



HarePoint Content and Workflow Migrator

For SharePoint Foundation/Server 2010, 2013, 2016, 2019, SE and SharePoint Online.



Product version 3.6

November 25, 2022

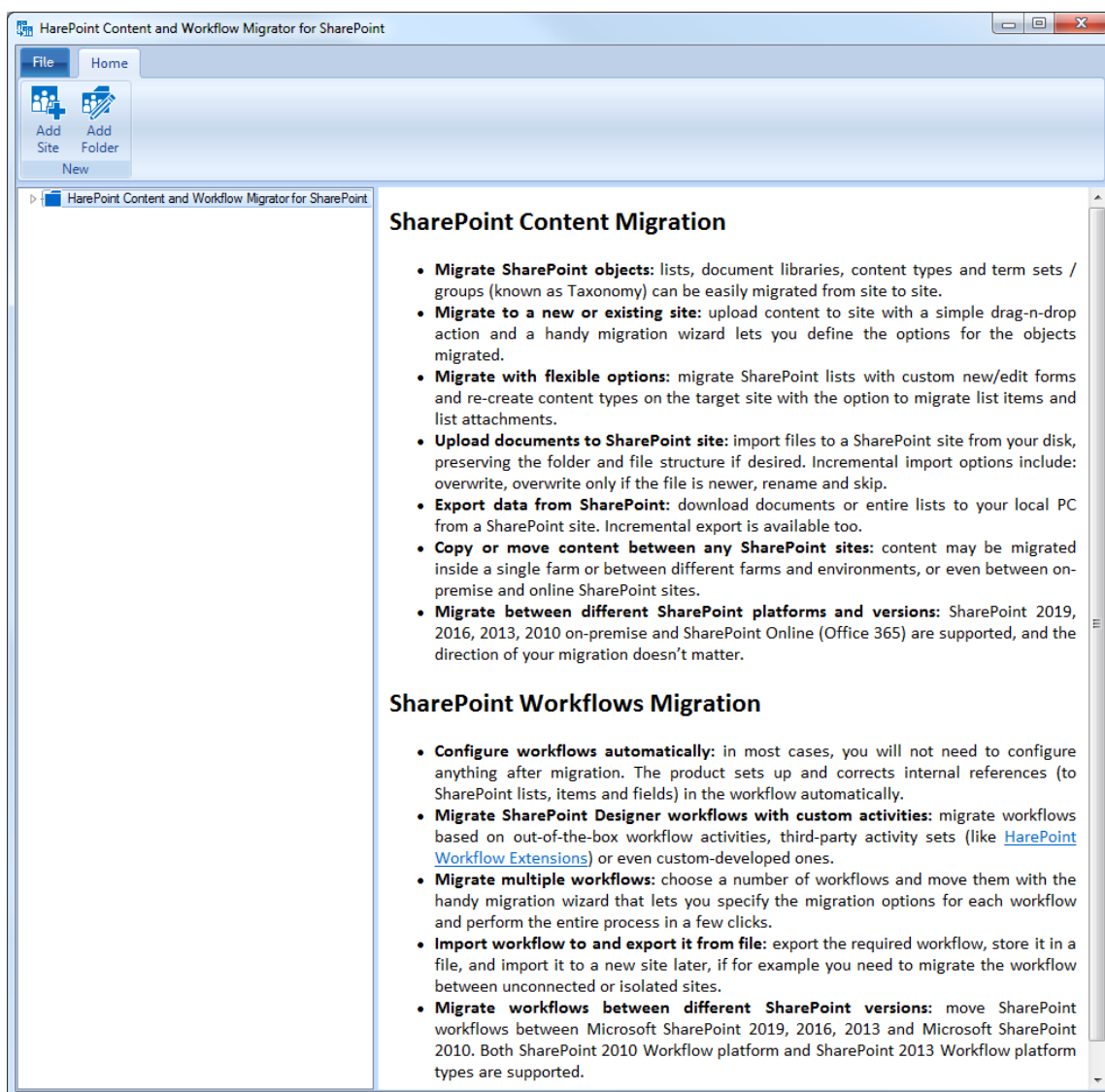
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I. Introduction

SharePoint environment has a lot of content, such as workflows, documents, terms etc. One of the most common concern for a SharePoint administrator is how to migrate these objects from one environment to another (usually from Development to Production environment).

