Your Company Name

Installation Planning Guide

Date

Revision History

Date	Version	Author	Change

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Note: Text displayed in blue italics is included to provide guidance to the author and should be deleted before publishing the document.   In any table, select and delete any blue line text; then click Home→Styles and select "Table Text" to restore the cells to the default value.

1   Introduction

This document is an Installation Plan and Guide, which will be used to install the <Name of System, Version or Data>.

Note: Delete or indicate document sections that are not applicable.

1.1   Purpose

Provide information about the purpose of this installation guide, including information about the system, version, or data to be installed.

1.2   Objectives

Provide the business or technology objectives to be achieved with the installation. Identify any association to other plans or initiatives.

1.3   Key Stakeholders and Points of Contact

Provide a list of key stakeholders and key contacts in the event trouble shooting is necessary to resolve problems.

Name	Company or Department	Title	Phone	Email Address

Contacts

Name	Company or Department	Specialty, Area, or Role	Phone	Email Address

1.4   Referenced Documentation

Provide information about all documentation referenced in this document, e.g., number, title, version, and date.

Document Number	Version	Date	Document Name

2   Installation Information

2.1   System Overview

Provide an overview of the system, application, version, and data to be installed, e.g.,

- *Type of system*
- *System processes it is intended to support*
- *Interfaces*
- *Type of data maintained*
- *Operational sources.*

2.2   Installation Overview

Provide an overview of the planned installation. Include a description of the system structure and major components, e.g.,.

- *Specific components that will be installed.*
- *Installation phases and components in each phase..*
- *Hardware, software, and data affected (include charts, diagrams, and graphics).*

2.3   Scope

Provide the scope of the installation, i.e., areas and boundaries that are included and those that are not included in the installation.

2.4   Environment

Provide detailed information about the installation location and site, including its layout, access, system availability, and environment concerns. Include diagrams where applicable.

2.5 Installation Strategy

Describe the strategies to convert or install system hardware, software, and data.

- *Hardware Conversion or Installation Strategy: Includes the new hardware environment.*
- *Software Conversion or Installation Strategy. Includes the software strategy to be used.*
- *Data Conversion Strategy. Includes the strategy for data conversion, data quality assurance, and data conversion controls.*
- *Interfaces. Includes the new or affected interfaces. For a hardware platform conversion, e.g., mainframe to client/server, provide information about affected interfaces and their revisions.*
- *Data Quality Assurance and Control. Includes assurance for data quality before and after all data conversions, e.g., approach to data scrubbing and quality assessment of data before they are moved to the new or converted system.*

Strategy Topic	Description
Hardware	
Software	
Data Conversion Approach	
Interfaces	
Data Quality Assurance and Control	

2.6 Installation Risk Factors

Describe the major risk factors in the installation and strategies for their control or reduction, e.g.,

- *Technical performance of the installed system*
- *Installation and conversion schedule*
- *Costs*
- *Backup and recovery procedures.*

2.7 Security

Provide an overview of the system security features and security during the installation.

2.8   Installation Planning

Describe planning for the installation, including related issues, e.g.,

- *Project installation workload, performance, and capacity requirements can be handled adequately.*
- *Processing growth rate projection for current and future years has been validated.*
- *Missing features identified in the new hardware and software environment that were supported and used in the original environment / system.*
- *Strategies for reprogramming or redesigning system components not supported in the new hardware and software environment but were in the original system.*

2.9   Pre-Installation Plans and Requirements

Describe tasks that are separate from the installation activity but must be completed before initiation, development, or completion, e.g.,

- *System hardware installation changes to new computer or communications hardware.*
- *Implement changes to the computer operating system or operating system components, e.g., new LAN operating system or a new windowing system.*
- *Install other software, e.g., new database system.*

2.10   Installation Schedule

Provide installation schedule information. Include information about pre-installation tasks and major tasks for all hardware, software, and data conversions.

Activity	Performed By	Start Date	End Date	Comments

3   File Information

3.1   File Contents

Provide information about the contents of the files to be used during installation.

Directory	Description	Purpose or Comments
DbScripts	*XYZ_TABLES.sql* *XYZ_STORED_PROC.sql*	

3.2   Script File Breakdown

Provide information that defines the objects contained in each script (if applicable).

Script Name	Script Contents	Status (New/Alter/Delete)
XYZ_TABLES.sql	*BENEFITS_TAF* *SUBSCRIPTION*	*Alter* *Alter*
XYZ_STORED_PROC.sql	*spAddTreatmentReminder* *spAddTellAFriend*	*New* *Alter*

3.3   Assets

Provide information about the assets (e.g., web assets) that must be used during the installation (if applicable).

Item List	Page Names	Comments
XYZ website	*/benefits/prospectpoll.aspx*	
	/benefits_program/userpoll.aspx	
	/bin/XYZ.dll	
	/Controls/Component/Track.ascx	

4 Installation Instructions

4.1 Major Phases

Provide information about the major phases associated with the installation and the procedures associated with those phases.

- *Major Phase Name. List each Phase with a brief description. Include sub-phases required to perform the installation, data preparation, and testing.*
- *Procedures. Provide the procedural approach for each major phase.*

Phase	Procedure Description

4.2 Tasks and Procedures

Provide detailed instructional information for each task associated with the installation.

- *Task Name. List each task with a brief description. Include sub-tasks required to perform the installation, data preparation, and testing.*
- *Procedures. Provide the instructions and/or procedures for each task.*

Note: Repeat this table for each task as needed.

Step #	Task	Instructions / Procedures

4.3 Backup Procedures

Provide detailed backup procedures in the event of an emergency.

4.4 Rollback and Recovery Procedures

Provide detailed rollback and recovery procedures in the event of an emergency.

4.5 Change Control Procedures

Provide detailed change control procedures.

5 Installation Support

Describe the support necessary to implement the system.

5.1 Hardware Inventory

Provide hardware equipment information that will be used during the installation.

Equipment	Description

5.2 Software Inventory

Provide information about the software and databases required to support the installation, e.g.,

- *Automated conversion and installation tools-software translation tools for translating different computer languages, data storage formats, compiler release versions or databases.*
- *Automated testing tools for quality assurance and validation.*
- *CASE tools for capturing system design information and presenting it graphically.*
- *Commercial off-the-shelf software and software written specifically for the installation or conversion effort.*

Software	Description

5.3   Network Inventory

Provide network information that will be used during the installation.

Equipment or Software	Description

5.4   Facilities

Provide facilities information required during the installation period.

Facility	Location and Special Accommodations Needed

5.5   Materials

Provide materials information that will be used during the installation (if applicable).

Material	Description

5.6 Personnel

Provide personnel requirements, proposed staffing, and training for the installation.

Personnel Type or Skills	Names	Length of Time	Training Needed

6 Glossary

The following table includes a glossary of all terms and abbreviations used in the document.

Topic	Description

7   APPENDIX