



# HarePoint Content And Workflow Migrator

For SharePoint Server 2010/2013, SharePoint Foundation 2010/2013 and SharePoint Online.



Product version 1.2  
December 10, 2013

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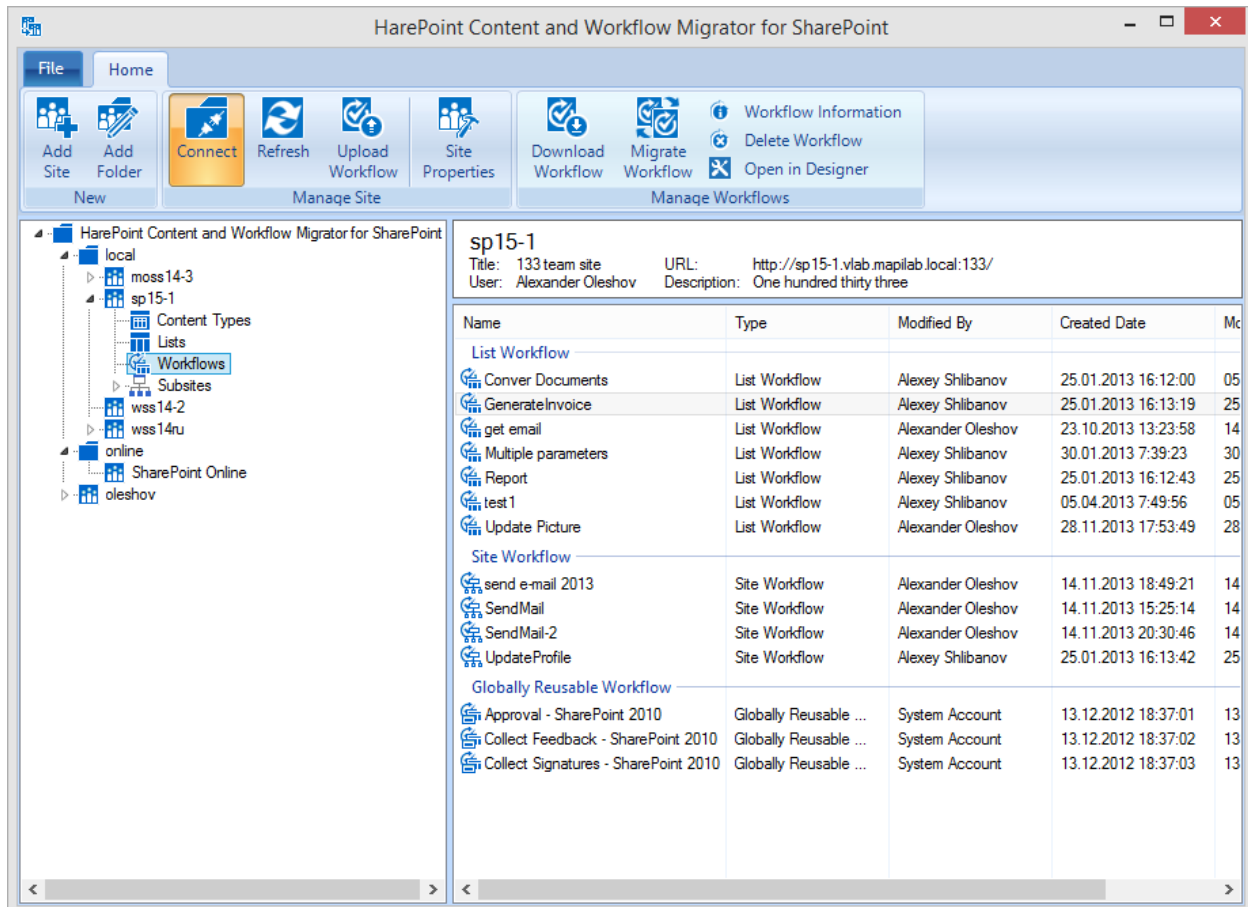
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## I. Introduction

Workflows, lists and content types are three the most important components of any SharePoint environment. One of the most common problem for SharePoint administrators is how to migrate them from one environment to another (in particular from Development to Production environment).











