



SolarWinds Deployment Services

Server & Application Management
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 Server & Application Management products:

- Server & Application Monitor (SAM)
- Storage Resource Monitor (SRM)
- Virtualization Manager (VMAN)
- Web Performance Monitor (WPM)

DEPLOYMENT SERVICES PROGRAM

	SELF-LED	DS LITE (5 HRS.)	DS1 (30 HRS.)	DS2 (75 HRS.)	DS3 (125 HRS.)
• Server & Application Monitor (SAM)	✓		✓		
• Storage Resource Monitor (SRM)	✓		✓		
• Virtualization Manager (VMAN)	✓		✓		
• Web Performance Monitor (WPM)	✓		✓		

* Scalability licenses are purchased separately

DEPLOYMENT SERVICES

We'll provide project plans and videos, best practices during setup, and guides for getting started. We'll help orient you 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 SolarWinds offers 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 best.

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. Server & Application Monitor (SAM)

CATEGORY	ACTIVITIES			Deployment Services Level 1 30-hour limit
Introduction	<ul style="list-style-type: none">Welcome CallDeployment Service OverviewProject Status Stoplight/Gainsight WorkflowCustomer Environment/RequirementsPrerequisitesRisk/IssuesCheck-In CallsOnboarding Sessions			
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
	Scalability	Pre-installation Environment Review		✓
		Install MPE		Up to Two (2)
		Install Scalability Engines	APE	Up to One (1)
			AWS	Up to One (1)
		Install EOC		Up to One (1)
		Install HA	MPE	Up to Two (2)
			APE	Up to One (1)
Platform Configuration	Duration			Up to 5 Hours
	Provision SNMP and WMI Credentials			Up to Five (5) Total
	Understand Permissions in Platform			✓
	Create Local Accounts			Up to Three (3)
	Credential Integration of Orion Account Group with Active Directory® or Azure®			✓
	Credential Integration of Orion Account Groups with SAML			✓
	Configuration of HTTPS Web Console Configuration for MPE, AWS, and EOC			✓
	Highlight important SAM Settings			✓
	Provide permissions for Hardware Health monitoring on Dell, HPE, and IBM devices			✓
Observability and Alerts	Duration			Up to 14 Hours
	Create and run Network Discoveries with Up to Twenty (20) Devices each			Up to Two (2)
	Introduce Orion® Agents			✓
	Add Nodes Manually (including Orion Agents) Agent dependent: - LA (Optional) - SAM (Optional) - SCM (Required for file/registry/PowerShell monitoring)			Up to Five (5)
	Add Virtual Servers (includes Hyper-V/Nutanix/VMWare)			Up to One (1)

CATEGORY	ACTIVITIES	Deployment Services Level 1 30-hour limit
	Introduce Custom Properties	✓
	Create Custom Properties	Up to Three (3)
	Create Groups with entities either 1. Up to One (1) Dynamic; OR 2. Up to Three (3) Static	Up to Five (5)
	Introduce Dependencies	✓
	Create Dependencies with entities either 1. Up to One (1) Dynamic; OR 2. Up to Three (3) Static	Up to One (1)
	Introduce Alerts and Reports	✓
	Create Alerts using Up to Five (5) built-in fields each	Up to Three (3)
	Create Reports using Up to Five (5) built-in fields each	Up to Two (2)
	Create Modern Dashboard with Up to Three (3) each 1. Using built-in Widgets; OR 2. Using Graphical Query Builder	Up to One (1)
	Introduce PerfStack™	✓
	Create PerfStack™ with Up to Three (3) entities each	Up to One (1)
	Introduce Maps and Topology	✓
	Create Maps with Up to Five (5) entities each	Up to One (1)
	Introduce SAM	✓
	Introduce Component Monitor Wizard	✓
	Introduce Real-time Processing and Explorer	✓
	SAM Component Types Overview	✓
	Introduce Hardware Health for Dell, HP, HPE Proliant, and IBM devices.	✓
	Create Application Monitors/Templates with Up to Five (5) Components each	Up to Ten (10)
	Set up ApplInsight™ for SQL Monitor	Up to Two (2)
	Set up ApplInsight™ for Exchange Monitor	Up to Two (2)
	Set up ApplInsight™ for IIS Monitor	Up to Two (2)
	Set up ApplInsight™ for Active Directory Monitor	Up to Two (2)
	Introduce Application Dependency	✓
	Enable Application Dependency (Connection Quality Polling requires Agent)	Up to One (1)
Platform Training	<ul style="list-style-type: none"> Working With Support THWACK® SolarWinds Academy Virtual Classrooms Online Best Practices Articles General Overview Resources 	
Journey Success	<ul style="list-style-type: none"> Deployment Summary Customer Survey Optimization Opportunities Customer Success Manager (CSM) Hand-Off Call 	



