

Metalogix® Essentials for Office 365 2.13

Performance Optimization Guide



© 2023 Quest Software Inc. ALL RIGHTS RESERVED.

This guide contains proprietary information protected by copyright. The software described in this guide is furnished under a software license or nondisclosure agreement. This software may be used or copied only in accordance with the terms of the applicable agreement. No part of this guide may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording for any purpose other than the purchaser's personal use without the written permission of Quest Software Inc.

The information in this document is provided in connection with Quest Software products. No license, express or implied, by estoppel or otherwise, to any intellectual property right is granted by this document or in connection with the sale of Quest Software products. EXCEPT AS SET FORTH IN THE TERMS AND CONDITIONS AS SPECIFIED IN THE LICENSE AGREEMENT FOR THIS PRODUCT, QUEST SOFTWARE ASSUMES NO LIABILITY WHATSOEVER AND DISCLAIMS ANY EXPRESS, IMPLIED OR STATUTORY WARRANTY RELATING TO ITS PRODUCTS INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NON-INFRINGEMENT. IN NO EVENT SHALL QUEST SOFTWARE BE LIABLE FOR ANY DIRECT, INDIRECT, CONSEQUENTIAL, PUNITIVE, SPECIAL OR INCIDENTAL DAMAGES (INCLUDING, WITHOUT LIMITATION, DAMAGES FOR LOSS OF PROFITS, BUSINESS INTERRUPTION OR LOSS OF INFORMATION) ARISING OUT OF THE USE OR INABILITY TO USE THIS DOCUMENT, EVEN IF QUEST SOFTWARE HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. Quest Software makes no representations or warranties with respect to the accuracy or completeness of the contents of this document and reserves the right to make changes to specifications and product descriptions at any time without notice. Quest Software does not make any commitment to update the information contained in this document.

If you have any questions regarding your potential use of this material, contact:

Quest Software Inc.
Attn: LEGAL Dept.
4 Polaris Way
Aliso Viejo, CA 92656

Refer to our Web site (<https://www.quest.com>) for regional and international office information.


Patents


Quest Software is proud of our advanced technology. Patents and pending patents may apply to this product. For the most current information about applicable patents for this product, please visit our website at <https://www.quest.com/legal>.

Trademarks

Quest, the Quest logo, and Metalogix are trademarks and registered trademarks of Quest Software Inc. and its affiliates. For a complete list of Quest marks, visit <https://www.quest.com/legal/trademark-information.aspx>. All other trademarks and registered trademarks are the property of their respective owners.

Legend

 **CAUTION:** A caution icon indicates potential damage to hardware or loss of data if instructions are not followed.

 **IMPORTANT, NOTE, TIP, MOBILE OR VIDEO:** An information icon indicates supporting information.

Metalogix® Essentials for Office 365

Updated August 2023

Version 2.13

Contents

Introduction	4
Understanding the Architecture	5
Permissions and Security	6
Hardware Recommendations	7
Physical vs Virtual vs Cloud	7
Computer Specifications	7
Host Recommendations	9
Network Connection	9
64-bit Architecture	9
Antivirus Scanners and Exceptions	9
Other Software	10
Essentials for Office 365 Configuration	11
Threads and Parallel Operations	11
Deployment Location	11
Memory Allocation	11
SharePoint and Office 365 Permissions	12
Scripts and Schedules	12
Azure Turbo Mode (migration only)	13
Migration and Backup Options (less can be more)	13
Frequently Asked Questions and Scenarios	14
Next Steps	15
Network Recommendations	16
Off Peak	16
Firewall Permission Setup	16
Content Data Flow	17
Conclusion	18

Introduction

Metalogix Essentials for Office 365 allow users to migrate their data into SharePoint Online and also to backup both SharePoint and Office 365 data (OneDrive for Business and Exchange Online).

This goal of this documents is to help provide several best practices for performance optimization around migration and backup using Metalogix Essentials for Office 365. These topics include: hardware, host, software and network recommendations.

