



# Offeror Questionnaire – Methodology

Description: **WSCA Software Value-Added Reseller**

## STATE OF ARIZONA

Agency: **Arizona Dept. of Administration  
State Procurement Office (ADOA/SPO)**  
Customer: **WSCA participating states; AZ Statewide  
(state agencies & cooperative partners)**  
Response Provided By: **JAMES GROUP**

**Instructions:** Complete each item, using attachments where necessary. Attachments shall indicate the item number and heading being referenced as it appears below. Label your response "Questionnaire-Methodology-*companyname*" and indicate each question number as it is being addressed. Your narrative response is limited to twenty-five (25) pages, 8.5" x11", with one-inch margins and no smaller than Times New Roman number 12 or Ariel 9 font. Attachments are not included as part of this total. All materials must be in electronic format that can be received by ProcureAZ, the State of Arizona's electronic procurement system (see Special Instructions.) **ANY NARRATIVE LANGUAGE RECEIVED IN EXCESS OF THE PAGE QUANTITY INDICATED WILL NOT BE CONSIDERED AS PART OF THE PROPOSAL.**

## METHODOLOGY

1. Assume you recently received a contract as the sole Software Value-Added Reseller in a State (serving that State and its cooperative partners). Further assume: the State has multiple state agencies and multiple municipalities using that State's contract; the State and cooperative partners have separate volume license agreements and existing perpetual licenses; the State has an existing contract with a personal computer (hardware) provider which provides equipment already loaded with basic distributed software products.
  - DESCRIBE the actions you would take to establish yourself as that State's SVAR, with the central procurement office, and with individual using entities (e.g., a state agency and a coop partner such as a city).
  - DESCRIBE how those actions may be modified if your contract were the first SVAR contract for that State.
  - DESCRIBE your outreach to State and Cooperative Partner users.

### Contract Scenario

The James Group was awarded the Master Contract for Oracle technology, middleware, support, and training in 2010. Before entities in Illinois could utilize the contract, it was our responsibility to educate and inform them on contract parameters and the process by which they can purchase. The James Group's upper management and account team started by contacting the significant personnel within the agencies to inform them of the contract award, either via telephone, e-mail, or face-to-face introductions. We also worked with the Illinois Central Management (Procurement) office to ensure our listing amongst all other state contracts. After the initial announcements and introductions are completed, The James Group would remain a resource to customers to guide them through the purchasing process. Should a state or entity need extra guidance in establishing or utilizing a new contract, The James Group will take whatever means necessary to add value to such a contract.

2. Contractor is required to provide a website for each participating state. Describe the website you would establish for a State and that website's functionalities or special features. You can supplement this response with illustrative page shots (no more than 10) from one of your existing websites. Please address, at a minimum:
  - Home page appearance and information
  - On line tutorials
  - Product catalog (include searchable fields, which products you would include, how VLA information is provided)
  - Links
  - Downloadable standard reports, if any. Include how information is controlled and sorted (e.g., how can Tempe, AZ obtain only their information, how can Procurement Officer of contract obtain a purchasing profile for users and volume in State).
  - How website is monitored, kept current and accurate

### Website Overview

The TJG Licensing System has the ability to track all software assets and maintenance contracts purchased by any of the WSCA participating states – this includes tracking the associated support and nature and number of support / Help Desk services. WSCA will have the ability to produce ad hoc reports to track software assets and maintenance by participating state. Multilevel security is built in to the system that grant access to only the data the user is entitled to see to prevent users from obtaining access to information which they lack authorization.

WSCA will have the ability to create custom Ad-hoc reports and download to a CSV file for further reporting. TJG is can work with WSCA and any participating state to meet their reporting needs.

WSCA Participating Entities can rest assure that the website is monitored and kept current and accurate since it is the same website that we use to track our current customer licensing information for new products and ongoing software support renewals.



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Below is a brief overview of the flow of our Licensing System along with screen prints.

User Name:   
Password:    
Welcome to the OARnet Product License Management System

Login Screen can be customized to include PE name and logo.

**Customer List**

Search:  Display:

Search customers by partial name, or any of their defined contacts by partial name. Case-insensitive.

