

# Memorandum

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**To:** ITS Customers Requesting Microsoft Software  
**From:** Craig P. Orgeron, Ph.D.  
**Date:** December 1, 2010 (*updated June 19, 2013*)  
**Re:** Instructions for Use for Microsoft Express Products List 3640

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## 1. Introduction

### 1.1 *Covered Software*

EPL 3640 may be used in the acquisition of licenses, maintenance, upgrades, support, training, distribution media, and documentation of Microsoft Licensing Programs. The following is a list of Microsoft Software Agreements covered under EPL 3640:

- **Microsoft Government Select Agreement:** Government Select Agreement # **01S63648** expired 09-30-2012 and was replaced by a new Government Select Plus Agreement # **8448630**.
- **Microsoft Academic Select Plus Agreement:** Academic Select Agreement # **01S64540** expired 12-31-2010 and was replaced by a new Academic “Select Plus” Agreement # **5941227**.
  - Customers need to set up a new “enrollment” account under the new Select Plus Agreement # **5941227** before any new purchases are made in order to have online administrative access to your licenses. The paperwork includes filling out the "Select Plus Affiliate Registration Form" and a new "Program Signature Form". Work with your reseller to set up your account before any new purchases are made. See number 4 of this memo below for more information about Enrollment Accounts.
  - Please note that “Select Plus” differs in several ways from the previous “Select” agreements. Talk with your reseller or Microsoft representatives referenced below.

- **Microsoft Enterprise Agreement (EA):** EA #01E62413.
- **Microsoft School Agreement:** The School Agreement provides annual subscriptions to K-12 schools based on their number of desktop computers. K-12 Schools may use EPL 3640 and one of its awarded vendors to tailor their own School Agreement.
- **Campus Agreement:** The Campus Agreement provides annual subscriptions to colleges and universities based on their Full Time Equivalents (FTE) of students and faculty.
  - Mississippi Community and Junior Colleges have a Consortia Campus Agreement # **01C35668** in place. CDW-G administers this Consortia Campus Agreement.
  - Institutions of Higher Learning have Campus Agreement #**01C36077** in place. Customers can use both CDW-G and Dell Marketing, L.P.

1.2 *Awarded Vendors*

The following resellers were chosen through Request for Proposal 3640 to administer the Microsoft Software sales:

- Dell Marketing L.P. (formerly ASAP Software)
- CDW Government

All orders should be placed through one of these vendors.

1.3 *Who May Use*

- 1.3.1 This EPL may be used by Mississippi agencies, universities, community/junior colleges and local governing authorities (cities, counties, school districts, etc.).
- 1.3.2 ITS EPLs are multi-vendor awards that meet Mississippi requirements for legal purchase.

1.4 *Dollar Limitations of Use*

- 1.4.1 The maximum dollar limitation of this EPL (without coming through ITS) is \$500,000 per fiscal year. This limit is applicable to all categories of EPL users.
- 1.4.2 For Microsoft purchases less than or equal to \$250,000 per fiscal year, the customer may elect to request quotations from a single EPL Vendor or from both EPL Vendors.
- 1.4.3 For Microsoft purchases over \$250,000 per fiscal year but less than or equal to \$500,000 per fiscal year, the customer must solicit competitive quotations from both of the EPL 3640 Vendors. The customer would select the lowest and best proposal using guidelines “Scoring Matrix for Customers Using the Microsoft EPL” published at <http://www.its.ms.gov/Procurement/Pages/3640.aspx>.

- 1.4.4 Purchases over \$500,000 per fiscal year must be approved by ITS for additional purchasing authority.
- 1.4.5 If a customer pre-pays Software Assurance beyond year one under Select or an EA with multiple years in the same fiscal year, the total amount paid in that fiscal year still must follow the above dollar limitation guidelines.
- 1.5 *EPL 3640 Effective Dates*  
EPL 3640 has a three-year contract: December 1, 2010 – November 30, 2013.
- 1.6 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 the Department of Finance and Administration, Office of Purchase and Travel (DFA-OPT.)
- 2. **How to Contact Vendors and Obtain Price Quotations for Microsoft EPL 3640**
  - 2.1 Customers may work with one or both of the vendors for pricing quotes. These quotations may be from the vendor’s special Mississippi Website for Microsoft products approved under EPL 3640 or may be in the form of a written quotation (FAX or E-Mail is acceptable.) The price among the awarded vendors may vary.
  - 2.2 Directions for Price Quotations from **Dell Software**  
Access this link:  
<http://www.its.ms.gov/Procurement/Documents/software/3640-Dell.pdf>.  
  
