# Quest® Content Matrix 9.13

# Release Notes

## June 2026

These release notes provide information about the latest Quest® Content Matrix release.


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## New Features

Version 9.13 of Content Matrix introduces the following features and changes:

- Added support for Microsoft 365 Entra ID certificate-based authentication to provide a secure, non-interactive login option for migrations.
- ADFS authentication is removed from Content Matrix connection options and is no longer supported.
- Enabled Entra ID-based access for Azure Blob Storage Import Pipeline, replacing SAS tokens with certificate-based authentication for improved security and flexibility.
- Updated migration job status tracking in the GetMigrationJobProgress API to replace Azure Queue for job status events.
- For SharePoint Edition:
  - Alerts are no longer migrated to SharePoint Online targets.
  - Information management policies (retention policies) are no longer migrated to SharePoint Online targets.
  - InfoPath form templates are not migrated to SharePoint Online due to the retirement of InfoPath Forms Services. When a SharePoint Online target is detected, InfoPath form templates are automatically skipped and a warning is logged.

- Legacy ADFS username/password authentication (OAuthUserPassAuthentication) is removed from TaxonomyExplorer. All OAuth authentication now requires an interactive flow (browser-based sign-in or device code).

# Resolved Issues

| Description | Work Item | Case No. |
|---|---|---|
| User permissions in File Share Edition are not migrated if mapped users do not exist in the target SharePoint site. | 559589 | CR-100999 |
| Overwrite options in File Share Edition are not supported when using the Import Pipeline. | 560775 | — |
| User Mapping CLI fails to authenticate with GCC tenants and displays a “Not supported in your system” error. | 559323 | CR-101215 |
| The **Created** field in the target list displays an incorrect value when the source `Created` and `created_x0020_date` columns contain different values. | 559503 | CR-101708 |
| The **Modified** field on the target site displays local time instead of UTC during File System to SharePoint Online migrations using the Import Pipeline, causing files to be incorrectly skipped. | 560840 | — |

# Known Issues

The following is a list of issues, including those issues attributed to third-party products, known to exist at the time of release.

# All Editions

**Connecting to SharePoint**

| Description | Issue ID |
|---|---|
| In a FIPS-enabled environment, connections to SharePoint 2019 using the local or remote object model (OM/MEWS) fail.<br>WORKAROUND (SharePoint Edition only): Use a database connection for SharePoint 2019 in a FIPS-enabled environment. | 520031 |

**Multi-factor Authentication**

| Description | Issue ID |
|---|---|
| • If a non-MFA (Mult-factor Authentication) user who has created SharePoint Online site-level connections is converted to an MFA user, when the connections are refreshed via the Content Matrix Console, they remain active instead of being disconnected.<br>WORKAROUND: Relaunch Content Matrix and re-run the migration. | 389424 |

**Logging**

| Description | Issue ID |
|---|---|
| • Unable to see all rows in LogItems tab in Excel when there are too many rows in the exported Job Log | 512353 |

# SharePoint Edition

**Connecting to SharePoint**

| Description | Issue ID |
|---|---|
| • In a FIPS-enabled environment, connections to SharePoint 2019 using the local or remote object model (OM/MEWS) fail.<br>WORKAROUND: Use a database connection for SharePoint 2019 in a FIPS-enabled environment. | 520031 |
| • In a FIPS-enabled environment, connections to SharePoint Server Subscription Edition using the local model (OM) fail.<br>WORKAROUND: Use a database or remote object model (MEWS) connection for SharePoint Server Subscription Edition in a FIPS-enabled environment. | -- |

**Migration to SharePoint Online**

| Description | Issue ID |
|---|---|
| • 403 error is thrown when creating Site Collection at tenant-level | 251718 |

| Description | Issue ID |
| --- | --- |
| WORKAROUND: Keep the tenant open in the browser, restart the Console, and perform migration. | |
| • Large document (50MB or greater) fail to migrate to SharePoint Online only when the Content Matrix Console is installed on client (non-SharePoint) machine using a SharePoint 2013 or 2016 database connection. | 426597 |
| • While migrating a site from SharePoint 2016 (using an OM connection) to SharePoint Online, an *Index was out of range* error is logged. | 420126 |
| • File migration fails when migration is done via the Import Pipeline and file is already present at destination when copy list or copy folder is run.<br>WORKAROUND: Delete existing items on target, and re-migrate. Or, if the existing items have not been changed, the error can be disregarded because the rest of the migration will complete successfully. | 204168 |
| • When migrating items with versions from an Issue Tracking list the version numbers are not preserved. While all of the versions and metadata are migrated, the version numbers are slightly off.<br>NOTE: This is due to a current bug in the Import Pipeline. | 180924 |
| • Custom Content Types on "Folders" do not get applied on the target, when migrating to SharePoint Online (SPO) using the Import Pipeline. By default all folders get tagged with the "Folder" Content Type instead. | 194826 |
| • Content Matrix is showing incorrect logs if a user is trying to migrate a list which contains corrupted attachments to a SPO site using the Import Pipeline. | 417164 |
| • When migrating a list with checked out items using the Import Pipeline, a fatal error occurs for those | 439422 |

| Description | Issue ID |
| --- | --- |
| items because Content Matrix is attempting to migrate them as the latest version. | |
| • When migrating documents from SharePoint 2016 database connection using the Import Pipeline, a new version is added on target for checked out document. | 507525 |
| • The hidden list "DO_NOT_DELETE_SPLIST_SITECOLLECTION_AGGREGATED_CONTENTTYPES" is displayed in the Content Matrix tree view. | 506828 |
| • Mapped Users are not getting displayed on target for 'Created by' column when migrating from SharePoint 2016 to SharePoint Online. | 504946 |
| • When migrating using the Import Pipeline, the migration may hang when trying to process large documents. | 529117 |