Customer List

View	Edit	Enter Order	Customer Type	Customer Name	Category	Customer Status	Parent Customer Name
Details	Edit		Primary	AGCO	Other	Active	
Details	Edit	Enter Order	Sub	AGCO - Martoberdorf, Germany	Other	Active	AGCO
Details	Edit	Enter Order	Sub	AGCO - Stoneleigh, UK	Other	Active	AGCO
Details	Edit	Enter Order	Sub	AGCO - USA Primary Office	Other	Active	AGCO

CSV

Standard Navigation

You have the ability to Enter a Prime Customer with Sub Customers for affiliate offices.

Customer Details

Customer Name **AGCO - Martoberdorf, Germany**  
Customer Status **Active**  
Customer Type **Sub**  
Parent Customer **AGCO**

Customer Orders

Detail	Date Ordered	Invoice #	Po #	License Fees	Maintenance Fees	Vendor/Partner	Sales Rep Name
Detail	10/01/2010	-	-	\$27,200.00	\$5,984.00	-	-
Detail	10/01/2010	-	-	\$129,200.00	\$28,424.00	-	-

Customer Contacts

No customer contacts found

Customer Licenses

History	Manufacturer	Product	License Status	License Desc	License Qty	Date Assigned	Maintenance Paid Thru	License Unit Price	License Ext Price	Maintenance Unit Price	Maintenance Ext Price	Date Revoked
History	Oracle	Enterprise Edition - Oracle Database Processor - Perpetual	Active	XXX-123	4	10/01/2010	-	\$32,300.00	\$129,200.00	\$7,106.00	\$28,424.00	-
History	Oracle	Oracle Diagnostics PK - Processor	Active	XXX-123	8	10/01/2010	-	\$3,400.00	\$27,200.00	\$748.00	\$5,984.00	-

Customer Notes

No customer notes found

Ability to view current and past orders.



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Customer Details

Customer Name **AGCO - Stoneleigh, UK**  
Customer Status **Active**  
Customer Type **Sub**  
Parent Customer **AGCO**

[Edit Customer Details](#) [Create Order](#)

Customer Orders

Detail	Date Ordered	Invoice #	Po #	License Fees	Maintenance Fees	Vendor/Partner	Sales Rep Name
Detail	10/01/2010	-	-	\$27,200.00	\$5,984.00	-	-
Detail	10/01/2010	-	-	\$129,200.00	\$28,424.00	-	-

1 - 2

Customer Contacts

No customer contacts found  
[Create New Contact](#)

Customer Licenses

History	Manufacturer	Product	License Status	License Desc	License Qty	Date Assigned	Maintenance Paid Thru	License Unit Price	License Ext Price	Maintenance Unit Price	Maintenance Ext Price	Date Revoked
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1 - 2

CSV  
[Modify Customer Licenses](#) [Email Customer Licenses](#)

Customer Notes

No customer notes found  
[Add Customer Note](#)

Ability to view current and past orders.

Customer License Report

Main Navigation  
• Home  
• Customers  
• Create Customer  
• Products  
• Manufacturers

Reports  
• Customer Licenses  
• Customer Orders

Customer License Report

Rows: 15 Go

Customer License Status	License Qty	License Unit Price	Date Assigned	Date Assigned
Active	8	748	10/01/2010	10/01/2010
Active	8	748	10/01/2010	10/01/2010
Active	4	7106	10/01/2010	10/01/2010
Active	4	7106	10/01/2010	10/01/2010

Select Columns  
Filter  
Sort  
Control Break  
Highlight  
Compute  
Aggregate  
Chart  
Flashback  
Save Report  
Reset  
Help  
Download

Reporting:

- The ability to pull the standard Customer License Report
- The ability to pull the standard Customer Orders Report
- The ability to create Ad-Hoc Reports



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Description: **WSCA Software Value-Added Reseller**

3. Describe your method for tracking software licenses and ensuring that Participating Entities (PE) receive timely notifications of renewals or are advised of volume agreements opportunities or vulnerabilities, etc. Please address, at a minimum:
- The standard sort-able data fields you establish for these records
  - The information you track on behalf of Participating Entities.
  - How reminders of significant dates or volume plateaus are triggered and how your organization, as a partner with a PE, works with the PE to ensure no deadlines are missed or opportunities unexplored.

