

Memorandum

To: ITS Customers Requesting Esri Software
From: Craig P. Orgeron, Ph.D. ^{CAO}
Date: February 3, 2012
Re: Esri Express Products List 3670-D: Instructions for Use

1. Introduction

- 1.1 ITS currently has in place an Express Products List (EPL) to be used in the acquisition of Environment Systems Research Institute, Inc. (Esri) software products. ITS EPLs meet Mississippi requirements for legal purchases. The Esri EPL 3670-D was created based on the following agreements with Esri.
- 1.1.1 The Esri Master Purchase Agreement (MPA), #2003MPA6052, is a contract between Esri and ITS on behalf of Mississippi governmental and educational entities executed December 16, 2004.
- 1.1.2 The Esri Small Municipal and County Enterprise License Agreement (ELA) was added to the MPA Terms and Conditions on May 21, 2008. Pricing for this agreement is listed on the Esri price catalog under "Small Government Enterprise License." The ELA is a three year limited term license as opposed to the perpetual licenses purchased under the MPA. The procedure for submitting ELA purchases differs from the MPA procedures. These procedures are addressed further in this document.
- 1.2 *EPL Effective Dates*
The Esri EPL 3670-D has a one year term, being valid from publication date until January 31, 2013.
- 1.3 *Who May Use*
The products and services on the attached EPL price sheet 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 \$250,000 per project for the use of the Esri EPL without additional approval from ITS.

1.4.2 Projects costing in excess of \$250,000 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. **The Mississippi Coordinating Council for Remote Sensing and Geographic Information Systems**

The Mississippi Coordinating Council for Remote Sensing and Geographic Information Systems was created out of House Bill 861 during the 2003 regular session of the Mississippi Legislature. The council's responsibilities included assisting ITS in establishing policies and standards in the review and approval of procurements of both hardware and software related to remote sensing and geographic information systems (GIS.) On September 2, 2004, the council approved the establishment of EPLs for certain GIS software based upon standards recommended by the council's Technical User Group Standards Sub-Committee. The Esri EPL was one of several GIS Software EPLs recommended by this sub-committee.

3. **Mississippi-Esri Website**

3.1 Esri has worked with ITS to established a special Mississippi-Esri website containing the approved MPA price list and ordering instructions.

3.2 The Mississippi-Esri website can be found at the following address:

<http://www.esri.com/mississippi>

From the initial page, you will be prompted to log in or "Create New Account" if you do not have an existing username and password. Please note that there is not a generic Mississippi account set up for this site. Each customer must create their own account to continue.

3.3 The panel on the left side of the page gives you the Esri contract number, the EPL number, a link back to the ITS website, a link to a PDF version of the MPA catalog, information on how to order, and training information.

4. **Product and Pricing**

- 4.1 The prices stated in the MPA price list are not-to-exceed prices and incorporate a quantity discount based upon Mississippi volume. Customers should request quotations for any volume pricing from an Esri representative. Very large quantities or special promotion offers are available in some instances.
- 4.2 ELA pricing is listed on the MPA price list under “Small Government Enterprise License.” You must contact one of the ESRI representatives listed in the contact information for an ELA quote.
- 4.3 Shipping costs are not included as part of the product purchase price. The MPA price list includes the following footer: “Shipping and Handling not to exceed \$40 on applicable orders (call for quote)”.
- 4.4 Customers may obtain price quotations in one of the following ways.
 - 4.4.1 Use the price list posted on the Mississippi-Esri website.
 - 4.4.2 Contact an Esri representative listed in these instructions.
 - 4.4.3 Contact an Esri Business Partner approved to sell under this EPL.

5. **Esri Business Partners**

- 5.1 The MPA allows for qualified Esri Business Partners to participate under this contract. Currently ITS has not approved any partners to participate under this agreement.
- 5.2 The instructions for applying to sell under this agreement may be found at the following address:

<http://www.its.ms.gov/rfps/ESRI-LOC-for-resellers.pdf>

This *Instructions for Use* document will be updated if and when a partner has been approved by ITS.

6. **How to Place Your Order**

- 6.1 *Special Order Form*
Esri requests that their order form accompany the purchase order. This form is available on the Mississippi-Esri website under “How to Order.”
- 6.2 *Purchase Order:*
Provided below are the instructions for completing the purchase order
 - 6.2.1 The purchase order must be made out to Esri.

- 6.2.2 If working with an ITS approved Esri partner, the partner’s company name should be included in the body of the purchase order.
- 6.2.3 Include “Esri EPL 3670-D” to identify the purchase for audit purposes with the ITS and Esri agreement.
- 6.2.4 Include the following language on the face of the purchase order: “Subject to Master Purchase Agreement No. 2003MPA6052”.
- 6.2.5 Show shipping charges as a line item
- 6.2.6 Include the following additional information
 - 6.2.6.1 Name or identification of licensee, place of delivery, end user name, and contact information
 - 6.2.6.2 Purchase order number
 - 6.2.6.3 Date delivery is requested (allow 30 days after Esri’s receipt of order)
 - 6.2.6.4 Quantity, description, and unit price pro each item ordered.

6.3 *Special Instructions for Purchases under the ELA*
 Approved licensees shall submit a purchase order that references the ELA quotation and shall include the following statement on the face of the purchase order.

“THIS PURCHASE ORDER IS GOVERNED BY THE TERMS AND CONDITIONS OF MASTER PURCHASE AGREEMENT NO. 2003MPA6052, AND ANY DIFFERENT OR ADDITIONAL TERMS AND CONDITIONS IN OR WITH THIS PURCHASE ORDER SHALL NOT APPLY.”

6.4 *Contact Information*
 Provided in the table below are the various contacts for Esri including addresses for placing your order and remitting payment. Please contact Esri with any questions regarding pricing or products on this list.

Contact Information:	
Inside Sales Sarah Powers Office: (713) 401-0658 ext 5806 Fax: (210) 499-4112 spowers@esri.com	Mississippi Account Manager Michael Funaro Office: (210) 499-1044 ext 8861 Mobile: (210) 792-4729 Fax: (210) 499-4112 mfunaro@esri.com

Place Order To:	
For MPA purchases: Environmental Systems Research Institute Attn: Customer Service Department 227 N. Loop 1604 East, Suite 100 San Antonio, TX 78232 Fax: (909) 307-3049 SAAS Code: V0000624852	For ELA purchases: Environmental Systems Research Institute Attn: Esri Customer Service, Dept SG- ELA 380 New York Street Redlands, CA 92373-8100 service@esri.com Fax: (909) 307-3083 SAAS Code: V0000624855
Remit To:	
Environmental Systems Research Institute 227 N. Loop 1604 East, Suite 100 San Antonio, TX 78232 SAAS Code: V0000624852	

7. **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.

Object Code:	Category:	Use For:
61921	Contractual	Payments for the purchase, licensing, and maintenance of software for telecommunications, mainframe, mid-range, LAN or desktop, or mobile devices including any associated installation services.

8. **Contract**

The customer's purchase order becomes a supplement to the MPA. It is not necessary for the customer to negotiate a separate contract or supplement. The customer may obtain a copy of this agreement for their files by contacting the Esri representative or ITS.

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

At a minimum, include:

- 9.1 A copy of the purchase order.
- 9.2 A copy of this memorandum.

9.3 A copy of either the written quotation from Esri or the Esri Business Partner or the page containing pricing for your particular purchase from the Esri website.

9.4 Any additional project related documentation or justification.

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

10.1 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:

10.1.1 E-mail: isshelp@its.ms.gov

10.1.2 Fax: (601) 713-6380

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

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

10.3 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>