**HarePoint Content And Workflow Migrator for SharePoint** allows you to easily transfer workflows, lists and content types between SharePoint sites.



The product supports Office 365 and allows you to migrate workflow from/to SharePoint Online. Both 2010 and 2013 versions of SharePoint Online are supported.

We also recommend you to pay attention to the following products of our company:

- **HarePoint Workflow Scheduler for SharePoint 2010** is a free software product that allows automatic execution of SharePoint workflows by schedule. With its help, you can automate recurring business processes, debug your workflows with various sets of parameters, test server's performance by starting workflows with specified frequency.

Task Name	Enabled	Workflow Name	List Name	Triggers
Generate Invoices 	Yes	GenerateInvoice	Orders	At 45 minute every hour
Update Profiles 	Yes	UpdateProfile		At 3:30 AM every day
 Run now	No	ConvertDocs	Docs	At 30 minute every 3 hours
 Disable	Yes	Report	Orders	At Mon in 12:10 AM every week
 View Item	Yes	Report	Orders	At 1st day 5:46 PM every month
 Edit Item	No	ConvertImages	Photos	At 10/19/2011 12:30 AM
 Alert Me	Yes	Reminder		At 8:30 AM every day
 Manage Permissions	Yes	Report	Orders	At 10/10/2011 5:50 PM
 Delete Item				
 Add new item				

- 

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## II. Deployment

### 1. System requirements

HarePoint Content And Workflow Migrator for SharePoint is a desktop application that can run on the following versions of Microsoft Windows operating system:

- Microsoft Windows Server 2003 with SP1 or higher;
- Windows Server 2003 R2;
- Windows Server 2008;
- Windows Server 2008 R2;
- Windows Server 2012;
- Windows XP with SP2 or higher;
- Windows Vista;
- Windows 7;
- Windows 8.

The Product is also compatible with the following operating systems:

- Microsoft Small Business Server with SP1 or higher;
- Windows Small Business Server 2003 R2;
- Windows Small Business Server 2008;
- Windows Essential Business Server 2008;
- Windows Small Business Server 2011.

32-bit and 64-bit versions of the abovementioned systems are supported.

**Microsoft .NET Framework v3.5 or higher** is required before performing installation of HarePoint Workflow and Migrator for SharePoint. Microsoft .NET Framework v3.5 or higher is the component of Microsoft Windows Server 2008, Windows Server 2008R2, Windows Server 2012, Windows 8, Windows 7, and Windows Vista. In case of other operating systems the platform can be downloaded from the Microsoft [download center](#).

## 2. Supported versions of Microsoft SharePoint

HarePoint Content And Workflow Migrator for SharePoint is designed to work with:

- Microsoft SharePoint Server 2013,
- Microsoft SharePoint Server 2010,
- SharePoint Foundation 2013,
- SharePoint Foundation 2010,
- Microsoft Office 365 / SharePoint Online 2010,
- Microsoft Office 365 / SharePoint Online 2013 (only SharePoint 2010 Workflow platform type is supported).

## 3. Licensing and trial limitations

HarePoint Content And Workflow Migrator for SharePoint is licensed for a number of seats. Seat - is the user who has access to the Product inside the company's environment.

