

Reduce Costs and Improve Productivity by Moving Content from Oracle ECM (Stellent) to SharePoint



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ABSTRACT

Having passed 100 million users and \$1 billion USD in revenue in 2009, SharePoint is now a ubiquitous part of the enterprise content management (ECM) landscape for corporate enterprises and other organizations. While almost every organization has SharePoint, many do not yet have the product deployed to its full potential. This is especially true in environments that have historically relied on other document and content management tools, such as Oracle Content Server (formerly known as Stellent).

This white paper describes the cost savings and productivity gains that can be achieved by existing Stellent or Oracle Content Server customers who choose to consolidate content to SharePoint.

SHAREPOINT: ADOPTION THROUGH USABILITY

ECM tools exist to manage information but true productivity gains can only be achieved when business users adopt an ECM system and integrate it into their daily work. SharePoint's success is partly attributable to the ease with which business users adopt the product. SharePoint's easy-to-use site and folder structures, rich collaboration feature set and customizability encourage its adoption as the default tool for corporate content management. Adoption enables higher overall productivity, in turn, all without requiring large investments in training.

Stellent, by contrast, is noted for being difficult to use and customize for an organization's specific needs. For example, the content check-in process is lengthy, the security model is non-intuitive and out-of-the-box deployments lack several standard collaboration features such as calendars, blogs and wikis. This deficient feature set creates an obstacle to adoption within the organization and consequently minimizes the productivity improvements that can be gained by deploying and maintaining a Stellent environment.

In short, given the choice of SharePoint and Stellent platforms, most business users will adopt SharePoint as the path of least resistance for achieving their content management and collaboration goals. The question asked in many organizations where Stellent is deployed is: "How do I bridge content to a new or existing SharePoint deployment without losing our already-massive investment in legacy content?"

THE MAJOR IMPROVEMENT

ECM tools exist to manage information and make information workers more productive. If business users don't like an ECM tool or find it difficult to use, they won't put their content into it. Instead, they'll keep it in their email or on their shared drives. Worse, they'll put it on their personal USB sticks. The repercussions of fractured information management are significant:

- ▶ End users cannot find the information they need in a timely fashion
- ▶ Compliance with industry or corporate and retention requirements becomes impractical
- ▶ Collaboration among subject matter experts and across business units declines
- ▶ IT infrastructure is not used efficiently

SharePoint's success is widely attributed to its high end-user adoption rates. Its use of traditional shared-drive-like folder structures for storing documents, along with simple and flexible access control and popular web 2.0 features, make it easy and attractive for business users to put content into it. That increases adoption rates and generates much higher overall productivity.

Stellent, to the contrary, is notorious for its cumbersome check-in process, non-intuitive security model and nearly total lack of web 2.0 and modern collaboration features. This hinders both productivity and its overall rate of adoption within the organization.

After seeing the new, intuitive and streamlined SharePoint, business people become reluctant to go back.

PRESERVING YOUR INVESTMENT AND CONTENT

You can stop this process before it starts and gain ground instead of losing it. Subsequent sections provide reasons to switch to SharePoint and when you will benefit from the change. They answer the questions:

- ▶ Why migrate from Oracle ECM?
- ▶ How much will I save each month?
- ▶ How much does Oracle ECM really cost my organization?

The savings can be significant: you can reclaim hundreds of thousands of dollars on license fees alone. Migration can be easier than anticipated with good software that delivers safe, fast and traceable migrations with almost no risk and no downtime.

BACKGROUND

In 2006, Oracle acquired Stellant, Inc., a global provider of ECM solutions. Stellant was founded in 1988¹ and had about 1,500 customers at the time of the acquisition.

Oracle ECM is not a single product but rather a wide offering that includes five groups of products. While some of them will match what you need to accomplish, others will provide more functionality than you need. Complex and non-intuitive features causes employees to lose overall productivity.

Consider this example: If you need a car to drive your kids to school and get groceries, but you don't want to get stuck in a snowstorm, would you purchase an SUV or an armored military all-terrain vehicle? An SUV would be the better choice because a military vehicle would cost too much, not to mention the mileage and the price of gas. Worse, it's noisy, uncomfortable and too big to park.

In the same way, some Oracle products will be just right for what you're trying to do and some will be too much.

Let's look at Oracle ECM—product by product:

1. The Enterprise Content Management (ECM) suite provides basic document management. If you need to replace your shared drive with something that has revisions, better access control and workflow, ECM is the tool you use.

¹As per <http://solutions.oracle.com/partners/stellent>

2. Web Content Management (WCM) gives you web publishing. It's an add-on module that goes on top of ECM.
3. Universal Records Management (URM) allows you to control retention and disposition of sensitive content that requires life-cycle management and long-term preservation. It has industrial strength and is compliant with DOD 5015.2.
4. Oracle Imaging and Process Management (IPM) captures images via Oracle Document Capture and Oracle Distributed Document Capture, annotation and mark-up of images, routing and approvals. Consider it for high-volume applications that involve billions of items.
5. Information Rights Management (IRM) encrypts and secures sensitive content that resides outside the repository, both inside and outside the firewall.

