

## Notice of Intent to Certify Sole Source

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**To:** Interested Parties  
**From:** Craig P. Orgeron, Ph.D.  
**Date:** May 29, 2018  
**RE:** Sole Source Certification Number 4104 to acquire EPI-USE Customer Relationship Management (CRM), Supplier Relationship Management (SRM), and Business Warehouse (BW) Modules for the Mississippi Department of Finance and Administration  
**Contact Name:** Jamekia Hilliard  
**Contact Phone Number:** 601-432-8219  
**Contact E-mail Address:** Jamekia.Hilliard@its.ms.gov

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### Sole Source Certification Award Details

Regarding Information Technology Services (ITS) Sole Source Certification Number 4104 for the acquisition of EPI-USE Customer Relationship Management (CRM), Supplier Relationship Management (SRM), and Business Warehouse (BW) Modules for the Mississippi Department of Finance and Administration (DFA), please be advised that ITS intends to award to EPI-USE Labs as the sole source provider of the EPI-USE CRM, SRM, and BW Modules through February 18, 2021, in an amount not-to-exceed \$322,983.00, and for future modules that may be needed during the certification period. For an explanation regarding Mississippi state law, policies, and procedures for sole source procurements, refer to Attachment C: Sole Source Procurement Overview.

### Sole Source Criteria

1. The product or services being purchased must perform a function for which no other product or source of services exist:  
**As a part of a previous competitive procurement, DFA already owns the Enterprise Resource Planning Central Component (ECC) and Human Capital Management (HCM) modules of the EPI-USE Labs software, and they are fully integrated into the suite of EPI-USE suite of products. Adding the CRM, SRM, and BW EPI-USE modules will allow DFA the ability to seamlessly move data for the SRM, CRM, and BW modules as they currently do for the ECC and HCM modules. The infrastructure is already in place to add these modules. The customer's sole source certification request is included as Attachment A.**
2. The purchaser must be able to show specific business objectives that can be met only through the unique product or services:



DFA is responsible for maintaining the Mississippi Accountability System for Government Information and Collaboration (MAGIC). MAGIC is used by all state agencies to process their core financial, procurement, grants management, and data warehouse activities. There are times when data needs to be moved between the different environments for testing and/or training. The EPI-USE Labs software provides the ability to easily move the interrelated data while ensuring it remains scrambled and confidential. DFA has had tremendous success with the already purchased ECC and HCM modules. The CRM, SRM, and BW modules are needed to provide the ability to move and scramble the data for those areas of MAGIC. The customer's sole source certification request is included as Attachment A.

3. The product or services must be available only from the manufacturer and not through resellers who could submit competitive pricing for the product or services:

**EPI-USE Labs does not currently offer their Data Sync Manager Product Suite (Client Sync, Object-Sync, and Data Security & System Builder) for purchase through any reseller or partner in the United States. The only way U.S. based organizations can purchase Data Sync Manager licenses and related support and maintenance plans is through a direct transaction with EPI-USE Labs. The vendor's sole source certification letter is included as Attachment B.**

#### **Schedule**

Task	Date
First Advertisement Date	05/29/18
Second Advertisement Date	06/05/18
Response Deadline From Objectors	06/12/18, at 3:00 P.M. Central Time
Notice of Award/No Award Posted	06/13/18

#### **Project Details**

ITS issued RFP No. 3598 on behalf of DFA in December 2009, for the acquisition of Enterprise Resource Planning (ERP) software where SAP Public Services, Inc. was the awarded vendor. SAP Public Services, Inc. was also the awarded vendor for RFP No. 3626 for the acquisition of services for configuring, integrating, and implementing the ERP Software. EPI-USE Labs ECC and HCM modules are part of that ERP solution. The software licenses have been transferred from SAP to DFA through the execution of an End User License Agreement with EPI-USE. Expenditures to date total \$195,143.50. DFA has made a business decision to acquire the CRM, SRM, and BW modules from EPI-USE.

