Software Asset Management (SAM) Services Scope

Vendor will provide SAM Managed Services, defined as per the scope. Vendor will be responsible for software license compliance reporting for all publishers. Vendor will also be responsible for developing and implementing best practices for processes and for end to end implementation and maintenance of SAM Process. Vendor needs to bring in additional tools for SAM. Also, the scope includes all On-premises (Data Center) and All Cloud Deployments for SBI Life.

Section A: Asset Count

Asset Type	Count *
End Points	15,000 +
Server –	1400 +

 * Year on Year growth of 10%

Section B: Scope of Work

The scope of work for SAM Managed Services has been divided into following sections:

Software License Procurement

1. Vendor will assist SBI Life in gathering Software Procurement records for the major publishers like Microsoft, oracle, IBM, VM Ware, Broadcomm (Symantec), Trend Micro,HCL,Microfocus,Adobe etc, this list is just indicative and all other publishers available in our environment (On severs and end points) on half yearly basis from various sources and will analyze OEM portal extract, contracts, PO copies, Invoices and any other documents.

2. Vendor will conduct detailed contract analysis including identifying license metric, version, edition, model for all products the major publishers based on the agreements, contracts, invoices any other proof of purchase provided or from their own metholodigy.

3. Vendor shall inform SBI Life on discrepancies identified in entitlements and post discussion, reconcile the entitlement, finalize the license count along with license metric, version,edition, model number, serial number / product key, upgrade / downgrade path, AMC renewal date, Parent / Child contract, terms of usage and EULA, Cost, software metering details and create a digitized inventory.

4. Vendor will be responsible to keep the repository/catalogue updated and should create a dashboard. The dashboard for the repository should contain descriptive and visual representation (graphs) of license entitlements based on different criteria, including but not limited to publisher, cost, license metric, serial no., product keys, upgrade/downgrade path,

legacy contract details and AMC renewal date. There should be the ability to download custom reports based on requirements.

5. Vendor should adhere to acceptable license metric for any future license / AMC procurement based on actual usage at SBI Life and best practices as per OEM/Publisher compliance. Vendor should also consider future road map of the OEM while providing their recommendations and help SBI Life to construct the Enterprise Agreement or optimize the BOM during EA renewals based on future requirement and current usage. The direct measurement for this will be cost savings for SBI Life.

6. Vendor should assist SBI Life in formulation of freeware (including Open-Source Software) usage and compliance strategy

7. Vendor should assist SBI Life in configuration of SAM module in BMC ITAM or any other tool procured by SBI Life

8. Vendor should also bring their own tool to compliment to SBI Life's tool to ensure that all the Software installed in SBI Life environment are discovered, identified and reported for SAM compliance. Discovery of software should not be limited to scan through registry , exe or install program file but should able do discover all type of software which can result into licensing liability

9. Any tool being used by the vendor should mandatorily undergo security testing at SBI Life end OR it should be a product certified for security by CERT-IN empaneled vendor. All such deployments should be provided as Software As Service as part of this engagement and will have to be on premises in SBIL and not on cloud and should govern through service provider license.

Software License Compliance Reporting

1. Vendor to prepare software license compliance report (gap analysis between software deployment and entitlements) every 6 months for all the major publishers.

2. Vendor to prepare the software license compliance report for all softwares discovered in SBI Life environment as per the SBI Life approved software and others (freewares, Opensource and paid softwares)

3. Minimum coverage of 95% of end user devices and 100% of Servers on all On-premises as well as cloud platforms including but not limited to Windows, Linux, ESXI, Hyper-V for collection of software inventory and other relevant details required for license compliance.

4. Vendor to present the list of High, Medium and Low Risk Publishers based on cost exposure, compliance risk and any other factor based on best practices. Vendor to prepare & periodically update white list software as part of the SAM process. Vendor to update software catalogue/repository with any new findings from the above compliance summary.

5. Review existing ELA/ULA agreements of the SBI Life – with publishers like Oracle, Microsoft, Vmware,IBM etc. and provide us specific pointers, guidelines, suggest updates in terms of contractual clauses and/or interpretations which will benefit us today or in future or avoid any known pitfalls. Vendor to support SBI Life from licensing perspective in case of any merger or divestment.

6. Oracle Deployment Self Certification: Guide SBI Life on this process, its aspects and detect/collate all needful data in the format as would be required by Oracle. For Oracle database related licensable Features or Options to be in-use, Vendor will provide details of what activity/event/command etc led to that particular Feature/Option to be detected as 'in-use', if possible?

7. IBM License Metric Tool – Vendor to Install, Manage and Maintain ILMT Tool as required for sub-capacity licensing benefit for IBM software. Vendor to perform regular health checks and help SBI Life in maintaining quarterly reporting as required by IBM.

8. Vendor to perform current state assessment and gap analysis of the existing SAM process at SBI Life based on ISO standard. Based on this study, Vendor to develop new SAM process for SBI LIFE. Vendor will be responsible to get the process implemented and define control matrix.

9. Vendor to perform quarterly checks to confirm if the SAM process is being followed, if it requires any changes / updates.

Remediation and Optimization

1. Post compliance check of all publishers, the detailed methodology for proper removal of non complied software, and tools / scripts required to remove such software centrally and manually (in case of inaccessibility or network issues), should be provided by Vendor to SBI Life to facilitate positive confirmation on removal.

2. Vendor to provide recommendation for commercial usage of Freeware and Open-source software

3. After an agreed duration of time, the compliance status to be rechecked for the software, if the files / over licensed applications have been removed properly, needs to be verified by Vendor.

4. Vendor to create cost optimisation plan for the top 10 publishers including contracts, licenses, AMC and cloud migration.

Audit Defence & Training

1. In case of Audit Requests, irrespective of the Publisher, Vendor to conduct an internal assessment and provide SBI Life with the detailed report and remediation methods to reduce non-compliance (if any). Remediation methods will include scripts / tools to remove any unwanted software installation and files from the system. The Pre-check should be at the same level of scrutiny as any third-party software audit

2. Vendor will assist SBI Life in understanding the Audit report presented, comparing it with data collected during the audit and provide a roadmap for draft report discussion with the Auditor/ OEM

3. Vendor should assist SBI Life in facing the OEM/Publisher in the event of observation of unauthorized or misinterpretation of licensing usages. In such situation vendor should help SBI Life to reach amicable solution.

4. Training to be provided to SBI Life team periodically on licensing and SAM process

--End of the Scope document --