

Attachment C: Telecommunications Platform Detail

Instructions: Vendor should provide inline responses to each section below and submit in native MSWord format with their bid packages. Please note your compliance in **BOLD** and explain only as necessary on the next line in blue text. Example:

Response: **COMPLY, OPTIONAL COMPLY, PARTIAL COMPLY, or DO NOT COMPLY**

Response text – You may describe your compliance here.

Note: revisions indicated in RED below.

VENDOR EXECUTIVE OVERVIEW

In this section, the Vendor should deliver an introduction to, and summary of, the RFP response and its specific fit for the State Bar of California. Please structure so anyone reading only this section will have a clear understanding of the response and why the solution best fits the State Bar's specific requirements. Include a graphic depiction (Visio or equivalent drawing) that shows the internetworking of all equipment quoted, on the next page for easy reference. Please limit this response to 2-4 pages and directly address the State Bar's stated requirements.

Response:

1	VENDOR INFORMATION	4
1.1	VENDOR BACKGROUND.....	4
1.2	SYSTEM MANUFACTURER BACKGROUND	5
2	INFRASTRUCTURE AND ENVIRONMENT	6
2.1	LOCATIONS AND BRANCHES	6
2.2	DEPARTMENTS	6
2.3	VOICE INFRASTRUCTURE.....	6
2.4	IT INFRASTRUCTURE	7
3	RFP REQUIREMENTS	8
3.1	CRITICAL CONSIDERATIONS	8
3.2	LAN/WAN DEPLOYMENT.....	14
3.3	ATTACHMENT E NON-COMPLIANCE	15
3.4	RECOMMENDED OPTIONAL UPGRADES	15
4	PHONE SYSTEM.....	16
4.1	STATE BAR OF CALIFORNIA SPECIFIC REQUIREMENTS	16
4.2	SYSTEM ARCHITECTURE.....	19
4.3	SOFTWARE	20
4.4	SYSTEM RELIABILITY	20
4.5	MUSIC ON HOLD	21
5	VOICE OVER IP	22
5.1	STATE BAR OF CALIFORNIA SPECIFIC REQUIREMENTS – VOIP READINESS ASSESSMENT SCOPE OF WORK.....	22
5.2	VOIP SPECIFICATIONS.....	24
5.3	ENCRYPTION	25
6	VOICE MAIL PLATFORM	27
6.1	STATE BAR OF CALIFORNIA SPECIFIC REQUIREMENTS	27
6.2	VOICE MESSAGING SYSTEM DESCRIPTION.....	27
6.3	VOICE MAIL SECURITY AND ADMINISTRATION	28
7	UNIFIED COMMUNICATIONS & CTI	30
7.1	STATE BAR OF CALIFORNIA SPECIFIC REQUIREMENTS	30
7.2	UNIFIED MESSAGING.....	31
7.3	UNIFIED COMMUNICATIONS AND COLLABORATION	32
7.4	COMPUTER TELEPHONE INTEGRATION	32
7.5	MICROSOFT OFFICE COMMUNICATIONS SERVER (OCS)	32
7.6	MOBILITY APPLICATIONS (FIND ME/FOLLOW ME).....	33
7.7	AD-HOC CALL RECORDING	33
8	ACD – CALL CENTER.....	34

8.1	STATE BAR OF CALIFORNIA SPECIFIC REQUIREMENTS	34
8.2	ACD QUESTIONS	35
8.3	ACD REPORTING	37
8.4	ACD RECORDING.....	38
8.5	WORKFORCE MANAGEMENT	39
9	SYSTEM ADMINISTRATION REQUIRMENTS	40
9.1	STATE BAR OF CALIFORNIA SPECIFIC REQUIREMENTS	40
9.2	SYSTEM ADMINISTRATION QUESTIONS	40
9.3	SYSTEM MONITORING AND DIAGNOSTICS	41
9.4	SOFTWARE UPGRADES AND PATCHING.....	41
10	IMPLEMENTATION REQUIREMENTS.....	43
10.1	STATE BAR OF CALIFORNIA SPECIFIC REQUIREMENTS	43
10.2	INSTALLATION	43
10.3	TRAINING	43
10.4	USER ACCEPTANCE TESTING.....	44
10.5	CUTOVER COVERAGE.....	44
10.6	SYSTEM ACCEPTANCE	45
11	WARRANTY, MAINTENANCE AND CUSTOMER SUPPORT	46
11.1	STATE BAR OF CALIFORNIA SPECIFIC REQUIREMENTS	46
11.2	WARRANTY QUESTIONS	46
11.3	SINGLE POINT OF MAINTENANCE	48

1 VENDOR INFORMATION

1.1 VENDOR BACKGROUND

1.1.1 Provide a brief (two or three paragraphs) overview and history. Describe the organization of your company.

Response:

1.1.2 Please state how many years your company has been installing this manufacturer, this system, and this particular model. How many customers does the Vendor have with this exact same system and version, installed within 2 hours of State Bar of California's head office?

Response:

1.1.3 How many offices does the Vendor have in North America? Which State Bar of California office cities have a local Vendor office? What is the address of the closest permanent physical office to State Bar of California headquarters where you maintain inventory for the repair of the system you are quoting. How will the Vendor provide sales, installation, warranty and maintenance support in cities where they have no on-site personnel?

Response:

1.1.4 State Bar of California prefers that the project manager and lead engineer for this project be based within a 2 hour drive of the San Francisco Office. Please confirm your intended compliance. Please summarize your process for training and certifying Project Managers, Lead Engineers, and Lead Technicians.

Response:

1.1.5 Please summarize your Manufacturer certifications, sales volume, Distributor tier and any special recognition awarded by the system manufacturer you are proposing.

Response:

1.1.6 Please summarize your Data LAN/WAN Manufacturer certifications, sales volume, Vendor tier and any special recognition awarded by the manufacturers you are proposing, or as relevant to the IT infrastructure at State Bar of California.

Response:

1.1.7 Please summarize your Microsoft certifications, sales volume, Vendor tier and any special recognition awarded by Microsoft.

Response:

1.1.8 Briefly summarize the typical Scope of Work, Project Plan, and process for deploying a solution such as the one described in this RFP. (1-2 paragraph maximum, details can be provided in following sections.)

Response:

- 1.1.9 Briefly describe Vendor’s standard procedures for cutover coverage, trouble identification/reporting, and punchlist resolution. (1-2 paragraph maximum, details can be provided in following sections.)

Response:

- 1.1.10 Briefly describe Vendor’s standard procedures for warranty and maintenance coverage, how State Bar of California would open tickets, and how repairs would be provided. (1-2 paragraph maximum, details can be provided in following sections.)

Response:

1.2 SYSTEM MANUFACTURER BACKGROUND

- 1.2.1 Provide a brief (two or three paragraphs maximum) overview and history of the manufacturer of the system being proposed.

Response:

- 1.2.2 What is the manufacturer’s annual sales volume, net earnings, R&D spend, and market share (citing source) for the last year?

Response:

- 1.2.3 Briefly summarize the history of the solution platform being quoted that has brought it to its current point of development. Summarize the future vision of the system.

Response:

- 1.2.4 If Manufacturer will be providing warranty and maintenance coverage, answer the following question. How would State Bar of California open tickets, receive service, obtain replacement parts, and get onsite support through the manufacturer? (1-2 paragraph maximum, details can be provided in following sections.)

Response:

2 INFRASTRUCTURE AND ENVIRONMENT

For each section below please respond whether the solution being provided will operate in the environment being described. If the solution is non-compliant with any section below, please copy a Response line beneath the section and explain the non-compliance. If there are no notes under a section, it will be understood to be "Read, Understood and Compliant"

Response:

2.1 LOCATIONS AND BRANCHES

State Bar of California's offices are located in San Francisco (headquarters), and Los Angeles. Most management and infrastructure support is located in SF, but operations and call centers are divided fairly evenly between the 2 locations.

1. San Francisco is located in a State Bar of California owned building at 180 Howard Street. State Bar of California is spread over 10 floors with some unaffiliated tenants occupying additional space within the building.
2. Los Angeles is located in leased space at 1149 South Hill Street. State Bar of California occupies floors 4, 5, 7, 8, 9 and 10.

2.2 DEPARTMENTS

Below are some of the major departments within State Bar of California and their role within the organization:

1. Office of the Chief Trial Counsel – is the disciplinary enforcement arm of the State Bar.
 - a. Intake – receives complaints about lawyers (ACD Call Center), documents the complaint, and refers to the appropriate department for investigation.
 - b. Enforcement – investigates complaints about lawyers, enforces probation, and refers to fee arbitration.
2. State Bar Court – hears formal charges against attorneys and recommends action to the California Supreme Court.
3. Admissions – administers the BAR exam, and manages admittance of new attorneys to the State Bar.
4. Member Services Center – manages interactions, registration, billing, and services for Bar members.
5. General Counsel – advises State Bar of California on legal issues for internal matters and for the Ethics department.
6. Client Assistance Programs
 - a. Client Security Fund – reimburses clients who lose money as a result of attorney theft of client funds.
 - b. Mandatory Fee Arbitration Program – arbitrates disputes about attorney fees.
 - c. Legal Services – encourages and facilitates pro-bono work from Bar members.
7. Ethics Hotline – enables attorneys to discuss ethical questions with trained staff members who will refer them to the appropriate rules, opinions and case law so an informed decision can be made.
8. Lawyers Assistance Program – assists Bar members that are having issues with substance abuse or burnout.
9. Trust Fund – administers money to help fund civil legal services and the Equal Access Fund.
10. Administration – perform normal business functions, such as:
 - a. Reception – Answers all calls to State Bar of California (ACD Call Center).
 - b. Information Technology – Supports State Bar of California technology (ACD Call Center).
 - c. Finance
 - d. Human Resources
 - e. Office Services
 - f. Media and public relations

2.3 VOICE INFRASTRUCTURE

State Bar of California has legacy Siemens Rolm 9751 PBX systems at the two offices. These systems are networked together through a point-to-point T1 that is configured for inter-system networking and provides the ability to carry 22

calls. Each office has their own trunks and voicemail system; however, calls can be transferred between offices as necessary. Several ACD groups have agents in both locations.

The San Francisco and Los Angeles Centigram voice mail systems provide an “Information by Phone” application that allows callers to get the information they are looking for without having to consult with an agent. 40-60% of calls to Intake and Member Services are resolved by the Automated Attendant trees.

Automatic Call Distribution (ACD) Call Center applications reside in each office serving various functions, and reporting is generated through the PBX’s, the voicemail systems and a Telecorp Reporting system. Reporting, in general, at State Bar of California is important for the managing of the voice applications. State Bar of California uses a combination of Telecorp, Infotel Call Accounting, PBX ACD, and in-house developed Voicemail reports. The in-house developed reports are facilitated through data dips into the raw data within PBX ACD and the voicemail systems.

