eBook

SolarWinds Deployment Services

Network 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 Network Management products:

- Network Performance Manager (NPM)
- Network Configuration Manager (NCM)
- Network Traffic Manager (NTA)
- IP Address Manager (IPAM)
- Log Analyzer (LA)

DEPLOYMENT SERVICES PROGRAM

	SELF-LED	DS LITE (5 HRS.)	DS1 (30 HRS.)	DS2 (75 HRS.)	DS3 (125 HRS.)
Network Performance Monitor (NPM)	✔		✔		
Network Configuration Manager (NCM)	✔		✔		
Network Traffic Analyzer (NTA)	✔		✔		
IP Address Manager (IPAM)	✔		✔		
Log Analyzer (LA)	✔		✔		

* Scalability licenses are purchased separately

DEPLOYMENT SERVICES

We'll provide project plans and videos, a best practices approach during setup, and guides for getting started. We'll also 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 resource 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. Network Performance Monitor (NPM)

CATEGORY	ACTIVITIES			DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
Introduction	• Welcome Call • Deployment Service Overview • Tracking of Project Status • 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 Main Polling Engine		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 NPM Settings			✔
	Provide OIDs required by Hardware Health on Network Devices			✔
Observability and Alerts	**Duration**			**Up to 14 Hours**
	Create and run Network Discoveries with **Up to Twenty (20)** Devices each			Up to Five (5)
	Introduce Orion® Agents			✔
	Add Nodes Manually (including Orion Agents) Agent dependent: - LA (Optional) - SAM (Optional) - SCM (Required for file/registry/PowerShell monitoring)			Up to Ten (10)
	Add Virtual Servers (includes Hyper-V/Nutanix/VMWare)			Up to Two (2)
	Add Cloud Infrastructure			Up to One (1)
	Introduce Custom Properties			✔
	Create Custom Properties			Up to Five (5)

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 Ten (10)
	Introduce Dependencies	✔
	Create Dependencies with entities either **1. Up to One (1)** Dynamic; OR **2. Up to Three (3)** Static	Up to Two (2)
	Introduce Alerts and Reports	✔
	Create Alerts using **Up to Five (5)** built-in fields each	Up to Six (6)
	Create Reports using **Up to Five (5)** built-in fields each	Up to Five (5)
	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 Three (3)
	Introduce Maps and Topology	✔
	Create Maps with **Up to Five (5)** entities each	Up to Two (2)
	Introduce NetPath™	✔
	Create NetPath™	Up to Two (2)
	Introduce UCS Poller	✔
	Set up UCS Poller	Up to One (1)
	Introduce Hardware Health for Network Devices	✔
	Introduce Network Insights	✔
	Introduce Universal Device Poller (UnDP)	✔
	Create Universal Device Poller (UnDP)	Up to Three (3)
	Introduce Wireless Polling and Wireless Heatmap	✔
	Create Wireless Heat Map	Up to One (1)
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 Succes Manager (CSM) Hand-Off Call	

2. NetFlow Traffic Analyzer (NTA)

CATEGORY	ACTIVITIES			DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
Introduction	• Welcome Call • Deployment Service Overview • Tracking of Project Status • 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 Main Polling Engine		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 NPM Settings			✔
	Provide OIDs required by Hardware Health on Network Devices			✔
	Provide device setting to send NetFlow			✔
	Highlight important NTA Settings			✔
Observability and Alerts	**Duration**			**Up to 14 Hours**
	Create and run Network Discoveries with **Up to Twenty (20)** Devices each			Up to Five (5)
	Introduce Orion® Agents			✔
	Add Nodes Manually (including Orion Agents) Agent dependent: - LA (Optional) - SAM (Optional) - SCM (Required for file/registry/PowerShell monitoring)			Up to Ten (10)
	Add Virtual Servers (includes Hyper-V/Nutanix/VMWare)			Up to Two (2)
	Introduce Custom Properties			✔
	Create Custom Properties			Up to Five (5)

