HarePoint Content and Workflow Migrator

For SharePoint Foundation/Server 2010, 2013, 2016 and SharePoint Online.

Product version 2.2

Aug 18, 2016

Table of Contents

Table of Contents 2

I. Introduction. 3

II. Deployment. 5

1. System requirements. 5

2. Supported versions of Microsoft SharePoint. 6

3. Licensing and trial limitations. 6

4. Installing HarePoint Content and Workflow Migrator for SharePoint. 7

III. Product Overview. 8

1. Site Connection. 8

2. Migration objects. 10

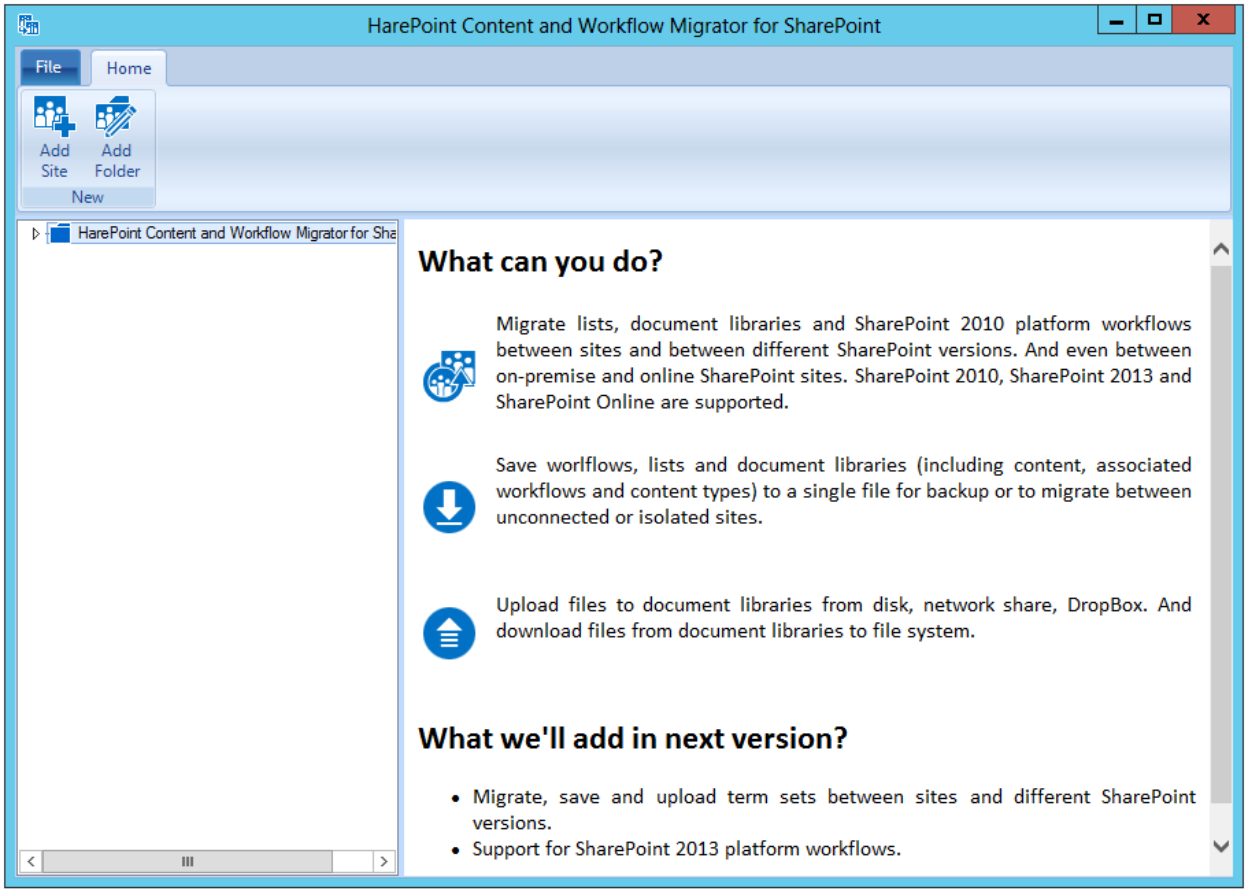
3. Additional features 16

Troubleshooting. 19

I. Introduction.

SharePoint environment has a lot of content inside, like workflows, documents, terms etc. One of the most common problem for SharePoint administrator is how to migrate these objects from one environment to another (usually from Development to Production environment, but not only).

HarePoint Content and Workflow Migrator for SharePoint allows you to transfer content you have between SharePoint sites.

