

# IdentityNow Setup Services

## Introduction

SailPoint offers “Setup Services” to help the customer with a quick start on their IdentityNow implementation journey and help the customer realize the value of the product in the initial few days of purchasing IdentityNow. SailPoint’s Setup Services team, a part of the Professional Services team, staffed with skilled consultants, will work with the customer and/or the partner’s implementation team to provide expert advice for a great start with a solid foundation needed for the implementation.

**Notes:**

- *Setup Services is not a replacement for the effort needed to configure/implement IdentityNow to meet the customer's use cases.*
- *Setup Services is a short engagement with SailPoint Services team to quickly get the infrastructure up and running, get advice on the product features, design choices etc., from a consultant during the first couple of months of procuring IdentityNow.*
- *SailPoint recommends the customer to get through the readiness checklist from the pre-sales phase to be able to start on the Setup Services engagement during the first week of the license close date.*

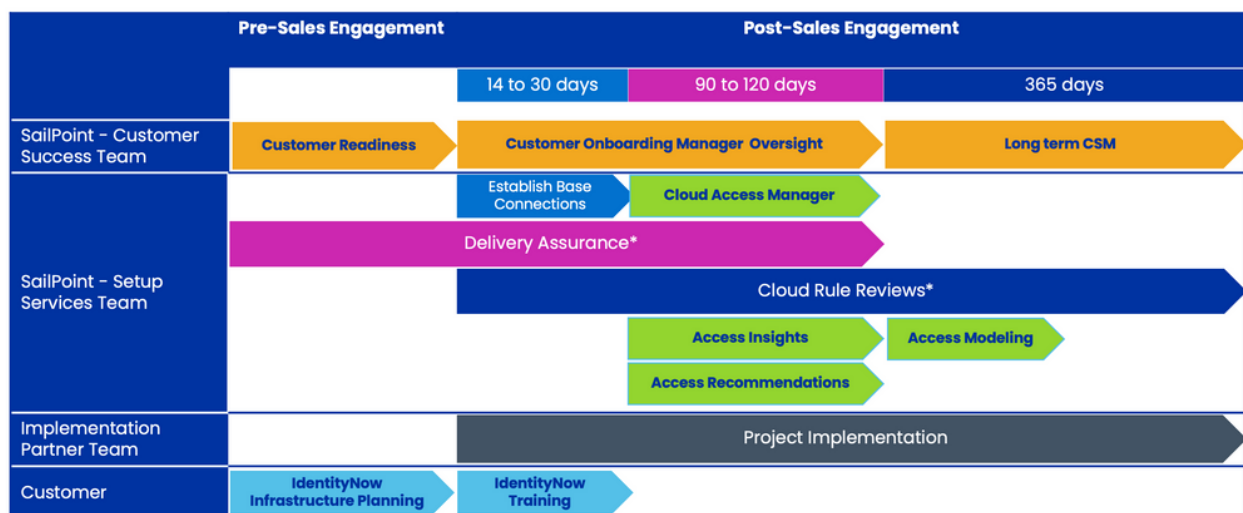
## Offerings

Setup Services comes in various packages, depending on the various SailPoint Product components purchased by the customer. Listed below is a table with most common “Setup Services” offerings, their logical phases during the implementation and the objectives/activities during each phase.

IdentityNow Setup Services	Business Cloud Setup Services	IdentityNow & IdentityAI Setup Services	Business Setup S
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<ul style="list-style-type: none"> <li>Establish Base Connections (EBC)</li> <li>Delivery Assurance (DA)</li> <li>Cloud Rules Review</li> </ul>	<ul style="list-style-type: none"> <li>Establish Base Connections (EBC)</li> <li>Delivery Assurance (DA)</li> <li>Cloud Rules Review</li> <li>Access Insights Setup</li> <li>Access Recommendations Setup</li> </ul>	<ul style="list-style-type: none"> <li>Establish Base Connections (EBC)</li> <li>Delivery Assurance (DA)</li> <li>Cloud Rules Review</li> <li>Access Insights Setup</li> <li>Access Recommendations Setup</li> <li>Access Modeling Setup</li> </ul>	<ul style="list-style-type: none"> <li>Establish Base Connections (EBC)</li> <li>Delivery Assurance (DA)</li> <li>Cloud Rules Review</li> <li>Access Insights Setup</li> <li>Access Recommendations Setup</li> <li>Access Modeling Setup</li> </ul>
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## Timeline