Currently, incoming Telephone Company (Telco) trunks are a mixture of analog DID, CO trunks, 1MB, and digital T1 SuperTrunks. The SuperTrunks are channelized and a certain number of circuits are arranged into trunk groups for particular departments. This prevents calls to any one department from flooding the entire phone system and all available lines or VM ports. We expect to move to PRI trunks with the new phone system and hope that we will not need to create multiple trunk groups in the PRIs by using the phone system’s ability to return busy signal to callers after a certain number of calls are received in the system – by DID number. Further details are presented in the Critical Considerations portion of the RFP regarding this requirement.

ADDITIONAL INFORMATION PROVIDED UPON ACCEPTANCE OF NDA.

2.4 IT INFRASTRUCTURE

2.4.1 IT Architecture

State Bar of California has performed a significant number of upgrades to the IT Infrastructure over the last year. All access layer switches have been upgraded, routers have been replaced, cable has been certified, new UPS equipment installed, and WAN circuits replaced. The architecture supports centralization of applications at the Data Center in San Francisco and readiness for future DR and BCP plans. The following drawing will also be provided in soft-copy.

ADDITIONAL INFORMATION PROVIDED UPON ACCEPTANCE OF NDA.

3 RFP REQUIREMENTS

RFP responses **may be disqualified** if they do not meet the following requirements; upon review of any workaround or alternate strategy recommended by the Vendor. Disqualification is not automatic and may be tempered by the overall compliance of the proposed solution. If a Vendor responds as compliant, and it is later discovered that a Vendor is non-compliant to one of the following requirements in this section, Vendor will be considered to be in material breach of contract, and State Bar of California will have access to all remedies provided within this RFP, including cancellation of the contract with a full refund.

Response:

3.1 CRITICAL CONSIDERATIONS

Confirm compliance with each of the following key RFP Requirements and describe how the proposed solution meets these requirements.

- 3.1.1 No Single Point of Failure (99.999% availability) – Any element in your design that would cause the failure of a significant portion (>25%) of the system should be made redundant. If redundancy is not available for this element, then the element should be duplicated or made highly available by adding hot swappable redundant power supplies, RAID hard drives, etc. In addition, software upgrades should be able to be loaded to the system while in operation, with no, or momentary, downtime to implement the software patch.

Response:

- 3.1.2 Mirrored Redundancy for Call Processing – Hot standby failover to a synchronized secondary processor that has a synched database copy and awareness of all calls in progress. Active calls should not be dropped and phones should home to the 2nd processor immediately when idle without rebooting the phone. When the primary server is brought back into service, phones should not require a reboot to recover to the primary processor.

Response:

- 3.1.3 Branch Survivability – In the event of a failure of the WAN, or the unavailability of Head Office, each location should be configured so that it will be able to continue to process calls over local PSTN trunks with no loss of functionality. This includes forwarding calls directly to a specific user's voicemail greeting, and recording a message.

Response:

- 3.1.4 Voicemail Branch Availability – Voicemail functionality at the branch is able to survive a failure of the WAN. Offices should be able to send calls to voicemail correctly even if the inter-office WAN is not available. This may be accomplished by the branch's survivable system passing through the DNIS of the originally dialed party to a centralized voicemail over PSTN. Alternately, distributed and networked voicemail systems may be considered at each branch as long as user feature functionality is identical when dealing with users on the same system or on a remote system. Additionally, users should be able to forward and reply to messages across locations.

Response:

- 3.1.5 Complex Automated Attendant – The current voicemail in each office is configured with multiple complex Automated Attendant trees that provide callers with required information by phone.

- 3.1.5.1 Automated Attendant Branch Availability – In the event of a failure of the WAN or Head Office, the remaining office should be able to continue to process calls to the Automated Attendant without additional user intervention. In addition, there may be a preference to have distributed Automated Attendant in each office to restrict the number of calls that need to traverse the WAN. It is not uncommon for 20-30 callers to be using the AA at any one time.

Response:

- 3.1.5.2 The proposed system should have the ability to provide reports on Automated Attendant traffic, including which options are chosen, where callers hang-up, and where callers are transferred to departments.

Response:

- 3.1.5.3 Many of the greetings and announcements presented in the Automated Attendant are very long. When there is a need to change part of the greeting, the whole greeting must be re-recorded. Does the proposed system have a way of changing greetings so that the caller has the impression of a single announcement, but State Bar of California could re-record only a portion of the greeting?

Response:

- 3.1.6 ACD Branch Availability – ACD Call Center queuing, announcements and routing at the branch is able to survive a failure of the WAN. Each office should stay automatically synched with ACD changes at the other office during normal operating mode, but able to operate independently if the WAN or Head Office is unavailable. Reporting does not need to be maintained during a failover, however the ACD system should continue to compile ACD statistics during the WAN failure. Upon WAN recovery, the branch should re-compile ACD statistics with the main statistics store and full reporting should be available for the outage period. How would the proposed solution provide this functionality?

Response:

- 3.1.7 Technology Preference – VoIP versus TDM

3.1.7.1 State Bar of California prefers a Voice over IP telephone system. State Bar of California understands that the clear direction of telecommunications technology is towards VoIP and that TDM technology is no longer relevant for most of the desired features and future functionality.

3.1.7.2 Vendors that wish to provide a quote to upgrade the existing phone system are strongly encouraged to provide two bids – one as an upgrade to the currently installed TDM technology, the second as a complete and new VoIP installation. Any such quote requires that the new system functionality be implemented without any degradation or interruption in service to the existing telephone system. The logistics of deploying the new system while the old system remains operational should be considered.

Response:

- 3.1.8 The proposed solution must support Uniform Coordinated Dialing between disparate telephone systems where a user simply dials an extension number and the phone system inserts, or deletes, digits to place the call through dedicated T1 connection to the Siemens Rolm system. This is required to simplify phased branch by branch roll-out of the new system and integration to the old system during deployment and testing.

Response:

3.1.8.1 The T1 card used to integrate with the existing State Bar of California voice network will only be required through the implementation period and will no longer be required once the final location is cutover. State Bar of California would be interested in any ability to rent or borrow the required T1 card so that unnecessary equipment is not purchased. Alternately, if the same T1 card can support T1 or PRI, the spare PRI card being purchased could support integration to the Siemens Rolm system in LA. Please explain below how the proposed solution provides the required T1 card for integration to the existing State Bar of California voice network.

Response:

3.1.9 Implementation of the new phone system will follow the Proof of Concept (PoC) model for deployment. All required servers will be deployed in the San Francisco Data Center. State Bar of California will then fully deploy VoIP functionality to a pilot group of users in each branch. If it is discovered that the system is materially non-compliant with the requirements of this RFP, or the specified reliability and voice quality cannot be provided; State Bar of California will be allowed to cancel the contract for material breach of contract by the Vendor. Once the functionality desired in this RFP is proven through the PoC, installation will continue for SF office and the LA office. At that point, all remedies provided in this RFP and by rule of law will remain available to State Bar of California.

Response:

3.1.10 ACD Call Center Requirements – State Bar of California has significant ACD requirements and the proposed solution must be able to deliver advanced Skills Based Routing and Reporting functionality. Detailed requirements are specified in the RFP Schedules and the ACD section of this RFP. Key features are highlighted below. Please state your compliance with the ACD requirements of this RFP here, and briefly summarize. A detailed response can be given in the later RFP section.

3.1.10.1 Skills based routing where calls are distributed to agents based on agent skill, and proficiency

3.1.10.2 Advanced ACD reporting

3.1.10.3 ACD Agent – view queue status

3.1.10.4 ACD Supervisor – view real-time and historic queue status; and monitor agents

3.1.10.5 ACD Team Lead – monitor queue status and train agents

3.1.10.6 1 x ACD wallboards

Response:

3.1.11 ACD Wall Board – State Bar of California currently has a Telecorp Inc. LED 4120 Readerboard in the Intake ACD area. This board is used by supervisors and agents to easily determine the state of the queue and will need to be replicated in addition to the desktop PC and telephone queue status functions required elsewhere in this RFP. Please describe whether the proposed application will support integration to the Telecorp Readerboard, and include in pricing if possible. Alternately, Vendor can propose supplying a new wallboard, or an LCD monitor to replace the current readerboard. However, the Vendor should be responsible for all programming, mounting, wiring, connection cables, and hardware (including the actual monitor) to facilitate the wallboard and the wallboard should be easy to view from across a large room, similar to the current application. Describe the proposed solution below with screen shots if possible.

Response:

- 3.1.12 As previously mentioned, the current Telco Trunking is separated into trunk groups to prevent calls to one department or ACD queue from flooding the PBX trunks and voicemail ports. AT&T does not support creating trunk groups on PRI trunks. The phone system should support PRI Min/Max functionality that will signal the Telco on the D-Channel to return a busy signal when calls to a particular DID number reach a certain threshold. Bear in mind that these calls may be delivered into an ACD queue, the VM Automated Attendant, may be answered by an agent, or may be transferred to other users in either location, and all of these call types should accrue to the maximum number of calls allowed.
- 3.1.12.1 For each departmental phone number DNIS, DID, or Toll Free number, State Bar of California would program a maximum number of calls that can be received by the phone system after which additional calls will receive a busy signal generated by the Telco (even if additional B-channels are still available on the PRI).
 - 3.1.12.2 For certain departmental phone numbers or DIDs, State Bar of California would program a minimum number of channels that would be reserved for inbound calling to that number even if the total call volume being received by the phone system would have required that all lines be used. Additional calls will receive a busy signal generated by the Telco (even if additional B-channels are still available on the PRI).
 - 3.1.12.3 If the functionality above cannot be provided by the solution being proposed, State Bar of California will need to create multiple trunk groups on an undetermined number of T1s per location. This means that a certain number of channels would be reserved for various DID numbers such as Intake, MSC, Ethics, etc. The phone system will need to be able to similarly create trunk groups within the T1 to prevent outbound calls from accessing the channel for the reserved trunk groups, and provide accurate reporting.
 - 3.1.12.4 Describe below which of the above features are available on the proposed solution, how the functionality is programmed, and how the feature works.

Response:

- 3.1.13 Calls into the State Bar of California main number are currently answered by a voicemail tree and callers may opt out for assistance to the ACD agents in SF and LA for each of the offices' main numbers. These agents have a regular telephone with an add-on Busy Lamp Field box, but the BLF cannot accommodate all extensions in the business. While the ACD queue provides the apology messages, routing, overflow and reporting required; it is not ideal for viewing the status of an extension before completing a transfer or for advanced Receptionist/Operator functionality. State Bar of California would prefer a solution more along the lines of an "Attendant Queue" which would have many of the same features of an ACD (call distribution, apology messages while in queue, overflow, reporting) but would also present interactive company and extension directories and Busy Lamp Field status before transfer. Please describe whether you intend to meet the Operator requirements of this RFP with ACD call center, a custom Attendant queue, or other specialized software. Describe the functionality provided by the quoted solution and how it would differ or improve upon current main number handling.

Response:

- 3.1.13.1 State Bar of California expects that the Operator positions at either location would be able to answer and handle calls for the other location. This will require BLF status across the network and the ability to easily transfer calls between locations, and to voicemail.