The following should be considered as guidance to optimize performance and throughput using this solution. For information about usage or features of the software, please refer to the User Guide found in the software's Help menu or visit the following link:

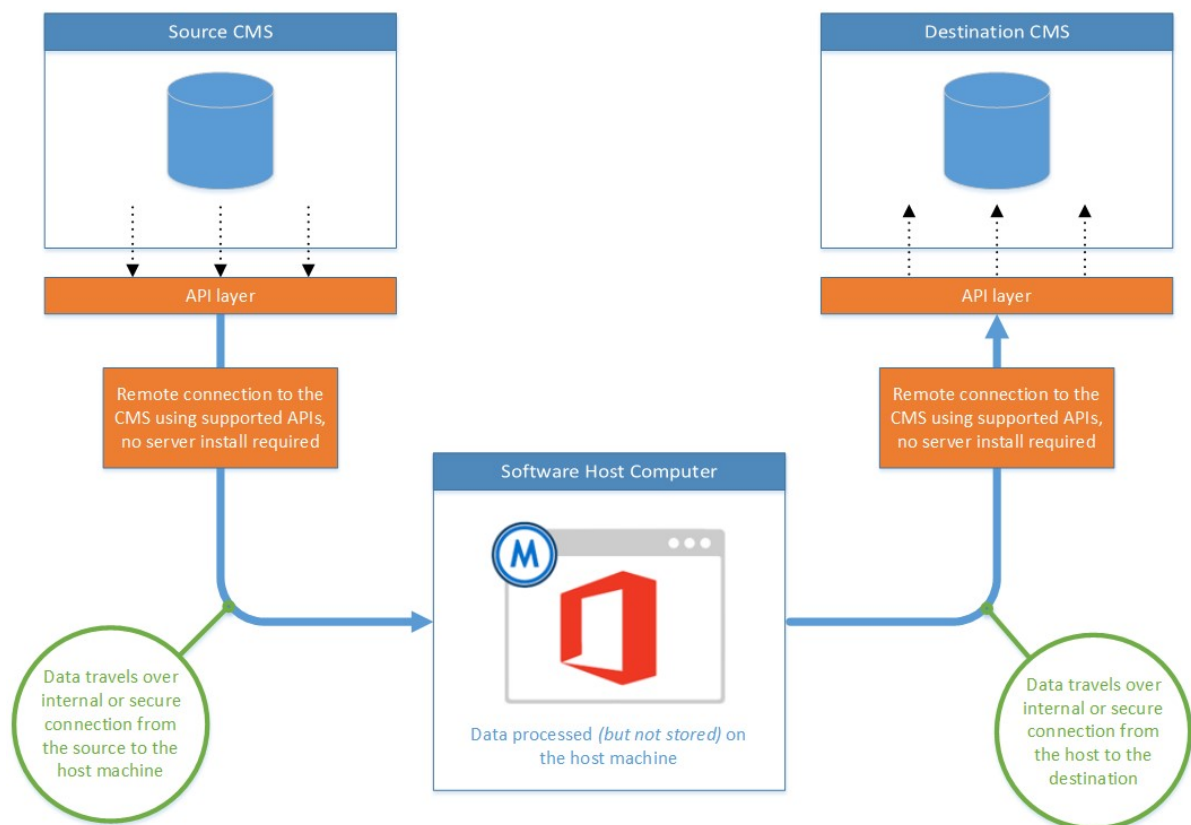
<http://documents.quest.com/Metalogix-Essentials-For-Office-365>

Understanding the Architecture

Before we begin describing methods that can be used to improve migration and backup performance, it is important to briefly understand the architecture of the Essentials for Office 365 solution.

Firstly, the solution is a client side application which means that it needs to be installed to either a physical or virtual computer to run. From this host computer, all operations will be performed and all data will pass through. Think of the software as sitting between your source and destination locations, whether that be an on premise SharePoint you are migrating to SharePoint Online or a OneDrive for Business site in Office 365 that is being backed up to Azure storage.

The diagram below provides a basic example of how Essentials for Office 365 communicates. This simple example places the software between source and destination and highlights the data flow during a migration or backup operation.



As we will discuss a little later, any obstacles or hurdles that sit in the process of this data flow (load balancers, firewalls, antivirus scanners, VPN, etc.) may have a negative impact on throughput. Wherever and whenever possible, we want to establish a path of least resistance.

To summarize, the typical deployment of Essentials for Office 365 is to install it on a host machine that sits between source and destination, allow the source data to pass through this host on its journey to the target. Now, let's begin to explore if this typical deployment is the optimal deployment to maximize performance.

Permissions and Security

To begin on the path to optimization, you should be prepared to have local Admin permissions to the host machine, Site Collection Admin permissions to any SharePoint site and possibly permissions to alter or create exceptions in any antivirus scanner, firewall or load balancer in your network. Please discuss with your IT department **before** making any changes as Quest cannot provide support for any issues that may have resulted from an improper or unauthorized modification outside of the Essentials for Office 365 software.

