



# Moving from InfoPath to NITRO Studio

A guide to a smooth transition from InfoPath forms and workflows to Crow Canyon Software's NITRO Studio

 **Crow Canyon** Software

 **NITRO** STUDIO



Preferred

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Business Applications

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# Moving from InfoPath to NITRO Studio

## Introduction

***THE TIME IS NOW!***

Microsoft ended development of InfoPath in 2013, leaving people who had created forms – sometimes 1000's – in a bit of a lurch.

Microsoft says some versions of InfoPath will be supported until 2026. However, no new features are being added, and there is no guarantee that future enhancements to SharePoint and Office 365 won't prevent some InfoPath features from working.

The reasons Microsoft deprecated InfoPath are many. In short, it uses an old technology that is not adapted to the cloud and mobile world we now live and work in.



***“Now is the time to start thinking about migrating your InfoPath forms to other solutions.”***

 **Microsoft**  
April 30, 2018

InfoPath 2010: Mainstream support has ended.

InfoPath 2013: Mainstream support has ended. Extended support ends July 2026.

# InfoPath is Holding You Back

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InfoPath was released as part of Microsoft Office 2003, and the technology it used was appropriate for that time. Since then, the IT world has marched on rapidly, leaving InfoPath in the dust. Microsoft gave up on further developing of InfoPath back in 2013, realizing that InfoPath could not be retrofitted for the new cloud and mobile world.

Mobile interfaces, responsive designs, device-agnostic solutions, improved browser technology, and efficient back-end infrastructures are the new norm. InfoPath's reliance on old technology and lack of support for both mobile devices and modern web browsers leave it severely lacking.

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***Even if InfoPath was not being phased out, organizations would still want to move off it to take advantage of new technologies.***



Not mobile-friendly, lacks responsive design



Limited compatibility with latest browsers



Outdated, clunky technology (XSN, XML)



