**Installation Plan Template**

**< Software name >**

|  |  |
| --- | --- |
| Document No: |  |
| Prepared by: |  |
| Date: | DD-MMM-YYYY |
| Version: | 1.0 |

Document Approval

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Role** | **Date** | **Signature** |
| <Author> | Author |  |  |
|  | IT |  |  |
|  | Validation |  |  |

Document Control

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Author** | **Date** | **Description** |
| 1.0 | <Author> | DD-MMM-YYYY | First Version |

**Table of Contents**

[1 Introduction 4](#_Toc514018266)

[1.1 Objective 4](#_Toc514018267)

[1.2 Scope 4](#_Toc514018268)

[1.3 Supporting Documentation 4](#_Toc514018269)

[2 System Description 5](#_Toc514018270)

[2.1 Hardware 5](#_Toc514018271)

[2.2 Software 5](#_Toc514018272)

[2.3 Network 5](#_Toc514018273)

[2.4 Configuration 5](#_Toc514018274)

[3 Impact/Dependencies 6](#_Toc514018275)

[4 Installation Schedule 7](#_Toc514018276)

[4.1 Installers Specimen Signatures 7](#_Toc514018277)

[4.2 Installation Services 8](#_Toc514018278)

[4.3 Supporting Documentation 8](#_Toc514018279)

[5 Installation Problem/Resolution Log 10](#_Toc514018280)

# Introduction

## Objective

Insert details of the objectives for the installation. For example, To install the operating system on a test server for a system 1234.

## Scope

Insert the scope of the installation.

## Supporting Documentation

Insert a list of documentation that is required to execute this Installation Plan.

# System Description

Insert a description of the system the Installation Plan relates too.

## Hardware

Insert details of the hardware environment the installation is being carried out on.

## Software

Insert details on the software environment the installation relates too.

## Network

Insert details of the network environment.

## Configuration

Insert details of the specific configuration of the system.

# Impact/Dependencies

Insert details on the impact of the installation and any other systems and tasks that this installation is dependant on.

# Installation Schedule

Each installation is followed by a check that it has been installed correctlywhich must be signed and dated by the person performing the installation. Any problems or unusual occurrences during the installation must be recorded in the Problem Resolution Log in Section 5.

Acceptance criteria not supported by documented evidence shall be signed by the installer/tester and a witness.

|  |  |
| --- | --- |
| Scheduled date | DD-MM-YYYY |

## Installers Specimen Signatures

Immediately prior to installation, all installers and witnesses/authorisers should sign and initial below.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Installer/tester name | Tester signature | Client Name | Role/Position | Client Signature | Date |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

## Installation Services

Insert a description of the installation procedure.

| Step | Installation Instruction/Test | Services included or not  (Yes /No) | Acceptance Criteria | Acceptance Criteria met? (Yes or No)  \*Delete as applicable | Signatures and date (dd/mmm/yy) |
| --- | --- | --- | --- | --- | --- |
|  | Consultation with client for rolling out (obtain approval) |  |  |  |  |
|  | Walk through the installation process |  |  |  |  |
|  | Pilot test before actual installation |  |  |  |  |
|  | Pre-installation training |  |  |  |  |
|  | Installation |  |  |  |  |
|  | Post-installation training |  |  |  |  |
|  | Post installation service |  |  |  |  |

## Supporting Documentation

Full identity and number of pages of any supporting documentation appended (If none, state “None”, sign and date):-

|  |  |  |  |
| --- | --- | --- | --- |
| Title (of Supporting Documentation appended) | Document’s unique identity (e.g., version no., date, date of signing etc) | No. of pages | Appended by:- (Signature & date) |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Installation Problem/Resolution Log

This ***must*** be completed if any acceptance criteria are not met in the preceding sections.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Item number | Description of problem encountered | Description of the resolution | Referenced documentation (name date & number of sheets OR “None”) | Installer and witness (signature and date) |
|  |  |  |  |  |
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