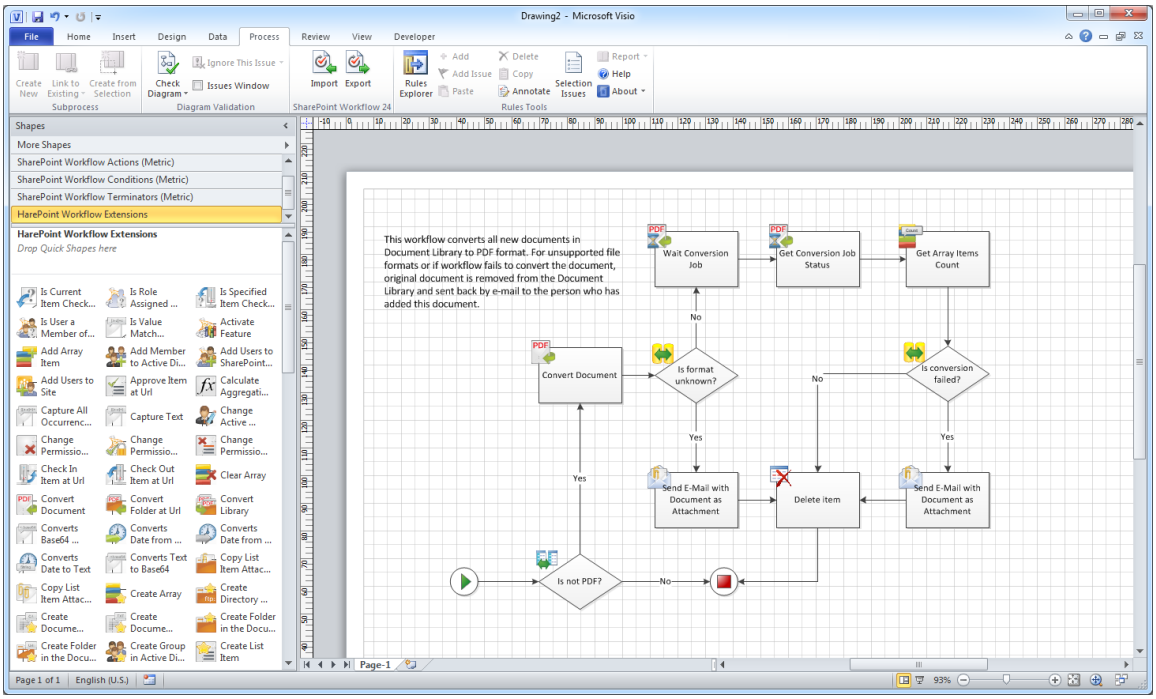


The product supports Office 365 and allows you to migrate content to/from SharePoint Online. The product currently works only with SharePoint 2010 workflow platform type. The support of native SharePoint 2013 workflows will be added in near future.

We also recommend that you to pay attention to the following product:

HarePoint Workflow Extensions for SharePoint 2010/2013/2016 provides over 220 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 2010/2013, Microsoft Visual Studio 2010/2013, and in Microsoft Visio 2010/2013.



II. Deployment.

1. System requirements.

HarePoint Content and Workflow Migrator for SharePoint is a desktop application. It can be run on following versions of Microsoft Windows (32-bit or 64-bit):

- Windows Server 2003/2008/2012;
- Windows XP;
- Windows Vista;
- Windows 7;
- Windows 8.

The product is also compatible with following operating systems:

- Windows Small Business Server 2003/2008/2011;
- Windows Essential Business Server 2008;

Microsoft .NET Framework v3.5 or higher is required before performing HarePoint Workflow and Migrator for SharePoint installation. Microsoft .NET Framework v3.5 or higher is a component of Microsoft Windows Server 2008(R2), Windows Server 2012, Windows Vista, Windows 7 and Windows 8. For 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 2010/2013/2016,
- Microsoft SharePoint Foundation 2010/2013,
- Microsoft SharePoint Online (**only SharePoint 2010 Workflow platform type is supported**).

3. Licensing and trial limitations.

HarePoint Content and Workflow Migrator for SharePoint is licensed by the number of seats.

Seat - a user who has access to the product inside the company's environment.

You may use the product with one of two licenses:

1. **Trial License**.

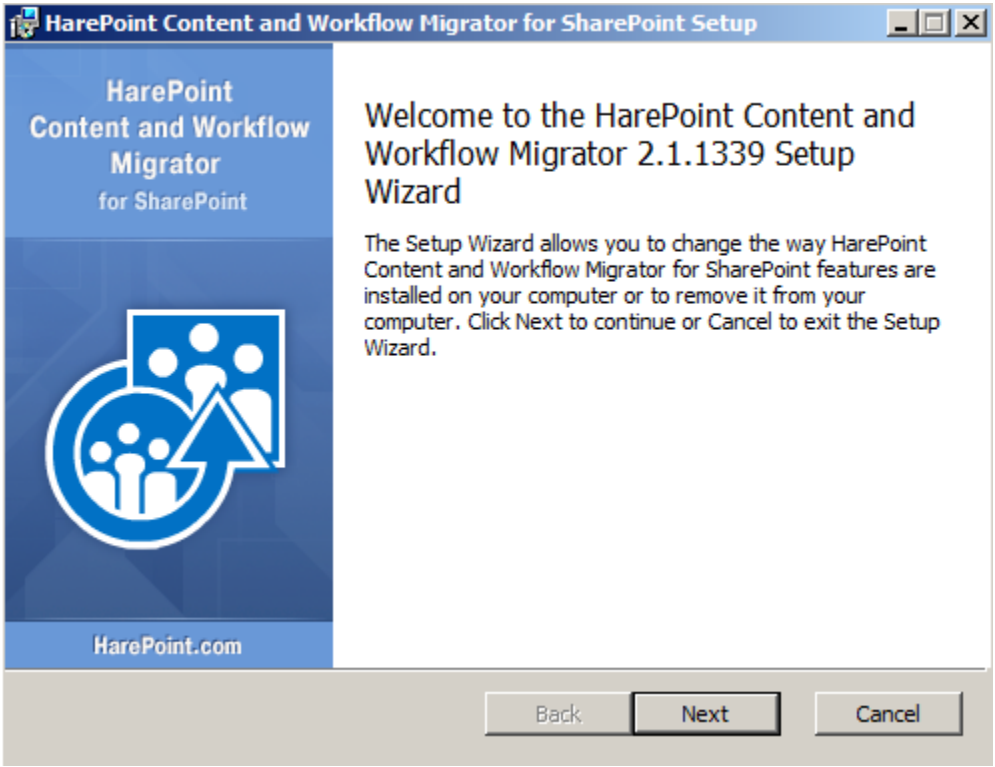
   A 30-day trial period, available for download. This trial version does not have any functional limitations concerning content and workflows that can be migrated in SharePoint, <u>but it should not be used in SharePoint Production environments, because such usage violates the trial license agreement</u>.

2. **Commercial License**.

   This license is purchased for a number of seats and allows use of the product in all environments of organization.

4. Installing HarePoint Content and Workflow Migrator for SharePoint.

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



After installation was finished, the product is ready to work.

