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**Introduction:**

Migrating to a new version of SharePoint is akin to moving to a new home. When you’ve found your perfect new home, there are considerations to keep in mind before you make that move. Will the furniture, knick-knacks, and decorative pieces of your previous home fit and work within your new home? On a similar note, when’s the last time you looked through all of your drawers and discerned just how much useless junk you’ve got hiding in there?

Another thing you have to consider is what built in custom furniture you have in your current home that you simply won’t be able to move. For example, it’s very difficult to move built in closets that you had a contractor build for you, and you’re certainly not going to move the patio you built with imported Italian tiles.

This sorting is the exact tactic that should be applied to a SharePoint migration scenario. Whether you’re moving your environment to SharePoint 2013 or SharePoint Online, it’s essential to consider what the limits of your new environment are, and whether the entirety of your content meets these limits. It’s also important to consider whether certain content is even worth moving at all – perhaps some of this content is just junk, long forgotten in your desk drawer. In this way, a migration plan and analysis of your current environment can save you time, money, and aid in the optimization of your new SharePoint environment.

In addition, it’s important to understand that SharePoint customizations such as custom web parts, custom features/solutions, and even custom Master Pages and Page Layouts, do not work in newer versions of SharePoint, and some custom work will be required to move those.

This is where Metalogix Migration Expert comes into play.

**Migration Expert**

Migration Expert is a free tool that provides you with a detailed analysis of your current environment, by farm or site collection. By analysing your existing farms, web applications, and site collections, based on strict Microsoft limitations, you can ensure that you are not met with migration issues. Pre-emptively clean up the junk, and plan what you move over, and how you move it. Future versions of Migration Expert will also show customizations that are not easy to migrate to newer versions of SharePoint.
Web Applications
Microsoft has implemented certain restrictions and settings options for the setup of your SharePoint environment. Web applications in on-premises SharePoint farms are the 2nd highest tier (after the Farm) where these restrictions come into play.

It’s vital that you are provided with an overview of these limitations. A detailed report of whether your environment fits these criteria, before you begin moving all that content over to SharePoint 2013, could save you a costly and essentially ineffective migration.

Considerations
Microsoft supports a maximum of 20 web applications per farm. Testing revealed that 20 web applications is the known limit that the product can support. As a result, Microsoft recommends that you restrict the number of web applications, and focus on creating additional host name site collections when differentiating between sites. If your SharePoint setup exceeds this supported amount, then you may run into trouble once you migrate your environment over to the latest version of SharePoint 2013.

The Solution
Knowing whether you are coming close to a supported value can save you a significant amount of time and pain when migrating. Metalogix Migration Expert will help you analyse your current environment and report on the limits you are working within, coming too close to meeting, and those that you have surpassed. By knowing the status of all the limits within your SharePoint farms you can adjust accordingly and make your migration experience a flawless one. One solution to limiting the number of web applications is to use Host Headers to enable the use of a single web applications for multiple web sites.

Content Databases
Content Databases are the home of your site content. The home of your site content within SharePoint has certain supported limits. These limits are placed on the number of content databases you can have within a farm, as well as the size of each individual content databases.

Considerations
Microsoft has set a cap of 500 content databases per farm. When you get close to the 500 mark, end users can still enjoy a problem-free experience, opening
sites or site collections, but the experience for administrators is a different story. When you’re at the 500 content database mark, administrators will start having a hard time creating new site collections. Furthermore, having this many content databases can make migrating to a new environment a lengthy process, and you may be storing, and therefore moving, content that you no longer need.

There are limits placed on the size of each individual database as well. For general usage scenarios, no single database should exceed 200GB. This limit also applies if you’re using Remote BLOB Storage. If a single database does exceed that amount then chances are you have content in there that you may not need, or perhaps your content would be easier to access if it was dispersed among various content databases. All of these factors are important and should be taken into consideration before migrating your content. If you have content that is unnecessary, making your content databases too large in size, or too many content databases within a farm, then your migration may be a slow one and your new environment will not be at optimal functionality.