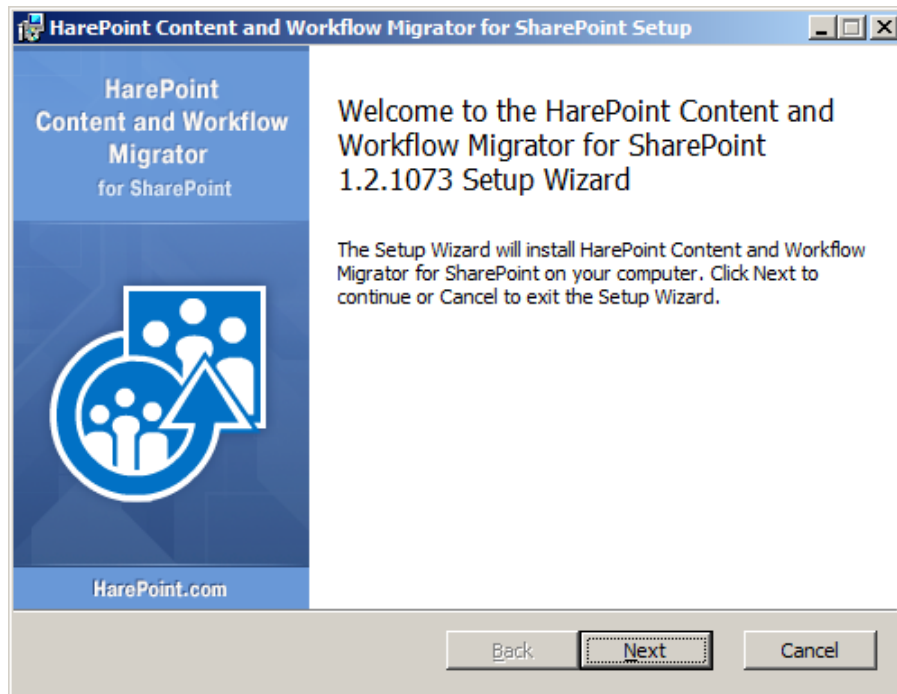
You may use the Product on the basis of one of two licenses:

1. **Trial License.** Provided automatically for a 30-day period to use the Product in organization's test environments. Trial version does not have functional limitations concerning content and workflows that can be migrated in SharePoint but it may not be used in SharePoint Production environments; such use violates the trial license agreement.
2. **Commercial License.** This license is purchased for a number of seats and allows using the Product in all organization's environments.

Please refer to Product page at <http://www.harepoint.com/> for more details about Product licensing.

## 4. Installing HarePoint Content and Workflow Migrator for SharePoint

To install the product simply run **HarePointContentMigrator.msi** from the program package and follow the installation wizard steps.



You can install the product on any computer in your organization which has access to the target SharePoint sites.

After installation the Product is ready to work.

Please refer to **Section III** of this manual for the Product overview.

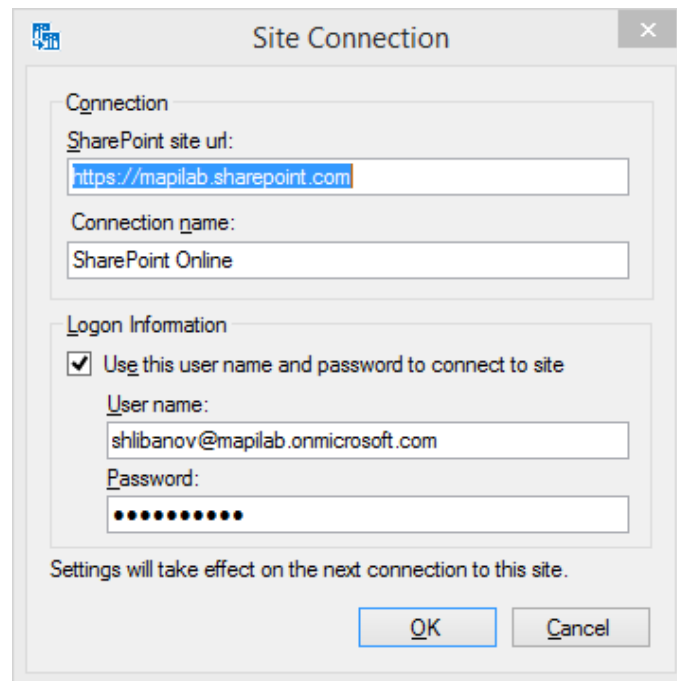


## III. Product Overview

### 1. Connecting to SharePoint site

To start working with the Product you need to add one or more SharePoint sites and connect to them.

