Professional Services

Detailed SKU Descriptions

Contents

Setup Services

Bundled Setup Services

Below is a guide to the various Professional Services "Bundles" SKUs that are created to provide customers with all the various pieces of suggested setup services based on their related product purchase.

Standard Setup (PS-IDN-STD-SETUP)

Standard setup is a combination of two (2) Setup Services described below:
- IdentityNow Setup without Delivery Assurance
- IdentityAI Access Modelling

Business Cloud Setup (PS-IDN-BIZ-SETUP)

Business Cloud Setup is a combination of two (2) Setup Services described below:
- IdentityNow Setup
- IdentityAI for IdentityNow Setup Lite

Business Plus Cloud Setup (PS-IDN-BIZPLUS-SETUP)

Business Plus Cloud Setup is a combination of three (3) Setup Services described below:
- IdentityNow Setup
- IdentityAI for IdentityNow Setup
- Cloud Infrastructure Entitlement Management for IdentityNow Setup

Individual Setup Services

IdentityNow Setup (IDN-SETUP)

The *IdentityNow Setup* will help customers quickly achieve value from their investment in IdentityNow within the first three months of the license deal.

Includes:
- Establish Base Connections

- Delivery Assurance (3 months)
- Cloud Rule Reviews & Rule Deployment (12 months)[1]

Setup Services is not a replacement for implementation services but is intended to provide a foundation to connect to IdentityNow and provide SailPoint's oversight of the proposed solution.

Establish Base Connections
As part of the Establish Base Connections, SailPoint will assist during virtual appliance configuration, test the virtual appliance connectivity by connecting one authoritative source and one directory source, show how to create identity profiles (10 attributes with one-to-one mappings & basic transforms), branding and SSO configuration (either pass through or SAML based SSO). SailPoint will not perform any implementation activities outside the scope of Establish Base Connections.

Delivery Assurance
As part of Delivery Assurance activities, SailPoint offers one hour consultation calls each week with the Professional Services team for three months from the Quote Effective Date. These consultation calls are reserved for use cases reviews, architecture & technical solution reviews, test plan review, and go-live plan reviews. Not applied for Standard setup (PS-IDN-STD-SETUP).

Rule Reviews & Deployment
All rules deployed in the IdentityNow cloud infrastructure (tenant) must be reviewed and deployed by the SailPoint team to be compliant with SOC and ISO guidelines. SailPoint is not responsible for the business logic, or the functionality achieved by these rules. SailPoint will only provide reviews to make sure the tenant health is not compromised after deploying a cloud rule. Customer has one year from the Quote Effective Date to engage SailPoint to perform rule reviews & deployment.

These services do not include any travel or other reimbursable expenses. The package will expire one year from the Effective Date. Following the expiration of these services, Customer will not be entitled to a refund for any remaining purchased but unused hours of the Professional Services.

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[1] Unlimited rule reviews are valid only for clients purchasing IdentityNow Setup January 1, 2023 or later. Clients who purchased IdentityNow Setup prior to 2023 receive 10 hours of time towards the rule review and deployment process to be used within 12 months of contract Effective Date

IdentityAI for IdentityNow Setup (IDN-IAI-SETUP)

IdentityAI for IdentityNow Setup is an all-in-one package covering all 3 AI modules: Includes setup services for Access Insights, Access Recommendations, and Access Modeling on AI. These are required services for AI and must be delivered by SailPoint Professional Services.

Includes:
- IdentityAI Access Insights
- IdentityAI: Access Recommendations
- IdentityAI: Access Modeling

IdentityAI for IdentityNow Setup Lite (IDN-IAI-SETUP-LITE)

IdentityAI for IdentityNow Setup Lite is an all-in-one package covering two (2) AI modules: Includes setup services for Access Insights and Access Recommendations.

Includes:
- IdentityAI Access Insights
- IdentityAI: Access Recommendations

IdentityAI Module Setup Services

IdentityAI: Access Modeling (PS-IDN-AXM-SETUP)

Access Modeling for IdentityNow or IdentityIQ Setup focuses on the initial setup and configuration of the Access Modeling module within the IdentityNow or IdentityIQ environment.

