

DoD ESI ORDERING GUIDE



**Microsoft Enterprise
Services**

Contractor: Microsoft

**Indefinite Delivery/Indefinite
Quantity (IDIQ)**

N66001-19-D-0019



**Department of Defense Enterprise Software Initiative (DoD ESI)
Microsoft Enterprise Services
ORDERING GUIDE**

This Ordering Guide has been developed by the DoD ESI team to assist IT buyers and contracting officials to order Microsoft services from the DoD ESI Agreement holder. This Guide contains essential information about the DoD ESI Enterprise Agreement (EA), identifies the authorized users of the EA, summarizes the products and services available under the EA and instructions for users to place an order, and provides Points of Contact information for support.

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1. General Information

CONTRACT OR/VENDOR	<u>MICROSOFT CORPORATION</u>
IDIQ NUMBER AND WEBLINK	N66001-19-D-0019 www.esi.mil
IDIQ ISSUE DATE	11 JAN 2019
IDIQ EXPIRATION DATE	10 JAN 2024



2. Authorized Users

a. DoD or Agencies

The IDIQ is open for ordering by the “DoD Departments and Agencies” on a world-wide basis. “Departments and Agencies” are defined by the 48 Code of Federal Regulations, Section 202.101. In addition, “DoD or Agencies” includes the Intelligence Community (IC) and the U.S. Coast Guard. For the purposes of this IDIQ contract, a DoD component is defined as follows: the Office of the Secretary of Defense (OSD), the Military Departments, the Chairman of the Joint Chiefs of Staff, the Unified Combatant Commands, the Inspector General of the Department of Defense (DoD IG), the Defense Agencies, the DoD Field Activities, the U. S. Coast Guard, Intelligence Communities (IC) and Foreign Military Sales (FMS) with a Letter of Authorization.

b. GSA, Other Ordering Organizations, and Organizations

GSA or other applicable ordering agencies /organizations, ordering on behalf of the DOD and/or FMS, are authorized to place Orders under this IDIQ and must comply with DFARS 208.74.

c. Contractors and Integrators

Government contractors performing work for a DoD Component (as defined above) may place Orders under this IDIQ contract on behalf of and for the benefit of the DoD entity if authorized by their cognizant Contracting Officer in accordance with the requirements of FAR 51 and/or DFARS 251 as appropriate.

3. Services Overview

Publisher	Category	Service Line
Microsoft	Microsoft Consulting Services Microsoft Premier Support	Plan, Design, Architect, Develop, Code, and Deploy Proactive Support (to include performance concerns, disaster recovery, and configuration assistance) 24/7/365 Mission Critical Reactive Support



4. Ordering Officer Responsibilities

- a. Ordering is decentralized. Only U.S. Government Contracting Officers, Government Purchase Card Holders, or Contractors given FAR 51 Authorization are able to place orders against this IDIQ contract.
- b. The Ordering office shall:
 - i. Document a Within Scope Determination. A Class J&A document was executed for this contract for both MPS and MPES under the authority of Federal Acquisition Regulation (FAR) 6.302-1. Execution of a Task Order Justification and Approval document is not required. However, Ordering Contracting Officers are required to complete a Within Scope Determination in accordance with FAR 6.303-1(d) and FAR 16.505(a) (2). Ordering Contracting Officers are encouraged to coordinate with technical and requiring activities to ensure MES are the only services available to meet agency needs. A template has been created and is attached to this document to assist in determining work within-scope.

Contracting Officers are to ensure that the services required cannot be successfully performed by other services provided by Microsoft or Microsoft service partners. In general, use of MPS services are appropriate for post-deployment break/fix maintenance of Microsoft product-based systems where 24X7 critical response is required for mission critical systems, end-of-life Microsoft products require on-going support to include custom development of service packs, patches, security fixes, hot-fixes to ensure compliance with DoD Information Assurance policy and directives, and complex environments with customized installations requiring access by Microsoft developers to Microsoft source code to properly maintain the life of a system.

In general, use of MPES services are appropriate for enterprise-level technology planning, architecture, design and deployment situations where access to future (pre-release product) information and beta testing plays a critical role in determining the overall solution, and unrestricted access to Microsoft software developers and source code is required to customize a Microsoft product based solution.

