



Quest® On Demand Migration

# Hybrid Content Matrix User Guide



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#### 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.

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# About On Demand Migration - Hybrid Content Matrix

On Demand Migration - Hybrid Content Matrix combines the powerful functionality of Metalogix® Content Matrix with the easy-to-use, cloud-based interface of On Demand for performing migrations of SharePoint on premises site collections to SharePoint Online.

You can enter all of the information needed to perform a migration tasks in On Demand, which includes discovering site collections, discovering and mapping users, selecting the site collection you want to migrate, and configuring and running the migration.

That information is then passed from On Demand to Content Matrix, which is installed in a SharePoint on-premises environment, for processing. Results are then returned to On Demand.

## Prerequisites

The following prerequisites are required to begin using On Demand Hybrid Content Matrix:

- An On Demand subscription that includes consent for Hybrid Content Matrix for the tenant(s) in your organization to which you want to migrate.
- Content Matrix version 9.7 or later installed and activated.  
See the [Metalogix Content Matrix Advanced Installation Guide](#) for details.
- An On Demand hybrid agent installed on the same server or client machine as Content Matrix and [configured to run Content Matrix as a Service](#), which allows communication between On Demand and Content Matrix.  
See the [On Demand Global Settings User Guide](#) for instructions for installing an agent.

## Configuring an Agent for Hybrid Content Matrix

If you have not already done so, you will need to install an On Demand agent on the same server or client machine as Content Matrix.

Once the agent is installed, complete the following steps:

1. On the Tenants > Hybrid Agent tab, click **Edit Configurations**.
2. Click **Select Actions**.
3. Check **Run Content Matrix as a Service**, then click **Select**.

Once the agent is successfully configured, Hybrid Content Matrix will be available as a Migration option in On Demand.

## Accessing Hybrid Content Matrix

1. Sign in to Quest On Demand (and if you have multiple organizations, choose an organization).
2. From the navigation pane, select **Migrate > Projects**.  
A list of current On Demand Migration projects displays. You can either open an existing Content Matrix Hybrid project or create a new project. If no On Demand Migration projects exist yet, you will be prompted to [Create Project](#).

## Project Dashboard

The dashboard gives you an overview of current On Demand Hybrid Content Matrix projects. When you open a project:

- The first tile lists tasks in the current project, along with an icon indicating each task's status. If you click **Show All**, you will be redirected to the [Tasks](#) tab.
- The second tile identifies the status of events, including any errors or warnings. If you click **Show All**, you will be redirected to the [Events](#) tab.
- The third tile identifies tasks that are currently in the task queue.

### ***To rename or delete an existing project:***

From the top right-hand corner of the project panel, click the **More Actions** icon (3 dots) and choose **Rename Project** or **Delete Project**.

# Creating a Hybrid Content Matrix Migration Project

To begin the process of migrating a SharePoint on premises site collection to SharePoint Online, you must first create a project, which includes selecting an active connection to a SharePoint on-premise Web application or farm, and to the O365 tenant to which you want to migrate content.

**i** **IMPORTANT:** The source connection must be at the farm, Web application, or database level using any Content Matrix on premises connection type. If you are using a database connection, a Host Header must be specified. See the Connecting to SharePoint On Premises section in the [Metalogix Content Matrix SharePoint Edition User Guide](#) for complete details.

1. Click **Create Project**.
2. Select the Hybrid Content Matrix tile.
3. Enter a **Project Name**, and optionally, a **Project Description**.
4. Enter the name of the **Hybrid Agent** that has been [configured for Hybrid Content Matrix](#).  
The agent name can be found under Tenants > Hybrid Agents. If an agent has been entered previously, it can be selected from the dropdown.

**i** **NOTE:** If you want to **Show offline agents**, check this box. If an agent is offline, you must connect to it before continuing.
5. By default, the agent retrieves the Content Matrix license key. However, if it does not find an active Content Matrix license, uncheck **Use existing Content Matrix license key from agent** and enter the license key provided by Quest Support.