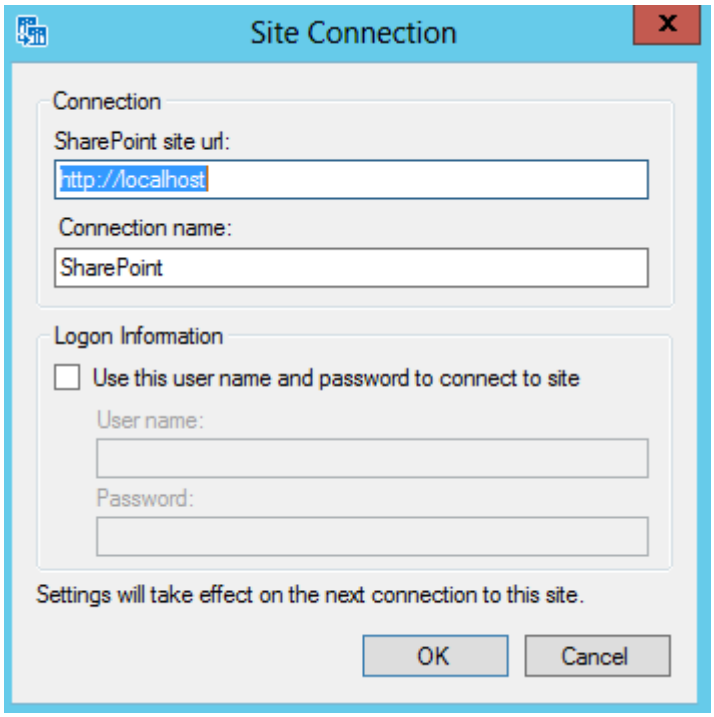
Note: <u>You may install the product on any computer in your organization which has access to the target SharePoint sites.</u>

III. Product Overview.

1. Site Connection.

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

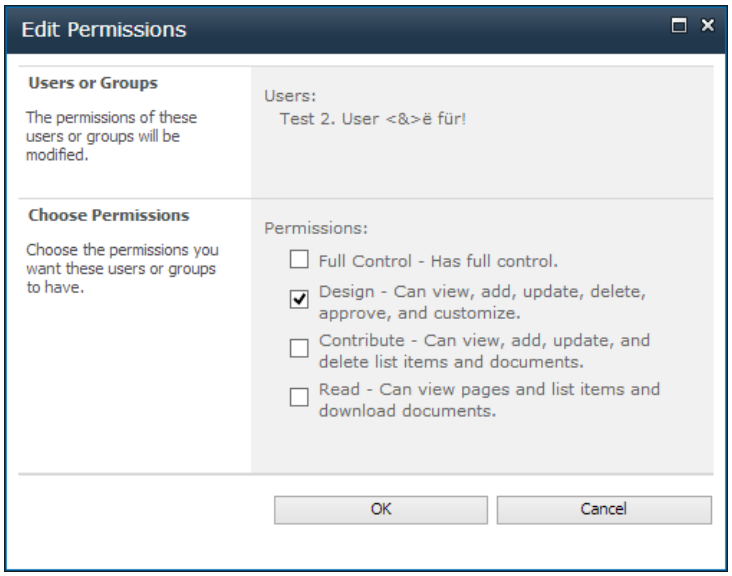
To add a new SharePoint site connection, click the "**Add Site**" button on the ribbon and enter the site connection details:



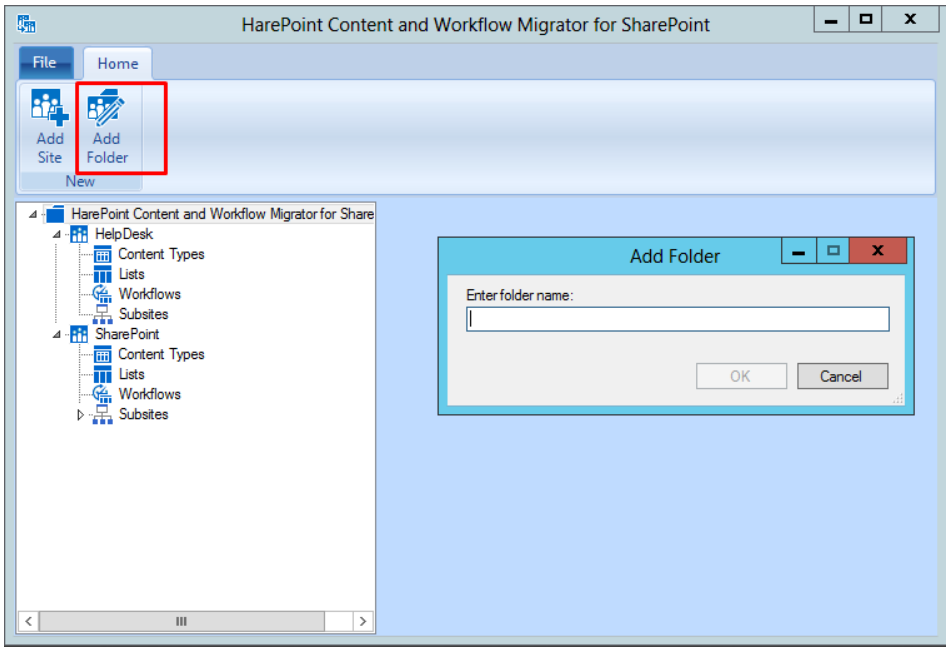
By default, the program connects to the SharePoint site using the current user account. If you need to connect using a different user account, you can specify this in the "**Logon Information**" section.

Note: <u>When you connect with a SharePoint Online site, you must provide a username and password</u>.

