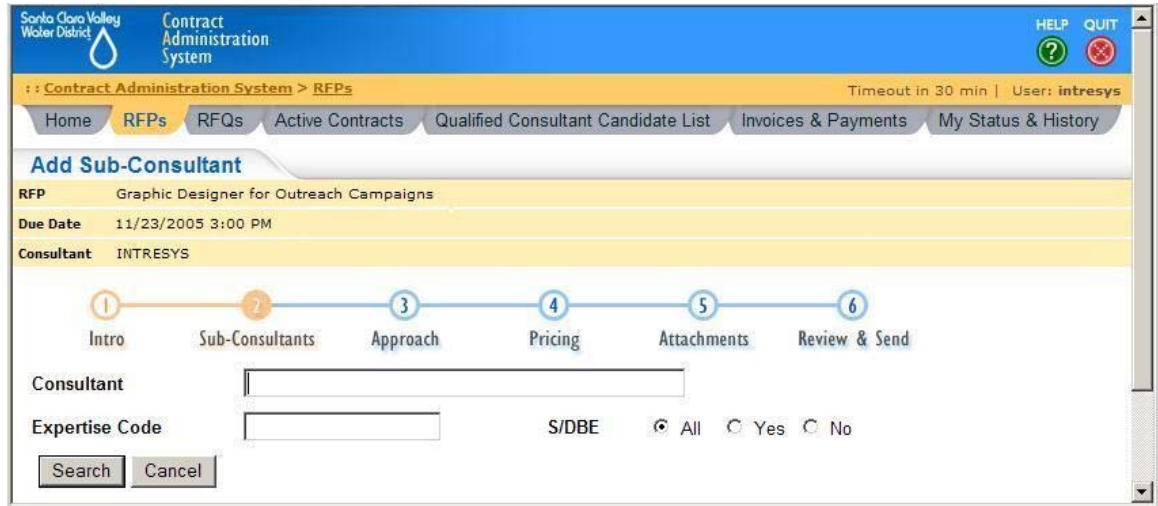
The screenshot shows the 'Contract Administration System' home page. The top navigation bar includes 'Home', 'RFPs', 'RFQs', 'Active Contracts', and 'Qualified Consultant Candidate List'. The main content area is divided into two sections: 'Current Requests for Proposals' and 'Current Requests for Qualification'. The 'Current Requests for Proposals' section lists two items: 'Graphic Designer for Outreach Campaigns' and 'Mail Risk 250K'. The 'Current Requests for Qualification' section lists two items: 'TS500-TS500 Expertise Code' and 'TS501-TS501 Expertise Code'. On the right side, there is a 'My Account' section with a login form containing fields for 'Username' and 'Password', a 'Login' button, and links for 'Create an Account', 'Forgot your username/password?', 'Account Setup Instructions (pdf, 1.7 M)', and 'How to Respond to RFQs (pdf, 600K)'. The top right corner shows 'HELP', 'LOGIN', and 'QUIT' buttons, along with a 'Timeout in 18 min | Not logged in' status.

7.2.1. To add a sub-consultant to your Response, click the link “Add Sub-Consultant”.

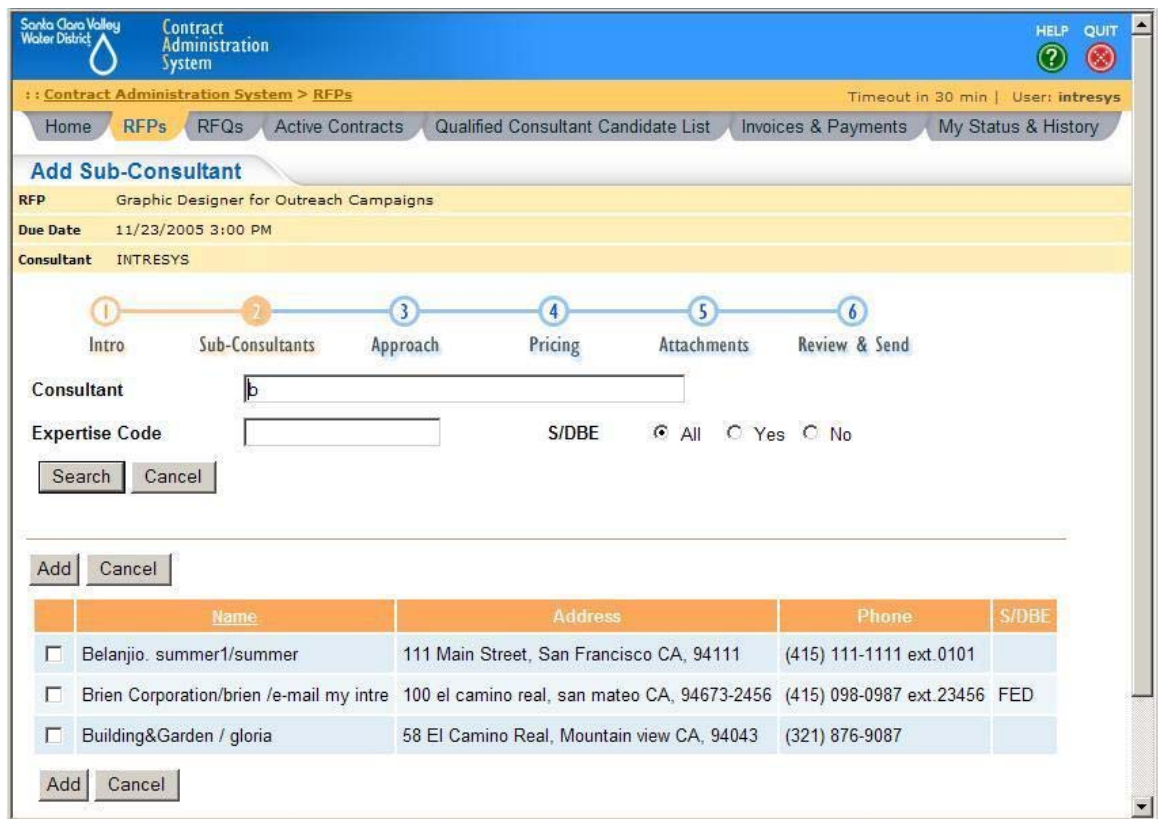


The screenshot shows the 'Response to RFP. Sub-Consultants' page. The top navigation bar includes 'Home', 'RFPs', 'RFQs', 'Active Contracts', 'Qualified Consultant Candidate List', 'Invoices & Payments', and 'My Status & History'. The main content area is titled 'Response to RFP. Sub-Consultants' and includes a 'View RFP' button. Below this, there is a summary of the RFP: 'Graphic Designer for Outreach Campaigns', 'Due Date: 11/23/2005 3:00 PM', and 'Consultant: INTRESYS'. A progress bar shows six steps: 1. Intro, 2. Sub-Consultants (current step), 3. Approach, 4. Pricing, 5. Attachments, and 6. Review & Send. Below the progress bar, there is a text prompt: 'Enter sub-consultants now to make them available for task allocation.' and a link to 'Add Sub-Consultant'. Below this link is a table with the following columns: 'Consultant', 'Address', 'S/DBE', and 'Amount, \$'. The table is currently empty. At the bottom, there is a 'Total Amount, \$' field showing '0.00' and three buttons: 'Previous', 'Continue', and 'Cancel'. The top right corner shows 'HELP', 'QUIT' buttons, a 'Timeout in 30 min' status, and the user 'User: intresys'.

