



HarePoint Workflow Migration

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



Product version 1.1

February 16, 2013

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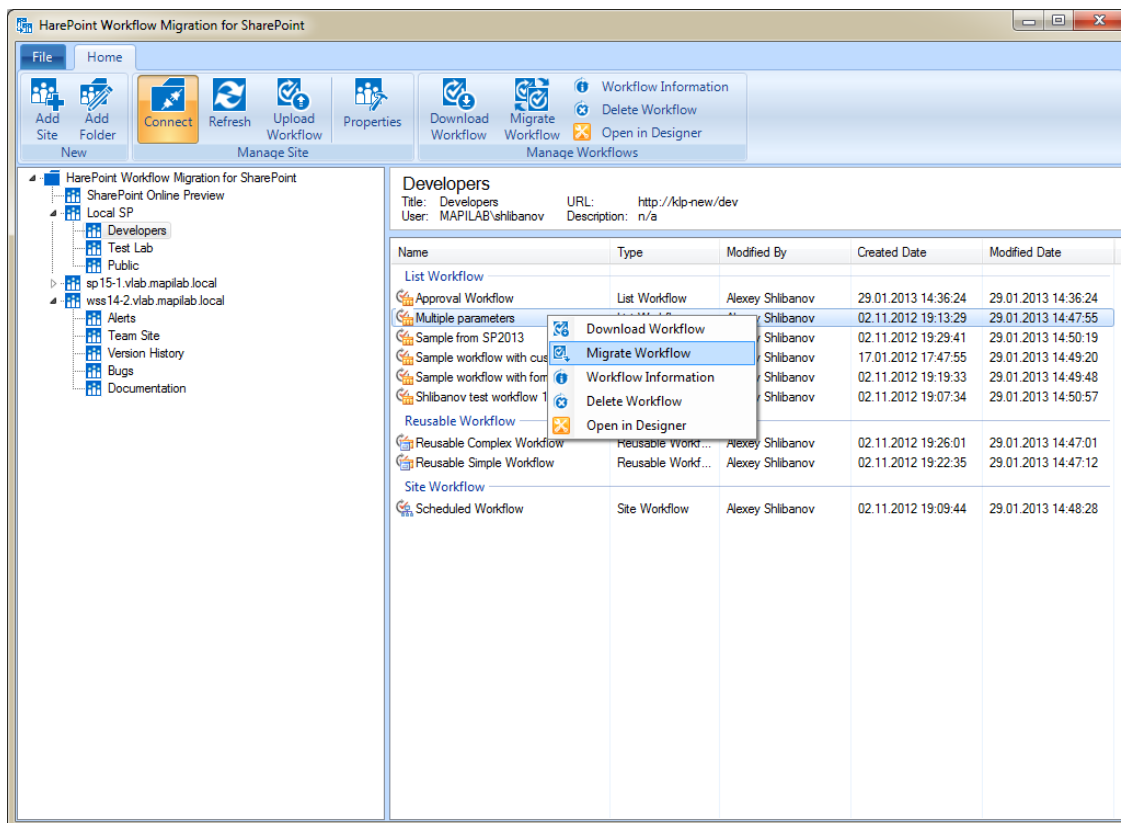
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I. Introduction

Workflows are one of the most important components of any SharePoint environment today. They let you create the backdrop that you need for team collaboration, project management, and business process improvement. However, there is a problem that arises: migration of workflows from one environment to another. Perhaps most common example is the transfer of workflows from a SharePoint test environment (where a workflow is created and tested) to the production environment (where the workflow will be utilized).

HarePoint Workflow Migration for SharePoint allows you to easily transfer workflows 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.

