<Enter Project Name Here>

Deployment Plan



Department of Veterans Affairs

<Month><Year>

Version *<#.#>*

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Revision History

| Date | Version | Description | Author |
| --- | --- | --- | --- |
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Place latest revisions at top of table.

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Artifact Rationale

The Deployment Plan defines the scope and approach planned for the deployment of project deliverables. The plan includes information about system support, issue tracking, escalation processes, and roles and responsibilities that applies before, during, and after deployment. Its purpose is to provide clients, stakeholders and support personnel with a smooth transition to the new product or software. It should be structured appropriately, to reflect deployment planning for a single location or multiple locations, a single-phase deployment or a multiphase deployment, and should identify the requirements and responsible party for each process step.

The Project Management Accountability System (PMAS) Directive cites system deployment and operational planning and management as critical responsibilities of the Service Delivery and Engineering (SDE) organization.

Instructions

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* *Use the provided paragraph styles*
* *Delete all Instructional Text before finalizing the document, including these instructions.*

*The following project types are required to complete this artifact. Exceptions are outlined where needed throughout the document.*

| Activity | New Capability (A) | Feature Enhancement (B) |
| --- | --- | --- |
| **Field Deployment (1)** | Yes | Yes |
| **Cloud/Web Deployment (2)** | Yes | Yes |
| **Mobile Application (3)** | Yes | Yes |

Table of Contents

[1. Introduction 1](#_Toc421540852)

[1.1. Purpose 1](#_Toc421540853)

[1.2. Key Definitions 1](#_Toc421540854)

[1.3. Plan Overview 2](#_Toc421540855)

[1.4. Statements of Understanding 2](#_Toc421540856)

[1.5. Dependencies 3](#_Toc421540857)

[1.6. Constraints 3](#_Toc421540858)

[2. Deployment Roles and Responsibilities 3](#_Toc421540859)

[3. Schedule 4](#_Toc421540860)

[3.1. Timeline 5](#_Toc421540861)

[3.2. Site Readiness Assessment 5](#_Toc421540862)

[3.2.1. Deployment Topology (Targeted Architecture) 5](#_Toc421540863)

[3.2.2. Site Information (Locations, Deployment Recipients) 5](#_Toc421540864)

[3.2.3. Site Preparation 6](#_Toc421540865)

[4. Deployment Resources 6](#_Toc421540866)

[4.1. Facility Specifics *(optional)* 6](#_Toc421540867)

[4.2. Hardware 7](#_Toc421540868)

[4.3. Software 7](#_Toc421540869)

[4.4. Documentation 8](#_Toc421540870)

[4.5. Communications 8](#_Toc421540871)

# Introduction

The project manager (PM) should tailor these paragraphs according to the characteristics of the project.

This document describes the plan to deploy and install the <product name>, as managed through the <full project name> project. This document is a companion to the project management plan for this effort.

## Purpose

The purpose of this plan is to provide a single, common document that describes how, when, where, and to whom the <product name> will be deployed. The plan also identifies resources, communications plan, and rollout schedule. Specific instructions for installation, back-out, rollback, transition to sustainment, and user training are supplied separately in stand-alone documents, in online help, or in change management systems, depending on the requirements of the operations organization.

## Key Definitions

**Deployment Design:** Phase of the solution life cycle in which architectural design and implementation specifications are developed and tested. The preparation of plans and specifications necessary to implement the solution are part of the Deployment Design phase. At the end of the Deployment Design phase, a solution is ready for implementation in the production environment.

Enterprise System Engineering (ESE) and Product Development (as applicable, based on primary project ownership) are responsible for deployment design and complete release package specifications, including user and technical documentation, procurement, shipping, and training plans. Architectural design artifacts, release package specifics, and testing plans and results are vetted by the operations organization.

**Implementation:** Phase of the solution life cycle in which the newly designed or changed hardware, software, functionality, or process is installed into the production environment and activated. The specifications and plans created during Deployment Design steer the work that is performed during the Implementation phase.

The operations organization is responsible for installation and the installation schedule, selection and validation of shipping locations/schedule, site readiness to support installation, acceptance of equipment using asset inventory processes, coordinating and providing training (working with ESE and Product Development if applicable), communication, and vetting changes through the operations organization management.