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

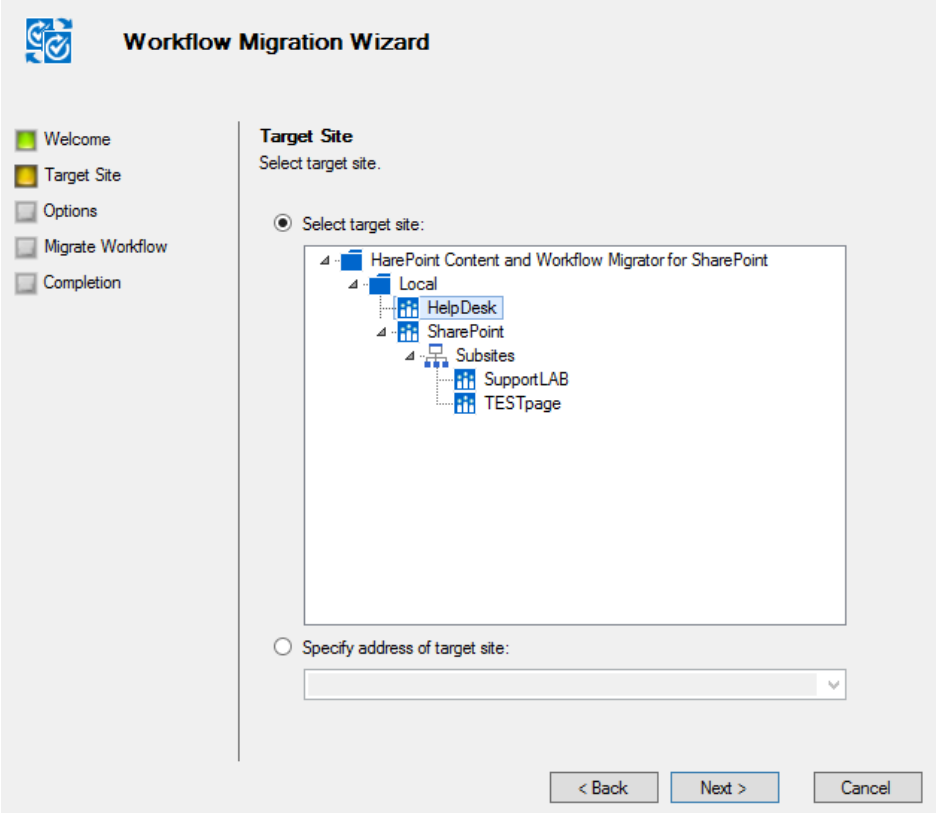


Once the site is added, you can connect to it by clicking the "**Connect**" button on the ribbon. After the connection is established, a list of workflows, lists and content types on this site will be displayed in the right pane. The site hierarchy will appear in the tree view in the left pane. For more convenient work with a large number of sites, you can **group sites into folders**. Folders can be created using the "**Add Folder**" button on the ribbon.



2. Migration objects.

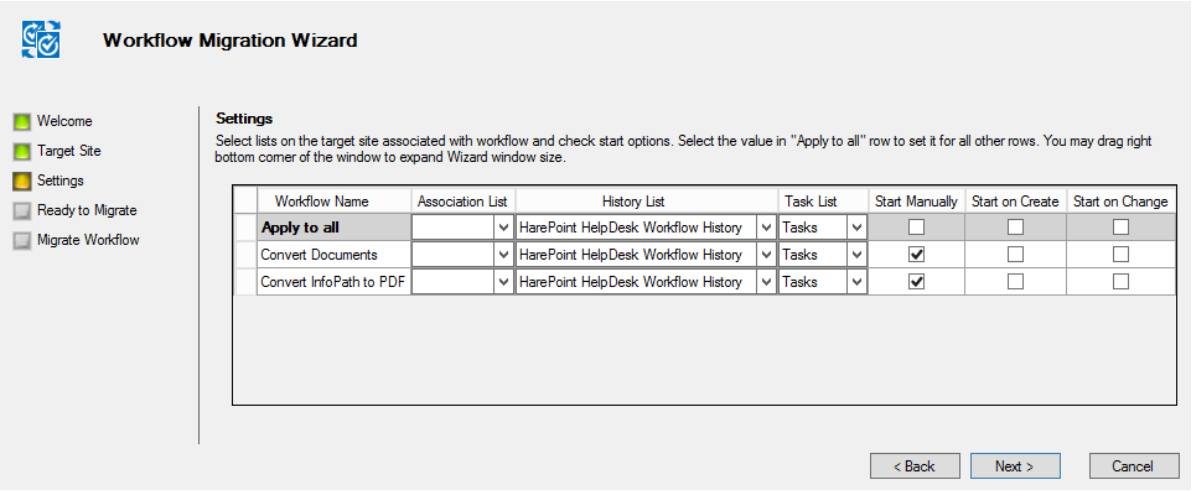
To transfer the content you have from one SharePoint site to another, simply drag and drop one or more of them to target site. This will bring up the migration wizard that will guide you through the transfer process. Also you can start this wizard via the context menu or "**Migrate**" buttons on ribbon.



On "**Target Site**" step of the wizard, you need to choose the SharePoint site where the 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

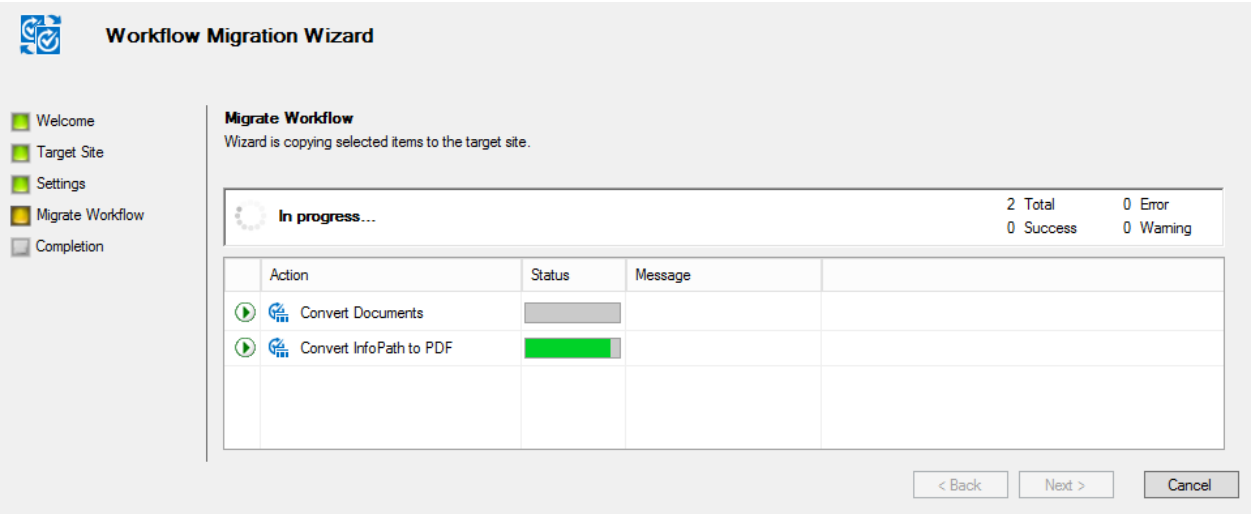
During the transfer of several workflows, in the "**Settings**" step, you may need to specify some settings for each workflow.



These settings include *Association List* (for List workflows), *History List*, *Task List* and *Workflow start options (manually/on create/on change)*. Additionaly "**Apply to all**" action is available, if you want to apply the same settings for all workflows in the list.

By default, the program checks the lists on source and target SharePoint sites automatically. However, this is not always possible and in some cases you should specify the lists manually.

