

Installation and Configuration Guide Template

Use this guide to plan, install, verify, configure, and remove a product. Separate procedures by installation method or platform so an installer can follow one complete path for the target environment.

Complete the bracketed fields with approved information for the product, organization, or program being documented. Repeat the named forms where several tasks or subjects need separate records. Remove sections that do not apply and retain links to the material used to complete the document.

Document control	Entry
Document identifier	[Identifier used by your team]
Scope and applicable version	[Product, program, locations, and version covered]
Prepared and maintained by	[Responsible role or team]
Revision and review	[Revision, review date, and approval reference]

Getting Started

Identify the product and the installation path covered by the guide. Describe the supplied components and the responsibilities of the installer and administrator.

Field	Complete with
Product identification	[Product name, model or edition, version, and applicable package]
Audience and scope	[Installer qualifications, administrative responsibilities, and exclusions]
System overview	[Components, topology, supplied items, and installation methods]
Related information	[Vendor references, conventions, and terminology used by the guide]

Safety Information

Place general precautions before installation tasks and repeat a specific warning immediately before the action it governs. Record the exact warning and the source that establishes it.

Field	Complete with
Hazard or precaution	[Relevant handling, connection, electrical, physical, or data protection concern]
Affected task	[Installation or configuration action to which the message applies]
Required control	[Source-stated qualification, isolation, protection, or preparation]
Emergency or recovery	[Source-defined response and the relevant procedure or contact role]

Planning and Requirements

Record requirements for the selected platform with units and versions. Identify the checks that show the target is ready before installation begins.

Field	Complete with
Platform and site	[Hardware, software, environmental, and compatibility requirements]
Connectivity	[Network paths, ports, accounts, permissions, and external services]
Capacity and licenses	[Sizing basis, storage, entitlements, and supported limits]
Readiness	[Check, expected result, observed evidence, and unresolved issue]

Preparation

Complete preparatory tasks before opening the installation procedure. Keep the package and backup references sufficient to identify exactly what will be installed and protected.

Field	Complete with
Delivered materials	[Package identifier, approved download source, supplied items, and integrity check]
Site preparation	[Mounting, space, access, connectivity, or other source-defined preparation]
Protection	[Backup scope, recovery reference, and required isolation or precautions]
Authorization	[Readiness decision, required role, and change or work order reference]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Installation

Repeat this task form for each supported method, component, or platform. Use exact labels and commands and identify any point at which the procedure branches.

Field	Complete with
Method and target	[Installation option, platform, environment, and applicable version]
Prerequisites	[Completed preparation, access, tools, dependencies, and relevant warnings]
Installation sequence	[Actions, branching conditions, configuration inputs, and expected results]
Failure recovery	[Stop condition, diagnostic evidence, and approved recovery or restart point]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Verification and Commissioning

Record the checks that establish a working installation. Separate the product starting successfully from acceptance of its intended function.

Field	Complete with
Initial startup	[Startup action, indicators, and expected state]
Functional checks	[Check, test input, expected output, and observed evidence]
Acceptance	[Source-stated acceptance criteria, reviewer role, and disposition]
Handover	[Configuration baseline, unresolved issues, training, and operational references]

Configuration

Create one record per configuration task and keep reusable parameter definitions in the reference table. Distinguish environment-specific settings from shared defaults.

Field	Complete with
Configuration task	[Desired behavior, affected component, and required role]
Parameter reference	[Exact setting name, accepted values, documented default, and meaning]
Selected values	[Environment, selected value or secret reference, and reason]
Verification and reversal	[Observable result, evidence, and approved reversal procedure]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Upgrade Migration and Removal

Treat an upgrade or removal as its own procedure. Record dependencies and the restored or decommissioned state that must be checked before closing the work.

Field	Complete with
Supported path	[Starting and target versions or removal scope]
Readiness	[Compatibility, dependencies, backups, permissions, and maintenance impact]
Execution and reversal	[Ordered actions, rollback criteria, and approved recovery reference]
Completion	[Verification, retained data or records, access changes, and handover]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Troubleshooting and Reference

Keep diagnostic information close to the symptoms an installer sees. Use consistent error text across the symptom record, code table, and corrective procedure.

Field	Complete with
Symptom	[Exact message or observable condition and installation phase]
Diagnosis	[Preliminary checks, evidence, likely cause, and decision points]
Resolution	[Corrective action, expected recovered state, and escalation condition]
Reference	[Error codes, log paths, commands, settings, terms, and source documents]