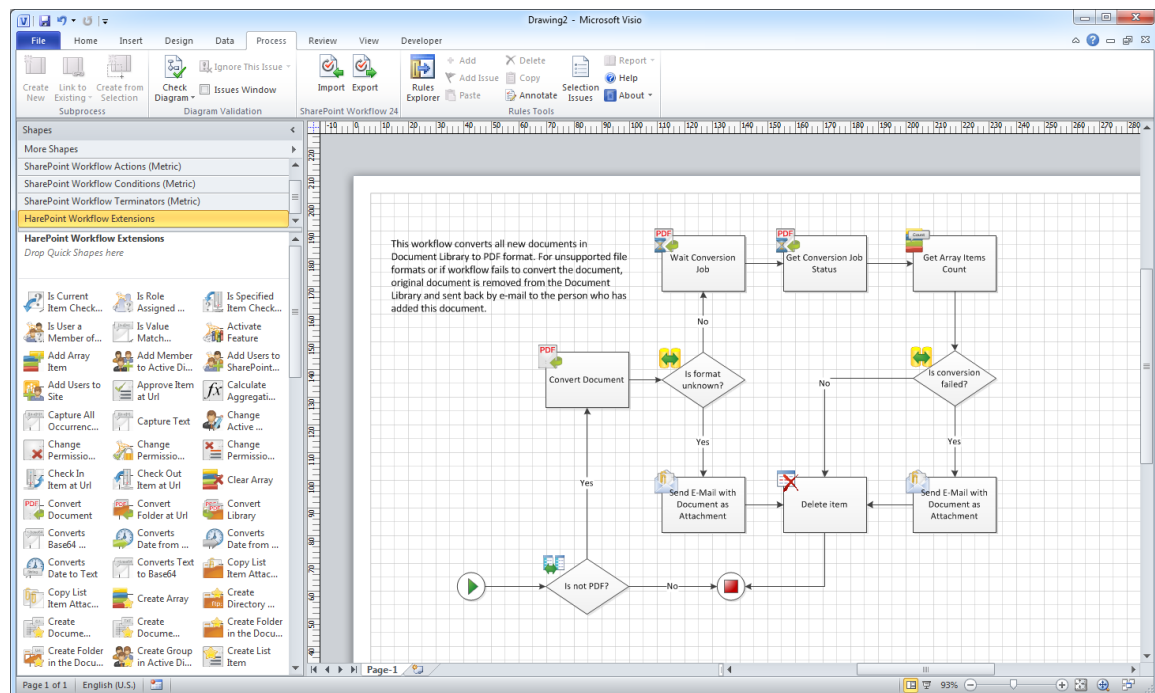
We also recommend you to pay attention to the following products of our company:

- **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.

The product supports declarative workflows (created in Microsoft SharePoint Designer) and Visual Studio workflows. It supports both site and list workflows and allows launching workflow for every document or list item, for manually selected item or for items selected by CAML query. HarePoint Workflow Scheduler is fully compatible with InfoPath, and has the option to pass pre-defined parameters.

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				

- HarePoint Workflow Extensions for SharePoint 2010** provides over 180 new 'ready-to-use' activities for SharePoint workflow development. The product is fully supported by all Microsoft workflow development tools and there is no need to migrate and adapt current workflows to a new development environment, or to master and deploy new development tools. You can benefit from the power of the product in SharePoint Designer 2010, Microsoft Visual Studio 2010, and in Microsoft Visio 2010.



You will find the information on these products, as well as trial versions at www.harepoint.com.

II. Deployment

1. System requirements

HarePoint Workflow Migration 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 Migration 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 Workflow Migration 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 Workflow Migration 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:

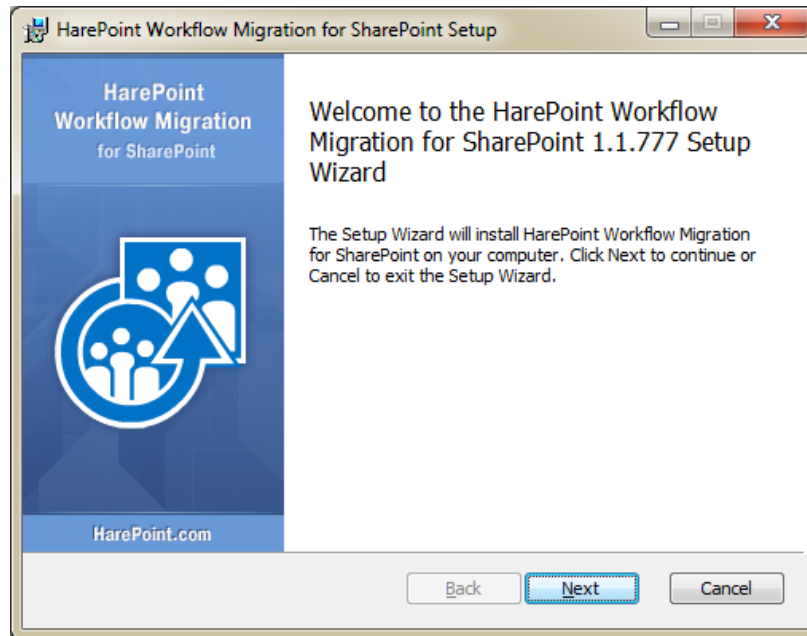
1. **Trial License.** Provided automatically for a 30-day period to use the Product in organization's environment with a limitation on the maximum number of actions in the workflow that can be migrated.
2. **Commercial License.** This license is purchased for a number of seats and allows using the Product in the organization's environment without limitation by usage time and functionality.