**Migrations from Publishing Site to Communication Site**

| Description | Issue ID |
| --- | --- |
| When migrating from a Publishing Site to a Communication site, custom Community content types are not migrated to the target.<br>WORKAROUND: Create a Communication site collection on the target and activate SharePoint Server Standard Site Collection features before migrating the content. | 483623 |

**Migrations from SharePoint Online to SharePoint on-premises**

| Description | Issue ID |
| --- | --- |
| • Migrations from SharePoint Online using a CSOM connection to SharePoint on-premises failing with "Unable to obtain SharePoint Online authentication cookie" message. | 408023 |

**Locked Site Collections**

| Description | Issue ID |
|---|---|
| • A locked source site collection won't allow a migration to complete when set to "No Access."<br>NOTE: This is by design as SharePoint will not allow access to the content. | 115704 |

**Community Site Migration**

| Description | Issue ID |
|---|---|
| • The migrating account always gets added to a Community Site Members list at SPO target when a CSOM connection is used. | 232167 |
| • Members of a Community Site Member list are not copied on SPO using CSOM.<br>WORKAROUND: Use the Import Pipeline. | 232176 |
| • Map missing user Option is not updating metadata for Member list of Community Site when mapping multiple source users to a single target on Community Sites.<br>NOTE: Should multiple source users be mapped to a single target user when migrating a Community Site, the metadata values of that user in the target Member List will not concatenate the total metadata values from the source. This will only reflect the user with the most recent migration. | 233345 |
| • Metadata will always get copied with Member List with Community Sites.<br>NOTE: When migrating ONLY the members list from a source Community Site to the target, the metadata for the list is set (even if the relevant Discussion list is not migrated). This is a narrow scenario. The workaround is to migrate the Member List as part of a larger migration.<br>WORKAROUND: migrate the Member List as part of a larger migration. | 233278 |
| • Gifted badge values are not getting migrated properly in a community site Member list. | 232168 |
| • Best Reply inside discussion list is not migrated on target when migrating from SharePoint 2016 Community Sites. | 233283 |

| Description | Issue ID |
|---|---|
| WORKAROUND: Migrate the Member List as part of a larger migration. | |
| • When using a CSOM connection on a SPO target, duplicate replies are created inside discussion list in case of incremental migration of Community Sites.<br>WORKAROUND: Use the Import Pipeline. | 233290 |
| • When using the Import Pipeline, the 'PostedBy' column value is not preserved when target is a Community Site.<br>WORKAROUND: Migrate using CSOM only. | 233554 |

**Blog Site Migration**

| Description | Issue ID |
|---|---|
| • Warning *Mapped template '301' to 'CustomList' as '301' does not exist on the target* is logged when migrating blog sites with "Clear Default features on Target" option when migrating to SharePoint Online.<br>WORKAROUND: Do not change the default selected option which is "Preserve default Features on target" | 180900 |

**Publishing Portal Migration**

| Description | Issue ID |
|---|---|
| • Unable to create or paste a Public Publishing Portal template (EHS#2) as Site when migrating to SharePoint Online.<br>NOTE: This template is unavailable in SharePoint Online. | 203983 |

**MySite Migration**

| Description | Issue ID |
|---|---|
| • Copying MySite Social Collaboration "Note Board" Web Part is not supported in SharePoint 2013 to SharePoint 2013 migrations. | 176692 |
| • "Access is denied" error observed during the MySite Migration from SharePoint on-premises to SharePoint | 179036 |

| Description | Issue ID |
|---|---|
| Online when trying to update a read only content type.<br>NOTE: During the first 24 hours after user creation, this error will not occur. However, after that time, admins should enable the 'Allow Users to run Custom Scripts' setting in SharePoint Admin Settings. | |
| • Theme setting are not migrated to the Tenant with 'Paste as Site Collection' option. | 120266 |
| • When migrating MySites from a 2013 or 2016 source to a 2016 or 2019 target, the error Server was unable to process request. ---> The system cannot find the file specified is logged for web parts of default lists/libraries.<br>NOTE: Make sure the Copy Other Root Files/Folders option is selected on the Site Options tab. (This is expected behavior.) | 420301 |
| • When a document is shared with a user is migrated from SP2019 to SPO, the date shared column in OneDrive shows the migrated time rather than the actual time the document was shared with user in source. | 498644 |

**Permissions Migration**

| Description | Issue ID |
|---|---|
| • The exception message *You cannot customize permission levels in a web site with inherited permission level* is logged.<br>NOTE: Content Matrix does not currently support permission level migrations over the CSOM or SPO/Tenant connection types. | 181193 |
| • Permission inheritance not always preserved for item level permissions on incremental copy.<br>WORKAROUND: Perform a permissions-only migration (e.g. Paste Site Objects > Permissions) after the incremental migration completes. | 179750 |
| • Permissions for items in an Access Request list are duplicated when running a Paste Site > All Site | 178409 |

| Description | Issue ID |
|---|---|
| Content migration for the second time.<br>WORKAROUND: When running a “Paste All Content” migration, set the “Migration Mode” tab to use the “Custom Copy” option with the “Preserve existing” checkbox selected, instead of using the “Full Copy” option. | |
| • Permissions will not be migrated from a SharePoint 2016 source using an OM or MEWS connection if Optimized mode is enabled.<br>• The User Profiles "is site searchable" property will not be migrated from a SharePoint 2016 source using an OM or MEWS connection.<br>NOTE: These limitations exist because DBWriting is not supported. | 427061 |