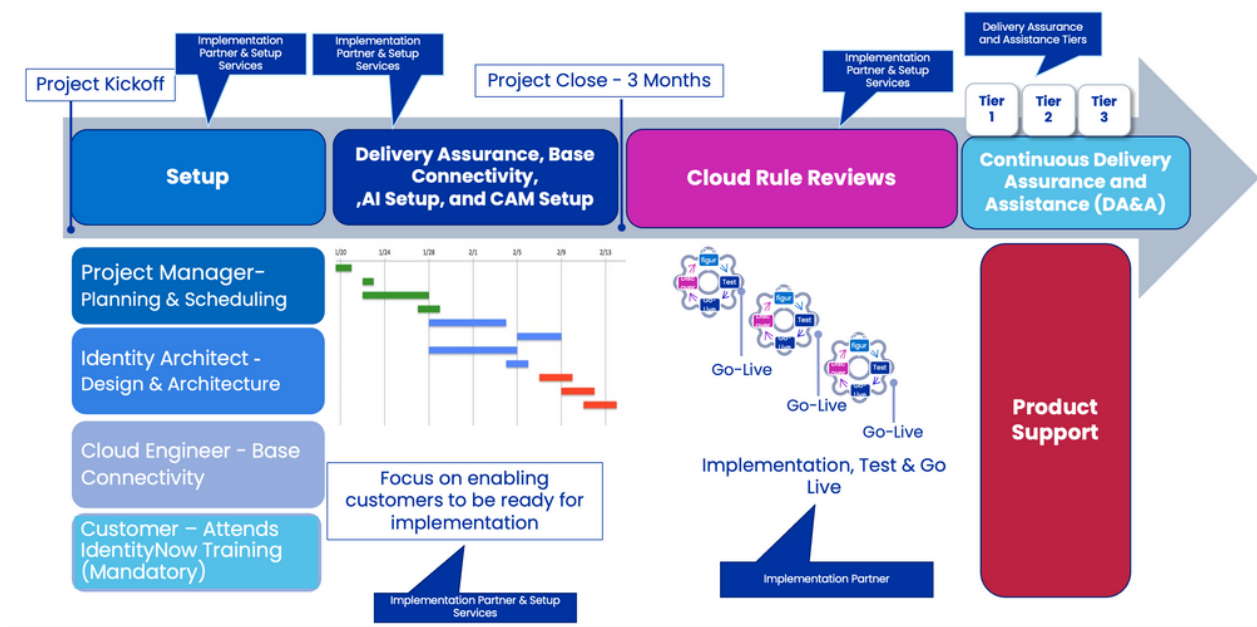
- 10 hours of time is reserved for Rules Review. Additional hours need to be purchased after this allocation.
- Delivery Assurance is limited to 3 to 4 months of engagement ( up to an hour call weekly). Additional DA time is needed to support the entire implementation

### Note:

- Please refer to the offerings section to verify the components included as part of the IdentityNow purchase agreement.

## Engagement Model

All Setup Services engagements will have a designated Project Manager to track the progress of the Setup Services engagement, a Solution Architect to provide Delivery Assurance and a Deployment Engineer to perform activities outlined in "Establish Base Connections". Here is our typical Setup Services engagement model. SailPoint Professional Services team offers "Delivery Assurance & Assistance" for a continued engagement as an extension to Setup Services. Please reach out to your Setup Services Engagement Manager or Customer Success Manager for additional details on "Delivery Assurance & Assistance" model and tiers pricing.



