



eBook

SolarWinds Deployment Services

IT Service Management (ITSM)
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 Service Management products

- SolarWinds® Service Desk (SWSD)

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 (SWSD) – Essentials	✓	✓			
• SolarWinds Service Desk (SWSD) – Advanced	✓	✓	✓	✓	✓
• SolarWinds Service Desk (SWSD) – Premier	✓	✓	✓	✓	✓

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	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Export Report and Cls		✓		✓	✓	✓		✓	✓	✓
Introduce the Power BI Connector				✓	✓	✓		✓	✓	✓
Domain Management				✓	✓	✓		✓	✓	✓
CMDB Network Discovery				✓	✓	✓		✓		
Integrate with the Orion® Platform			✓	✓	✓	✓	✓	✓	✓	✓
Introduce Process Integration with Other Tools						✓				✓
Introduce AI Operations							✓	✓	✓	✓

Deployment Service Recommendations

- DS Lite introduces the fundamentals of SolarWinds Service Desk capabilities, focusing on providing information through Success Center documentation and knowledge-based articles with limited emphasis on implementation. It is great for small-size setups with limited needs for advanced features.
- DS 1 is the most popular option, suitable for standard Service Desk implementations, general use cases, and workflow.
- DS 2 is designed for advanced or premier subscription functionalities and requires the following.
 - Import Service Desk with Power BI for analytics
 - Domain Management for IT infrastructure
 - CMDB (Configuration Management Database) Network Discovery for asset and network mapping
- DS 3 offers comprehensive coverage, integrating advanced Service Desk capabilities and extensive process integration with other tools. It is recommended for large setups or organizations that need full-scale Service Desk capabilities, process integrations, and robust advanced features.



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 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 help you reach the proper technical support resource to best address the issue.



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 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 partner success manager will reach out to schedule an introductory call in which you'll meet your partner success manager, go over the program, and schedule your ongoing deployment sessions.

SolarWinds Platform Training — We'll familiarize you with SolarWinds® Service Desk.



1. SolarWinds Service Desk (SWSD) – 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 Service Overview Tracking of Project Status 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	Documentation Review of Single Sign-On	✓	✓
	Roles	Set up Roles and Permissions	Up To Five (5)	Up To Ten (10)
	Platform	Set up Sites and Departments	✓	✓
		Documentation Review of User Provisioning	✓	✓
		Set up Business Hours	✓	✓
		Set up Categories and Subcategories	✓	✓
		Set up Groups and Queues	✓	✓
		Introduce Custom States	✓	✓
		Integrate with SolarWinds Platform	✓	✓
Platform Configuration	Service Management	Introduce Incident Management	✓	✓
		Introduce Satisfaction Surveys	✓	✓
		Introduce Service Catalog	✓	✓
		Introduce Problem Management	✓	✓
		Introduce Release Management	✓	✓
		Introduce Service Level Agreements	✓	✓
		Create Service Level Agreements	Up To One (1)	Up To Five (5)
		Introduce Change Management	✓	✓
		Configure Solutions	Up To One (1)	Up To Five (5)
	Configuration Management Database (CMDB)	Create Configuration Item (CI)	Up To Two (2)	Up To Six (6)
		Setup CI Field Dependency	✓	✓
		Introduce Exporting CIs		✓
	Platform	Introduce Key Service Desk Settings	✓	✓
		Introduce Email Dropbox® Settings	✓	✓
Observability and Alerts	IT Asset Management (ITAM)	Install Discovery Agent	✓	✓
		Introduce Tracking of Mobile Devices	✓	✓
		Introduce Other Assets	✓	✓
		Purchase Order Management	Up To One (1)	Up To Four (4)
	Platform	Set up Dashboards	✓	✓

CATEGORY	ACTIVITIES		DEPLOYMENT SERVICES LITE 5-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
		Provide Information on Useful Portal Customization	✓	✓
		Provide Information to Export Reports or Views		✓
		Introduce 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 			