**Web Parts Migration**

| Description | Issue ID |
|---|---|
| • Analytics HashTag web parts are not migrated. | 482598 |
| • Closed Note Board and Tag Cloud web parts migrate as open on target. | 470877 |
| • Closed Web Parts associated with a List Form are not been migrated to the target. | 316653 |
| • The error *A Web Part or Web Form Control on this Page cannot be displayed or imported. The type Microsoft.Office.Server.Search.WebControls.SearchBoxScriptWebPart, could not be found or it is not registered as safe.* is logged for the search box on a SPO target after a migration using the Import Pipeline.<br>WORKAROUND: Migrate using CSOM only. | 482669 |

**Alert Migration**

| Description | Issue ID |
|---|---|
| • Migration of alerts using Paste Site Objects > Alerts action are skipped when there are users mapped for other sites.<br>WORKAROUND: Remove the mappings and recreate them for the target in order to migrate. | 181067 |
| • Alerts will not be migrated from a SharePoint 2016 source using an OM or MEWS connection if Optimized mode is enabled. | 427061 |

**Content Type Migration**

| Description | Issue ID |
|---|---|
| • When copying a list, if the configuration option "Apply new content types" is selected, the content types that are not present on source get hidden on the target. | 182147 |
| • When copying a content type resource file, resource folder, or resource folder for list to a SharePoint 2019 target that includes Nintex features, an *Exception: Server was unable to process request* error is logged. | 448210 |

**Document Set Migration**

| Description | Issue ID |
|---|---|
| • Document Sets are not migrated correctly when the Document Set Features is not enabled.<br>WORKAROUND: Activate the feature at the target and re-migrate. | 204343 |
| • The migration account user is not added inside the Document Set Version History metadata when there is no user mapping for the actual user account.<br>NOTE: When migrating Document Set snapshots (versions), if the user account in the snapshot metadata has not been mapped and the user account cannot be found, then Content Matrix | 294432 |

| Description | Issue ID |
|---|---|
| will not default to the migrating account. Instead Content Matrix will try to apply the user account using the “Migrate missing AD user” methods for SPO targets. | |

**Records Center Migration**

| Description | Issue ID |
|---|---|
| • When migrating a Records Center to SharePoint Online:<br>▪ For a Classic Team Site with Record Center features activated, an error for the RCConsole.aspx page may occur, preventing the the [Submit a Record] button on home page from working on the target team site.<br>▪ Content Organizer Folder partitioning settings only work for the root folder of a library/list, not for subfolders within it.<br>▪ Record Center Quick launch links are not migrated. | 430663 |

**General List, Folder, and Item Migration**

| Description | Issue ID |
|---|---|
| • Content Matrix Jobs get inconsistently stuck in the "copying document" action for migrating documents and document libraries.<br>NOTE: This is typically caused by a corruption in the document itself. If you try to manually upload the same file to the new SharePoint environment, you will also see a delay in the upload. For Content Matrix, it looks like the migration job is ‘stuck’ but the job is actually waiting for SharePoint to respond before continuing the rest of the migration. | 245657 |
| • When trying to migrate a folder with the “Copying Folder” option, the message Unable to add folder 'This operation can only be performed on a file' error is returned. | 171550 |

| Description | Issue ID |
| --- | --- |
| NOTE: This is an issue with "_files" which are special folders in SharePoint. These types of folders get created when you export an HTML page using IE. IE will save all the dependent files in a "_files" folder. If the user then uploads the HTML page to SP, IE will also automatically pick up the dependent files in the "_files" folder. These folders become hidden and you cannot access the files via the SharePoint OM calls. | |
| • 'Copy Folder Permissions' is disabled in the List Content Options when copying/pasting a custom SharePoint 2007 list via the Paste List Action.<br>WORKAROUND:<br>▪ Run the migration using the Copy/Paste Site action.<br>OR<br>▪ Run a separate permissions copy action after the "Paste List" action has been completed. | 181170 |
| List item versions created before the approved version are missing after migration from 2010 using a Database connection to 2013 using a local object model (OM) or client side object model (CSOM) WORKAROUND: Use an OM or MEWS connection for the source. | 176588 |
| • When migrating from SharePoint 2007 (using the MEWS connection) into SharePoint 2013/2016 (MEWS or CSOM connections) or SharePoint Online (SPO) there are some cases where version metadata values can be lost. This mainly seems to occur when the items/documents are using a custom content type and have versions.<br>WORKAROUND: Ensure that the custom content type that is used on the exists on the target before the item/document migration has been run. (You may also need to select the 'Apply new content type during copy' option in the in the job configuration.) | 181383 |

| Description | Issue ID |
| --- | --- |
| • Custom List Forms created in SharePoint Designer are not being migrated on list or site copy when using a database connection.<br>WORKAROUND: Use an OM or MEWS connection. | 179625 |
| • Document versions fail to migrate when author/editor are not mapped (DB to tenant).<br>NOTE: The user accounts that populate the 'Created By' and 'Modified By' fields for document versions must be mapped to the appropriate target SPO user accounts in order to migrate these values correctly. If the user accounts are not mapped to the target, the values will not be preserved. | 201631 |
| • Moderation status values are not preserved when migrating Video files from a SharePoint 2007 Publishing Library to SharePoint 2013 or later. | 276875 |