**Release:** Release baseline is defined as the product build (software and hardware specifications) along with the body of documents that support testing, installation, operations, training, and support of the product. Projects will determine the release baseline early in the development cycle. Baseline components enter change control once the project is approved for deployment.

ESE is responsible for release management, including certifying production readiness. ESE must validate that the project owner has provided an adequate release package. ESE also validates the release baseline. As defined by the VA Office of Information & Technology (OI&T) Testing and Release checklist, the release package is the subset of documents that are provided to the operations organization, along with the product. The complete release package will be made available to the operations organization at or before deployment.

## Plan Overview

Deployment and installation of <product name> is planned as a <Choose one of the following deployment types: phased, concurrent, parallel, iterative, simultaneous, online> rollout to <enter the number> <Identify the type of target of the deployment: e.g., sites/locations/desktops/users. Keep this high-level, as the explanation will come in its own section.> over <enter amount of time>.

Deployment will be performed by team members from one or more of the operations organizations: Field Operations (FO), National Data Center Program (NDCP), Enterprise Operations (EO), or others. Keep this high-level, as the details will be provided in the specific section. Remember also to introduce the organizations and acronyms of ESE, Project Management Office (PMO), OI&T, etc. in the introduction or overview.

## Statements of Understanding

Following is a list of assumptions that may be used as **examples for tailoring** this section to the specific characteristics and needs of the project. **Enter other assumptions as appropriate, and revise or remove those that do not pertain to the project.** Do not include roles and responsibilities in this section, as that information is included in Section 2.0.

The Deployment Plan is developed with the following assumptions:

* This process is for use by projects that are required to go through the Systems Engineering and Design Review (SEDR) process.
* Prior to deployment and installation ESE, FO, NDCP and/or EO understand this deployment and are aware of testing issues, design, and similar.
* FO will assess and assure site readiness.
* FO, NDCP, and EO will be notified of upcoming deployments early in the project life cycle, as indicated in the [ESE project management process documentation](http://vaww.project.portal.va.gov/pao/).
* ESE is responsible for deployment; ESE PMs manage the deployment phase, while FO PMs and Implementation Managers and NDCP and EO representatives participate as team members.
* FO, NDCP, and EO are responsible for installation and during *<identify the phase>*; when projects are led by the PMs from those entities ESE representatives participate as team members.
* ESE is responsible for product design.
* FO, NDCP and EO are informed of design and testing issues, and participate in the [Systems Engineering and Design Review (SEDR) process](http://vaww.eie.va.gov/techstrategy/TAR/TAR%20PROCESS/Forms/AllItems.aspx).
* ESE, FO, NDCP, and EO collaborate on the development of the Deployment Plan.
* Topology determinations are made by ESE and vetted with FO, NDCP, and EO.
* Site readiness is verified through FO (adequate lead time is provided).
* FO, NDCP, and EO are involved from the beginning of the project planning within ESE.
* New requirements for Operations and Management (O&M resources will be funded.
* Deployment, installation, and ongoing maintenance costs (including capacity planning, recurring costs) will be identified and funded. All funding sources and issues should be resolved and documented prior to deployment and installation.
* Product Development or ESE (depending upon project ownership) will complete collaborative field testing prior to deployment.
* ESE Release Management will certify production readiness based upon the level of testing that has occurred prior to deployment. As part of the release baseline, this information will be identified in the release profile.
* Product Development or ESE will provide a training plan prior to deployment. *Select one, based on project ownership.*

## Dependencies

List and describe all application, system, financial and other dependencies for this deployment including upstream processing, and so on.

## Constraints

Describe the target physical environment for deployment, the security controls (for production, product must be operationally capable within full implementation of National Institute of Standards and Technology (NIST) controls and in compliance with Directive 6500), 508 compliance, and performance impacts of your deployment environment. Include any additional constraints that are unique to the product.

<boilerplate the required controls/constraints>

# Deployment Roles and Responsibilities

The PM should tailor these paragraphs according to the characteristics of the project.