**i** **NOTE:** . If you enter the Content Matrix license key in On Demand, the agent will activate the license in Content Matrix.
6. Click **Refresh Connections**.  
The agent retrieves the active Farm and Web application connections from Content Matrix.
7. When the active connections have been successfully retrieved, select a **Source** connection from the dropdown.
8. Select a **Target** tenant from dropdown, which is populated with all tenants that have been added to On Demand organization.
9. Click **Save & Continue**.  
On Demand validates the information you entered, including the agent and Content Matrix license status and displays the project dashboard. By default, the **Open Project** option is checked. If you uncheck this box, you can exit and open the project at a later time.
10. Click **Finish & Close**.

# Configuring the Project

You will need to configure a project if:

- you want to specify a default target user to use if any user (including the site owner) has no match on the target  
AND/OR
- the target tenant uses a custom Url

**i** | **NOTE:** The SharePoint migration service builds the expected SharePoint Admin Center Url based on SharePoint's default naming convention. If the tenant uses a custom SharePoint Admin Center Url, the default Url needs to be set manually.

1. Open the project.
2. Click **Configure Project**.
3. Depending on your requirements enter:
  - the account (email address) of a **Default Target User** to use for any user that has no match on the target.

**i** | **NOTES:**

- If you specify a default target user and a mapping for the site owner can be found, the mapped account will be used.
- You can override the project's default target user for individual migration tasks.

AND/OR

- the **Target SharePoint Admin Center Url** in the default format:  
*https://[default tenant name]-admin.sharepoint.com.*
4. Click **Finish**.

# Migration Tasks

A Hybrid Content Matrix migration consists of the following tasks:

- [Discovering the site collections within the selected Web application or farm](#)
- [Discovering and mapping users](#)
- [Configuring and Running the Migration](#)

## Discovering Site Collections

Once a [migration project](#) has been created, the first task is to discover the site collections within the selected source Web application or farm.

1. From the SharePoint tab, click **Discover Site Collections**.

The progress of the task, along with any errors, are recorded on the dashboard.

**i** **NOTE:** If the discovery fails (for example, the connection is not active or the agent is offline), the project will have to be [recreated](#).

2. Select the site collection you want to migrate.

**i** **NOTE:** You can multi-select multiple site collections to use to [discover users](#) for creating user mappings . (For example, you may want to create a global mapping file that you can import to other projects). However, you can only *migrate* a single site collection. If you have multiple site collections selected and proceed to the [Migrate](#) tab, you will be prompted to select only the site collection you want to migrate.

## Discovering and Mapping Users

After discovering site collections, the next task is to discover and map users.

**i** **NOTE:** If you will be uploading a .csv file that has been completed with both source and target users, you can skip Discover Users task and continue with [Mapping Users](#)

## Discovering Users

From the SharePoint tab, click **Discover Users** to discover the users in the selected site collection(s).



**i** **TIP:** If you know that the users are the same for more than one discovered site collection, you only have to select one of them. If selected sites have inherited permissions, the Task list will identify which sites had unique permissions

## Mapping Users

You can map users by:

- having users fetched from the target and matched with discovered source users  
OR
- creating a mapping file with discovered users that can be exported and manually updated with target information.  
OR
- importing a csv file that is completed with both source and target users

**i** **NOTE:**

- Importing mapped users from a file is significantly faster than having users matched by the system, because with matching *all* users must be fetched from the target and compared, and a match for all users may not be found.
- If you choose to use a manually-created user mapping file, the columns in the file must correspond to the columns on the Users tab in On Demand Hybrid Content Matrix.

### To match users:

1. From the Users tab, select the discovered users you want to match then click **Match Users** to display the New Match Users Task dialog.
2. Select a **Match Option** from the drop-down:
  - Any
  - User id
  - Username
  - Email
  - Display Name
3. Click **Next**.
4. Select one of the following options:
  - **Run Now**
  - **Run Later** (to save the task for running at a later time)
  - **Schedule** (to specify a date and time to run the task)
5. Click **Next** then **Finish**.

