

**Department of Defense (DoD)
Enterprise Software Initiative (ESI)
Enterprise Software Agreement (ESA)
BPA Number: FA8771-06-A-0302**

User's Ordering Guide



Notice to Air Force Ordering Offices: Per AF CIO policy 04-12 dated 27 Sep 04, AF customers may only use the standard AF Enterprise Information Management (EIM) solution for meeting Enterprise Content Management requirements. Air Force customers are prohibited from purchasing TOWER Software products to include purchases under this DoD ESI agreement.



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ESI BPA Background

A Blanket Purchase Agreement (BPA) has been established with TOWER Software ("TOWER") responding to the DoD's Electronic Document and Records Management (EDRM) requirements. The BPA provides for the procurement of TOWER's TRIM Context ("TRIM") EDRM software platform and the following types of services for TRIM software implementations:

- Configuration
- Integration
- Installation
- Data Conversion
- Training
- Testing
- Object Development
- Interface Development
- Business Process Reengineering
- Project Management
- Risk Management
- Quality Assurance
- Other Professional Services

DoD activities, components, and programs will be able to capitalize on the cumulative buying power of and the best practices available through the BPA to acquire TRIM Software and implementation/integration services. To enhance project execution and better align performance expectations, TOWER has defined the duties of the customer in more detail and established acceptance criteria. TOWER has also provided a detailed description of the TOWER Delivery Methodology for TRIM.

More information on ESI can be found at <http://www.esi.mil>

TOWER's BPA and attachments can be obtained at:

<https://ossg.gunter.af.mil/aq/contracts/contractinfo.aspx?ID=728>

Attachments to the BPA are:

1. ATTACHMENT 1 - ESA PRICING
2. ATTACHMENT 2 - TOWER SOFTWARE SUPPORT & LICENSE AGREEMENT



BPA Points of Contact – Government

| CONTRACTING OFFICE | |
|---|--|
| Primary | Alternate |
| DEPARTMENT OF THE AIR FORCE HQ OSSG/KA 490 EAST MOORE DR., SUITE 270 MAFB - GUNTER ANNEX AL 36114-3000 JOHN R. BUZAN 334-416-4229 John.Buzan@Gunter.AF.Mil | DEPARTMENT OF THE AIR FORCE HQ OSSG/KA 490 EAST MOORE DR., SUITE 270 MAFB - GUNTER ANNEX AL 36114-3000 Dawn Sewell 334-416-1405 Dawn.Sewell@Gunter.AF.Mil |

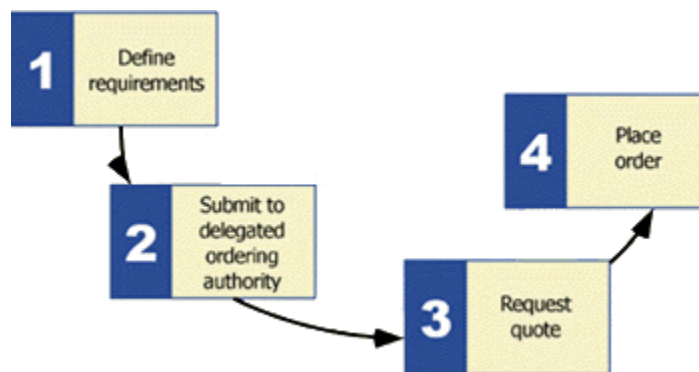
BPA Points of Contact – TOWER

TOWER's main point of contact for inquiries regarding ordering TRIM or TRIM services through the ESI BPA is:

| DOD ESI Contracts Point of Contact | | |
|------------------------------------|-----------------------|--|
| Name | Title | Contact |
| Mr. Dana Barnes | DoD Account Executive | Phone – 703.547.5947 Fax – 703.437.9006 Email – dana.barnes@towersoft.com |

Ordering Process

The Order Process describes the simple steps involved in placing an order.



Echoing commercial practice, the BPA process permits and encourages significant dialog between the BPA Holder (TOWER Software) and the DoD customer prior to order placement. This type of interaction enables requirements to be refined prior to ordering the software and services. It also gives the customer an opportunity to discover and incorporate emerging technology in order requirements.