**The Solution**
If you’re struggling with the size of your content databases, then Metalogix Content Matrix is the ideal solution. By using Content Matrix you can quickly and efficiently decrease the size of the content databases by moving a site collection out of a database that is almost at capacity to a new one or to one that has more space. This way any databases that are reaching the size restriction of 200GB can be minimized for optimal usage.

Metalogix StoragePoint can also aid you in prepping your environment for a migration. By using StoragePoint you can increase the performance of SharePoint by using external BLOB storage. This in turn will cut down a 200GB, or greater, database significantly. After this externalization is completed, your environment will now meet the limits set by Microsoft, allowing you to migrate your environment in a way that ensures optimal performance.

**Site Collections**
Site collections are pretty easy to understand – they are collections of SharePoint sites that share common administration pages and site settings. Having site collections is convenient, since you can set them up to share content types, site columns, templates, and Web Parts, all within a single group of SharePoint sites.
Considerations
Having too many can have adverse effects on the success of your SharePoint deployment, and therefore any potential SharePoint migration you may be planning. For this reason Microsoft has limits set for the number of site collections you can have per farm, and the size that each site collection can be.

Number of Site Collections
Microsoft has a supported limit of 750,000 site collections per farm, 500,000 of these can be Personal Sites, and 250,000 can be sites with any other template. All 750,000 can reside on one web application, or can be distributed across multiple web applications. It is important, however, to note that this limit is affected by other factors in your environment.

For instance, if a farm, for example, has a web application that contains 200 content databases, and each of these content databases contains 1,000 site collections, the total number of site collections in the web application will be 200,000. This number falls within the supported limits. However, if each of the 200 content databases on the web application contains 10,000 site collections, even though this number is within the supported limit for a content database, the total number of site collections within the farm would total 2,000,000. This number exceeds the limit for the number of site collections allowed per web application.

A direct result of too many site collections is a decrease in farm performance, possibly affecting you before you even reach the supported limit of 750,000 site collections per farm. These are important factors to consider, since the current poor performance of your farm, due to too many site collections, will continue to affect you post-migration. This in turn defeats the purpose of migrating in order to improve the performance and usability of your SharePoint deployment.

Site Collection Size
Microsoft has also placed a limit on the individual size of site collections. Since they are housed within content databases, the maximum size of a site collection is limited to the maximum size of its content database. So based on the applicable usage scenario, your site collection can be as large as the content database size limit for that usage scenario, as set by Microsoft.

In general, the limit is set to 100 GB per site collection, for both SharePoint 2013 and SharePoint Online environments. This is because certain site collection actions, such as backup and restore, cause large SQL Server operations to have performance issues, or to fail, if other site collections are active within the same
database. Furthermore, site collection backup and restore are only supported for a maximum site collection size of 100 GB.

Site collections larger than 100 GB are therefore at risk of taking a long time, or even failing, during backup and restore. Again, this factor affects the performance of your SharePoint environment and could undermine the purpose of migrating to a newer, more effective, version of SharePoint.

**The Solution**

Metalogix Content Matrix can aid in the organization, or reorganization, of your site collections. By moving site collections around, you can ensure that no one content database exceeds the number of allotted site collections per database, or that any one farm exceeds the 750,000 site collection limit per farm. Once you know where your environment stands with regards to these limits, Content Matrix can help you ensure that you have met all requirements before you begin a migration. As a result, your new SharePoint environment will work at an optimal rate.

**Sites and Subsites**

SharePoint sites and subsites are a place for collaboration, communication, or content storage. They are a great tool that can be an ideal method of storing content as well as presenting it to your internal and external users. However, SharePoint users must be sure to thoroughly understand the limits that are presented with owning sites and subsites. Too many sites within a site collection, or too many subsites within a site, can affect the functionality of your overall SharePoint deployment. This negative impact can in turn be carried over with your migration.

**Considerations**

Microsoft has a recommended limit of a maximum of 250,000 sites per site collection. This means that you can create a very large total number of web sites by nesting subsites within your sites. However, there is also a limit applied to the number of subsites that you can have per site view. The recommended limit is 2,000 subsites per site view – if you surpass this number the web site will no longer perform properly. Both are factors to consider for the optimal functionality of your SharePoint deployment, as well as the health of your new environment post-migration.

