

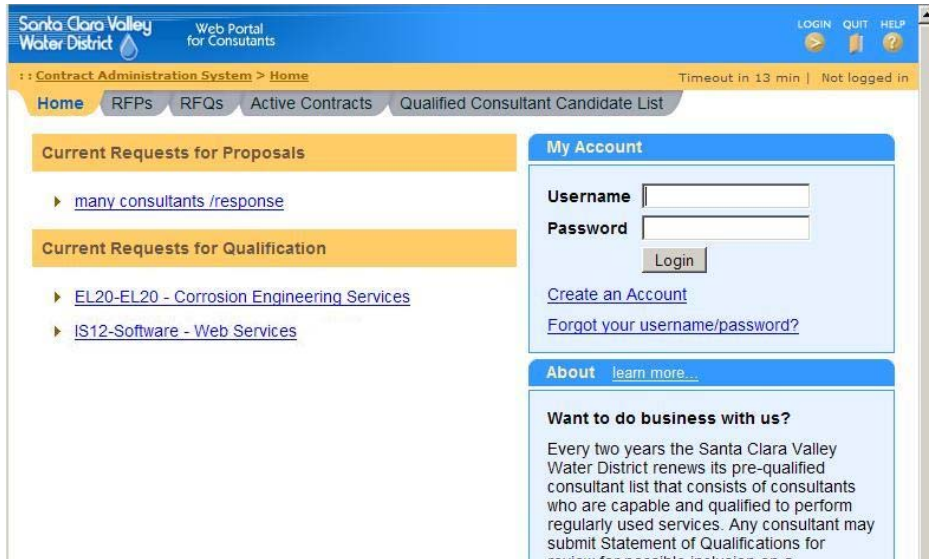


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PART I. View Published RFQ

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



2. On the portal's tab "Home", click the link to the RFQ you want to view under "Current Requests for Qualification"
3. On screen is tab "RFQ"

