

SAM INTELLIGENCE SERVICE

SERVICE DESCRIPTION SD066



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CONTENTS

1. SERVICE OVERVIEW	4
1.1 SERVICE SUMMARY	4
1.2 SERVICE FEATURE TABLE	6
2. SERVICE ACCEPTANCE AND ONBOARDING	8
3. SERVICE BILLING AND CONTRACT TERM	9
3.1 SERVICE BILLING AND INVOICING	9
3.2 CONTRACT TERM AND SERVICE RENEWAL	9
3.3 DATA RETENTION	9
3.4 LICENCE MANAGEMENT	10
4. TERMS AND CONDITIONS	11
4.1 OVERVIEW OF TERMS AND CONDITIONS	11
4.2 DATA PROCESSING AGREEMENT	11
4.3 ISO STANDARDS	11

1. SERVICE OVERVIEW

All bold and capitalised terms used throughout this Service Description are described in the [Glossary and definition of terms](#)

1.1 SERVICE SUMMARY

The Software Asset Management ("SAM") Service gives Customers visibility of their Software and hardware assets, licence compliance, and renewals status. The Service combines analyst reporting and consultancy services, enabling Customers to make informed decisions to optimise their SAM practices. The Service is available in two (2) tiers: Essentials and Intelligence. The respective features of each tier are defined in this Service Description.

The Services include as standard:

- 24x7x365 access to log Support Cases. (**"Softcat Support"**)
- SAM in conjunction with reporting and consultancy services to enable Customers to efficiently manage their software assets, maintain compliance and highlight cost savings where possible. (**"Software Management"**)
- Full review of physical and virtual deployment of software for the defined vendors, with a review of the current position at Service start, and yearly reviews thereafter. (**"Effective Licence Position"**)
- Regular reporting and identification of potential cost saving where applicable. (**"Reporting and Analysis"**)
- A point of contact and escalation. (**"Service Delivery Associate"**)

Technology Partners: As part of the Service, Softcat is proud to partner with two technology providers to offer Customers a versatile choice:

- [Snow Service Option](#)
- [Xensam Service Option](#)

The Service features vary depending on the technology provider. For a detailed breakdown of what is included with each technology, refer to the corresponding Service Option document.

Optional Add-Ons are chargeable extras and, where required, will be quoted, and confirmed on the Work Order.

- Providing a named Service Delivery Manager, service reviews and service reporting. (**"Service Delivery Manager" (Optional Add-On)**)

Together, the above comprise the "SAM Intelligence Service" referred to as the "Service" within this document.

The initial launch of this Service is governed under Softcat's Early Availability (EA) Terms and conditions; however, it is advised that the Customer conducts a thorough review of Softcat's comprehensive Terms and Conditions (T&Cs) as the Service will seamlessly transition from EA to General Availability (GA).

Upon transition to GA, the Customer will automatically be governed by the Standard Terms and Conditions. Concerns or queries regarding the Standard T&Cs should be addressed during the Early Availability phase to ensure clarity and mutual understanding.

The Service is delivered in accordance with the following ISO standards:

- ISO 20000
- ISO 27001
- ISO 9001
- ISO 22301

Unless otherwise stated in the Work Order and in addition to any terms set out in this Service Description, the following applies to the delivery of the Service.

- Softcat Early Availability Terms and Conditions: Early Availability T&Cs
- Softcat Terms and Conditions: T&Cs
- The Data Processing Agreement: DPA

1.2 SERVICE FEATURE TABLE

	Snow		Xensam	
	Essentials	Intelligence	Essentials	Intelligence
Softcat Support				
Log Cases 24x7x365 ¹	✓	✓	✓	✓
Online Support portal to track and log calls	✓	✓	✓	✓
Up to ten (10) Customer Contacts	✓	✓	✓	✓
P1 response Service Level	✓	✓	✓	✓
Software Management				
Entry of purchased software licence entitlement in SAM Software monthly	✓	✓	✓	✓
Configuration of existing and purchased licensing entitlement in SAM Software monthly for strategic vendors		✓		✓
Access to SAM Intelligence team for general licence queries, report requests, Software portal navigation	✓	✓	✓	✓
Entitlement tracking	✓	✓	✓	✓
Renewal notifications	✓	✓	✓	✓
Interface for accessing the product and reporting features	✓	✓	✓	✓
Effective Licence Position				
Provision of annual ELP for agreed Tier One (1) vendors	Optional ²	✓	Optional ²	✓
Six (6) monthly ELP for agreed Tier One (1) vendors	Optional ²	Optional ²	Optional ²	Optional ²
Reporting and Analysis				
Monthly Service briefing call	✓		✓	
Monthly optimisation and reporting workshop		✓		✓
Monthly SAM Essentials or SAM Intelligence Service report	✓	✓	✓	✓
Software as a Service (SaaS) usage reporting (included in the monthly report)				✓
SaaS insights monthly reporting		Optional ²		
Service Delivery Associate				

	Snow		Xensam	
	Essentials	Intelligence	Essentials	Intelligence
Contact and escalation	✓	✓	✓	✓
Service Delivery Manager (Optional Add-On) ²				
Named Service Delivery Manager	✓	✓	✓	✓
Service reports and reviews	✓	✓	✓	✓

¹ Requests are acted upon within contracted coverage hours, as confirmed in the Work Order.

² "Optional" and "Optional Add-On" means a chargeable extra. Where optional extras and/or Optional Add-Ons are chosen by a Customer, this is confirmed on the Work Order.

2. SERVICE ACCEPTANCE AND ONBOARDING

Following receipt of a Customer purchase order, Softcat will confirm the Contract by sending a Work Order, which is usually undertaken online via DocuSign.