To add new SharePoint site connection click “**Add Site**” button on the ribbon and enter site connection details:



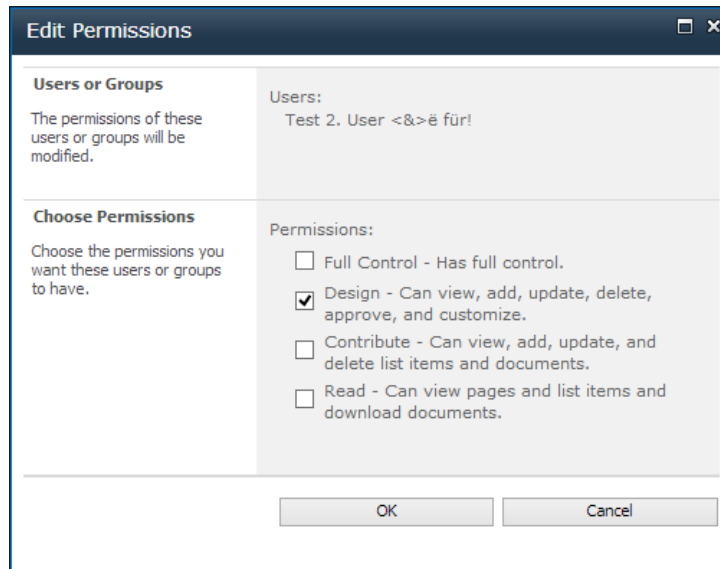
The screenshot shows a 'Site Connection' dialog box with the following fields and options:

- Connection**
  - SharePoint site url:
  - Connection name:
- Logon Information**
  - ☒ Use this user name and password to connect to site
  - User name:
  - Password:
- Settings will take effect on the next connection to this site.
- Buttons: OK, Cancel

By default, the program connects to the SharePoint site using the current user account. If you need to connect using a different user account, you can specify it in the “**Logon Information**” section.

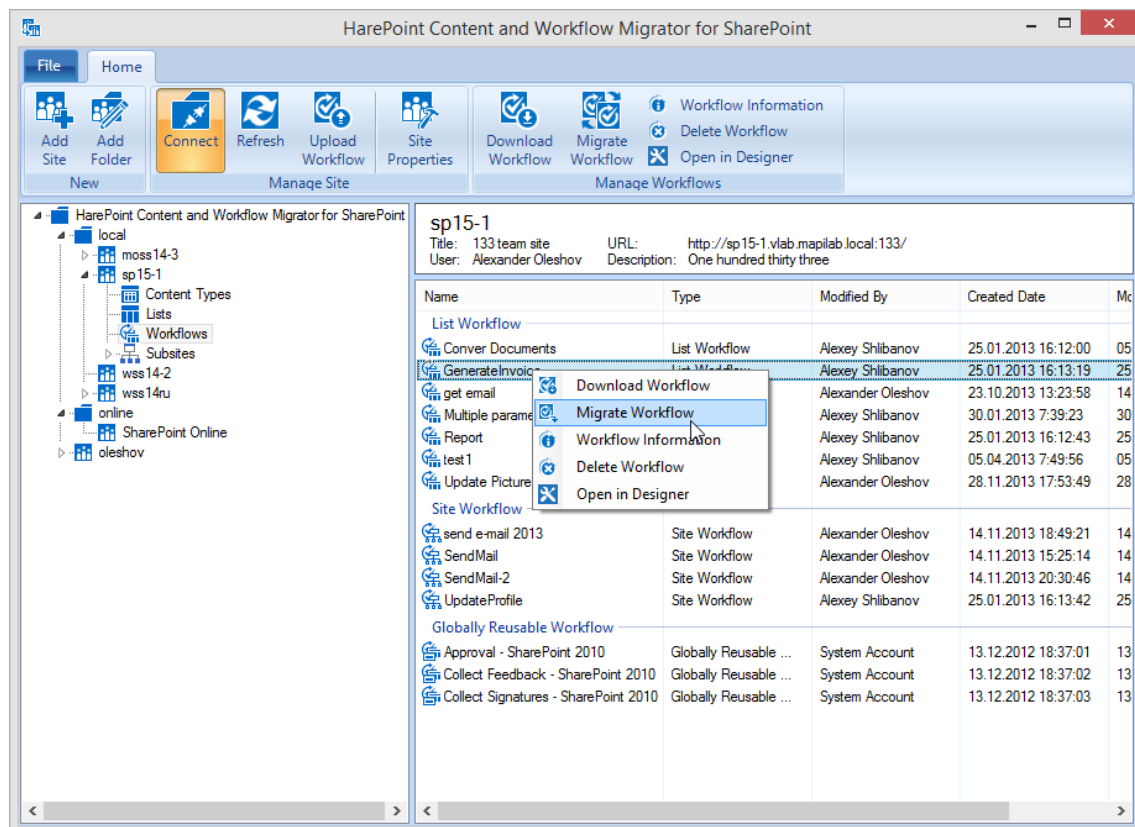
**Note:** when connecting to SharePoint Online site you can be requested to provide username and password.