## Establish Base Connections (EBC)

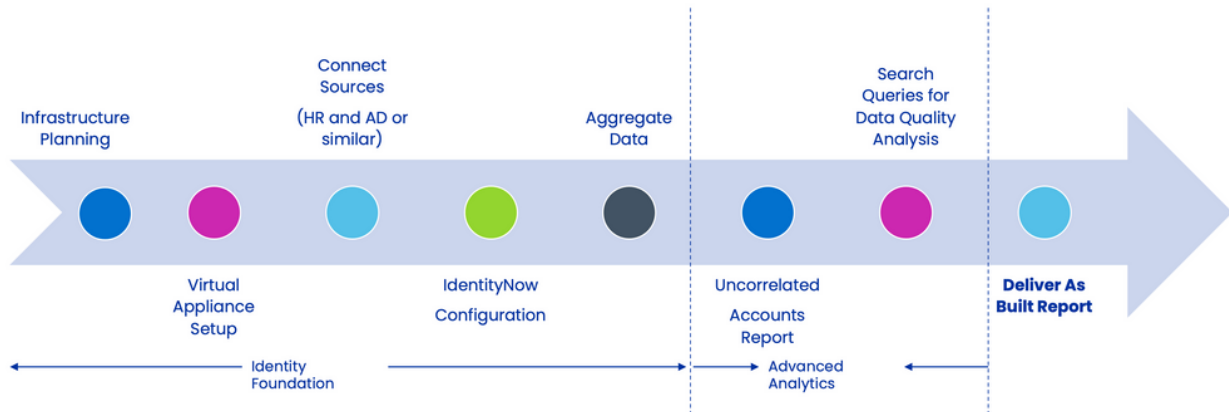
IdentityNow requires a Virtual Appliance in the customer's network perimeter, to communicate with any applications /sources. Similarly, an IQService component is needed for any write operations in Active Directory. Listed are the objectives achieved as part of EBC

- Configure One Virtual Appliance Cluster in Sandbox & Production
- Configure One Virtual Appliance in Sandbox & Production
- Configure One IQService in Sandbox & Production
- Validate the Virtual Appliance Configuration
  - Test connectivity with two sources ( A HR Source and a Directory Source)
  - Configure Attribute based Correlation
  - Initial data aggregation
  - Provide Uncorrelated Accounts Report
- Identity Profile
  - Up-to 10 identity attributes with one-one mapping or leveraging basic out of the box transforms
- Branding (Optional)
- SSO configuration (Optional)

- Provide As-Built/As-Configured Document
- Help with few search queries for any data clean up activities
  - Employees without Managers
  - Inactive Employees with Active Accounts etc.,
- Migrate the Identity Profile, transforms, Source configurations into the Production tenant

### Note:

- No use cases are implemented as part of EBC



## Delivery Assurance

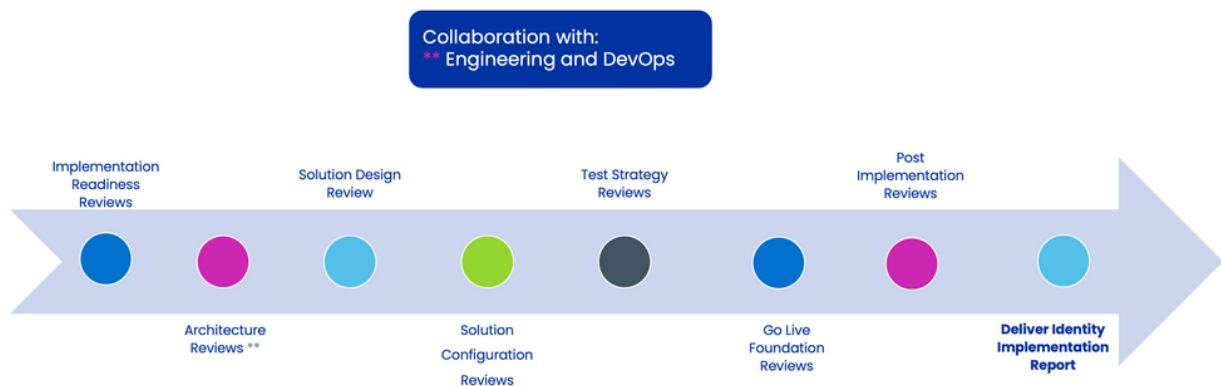
IdentityNow gets new features, updates on a regular basis and it's critical to have information on these new features, roadmap during the architecture and design phases of the engagement. The implementation team can proactively get advice from the SailPoint team by brainstorming use cases, requirements to make right architecture & design choices for the implementation. A weekly hour long recurring meeting for three months will be scheduled with a SailPoint Solution Architect to achieve these objectives