Response:

- 3.1.14 Analog Stations – State Bar of California has a substantial number of analog telephones, fax machines and modems.
- 3.1.14.1 The proposed system must allow analog stations such as the retained Polycom conference phones to access substantially all of the features available to VoIP telephones through the use of feature access codes – especially flash (2nd dialtone), conference and transfer.
 - 3.1.14.2 Additionally, FXS (analog station) ports must provide **Telco Central Office Line** standard ringing voltage and talk voltage in order to interface with 3rd party equipment.
 - 3.1.14.3 The State Bar Court has Crestron and Vortex AV/PA systems with overhead speakers and multiple microphones throughout the courtroom in both SF and LA. The proposed system must be able to emulate a Telco Central Office FXO trunk, on a station side FXS port, with standard ringing and talk voltage to integrate with this system.

Response:

- 3.1.15 Voicemail must have an interview feature (sometimes called voice forms). The voicemail would ask the caller a question, then give a beep; the caller will then record their answer and then press the # key. The voicemail would then ask the next question and beep, the caller would record their next answer and press the # key, and so on. All of the caller's answers are then concatenated into a single voicemail message that can be transcribed by the subscriber. Please describe how this functionality will be provided by your solution, and any limitation to the number of questions/answers that can be recorded in a single voicemail message.

Response:

- 3.1.16 State Bar of California requires the new system to provide Unified Messaging. Please state whether the voicemail solution being quoted is compliant, and briefly discuss how this functionality is provided. State Bar of California defines Unified Messaging as the following.
- 3.1.16.1 Voicemail messages appear in user's Email Inbox on their computer, Outlook Web Access, iPhones (ActiveSynch), Blackberry (Blackberry Enterprise Server) or other smartphones;
 - 3.1.16.2 Voicemail messages which appear in the user's Inbox have the actual voicemail attached as a .wav or mp3 file that can be played from the computer or SmartPhone;
 - 3.1.16.3 Email Inbox, SmartPhone Inbox and Voicemail Mailbox remain in synch as messages are played and deleted;
 - 3.1.16.4 Voicemail messages that are listened to from the computer or SmartPhone will turn off the Message Waiting Indicator on the phone system;
 - 3.1.16.5 Messages that are deleted from the computer or SmartPhone are deleted from the voicemail store and moved to the deleted items folder;
 - 3.1.16.6 Messages that are deleted through the telephone user interface of the voicemail are deleted from the email and SmartPhone inbox.
 - 3.1.16.7 Messages can be saved to personal folders, .pst files, or document management system by dragging and dropping from Outlook or SmartPhones (does not require a user to "Save As" a message for retention).

Response:

- 3.1.17 State Bar of California would prefer a Unified Messaging system that stores voicemail on a server other than the corporate Exchange Server. Ideally, the voicemail server would insert a placeholder into the Exchange message stack that would look like an email to the end user in Outlook. When the message is played through Outlook, it

might stream or download directly from the voicemail server to the desktop without touching Exchange. This solution is preferred to overcome limitations of future decentralized Exchange environments, large mailboxes, latency between Exchange and your Unified Messaging platform, etc. Does the proposed solution support this configuration? (Vendors that cannot support this functionality WILL NOT be eliminated from consideration. However, Vendors are encouraged to propose a solution that comes closest to this ideal as they are able.)

Response:

3.1.18 Regardless of the Voicemail or Unified Messaging architecture being considered, the proposed system must allow users to forward a voicemail message to another user at either location easily. Forwarding messages between State Bar of California locations should be just as easy as forwarding a message to another user on the same voicemail system.

Response:

3.1.19 Mobility – Calls that go to voicemail should allow the caller to press 1 (or other button) to reach the called person on their cell phone, press 0 to reach the operator, press another button to reach their personal assistant (which might vary by extension or class or service), or leave a message. If the call is not answered on the cell phone, the call should be pulled back and a message taken in the voicemail system at Head Office. When the call is extended to the cell phone, the caller ID of the original calling party should be passed to the display of the cell phone. Please describe how you will provide the functionality requested above and a screenshot of the user interface. Include this feature for 56 users in the base pricing.

Response:

3.1.20 50 employees should be able to move their extension to another telephone through Hot-Desking, Hotelling, or Extension Mobility. This new phone would mirror the functionality, features, message waiting indicators, and programming of their normal phone. Hot-desking should be available between locations in the proposed solution.

Response:

3.1.20.1 Describe the process for hot-desking to another extension? What will the user experience be like if they log into a different model phone than their own, especially one with more/less buttons? Is this same functionality available through softphones? Are there any phone models quoted that will not support hot-desking?

Response:

3.1.20.2 How does a user log out of the telephone? Can a user remotely log out of a hot-desk phone. When a user relinquishes hot-desk control of a phone, will both phones return to their original user profile?

Response:

3.1.21 Click to Dial – State Bar of California would like all employees to be able to place calls by pressing the dial button within their email client from the Contacts or the Global Address List. How will the proposed solution allow a user to dial a phone number from Outlook 2003 (and Outlook 2010 in the future) clients and have the call

complete on their VoIP deskphone? Is there any additional software or licensing required? If so, please describe which application provides this functionality and include this application in your base price for all employees.

Response:

3.1.22 ACD Screen Pops for 30 agents – calls to agents should perform a screen pop with caller information from the AS400 database by looking up the Caller ID received and delivering the correct screen to the user’s desktop. The users’ currently access the DB2/AS400 database through I Series Access for Windows (formerly IBM Client Access) which is a terminal mode emulation program. It has been confirmed that that this software supports CTI integration through ODBC, DDE and API EHLAPI. It would be expected that the database lookup would be performed based on the Caller ID of the received call, or by a caller entered member #. The proposed solution should have the ability to support both lookup methods. State Bar of California expects to upgrade the client software to a new application later in 2011 called Profound Logic Genie. This is a webified front end to AS400 terminal mode. Please include pricing in your proposal to deliver the functionality requested. **This is a required element and any proposal that does include this application in the base pricing will be rejected as non-compliant. If Vendors require any further information or discovery, it is important that they provide all questions as early as possible in the RFP process to allow State Bar of California’s internal applications development department to research and reply. Pricing should be turnkey including discovery, design, testing, implementation, training, hardware and software.**

Response:

3.1.23 Future CRM Integration – State Bar of California intends to implement an “off the shelf” shrink-wrapped CRM solution in the future. It has not been decided whether it will implement an enterprise wide CRM or whether certain departments will implement their own CRM. However, the CRM solution will be expected to integrate with the new phone system for Screen Pops and Click to Dial. Describe how integration to 3rd party CRM solutions is typically achieved and differentiate between on-premise and cloud-based (SaaS) solutions. Please note whether the phone system has any “shrink-wrapped” integrations to popular CRM solutions, and which CRM solutions might be supported in the base proposed configuration. Please provide a general ballpark estimate of the cost for software and implementation to a popular CRM solution for about 30 employees below.

Response:

3.1.24 Harassing Calls – State Bar of California would like the ability to mark a call for Malicious Call Trace so that it can easily be identified in Call Detail Reports. Additionally, State Bar of California would like optional pricing for Ad-Hoc call recording that could be turned on by a user during a call. Ideally, turning on the Ad-Hoc call recording would retroactively record the call from the beginning of the call, but this is not a required feature. Please describe the proposed and optional solutions to deal with harassing callers.

Response:

3.2 LAN/WAN DEPLOYMENT

3.2.1 Vendor is expected to work in concert with State Bar of California, outside Vendors and other specialists to deliver a LAN/WAN configuration that is 100% operational and suitable for VoIP. Vendor will be responsible for providing consultation, best practice recommendations, and switch and router configuration scripts for the models and software revision levels that State Bar of California has deployed; in order to support VoIP, Quality of Service, telephone discovery, and network connectivity to the specifications required by the VoIP manufacturer. Network consultation and engineering will include all existing LAN/WAN switches, routers, and firewalls.

Typically, State Bar of California will provide a “Show Run” or equivalent from each switch and router, and Vendor will provide a configuration script that will amend the current configuration to support the VoIP implementation. State Bar of California (or 3rd party specialist) will then implement the changes that are designed and vetted between State Bar of California and Vendor into each switch and router in the enterprise.

Response:

3.3 ATTACHMENT E NON-COMPLIANCE

- 3.3.1 Attachment E lists features and functionality that State Bar of California requires in the proposed solution. However, as a spreadsheet it may not provide adequate room to explain non-compliance. Please use the following space to explain any features that were responded to as Optional, Partial, or Non-Compliant where State Bar of California marked the feature as “Required”. Also, describe work-arounds and optional pricing below if there was not enough space on **Attachment E**. Lastly, provide an explanation for any partial or non-compliance with features that we marked as “Should Have but Optional”.

Response:

3.4 RECOMMENDED OPTIONAL UPGRADES

- 3.4.1 In answering this type of Request for Proposal, Communication Strategies recommends that Vendors provide pricing on the minimum cost alternatives that allow for full compliance with the RFP. However, we would be interested to know what options or upgrades you would recommend to your base configuration. Please name, define, describe, and price each upgrade that you would recommend in your hardware, software, or feature functionality.

Response:

4 PHONE SYSTEM

4.1 STATE BAR OF CALIFORNIA SPECIFIC REQUIREMENTS

4.1.1 Resiliency

As previously mentioned in the Critical Considerations section, Hot Standby Redundancy with Branch Survivability is the minimum compliant solution to this RFP. However, State Bar of California is interested to know whether the vendor would be able to provide the following additional redundancy and the optional cost for the upgrade. Pricing should be quoted in the optional section of Schedule A.

- 4.1.1.1 The current PBX system in SF has analog bypass lines that will cross-connect analog trunks to certain analog stations in the event of a failure of the phone system or a power outage. Is this functionality available on the proposed solution, describe?

Response:

- 4.1.1.2 Geo-Redundancy – State Bar of California would like to separate the redundant server pairs of the Phone System, Voicemail, and Call Center to separate locations. Can you separate the primary and redundant servers for each application between Head Office and a second location for Geographic Diversity? Is it supported by the manufacturer, and what are the pre-conditions? What WAN bandwidth, latency and architecture will be required to implement geographic redundancy? Will the servers be active/active or active/passive? Please provide optional pricing where indicated on Schedule A.

Response:

4.1.2 Architecture

- 4.1.2.1 State Bar of California would prefer that all locations be part of a single telephone system with a single database image. Multiple systems with databases that are coordinated by a centralized system administration software that emulates single system functionality is not compliant with this definition. Please state whether your base pricing includes this architecture.

Response:

- 4.1.2.2 Virtualization – State Bar of California prefers VMware virtualized servers in order to minimize hardware requirements, leverage capital investments, and facilitate server/application replication and failover. Which parts of your equipment stack will support server virtualization, and would you encourage or discourage use of virtualization in the system? Virtualization is NOT REQUIRED in this RFP but Vendors that can support virtualization will be preferred if all other issues are equal.

