

# CONTRACT ADMINISTRATION SYSTEM (CAS)

## Job Aide

Thank you for your interest and support of our programs. Any technical questions regarding establishing your account or uploading your documents, please contact the CAS hotline 408-265-2607 x2992 all other technical questions related to the RFP content please contact the Purchasing Hotline for assistance 408-265-2607 x2888 or the buyer listed in this RFP.

### 1. CREATING AN ACCOUNT

- a. You will create a web portal account for your company; later you can add contacts.
- b. Go to <http://cas.valleywater.org/> for a secure connection.
- c. On tab "Home", click the link "Create an Account."



- d. You will be taken to a screen titled "**Vendor Registration. Step 1 – Create Account**". Enter in the relevant information. Take care to make each entry generic for company-wide ease of access. It is also recommended to record these login credentials in a safe place as they are often forgotten.
- e. After clicking submit, you will reach the page "**Vendor Registration. Step 2 – Create Profile**." Pay special attention to the email address as it will be used to automatically notify your company of Request for Qualifications (RFQ) and Request for Proposals (RFP) based on the expertise/NAICS codes you list for your company.
- f. On the bottom half of the screen, you can add Contacts and Expertise Codes, shown below.



- g. Click the link "**Add Contact**" to add a specific contact person. This is optional and is typically done to "**assign**" a contact person to a particular expertise code or sub-expertise code. This will ensure that the correct person is automatically emailed whenever the Santa Clara Valley Water District (SCVWD) generates an RFQ or RFP for

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that expertise/NAICS code. It is important to note that a contact can only be assigned to one expertise/NAICS code.

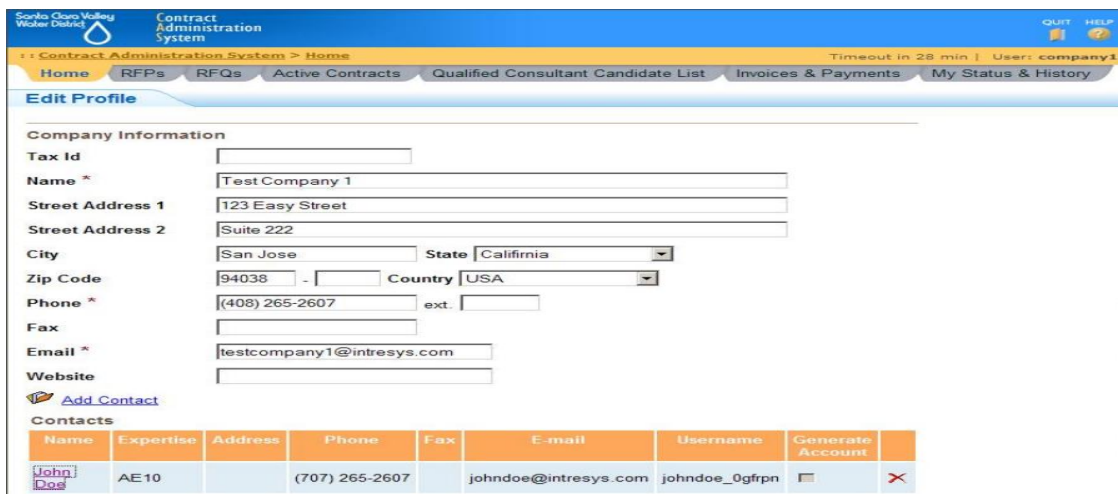
- h. Click the link ***"Add Expertise Code"*** to add all those areas of expertise that your company has an interest and ability to participate in. Press the button ***"Search"*** to see all the Expertise, Sub-Expertise, and NAICS Codes and choose the ones most relevant to your company.

## 2. UPDATING YOUR PROFILE

- a. Go to <http://cas.valleywater.org/> and log in as the parent company. You should check your account semiannually to check if all the information is accurate and therefore, take full advantage of the software



- b. Click the link ***"Update your profile"*** to change/add company information, add/modify/delete contacts, or add/delete expertise codes.
- c. On screen is ***"Edit Profile"***
- d. On screen is "Edit Profile."



## 3. SUBMITTING A PROPOSAL

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- a. Go to <http://cas.valleywater.org/> and log using your established username and password.
- b. Click on the link of the RFP/ITB you are responding to.
- c. Log on with your username and password.
- d. Click on **“Start New Response”** button.
- e. Intro box will become available; something must be typed into the intro box to move on to the next step. Typically, the language which would go into a cover letter is typed directly into the into box, however, you can simply type a note referring to all attachments, including the cover letter, in the attachment section.