Use of MES is not appropriate when requirements do not require the expertise of Microsoft engineers. Examples of when use of MES is not appropriate are; Microsoft application/product training for Office, Project, Visio and Server Development, Business Process Training such as Information Technology Information Library (ITIL) or Lean Six Sigma, or SharePoint portal development, software upgrades or platform support where source code access is not required.

The ordering activity will be responsible for generating unique Performance Work Statements (PWS) and Quality Assurance Surveillance Plans (QASP). The PWS will be critical in determining the level service required to be performed by Microsoft and has a significant bearing on the final price of services.

Department of Defense Form 254 (DoD Form 254), Contract Security Classification Specification, may be required and as applicable should be attached to the task order as an attachment.



- ii. Ensure compliance with all fiscal laws prior to issuing an order under this IDIQ contract;
- iii. Incorporate into the order any regulatory and statutory requirements that are applicable to the agency for which the order is placed, if pertinent requirements are not already included in the IDIQ contract; [Note: Ordering Officers are responsible for incorporating the most current version of the applicable FAR and DFARS clauses, at the ordering level, in the Task Order as appropriate]
- iv. Obtain the required authorization to acquire the services through the DoD ESI IDIQ contract in accordance with FAR Part 51 when a contractor is ordering on behalf of a DoD component;
- v. Ensure the vendor selected for the order represents the best value;
- vi. Review the Services contract terms and conditions within this IDIQ contract when ordering services. If required, ordering offices may secure additional terms and conditions at the Order level if those terms and conditions do not conflict with those at the IDIQ contract level.

5. Ordering Process

a. DFARS Regulation 208.74

- i. DFARS 208.74 requires authorized software services buyers and requiring officials to review the DoD ESI website for an existing DoD ESI agreement before pursuing another acquisition method. DFARS procedures are:
 - 1. If a DoD component must obtain the commercial services outside the DoD ESI IDIQ contract, the component must seek a waiver from a management official designated by the DoD Component. After the steps in paragraphs (5)(i) and (5)(ii)(A) of the DFARS PGI 208.7403, Acquisition procedures have been completed.

b. Ordering

- i. Orders are subject to the ordering office's local policy, and the terms and conditions of this IDIQ contract. The order may be placed directly with Microsoft after ensuring compliance with the Ordering Officer Responsibilities specified in Section 4. The following is needed to place an order:
 - 1. Execution of a task order (SF1449) by the respective local contracting office:
 - A. Contracting Officers will need to create an External Award shell using their respective contract writing system in order to execute task orders against this IDIQ contract (see section 7).
 - B. If the Contracting Officer does not use an automated contract writing system, enter the IDIQ contract number N66001-19-D-0019 in Block 2 and a locally assigned task order number in Block 4. Note: Ensure you complete the FPDS-NG report.
 - C. The completed SF1449 will be forwarded to the contractor with the following information:



Contractor / Vendor Information

Address: **1 Microsoft Way
Redmond, WA, 98052**

Remit To: **PO BOX 844510 Dallas
TX, 75284-4510**

CAGE: 60128

DUNS: 0811466849

TIN: 91-1144442

Business Size: Large

- D. A copy of the SF1449 must be sent to the servicing DFAS center.
- 2. Government-Wide Purchase Card orders / quotes can be submitted via telephone or the vendor’s website (See Section 6c “Sales and Ordering”)
 - A. Orders can be placed via email: MSFTSPAWARESI_IDIQ@microsoft.com
 - B. Information Required from the Ordering Office:
 - i. End User and Name
 - ii. End User Email Address
 - iii. End User Phone Number
 - ii. Ordering Period – If orders issued within the IDIQ contract Ordering Period(s) include options, the order options may be exercised after the IDIQ contract ordering date(s) provided that:
 - 1. The initial order that includes the option was issued during the IDIQ contract ordering period(s), and does not exceed 60 months past the expiration date of the IDIQ contract;
 - 2. The Ordering Office satisfies all other applicable regulations for exercise of the option.
 - iii. The contract and its related documents are provided so that customers may leverage a common set of RFP and contract standards that will assist customers and Microsoft to accelerate the procurement cycle. Included in this package of documents are:
 - 1. Templates
 - A. Template – Schedule G - Incremental Funding Language
 - B. Template – PWS (specific to the ESI IDIQ)
 - C. Template – MPES Within Scope Determination
 - D. Template – MPS Within Scope Determination