List the teams that will perform the steps described in this plan, and include the following information:

* *Who is involved in this deployment?*
* *What teams are involved?*
* *Who is responsible for doing what tasks?*
* *What is the breakdown of labor and responsibilities?*
* *Who is in charge?*
* *Who will authorize the deployment?*

Identify technical and support personnel who will be involved in the deployment, including the local and FIS Implementation Managers, installers, testers, implementation team, transition to sustainment team, end users, and others. Identify the person(s) responsible for issuing the go/no-go prior to initial installation and back-out/rollback order.

You may wish to include a Deployment Roles and Responsibilities Table to capture deployment and installation activities, when they will be performed, and who will responsible. This will usually only apply to Field Deployment of new capabilities or feature enhancements.Design activities are not included in this phase. **Tailor the table to the attributes/circumstances of the project.**

Table 1: Deployment Roles and Responsibilities

| ID | Team | Phase / Role | Tasks | Project Phase (See Schedule) |
| --- | --- | --- | --- | --- |
|  | FO, EO, NDCP or Product Development (depending upon project ownership) | Deployment | Plan and schedule deployment (including orchestration with vendors) |  |
|  | FO, EO, NDCP or Product Development (depending upon project ownership) | Deployment | Develop O&M Plan |  |
|  | FO, EO, or NDCP | Deployment | Test for operational readiness |  |
|  | FO, EO, or NDCP | Deployment | Execute deployment |  |
|  | FO, EO, or NDCP | Installation | Plan and schedule installation |  |
|  | Regional PM/ Field Implementation Services (FIS)/ Office of Policy and Planning (OPP) PM | Installation | Ensure authority to operate and that certificate authority security documentation is in place |  |
|  | Regional PM/FIS/OPP PM/ | Installation | Validate through facility POC to ensure that IT equipment has been accepted using asset inventory processes |  |
|  | Regional PM/FIS/OPP PM/ Nat’l Education & Training | Installations | Coordinate training |  |

# Schedule

The PM should tailor these paragraphs according to the characteristics of the project.

The deployment is planned as a <Choose one of the following deployment types: phased, concurrent, parallel, iterative, simultaneous, online> rollout.

This section provides the schedule and milestones for the deployment. ESE provides the overall timeline parameters as agreed with the vendor and FO, NDCP, and/or EO. For field installation, FO provides the site-specific times scheduled within those parameters.

Detailed schedule includes all sequential steps that are appropriate for this deployment, including confirmation and acceptance of capacity, load, and performance testing results, back-out and rollback plan testing results and acceptance, confirmation of risk acceptance, confirmation of deconflicting deployment with other activities, issuing the ANR, opening deployment window, opening external and smoke test windows, issuing go/no-go decision, window to turn off monitoring during deployment, issuing back-out/rollback decision, opening back-out testing window, recording installation or back-out/rollback complete date/time, beginning transition to sustainment, and recording completion of transition to sustainment.

## Timeline

The deployment and installation is scheduled to run for <duration>, as depicted in the master deployment schedule <reference project plan>.

Insert a timeline (list or diagram) depicting entire timeline, depending on the deployment type.

## Site Readiness Assessment

The Site Readiness Assessment section of this document must be completed for all deployments. The PM should tailor these paragraphs according to the characteristics of the project, to answer the following:

* Where is this deployment happening?
* What product, site, or object is the physical recipient of this deployment?
* Is it happening at physical locations?
* Is it happening to devices? Desktops? Mainframe systems?
* Is there a site readiness checklist available that can be completed prior to installation?

This section discusses the locations that will receive the <product> deployment. Topology determinations are made by ESE and vetted by FO, NDCP, and EO during the design phase as appropriate. Field site coordination is done by FO unless otherwise stipulated by FO.

### Deployment Topology (Targeted Architecture)

Describe the ESE-ratified deployment topology (EO, RDCs, local sites, etc.).

### Site Information (Locations, Deployment Recipients)

Please note that this template uses the generic word “site” to refer to the physical location that will host the deployed product. Please substitute other terms as appropriate.

List the sites at which deployment is planned, according to the schedule.

### Site Preparation

Describe the preparation required for the site at which the system will operate. Define any changes that must occur to the operational site and specify features and items that should be modified to adapt to the new product. Identify the steps necessary to assist the customer in preparing the designated sites for installation of the accepted products. Enumerate any special requirements for operating the product that must be fulfilled by entities with operational responsibility – does the product have any unique requirements for power, racks, cooling, etc.? Call out any specifics that must be known to properly plan for installation, activation, and operation.

