



REQUEST FOR PROPOSAL ORACLE SUPPORT
Questions and Answers
July 26, 2021

No.	Bidder Question	State Bar of California Answer
1	What is the module wise head count of users?	Oracle HCM/Payroll/Time & Labor/Expenses: currently at ~650users Oracle Talent Acquisition: ~10 users Oracle Planning/Budget: ~60 users Performance Reporting: ~10 users Business Intelligence: ~10 users
2	What is the country wise operating hours (module wise)?	The State Bar of California's business hours are 8am to 5pm Pacific Time, Monday to Friday in Los Angeles and San Francisco, CA. The Oracle Cloud support window is currently 7am to 6pm Pacific Time, Monday to Friday, however, bidders should propose their recommended support hours.
3	Can you let us know the level of customization done for different modules of application?	The State Bar of California's customization included typical configurations to support US and California based rules and regulations covering tax, payroll/benefits including Union negotiated employee benefits, as well as benefits data exchange with various third party benefits providers/servicers.
4	What is the customization, development, deployment schedule process?	The State Bar of California operates 4 Oracle Cloud environments to manage development, testing, and deployment. Bidders should propose their recommended environments. There is no set deployment schedule, however, The State bar typically operates on a 2 week sprint schedule.
5	Would the latest version of Functional and Technical Design document be shared with us?	The State Bar of California will share this as part of transition planning
6	How many module wise in-house functional / technical resources are there?	The State Bar of California has a small but growing team of in house technical and functional resources. There is an Oracle lead in IT, Finance, HR, and Procurement at this time.

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7	Is there a check list available which has the list of customizations / build / configuration which would be used as a part of pre and post upgrade functionality validation exercise?	The State Bar of California will share this as part of transition planning
8	What are the tools currently being leveraged by you for ticket handling and management? Is Atlassian JIRA being used by you?	The State Bar of California uses Atlassian Jira, Confluence, and Zendesk for ticket management. In all cases, tickets for work must be created for tracking purposes. Historical ticket data from an instance of Remedy will also be made available as a part of this initiative.
9	What are all the channels through which the functional and technical team of the vendor would be engaged?	The State Bar of California uses E-mail, Zoom/Teams calls/video/chat as online support channels.
10	Can you kindly share technical integration / overall implementation architecture diagram which consists of all the implemented modules?	The State Bar of California will share this as part of transition planning
11	Can you explain in detail on the list of PaaS and IaaS modules which are in place?	Oracle currently hosts The State Bar of California's platform and infrastructure.
12	We understand from the RFP that there are integrations in place and PaaS is being leveraged, and can you provide more details on that?	The State Bar of California integrates with a variety of Benefit Providers such as Delta, VSP, etc. using SFTP for data transmission
13	What's the count of customized reports which are currently in place? Is there any critical report which would be shared to the Govt/Federal entities?	Current report counts by module: - Financials: ~10 - HCM: ~40 - Payroll: ~20 - Recruiting: ~10 - Procurement: ~10 Data exchange with government entities are considered critical as part of Quarterly and Year-end Reporting
14	What is the current volume of tickets handled by the support team per day?	The State Bar of California averages ~20 tickets per month on a rolling basis, with increases volumes during key events.
15	How often SRs are created with 'Oracle'?	The State Bar of California has been averaging ~5 SRs per month with Oracle
16	What is the preferred language for support towards interacting with the users?	The State Bar of California operates with American English
17	List of planned Projects scheduled for 2021	The State Bar of California plans and implements quarterly releases per Oracle, as well as typical business events such as Employee Open