The following table lists specific tasks involved in the order process. The individual with principal responsibility for each task is coded with a P. The individual with support responsibility is coded with an S.

| | Order Placement Tasks | TOWER | DoD Project Manager | Ordering Authority | Finance Office |
|---|---|-------|---------------------|--------------------|----------------|
| 1 | Define requirements | S | P | | |
| 2 | Secure funding commitment | | S | | P |
| 3 | Prepare and issue request for quotation (RFQ) | | S | P | |
| 4 | Submit quotation | P | | S | |
| 5 | Issue purchase order | | S | P | |

- Define requirements. Identify objectives and desired outcomes of the planned engineering or technical services. Resolve as list of requirements. Principal responsibility of DoD Project Manager. TOWER interaction is permitted and encouraged.
- Secure funding commitment. Affirm availability of appropriate funds to support order.
- Submit quotation. TOWER responds electronically in five business days with a price quote. This is the. Principal responsibility of TOWER Software. Coordination with Ordering Agency may be required and is permissible for clarification of RFQ requirements.
- Issue purchase order. Place formal order with TOWER Software. Transmit order electronically (E-mail) and/or via hard copy means. Also notify TOWER Software telephonically. Principal responsibility of Ordering Authority. Coordinate with Government Project Manager as appropriate.

Task/Delivery Orders

The scope of this effort is worldwide. Delivery requirements will be stipulated on Task/Delivery Orders. Sample tasks and templates may be found at <http://deskbook.dau.mil> Ordering via this BPA is decentralized. Orders are prepared by a Government Ordering Officer (a duly warranted Contracting Officer whose warrant authorizes purchases from the GSA Schedule), in accordance with the terms and conditions of this BPA and the GSA Schedule. Orders may be placed by EDI, credit card, facsimile, on an authorized form such as a Standard Form (SF) 1449 or Department of Defense (DD) Form 1155.

Security

Any specific security requirements will be addressed in the task orders/delivery orders placed against this BPA.



Other Direct Costs (ODCs)

ODCs consist of materials, hardware, and software that are not priced in the BPA Schedule. Such items may only be added to BPA orders for administrative convenience based on the ordering-office contracting officer's compliance with applicable regulations.

Requirements that include software as an ODC must consider the use of DoD Enterprise Software Agreements in accordance with DFARS 208.7400.

1. **GSA Schedule Items.** ODCs could consist of materials, hardware, and software that are listed on other GSA Schedule contracts of TOWER's Partners. The Ordering Office retains the responsibility for compliance with FAR 8.404 requirements.
2. **Open Market Items.** ODCs could consist of materials, hardware, and software that are not on a Federal Supply Schedule contract. An ordering activity contracting officer may add open market items to a Federal Supply Schedule blanket purchase agreement (BPA) or an individual task or delivery order in accordance with FAR 8,401(d), only if:
 - a) All applicable acquisition regulations pertaining to the purchase of the items not on the Federal Supply Schedule have been followed (e.g., publicizing (Part 5), competition requirements (Part 6), acquisition of commercial items (Part 12), contracting methods (Parts 13, 14, and 15), and small business programs (Part 19))
 - b) The ordering activity contracting officer has determined the price for the items not on the Federal Supply Schedule is fair and reasonable
 - c) The items are clearly labeled on the order as items not on the Federal Supply Schedule; and
 - d) All clauses applicable to items not on the Federal Supply Schedule are included in the order

Travel

Travel will be reimbursed at cost in accordance with the Joint Travel Regulation (JTR) rate in effect at the time of travel. These can be found at the JTR web site: <http://www.dtic.mil/perdiem/trvlregs.html>. No profit or fee will be paid on travel.

Information Necessary to Complete a DD350

The following information is provided to Contracting Officers to assist them in preparing the DD Form 350 (Individual Contracting Action Report) and other related acquisition documentation.



Contractor:

TOWER Software
12012 Sunset Hills Rd
Suite 510
Reston, VA 20190

BPA Number: FA8771-06-0302

GSA Schedule: GSA Schedule 70 Contract GS-35F-4788H.

Award Date: 6 December 2005, under Federal Schedule

Expiration Date: 6 December 2010 (Five-Years)

Estimated Value: \$34,000,000

DUNS No.: 838020311

CAGE Code: 1LLC2

NAICS Codes: 334611; 541512; 541519

Links to DoD ESI Website and Government Website

For additional information go to the DoD ESI website:

www.esi.mil