Roll out the barrel

A multitude of issues must be addressed to achieve a smooth and successful rollout. **Dave Wozny** shares his technical know-how and equips you to face the challenge with confidence

ollouts are one of the most challenging and stressful tasks that an IT professional ever has to face. From my experience, both as a consultant and as a technical project manager overseeing many rollouts of varying size and complexity for a number of different compa-nies, there is one common denominator that distinguishes the rollout project from any other: the 'user factor'. While the introduction of new line-of-business applications such as e-mail, upgraded hardware, etc may fail to capture users' imaginations, there is nothing like blitzing people's treasured desktops and replacing them with a different environment to awaken their interest and stir anti-IT sentiments, especially if you're adding new applications and making it more difficult for people to modify and customise settings.

Because of the influence of the user factor in a suc-cessful rollout, this article emphasises the importance of addressing these considerations as well as the technical issues surrounding such an undertaking. The technical influences on a project are far too widespread to cover in detail in this article. Instead I will present some of the most frequent obstacles that I've encountered and dis-cuss how they can be addressed:

Design for simplicity, not complexity. Far too many rollout projects are hindered by over-elaborate design goals. Trying to make every aspect of a user's configura-tion roam, especially for 16-bit and non-Microsoft 32-bit applications, is unrealistic. Similarly, trying to establish a single configuration for the entire organisation is often unattainable. Remember, having a small number of man-aged configurations is not a sin. In short, keep it simple.

Implement adequate change control procedures. Technical developments and changes to build configura-tions should follow design decisions and recommenda-tions, not the whims of developers. Carefully controlled and effected changes are the only way to ensure that consistent updates are applied and that design and deployment ownership is maintained. Make these con-trols workable. If they are not, they will only be bypassed and you will have wasted your effort. Beware the cost of non-conformity!

Ensure accurate inventory and impose a freeze on PC movements. Obtaining accurate and up-to-date asset information is always problematic, and generating a workable deployment schedule to fit this static informa-tion is often a difficult challenge. Add PC movements into the mixing pot and stir. What you now have is an impossi-ble moving target that you just can't reach. Ensure that

the project sponsors are doing everything in their power to get the backing necessary to freeze movements throughout the project.

■ **Beware hardware sizing and compatibility problems.** Be realistic about minimum specifications for PCs. Those Pentium 90s with 32Mb RAM may just about boot the NT4 operating system, but remember a poor user then has to operate that PC and fire up Word and perhaps Outlook. That PC will probably produce many support calls, hugely increasing its cost of ownership. Replacement costs should be vigorously justified against this increase in ownership cost.

■ **Make the right peripheral hardware decisions.** If there's one thing that slows rollouts to a standstill it's reconfiguration of peripheral devices, particularly with Windows NT 4. Sensible decisions need to be made about attempting to support peripherals that only have poor driver support. Try to reach a workable compromise with the project sponsor, so that any devices that cannot be set up within, say, two hours will fall back onto the helpdesk for resolving with internal support. It is essential that the rollout heartbeat is not disrupted because of a few dodgy scanners and CD writers.

Is your driver ready?

Having the right drivers available is always a challenge. Do some research and get as many as possible cut onto a CD to issue to all the deployment technicians – and don't forget those .cab files or i386 folder.

Rapid deployment practices. After many years of bury-ing their heads in the sand and threatening to refuse support to anyone who uses disk or partition cloning deployment methods, Microsoft now acknowledges and endorses this valid technique. SID generation issues were part of the reason Microsoft wanted us all to avoid using

cloning, but now the company has produced the 'SysPrep Tool' which works with third-party disk-cloning tools such as Norton Ghost or PowerQuest Drive Image Professional to overcome the SID problem. Microsoft only supports computers deployed with its own SysPrep SID generator. It does not support SID changes generated by third-party products. When designing your images bear in mind that software components will inevitably change owing to fixes, enhancements and new requirements. Do not get paranoid about making changes; just make sure you do them in a controlled manner – and remember, the change controls are there to help you, so make sure they are workable and not too bureaucratic.

Documentation. This is the boring bit that always gets left until the end of the project, at which point systems are operational and there seems little point in doing it. Wrong! I once heard a quote along the lines of "the proof of understanding is the ability to explain", and I believe project documentation follows this rule – if you can't adequately document something, you probably don't really understand it. Don't get hung up about beautifully formatted pages with sectioning and numbering that would do a legal practice proud. We are talking practicality and usability here. Any documentation that ends up curled at the edges, smudged, torn and scribbled upon has probably hit the spot. Documentation that sits pristine in a project folder and never sees the light of day has failed.

> **Far too many rollout projects are hindered by over-elaborate design goals. Trying to make every aspect of a user's configuration roam, especially for 16-bit and non-Microsoft 32-bit applications, is unrealistic**

Things will never be the same

Windows 2000 will change for ever the way rollouts are conducted. It has excellent deployment tools built in, especially the support for remote installation services, which will make many of the technical aspects of managing a rollout easier. Network interface cards supporting the Pre-boot eXecution Environment (PXE), which enables connection to servers without any need for boot disks and client software, will be a huge leap forward.

However, it will be more important than ever to bear in mind that technical excellence in itself will not deliver a successful project. When it comes to project assessment, it is still people and organisation that make the difference between winners and losers. ●
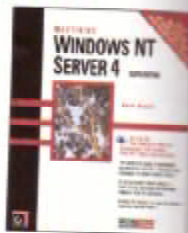
David Wozny is technical project manager at Lynx Technology.