Linux Installfest HOWTO

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Revision History

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Added the Translations section, corrected the section number references in the license and removed the reference to the defunct www.installfest.org.		
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Added obfuscated email address.		
Revision 1.0	2004−06−01	Revised by: EM
Initial release. Thanks to Tabatha "CTRL−I" Marshall for all her encouragement.		

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1. Introduction

This document provides some guidelines that should help you run a successful installfest. For purposes of this document, an installfest is a gathering at which experienced Linux users assist less experienced users with the installation and configuration of Linux distributions, and where Linux users can bring Linux systems to receive assistance with system problem remediation.

Please take from this document whatever you want. It is meant to be a guide, not a recipe that must be followed exactly to have a successful installfest. Any installfest where most of the people leave happy is a successful event.

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1.2. Scope

In order to limit the scope of this document, there are some issues that will *not* be covered:

- While other activities may occur at the same time and in roughly the same location as an installfest, they will not be considered part of the installfest for the purposes of this document.
- This document does not include any discussion of technical issues related to the installation of any Linux distribution.
- This document does not currently contain any discussion of installfest server or network configuration, although such a discussion may be added to this document in the future. It may be more appropriate for such information to be contained in a separate HOWTO.
- This document does not contain any discussion of new user education.

1.3. Version

The current version of this document can be found at The Linux Documentation Project (http://www.tldp.org)

1.4. Translations

You are welcome to translate this document into another language but please see the TRANSLATIONS section of the license for information regarding your responsibilities.

Also, please work with the helpful and kind people at The Linux Documentation Project (http://www.tldp.org) so that you can contribute your translation to the project.

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2. Roles

People involved in an installfest will assume one or more of the following roles

coordinator
: contact for all other participants

host
: has the connection to the location

sponsor
: represents an organization that provides the location, equipment, network, materials, food, beverages, etc. to the installfest

user
: needs assistance installing a Linux distribution or solving a specific problem

receptionist
:
    - ◊ greets people as they come in, gives them a name tag and has them sign a waiver
    - ◊ can direct people to the restrooms, the nearest computer store
    - ◊ orders food and beverages

tier 1 support
: people who are knowledgeable about Linux and are willing to share their knowledge and provide hands−on assistance to users

tier 2 support
: sets up and maintains network hardware and services (DNS, DHCP), mirrors of Linux distributions

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3. Before, During and After

This HOWTO has three sections for things you should think about or do *before*, *during* and *after* the day of the installfest. It is assumed that you will be having installfests periodically and hopefully regularly.

3.1. Before (preparation)

3.1.1. date, time and duration

In order to reach the most people, fests should be held on both weekends and weekdays. The time of day is not as important as the duration of the fest, which should be 6 to 10 hours. Here is why:

- some people will not be able to arrive when the fest starts
- it takes time to get systems moved in, connected, disconnected and moved out of the working area
- making sub−systems like sound, printers and other peripherals function properly sometimes takes as long as a Linux installation
- some people want to get some life out of older CPUs but OS installation takes longer on slower machines

3.1.2. location

Make sure that the place where your installfest will be held has:

strong tables
: Each table may have to hold multiple monitors and computers.

restrooms

chairs
: People will want to sit down since they will be at the fest for several hours.

Internet access
: Some people will want to know that they can access the Internet from their computer. Some people will need to download drivers or other software. A lot of helpful information is available on the Net. There is a list of Web sites at the end of this document.

an address that is easy to find
: A map and simple directions will help.

telephone connection
: A normal line, not through a PBX, not digital, just POTS will be useful for testing modems.

an easy way to get hardware in and out
: How will people bring their hardware from their cars to the installation room? Are carts and elevators available?

sufficient AC power
: Try to make sure that you have enough power for the number of computers that you expect people to bring. You do not want people to suddenly lose power because one person too many turned on his or her computer.

: How much power does a computer need? Laptops need about 0.5 amps. For a desktop/tower/workstation type of computer the amount of power needed depends on the monitor, number of disk drives, etc. Basically though, if everything is connected to one power strip, then they need at most 3 to 4 amps at the moment that the power is turned on and 1.5 to 2 amps while they are running.

You should try to have access to the circuit breakers either directly or through readily available maintenance staff.

If you are lucky you will be able to make arrangements to regularly hold installfests at a few locations that meet your needs. If possible you should hold your fests at a variety of locations such as technical colleges, universities and businesses because Linux is for everyone.