### Software Tracking Method

As a reseller with multiple state contract awards, The James Group is adept in assisting customers renew their Oracle support in an efficient and cost-effective manner. We work in tandem with our Oracle counterparts in preparing a renewal quote that allows the customer time to budget for the upcoming support cost and move the purchase requisition through their internal procurement systems. Usually, the customer can expect a software support estimate 3 months in advance of the upcoming expiration/renewal date. In terms of sort-able data, The James Group uses Oracle's Customer Support Identifier (CSI), Support Contract number, and Support Renewal date to track and sort this information. By sorting customer renewals by date, The James Group ensures that the aforementioned 3-month notice is given to customers, allowing time for purchase order processing.

The James Group's database base of customers and their corresponding installation base of Oracle licenses allow us to track not only the expiration of support, but allow us to make specific recommendations on increasing the efficiency of a customer's environment. By analyzing license metrics and quantities while understanding the customer's business objectives and available resources, The James Group is able to make specific recommendations. Our customers can rest assured that they have the correct licenses, the correct quantities, and that they are not spending money on licenses they don't need. This process follows any software we sell to our customers.

4. Describe standard reports which you can generate for a PE (other than downloadable reports addressed earlier) and provide sample reports as examples. Describe and provide examples of Optional Reports which you could provide and provide pricing in the Offeror – Pricing attachment.

### Optional Reports

Besides the standard reports supplied more power lies in the interactive reports. Interactive reports are exactly what they sound like: interactive. They allow the user the ability to represent and manipulate all the data presented in many different ways. Just a few of the ways in which an interactive report can be customized is controlling which columns are shown, the order of the columns shown, filtering the rows that are shown, adding control breaks, adding derived columns, and many more. Below are screen shots of an example interactive report are below:

Interactive Report

	Customer Id	Cust First Name	Cust Last Name	Cust Street Address1	Cust Street Address2	Cust City	Cust State	Cust Postal Code	Phone Number1	Phone Number2	Credit Limit	Cust Email
	1	John	Dulles	45020 Aviation Drive	-	Sterling	VA	20186	703-555-2143	-	1000	-
	2	William	Hartsfield	6000 North Terminal Parkway	-	Atlanta	GA	30320	404-555-3285	-	1000	-
	3	Edward	Logan	1 Harborside Drive	-	East Boston	MA	02128	617-555-3295	-	1000	-
	4	Edward "Butch"	O'Hare	10000 West O'Hare	-	Chicago	IL	60666	773-555-7693	-	1000	-
	5	Fiorello	LaGuardia	Hangar Center	Third Floor	Flushing	NY	11371	212-555-3923	-	1000	-
	6	Albert	Lambert	10701 Lambert International Blvd.	-	St. Louis	MO	63145	314-555-4022	-	1000	-
	7	Eugene	Bradley	Schoephoester Road	-	Windsor Locks	CT	06096	860-555-1835	-	1000	-

Clicking on the magnifying glass will give a list of all the columns in the report. This is the selection used to choose which columns to search on. There is also an option to search on all columns. Clicking on the "Actions" button will reveal the following menu:



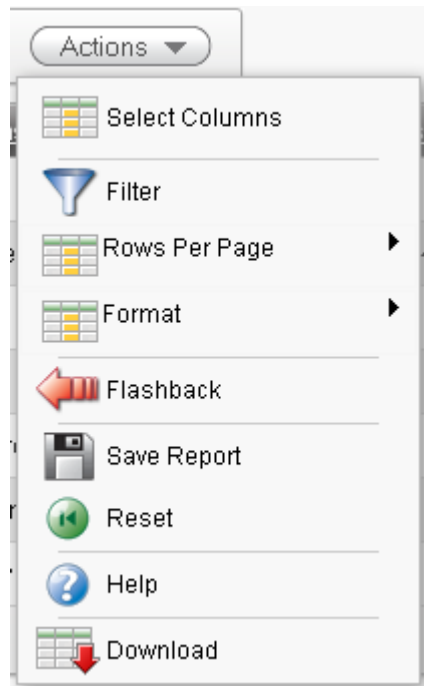


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With the following “Rows Per Page” and “Format sub-menus:



Furthermore, a user can click on any column heading and get the following menu:



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**Cust Street Address1**

1 Harborside Drive  
10000 West OHare  
10701 Lambert International Blvd.  
45020 Aviation Drive  
6000 North Terminal Parkway  
Hangar Center  
Schoephoester Road

Where the up arrow sorts by the column in ascending order, the down arrow sorts by the column in descending order, the table with a red x removes the column from the report, and the last icon adds the column as a control break. Below the icons is a search box which limits the results below the search box. The list below the search box is a list of distinct values that are in the column in the report. Clicking an entry in that list will filter the report to only those rows which have the selected item in the column.

Based upon the technical expertise of each PE, they can choose to develop their own custom reports or they can have TJG develop them at an additional charge. Pricing to develop custom reports is supplied on the pricing sheet.

- 5 Explain your method of ensuring a PE will receive and can provide proof of licenses. Include in your response:
- Describe how you provide a Proof of License certificate to a buyer. Also, provide sample(s) of a Proof of License such as you would provide.
  - Explain your method of retaining back-up copies of Proofs of License; and how, and how quickly, you could provide duplicate copies as needed.
  - Describe how you partner with a PE to demonstrate accuracy of licensing information to a publisher (e.g., True Up).

### Proof of Licenses

Licenses Certificates / License Numbers are stored in our License Management System. They are updated when new product is ordered for a customer or software support is renewed. A report can be generated for the customer that will show all their license information along with their certificate and or license numbers. Refer to questions number 2 beginning on page 1 for samples of reports. Since the License Management System is a production system it is backup and copies of Proofs of Licenses is easily available same day. Our CPIM system will send notifications to the Account Manager when license renewals and software support are due. At that time the Account Manager does an initial software audit and will then work with the customer to get any changes to their organization that would affect their software license structure. They will ensure the proper renewals are being completed.

6. Describe how you work with a PE and publisher to maximize the Entity's value in obtaining products and services under this contract. Description is to address, but is not limited to, the following:
- Working with a PE and a publisher to assist the Entity in best managing their volume or enterprise license agreements.
  - Working with a State and publisher to maximize the leverage created by the total sales volume from a State and its cooperative partners to ensure best value to all PE's.
  - Working with a publisher to maximize the leverage created by the total sales volume overall resulting from this contract.
  - Working with a PE and publisher to obtain the best quote on a high volume purchase.
  - If, and how, you use historical purchase information to provide targeted assistance to a PE.



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Description: **WCSA Software Value-Added Reseller**

- Assuming a software configuration is not within the knowledge or authority of your organization, describe how you could assist a PE in finding a solution (i.e., helping PE obtain needed configuration assistance from the publisher or designee.) Explain how you would 'price out' such assistance.
- Explain the training you could provide (other than online tutorials) to assist PE's in using this contract and obtaining best value from it.

### Working Relationships with Participating Entity

The James Group is in the unique position of being both a Value Added Reseller (VAR) and a service provider. Many Oracle partners have the ability to fulfill license orders but can't match The James Group in terms of the depth of expertise on staff. Our status of Oracle Gold Partner allows us to cater a solution to the customer, guide them through acquisition of the product(s) while offering the most competitive prices on the market, install, implement, and provide ongoing support. The James Group's experienced technical staff, which is backed by the wealth of resources available through Oracle, gives customers the confidence of having tailored solution to meet their needs.

In terms of offering state customers a more aggressive discount structure based on volume purchase, this is commonplace. Many times, a customer may not have the budget to make their ideal license purchase; The James Group and Oracle are sensitive to this. The James Group works closely with customers and the Oracle account teams to present multiple options, to meet the customers licensing and service needs, at the best available pricing. The non-standard approval process is our means to obtaining the best possible pricing from Oracle. By understanding the customer's budgetary constraints and technology needs, we can request special pricing (above and beyond our standard partner discounts) from Oracle. In most cases, the larger aggregate purchase will be tied to an increased discount extension from Oracle.

