

# Deployment Planning Template

## Chapter 1 – Infrastructure Considerations

Use this template to document any hardware infrastructure considerations that arise during the planning stage of your deployment.

Will your new equipment work within your current power infrastructure?			
Location	Power Availability	Power Requirements	
Will there be any high-performance or high-density situations that require more cooling?			
What are the network requirements of your new equipment?			
Location	Wired Links	Wireless Clients	Bandwidth

Will you be implementing any hardware security measures?		
Location Security	Physical Security	Theft Recovery
Comments / Reasoning:		

## Chapter 1 – Handling Logistics

Use this template to document any handling logistics that arise during the planning stage of your deployment.

What is the workflow plan from delivery to deployment?

For new computers, what will you do with the packaging materials?

Are there any special requirements for delivering the new computers to the users?

If a computer needs to be physically repaired or replaced what is the plan?

What level of service do you require for repairs? Will you carry spare parts or computers?

How do you plan to dispose of or recycle old computers?

Comments / Reasoning:

## Chapter 1 – Usage Management

Use this template to document any usage management policies and enforcement strategies that you define during the planning stage of your deployment.

Does your organization have up-to-date usage policies? If not, what are you waiting for?

How do you plan to distribute usage policies to your users?

How do you plan to enforce usage policies in your deployment?

Will you be using a directory service? If so, what configuration is necessary?

Who will have the following levels of access? Local accounts or network directory accounts?		
Administrator Account	Standard Account	Managed Account
How will home folders be managed?		
Network Accounts	Local / Standard Accounts	Backup Strategy
Synced External	Local / Managed Accounts	Mobile Accounts
Comments / Reasoning:		

## Chapter 2 - Deploying Individual Items

Use this template when documenting which items you will deploy via simple copy mechanisms and containers. Indicate the container or file format (also if forked) and whether these items reside on a central share point.

If there are any pre or post actions – please indicate.

Which items should be deployed individually?			
Source	Destination	Format	Share Point
		<input type="checkbox"/> File <input type="checkbox"/> Archive <input type="checkbox"/> DMG <input type="checkbox"/> Other	
Comments / Reasoning:			
Are any pre-deployment actions required?			
Are any post-deployment actions required?			

## Chapter 2 - Deploying With Disk Images

Use this template when documenting which items you will deploy inside disk images. Indicate the image types and whether these images reside on a central share point. If there are any pre or post actions – please indicate.

Which items should be deployed using Disk Images?			
Source	Destination	Format	Share Point
		<input type="checkbox"/> Compressed <input type="checkbox"/> Encrypted <input type="checkbox"/> Read Only <input type="checkbox"/> Internet-enabled <input type="checkbox"/> Other	
Comments / Reasoning:			
Are any pre-deployment actions required?			
Are any post-deployment actions required?			



### Chapter 3 - Deploying With Installation Packages

Use this template when documenting which installation packages you will deploy and via which method. Indicate the installer package format and whether they reside on a server share.

As part of your pre / post deployment actions, you may include a description of any scripts included in your installer package.

Which items should be deployed using installation packages?			
Payload	Destination	Format	Server Share
		<input type="checkbox"/> Bundle .pkg <input type="checkbox"/> Bundle .mpkg <input type="checkbox"/> Flat .pkg	
What deployment method will you use for installation packages?			
<input type="checkbox"/> Server Hosted / Manual Install <input type="checkbox"/> SSH <input type="checkbox"/> ARD			
Do you plan to use or integrate with any third-party package deployment solutions?			

Comments / Reasoning:

Are any pre-deployment actions or scripts required?

Are any post-deployment actions or scripts required?

## Chapter 4 - Creating Cloned System Images

Use this template when documenting the planning of any cloned system images you intend to create. Indicate any pre-imaging preparation steps; the client for your system image, and any additional installation packages, updates, or customizations included with the system image.

Cloned System Image Creation:		
Client Computer Info	Destination Systems	Location / Share Point
Hardware: OS Version: Media Used:		
What additional software should be installed on the client computer before imaging?		
What managed preferences need to be applied to the client computer before imaging?		

What custom configuration steps should be taken on the client computer before imaging?

What settings must be purged from the client system before you clone it?

When / how do you plan to update this cloned system image?

