



Professional Services Detailed SKU Descriptions



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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 Modeling](#)

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



- 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

Delivery Assurance is a short-term, light version of our Advisory Services providing our SaaS customers with strategic advice during their Identity Governance modernization. The package may include:

- Designated Account Team
 - Project Manager
 - Technical Advisor
 - Solution Architect / Deployment / Implementation Engineer
- Weekly
 - Strategic Workshops program initiatives, New Product Features, Roadmap, and specialized integrations like EPIC, SAP, CyberArk, ServiceNow, NERM, DAS, etc.
 - Tenant Implementation Analysis: To perform a review of any failed activities, events and/or any other day to day ISC operations and provide recommendations.
- Monthly
 - Tenant Diagnostics: To perform an Implementation Assessment review of any newly onboarded connectors, use cases, and provide SailPoint implementation best practices and recommendations as needed.
- Bi-Annually
 - Remediations of critical implementation issues

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



- Application Onboarding/Integration Assistance: Onboard application/source/integration into ISC with SailPoint best practice recommendations
- Access to Quick Start Templates through SailPoint Services built Front Door Engine for rapid application onboarding.
- Annually
 - Audit Assistance to help provide the right information to the auditors.
 - Deep-dive Implementation specific maturity assessment and provide a top-level view of achieved value and redefine priorities if needed.

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 the 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 will have 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.

IdentityAI for IdentityNow Setup (IDN-IAI-SETUP)

IdentityAI for IdentityNow *Setup* is an all-in-one package covering the base configurations required for all 3 AI modules – Access Insights, Access Recommendations, and Access Modeling. These are required services for AI and must be delivered by SailPoint Professional Services. These services will be set up in a maximum of 2 environments.

Includes:

- Initial setup of production and sandbox tenants
- Configuration of SSO Authentication
- Analysis and configuration of attribute mappings
- Analysis and configuration of Access Recommendations
- 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 for customer generated and executed test plans



IdentityAI: Access Insights (PS-IIQ-AXI-SETUP)

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

Includes:

- Initial setup of production and sandbox tenants
- Configuration of SSO Authentication
- Health and Data Quality Check. *Note: Any remediations needed will be scoped and are outside the scope of this engagement*
- Analysis and configuration of attribute mappings
- Up to five (5) usage training sessions up to one hour each
- Testing support for customer generated and executed test plans

IdentityAI: Access Recommendations (PS-IIQ-REC-SETUP)

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

Access Recommendations focuses on simplifying and scaling identity governance by helping customers get clear recommendations of who should have access during access reviews and requests. It provides increased visibility to foster improved revocation rates over time via certifications to increasingly reduce the amount of outlier access in the organization.

Includes:

- Analysis and configuration of Access Recommendations
- Up to five (5) usage training sessions up to one hour each
- Testing support



IdentityAI: Access Modeling (PS-IDN-AXM-SETUP and PS-IIQ-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 (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 (PS-IDN-DAS-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)
- Enablement sessions

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 (PS-FAM-RDP-SM)

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:

- Architecture recommendation (current and future state)
- 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.



Access Risk Management Lite Setup Services for IdentityNow (PS-SAPIDN-AMR-LITE-PP)

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 (PS-SAPIIQ-ARM-PP)

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
 - Q&A session to be conducted with SailPoint Architect and customer
- Enablement (initial session)
 - Access Analyzer enablement
 - Reporting overview
- Follow-up sessions
 - Up to three (3) enablement sessions as requested by customer
- Integration
 - Install Access Risk Management Integration plugin
 - 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)
 - 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

Quick Starts

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.

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.

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

Lifecycle & Compliance Foundation (PS-LCCFD-STD-BUNDLE)

Lifecycle & Compliance Foundation is an all-in-one package that includes initial setup and basic implementation use cases. It requires a minimum of the Cloud Standard Suite and must be paired with a Gold, Silver or Platinum Customer Success Portfolio Bundle.

Includes:

- Configuration of 1 Authoritative Source and 1 Directory Source
- Configuration of two (2) 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
 - Configuration of one (1) workflow

NERM Quick Start (PS-NERM-QS)

The NERM Quick Start project is focused on getting a customer up and running with a single population of identities and five (5) prescriptive workflows. This will give Customer a solid foundation on which to build their non-employee management strategy. QuickStart is limited to one (1) onboarding flow (data collected, forms, approval) across every non-employee type included in the one (1) population.

QuickStart Includes:

- Setup and configuration of NERM for a single population. Additional populations can be added as part of a separate follow-up project.



- Five (5) Prescriptive workflows included:
 - Onboarding
 - Modify/Update
 - Termination (manual and auto)
 - Rehire
 - End Date Management
- Includes one (1) single-direction integration, one (1) bi-directional integration, and up to five (5) one-time bulk imports of profile data

* *QuickStart does not include configuration within IdentityNow to onboard NERM as an authoritative source.*

This project is estimated to take twelve (12) weeks and includes 250 hours of Professional Services, which are valid for twelve (12) months from the Effective Date.

