

# SHAREPOINT RECOVERY PLANNING CHECKLIST 2014



## Protect Your SharePoint Availability

### LEARN

- Recovery Point Objective (RPO) - maximum tolerable time period in which data might be lost due to a server farm failure  
**4 hour RPO means your farm must be backed up every 4 hours**  
Differential backups vs. incremental backups (shorter backups, but longer recover times)
- Recovery Time Objective (RTO) - maximum tolerable time period in which data might be lost due to a server farm failure  
**2 hour RTO means that data or farm must be restored within 2 hours of the system outage**
- Service Level Agreement (SLA) – formally defined and committed level of service, often expressed as % of time an application or service is available  
**99.5% availability = 3.60 hours of downtime per month**

### ANALYZE

- SharePoint environment
  - o How many farms
  - o Number of servers and locations
  - o Data under management
    - Per farm
    - Per site
  - o Use of RBS provider like Filestream
  - o RBS storage locations (file server, cloud, ...)
- Content
  - o Identify mission critical content  
Critical users: legal, executive, compliance
  - o What content is more important and why?
- Outage history and downtime
  - o Events
  - o Durations
  - o Impact
  - o Compare to any established SLA/RTO/RPO
  - o Are you meeting key objectives currently
- Support calls
  - o Quantity, types and time spent addressing

### DEFINE

- SharePoint service delivery goals
  - o Do you want to do granular recoveries
  - o Do you want to recover single sites
  - o Do you want end users to be able to do self-service recovery
- RPO
  - o Establish an achievable RPO
  - o Does RPO require changes to backup strategy and supporting technologies
  - o Use industry backup time benchmarks to justify and support chosen RPO
  - o Look at pros and cons of different backup approaches relative to goals
  - o Identify incremental cost if the organization wants better RPO
- RTO
  - o Establish an achievable RTO
  - o Is the RTO based on full, partial (mission critical sites only), or granular backup scenarios
  - o Identify if RTO(s) require new approaches or technology (i.e. – replication)
- SLA
  - o Determine target SLA based on organizational and IT goals
  - o Use outage history and downtime to determine historical SLA achieved
  - o Compare target and historical SLAs
  - o Look for events that can be mitigated with least incremental cost to deliver target SLA
- Identify scenarios and events to be covered
  - o Complete server failure
  - o SharePoint specific failures
- Identify out-of-scope events or scenarios
  - o These are purposefully excluded from SLA
  - o Can be too expensive to protect against based on frequency or risk
- What events or outages get me in the hot seat?

### SECURE

- Find an executive sponsor
  - o **This is absolutely critical**
  - o This is usually someone whose business unit or role strongly relies on SharePoint. Alternatively can be a senior tech exec
  - o Adds legitimacy to your efforts
  - o Helps align with overall business goals, secure budget
  - o Provides job and reputation protection if unforeseen events arise
- Secure support and agreement for RPO, RTO, & SLA
- Secure support for event exclusions

### PLAN

- Define ownership – needs to include formal acceptance and signoffs by key stake holders and executives
  - o Tasks & responsibilities
  - o Ensure anyone on a critical recovery path is aware of plan and their roles
- Farm specific meetings with local stake holders to identify issues, concerns & priorities
- Document processes for recovery and communication
- Map each potential scenario to a recovery path
- Publish SLAs

### TEST

- Run periodic recovery tests
- Are the backup files working as expected
- Can you restore a farm, site, or item
- Can you return service to people within your RTO

### REVISE

- Quarterly meetings with key stakeholders
- Ask "what has changed"
  - o DB size, permissions, content, new farms, ...
- Revisit SLAs: are they still valid and achievable