

# Memorandum

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**To:** ITS Customers Requesting the Apple Express Products List 3670-A

**From:** Craig P. Orgeron, Ph.D.

**Date:** February 13, 2012 – *Updated November 9, 2012*

**Re:** Apple Express Products List: Instructions for Use

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## 1. Introduction

1.1 ITS currently has in place the Apple Express Products List (EPL) 3670-A to be used in the acquisition of Apple-branded hardware, software, and services. The Apple website, with its educational pricing offered to Mississippi educational and governmental entities alike, has been approved by ITS as a legal purchasing tool for Apple-branded products.

Non-Apple branded third party products are not part of this EPL and must be procured through alternative procurement methods within the confines of Mississippi public purchasing law.

### 1.2 *EPL Effective Dates*

The Apple EPL 3670-A has a one year term, being valid from publication date until January 31, 2013.

### 1.3 *Who May Use*

The products and services on this EPL may be acquired by Mississippi agencies, universities, community/junior colleges, and governing authorities (cities, counties, school districts, etc.)

### 1.4 *Dollar Limitations of Use*

1.4.1 The purchase limit is \$100,000 per project per fiscal year (July – June) for the use of the Apple EPL without additional approval from ITS.

1.4.2 For K-12 Schools, the dollar limitation is interpreted by ITS to be \$100,000 per project per school or campus per fiscal year with a

maximum dollar limitation of \$1,000,000 per school district per fiscal year for a project that spans multiple schools within the district.

- 1.4.3 Projects costing in excess of \$100,000 are beyond the scope of this delegated process and subject to full ITS review and authorization. Authorization to exceed the EPL dollar limitation is described in the ITS Procurement Handbook under the *EPL Planned Purchase* process, article 013-080. Below is the link to Procurement Handbook.  
<http://dsitspe01.its.ms.gov/its/procman.nsf/TOC4?OpenView>

- 1.5 This list is governed under *Procurement Instruments: Express Products Lists (EPLs)* in the ITS Procurement Handbook. The EPL is not to be confused with state contracts issued by Department of Finance and Administration, Office of Purchasing and Travel (DFA-OPT).

2. **How to Obtain Price Quotations**

- 2.1 *Contact an Apple Representative*  
 Provided below are the various Apple representatives to contact for quotes or configuration assistance.

Government	K-12 Schools	Higher Education
Name: Kyle Houser Phone: (703) 264-3215 e-mail: <a href="mailto:khouser@apple.com">khouser@apple.com</a>	Name: Neill Hitchcock, Field Rep Phone: (601) 594-1301 Fax: (601) 510-9207 e-mail: <a href="mailto:nhitchcock@apple.com">nhitchcock@apple.com</a>	Name: Andre Vlajk, Field Rep Phone: (770) 595-4563 Fax: (866) 219-9213 e-mail: <a href="mailto:avlajk@apple.com">avlajk@apple.com</a>
	Name: Adam Pirttima, Inside Rep Phone: (512) 674-2834 Fax: (866) 845-2999 e-mail: <a href="mailto:apirttima@apple.com">apirttima@apple.com</a>	Name: Dale Love, Inside Rep Phone: (800) 800-2775 ext 42823 Fax: (866) 219-9213 e-mail: <a href="mailto:dlove@apple.com">dlove@apple.com</a>

2.2 *Download the Price List*

A PDF version of the Apple Educational price list may be found at the following address:

<http://www.apple.com/education/pricelists>

There is a separate section for K-12 and Higher Education. Government entities may choose either. As stated earlier, only Apple-branded products may be purchased using the Apple EPL.

## 2.3 *Build a Custom Configuration*

2.3.1 For Educational Entities, go to the address shown below and follow the bulleted steps:

<http://www.apple.com/education/shop/contracts/>

- **Select “Mississippi”** from the “Select a State” drop down box.
- You should see the “State of Mississippi” page showing the contract number. In the upper right corner, **click “How to Buy.”**
- On the right side of the page you should see “Buying for your institution.” **Select either “Shop for K-12” or “Shop for Higher Education”** depending on your customer type.
- **Choose “Create Quote.”**
- If working from “K-12”, **enter your school’s zip code.** Otherwise, **select “Mississippi and (optionally) enter your school’s city.**
- **Choose your school and click “Continue”.** If your school does not appear in the list, call (800) 800-2775.