Most Stellent customers only use ECM and WCM and sacrifice their organizational efficiency and overall ROI on ECM implementation by doing so. Why?

Unless you're really using advanced Oracle ECM features—like dynamic conversion of document formats or content folios—you're missing a host of critical productivity features. Worse, by staying with Oracle ECM, you're likely overpaying by hundreds of thousands of dollars.

HOW MUCH DOES IT REALLY COST TO KEEP YOUR CONTENT IN ORACLE ECM?

This section is not about the cost of Oracle ECM licenses. (Those prices are listed in the next section.) Here we detail the costs that most organizations overlook—and may be shocked to discover.

- ▶ **Cost of hardware:** You may owe \$841,800.00 every time you add another server to increase capacity

When users complain about ECM being slow, you typically add horsepower. When the servers are maxed on RAM and CPU, however, you have to add more content servers to the farm. A new server requires additional licenses: software and annual support for a four-processor machine with ECM Suite and the CPU licensing model will cost \$841,800 in the first year².

- ▶ **Cost of complexity**

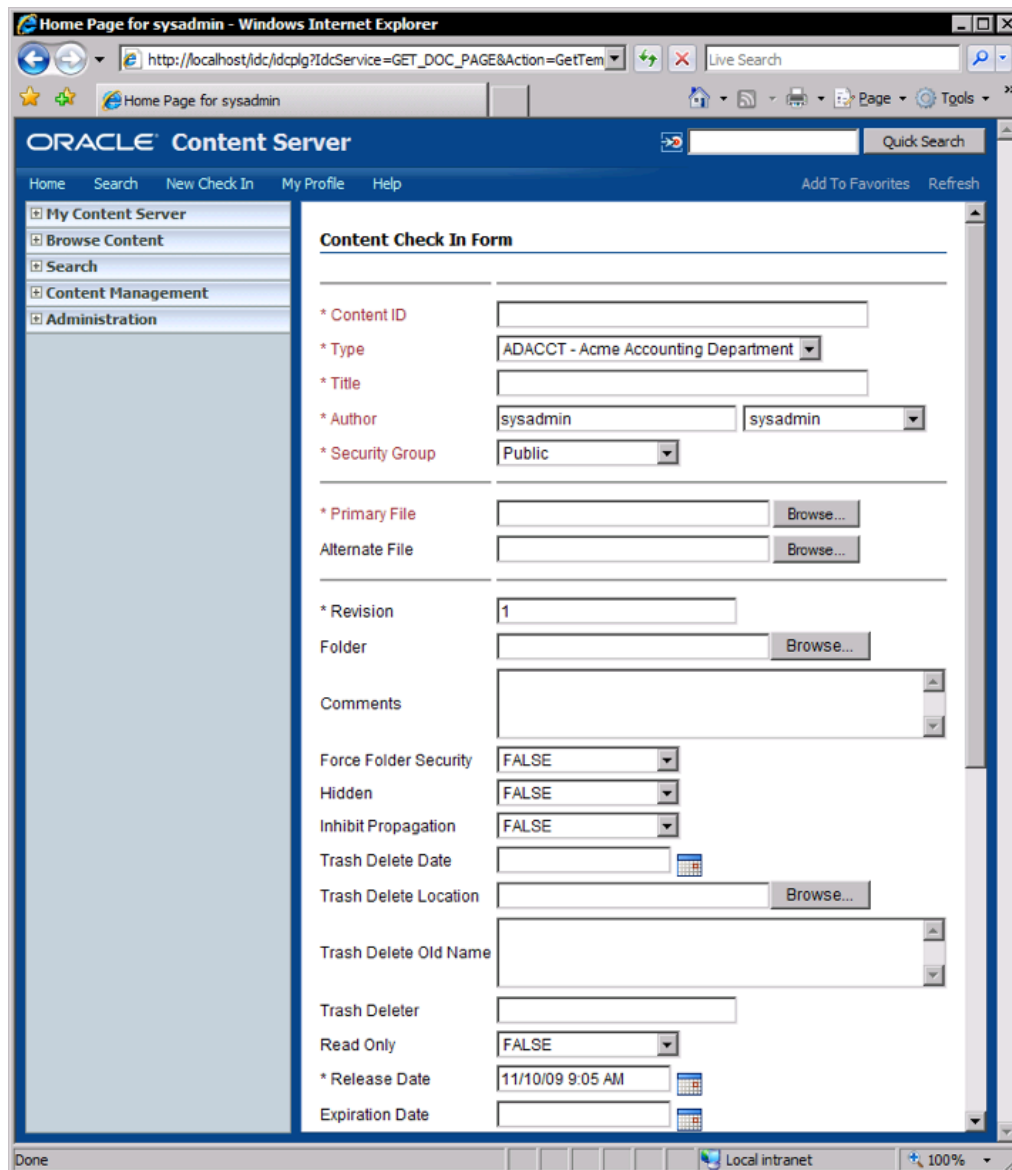
Stellent is not a typical database that any DBA who knows SQL can get running and learn to maintain in a week. Stellent is different and it's complex. Some things are not intuitive, like "virtual folders." Some terminology is confusing: the term "group," for example, has nothing to do with Windows or Unix user groups. "Account" in Stellent is not a user account.