After you click "**Next**", the wizard will show a window with predefined settings you have made, then you may click a "**Migrate**" button to start the migration:



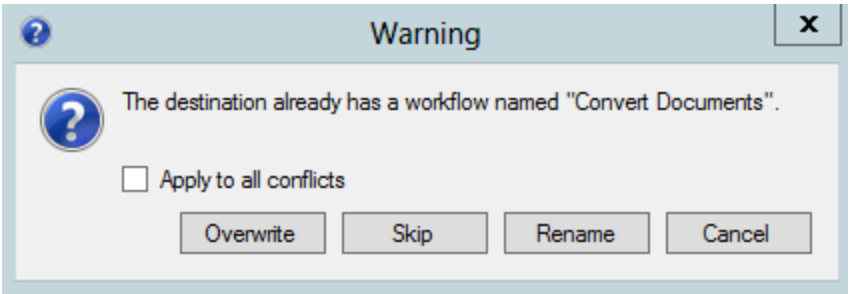
In the case, when a problem occurs during the transfer of a specific workflow, the "**Message**" column will contain the description of the problem. You can click on the message to get a detailed report of the problem.

The most common errors during migration of workflows are:

- Source workflow consist of one or more activities, which are not available on the target SharePoint site. In this case, if the 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 will need to open the transferred workflow on the 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:

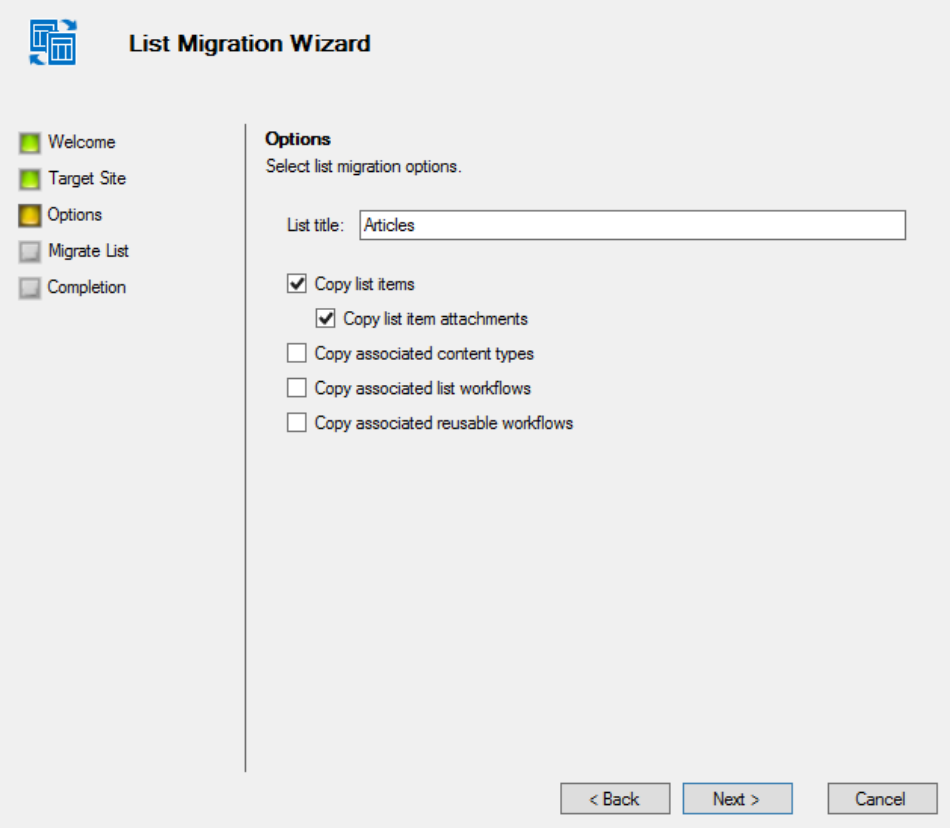


This allows you to overwrite, skip or rename the workflow. If you choose to rename the workflow, the number will be appended to the name of a workflow:

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

In the lists "**Lists Migration Wizard**" you have several options:

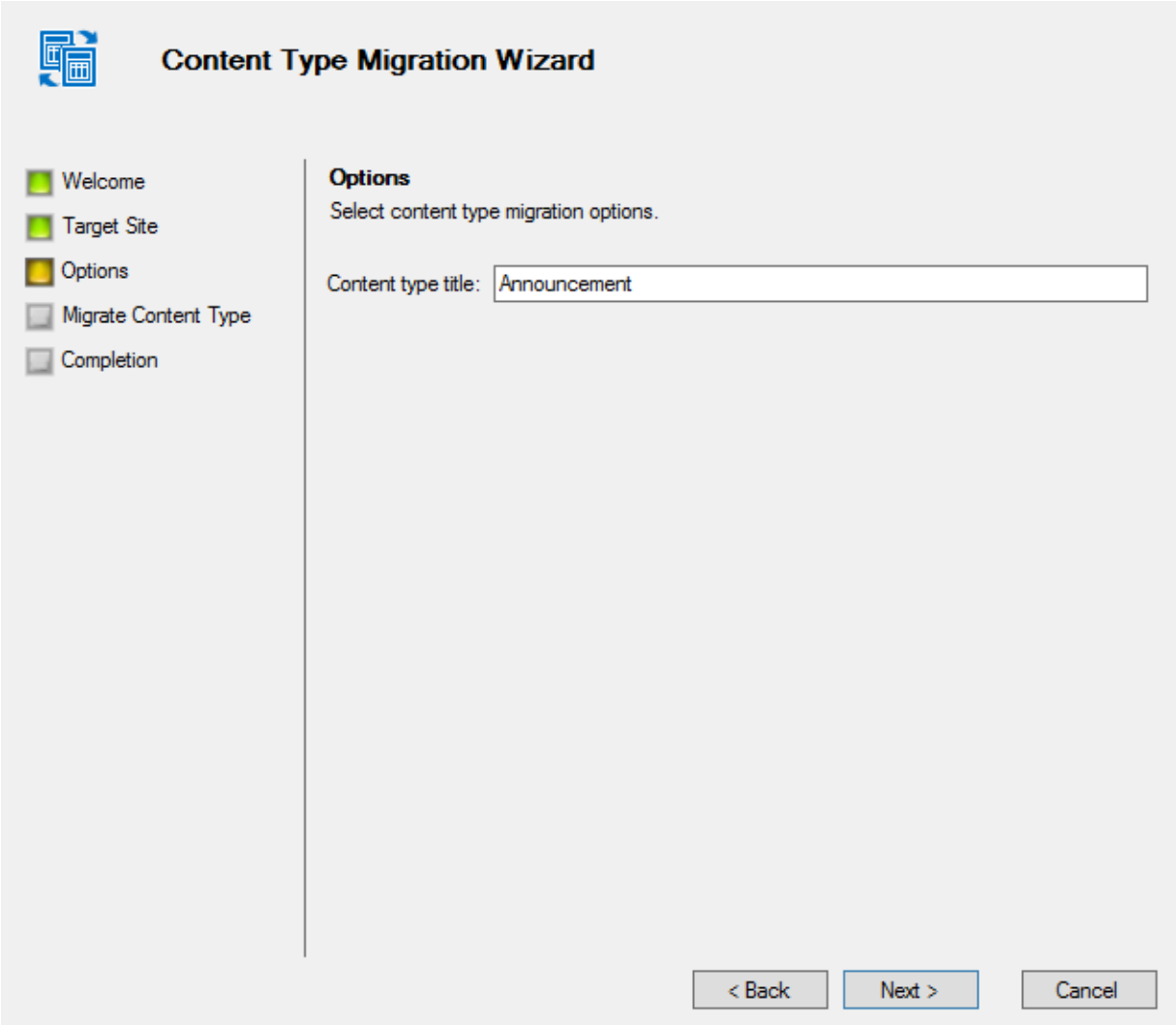


- *List title* **–** you may rename the list.
- *Copy list items* **-** to copy list items or not. If you uncheck this, an empty list will be created on the target site with the same fields, content types and settings as the original one.
- *Copy list item attachments* – by default, items will be copied with their attachments. Uncheck to copy the items only.
- *Copy associated content types* – to copy the associated content types.
- *Copy associated list workflows* – to copy the associated list workflows.
- *Copy associated reusable workflows* **–** to copy the associated reusable workflows

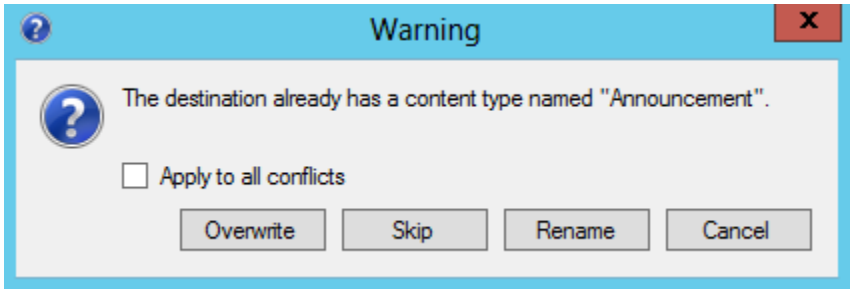
If a list with the same name already exists on the target site, you will be asked to overwrite, to skip or to rename a processed list.

Content types

In the "**Content Type Migration Wizard**" there is one option - to set a content type title:



If a content type with the same name already exists on the target site, you will be asked to overwrite, to skip or to rename the processed content type.

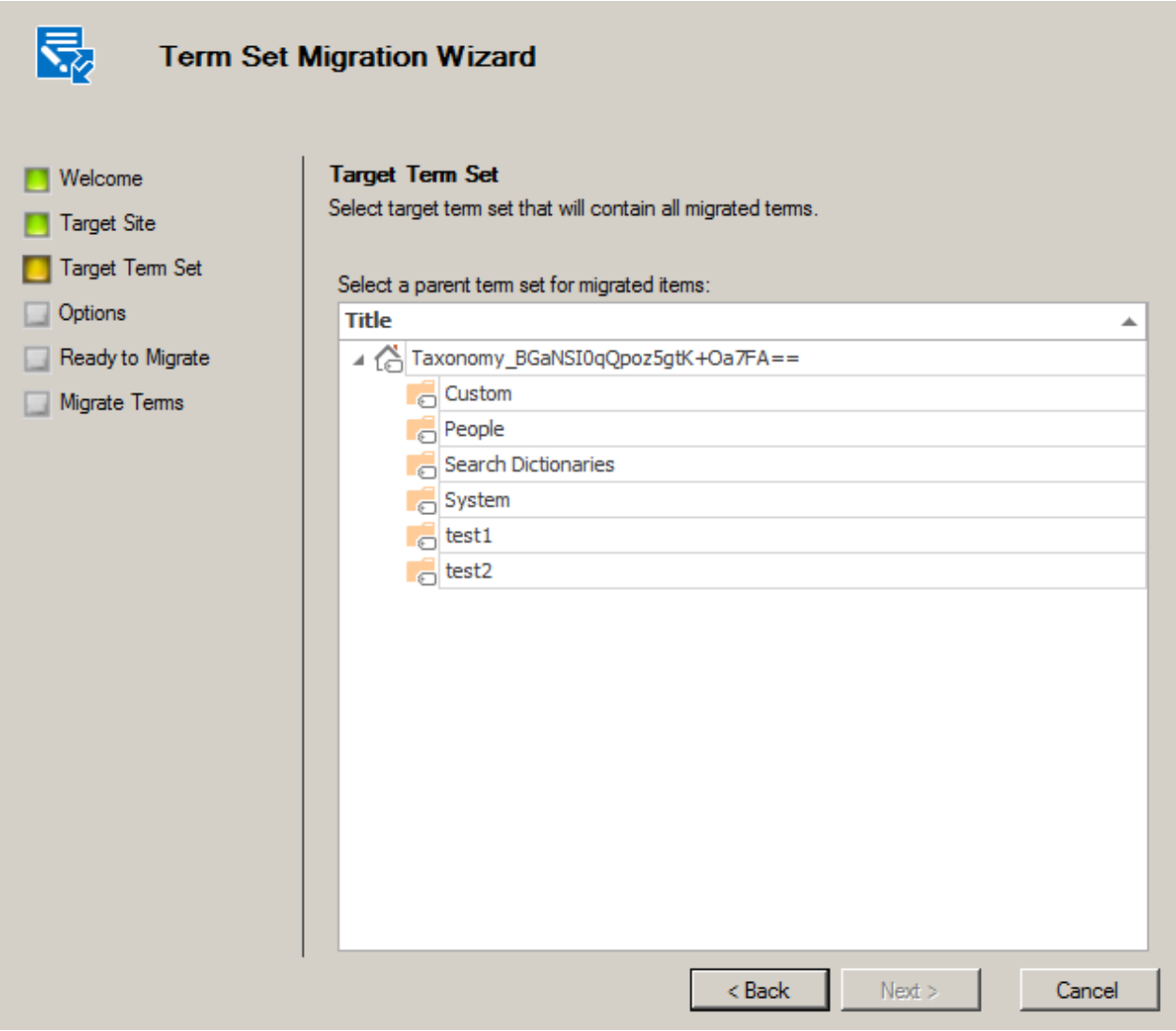


Terms

"Term Set Migration Wizard" will help you to migrate the SharePoint terms.