- Infrastructure Planning
  - Virtual Appliances, IQService, Connector Gateway
  - High Availability & Disaster Recovery
- Get a head start with the project deliverables by leveraging SailPoint templates
  - Requirements & Solution Design
  - Test Cases Document
  - Issues & Design Decisions tracker
  - Go-live planning document
- Review of the project documents provided by the implementation team and provide feedback on
  - Requirements & Solution Design
  - Test Cases Document

- Go-live planning document
  - Soft go-live
- Talk about existing and new SaaS features
- Brainstorm ideas in the technical sessions on use cases and identify a potential path forward
- Provide a "Delivery Assurance" report with any recommendations / feedback on the topics discussed during these scheduled sessions

### Note:

- *Delivery Assurance is not equivalent to training. A trained and certified resource from the implementation team is expected on these technical calls for efficiency.*
- *The assigned SailPoint Solution Architect will not capture requirements, design or any other documents as part of Delivery Assurance. The implementation team is responsible for the documents with advisory from the SailPoint team.*
- *The assigned SailPoint Solution Architect will not debug any configuration issues and is not responsible for fixing any code defects or configuration errors.*



## Cloud Rules Review

IdentityNow is a multi-tenant SaaS offering. IdentityNow allows execution of rules for complex cases and some of the rule types execute on the IdentityNow tenant. Additional care must be taken while deploying rules into the tenant and the customers need assistance from the SailPoint team for validating and deploying such rules. As part of the Setup Services agreement, 10 hours are reserved and dedicated for rules review process.

### Note:

- *SailPoint Services team will not develop / modify any business logic*
- *SailPoint recommends implementers follow our rule guide while developing rules*
- *SailPoint recommends implementers go through the rule validator for minimizing the number of iterations needed to deploy the rules*

- *The primary objective is to validate the rule with our best practices and provide any validation errors to the submitter*
- *The implementation team should take the rule validation and deployment time into account while planning activities. There may be multiple iterations needed for the validation and deployment of the rules. Typically, SailPoint tries to respond and deploy rules within 24 hours for the rules submitted for review during weekdays and on the next working day for rules submitted for reviews on the weekends.*
- *The 24 hours should be calculated from the last update (based on the feedback provided by SailPoint), not based on the initial rule submission.*

## Access Insights Setup

Access Insights as part the SailPoint's IdentityAI offering, can only be configured by the SailPoint team. The following activities are performed as part of the setup

- Configure Authentication from Identity Provider of choice
- Full Health and Data Quality Check
- Analysis and Configuration of Attribute Mappings
- Monitor and Validation of Collection Health
- Dashboard and Chart Creation (Up to 2 Dashboards with 5 Charts each)
- Usage Training & Testing Support

## Access Recommendations Setup

Access Recommendations as part the SailPoint's IdentityAI offering, can only be configured by the SailPoint team. The following activities are performed as part of the setup

- Analysis and Configuration of Recommendation Engine
- Workshops: access certification and access request recommendations
- Usage Training & Testing Support

## Access Modeling Setup

Access Modeling as part the SailPoint's IdentityAI offering, can only be configured by the SailPoint team. The following activities are performed as part of the setup

- Analysis and Configuration of Access Modeling
- Access Modeling Workshops: Access scoping; Suggested roles; role analysis; and peer group analysis
- Usage Training & Testing Support

## Cloud Access Management Setup

- Configure Cloud Service Provider accounts.
- Review CAM data, reports and dashboards.

- Review OOTB guardrails and define custom guardrails.
- Transition in love session with knowledge transfer and introduction to Support.
- Consult on product functionalities and limitations, brainstorm ideas in technical sessions on use cases and suggested path(s) forward.