2. Storage Resource Monitor (SRM)

CATEGORY	ACTIVITIES			DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
Introduction	<ul style="list-style-type: none">• Welcome Call• Deployment Service Overview• Project Status Stoplight/Gainsight Workflow• Customer Environment/Requirements• Prerequisites• Risk/Issues• Check-In Calls• Onboarding Sessions			
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
	Scalability	Pre-installation Environment Review		✓
		Install MPE		Up to Two (2)
		Install Scalability Engines	APE	Up to One (1)
			AWS	Up to One (1)
		Install EOC		Up to One (1)
		Install HA	MPE	Up to Two (2)
			APE	Up to One (1)
Platform Configuration	Duration			Up to 5 Hours
	Provision SNMP and WMI Credentials			Up to Five (5) Total
	Understand Permissions in Platform			✓
	Create Local Accounts			Up to Three (3)
	Credential Integration of Orion Account Group with Active Directory® or Azure®			✓
	Credential Integration of Orion Account Groups with SAML			✓
	Configuration of HTTPS Web Console Configuration for MPE, AWS, and EOC			✓
	Highlight Important SRM Settings			✓
	Provide SRM Array Compatibility Check and Prerequisites			✓
	Highlight Configuration of Storage Arrays			✓
	Observability and Alerts	Duration		
Create and run Network Discoveries with Up to Twenty (20) Devices each			Up to Two (2)	
Introduce Orion® Agents			✓	
Add Nodes Manually (including Orion Agents) Agent dependent: - LA (Optional) - SAM (Optional) - SCM (Required for file/registry/Powershell monitoring)			Up to Five (5)	
Add Virtual Servers (includes Hyper-V/Nutanix/VMWare)			Up to One (1)	
Introduce Custom Properties			✓	
Create Custom Properties			Up to Three (3)	
Create Groups with entities either 1. Up to One (1) Dynamic; OR 2. Up to Three (3) Static			Up to Five (5)	

CATEGORY	ACTIVITIES	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
	Introduce Dependencies	✓
	Create Dependencies with entities either 1. Up to One (1) Dynamic; OR 2. Up to Three (3) Static	Up to One (1)
	Introduce Alerts and Reports	✓
	Create Alerts using Up to Five (5) built-in fields each	Up to Three (3)
	Create Reports using Up to Five (5) built-in fields each	Up to Two (2)
	Create Modern Dashboard with Up to Three (3) each 1. Using built-in Widgets; OR 2. Using Graphical Query Builder	Up to One (1)
	Introduce PerfStack™	✓
	Create PerfStack™ with Up to Three (3) entities each	Up to One (1)
	Introduce Maps and Topology	✓
	Create Maps with Up to Five (5) entities each	Up to One (1)
	Introduce SRM	✓
	Add Storage Array	Up to Five (5)
	Introduce SRM Summary Views	✓
	Introduce Storage Array Thresholds	✓
	Introduce Storage Controller Monitoring	✓
	Introduce AppStack™ and SRM	✓
	Introduce Capacity Planning	✓
	Introduce Performance Monitoring	✓
	Introduce Array polling frequencies	✓
	Introduce Hardware Health	✓
	Highlight EMC XtremIO and Pure Storage capacity savings technologies	✓
	Highlight Monitoring File Storage for EMC VNX Arrays	✓
	Introduce Managing Storage Object	✓
	Introduce Mapping Storage forest of Platform	✓
	Introduce SRM Alerts and Reports	✓
Platform Training	<ul style="list-style-type: none"> Working With Support THWACK® SolarWinds Academy Virtual Classrooms Online Best Practices Articles General Overview Resources 	
Journey Success	<ul style="list-style-type: none"> Deployment Summary Customer Survey Optimization Opportunities Customer Success Manager (CSM) Hand-Off Call 	