If a matching user is found, it is displayed in the applicable Target column(s). If no target user is found, all Target columns remain blank

**To map users from a file:**

1. From the Users tab, select the users you want to map.
2. Click **Export**.  
A csv file is created which includes the source users and all of the columns that can be used to map target users.
3. Extract and open the mapping file, then complete one or more of the target user fields for each of the users you want to map.
4. Save the file, then from the Users tab, click **Map From File**.
5. Click **Browse**, select the mapping file from your file system, then click **Next**.
6. Check the **Load Target Users And Validate Mapping** box.

**i** | **NOTE:** If you leave this box unchecked, validation will not occur and you run the risk of user mapping failures during migration.

7. Click **Next**.
8. Select one of the following options:
  - **Run Now**
  - **Run Later** (to save the task for running at a later time)
  - **Schedule** (to specify a date and time to run the task)

You can monitor the progress of the task on the [Tasks](#) tab

**To import users from a completed mapping file:**

1. From the Users tab, select **More Actions > Import Mappings From File**.
2. Click **Browse**, select the mapping file from your file system, then click **Next**.

**i** | **NOTE:** Ideally, the file you select has been validated and/or successfully used in a migration project.

3. Select one of the following options:
  - **Run Now**
  - **Run Later** (to save the task for running at a later time)
  - **Schedule** (to specify a date and time to run the task)

You can monitor the progress of the task on the [Tasks](#) tab

# Configuring and Running the Migration

1. Click the **Migration** tab.
2. Specify the following:
  - Migration Option
  - Site Options
  - List Content Options

**i** **NOTE:** When an option is not available for selection in On Demand, Content Matrix defaults are used. See the [Configure Copying Options](#) section of the [Metalogix Content Matrix SharePoint Edition User Guide](#) for complete details about migration configuration options.

You can move between tabs using the **Back** and **Next** buttons.

**i** **NOTE:** On the Migration Options tab:

- **Default Target User Account** is a required field. If the [project has been configured](#) to use a Default Target User, the field will be prepopulated with that account. You can, however, override it for the current migration task.
- The **Convert Publishing Sites to Communication Sites** option is visible only if the one of the following templates is used on the source:
  - CMSPUBLISHING#0
  - BLANKINTERNET#0
  - BLANKINTERNETCONTAINER#0
  - BLANKINTERNET#2If this option is selected, the template will be changed to SITEPAGEPUBLISHING#0 during migration.  
If this option is not selected, the template will be set to BLANKINTERNETCONTAINER#0 during migration.

3. For Schedule, select one of the following options:
  - **Run Now**
  - **Run Later** (to save the task for running at a later time)
  - **Schedule** (to specify a date and time to run the task)

When you finish configuring the migration task, a Summary displays, allowing you to review your options. You have the opportunity to change any options before running the migration task.

4. Click **Finish**.

You can monitor the progress of the task on the [Tasks](#) tab, as well as download a [migration job log](#).

**i** **NOTE:** Once a migration job has completed, it is deleted from Content Matrix and all tracking can be done in On Demand Migration - Hybrid Content Matrix.

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# Task Management

The Tasks tab lists the tasks that have been initiated throughout the migration process. You can:

- Track the progress of a task and view the results of finished tasks. When you select a task, the task details pane appears and displays the details the detailed information and statistics of the task.
- Filter and search to quickly navigate through the list of tasks.
- Edit tasks
- Start, stop, and delete tasks.
- Download a job log

## Editing a Task

From the Tasks list you can edit:

- a completed task
- a running task
- a task that has not started

### ***Editing a completed task***

You can edit a completed task. Depending on the schedule option selected you can:

- Automatically restart changed task in case **Run now** option is selected.
- Manually start changed task in case **Run later** option is selected. All changes will be applied after the task is restarted.
- Schedule the start for the changed task in case **Schedule** option is selected. All changes will be applied after the task is restarted.

**i** | **NOTE:** You cannot undo this operation after the wizard is finished to reset the edited task to initial settings.

