



SolarWinds Deployment Services

IT Service Management (ITSM) 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 ITSM products:

- SolarWinds® Service Desk

DEPLOYMENT SERVICES PROGRAM

	SELF-LED	DS LITE (Up to 5 HRS)	DS1 (Up to 30 HRS)	DS2 (Up to 75 HRS)	DS3 (Up to 125 HRS)
• SolarWinds Service Desk – Essentials	✓	✓	✓		
• SolarWinds Service Desk – Advanced	✓	✓	✓	✓	✓
• SolarWinds Service Desk – Premier	✓	✓	✓	✓	✓

Click [here](#) to learn more about the other products covered by the Deployment Services program.

SolarWinds Service Desk Subscription Model

The SolarWinds Service Desk subscription model has three tiers: Essentials, Advanced, and Premier. [Learn more.](#)



Key Differences Between the Deployment Services Options

ACTIVITIES	ESSENTIALS		ADVANCED				PREMIER			
	DS LITE	DS1	DS LITE	DS1	DS2	DS3	DS LITE	DS1	DS2	DS3
Fundamental Setup	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Incident Management	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ESM *	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Service Catalog and Automation				✓	✓	✓		✓	✓	✓
Change Management					✓	✓			✓	✓
CMDB ** Network Discovery					✓	✓			✓	✓
Integrate with the SolarWinds Platform				✓	✓	✓	✓	✓	✓	✓
Introducing Process Integration with Other Tools						✓				✓
Introducing AI Operations							✓	✓	✓	✓

* Enterprise Service Management

** Configuration Management Database

Deployment Service Recommendations

SolarWinds Service Desk

- Deployment Services Lite (DS Lite) introduces the fundamentals of SolarWinds Service Desk capabilities through best practices and experienced guidance with limited emphasis on implementation; it is excellent for small setups looking for a quick start with limited needs for advanced features
- Deployment Services Level 1 (DS1) is the most popular option, suitable for standard SolarWinds Service Desk implementations, general use cases, and workflow
- Deployment Services Level 2 (DS2) is designed for Advanced or Premier subscription functionalities, with extensive focus on automation, workflows, and ITIL practices
- Deployment Services Level 3 (DS3) offers comprehensive deployment coverage, focused on the most robust areas of SolarWinds Service Desk, and is recommended for the largest service desk environments or organizations needing full-scale service desk capabilities



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 best practices recommended by SolarWinds
- 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 achievable goals 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 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 SolarWinds Service Desk



1. SolarWinds Service Desk – Essentials

CATEGORY	ACTIVITIES		DEPLOYMENT SERVICES LITE 5-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
Introduction	<ul style="list-style-type: none"> Welcome Call Deployment Services Overview Project Status Tracking Customer Environment/Requirements Prerequisites Risk/Issues Check-In Call 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 Setup	Security	Reviewing Single Sign-On Documentation	✓	✓
	Roles	Setting Up Roles and Permissions	Up to One (1)	Up to Three (3)
	Platform	Introducing Enterprise Service Management (ESM) Software	✓	✓
		Communicating the Post-ESM Migration Impact	✓	✓
		Activating ESM	✓	✓
		Adding Service Providers		One (1)
		Introducing Differences Between Normal and ESM Settings		✓
		Conducting ESM Acceptance Test *	✓	✓
		Setting Up Sites and Departments	✓	✓
		Reviewing User Provisioning Documentation	✓	✓
		Setting Up Business Hours	✓	✓
		Setting Up Categories and Subcategories	✓	✓
		Setting Up Groups and Queues	✓	✓
		Introducing Custom States	✓	✓
		Introducing Integration With SolarWinds Platform	✓	✓
Platform Configuration	Service Management	Introducing Incident Management	✓	✓
		Introducing Satisfaction Surveys	✓	✓
		Introducing Service Catalog	✓	✓
		Introducing Problem Management	✓	✓
		Introducing Release Management	✓	✓
		Introducing Service Level Agreements	✓	✓
		Creating Service Level Agreements	Up to One (1)	Up to Five (5)
		Introducing Change Management	✓	✓
		Configuring Solutions	Up to One (1)	Up to Five (5)
	Configuration Management Database	Creating Configuration Item (CI)	Up to Two (2)	Up to Six (6)
		Setting Up CI Field Dependency	✓	✓
		Introducing Exporting CIs		✓