7.2.1.1. On screen is “Add Sub-Consultant”

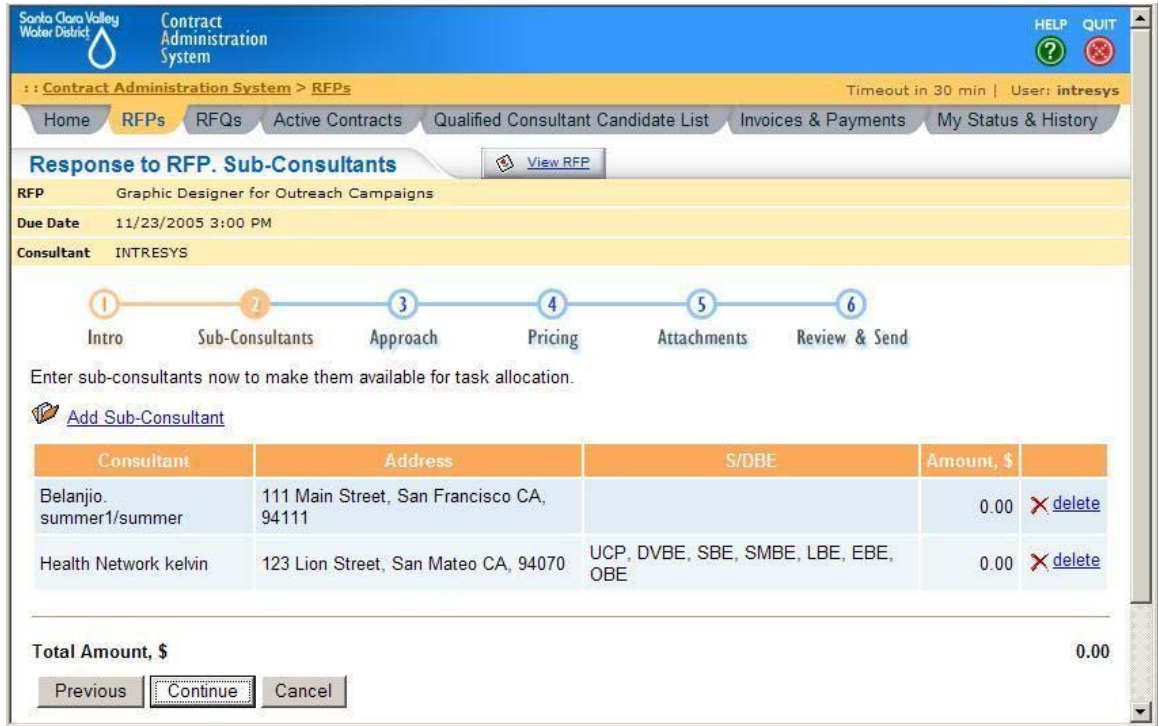


7.2.1.2. Enter the appropriate search criteria and press the button “Search”.



	Name	Address	Phone	S/DBE
<input type="checkbox"/>	Belanjio. summer1/summer	111 Main Street, San Francisco CA, 94111	(415) 111-1111 ext.0101	
<input type="checkbox"/>	Brien Corporation/brien /e-mail my intre	100 el camino real, san mateo CA, 94673-2456	(415) 098-0987 ext.23456	FED
<input type="checkbox"/>	Building&Garden / gloria	58 El Camino Real, Mountain view CA, 94043	(321) 876-9087	

7.2.1.2.1. Check the box next to the consultant(s) you want to add as a sub-consultant to RFPs and press the button “Add”.



Santa Clara Valley Water District Contract Administration System

Contract Administration System > RFPs

Timeout in 30 min | User: intresys

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

**Response to RFP. Sub-Consultants** [View RFP](#)

RFP Graphic Designer for Outreach Campaigns

Due Date 11/23/2005 3:00 PM

Consultant INTRESYS

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

Enter sub-consultants now to make them available for task allocation.

[Add Sub-Consultant](#)

Consultant	Address	S/DBE	Amount, \$	
Belanjio. summer1/summer	111 Main Street, San Francisco CA, 94111		0.00	<a href="#">delete</a>
Health Network kelvin	123 Lion Street, San Mateo CA, 94070	UCP, DVBE, SBE, SMBE, LBE, EBE, OBE	0.00	<a href="#">delete</a>

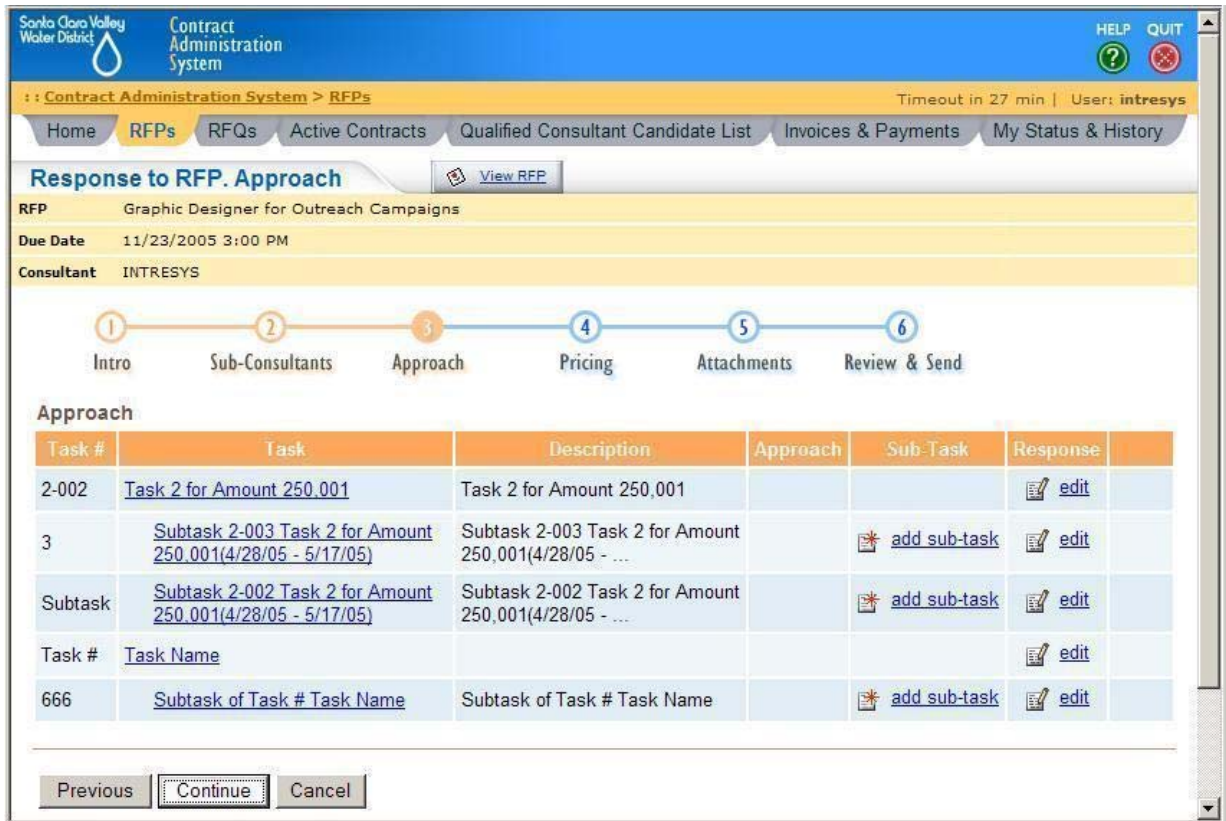
Total Amount, \$ 0.00

[Previous](#) [Continue](#) [Cancel](#)

7.2.2. Repeat step 7.2.1 to add additional sub-consultants.

7.2.3. Press the button “Continue” to move to Step 3 - Approach.

### 7.3. Step 3 - Approach



**Response to RFP. Approach**

RFP: Graphic Designer for Outreach Campaigns  
 Due Date: 11/23/2005 3:00 PM  
 Consultant: INTRESYS

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

Task #	Task	Description	Approach	Sub-Task	Response
2-002	<a href="#">Task 2 for Amount 250.001</a>	Task 2 for Amount 250,001			<a href="#">edit</a>
3	<a href="#">Subtask 2-003 Task 2 for Amount 250.001(4/28/05 - 5/17/05)</a>	Subtask 2-003 Task 2 for Amount 250,001(4/28/05 - ...		<a href="#">add sub-task</a>	<a href="#">edit</a>
Subtask	<a href="#">Subtask 2-002 Task 2 for Amount 250.001(4/28/05 - 5/17/05)</a>	Subtask 2-002 Task 2 for Amount 250,001(4/28/05 - ...		<a href="#">add sub-task</a>	<a href="#">edit</a>
Task #	<a href="#">Task Name</a>				<a href="#">edit</a>
666	<a href="#">Subtask of Task # Task Name</a>	Subtask of Task # Task Name		<a href="#">add sub-task</a>	<a href="#">edit</a>

