

- [Home](#)

- [About JAG..](#)

-

[Footprint of IT](#)

Does it really effect our lives?

Feed on

[Posts](#)

[Comments](#)

[SharePoint Best Practices - As Outlined by Microsoft IT](#)

August 10, 2007 by [Jag](#)

Microsoft IT is a best case study for the largest SharePoint implementation to date. As part of the Microsoft IT Showcase program. Big brother released a bulk of IT showcase related information in the form of web casts, presentations and TWPs (Technical White Paper). All of these provide us with better guidelines of How-To scenarios. Especially the SharePoint bit is quite interesting. Microsoft Office SharePoint Server 2007 Hosting - A Deployment Experience Overview Technical White Paper contains nice run down of best practices and lessons learned. I would recommend this TWP to anyone in the SharePoint arena. Here is an excerpt (a large one!) from the TWP. **Best practices for initial activities**

- Perform a thorough audit of all products and platforms that the upgrade may affect, including Windows Server, SQL Server, IIS, Windows SharePoint Services, and prior versions of SharePoint Products and Technologies, in addition to portals, sites, and content.
- Optimize and clean up current environments. These activities include:
 - Merging and splitting databases to optimize sizes.
 - Balancing content loads among databases.
 - Consolidating server farms where possible.
- Make sure that level settings are consistent across the environment to be upgraded.
- Identify and install missing language packs. Doing so during the upgrade itself is inefficient and can cause problems.
- Document initial activities and discoveries made during the process, creating a reference in case personnel need to look back during the upgrade to see what actions were performed and to help make future upgrades easier.

Best Practices for Planning

- Schedule and analyze pre-scan by using the pre-scan tool (Prescan.exe) at least two days before each upgrade.
- Leave space on the schedule to catch up after unexpected events. Upgrading is a complex process with a big impact on the business. It should be completed efficiently but not rushed.

- Upgrades can fail for a variety of reasons. Have a contingency plan in place in case minor or major roadblocks occur.
- Schedule database upgrades based on free space.
- Determine the priority of exceptions and to what degree they will be allowed to affect the schedule. Communicate this information to affected users.
- Frequently update the calendar and provide it to all teams involved.
- Schedule, perform, and confirm backups before performing upgrades. Ensure that backups and upgrades are not scheduled to run at the same time, because this will cause upgrade failure.
- Schedule time and resources for testing and previews of the new functionality.
- In performing a database attach, the number of sites is the most important factor in how long the upgrade will take. If many sites exist on a farm, schedule upgrades based on the number of sites. If there are fewer sites (as may be the case with team and portal sites), schedule them based on the quantity of data.
- Before upgrading, communicate that sites cannot be accessed or reverted during the upgrade.
- Define the upgrade process thoroughly before sending communications about the schedule and process. Not doing so will confuse end users and may encourage them to think the schedule is negotiable.
- Avoid committing to specific dates where possible.
- Use images in communications to explain the upgrade process to non-technical personnel.
- Send notifications to site owners and administrators often—before, during, and after the upgrade.
- Finishing the upgrade is not the end of the upgrade process. Define, convey, and implement a post-upgrade communication plan.
- Define the support process for exceptions and escalations. If some technical issues are not supported, make sure that users know beforehand.
- Training is key to getting the most benefits from Office SharePoint Server 2007, even if users are familiar with Windows SharePoint Services 2003 and SharePoint Portal Server 2003. Plan to invest time, resources, and money in training users.
- Determine whether to reset pages to site definitions (re-ghost) or leave customizations intact during the upgrade

Best Practices for the Upgrade Process

- Perform a dry run whenever feasible. Identifying and fixing problems beforehand will increase the likelihood of maintaining the schedule after the upgrade begins.
- Do not avoid testing because of limited hardware resources. Use virtual machines for testing if excess hardware capacity is not available.
- Data requirements usually grow during an upgrade; exceeding the capacity of a database will cause the upgrade to fail. Increase the target databases to appropriate sizes before the upgrade process and set databases, temporary databases, and log files to auto grow.
- Watch for upgrade problems caused by full-text search. Moving the SQL Server database to a different server or disabling full-text search on the SQL Server computer can mitigate the impact.
- Maintain a list of which sites have been upgraded.
- Move exception sites to a new content database via the Stsadm.exe command-line tool so that they do not interfere with the general upgrade process and schedule.
- Shut down and restart (bounce) SQL Server computers between SQL Server instances.
- It is difficult to complete tasks correctly the first time no matter how carefully custom templates, definitions, and Web Parts are configured before the upgrade. If performing a gradual upgrade or database attach, maintain a copy of the previous environment to allow for rollbacks if necessary.

- Do not finalize the upgrade until you are sure the upgrade is finished. Finalizing the upgrade removes the connection to the previous version and deletes any temporary data, and it is irreversible.
- Allow only one administrator at a time to make changes to the configuration database.

Best Practices for Validation

- Document the entire process in as much detail as possible. This will enable personnel to track problems back to their sources and will make future upgrades easier.
- Develop custom user guides to help users understand the specifics of your Office SharePoint Server 2007 environment.
- Lock previous site versions after the upgrade to prevent users from making updates to old sites. This not only prevents general confusion, but also helps avoid a situation in which misapplied updates are lost when old versions are taken offline.