No longer being developed by Microsoft



Difficulty connecting to other services and data sources

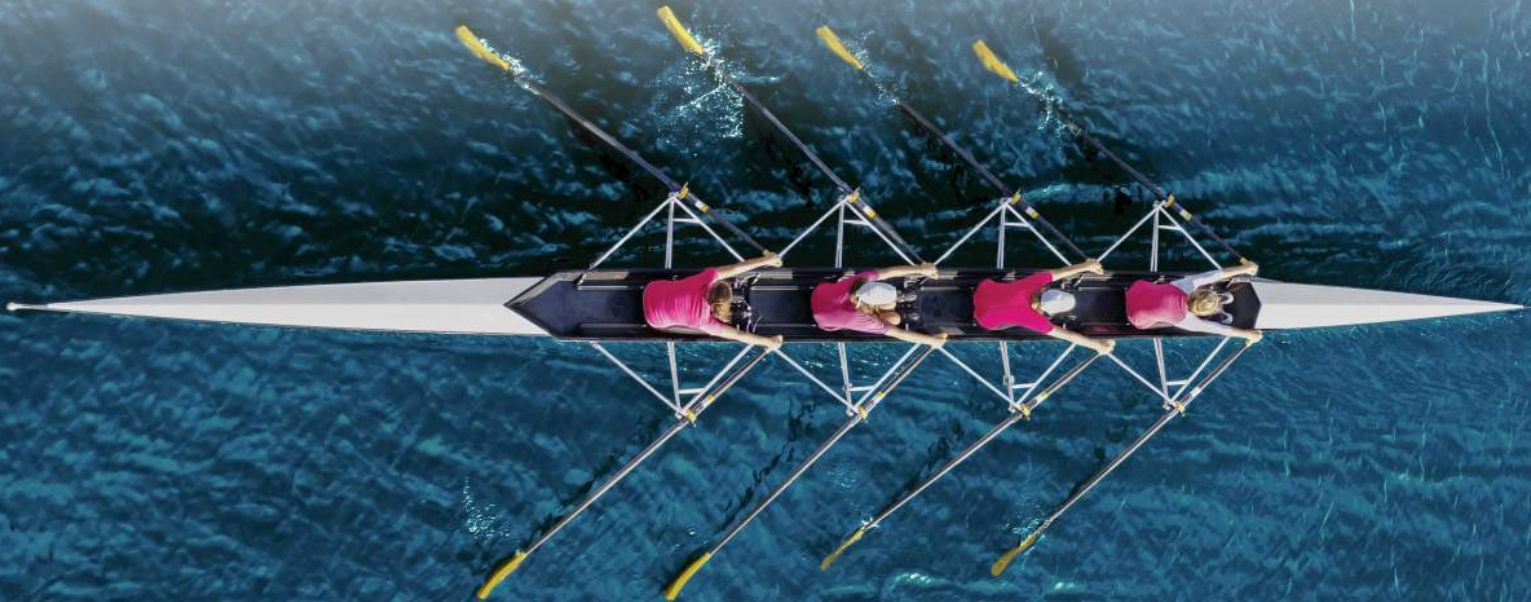


# Why Use NITRO Studio to Replace InfoPath?

✓ **COMPREHENSIVE** and **POWERFUL** enough to handle any business process automation requirement.

✓ **EASY** and **SIMPLE** enough for power users to start creating forms and workflows right away.

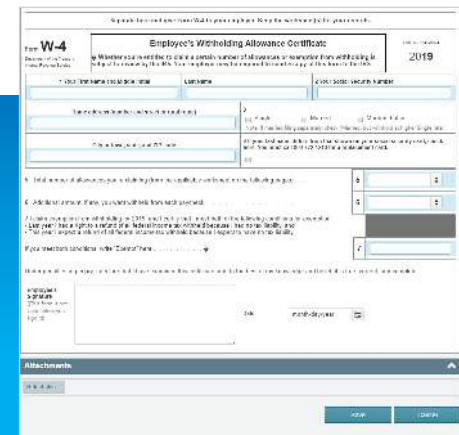
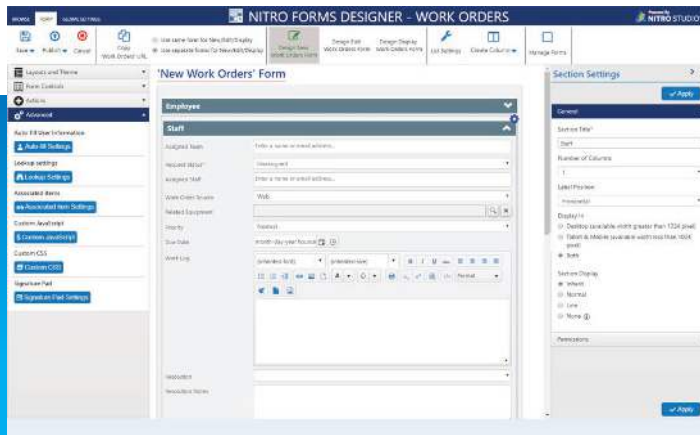
✓ **AFFORDABLE** pricing based on sites and users, not number of forms and workflows



# NITRO Studio Eases the Transition

***NITRO Studio is a full application creation suite and business process automation platform built specifically for SharePoint and Office 365.***

- **Complete set of tools** that are easy-to-use, fully integrated, and comprehensive.
- **No-code application creation platform** for SharePoint on-premises and Office 365.
- **WYSIWYG Forms Designer**, Workflow Manager, Custom Actions, Application Portals, Reporting Tools, and much more.
- **Advanced features** such as chatbots, Modern UI, multi-departmental portals, database integration, extensibility, and more.



## **NITRO Forms**

gives users the power to create dynamic, responsive custom forms in SharePoint and Office 365.

It comes with a WYSIWYG Forms Designer where forms are easily created using drag-and-drop controls.

The Forms Designer has options for tabs, sections, themes, action buttons, scripting, permissions, and many other features that give organizations the power to create the forms they need.