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

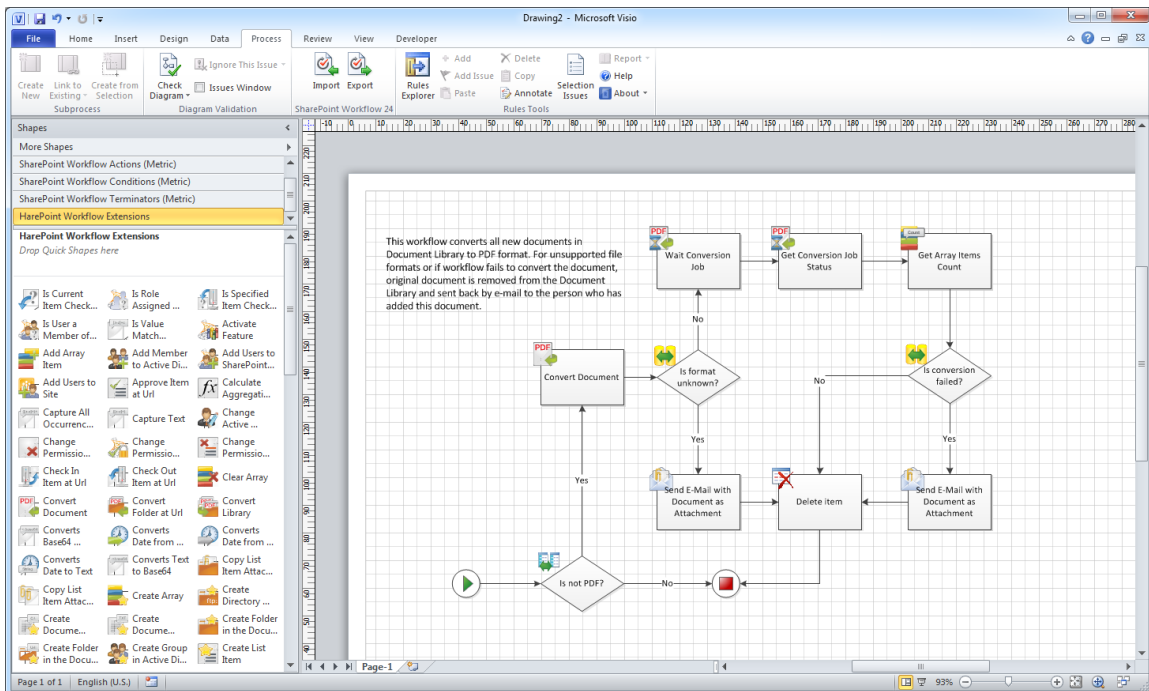


The product supports Office 365 and allows you to migrate content to/from SharePoint Online. The product works both with SharePoint 2010 and SharePoint 2013 workflow platform types.

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

[**HarePoint Workflow Extensions for SharePoint 2010/2013/2016/2019/SE**](#) 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 fully a desktop application and doesn't utilize server-side components. It can be run on the following versions of Microsoft Windows (32-bit or 64-bit):

- Windows Server 2003/2008/2012/2016/2019/2022;
- Windows XP;
- Windows Vista;
- Windows 7;
- Windows 8;
- Windows 10

The product is also compatible with the following server 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 Subscription Edition,
- Microsoft SharePoint Server 2010/2013/2016/2019,
- Microsoft SharePoint Foundation 2010/2013,
- Microsoft SharePoint Online

Both SharePoint 2010 and SharePoint 2013 workflow platform types are 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 either of two license types:

1. Trial License

A 30-day trial period, available for download. **This trial version has the following limitations:**

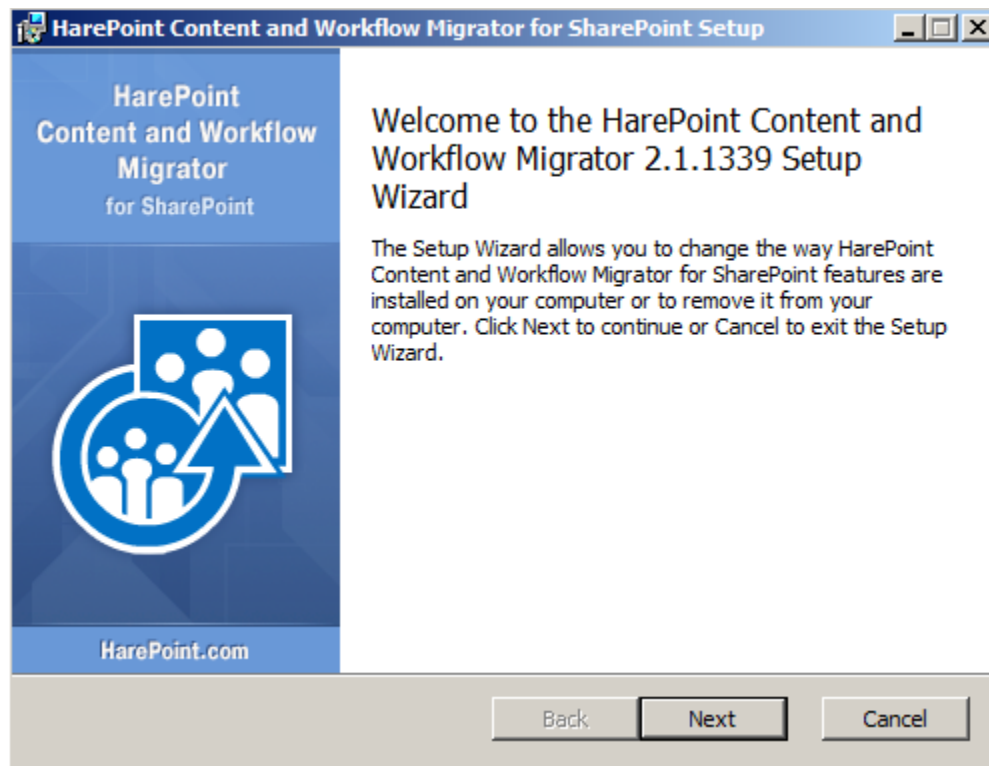
- Only the first 100 list items will be migrated for each list
- Workflows cannot be migrated

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.

