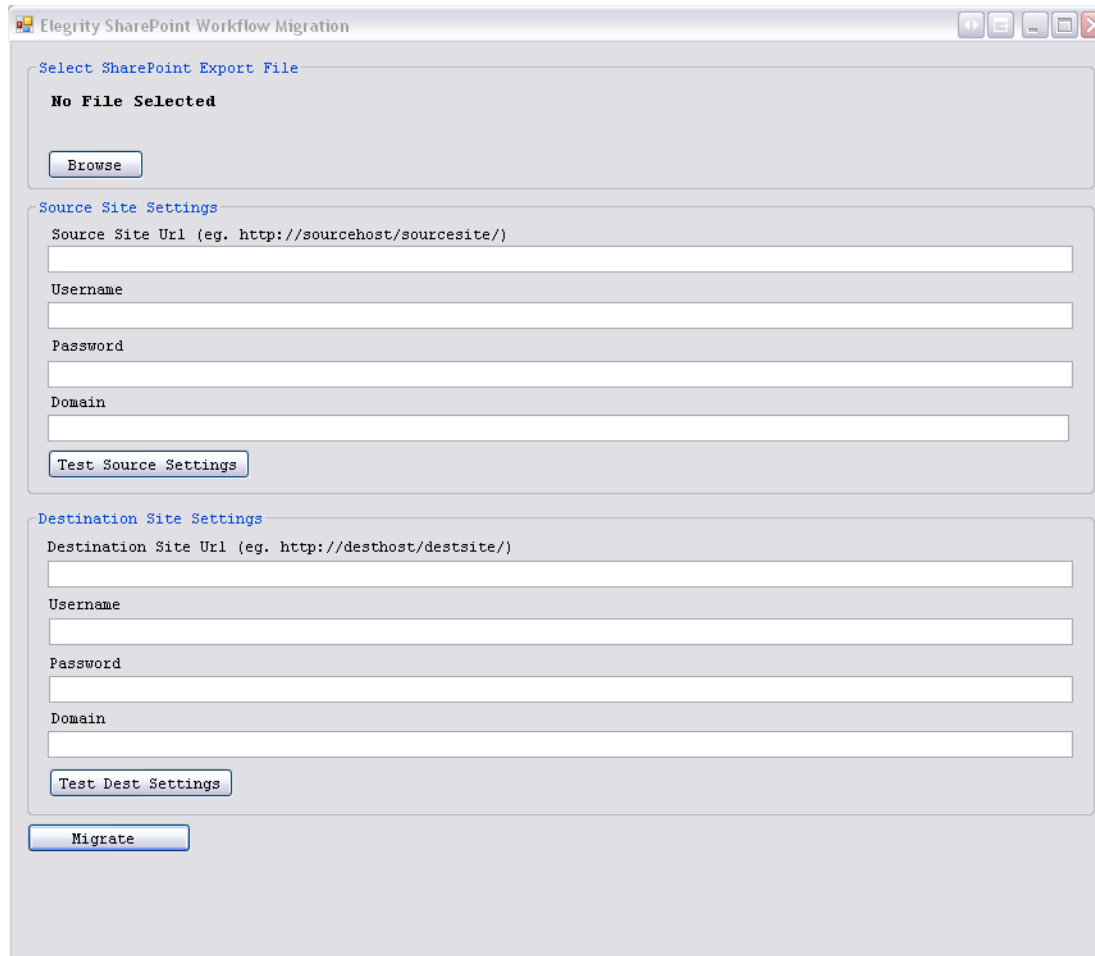


Elegrity Workflow Deployment Utility

November, 1st, 2010

Overview:

The Elegrity Workflow Deployment Utility provides a mechanism to migrate workflows from one SharePoint 2007 site to another site either on the same or different web farms. The utility converts a Personal Web Package exported from SharePoint Designer 2007 to a new Personal Web Package that can be imported into another site.



The screenshot shows a Windows application window titled "Elegrity SharePoint Workflow Migration". The window contains three main sections:

- Select SharePoint Export File:** A section with the text "No File Selected" and a "Browse" button.
- Source Site Settings:** A section with four input fields: "Source Site Url (eg. http://sourcehost/sourcesite/)", "Username", "Password", and "Domain". Below these fields is a "Test Source Settings" button.
- Destination Site Settings:** A section with four input fields: "Destination Site Url (eg. http://desthost/destsite/)", "Username", "Password", and "Domain". Below these fields is a "Test Dest Settings" button.

At the bottom of the window is a "Migrate" button.

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Installation:

Unzip the contents of **the ElegrityWorkflowDeploymentUtility.zip** to the desired installation directory. The following files are contained in the zip file.