### ***Editing a running task***

You can edit a running task to reuse or restart it. Depending on the schedule option selected you can:

- Automatically restart changed task in case **Run now** option is selected.
- Manually start changed task in case **Run later** option is selected. All changes will be applied after the task is restarted.
- Schedule start for changed task in case **Schedule option** is selected. All changes will be applied after the task is restarted.

**i NOTE:**

- Your changes cannot affect the task that is currently running.
- You cannot undo this operation after the wizard is finished to reset the edited task to initial settings.

**Editing a task that has not started**

You can edit task in case it is not started to change your run time settings. Depending on the schedule option selected you can:

- Automatically start changed task in case **Run now** option is selected.
- Manually start changed task in case **Run later** option is selected.
- Schedule start for changed task in case **Schedule** option is selected.

**i NOTE:** You cannot undo this operation after the wizard is finished to reset the edited task to initial settings.

## Stopping and Restarting Tasks

**To stop a running task:**

1. From the tasks list, select the running task that you want to stop
2. Click **Stop**.  
You will be prompted to confirm the action.

**i NOTE:** The task may take a few minutes to change state.

**To restart a stopped task:**

1. From the task list, select the stopped task that you want to restart.
2. Click **Start**.  
You will be prompted to confirm the action.

**i NOTE:** The task will restart from the beginning using the same settings.

## Downloading a Migration Job Log

From the Tasks tab, you can download a job log for migration task as an Excel file that contains the following information:

- JobID
- Title
- Source
- Target
- Status
- Status Message
- Created
- LicenseDataUsed
- Started
- Finished
- Upload Duration
- Total Duration

Fully detailed job logs are available in Content Matrix. See the Job Log Files section of the [Metalogix Content Matrix SharePoint Edition User Guide](#) for more information.

***To download a migration job log:***

1. From the Tasks tab, select the migration task for which you want to download a job log.
2. In the right, click **Download Job Log**.

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# Event Management

From the Events tab, you can view all notifications and alerts related to the environment configuration and migration process. It allows you:

- View all events related to the migration process.
- Select an event to see details related to the event on the right pane.
- Hide certain alerts from the list by using the **Acknowledge** option. This might be useful if you don't want to be distracted by the accidental warning or "expected" error.
- Explore details about selected events. See the details pane on the right pane of the screen for more details and statistics for the selected event.
- Export selected events into comma-separated values (csv) file for analytic or archival purposes.

**i NOTE:** Use search or filtering to quickly navigate to the points of interest.

Please consider the following:

Depending on selected migration options, the content is transferred in separate batches that can be submitted for processing at the same time. It can take a while before processing of submitted batches will be completed. To help tracking the migration, the status for batches that are processed will be reported approximately every 5 minutes.

# Troubleshooting

This troubleshooting section identifies some common issues that you may encounter when using On Demand Hybrid Content Matrix and suggestions on how to resolve them.

Note that factors unique to your environment, such as the size, configuration, and complexity of your environment as well as interactions between On Demand, Content Matrix, SharePoint, and other applications and processes, may also need to be taken into consideration.

## System Exception: Quest tenant [name] is not found

### Issue

The migration fails with the following error:

System.Exception: Quest tenant m365x88344394 is not found.

at Quest.QMMP.Handlers.ODMUtils.GetAccessToken(ICoreClient client, Guid orgId, String tenantUrl, String resource)

at Quest.QMMP.Handlers.ODMUtils.GetAccessToken(ICreateXCloudClientInfo config, Guid orgId, String tenantUrl, String resource)

at Quest.QMMP.Handlers.QmmpMessageHandler`1.GetAccessToken(JobMessage msg, String tenantUrl, String resource, ILogger logger, IJobNotification notifications)

### Possible Reason

The tenant uses a custom Url and the project has not been configured for the default SharePoint Admin Center Url.

### Resolution

[Configure the project](#) to use the default SharePoint Admin Center Url.



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## Technical support resources

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at <https://support.quest.com>.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product