The following table describes preparation required by the site prior to deployment.

Table 2: Site Preparation

| Site/Other | Problem/Change Needed | Features to Adapt/Modify to New Product | Actions/Steps | Owner |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

# Deployment Resources

The Resources section of this document must be completed for all project types. Note that Section 5.1: Facility Specifics is optional, depending upon the relevance of the topic to the project circumstances. The PM should tailor these paragraphs according to the characteristics of the project.

Use this section to describe hardware, software, facilities, and documentation, and any other resources, other than personnel, required for the deployment and installation.

**Post-deployment** hardware, software, and system support roles and responsibilities are defined in the Project O&M Plan.

## Facility Specifics *(optional)*

Provide additional details about facilities required to install the product. The term “facilities” may refer to special buildings or rooms within the sites. Specifics may be raised flooring, power requirements, and special features to support privacy and security requirements that are unique to particular facilities. If this section is unnecessary, delete it.

The following table lists facility-specific features required for deployment.

Table 3: Facility-Specific Features

| Site | Space/Room | Features Needed | Other |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Hardware

Identify the platform required to run and support the deployment, as required (hardware, Web-based, and so on). Specify model, versions, and configurations. Provide information about manufacturer support and licensing. Identify support options to include answers to the following questions:

* Will ESE, FO, NDCP, or EO support or an external vendor?
* What are the hours of support?

Provide a link or reference to the System Design Document, the Service Level Agreement, the OAP, the O&M Plan, and/or a report from a CMDB, or complete the table below.

The following table describes hardware specifications required at each site prior to deployment.

Table 4: Hardware Specifications

| Required Hardware | Model | Version | Configuration | Manufacturer | Other |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

Please see the Roles and Responsibilities table in Section 2 for details about who is responsible for preparing the site to meet these hardware specifications.

## Software

Identify the software required to run and support the deployment, as required. Specify product, versions, and configurations. Provide information about manufacturer support and licensing.

Identify support options to include answers to the following questions\*:

* Will ESE, FO, NDCP, or EO support or an external vendor?
* What are the hours of support?

Provide a link or reference to the System Design Document, the OAP, the Version Design Document, the Patch Description, or complete the table below.

The following table describes software specifications required at each site prior to deployment.

Table 5: Software Specifications

| Required Software | Make | Version | Configuration | Manufacturer | Other |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

Please see the Roles and Responsibilities table in Section 2 above for details about who is responsible for preparing the site to meet these software specifications.

## Documentation

Identify and describe each information product that will be produced to aid in the installation, back-out/rollback strategy and plan, support, testing, transition to sustainment plan, or use of the product.

Each project establishes a release baseline of critical information prior to the PMAS MS1 review. This is the information that enters into change control at deployment. A subset of this information accompanies the product release to the field. This is referred to as the release package.

List the information products/reports that support installation, administration, and testing of the product, for example, deployment guide, user guide, and so on.

## Communications

Describe any notifications activities, such as deployment launch, site start and completion, overall deployment completion, and so on, and how they will occur. Describe, for example, the method the technicians will use to communication during the deployment, the method of notifying all stakeholders of the successful release of the product. Include input from FO on any planned communications with the sites.

Template Revision History

| Date | Version | Description | Author |
| --- | --- | --- | --- |
| June 2015 | 1.5 | Updated to latest Section 508 conformance guidelines and remediated with Common Look Office Tool | Process Management |
| May 2015 | 1.4 | Revised during the PMAS Process Improvement Lockdown II | Lifecycle and Release Management |
| February 2015 | 1.3 | Updated template according to input from the PMAS Process Improvement Lockdown | Lifecycle and Release Management |
| November 2014 | 1.2 | Updated to latest Section 508 conformance guidelines and remediated with Common Look Office Tool | Process Management |
| February 2013 | 1.1 | Updated formatting to ProPath documentation standards and edited for Section 508 conformance | Process Management |
| January 2013 | 1.0 | Initial Version | PMAS Business Office |

Place latest revisions at top of table.

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