#### **Submission Instructions and Format of Response from Objecting Parties**

Interested parties who have reason to believe that the CRM, SRM, and BW Modules of EPI-USE Labs Software should not be certified as a sole source should provide information in the following format for the state to use in determining whether or not to proceed with awarding the Sole Source contract with EPI-USE Labs.

##### **1.1 Interested Party Information**

###### **1.1.1 Contact Name, Phone Number and email address**

- 1.1.2 Company Website URL, if applicable
- 1.2 Objection to Sole Source Certification
  - 1.2.1 Interested parties must present specific objections to the Sole Source certification using the criteria listed above.
  - 1.2.2 A statement regarding the Interested Party's capabilities as related to this Sole Source Certification Request.
- 1.3 Comments will be accepted at any time prior to Tuesday, June 12, 2018, at 3:00 p.m. (Central Time) to Jamekia Hilliard at [Jamekia.Hilliard@its.ms.gov](mailto:Jamekia.Hilliard@its.ms.gov) or at the Mississippi Department of Information Technology Services, 3771 Eastwood Drive, Jackson, Mississippi 39211. Responses may be delivered by hand, via regular mail, overnight delivery, e-mail, or by fax. Fax number is (601) 713-6380. ITS WILL NOT BE RESPONSIBLE FOR DELAYS IN THE DELIVERY OF RESPONSES. It is solely the responsibility of the Interested Parties that responses reach ITS on time. Interested Parties may contact Jamekia Hilliard to verify the receipt of their Responses. Responses received after the deadline will be rejected.
- 1.4 Interested Party responses should include the following information:

**SUBMITTED IN RESPONSE TO  
Sole Source Certification No. 4104-44314  
Accepted until June 12, 2018 @ 3:00 p.m.,  
ATTENTION: Jamekia Hilliard**

If you have any questions concerning the information above or if we can be of further assistance, please contact Jamekia Hilliard at 601-432-8219 or via email at [Jamekia.Hilliard@its.ms.gov](mailto:Jamekia.Hilliard@its.ms.gov).

Attachment A: Customer Sole Source Certification Request  
Attachment B: Vendor Correspondence  
Attachment C: Sole Source Procurement Overview