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 Ten (10)
	Introduce Dependencies	✓
	Create Dependencies with entities either **1. Up to One (1)** Dynamic; OR **2. Up to Three (3)** Static	Up to Two (2)
	Introduce Alerts and Reports	✓
	Create Alerts using **Up to Five (5)** built-in fields each	Up to Six (6)
	Create Reports using **Up to Five (5)** built-in fields each	Up to Five (5)
	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 Three (3)
	Introduce Maps and Topology	✓
	Create Maps with **Up to Five (5)** entities each	Up to Two (2)
	Introduce NetPath™	✓
	Create NetPath™	Up to One (1)
	Introduce UCS Poller	✓
	Set up UCS Poller	Up to One (1)
	Introduce Hardware Health for Network Devices	✓
	Introduce Network Insights	✓
	Introduce Universal Device Poller (UnDP)	✓
	Create Universal Device Poller (UnDP)	Up to Two (2)
	Introduce Wireless Polling and Wireless Heatmap	✓
	Introduce NTA	✓
	Provide NTA flow requirements	✓
	Provide information to set up NBAR on Cisco devices	Up to Two (2)
	Provide information to set up VMWare support on NTA	Up to Two (2)
	Introduce NTA Resources and Widgets	✓
	Introduce Flow Navigator and Quick Alerts	✓
	Introduce NTA Alerts and Reports	✓
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 Succes Manager (CSM) Hand-Off Call	

3. Network Configuration Manager (NCM)

CATEGORY	ACTIVITIES			DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
Introduction	• Welcome Call • Deployment Service Overview • Tracking Project Status • 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 Main Polling Engine		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			✓
	Introduce User Role Delegation			✓
	Highlight important NCM Settings			✓
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)

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 NCM	✔
	Introduce Device Templates	✔
	Set up and run device configuration backup	Up to Two (2)
	Set up NCM Jobs	Up to Two (2)
	Introduce Config Change Templates	✔
	Introduce Firmware Upgrades	✔
	Introduce Firmware Vulnerability Data	✔
	Introduce Compliance Reports	✔
	Create Compliance Reports with **Up to One (1)** Policy and **Up to Three (3)** Rules	Up to Five (5)
	Introduce Real-time Config Change Detection	✔
	Set up Real-time Config Change Detection	Up to Two (2)
	Introduce Approval System for configuration changes	✔
	Introduce NCM Alerts and Reports	✔
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 Succes Manager (CSM) Hand-Off Call	

4. IP Address Manager (IPAM)

CATEGORY	ACTIVITIES			DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
Introduction	• Welcome Call • Deployment Service Overview • Tracking Project Status • 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 Main Polling Engine		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			✔
	Introduce User Role Delegation			✔
	Introduce permissions for managing DNS server			✔
	Introduce permissions for managing DHCP server			✔
	Highlight important IPAM Settings			✔
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)
	Add Cloud Infrastructure			✔
	Introduce Custom Properties			✔
	Create Custom Properties			Up to Three (3)

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 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 Manage Subnet and IP Address Page	✓
	Create Subnet/Supernet	Up to Two (2)
	Manual IP Address Discoveries/ Imports	Up to Two (2)
	Introduce Neighbor Scanning	Up to Two (2)
	Introduce IP Address Request	✓
	Introduce DHCP/DNS server management	✓
	Add DHCP server	Up to One (1)
	Create DHCP scope	Up to One (1)
	Manage DHCP server	Up to One (1)
	Add DNS server	Up to One (1)
	Manage DNS scope	Up to One (1)
	Introduce IP Conflict	✓
	Introduce IPAM Alerts and Reports	✓
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 Succes Manager (CSM) Hand-Off Call	

5. Log Analyzer (LA)

CATEGORY	ACTIVITIES			DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
Introduction	• Welcome Call • Deployment Service Overview • Tracking Project Status • 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 Main Polling Engine		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 LA Settings			✔
	Provide required privileges and permissions			✔
	Provide device setting to send logs			✔
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)
	Add Cloud Infrastructure			✔
	Introduce Custom Properties			✔

CATEGORY	ACTIVITIES	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
	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 key features of LA	✓
	Introduce Syslog/Traps/Windows Event Filter	✓
	Set up Windows even collection via Orion Agent	Up to One (1)
	Create Rule to drop unwanted messages	Up to One (1)
	Introduce LA Alerts	✓
	Create LA Alerts	Up to Three (3)
	Review unlicensed and unmonitored log source reports	✓
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 Succes 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.