Response:

4.1.3 Telephone Specifications for State Bar of California

- 4.1.3.1 All telephones should be GigE, meaning that they can supply a switched Ethernet port to an attached computer at Gigabit Ethernet speeds. Please also price (as an option) what cost savings could be achieved in deploying non-GigE phones.
- 4.1.3.2 Phones that utilize paper designation strips for button labels will not be accepted.
- 4.1.3.3 The PC Attendant Console should provide receptionist/operator functionality with an on-screen busy lamp field that shows status of telephones across any networked locations. Phone system should

automatically re-direct any operator calls to a back-up reception position (described below) if the PC Console were to lock-up, fail, or require rebooting.

- 4.1.3.4 Backup Receptionist or Departmental Answering Point telephone - State Bar of California requires a non-PC "Operator" position. This telephone will provide coverage to department operators and provide full operator functionality in cases of emergency, call coverage or when a PC console needs to be restarted. This should be a standard multi-line phone with attached Busy Lamp Field, or a hardware based (non-PC) attendant console.
- 4.1.3.5 Staff (Standard) telephone requirement is for a multiline set capable of supporting at least 2 extension appearances. The following features, accessible via fixed or soft feature keys, are required: internal and PSTN dial-tone, hold, transfer, message waiting indicator, ad-hoc five-party conference call, system speed dial access, personal speed dial access, and forward to voice mail. LCD display, two-way speakerphone and the ability to independently mute speakerphone, headset and handset calls is required for this set.
- 4.1.3.6 Executive telephone requirement is for a Full Duplex speakerphone capable of supporting Busy Lamp Field appearance for 1 other telephones, intercom to their assistant, and one touch speed dials for 3 numbers (minimum 6 button phone required). All other features of the Standard telephone need to be supported as well.
- 4.1.3.7 Manager telephone requirement is for a Full Duplex speakerphone capable of supporting Busy Lamp Field appearance for 1 other telephones, and one touch speed dials for 2 numbers (minimum 4 button phone required). All other features of the Standard telephone need to be supported as well.
- 4.1.3.8 Executive Assistant (Secretary) telephones shall include all features of the standard telephone, however be equipped with the ability to monitor at least 3 Executives. Secretary should be able to tell if an Executive is busy on any of their extension appearances. Call Coverage Keys should ring or delay ring along with the Executive's telephone. Secretary phone should have 2-way intercom button to their executive.
- 4.1.3.9 Basic (or courtesy) telephone requirement is for a single or multi-line phone that would be placed in very low usage areas such as intern desks, waiting areas, lunchroom, etc. The following features, accessible via fixed or soft feature keys, are required: internal and PSTN dial-tone, hold, transfer, system speed dial access, and park pickup.
- 4.1.3.10 The ACD agent telephone or PC application shall include the following key appearances, soft-keys, or interactive display: Login/Logout, Not Ready, Make Busy, Wrap Up, Activity code, # calls waiting in queue indication, Supervisor Assistance Request, personal DN, and all features of a standard phone. This terminal shall include at least 1 headset jack and preferably a second to allow training of new employees, or for a supervisor to monitor calls.
- 4.1.3.11 Supervisor telephone or PC application shall include all features as listed for the ACD terminal. In addition, the ability to monitor and listen to an Agent is required. The supervisor application or telephone should allow viewing of the current state of the queue, number of agents logged in, and service levels.

Response:

4.1.4 Telephone Questions

- 4.1.4.1 Provide a brief description and picture for each telephone being proposed below. If you are quoting VoIP telephones, specify data speeds available/quoted (10/100/1000), optional snap-in interfaces available, and power requirements (or which PoE class) for each phone. Please note if any of the phones require a wall mount kit and include pricing in the Schedule A. Please fill in the model number that you have quoted for each phone type onto the appropriate line of Schedule B.

Response:

4.1.4.2 Provide a screenshot and brief description for the PC softphone.

Response:

4.1.4.3 Provide a screenshot and brief description for the PC based Operator's console. Will the attendant console automatically pull database updates from the Call Processor for station extensions? If not, how is this process completed?

Response:

4.1.4.4 The quoted phones should allow users to navigate a telephone directory from the display of their phone. Where will this directory be retrieved from?

Response:

4.1.4.5 If a color display option is available (and not already included in your proposal) include the incremental cost to upgrade all telephones to color in the options section of Schedule A.

Response:

4.1.4.6 Do headsets require an external amplifier to provide adequate sound quality and volume? Do the telephones quoted have a "headset" mode where the handset does not need to be removed from the cradle, or is a handset lifter required? Does the phone have a separate headset jack, or does it connect in line with the handset?

Response:

4.1.5 Features

4.1.5.1 Departmental "must answer" line. This is a button that appears on a group of telephones to be answered by anybody in a department. Callers would access this line either by direct dial, operator transfer, or transfer out of voicemail. It should have multiline attributes so multiple calls can be ringing into the group simultaneously. This button should include a Message Waiting Indicator for voicemails to this extension in addition to the user's voicemail. Please describe how this is accomplished and any drawbacks.

Response:

4.1.5.2 State Bar of California currently uses the following features which should be supported in the quoted solution: ring groups, hunt groups, simultaneous ring groups, pick-up groups, directed call pick-up, directed hold pick-up, directed call park (park+extension to park, upnpark+extension to retrieve), personal speed dial lists, and department speed dial lists. Please let Communication Strategies know if any of these features needs to be further defined in order to answer this question. Please respond with your compliance to these features below.

Response:

4.1.6 Call Accounting System

4.1.6.1 State Bar of California requires an enterprise wide Call Accounting System to replace the ISI InforTel system currently deployed. Please describe your call accounting software package below.

Response:

4.1.6.2 The Vendor is responsible for fully programming the Call Accounting system and ensuring that it is loaded with appropriate rate tables, reports and alarms. Please describe procedures and pricing for rate table updates.

Response:

4.1.6.3 Will the package provide alarms and notification for suspected toll fraud activity (hacking)? Will the software provide exception reports for long calls, expensive calls, or restricted calls?

Response:

4.1.6.4 System should provide reports for inbound/outbound/internal phone calls per employee and department, traffic reports for Telco trunk groups and station hunt groups, and peak busy hour usage reports with grade of service and recommended trunking.

4.1.6.5 Can reports be scheduled to run automatically? Can they be sent to a network printer? Can reports be sent to a file? Will scheduler create a unique file name for each report and date?

Response:

4.1.6.6 Can reports be scheduled to automatically email to various people without human intervention?

Response:

4.1.6.7 Can reports be exported to Microsoft Excel, Access or other formats? Which?

Response:

4.2 SYSTEM ARCHITECTURE

4.2.1 Provide a brief description and discussion of the recommended system architecture. Describe connectivity and communication between its integral parts. Include a Visio or Bay Face diagram to illustrate the quoted architecture (not a generic drawing). Also include a standard data rack elevation showing all Data Center equipment including servers, cabinets, switches and routers.

Response:

4.2.2 System must be able to provide traffic reports and report historic trunk utilization by trunk group or for specific lines, in the base system being quoted. The system should provide a peak busy usage report that shows the

maximum number of lines used during specified periods. Please include samples of these reports in the appendix and your softcopy.

Response:

- 4.2.3 The proposed solution should be 911 compatible, which we define as:
- 4.2.3.1 Route calls over appropriate local PSTN connections that are identified by the Telco Central Office with the correct address at the Public Service Answering Point, even if that route is different from the standard Least Cost Routing route for that station and location;
 - 4.2.3.2 Allow a 911 call to be made from any station, even if that station is restricted to extension dialing;
 - 4.2.3.3 For stations that do not have local PSTN connections, calls over the WAN/VoIP infrastructure should correctly send a default location for that station to the PSAP that will differ from the rest of the stations that connect over those PSTN connections;
 - 4.2.3.4 A designated person or group should be notified when a 911 call is made from the phone system.

Response:

- 4.2.4 State Bar of California will provide any required battery back-up. Will the proposed system require any non-standard plugs or voltage (DC, 220v, twist-lock), if so please specify?

Response:

4.3 SOFTWARE

- 4.3.1 What underlying operating system is used for the applications that form the telecommunications platform (i.e. Windows 2000, VXWorks, Linux, Unix, etc.)? List the operating system for each server being proposed. The Vendor is responsible for providing the Operating System (OS) for all servers required.

Response:

- 4.3.2 Please describe how the underlying OS has been “bolstered” to prevent exploitation of OS security flaws. Unneeded applications should be uninstalled, removed, or disabled from the OS. This is particularly relevant to Windows operating systems. Which Firewall ports does your application use, keep open, or listen to?

Response:

- 4.3.3 State Bar of California prefers to implement a new software release after it has been generally available (G.A.) for at least 3 months. The software can then be considered stable and there should have been an x.1 type software release to resolve any software bugs. Please make note if you are recommending the installation of any software that does not meet this criteria, and your justification for doing so. When is the next release due?

Response:

4.4 SYSTEM RELIABILITY

4.4.1 If not already answered in previous sections, please describe which resiliency features have been included into the base price on this RFP response. How does the proposed system provide for fault tolerance? Please describe any functionality that makes the system inherently fault tolerant.

Response:

4.4.2 If a branch location loses connectivity to the central call processor and fails into local survivable mode, which specific features will be lost in local survivable mode (please summarize important features below and then provide a complete listing in the appendices)?

Response:

4.5 MUSIC ON HOLD

4.5.1 In order to minimize traffic on the WAN in a VoIP implementation, the system should be able to provide music on hold from the PSTN gateway at each location. What music on hold interface is recommended for remote locations? Does the system provide the ability to play standard .wav or .mp3 files as music on hold from a file saved on the gateway?

Response:

4.5.2 If the system cannot provide Music on Hold locally at a branch, can it provide multicast music on hold that would stream one audio connection to each location (not one audio connection for every call on hold)? Can the system be configured to stream music on hold as G711 while the rest of the VoIP traffic between locations is G729?

Response:

4.5.3 Conference calls that are put on hold while adding parties should be able to speak with each other and not hear music on hold.

Response:

5 VOICE OVER IP

5.1 STATE BAR OF CALIFORNIA SPECIFIC REQUIREMENTS – VOIP READINESS ASSESSMENT SCOPE OF WORK

5.1.1 VoIP Quality and Performance Expectations

It is expected that a Voice over IP installation will be reliable and provide high quality voice. We define the following as our minimum acceptable performance for VoIP telephone systems:

- 5.1.1.1 Provide 99.999% uptime of all applications during regular office hours;
- 5.1.1.2 Provide 99.99% total uptime including after hours system maintenance;
- 5.1.1.3 For LAN calls using G711, telephones should deliver an average Mean Opinion Score (MOS) of 4.5 (better than toll quality), and minimum Mean Opinion Score of 4.0 (toll quality);
- 5.1.1.4 For WAN or G729 calls between locations, telephones should deliver an average Mean Opinion Score of 4.0 (toll quality), and minimum Mean Opinion Score of 3.5 or better (cell phone quality);
- 5.1.1.5 Telephone calls will be free of echo, choppiness, sound artifacts, poor sound quality, and dropped calls.

