



SolarWinds Deployment Services

Incident Response (Squadcast) Onboarding Field Guide

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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:

- SolarWinds® Squadcast

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 Incident Response (Squadcast) – Pro	✓	✓			
SolarWinds Incident Response (Squadcast) – Premium	✓	✓	✓	✓	✓
SolarWinds Incident Response (Squadcast) – Enterprise	✓	✓	✓	✓	✓

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

SolarWinds Incident Response Subscription Model

The SolarWinds Incident Response subscription model has three tiers: Pro, Premium, and Enterprise. [Learn More](#)

Key Differences Between the Deployment Services Options

ACTIVITIES		Pro		Premium				Enterprise			
		DS LITE	DS1	DS LITE	DS1	DS2	DS3	DS LITE	DS1	DS2	DS3
Introduce Fundamental Platform Setup		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Introduce Basic On-Call Management		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Introduce Advanced On-Call Management			✓	✓	✓	✓	✓	✓	✓	✓	✓
Introduce and Set Up Dedupe Keys, Tagging, and Suppression Rules			✓		✓	✓	✓		✓	✓	✓
Introduce and Set Up Intelligent Alert Grouping and Auto Pause Transient Alerts										✓	✓
Introduce and Set Up the Custom Content Template						✓	✓			✓	✓
Integrations	Introduce Alert Source Integration	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Set Up Alert Source Integration		Up to One (1)			Up to Five (5)	Up to Ten (10)			Up to Five (5)	Up to Ten (10)
	Introduce Integrations With: Slack, Teams, and Google Chat		✓		✓	✓	✓		✓	✓	✓
	Introduce Integrations With: JIRA and Webhooks				✓	✓	✓			✓	✓
	Introduce Integration With SolarWinds Observability		✓		✓	✓	✓			✓	✓
	Introduce Integrations With: ServiceNow, Custom Webhooks for ITSM, and Other Tools						✓				✓
Site Reliability Engineering Features	Introduce Basic Features: Status Page, Webforms, Runbooks, and Postmortem				✓	✓	✓		✓	✓	✓
	Introduce Advanced Features: Service Level Objective (SLO) Tracker					✓	✓			✓	✓
	Introduce Advanced Features: Live Call Routing and Workflow									✓	✓
	Introduce Setup Features					Up to One (1)	Up to Two (2)			Up to One (1)	Up to Two (2)
	Introduce Workflow Best Practices										✓
Reporting and Analytics			✓		✓	✓	✓		✓	✓	✓
Migration							✓				✓

Deployment Service Recommendations

SolarWinds Squadcast

- Deployment Services Lite (DS Lite) delivers the fundamentals of SolarWinds Incident Response with best practices and minimal setup. It includes basic configuration, on-call management, and simple integrations. It is ideal for small teams or quick initial deployments.
- Deployment Services Level 1 (DS1) is the most popular option, balancing setup depth and efficiency. It adds integrations, reporting, and one alert source setup. It is ideal for standard deployments and teams starting to expand automation and site reliability engineering (SRE) features.
- Deployment Services Level 2 (DS2) supports advanced automations, workflows, and integrations, including multiple alert sources, JIRA/webhooks, and SRE features, such as service level objective (SLO) Tracker and live call routing. Ideal for mature teams scaling Incident Response and reliability practices.
- Deployment Services Level 3 (DS3) supports advanced automations, workflows, and integrations, including multiple alert sources, JIRA/webhooks, and SRE features, such as SLO Tracker and live call routing. It is ideal for mature teams scaling Incident Response and reliability practices.



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 find 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 achievable goals 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 schedule your ongoing deployment sessions

SolarWinds Platform Training — We'll familiarize you with SolarWinds Incident Response



1. SolarWinds Incident Response (Squadcast) – Pro

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 Risks/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	Account Setup and Onboarding	Create the Account Owner Profile	✓	✓
		Complete Teams and Squad Setup		✓
		Provide Single Sign-On Guidance	✓	✓
		Add Users (Manual/Comma-Separated Values; General Help)	✓	✓
Platform Configuration	On-Call Management	Introduce Schedules	✓	✓
		Introduce Different Schedule Use Cases	✓	✓
		Introduce Escalation Policies	✓	✓
		Introduce Different Escalation Use Cases	✓	✓
		Create Schedules	Up to One (1)	Up to Two (2)
		Create Escalation Policies	Up to One (1)	Up to Two (2)
		Introduce Services	✓	✓
	Alert Routing, Noise Reduction, and Automation Rules	Introduce Routing Rules		✓
		Introduce Dedupe Keys		✓
		Introduce Tagging		✓
		Introduce Suppression Rules		✓
		Set Up Dedupe Keys		Up to Two (2)
		Set Up Routing Rules		Up to Two (2)
		Set Up Tagging Rules		Up to Two (2)
		Set Up Suppression Rules		Up to Two (2)
	Integrations and Event Sources	Introduce Alert Source Integration	✓	✓
		Help Set Up Alert Source Integration		Up to One (1)
		Introduce Slack Integration		✓
		Introduce Teams Integration		✓
		Introduce Google Chat Integration		✓
		Introduce SolarWinds Observability Integration		✓
Observability and Alerts	Reports and Analytics	Introduce Mean Time to Acknowledge/Mean Time to Resolve Performance Report		✓
		Introduce Incident-Based Analytics		✓