Many non-standard discount approvals granted by Oracle have an expiration date. Oracle's fiscal year runs through May 31, so extended discounts are historically higher beginning in March. Often times, a customer has multiple implementations or desires to purchase licenses in intervals. The James Group's value as a customer advocate is on display by referencing historical discounts granted for initial purchases and requesting that Oracle match pricing requests on subsequent purchases. By tracking a customer's progress in the implementation stages and maintaining open lines of communication with the Oracle account team and channel, The James Group strives to always present the best possible value.

As previously mentioned, a customer may have access to multiple options for software configurations based on price. By the same token, a customer could achieve the same goals by utilizing different technologies. The James Group will, when needed, consult Oracle for guidance on software configurations. Our status as a Gold Partner grants us access to Oracle's technical expertise and system architecture. The customer plays a key role in this process, so oftentimes discussions (occurring before a customer makes a purchase) are initiated between the customer, Oracle, and The James Group. The James Group views this type of consultation as part of the complete sale/purchasing process.

The James Group has significant expertise and experience negotiating, implementing, and servicing state contracts. Public sector customers in Ohio have the ability to purchase Oracle license and services from The James Group. We are also the sole provider and contract holder for Oracle license, training, and support to Illinois. The James Group, as part of our responsibility as a contract holder, will make reasonable efforts to inform and educate customers on how to purchase and receive best value from a contract. This assistance may come in the form of seminar, face-to-face meeting, or simply providing resources to the state(s) in question.

The James Group's staff is able to take their expertise they have with Oracle and repeat and customize that process to fit other software company structure.

- This contract has a maximum life of five (5) years, the technology field is a fast evolving one, and the potential volume under this contract is beyond any single entity contract.
  - How would you improve the value of this partnership, over time, during the life of the contract?
  - We require the successful contractor(s) to retain publisher certification levels, to improve upon them, to work to reduce their costs to obtain publisher products, etc. Explain your processes to meet these requirements.
  - How would you partner with the Procurement Officer and Participating States to adapt to changes and keep the contract viable?
  - As this is a contract which is expected to be used by many states, there is potential for a level of value and partnership – considering market information, volume, extended relationships with publishers, shared standards, etc. – beyond that



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Description: **WCSA Software Value-Added Reseller**

provided by a single State or PE contract. What extra services or value do you feel you could provide given this expanded user and volume base?

#### Partnership Improvement

As stated before, TJG as a reseller with multiple state contract awards, The James Group is adept in assisting customers renew their Oracle support in an efficient and cost-effective manner. We work in tandem with our Oracle counterparts in preparing a renewal quote that allows the customer time to budget for the upcoming support cost and move the purchase requisition through their internal procurement systems. Usually, the customer can expect a software support estimate 3 months in advance of the upcoming expiration/renewal date. In terms of sort-able data, The James Group uses Oracle's Customer Support Identifier (CSI), Support Contract number, and Support Renewal date to track and sort this information. By sorting customer renewals by date, The James Group ensures that the aforementioned 3-month notice is given to customers, allowing time for purchase order processing.

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8. What performance measures would you establish to ensure yourself and users of this contract that you are, at a minimum, meeting the requirements of this contract, providing cost-savings solutions, and realizing a high level of customer satisfaction. Describe your methods of defining and tracking your performance against specific measurable objectives. Provide copies of any reports you may have developed that communicate your performance levels to customers.

#### Performance Measures

TJG can easily assure our customers that we are meeting the requirements of this contract, providing cost-saving solutions and realizing a high level of customer satisfaction by using our Client Project Information Management System (CPIM). All issues will also be tracked using CPIM. Key Client Team Members will be given access to CPIM and trained on how to use this tool. This will give the Client real-time access to the support issues and open projects.

Our Team approach to Customer Service begins with communication. A communication plan will be established by the Account Manager and the CE. The communication plan will identify the required documents to be created, who will receive these documents, who is responsible for creating and updating the documents, and how often the documents need to be updated.