**Note:**

- *CAM Setup concludes by SailPoint providing a CAM As-Built report documenting conversations, guidance provided, rationale for configuration decisions (aka CMDB)*
- *Customer will receive one CAM tenant, and no CAM sandbox are available.*

## FAQ

### 1. Is Setup Services enough for our implementation?

**Ans:** No, Setup Services helps with the basic foundations and provides guidance on the best practices, help understanding the product features, brainstorm use cases with SailPoint Architect during the architecture and design phases. Implementation of any use cases is out of scope for Setup Services. Additional time either through SailPoint or an implementation partner are needed for the full implementation.

### 2. Is Setup Set Hours Driven or Delivery Driven?

**Ans:** Setup Services is **not an implementation service** and it is designed to assist our customers/partners where SailPoint ensures best practices are followed during the implementation. This helps to keep customer implementation simple and overtime less expensive to manage. It provides delivery assistance on basic sources connectivity and rule reviews. It's a delivery driven model and not hours.

### 3. How many rule reviews are included?

**Ans:** SailPoint reserves 10 hours of time for rule reviews. These 10 hours should be used within a year of the license close date, or these hours will expire. Additional hours might be necessary during the implementation.

### 4. Do we have anything for continuous support after Setup Services engagement?

**Ans:** Yes, We offer paid **Delivery Assurance and Assistance Engagement** under **Tier models**. This service is designed to be augmented with partner implementation team. Please contact your Account Executive or Customer Success Manager for more information.

### 5. Why do we need Setup Services if SailPoint is doing the implementation ?

**Ans:** In a majority of cases, there is high probability that customers are shopping for an implementation partner and SailPoint can be one among them and the implementation contract might not get signed with the license closure. Keeping time to value as a priority, the initial foundational aspects have been separated out from the overall implementation. The same delivery standards applicable to any of our delivery partners are also enforced on SailPoint implemented projects with this model.

## 6. Can you show the differences between the tasks SailPoint does during Setup Services vs tasks performed by the implementation team ( Partner, SailPoint or Customer)

Setup Services Tasks	Implementation Team Tasks (Partner, SailPoint or Customer)
<ul style="list-style-type: none"> <li>• Break-glass accounts and tenant naming validation</li> <li>• Virtual Appliance Setup</li> <li>• Virtual Appliance Connectivity               <ul style="list-style-type: none"> <li>• HR (Quantity: 1)                   <ul style="list-style-type: none"> <li>• Test Source Connectivity</li> <li>• Basic schema &amp; Identity Profile</li> <li>• Aggregation of accounts with basic profile</li> </ul> </li> <li>• Active Directory (Quantity: 1)                   <ul style="list-style-type: none"> <li>• Test Source and IQService Connectivity</li> <li>• Basic schema and correlation</li> <li>• Aggregation of basic accounts</li> </ul> </li> </ul> </li> <li>• Branding</li> <li>• SSO Configuration</li> <li>• Searches on HR and Active Directory</li> <li>• AI Setup</li> <li>• CAM Setup</li> </ul>	<ul style="list-style-type: none"> <li>• HR               <ul style="list-style-type: none"> <li>• Advanced schema &amp; Identity Profile w/ transforms and rules</li> <li>• Write Back to HR (if applicable)</li> <li>• Aggregation of accounts with complete profile</li> <li>• On boarding, Off boarding and Re-hire configurations</li> </ul> </li> <li>• Active Directory               <ul style="list-style-type: none"> <li>• Advanced schema and correlation</li> <li>• Aggregation of ALL accounts and entitlements</li> <li>• Correlation Rules on Active Directory</li> <li>• Attribute Sync (if applicable)</li> <li>• Provisioning (if applicable)</li> <li>• Lifecycle Events (if applicable)</li> <li>• Password Management (if applicable)</li> <li>• Certification (if applicable)</li> </ul> </li> <li>• Additional sources or use cases listed in the SOW</li> </ul>

DA

Delivery Assurance EBC Foundations Setup Services Setup Services Lite

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