Note that after purchasing of Commercial License and entering registration key product becomes fully functional.

See product page at <http://www.harepoint.com/> for more details about Product licensing.

4. Installing HarePoint Workflow Migration for SharePoint

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



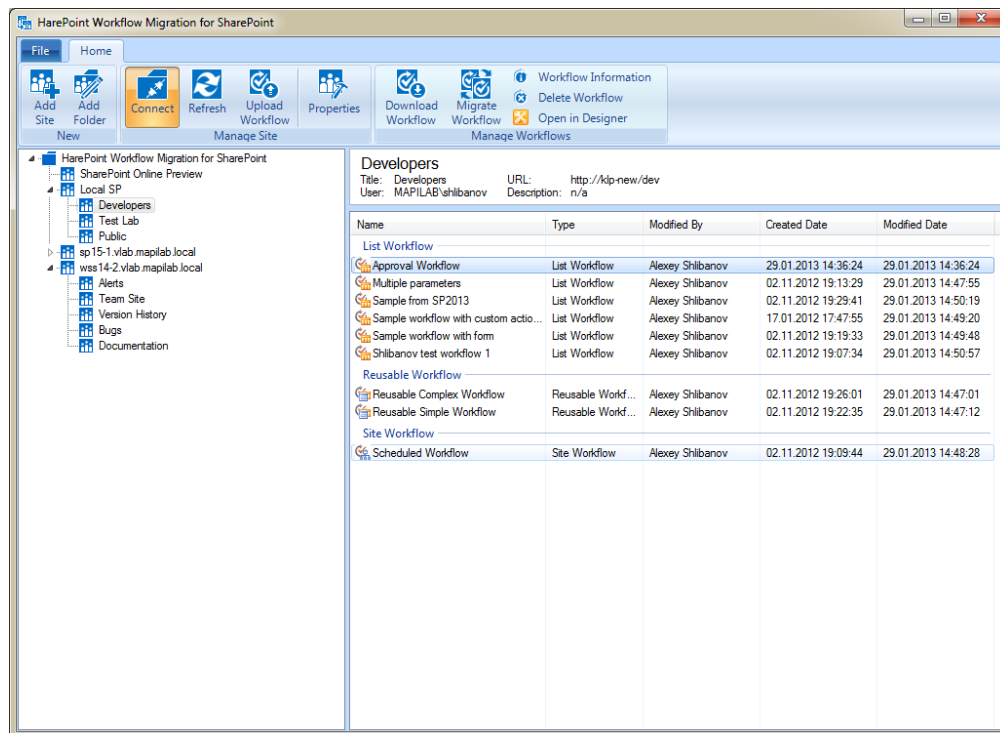
You can install the product on any computer in your organization which has access to the target SharePoint sites.

After installation the Product is ready to work. See the Section III of this manual for the Product overview.