Expert Services

Expert Services (PS-ES-#HR BLK and PS-IDN-ES #HR BLK)

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.



Identity Security Cloud Advisory Services

Identity Security Cloud Advisory Services offers a monthly subscription purchase of proactive Advisory Services with a designated technical advisor focused on program expansion and a team providing continuous hands-on Implementation assistance.

Identity Security Cloud Advisory Services Lite (PS-IDN-AS-LITE)

This offering comes with a designated team who works with Customer team on implementation, goals, and objectives of Customer's overall identity program. This engagement model is designed to recognize the full potential of SaaS investments with guidance and hands-on assistance. All the limits included in the SKU assume that Customer purchases a standard one (1) year term and will be prorated per the actual term defined in the contract. . The activities may include.

- Designated Account Team
 - Project Manager
 - Technical Advisor
 - Solution Architect / Deployment / Implementation Engineer
- Weekly
 - Strategic Workshops program initiatives, New Product Features, Roadmap, and specialized integrations like EPIC, SAP, CyberArk, ServiceNow, NERM, DAS, etc.
 - Tenant Implementation Analysis: To perform a review of any failed activities, events and/or any other day to day ISC operations and provide recommendations.
- Monthly
 - Tenant Diagnostics: To perform an Implementation Assessment review of any newly onboarded connectors, use cases, and provide SailPoint implementation best practices and recommendations as needed.
 - Application Onboarding/Integration Assistance: Onboard application/source/integration into ISC with SailPoint best practice recommendations
 - Access to Quick Start Templates through SailPoint Services built Front Door Engine for rapid application onboarding.
- Bi-Annually
 - Remediations of critical implementation issues
- Annually
 - Audit Assistance to help provide the right information to the auditors.



- Deep-dive Implementation specific maturity assessment and provide a top-level view of achieved value and redefine priorities if needed.

Identity Security Cloud Advisory Services Premium (PS-IDN AI-AS-PREM)

This offering comes with a designated team who gets into implementation, goals, and objectives of the overall program. This engagement model is designed to recognize the full potential of SaaS investments with expert guidance and hands-on assistance. All the limits included in the SKU assume that Customer purchases a standard one (1) year term and will be prorated per the actual term defined in the contract. The activities may include

- Designated Account Team
 - Project Manager
 - Technical Advisor
 - Solution Architect / Deployment / Implementation Engineer
- Weekly
 - Strategic Workshops program initiatives, New Product Features, Roadmap, and specialized integrations like EPIC, SAP, CyberArk, ServiceNow, NERM, DAS, etc.
 - Tenant Implementation Analysis: To perform a review of any failed activities, events and/or any other day to day ISC operations and provide recommendations.
- Quarterly
 - Tenant Diagnostics: To perform an Implementation Assessment review of any newly onboarded connectors, use cases, and provide SailPoint implementation best practices and recommendations as needed.
 - Application Onboarding/Integration Assistance: Onboard application/source/integration into ISC with SailPoint best practice recommendations
 - Access to Quick Start Templates through SailPoint Services built Front Door Engine for rapid application onboarding.
- Bi-Annually
 - Remediations of critical implementation issues
- Annually
 - Audit Assistance to help provide the right information to the auditors.
 - Deep-dive Implementation specific maturity assessment and provide a top-level view of achieved value and redefine priorities if needed.



Identity Security Cloud Delivery Assurance (PS-DA-IDN-PP-12)

Delivery Assurance is a very light version of our Advisory Services providing our SaaS customers with strategic advice during their Identity Governance modernization. The activities may include.

- Designated Account Team
 - Project Manager
 - Technical Advisor
 - Solution Architect / Deployment / Implementation Engineer
- Weekly
 - Strategic Workshops program initiatives, New Product Features, Roadmap, and specialized integrations like EPIC, SAP, CyberArk, ServiceNow, NERM, DAS, etc.
 - Tenant Implementation Analysis: To perform a review of any failed activities, events and/or any other day to day ISC operations and provide recommendations.
- Monthly
 - Tenant Diagnostics: To perform an Implementation Assessment review of any newly onboarded connectors, use cases, and provide SailPoint implementation best practices and recommendations as needed.
- Bi-Annually
 - Remediations of critical implementation issues
 - Application Onboarding/Integration Assistance: Onboard application/source/integration into ISC with SailPoint best practice recommendations
 - Access to Quick Start Templates through SailPoint Services built Front Door Engine for rapid application onboarding.
- Annually
 - Audit Assistance to help provide the right information to the auditors.

Deep-dive Implementation specific maturity assessment and provide a top-level view of achieved value and redefine priorities if needed.

General Identity Security Cloud Advisory Services Terms & Conditions

- 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, 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.

Professional Services Reviews

IdentityIQ CheckUp (PS-HC-PP)

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 (PS-HC-IDN2-PP)

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.