SOLARWINDS

eBook

SolarWinds Deployment Services

SolarWinds Web Help Desk (WHD) Onboarding Field Guide

Last updated in 2025.H2

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 through the program, ensuring goals are clearly defined and consistently, adequately, and efficiently met.

Deployment Services are available for the following SolarWinds IT service management products:

- SolarWinds® Web Help Desk® (WHD™)

DEPLOYMENT SERVICES PROGRAM

	SELF-LED	DS LITE (Up to 5 HRS.)	DS1 (Up to 30 HRS.)
• SolarWinds Web Help Desk (WHD)	✓	✓	✓

Click here to learn more about the other products that are covered by the Deployment Services program.

Key Differences Between the Deployment Services Options

ACTIVITIES	CATEGORY	DS LITE	DS1
Introducing Installation Requirements and License Activation	Core	✓	✓
Providing Installation Guidance	Core		✓
Introducing Installation to Use External Databases	Core		✓
Activating Single Sign-On for Supported Methods	Advanced		✓
Importing Clients: 　• Active Directory/Lightweight Directory Access Protocol Connections for Importing 　• WHD Import Tool	Advanced		✓
Setting Up Client and Tech Accounts	Basic	One (1)	Up to Two (2)
Setting Up Incoming and Outgoing Email Accounts	Basic	One (1)	Up to Two (2)
Integrating With Dameware® Mini Remote Control	Advanced		✓
Integrating With SolarWinds Observability Self-Hosted Alerts	Advanced		✓
Creating Request Type	Basic	One (1)	One (1)
Creating Client Custom Fields	Basic	One (1)	One (1)
Creating Ticket Custom Fields	Basic	One (1)	One (1)
Creating Parent/Child Service Relationships	Advanced		One (1)
Introducing Ticket Routing and Approval Processes	Advanced		✓
Escalating and De-Escalating Tickets	Advanced		✓
Introducing and Setting Up Ticket Creation From Incoming Emails	Advanced		One (1)
Creating an FAQ	Basic	One (1)	One (1)
Creating a Location for Use With Assets	Basic	One (1)	One (1)
Discovering an Asset Using One of the Supported Methods	Basic	✓	✓
Configuring the Discovery Engine (WMI)	Advanced		✓
Setting Up the Asset Lease or Warranty Expiration Notifications	Advanced		One (1)
Adding a Custom Logo to the Dashboard	Core		✓
Setting Up and Modifying the Predefined Technician Dashboard	Core	Either One (1)	Up to One (1)
Setting Up and Modifying the Predefined Management Dashboard	Core		Up to One (1)
Exporting Ticket Information in Tab-Separated Value (TSV) Format	Core	✓	✓
Setting Up a Ticket Email Alert	Alert	Up to One (1)	Up to One (1)
Setting Up Automatic Escalations	Advanced		Up to One (1)
Managing Surveys and Feedback	Advanced		✓
Suggesting Training Programs	Advanced		✓

Deployment Service Recommendations

Web Help Desk

- Deployment Services Lite (DS Lite) is a guided orientation that entails limited setup, configuration overview, and one or two examples per section

- Deployment Services 1 (DS1) is a hands-on deployment engagement, covering installation, integrations, workflow configuration, dashboards, automation, and client enablement

DEPLOYMENT SERVICES

We'll provide project plans and videos, best practices for setup, and guides to help you get started. We'll also help you get oriented to the Customer Success Center and the 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 recommended best practices
- Provide an understanding of how to use and configure the product for its intended purpose
- Discuss the 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 deployment engineer won't provide onsite support
- The deployment engineer won't develop custom scripts, templates, or queries
- The deployment engineer won't take control of the customer's environment to perform installations, configurations, customizations, or migrations
- The deployment engineer won't troubleshoot issues, but they'll help you reach the proper technical support resource to best address the issue

Program Descriptions

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

Each session is scheduled according to your availability.

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 deployment manager will reach out to schedule an introductory call to meet you, go over the program, and plan your ongoing deployment sessions

SolarWinds Platform Training — We'll familiarize you with Web Help Desk

SolarWinds Web Help Desk (WHD)