Response:

- 5.1.2 An initial discussion (upon contract award) will be held between the Vendor and the State Bar of California to review all applications and data flows on the LAN/WAN, including all hardware installed, software revisions, and routing/switching programming. Upon completion of this initial discovery, Vendor will provide recommendations for upgrades and remediation.

Response:

- 5.1.3 Once the production LAN infrastructure has been upgraded to support VoIP (per the results of the Vendor recommendations above), Vendor will conduct a VoIP Readiness Assessment of the newly upgraded LAN. This assessment should be performed within one week of the installation of any new LAN equipment to support VoIP, and configuration of QoS on all links, so that State Bar of California has sufficient time to address any shortcomings discovered by the assessment prior to full deployment.

Response:

- 5.1.4 The scope of the network health check will consist of the following:
 - 5.1.4.1 Use of a standard testing tool such as Vivinet NetIQ, Viola NetAlly, Verint, or equivalent;
 - 5.1.4.2 Testing Server shall be positioned on the core network switch expected to support the voice communications call server, with testing end-points strategically positioned in the voice VLAN of each and every IDF of every office;
 - 5.1.4.3 VoIP Assessment should test mesh connectivity from every IDF to every other IDF (not just closet to core);
 - 5.1.4.4 An initial test should be performed where call traffic is gradually “throttled up” to the limit set in Call Admission Control to ensure that the QoS bandwidth allocations are sufficient to prevent discarded packets;
 - 5.1.4.5 Once voice capacity is established, Vendor should generate data traffic, such that the uplink from an IDF to the MDF is saturated to near 100% utilization while generating test voice traffic, to ensure that

QoS on the LAN is properly implemented to prioritize voice packets over data packets. This test will be repeated one time for each different access layer switch type to ensure that implemented QoS methodology is working correctly;

- 5.1.4.6 In order to test QoS over the WAN, Vendor should generate data traffic, such that the uplink from the Core to the CPE Edge is saturated and the Edge router is forced to shape traffic and drop excess data packets in favor of higher QoS voice packets. Voice traffic will be generated and measured during the saturation test and Vendor will provide a Mean Opinion Score (MOS) for the voice traffic under load;
- 5.1.4.7 For the saturation test above, the Vendor will provide all testing methodology, hardware and software that will be used to generate sufficient traffic to flood the uplinks from the IDF to the Core in the LAN, and between locations on the WAN. These tests will need to be conducted after business hours so that they do not impact business processes;
- 5.1.4.8 A normal testing session will then be initiated between all end points using expected voice and data traffic and should last no less than 3 days;
- 5.1.4.9 Testing shall use the G711 codec using a 64kb packet size with a 20ms jitter buffer on the LAN. If your system recommends other "Best Practices" then test should match manufacturer recommendations;
- 5.1.4.10 Testing shall use the G729 codec using a 20ms sampling rate and 40ms jitter buffer on the WAN. If your system recommends other "Best Practices" then test should match manufacturer recommendations;
- 5.1.4.11 Test results should include: throughput (bandwidth), packet loss, packet delay (latency), jitter (variable latency), and the minimum and average Mean Opinion Scores that can be expected per LAN/WAN segment;
- 5.1.4.12 Vendor will then interpret, and summarize the findings and provide a verbal and written recommendation for any remediation;
- 5.1.4.13 If the initial test of the network fails, and remediation is required, Vendor will retest the network one time with the same process as above, after remediation is complete, and prior to bringing the new voice system into production.

Response:

- 5.1.5 Please comment on the diagnostic tools you will use and the type of report that we would expect to see. Please include a sample VoIP Readiness report in the CD provided with this response (paper copy not required). It is expected that these tests will be performed by the awarded Vendor, or a sub-contractor that specializes in this type of analysis.

Response:

- 5.1.6 What tool will be used to generate the required data traffic load on the LAN and WAN, in order to flood the uplinks and WAN circuits?

Response:

- 5.1.7 After the initial VoIP network readiness assessment, Vendor will be required to explain and price any additional remediation recommended in order to achieve the goals above. Once State Bar of California has implemented the remediation, and the network has been certified through a follow-up assessment, the Vendor and Manufacturer are expected to guarantee the installation (other than WAN carrier quality issues). If the installation fails the requirements in Section 7.1(for example due to dropped calls, poor quality calls, static, echo):
 - 5.1.7.1 Vendor will have five days to identify the problem,

- 5.1.7.2 State Bar of California will assist in problem identification/resolution under the direction of the Vendor,
- 5.1.7.3 Vendor will need to provide definitive proof that the problem exists in the underlying Cabling/LAN/WAN fabric if there is an assertion to that effect,
- 5.1.7.4 Vendor will have five additional days to correct the problem if it is in the hardware they have provided.

Response:

- 5.1.8 If the Vendor cannot provide a voice solution that supports VoIP to the expectations in Section 7.1, and this RFP (after State Bar of California's implementation of any LAN/WAN remediation or upgrades recommended by Vendor), and cannot rectify the problem per the section above, it will be considered a material breach of contract on the part of the Vendor. Vendor will allow the customer to return the complete system for a full refund, and remove the system once an alternate solution has been put in place by State Bar of California.

Response:

5.2 VOIP SPECIFICATIONS

- 5.2.1 What is the manufacturer's recommended best practice for CODEC choice, sampling rate, packet size, jitter buffer, etc? What bandwidth, including overhead and QoS, will each recommended CODEC require? What VoIP CODECs are supported on the platform, i.e. G.711, G.729A, G.729B, G.722, H.323, SIP, etc. (list all applicable)?

Response:

- 5.2.2 What is the highest common denominator Codec across all applications being quoted? Will calls require transcoding between applications (voicemail, call recording, etc.)?

Response:

- 5.2.3 Which CODECs are supported natively by the telephones? Will telephones auto-negotiate CODEC over the LAN/WAN when connecting between offices without the need for an intermediary translation or transcoding? If not, how is transcoding provided?

Response:

- 5.2.4 What network parameters are, or should be observed with the platform, i.e. 802.1p/q, Differential Services (DSCP), weighted fair queuing, Rapid Spanning Tree, VLAN pruning, device discovery, etc?

Response:

- 5.2.5 Do the telephones natively tag packets with both QoS (Layer 3 – IP Header) and CoS (Layer 2 – Ethernet Header) bits? Do all telephony servers and services automatically tag packets with both QoS and CoS bits? Which DSCP or IP Precedence tags are recommended by the manufacturer for voice RTP traffic and VoIP call control traffic?

Response:

5.2.6 Does the system provide an option of running SIP for a telephone's call setup? Does the Vendor propose using SIP or proprietary signaling for call setup? How are advanced features supported if using SIP telephones? If Vendor recommends deploying SIP telephones, how is call setup and teardown encrypted and secured?

Response:

5.2.7 Does the system support SIP trunks, SIP compliant gateways, or SIP telephones from other 3rd party manufacturers? Which manufacturers and telephone companies have been certified with the system? Describe any capabilities or limitations regarding the SIP implementation above or beyond the generic SIP feature set.

Response:

5.2.8 When a call is re-routed from the WAN to PSTN due to Call Admission Control, QoS monitoring bypass, or Call Suffle to PSTN (see **Attachment E**) what, if any, loss of features will be experienced? For instance, will a caller that is forwarding to voicemail when the call is re-directed over PSTN arrive at the correct user's mailbox and personal greeting?

Response:

5.2.9 Does the system support both IP hardphones and IP softphones being located behind a NAT device? Are IP-to-IP direct calls supported for NAT-translated IP hardphones and IP softphones? What is required to support SIP based phones through NAT traversal?

Response:

5.3 ENCRYPTION

5.3.1 Will the telephones being quoted encrypt the conversation between telephones, and between telephones and PSTN gateways? Are you quoting any equipment that will not support media path encryption? Will the system encrypt call setup control messages between locations and between the telephones and the Processor? Are you quoting any equipment that will not support encryption?

Response:

5.3.2 Does the Vendor recommend implementing encryption as part of their proposed solution? Why, or why not? The cost of implementing encryption should be included in the base price quoted.

Response:

5.3.3 What encryption techniques will be used? If the encryption method is certificate based, which server will mint certificates? How can certificates be managed by State Bar of California IT staff? How will encryption integrate with State Bar of California network security devices such as Active Directory, 802.1x and Radius servers?

Response:

5.3.4 How much latency is added to the call in encryption/decryption? Does encryption reduce the overall system capacity of the VoIP network? Does encryption restrict any system features or functionality (for example conference calls, ACD monitoring, call recording)?

Response:

6 VOICE MAIL PLATFORM

6.1 STATE BAR OF CALIFORNIA SPECIFIC REQUIREMENTS

- 6.1.1 It is imperative that any new voicemail platform be easy to use, easy to change greetings on, and require users to only press 1 button to access commonly used features.

Response:

- 6.1.2 Vendors are encouraged to evaluate a distributed versus a centralized voicemail system in their solution in order to guarantee sound quality and availability of the VM application to remote branches.

- 6.1.2.1 If you are quoting a distributed system, how will messages between locations be transferred, and how will the system present the users the appearance of being on a single voicemail system?

Response:

- 6.1.2.2 If you are quoting a centralized system, what bandwidth and system design considerations must be taken into account for remote branches (especially dealing with State Bar of California's proposed WAN and Exchange topology)? In a centralized VM system, how will callers reach the voicemail server and be automatically delivered to the correct mailbox if the WAN is not available or performing poorly?

Response:

- 6.1.3 State Bar of California has an extensive number of voicemail boxes, automated attendant trees, greetings, etc. in the current voicemail systems. Please comment on any tools you may have that would allow for the export of current mailbox data, automated call flows and trees, greetings, passcodes, names, messages, and greetings from the existing voicemail system and import into the new system. If this type of functionality is available, provide information on the tool and how it works.

Response:

- 6.1.4 The Vendor is required to set up two guest mailboxes on a demo system with integration to the PBX you are quoting so that we can test the user interface. **Please provide a phone number and login information below.** Please provide a copy of the voicemail quick reference guide on the following page and in the soft-copy of your proposal.

Response:

6.2 VOICE MESSAGING SYSTEM DESCRIPTION

- 6.2.1 Describe your voice messaging product offering. Include a brief overview of the hardware, software, architecture, and components of the equipment proposed to meet RFP requirements.

Response:

- 6.2.2 Is the voicemail built by the manufacturer of the PBX? If not please provide information regarding the OEM company, their history, and relation with the PBX manufacturer.

Response:

6.2.3 The Vendor is required to provide, install and maintain the computer platform for the voicemail. Please provide the specifications of the platform you will be providing.

Response:

6.2.4 What operating system does the voice mail system use? Vendor will be responsible for installing and maintaining the voicemail Operating Software – including security fixes and updates. How will this be accomplished?