Just open a migration wizard and select the target site, to migrate the term sets you have.

Because of treeview structure, there are different nesting levels of terms. So if you try to migrate some term inside the parent source, you should select the parent target:

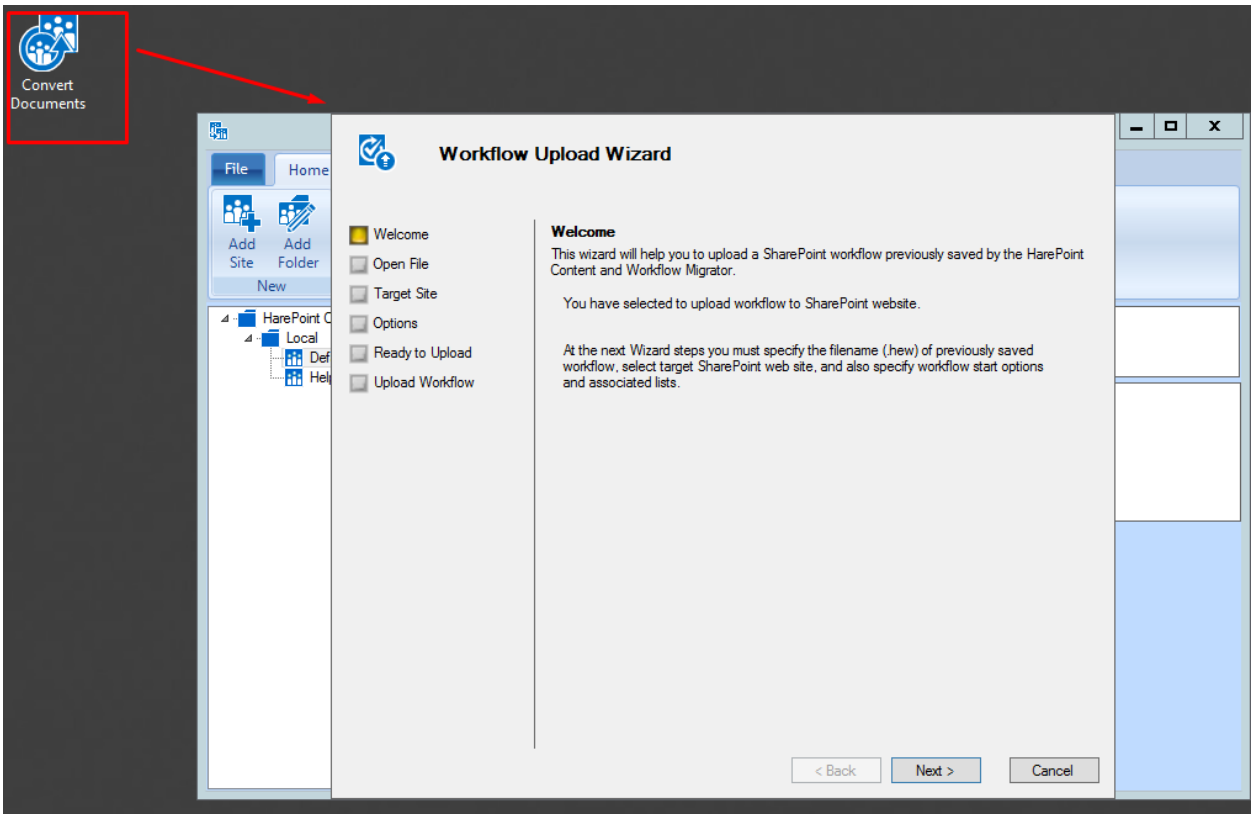


3. Additional features

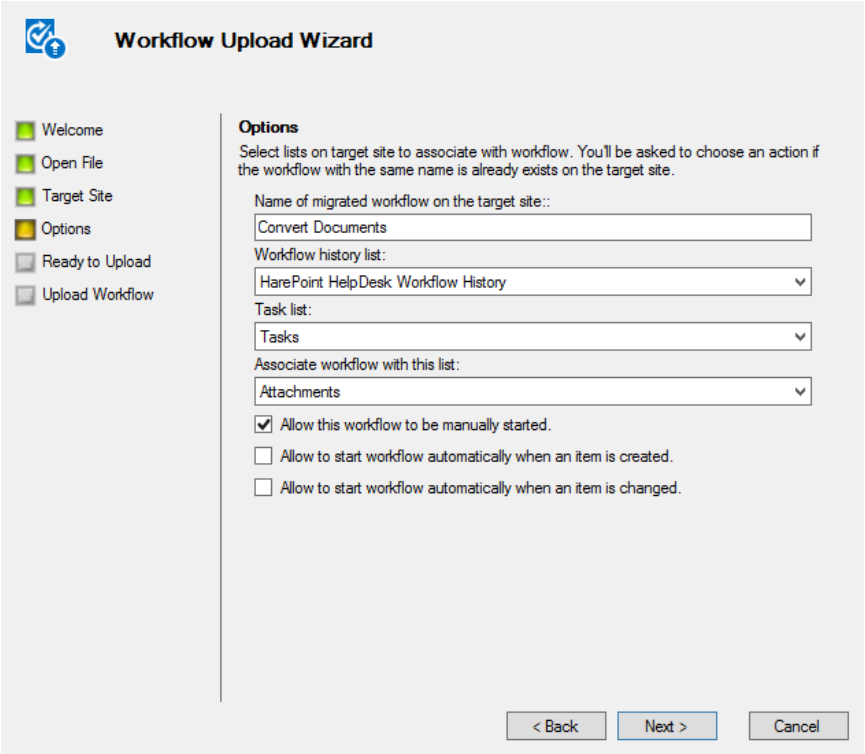
Import and Export

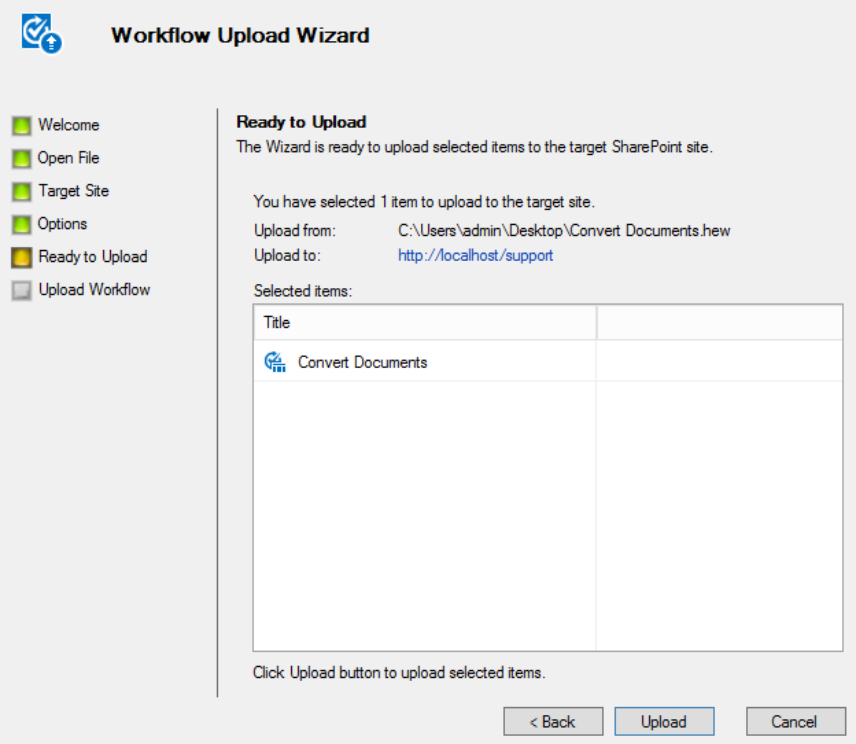
To import/export the content in SharePoint site you may use the "Save/*Upload"* option. When you click on "**Save**" button, the program will create a special file.

This file is a self-executed package. If you try to open it from some system folder, the "**Upload Wizard**" window will appear:



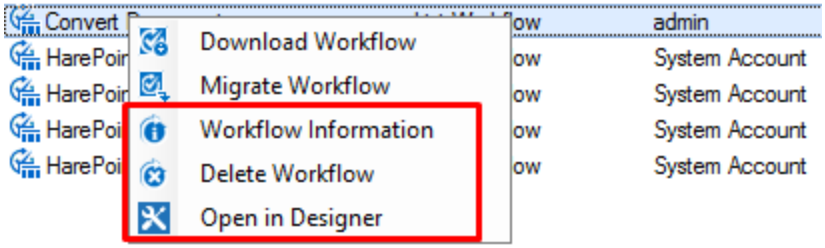
Additionaly this file, with Workflow/List/Content type/Terms inside, can be imported to another SharePoint site using the "**Upload**" button. The "**Upload Wizard**" window appears in this case too:





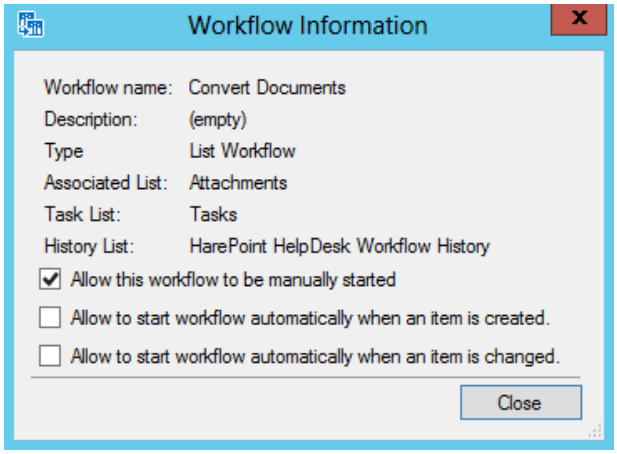
Additional context menu options.

For example for Worklflows.



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

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



Note: Site Workflows have only one setting: "Allow this workflow to be manually started".

- You can open the migration objects in SharePoint Designer simply with click on "**Open in Designer**" button on the ribbon, or right-click context menu.

- A workflow, list or a content type can be removed using the "**Delete**" button on ribbon or right-click context menu.