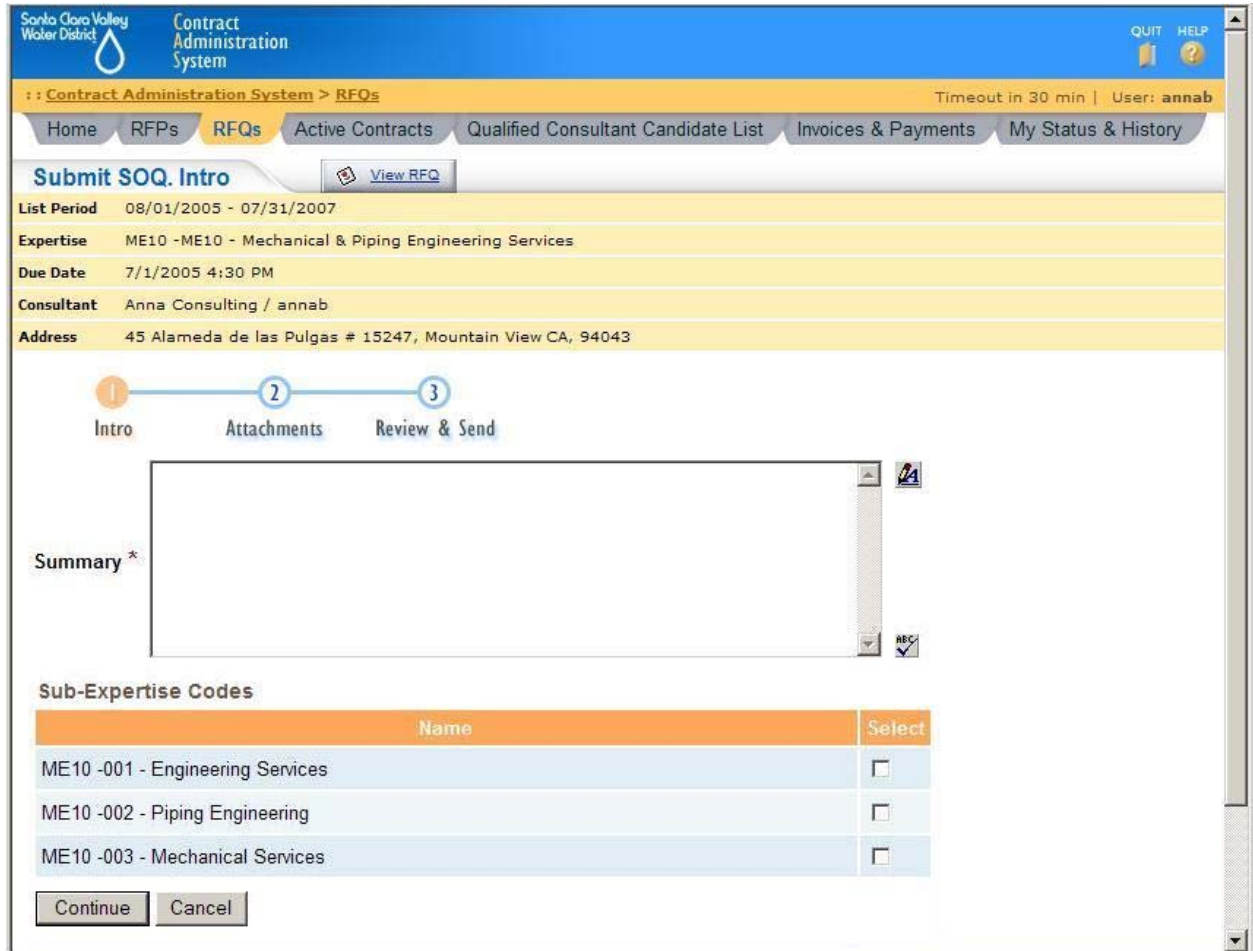


- 3.1. Read the details of the published RFQ including any Sub-Expertise Codes included.
- 3.2. If there are any Attachments, click on each attachment link to view that document.

PART II. Create/Submit SOQ

4. Press the toolbar button “Start New SOQ”

4.1. On screen is “Submit SOQ. Intro”



Contract Administration System > RFQs

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

Submit SOQ. Intro View RFQ

List Period 08/01/2005 - 07/31/2007

Expertise ME10 -ME10 - Mechanical & Piping Engineering Services

Due Date 7/1/2005 4:30 PM

Consultant Anna Consulting / annab

Address 45 Alameda de las Pulgas # 15247, Mountain View CA, 94043

1 Intro 2 Attachments 3 Review & Send

Summary *

Name	Select
ME10 -001 - Engineering Services	<input type="checkbox"/>
ME10 -002 - Piping Engineering	<input type="checkbox"/>
ME10 -003 - Mechanical Services	<input type="checkbox"/>