Most business users need up to four two-hour meetings to get a basic understanding of how ECM permissions work and how to give people the necessary access. That means training a lot of people – or employing expert consultants for a long time.

² Based on Oracle Software Investment Guide, Oct 15, 2009

► Cost of data integrity problems

The complex, non-intuitive nature of many Oracle ECM deployments inhibits users from being involved and contributes to project failure. Stellent is known for its lengthy, unwieldy check-in form, which is over a page long and filled with confusing input fields. A failed ECM rollout is not the worst that can happen, however: data integrity problems can be even more damaging.



Customizing the system and adding metadata fields makes the form even longer. That frustrates end-users when they have to fill it in and they start entering garbage into the required fields just to get through the process. Or they stop checking content in at all.

Once garbage gets into the system it opens a sure path to an expensive manual cleansing and matching project. Even that process cannot recover knowledge lost when the content was not checked in, however.

Many administrators simplify content check-in by letting their users drag and drop new content from their Windows Explorer. When that happens, however, no metadata values are entered, reducing the Oracle ECM to a version-enabled shared drive. Its functionality now is equivalent to that of a free, open-source, version-control system such as SubVersion or CVS – and the organization has overpaid by several million dollars on ECM licenses and consulting.

▶ Costs of Training

The choices for training are also limited as Oracle ECM has no technical introduction books and there are virtually no free online articles to read. The product does come with 92 300-page manuals (27,600 pages) that organizations find confusing and intimidating. Few IT staffers have the time to read this much documentation.

Official training costs \$700 per day per person and getting technology personnel up to speed on a typical ECM deployment requires two five-day courses. Another major expense to consider is the cost of taking these people off the project for 10 days.

▶ Costs of Consulting Services

Almost every Stellent implementation begins with Oracle Consulting Services, but the costs of consulting services are often greater than simply the hourly rate multiplied by the number of hours. Oracle ECM customers complain that consultants are reluctant to share knowledge – they are not eager to educate the client's full-time staff.

Consultants also leverage the product's complexity. High fees—up to \$300/hr plus travel and lodging—and the small number of clients motivate many to hold on to their clients for life. Clients get less than optimal results with this approach.

▶ The cost of keeping up multiple ECM systems

Even if your organization already has SharePoint, a good chunk of content may still be in Stellent. There are several good reasons to seriously consider bringing the content over to SharePoint – and doing it sooner, rather than later.

Organizations invest in Content Management solutions like Stellent and SharePoint to help employees improve how they manage their content. That means finding content faster, sharing large documents instead of printing or emailing them, automating workflows, and collaborating on documents. Employees can't really do that when content is scattered across multiple systems. Instead:

- ▶ They'll search for documents in several places.
- ▶ They'll think about where to put a document they were going to share online—and then email it.
- ▶ They'll call or email each other for approvals instead of using an automated workflow.

When users try to replicate content across multiple systems, the picture gets even worse. One of the copies will become outdated very quickly and that can pose serious threats to employees working with that information. For example: A semiconductor plant manufactured the wrong chips when engineers worked off an outdated specification.

THREE MAJOR BENEFITS SHAREPOINT OFFERS TO STELLENT CUSTOMERS

Here are the top three benefits of SharePoint functionality that maximizes cost savings and improves efficiency for Stellent customers:

#1: FUNCTIONALITY NOT PRESENT ORACLE ECM

Stellent lacks many recent web collaboration features that business users demand:

- ▶ **There are no robust, fully featured blogs or mysites.** Many companies miss out on this effective form of social communication and knowledge sharing. Mysites enable users to aggregate and share useful data about their expertise and current priorities as well as information from other line-of-business systems.
- ▶ **There are no fully featured Wikis.** Wiki enables your teams to gather their internal knowledge in one central, easily manageable space. It's a good mechanism for building project documentation or collaborating on a document. It's also an easy way to tap your organization's collective mind for everyone's benefit. Just like blogs, however, Wikis are technically included with Oracle but people don't want to use them because features are missing and they're hard to use. Wikis and blogs are demo components that are not supported in Stellent.
- ▶ **Online discussions are supported in Oracle--but they are not user friendly until you invest in customization.** To get to an online discussion, you have to find a content item first because discussions are attached to content items. Most users find that approach confusing.
- ▶ **Online surveys are absent altogether.** There is no way to ask a question online and there are no product feedback questionnaires or employee surveys. You either have to customize or use third-party products.
- ▶ **Image libraries are not available out of the box.** This means you're lacking an important tool to bring employees back to the site. The more time they spend online, using the tool, the more knowledge they contribute and the more your organization gains in cost savings and productivity.
- ▶ **You can't get RSS feeds out of the box.** If you want them you have to pay consulting services to customize Oracle ECM. Without RSS feeds, customers and employees won't keep up to date on what you have to offer.