3.1.3. administration

Linux distributions (distros)
: Make sure that you will have several copies of the latest versions of the major Linux distributions available on CD. Some users will need small/minimal distributions on floppy disks so make sure that those are available. To learn which distributions to make available, please do a little research on the Web sites listed in the appendix of this document.

installfest server
: You may want to consider setting up a server for:

  - DNS
  - DHCP
  - mirrors of distributions

  You should provide multiple methods of accessing the distributions on the server:

  - FTP
  - rcp
  - HTTP
  - CD burning
  - NFS

  In order to conserve disk space you can create a virtual CD−ROM jukebox. See Randolph J. Tata's "CDServer−HOWTO" (http://talcon.com/cdserver−howto/) and Jeremy Impson's article "Build a Virtual CD−ROM Jukebox" (http://www.linuxjournal.com/article.php?sid=5639) for more information.

  Hopefully someone will create a new Linux distribution to make it easy to set up such a server.

name tags
: Something similar to the classic "hello my name is:" stickers.

misc. office supplies
: You may want to make some of the following items available: scratch paper, ball−point pens, sharpies, scissors, stapler, duct tape, packing tape, blank FAT formatted floppy disks (used are fine), blank CD−R media.

advertising
: People will need to know:

  - when and where the installfest will be held
  - what to expect: waiver, soft drinks, pizza
  - that if they wish to install a Linux distribution should bring every part of their computer system: monitor, keyboard, mouse, speakers, USB devices, power strip. Support people will need all the components to make sure everything is functioning properly.

◊ that they may want to bring blank CD−R media to trade for copies of distributions on CD−R (they should determine the number of disks needed for each distribution)

Here are some places to consider advertising:

◊ local computer user Web sites
◊ local news media
◊ local computer retail stores

minimum system requirements
: Some people will want to install Linux on very old/slow systems in an attempt to make them usable. This is OK, but there are limitations. Please look at the distributions area of www.linux.org for minimalist distributions. You may want to include minimum system requirements in your installfest advertisement so that people do not show up with an old machine, hoping to turn it into a power−house but leave disappointed.

networking equipment
: someone will need to bring network switches and cables

signage
: You should have a few signs posted to help people find their way around the location and provide other information. Some examples are:

◊ main entrance: So people know that they have found the right location.
◊ reception desk: People will need to find the reception desk from the main entrance.
◊ installation room: People will need to know how to get to the installation from the reception desk.
◊ rest rooms
◊ networking information

food and beverages
: Due to the duration of an installfest you should consider the availability of food and drink.

Pizza usually works out well. Tell people that you will be collecting a specific amount of money at the door for pizza. If they *do not* want to share some pizza, then they *do not* need to pay. In order to know who has paid, use an ink stamp to mark their hand. Do not forget paper plates and napkins.

If there are no vending machines at the location you may want to provide soft drinks, including water and possibly coffee during the fest. If you do provide drinks, you should consider selling them at cost.

3.2. During (on the day of the installfest)

1. before the starting time

   The people who run the fest need to be at the location at least one hour before the fest is to begin. They will need time to set up the network, installfest server, power system, signage, etc.
2. at the door/reception

   Depending on how you have decided to operate your fest, the receptionist will:

   - ask users to sign a waiver
   - ask users to fill out a data sheet
   - ask all attendees to contribute money for food and/or drinks
   - give all attendees name tags
3. during

Since you are using this HOWTO, everything will work out fine. People should understand that it is OK to ask around for help.

4. after the fest is finished

   Make sure that all areas are cleaned up because you may want to use the location again and you do not want to give the location owner a bad impression. Look for: items people have forgotten, items that people brought as "give aways", drink cans and cups.

3.3. After (lessons learned)

We would like to continually improve this document and everyone's installfest experience, so please share with us:

- what went wrong?
- what went well?
- new ideas?
- How this document helped or hindered you.

A. Sample Forms

A.1. Data Sheet

This data sheet is intended to be filled out by users when they arrive at the reception area.

Installfest Data Sheet

This form is *for your benefit*! It will help you and anyone who works on your computer to make reasonable decisions. Please complete one form per computer. If you don't know the answer now, just wait until you do.