Buttons: Previous, Continue, Cancel

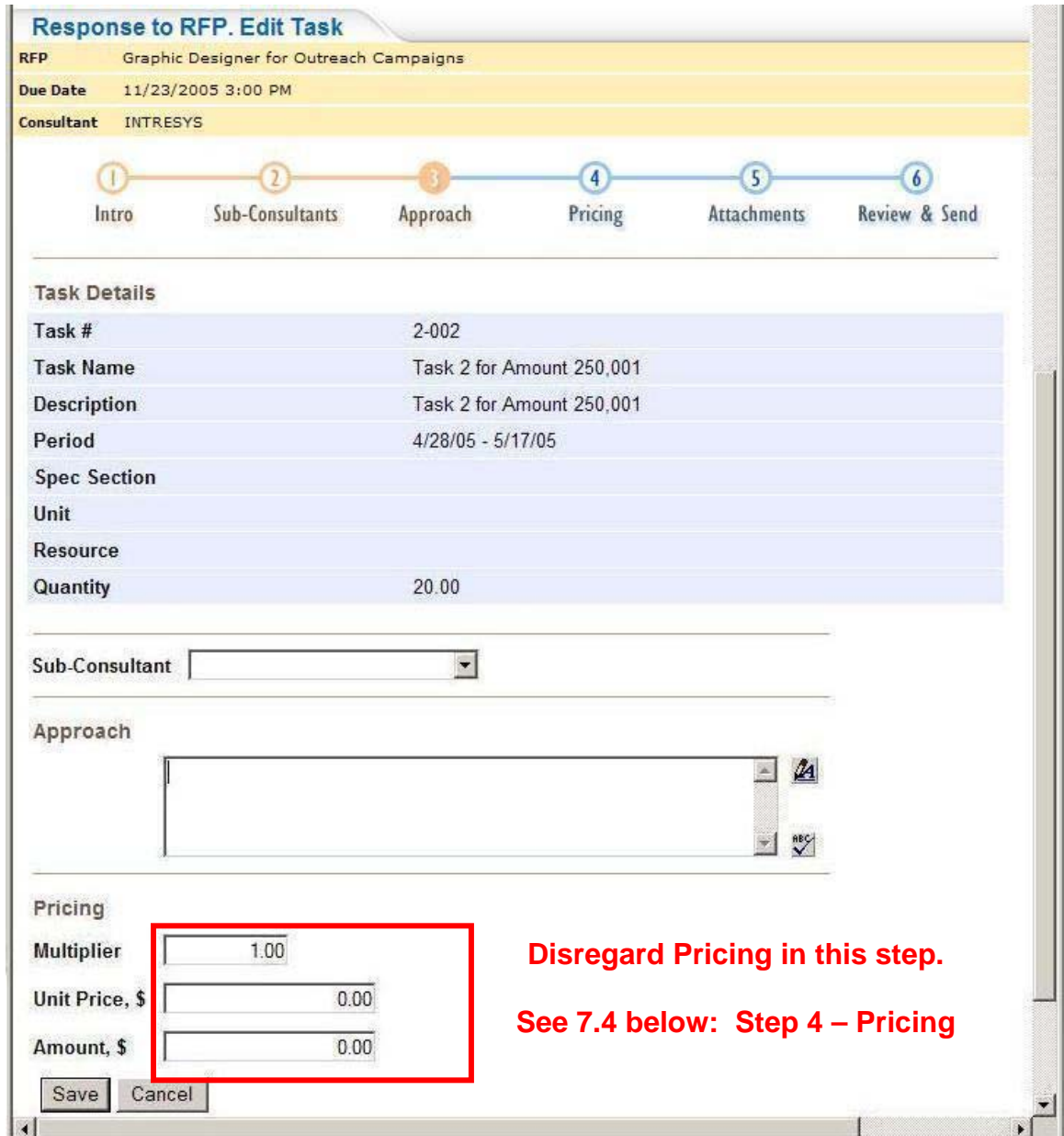
In Steps 3 and 4, Approach and Pricing, you will see the initial Scope as created by the District. Step 3 is where you indicate what your Approach will be to addressing the various Task and Sub-Task items in the Scope. This is also where you indicate if a sub-consultant will perform a particular Task or Sub-Task. You cannot change or delete any of the Scope items the District has included. You can, however, add Sub-Tasks to some of the existing items. After you complete your Approach portion of your Response, you will then move to Pricing where you will provide numbers associated with the Scope items.

You have the option of explaining what your Approach will be for every single Task and Sub-Task listed in the Scope, or selectively enter your Approach to only certain items. For example, if there is a “parent” Task that contains several “children” Sub-Tasks, you could explain your Approach to each of those items or you could list your Approach to just the parent Task, while making sure to address the issues of its children Sub-Tasks in your one explanation.

**NOTE:** The Scope can have any number of levels of Sub-Tasks: 1<sup>st</sup> level (parent), 2<sup>nd</sup> level (child), 3<sup>rd</sup> level (grandchild), 4<sup>th</sup> level (great-grandchild), etc.

7.3.1. To explain your Approach and/or add a sub-consultant to a Task or Sub-Task, either click the link of the task’s name under the “Task” column or click the link “edit” next to it.

7.3.2. On screen is “Response to RFP. Edit Task”



**Response to RFP. Edit Task**

RFP Graphic Designer for Outreach Campaigns

Due Date 11/23/2005 3:00 PM

Consultant INTRESYS

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

**Task Details**

Task #	2-002
Task Name	Task 2 for Amount 250,001
Description	Task 2 for Amount 250,001
Period	4/28/05 - 5/17/05
Spec Section	
Unit	
Resource	
Quantity	20.00

Sub-Consultant

Approach

**Pricing**

Multiplier	<input type="text" value="1.00"/>
Unit Price, \$	<input type="text" value="0.00"/>
Amount, \$	<input type="text" value="0.00"/>

Save Cancel

**Disregard Pricing in this step.**  
**See 7.4 below: Step 4 – Pricing**

## Adding Sub-Consultants

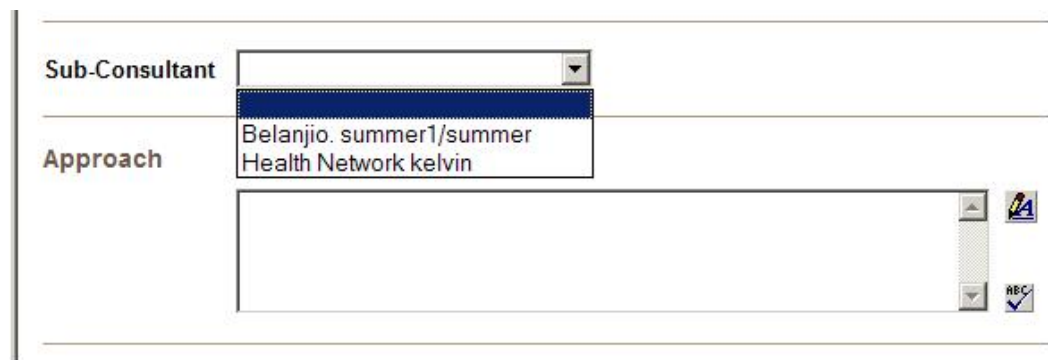
For each Task or Sub-Task, you can indicate if a sub-consultant will perform the task. If no sub-consultant will perform the task and your own company will perform it, then leave the pulldown “Sub-Consultant” blank.

**NOTE:** If you assign a sub-consultant to a “parent” Task, then you **must** assign the same sub-consultant to all its “children” Sub-Tasks. On the other hand, if you do not specify a sub-consultant for the “parent” Task, you then have the option of sourcing its Sub-Tasks individually.

For example, let’s say there is Parent Task 1 with Child Sub-Tasks 1.1, 1.2, and 1.3. For Parent Task 1, if you leave the sub-consultant pulldown blank, then you have the option to assign Sub-Consultant A to Child Sub-Task 1.1, assign Sub-Consultant B to Child Sub-Task 1.2, and assign no sub-consultant to Child Sub-Task 1.3.

As long as the parent Task is not assigned a sub-consultant, you are then free to assign any combination of sub-consultants to its children Sub-Tasks. But once you assign that parent Task a sub-consultant, then all its children Sub-Tasks must have the same sub-consultant.


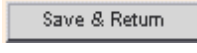

7.3.2.1. To assign a sub-consultant to a particular Task or Sub-Task, select that consultant from the pulldown “Sub-Consultant”.



The screenshot shows a web form with two main sections. The top section is labeled 'Sub-Consultant' and contains a dropdown menu. The dropdown menu is open, showing two options: 'Belanjio. summer1/summer' and 'Health Network kelvin'. The bottom section is labeled 'Approach' and contains a large text input field. To the right of the text input field, there are two small icons: a magnifying glass and a checkmark.

## Entering Your Approach

7.3.2.2. Enter text in the field “Approach”.

**TIP:** If the text is too long to fit in the field, click  to open a bigger input window, type the text, then click  to return to the previous page. To check spelling, click .

**TIP:** You can copy and paste directly into this field.

**NOTE:** At the bottom of the screen you will see fields for Pricing. Disregard these fields at this time. There are rules for the relationship between a Task and its Sub-Tasks’ \$ Amounts that you will deal with in Step 4 – Pricing.