2.3.2 For Governmental Entities, go to  
<https://ecommerce.apple.com/asb2b/public.do?language=EN&country=US&segment=GOV-STLOC>

2.3.3 After reaching the appropriate Apple Store, you may configure your product(s), add them to a cart, and create a quote. Apple will assign your quote a web proposal number which you are to note on your purchase order.

## 3. **Miscellaneous Information**

3.1 Apple will honor the EPL product-specific pricing obtained from the Apple Education pricing on the website or from a Mississippi Apple sales agent, based on availability, as a not-to-exceed price for a period of thirty days from when the quotation was obtained. Should Apple pricing be reduced from the web pricing, Apple will extend the lower price to Mississippi customers.

3.2 Educational pricing will be available to both Mississippi educational and governmental entities at the same not-to-exceed price.

3.3 Apple’s standard shipping costs are included as part of the product purchase price. Documentation is included. The operating system is pre-loaded on all systems

with backup on CD shipped with the documentation. The customer will be responsible for any expedited shipping costs.

- 3.4 Installation services are available for non-portable computers and servers as a line item on the website or from an Apple sales agent. Contact Apple for a quotation.
- 3.5 The Apple EPL has its own contract, the “Express Products List Purchase Agreement”, executed by Apple and ITS. Click here to review a PDF version of this contract:

<http://www.its.ms.gov/Procurement/Documents/apple/3670a-applecontract.pdf>

Should your purchase be large or involve special terms, you may wish to negotiate a separate supplemental contract with the vendor before the time of purchase to address any additional concerns not addressed in the EPL Purchase Agreement.

#### 4. **How to Place Your Order**

- 4.1 Place EPL orders directly with Apple. You may not place an Apple EPL order with Apple dealers or third party networks. Apple Inc. is the only approved vendor on this EPL.
- 4.2 Confirm all orders with the vendor prior to issuing the appropriate purchase orders.
- 4.3 Non-EPL items ordered in conjunction with your Apple EPL purchases must be purchased using alternative procurement methods. You may not use the Apple EPL as your authority during an audit for these non-Apple branded items. Your purchasing authority for any non-EPL item would need to be based on other public purchasing mechanisms, with accompanying documentation for your audit trail. We suggest non-EPL items ordered on the same purchase order as EPL items be clearly labeled as such.
- 4.4 Please include the following information on all purchase orders.
  - 4.4.1 “Apple Express Products List 3670-A”
  - 4.4.2 “Bill to” address
  - 4.4.3 “Ship to” address
  - 4.4.4 Purchase order number
  - 4.4.5 Clear description and Apple part number
  - 4.4.6 Contact name and phone number for your agency/institution’s purchasing agent

4.4.7 Include/submit the Apple quotation from either the website or sales agent with your purchase order.

4.5 The table below shows the Place Order and Remit Payment addresses.

<i>Place Order</i>	<i>Remit Payment</i>
<p><b>For K-12 and Higher Education Customers</b>            Apple Inc.            MS: 198-3ED            12545 Riata Vista Circle            Austin, TX 78727-6524            Phone: (800) 800-2775            Fax for K-12: (800) 590-0325            Fax for Higher Ed: (800) 590-0063</p> <p><b>For State and Local Government Customers</b>            Apple Inc.            MS: 198-4ENT            12545 Riata Vista Circle            Austin, TX 78727-6524            Phone: (855) 438-0486            Fax: (866) 821-7947            e-mail: <a href="mailto:govorders@apple.com">govorders@apple.com</a></p>	<p>Apple Inc.            P.O. Box 846095            Dallas, TX 75284-6095            SAAS Code: V000019270-i</p>

5. **Object Codes**

ITS, in conjunction with the Office of the State Auditor and the Department of Finance and Administration, requests that all EPL customers carefully code purchases with the correct Minor Object Codes. State agencies that utilize the Statewide Automated Accounting System (SAAS) should use the following expenditure account codes on purchase order documents for purchases from this EPL.