**Access Request List Migration**

| Description | Issue ID |
| --- | --- |
| • User Name value for the first message of an Access Request list's conversation history is not preserved.<br>NOTE: This is behavior is observed only for the first message in the conversation history. All the other conversations after that bear correct name which is same as that of the source. | 180492 |
| Access Request Items are not migrated in Subsites when running a migration using the Paste Site Content > All Subsites option. | 179462 |
| The migration of all the large files greater than 2GB with versions with an .aby extension fail to migrate, with the error *We're having trouble with SharePoint storage* | 520957 |

**Task List Migration**

| Description | Issue ID |
| --- | --- |
| • Unable to migrate a Task list from SharePoint Online (SPO) to SP 2013 when a child Task has an earlier ID than the parent Task.<br><br>NOTE: While not directly restricted to SPO > SP 2013 migration, the issue is that in the task list there is a Parent Task that has a higher ID then it's child Task. This isn't possible through the normal SharePoint UI and is the result of either a modification or a custom template change.<br><br>For example, If the parent Task has an ID value of 7 but the child Task has a ID value of 4. The parent typically needs to exist before the child, so users should never be able to create this scenario without direct modification.<br><br>When a migration of Tasks in this state occurs it returns the error message:<br>Exception: AddListItem - No ObjectXml [The list item could not be inserted or updated because invalid lookup values were found for the following field(s) in the list: [Parent ID]. | 194778 |
| • After migrating a SP 2010 Tasks list to SP 2013, users are unable to select the Task list in the drop down for Timeline Web Parts.<br><br>NOTE: In SharePoint 2013 there are two types of Tasks lists, and each uses a different Template value. They are: Tasks (template = 107) and TaskWithTimelineHierarchy (Template = 171). In this case the SP 2010 Task list is migrated using the 107 template, but on the target, the users is trying to use the 171 template.<br><br>WORKAROUND: It is possible to use a Transformer to catch and convert the template type that is being used, so the Task list is added as the TaskWithTimelineHierarchy template instead. Refer to the Support KnowledgeBase article https://support.quest.com/metalogix-content-matrix/kb/336838. | 194730 |

**Survey List Migration**

| Description | Issue ID |
|---|---|
| • The “Allow multiple responses” setting value turns from “Yes” to “No” after survey migration.<br>NOTE: The “Allow Multiple Responses” setting value for Survey Lists is not currently supported. | 181216 |

**Page Migration**

| Description | Issue ID |
|---|---|
| • Migrating an out-of-the-box Master Page that has been modified to have versions from a SP2007 source to a SP2013 or later target fails with an error on fetching the version metadata.<br>WORKAROUND: Copy Master Pages with versioning turned off. | 182519 |
| • (SP 2007 OM/MEWS/ DB sources only) The first Wiki page fails to migrate for chained Wiki pages and returns the error message Cannot complete this action. Please try again. | 171548 |
| • Wiki Pages and Web Part Pages that have been customized using SharePoint Designer (SPD) are not displaying their Page contents on the target after migration.<br>NOTE: When migrating Wiki Pages, Content Matrix use the “WikiField” sub-section to migrate content, and for Web Part Pages the “Web part zones” sub-section is used. Both of these are inside the “PlaceHolderMain” section of the page. If the “PlaceHolderMain” section, or the “WikiField”/”Web part zones” sub-section(s) are removed from the page during the customization, then Content Matrix will not be able to migrate the page contents to the target. | 194745 |
| • Custom master page migration is not supported for 2010/2013 DB source.<br>WORKAROUND: Use an OM/MEWS connection when migrating custom master pages. | 179198 |
| • When using a Database source connection, Page Layouts for pages that have custom page layouts are | 181072 |

| Description | Issue ID |
| --- | --- |
| not preserved at destination.<br>WORKAROUND: Use an OM or MEWS connection. | |
| • After migrating a Site Collection, Theme Pages like DesignGallery do not load for Site Owners from the root.<br>NOTE: Starting with SharePoint 2013, the migrating account needs access to the Master Page Gallery to change the 'look' of a page. | 178382 |
| • When migrating from SharePoint Online source to a SharePoint Online target and the ”Copy Customized Form” or “Copy List Form” option is selected,, the error 'Object reference not set to an instance of an object on server. The object is associated with property ModifiedBy. Is thrown. | 204252 |

**Settings Migration**

| Description | Issue ID |
| --- | --- |
| • When using the CSOM adapter to migrate to SharePoint 2013 on-premises, “Launch forms in dialog?” settings are not migrated.<br>WORKAROUND: Use OM/MEWS as the target adapter. | 179058 |
| • Theme setting are not migrated to the Tenant with ‘Paste as Site Collection’ option. | 179060 |