## Sole Source Certification Request

<b>Project Title: CRM &amp; SRM Modules of EPI-USE Labs Software</b>			<b>Stimulus (ARRA) Funds? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></b>	
<b>Customer Contact Information</b>				
<b>Agency/Public University: MS Dept. of Finance &amp; Admin.</b> <b>Address: 301 North Lamar Street; Suite 400; Jackson, Mississippi 39201</b>		<b>Contact Person: Becky Thompson</b> <b>Phone: 601-359-5136</b> <b>Fax: 601-359-6551</b> <b>Email Address: becky.thompson@dfa.ms.gov</b>		
<b>MAGIC Customer Number (only required from state agencies):</b> 7000000073		<b>Division/Dept.:</b> <b>Handmail: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</b>		
<b>Project Summary Narrative Description of Project</b> (include details of original acquisition if applicable): As part of the MAGIC implementation, the Enterprise Central Component (ECC) and Human Capital Management (HCM) modules of the EPI-USE Labs software were purchased and implemented. The ECC module of SAP is used to process the financial components of MAGIC. The HCM module is for the human resource mini-master component of MAGIC. The EPI-USE Labs software is used to scramble sensitive information and eliminate discrepancies associated with MAGIC data. The software is also used to easily move data between the different system environments (development, testing, training, and production). MAGIC is comprised of many tables that are all inner related and tied together. The EPI-USE Labs software provides the ability for a subset of identified data to be easily moved between environments rather than having to move all the data in a database. In doing this, DFA has been able to greatly reduce the amount of storage that is needed in the different environments. It has also reduced the amount of time needed to setup the various environments for functional testing.  DFA needs to purchase the Customer Relationship Management (CRM), Supplier Relationship Management (SRM), and Business Warehouse (BW) modules of the EPI-USE Labs software. The CRM module is used to process the State's grants management activities. The SRM module is used to process the State's procurement activities.				
<b>ITS Acquisition Approval (CP-1) should be effective through this date</b> (Please allow time for all vendor invoices to be paid):				
<b>Cost Estimates Fiscal Year</b>	<b>Initial Costs</b>	<b>Ongoing Costs</b>	<b>Time Constraints</b> Item Needed by: July 1, 2018 Funds Expire: FY basis	<b>Anticipated Lifecycle of Products/System</b> (i.e. estimated years of effective use): 3 years (initially)
FY2019 (CRM & SRM license)	\$110,000.00		<b>Discuss Funding</b> (e.g. how much of needed funding is definite; total project budget; any matching or other non-state funds)  The license fee, implementation, and training cost are one-time cost. The maintenance cost will be paid on an annual basis. Payment is 100% general funds.	
FY2019 (BW license)-optional	\$110,000.00			
FY2019		\$13,860.00		
FY2020		\$13,860.00		
FY2021 (maintenance)		\$8,778.00		
FY2019		\$10,800.00		
FY2020		\$10,800.00		
FY2021 (BW maintenance)-optional		\$6,840.00		
Implementation and Training Cost	\$19,000.00			
BW Implementation and Training Cost-optional	\$19,000.00			
<b>Total</b>	<b>\$258,000.00</b>	<b>\$64,983.00</b>		
<b>Acquisition Details</b>				
<b>Items Requested</b>	<b>Quantity</b>	<b>Description</b>	<b>Building Location(s)</b>	
Client Sync for CRM	One (1)	License to the CRM module of EPI-USE	DFA staff: Robert G. Clark Building; MAGIC system: ITS Data Center	
Client Sync for SRM	One (1)	License to the SRM module of EPI-USE	DFA staff: Robert G. Clark Building; MAGIC system: ITS Data Center	
Client Sync for BW (optional)	One (1)	License to the BW module of EPI-USE	DFA staff: Robert G. Clark Building; MAGIC system: ITS Data Center	
Maintenance Cost	Three (3)	Three years of maintenance for both the CRM and SRM modules	DFA staff: Robert G. Clark Building; MAGIC system: ITS Data Center	
BW Maintenance Cost- optional	Three (3)	Three years of maintenance for both the CRM and SRM modules	DFA staff: Robert G. Clark Building; MAGIC system: ITS Data Center	
Implementation and Training Cost for CRM and SRM Modules	One (1)	Implementation and Training Cost for both the CRM and SRM modules	DFA staff: Robert G. Clark Building; MAGIC system: ITS Data Center	
Implementation and Training Cost for BW Module (optional)	One (1)	Implementation and Training Cost for the BW module	DFA staff: Robert G. Clark Building; MAGIC system: ITS Data Center	
<b>Describe platform &amp; infrastructure</b> (connectivity; software/hardware platforms; utilization of State Data Center resources: mainframe, government portal, payment engine, document management, hosting). For equipment or hosting outside the State Data Center, attach justification:				



