

CASE STUDY

Mid-size company migrates to a virtual Microsoft® SharePoint® production server.

Successful Microsoft® SharePoint® pilot program leads to a large multi-clustered rollout on a fault-tolerant, high availability VMware® vSphere virtual server.

The Background

SharePoint adoption continues to grow because it simplifies the creation of intranet or website content, supplies document management storage and provides additional features that help organizations manage their data. However, the ease of rolling out new sites can easily spiral out of control when SharePoint resides within a virtualized environment, and the need to manage site growth is even more important because explosive growth can affect other virtual systems that share the host server's resources.

As IT leaders work to meet the needs of the business while balancing associated infrastructure costs, many organizations set up a test environment of a SharePoint system with just a few pilot groups or departments. This helps them gain experience with setup and management tasks, observe how users interact with the system and determine functionality with other enterprise systems.

With limited IT resources and a virtualized test pilot environment, this IT team was able to balance the needs of the business with the test group's usage of the system.

The Situation

A mid-sized organization made a SharePoint 2007 server available to a small number of managers within three business units on a test VMware® host server. One of the business managers had an IT background and began to leverage its features for numerous projects that were just beginning.

Dependency on the system grew as this department site began collecting user change requests that were related to the company's product offering. The logical place for this additional customer information was in the company's CRM application so that a complete customer profile could be accessed in one place. Unfortunately, the internal business system programming team was backlogged with CRM programming maintenance schedules and would not be able to make these changes in a timely manner.

As a quick fix, the business department manager built a series of site lists with customized web forms using Microsoft InfoPath. After three months, the site lists had over one thousand rows of data and the manager was able to leverage the dashboards and key performance indicators (KPI) in SharePoint to provide valuable insights into customer requests. Better yet, aggregate data views and dashboards were updated in real-time, providing instant snapshots of their customer's requests.

After about six months of use, the IT department informed all of the test groups that the SharePoint pilot was over and a completely new server farm had been set up. Most of the pilot participants had simply used SharePoint as a document repository, so moving content libraries wasn't very time intensive. However, the department manager who leveraged the more comprehensive functionality of the test site had customized lists, web forms and elaborate dashboards that would require substantial resources to migrate.

The Solution

With three options available to migrate the test site to the new server farm, the department manager was faced with the following:

- **OPTION 1:** Use SharePoint Designer to back up the site and re-deploy it on the new server. This option was not viable as SharePoint Designer (SPD) 2007 was not made available to all pilot users because of its powerful abilities to change site or server settings. The IT administrators informed the department manager that SPD would not be given to site owners because of those risks, and additionally, IT had too many tasks to complete with the company rollout of SharePoint to move a single site for one department.
- **OPTION 2:** Copy all library file data and upload it manually, and export all of the list data into an Excel® file and manually upload it into a new list. The challenge with this option is that while the library files could be moved easily, the time invested in building lists, setting up the columns, defining the views, building the KPI pages and thresholds would be lost. Further, the InfoPath web forms would all need to be re-published to the server and attached to the appropriate lists—again, more time would be required to rebuild the site from the ground up.
- **OPTION 3:** Use a content management tool that would allow the department manager to simply move or copy the entire site from the test server to the new production server.

This IT department considers Ontrack® PowerControls™ an essential solution for business continuity, and purchased it as its content management solution for all of its SharePoint servers.

The Resolution

The IT administrator recommended this option to the department manager because the tool wouldn't change the server or site settings, and didn't need to be installed on the server as an application - thus meeting the IT governance policies.

Using the content management tool, all of the list settings and KPI pages were moved and links were updated to the new server's URL address. The only additional work needed was to re-publish the InfoPath web forms. However, since the forms were moved seamlessly, changes to the forms library were fast; all that was needed was a quick republish to save the updated web forms.

The pilot program was a success for this company and they rolled out a large multi-clustered SharePoint server farm on a fault-tolerant, high availability VMware® vSphere virtual server. Enabling user content migration options early on, they were able to provide seamless access to the content database without affecting other sites' data. Moreover, the content management tool enabled the team to work with future expansion of the system.

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