Hardware Recommendations

The first consideration and the lifeblood of all software is the hardware in which it is running on and this is where your first optimization decision is made; physical vs virtual vs cloud. From a software perspective, Essentials for Office 365 can be installed and run from any of those environments without sacrificing functionality however which one is ideal depends on your environment and requirements.

Physical vs Virtual vs Cloud

The general rule is to install the Essentials for Office 365 software closest to your data repositories. For example, if you are migrating from a SharePoint on-premises to SharePoint Online, deploy Essentials closer to your source within your network. If you are migrating Google Drive to OneDrive for Business, consider deploying Essentials to a cloud computing service like Azure or Amazon EC2 where the benefit of not downloading and uploading through your network can be realized. Keep in mind cloud computing can be a costly operation when considering this an option.

i **NOTE:** If you do explore the option of cloud computing in Azure be sure to provision your Azure instance in the same data region as your Office 365 tenant. If you are unsure about your tenant's region, please contact Microsoft support for assistance.

Computer Specifications

Regardless of your hardware location, machine specs are also of importance and can be broken into four basic categories; CPU, memory (RAM), hard disk space and network.

- **CPU:** Recommendation is any “modern” dual core 64-bit CPU with hyper threading enabled. Most CPUs manufactured in the past 3 years will be more than sufficient.
- **Memory:** We recommend having at least 4GB of available memory on this hardware. Available memory meaning memory not being consumed by other processes rather than total amount of physical memory installed. You may have 4GB installed on the hardware, but other processes like Windows may consume 50% or more of that amount. This will be crucial when talking about multi-threaded or parallel operations in the coming sections.
- **Hard Disk Space:** While the data during a migration is only stored temporarily, other dependencies like installation, logs and backup data can consume disk space. Please be sure that at least 10GB of disk space is available to be consumed by Essentials. If disk space reaches zero, expect performance and other issues. If you are creating a backup, make sure you have enough disk space (local or cloud) to store the totality of your backup plus an additional 5% for overhead.

- Network: The faster the better. Any stable connection will do, but a fast 1Gbps hard wired network connection is ideal.

Host Recommendations

Now that the hardware is setup and ready to go, let's discuss the host configuration. When we mention "host", we are talking specifically about the computer that Essentials for Office 365 is installed to and any software settings or configurations that can affect performance.

Network Connection

We mentioned it the Hardware section and we will mention here again, a stable network connection is important. Avoid at all costs any migration or backup over VPN or unstable Wi-Fi connections. If you login using a VPN and notice frequent lost connections or slowdowns, don't expect these operations to work any more smoothly for you.

64-bit Architecture

Windows 64-bit architecture is strongly recommended due to the advancement in memory allocation over 32-bit. A 64-bit architecture will allow memory allocation to the Essentials software greater than the 1.5GB maximum from old, so please be sure that both your hardware and software are 64-bit compatible.

Antivirus Scanners and Exceptions

Antivirus Scanners are applications that are great for keeping bad things out, but not so great when you are running operations that move large amounts of data quickly (i.e. migrations and backup). If at all possible, disable all antivirus and malware scanners that are actively monitoring your host machine. If a complete disable is not possible, please strongly consider adding exceptions to the following locations:

- Metalogix Essentials for Office 365 installation directory. By default, this is C:\Program Files\Quest\Essentials or C:\Program Files (x86)\Quest\Essentials
- Metalogix Essentials for Office 365 workspace directory. By default, this is C:\Users\{UserDirectory}\Essentials
- Metalogix Essentials for Office 365 temporary directory. By default, this is C:\Users\{UserDirectory}\AppData\Local\Temp
- Metalogix Essentials for Office 365 backup location. If you are storing backups locally, please add this location(s) to the exception list as well.

Other Software

This should go without saying, but if possible please dedicate the entire host machine to running the migration and/or backup only. If you are running the Essentials software on your laptop while you are also running Outlook, web browser sessions or any other software, they will all compete for system resources thus leading to performance degradation. Whenever possible, the minimal amount of software should be running on the host.

Essentials for Office 365 Configuration

Moving on past the hardware and host, we arrive at the software itself and how best to configure Essentials for Office 365 to optimize performance.