# NITRO Forms

## The *INFOPATH* Replacement



### **DYNAMIC FORMS**

Forms adapt to user input, show different fields based on conditions



### **RESPONSIVE DESIGN**

Mobile-friendly interfaces allow deployment of forms on any device



### **PORTABLE FORM TEMPLATES**

Import/export function copies forms and settings to multiple lists



### **LINKED ITEMS**

Related items linked together in parent-child relationships



### **REPEATING ROWS**

Grids where multiple items can be added with totals of number and cost



### **CUSTOM ACTIONS**

Buttons and scripting to initiate a wide range of workflows



### **PORTAL INTERFACES**

Interactive, intuitive portals that power end user engagement



### **DATABASE INTEGRATION**

Pre-populate fields, write back to databases and Active Directory



### **ELECTRONIC SIGNATURES**

Capture electronic signatures on desktop, mobile, or tablet



## NITRO Workflows

allow easy automation of business processes.

## Custom Actions

give users the power to initiate workflows via buttons on the form and in the ribbon.

# NITRO Workflows & Custom Actions

*Workflows & Custom Actions drive business processes forward using automated and user-initiated functions.*

### NITRO Workflow Manager

Simple or complex workflows that run based on user input, changes to data, system events, or a timer basis. Robust features enhance the productivity of developers, yet are also simple enough to be implemented by power users.

### NITRO Custom Actions

The simple click of a button initiates a set of actions that move the business process towards completion. Using Custom Actions, staff can automate many activities that involve repeated and labor-intensive steps.

#### *Automate processes such as:*

- Approvals
- Escalations
- Auto-assignment
- Task management
- Notifications & alerts
- Scheduled reports
- Document generation
- Integration with external systems





## Additional Components

NITRO Studio includes many other components that power business process automation solutions. The Studio provides a comprehensive set of features that allow you to replace InfoPath forms and enhance the underlying processes.

## What else is included in NITRO Studio?



### PORTALS

Application portals, Modern or Classic UI, responsive, multi-departmental



### REPORTS & DASHBOARDS

Charts, graphs, tables that display actionable data both historic and real-time



### AI SERVICES

Chatbots, Team Bots, Natural Language Processing (NLP)



### LIST FORMATTING

Conditional highlighting, displaying progress bars and KPI's



### EMAIL MANAGER

Custom email responses, canned messages, capture email history



### EMAIL SYNCHRONIZATION

Convert emails to SharePoint list items such as tickets, issues, leads



### LIST ROLLUP, LIST SEARCH, LIST VIEW

Various ways to search and display list items including rollups of multiple lists



### MODERN UI

Set of web parts that enhance Modern UI pages and sites



### PRINT MANAGER

Highly configurable templates for printing lists or individual items

## BEST PRACTICES

What are the best practices to move from InfoPath to NITRO Studio as smoothly and efficiently as possible?

InfoPath replacement is not as simple as flipping a switch or pushing a button. Each project is unique. You may need to replace just one form, or dozens, hundreds, even thousands. The forms may be mission-critical or may be little used. There might be a tight deadline on the project or an extended time-frame. Users may be willing and excited to change or they may be reluctant.



## Rule #1 **STOP CREATING INFOPATH FORMS**

*You will just make it harder in the long run if you keep creating more InfoPath forms that will need to be replaced.*



***If in a hole, stop digging!***



## Think in terms of “**Solutions**”, not just “Forms”

The goal is not to blindly replicate InfoPath forms but to develop solutions using newer technologies available on SharePoint and Office 365. Consider:

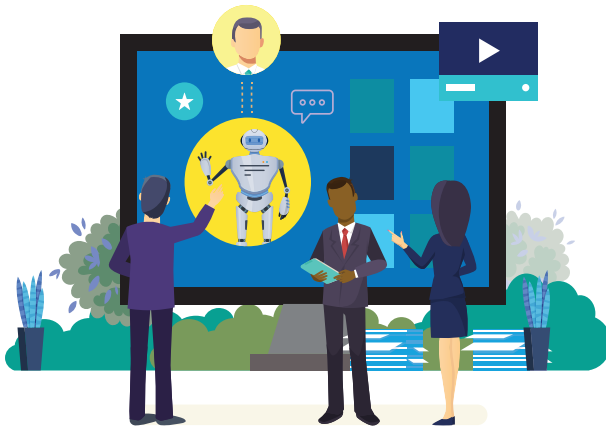
- *What is the business purpose?*
- *What problem is the InfoPath form solving?*
- *What new ways of solving the same problem can be done with the technology now available?*

