

Identity Manager on Demand Silver package

IMOD accelerated deployment service offering description.

ABC-VOL-FF

Provides a scalable operational baseline for business readiness in a short time.

Overview

The Identity Manager on Demand (IMOD) Silver package builds on the Bronze foundation to extend automation into user self-service and identity governance.

Through this package, One Identity Professional Services configures a predefined set of out-of-the-box capabilities to enable employee and manager self-service, access requests via the IT Shop portal, and scheduled attestation reviews of accounts and entitlements.

The packaged PSO service leverages One Identity's proven methodology (D5), focusing on efficiency, standardization, and predictable delivery outcomes.

Silver is delivered as an incremental enablement layer on top of the existing Bronze configuration, preserving prior investment and providing a seamless upgrade path to Gold as governance and compliance requirements expand.

Service delivery is executed remotely and follows a phased approach (D5) aligned to Discovery, Design, Develop, Deploy, and Deliver stages, emphasizing short time-to-value.

Objectives

- **Extend Bronze automation:** Add user self-service, access request processing, and baseline governance capabilities without custom development.
- **Accelerated time-to-value:** Deliver a usable IT Shop portal experience and governance workflow quickly through a packaged, repeatable scope.
- **Employee and manager self-service:** Enable workforce self-maintenance of selected attributes to reduce IT ticket volume and improve data quality.
- **Standardized access requests:** Publish requestable items for additional access to applications and entitlements configured under Bronze.
- **Governance through attestations:** Establish scheduled attestation campaigns to review accounts and entitlements and remove unneeded access.
- **Policy driven approvals:** Configure approval policies and workflow rules for access requests and attestations aligned to customer-defined rules.
- **Low risk, out-of-the-box delivery:** Use standard IMOD capabilities and configuration only, minimizing delivery risk and simplifying maintenance.
- **Incremental adoption path:** Implement Silver as an additive layer, preserving Bronze configuration and simplifying future upgrades to Gold.
- **Operational readiness:** Provide a configured Dev/Test baseline for validation of Silver features prior to any Production promotion.
- **Clear scope boundaries:** Services are limited to the IMOD Development/Test environment; UAT remediation and Production migration are available under Silver Plus.
- **Audit and compliance alignment:** Improve access governance readiness through structured reviews and approvals for access changes.

Scope and Deliverables

The implementation follows a phased delivery approach and includes the essential activities required to extend IMOD with self-service, access requests, and identity governance capabilities on top of the existing Bronze configuration.

Package entitlements (e.g., number of attestation campaigns, requestable items, and workflows) are limited to the quantitative thresholds defined in the Package Scope Table below:

Package Scope Table:

Category	Deliverable / Item	Silver Plus Package (IMOD – One Identity Manager)
Portal	IMOD Dev/Test Environment	Development/Test only: configure Silver capabilities in the existing IMOD Dev/Test environment built under Bronze.
	IT Shop Web Portal Access	Enable access to the IT Shop web portal services used for self-service and access requests.
	Customer Branding	Apply customer logo, company title, and color theme to the IT Shop portal.
User Self Service	Self-Service Attribute Management	Configure employee and manager self-service for selected attributes (e.g., phone numbers, preferred name, job title) based on customer-defined rules.
Identity Governance	Service Catalogs	Create service catalogs and categories to organize requestable items for the applications and entitlements managed under Bronze.
	Requestable Items	Configure requestable items to request additional access (e.g., groups, licenses, or other entitlements) for applications integrated under Bronze.
	Attestation Campaigns	Up to three (3) attestation campaigns for scheduled review and recertification of accounts and entitlements.
Policies & Workflows	Approval Policies and Workflow Rules	Configure approval policies and workflow rules for access requests and attestation campaigns aligned to customer-defined approval paths.
Reports	Dashboard & Reports	Deliver all the out-of-the-box reports and Dashboard into the customer’s environments (Dev/Test & Production).
Scope Limits & Dependencies	Quantitative Limit	Three (3) use-cases configured during the Silver package implementation in IT Shop; Three (3) Attestation campaigns; One (1) UAT Cycle support of 40 hours; Execute one (1) promotion to production process; Provide post-production assistance up to sixteen (16) consecutive business hours Four (4) consecutive business hours of knowledge transfer in OIM administration.
	Key Dependency	The customer is responsible for providing the logotypes, color pallets and etc. to the Web portal configuration (branding).
	Key Dependency	The Customer is responsible for creating the Test Plan to guide and execute the User Acceptance Testing (UAT). It must be ready by the end of the Development phase.