3. Virtualization Manager (VMAN)

CATEGORY	ACTIVITIES			DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
Introduction	<ul style="list-style-type: none">• Welcome Call• Deployment Service Overview• Project Status Stoplight/Gainsight Workflow• Customer Environment/Requirements• Prerequisites• Risk/Issues• Check-In Calls• Onboarding Sessions			
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
	Scalability	Pre-installation Environment Review		✓
		Install MPE		Up to Two (2)
		Install Scalability Engines	APE	Up to One (1)
			AWS	Up to One (1)
		Install EOC		Up to One (1)
		Install HA	MPE	Up to Two (2)
			APE	Up to One (1)
Platform Configuration	Duration			Up to 5 Hours
	Provision SNMP and WMI Credentials			Up to Five (5) Total
	Understand Permissions in Platform			✓
	Create Local Accounts			Up to Three (3)
	Credential Integration of Orion Account Group with Active Directory® or Azure®			✓
	Credential Integration of Orion Account Groups with SAML			✓
	Configuration of HTTPS Web Console Configuration for MPE, AWS and EOC			✓
	Provide requirements of monitoring in VMAN			✓
	Introduce VMAN Overview and Web Pages			✓
	Highlight important VMAN Settings			✓
Observability and Alerts	Duration			Up to 14 Hours
	Create and run Network Discoveries with Up to Twenty (20) Devices each			Up to Ten (10)
	Introduce Orion® Agents			✓
	Add Nodes Manually (including Orion Agents) Agent dependent: - LA (Optional) - SAM (Optional) - SCM (Required for file/registry/Powershell monitoring)			Up to Twenty (20)
	Add Virtual Servers (includes Hyper-V/Nutanix/VMWare)			Up to Five (5)
	Add Cloud Infrastructure			Up to Two (2)
	Introduce Custom Properties			✓
	Create Custom Properties			Up to Fifteen (15)



CATEGORY	ACTIVITIES	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
	Create Groups with entities either 1. Up to One (1) Dynamic; OR 2. Up to Three (3) Static	Up to Twenty (20)
	Introduce Dependencies	✓
	Create Dependencies with entities either 1. Up to One (1) Dynamic; OR 2. Up to Three (3) Static	Up to Five (5)
	Introduce Alerts and Reports	✓
	Create Alerts using Up to Five (5) built-in fields each	Up to Ten (10)
	Create Reports using Up to Five (5) built-in fields each	Up to Seven (7)
	Create Modern Dashboard with Up to Three (3) each 1. Using built-in Widgets; OR 2. Using Graphical Query Builder	Up to Five (5)
	Introduce PerfStack™	✓
	Create PerfStack™ with Up to Three (3) entities each	Up to Five (5)
	Introduce Maps and Topology	✓
	Create Maps with Up to Five (5) entities each	Up to Three (3)
	Introduce VMAN	✓
	Learn More about VMAN polling and pollers	✓
	Ensure that Virtual Servers added are using VMAN polling	✓
	Introduce VMAN features: Recommendations, the Sprawl dashboard, snapshot management, orphan VMDK management, PerfStack, and AppStack	✓
	Introduce VMAN Alerts and Reports	✓
Platform Training	<ul style="list-style-type: none"> Working With Support THWACK® SolarWinds Academy Virtual Classrooms Online Best Practices Articles General Overview Resources 	
Journey Success	<ul style="list-style-type: none"> Deployment Summary Customer Survey Optimization Opportunities Customer Success Manager (CSM) Hand-Off Call 	