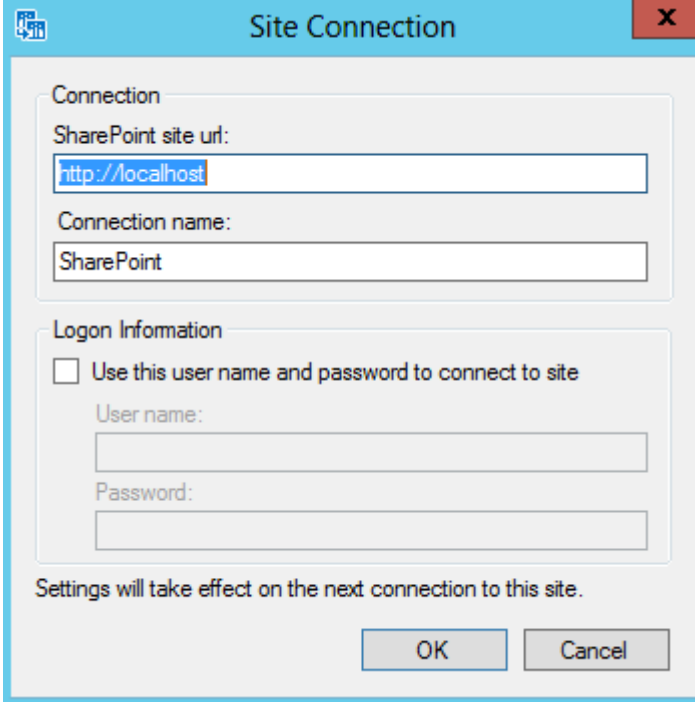
Note: You may install the product on any computer in your organization which has access to the target SharePoint sites.

III. Product Overview

1. Connecting to a site

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:

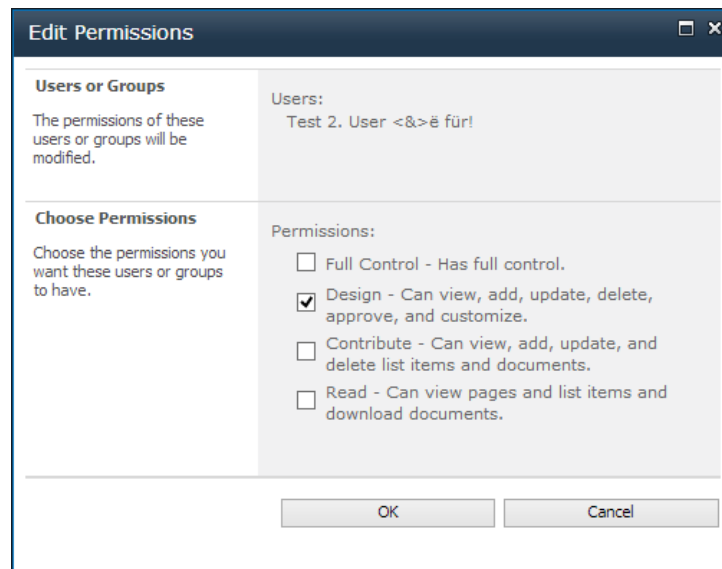


The screenshot shows a dialog box titled "Site Connection". It has a blue header bar with a close button (X) on the right. The dialog is divided into two main sections. The first section, "Connection", contains two text input fields: "SharePoint site url" with the value "http://localhost" and "Connection name" with the value "SharePoint". The second section, "Logon Information", features a checkbox labeled "Use this user name and password to connect to site" which is currently unchecked. Below this checkbox are two more text input fields, one for "User name" and one for "Password". At the bottom of the dialog, there is a line of text stating "Settings will take effect on the next connection to this site." and two buttons: "OK" and "Cancel".

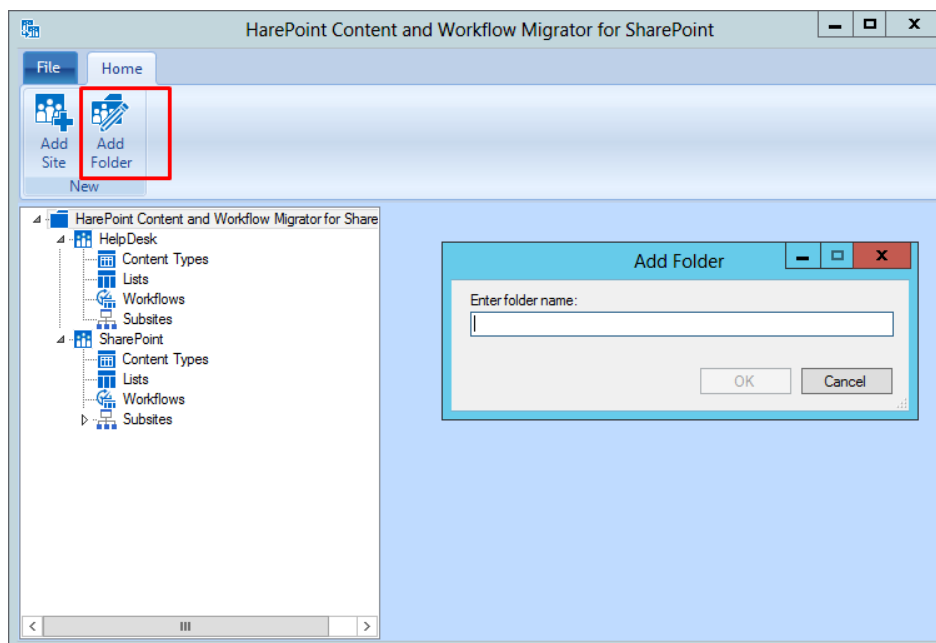
By default, the program connects to the SharePoint site using the current user account. If you need to connect using a different user account, you can specify this in the “**Logon Information**” section.