Note: Elements are deleted permanently and cannot be restored! It is always recommended to make a backup before erasing.

The similar options are available for the rest of migration objects in product.

Troubleshooting.

When you face a problem with "**HarePoint Content and Workflow Migrator**" and plan to contact a HarePoint technical support (http://www.harepoint.com/support), please, attach the log file to your request.

Log file is located at:

%ALLUSERSPROFILE% \HarePoint\HarePoint Content Migrator

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

The "**HarePoint Content and Workflow Migrator**" also has a "**debug mode"**. It will be better if you send a debug ("**trace.log**") file to us, too:

You should create a "WorkflowMigrator.exe**.config**" file in "<system drive>:\Program Files (x86)\HarePoint\HarePoint Content Migrator" with these strings inside:

```
<?xml version="1.0"?>
<configuration>
    <configSections>
    </configSections>
    <system.diagnostics>
        <trace autoflush="true">
            <listeners>
                <add type="System.Diagnostics.TextWriterTraceListener" name="TextWriter"
                        initializeData="c:\windows\temp\trace.log" />
            </listeners>
        </trace>
    </system.diagnostics>
  <startup>
   <supportedRuntime version="v4.0" sku=".NETFramework,Version=v4.0"/>
  </startup>
    </configuration>
```

Then run the program, replicate the issue and send us a "**trace.log**" file from "**c:\windows\temp**" (it is an example, so you may specify the drive letter and the folder name you want).