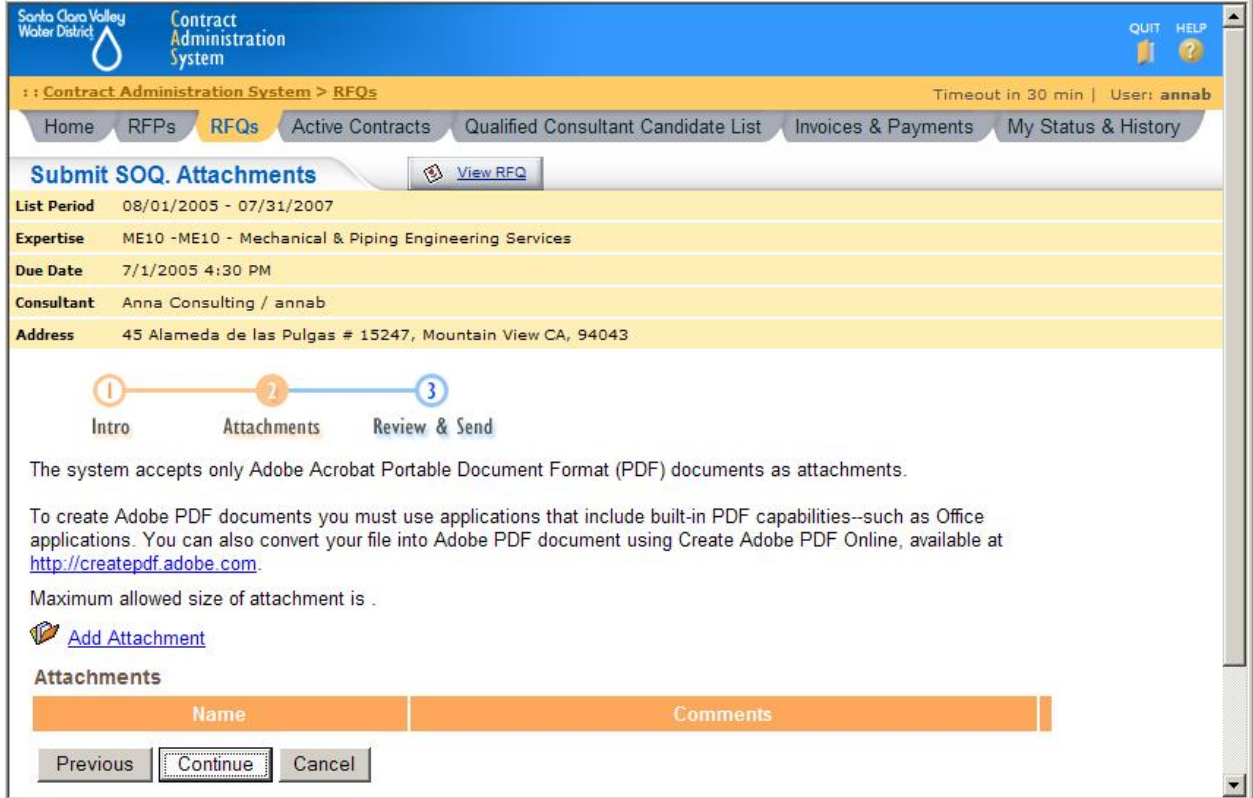
Continue Cancel

4.1.1. Enter text in the field “Summary”.

4.1.2. If applicable, check the boxes of “Sub-Expertise Codes” your company can perform. **NOTE: If sub-expertise codes are not selected your company will not be included on those lists for specialized work and you will not receive email notification when RFPs or RFQs for sub-codes are published to the portal.**

4.1.3. Press the button “Continue”. Your SOQ is automatically saved in Draft mode.

4.2. On screen is “Submit SOQ. Attachments”



Submit SOQ. Attachments [View RFQ](#)

List Period: 08/01/2005 - 07/31/2007
 Expertise: ME10 -ME10 - Mechanical & Piping Engineering Services
 Due Date: 7/1/2005 4:30 PM
 Consultant: Anna Consulting / annab
 Address: 45 Alameda de las Pulgas # 15247, Mountain View CA, 94043