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

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:

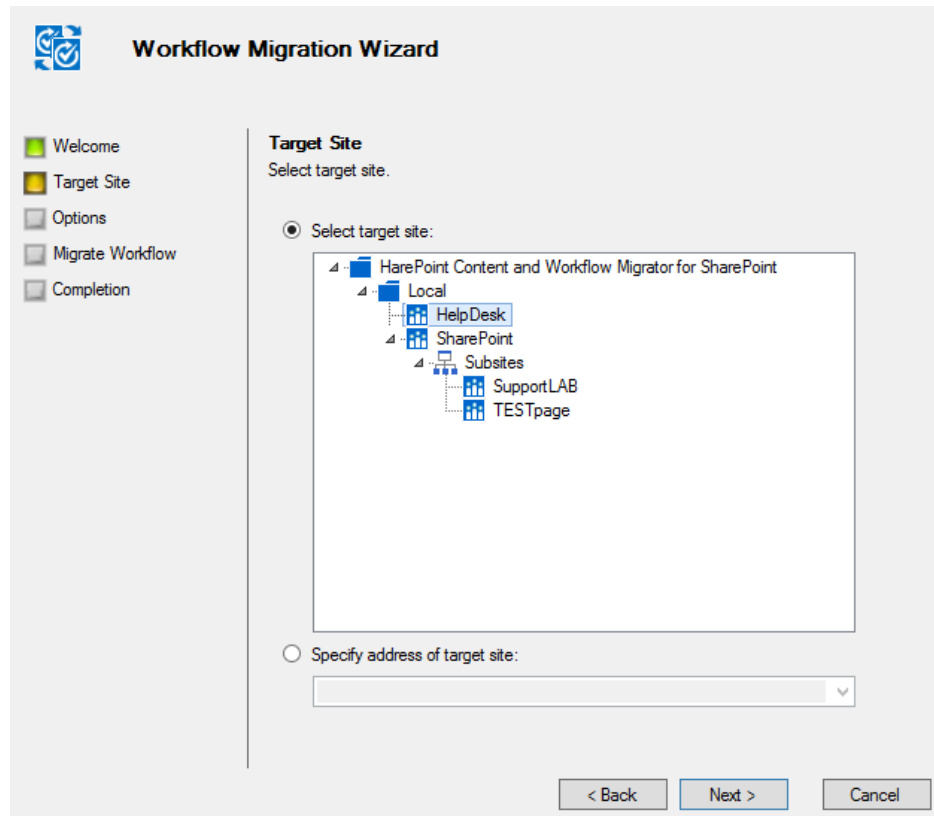


Once the site is added, you can connect to it by clicking the **“Connect”** button on the ribbon. After the connection is established, a list of workflows, lists and content types on this site will be displayed in the right pane. The site hierarchy will appear in the tree view in the left pane. For more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

The screenshot shows the 'Settings' step of the Workflow Migration Wizard. On the left, a navigation pane lists: Welcome, Target Site, Settings (selected), Ready to Migrate, and Migrate Workflow. The main area is titled 'Settings' and contains the following text: 'Select lists on the target site associated with workflow and check start options. Select the value in "Apply to all" row to set it for all other rows. You may drag right bottom corner of the window to expand Wizard window size.'

Workflow Name	Association List	History List	Task List	Start Manually	Start on Create	Start on Change
Apply to all		HarePoint HelpDesk Workflow History	Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convert Documents		HarePoint HelpDesk Workflow History	Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convert InfoPath to PDF		HarePoint HelpDesk Workflow History	Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

These settings include *Association List* (for List workflows), *History List*, *Task List* and *Workflow start options* (manually/on create/on change). Additionally, “**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:

The screenshot shows the 'Migrate Workflow' step of the Workflow Migration Wizard. On the left, a navigation pane lists: Welcome, Target Site, Settings, Migrate Workflow (selected), and Completion. The main area is titled 'Migrate Workflow' and contains the text: 'Wizard is copying selected items to the target site.'

Below the text, there is a progress indicator showing 'In progress...' with a circular arrow icon. To the right of this indicator, the following statistics are displayed: 2 Total, 0 Error, 0 Success, and 0 Warning.

Action	Status	Message
Convert Documents	<div style="width: 100%; height: 10px; background-color: gray;"></div>	
Convert InfoPath to PDF	<div style="width: 100%; height: 10px; background-color: green;"></div>	

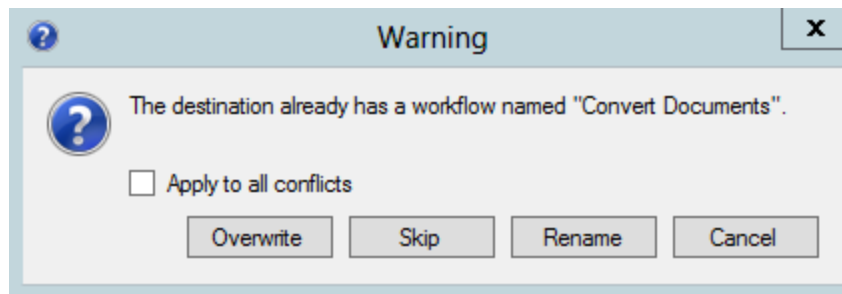
At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

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 Migration Wizard

Welcome
Target Site
Options
Ready to Migrate
Migrate List

Options
Select list migration options. You'll be asked to choose an action if the list with the same name is already exists on the target site.