These limits apply across all project phases and represent the maximum number of configuration items included in the IMOD Silver Package. Any work beyond these limits requires mutual agreement and will be managed through formal change control.

Phase completion and change control are governed by the provisions defined in the General Terms section at the end of this Service Description.

1. Phase – Discovery

The Discovery Phase establishes the foundation for the Silver implementation by validating objectives, confirming in-scope self-service and governance requirements, and preparing the Dev/Test environment for configuration activities.

Activities

- Conduct the project kickoff meeting.
- Facilitate Silver discovery workshops with business and technical stakeholders to confirm portal, self-service, request, and attestation requirements.
- Review the existing Bronze configuration to confirm readiness and identify any prerequisite adjustments within the packaged scope.
- Document in-scope Silver configuration requirements using One Identity standard templates and update the project plan.

Deliverables

- Silver discovery workshop(s) and requirements capture.
- Updated Project Plan based on the discovery outcomes.
- Confirmed list of in-scope self-service attributes, requestable items, approval rules, and attestation campaign definitions.
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2. Phase - Design

The Design Phase translates the confirmed Silver requirements into a Silver Use Cases and Requirements Document (addendum to Bronze), defining how the IT Shop, self-service, approvals, and attestations will be implemented within the agreed scope.

Activities

- Create the Silver Use Cases and Requirements Document covering the in-scope portal, self-service, access request, and attestation capabilities.
- Conduct the Use Case Review Workshop.
- Update the document based on workshop outcomes.
- Submit the document to the customer for review and approval.
- Incorporate customer feedback and finalize the document.
- Accept the Silver Use Cases and Requirements Document (Customer).

Deliverables

- Silver Use Cases and Requirements document (addendum).

3. Phase – Development

The Develop Phase configures the Silver capabilities in the IMOD DEV/TEST environment based on the approved Silver Use Cases and Requirements Document.

Activities

- Confirm DEV/TEST environment readiness and connectivity to the IMOD tenant and portal.
- Enable access to the IT Shop web portal services.
- Apply customer branding (logo, company title, and colors) to the portal.
- Configure employee and manager self-service for selected attributes.
- Create service catalogs and configure requestable items for additional access to in-scope applications and entitlements managed under Bronze.
- Configure up to three (3) attestation campaigns for accounts and entitlements, including reviewers and schedules.
- Configure approval policies and workflow rules for access requests and attestation campaigns.
- Validate request-to-provisioning execution for a representative set of requestable items within the packaged scope.
- Perform unit testing to confirm the configuration aligns with the approved Silver Use Cases and Requirements document.

Deliverables

- IMOD Dev/Test environment is configured with the in-scope Silver capabilities.
- Silver features are implemented in accordance with the approved Silver Use Cases and Requirements document.
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4. Phase – Deployment

The Deployment phase supports customer validation of the package configuration in the DEV/TEST environment and formal UAT remediation.

Activities

- Execute customer-led validation of the Silver capabilities in DEV/TEST. (Customer)
- Provide clarification and guidance on in-scope configuration during customer validation.
- Document agreed outcomes and obtain completion acknowledgement for the Silver Base scope.

Deliverables

- Package features configured according to the Requirements and Use-case documents and attestation campaigns ready for the UAT in IMOD DEV/TEST environment.
- Support the customer UAT by providing clarification and adjusting any item not in compliance with the Use-case and requirements document.
- Formal customer acceptance.
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5. Phase – Delivery

The Deployment phase validates that the configured solution aligns with the approved Use Case and Requirements document by supporting the customer User Acceptance Testing (UAT) and remediating any items that are not compliant with the document.

Activities

- Check the PRODUCTION environment readiness and set up the environment.
- Prepare and move the Transport files from DEV/TEST to the PRODUCTION environment.
- Configure the Production environment and realize the Synchronization (HR and Target systems)
- Execute the **Go-live**.
- Provide postproduction support to the customer (up to 2 days).
- Execute the administrative knowledge transfer Workshop (up to 4 hours).
- Provide final project acceptance (customer).

Deliverables

- Production environment configured and with the development approved in UAT installed.
- Support the post go-live operation (up to 2 days).
- Administration workshop (up to 4 hours).