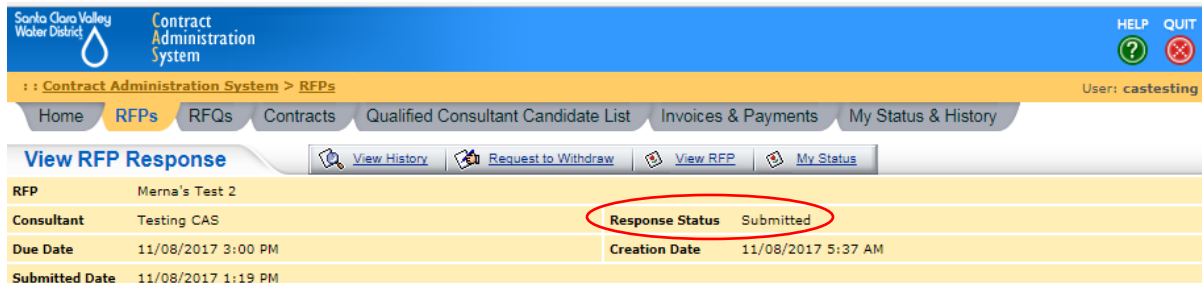
**NOTE: There is a 2000-character limit, including spaces, in the into box spaces.**

- f. Continue/Skip through **“Sub – Consultants”**, **“Approach”**, and **“Pricing”** and go straight to **“Attachments”**.
- g. Attach the entire proposal along with other supporting documents in PDF. Page limit on proposals may apply, please refer to the RFP for details.

**NOTE: There is no limit on the documents that can be attached; however, all attachments cannot exceed 10MB limit.**

- h. Continue through **“Review & Send”** and then click on the submit button.

**NOTE: To ensure your Proposal is received by the District, make sure the status reads “Submitted” as noted in the red circle in the image below.**



The screenshot shows the CAS interface with the following details:

- Header: Santa Clara Valley Water District Contract Administration System
- Navigation: Home, RFPs, RFQs, Contracts, Qualified Consultant Candidate List, Invoices & Payments, My Status & History
- Current Page: View RFP Response
- Toolbar: View History, Request to Withdraw, View RFP, My Status
- RFP: Merna's Test 2
- Consultant: Testing CAS
- Due Date: 11/08/2017 3:00 PM
- Submitted Date: 11/08/2017 1:19 PM
- Response Status: Submitted (circled in red)
- Creation Date: 11/08/2017 5:37 AM

Intro

Summary Testing File size...

### REQUEST TO WITHDRAW RESPONSE

- a. Go to <http://cas.valleywater.org/> and log using your established username and password.
- b. Click on the **“RFPs”** tab
- c. Click on the RFP you want to withdraw your proposal submission from.
- d. You should be on the **“View RFP Response”** (red circle in image below).
- e. The toolbar buttons **“Edit”**, **“Submit”**, and **“Delete”** are no longer available. A new toolbar button appears, **“Request to Withdraw”** (green circle in image below).

Santa Clara Valley Water District Contract Administration System

Contract Administration System > RFPs

User: castesting

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

**View RFP Response** View History Request to Withdraw View RFP My Status

RFP	Merna's Test 2	Response Status	Submitted
Consultant	Testing CAS	Creation Date	11/08/2017 5:37 AM
Due Date	11/08/2017 3:00 PM	Submitted Date	11/08/2017 1:19 PM

Intro  
Summary Testing File size...

e. Click on the *“Request to Withdraw”*

Santa Clara Valley Water District Contract Administration System

Contract Administration System > RFPs

User: castesting

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

**View RFP Response** View History Request to Withdraw View RFP My Status

RFP	Merna's Test 2	Response Status	Submitted
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Due Date	11/08/2017 3:00 PM	Submitted Date	11/08/2017 1:19 PM

Intro  
Summary Testing File size...

f. On screen is *“View RFP Response”*,  
**NOTE:** The status of your response should be: *“Submitted”* as noted in the red circle in the following image:

Santa Clara Valley Water District Contract Administration System

Contract Administration System > RFPs

User: castesting

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

**View RFP Response** View History Request to Withdraw View RFP My Status

RFP	Merna's Test 2	Response Status	Submitted
Consultant	Testing CAS	Creation Date	11/08/2017 5:37 AM
Due Date	11/08/2017 3:00 PM	Submitted Date	11/08/2017 1:19 PM

Intro  
Summary Testing File size...

**NOTE:** When you get to the *“View Response”* screen, *“Edit”*, *“Submit”*, and *“Delete”* will no longer be in the toolbar