List title:

Copy list items
 Copy list item attachments
 Copy permissions
 Copy associated lookup lists
 Copy associated content types
 Copy associated list workflows
 Copy associated reusable workflows

< Back Next > Cancel

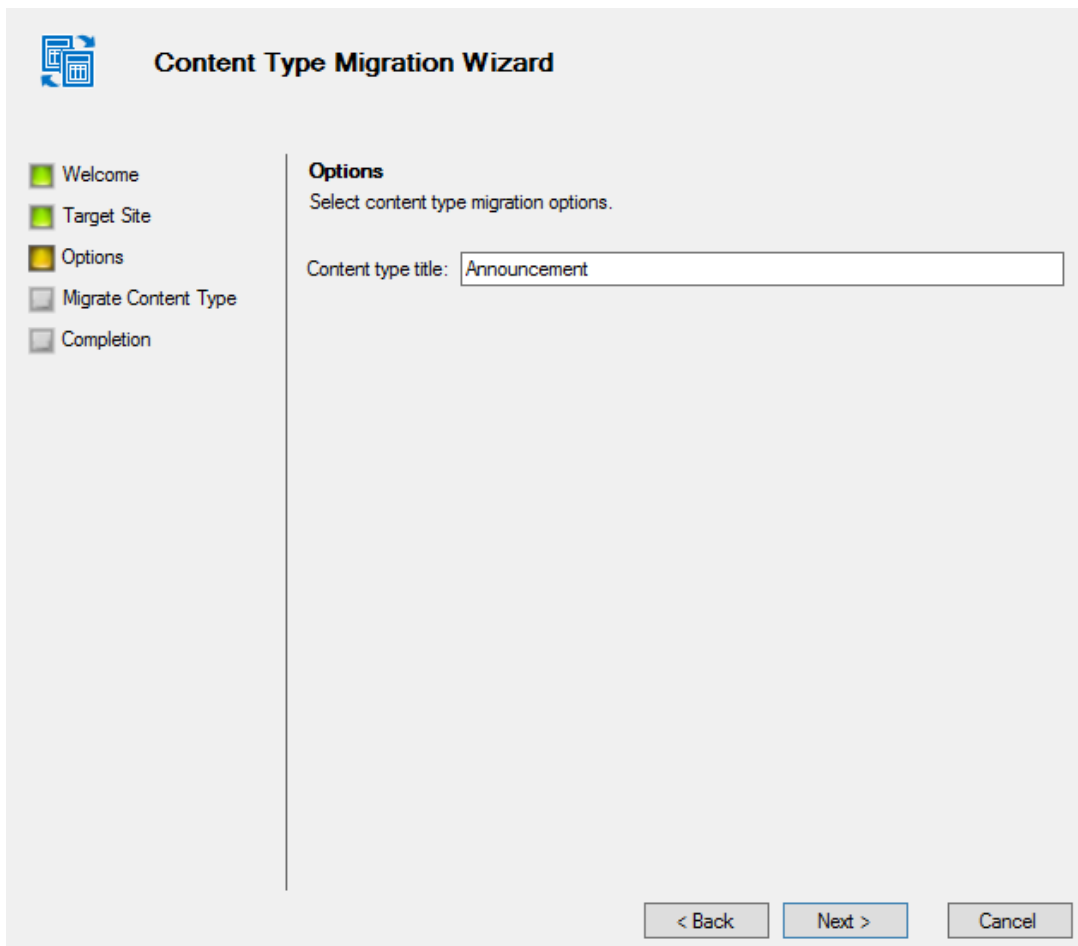
- *List title* – you may rename the list, or leave the original name.
- *Copy list items* - to copy list items or not. If you uncheck this, an empty list will be created on the target site with the same fields, content types and settings as the original one.
- *Copy list item attachments* – by default,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

- *Copy associated lookup lists* – select this option if you need to copy the associated lookup lists as well
- *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 copy list items to an existing list, to overwrite, skip or rename a list.

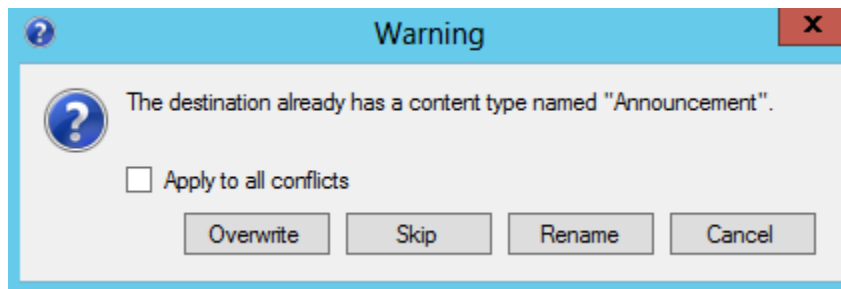
Content types

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



The screenshot shows the 'Content Type Migration Wizard' interface. On the left, a vertical navigation pane contains five steps: 'Welcome', 'Target Site', 'Options', 'Migrate Content Type', and 'Completion'. The 'Options' step is currently selected and highlighted in yellow. The main area of the wizard 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 value 'Announcement' entered. At the bottom right of the wizard, there are three buttons: '< Back', 'Next >', and 'Cancel'.

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.