By contrast, all of these features come standard in SharePoint 2007 or SharePoint 2010. In fact, you get them for free. Online collaboration is part of Windows SharePoint Services 3.0 (WSS) and SharePoint Foundation 2010 and it's free with a license for a Windows Server.

THE DANGER OF EXTENSIVE CUSTOMIZATION

Clients that make a large investment in customizations must be prepared to have them all revised when a new version of Content Server comes out. Components may stop working.

Stellent works with a number of different databases, but it's an Oracle product now. Clients who don't have their ECM data in Oracle Database yet must consider switching.

#2: GLOBAL MARKETPLACE LEADERSHIP

According to Microsoft, SharePoint passed 100 million users in 2009. A user population of that size makes SharePoint a global leader in the ECM marketplace. It's often wise to go with the leader because they make the most money and the largest investments in client support and product development. They have the best features and, with extensive investment in development, are constantly introducing new features.

#3: ORACLE ECM AND MICROSOFT SHAREPOINT PRICING MODELS

Let's find out how much you will save by moving your data from Oracle ECM to SharePoint.

ORACLE ECM PRICING

The Enterprise Content Management Suite costs \$172,500 per CPU plus \$37,950 per CPU for support. Use this quick tool to calculate your own Oracle ECM costs:

(This worksheet is based on Oracle Software Investment Guide, Oct 15, 2009 and is designed as estimate only. For actual costs and discounts, contact an Oracle sales representative.)

NAMED USER LICENSES

Server Name	ECM Product	# of Users	Cost per User	License cost (one time)	Updates and Support Cost per User	Updates and Support total/ annual
Prod Contribution 1	Universal Content Management	150	\$2,300	\$345,000	\$506	\$75,900
S A M P L E						
Total License Fees				\$345,000	Total Support:	\$75,900
Grand Total for Year 1 (License and Support)				\$420,900		

CPU MODEL WITH NO USER LICENSES

Server Name	ECM Product	# of CPU x # of Cores	CPU Core Factor	# of CPUs for licensing	Cost per CPU	License cost (one time)	Updates and Support Cost per CPU	Updates and Support total/ annual
Prod Contribution 1	ECM Suite	4 x 2	0.5	4	\$172,500	\$690,000	\$37,950	\$151,800
S A M P L E								
Total License Fees						\$690,000	Total Support:	\$151,800
Grand Total for Year 1 (License and Support)						\$841,800		

MICROSOFT SHAREPOINT PRICING

The most expensive option—Office SharePoint Server 2007 for Internet Sites—costs \$41,134, **regardless of how many CPUs you plan to have on that server**. Support is \$20,282 a year **per server**, not per CPU.

MIGRATING ORACLE ECM CONTENT TO SHAREPOINT

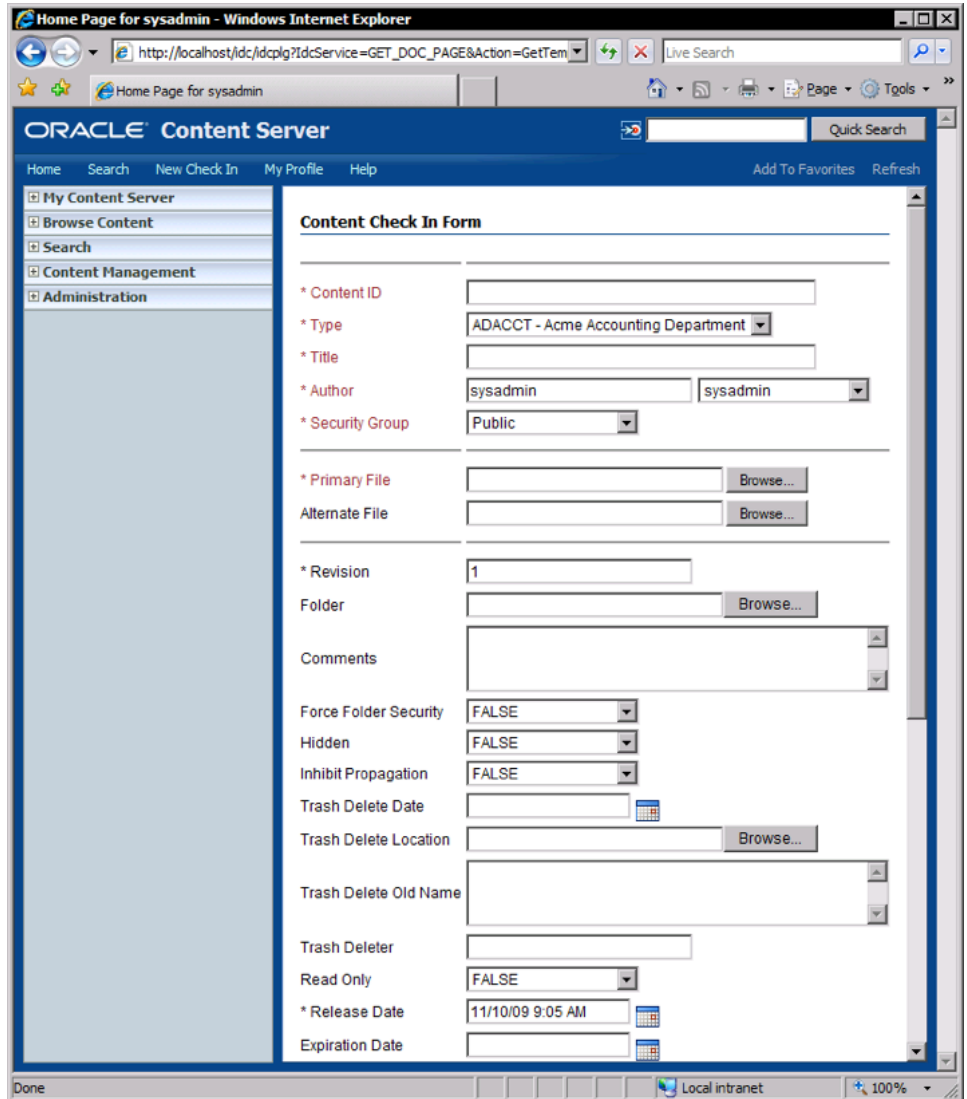
A full or partial switch to SharePoint requires a content migration. The main challenge organizations face here is how to migrate ALL of the existing Oracle ECM content to SharePoint safely and easily.