1 Intro 2 Attachments 3 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 of attachment is .

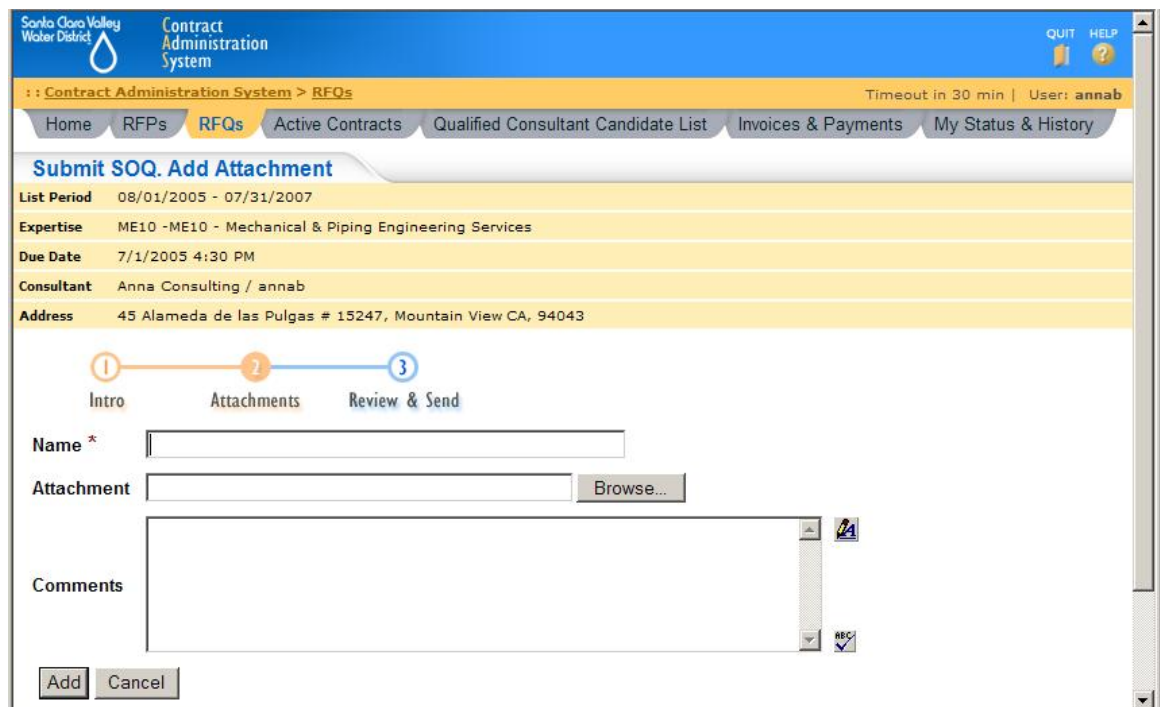
[Add Attachment](#)

Name	Comments

Previous **Continue** Cancel

4.2.1. Click on link “Add Attachment” to add your attachment(s). You must attach at least one document. Documents must be in Adobe Acrobat PDF format.

4.2.2. On screen is “Submit SOQ. Add Attachment”



Submit SOQ. Add Attachment

List Period: 08/01/2005 - 07/31/2007
 Expertise: ME10 -ME10 - Mechanical & Piping Engineering Services
 Due Date: 7/1/2005 4:30 PM
 Consultant: Anna Consulting / annab
 Address: 45 Alameda de las Pulgas # 15247, Mountain View CA, 94043