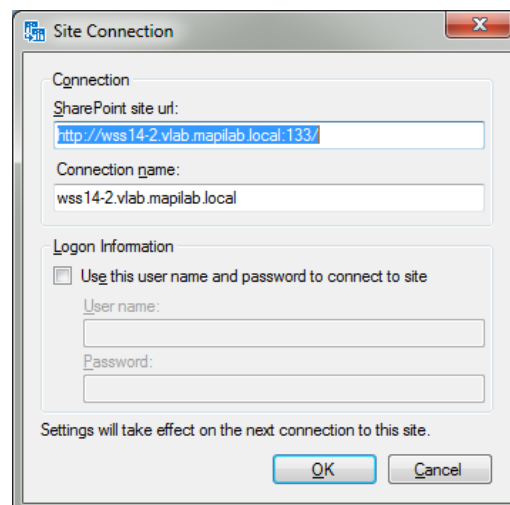
III. Product Overview

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:



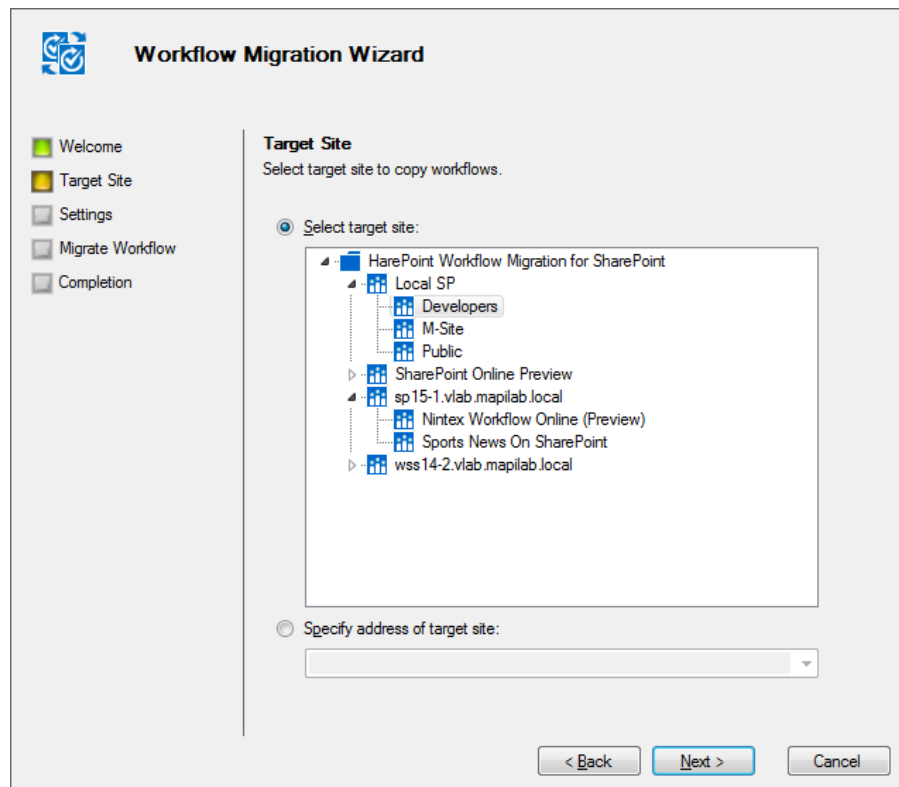
By default, the program connects to the SharePoint site using the current user account. If you need to connect using a different user account, you can specify it in the “Logon Information” section. Note: when connecting to SharePoint Online site the program can ask you to provide username and password manually.

Once the site is added, you can connect to it by clicking “Connect” button on the ribbon. After the program connects to site, it will display a list of workflows on this site in the right pane. It also downloads the site hierarchy, and it will appear in the tree in the left pane.