Access Modeling focuses on simplifying the analysis and discovery of roles to accelerate role creation and allow for more efficient provisioning and access review.

Includes:
- Analysis and configuration of Access Modeling
- Remote Access Modeling Workshop (up to 10 hours)
- Up to five (5) usage training sessions up to one hour each
- Testing support

Cloud Infrastructure Entitlement Management Setup for IdentityNow (PS-IDN-CIEM-SETUP)

Cloud Infrastructure Entitlement Management Setup focuses on the initial setup and configuration of Cloud Infrastructure Entitlement Management and integration with IdentityNow. The Cloud Infrastructure Entitlement Management deployment does not include the configuration of cloud service providers and IdentityNow.

Includes:
- Configuration of user access
- Support in security reviews of solution
- Validate basic use cases in both CIEM and IdentityNow
- Configure cloud service provider accounts
- Monitor collection of inventory and access relationships
- Usage training
- Testing support

Data Access Security Setup

Data Access Security rapid deployment is focused on both configuration and customer enablement and is designed to help customers achieve value as fast as possible. The primary goal is to configure best practice use cases and ensure customer teams are knowledgeable about how to use the information provided by Data Access Security to provide value to the business.

Includes:
- Assistance with basic configuration of Data Access Security, endpoints and best practice use case
- Best practice use case deployment (implementation, results interpretation, and best practice consultation)
- Basic Knowledge Transfer/Training

  This project is estimated to take up to six (6) weeks and includes 80 hours of Professional Services, which are valid for twelve (12) months from the effective date.

File Access Manager Rapid Deployment Small

The *File Access Manager RDP Small* will focus on installing File Access Manager in the customer's environment, connecting to the sources of unstructured data, and beginning to collect information about the monitored applications.

Includes:
- Connection of one (1) identity source and up to five (5) unstructured data sources
- An assessment of issues related to permissions, activities, and sensitive data
- Configuration of up to 10 total out of the box reports, policies, or alerts for ongoing management of unstructured data

The project is estimated to take twelve (12) weeks and include 300 hours of Professional Services, which are valid for twelve (12) months from the effective date of the Agreement.

File Access Manager Rapid Deployment Large

The *File Access Manager RDP Large* deployment will focus on installing File Access Manager in the customer's environment, connecting to the sources of unstructured data, and beginning to collect information about the monitored applications. The second stage of the engagement will focus on advanced File Access Manager use cases – Access Reviews, Access Requests, and/or Data Owner Elections.

Includes:
- Connection of one (1) identity source and up to ten (10) unstructured data sources
- An assessment of issues related to permissions, activities, and sensitive data
- Configuration of up to 10 total out of the box reports, policies, or alerts for ongoing management of unstructured data
- Configuration of any of the following advanced use cases up to the contracted hours
  - Up to 3 certifications
  - Access fulfillment
  - Enablement of access request
  - Data owner elections

The project is expected to take sixteen (16) weeks and include 600 hours of Professional Services, which are valid for twelve (12) months from the effective date of the Agreement.

Access Risk Management Lite Setup Services for IdentityNow

The Access Risk Management Setup for IdentityNow is focused on the initial setup and configuration of Access Risk Management within the IdentityNow environment.

Includes:

- Introduction and Setup
    - Provide client with prerequisites to begin engagement
    - Assist with setup of virtual machine and SAP user IDs
    - Set up and configure agents
    - Introduction session to Access Risk Management
    - Ensure prerequisites are completed
    - Set up enablement sessions
    - Q&A session to be conducted with SailPoint Architect and client
- Enablement (initial session)
    - Access Analyzer enablement
    - Reporting overview
- Follow-up sessions
    - Up to three (3) enablement sessions as requested by client
- Integration
    - Gather Access Risk Management specific details and input into IdentityNow (Customer ID/ARM Base API URL/ARM API Credentials/ARM system ID for each SAP instance)
    - Test connectivity between IdentityNow and Access Risk Management

Access Risk Management Setup Services for IdentityIQ

The Access Risk Management Setup for IdentityIQ is focused on the initial setup and configuration of Access Risk Management within the IdentityIQ environment.