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		Enrollment, Quarterly reporting, year end processing and reporting.
18	List of Major and medium Enhancements scheduled for 2021?	The State Bar of California does not have any major enhancements planned for 2021. We have upcoming Open Enrollment which could require small to medium enhancements.
19	List of Major and medium Interfaces planned to be developed for 2021?	The State Bar of California does not have any major interfaces planned for 2021.
20	List of new customized Reports to be developed for 2021.	The State Bar of California continues to add reporting and analysis to its implementation as needed.
	Financials and Payroll	
21	How many pay elements does the business have?	The State Bar of California will share these specifics as part of transition planning
22	How many deduction elements are currently there?	The State Bar of California will share these specifics as part of transition planning
23	Are you using retro pay as a functionality?	The State Bar of California does use retro pay functionality
24	How many balance dimensions are currently being managed?	The State Bar of California will share these specifics as part of transition planning
25	What is the process around End of Service Benefit (EOSB)?	The State Bar of California will share these specifics as part of transition planning
26	Are absences a part of payroll? If yes, how many types of absences are maintained?	The State Bar of California includes absences in payroll, there are ~15 types
27	What are the various salary options available (regular, bi-monthly, bi-weekly)?	The State Bar's payroll is run on a bi-weekly basis.
28	Are there contractual employees? If yes, please define contractual employees?	The State Bar's workforce includes contractual employees.
29	Are contractual employees defined by a separate pay roll category?	The State Bar of California will share this as part of transition planning
30	Define the available payroll categories?	The State Bar of California will share this as part of transition planning
31	Please define the payroll calendars.	The State Bar of California will share this as part of transition planning
32	Please define the summative years of Payroll Calendars (2,5,10)?	The State Bar of California will share this as part of transition planning
33	Has the system already executed compensation cycle? Are the users aware of compensation functionalities?	The State Bar of California has been in production for 16 months.
34	How many LOBs are defined?	The State Bar of California will share this as part of transition planning

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35	Define the available payroll categories?	The State Bar of California will share this as part of transition planning
36	Please define the payroll calendars.	The State Bar of California will share this as part of transition planning
37	Please define the summative years of Payroll Calendars (2,5,10)?	The State Bar of California will share this as part of transition planning
	HCM/HR	
38	Do you have shift plans? If yes? How many shift plans are currently in vogue?	The State Bar of California does include shift plans and will share this as part of the transition
39	Do you use time and attendance? If yes, what is the integration touch point between time and attendance and third-party system?	The State Bar of California does use time and attendance. There is no planned integration with 3rd party
40	Are you issuing Joining tickets?	Is this regarding a person "joining" the company? We do have Oracle's Recruiting module integrated with Oracle HCM.
41	Is there joining bonus as a part of recruitment process?	The State Bar of California will share this as part of transition planning
42	How many assignment categories / types are defined?	The State Bar of California will share this as part of transition planning
43	Does the business deploy secondary assignments?	The State Bar of California will share this as part of transition planning
44	Do you use position hierarchy or supervisory hierarchy?	The State Bar of California typically follows the supervisory hierarchy.
45	What is your purchasing hierarchy aligned to?	The State Bar of California will share this as part of transition planning
46	a. Do you use jobs, or do you use jobs and positions?	The State Bar of California will share this as part of transition planning
47	Do you follow the automatic number generation or manual number generation for employees?	The State Bar of California uses automatic number generation.
48	Do you have benefit plans and have those been implemented?	The State Bar of California has been in production for 16 months, including benefit plans.
49	Has the full set of employee records migrated / moved into the HCM system? If yes, have the employees started using HCM system?	The State Bar of California has been in production for 16 months
50	Is there any ongoing schedule process in place for core HR Module?	The State Bar of California has scheduled processes in place.
51	Is ESS/ MSS and HR transactions being ongoing or not?	The State Bar of California will share this as part of transition planning
52	Have all the functionalities on Core HR management been deployed or in place?	The State Bar of California has deployed Core HR.