CATEGORY	ACTIVITIES		DEPLOYMENT SERVICES LITE 5-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
	Platform	Introducing Key SolarWinds Service Desk Settings	✓	✓
		Introducing Email Dropbox® Settings	✓	✓
		Assisting With Setting Up Email Dropbox		✓
Observability and Alerts	IT Asset Management	Installing Discovery Agent	✓	✓
		Introducing Mobile Device Tracking	✓	✓
		Introducing Other Assets	✓	✓
		Introducing Purchase Order Management	Up to One (1)	Up to Four (4)
	Platform	Setting Up Dashboards With Up to Five (5) Widgets	Up to One (1)	Up to Two (2)
		Providing Information on Useful Portal Customization	✓	✓
		Providing Information on Export Reports or Views		✓
		Introducing 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 Hand-Off Call 			

* For issues post-ESM migration, a support ticket will have to be raised



2. SolarWinds Service Desk – Advanced

CATEGORY	ACTIVITIES		DEPLOYMENT SERVICES LITE 5-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 2 75-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 3 125-HOUR LIMIT
Introduction	<ul style="list-style-type: none"> Welcome Call Deployment Service Services Overview Project Status Tracking Customer Environment/Requirements Prerequisites Risk/Issues Check-In Calls Onboarding Sessions 					
Platform Planning	Duration		Up to 2 Hours	Up to 4 Hours	Up to 8 Hours	Up to 8 Hours
	Use Case Review		Up to Two (2)	Up to Three (3)	Up to Five (5)	Up to Five (5)
	Deployment Project Plan		✓	✓	✓	✓
Platform Setup	Security	Reviewing Single Sign-On Documentation	✓	✓	✓	✓
	Roles	Setting Up Roles and Permissions	Up to One (1)	Up to Three (3)	Up to Five (5)	Up to Ten (10)
	Platform	Introducing Domain Management		✓	✓	✓
		Introducing Enterprise Service Management (ESM) Software	✓	✓	✓	✓
		Communicating the Post-ESM Migration Impact	✓	✓	✓	✓
		Activating ESM	✓	✓	✓	✓
		Adding Service Providers		One (1)	Up to Two (2)	Up to Three (3)
		Introducing Differences Between Normal and ESM Settings		✓	✓	✓
		Conducting ESM Acceptance Test *	✓	✓	✓	✓
		Setting Up Sites and Departments	✓	✓	✓	✓
		Reviewing User Provisioning Documentation	✓	✓	✓	✓
		Setting Up Business Hours	✓	✓	✓	✓
		Setting Up Categories and Subcategories	✓	✓	✓	✓
		Setting Up Groups and Queues	✓	✓	✓	✓
		Introducing Custom States	✓	✓	✓	✓
		Introducing Integration With SolarWinds Observability Self-Hosted	✓	✓	✓	✓
		Scheduling Data Backup		✓	✓	✓
		Introducing the Microsoft® Power BI Connector		✓	✓	✓
	Service Management	Branding and Setting Up the Service Portal		✓	✓	✓
Platform Configuration	Service Management	Introducing Incident Management	✓	✓	✓	✓
		Introducing Satisfaction Surveys	✓	✓	✓	✓
		Introducing Service Catalog	✓	✓	✓	✓
		Introducing Dynamic Approvers			✓	✓
		Providing Guidance to Create a Standalone Service Catalog		Up to One (1)	Up to Five (5)	Up to Ten (10)
		Introducing Process Integration With Other Products				✓
		Introducing Problem Management	✓	✓	✓	✓