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

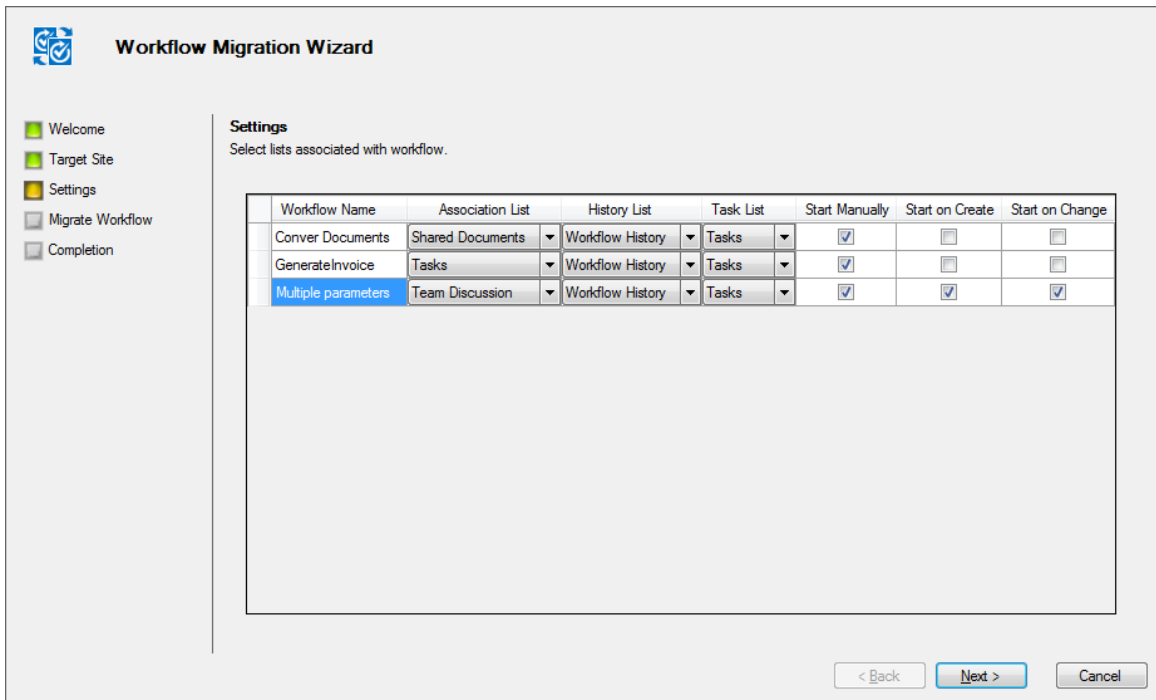
2. Migrating workflow

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



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

On the “Settings” step you may need to specify some settings for each workflow you want to transfer.



Workflow Migration Wizard

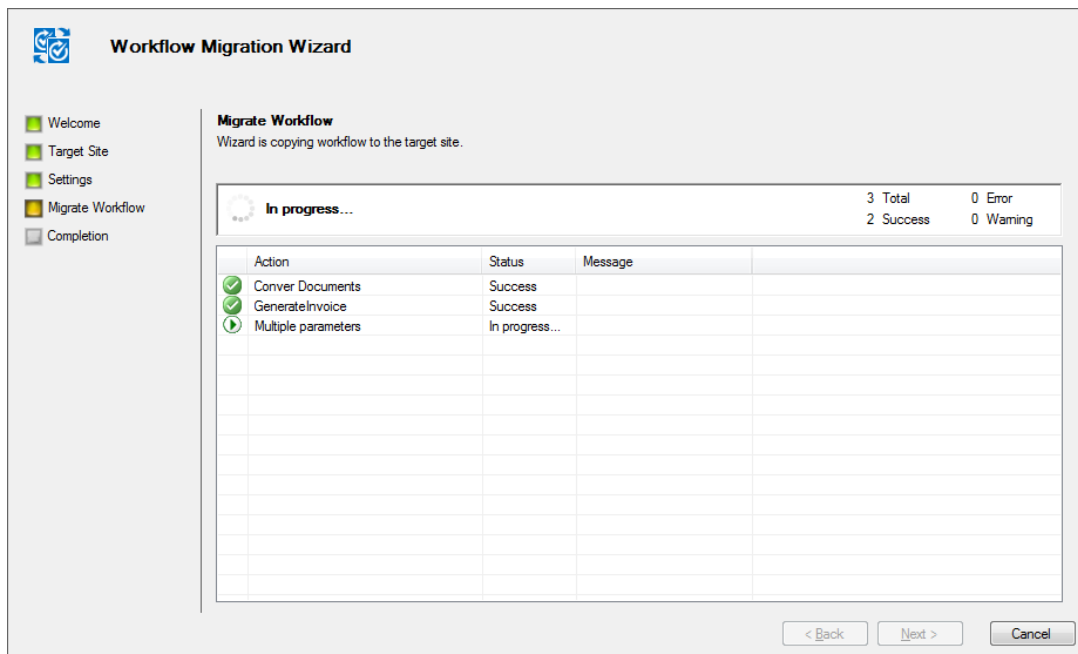
Settings
Select lists associated with workflow.