Comments / Reasoning:

## Chapter 4 - Creating Modular System Images

Use this template when documenting the planning of any modular system images you intend to create. Indicate any pre-imaging preparation steps; the base Mac OS X build version, and any additional installation packages, updates, or customizations included with the system image.

Modular System Image Creation:		
Base System Info	Destination Systems	Location / Share Point
OS Version: Media Used:		
What Apple software / update installations do you need to collect?		
What additional software installation packages do you need to collect / create?		

What custom configurations need to be built into installation packages?

What additional "special case" modular systems do you plan to build?

When/how do you plan to update this modular system image?

Comments / Reasoning:

## Chapter 4 - Deploying System Images

Use this template when documenting your system image deployment strategy.

As part of your pre / post deployment actions, you may include a description of any scripts that need to run before or after the destination computer volume is imaged.

**Will you be using a local deployment mechanism?**

Firewire + Disk Utility

Firewire + asr

**Do you need to deploy a Boot Camp volume?**

Winclone

NetRestore Helper

**Do you plan to integrate with a network based deployment solutions?**

**Do you plan to integrate with any third-party deployment solutions?**

Comments / Reasoning:

Are any pre-deployment actions required (including partitioning)?

Are any post-deployment actions required?



## Chapter 5 – Using NetBoot for Deployment

Use this template when documenting your NetBoot deployment strategy.

As part of your pre / post deployment actions, you may include a description of any workflow items you build into your images.

<b>How can NetBoot be used in your scenario (full-time / deployment / maintenance)?</b>	
<b>Which type of network-based image will you use?</b>	
<input type="checkbox"/> NetBoot (disk / diskless)	<input type="checkbox"/> Workflow-NetBoot (disk / diskless)
<input type="checkbox"/> NetInstall	<input type="checkbox"/> Workflow-NetInstall
<b>How many different clients of computer will use network-based images?</b>	
<b>How many NetBoot servers will server these images, including load balancing?</b>	

In your situation what other networking is needed for NetBoot (DHCP, routing, multicast)?

Are any pre-deployment actions required (including partitioning)?

Are any post-deployment actions required?

## Chapter 6 – Post System Deployment Considerations

Use this template when documenting your post system imaging deployment actions and strategy.

As part of your pre / post deployment actions, you may include a description of any workflow items you build into your images.

<b>What post system imaging issues need to be solved in your situation?</b>	
<b>Are there any ARD3 tasks that can help with post system imaging issues?</b>	
<input type="checkbox"/> Send UNIX Command <input type="checkbox"/> Copy Files	<input type="checkbox"/> Install Package <input type="checkbox"/> Configuration Settings
<b>Are additional Launch Daemons necessary? What will they do?</b>	
<b>Are Login / Logout Scripts necessary? What will they do?</b>	

What periodic scripts need to be run (daily / weekly / monthly)?

What other methods of automated installation /setup will be used?

What server setup configuration files will be saved (text, XML, directory service)?

What server service configuration files will be saved?

## Chapter 7 – Ongoing Monitoring and Maintenance

Use this template when documenting the ongoing actions you will take to maintain and monitor your deployed systems.

Include the frequency of actions where applicable.

Which type of tasks will you schedule, repeatedly use with ARD3?	
<input type="checkbox"/> Send UNIX Command <input type="checkbox"/> Copy Files	<input type="checkbox"/> Install Package <input type="checkbox"/> Configuration Settings
Which type of ARD3 reporting will be required? On what computers?	Frequency [ HH / DD / WW / MM / YY ]
How will you handle asset and license management / enforcement?	Frequency [ HH / DD / WW / MM / YY ]
How will your computers access Apple software updates?	Frequency [ HH / DD / WW / MM / YY ]
<input type="checkbox"/> Apple's main servers <input type="checkbox"/> Internally managed Apple Software Update service <input type="checkbox"/> Internally managed third-party tool	

<b>What method will you use to handle additions and third-party updates?</b>	<b>Frequency [ HH / DD / WW / MM / YY ]</b>
<b>When will system deployment components be reviewed / updated?</b>	<b>Frequency [ HH / DD / WW / MM / YY ]</b>
<b>When will client settings (managed or otherwise) be reviewed / updated?</b>	<b>Frequency [ HH / DD / WW / MM / YY ]</b>