MANUAL MIGRATION AS A BASELINE FOR FUNCTIONALITY

Migrating a few pieces of content by hand will clarify what we should expect of a good migration tool.

Migrate content revisions

1. Begin by selecting a content item to migrate. Bring up its Content Info screen:



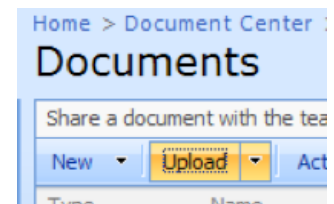
The screenshot shows three revisions but we only want to migrate revisions 2 and 3. Begin with the older revision first. Select Revision 2:

Revision	
3	11/8
[2]	11/8
1	11/8

2. Download the Native File.
3. Now you can check it into SharePoint.

In your document library click the “Upload” button:


Pick up the Native File you saved on Step 2 and click OK



4. Fill in the metadata values and complete check in:

Home > Document Center > Documents > Eagle - Project Plan > Edit Item

Documents: Eagle - Project Plan

 The document was uploaded successfully and is checked out to you. You must fill out any required properties and check it in before other users will be able to access it.

| * indicates a required field

Name *	<input type="text" value="Eagle - Project Plan"/> .doc
Title	<input type="text"/>

Version: 0.1
 Created at 11/11/2009 11:11 AM by LitwareInc Administrator
 Last modified at 11/11/2009 11:11 AM by LitwareInc Administrator

5. Go back to Oracle ECM. Select Revision 3.
6. Repeat steps 2 through 4 to add the revision to our document.

That's a lot of work: two minutes per revision – and some content items have a lot of revisions:

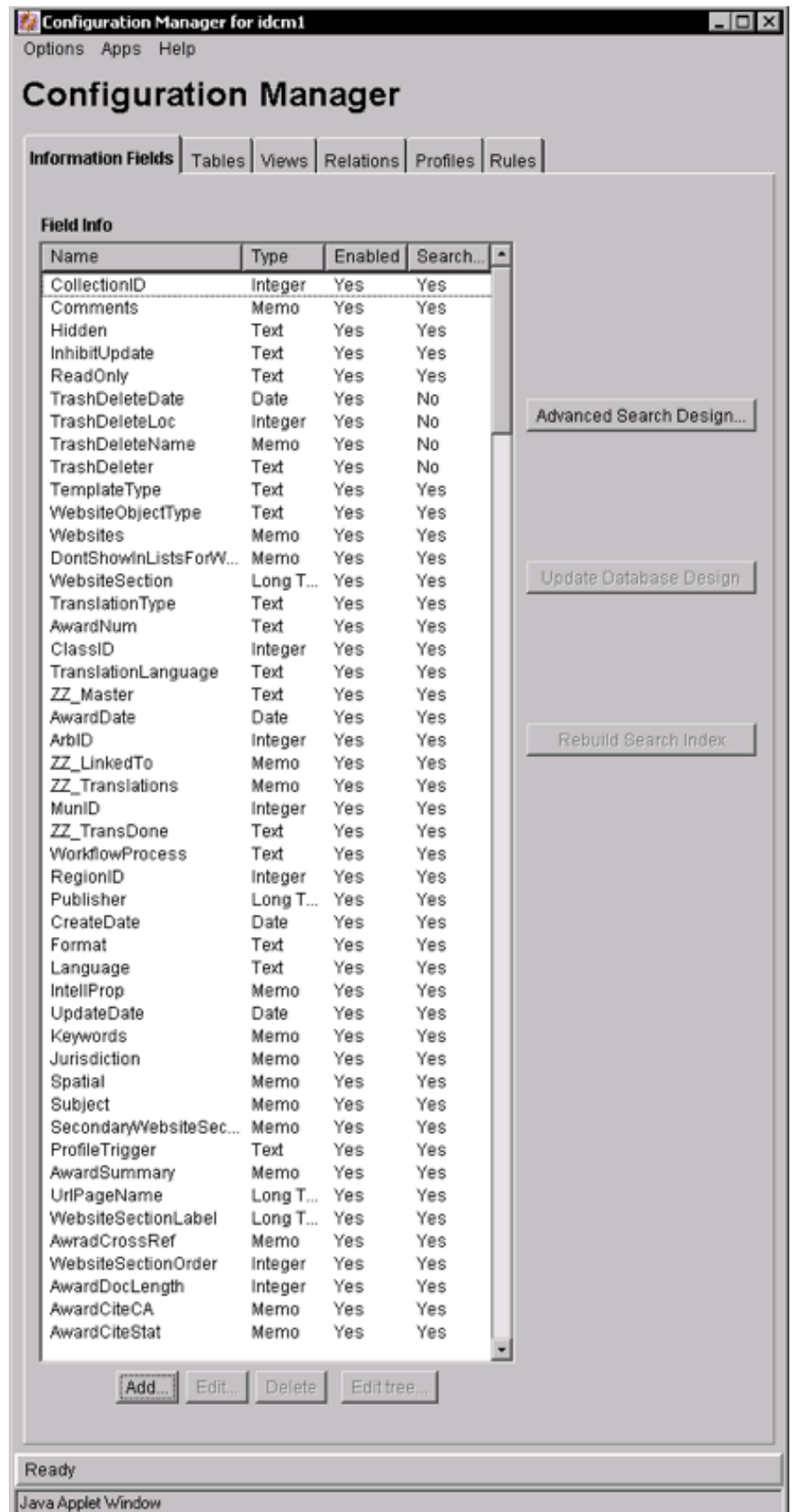
Revision History

Revision	Release Date	Expiration Date	Status	Actions
[104]	11/7/07 11:56 AM	None	Released	Delete
103	11/7/07 11:52 AM	None	Released	Delete
102	10/17/07 3:57 PM	None	Released	Delete
101	10/17/07 3:47 PM	None	Released	Delete
100	10/17/07 1:07 PM	None	Released	Delete
99	10/17/07 12:57 PM	None	Released	Delete
98	10/17/07 12:47 PM	None	Released	Delete
97	10/17/07 12:37 PM	None	Released	Delete
96	10/17/07 12:26 PM	None	Released	Delete
95	10/17/07 12:16 PM	None	Released	Delete
94	10/4/07 2:55 PM	None	Released	Delete
93	10/4/07 2:45 PM	None	Released	Delete
92	10/4/07 2:35 PM	None	Released	Delete
91	10/4/07 2:25 PM	None	Released	Delete
90	10/4/07 2:15 PM	None	Released	Delete
89	10/4/07 1:55 PM	None	Released	Delete
88	10/3/07 3:34 PM	None	Released	Delete
87	10/3/07 3:24 PM	None	Released	Delete
86	10/3/07 3:14 PM	None	Released	Delete
85	10/2/07 3:23 PM	None	Released	Delete
84	10/2/07 1:53 PM	None	Released	Delete
83	10/2/07 1:43 PM	None	Released	Delete
82	9/25/07 4:25 PM	None	Released	Delete