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53	Has open enrolment been started?	The State Bar of California's open enrollment commences again in September 2021.
54	Is HR team member aware of all the open enrolment transactions?	The State Bar of California's open enrollment commences again in September 2021.
55	Has the performance appraisal module implemented? Has the appraisal cycle started or not? Does the system have approval mechanism configured in it?	The State Bar of California has configured performance modules, however they are not currently in use.
56	Are the users aware of all the performance related activities on par with the system functionalities?	See Question 55 above
	SCM	
57	Can you kindly provide us with the overall system flow architecture of the implemented SCM solutions?	The State Bar of California will share this as part of transition planning
58	How many business units are mapped to the system?	The State Bar of California will share this as part of transition planning
	Oracle BI	
59	Can you kindly let us know about the count of custom reports?	See Question 13 above.
60	How many users are using reports?	The State Bar currently has ~25 users of reports
61	In future are there any scope for creation of the new reports?	See Question 20 above.
	Integrations	
62	Currently is there any middleware in place? If yes, can you let us know more details on it?	The State Bar of California does not currently use middleware
63	Can you provide us with the current integration architecture?	The State Bar of California will share this as part of transition planning
64	If you are not using any middleware, can we assume that the integrations are developed using custom scripts by leveraging REST API / Web Services?	The State Bar of California does not currently use middleware and instead leverage standard alternatives. Oracle APIs for employee and department information are consumed
	Miscellaneous	
65	Have the employees started using all the stack of applications or a KT is required for them?	All employees of The State Bar of California are using the applications needed for their roles. Additional training and knowledge transfer is ongoing.
66	Is there any data master available for inventories and has it been integrated with the system?	The State Bar of California will share this as part of transition planning
67	How many vendors are mapped to the system and how the stock (items)	The State Bar of California will share this as part of transition planning

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	numbers are generated (Manual / Automated)?	
68	Please provide average number of support tickets per pillar per month. Pillar examples include Financials, EPM, HCM, PaaS, BI, Etc.	See question 14 above
69	Please confirm the level of required support. Level 2 and/or Level 3 (Level 3 assumes expert subject matter support for the functional area)	The State Bar of California provides Level (L1) help desk support. All other support to be provided by bidder.
70	Please confirm if the entire EPM suite is live in production (i.e. PBCS/EPRCS - Enterprise-wide planning, budgeting, forecasting, Budget Book and Financial Reporting)	The State Bar of California has been in production for 16 months.
71	What third party applications (internal or external) does the Cloud system interface with?	The State Bar of California uses Jitterbit is used for data exchange with internal State Bar systems in certain cases
72	What are your biggest challenges with Oracle Cloud Applications testing?	The State Bar of California does not use automated testing today, bidders can propose introducing this as part of their proposal
73	Are Cloud optimizations and/or enhancements likely to be required during the contract term?	The State Bar of California expects to continue to optimize and enhance the solution during the team of the support agreement.
74	Which business functional areas require the most support today?	The State Bar of California has identified payroll and benefits as areas where additional support may be required in the short term.
75	How many individuals of the State Bar technical team support the Oracle suite?	The State Bar of California currently has a small (<5) team supporting the Oracle suite, which will be evaluated and adjusted as a result of this initiative.
76	How many external Oracle consultants currently support the Oracle suite?	The State Bar chooses not to answer at this time.
77	How many of these individuals are full time resources	The State Bar chooses not to answer at this time.
78	a. What areas require full time resources? Is this cyclical?	The State Bar chooses not to answer at this time.
79	How many support and enhancement tickets are currently open with the external Oracle consulting team?	See question 14 above
80	Do you have any trend statistics that you can share regarding number of tickets typically logged in a day? Issue vs Enhancement?	The State Bar of California will share this as part of transition planning
81	How many employees does State Bar of CA have?	See Question 1 above.

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82	a. Are all of these employees entitled to benefits?	The State Bar of California will share this as part of transition planning
83	b. Do all of these employees use Time & Labor?	The State Bar of California will share this as part of transition planning
84	c. Do all of these employees use Oracle expenses?	The State Bar of California will share this as part of transition planning
85	Do you have an existing automated testing tool that you use?	See Question 72 above
86	How many resources are needed currently to support the SaaS applications (ERP, HCM, ORC, SCM, EPBCS, OAC)?	The State Bar of California asks bidders to propose the support model they recommend as requested in the RFP documents.
87	How many business processes pipelines are implemented in the SaaS applications?	The State Bar of California will share this as part of transition planning
88	What is the degree of complexity (low, medium, high) of the interfaces (or its equivalent in the Cloud) and a range of number of interfaces?	See Question 3 above
89	What are the average number of SR tickets/issues in last 3-6 months?	See Question 15 above
90	a. Current number of Oracle SR tickets	See Question 15 above
91	b. Average number of SR tickets/issues for the last 3-6 months	See Question 15 above
92	c. Application/Severity	See Question 15 above
93	Is the State Bar looking for 24x7 Monday-Friday support?	See Question 2 above
94	How will incident and change management be handled?	The State Bar of California asks bidders to propose the support model they recommend as requested in the RFP documents.
95	Will the State Bar of California make business domain knowledge experts available to support functional testing of the applications?	The State Bar of California business / functional team members support testing.
96	Can the State Bar describe its internal IT team structure as far as who will be involved in management of the new solution (i.e., BAs, tech developers, etc.)?	See Question 6 above
97	What is the user count for each of the SaaS applications (ERP, HCM, ORC, SCM, EPBCS, OAC)?	See Question 1 above.
98	Where is the user base primarily located?	See Question 2 above

