

# Update Schedule Questionnaire - SQLHA SAMPLE

Created by: Max Myrick  
Last Updated: April 23, 2019



Category	Questions to Ask	Responses and Notes
Hardware Updates	When does the fiscal year begin/end?	January 1st through December 31st
	Is the budget allocated annually, bi-annually, quarterly, or monthly?	Bi-annually. First half begins Jan 1st and second half begins July 1st.
	When do budget requests need to be submitted?	Yearly budget discussions begin in October and are finalized in December. Changes to second half budget are generally discussed in late May.
	When are approved budget requests normally submitted to HW vendors?	May be submitted mid-Jan, but early February is more common. Early July for second half.
	How will we gather performance usage and baseline data?	Reporting software provides monthly report. We augment this with data from SQL Server compiled quarterly by DBAs, and data from storage team.
	How will we estimate growth and plan for scalability?	Management provides a percentage based estimate for each division which we map to the various underlying databases to generate targets.
	How long does it normally take to build out or configure the HW?	Two weeks from final delivery of hardware.
	How long does the test cycle normally take?	Two weeks is normal, but an emergency push two day test pass is available.
Software Product Updates	Do we have a good list of all the products and versions we use?	The purchasing team maintains a list for licensing purposes which includes editions and versions.
	How will we handle security updates? (frequency, schedule, process, pre-production testing, etc.)	Monthly automated push from vendors.
	How will we handle patches and hotfixes?	Most patches are only deployed as needed. Windows Server patches are automatically applied from Microsoft as per security updates. SQL Server cumulative updates are applied twice per year proactively using the n-1 version.
	How will we handle service packs and other minor releases?	Done during the one quarterly "reboot" downtime each quarter. No more than 2 such updates in any quarter.
	How will we handle Major version upgrades?	Should be synched with hardware upgrades and refreshes; Not more than 1 per quarter.
	What are the product compatibility requirements of each product?	List maintained and checked by each team as part of quarterly upgrade planning session.
	When will we need to adjust our licensing for new versions or editions of the product?	Based on needs for upcoming features. Will be discussed at quarterly upgrade meeting at the team level.
Application Updates	What is the normal schedule for updates to our application? (frequency, process, etc.)	Weekly pushes from rapid development teams. Some major features pushed quarterly on a Wednesday separate from the quarterly software product upgrade window.
	What is the test schedule for different types of application updates?	Generally two days from application testing teams prior to rolling out on day three.
Business Requirements	What scheduled downtime do we have to work with?	One quarterly 15 minute downtime each quarter.
	How will we group various HW, software, and application updates together?	No more than 1 Major version upgrade or 2 smaller minor version upgrades per quarter. Major application updates are rolled out in months other than the quarter upgrade downtime.
	What are the testing requirements and limitations?	Automated test passes are available for both two-week and two-day test coverage. Any special testing should be discussed at the team level during the quarterly upgrade meeting.
	How will our high availability functionality be used to limit downtime?	
	What is our rollback plan if the upgrade has serious issues?	VM level backups are taken and available for any quarterly or major application update. Microsoft products will use uninstall procedures.

## Notes:

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Note: This is what needs to happen in each month in order to smoothly execute on the Sample Update Questionnaire.

Previous Year			Current Fiscal Year											
	November	December	January	February	March	April	May	June	July	August	September	October	November	December
<b>Hardware Updates</b>	Generate performance baselines and scalability assessment	Plan hardware spend based on scalability assessment and request pricing quote for approval. Check software product lifecycle and release changes.	Place hardware orders with vendors. Plan Major version upgrades for year. Plan service pack and minor upgrades for the first half of the year. Check all product compatibility and dependencies for this plan.		Build and test hardware when it arrives.		Generate performance baselines and scalability assessment. Think about what problems could be addressed if additional hardware budget becomes available.	Check for usable hardware budget and place orders	Place hardware orders with vendors		Build and test hardware when it arrives.		Generate performance baselines and scalability assessment	Plan hardware spend based on scalability assessment and request pricing quote for approval.
<b>Software Product Updates</b>	Monthly automatic security patching.	Monthly automatic security patching.	Monthly automatic security patching. Quarterly upgrade testing and signoff.	Monthly automatic security patching. Q1 Upgrade Window. Up to 2 service pack or minor product updates.	Monthly automatic security patching. Proactively apply SQL Server n-1 Cumulative Update.	Monthly automatic security patching. Quarterly upgrade testing and signoff.	Monthly automatic security patching. Q2 Upgrade Window. Up to 1 Major product version upgrade while moving to 1st half hardware upgrade.	Monthly automatic security patching.	Monthly automatic security patching. Quarterly upgrade testing and signoff.	Monthly automatic security patching. Q3 Upgrade Window. Up to 2 service pack or minor product updates.	Monthly automatic security patching. Proactively apply SQL Server n-1 Cumulative Update.	Monthly automatic security patching. Quarterly upgrade testing and signoff.	Monthly automatic security patching. Q4 Upgrade Window. Up to 1 Major product version upgrade while moving to 2nd half hardware upgrade.	Monthly automatic security patching.
<b>Application Updates</b>	4 weekly pushes (reduce if needed for company holidays). Reduce or delay as needed to allow stabilization and testing for Quarterly update.	4 weekly pushes (reduce if needed for company holidays)	4 weekly pushes (reduce if needed for company holidays)	4 weekly pushes (reduce if needed for company holidays). Reduce or delay as needed to allow stabilization and testing for Quarterly update.	4 weekly pushes (reduce if needed for company holidays)	4 weekly pushes (reduce if needed for company holidays). Provide test environment on any new systems to developers.	4 weekly pushes (reduce if needed for company holidays). Reduce or delay as needed to allow stabilization and testing for Quarterly update.	4 weekly pushes (reduce if needed for company holidays)	4 weekly pushes (reduce if needed for company holidays)	4 weekly pushes (reduce if needed for company holidays). Reduce or delay as needed to allow stabilization and testing for Quarterly update.	4 weekly pushes (reduce if needed for company holidays)	4 weekly pushes (reduce if needed for company holidays). Provide test environment on any new systems to developers.	4 weekly pushes (reduce if needed for company holidays). Reduce or delay as needed to allow stabilization and testing for Quarterly update.	4 weekly pushes (reduce if needed for company holidays)

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