1 Intro 2 Attachments 3 Review & Send

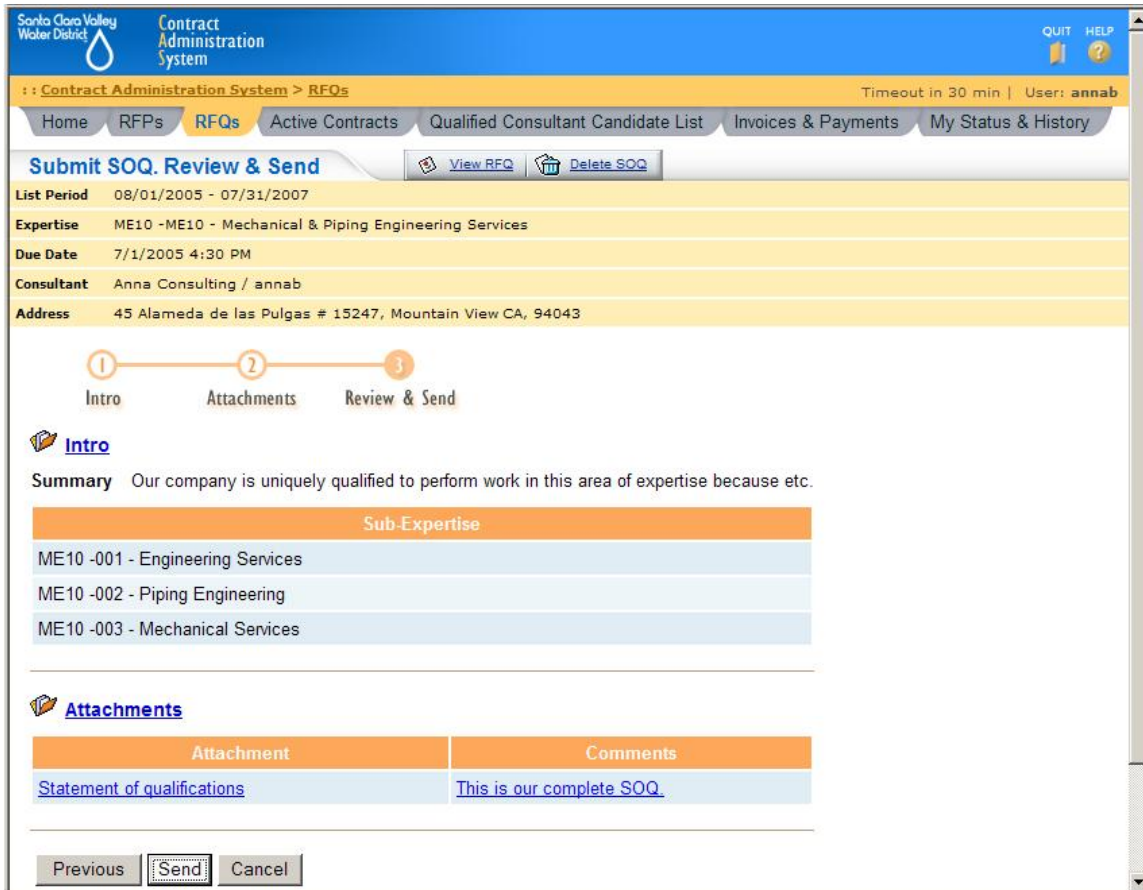
Name *

Attachment [Browse...](#)

Comments

Add **Cancel**

- 4.2.2.1.1. Fill out the fields
- 4.2.2.1.2. Press the button “Browse” and select the file you want to attach
- 4.2.2.1.3. Press the button “Add” to add the attachment to your SOQ
- 4.2.2.1.4. Repeat the above steps for each attachment you want to add.
- 4.3. When you have finished adding your attachments, press the button “Continue”.
- 4.4. On screen is “Submit SOQ. Review & Send”



The screenshot shows the 'Submit SOQ. Review & Send' page in the Contract Administration System. The page includes a navigation menu with options like Home, RFPs, RFQs, Active Contracts, etc. The main content area displays details for an RFQ, including the list period (08/01/2005 - 07/31/2007), expertise (ME10 - Mechanical & Piping Engineering Services), due date (7/1/2005 4:30 PM), consultant (Anna Consulting / annab), and address (45 Alameda de las Pulgas # 15247, Mountain View CA, 94043). A progress indicator shows three steps: 1. Intro, 2. Attachments, and 3. Review & Send. The 'Intro' section contains a summary and a table of sub-expertise items: ME10 -001 - Engineering Services, ME10 -002 - Piping Engineering, and ME10 -003 - Mechanical Services. The 'Attachments' section shows a table with one attachment: 'Statement of qualifications' with the comment 'This is our complete SOQ.'. At the bottom, there are buttons for 'Previous', 'Send', and 'Cancel'.

- 4.4.1. Press the button “Send” to submit your SOQ. Press “OK” on the confirmation pop up.