### UPGRADING SOLUTIONS WITH MODERN TECHNOLOGIES

In many cases, the business process can be enhanced with:

- Mobile options with responsive designs
- Modern UI in SharePoint and Office 365
- More evolved and extensive database integration
- Portal interfaces that engage users and allow multi-departmental interaction
- AI Services like chatbots and natural language processing

The best approach is to understand the business requirement behind the InfoPath form and consider how to implement a modern solution that enhances the process.



## In some situations, **EXACT REPLICATION IS NEEDED**

### REGULATORY REQUIREMENTS

Regulatory, compliance, governmental, or corporate standards require exact replication of the form.

### DESIGNED BY COMMITTEE

The form was decided upon by an exhaustive process involving multiple parties and it would require going through that same laborious process to modify it.

### TRAINING COSTS

Training end users on a revised form would be costly and time-consuming, and require the rewriting of manuals and documentation.

In these cases, the forms need to be replicated precisely like the current InfoPath ones. There's not much to be done except to reproduce the form and workflows in the new environment.



## What about **AUTOMATIC TRANSFER** of forms, data, and workflows?



### **FORMS: Can the UI of InfoPath forms be automatically converted to a modern forms solution, such as NITRO Studio?**

Modern form technology is so different from the older InfoPath technology that there is no way to export the InfoPath form structure and use that to create a form in the new solution. There are just too many variables.

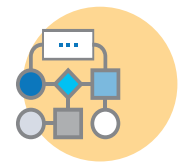
Some have tried to do this, but have run into a considerable number of issues. InfoPath forms can be quite complex! The conclusion is that it is more work to correct an incomplete “transfer” than to rebuild the form from scratch.



### **DATA: Can the data in InfoPath forms be transferred to a new solution?**

With the right tools, InfoPath data from user submissions can be transferred to SharePoint lists. However, this is just the data, not the forms and workflows. Forms and workflows must be recreated to read and utilize that data.

Often, it is better to start over with a new solution rather than migrate data. This can improve efficiency, reduce overhead, and improve form load times. The data can be archived to a database or left accessible for reference via the old InfoPath forms.



### **WORKFLOWS: Can workflows that run on InfoPath forms be transferred?**

Due to the complexity of how workflows are built on InfoPath, there is no way to automatically transfer them to a new solution. Workflows must be rebuilt.



## Involve the End Users!

An important step, often overlooked, is getting user feedback, and using that input to guide the InfoPath replacement effort. Every organization has different types of users accessing various forms for different purposes. Involving the end users and stakeholders will help ensure the successful implementation of a new solution.

### ✓ DESIGNING

- Simplify the form, if possible
- Make navigation of the form easy
- Make the form attractive
- Use dynamic design to show/hide controls and sections based on users and input
- Pre-fill information from Active Directory, databases, and other sources
- Accommodate many different types of users

### ✓ TESTING

- Provide sufficient time for testing
- Run user acceptance testing: revise form as needed based on user feedback
- Test the forms and workflows for quality assurance: fix any defects, ensure stable performance
- Test on different browsers and on mobile phones and tablets

***Get user feedback throughout the process!***



## Consider the **SCOPE** of the Project

### **INCREMENTAL**

An incremental approach means replacing just one (or only a few) InfoPath forms. This could be because there is no company-wide initiative to replace all InfoPath forms, yet one department or group wants to move to a new solution.

In this case, the group can start by analyzing the business process that the form fulfills, seeing if any modifications are needed or possible, then moving ahead with finding either a pre-built solution that satisfies the requirements or building a custom solution using a tool such as NITRO Studio.

### **FULL REPLACEMENT**

A full replacement of InfoPath forms requires a more comprehensive approach. First, a catalog of InfoPath forms needs to be generated. Then the list of forms can be culled to eliminate ones that are no longer needed. Each remaining form should be reviewed to determine the best replacement.