CATEGORY	ACTIVITIES		DEPLOYMENT SERVICES LITE 5-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 2 75-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 3 125-HOUR LIMIT
		Introducing Release Management	✓	✓	✓	✓
		Introducing Service Level Agreements	✓	✓	✓	✓
		Creating Service Level Agreements	Up to One (1)	Up to Two (2)	Up to Five (5)	Up to Ten (10)
		Introducing Change Management	✓	✓	✓	✓
		Introducing Change Catalog		✓	✓	✓
		Defining Change Plans		Up to One (1)	Up to Two (2)	Up to Three (3)
		Introducing Response Templates		✓	✓	✓
		Creating Response Templates		Up to One (1)	Up to Two (2)	Up to Five (10)
		Introducing My Tasks and Approvals		✓	✓	✓
		Setting Up Automation Rules		Up to Two (2)	Up to Five (5)	Up to Ten (10)
		Introducing Benchmarking			✓	✓
		Introducing Virtual Agent		✓	✓	✓
		Enabling Out-of-the-Box (OOTB) Knowledge Articles for Virtual Agent			✓	✓
		Configuring Solutions	Up to One (1)	Up to Two (2)	Up to Five (5)	Up to Ten (10)
	Configuration Management Database	Creating Configuration Item (CI)	Up to Two (2)	Up to Four (4)	Up to Six (6)	Up to Ten (10)
		Setting Up CI Field Dependency	✓	✓	✓	✓
		Introducing Exporting CIs		✓	✓	✓
	Platform	Creating Custom Forms With the Following: • Up to Three (3) Fields • Up to Two (2) Rules		Up to Two (2)	Up to Four (4)	Up to Six (6)
		Introducing Key SolarWinds Service Desk Settings	✓	✓	✓	✓
		Introducing Email Dropbox® Settings	✓	✓	✓	✓
		Assisting With Setting Up Email Dropbox		✓	✓	✓
		Introducing Notifications and Customized Email Templates	✓	✓	✓	✓
Observability and Alerts	IT Asset Management	Installing Discovery Agent	✓	✓	✓	✓
		Introducing Mobile Device Tracking	✓	✓	✓	✓
		Introducing Other Assets	✓	✓	✓	✓
		Introducing Contract Management		✓	✓	✓
		Introducing License Compliance		✓	✓	✓
		Introducing Risk Management		✓	✓	✓
		Introducing Purchase Order Management	✓	✓	✓	✓
	CMDB	Setting up Network Discovery		Up to One (1)	Up to Two (2)	Up to Four (4)
	Platform	Setting Up Dashboards With Up to Five (5) Widgets	Up to One (1)	Up to Two (2)	Up to Four (4)	Up to Six (6)
		Providing Information on Useful Portal Customization	✓	✓	✓	✓

CATEGORY	ACTIVITIES		DEPLOYMENT SERVICES LITE 5-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 2 75-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 3 125-HOUR LIMIT
		Providing Information for Export Reports or Views		✓	✓	✓
		Introducing Reports	✓	✓	✓	✓
		Scheduling Reports		✓	✓	✓
	Security	Introducing Audit		✓	✓	✓
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 Hand-Off Call 					

* For issues post-ESM migration, a support ticket will have to be raised from SolarWinds Customer Portal.



3. SolarWinds Service Desk – Premier

CATEGORY	ACTIVITIES		DEPLOYMENT SERVICES LITE 5-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 2 75-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 3 125-HOUR LIMIT
Introduction	<ul style="list-style-type: none"> Welcome Call Deployment Services Overview Project Status Tracking Customer Environment/Requirements Prerequisites Risk/Issues Check-In Calls Onboarding Sessions 					
Platform Planning	Duration		Up to 2 Hours	Up to 4 Hours	Up to 8 Hours	Up to 8 Hours
	Use Case Review		Up to Two (2)	Up to Three (3)	Up to Five (5)	Up to Five (5)
	Deployment Project Plan		✓	✓	✓	✓
Platform Setup	Security	Reviewing Single Sign-On Documentation	✓	✓	✓	✓
		Providing Guidance on Setting Up SSO Using One of the Supported Methods		✓	✓	✓
	Roles	Setting Up Roles and Permissions	Up to One (1)	Up to Three (3)	Up to Five (5)	Up to Ten (10)
	Platform	Introducing Domain Management		✓	✓	✓
		Introducing Enterprise Service Management (ESM) Software	✓	✓	✓	✓
		Communicating the Post-ESM Migration Impact	✓	✓	✓	✓
		Activating ESM	✓	✓	✓	✓
		Adding Service Providers		One (1)	Up to Two (2)	Up to Three (3)
		Introducing Differences Between Normal and ESM Settings		✓	✓	✓
		Conducting ESM Acceptance Test *	✓	✓	✓	✓
		Setting Up Sites and Departments	✓	✓	✓	✓
		Reviewing User Provisioning Documentation	✓	✓	✓	✓
		Setting Up Business Hours	✓	✓	✓	✓
		Setting Up Categories and Subcategories	✓	✓	✓	✓
		Setting Up Groups and Queues	✓	✓	✓	✓
		Introducing Custom States	✓	✓	✓	✓
		Introducing Integration With SolarWinds Observability Self-Hosted	✓	✓	✓	✓
		Scheduling Data Backup		✓	✓	✓
		Introducing the Microsoft® Power BI Connector				✓
	Service Management	Branding and Setting Up Service Portal		✓	✓	✓
Platform Configuration	Service Management	Introducing Incident Management	✓	✓	✓	✓
		Introducing Satisfaction Surveys	✓	✓	✓	✓
		Introducing Service Catalog	✓	✓	✓	✓
		Introducing Dynamic Approvers			✓	✓
		Creating a Standalone Service Catalog		✓	✓	✓
		Introducing Process Integration With Other Products				✓
		Introducing Problem Management	✓	✓	✓	✓
		Introducing Release Management	✓	✓	✓	✓