Save and Edit Later Without Submitting

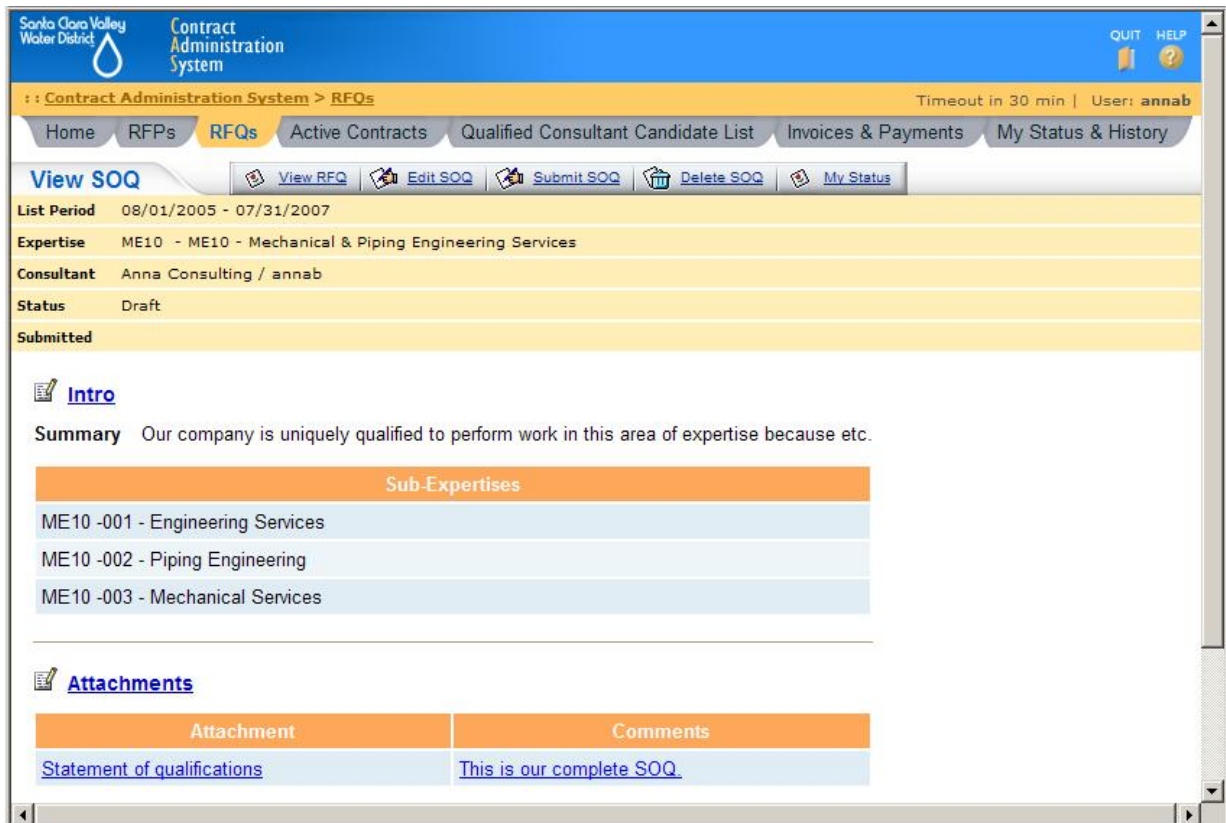
If you do not want to send the SOQ right away, or you are not able to complete all the steps in one session, do not click the button “Send”. The SOQ will be stored in Draft status and you can edit and send it later.

PART III. Edit/Submit SOQ

5. Click on the tab “RFQs”

5.1. Under the heading “My SOQs”, click the link of the SOQ you want to review/edit. Its status will be “Draft”

5.2. On screen is “View SOQ”



5.2.1. If you just want to submit your SOQ as it is, press the toolbar button “Submit SOQ”. Press “OK” on the confirmation pop up.

5.2.2. OR, if you want to edit your SOQ, press the toolbar button “Edit SOQ”.

5.2.2.1. You will be taken to the screen “Submit SOQ. Intro”. If you need to get to the screen “Submit SOQ. Attachments” to add or remove attachments, press the button “Continue”

5.2.2.2. Once you have finished your SOQ, press the button “Continue” to get to the screen “Review & Send” and then press the button “Send”.