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99	For the PaaS environment, what is the number of instances in scope and average data size?	See Question 4 above
100	For PaaS, do you have your own OCI tenancy?	The State Bar of California has its own OCI tenancy.
101	Are any modules/areas of the current project experiencing challenges?	See Question 74 above
102	Do we need to support any other/external systems apart from Oracle? Modules needed for support?	The State Bar of California has limited the scope of this initiative to Oracle and related interfaces.
103	PAAS support – Integration tool (OIC or SOACS etc.) and total number of integrations?	The State Bar of California has requested support for all aspects of its Oracle implementation.
104	PAAS Support – Do we have Analytics or any other PAAS offering?	The State Bar of California has requested support for all aspects of its Oracle implementation.
105	Does this support include IAAS (Infrastructure – Admin/WebLogic)?	The State Bar of California has requested support for all aspects of its Oracle implementation.
106	Do you have any existing ticketing system (ServiceNow, Jira etc.) where you could pull the ticket volume data including filters like Object Type, Module etc., for last 1 year?	See Question 8 above.
107	Does this support include Functional, Technical and Admin team members?	The State Bar of California is requesting support for all Oracle functions.
108	Total number of client team members that are currently supporting cloud?	The State Bar of California will share this as part of transition planning
109	24x7 Support or UK hours (4 to 5 hours overlap with CST) or US hours?	See Question 2 above
110	Estimate number of hours for support (like 100/200-hour bucket), or are you looking more of time and material?	The State Bar of California asks bidders to propose the support model they recommend as requested in the RFP documents.
111	Do we need to support quarterly SAAS updates/Upgrades (Testing) from Oracle?	See Question 17 above
112	How many business users typically get involved during your Oracle Cloud patch testing cycle?	The State Bar of California business users engage as needed depending on the contents of the release cycle. This is typically a small group, <10 users, again depending on the contents of the release.
113	How many test scripts/scenarios are manually executed during each patch testing cycle?	The State Bar of California varies the numbers of test scripts executed to validate no loss of functionality in the planned release.
114	What was the last patch uptake for your Oracle Cloud Applications?	The State Bar of California is now, and typically remains, current with all Oracle releases and patches.

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115	<p>The RFP states that ‘Bidder must have an Oracle Partnership with an earned level of “Cloud Premier” or higher: Oracle has recently revamped their Oracle Partner Network and I understand that the previous levels of Silver, Gold, Platinum, Cloud Premier, etc.. are no longer used. The new designation is Build, Sell and Service Expertise Partner. Likely many (if not all) of the bidders on this RFP will have this designation now, and no longer retain the designation of Cloud Premier.</p>	<p>Bidders in the Oracle Partner Network who are using the Earned Expertise system instead of the tier system must have achieved Expertise, and preferably Advanced Expertise, in the Oracle Cloud Service Track. Bidders must provide details of the Expertise and Qualifiers they have completed/achieved in order to earn their Expertise or Advanced Expertise level with Oracle Cloud Service.</p>
116	<p>Bidder must have an Oracle Partnership with an earned level of “Cloud Premier” or higher, as well as employee certifications as required to perform the duties described in this RFP. Would it be allowed to respond as a Oracle Cloud Standard partner?</p>	<p>See Question 115 above</p>
117	<p>Would it be possible to extend the due date of the RFP a week or 2?</p>	<p>The State Bar of California will extend the RFP Response Due Date from July 30th to 3:00 PM on August 3rd, 2021</p>
118	<p>We are no longer participating in the Oracle Partner Network’s former tier levels of standard, select, premier, and elite, but are using Oracle’s new Earned Expertise system. What are the requirements under this system?</p>	<p>See Question 115 above</p>