- CabLib.dll
- WorkflowMigrationTool.exe
- License Agreement for Elegrity Workflow Deployment Utility.pdf
- Elegrity Workflow Deployment Utility.pdf

Usage:

1. Export Workflows from Microsoft Office SharePoint Designer 2007
 - a. Within Microsoft Office SharePoint Designer 2007, open the source site that contains the SharePoint Designer Workflows you wish to migrate to another site.
 - b. Export workflows to a Personal Web Package
 - i. From within Microsoft Office SharePoint Designer 2007, select File -> Export -> Personal Web Package
 - ii. From within the Export Web Package dialog, select the workflows you wish to export and click **Add** to add them to the Files in Package.
 - iii. Click **OK**
 - iv. From within the File Save dialog, browse to the location where you want to save your Personal Web Package and click **Save**.
 - c. Verify that all prerequisites are met before running the Elegrity Workflow Deployment Utility (see next section for details)
2. Run Elegrity Workflow Deployment Utility
 - a. Double click on the WorkflowMigrationTool.exe from within the installation directory.
 - b. Select the SharePoint Export File containing your workflows
 - i. Click the **Browse** button
 - ii. Select the exported Personal Web Package that was saved in step 1.b.
 - c. In the *Source Site Settings* section enter the following:
 - i. Source Site URL (e.g. <http://sourcehost/sourcesite/>). Note: the last character must be a forward slash "/"
 - ii. Username (Note: This user must have the appropriate rights to read all site content.)
 - iii. Password
 - iv. Domain
 - v. Click Test Source Settings. **Success** will be displayed if the user entered is able to read lists within the source site.
 - d. In the *Destination Site Settings* section enter the following:

- i. Destination Site URL (e.g. <http://destinationhost/destinationsite/>). Note: the last character must be a forward slash “/”
 - ii. Username (Note: This user must have the appropriate rights to read all site content.)
 - iii. Password
 - iv. Domain
 - v. Click Test Dest Settings. **Success** will be displayed if the user entered is able to read lists within the destination site.
 - e. Click the **Migrate** button to migrate the workflows
 - i. If successful, a message will be displayed “Import package successfully created” and the location of the migrated personal web package will be displayed. Note: the migrated Personal Web Package will be placed in the same directory as the source file and named **sourcename_migrated.fwp**.
3. If the destination site does not contain any workflows, create a dummy workflow so that the Workflows folder is created within SharePoint Designer for the site.
4. Import Workflows
- a. Within Microsoft Office SharePoint Designer 2007, open the destination site in which the migrated workflows will be imported.
 - b. If any of the workflows being imported already exist in the destination site, back them up and delete them from SharePoint Designer (right click on the workflow -> Delete).
 - c. Import workflows from the migrated Personal Web Package
 - i. From within Microsoft Office SharePoint Designer 2007 select File -> Import -> Personal Web Package
 - ii. From within the File Open dialog, select the migrated Personal Web Package (created in step 2.e).
 - iii. Click **Open**
 - iv. From within the Import Web Package dialog, select the workflows that you wish to import and click **Import**.
 - v. If a Microsoft Office SharePoint Designer – Security Warning is displayed, click **Run**
 - vi. A new folder within Microsoft Office SharePoint Designer 2007 will be created named **Migrated Workflows – Date and Time of Migration** which will contain the migrated workflows.
 - d. Within Microsoft Office SharePoint Designer 2007 move the workflows from the **Migrated Workflows – Date and Time of Migration** folder to the Workflows folder (drag and drop the workflow).
 - e. From within Microsoft Office SharePoint Designer 2007, open each workflow (*workflowname.xml*) in the workflow designer (double click the file) and click **Finish** to republish the workflow.

Prerequisites

Before running the Elegrity Workflow Deployment Utility, verify the following criteria are met:

- For each workflow being migrated, verify that all SharePoint list names and field names used within the workflow are identical between the source and destination sites.

- Verify that the all workflows to be migrated run correctly before exporting them from the source site
- Make a backup of any workflows in the destination site before running the import
- Delete any workflows that will be imported before running the import (workflows are not overwritten, a new duplicate workflow will be created if it already exists)

Troubleshooting

If the migrated workflows are not migrated correctly, verify the following:

- Verify that the user name, password and domain used are correct.
- Verify that the users being used for the source and destination site are able to read all lists
- Verify that ALL SharePoint lists and filed names are identical between source and destination sites.
- Verify that the site name specified in the Elegrity Workflow Deployment Utility are valid and that they end in a forward slash “/”
- Verify that the destination site in SharePoint Designer 2007 has a Workflow folder (this is created when the first workflow is created for the site)