7.3.2.3. Press the button “Save”. You will be returned to the Approach screen that shows the entire Scope.

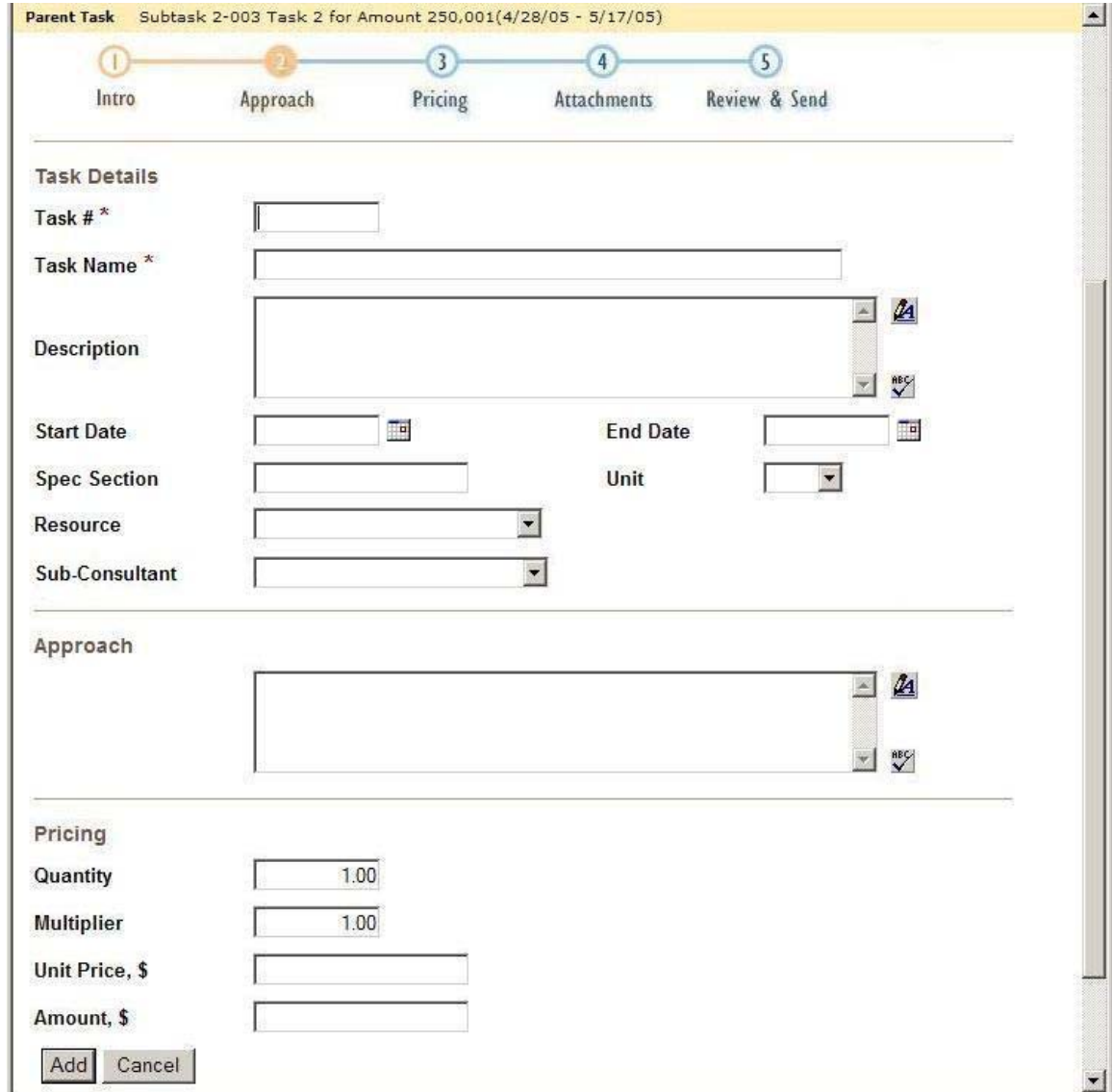
## Adding Sub-Tasks

While you cannot change or delete the District’s existing Scope items at this point, and you cannot add your own 1<sup>st</sup> level (parent) Tasks, you CAN add Sub-Tasks to existing Scope items. (Later on if you are selected for negotiation, the entire Scope will be open for revision.)

If any of the District’s existing Scope items already have Sub-Tasks, then you cannot add additional Sub-Tasks to that particular item. However, you can add Sub-Tasks to any item at any level that does not currently have its own Sub-Tasks.

7.3.3. Click the link “add sub-task” for the Scope item that you want to add the Sub-Task to.

7.3.4. On screen is “Response to RFP. Create Task”.



At the top of the screen you will see the name of the Parent Task you are adding this Sub-Task to.

7.3.4.1. Fill out the appropriate fields. Fields with an asterisk (\*) are required.

7.3.4.1.1. Task # – Used to define the order of the Tasks and Sub-Tasks. Any value can be entered (1, 1a, 1.1, A1, 2, etc.). Each level of task auto-sorts based on the value entered. (Example: If these are all top-level Tasks, they would auto-sort in the following order: 1, 1.1, 1a, 2, A1).

7.3.4.1.2. Spec. Section – A technical reference, if appropriate. For example, in a construction project it could be a technical specification reference.

7.3.4.1.3. Unit – Indicate how the task will be measured

- DAY – Pay by day, per deim
- EACH – Pay by each item furnished
- FOOT – Pay by lineal foot
- HRS – Personnel hours
- JOB – Lump sum contract
- MONTH – Pay by month
- PAGE – Per page price
- SHEET – Per sheet price
- TSK – Lump sum task
- UNIT – Miscellaneous unit
- YEAR – Yearly price. Use for rate escalator.

7.3.4.1.4. Resource – Specify which of your resources will be used for this task,  
OR

7.3.4.1.5. Sub-Consultant – Specify the sub-consultant you will use for this task.

7.3.4.1.6. Approach – Enter your approach to addressing this task.

7.3.4.1.7. Pricing – Skip the pricing fields until Step 4 – Pricing.

7.3.4.2. When finished, press the button “Save”. You will be returned to the  
Approach screen with the entire Scope including your new Sub-Task.

7.3.5. To add more Sub-Tasks, repeat steps 7.3.3 and 7.3.4.

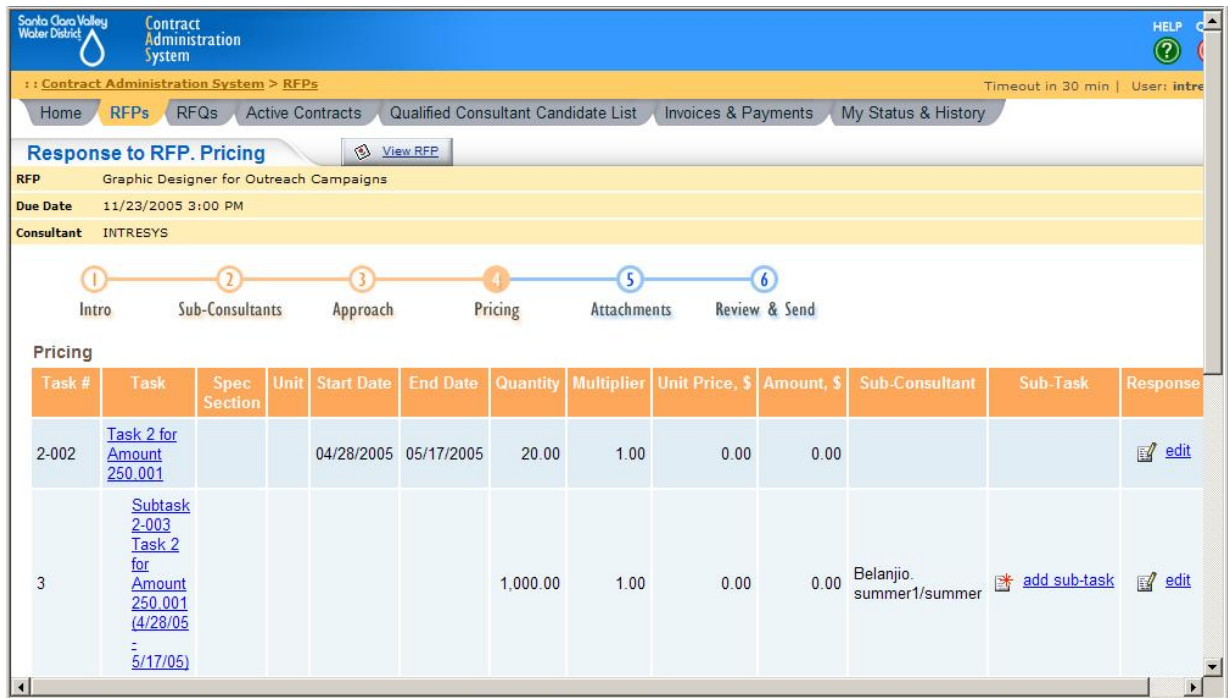
**NOTE:** You can delete any Sub-Tasks that you created by pressing the link “delete” next to its name in the Scope. Be aware that if you created a Sub-Task and then created children for it (Sub-Sub-Tasks), if you delete the higher level Sub-Task, all its children will also be deleted.

7.3.6. Press the button “Continue” to move to Step 4 – Pricing.

#### 7.4. Step 4 – Pricing

In Step 4 – Pricing, the functionality is almost identical to Step 3 - Approach. To edit an item, click the link of its name or the link “edit”. You can even add Sub-Tasks, just like in Step 3 - Approach. The key difference is that on the Pricing screen, instead of seeing the column “Approach”, you will see several columns with the details of the tasks, such as Unit, Quantity, Multiplier, Unit Price, and Amount.