Even with these limits placed on the number of sites and subsites that your site collections can have, you can still organize your content in a way that suits you.
and works within the Microsoft limits. For instance you can create a shallow site hierarchy with 100 sites, each with 1,000 subsites, totalling 100,000 web sites. Or you can create a deep hierarchy with 100 sites; each with 10 subsite levels, also containing a total of 100,000 web sites. Working within these limits is vital for optimal performance, and with various site and subsite configurations, working within the limits is easy and even practical.

Furthermore, there are different limits placed on sites within SharePoint 2013 and SharePoint Online. The restriction for a SharePoint Online environment limits the number of sites per site collection to 2,000 sites. This means that migrating from a regular SharePoint environment to a SharePoint Online environment, for example, could be more complex than a simple migration. In this scenario it would be important to know the number of sites you contain within your environment in order to better organize and manage your migration, ensuring that the limits of your new SharePoint environment are met.

The Solution
With Metalogix Content Matrix you can move and reorganize the current location of your web sites and subsites. This ensures that any site collections that are coming close to their site limit, whether it be the SharePoint 2013 or SharePoint Online limit, can be reorganized to reduce numbers. By rearranging the placement of your sites and subsites you can adhere to Microsoft’s outlined limits, thereby guaranteeing the successful deployment, migration, and performance of your SharePoint environment.

Large Files
SharePoint was essentially created as a hub in which to store and share content. Think of it as a storage locker, a space to put all of your goodies. Now imagine how you would fill that locker – the larger the individual items you store, the smaller the total number of items that would reasonably fit. With smaller, compact, items you could fit double, if not triple the number, comfortably utilizing all that space. The same concept applies to your SharePoint environment; the availability of such a useful storage tool comes with limitations, designed to preserve the functionality of your environment.

Considerations
So if your SharePoint environment is the equivalent of a storage locker, then files are the possessions you store inside that locker. With large items stashed inside your locker, not only do less items fit in total but navigating through those items
becomes a pain – using your locker becomes difficult. The same concept applies to the files you store within your SharePoint libraries.

A file is considered a large file when it exceeds 250MB. The greater the amount of large files you have in your farm, the greater your farm performance is negatively affected. Even though this limit can be increased within SharePoint to a maximum of 2GB, it is important to consider that if a file exceeding 250MB is already a large file, then files at 2GB will take up even more space, decreasing farm performance further.

It is important to know how many large files your SharePoint environment is holding. In knowing this you can ratify the situation, decreasing the number of large files and optimizing the functionality of your SharePoint farms. It is particularly important to consider this factor before implementing a mass migration, as there may be files you no longer need that are simply taking up space and slowing down the continuity of your SharePoint operations. This, is an issue that you will invariably end up carrying over to your newly migrated environment.

The Solution
Metalogix Content Matrix can help you by allowing you to reorganize the location of your large files. If too many large files per farm are the problem, then Content Matrix helps by allowing you to move some of those large files to areas where there is still room remaining for them. This allows you to stay within the Microsoft limits, enhancing the performance of your farm and its subsequently migrated version.

Metalogix StoragePoint can also help in this scenario, by reducing the size of files with external BLOB storage. By externalizing the content of the large files, you still have access to them, without pushing the Microsoft limit on size. This furthers the usability of your SharePoint environment, and aids in the migration of content that is already within the pre-set limits.

Checked Out Files
SharePoint truly is an ideal way in which to collaborate with co-workers. From shared calendars, to collaboration on documents and projects, to approval workflows, it provides users with a workspace in which they can efficiently perform their work tasks. One of these convenient features is the ability to check out files, allowing end users to alter them without interruption from their fellow employees.
Considerations
However, with checked out files comes a caveat – if the file has not been checked back in, then SharePoint may not have an up-to-date version of that document. This prevents other end users from seeing the latest version, as the document must be checked back in for the latest changes to be uploaded. This is a factor that would affect the overall success of a migration.

