Migration tool comparison

– metalogix vs sharegate

Our Perspective

**HCL Technologies**

**SharePoint Service Line – Modern Apps**

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# **Background**

With Microsoft keep moving towards newer versions of SharePoint like SP 2013 / SP 2016, we have seen many customers finding it difficult to successfully move from their current SharePoint version to newer versions. Especially when customers have very old versions like MOSS 2007 for which mainstream support is already expired as we prepare this document and extended support is due to expire by late 2017.

With our experience in migration especially using Metalogix and Sharegate, we would like to document the gist of these tools capabilities which will be useful across any SharePoint migration scenarios.

# **Typical Migration challenges**

It requires proper governance and planning to move content from SharePoint 2007 to SharePoint 2013 / Online effectively, accurately and timely fashion. Our service-line designed CAF framework caters to this need of proper governance of any SharePoint environment, which we have leveraged in many engagements. CAF provides various checklists, guideline documents around Governance, Information architecture and migration. Additionally, some of the current migration tools like Metalogix ControlPoint cater to governance aspects other than mere migration.

We do not have any direct ‘upgrade’ or ‘migration’ path to migrate from SharePoint 2007 to SharePoint 2013 as the database model that defines, manages and stores the content is substantively different for each system. As Microsoft does not provide any OOTB migration approach for this scenario, we have to depend on third party providers like Metalogix / Sharegate to do such migration.

As the SP 2013 page hierarchy is different than that of MOSS, migrating web pages and web parts through some lift-shift mechanism is not possible from SharePoint 2007 to SharePoint 2013. Also, typically Team Sites landing pages will have to be revisited to suit the new business needs and business policies.

Most of the cases, current hierarchy structure which existed in MOSS 2007 Team Sites will be not efficient, effective, practical or optimal. We will have to revisit site hierarchy and ensure that separate business areas like finance, legal and HR are split into separate databases and site collections. This exercise will also provide an opportunity to resolve database size issues and for removal of old contents no longer required.

The principal operational challenges are:

* Design new target site structure to meet new business needs but still ensure consistency across sites
* Identifying files to be migrated
* Detailed reporting
* Identifying owners/stakeholders for sites
* Getting consensus on application migrate/re-write
* Getting sign-off from stakeholders post migration

Migration tools cater to above challenges within their technical boundaries as most of the above challenges require frequent human invention. Such tools provide easy options to identify files / contents/sites which are not used for a given period of time and they also provide detailed pre and post migration reports.

We have overcome critical operational challenges with our in-house CAF framework and ADT (Application disposition tool). With ADT, we were able to automate most of the owner identification, decision on application disposition, decision on target platform. To give an example, we have used this tool across a large enterprise consisting of 18,000 LN databases and 500+ SharePoint sites targeted to SP 2013, with which the entire pre-migration process across the estate got completed within 2 months timeframe.

# **Technical challenges**

Based on our expertise in migrating from old versions of SharePoint (SPS 2003, MOSS 2007, SP 2010 and many other sources) to newer versions of SharePoint (SP 2013/SPO/O365), it’s quite possible to highlight top 10 technical challenges while doing such SharePoint upgrade/migration:

* Master Pages / page layout elements may have to be re-designed to fit in with new version
* Migrating external users
* Migrating and applying new permissions, while protecting information risk;
* Retaining original metadata
* Applying new metadata
* Migrating Workflows
* Custom webparts migration
* Migration performance – user throttling issues

## Ongoing management of SharePoint

While migration tools are generally directed to address migration, they often provide additional capabilities / features for continued use as management and reporting software.

Though SharePoint product itself has basic management and reporting features, but that’s not sufficient for large enterprise with many portals / users and high usage. Additional software is particularly beneficial when resolving content and security management problems across multiple SharePoint databases, collections and sites, which makes it easy to move content between different databases / locations without loss of metadata or security.

When we opt for a migration tool, it’s highly recommended to choose a tool which provides such long term system and service management capabilities for benefit of department records and information managers, content managers, system managers and system owners.