Threads and Parallel Operations

Multi-threading and parallel operations are key ingredients to an optimal performance driven migration or backup, but that comes with caveats. The more operations that are being processed in parallel (either using threads or parallel jobs) the more resources that are consumed. This means CPU cycles, large amounts of memory, disk space and network traffic, so if you want to push this area please be sure not to skimp out on the earlier hardware recommendations.

Deployment Location

Earlier in the Architecture section we outlined how Essentials for Office 365 sits “between” source and destination repositories, but that may not always be the optimal deployment. Although Essentials operates as a “no server side” install piece of software, there may be instances when installing it to your source or destination server or SharePoint WFE may provide a substantial performance increase. If you reference the Architecture diagram, you will notice the data flows from source through Essentials (on the host) and then ultimately to the destination, but what if Essentials was deployed on to the source or destination directly? That would minimize one entire network transfer from the operation leading to a more direct source to destination content move. As you can imagine, in some environments this can lead to very impressive performance gains and if possible, one of our more strongly recommended configurations.

Memory Allocation

Memory allocation to Essentials is vital to a successful multi-threaded or parallel run operation. Each instance of the software will consume additional memory and each additional thread has the potential to do so as well. Please be conscious of the relationship between the total amount of system memory physically available on your host machine, how much is being consumed by other resources and how much is left to allocate to Essentials. We do not recommend allocation more than 50% of total physical system memory to Essentials. This is certainly an area where trial and error may be required to find the ideal spot between optimization and overreach, but using a 50/50 ratio is a good starting point to begin.

- To configure the amount of memory allocated to Essentials for Office 365, please go to Help > Profile Manager > **Memory Management**. Please note that an application restart is required after modifying this value.
- To configure increased thread count for operations, please go to Help > Profile Manager > Global Variables and change the value in the **Max Threads for Copy** field. Please note that an application restart is required after modifying this value.

i NOTE: When adjusting Memory Allocation please be aware that this will be the amount of memory consumed for every running instance of the Essential's software on this host computer. For example, if you configure 4GB of memory and run 3 parallel instances (i.e. scheduled backups), the combined total memory consumption of all instances is now up to 12GB. This may be much more than what is available on your host machine and can lead to an increased number of failed events, premature termination, failed jobs or any number of related issues. Essentials is designed to consume as much resources as possible to maximize performance and responsiveness per instance, so in some cases running multiple operations (threads) in a single instance is preferable to running a single operation in multiple, concurrent instances.

A quick example to determine memory allocation would be to take the total physical amount of memory on your host machine and divide that in half. Then divide that remaining value by the number of concurrent instances (migration or backup) that you wish to perform. The remaining value is what you should use as a starting point for the Memory Allocation value.

$16\text{GB} / 2 = 8\text{GB}$ of usable memory.

$8\text{GB} / 3$ concurrent or parallel instances (migration or backups) = 2.67 GB rounded down to 2560MB.

In this example, your starting point would be to select 2560MB for memory allocation and since that is more than a 32-bit application permits, please be sure to take advantage of 64-bit architecture.

SharePoint and Office 365 Permissions

A quick mention to make sure you are providing the software with an adequate level of permissions for all SharePoint and Office 365 operations. If the user account provided does not have access to certain locations or objects (sites, lists, mailboxes, groups, etc.), this will result in any number of failures and connection issues which will decrease performance. When possible, always provide the highest level of permissions available, this means Site Collection Admin for SharePoint and Global Administrator for Office 365.

Scripts and Schedules

Scripting and potentially scheduling operations provide essential benefits to a migration and backup plans but they also have the added benefit of minimizing resource consumption. If the software's user interface is not being rendered, refreshed with a progress bar or status, caching elements and everything else that comes with displaying a view, then that is less resources that are being consumed

on the host. Less resources for a visual presentation means that more resources can be used for the operation. Please remember the previous [section](#) where issues may arise if too many concurrent instances or parallel operations are running.

Azure Turbo Mode (migration only)

When performing a migration into SharePoint Online or OneDrive for Business in Office 365, the use of the Azure Turbo Mode option can provide a measurable (*in most cases*) performance increase for minimal configuration time and effort. Please review the Azure Turbo Mode sections of the User Guide to learn more about what it does and how it is configured

The User Guide can be found here: <http://documents.quest.com/Metalogix-Essentials-for-Office-365>

Migration and Backup Options (less can be more)

Like most people who are presented with a series of checkbox options, I tend to check them all, unless of course there is a cost associated to them. However, when trying to squeeze out every last bit of optimization from a backup or migration you should be aware that the more options included, the more operations and processing that takes places and unfortunately the longer it will take to complete. Therefore, it is important to understand all the available options, what they are designed to do and whether or not they are critical to the success of your project. If they are not, then you may consider leaving a few unchecked (as much as this may pain you to do so).