CATEGORY	ACTIVITIES	DEPLOYMENT SERVICES LITE 5-HOUR LIMIT	DEPLOYMENT SERVICES LEVEL 1 30-HOUR LIMIT
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		



2. SolarWinds Incident Response (Squadcast) – Premium

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 Risks/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	Roles	Set Up Roles and Permissions	Up to One (1)	Up to Two (2)	Up to Five (5)	Up to Ten (10)
	Account Setup and Onboarding	Create the Account Owner Profile	✓	✓	✓	✓
		Complete Teams and Squad Setup		✓	✓	✓
		Provide Single Sign-On Guidance	✓	✓	✓	✓
		Add Users (Manual/Comma-Separated Values; General Help)	✓	✓	✓	✓
		Integrate With SolarWinds Platform	✓	✓	✓	✓
Platform Configuration	On-Call Management	Introduce Schedules	✓	✓	✓	✓
		Introduce Different Schedule Use Cases	✓	✓	✓	✓
		Introduce Escalation Policies	✓	✓	✓	✓
		Introduce Different Escalation Use Cases	✓	✓	✓	✓
		Create Schedules	Up to One (1)	Up to Two (2)	Up to Five (5)	Up to Ten (10)
		Create Escalation Policies	Up to One (1)	Up to Two (2)	Up to Five (5)	Up to Ten (10)
		Introduce Services	✓	✓	✓	✓
	Alert Routing, Noise Reduction, and Automation Rules	Introduce Routing Rules		✓	✓	✓
		Introduce Dedupe Keys		✓	✓	✓
		Introduce Tagging		✓	✓	✓
		Introduce Suppression Rules		✓	✓	✓
		Set Up Dedupe Keys		Up to Two (2)	Up to Five (5)	Up to Ten (10)
		Set Up Routing Rules		Up to Two (2)	Up to Five (5)	Up to Ten (10)
		Set Up Tagging Rules		Up to Two (2)	Up to Five (5)	Up to Ten (10)
		Set Up Suppression Rules		Up to Two (2)	Up to Five (5)	Up to Ten (10)
		Introduce Custom Content Templates			✓	✓
		Set Up Custom Content Templates			Up to Two (2)	Up to Five (5)
	Integrations and Event Sources	Introduce Alert Source Integration	✓	✓	✓	✓
		Help Set Up Alert Source Integration			Up to Five (5)	Up to Ten (10)
		Introduce Slack Integration		✓	✓	✓



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 Teams Integration	✓	✓	✓
			Introduce Google Chat Integration	✓	✓	✓
			Introduce JIRA Integration		✓	✓
			Introduce SolarWinds Observability Integration		✓	✓
			Introduce Outgoing Webhooks		✓	✓
			Introduce Custom Integrations Using Outgoing Webhooks for ITSM and Other Tools			✓
	Site Reliability Engineering Features	Status Page	Introduce Status Page	✓	✓	✓
			Set Up Status Page		Up to One (1)	Up to Two (2)
		Webforms	Introduce Webforms	✓	✓	✓
			Set Up Webforms		Up to One (1)	Up to Two (2)
		Runbooks	Introduce Runbooks	✓	✓	✓
			Set Up Runbooks		Up to One (1)	Up to Two (2)
		Service Level Objective (SLO) Tracker	Introduce SLO Tracker		✓	✓
			Set Up SLO Tracker		Up to One (1)	Up to Two (2)
		Postmortems	Introduce Postmortems	✓	✓	✓
Observability and Alerts	Reports and Analytics		Introduce Mean Time to Acknowledge/Mean Time to Resolve Performance Report	✓	✓	✓
			Introduce Incident-Based Analytics	✓	✓	✓
	Migration		Migrate From PagerDuty Using Migrator			✓
			Migrate From Opsgenie Using Migrator			✓
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 					