**Important:** In order to be able to work with Migrator, user should have **Manage Lists** permission that is enabled for **Design** and **Full Control** permission levels:



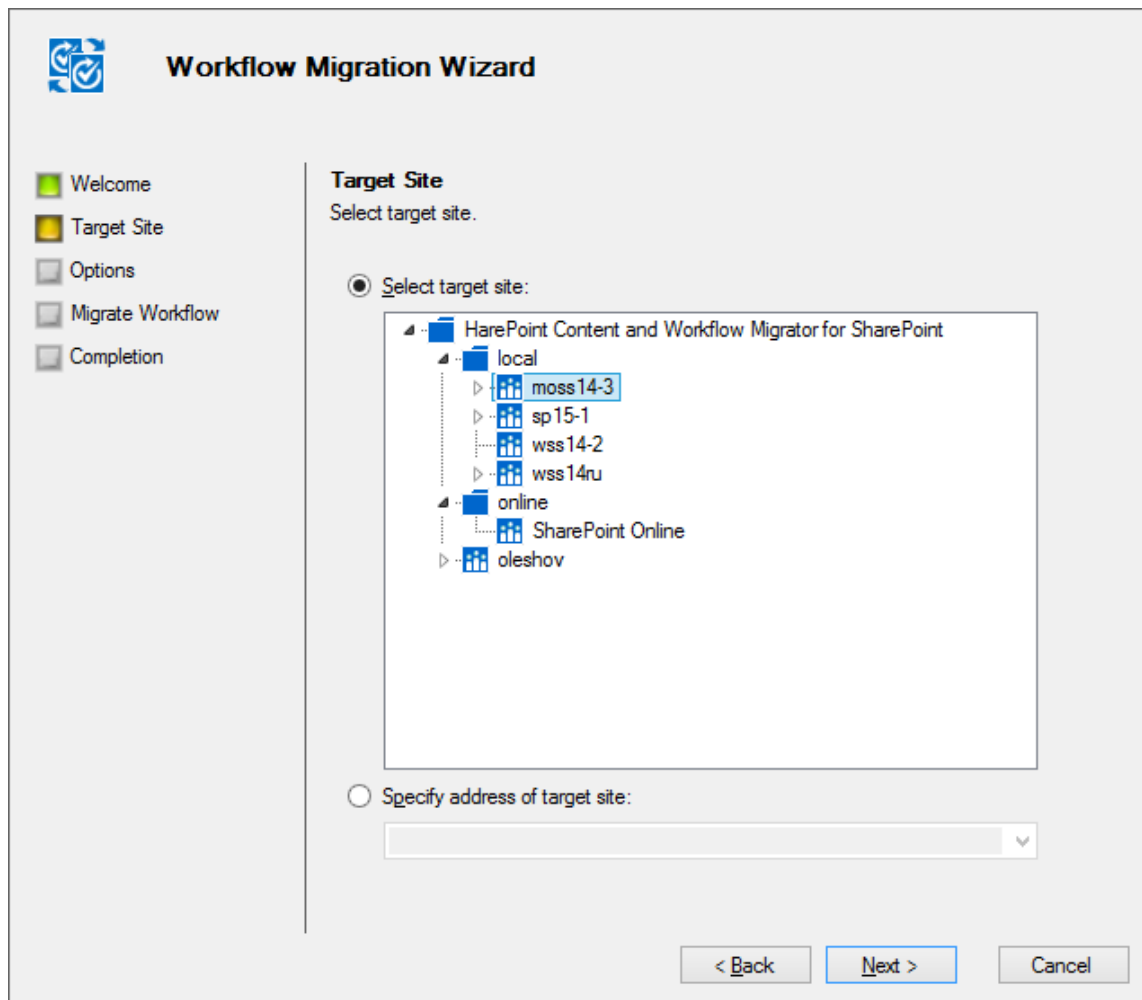
Once the site is added, you can connect to it by clicking **“Connect”** button on the ribbon. After the connection is established, a list of workflows, lists and content types on this site will be displayed in the right pane. The site hierarchy will appear in the tree view in the left pane.