**Managed Metadata Migration**

| Description | Issue ID |
| --- | --- |
| • When performing Folder and Item level migrations with the "Skip Keywords term set migration" option checked, Keywords associated with .jpg files are copied to target Term Store. | 512354 |
| • Empty MMD Field value in versioned list migrates as non-empty value for all open xml file formats. | 124696 |

| Description | Issue ID |
|---|---|
| WORKAROUND: This is due to property promotion behavior in SharePoint for MMD columns. This can be bypassed by checking the option “Disable SharePoint Document Parsing” under “List Content Options.” | |
| • Migrations return different results for document migrations with the Managed Metadata and GUID Mapping options enabled, when migrating using the CSOM adapter or the Import Pipeline options on the target connection.<br>NOTE: When migrating Managed Metadata (MMD) over a CSOM connection, SharePoint will return information to Content Matrix if the terms are valid or not. When migrating MMD using the Import Pipeline, SharePoint doesn’t have a way to return information on if the terms are valid or not to the container.<br>This means that the logging and end results of migrating MMD using the Import Pipeline or CSOM will look slightly different, and can sometimes result in the terms migrated using the Import Pipeline having a red line under them, indicating that the terms may not be valid. | 271320 |

**Column Migration**

| Description | Issue ID |
|---|---|
| • When migrating to SharePoint Online, mapped users are not getting displayed on target for 'Created by' column | |
| • When migrating a SP 2010 list that contains a BCS column an “Error: AddListItem – No ObjectXml” message is returned.<br>NOTE: This is cause by Content Matrix trying to fetch the data from a Database table, but a different column is set as the “Identifier” column.<br>WORKAROUND: Refer to the Support KnowledgeBase article Null was returned to FindSpecific" error message when adding list items with BCS columns. | 307507 |
| • When web parts are added to a page after column validation settings have been activated, the web parts conflict with the validation settings and the error is thrown.<br>• Lookup column referencing the same library in which it is present does not migrate. (Work Item 182112). | 281741 |

| Description | Issue ID |
| --- | --- |
| NOTE: This is only applicable for Document Libraries and is not supported in that instance. | |
| The issue "*Exception: AddList - Error [The formula refers to a column that does not exist.]* occurs when special characters are present in column name used in formula for validation settings | 521774 |

**OneNote Notebook Migration**

| Description | Issue ID |
| --- | --- |
| • Out-of-the-box One Note Notebooks are created o the target with the source site's title. | 420302 |

**InfoPath Migration**

| Description | Issue ID |
| --- | --- |
| • When copying a site that has browser enabled InfoPath forms there is an exception migrating to SharePoint Online. | 204356 |
| • Authorship Metadata is not preserved when migrating Customized Info Path forms.<br>Because the relevant files live at the root, they will always be created with the currently logged in user (the connecting user account in Content Matrix) and they cannot be updated. This is a SharePoint limitation. | 256779 |

**Nintex Forms Migration**

| Description | Issue ID |
| --- | --- |
| • When migrating Nintex Forms to a 2019 target, the error *Server was unable to process request. ---> Save Conflict* is logged for the content type resource file; however the forms are on the target without issue. | 448210 |
| • "StatusCode: 500, ReasonPhrase: Internal Server Error" is thrown when Copying Nintex Forms while migrating with a multi-factor authentication user account using Web Browser Authentication. | 437432 |

**Workflow Migration**

| Description | Issue ID |
| --- | --- |
| • SPD workflows are not successfully migrated to an SPO target. | 480545 |
| • Workflow Histories are always migrated for SharePoint 2010 and never migrated for SharePoint 2013 and later, regardless of whether workflow instances are also migrated. This is also true of Nintex workflows, regardless of whether the option "Preserve Nintex Workflows instance history" is checked. | 451908 |
| • Renamed list and web workflows fail to migrate when workflows are renamed with the Console open.<br>WORKAROUND: Re-launch the Console after renaming the workflows. | 404724 |
| • Out-of-box 2007 workflow association cannot be opened after migration in SP 2013.<br>WORKAROUND: Activate 2007 workflows on the target. | 99326 |
| • When migrating a SP 2013 SPD workflow from a CSOM source connection to a Site Collection that is set to “Read Only”, the migration fails.<br>WORKAROUNDS:<br>▪ Switch connection types on the source and use the Local (OM) or Remote (MEWS).<br>OR<br>▪ Manually turn off the “Read Only” setting on the source. | 283742<br>273643 |
| • The Workflow status column for SPD reusable and SPD globally reusable workflows with versions and workflow instances is changed to name of first version of SPD workflow after migration. | 204376 |
| • SPD Global Reusable workflow migration not supported with Copy Site > Paste All Site Content,<br>WORKAROUND: Use the “Paste as Site Collection” action, which is encouraged for these types of migrations. | 204377 |

| Description | Issue ID |
|---|---|
| • An exception is thrown when performing copy site -> paste as subsite/all site content second time and Nintex app is present on target site.<br><br>WORKAROUND: Content Matrix cannot currently delete a SharePoint site while it contains any SharePoint App/Add-In. | 252485 |
| • Nintex workflows having the Calculate a Date activity with the option “Use date when action is executed” do not migrate from SharePoint 2007 to SharePoint Online. | 253468 |
| • Nintex workflows containing custom variables in the “Pause For” activity do not have the variables migrated to SharePoint Online.<br><br>NOTE: This is currently not supported and the variables are being tagged as comments instead. | 254006 |
| • When Nintex workflows are migrated using a DB source connection and a MEWS target connection, the Nintex Workflow image is not displayed. | 419875 |
| • The error *407 Proxy Authentication required* is logged when you try to migrate Nintex workflows if:<br><br>▪ Content Matrix is using a proxy that has been imported from Internet Explorer<br><br>AND<br><br>▪ the proxy server is configured as "Permit Only" with Username/Password authentication.<br><br>WORKAROUND: Run the "Proxy Login Automator" script as described in the '407 Proxy Authentication' article located in the The remote server returned an error (407) Proxy Authentication Required (262696). | 408256 |

