



eBook

# SolarWinds Deployment Services

IT Security

Onboarding Field Guide



# Overview

The Onboarding Field Guide aims to describe and document the Deployment Services onboarding process. This document will serve as a program guideline and outline for the scheduled Deployment Services training plan. We'll use this field guide to track engagement success as we progress in the program to ensure goals are clearly defined and met consistently, adequately, and efficiently.

Deployment Services are available for the following SolarWinds® IT Security products

- Security Event Manager (SEM)
- Patch Manager
- Access Rights Manager (ARM)

## DEPLOYMENT SERVICES PROGRAM

	SELF-LED	DS LITE (5 HRS.)	DS1 (30 HRS.)	DS2 (75 HRS.)	DS3 (125 HRS.)
• <a href="#">Security Event Manager (SEM)</a>	✓		✓		
• <a href="#">Patch Manager</a>	✓		✓		
• <a href="#">Access Rights Manager (ARM)</a>	✓		✓		

## DEPLOYMENT SERVICES

We'll provide project plans and videos, best practices during setup, and guides for getting started. We'll also help you orient to the Customer Success Center and THWACK® community. By the end of the process, you'll know how to get the answers you need when you need them.

## PURPOSE

- Set up your SolarWinds® product according to the best practices recommended by SolarWinds.
- Provide an understanding of how to use and configure the product for its intended purpose.
- Discuss resources offered by SolarWinds to help you get the most out of your product.

## PREPARATION

- Be prepared to start the engagement within a few weeks of purchase—Deployment Services onboarding engagements **must be completed within 60 days of purchase**.
- Please have the required infrastructure to run your product before starting the engagement.
- Make sure you've allocated time to complete the entire course, allowing for schedule constraints.

## LIMITATIONS OF DEPLOYMENT SERVICES ENGAGEMENT

- The program, partner success manager, and partner engineer won't provide on-site support.
- The program, partner success manager, and partner engineer won't develop custom scripts, templates, or queries.
- The program, partner success manager, and partner engineer won't take control of the customer's environment to perform installations, configurations, customizations, or migrations.
- The program, partner success manager, and partner engineer won't troubleshoot issues, but they'll assist in getting the proper technical support resources to address the issue effectively.



# Program Descriptions

Session topics provide an overall idea of what each session is all about. Targets and milestones describe the goals we aim to achieve in each scheduled meeting.

Each session is scheduled in two four-hour blocks.

## DEPLOYMENT SERVICES PHASES

1. Introduction
2. Platform Planning
3. Platform Setup
4. Platform Configuration
5. Observability And Alerts
6. Platform Training
7. Journey Success

## PREREQUISITES

**Deployment Services Welcome Call**—Your partner success manager will reach out to schedule an introductory call in which you'll meet your partner success manager and partner engineer, go over the program, and schedule your first Deployment Services session together.

**SolarWinds Platform Training**—We'll familiarize you with the SolarWinds® Platform.



## 1. Security Event Manager (SEM)

CATEGORY	ACTIVITIES	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
Introduction	<ul style="list-style-type: none"> <li>Welcome Call</li> <li>Deployment Service Overview</li> <li>Project Status Stoplight/Gainsight Workflow</li> <li>Customer Environment/Requirements</li> <li>Prerequisites</li> <li>Risk/Issues</li> <li>Check-In Calls</li> <li>Onboarding Sessions</li> </ul>	
Platform Planning	Duration	Up to 3 Hours
	Use Case Review	Up to Two (2)
	Deployment Planning Form	✓
	Deployment Project Plan	✓
Platform Installation	Duration	Up to 3 Hours
	Pre-installation Environment Review	✓
	Install SEM	Up to One (1)
	Configure Personal Cert for Web Console	✓
Platform Configuration	Duration	Up to 5 Hours
	Backend Configuration	✓
	LDAP Configuration	✓
	Install Nodes and Configure Manager Connectors	✓
	Install Nodes and Configure Connector Syslog	✓
	Install Nodes and Configure Agent Connectors	✓
	Email Configuration	✓
	Discuss the Difference—Raw and Parse Logging	✓
Observability and Alerts	Duration	Up to 14 Hours
	Create Dashboard View with Up to Three (3) Widgets	Up to One (1)
	Analyze Historical Data	✓
	Saved Searches	✓
	Schedule Saved Searches/Creation Reports	Up to Two (2)
	Purpose of Rules and Historical Searches	✓
	Configure Email Templates	✓
	Configure Rules	✓
Platform Training	<ul style="list-style-type: none"> <li>Working With Support</li> <li>THWACK</li> <li>SolarWinds Academy Virtual Classrooms</li> <li>Online Best Practices Articles</li> <li>General Overview Resources</li> </ul>	
Journey Success	<ul style="list-style-type: none"> <li>Deployment Summary</li> <li>Customer Survey</li> <li>Optimization</li> <li>Opportunities</li> <li>Customer Success Manager (CSM) Hand-Off Call</li> </ul>	