Furthermore, there are rules for the relationship between a Task and its Sub-Tasks’ \$ Amounts. The Pricing screen shows you when there is a discrepancy between a parent Task and its children Sub-Tasks’ dollar amounts and gives you a quick way to resolve the differences.



Task #	Task	Spec Section	Unit	Start Date	End Date	Quantity	Multiplier	Unit Price, \$	Amount, \$	Sub-Consultant	Sub-Task	Response
2-002	<a href="#">Task 2 for Amount 250.001</a>			04/28/2005	05/17/2005	20.00	1.00	0.00	0.00			<a href="#">edit</a>
3	<a href="#">Subtask 2-003 Task 2 for Amount 250.001 (4/28/05 - 5/17/05)</a>					1,000.00	1.00	0.00	0.00	Belanjio. summer1/summer	<a href="#">add sub-task</a>	<a href="#">edit</a>

## Rules for Pricing

- If you have a top level Task with no children (Sub-Tasks), then you should enter the pricing numbers directly for that top level Task.
- If a Task has Sub-Tasks (children), then the sum of those Sub-Tasks' \$ Amount determines the parent Task's final \$ Amount. In this situation, you must enter the pricing information for the Sub-Tasks, not the parent Task.

Example: Parent Task 1 has two children, Sub-Task 1A and Sub-Task 1B.

Suppose you entered pricing information for the two Sub-Tasks, where Sub-Task 1A totaled \$20,000 and Sub-Task 1B totaled \$12,500. That would mean that the parent Task 1 should equal \$32,500 (\$20,000 + \$12,500). When you return to the Scope screen, there will be a button that lets you auto-calculate parent Task 1's dollar amount so that it equals the sum of its children (\$32,500).

7.4.1. To insert your Pricing numbers for a Task or Sub-Task, either click the link of its name under the "Task" column or click the link "edit" next to it.

7.4.2. On screen is "Response to RFP. Edit Task" (screenshot shows bottom of screen)



7.4.2.1. Enter your pricing numbers:

7.4.2.1.1. Multiplier – By default this is set to 1.

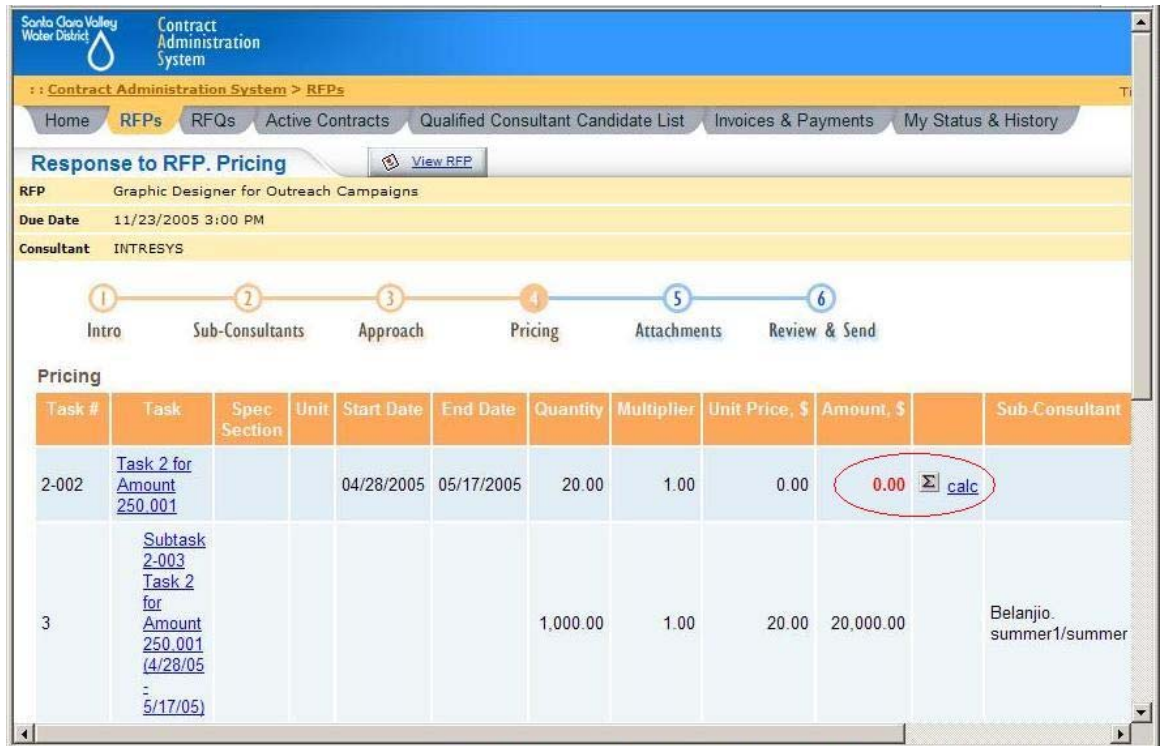
7.4.2.1.2. Unit Price, \$ – This dollar amount will be multiplied by the Quantity specified for the task to create a total \$ Amount.

7.4.2.1.3. Amount, \$ - This field is auto-calculated (Quantity \* Multiplier \* Unit Price) and should not be manually edited.

**NOTE:** If you are entering pricing information for a Sub-Task that you created, there will be one additional field to fill out, Quantity. If you are entering pricing information for a Task/Sub-Task created by the District, then you

cannot modify the Quantity number they assigned to the item. (If you are selected for negotiations, the Scope is fully editable and quantities can be modified.)

7.4.2.2. When finished, press the button “Save”. You will be returned to the Approach screen with the entire Scope showing your new Pricing information.



**NOTE:** If you entered pricing for a Sub-Task, when you return to the Scope screen you will see that its parent Task now has a “calc” button next to it. This is what you will use to auto-calculate the parent Task’s dollar amount based on the sum of its children Sub-Tasks.

**TIP:** If the parent Task has only one Sub-Task, then you should press the “calc” button now. However, if the parent Task has more than one Sub-Task, then wait to finish entering the pricing information for all its Sub-Tasks before pressing the parent Task’s “calc” button.

7.4.3. If the “calc” button appears, once you have finished inputting the pricing info for all that Tasks’ children Sub-Tasks, press the “calc” button. The system will automatically recalculate the parent Tasks’ financial numbers.

Pricing										
Task #	Task	Spec Section	Unit	Start Date	End Date	Quantity	Multiplier	Unit Price, \$	Amount, \$	Sub-Consultant
2-002	<a href="#">Task 2 for Amount 250.001</a>			04/28/2005	05/17/2005	20.00	1.00	1,625.00	32,500.00	
3	<a href="#">Subtask 2-003 Task 2 for Amount 250.001 (4/28/05 - 5/17/05)</a>					1,000.00	1.00	20.00	20,000.00	Belanjio. summer1/summe
Subtask	<a href="#">Subtask 2-002 Task 2 for Amount 250.001 (4/28/05 - 5/17/05)</a>					10.00	1.00	1,250.00	12,500.00	Health Network kelvin

**NOTE:** Anytime the “calc” button appears, it means that a parent Task needs to be auto-calculated based on its children Sub-Tasks’ new pricing information. This is true when entering pricing info for a Sub-Task for the first time, but this also happens if you edit the existing pricing info for a Sub-Task.

In our example above where the two Sub-Tasks totaled \$32,500 for the parent, if you went back and edited the pricing info for the second Sub-Task, changing it from \$12,500 to \$15,000, when you return to the Scope screen, you would see that the parent Task needs to be re-calculated.