CATEGORY	ACTIVITIES		DEPLOYMENT SERVICES LITE 5-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 2 75-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 3 125-HOUR LIMIT
		Introducing Service Level Agreements	✓	✓	✓	✓
		Create Service Level Agreements	Up to One (1)	Up to One (1)	Up to Ten (10)	Up to Fifteen (15)
		Introducing Change Management	✓	✓	✓	✓
		Introducing Change Catalog		✓	✓	✓
		Defining Change Plans		Up to One (1)	Up to Two (2)	Up to Three (3)
		Introducing Response Templates		✓	✓	✓
		Creating Response Templates		Up to One (1)	Up to Two (2)	Up to Five (10)
		Introducing My Tasks and Approvals	✓	✓	✓	✓
		Setting Up Automation Rules		Up to Five (5)	Up to Ten (10)	Up to Fifteen (15)
		Introducing Benchmarking			✓	✓
		Introducing Virtual Agent		✓	✓	✓
		Enabling Out-of-the-Box (OOTB) Knowledge Articles for Virtual Agent – Premier			✓	✓
		Introducing Runbooks			✓	✓
		Configuring Solutions	Up to One (1)	Up to One (1)	Up to Five (5)	Up to Ten (10)
	SolarWinds AI (US, EU & AU Data Center Only)	Introducing Artificial Intelligence (AI) Case Summary	✓	✓	✓	✓
		Introducing AI-Suggested Responses	✓	✓	✓	✓
		Introducing AI-Generated Runbooks	✓	✓	✓	✓
		Introducing Data Masking	✓	✓	✓	✓
		Introducing Change of Workflow Process Step Type				✓
	Configuration Management Database	Creating Configuration Item (CI)	Up to One (1)	Up to Two (2)	Up to Six (6)	Up to Ten (10)
		Setting Up CI Field Dependency	✓	✓	✓	✓
		Introducing Automatic Dependency Mapping With SolarWinds Platform – Premier		✓	✓	✓
		Introducing Exporting CIs		✓	✓	✓
	Platform	Creating Custom Forms With the Following: • Up to Three (3) Fields • Up to Two (2) Rules		Up to Two (2)	Up to Four (4)	Up to Six (6)
		Introducing Key SolarWinds Service Desk Settings	✓	✓	✓	✓
		Introducing Email Dropbox® Settings	✓	✓	✓	✓
		Assisting With Setting Up Email Dropbox®		✓	✓	✓
		Introducing Notifications and Customized Email Templates		✓	✓	✓
Observability and Alerts	IT Asset Management	Teaching the Difference in the Data Collected Between Different Modes	✓	✓	✓	✓
		Installing Up to Ten (10) Discovery Agents	✓	✓	✓	✓
		Installing One (1) Discovery Scanner and Performing One (1) scan			✓	✓
		Introducing Mobile Device Tracking	✓	✓	✓	✓
		Introducing Other Assets	✓	✓	✓	✓
		Introducing the Procurement Module	✓	✓	✓	✓
		Introducing Contract Management		✓	✓	✓
		Introducing Purchase Order Management		✓	✓	✓



CATEGORY	ACTIVITIES		DEPLOYMENT SERVICES LITE 5-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 2 75-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 3 125-HOUR LIMIT
		Introducing Vendors		✓	✓	✓
		Introducing Reconcile			✓	✓
		Introducing Compliance		✓	✓	✓
		Introducing Risk Management		✓	✓	✓
	Configuration Management Database (CMDB)	Setting Up Network Discovery		Up to One (1)	Up to Two (2)	Up to Four (4)
		Introducing Visual Map			✓	✓
	Platform	Setting Up Dashboards With Up to Five (5) Widgets	Up to One (1)	Up to Two (2)	Up to Four (4)	Up to Six (6)
		Providing Information on Useful Portal Customization	✓	✓	✓	✓
		Providing Information on Export Reports or Views		✓	✓	✓
		Introducing Reports	✓	✓	✓	✓
		Scheduling Reports		✓	✓	✓
	Security	Introducing Audit		✓	✓	✓
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 Hand-Off Call 					

* For issues post-ESM migration, a support ticket will have to be raised from SolarWinds Customer Portal.

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 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.



*For additional information, please contact SolarWinds at [866.530.8100](tel:866.530.8100) or email sales@solarwinds.com.
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