2. SolarWinds Service Desk (SWSD) – 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 Overview Tracking of Project Status 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	Documentation Review of Single Sign-on	✓	✓	✓	✓
		Domain Management		✓	✓	✓
	Roles	Set up Roles and Permissions	Up To Five (5)	Up To Seven (7)	Up To Ten (10)	Up To Ten (10)
	Platform	Set up Sites and Departments	✓	✓	✓	✓
		Documentation Review of User Provisioning	✓	✓	✓	✓
		Set up Business Hours	✓	✓	✓	✓
		Set up Categories and Subcategories	✓	✓	✓	✓
		Set up Groups and Queues	✓	✓	✓	✓
		Introduce Custom States	✓	✓	✓	✓
		Introduce integration with the SolarWinds Platform	✓	✓	✓	✓
		Schedule Data Backup		✓	✓	✓
		Introduce the Power BI Connector		✓	✓	✓
	Service Management	Service Portal Branding and Setup		✓	✓	✓
Platform Configuration	Service Management	Introduce Incident Management	✓	✓	✓	✓
		Introduce Satisfaction Surveys	✓	✓	✓	✓
		Introduce Service Catalog	✓	✓	✓	✓
		Introduce Dynamic Approvers			✓	✓
		Provide Guidance to Create a Standalone Service Catalog		Up To One (1)	Up To Five (5)	Up To Ten (10)
		Introduce Process Integration with Other Products				✓
		Introduce Problem Management	✓	✓	✓	✓
		Introduce Release Management	✓	✓	✓	✓
		Introduce Service Level Agreements	✓	✓	✓	✓
		Create Service Level Agreements	Up To One (1)	Up To Two (2)	Up To Five (5)	Up To Ten (10)
		Introduce Change Management	✓	✓	✓	✓
		Introduce Change Catalog		✓	✓	✓
		Define Change Plans		Up To One (1)	Up To Two (2)	Up To Three (3)
		Introduce Response Templates		✓	✓	✓

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
		Create Response Templates		Up To One (1)	Up To Two (2)	Up To Five (10)
		Introduce My Tasks and Approvals		✓	✓	✓
		Set up Automation Rules		Up To Two (2)	Up To Five (5)	Up To Ten (10)
		Introduce Benchmarking			✓	✓
		Introduce Virtual Agent		✓	✓	✓
		Enable OOTB Knowledge Articles for Virtual Agent			✓	✓
		Configure Solutions	Up To One (1)	Up To Two (2)	Up To Five (5)	Up To Ten (10)
	Configuration Management Database (CMDB)	Create Configuration Item (CI)	Up To Two (2)	Up To Four (4)	Up To Six (6)	Up To Ten (10)
		Setup CI Field Dependency	✓	✓	✓	✓
		Introduce Exporting CIs		✓	✓	✓
	Platform	Create Custom Forms with the Following: <ul style="list-style-type: none"> Up to Three (3) Fields Up to Two (2) Rules 		Up To Two (2)	Up To Four (4)	Up To Six (6)
		Introduce Key Service Desk Settings	✓	✓	✓	✓
		Introduce Email Dropbox® Settings	✓	✓	✓	✓
		Introduce Notifications and Customized Email Templates	✓	✓	✓	✓
Observability and Alerts	IT Asset Management (ITAM)	Install Discovery Agent	✓	✓	✓	✓
		Introduce Tracking of Mobile Devices	✓	✓	✓	✓
		Introduce Other Assets	✓	✓	✓	✓
		Introduce Contract Management		✓	✓	✓
		Introduce License Compliance		✓	✓	✓
		Introduce Risk Management		✓	✓	✓
		Introduce Purchase Order Management	✓	✓	✓	✓
	Configuration Management Database (CMDB)	Set up Network Discovery		Up To One (1)	Up To Two (2)	Up To Four (4)
	Platform	Set up Dashboards	✓	✓	✓	✓
		Provide Information on Useful Portal Customization	✓	✓	✓	✓
		Provide Information to Export Reports or Views		✓	✓	✓
		Introduce Reports	✓	✓	✓	✓
		Schedule Reports		✓	✓	✓
	Security	Introduce Audit		✓	✓	✓
Platform Training	<ul style="list-style-type: none"> Working With Support THWACK® SolarWinds Academy Virtual Classrooms Online Best Practices Articles General Overview Resources 					



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
Journey Success	<ul style="list-style-type: none">• Deployment Summary• Customer Survey• Optimization• Opportunities• Customer Success Manager (CSM) Hand-Off Call				