Response:

6.2.5 What physical connection will be established from the voicemail to the phone system? If additional voice ports are required in the future, how is the hardware/software added? Explain how the system scales beyond the number of proposed ports.

Response:

6.2.6 Are voice messages stored in an industry standard format? How many Mbytes of disk space are required for each hour of voice storage?

Response:

6.2.7 When a back-up is performed what is backed up – programming, greetings, messages? Do back-ups happen automatically, and can they be directed to a NAS hard drive?

Response:

6.2.8 What, if any, limits are there to greeting, message or announcement length? What will the voice mail do if an individual mailbox is full? What will the remote caller hear? How will the user be notified and what options will the user have?

Response:

6.3 VOICE MAIL SECURITY AND ADMINISTRATION

6.3.1 Please describe the system administration interface for the voicemail. Can the voicemail be administered through the same interface as the PBX? Does it require separate sessions? Is system administration done through a standard web-enabled GUI? If so, which browsers does the administrative application support? If not, can the application be loaded on multiple PCs?

Response:

6.3.2 Users should be required to enter a password to access their voice mailbox. What is the minimum and maximum password length? Can it be different for different classes of users? Will the voicemail system prevent the use of trivial passwords such as sequential digits, repeating digits, and re-use of the extension number (i.e. 1234, 1111, 4567)?

Response:

6.3.3 Does the system track failed password entries in a single session and disconnect the caller? Does the system track failed password entries across multiple sessions and automatically lock the mailbox? Does the system create a log and alarms (SNMP, email, pager) based on failed log-on attempts?

Response:

6.3.4 Describe voicemail port, disk utilization and user status reports available. Include a sample of these reports in the appendix.

Response:

7 UNIFIED COMMUNICATIONS & CTI

Many telephone system manufacturers are beginning to group together applications that empower onsite and remote workers through a new paradigm referred to as Unified Communications. This umbrella term may include Unified Messaging, Find Me/Follow Me, Instant Messaging, Presence, Text to Speech access to emails, Speech Recognition access to system features, Computer Telephone Integration, etc.

7.1 STATE BAR OF CALIFORNIA SPECIFIC REQUIREMENTS

7.1.1 Unified Messaging requirements have been documented in the Critical Considerations section, [Attachment E](#), and below.

Response:

7.1.2 Voice Mail Discovery – State Bar of California is very interested in installing Unified Messaging, but concerned about voicemail messages being discoverable in the future. This is of particular concern if deleting the message from your voicemail does not permanently delete all copies of the message from all stores and backups. Allowing users to receive, forward, reply, save to personal folders, etc. within Outlook or Exchange may create a copy of the message on their local machine or Exchange that would be discoverable.

7.1.2.1 Will the proposed voicemail create the discovery issues above, when NOT running Unified Messaging?

Response:

7.1.2.2 Will the proposed voicemail create the discovery issues above, when running Unified Messaging?

Response:

7.1.2.3 How have you been able to avoid the discovery issues above for other firms that you have worked with?

Response:

7.1.3 Some users keep hundreds or thousands of messages in their Email Inbox. Will there be a degradation in the performance of the Voicemail/UM for these users? How does the system deal with very large mailboxes?

Response:

7.1.4 State Bar of California may be interested in an Instant Messaging and Presence application that would be easy to deploy and telephony centric. Please summarize the components and discounted/installed pricing to add desktop Instant Messaging, Collaboration, desktop video, presence, and buddy lists through the telephone system's native application or your recommended alternate. Provide optional pricing for all users on Schedule A.

Response:

7.1.5 Provide optional pricing for 50 users to allow the telephone system to automatically extend a phone call to their desk phone and their cell phone simultaneously, in such a way that the call can be answered at either device and still be able to access the features of the phone system such as transfer and conference.

Response:

7.1.6 Does the proposed solution provide the ability to highlight a phone number on an Internet page and have the call dialed by the phone system? Describe how this feature works, what components are required for this functionality, whether this functionality is included in the proposal as priced, and optional budgetary pricing if not included.

Response:

7.1.7 Does the system have the ability to provide a Voice Recognition Company Directory? Most smartphone users at State Bar of California are on Blackberry which does not provide letters over the number buttons to be able to dial by name from a company directory. Provide optional pricing below.

Response:

7.1.8 State Bar of California would like optional pricing on a 4 port, 50 user fax server. Describe the fax server functionality being quoted.

Response:

7.1.8.1 Can faxes be automatically directed by DNIS/DID to a user's personal mailbox? Will the presented document be a tiff or .PDF (preferred) file?

Response:

7.1.8.2 Can a user create and send a fax from their desktop using a custom cover page and a library of pre-existing documents? What format (word, .PDF, excel, etc.) can the pre-existing documents exist in?

Response:

7.2 UNIFIED MESSAGING

7.2.1 Please provide a general description of your Unified Messaging offering, including where its messages are queued and stored, physical connectivity to the phone system and Email Server (Exchange), logical connectivity to the Email Client (Outlook), server and desktop requirements, and architecture.

Response:

7.2.2 Does the system install an Email Client add-in to allow for message playback and management without having to open a 3rd party media player such as Windows Media Player? Does the user have the choice to play the message through their telephone, or through their PC speakers, while still controlling the call through their Email Client? Provide a screen shot of the software used to control Unified Messaging.

Response:

- 7.2.3 Briefly describe any advanced capabilities for text to speech playback of emails over a telephone interface, speech to text, voice control and Calendar/Task integration. Describe what upgrades are required to add these advanced features to the system you are quoting.

Response:

7.3 UNIFIED COMMUNICATIONS AND COLLABORATION

- 7.3.1 Describe any Unified Communications functionality available with the proposed solution. Please summarize the components and software required to add desktop Presence, Instant Messaging, Collaboration, desktop video, and buddy lists through the telephone system's native application or your recommended alternate. Vendor should state what, if any, Unified Communications functionality is provided in the base platform specifically. If possible, provide budgetary numbers for the application on a per user basis.

Response:

- 7.3.2 Describe whether the proposed system would allow for online collaboration, screen sharing, whiteboarding, presentations, etc. (similar to WebEx or LiveMeeting). Although this functionality is not required at present, provide general overview of how this functionality can be provided in the future.

Response:

- 7.3.3 Some phone systems include a built in conference bridge at no additional cost. These conference bridges tend to leverage existing telephony infrastructure and provide a "meet me" number that can be provided to callers to automatically bridge calls into a conference call. Some Manufacturers allow the use of passcodes, scheduled and reserved meetings, and meeting invitations; while other Manufacturers simply add each incoming caller to the bridge without the requirement for a passcode. Please describe any functionality that the quoted system will provide for this type of Meet Me Conference Bridge. Is this functionality included in the base price or optional?

Response:

7.4 COMPUTER TELEPHONE INTEGRATION

- 7.4.1 Will your click to dial application also support dialing from Microsoft "Smart Tags"; how is this functionality supported; and does it require additional licenses or hardware?

Response:

- 7.4.2 Briefly describe and price any other relevant CTI applications that could improve employee efficiency.

Response:

7.5 MICROSOFT OFFICE COMMUNICATIONS SERVER (OCS)

- 7.5.1 Does the system currently integrate with Microsoft Office Communications Server 2007 (OCS) or Lync, and Microsoft Office Communicator (MOC) or Lync client? If not currently available, what is the manufacturer's long-term vision regarding these integrations? OCS and Microsoft Lync are not being considered by State Bar of California at this time, but may be considered in the future.

Response:

7.5.2 How does the system integrate with Microsoft OCS and Lync? Describe architecture, licensing and integration method.

Response:

7.6 MOBILITY APPLICATIONS (FIND ME/FOLLOW ME)

7.6.1 Describe any functionality that the system has to ring a call to a person's cell phone and desk phone simultaneously. If the call is answered on the cell phone, how do you get the call back to the desk phone? If the call is answered on the desk phone, how do you extend the call to the cell phone? Will the user see the inbound caller's Caller ID or the PBX's Caller ID on the display of their cell phone?

Response:

7.6.2 Describe and provide optional pricing for any other Mobility applications, or abilities that the system can provide in order for an employee to manage where the phone system can expect to find them.

Response:

7.7 AD-HOC CALL RECORDING

7.7.1 Please describe any ability the system provides for users to record their phone calls by pressing a feature button. Is this functionality included in the base price or optional?

Response:

7.7.2 In order to meet recording notification laws, will the system play a greeting such as "Recording" or beep on the line every 30 seconds to indicate that the call is being recorded?

Response:

8 ACD – CALL CENTER

8.1 STATE BAR OF CALIFORNIA SPECIFIC REQUIREMENTS

8.1.1 Call Center Groups

State Bar of California has a number of departments that require Automatic Call Distribution (ACD) Call Center functionality. In addition, some groups have the requirement for specific skills such as language proficiency or the ability to cover for multiple groups. Skills with **proficiency ratings** are required so that more senior agents will handle more calls than junior agents that are still in training. The ACD system should direct calls to the most skilled, longest idle agent. Placing agents in multiple groups and using standard ACD call flow with Group overflows will not be accepted as a workaround to true Skills Based Routing.

Following is an example of current agent counts per location, and the departments they are assigned to.

ADDITIONAL INFORMATION PROVIDED UPON ACCEPTANCE OF NDA:

8.1.2 Call Center Requirements

State Bar of California’s ACD requirement are delineated in this RFP as well as in **Attachment E**. Specifically call out and address any partial or optional compliance from **Attachment E**, where the feature is “Required”. Additionally, address any non-compliant features where the feature is “Should Have but Optional”. Lastly, describe how the ACD functionality provided by the proposed solution will meet the specific requirements of State Bar of California.

Response:

8.1.3 Call Center Options

The following Call Center functionality is highly desired by State Bar of California but may not be available from all suppliers or at a reasonable price. For each of the items below state whether the proposed solution is compliant, whether the cost of the functionality is included in the base price or optional, if optional how much the functionality would cost, and a very brief description of how the functionality is provided.

- 8.1.3.1 ACD agents can make and receive personal calls on their phone that are not tracked as ACD calls and are able to forward to voicemail;

Response:

- 8.1.3.2 Automated Attendant options while waiting – caller should be able to listen to IVR, automated attendant menus or Music-on-Hold while waiting in queue.

Response:

- 8.1.3.3 Abandoned calls report that will allow agents to call back people that abandoned the queue.

Response:

- 8.1.3.4 Consolidated ACD reporting system that will pull information from the ACD system, the phone system, the voicemail, from 3rd party open standards databases, and from future CRM systems.

Response:

- 8.1.3.5 Provide pricing for Work Force Management software to allow automated scheduling of ACD agents and forecasting of staffing requirements on Schedule A for the Intake and MSC groups (30 agents);

Response:

- 8.1.3.6 Provide general pricing for Schedule Adherence module below, it should not be included in the optional pricing provided on Schedule A. Will software monitor agent adherence to schedule, compared to actual performance? Does your software allow the supervisor to build leeway into the adherence report so that deviations less than X minutes are not reported?

