

Installation Process Guide and M&V Enablement

This document is intended as an overview of the Surveyor installation process for our customers and partners so that the majority of questions are answered prior to the actual day of installation. This document can be used in conjunction with the Surveyor Administrator's Guide for a comprehensive review of the entire process.

What is Installation?

In relation to the SURVEYOR product, a successful installation means deployment of the server component (and its associated data store), installation of the reporting component, and installation of the client component to a significant number in the PC population. As one might recognize, the deployment/installation process may extend across a number of days. The installation of the SURVEYOR server and report tool components usually take about 1 hour (total), with the bulk of installation work revolving around getting the client component loaded onto the PC population.

SURVEYOR has been engineered to be remotely installed using most remote push (3rd-party) tools, such as Active Directory, Microsoft's SMS, Tivoli, OpenView, and Altiris. In addition, Verdiem has created tools to assist in the process of deployment using login scripts or images. The SURVEYOR client can also be manually installed.

What is M&V Enablement?

At no charge to our customers, Verdiem currently provides a measurement and verification enablement process which outlines the power and savings to be achieved based upon the installation of SURVEYOR. Such analysis is delivered to the customer at the conclusion of post-enforcement data collection.

What Hardware will be Needed?

Server - SURVEYOR is a client/server network application that requires a server machine to house the server software component. This server must meet the minimum specifications as set out in the **SURVEYOR Technical Specifications** document provided by Verdiem. This machine should be setup with the correct hardware and OS configurations prior to kicking off the deployment to help maximize the deployment professional services time provided by Verdiem.

Other – Depending upon the size of the organization, it may be required to also use a fully licensed SQL server database (i.e. the number of computers that are required to control with the SURVEYOR product exceeds 4,000).

SURVEYOR is a self-contained solution that requires nothing other than these one or two machines. Of course, there will be a piece of software (the SURVEYOR Client) installed on the PCs that you wish to control – so these client computers are an inherent requirement.

What is the Typical Installation and M&V Enablement Timeline?

The SURVEYOR installation process can be done in a short timeline to allow the customer to start achieving immediate savings, however, coordination and communication among all parties is critical to achieving this outcome. Typical installation timelines for companies that have a centralized desktop management system or central authentication range from 1-10 days. To the extent a network is not configured as described above, deployment of the client software in Step 2 may take longer. Over 95% of the effort involved in installing SURVEYOR is complete by the time step 2, Installation of SURVEYOR and client software is complete. The remaining steps require little, if any, effort from the customer, and are primarily data gathering and analysis to facilitate the M&V report provided as part of the installation services. The network configuration and client software deployment timeline will be discussed in detail at the pre-installation meeting.

STEP	ACTIVITY	TIMELINE
1	Pre-Installation Meeting	At or prior to PO receipt
2	Installation of SURVEYOR server and client software	1 – 10 Days
3	Baseline Data Collection	9 Days
4	Verdiem Analysis of Baseline Data Collection	2 Days
5	Energy/IT Policy Rollout	1 Day
6	Post-Enforcement Data Collection	9 Days
7	Final Report Delivery Meeting	2 Days

What occurs during each stage of the installation process?

Step 1 – Pre-Installation Meeting:

The Verdiem account executive will arrange a meeting with the business owner, IT, and a Verdiem professional services consultant to review the installation and M&V analysis timeline and the related responsibility and assignment of resources. At the conclusion of such meeting a project implementation timeline will be agreed to and a date set for the final report delivery meeting. Throughout the installation process the business owner and IT will receive weekly status updates outlining progress against the agreed upon timeline.

Step 2 – Installation of the SURVEYOR Server and Client software:

The Verdiem professional services consultant will install and configure the server software. A test of the client/server communication will be performed and remote methodologies to 'push' SURVEYOR Client software will be created, tested, and deployed. Appropriate personnel will be trained in the administration of SURVEYOR Server and the SURVEYOR Report Tool. The client software must be deployed to a statistically significant population prior to Step 3.

Step 3 – Baseline Data Collected and Sent to Verdiem:

Depending upon the network configuration the deployment of client software can take as little as one day or up to several days. In the event client deployment takes longer than a couple days, Verdiem will begin baseline data collection when the client software is deployed to a statistically significant population. While baseline data gathering is occurring the customer will continue to deploy the client software to the rest of the environment. Upon completion of gathering 9 days of baseline data the customer will backup and send the data file to the Verdiem professional services consultant.

Step 4 – Verdiem Analysis of Baseline Data Collected:

The professional services consultant will analyze the baseline data collected and develop recommended power management policies to be configured to optimize energy savings. These policies will be provided to IT to rollout. It is highly recommended that deployment of the client software to the PC network be complete before a company begins Step 5.

Step 5 – Energy/IT Policy Rollout:

The IT department will apply the suggested policy configurations received from Verdiem to their network. Additionally IT will notify users of the related software. A notification template will be provided by Verdiem.

Step 6 – Post-enforcement Data Collection:

Customer will collect and send to the Verdiem professional services consultant 9 days of post-enforcement data.

Step 7 – M&V Final Report:

The professional services consultant and account executive will meet with the Business Owner and IT to review the results of the M&V final report that outlines savings based upon the installation of SURVEYOR. Additionally, the benefits of Verdiem maintenance and the related maintenance renewal process will be reviewed.

What Actions Should the Customer Expect to Take?

SURVEYOR software provides high value and a quick return on investment (ROI) with minimal time consumption from the IT department. Outlined below are the steps that you can expect will need to be performed by IT.

1. The Customer (including Business owner and IT) will need to attend the Pre-Installation meeting (1 hour)
2. The machine to host the SURVEYOR server software must meet or exceed server minimum specifications and be configured and ready for the installation on the date specified. The Customer will need to be available for the installation date and provide access to a few client 'test' machines in order to test the 'push' methodology (1 day)
3. If a Verdiem professional services consultant has not been retained to perform such services, the Customer must 'push' out the client software within a reasonable timeframe that will be agreed to by both parties during the pre-installation meeting.
4. The Customer must send a copy of the baseline SURVEYOR data file to Verdiem (10 minutes)
5. The Customer will receive suggested Power Management policies from Verdiem to be configured in the system. In addition, the customer will receive a sample 'User Notification Letter' (UNL) from Verdiem to send to appropriate personnel (2 hours)
6. The Customer must send a copy of the post-enforcement SURVEYOR data file to Verdiem (10 minutes)

Recommended References:

SURVEYOR Technical Specifications – This document describes the minimum and recommended hardware/OS combinations necessary to house the SURVEYOR Server and that are supported by the SURVEYOR Client software.

SURVEYOR Administrator's Guide – This document describes the SURVEYOR product from an administrative viewpoint, providing detail on using/managing the SURVEYOR system. It provides information regarding installation procedures and tools, management best practices, and reporting and measurement techniques.

These documents are available on our website: www.verdiem.com