For more convenient work with a large number of sites, you can **group sites into folders**. Folders can be created using **“Add Folder”** button on the ribbon.



## 2. Migrating a workflow, list or content type

To transfer a workflow, list or content type from one SharePoint site to another, simply drag and drop one or more of them to the target site. This will bring up the **Migration Wizard** that will guide you through the transfer process. Also you can start this wizard via the context menu or “**Migrate Workflow**”, “**Migrate List**” and “**Migrate Content Types**” button on the ribbon.



On the “**Target Site**” step of the wizard, you need to choose SharePoint site where data will be transferred. By default, this is the site where you drag the data. You can choose another site or specify a new one.

### Workflows

When transferring several workflows, on the “**Settings**” step, you may need to specify some settings for each workflow.

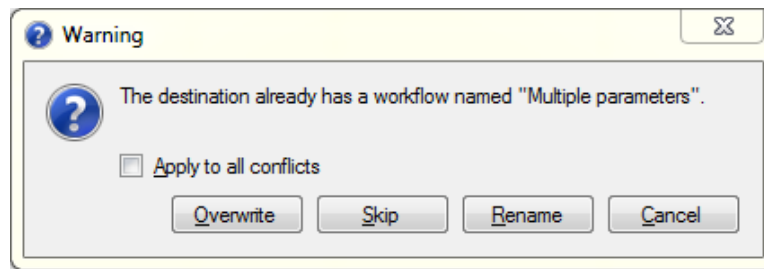


If case if any problems during the transfer of specific workflow occur, the “Message” column will contain the brief description of the problem. You can click on the message to get detailed report on the problem.

The most common errors when migrating workflows are:

- Source workflow contains of one or more of the activities that are not available on the target SharePoint site. In this case, if source SharePoint site uses some custom activities, then you need first to deploy them on the target SharePoint site.
- The program cannot map one or more lookup fields on the target SharePoint site. In this case the workflow will be migrated but not published. You need to open the transferred workflow on target SharePoint site in SharePoint Designer, correct the errors and publish the workflow.

If a workflow with the same name exists on the target SharePoint site, the following dialog will be displayed:



allowing you to Overwrite, Skip or Rename a workflow. If you choose to rename a workflow, the number will be appended to the name of a workflow.

On the last page of the Workflow Migration Wizard there is an option to view the log file with detailed information about workflow transfer process.