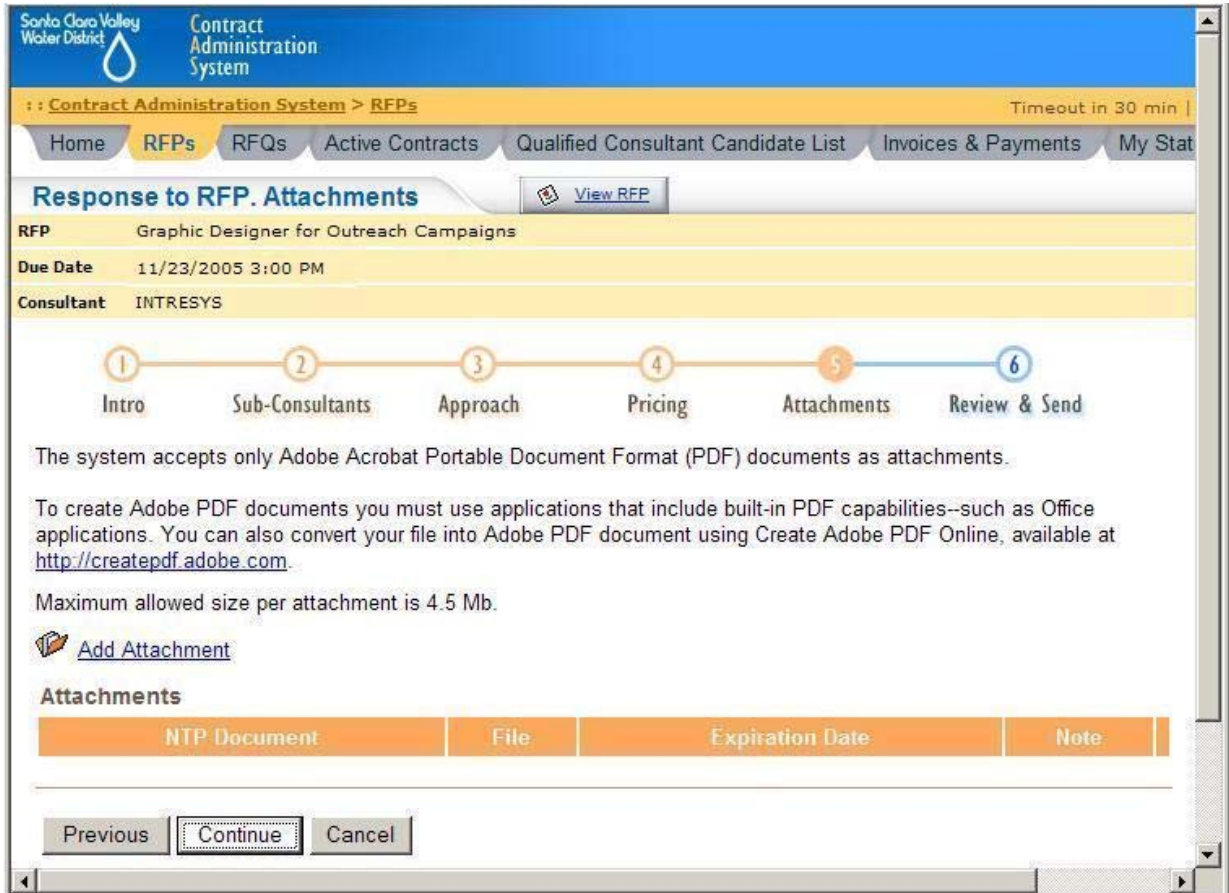
Task #	Task	Spec Section	Unit	Start Date	End Date	Quantity	Multiplier	Unit Price, \$	Amount, \$		Sub-Consultant
2-002	<a href="#">Task 2 for Amount 250.001</a>			04/28/2005	05/17/2005	20.00	1.00	1,625.00	32,500.00	Σ calc	
3	<a href="#">Subtask 2-003 Task 2 for Amount 250.001 (4/28/05 - 5/17/05)</a>					1,000.00	1.00	20.00	20,000.00		Belanjio. summer1/summe
Subtask	<a href="#">Subtask 2-002 Task 2 for Amount 250.001 (4/28/05 - 5/17/05)</a>					10.00	1.00	1,500.00	15,000.00		Health Network kelvin

7.4.4. Press the button “Continue” to move to Step 5 - Attachments.

#### 7.5. Step 5 - Attachments

As part of your Response, you can add any number of attachments. The two key things to note regarding attachments is:

- (1) they must be in Adobe Acrobat PDF format, and
- (2) there is a maximum size per attachment (the size limit is displayed on screen).



The screenshot shows the 'Contract Administration System' web portal. The page title is 'Response to RFP. Attachments'. The breadcrumb trail is 'Contract Administration System > RFPs'. The page includes a navigation menu with 'Home', 'RFPs', 'RFQs', 'Active Contracts', 'Qualified Consultant Candidate List', 'Invoices & Payments', and 'My Stat'. The main content area displays the following information:

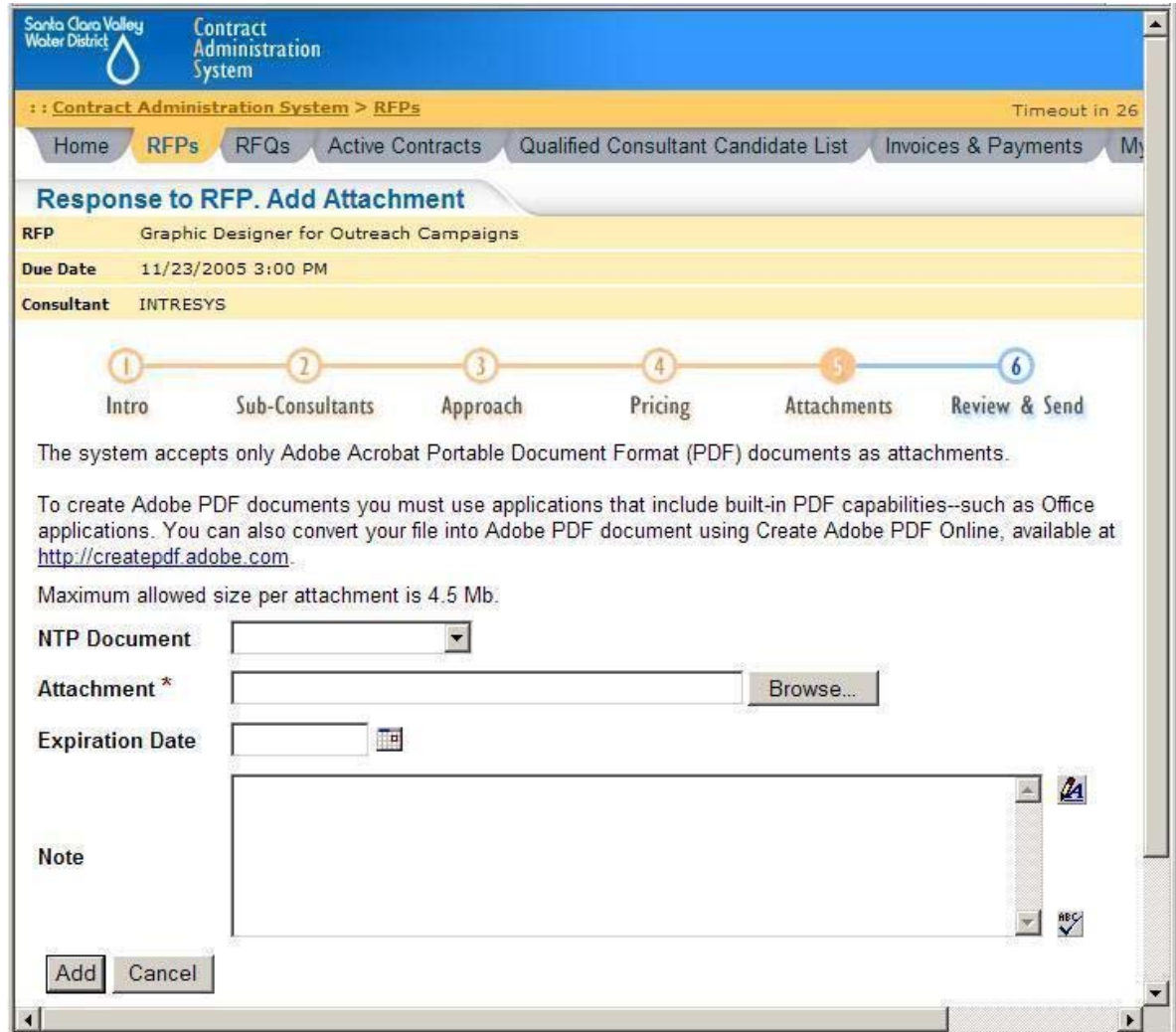
- RFP:** Graphic Designer for Outreach Campaigns
- Due Date:** 11/23/2005 3:00 PM
- Consultant:** INTRESYS

A progress bar shows six steps: 1. Intro, 2. Sub-Consultants, 3. Approach, 4. Pricing, 5. Attachments (highlighted), and 6. Review & Send. Below the progress bar, the text states: 'The system accepts only Adobe Acrobat Portable Document Format (PDF) documents as attachments. To create Adobe PDF documents you must use applications that include built-in PDF capabilities--such as Office applications. You can also convert your file into Adobe PDF document using Create Adobe PDF Online, available at <http://createpdf.adobe.com>. Maximum allowed size per attachment is 4.5 Mb.' There is an 'Add Attachment' button with a paperclip icon. Below this is a table with the following columns: 'NTP Document', 'File', 'Expiration Date', and 'Note'. At the bottom of the page are 'Previous', 'Continue', and 'Cancel' buttons.

If you have documents that need to be converted into PDF format and do not have any existing capability to do the conversion, click the Adobe link on the screen and follow the instructions.