Your name: ____

CPU type: _________________________________ speed: ________ megahertz / gigahertz

RAM: _________ megabytes

Hard drive 1: ______gigabytes 2: ______gigabytes 3: ______gigabytes 4: ______gigabytes

Video card: ___________________________

Monitor: _____________________________

Sound card: ____

Does this computer have (circle all that apply):

- CD or CD−RW drive
- DVD
- floppy drive
- network interface
- modem / winmodem
- printer
- other: _______________________________________

Which of these do you want to do:

1. Install Linux:

   What distribution? ___________________________

   Do you need disks? Yes / No
2. Fix one or more specific problems with an installation of Linux:

   What distribution is installed? _________________

   List the software tool(s) and/or hardware that you need help fixing: ____
3. Other, please explain:___________________________

Do you want to (circle one):

1. Dual−boot Linux and an already−installed OS?

   What is the name of other O.S.? ______________________
2. Install Linux as the only O.S.?
3. Install multiple Linux distributions?

What do you want to use the computer for? (circle all that apply)

- Internet access and usage
- learn Linux
- firewall
- server
- writing documents
- music/image storage
- other (please explain):

What is your skill level with (circle all that apply):

1. Linux/Unix:

   first−timer

   rookie beginner

   intermediate

   advanced

   guru
2. computer hardware:

   first−timer

   rookie beginner

   intermediate

   advanced

   guru
3. ______________________ :

   first−timer

   rookie beginner

   intermediate

   advanced

   guru

A.2. Legal Protection

You may want to consider having users sign some kind of agreement before any work is performed on their systems. Such a document will make it clear to users exactly what they can and cannot expect from the installfest.

If you do decide to use one of these documents, please have it reviewed by a lawyer in your area.

If you do have an agreement approved by a lawyer, please contribute to the Linux community by sending a copy to the lead author of this HOWTO so that it may be included in future versions.

A.2.1. Release

The following is a significantly modified version of a form posted on David Pitts's Web site.

INSTALLFEST RELEASE FORM

By signing this release agreement between you and the group holding the installfest (members of the ___________________________ Linux User's Group, hereinafter referred to as Installers), you give up certain legal rights. Therefore, you should read the agreement carefully. If you have any questions about the legal effect of this agreement, you should consult an attorney and not any of the Installers. Please be aware that you may not participate in the installfest event unless you have signed this agreement. By signing this release agreement, you acknowledge the following:

1. That your signing this agreement is partial consideration for the services provided by Installers.
2. That Installers do not promise that the work done on your computer equipment will be successful. An Installer will help you attempt to install, configure, or otherwise get the Linux operating system to work on your computer equipment. However, because of possible defects in computer software or computer hardware, including improperly configured computer hardware, not every attempt is successful.
3. That the attempt to install, configure, or otherwise get the Linux operating system to work on your computer equipment has inherent dangers that no amount of care, caution, instruction, or expertise can eliminate.
4. That any attempt to install, configure, or otherwise get the Linux operating system to work on your computer equipment, especially including any attempt to partition or re–partition your computer's hard drive, may result in the loss of some or all of the data stored on that hard drive. That you are hereby advised that you should back up all important data before the attempt to install, configure or otherwise get the Linux operating system to work on your computer equipment.
5. That an installfest is an inherently chaotic event at which many computer components, peripherals and systems are present; therefore, you are responsible for the security of your property.
6. That you are expressly assuming the risks of the dangers set forth above.
7. That by signing this release agreement, you hereby forever release the Installers from any legal liability they might have arising from the attempt to install, configure, or otherwise get the Linux operating system to run on your computer equipment. That this release includes, but is not limited to, any losses caused by the negligence of any Installer who attempts to install, configure or otherwise get the Linux operating system to work on your computer.

By signing below, you agree that you understand the terms above:

Your:

signature: ____

name: ____

month: ____________ day: __________ year: ________

Witness: signature: ____

name: ____

month: ____________ day: __________ year: ________

A.2.2. Waiver

The following is Copyright 1998 Chris Halsall and the Victoria Linux Users Group. Reuse permitted for Open Source Software promotion.

Linux InstallFest Waiver

I, ________________________________ acknowledge that I am participating in the "Linux Install Festival" entirely at my own risk. I assume responsibility for the integrity of the data on my computer system, have backed up all important data, and I will hold the volunteer helpers blameless for any damage to my computer system, to my data, or any other damages or liability that may result through my participation in this event. I further agree to be responsible for any licensing fees, shareware registrations, or other licensing requirements that may apply to the software I will receive. The purpose of this event is to distribute software packages that are Open Source, legally distributable with no charge to the user.

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Signature: __________________________________ Date: ___________

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C. Useful Web Sites

These Web sites may be useful in planning and running an installfest:

- The Linux Documentation Project (www.tldp.org)
- www.linux.org
- www.distrowatch.com