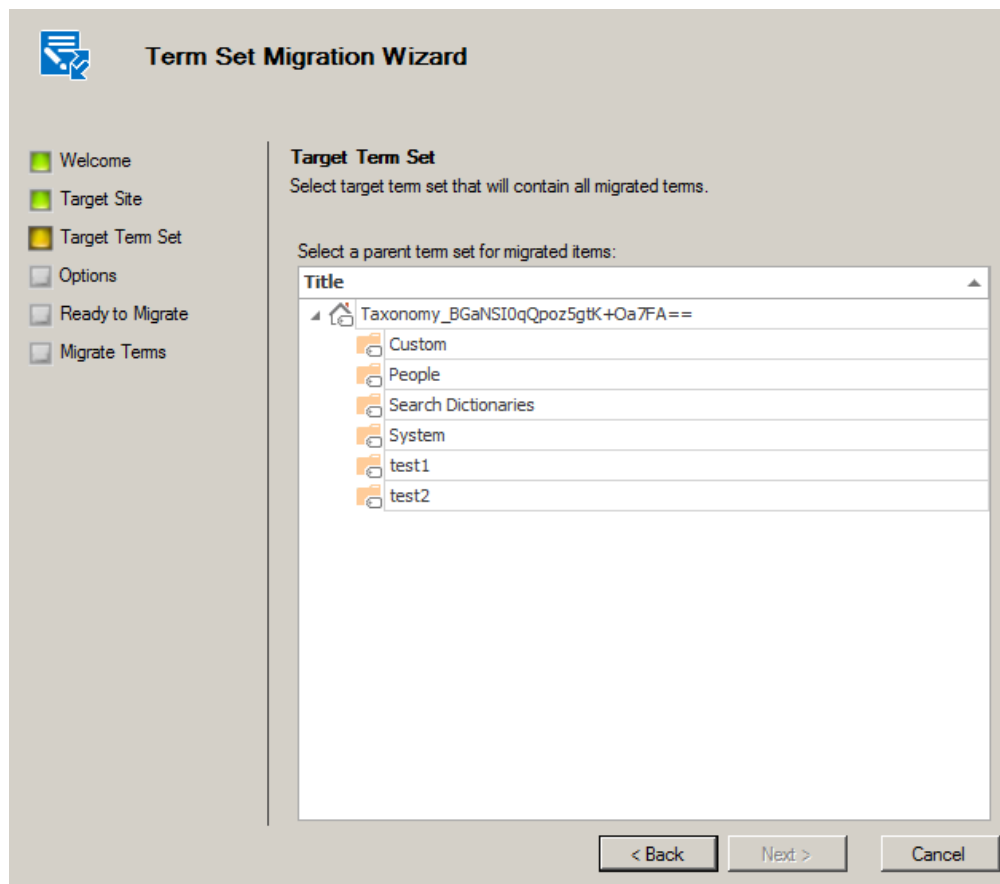


Terms

“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.

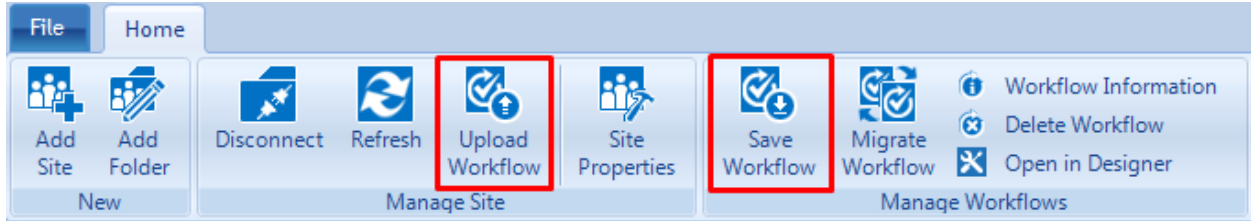
Because of tree view structure, there are different nesting levels of terms. That is, if you are going to migrate a term inside the parent source, you should select the parent target:



3. Additional features

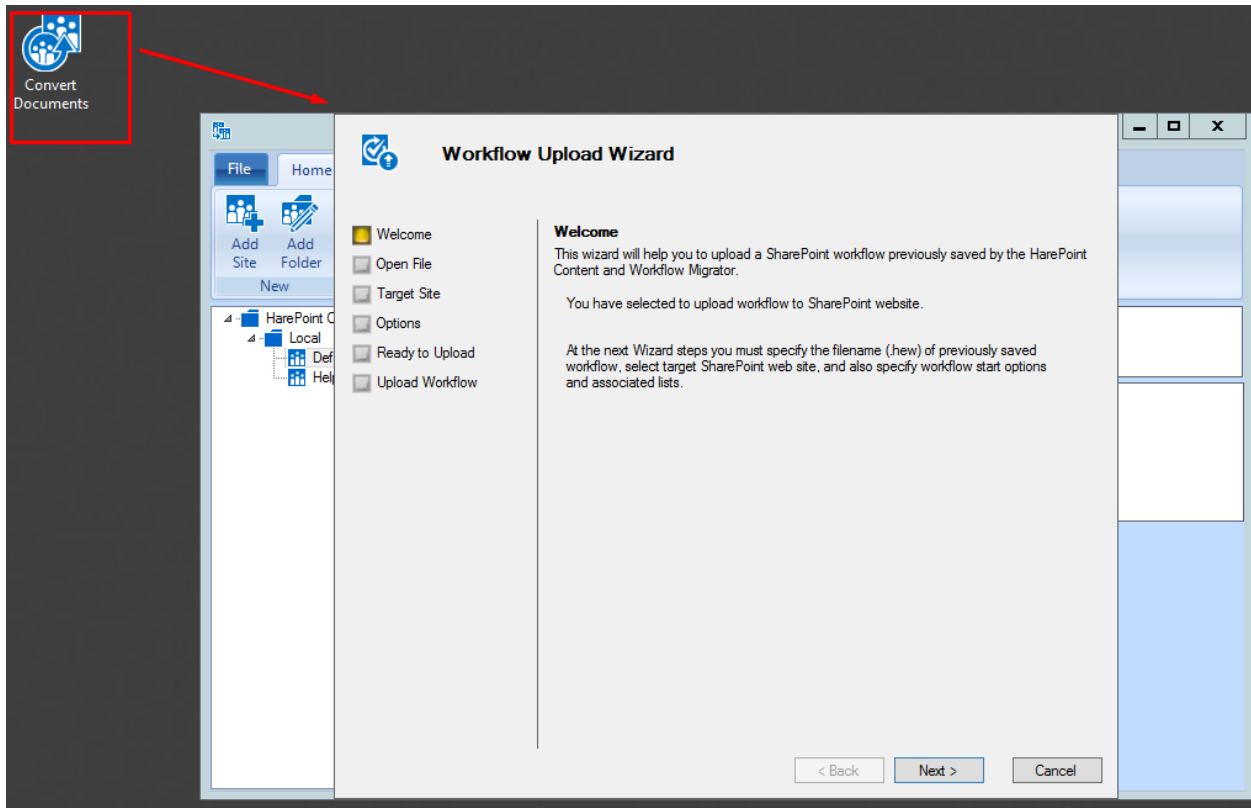
Import and Export

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.

Upon clicking "Upload Workflow" button, the "Upload Wizard" window will appear:



Additionally, this file containing Workflow/List/Content type/Terms, can be imported to another SharePoint site using the “**Upload**” button. The “**Upload Wizard**” window appears in this case too:

Workflow Upload Wizard

- Welcome
- Open File
- Target Site
- Options**
- Ready to Upload
- Upload Workflow

Options
Select lists on target site to associate with workflow. You'll be asked to choose an action if the workflow with the same name is already exists on the target site.

Name of migrated workflow on the target site::
Convert Documents

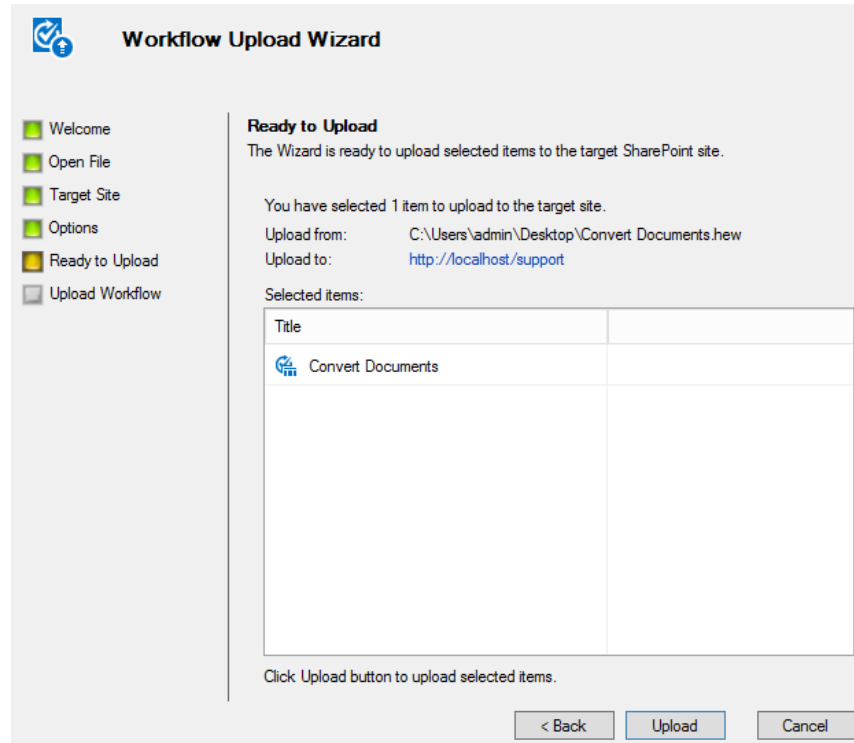
Workflow history list:
HarePoint HelpDesk Workflow History