**Incremental Migration**

| Description | Issue ID |
|---|---|
| • Custom folder content type Metadata is not migrated during incremental migration from SharePoint 2010 to a SharePoint Online target. | 181984 |

**Distributed Migration**

| Description | Issue ID |
|---|---|
| • If a migration is performed from SharePoint on-premises to SharePoint Online and a proxy is configured using both IP address and username/password, the message *Unable to obtain SharePoint Online authentication cookie* is logged.<br>WORKAROUND: Refer to the Quest Knowledge Base article Unable to obtain SharePoint Online Authentication cookie. | 409813 |

**Multilingual Migration**

| Description | Issue ID |
|---|---|
| • The Home Page is duplicated in Site Pages library, one in the source language and one in with target language. However the page that is *displayed* is in the proper language. | 483173 |
| • Out of box groups are duplicated at the target, one in the source language and one in with target language. | 482885 |
| • Some links in quick launch and out of the box column name are displayed in Italian when an English user is logged in. | 514343 |
| • Depending on the source/target language combination, navigation structure may display in the source language at the target. | 481317<br>473180 |
| • Excel Service Viewers group gets duplicated when performing migration from Italian source to English target | 514488 |
| • English Site migrated via CM is displayed with mixed language after configuring Language Settings to display non-English language | 472123 |
| • The title of Document Library or any OOB libraries remains in the default site language on target after migration from a different language source site. | 528039 |

**StoragePoint**

| Description | Issue ID |
|---|---|
| • Migration of externalized files greater than the Web application limit is not supported, even when 'Large File Support' feature is activated. These files are downloaded with an .aspx file extension when the Save File to Disk option is used. | 507783 |

# File Share Edition

| Description | Issue ID |
|---|---|
| Getting error Failed to copy document: The request failed with the error message: while migrating large files if EnableChunkedTransfer flag is set to False.<br>Workaround: Set "EnableChunkedTransfer" flag to true in the Environment setting file. | 547602 |
| Storage Point migrations for Large files (above web app limit ) is currently not supported in File Share ( --->Failed: Failure: The file size exceeds SharePoint's reported maximum file size of 1540 MB)<br>Workaround: Add files (greater than web app limit) directly on target site\List where Storage Point is configured. | 547600 |
| For an SCM report, the Add\Remove Filters option is not working properly for applying the Matches filter on the source (Source connection node > Add Filters).<br>Workaround: Use the Filter Options > Matches option while configuring the job and avoid adding filters directly on source connection. | 547599 |

# Public Folder Edition

**Exchange Server - MAPI and/or Redemption Connector**

| Description | Issue ID |
|---|---|
| Exception "A text field contains invalid data" is thrown in Public Folder Edition while migrating some data using MAPI and Redemption connectors | 397853 |

**Migration Using SPO Containers**

| Description | Issue ID |
|---|---|
| After re-running Paste Exchange Folder job, Items are duplicated on target when job is configured selecting | 408273 |

| Description | Issue ID |
|---|---|
| overwrite and unchecking Use SPO Container O365 Upload option. | |

# Version History

New Features and Resolved issues from previous versions are listed below.

# Version 9.12

**New Features**

- For SharePoint Edition:
    - You can now import user mappings from XML and CSV files, and existing user mappings can be exported into a CSV file.
- For File Share Edition:
    - The Migration from CSV action can be run using the `Migrate-FsContentUsingCsv` cmdlet in PowerShell, instead of through the Content Matrix Console.
    - For migrations to SharePoint Online that use the Import Pipeline, you can monitor the progress of the job, including Microsoft-side processing, via the **Microsoft 365 Migration Jobs** window. This window is available in SharePoint Edition and File Share Edition.
    - You can configure global (user and/or group) mappings as part of a full migration or as a separate action. Global mappings are not migration-specific but rather apply to all environments to which Content Matrix is connected.
- Content Matrix Console now uses Microsoft Edge (Chromium) WebView2-based browser instead of Internet Explorer for SharePoint connections using web browser authentication. If Microsoft Edge (Chromium) is not installed and you are using the legacy Internet Explorer, Content Matrix automatically falls back to the legacy Internet Explorer-based authentication.
- You can stop any queued or running batch.
- Support for Nintex Workflow for Office 365 will end in December 2025, and will stop functioning entirely in April 2026, due to the deprecation of the SharePoint app model and workflow engine. Content Matrix no longer supports migrating Nintex Workflows to SharePoint Online targets.
- Content Matrix now supports hierarchical nodes by allowing you to connect a parent folder in Content Matrix and include its child folders in the CSV file. Any subfolders under the connected parent folder will be recognized during migration. This is applicable for SharePoint connections also where customer can create a single Farm\Web Application\ Tenant level connection and use any site in the CSV file. It is no longer necessary to create individual connections.