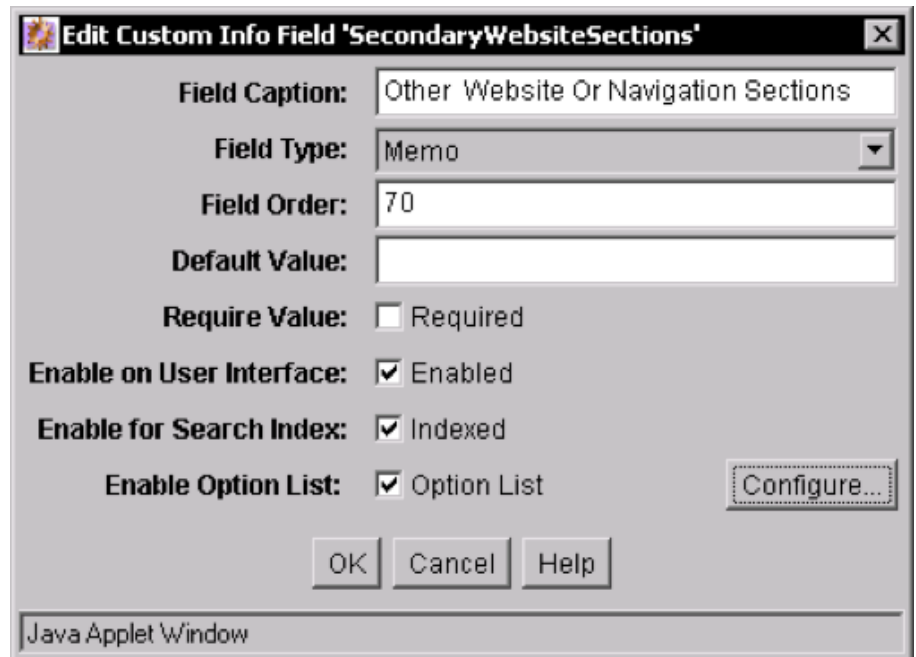
Migrate Metadata

Now let's look at migrating Metadata

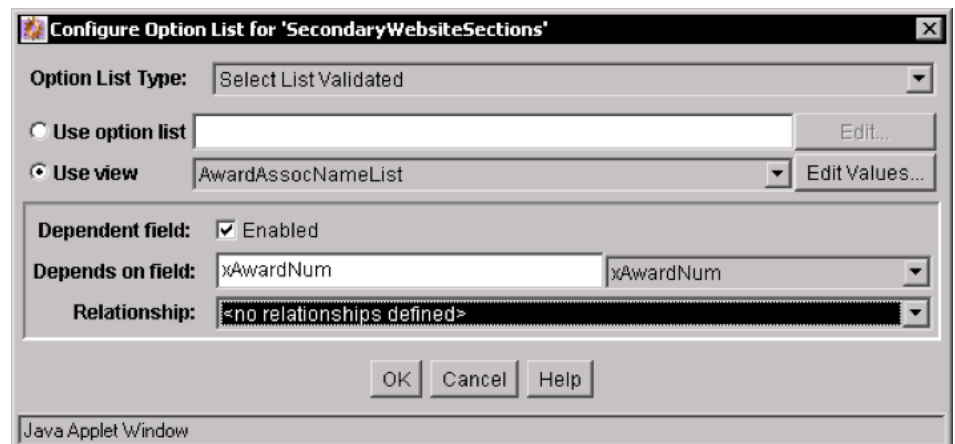
1. Begin by bringing up Configuration Manager:



2. Select a metadata field and click “Edit.” The Edit Custom Info Field box comes up:



3. If this field has a list of values, click the Configure button next to the Enable Option List checkbox in the bottom:



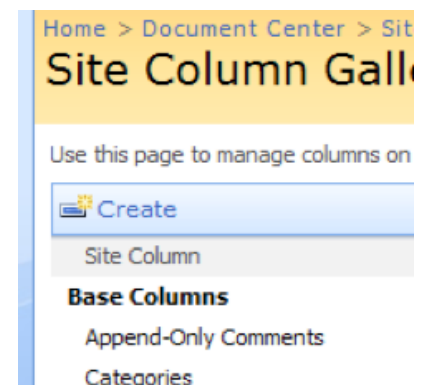
Click Edit Values to get the list values out.

4. In your SharePoint System, go to Site Actions > Site Settings.

Under Galleries, select Site Columns.

Click Create

5. Pick the type of the field you’re going to create



Home > Document Center > Site Settings > Site Column Gallery > Create Column

New Site Column: Document Center

Use this page to add a site column.

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

SecondaryWebsiteSections

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- Full HTML content with formatting and constraints for publishing
- Image with formatting and constraints for publishing
- Hyperlink with formatting and constraints for publishing
- Summary Links data

6. Move over additional information, such as Validation and Option List values

This is only an example, but migrating anything over a few dozen content items and metadata fields by hand is simply not realistic. The next section explores the options for automating this process.

CUSTOM PROGRAMMING

Both Stellent and SharePoint offer a flexible Web Services API and it seems relatively straightforward to write a migration application that moves the content across.

Writing a migration app from scratch is a tedious task, however. If you go through a detailed estimating exercise, it will come down to a six-month project for a team of at least three developers. Remember, you'll need Oracle ECM and SharePoint experts and they charge a high rate for their knowledge. If you are fortunate enough to recruit them at \$70/hr, (after the agency markup, more like \$100/hr) the project will cost you about \$300,000.

If you choose Oracle Consulting services, prepare to triple the price. Fortunately, you have a third choice, an off-the-shelf migration tool that is readily available.

AUTOMATED MIGRATION

This section explores what's involved in using such a tool for a completely automated migration. First, selecting the right tool is critically important because it has enormous implications for the project's outcome.

For example, this organization selected a tool that was not designed to handle folder structures properly.

The tool moved parts of their file plan to the wrong places. Their testing team missed this problem because small things are easy to miss in a complex data model. Their business users began to use SharePoint and it took them a month to discover the problem. By then, it was too late to wipe the new system clean and bring Stellent data over again. The organization is now in line for a manual cleansing and matching.

Companies that moved or are planning to move from Stellent to SharePoint have identified seven critical features that they expected from a useful migration tool. These seven features protect you from the expensive situation we just described.