Response:

8.2 ACD QUESTIONS

- 8.2.1 Provide a general overview of how ACD call routing is achieved in your solution. Include a screen shot of a typical ACD call routing programming screen from the system administration console.

Response:

- 8.2.2 State Bar of California's ACD requirements are delineated in this RFP as well as in [Attachment E](#). If you have multiple software levels to your ACD solution, please explain which level you would recommend to satisfy our required functionality, and why you chose this level. Please include a chart that shows a comparison between the levels. Please specify and price the next higher level of ACD software as an option on Schedule A.

Response:

8.2.3 Indicate the maximum number of agents and supervisors your system can support with the software and hardware quoted. Specify any system capacity limitations for ACD components, including but not limited to:

	Capacity
Agents	
Routing scripts	
Skills	
Groups or Queues	
Lead Directory Numbers (used to direct traffic from DNIS to Queue)	
Simultaneous groups or skills per agent	
Agent priority levels within a skill or group	
Priority levels for Queues into a single group (standard, emergency, etc.)	
Number of groups/skills that a call/script can queue to simultaneously	
Built-in Reports (# of historical/# of real-time)	Historical = ? Real-time = ?
Please provide system limits for saving detailed historical data for each of the following (how many days, weeks, years of data can be kept):	
Interval/Hourly/Real Time	
Daily	
Weekly	
Monthly	
Yearly	

Response:

8.2.4 Describe and provide a screen shot of a supervisor real-time monitor PC screen that shows all agents, skills and variables that have exceeded threshold levels. Can the screen change color or generate an audible alarm when queue statistics exceed pre-determined thresholds?

Response:

8.2.5 Describe the system’s ability to have an Agent “dashboard” on the Agent’s PC with real-time ACD statistics? Please include screen shot. Is this functionality included in the quoted base price?

Response:

8.2.6 How is Expected Wait Time calculated? Can Expected Wait Time be announced to caller? Can ACD provide a bracketed wait time based on EWT calculation? For example, if the EWT is 2 minutes can the system play a message that states, “The expected wait time is 1 to 3 minutes.” Can system proactively route calls based on Expected Wait Time without waiting for the timer to elapse? Is this functionality included in the base pricing?

Response:

8.2.7 Can the system perform routing decisions based on user definable variables and Boolean logic? For example; if call priority is high, and the number of agents with proficiency of more than 5 is less than 2, then present call to overflow group 1.

Response:

8.2.8 Can the system allow programming changes to Queues/Vectors/Scripts to occur in an online environment with changes immediately implemented in the ACD call flow without having to restart the ACD or re-log agents? Will the system validate ACD scripts for breaks in logic prior to implementation?

Response:

8.2.9 If caller decides to leave a message, can that message be queued to an agent group as if it were a call, with appropriate ACD call flow and reporting?

Response:

8.2.10 What is required to support remote (home or VoIP) ACD agents? Will there be any functionality differences to directly connected agents? What is your recommended model for this functionality?

Response:

8.3 ACD REPORTING

8.3.1 Please provide examples of available reports on the CD that the Vendor will be burning with the response.

Response:

8.3.2 Does the quoted system provide all of the following standard reports?

8.3.2.1 Average call duration

8.3.2.2 Average talk time

8.3.2.3 Average time to abandon

8.3.2.4 Wait time (average and total)

8.3.2.5 Service level attainment

8.3.2.6 Detailed Call Log showing number called, hold time, who answered, who hung up, for each call from cradle to grave

8.3.2.7 Total number of received, answered and abandoned calls

8.3.2.8 Spectrum reports that show number or percentage of calls received and answered within 5 seconds, 10 seconds, 15 seconds . . .

8.3.2.9 Interval reports showing Queue and agent statistics for 15 minute periods

8.3.2.10 Delay before answering

- 8.3.2.11 Agent activity and productivity reports
- 8.3.2.12 Group/skill activity and utilization reports
- 8.3.2.13 Peak time reporting (daily, weekly and monthly) with historical trend analysis
- 8.3.2.14 Trunk group utilization reports
- 8.3.2.15 Automated Attendant tree reports (if provided through ACD) showing options chosen and points of transfer or hang-up.

Response:

- 8.3.3 Please discuss any limitations the system has regarding creating cradle to grave ACD reports from the moment that the call hits the phone system and is placed into queue, through automated attendant scripts, announcements, overflows, interflows, queuing to multiple groups, transferring to voicemail, being answered by an agent, being escalated to a supervisor or transferred to another agent, etc.

Response:

- 8.3.4 Describe the ability to create custom, user-definable reports from within the Call Reporting platform. What is the native call reporting engine for the reporting platform?

Response:

- 8.3.5 Can reports be scheduled to run automatically? Can they be sent to a network printer? Can reports be sent to a file? Will scheduler create a unique file name for each report and date?

Response:

- 8.3.6 Can reports be scheduled to automatically email to various people without human intervention?

Response:

- 8.3.7 Can reports be exported to Microsoft Excel, Access or other formats? Which?

Response:

- 8.3.8 Can the reporting database be accessed through Crystal Reports or other ODBC report writer? Describe.

Response:

8.4 ACD RECORDING

- 8.4.1 Describe the ACD recording application including hardware, software, voice quality codec, recording file name nomenclature, agent and supervisor interface, indexing system for finding archived recordings, and recording medium.

Response:

8.5 WORKFORCE MANAGEMENT

8.5.1 Please describe in general terms your solution for Workforce Management software. Please explain how the WFM interfaces with the ACD and ACD reporting package.

Response:

8.5.2 Can the software keep start and finish times fixed for scheduling and only adjust breaks and lunch? Can the software restrict that lunch and breaks only vary by X minutes from a standard plan?

Response:

8.5.3 Will WFM support “what if” analysis and modeling based on changing one variable and seeing the effect on the other variables such as required staffing levels and Grade of Service? Will WFM allow forecasting based on an analysis of current call volume trends compared to historical volumes?

Response:

8.5.4 Will software monitor agent adherence to schedule, compared to actual performance? Does your software allow the supervisor to build leeway into the adherence report so that deviations less than X minutes are not reported?

Response:

9 SYSTEM ADMINISTRATION REQUIRMENTS

9.1 STATE BAR OF CALIFORNIA SPECIFIC REQUIREMENTS

9.1.1 State Bar of California requires a system administration tool capable of supporting all offices within the enterprise from a single intuitive user interface. Ideally, this program will allow management of the phone system, voicemail, ACD, etc. from a single unified interface. Please describe all functions and applications the administration tools can support and include screenshots for each application.

Response:

9.1.2 Does the system support synchronization to Active Directory? If a user is added or a name change made in Active Directory, will it download to the telephony systems? If a user change is made in the phone or voicemail system, will it upload to Active Directory? Does Active Directory synchronization happen automatically, or must it be manually run? If this functionality is not included in your base pricing, please provide optional pricing where noted on Schedule A.

Response:

9.1.2.1 After the telephony servers recognize an addition or change from Active Directory, what additional steps must an administrator take to complete the creation of a new user in the telephone and voicemail servers?

Response:

9.1.3 The system should maintain a change log of programming changes and which administrator made the change.

Response:

9.1.4 Vendor should include tuition or course credits to a Manufacturer recommended and certified system administration training class for 4 State Bar of California administrators. Please describe the course syllabus, where it is offered and duration of the course.

Response:

9.2 SYSTEM ADMINISTRATION QUESTIONS

9.2.1 Describe the database which contains user programming information for the phone system, voicemail, and other major system components.

Response:

9.2.2 Generally describe how the programming database might be integrated with Client's current Active Directory, Email, and HR databases.

Response:

9.2.3 Can moves and changes be batched? That is, can changes be made to a number of subscribers or classes of service simultaneously? Can moves and changes be scheduled to run after business hours or when stations are not in use?

Response:

9.2.4 How is security provided to prevent unauthorized access to the administration application? Is there any limit to the number of administrative users that can be given access passwords? Can different administrators be given individualized permission levels? Can some administrative users be defined with “view-only” permissions? How many administrative levels can be defined?

Response:

9.3 SYSTEM MONITORING AND DIAGNOSTICS

9.3.1 What diagnostic tools, logs and reports are available to aid in isolating faults? Can diagnostics be remotely accessed? Are the system’s diagnostic tools SNMP compliant?

Response:

9.3.2 Describe the system alarms and alarm notification available from each sub-system. Will the system call home to the maintenance company; call Client designated phone numbers; send out pages to pagers; send emails, etc.?

Response:

9.3.3 Does the proposed system have the ability to monitor VoIP Quality of Service? Does this application simply monitor for underlying network issues (latency, jitter, packet loss) through the use of some kind of probe or error logs? Or, does it monitor actual phone calls through data provided by the telephones? If data is provided by the telephones, can it be monitored in real-time, or are the statistics sent at the end of a call? Can this data be exposed in a simple network management protocol (SNMP) management information base (MIB) for easy access with traditional network management system applications? Please provide a brief description, with screen shot, and include a full brochure in the appendix.

Response:

9.4 SOFTWARE UPGRADES AND PATCHING

9.4.1 The manufacturer must provide software updates to address security flaws in the OS and applications at no additional cost (other than labor to implement) during the warranty and maintenance period. Software updates during the installation process should be implemented by the Vendor at \$0 additional cost.

Response:

9.4.2 How does your company provide future software releases? Will the system need to reboot, or can these upgrades take place in an on-line environment? Briefly describe the process for installing a software update, and reverting to a previous software load if required. Specify for each major component proposed.

Response:

9.4.3 Is it possible to perform a software upgrade on a standby/redundant processor and then force a failover to minimize down time during a software upgrade? Is this functionality included in the base price? Can the 2nd processor stay on the old software level in case you need to revert to the previous software level?

Response:

10 IMPLEMENTATION REQUIREMENTS

10.1 STATE BAR OF CALIFORNIA SPECIFIC REQUIREMENTS

The entire "Implementation Requirements" section reflects the requirements of State Bar of California. Vendors should ensure that their proposal will meet the required Scope of Work in this section.

Response:

10.2 INSTALLATION

Please indicate your intended compliance with each of the following once you are awarded the contract. The plans and charts do not need to be created at this time.