# **Metalogix vs Sharegate**

Considering above aspects, let’s compare Metalogix and Sharegate which are the two major players in SharePoint migration (esp. from MOSS to SP 2010 / 2013 / online).

|  |  |  |
| --- | --- | --- |
| Factor | Metalogix | Sharegate |
| Governance | \*\*\*\* | \*\* |
| Site Migration | \*\*\*\* | \*\*\* |
| Content Migration | \*\*\*\* | \*\*\*\* |
| Backup and restore | \*\*\*\* | \* |
| Remote BLOB | \*\*\*\* | \* |
| Migration Performance | \*\*\*\* | \*\*\* |
| Distributed Migration | \*\*\*\* | \* |
| Keep current farm running | \*\*\*\* | \*\*\* |
| Clean before migration | \*\*\*\* | \*\*\*\* |
| Externalize BLOBs before Migration | \*\*\*\* | \* |
| Re-arrange pre / post migration | \*\*\*\* | \*\*\* |
| No Server side install | \*\*\* | \*\*\*\* |
| Split / merge Lists | \*\*\*\* | \*\*\*\* |
| Migrate Nintex workflows | \*\*\*\* | \*\*\* ^ |
| Advanced capabilities like search, choose number of versions | \*\*\*\* | \*\*\* |
| Powershell support | \*\*\*\* | \*\*\*  |
| Security Mgmt.  | \*\*\*\* | \*\*\*  |
| Pre-migration reports | \*\*\*\* | \*\*\*\* |
| Licensing option – per server basis (irrespective of no. of users) | \*\*\*\* | X |
| O365 support | \*\*\*\* | \*\*\*\* |
| File share Support | \*\*\*\* | \*\*\*\* |
| Other source systems like eRoom/wiki/Blogs support | \*\*\*\* | \*\*\* |

^ - available only in Sharegate for Nintex version.
X – not present in Sharegate

\*-rating based on our migration experience in large engagements

Both Metalogix and Sharegate go hand-in-hand when comparing different aspects of migration. Metalogix is slightly on upper hand against Sharegate while dealing with governance aspects, Remote Blobs, distributed migration, robust powershell capability, advanced migration aspects and flexible licensing options.

# Governance

Metalogix provides a tool suite to manage and migrate SharePoint farms. By partnering with one product vendor like Metalogix, we can get single point support for both SharePoint governance and migration. Metalogix ControlPoint provides many administrative and governance features to prevent SharePoint data breaches, to take action on sensitive content, to ensure confidentiality policy compliance and to respond to audit requests within short period of time.

Though Sharegate has options to capture governance policies, it lacks robust preventive mechanism as ControlPoint.

Leveraging ControlPoint we were able to prevent significant P1 issues at production environment for few of our customers who have large SharePoint farms spanning multiple regions with tens of thousands of users.

# Site Migration

Most of the site elements can be moved through Metalogix by simple user interface like Copy and paste. It gives various options to copy / paste all site content, all subsites, content types, groups, alerts, site navigation, users, taxonomy stores, permissions and permission levels.

We have significantly used Metalogix to migrate sites from various versions to SP 2013 / SPO. With the help of Live Compare, copy site, migrate site collection through paste special options, it was pretty easy to migrate sites for even a novice to migrate with simple clicks. We were able to successfully move around 1200+ sites with 60% of them using OOTB templates and 20-25% of the sites were based on custom templates which would migrate with the help of powershell scripts and remapping with new OOTB features of SP 2013. Remaining 15-20% of the sites required redesign, where-in the contents got migrated using Metalogix. We had significantly less issues while migrating sites using Metalogix than any other tool.

Sharegate is also equally good in site migration, but Metalogix UI options are very flexible and easy to use. Also, accuracy of migrated contents is much better in Metalogix compared to Sharegate, which is subjective though (varies from customer to customer by different scenarios).

Promoting, splitting and grouping, re-arranging of sites are possible in both tools.

# Content Migration

Both Metalogix and Sharegate provides options to migrate content of a site / list/ library with various options like full migrate, partial/selective migration along with preserving created/modified information, preserving document properties/metadata, preserving approval status etc.

Both tools provide options to split a list, group two lists into one, re-arranging of lists. Metalogix provides option to choose how many versions of a file to be migrated.

Through Content matrix migration engine we can include customized migration features specific to a scenario / customer and re-use it throughout the migration flow.

We have significantly used Metalogix to migrate sites in various engagements. We have migrated volumes of content ranging from 100GB to 600+ GB of contents from MOSS/SP 2010 to SP 2013/SPO. We used to get issues with migrating custom permission sets, checked-out items. We have sorted out such issues along with Metalogix support team and gained experience in resolving them. As a best practice, we ran reports to identify checked-out items and ensure to check-in such items.