<b>Object Code:</b>	<b>Category:</b>	<b>Use For:</b>
63421	Capital Outlay: IT Equipment	<ul style="list-style-type: none"> <li>• Purchase of Apple hardware products (including all associated components and services obtained at time of initial purchase)</li> <li>• Purchase of additional components (e.g. network cards, memory upgrades, hard drive replacements) incorporated into capitalized equipment</li> </ul>
63462	Capital Outlay: IT Equipment	<ul style="list-style-type: none"> <li>• Lease-purchase of Apple hardware products (including all associated components and services obtained at time of initial purchase)</li> <li>• Lease-purchase of additional components (e.g. network cards, memory upgrades, hard drive replacements)</li> </ul>

		incorporated into capitalized equipment
62555	Commodities	<ul style="list-style-type: none"> <li>• Monitors costing less than \$1000 and purchased separately from base unit</li> <li>• Other accessory items purchased separately</li> </ul>
61921	Contractual	Payments for the purchase or licensing of mainframe, midrange, LAN or desktop software and any associated installation services.

6. **American Recovery and Reinvestment Act (ARRA) of 2009**

- 6.1 To the best of our knowledge and current assessment, ITS believes the EPLs are valid purchase instruments for the use of ARRA funds.
- 6.2 We recommend that customers using these instruments for purchases using ARRA funds obtain written quotations from multiple EPL sellers, that the request for quotations state that ARRA funds will be used for the purchase, and that all quotations be maintained in the purchase file.
- 6.3 ITS EPLs are established based on sealed proposals submitted by vendors in response to Request for Proposals (RFPs) advertised in accordance with all state statutory requirements for legal procurements of IT products. The EPL RFPs were advertised both in a newspaper with statewide circulation and on the Mississippi Development Authority (MDA) Mississippi Procurement Technical Assistance Program website. Advertisements exceeded the minimum timeframes required for ARRA purchases. Proposals received in response to these RFPs were evaluated, awarded, and published for the use of any public entity in the state in accordance with the Instructions for Use published by ITS.
- 6.4 ITS recommends that customers using this EPL for purchases using ARRA funds work with the vendor to ensure that they have adequate contractual protection as recommended by the Mississippi Office of the State Auditor. To see recommended articles for consideration for inclusion in your ARRA contract, see “ARRA EPL Information for Stimulus Purchases” on the ITS website <http://www.its.ms.gov/Procurement/Pages/EPLs.aspx> or see the Department of Finance and Administration site, [http://www.mmrs.state.ms.us/statewide\\_applications/Stimulus/index.shtml](http://www.mmrs.state.ms.us/statewide_applications/Stimulus/index.shtml) .

7. **What Goes in Your Purchase/Audit File**

At a minimum, include:

- 7.1 A copy of this memorandum.
- 7.2 A copy of the purchase order.

7.3 A copy of either the written fax or e-mail quotation from Apple or the web proposal quotation containing pricing for your particular purchase from the Apple website.

7.4 Any additional project related documentation or justification.

8. **To Report Problems or Request Assistance**

8.1 If you have any feedback that may help us to improve this process, or if you have any problems with your EPL order, please let ITS know. We suggest you notify the vendor of the problem in writing and send a copy to ITS. You may contact us in writing by one of the following ways:

8.1.1 E-mail: [isshelp@its.ms.gov](mailto:isshelp@its.ms.gov)

8.1.2 FAX: (601) 713-6380

8.1.3 Mail: ITS, 3771 Eastwood Drive, Jackson, MS 39211

8.2 If you have questions about using the EPL, please contact the Procurement Help Desk at (601) 432-8166.

8.3 ITS is also available to host a “mini-class” on how to use our EPLs at a customer’s request. Please contact the Procurement Help Desk if interested.

Copies of this document are available on the Internet at <http://www.its.ms.gov>