- 10.2.1 **Responsibility** - The selected Vendor is solely responsible for the complete turn-key engineering of the new telecommunications system and all interconnecting facilities.
- 10.2.2 **Initial Work** - Vendor will perform needs analysis, station reviews, cutsheet database discovery, and original program initializations.
- 10.2.3 **Telco Coordination** – State Bar of California or Communication Strategies, working with the vendor, will coordinate the ordering of all local and long-distance communications facilities as deemed necessary.
- 10.2.4 **Installation** - Vendor will be responsible for placement and installation of all servers, gateways, telephones, and all other supplied hardware.
- 10.2.5 **Interconnection** - Vendor will be responsible for interconnection of all newly supplied equipment, including patchcords, patching, cross-connecting, plugging, Telco terminations, specialty wire harnesses, Amphenol tails, toning of analog cable, any required analog station patch panels or termination blocks, and any additional cables or wires required to connect the new telephone system to State Bar of California's house cable.
- 10.2.6 **Software Version** - Vendor will implement the most recent and stable version of all supplied software. If the manufacturer releases a software update to fix flaws, bugs, or security during the installation timeframe the Vendor will update State Bar of California's system at the earliest reasonable opportunity during a scheduled maintenance window. This maintenance window will be scheduled after hours for service impacting upgrades to an operational and partially deployed system at no extra cost to customer.
- 10.2.7 **Project Plan** - A master project schedule must be created, along with a work responsibility matrix, identifying the tasks the Vendor will perform and the tasks State Bar of California is expected to perform to successfully implement the new system.
- 10.2.8 Vendors must furnish all space, power, and environmental requirements for the proposed system equipment.
 - 10.2.8.1 Space – Provide the physical dimensions of all equipment that will not be rack mounted.
 - 10.2.8.2 Power – All power requirements, including any special conditioning or grounding requirements.
 - 10.2.8.3 Heat – Vendor must provide heat dissipation for proposed switch room and the recommended safe temperature operating range for the proposed system.
 - 10.2.8.4 Rack elevation - showing the number of U, and recommended stacking of the equipment that is being proposed at Head Office, and at each location.

Response

10.3 TRAINING

- 10.3.1 **Requirements** - The successful Vendor is required to include end-user training on State Bar of California premises, with classes grouped by phone type or job classification.

- 10.3.1.1 Training class sizes will not exceed more than 15 station users at a time.
 - 10.3.1.2 Each user should have access to a live telephone instrument during training.
 - 10.3.1.3 Classes should not exceed 60 minutes (45 minutes preferred)
 - 10.3.1.4 All users will require training on the new telephone system and voicemail
 - 10.3.1.5 ACD agents and supervisors should receive additional ACD specific training
 - 10.3.1.6 Operators will require training on the new attendant console(s). Training should occur away from the reception area prior to cut-over. On the morning of the 1st day of service, Vendor should provide personnel to assist the receptionist, as required, for a minimum of 2 hours.
 - 10.3.1.7 Six (6) users will require training on basic system administration for all new systems
 - 10.3.1.8 Two to three (2-3) weeks after the initial training, Vendor should conduct 2 sessions at Head Office for Power Users showing how to use all advanced functionality.
- 10.3.2 **Training Materials** - Vendor will provide a training program and soft-copy training materials for designated State Bar of California personnel who will train future employees. In addition, specify what computer based training materials are available and whether they are included in the base price.
- 10.3.3 **Quick Reference Guide** - Vendor will prepare a 1-2 page handout that shows how to use the most commonly used features of the phone system and voicemail.
- 10.3.4 **Desk-side Training** – Due to other commitments, it is often difficult to get Executives to attend training classes. For this reason, please add 1 full day, or 2 half days of trainer time starting the first day of service for walk-around and desk-side training at each location.

Please state your intended compliance with the section above.

Response

10.4 USER ACCEPTANCE TESTING

- 10.4.1 Vendor, Communications Strategies and State Bar of California will create a User Acceptance Test (UAT) plan that confirms the operation and resilience of all applications to the requirements specified in the RFP.
- 10.4.2 Vendor will test all installed equipment to manufacturer and vendor supplied test plans and correct all defects prior to UAT.
- 10.4.3 Vendor shall have lead technician and adequate support staff onsite for UAT system testing at least 1-2 weeks prior to going live with the telephony cutover.

Response:

10.5 CUTOVER COVERAGE

- 10.5.1 For each location cutover, it is expected that the lead engineer will physically attend onsite, and project manager will personally coordinate remediation onsite, until all reasonable punch-list items are resolved.
- 10.5.2 Vendor shall provide at least one onsite Project Manager for each locations cutover for trouble ticket prioritization, desk-side training, and overall coordination for 1 x 8 hour day beginning with the first day in service.
- 10.5.3 Vendor shall provide at least 1 onsite Lead Engineer for programming and trouble-shooting for at least 1 x 8 hour day beginning with the first day in service, and continuing onsite until all punch-list items are resolved.

- 10.5.4 After reasonable punchlist items are resolved, additional issues will be moved to an exception list and will be tracked by Vendor with an action plan, responsible person, and deadline for completion. Vendor will provide daily updates on the remaining exception list items.
- 10.5.5 State intended compliance with the requirements stated above.

Response:

10.6 SYSTEM ACCEPTANCE

System acceptance will be defined as follows:

- All equipment delivered and installed.
- All training completed
- All installation issues resolved to State Bar of California satisfaction
- All advanced features and software installed and tested, but not necessarily deployed
- Documentation representing the system "As Built" is delivered and reviewed with State Bar of California
- State Bar of California may agree to system acceptance with an acceptable exception list

State Bar of California expects that they will move from installation support to warranty/maintenance support only upon execution of a Delivery and Acceptance agreement. Please define if Vendor has a different requirement for the beginning of the warranty/maintenance period.

Response

11 WARRANTY, MAINTENANCE AND CUSTOMER SUPPORT

11.1 STATE BAR OF CALIFORNIA SPECIFIC REQUIREMENTS

11.1.1 **ALL** hardware, software, and installation labor provided by the Vendor or Manufacturer should be covered by a 1-year parts and labor replacement warranty or first year maintenance plan, including onsite support if required.

Response:

11.1.2 Warranty and maintenance should be covered by 24 hours X 7 days X 4 hour replacement Service Level Agreement on all core Telephone System hardware and software, including:

11.1.2.1 All Call Processors and Core Telephony servers and applications

11.1.2.2 Voicemail servers and applications

11.1.2.3 Call Center Servers responsible for routing calls

11.1.2.4 Voice gateways which terminate PRIs or T1s

Response:

11.1.3 8 hours X 5 days X Next Business Day Service Level Agreement on all other telephone system and data network hardware and software:

11.1.3.1 Non Core Telephony servers and applications – ACD reporting, Presence, etc.

11.1.3.2 Adjunct software applications

11.1.3.3 Voice gateways which terminate analog trunks/stations

11.1.3.4 Remote Survivable Branch processors and equipment (as long as users at the branch is still able to make and receive calls normally with a failure in this equipment)

Response:

11.1.4 Telephones do not require a maintenance contract; State Bar of California will maintain spares and purchase replacement telephones as required. However, please provide an optional price for 8x5xNBD maintenance of the telephones where indicated on the pricing form.

Response:

11.1.5 State Bar of California requires Single Point of Maintenance as part of the standard maintenance plan. This would provide comprehensive end-to-end support of incidents across multiple systems and is further described in section “Single Point of Maintenance” below. Please acknowledge below that SPOM is included in the proposed solution and pricing.

Response:

11.2 WARRANTY QUESTIONS

11.2.1 What is the manufacturer’s standard warranty period on hardware, software, and other equipment without the purchase of additional maintenance or warranty?

Response:

11.2.2 Which of the maintenance options available (Vendor vs. Manufacturer, and which service level) has been included in the base pricing for 1st year Warranty and 2nd year Maintenance support? Why?

Response:

11.2.3 Is post installation warranty/maintenance support available from the manufacturer? Please describe briefly the options available.

Response:

11.2.4 Is post installation warranty/maintenance support available from the installing Vendor? Please describe briefly the options available.

Response:

11.2.5 Is hybrid maintenance available where the Vendor provides Tier 1 support, help desk, advanced replacement and escalation but manufacturer provides hardware replacement, Tier 2+ support, and resolution of software issues?

Response:

11.2.6 All maintenance during the warranty period and under any maintenance agreements shall be performed by manufacturer certified personnel that are full time employees of a manufacturer certified Vendor.

Response:

11.2.7 Please describe your ability to provide routine system monitoring to assure the continued operation of all system components. Will the Vendor implement software or hardware that will “phone home” proactively to inform the Vendor that there is an alarm in State Bar of California’s infrastructure? Will the Vendor automatically notify the customer if there is a fault detected in the system? How (phone, pager, email, escalation trees), and how often during the incident response will the service provider provide updates to the customer?

Response

11.2.8 Describe any portals or reports where State Bar of California can view past and current service calls, and moves/adds/changes with detailed resolution notes.

Response:

11.2.9 Emergency service will be defined by the warranty/maintenance contracts to include resolving problems which interfere with the normal operation of the business, and include the failure of >10% of stations, >25% of trunks, any core telephony server, an attendant console, or a substantial sub-system of the Telephony system. Emergency service shall consist of remote diagnostics within 30 minutes of the origination of the service ticket. Service Provider will provide a four-hour onsite response time for emergency services. Service Provider should update State Bar of California with a completion notification for emergency services immediately upon resolution of problem.

Response

11.2.10 Response time for minor system problems should be 24 hours. Service Provider should complete routine requests for additions, deletions, and feature changes within 48 hours of request. Service Provider will respond with a confirmation of completion for routine service requests within 48 hours of fulfilling the request.

Response

11.2.11 Maintenance cost increases should be limited by the cost of living as measured by the Consumer Price Index.

Response:

11.3 SINGLE POINT OF MAINTENANCE

11.3.1 Describe any enhanced maintenance program available where the Provider is the single point of contact for any trouble calls originated by State Bar of California’s technical staff. Provider would provide a holistic approach to resolving system problems that would complement a replacement parts and labor type of warranty that would be provided by the previous section. This would be in addition to warranty in the first year, and as an extended warranty/maintenance plan for other years. This service should include, but not be limited to:

- 11.3.1.1 All aspects of the Warranty section above, plus:
- 11.3.1.2 Proactive monitoring and notification of outages
- 11.3.1.3 Tier 1 Technical Assistance Center that is manned 8x5
- 11.3.1.4 TAC technical support on-call through pager/email 24x7 with callback from a qualified technician within 20 minutes
- 11.3.1.5 Escalation to Manufacturer Tier 3 and higher support that is managed and coordinated by the Provider
- 11.3.1.6 Remote diagnostic connectivity into all contracted hardware
- 11.3.1.7 Coordinate complete incident response with State Bar of California, Manufacturer, Telco, and other Vendors as required
- 11.3.1.8 Comprehensive incident response even when the problem hardware is not under warranty (labor/hardware to repair out of scope hardware can be charged at pre-defined rates)
- 11.3.1.9 Helpdesk support for programming assistance to State Bar of California personnel that have completed Manufacturer recommended administration training
- 11.3.1.10 Periodic polling of all hardware to check error logs, utilization reports, system performance with hard-copy and soft-copy report provided to State Bar of California
- 11.3.1.11 Hardware replacement can be provided by Provider or Manufacturer as long as it meets the criteria above
- 11.3.1.12 Routine Moves Adds and Changes at a pre-defined chargeable rate
- 11.3.1.13 Ability to purchase blocks of hours at advantageous rates for future requirements

Response

11.3.2 Describe any additional features of your optional maintenance plans beyond what is delineated above.

Response