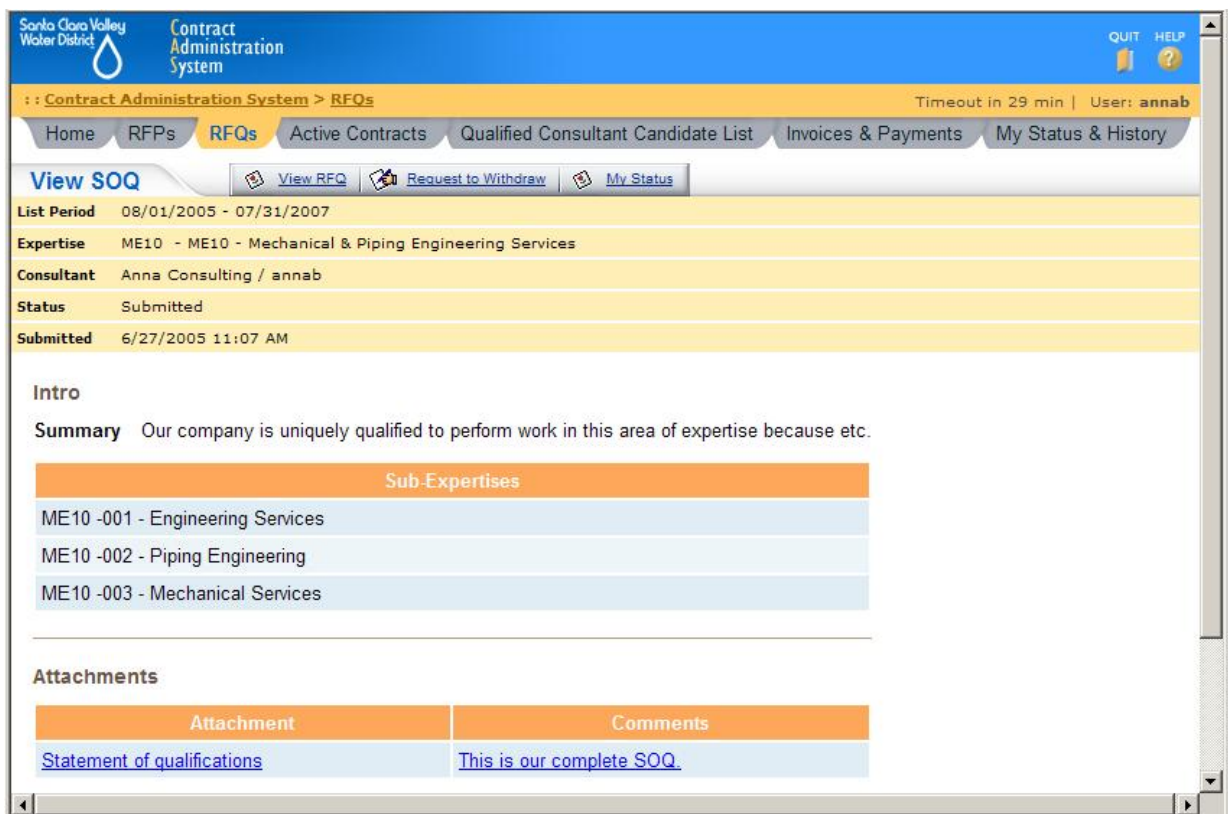
PART IV. Withdraw SOQ

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

1. Click on the tab “RFQs”

1.1. Under the heading “My SOQs”, click the link of the SOQ you want to review/edit. Its status will be “Submitted”

1.2. On screen is “View SOQ”, however, the toolbar buttons Edit, Submit, and Delete are no longer available. A new toolbar button appears, “Request to Withdraw”.



San Joaquin Water District Contract Administration System

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

View SOQ View RFQ Request to Withdraw My Status

List Period 08/01/2005 - 07/31/2007

Expertise ME10 - ME10 - Mechanical & Piping Engineering Services

Consultant Anna Consulting / annab

Status Submitted

Submitted 6/27/2005 11:07 AM

Intro

Summary Our company is uniquely qualified to perform work in this area of expertise because etc.

Sub-Expertises

ME10 -001 - Engineering Services
ME10 -002 - Piping Engineering
ME10 -003 - Mechanical Services

Attachments

Attachment	Comments
Statement of qualifications	This is our complete SOQ.

1.2.1. Press the toolbar button “Request to Withdraw”. Press “OK” on the confirmation pop up.

1.2.1.1. Your SOQ’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 SOQ’s status will automatically be changed to “Revoked”. At that point, you can return to the SOQ, edit it and re-submit it, provided the Response Due Date and Time has not passed.