Directions for Price Quotations from **CDW Government**  
Access this link:  
<http://www.its.ms.gov/Procurement/Documents/software/3640-CDW-G.pdf>.
- 3. **EPL Best Practices**
  - 3.1 *Evaluate your technical needs.* Work with the vendor(s) to verify the software license or maintenance versions that best fit your needs.
  - 3.2 *Negotiate for best pricing.* EPL prices are “not-to-exceed” proposals that may be lowered but not raised. Check with the EPL vendor for availability and for quantity discounts.
  - 3.3 *Consider life-cycle maintenance costs.* Investigate the total life cycle cost, including maintenance costs and requirements. Some license agreements require the customer to purchase subsequent software maintenance. Be sure to ask your vendor if the license is perpetual or subscription based.
  - 3.4 *Consider contracts.* Each awarded vendor has signed a Master Purchase Agreement with ITS. The purchase order from any individual customer will serve as a supplement to these agreements. Additional terms and conditions may be negotiated between the customer and vendor at the time of sale, as needed, as a

supplement to the Master Agreement. You may request a copy of a vendor's Master Agreement from the vendor or from ITS. Additionally, you may request a copy of the underlying agreement between ITS and the software manufacturer if needed.

- 3.5 *Place your order.* Place EPL orders directly with the vendor. Please reference EPL number 3640 on your purchase order. Shipping costs are included as part of the purchase price.

4. **Select Enrollment Form**

Each customer is encouraged to fill out a separate "Select Enrollment Form." Request the Enrollment Form from your chosen EPL reseller under EPL 3640 -- either Dell Software or CDW-G. You will be able to easily track your licenses, Product Keys, & Software Assurance Benefits. By signing up with the above resellers attached to the state agreement, many of the minimum requirements for a separate enrollment are waived – meaning you get the benefit of the state price, while you still may be a smaller agency. Some enrolled affiliates may also be eligible to receive a CD-ROM update kit periodically until the end of the Select License agreement. Any state entity (government or education) should take advantage of having its own enrollment number under the State Microsoft Agreement. Microsoft would like to help – if you have any questions, contact Becky Armbruster, [beckya@microsoft.com](mailto:beckya@microsoft.com) or call 425-706-5216.

5. **Object Codes**

- 5.1 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 use the Statewide Automated Accounting System (SAAS) should use the following expenditure account code on purchase order documents for purchase from this EPL:

<i>Object Code</i>	61921
<i>Category</i>	Contractual
<i>Use For</i>	Payments for software acquisition, installation, and maintenance.

6. **NON-EPL Items**

Vendors who are approved under Microsoft EPL 3640 also sell other software and hardware that may appear on their respective websites. Please remember that RFP 3640 only covers Microsoft Software. Items ordered that are **not** from this manufacturer must be purchased using alternative procurement methods. Your authority for purchasing these items 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.

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

- 7.1 A copy of the purchase order
- 7.2 A copy of the product and pricing information for each product being purchased. This may be the written FAX/E-Mail Quotation from the selected vendor or the page containing pricing for your particular purchase from the selected vendor's website.
- 7.3 Any additional project-related documentation or justification.

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

- 8.1 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. If you have feedback that may help us improve the EPL process, we also want to know about it. Please contact us in writing by mail, by FAX at (601)-713-6380, or by E-Mail at [isshelp@its.ms.gov](mailto:isshelp@its.ms.gov) .
- 8.2 If you have questions about using the EPL, please contact the **Procurement Help Desk at (601) 432-8166.**