# Migration performance

We had challenges while moving from MOSS to SPO for one of our customers. We worked jointly with Metalogix to resolve such migration issues. Based on that experience in Metalogix Content Matrix 8.1.0.3, we could identify that Metalogix has lot of flexible features to support SPO migration at faster pace. Based on the support team guidance, we could leverage following features to successfully migrate from MOSS to SPO with less user throttling issues:

* Distributed Migration – Use a mechanism of Controller and agent kind of setup to distribute the migration load
* New API using SPO container upload – a very new and robust approach to leverage SPO capabilities
* Automated Powershell based migration - better, quicker and powerful way to migrate than going through Manual / UI based migration

With the help of re-usable migration tasks, we could save lot of time by re-using the same tasks/job across environments/site collections/sites instead of creating the same tasks/job again. Configuration parameters which change for each region are also very easy to change directly within the UI itself.

Sharegate can be installed at client side itself with no patch/service at source/target, which is convenient on one side (from IT security policies perspective), but it incurs additional delay to connect to source/target server. Metalogix provides similar options of ‘No server side’ install like Content Matrix migration Express but also provides options to install some plug-ins at source/target side to act as an proxy to the tool – significantly rendering quick results for pre-migration and post migration analysis and for quicker migration as well.

# Nintex workflows

We have realized lot of flexibility to migrate Nintex workflows through Metalogix. We have options to associate Nintex Databases directly to a site or site collection. We have options to connect with multiple Nintex databases which is helpful for migration specialists. We were able to ensure proper migration of workflows along with status by leveraging advanced settings like Preserving workflow association with list/content types and preserving workflow instance status during the time of migration.

Through our interaction with Metalogix Support team, we understood that Nintex product team has collectively worked along with Metalogix team to migrate Nintex workflows as Metalogix was only of the early birds to migrate Nintex workflows.

Most of the times, Nintex workflows got migrated through Content Matrix, but rarely we were forced to re-create the workflow which involved complex state transitions.

# Licensing options

Metalogix has got flexible licensing options unlike Sharegate. We can opt for WFE server based license irrespective of users or workstation based licensing option. Sharegate licensing model would suite for small organizations where number of users / migration specialists are less. By limiting number of users, we are indirectly limiting number of parallel migration threads / process. And this license per user is per year which has to be renewed for each year. Even if a business user / client tech. team wants to migrate a site / directory by accessing the tool with few clicks, we need to purchase license for that user.

Metalogix is suitable for larger organizations where volume of sites/content are huge and more of users are required to use the migration tool. With the option of server (WFE) based license, all users can access the unlimited features of Metalogix. With simple to use UI options (like copy/paste) any authorized user /owner can move his/her contents with no Admin/expert support.

# Backup and Restore

We have leveraged Metalogix backup mgmt. features to backup anything and everything related to SharePoint farm – full farm, Root (hive), IIS configurations, Certificate stores, GAC, .Net framework files. This has played a significant role when we were forced to restore an entire farm for one of our customers. Having done backup of all supporting elements of a farm, we were able to quickly restore the farm in full form with no dependency on respective Admins (site / IIS). Important aspect is that we were able to bring back the farm with no configuration issues. This is really critical to maintain our SLAs and to RTB with very trivial impact to end users when something goes wrong.

# Remote BLOB

Content Matrix has the capability to reduce SQL DB (storage) cost and boost up migration speed using RBS (Remote BLOB Storage) technology. The majority of the data associated with a file can be transparently offloaded to cheaper storage freeing up SQL resources without impacting the user experience. The migration path / steps are almost similar to moving contents to target site, except selecting Metalogix Storage Point endpoint. This option would reduce SQL server cost significantly in large farm setup where SQL servers counts to more than 5 servers. To leverage this feature, we need to procure Metalogix Storage Point in addition to Content Matrix.

# **Conclusion**

Both Metalogix and Sharegate are leading market players in Migration, especially around SharePoint. But Metalogix seems to be a better choice for an organization as it provides in-depth feature aspects and gives flexibility to restructure at source/target and during migration within Metalogix UI itself. Also, with its suite of options we can do proper governance, define and implement robust backup/restore process. Metalogix can also be a one-stop product to move content from various sources like Wikis/blogs / eRoom/File share to ODFB / SPO / SharePoint on-prem with just one hop (without having any intermediate stages). Metalogix provides a detailed set of options to improve migration performance especially to move to SharePoint online setting new trends to move to cloud at faster pace.

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