## 2. Patch Manager

CATEGORY	ACTIVITIES	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
Introduction	<ul style="list-style-type: none"> <li>Welcome Call</li> <li>Deployment Service Overview</li> <li>Project Status Stoplight/Gainsight Workflow</li> <li>Customer Environment/Requirements</li> <li>Prerequisites</li> <li>Risk/Issues</li> <li>Check-In Calls</li> <li>Onboarding Sessions</li> </ul>	
Platform Planning	Duration	Up to 3 Hours
	Use Case Review	Up to Two (2)
	Deployment Planning Form	✓
	Deployment Project Plan	✓
Platform Installation	Duration	Up to 3 Hours
	Pre-installation Environment Review	✓
	Install Patch Manager	Up to One (1)
Platform Configuration	Duration	Up to 5 Hours
	Add WSUS to Patch Manager	Up to One (1)
	Introduce Group Policy configuration	Up to One (1)
	Introduction and set up of Credential Ring	Up to One (1)
	Add Domain or Workgroup to Patch Manager	Up to One (1)
	Create WSUS Inventory or Managed Computer Inventory	Up to One (1)
	Create WSUS or Patch Manager Groups	Up to One (1)
	Introduce 3rd Party Update Synchronization	✓
	Set up of 3rd Party Update Synchronization	Up to One (1)
	Integrate Patch Manager to Orion Platform	✓
Observability and Alerts	Duration	Up to 14 Hours
	Introduce WMI connectivity to clients	✓
	Add clients to be managed via WMI	Up to Three (3)
	Introduce Patch Manager Agent and its requirements	✓
	Add clients to be managed via Agent	Up to Three (3)
	Introduce the Patch Manager Dashboard	✓
	Introduce Approving, Declining, Managing Windows and 3rd Party Updates	✓
	Introduce Update Management and Update Management Wizard	✓
	Scheduling Tasks	Up to One (1)
	Create Custom Package	Up to One (1)
	Introduction on Downloading and Publishing 3rd Party Packages to WSUS	✓
	Integrate Patch Manager to Orion Platform	Up to One (1)
Platform Training	<ul style="list-style-type: none"> <li>Working With Support</li> <li>THWACK</li> <li>SolarWinds Academy Virtual Classrooms</li> <li>Online Best Practices Articles</li> <li>General Overview Resources</li> </ul>	



CATEGORY	ACTIVITIES	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
<b>Journey Success</b>	<ul style="list-style-type: none"><li>• Deployment Summary</li><li>• Customer Survey</li><li>• Optimization</li><li>• Opportunities</li><li>• Customer Success Manager (CSM) Hand-Off Call</li></ul>	



### 3. Access Rights Manager (ARM)

CATEGORY	ACTIVITIES	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
Introduction	<ul style="list-style-type: none"> <li>Welcome Call</li> <li>Deployment Service Overview</li> <li>Project Status Stoplight/Gainsight Workflow</li> <li>Customer Environment/Requirements</li> <li>Prerequisites</li> <li>Risk/Issues</li> <li>Check-In Calls</li> <li>Onboarding Sessions</li> </ul>	
Platform Planning	Duration	Up to 3 Hours
	Use Case Review	Up to Two (2)
	Deployment Planning Form	✓
	Deployment Project Plan	✓
Platform Installation	Duration	Up to 3 Hours
	Confirming Installation of ARM	✓
	Install FAT and web client	✓
	Install Collector	✓
Platform Configuration	Duration	Up to 5 Hours
	Configuration of ARM	✓
	License ARM	✓
	Walkthrough of Rich and Web Client	✓
Observability and Alerts	Duration	Up to 14 Hours
	Alerting in AD and File shares	Up to One (1)
	Reporting on demand and scheduled	✓
	Use case for Exchange	✓
Platform Training	<ul style="list-style-type: none"> <li>Working With Support</li> <li>THWACK</li> <li>SolarWinds Academy Virtual Classrooms</li> <li>Online Best Practices Articles</li> <li>General Overview Resources</li> </ul>	
Journey Success	<ul style="list-style-type: none"> <li>Deployment Summary</li> <li>Customer Survey</li> <li>Optimization</li> <li>Opportunities</li> <li>Customer Success Manager (CSM) Hand-Off Call</li> </ul>	





## ABOUT SOLARWINDS

SolarWinds (NYSE:SWI) is a leading provider of simple, powerful, and secure IT management software built to enable customers to accelerate their digital transformation. Our solutions provide organizations worldwide—regardless of type, size, or complexity—with a comprehensive and unified view of today's modern, distributed, and hybrid network environments. We continuously engage with technology professionals—IT service and operations professionals, DevOps and SecOps professionals, and database administrators (DBAs)—to understand the challenges they face in maintaining high-performing and highly available IT infrastructures, applications, and environments. The insights we gain from them, in places like our [THWACK®](#) community, allow us to address customers' needs now and in the future. Our focus on the user and our commitment to excellence in end-to-end hybrid IT management have established SolarWinds as a worldwide leader in solutions for observability, IT service management, application performance, and database management. Learn more today at [www.solarwinds.com](https://www.solarwinds.com).



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