The Solution
It’s important to know how many files you have checked out, and which files they are in particular, prior to a migration. By ensuring that all files have been checked back in, you ensure that your SharePoint environment has an updated version of all documents. This then allows for a migration of only the latest content.

Least Modified Sites
Sites within SharePoint are an easy way to divide up and organize content. However, with this convenience sometimes comes an overuse. Sites and subsites become created for minute organizational purposes and then are often forgotten. An environment with over 10,000 sites, for instance, may have sites and subsites that haven’t been looked at, used, or modified in a significant period of time.

Considerations
If your environment has sites or subsites that were created 3 years ago for the purpose of a specific team project, and this was the ideal solution at the time, but now that the project has been completed, and the site has not been used since, it no longer has that same relevance. Having too many unused sites, therefore, only takes up valuable space, clutters search results with irrelevant content, and slows down your migration.

The Solution
The best practice for this is to look at the Site Owner for the least modified sites, and contact them to check with that still contains relevant content. If not, leave it in the current environment.

List Views Approaching Recommended Thresholds
Lists that have multiple views and a large number of columns tend to have poor performance as they surpass 2000 items, and towards the Microsoft List View Threshold of 5000 items. The more metadata/columns these lists have, the more they will impact performance. It is important to know if you’re reaching this limit.
so that you can split large lists with List Views into multiple lists or use Search Based Lists instead.

**Considerations**
The more metadata/columns these lists have, the more they will impact performance. It is important to know if you’re reaching this limit so that you can split large lists with List Views into multiple lists, narrow down the list filters to return fewer results, or use Search Based Lists instead.

**The Solution**
Creating a Search Based list involves creating a custom search results page that looks like a list, but is in fact a search results page. A difference results page would be needed for each list view.

Splitting lists with Out of the Box (OTB) SharePoint requires multiple steps:

1. Save the existing list as a template
2. Create new lists based on this template
3. Export content from existing list to Excel
4. Copying items and pasting individual items, field by field into the ‘Quick Edit’ view of each new list.

This is an extremely time consuming process.

Splitting lists using [Content Matrix](#), involves multiple quick Copy/Paste operations. In each case, you would:

1. Copy the original list
2. Paste it on the target
3. Rename the new list which will include a subset of the original

Use the filter tab to filter only a subset of the list items into the new list, and run the migration job.

An example of splitting a large list that has financial content with a field called ‘Fiscal Year’, is that follow the above steps and filter only items with a Fiscal Year value of the last 3 years into the new list. Then repeat the process for the previous 3 fiscal years, and so on.

**Custom Web Parts**
Custom Web Parts are time consuming to migrate regardless of whether you’re using an Out-of-the-box (OTB) migration, or 3rd party migration tools. This is
because they use the Application Programming Interface (API) of the current version of SharePoint of your source farm, and SharePoint APIs are not backward compatible. This means that these web parts will not work on SharePoint 2013 unless they are rewritten to use the SharePoint 2013 API. In light of this, it is very important to understand how many of these use you have, where they are installed, and of those which are really used by your users.

**Considerations**

There is only one scenario in which 3rd party migration tools support migration of content in these custom web parts. This is when you have an identical custom web part that has been built for SharePoint 2013 installed in your new SharePoint environment, and that web part’s API supports information being written to it by a migration tool.

**The Solution**

In light of this, the approach Metalogix recommends to dealing with Custom Web Parts is the following:

1. First, identify whether the custom web part is really being used by using SharePoint analytics, a survey, or Metalogix ControlPoint, or similar solution.
2. For those custom web parts that are not being used, notify the site users and owners that you will not be migrating the web part in question due to its lack of use. This is often an opportunity to understand why it was used in the first place, and whether there is a business problem that you could solve for that group during or after the migration in a more effective manner.
3. Check to see if any of the new functionality in SharePoint 2013 could achieve the same goal as the custom web part. If so, you are likely better off using this, since this web part, site definition, or other SharePoint construct will not be considered a customization for your next migration or move, and will therefore be moveable both in an OTB upgrade, and using a 3rd party migration tool such as Content Matrix.
4. If your custom web part is from a 3rd party vendor, and there is no OTB equivalent, reach out to that vendor you purchased it from to see if they have a version of that web part that works on SharePoint 2013, and whether they have a migration strategy for content in that web part.
5. If the custom web part was built in house, and is important for business operations, rewrite the web part for SharePoint 2013 or as an App for
Office 365. If the web part interacts with the content around it in the same way that the current web part does, it is possible to migrate it in many cases using 3rd party migration tools such as Content Matrix.