7.5.1. To add a PDF attachment, click the link “Add Attachment”.

## 7.5.2. On screen is “Respond to RFP. Add Attachment”.



The screenshot shows a web application interface for the Contract Administration System. The header includes the Santa Clara Valley Water District logo and the system name. A navigation menu contains links for Home, RFPs, RFQs, Active Contracts, Qualified Consultant Candidate List, Invoices & Payments, and My. The main content area is titled "Response to RFP. Add Attachment" and displays details for a specific RFP: "Graphic Designer for Outreach Campaigns", with a due date of 11/23/2005 3:00 PM and consultant INTRESYS. A progress bar shows six steps: 1. Intro, 2. Sub-Consultants, 3. Approach, 4. Pricing, 5. Attachments (highlighted), and 6. Review & Send. Below the progress bar, instructions state that only Adobe Acrobat PDF documents are accepted as attachments, with a maximum size of 4.5 Mb. A link is provided for creating PDFs online. The form includes a dropdown for "NTP Document", a "Browse..." button for the "Attachment\*" field, an "Expiration Date" field with a calendar icon, and a large "Note" text area. "Add" and "Cancel" buttons are at the bottom.

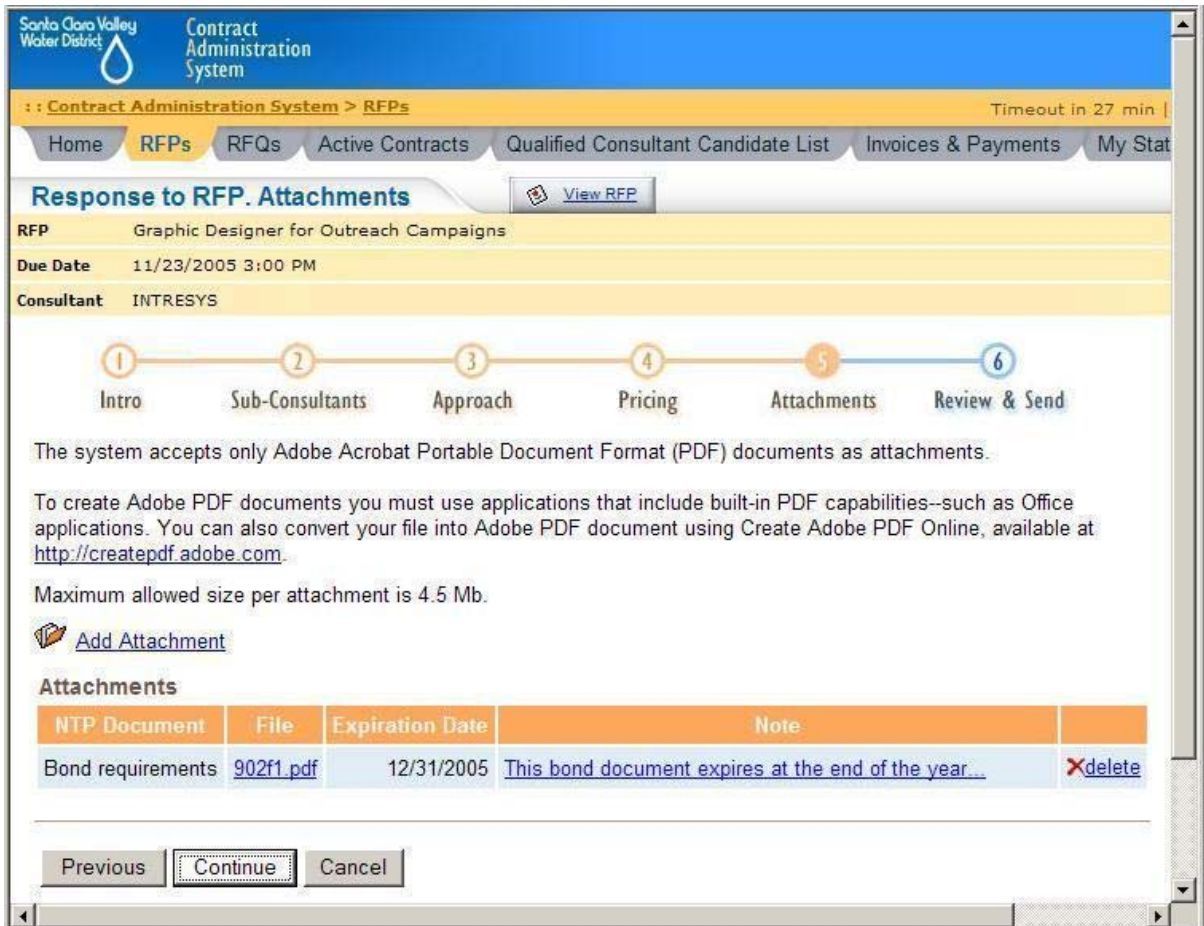
- 7.5.2.1. If the attachment you are adding in is response to a District requested NTP Document, such as a proof of insurance, then select the corresponding item from the pulldown “NTP Document”. If you are simply attaching a document as part of your Response, leave the NTP Document pulldown blank.
- 7.5.2.2. Press the button “Browse” to open the Choose File dialog box and navigate to where you have your document stored (it could be on your hard drive, network drive, or any other media). Select the file and press the button “Open”.
- 7.5.2.3. Expiration Date – If appropriate, enter an expiration date for your attachment. This could be relevant, for example, if your proof of insurance document is only good through the end of the year.

7.5.2.4. Note – Enter any note text if appropriate.

7.5.2.5. When finished, press the button “Add”.

7.5.3. To add more attachments, repeat Steps 7.5.1 and 7.5.2.

### Deleting Attachments



Santa Clara Valley Water District Contract Administration System

Contract Administration System > RFPs Timeout in 27 min

Home RFPs RFQs Active Contracts Qualified Consultant Candidate List Invoices & Payments My Stat

**Response to RFP. Attachments** [View RFP](#)

RFP Graphic Designer for Outreach Campaigns

Due Date 11/23/2005 3:00 PM

Consultant INTRESYS

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

The system accepts only Adobe Acrobat Portable Document Format (PDF) documents as attachments.

To create Adobe PDF documents you must use applications that include built-in PDF capabilities--such as Office applications. You can also convert your file into Adobe PDF document using Create Adobe PDF Online, available at <http://createpdf.adobe.com>.

Maximum allowed size per attachment is 4.5 Mb.

[Add Attachment](#)

NTP Document	File	Expiration Date	Note	
Bond requirements	<a href="#">902f1.pdf</a>	12/31/2005	This bond document expires at the end of the year...	<a href="#">Xdelete</a>

Previous **Continue** Cancel

7.5.4. To delete one of your attachments, simple click the link “delete” next to the attachment. Press “OK” to the confirmation box that appears.