# Attachment A

MAGIC is hosted in the State Data Center.	
<b>Progress to Date:</b> What has been done related to this project, including any communication with ITS staff (data/voice/procurement/other)? The sole source certification request was submitted to ITS.	
<b>Sole Source Certification</b> Note: Certification must be renewed for each revision or continuation of previous Sole Source Approvals.	
<b>Specific business requirements to be met by the requested products or services:</b> DFA is responsible for maintaining the Mississippi Accountability System for Government Information and Collaboration (MAGIC). MAGIC is used by all state agencies to process their core financial, procurement, grants management, and data warehouse activities. There are times when data needs to be moved between the different environments for testing and/or training. The EPI-USE Labs software provides the ability to easily move the interrelated data while ensuring it remains scrambled and confidential. DFA has had tremendous success with the already purchased ECC and HCM modules. The CRM, SRM, and BW modules are needed to provide the ability to move and scramble the data for those areas of MAGIC.	
<b>Explain why these products or services are the only ones that can meet your needs</b> (include unique features/special functionality): As a part of a previous competitive procurement, DFA already owns the Enterprise Resource Planning Central Component (ECC) and Human Capital Management (HCM) modules of the EPI-USE Labs software and are fully integrated into the suite of EPI-USE suite of products. Adding the CRM, SRM, and BW EPI-USE modules will allow DFA the ability to seamlessly move data for the SRM, CRM, and BW modules as they currently do for the ECC and HCM modules. The infrastructure is already in place to add these modules.	
<b>Explain why the source is the only entity that can provide the products or services</b> (Include other products/vendors researched or evaluated): EPI-USE Labs does not currently offer their Data Sync Manager Product Suite (Client Sync, Object-Sync, and Data Security & System Builder) for purchase through any reseller or partner in the United States. The only way U.S. based organizations can purchase Data Sync Manager licenses and related support and maintenance plans is through a direct transaction with EPI- USE Labs.	
<b>Vendor's Certification of Sole Source attached:</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <b>Vendor's proposal submitted:</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
<b>MAGIC Vendor Code(s)</b> Vendor must be in MAGIC before a CP-1 can be issued.	
<b>Place Order To</b> <b>Vendor Name:</b> EPI-USE Labs <b>Vendor Address:</b> 2002 Summit Blvd, Suite 825 <b>Atlanta, GA 30319</b>	<b>Remit To</b> <b>Vendor Name:</b> EPI-USE Labs <b>Vendor Address:</b> 2002 Summit Blvd, Suite 825, <b>Atlanta, GA 30319</b>

By my signature, I certify that, to the best of my professional knowledge: the requested product or services are a sole source as outlined in the ITS Procurement Handbook, Rule 207.2:013-030 Procurement Types: Sole Source, and as outlined in Mississippi Code annotated Section 31-7-13. In addition, I acknowledge that there is a charge for ITS procurement services associated with this request, which will be, billed to the requestor by ITS and that my agency/public university is responsible for these charges/costs.

Laura Jackson - Executive Director

Name (Agency Head or Public University CIO)/Title

Laura Jackson 5/29/18

Signature

Date

28 February 2018

Department of Finance and Administration  
State of Mississippi  
301 North Lamar Street: Suite 400  
Jackson, MS 39201

Dear Madam or Sir:

I am writing this letter, at your request, to acknowledge that EPI-USE Labs does not currently offer its Data Sync Manager product suite (Client Sync, Object Sync, Data Secure & System Builder) for purchase through any reseller or partner in the United States.

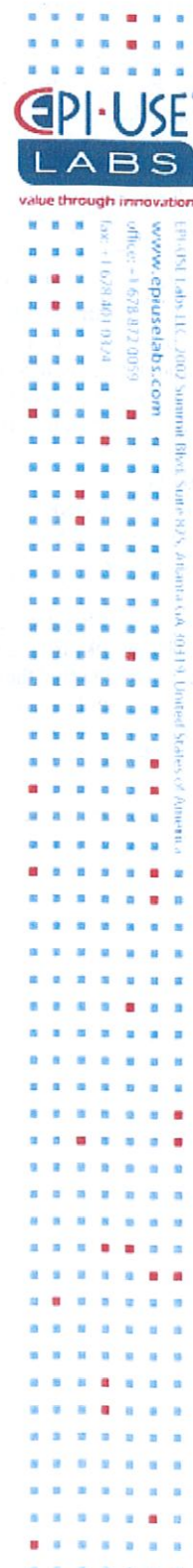
The only way in which U.S.-based organizations can purchase Data Sync Manager licenses and related support & maintenance plans is through a direct transaction with EPI-USE Labs.

If you have any questions about this, or if I can be of assistance in other way, please do not hesitate to contact me.