Workflow Name	Association List	History List	Task List	Start Manually	Start on Create	Start on Change
Conver Documents	Shared Documents	Workflow History	Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GenerateInvoice	Tasks	Workflow History	Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multiple parameters	Team Discussion	Workflow History	Tasks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

< Back Next > Cancel

These settings include *Associated List* (for List workflows), *History List*, *Task List* and *workflow start options*. The program tries to match lists on the source and target SharePoint sites automatically. But this is not always possible and in some cases you want to specify the lists manually.

After you click “Next” button the workflow migration process will start.



Workflow Migration Wizard

Migrate Workflow
Wizard is copying workflow to the target site.

In progress...

Action	Status	Message
Conver Documents	Success	
GenerateInvoice	Success	
Multiple parameters	In progress...	

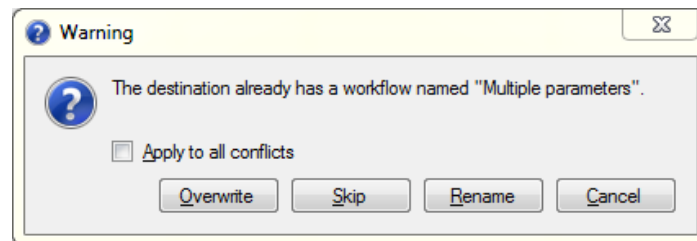
3 Total 0 Error
2 Success 0 Warning

< Back Next > Cancel

If there are any problems during the transfer of specific workflow, then the “Message” column will contain the brief description of the problem. You can click on the specific message to get detailed report on the problem. The most common errors 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 transferred workflow on target SharePoint site in SharePoint Designer, correct errors and publish workflow.

If a workflow with the same name exists on the target SharePoint site, then the program will display the following dialog:



And let you choose whether to Overwrite, Skip or Rename a workflow. If you choose to rename a workflow, then the number will be added to the name of a workflow.

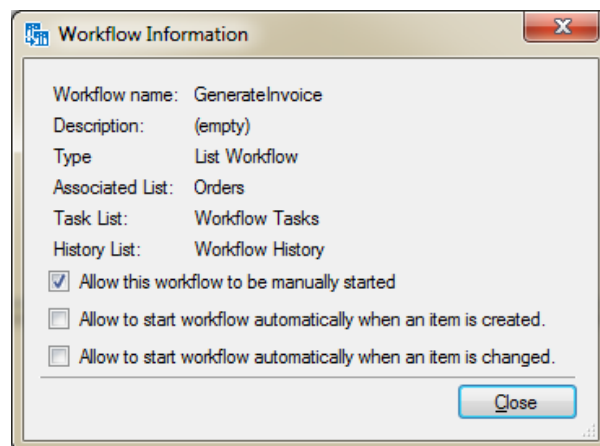
On the last page of the Workflow Migration Wizard there is an option to view the log file with detailed information about workflow transfer process.

3. Additional features

If for any reason you are not able to connect to both the source and destination SharePoint sites, then you can use feature to export a workflow to a file. When you click on the “Download Workflow” button on the ribbon (or context menu) the program will create a .zip file that can be imported on another SharePoint site using “Upload Workflow” button.



Additionally, you can change workflow startup settings by clicking “Workflow Information” button on the ribbon:



Finally, you can delete a workflow, as well as open them in the SharePoint Designer.

Appendix A. Troubleshooting

A.1 Where is the log file located?

When you experience a problem with HarePoint Workflow Migration and plan to contact technical support, be sure to attach the log files to your request. Log files are located at %ALLUSERSPROFILE%\MAPILab Ltd\HarePoint Workflow Migration for SharePoint\ folder (e.g. C:\ProgramData\MAPILab Ltd\HarePoint Workflow Migration for SharePoint \ workflow.log).