CATEGORY	ACTIVITIES		DEPLOYMENT SERVICES LITE 5-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
Introduction	• Welcome Call • Deployment Services Overview • Project Status Tracking • Customer Environment/Requirements • Prerequisites • Risks/Issues • Check-In Calls • Onboarding Sessions			
Platform Planning	**Duration**		**Up to 2 Hours**	**Up to 4 Hours**
	Use Case Review		Up to Two (2)	Up to Three (3)
	Deployment Project Plan		✓	✓
Platform Installation	Introducing Installation and Port Requirements		✓	✓
	Preparing the WHD Database		✓	✓
	Preparing the WHD Server		✓	✓
	Installing WHD			✓
	Introducing WHD Installation With External Databases			✓
	Activating the WHD License		✓	✓
Platform Setup	**Security**	Introducing HTTPS Behavior in WHD	✓	✓
		Introducing Single Sign-On for Supported Methods		✓
	Setting Up Accounts	Introducing Client and Tech Permissions	✓	✓
		Introducing Methods to Create Client Accounts	✓	✓
		Introducing Importing Active Directory/Lightweight Directory Access Protocol Directory Connections		✓
		Introducing Importing Clients Using the Data Import Tool in WHD		✓
		Creating **One (1)** Client and **One (1)** Tech Account	Up to One (1)	Up to Two (2)
		Introducing Defining Tech Permissions	✓	✓
		Introducing Client Custom Fields	✓	✓
		Configuring **One (1)** Outgoing and **One (1)** Incoming Email Account in the Supported Platform	Up to One (1)	Up to Two (2)
	Integration	Integrating WHD into Self-Hosted Alerts		✓
		Integrating WHD With Dameware Mini Remote Control (MRC) (Requires Dameware MRC Installed)		✓
		Introducing Configuring the Authentication Settings	✓	✓
Platform Configuration	**Tickets**	Introducing Request Types and Tech Groups	✓	✓
		Introducing Ticket Assignment Logic	✓	✓
		Introducing Planning Request Types and Tech Groups		✓
		Introducing Defining Request Types		✓
		Creating **One (1)** Request Type	Up to One (1)	Up to One (1)
		Introducing Defining Tech Groups		✓
		Introducing Defined Ticket Options		✓
		Introducing and Configuring the Ticket Status Types		✓
		Creating the Ticket Custom Fields	Up to One (1)	Up to One (1)
		Introducing Ticket Actions		✓
		Creating Parent/Child Service Relationships		Up to One (1)
		Introducing Escalating and De-Escalating Tickets		✓

CATEGORY		ACTIVITIES	DEPLOYMENT SERVICES LITE 5-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
Observability and Alerts / (top section unlabeled)	**Workflow**	Introducing the Definition of the Ticket Routing Processes		✔
		Introducing How Approval Processes Work		✔
		Introducing Ticket Creation From Incoming Emails		✔
		Setting Up Ticket Creation From Incoming Emails		Up to One (1)
		Introducing Knowledge-Centered Support	✔	✔
		Introducing Creating an FAQ	✔	✔
		Creating **One (1)** FAQ	Up to One (1)	Up to One (1)
		Introducing Searching FAQs		✔
		Introducing How to View or Edit an FAQ		✔
		Introducing Linking an FAQ to a Support Ticket	✔	✔
	Asset and Inventory Management	Introducing How Asset Management Works	✔	✔
		Creating and Searching for a Location	Up to One (1)	Up to One (1)
		Creating Assets, Status, and Warranty Types		Up to One (1)
		Adding a Manufacturer and Model		Up to One (1)
		Discovering an Asset Using One of the Supported Methods	✔	✔
		Introducing and Configuring the Discovery Engine (WMI)		✔
		Introducing the Creation of Parent/Child Associations on Assets		Up to One (1)
		Assigning an Existing Asset to a Client		Up to One (1)
		Setting Up the Asset Lease or Warranty Expiration Notifications		Up to One (1)
		Introducing Purchase Orders		✔
		Introducing Reserve Assets		✔
Observability and Alerts	**Dashboards and Reports**	Introducing Creating Dashboards for Admin and Tech	✔	✔
		Adding a Custom Logo	✔	✔
		Setting Up and Modifying the Predefined Technician Dashboard	Either One (1)	Up to One (1)
		Setting Up and Modifying the Predefined Management Dashboard		Up to One (1)
		Introducing Creation Reports	✔	✔
		Exporting Ticket Information in Tab-Separated Value (TSV) Format	✔	✔
		Creating a Custom Report		Up to One (1)
		Introducing Scheduling Reports		✔
		Introducing Parts and Billing		✔
	Alerts and Automation	Introducing the Priority Types and Alerts	✔	✔
		Setting Up a Ticket Email Alert	Up to One (1)	Up to One (1)
		Setting Up Automatic Escalations		Up to One (1)
	Survey	Managing Client Feedback		✔
		Creating a Client Survey		Up to One (1)
		Introducing Creating Messages for Clients and Techs		✔
		Creating Messages for Clients and Techs		Up to One (1)
		Sending Email Ticket Surveys		✔
		Viewing Ticket and Survey Results		✔
	Developing Training Materials	Introducing How to Train the Techs		✔
		Introducing How to Train the Clients		✔

CATEGORY	ACTIVITIES	DEPLOYMENT SERVICES LITE 5-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
Platform Training	• Working With Support • THWACK® • SolarWinds Academy™ Virtual Classrooms • Online Best Practices Articles • General Overview Resources		
Journey Success	• Deployment Summary • Customer Survey • Optimization • Opportunities • Customer Success Manager Hand-Off Call		

ABOUT SOLARWINDS

SolarWinds 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 such as 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.