2. Samples

- A. Sample – MCS-MPS ESI Agreement Pricing (submitted as part of the proposal response)
- B. Sample – Microsoft Technical Response (ESI IDIQ) (submitted as part of the proposal response and incorporated as part of the award)
- C. Sample – Schedule G - Microsoft Payment Schedule (added into the continuation sheet of the award)

6. Points of Contact

a. Contracting Office

	Procuring Contracting Officer (PCO)	Alternate Point of Contact
POC	SpencerSessions	Veronica Beck
Telephone	619-553-4523	619-553-4532
Email	spencer.sessions@navy.mil	veronica.beck@navy.mil

b. Software Product Manager (SPM)

	Software Product Manager (SPM)	Alternate Point of Contact
POC	Rino Ortega	n/a
Telephone	619-553-2893	n/a
Email	rino.ortega@navy.mil	n/a

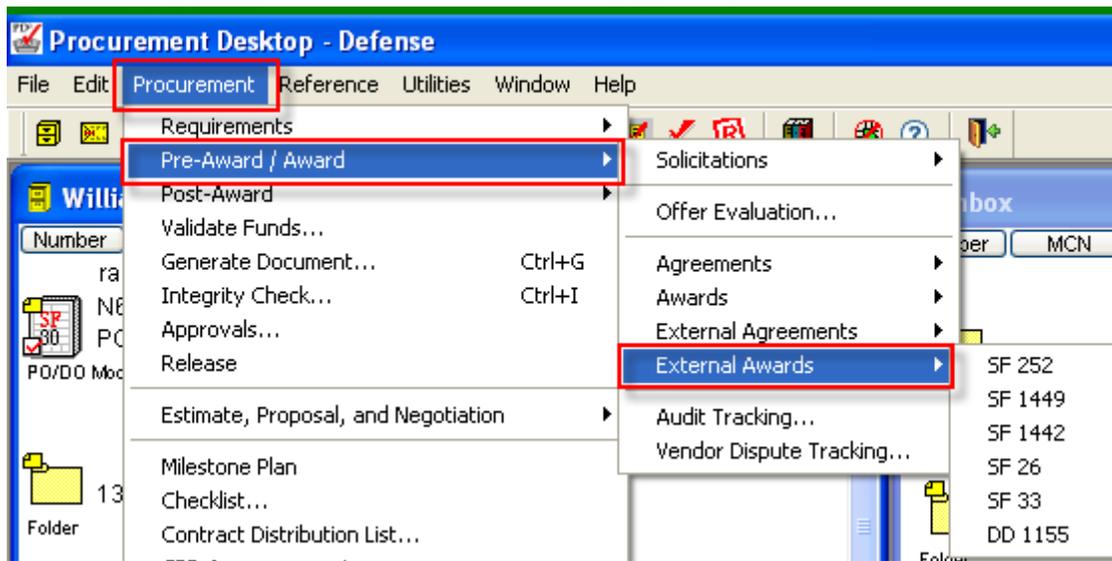
c. Vendor Points of Contact

	Program Manager (PM)	PM Alternate	Contracts Management	Sales & Ordering
POC	Kent Smith	Stephen Shanks	Loik Henderson	Chuck Homan
Telephone	703-624-7030	703-915-4084	703-673-7892	704-604-3759
Email	kentsmi@microsoft.com	stephen.shanks@microsoft.com	loiheh@microsoft.com	choma@microsoft.com

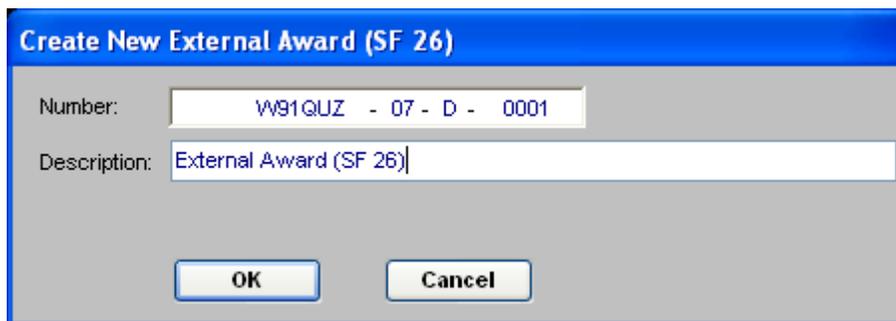
7. External Award / Agreement (for use in the Standard Procurement System (SPS))

IDIQ contracts awarded by other contracting offices can be entered in the system as external awards. External awards allow users to enter line item information and establish order constraints consistent with the original award. Once an external award is loaded in the system, it can be used as a reference when creating orders.