7.5.5. Press the button “Continue” to move to Step 6 – Review & Send.

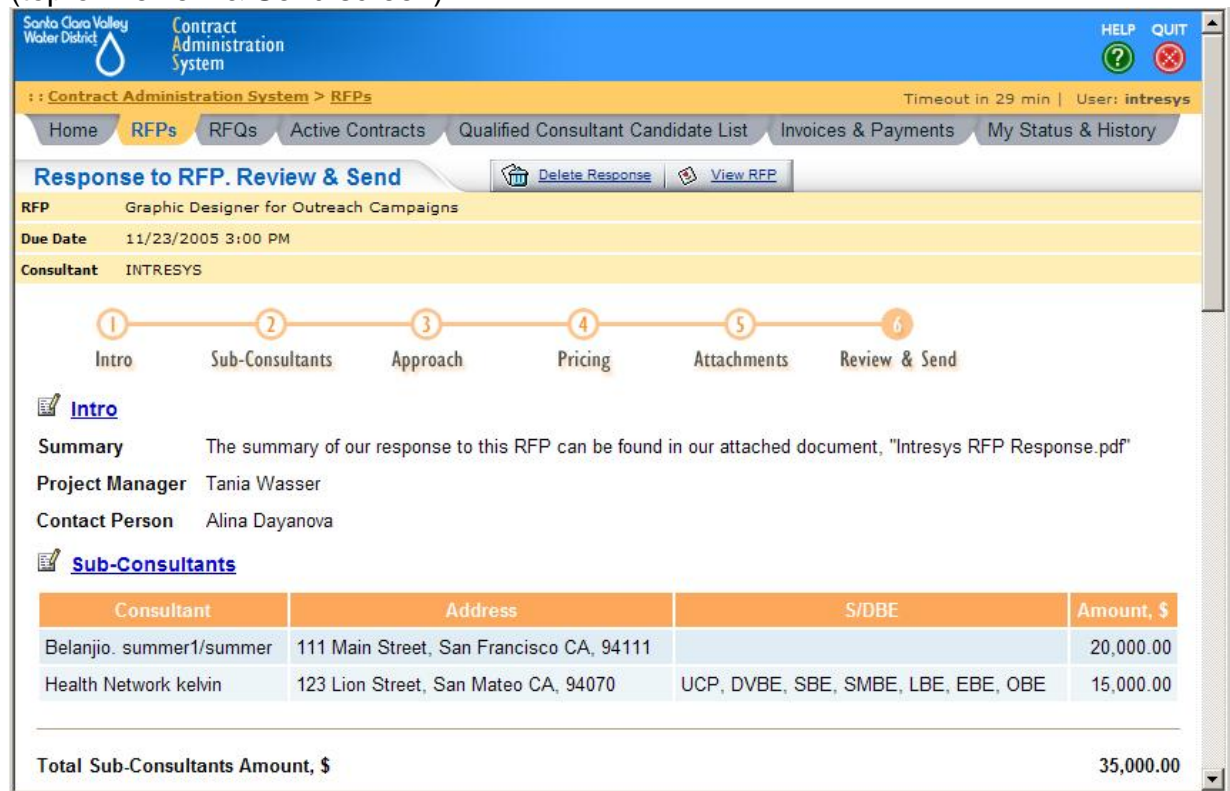
## 7.6. Step 6 – Review & Send

In this final step, you will review all the details of your Response. When you are ready, you will electronically submit your Response to the District. Keep in mind that you must submit your Response prior to the Due Date & Time. If you have not submitted your Response before the Due Date & Time passes, when you click on your Draft Response, the Edit and Submit buttons will no longer be available.

**TIP:** If you do not want to send your Response right away, or you are not able to complete all the steps in one session, do not click the button “Send”. Your Response will be stored in Draft status and you can edit and send it later.

**NOTE:** After you have submitted your Response, if the Response Due Date & Time has not yet expired, you have the option to Withdraw your Response (see Part IV below). You can either keep your Response withdrawn or make further edits to it and then re-submit (see Part III below), but **only if the Response Due Date & Time has not expired**.

(top of Review & Send screen)



Contract Administration System > RFPs

Timeout in 29 min | User: intresys

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

**Response to RFP. Review & Send** [Delete Response](#) [View RFP](#)

RFP Graphic Designer for Outreach Campaigns

Due Date 11/23/2005 3:00 PM

Consultant INTRESYS

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

**Intro**

**Summary** The summary of our response to this RFP can be found in our attached document, "Intresys RFP Response.pdf"

**Project Manager** Tania Wasser

**Contact Person** Alina Dayanova

**Sub-Consultants**

Consultant	Address	S/DBE	Amount, \$
Belanjio. summer1/summer	111 Main Street, San Francisco CA, 94111		20,000.00
Health Network kelvin	123 Lion Street, San Mateo CA, 94070	UCP, DVBE, SBE, SMBE, LBE, EBE, OBE	15,000.00
<b>Total Sub-Consultants Amount, \$</b>			<b>35,000.00</b>

(bottom of Review & Send screen)

**Approach**

Task #	Task	Description	Approach	
2-002	Task 2 for Amount 250,001	Task 2 for Amount 250,001	For this task, we will utilize two sub-consultant ...	<a href="#">view</a>
3	Subtask 2-003 Task 2 for Amount 250,001(4/28/05 - 5/17/05)	Subtask 2-003 Task 2 for Amount 250,001(4/28/05 - ...	We will oversee the work of our sub-consultant, B ...	<a href="#">view</a>
Subtask	Subtask 2-002 Task 2 for Amount 250,001(4/28/05 - 5/17/05)	Subtask 2-002 Task 2 for Amount 250,001(4/28/05 - ...	We will oversee the work of our sub-consultant, H ...	<a href="#">view</a>
Task #	Task Name			
666	Subtask of Task # Task Name	Subtask of Task # Task Name		<a href="#">view</a>

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**Pricing**

Task #	Task	Spec Section	Unit	Start Date	End Date	Quantity	Multiplier	Unit Price, \$	Amount, \$
2-002	Task 2 for Amount 250,001			04/28/2005	05/17/2005	20.00	1.00	1,750.00	35,000.00
3	Subtask 2-003 Task 2 for Amount 250,001(4/28/05 - 5/17/05)					1,000.00	1.00	20.00	20,000.00
Subtask	Subtask 2-002 Task 2 for Amount 250,001(4/28/05 - 5/17/05)					10.00	1.00	1,500.00	15,000.00
Task #	Task Name					1.00	1.00	0.00	0.00
666	Subtask of Task # Task Name		LS			1.00	1.00	0.00	0.00

**Total Amount, \$** 35,000.00

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**Attachments**

NTP Document	File	Expiration Date	Note
	<a href="#">980c1.pdf</a>	12/31/2005	<a href="#">This bond document expires at the end of the year...</a>

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- 7.6.1. To go back and edit any of the previous steps, you can click the button “Previous” until you reach the step you want to edit, or simply click the link of the name of the step you want to edit.
- 7.6.2. When you are ready to submit your Response, press the button “Submit Response”. You will be taken to the “View RFP Response” screen where you can see that the status of the Response has been changed to “Submitted”. You can also see the date/time of your submittal.



### PART III. Edit/Submit Response

8. Click on the tab "RFPs"

8.1. Under the heading "My Responses to RFP", click the link of the RFP Response you want to review/edit.

8.2. On screen is "View RFP Response"



8.2.1. If you just want to submit your Response as it is, press the toolbar button "Submit Response".

OR

8.2.2. If you want to edit your Response, press the toolbar button "Edit Response".

8.2.2.1. You will be taken to the screen "Response to RFP. Intro". If you need to get to any of the other Steps, press the button "Continue".



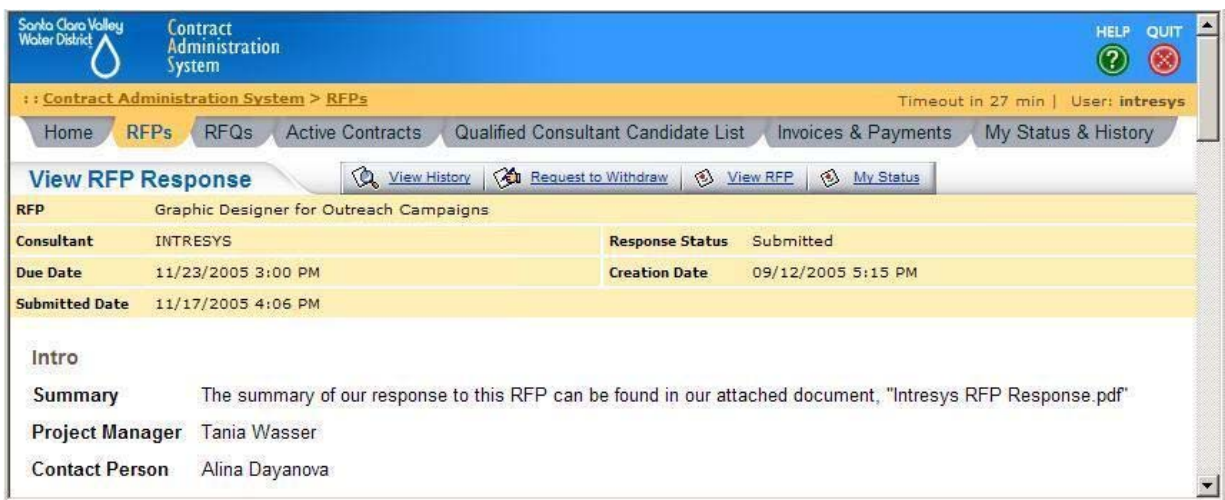
Optionally, from the “View RFP Response” screen, you can click on the link of the Step you want to edit and you will be taken directly to that Step for editing.

8.2.2.2. Once you have finished your edits and are ready to submit your Response, press the button “Continue” until you get to the screen “Review & Send” and then press the button “Submit Response”. If you are not yet ready to submit your Response, you can simply log out or go to another part of the Web portal. Your Response is always automatically saved with your most recent changes.

## PART IV. Withdraw Response

If you already submitted your Response and decide that you want to withdraw it for any reason, you can do so provided the Response Due Date & Time has not passed.

1. Click on the tab “RFPs”
  - 1.1. Under the heading “My Responses to RFP”, click the link of the RFP Response you want to withdraw. Its status will be “Submitted”
  - 1.2. On screen is “View RFP Response”, however, the toolbar buttons Edit, Submit, and Delete are no longer available. A new toolbar button appears, “Request to Withdraw”.



- 1.2.1. Press the toolbar button “Request to Withdraw”. Press “OK” to the confirmation pop up that appears.
  - 1.2.1.1. Your Response’s status is changed from “Submitted” to “Requested to Revoke”. The District will need to “ok” your request. Once the District approves your request, your Response’s status will automatically be changed to “Revoked”. At that point, you can return to the Response, edit it and re-submit it, provided the Response Due Date & Time has not passed.