Includes:

- Introduction and setup
    - Provide customer with prerequisites to begin engagement
    - Assist with setup of virtual machine and SAP user IDs
    - Set up and configure agents
    - Introduction session to Access Risk Management
    - Ensure prerequisites are completed
    - Set up enablement sessions

- o   Q&A session to be conducted with SailPoint Architect and customer
- Enablement (initial session)
    - o   Access Analyzer enablement
    - o   Reporting overview
- Follow-up sessions
    - o   Up to three (3) enablement sessions as requested by customer
- Integration
    - o   Install Access Risk Management Integration plugin
    - o   Gather Access Risk Management specific details and input into IdentityIQ (Customer ID/ARM Base API URL/ARM API Credentials/ARM system ID for each SAP instance)
    - o   Test connectivity between IdentityIQ and Access Risk Management

Assumptions for Access Risk Management Services

- These services include a "bucket" of hours to be used for Access Risk Management configuration and assistance.
- These services are available for use for one (1) year from Effective Date.
- Access Risk Management Setup Services focus on the initial setup, configuration, and enablement of Access Risk Management. Advisory services, business consulting, or enablement sessions beyond those listed here and are not included in the scope of this engagement.
- Integration work included in this SOW is limited to configuration within the Access Risk Management application. Any work required on the IdentityIQ or IdentityNow application is not included.
- Implementation services for access request functionality in IIQ or IDN is not included.
- It is assumed that all SAP instances requiring Access Risk Management analysis are already onboarded in IdentityNow or IdentityIQ.

Platinum Plus Annual Support (SPT-PLATINUMPLUS)

Prerequisite: *Premium Support*

Includes:

- Severity coverage: 24 hours a day, 7 days a week
- Dedicated senior support team
- Technical Account Manager
- Includes one Identity CheckUp per year
- Includes root cause analysis as appropriate

- Issue prioritization, RCA reporting, proactive notification, maintenance review

Business Cloud Quick Start – Small (PS-BIZCLOUD-QS-S)

Business Cloud Quick Start - Small is an all-in-one package IDENTITYNOW initial setup + all AI modules and basic implementation use cases. It includes Established Base Connections, delivery assurance (3 months) and rules assistance for IDENTITYNOW. Includes setup services for Access Insights, Access Recommendations, and Access Modeling for AI. It also includes configuration of three (3) additional, out of the box (OOTB) productized or delimited file connectors, Compliance Manager, and one (1) Certification Campaign (choose one (1) from manager campaign, source owner campaign, or search certification).

Includes:
- [IdentityNow Setup](#)
- [IdentityAI for IdentityNow Setup](#)
- Configuration of three (3) additional OOTB Sources (must be productized connectors or delimited file connectors)
- Configuration of Compliance Manager
- Configuration of one (1) Access Certification Campaign
  - [Choose one (1) from: manager campaign, source owner campaign, or search certification campaign](#)

Business Cloud Quick Start – Medium (PS-BIZCLOUD-QS-M)

Business Cloud Quick Start - Medium is an all-in-one package IDENTITYNOW initial setup + all AI modules and basic implementation use cases. It includes Established Base Connections, delivery assurance (3 months) and rules assistance for IDENTITYNOW. Includes setup services for Access Insights, Access Recommendations, and Access Modeling for AI. It also includes configuration of three (3) additional, OOTB productized or delimited file connectors, Compliance Manager, and one (1) Certification Campaign (choose one (1) from manager campaign, source owner campaign, or search certification) as well as Provisioning, with Joiner and Leaver Lifecycle Events.

Includes:

- [IdentityNow Setup](#)
- [IdentityAI for IdentityNow Setup](#)
- Configuration of three (3) additional OOTB Sources (must be productized connectors or delimited file connectors)
- Configuration of Compliance Manager
- Configuration of one (1) Access Certification Campaign
    - Choose one (1) from: manager campaign, source owner campaign, or search certification campaign.
- Configuration of Provisioning Lifecycle events
    - Joiner and Leaver events

Expert Services

SailPoint Expert Services are available to help with both implementation tasks and ongoing mentoring of SailPoint solutions.