Following the acceptance of the Contract, the Onboarding Period will begin. This is the period in which any pre-requisite dependencies for the Service are completed, for example the collation of the Key Information.

If there is a requirement for any additional assessment of the Customer's operating environment following Softcat's receipt of the Key Information, this will be undertaken during the Onboarding Period.

The Activation Date for the Service will be the day on which the Onboarding Period ends, the Platform is active, and the Customer receives their log in.

3. SERVICE BILLING AND CONTRACT TERM

The billing frequency and the Initial Term will be agreed with the Customer and confirmed in the Work Order.

3.1 SERVICE BILLING AND INVOICING

The billing frequency will be agreed with the Customer and confirmed on the Work Order.

3.2 CONTRACT TERM AND SERVICE RENEWAL

The Contract Start Date and the Initial Term will be confirmed on the Work Order.

Where a Supported Product is added during an existing Term of the Service, where possible the Support for that Supported Product will co-terminate with the existing contract Term. Where this is not possible, Softcat will seek to agree a Term with the Customer for the additional Supported Product(s).

3.2.1 SNOW

Unless it is stated on the Work Order that the Service will not Auto-Renew, or written notice is given by either Party to the other of its intention not to renew the Contract at least 90 Working Days before the expiry of the Initial Term or any subsequent Renewal Term, the Service at the expiry of the Initial Term or any subsequent Renewal Term will be renewed automatically for a further term of three (3) years on the same Terms and Conditions as detailed within the Contract.

3.3 DATA RETENTION

Before Service end date, the Customer is responsible for exporting any required data from the Platform.

3.3.1 SNOW HOSTED

If the Customer chooses to give Notice to terminate the Service, data will be retained for ninety (90) days. During this time, the Platform will be kept online for the first thirty (30) days. After this period has elapsed, the Platform data will be exported and the server decommissioned. The exported data will be stored for a further sixty (60) days before being deleted. If the Customer account is reactivated within the first thirty (30) days, the Service can resume without incurring additional setup charges. However, if the account is reactivated after the initial thirty (30)-day period has elapsed, additional setup charges may be incurred. The retained data will not be accessible without an active Service and will be deleted following the ninety (90)-day period.

3.3.2 SNOW ATLAS

Customer data will be deleted as soon as possible following Service termination; no later than thirty (30) days after termination.

3.3.3 XENSAM

If the Customer chooses to give notice not to renew the Service, data will be retained for no more than thirty (30) days, in line with Xensam's data retention policies. If the account is reactivated during this time, the Service can resume without additional setup charges being incurred. The retained data is not accessible without an active Service and will be deleted following the thirty (30)-day period.

3.4 LICENCE MANAGEMENT

3.4.1 SNOW

Softcat will notify the Customer if usage exceeds the purchased amount of Snow Software licences. The Customer will be given the opportunity to remove machines from the licence count or increase the number of licences purchased. This is required to ensure the continued effective and correct functioning of the Service.

4. TERMS AND CONDITIONS

4.1 OVERVIEW OF TERMS AND CONDITIONS

The delivery of the Service to the Customer shall be governed by the Terms and Conditions and Work Order. This Service Description is deemed incorporated into the Work Order, but anything to the contrary in the remainder of the Work Order shall take precedence. In the event of any discrepancy or conflict between the Terms and Conditions and this Service Description, this Service Description shall take precedence.

Softcat Early Availability Terms and Conditions: <https://www.softcat.com/3616/9597/9013/early-availability-terms-and-conditions.pdf>

Softcat's Terms and Conditions: <https://www.softcat.com/terms-and-conditions-uk/>

Capitalised terms in this document shall have the meaning set out here:
<https://www.softcat.com/documents/glossary-and-definition-of-terms.pdf>

In the event of any discrepancy or conflict between the Softcat Terms and Conditions and this Service Description, this Service Description shall take precedence to the extent of any discrepancy or conflict.

For the purposes of the relevant Work Order and this Service Description, the term "Service" shall be interpreted as an "Annuity Service".

4.2 DATA PROCESSING AGREEMENT

By signing the Work Order, in addition to agreeing to the Service Description, the Customer agrees to the Data Processing Agreement (DPA), available here: <https://www.softcat.com/documents/Softcat-Services-DPA2019.pdf>

The DPA shall be a separate agreement to the Contract (and no liability shall arise (i) under this Contract in respect of the Processing, or (ii) under the Processing Agreement in respect of the remaining aspects of providing or using the Annuity Services).

If, in the absence of a signed Work Order but following receipt of this Service Description, the Customer provides a PO for the Services and/or instructs Softcat to provide the Services, the Customer shall be deemed to have accepted the Terms and conditions of the Contract, including the Service Description and the DPA.

4.3 ISO STANDARDS

The Service is fully compliant with the following ISO standards, ensuring the highest levels of quality, security and continuity:

- **ISO 20000** – Focuses on IT service management, ensuring that services are aligned with business needs and adhere to best practices. By following ISO 20000, the Service guarantees that the IT service management processes are efficient, effective, and continually improving to meet Customer evolving demands.
- **ISO 27001** - Dedicated to information security management systems. It helps organisations protect data and manage security risks systematically. Compliance with ISO 27001 ensures that robust security

measures are in place to safeguard sensitive information mitigate risks and respond promptly to security Incidents.

- **ISO 9001** – Addresses quality management systems. It ensures that the Service consistently meets Customer requirements and strives for continuous improvement. By adhering to ISO 9001, the Service demonstrates commitment to delivering high-quality services that enhance Customer satisfaction and operational excellence.
- **ISO 22301** – For business continuity management systems , helping organisations prepare for a respond to disruptive Incidents. Compliance with ISO 22301 ensures that the Service has comprehensive plans and procedures in place to maintain business operations during unforeseen events, thereby minimising downtime and ensuring service continuity.