**Resolved Issues**

| Description | Work Item | Case No. |
|---|---|---|
| When migrating data from File Share Edition to SharePoint Online without copying permissions, all permissions on the document library on the target are wiped out. | 556173 | CR-91194 |

# Version 9.11

**New Features**

**9.11.3**

- TLS 1.3 is supported.
- .NET 4.8 is required for running the Content Matrix Console client application.
- For SharePoint edition:
  - SharePoint group mapping has been implemented, which enables you to add the membership of SharePoint groups on the source to existing SharePoint groups on the target while retaining existing members.
  - Large files (over 400 MB) can be migrated using OAuth with MFA authentication on the source if the Import Pipeline is used.
  - Only SharePoint Database (DB) connections are supported for SharePoint 2007.
- For to File Share edition:
  - File metadata can be modified and custom columns added using a CSV file.
  - Bulk migrations from a file system to a SharePoint target can be performed using a single CSV file.
  - User and group mappings can be imported from a CSV file, which is especially useful when mapping a large number of users and groups and also reduces loading time.

**Resolved Issues**

| Description | Work Item | Case No. |
|---|---|---|
| The issue "SPO To SPO : Issues with Large File Migrations (1.5 to 2 GB) with Oauth with MFA as source" has been resolved. | 549580 | CR-78385 |
| The issue "In File Share Edition, while creating folder getting File Not Found exception for Paste Folder action" has been resolved. | 552595 | CR-80310 |

| Description | Work Item | Case No. |
|---|---|---|
| The issue "Map Missing user mapping option failing with error *The remote server returned an error: (302) Redirect* for GCC target tenant" has been resolved. | 552185 | — |
| The issue "If compare Site operation is performed and rerun using Run Job Locally option, the job is getting failed with *Index out of range error*" has been resolved. | 283257<br>552680 | CR-80952 |

# Version 9.10

**New Features**

**9.10.0.3**

There are no new features in this release. See Resolved Issues.

**9.10.0.2**

There are no new features in this release. See Resolved Issues.

**9.10.0.1**

- Migrations from SharePoint Online to SharePoint Online are supported.
- The following Filter enhancements have been added to File Share Edition:
  - The Match filter for Sensitive Content Manager (SCM) content classification allows you to enter multiple values.
  - File Name, File Type, and Match filters allow you to specify criteria to either include or exclude text strings.
- The following functionality is currently not supported and has been removed from this version of File Share Edition:
  - Compare actions
  - File system reporting
- All references to manipulating and migrating custom metadata (which was not reintroduced in 9.9.0.1) has been removed from the documentation.
- Version 9.10 will be the last version to support SharePoint 2007 as a migration source and SharePoint 2013 as a migration target.

**Resolved Issues**

**9.10.0.3**

| Description | Work Item | Case No. |
|---|---|---|
| The issue "Access is Denied errors occur when trying to migrate a Site Collection to an SPO tenant connection" (which began occurring after Microsoft rolled out custom script changes) has been resolved. | 550803 | CR-75773 |
| The issue "Access Denied" finding object affected due to custom script changes" has been resolved. | 551464 | — |

**9.10.0.2**

| Description | Work Item | Case No. |
|---|---|---|
| The issue "For File Share Edition, an exception is thrown while importing an SCM report if SQL CE is not installed" has been resolved. | 550173 | — |

# Version 9.9

**New Features**

Metalogix Content Matrix has been rebranded as Quest® Content Matrix.

- Content Matrix File Share Edition has been reintroduced and includes two new features:
  - the option to truncate long folder paths and names to avoid migration errors due to SharePoint's character limit.
  - the SCM import feature, which allows you to import a .csv file that was exported from Quest® Sensitive Content Manager for migration to a SharePoint document library. You can also filter items by a sensitivity classification.
- Windows 8 is no longer supported.

# Version 9.8

**New Features**

- Windows Server 2022 and SQL Server 2022 are supported.
- Migration of externalized Metalogix StoragePoint (version 6.2 and later) content to and from SharePoint Subscription Server is supported.
- The performance of Job History data loading in the Console has been enhanced.
- RateLimit headers developed by Microsoft are being used to reduce throttling during migrations to SharePoint Online.
- For migrations initiated at the SharePoint list level, you now have the option to copy dependent lists (LookUp columns as well as Task and History lists associated with workflows).

- Taxonomy Migrator supports Web Browser Authentication.
- Public Folder Edition supports Exchange Public Folder versions 2013, 2016, and 2019.
- Content Matrix eRoom Edition has been removed from the product.

**Resolved Issues**

| Description | Work Item | Case No. |
|---|---|---|
| The issue "ListNamesToIncludeForAzure is not being applied when run remotely using Distributed Migration" has been resolved. | 535551 | CR-52351 |
| The issue "It takes 20+ minutes for Content Matrix to load Job History when the console is started" has been revolved by performance enhancements. | 532690 | CR-47426 |

# Version 9.7

**New Features**

- Content Matrix has been integrated with Quest On Demand Migration Hybrid Content Matrix.
- For a migration job to SharePoint Online that was run using the Import Pipeline and has batches with a Status of Failed or Warning, data associated with those batches is automatically included in the Support Zip File that can be sent to Quest Support for troubleshooting.
- You can import jobs that have been saved to an xml file using PowerShell. With this feature, you have the option of importing jobs that already exist in the Jobs Database with a new Job ID.
- Content Matrix complies with Microsoft's new API requirement, so a warning message that the SourceType field is missing will no longer display. Refer to the Microsoft article Migration API What's new | Microsoft Learn for details.
- A SharePoint database connection from a machine that does not have SharePoint installed now requires version-specific SharePoint dependencies, which are installed via a separate utility. If you are upgrading a client machine from a version earlier than 9.7, any existing database connections will no longer be available. Refer to the topic "Installing Metalogix Content Matrix Consoles" in the *Metalogix Content Matrix Advanced Installation Guide* for more information.
- .NET Framework 3.5 is no longer required to install Metalogix Extension Web Service (MEWS) or License Check.
- In Public Folder Edition, EWS is no longer supported as a source because Microsoft is deprecating EWS basic authentication.