Includes:

- Assistance up to the quoted number of hours from SailPoint services resources

Terms

- Services must be paid in advance
- Resources work Monday thru Friday from 9am-5pm in their local time zones, excluding holidays
- Specific time may be booked in advance (e.g., every Monday from 9-11am)
- Pricing does not include Travel & Expense (T&E)
- The Project Manager's time will be billed to the Project Management and Oversight task on the project and will equal 5% of the total time for the SOW. Project Manager time is non-transferrable to other Resource Roles.

Professional Services Reviews

IdentityIQ CheckUp

The *SailPoint IdentityIQ CheckUP* reviews the customer's current IdentityIQ deployment and identifies ways to improve product performance and configuration to align with SailPoint best

practices. The review generally takes between three (3) and four (4) weeks and can be conducted onsite or remotely. This includes pre-flight planning, onsite investigations and analysis, and preparation of the CheckUP report documenting the identified issues and suggested remediation. Pricing does not include Travel and Expenses (T&E).

All implementation services purchased must be used within one (1) year from the Effective Date.

IdentityNow CheckUP

The *SailPoint IdentityNow CheckUP* reviews the customer's current IdentityNow deployment and identifies ways to optimize the solution's configuration. The review generally takes between one (1) and two (2) calendar weeks. The review is typically performed remotely and includes project planning, analysis, and preparation of the CheckUP report documenting the identified issues and suggested remediation. Pricing does not include Travel and Expenses (T&E).

All implementation services purchased must be used within twelve (12) months from the effective date of the Agreement.

IdentityNow Delivery Assurance

Delivery Assurance is a short term engagement / light engagement to provide our SaaS customers with strategic advice during their Identity Governance modernization. The package comes with four (4) advisory workshops and one (1) tenant implementation assessment. These four (4) workshops will include topics from the following areas

- o Identity Security Cloud New SaaS Features
- o Identity Security Cloud Maturity Assessment
- o Identity Security Cloud Roadmap Planning
- o Project & Program Planning
- o Role Based Access Control
- o Migration planning
- o Integration focused workshops (SAP, EPIC, ServiceNow, CyberArk etc.)
- o Application onboarding program planning
- o Standard Operating Procedures

All implementation services purchased must be used within one (1) year from the Effective Date of the Agreement.

IdentityAI Advisory Services

The SailPoint IdentityAI Advisory Services are focused on providing customers with technical and advisory assistance during their ongoing usage of SailPoint's AI-Driven Identity Security product. SailPoint will assist the customer by providing as-needed services to maximize product value and provide continued guidance throughout the SailPoint AI-Driven Identity Security journey.

IdentityAI Advisory Services (PS-IDN AI-AS-PREM, PS-IIQ AI-AS-PREM)

The IdentityAI Advisory Services includes in-depth assistance as outlined below. It does not include Access Modeling guidance. Customer will also have access to a consistent resource that can help address the customer's unique business needs.

Includes:

- Monthly reports sent to Customer detailing work completed over the past month
- Customer specific report creation and modifications, in addition to configuration from customer-defined requirements
- Business intelligence and actionable insights from standard and customer specific visualizations
- Identity mapping changes
- Up to two (2) half hour basic product usage trainings per month
- Tuning of Access Recommendations (*if Access Recommendations purchased by the customer*)
- Identity outlier identification, research, and recommendations
  - Recommendations for high impact areas to target for initial role discovery and next areas of focus for role discovery
  - Validation of customer role discovery and assistance with implementing discovered roles (if customer owns licensing for the Access Modeling module)
    - Up to four (4) Role Discovery recommendations per month
    - Up to four (4) Role Insight recommendations analyzed per month
  - Working sessions to help utilize IdentityAI to solve business challenges unique to Customer's organization and/or industry
  - Role testing support and guidance
  - Review new product features, plus recommendations on how to best utilize them
  - Collector monitoring and recommendations

- Data quality checks (any remediation would be in separate statements of work)

