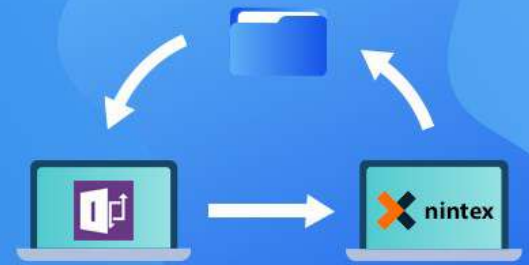# Legacy **InfoPath forms** and **workflows migrated** to **Nintex** for a nonprofit research institute

Client Business Description

Our client is a leading nonprofit biological research center that collects, stores, and distributes standard reference microorganisms, cell lines, and other materials for research and development.

Objective

The client decided to transfer their existing SharePoint On-premises installation to SharePoint Online, including all contents and functions, as part of their journey to adopt cloud services and storage.

Challenges

The client has invested a lot of time developing InfoPath forms and workflows. However, the software did not work for their needs anymore because Microsoft retired InfoPath in favor of new option from SharePoint, Access, and Word. It became crucial for the client to make a move from the traditional InfoPath forms and workflows to a newer, supported tool.

Because of the client's extensive InfoPath footprint, it was necessary to perform a complete migration to a new tool in an organized manner with no downtime or issues. The complex forms created in InfoPath support critical business processes, so it was necessary to create a well-thought-out conversion plan.

Solution

The Beyond Intranet SharePoint team created a robust plan to make this migration happen on schedule and without any interruptions in their process. The first question we decided to answer was "which platform should we migration to from InfoPath"?

We had three major options for choosing the new platform:

01 Nintex forms and workflows	02 PowerApps forms	03 The Microsoft SPFx toolkit

We decided to utilize **Nintex forms** because:

⦿ Many of the existing InfoPath forms had a complex UI design, rules, and custom code

⦿ The client already had Nintex Forms and Workflow licenses for the online version.

We identified how we should migrate to Nintex Forms and what we need to cover to ensure:

◆ **Content migration** worked on the migration tool.

◆ All InfoPath forms migrated to the Nintex forms.

◆ **SharePoint designer workflows migrated** to the Nintex workflows.

Our Approach

Our experts planned the entire migration process because experience taught us that planning is the most critical part of the process. Our team thoroughly researched sound principles for the transfer of InfoPath forms, SharePoint designer workflows, and Nintex.

We followed a basic approach:

Gathered Information from their.xsn InfoPath files and .vwi Workflow files and screenshots.

Reviewed the existing forms/workflows for more clarity on their business logic for using specific processes.

Documented what we learned to implement in the migration.

Implemented the forms and workflows according to their business processes in Nintex.

Why Nintex

Nintex was a clear preference of our experts and the client team due to the following reasons:

01
Offers great mobility and portability

02
Create reusable components and save forms as templates

03
Has some great built-in functions to build complex formulas to use in rules and calculated values by utilizing provided inline and runtime functions

04
Promotes advanced functionality customizations

05
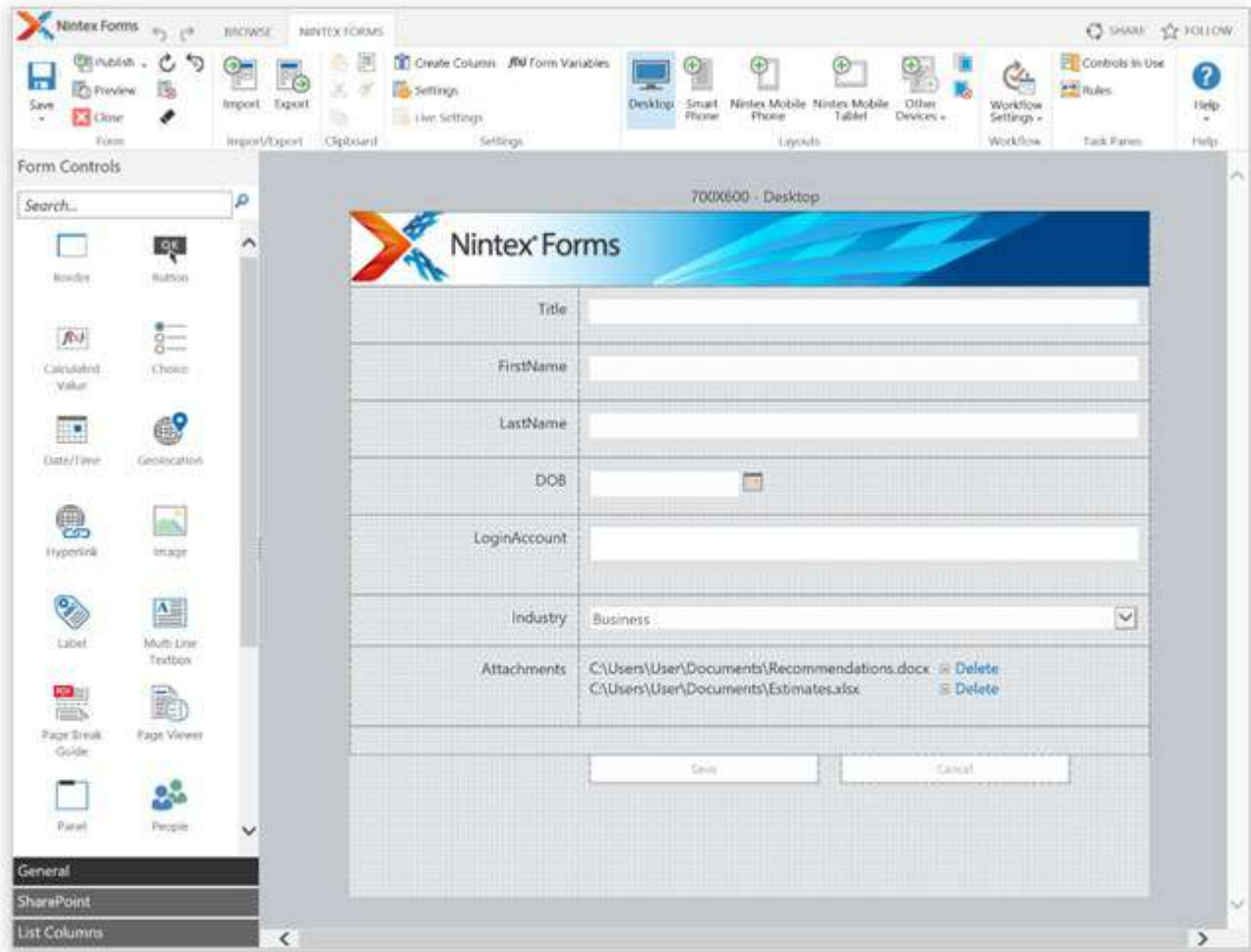Supports to form and workflow variables

06
Produces robust, interactive forms with powerful controls, such as Geolocation, Managed Metadata, Change Content-Type, and Workflow Diagram.

Results

The client was able to successfully migrate all the legacy InfoPath Forms and SharePoint workflows to Nintex forms and workflows.

- The new forms were updated and developed with new and rich Nintex designs.
- The team could access the forms from anywhere using mobile devices.
- All the content and functionality were successfully migrated to SharePoint Online.
- The new forms were well supported and managed by Microsoft.

Dashboard