Ok did you like the above best practices. Feel like you need to read the complete white paper, here are the links <http://www.microsoft.com/technet/itshowcase/content/hostsp07.msp>

And also it is worth checking out Microsoft IT Showcase Webcasts

<http://www.microsoft.com/howmicrosoftdoesitwebcasts> Microsoft TechNet

<http://www.microsoft.com/technet/itshowcase> Note: If you know of or recommend some other best practices for SharePoint Upgrade Planning, please feel free to leave a comment.

Posted in [SharePoint 2007](#), [WSS 3.0](#) | 2 Comments

2 Responses to “SharePoint Best Practices - As Outlined by Microsoft IT”

1. *on August 15, 2007 at 11:08 am* [1](#) [Robin](#)

Oi,

your link to the white paper site is pointing at the Visual Studio 2008 beta download page 😊

2. *on August 15, 2007 at 12:16 pm* [2](#)  [Jag](#)

Oops Looks like I am not that good at multitasking! The link is fixed now.

Thanks mate.

Jag

[Trackback URI](#) | [Comments RSS](#)

Leave a Reply

Name (required)

Mail (will not be published) (required) Website

• About Jag



Name: Jagannadha Raju Sri Raja Kakarlapudi

Alias: JAG

Present Location: Adelaide, South Australia

Actual Location: Geddanapalli (small village), India.

Suffixes for JAG: BE (Bachelor of Engineering in Computer Science and Engineering), MSE (Master of Software Engineering).

He is presently working as SharePoint Solution Specialist in SDM, a fast growing IT company based in Adelaide, Australia. His key focus areas are Microsoft Office SharePoint Server 2007 and .Net 3.0 Framework. He is also a great enthusiast of life changing technologies no matter where they come from (Microsoft, Apple, Google etc). Like to know more about Jag, checkout his profile on LinkedIn.

View my profile on 

•

• Recent Comments



[Best Web Directory](#) on [SharePoint 12 Hive - XML direc...](#)



[Deb Cunningham](#) on [Adding Menu Items \(Navigation\)...](#)



Fran on [Auto Save Your documents in Of...](#)



Ashok on [Collection of Free WebParts...](#)



Jag on [Why two SharePoint Search serv...](#)

• Recent Posts

- [TechNet Magazine Feb 08 SharePoint Articles](#)
- [Key Differences of the Four SharePoint Search Offerings](#)
- [SharePoint 2007 integration options with Various Microsoft Office versions](#)
- [links for 2008-01-11](#)
- [links for 2008-01-08](#)

• Categories

- [Certification](#) (1)
- [del.icio.us](#) (12)
- [Enterprise Search](#) (1)
- [InfoPath](#) (1)
- [IT Consultancy](#) (2)
- [Itfootprint](#) (57)
 - [Java](#) (1)
 - [Microsoft](#) (53)
 - [.Net](#) (2)
 - [SharePoint 2007](#) (44)
 - [WSS 3.0](#) (22)
- [MCTS](#) (1)
- [off beat](#) (2)
- [Office System 2007](#) (4)
- [Programming](#) (4)
- [Project Management](#) (1)
- [Rant](#) (2)
- [SharePoint](#) (4)
- [Software Engineering](#) (2)
- [Tip](#) (3)
- [Webparts](#) (4)
- [Windows Server 2003](#) (1)
- [workflow](#) (1)

• My Tags

[.Net Certification](#) [del.icio.us](#) [Enterprise Search](#) [InfoPath](#) [IT Consultancy](#) [Itfootprint](#) [Java](#) [MCTS](#) [Microsoft](#) [off beat](#) [Office System 2007](#) [Programming](#) [Project Management](#) [Rant](#) [SharePoint](#) [SharePoint 2007](#) [Software Engineering](#) [Tip](#) [Webparts](#) [Windows Server 2003](#) [workflow](#) [WSS 3.0](#)

• Top Posts

- [SharePoint 2007 integration options with Various Microsoft Office versions](#)
- [Using Query String and Data view WebPart.](#)
- [Built in SharePoint Web Services](#)
- [Document Approval Process in WSS3.0/MOSS 2007](#)
- [Adding Menu Items \(Navigation\) to SharePoint Site](#)
- [Slideshow for SharePoint Picture Library](#)
- [SharePoint Site Template Vs Site definition](#)
- [Organization Chart Web Part](#)
- [Tree View Navigation of Documents in SharePoint Document Library - Atidan Explorer for SharePoint](#)
- [Auto Save Your documents in Office 2007](#)

• [SharePoint in News](#)

- [Study Takes Aim At SharePoint's Shortcomings - CRN](#)
- [Most Mobile Users Don't Know ... - InternetNews.com](#)
- [Microsoft Office development platform ups and downs - InfoWorld](#)
- [Product Designer - Seattle Post Intelligencer](#)
- [Oracle says Windows IT pros should click with its content ... - SQL Server Magazine \(subscription\)](#)

• Blog Stats

- 41,821 hits



-  [Subscribe in a reader](#)
- [Subscribe to ITFootprint by Email](#)

ADD THIS BLOG TO MY
Technorati FAVORITES



• Member



• Spam Blocked

[2,739spam comments](#)
[blocked by](#)
[Akismet](#)

[Blog at WordPress.com.](#) | Theme: Mistylook by [Sadish](#).

☺