3. SolarWinds Incident Response (Squadcast) – Enterprise

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 Risks/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	Roles	Set Up Roles and Permissions	Up to One (1)	Up to Two (2)	Up to Five (5)	Up to Ten (10)
	Account Setup and Onboarding	Create the Account Owner Profile	✓	✓	✓	✓
		Complete Teams and Squad Setup			✓	✓
		Provide Single Sign-On Guidance	✓	✓	✓	✓
		Add Users (Manual/Comma-Separated Values; General Help)	✓	✓	✓	✓
		Integrate With SolarWinds Platform	✓	✓	✓	✓
Platform Configuration	On-Call Management	Introduce Schedules	✓	✓	✓	✓
		Introduce Different Schedule Use Cases	✓	✓	✓	✓
		Introduce Escalation Policies	✓	✓	✓	✓
		Introduce Different Escalation Use Cases	✓	✓	✓	✓
		Create Schedules	Up to One (1)	Up to Two (2)	Up to Five (5)	Up to Ten (10)
		Create Escalation Policies	Up to One (1)	Up to Two (2)	Up to Five (5)	Up to Ten (10)
		Introduce Services	✓	✓	✓	✓
	Alert Routing, Noise Reduction, and Automation Rules	Introduce Routing Rules		✓	✓	✓
		Introduce Dedupe Keys		✓	✓	✓
		Introduce Tagging		✓	✓	✓
		Introduce Suppression Rules		✓	✓	✓
		Set Up Dedupe Keys		Up to Two (2)	Up to Five (5)	Up to Ten (10)
		Set Up Routing Rules		Up to Two (2)	Up to Five (5)	Up to Ten (10)
		Set Up Tagging Rules		Up to Two (2)	Up to Five (5)	Up to Ten (10)
		Set Up Suppression Rules		Up to Two (2)	Up to Five (5)	Up to Ten (10)
		Introduce Intelligent Alert Grouping (IAG)			✓	✓
		Introduce Auto Pause Transient Alerts (APTA)			✓	✓
		Set Up IAG			Up to Ten (7)	Up to Ten (10)
		Set Up APTA			Up to Ten (7)	Up to Ten (10)
		Introduce Custom Content 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
			Set Up Custom Content Templates		Up to Two (2)	Up to Five (5)
			Introduce Global Event Rulesets	✓	✓	✓
			Set Up Global Event Rulesets		Up to Two (2)	Up to Five (5)
	Integrations and Event Sources		Introduce Alert Source Integration	✓	✓	✓
			Set Up Alert Source Integration		Up to Five (5)	Up to Ten (10)
			Introduce Slack Integration	✓	✓	✓
			Introduce Teams Integration	✓	✓	✓
			Introduce Google Chat Integration	✓	✓	✓
			Introduce JIRA Integration		✓	✓
			Introduce SolarWinds Observability Integration		✓	✓
			Introduce Outgoing Webhooks		✓	✓
			Introduce ServiceNow Integration			✓
			Introduce Custom Integrations Using Outgoing Webhooks for ITSM and Other Tools			✓
	Site Reliability Engineering Features	Status Page	Introduce Status Page	✓	✓	✓
			Set Up Status Page		Up to One (1)	Up to Two (2)
		Webforms	Introduce Webforms	✓	✓	✓
			Set Up Webforms		Up to One (1)	Up to Two (2)
		Live Call Routing	Introduce Live Call Routing (LCR)		✓	✓
			Set Up LCR		Up to One (1)	Up to Two (2)
		Runbooks	Introduce Runbooks	✓	✓	✓
			Set Up Runbooks		Up to One (1)	Up to Two (2)
		Service Level Objective (SLO) Tracker	Introduce SLO Tracker		✓	✓
			Set Up SLO Tracker		Up to One (1)	Up to Two (2)
		Workflows	Introduce Workflows		✓	✓
			Introduce Workflow Best Practices			✓
			Set Up Workflows		Up to One (1)	Up to Five (5)
		Postmortems	Introduce Postmortems	✓	✓	✓
			Set Up Postmortem Templates		Up to One (1)	Up to Two (2)
Observability and Alerts	Reports and Analytics		Introduce Mean Time to Acknowledge/Mean Time to Resolve Performance Report	✓	✓	✓
			Introduce Incident-Based Analytics	✓	✓	✓
	Migration		Migrate From PagerDuty Using Migrator			✓
			Migrate From Opsgenie Using Migrator			✓



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
Platform Training	<ul style="list-style-type: none">Working With SupportTHWACK®SolarWinds Academy™ Virtual ClassroomsOnline Best Practices ArticlesGeneral Overview Resources				
Journey Success	<ul style="list-style-type: none">Deployment SummaryCustomer SurveyOptimizationOpportunitiesCustomer 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—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. To locate an international reseller near you, visit [SolarWinds Partner Page](#).

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