Key Benefits

- Extend the Bronze foundation with self-service and access request experience through the IT Shop portal.
- Reduce manual ticket volume by enabling employees and managers to maintain selected identity attributes.
- Standardize access request and approval workflows to support consistent entitlement provisioning across Bronze-managed systems.
- Introduce governance practices with scheduled attestations to identify and remove unneeded access.
- Preserve a clear upgrade path from Silver to Gold to expand governance controls, risk evaluation, and additional application coverage.

Prerequisites and Assumptions

The Customer will agree to cooperate with One Identity in the performance of the Services and to meet the following prerequisites and responsibilities.

1. General Terms

- A prerequisites checklist will be provided prior to service commencement; Customer must confirm prerequisites are met prior to the start of the engagement.
- The Customer will designate a single point of contact to coordinate activities and ensure timely completion of required tasks.
- The Customer will provide appropriate technical resource(s) as needed to support One Identity in completing the activities and deliverables described above.
- Services will be delivered remotely during standard business hours (8:00 a.m.-5:00 p.m., Customer local time), Monday through Friday, excluding holidays. Unless otherwise agreed in writing, the Services are governed by the terms of the Transaction Services Agreement (TSA) available at <https://www.oneidentity.com/legal/service-agreements.aspx> as in effect on the date the Customer orders this Service Description. Capitalized terms not defined herein have the meanings set forth in the TSA.

2. Delivery Scope, Phases, and Quantitative limits

- This Service Description defines the scope, phases, and deliverables for the Services, including quantitative limits (e.g., “up to n”).
- Each phase is deemed complete upon Customer acceptance of the deliverables specified for that phase.
- All activities are delivered remotely by design.
- The Customer will validate the Silver configuration in the DEV/TEST environment using customer-defined test scenarios and confirm completion of the packaged scope.
- A cloud-hosted deployment architecture is assumed to be in place as part of the underlying IMOD (Bronze) service foundation.

3. Design interactions, validation cycles, reviews, runbook.

- Per package design, one (1) design iteration is included in scope. Additional cycles and remediation are not included in the Silver Plus package and require a Request for Change (additional effort/costs).
- The UAT cycle is planned to be completed within five (5) consecutive business days. The Customer must confirm that this timeline is feasible. If additional time is required, UAT is on the project’s critical path; therefore, each additional business day will extend the overall project end date by the same amount and must be mutually agreed between Customer and One Identity.
- The **customer business processes** (such as use-cases and business requirements) within the scope of this project to be implemented in the solution must be already defined and established within the company.
- The One Identity team requires **direct remote access** to the DEV/TEST environment (e.g., via VPN or equivalent) to ensure timely project progress.
- Reviews of the system landscape, user volumes, and connectivity are based solely on information provided by the Customer during Discovery and exclude modeling of future growth or seasonal/peak scenarios.
- Runbook content is limited to core administrative procedures and excludes detailed standard operating procedures (SOPs), training materials, and custom operations manuals.

If any prerequisite or assumption underlying this package is materially inaccurate, or if the Customer does not meet these requirements, continuation of the engagement will require mutual agreement on revised scope, timeline, and/or fees.

4. Out-of-Scope Items

- Configuration of use cases or functionality outside of the use cases, functionality, or limits described in this Service Description.
- Customizations (including development of scripting or coding that alters the base out-of-the-box functionality offered by One Identity Manager).
- Changes to administrative or user interfaces beyond standard configuration and branding capabilities described above.
- Business process design/definition (all in-scope processes must be defined prior to the start of the Discovery phase).
- Design, execution, or analysis of stress, load, or performance testing.
- Development of a UAT Test Plan and execution management (Customer responsibility).
- Direct execution of tasks in the Production environment; Production activities will be performed by the Customer under One Identity supervision/guidance, as applicable.

- Implementation-related training and formal knowledge transfer beyond the agreed deliverables (e.g., training materials or structured enablement sessions).
 - During the Package implementation, any customer or third-party-developed new functionality or changes introduced after the Bronze Package go-live that impact the package scope, timeline, or configuration will be treated as out of scope and handled as additional, separately scoped work.
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ABC-VOL-FF	ONE IDENTITY MANAGER ON DEMAND SILVER PLUS IMPLEMENTATION	Fixed Fee
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