**Resolved Issues**

| Description | Work Item | Case No. |
|---|---|---|
| The issue "Unable to export job logs to Excel or create Support zip files when file contains a special character" has been resolved. | 526776 | 5119754-1 |
| The issue "Incorrect syntax error is logged when migrating to SPO with chunking enabled" has been resolved. | 526679 | 5126448-1 |
| The issue "The added or subtracted value results in an un-representable DateTime" when exporting to Excel has been resolved. | 527008 | 5116627-1 |

# System Requirements

The following tables describe the hardware, software, and access requirements for Content Matrix Console. If our requirements are equivalent to, or less restrictive than a SharePoint requirement, it will not be described here.

# Hardware Requirements

| Component | Minimum Requirement | Recommended |
|---|---|---|
| Processor | Intel Core i7 | Intel Core i9, X-Series or higher |
| Memory | 16 GB | 32 GB |
| Disk Drives | Dual hybrid disk drives<br>C: OS and Program Files<br>D: Data Files | Dual SSD drives<br>C: OS and Program Files<br>D: Data Files |
| Network Card | 100 Mbps | 1Gbps |

# Software Requirements

| Component | Requirement |
|---|---|
| Operating System | Any of the following Microsoft-supported versions:<br>• Windows Server 2022<br>• Windows Server 2019<br>• Windows Server 2016 |

| Component | Requirement |
|---|---|
| | • Windows 11<br>• Windows 10<br>NOTE: While it is possible to run Content Matrix on an earlier version of the operating system, support cannot be guaranteed. |
| Database | Any of the following Microsoft-supported versions:<br>• SQL Server 2022<br>• SQL Server 2019<br>• SQL Server 2016<br>• SQL Server 2014<br>• SQL Server 2012<br>• A SQL Server hosted in Azure<br>• Azure SQL databases<br>NOTES:<br>▪ While it is possible to run Content Matrix on an earlier version of SQL Server, support cannot be guaranteed.<br>▪ The use of SQL CE in a production environment is discouraged because of the following limitations:<br>• It uses a single .lst file that is less robust and reliable and may be corrupted after the database reaches 4 GB.<br>• Data compression is not supported.<br>• Support for large objects is limited.<br>• Microsoft support for SQL CE has ended.<br>If you still want to use SQL CE, then SQL Server Compact 4.0 must be installed on the machine. You can download a copy from Microsoft. |
| Windows PowerShell | Content Matrix Console has the ability to run migrations using a pre-configured PowerShell console, provided that PowerShell Version 3.0 or later is installed prior to Content Matrix. |
| .NET Framework | Microsoft .NET Framework 4.8 (for each machine on which the Content Matrix Console is installed)<br>NOTE: Content Matrix cannot make a local Object Model (OM) connection on a 2010 environment, because SharePoint 2010 require an earlier version of the .NET Framework (v.3.5), which prohibits Content Matrix from completing the |

| Component | Requirement |
|---|---|
| | connection. Because of this, any migration 'jobs' configured to connect to SharePoint 2010 environments using a Local OM connection type will cease to work, and these jobs will need to be recreated for use over a different adapter type such as MEWS or DB. |

# Access Requirements

The below requirements are the standard set of requirements if you are installing Content Matrix on a non-SharePoint machine (i.e. installing on a machine that is not running SharePoint, but has access to the source and target environments).

If you are installing the Content Matrix client application directly on a target SharePoint Server or Web Front End (WFE), then you would need the same permissions that are required for installing the Metalogix Extensions Web Service (MEWS).

| Component | Requirement |
|---|---|
| Installing User | The user account installing on a SharePoint server, will require **Local Administrator** permissions on the local machine.<br>NOTE: The user account that is installing on a client machine only needs permissions to install a client application. Content Matrix Installer will attempt to elevate permissions as part of the installation process. |
| Application Pool Accounts | If connecting to a remote, on-premises instance of SharePoint the Metalogix Extensions Web Service can be used. This is a SharePoint solution file that is installed and will use the Application pool user account. |
| Connecting/Migrating Users | Permissions for connecting to SharePoint and migrating content vary, depending on the type of connection being made and the content being migrated. See User Account Access Requirements for details. |

# Product Licensing

You will be prompted to input an Activation License Key when launching the Content Matrix Console:

- for the first time after it has been installed if an existing license is not detected

OR

- after your license has expired.

NOTE: If users are not required to be a local administrators on the machine where Content Matrix is installed, every user who launches a Console needs to enter a license key. If users are required to be a local administrator, only the first user who launches a Console needs to enter a license key.

**IMPORTANT:** During installation, all Editions of the Console (SharePoint, File Share, and Public Folder) are installed. However, the license will only be activated for Editions that are covered by it. If an Edition is not covered by the license, the message *Invalid license: License key is not valid for the given product*. will display in the Activate License Key dialog. A license key that starts with 823, 824 or 827 will not work with File Share Edition since its reintroduction in version 9.9.

# Third Party Contributions

This product contains the following third-party components.

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