A status report, an issue management log and risk management report are the minimum documents that will be created and maintained. All documents or modifications of current communication documents will be modified per the request of the CE. Information contained in the Status Report will be determined by the CE and the Account Manager. Reports are easily created and can be easily changed because CPIM has the same robust reporting system that the License Management System has. Refer to question 4 beginning on page 9 for an overview of reporting.

9. We have requested information about optional reports (Question #4), about functions you could serve to assist in more complicated configurations (Question #6), and in providing extra value possible given the potential magnitude of this solicitation (Question #7). Please use this item as an opportunity to describe other value-added services you can provide that were not specifically required in this solicitation, but are consistent with its intent. Please advise the cost for the services you describe in the Offeror – Pricing attachment, or advise if they are included at no additional cost.

The James Group not only supplies software license sales and software support but we are also a full IT consulting firm. We have the ability to supply the following services:





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### Applications Development

The James Group provides design and construction of small and simple to large and complex IT projects. Our solutions are not just about the implementation of IT alone. We also create processes and business procedures which encompass business process re-engineering.

We can design and construct enterprise solutions (ERP), select and implement Customer Relationship Management systems, identify and implement data warehousing systems and data mining strategies, and design web data and interface applications. We are experienced with numerous languages, environments, tools, and databases.

We employ industry or homegrown life cycle management methodologies to ensure project success. Our professions are trained project managers with business and technology experience.

#### **Our application development services include:**

- Requirements Analysis
- System Design and Analysis
- Software Selection, Development, Deployment and Support
- System Configuration and Management
- Programming and Testing
- Business Process Design and Reengineering
- User Interface Design and Development
- Win32 GUI Application Development
- Full Life Cycle Methodology
- Project Management

### System Architecture

The James Group provides services that offer the ability to leverage a common infrastructure to share data and connect processes between multiple systems or applications. We develop applications and infrastructure by combining core components to support your key business functions and processes. Applications may reside on different hardware operating system across multiple platforms.

We also utilize automated tools to generate code and test systems. We create prototypes and documentation that provides clear design requirements and confirms business operations and database design accuracy.

As with all our services, we employ full life cycle methodologies and project communicate strategies throughout the project.

#### **Our Systems Architecture services include:**

##### **Requirements Analysis**

- Requirements Identification
- Functional Requirements
- Technical Requirements
- Organizational Requirements
- Standards Compliance
- Test Plans & Procedures
- Code Change Control Procedures

##### **Detailed Design**

- Software Component Specification
- Hardware Component Specification
- Physical Database Design
- Requirements Traceability
- Implementation Planning
- Data Dictionary
- User Interface Design

##### **Requirements Analysis**

- Requirements Identification
- Functional Requirements
- Technical Requirements
- Organizational Requirements
- Standards Compliance
- Test Plans & Procedures
- Code Change Control Procedures

##### **System Implementation**

- Software Development
- Software Integration
- Hardware Integration
- Unit and Module Testing
- Integration Testing
- Database Population



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### System Testing

- Unit Testing
- Customer Acceptance Testing
- Configuration Audits

### Business Processing Re-Engineering

Some vendors propose IT solutions without consideration for the existing or future business processes and operations. This is not the case with The James Group. Our professionals are skilled in both business and technology. We take the time to consider your existing environment, along with your business goals and strategies. We analyze and assess business processes, consider alternative solutions, recommend improvements and implement business process changes.

Where new technology systems are needed to improve business processes, we find, create, design, develop, implement, and support the systems. We can provide technical and/or end-user training on the new processes and technologies.

We also work to ensure the long term success of your system by providing business continuity planning and disaster recovery preparedness services.

#### **Our business process re-engineering services include:**

- Business and process analysis
- Systems Analysis
- Strategic Project Planning
- Systems Design
- Process Design
- Technical Research and Analysis
- Workflow Automation
- Business Continuity Planning
- Disaster Recovery Preparedness

### OBIEE Training Classes

The James Group provides both pre-written and custom content courses on Oracle Business Intelligence. Two pre-written courses cover the front-end reporting and back-end meta data. These courses are taught using an in-house non-proprietary data model based on NCAA football statistics. The two classes are Oracle Business Intelligence Answers and Dashboards Training and Oracle Business Intelligence Data Model and RPD File Training.