6. Consider using this opportunity to rewrite the custom web part as a SharePoint App so that it is supported not only in SharePoint 2013 on-premises, but also in Office 365/SharePoint Online, should you ever decide to migrate to Office 365 or a hybrid of on-premises and Office 365. This is only possible if the web part can be re-written to use only Client Side Object Model (CSOM) API, or REST code, which is significantly more limited than the SharePoint Server Object Model that most web parts were written with. For more information, see the MSDN’s article: Apps for SharePoint overview.

Custom Master Pages and layouts
Custom Master Pages, and their associated page layouts, cannot simply be migrated over from SharePoint 2007 or 2010 to SharePoint 2013. While the formatting of Master Pages is similar between these versions, it is not the same, and Master Pages written for one version do not work in any of the other versions.

Considerations
It is vital to know how many custom master pages you have and what they are, before migration, so that you know which of these you either have to discard, or rebuild to work with SharePoint 2013 on-premises. Once these pages have been rebuilt, you can easily migrate the content directly from the old version of the page to the new version using both the OTB Upgrade and 3rd party migration tools such as Content Matrix.

Our experience in working with thousands of organizations and systems integrators who have successfully migrated to new versions of SharePoint, has taught us that the development and implementation of Master Pages and Page Layouts is an area that is often misunderstood by IT managers.

The Solution
Metalogix recommends working with SharePoint UI implementation experts to implement new versions of Master Pages and Page Layouts, and not assigning this task to SharePoint developers, who specialize in a completely different
skillset (Visual Studio development vs. HTML and XML) and toolsets (Visual Studio and SharePoint Designer respectively).

In addition, Metalogix recommends working with graphic designers to create the look and feel of the Master Pages (usually using Adobe Photoshop or similar tools), and have the content generated by those tools given to the SharePoint UI implementation experts. Most SharePoint UI experts are not graphic designers, and won’t necessarily create good designs even if they know how to implement designs created by others. Similarly, most graphic designers know how to design beautiful web pages, but are not familiar with UI implementation in SharePoint.

**Custom Site Definitions**

Custom Site Definitions are site definitions that did not come out of the box with your version of SharePoint and were either created by your SharePoint Admin to solve a specific business problem, or installed through a 3rd party solution. Custom Site Definitions are most frequently variations in layout of existing site definitions, with additional Out-of-The-Box (OTB) web parts added by default to a location on the site. In these cases, the best option for migrating sites using site definitions that are also being used by your users is to create an equivalent site definition for SharePoint 2013 and installing it in your target SharePoint 2013 farm prior to migrating.

In cases where Custom Site Definitions contain custom Master Pages and Page Layouts, and/or Custom Web Parts, creating these definitions in SharePoint 2013 will involve the same issues raised in Migration Expert’s reports on these customizations.

Since the newest versions of SharePoint usually include new Site Definitions, it may be worth investigating if any of the new Site Definitions meet your needs, and migrating sites to sites based on those new definitions. This is only possible with 3rd party migration products.

**Personal / My Sites**

This report notifies you of the number of employee specific sites your environment contains. It is important to know this number for two reasons:

1. For on-premises SharePoint 2013 Microsoft has a limit of 500,000 MySites.
2. In many organizations, MySites have not been used by the majority of employees. In light of that, it’s not necessary to migrate the sites that have not been used.
MySite adoption requires a significant internal marketing push on the advantages of being able to find experts within your organization, and in the case of SkyDrive Pro, recently renamed to OneDrive for Business, the benefits of enabling cross company collaboration for specific documents that are approved for sharing. Metalogix recommends using the migration as a time to not only improve on your SharePoint implementation, but also as an opportunity to do a large internal marketing launch or re-launch of your SharePoint site, with executive buy in and support. Our experience has been that this can have as much impact on adoption as some of the more technical aspects of SharePoint implementation.