## Lists

When transferring lists you will have several options to select:

**List Migration Wizard**

Welcome  
Target Site  
**Options**  
Migrate List  
Completion

**Options**  
Select list migration options.

List title:

☒ Copy list items  
    ☒ Copy list item attachments  
☐ Copy associated content types  
☐ Copy associated list workflows  
☐ Copy associated reusable workflows

< Back    Next >    Cancel

*List title* – if necessary you can rename the list here

*Copy list items* - choose to copy list items or not. If you uncheck this, an empty list will be created on the target site with the same fields, content types and settings as the original one.

*Copy list item attachments* – by default items will be copied with their attachments. Uncheck to copy the items only.

*Copy associated content types* – check this if you need to copy the associated content types

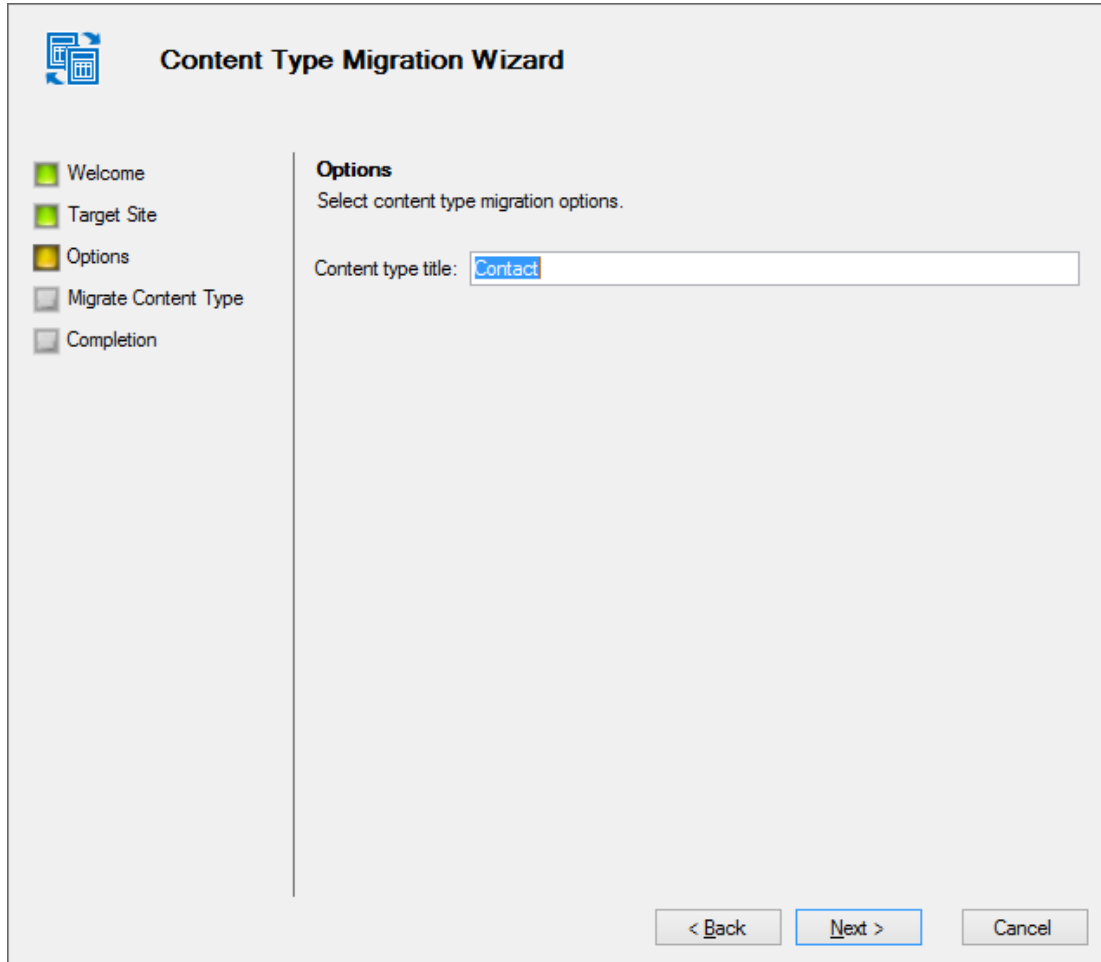
*Copy associated list workflows* – check this if you need to copy the associated list workflows

*Copy associated reusable workflows* – check this if you need to copy the associated reusable workflows

If the list with the same name already exists on the target site, you will be asked what action should be taken: to overwrite, to skip or to rename the list being processed.