3. SolarWinds Service Desk (SWSD) – 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 Service Overview Tracking of Project Status 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	Documentation Review of Single Sign-on	✓	✓	✓	✓
		Domain Management		✓	✓	✓
	Roles	Set up Roles and Permissions	Up To Five (5)	Up To Five (5)	Up To Ten (10)	Up To Ten (10)
		Set up Sites and Departments	✓	✓	✓	✓
		Documentation Review of User Provisioning	✓	✓	✓	✓
		Set up Business Hours	✓	✓	✓	✓
		Set up Categories and Subcategories	✓	✓	✓	✓
		Set up Groups and Queues	✓	✓	✓	✓
		Introduce Custom States	✓	✓	✓	✓
		Introduce Integration with the SolarWinds Platform	✓	✓	✓	✓
		Schedule Data Backup		✓	✓	✓
		Introduce the Power BI Connector		✓	✓	✓
	Service Management	Service Portal Branding and Setup		✓	✓	✓
Platform Configuration	Service Management	Introduce Incident Management	✓	✓	✓	✓
		Introduce Satisfaction Surveys	✓	✓	✓	✓
		Introduce Service Catalog	✓	✓	✓	✓
		Introduce Dynamic Approvers			✓	✓
		Creation of a Standalone Service Catalog		✓	✓	✓
		Introduce Process Integration with Other Products				✓
		Introduce Problem Management	✓	✓	✓	✓
		Introduce Release Management	✓	✓	✓	✓
		Introduce Service-Level Agreements	✓	✓	✓	✓
		Create Service-Level Agreements	Up To One (1)	Up To One (1)	Up To Ten (10)	Up To Fifteen (15)
		Introduce Change Management	✓	✓	✓	✓
		Introduce Change Catalog		✓	✓	✓
		Define Change Plans		Up To One (1)	Up To Two (2)	Up To Three (3)
		Introduce Response Templates		✓	✓	✓
		Create Response Templates		Up To One (1)	Up To Two (2)	Up To Five (10)

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
		Introduce My Tasks and Approvals		✓	✓	✓
		Set up Automation Rules		Up To Five (5)	Up To Ten (10)	Up To Fifteen (15)
		Introduce Benchmarking			✓	✓
		Introduce Virtual Agent		✓	✓	✓
		Enable OOTB Knowledge Articles for Virtual Agent – Premier			✓	✓
		Introduction Runbooks			✓	✓
		Configure Solutions	Up To One (1)	Up To One (1)	Up To Five (5)	Up To Ten (10)
	SolarWinds AI (US and EU data center only)	Introduce AI Case Summary	✓	✓	✓	✓
		Introduce AI-Suggested Responses	✓	✓	✓	✓
		Introduce AI-Generated Runbooks	✓	✓	✓	✓
		Introduce Data Masking	✓	✓	✓	✓
		Introduce Change of Workflow Process Step Type				✓
	Configuration Management Database (CMDB)	Create Configuration Item (CI)	Up To One (1)	Up To Two (2)	Up To Six (6)	Up To Ten (10)
		Setup CI Field Dependency	✓	✓	✓	✓
		Introduce Automatic Dependency Mapping with SolarWinds Platform - Premier		✓	✓	✓
		Introduce Exporting CIs		✓	✓	✓
	Platform	Create Custom Forms with the Following: <ul style="list-style-type: none"> Up to Three (3) Fields Up to Two (2) Rules 		Up To Two (2)	Up To Four (4)	Up To Six (6)
		Introduce Key Service Desk Settings	✓	✓	✓	✓
		Introduce Email Dropbox® Settings	✓	✓	✓	✓
		Introduce Notifications and Customized Email Templates		✓	✓	✓
Observability and Alerts	IT Asset Management (ITAM)	Install Discovery Agent	✓	✓	✓	✓
		Introduce Tracking of Mobile Devices	✓	✓	✓	✓
		Introduce Other Assets	✓	✓	✓	✓
		Introduce Contract Management		✓	✓	✓
		Introduce License Compliance		✓	✓	✓
		Introduce Risk Management		✓	✓	✓
		Introduce Purchase Order Management	✓	✓	✓	✓
	Configuration Management Database (CMDB)	Set up Network Discovery		Up To One (1)	Up To Two (2)	Up To Four (4)
		Introduce Visual Map			✓	✓
	Platform	Setting up Dashboards	✓	✓	✓	✓
		Provide Information on Useful Portal Customization	✓	✓	✓	✓
		Provide Information to Export Reports or Views		✓	✓	✓

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
		Introduce Reports	✓	✓	✓	✓
		Schedule Reports		✓	✓	✓
	Security	Introduce 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 (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 or email sales@solarwinds.com.
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