Best regards



Paul Snyman  
SVP, Americas  
EPI-USE Labs  
[pauls@labs.epiuse.com](mailto:pauls@labs.epiuse.com)  
(415) 342-9722





The acquisition of information technology for all state agencies and institutions of higher learning (IHLs) is within the scope of the ITS law, found in Mississippi Code Section 25-53-1, et seq., and the policies and procedures established in accordance with this statute, found in the ITS Procurement Handbook posted on the ITS website ([www.its.ms.gov](http://www.its.ms.gov)).

ITS enabling legislation requires that information technology hardware, software and services be acquired in a manner that insures the maximum of competition among all manufacturers and suppliers of such equipment and services. Accordingly, ITS promotes full and open competition through the issuance of open specifications and the objective evaluation of Interested Party proposals to determine the lowest and best offering to meet an agency's or public university's business requirements. True competition protects the integrity and credibility of purchasing in the public sector and is essential in providing best value and adequate contractual protection for the purchasing entity. In certain limited situations, information technology acquisitions may be sole-sourced.

ITS utilizes the provisions of Public Purchasing Law for Sole Source and Emergency procurements of information technology. Mississippi Public Purchasing Law (Mississippi Code Section 31-7-13) specifies that noncompetitive items available from one source only be exempted from bid requirements (sole-sourced). ITS statute, in Section 25-53-5 (p), permits ITS to utilize provisions in Public Purchasing Law or regulations, when applicable.

Per Public Purchasing law, acquisitions must meet the following criteria to be authorized as sole source:

1. The product or services being purchased must perform a function for which no other product or source of services exists,
2. The purchaser must be able to show specific business objectives that can be met only through the unique product or services, AND
3. The product or services must be available only from the manufacturer and NOT through resellers who could submit competitive pricing for the product or services. The vendor's correspondence regarding this criterion for this project is included as Attachment B.

By policy as documented in the ITS Procurement Handbook, acquisitions of IT services must include the following information to be authorized as sole source:

1. An explanation about why the amount to be expended is reasonable, and
2. An explanation regarding the efforts by the purchaser to obtain the best possible price.

For state agencies, approval of all technology purchases with a lifecycle cost of \$5,000 or less, including sole source purchases, has been delegated to the agency. The ITS Procurement Limits Policies for Agencies (a section in the ITS Procurement Handbook) require a minimum of two competitive written bids or proposals for technology purchases with a lifecycle cost over \$5,000 but not over \$50,000 (not over \$25,000 for projects funded by the American Recovery and Reinvestment Act). Since, for single source items, the procuring agency will be unable to obtain two written bids, ITS must certify all sole source acquisitions of information technology with a lifecycle cost greater than \$5,000.

Institutions of Higher Learning (IHLs) or public universities have been delegated the authority to certify sole source procurements up to \$250,000 lifecycle cost under the ITS Procurement Limits Policies for IHLs (a section in the ITS Procurement Handbook). For the certification of sole source procurements delegated to the CIOs at public universities, the public university must follow ITS' Sole Source Procedure, including advertisement of the intent to award as sole source. Institutions certifying a sole source purchase must ensure the criteria listed above are met and documented in writing by the institution and the Interested Party prior to certifying a product or service as sole source. Sole source

documentation must be reviewed and approved by the IHL's CIO for any sole-source certification above \$5,000. All sole source documentation should be retained in the public university's procurement file. Sole source requests above \$250,000 lifecycle cost require ITS approval.

Other than the delegations outlined above, all sole source technology procurements must be certified by ITS. The customer's Sole Source Certification Request for this project is included as Attachment A.

ITS thoroughly reviews Sole Source Certification Requests, determining if competing products and/or services exist. If so, ITS conducts a competitive procurement. If ITS' review confirms the sole source, then a Sole Source advertisement is issued, giving other Interested Parties an opportunity to identify competing products and/or services. Based upon the results of the Sole Source advertisement, ITS will either certify the request as a sole source or conduct a competitive procurement.