## Content types

While transferring content types the only option available is to set content type title:



The image shows a 'Content Type Migration Wizard' dialog box. On the left, there is a vertical list of steps: 'Welcome', 'Target Site', 'Options', 'Migrate Content Type', and 'Completion'. The 'Options' step is currently selected and highlighted with a yellow background. The main area of the dialog is titled 'Options' and contains the instruction 'Select content type migration options.' Below this, there is a text input field labeled 'Content type title:' with the word 'Contact' entered. At the bottom right of the dialog, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a blue border.

If the content type with the same name already exists on the target site, you will be asked what action should be taken: to overwrite, to skip or to rename the content type being processed.

## 3. Additional features

### Import and Export

In case if you are unable to connect to source or destination SharePoint site for some reasons, you can use *export to file* and *import from file* features. When you click on the “**Download Workflow**”, “**Download**

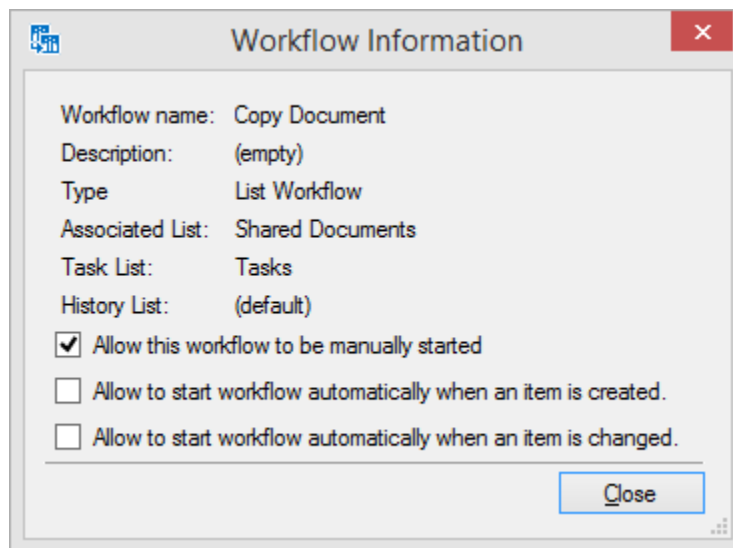
**List**” or **“Download Content Type”** button on the ribbon or right-click context menu the program will create a .zip file that can be imported on another SharePoint site using the **“Upload ...”** button.



## Information and settings

It is possible to view the information about the selected workflow, list or content type by clicking **“Information”** button on the ribbon or in the right-click context menu.

For the workflows, it is also possible to change startup settings:



Note that Site Workflows have only one setting “Allow this workflow to be manually started”.

## SharePoint Designer

You can open workflow, list or content type in SharePoint Designer simply by clicking **“Open in Designer”** button on the ribbon or right-click context menu.

## Deletion

Workflow, list or a content type can be deleted using **“Delete ...”** button on the ribbon or right-click context menu.



Note that elements are deleted permanently and cannot be restored! It is always recommended to make a backup before deletion.

## Appendix A. Troubleshooting

### A.1 Where is the log file located?

When you experience a problem with HarePoint Content and Workflow Migrator and plan to contact HarePoint technical support (<http://www.harepoint.com/Support>), be sure to attach the log files to your request.

Log files are located at:

`%ALLUSERSPROFILE% \HarePoint\HarePoint Content Migrator\`

(e.g. C:\ProgramData\HarePoint\HarePoint Content Migrator\workflow.log).