Task list:
Tasks

Associate workflow with this list:
Attachments

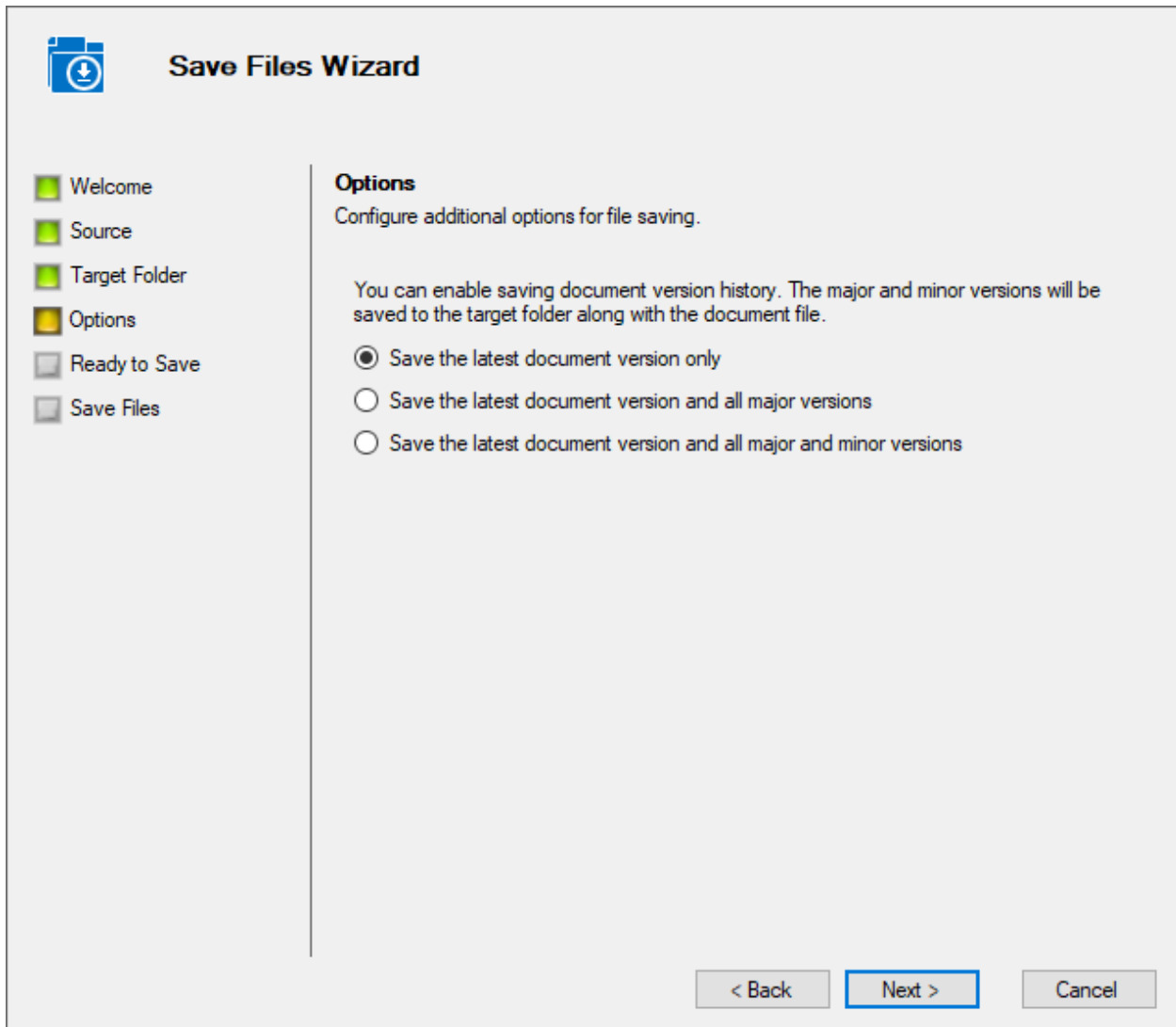
Allow this workflow to be manually started.
 Allow to start workflow automatically when an item is created.
 Allow to start workflow automatically when an item is changed.

< Back Next > Cancel



Save files

It is possible to save selected documents as files to a disk, using **Save Files Wizard**:



If the given document library has versioning enabled, you can choose to save:

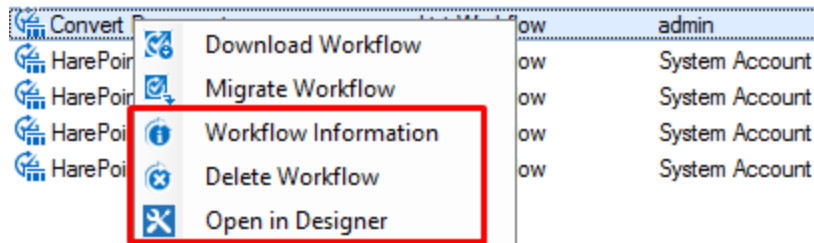
- *the latest document version only*
- *the latest version and all major versions*
- *the latest version and all major and minor versions*

Major and minor versions will have the corresponding version number (v0.1, v0.2, etc.) appended to the file name:

2.txt	01
2.v0.1.txt	01
3.txt	01
3.v0.1.txt	01
3.v0.2.txt	01
14338626037356_75332e588ee840d382f92...	01
14338626037356_75332e588ee840d382f92...	01
A1.docx	01
A1.v0.1.docx	01
A1.v0.2.docx	01
A1.v0.3.docx	01
A1.v0.4.docx	01
A1.v0.5.docx	01
agentLog.log	01

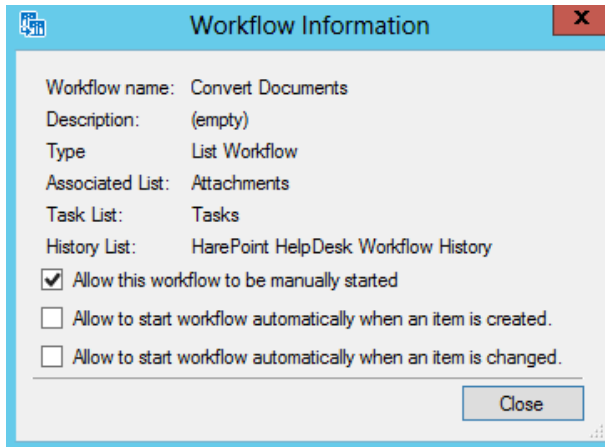
Additional context menu options

For example for Workflows.



- 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: Objects are deleted permanently and cannot be restored! It is always recommended to make a backup before removal.

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

Troubleshooting

When you face an issue 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, reproduce 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).