4. Web Performance Monitor (WPM)

CATEGORY	ACTIVITIES			DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
Introduction	<ul style="list-style-type: none">• Welcome Call• Deployment Service Overview• Project Status Stoplight/Gainsight Workflow• Customer Environment/Requirements• Prerequisites• Risk/Issues• Check-In Calls• Onboarding Sessions			
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
	Scalability	Pre-installation Environment Review		✓
		Install MPE		Up to Two (2)
		Install Scalability Engines	APE	Up to One (1)
			AWS	Up to One (1)
		Install EOC		Up to One (1)
		Install HA	MPE	Up to Two (2)
	APE		Up to One (1)	
Platform Configuration	Duration			Up to 5 Hours
	Provision SNMP and WMI Credentials			Up to Five (5) Total
	Understand Permissions in Platform			✓
	Create Local Accounts			Up to Three (3)
	Credential Integration of Orion Account Group with Active Directory® or Azure®			✓
	Credential Integration of Orion Account Groups with SAML			✓
	Configuration of HTTPS Web Console Configuration for MPE, AWS, and EOC			✓
	Manage WPM Player service accounts			✓
	Introduce WPM Recorder configuration file			✓
	Configure proxies for WPM transaction locations and transactions			✓
Observability and Alerts	Duration			Up to 14 Hours
	Create and run Network Discoveries with Up to Twenty (20) Devices each			Up to Two (2)
	Introduce Orion® Agents			✓
	Add Nodes Manually (including Orion Agents) Agent dependent: - LA (Optional) - SAM (Optional) - SCM (Required for file/registry/Powershell monitoring)			Up to Five (5)
	Add Virtual Servers (includes Hyper-V/Nutanix/VMWare)			Up to One (1)
	Introduce Custom Properties			✓
	Create Custom Properties			Up to Three (3)
	Create Groups with entities either 1. Up to One (1) Dynamic; OR 2. Up to Three (3) Static			Up to Five (5)
	Introduce Dependencies			✓



CATEGORY	ACTIVITIES	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
	Create Dependencies with entities either 1. Up to One (1) Dynamic; OR 2. Up to Three (3) Static	Up to One (1)
	Introduce Alerts and Reports	✓
	Create Alerts using Up to Five (5) built-in fields each	Up to Three (3)
	Create Reports using Up to Five (5) built-in fields each	Up to Two (2)
	Create Modern Dashboard with Up to Three (3) each 1. Using built-in Widgets; OR 2. Using Graphical Query Builder	Up to One (1)
	Introduce PerfStack™	✓
	Create PerfStack™ with Up to Three (3) entities each	Up to One (1)
	Introduce Maps and Topology	✓
	Create Maps with Up to Five (5) entities each	Up to One (1)
	Introduce WPM	✓
	Introduce Transaction Recorder features	✓
	Work with WPM recordings that traverse proxy servers	✓
	Work with client certificates in WPM recordings	✓
	Add authentication to steps in WPM recordings	✓
	Create Transactions with Up to Five (5) Steps each	Up to Five (5)
	Introduce Export and Import Recordings	✓
	Add WPM Player	Up to Five (5)
	Assign Up to Three (3) Transaction to WPM Player	Up to Three (3)
	Introduce WPM Alerts	✓
Platform Training	<ul style="list-style-type: none"> Working With Support THWACK® SolarWinds Academy Virtual Classrooms Online Best Practices Articles General Overview Resources 	
Journey Success	<ul style="list-style-type: none"> Deployment Summary Customer Survey Optimization Opportunities Customer Success Manager (CSM) Hand-Off Call 	



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.



For additional information, please contact SolarWinds at [866.530.8100](tel:866.530.8100) or email sales@solarwinds.com. To locate an international reseller near you, visit [SolarWinds Partner Page](#).

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