SEVEN THINGS A MIGRATION TOOL MUST HAVE TO PREVENT MIGRATION PROJECT DISASTERS:

- 1. It must be easy to use and have an intuitive interface.** The tool must be easy to use. When migrating extensive folder structures, the command-line tools and tools that lack an easy-to-use, drag-and-drop user interface are not adequate to the task. It's easy to make a mistake and those errors can be very expensive later on.
- 2. It must migrate Stellent revisions to SharePoint versions.** If the tool cannot do this, the history and all audit trail data will be lost in migration. There will be no information on who did what with the document and when.
- 3. Must reproduce Stellent folder structure as SharePoint site structure.** Content folders and a file plan are major information assets. Without them, information has no structure—and thus very little value.
- 4. Must preserve metadata during migrations.** When metadata is lost, a content management system is reduced to a version-enabled shared drive. Metadata represents a major part of business value.
- 5. Must map permissions to SharePoint.** If the tool doesn't bring across content permissions, all sensitive data will be open and insecure as soon as the migration is complete. This may be acceptable when migrating only a hundred items because permissions can be reset by hand. But if you have to do that on hundreds of items, the cost of migration will skyrocket and data quality will plunge.
- 6. Must let you pick and chose what to migrate.** This is very important because:
 - ▶ It will save your users time when searching in the new SharePoint system because they won't have to sift through outdated and invalid content.
 - ▶ It will save space in the new system.
 - ▶ It will save time on the migration itself. Eliminating outdated content can take hours off every test run that's done before the actual migration.

You should also be able to alter the file plan, re-organize content as you migrate, promote folders to higher-level sites and split or merge folders.

7. It should migrate discussions.

The tool must do this, because it's impractical to migrate discussions by hand. It must also preserve the links between a document in Content Server and its discussion—and move it to SharePoint this way. Otherwise, there is no way to tell the subject of the discussion.

METALOGIX MIGRATION MANAGER FOR STELLENT: HOW DOES IT MEASURE UP?

1. Easy, intuitive interface	Migration Manager for <u>Stellent</u> has a familiar, tree-based, copy-and-paste style user interface that is similar to the Windows File Explorer. It's so easy you can begin migrating content within minutes.
2. Migrate <u>Stellent</u> revisions to SharePoint versions	Converts all <u>Stellent</u> version histories to SharePoint version histories for migrated content.
3. Reproduce <u>Stellent</u> folder structure as SharePoint site structure	<u>Stellent</u> and SharePoint use different containership concepts. Migration Manager can convert folder structures in <u>Stellent</u> into a SharePoint Site hierarchy
4. Preserve metadata as you migrate	Preserves all views, version chains, metadata, permissions, and authorship information.
5. Map permissions to SharePoint	Maps and migrates all <u>Stellent</u> users and permissions to SharePoint using either default or customized mappings.
6. Choose what to migrate	Migrates all types of <u>Stellent</u> content objects: Discussions, revisions, <u>Stellent</u> Users, metadata, customizations, and <u>Stellent</u> Roles. Offers the option to migrate only the most recent version of each <u>Stellent</u> item.
7. Migrate discussions	<u>Migrates <u>Stellent</u> discussions.</u>

WHAT MAKES METALOGIX MIGRATION MANAGER FOR SHAREPOINT – STELLENT EDITION DIFFERENT?

Metalogix Migration Manager for SharePoint – Stellent Edition is an easy-to-use and convenient way of moving your Stellent data to SharePoint. It gives you a superior solution to the migration challenge because it:

1. Communicates with Stellent/OCS and SharePoint only through supported Oracle and Microsoft APIs. Other products write directly to the SharePoint database, which voids Microsoft support agreements.
2. Is very easy to download, install and use. Other products have huge installs and cumbersome UIs as well as dependencies on other software (ex. web servers and Java.)
3. Communicates remotely with Stellent/Oracle Content Server. In other words, no Stellent server-side install is required to use Metalogix products. This is very important to many organizations as it minimizes the impact on a production system.

In addition, Migration Manager for SharePoint – Stellent Edition lets you do all the migration heavy lifting from your own machine. It connects to any SharePoint site that you can access with your browser—even those outside your organization’s intranet. All migration activity is done through the supported SharePoint APIs. There are no un-supported, direct writes to the SharePoint database.

SUMMARY

SharePoint offers Oracle Content Server customers a rich content management and collaboration alternative that is cost effective and easily adopted with the right tools. Organizations can increase end user adoption, improve productivity and collaboration and reduce licensing costs without significant disruption or IT impact. Moving to the market leader, SharePoint, lets you recapture your losses with its online collaboration features. You also save money on annual maintenance and the cost of additional licenses you may soon require.

ABOUT METALOGIX

Metalogix is the trusted provider of content lifecycle management solutions for Microsoft SharePoint, Exchange and Cloud platforms. We deliver high-performance solutions to scale and cost-effectively manage, migrate, store, archive and protect enterprise content.

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