**Custom Web Part Pages**

Custom web part pages are pages with a custom layout of web parts that was not available Out of the Box. These custom layouts were typically created either in Visual Studio, or using SharePoint Designer, and do not migrate well to new versions of SharePoint. As a result, you must recreate them in your new SharePoint environment, prior to migrating. If the web parts on these pages are OTB web parts, then once the page has been recreated, the migration will work smoothly.

**Deprecated site definitions**

Some site definitions such as the ‘Meeting Workspace’ and ‘Document Workspace’, have effectively been discontinued by Microsoft and are no longer available in newer versions of SharePoint, or on Office 365. As a result, if you are using any of these site definitions in sites on your current farm, you will have to choose an alternative site definition that has as much of the layout that the deprecated site definition had as possible on a target site in order to migrate. These sites can be migrated, but may have to be modified from within SharePoint after the migration to return them to the same layout and functionality as the original Site Definition. For a full list of discontinued features, see Microsoft’s page about this on [office.microsoft.com](http://office.microsoft.com).
Metalogix Products That Can Help

ControlPoint:
ControlPoint is a powerful SharePoint administration tool that allows you to securely manage permissions across multiple farms, automate and enforce governance across cloud and hybrid scenarios, and simplify administration. It also includes a significantly more robust pre-migration reporting capability than Migration Expert, including the ability to ignore Microsoft thresholds and use custom sizes or numbers for any of the above mentioned thresholds, the ability to find custom web parts, where those are located, custom workflows, custom Master Pages, and many other items that could slow down a migration.

Content Matrix:
Content Matrix is the ideal tool for cleaning up your SharePoint environment pre-migration. By allowing you to move around sites, files, and other content found within your SharePoint farms, Content Matrix can help you adjust your environment so that it meets the Microsoft limits. As a result, you can enhance your current environment to an optimal functionality, and then migrate it over to your new SharePoint solution at its highest performance capability. Now your new SharePoint solution won’t only meet Microsoft’s set limits, but will perform at its best.

Content Matrix isn’t only ideal for a pre-migration solution, it also happens to be the ideal tool for the migration itself. A SharePoint migration is a complex and daunting process. With Content Matrix, you go beyond the basic Microsoft upgrade tools, and get the power, speed and flexibility you need to carry out your SharePoint upgrade with confidence. Identify what content you currently have, build out a new site structure and move your content when, where and how you want.

Instantly take advantage of new SharePoint 2013 or Office 365 functionality by directly migrating from any previous version of SharePoint. Microsoft’s SharePoint upgrade tools have basic support for upgrading from SharePoint 2010 and do not support migrating from SharePoint 2003 and 2007. Content Matrix is a SharePoint migration tool that removes this limitation and provides comprehensive support for SharePoint migrations to 2013 or Office 365 – from SharePoint 2003, 2007 or 2010.

StoragePoint:
You implemented SharePoint to manage all of your content in one place. Unfortunately, if your files were larger than 2 GB, you couldn’t — until now.
StoragePoint shatters the 2GB limit. If you have 3D CAD files, high-def videos or software builds that you want to manage together with the rest of your content, StoragePoint is for you.

StoragePoint is the ideal solution for shrinking databases and reducing Large Files. It’s a simple solution that, by moving BLOBs outside of SQL Server, enhances the performance of your environment, while decreasing it in size.

Microsoft recommends that SharePoint Content Databases not exceed 200 GB for active content. Why? Because Content files, or Binary Large Objects (BLOBs), such as presentations, PDFs and images, weigh down SharePoint content databases. Bloated databases slow search and file upload and download speeds.

StoragePoint shrinks databases up to 95% by moving BLOBs outside of SQL Server using SharePoint’s Remote BLOB Storage (RBS) and External BLOB Storage (EBS) interfaces.

This reduction is then an ideal first step to cleaning up your environment before migrating all that content. By a swift clean pre-migration with StoragePoint, you’ll ensure that your newly migrated environment’s performance is at its best.