Here is a small list of a few options that can take a considerable amount of time to complete:

- Design and Master Page customizations (migration)
- Include All Mailboxes or Include All OneDrive for Business sites (backup)
- Include All Versions (migration and backup).
- Item level permissions (migration or backup)
- SharePoint Designer Objects (migration)

Frequently Asked Questions and Scenarios

Here is a collection of questions and scenarios that users have sent us over the years.

Q: How many copies of Essentials for Office 365 can I run at one time? Is there a performance benefit?

A: You can run as many copies (instances) as your host system can support, however it is important to understand the host's limitations (CPU, memory, hard disk space, network bandwidth) before running additional instances. While it can provide a performance increase, the preferred approach would be to run parallel operations within the same, single instance of Essentials as resources can be conserved and allocated as required.

Q: Does running more than one copy of Essentials for Office 365 cause instability?

A: It can if the host computer runs low on system resources. When Windows runs low on resources (memory, disk space, etc.) this software like any other can become unstable or unresponsive. If you plan to run multiple, concurrent instances please be conscious of the resource availability on the host.

Q: For memory allocation, how much is enough? How much is too much?

A: For maximum performance, as much as you can allocate using the following guidelines. Do not exceed 50% of the total physical memory in the host. If the host machine has 8GB of total memory, do not allocate more than 4GB to Essentials. And remember, if you run 2 instances of Essentials configured with 4GB of memory, then you may actually consume a total of 8GB which is 100% of the host's total resources.

This can and probably will lead to instability.

Q: How many parallel operations can I run in a single instance? Is there a performance gain from this configuration?

A: Similar to running several copies of Essentials, a performance gain is certainly possible. Multi-threaded operations like these are the preferred method since the software can better handle the resource consumption of the host. You still need to be conscious of the total resource availability, however the software will not consume more than what it has been configured.

Next Steps

Now that you have read through the various ways to consider and optimize the performance of Essentials for Office 365, it's time to start using it.

Please review the all our documentation to better understand the usage of the software:

<http://documents.quest.com/Metalogix-Essentials-for-Office-365>

Network Recommendations

Continuing on to the next part takes us to your network, which in most cases can mean your internet connection. If you are migrating to or backing up from Office 365 then all that data is obviously traveling through your internet connection. If you have a maximum download or upload connection through your Internet Service Provider of 10Mbps, then it is not realistic to expect you will have any performance or throughput greater than that number. Time tables and expectations need to be set appropriately based on how much data can be uploaded or downloaded using the internet connection provided.

Off Peak

Because highly optimized migrations and backups can and will consume as much network traffic as they are allowed, it is important to understand what level of impact this may have on your business during normal hours. If you are attempting a migration during peak business hours, there may not be enough bandwidth available to maximize performance or worse it may consume precious little bandwidth available and have a negative impact on your daily business operations. Therefore, time of day as well as network considerations should be taken into account before any operation is started. If you want to take full advantage of your network or internet connection, then scheduling for off peak or after hour is ideal and strongly recommended.

Firewall Permission Setup

URLs that need to be Unblocked.

Purpose	URL
Connection to Quest/Metalogix license server	https://license.metalogix.com/license/licenseservice.aspx
Migrating to SharePoint Online	https://login.windows.net/ https://login.microsoftonline.com/
Migrating Nintex Forms and/or workflows to SharePoint Online	https://discovery.nintexo365.com/
Location for AutoUpdate	http://www.metavistech.com/

Content Data Flow

This is a good place to remind you that the Architecture of the software means that your content (migration or backup) will travel through the Essentials for Office 365 as it is deployed on its host machine.

Keep that in mind when you are looking into your network bandwidth. If you are backing up a SharePoint Online site to Amazon S3 storage, that content is being downloaded to the host machine (temporarily) and then uploaded to your Amazon S3 storage, so both download and upload operations to consider for bandwidth allocation.

Conclusion

This guide is designed to provide you with a “self-service” approach to answering some frequently presented scenarios we have encountered over the years. Due to the complex nature of everyone’s unique environmental configuration we cannot possibly address every situation, although we do hope it serves as a valuable resource to improve your migration and backup performance or at least help you consider some area that you may have otherwise overlooked.