Expectations and Assumptions IdentityAI Advisory Services

- Customer Expectations
  - Customer shall, at a minimum, have Access Insights. Any tasks associated with Access Recommendations or Access Modeling requires those modules.
  - Customer may submit multiple requests at once, but they shall be prioritized by Customer ahead of time
  - Customer shall notify the SailPoint IdentityAI Advisory Services team of any shifting priorities as soon as priorities change
  - Customer shall provide a single point-of-contact (POC) or dual POCs for the SailPoint IdentityAI Advisory Services team with which to work
  - Requests are typically completed on a first in, first out basis. However, prioritization can be a factor in when tasks are completed.
  - Customer shall provide access to tenants for SailPoint (at minimum production)

- SailPoint Expectations
  - SailPoint will set up and provide an introduction call with the customer to outline the service
  - SailPoint will endeavor to provide a consistent resource for the Premium Tier to perform the service. However, due to shifting responsibilities and efforts to increase response time and provide an excellent level of service, other resources may be used
  - SailPoint will not be providing a full-time resource. Resources assigned will be on an as needed basis
  - Services are to be provided remotely during SailPoint business hours. SailPoint resources work Monday through Friday from 9 am to 5 pm in their local time zone, excluding holidays
  - Monthly reports will be provided within three (3) business days of an agreed upon date each month. If time out of the office interferes, the report will be provided before or after the aforementioned timeframe on an agreed-upon date

IdentityNow Advisory Services Lite

IdentityNow Advisory Services Lite is designed to provide our SaaS customers with strategic advice and technical assistance during their Identity Governance modernization / transformation journey and help with adapt new features within SailPoint Atlas platform.

Includes:

- Advisory Workshops on
    - Identity Security Cloud New SaaS Features
    - Identity Security Cloud Maturity Assessment
    - Identity Security Cloud Roadmap Planning
    - Project & Program Planning
    - Role Based Access Control
    - Migration planning
    - Integration focused workshops (SAP, EPIC, ServiceNow, CyberArk etc.)
    - Application onboarding program planning
    - Standard Operating Procedures
- Tenant Ops
    - Two (2) comprehensive Tenant Implementation assessments & recommendations with two (2) critical remediations
    - Monthly Tenant Operational assessments and recommendations
- Value added Services
    - Unlimited Rule Reviews
    - One go-live support (Includes weekdays after hours from 5pm to 8AM next day and weekends 5pm Friday to 8AM Monday)
- Train the trainer model by onboarding three (3) sources/integrations (SaaS 2.0 connectors, Integration modules like ServiceNow Catalog, ITSM, EPIC, PAM etc.,)

IdentityNow Advisory Services Full

IdentityNow Advisory Services Full is designed to provide our SaaS customers with strategic advice and technical assistance during their Identity Governance modernization / transformation journey and help with adapt new features within SailPoint Atlas platform.

Includes:

- Advisory Workshops on
    - Identity Security Cloud New SaaS Features
    - Identity Security Cloud Maturity Assessment
    - Identity Security Cloud Roadmap Planning
    - Project & Program Planning
    - Role Based Access Control
    - Migration planning

- Integration focused workshops (SAP, EPIC, ServiceNow, CyberArk etc.)
    - Application onboarding program planning
    - Standard Operating Procedures
- Tenant Ops
    - Two (2) comprehensive Tenant Implementation assessments & recommendations with four (4) critical remediations
    - Monthly Tenant Operational assessments and recommendations
- Value added Services
    - Unlimited Rule Reviews
    - Two (2) go-live supports (Includes weekdays after hours from 5pm to 8AM next day and weekends 5pm Friday to 8AM Monday)
- Train the trainer model by onboarding six (6) sources/integrations (SaaS 2.0 connectors, Integration modules like ServiceNow Catalog, ITSM, EPIC, PAM etc.,)

General Advisory Services Terms & Conditions for IdentityNow & IdentityAI Advisory Services

- IdentityNow & IdentityAI Advisory Services includes the support of Professional Services management to allocate the correct resource(s) and provide regular oversight of and assistance for the requests submitted by Customer
- As product enhancements and/or products come out, IdentityNow & IdentityAI Advisory Services may continue to service Customer to include new products and services based on resource availability and priorities. However, future offerings and pricing may be affected by such changes, including prices at renewal
- Both Sandbox and Production environments are within scope
- SailPoint reserves the right to decline service requests if they aren't aligned with the service scope and/or resource capabilities.