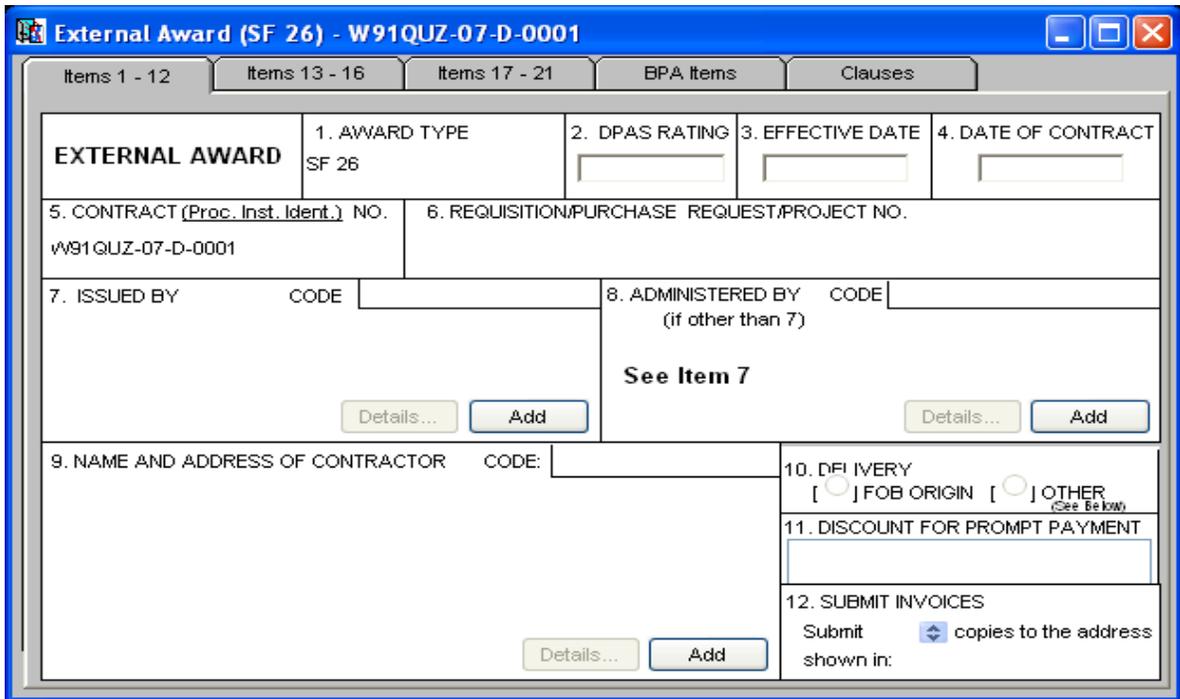
To create an external award, go to Procurement > Pre-Award / Award > External Awards (or Agreements) > select the desired form.



The Create New External Award window displays.



Enter the Agreement number for which the external award is being created. Click OK. The external award document is opened and displayed.



Items 1 - 12		Items 13 - 16		Items 17 - 21		BPA Items		Clauses	
EXTERNAL AWARD		1. AWARD TYPE SF 26	2. DPAS RATING []	3. EFFECTIVE DATE []	4. DATE OF CONTRACT []				
5. CONTRACT (Proc. Inst. Ident.) NO. W91QUZ-07-D-0001			6. REQUISITION/PURCHASE REQUEST/PROJECT NO.						
7. ISSUED BY CODE		[]		8. ADMINISTERED BY CODE (if other than 7)		[]			
		See Item 7							
9. NAME AND ADDRESS OF CONTRACTOR CODE:		[]		10. DELIVERY [] FOB ORIGIN [] OTHER <small>(See Below)</small>					
				11. DISCOUNT FOR PROMPT PAYMENT []					
				12. SUBMIT INVOICES Submit [] copies to the address shown in:					

Enter all relevant information on the tabs to replicate the award that the external award is representing. You must create CLINs for external awards in order to issue orders off of those CLINs. Agreements do not utilize CLINs. It is not necessary to replicate clauses.

When complete, simply approve the external award. This document type is not run through funds validation, not generated, and not released.