- An exact copy of the form and workflow due to regulatory and other reasons?
- A revised and modernized version incorporating new technologies?
- A pre-built application that can save customization and development work?

The effort involved in an InfoPath replacement project depends on many factors: the organization's culture, the number of forms, the complexity of the business processes, where the solution fits into the overall business, and more. Take on what you can handle successfully.



## Taking it **STEP-BY-STEP**

A measured approach will ease your transition from InfoPath forms to NITRO Studio. Projects can fail if too much is taken on all at once. Every InfoPath replacement effort requires careful consideration of the impact on the organization and users.



**TOE IN WATER** | Start by experimenting with NITRO forms. Get a trial of NITRO Studio and see what it takes to re-create an InfoPath form. A trial run will give you a good sense of what can be done before making any production changes.



**WADE IN SLOWLY** | Change one or more InfoPath forms to NITRO forms. Implement workflows, custom actions, and other NITRO features. Test thoroughly. Have users try it out. Adjust as needed based on their feedback.



**DIVE RIGHT IN** | After gaining confidence using NITRO Studio, you are ready to move forward with the full-scale conversion of InfoPath forms to production NITRO Studio forms. Go at a pace that is appropriate for your organization. Remember to keep incorporating user feedback.

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**We offer guidelines in the following pages to help with your transition.**



# How to transition from InfoPath to NITRO Studio

The best way to transition off InfoPath forms is unique to each company. What we offer here is a template of how a transition can take place. Modify this as best suits your circumstances.



## **CATALOG THE FORMS:**

What InfoPath forms do we have in place now?



## **ASSESS & ANALYZE:**

Eliminate unnecessary forms.  
Determine effort to replace remaining forms.



## **CONSIDER ALTERNATIVES:**

Can a pre-built application fill the need?



## **IMPLEMENT NEW SOLUTION:**

Create solutions that replace InfoPath.



## CATALOG THE FORMS: *What InfoPath forms do we have in place now?*

The first step is to build a catalog of InfoPath forms with useful meta-data about each one. This catalog will be used in later steps as you plan and execute the transition.

If you know what InfoPath forms are in your organization, you can list them out manually. If you do not have that information, you can run a PowerShell script that will extract out details on the InfoPath forms. (There are also commercial tools that do this. Contact Crow Canyon Support for more information.)

The catalog can be as simple as a spreadsheet or you can use a tool such as Crow Canyon's InfoPath Replacement Manager application.

**Crow Canyon's InfoPath Replacement Manager** application allows you to enter the information about each form manually or by importing it. Meta-data about each form – who uses it, who is responsible for it, what the purpose is, how often it is used, last usage date, etc. – is recorded in the application.

This application helps you manage the project of replacing the InfoPath forms. It brings status updates, notifications, approvals, sub-tasks, and other features to the InfoPath replacement project. You can track progress of the new solutions and their implementations.

In this way, you will have a comprehensive list of the InfoPath forms with a tool that can be used to guide the transition to a newer solution.





## ASSESS & ANALYZE THE CATALOG:

*Eliminate unnecessary forms.*

*Determine effort to replace remaining ones.*

1

Examine each form and determine if it is still serving any business purpose. If not, it is pointless to replicate it. Whittling down the list saves the time and effort of recreating forms that are not in use.

2

Next, analyze the forms to determine the effort and resources needed for a successful InfoPath replacement.

*Consider factors such as:*

**COMPLEXITY:** How complex is it? Is it dynamic? How many approvals and workflows are involved? Does it interact with other forms? Does it require database integrations?

**CRITICALITY:** How many people use it and how often? How important is it to the business? Does it need to be replaced sooner than others?

**CUSTOMIZATIONS:** Were there features added due to particular needs of a group? Do these need to be replicated?

**MODIFICATIONS & ENHANCEMENTS:** Are there enhancements that can be added such as mobile access?





## CONSIDER ALTERNATIVES: *Can a pre-built application fill the need?*

Can a pre-built application fill the business need and thereby eliminate a substantial amount of work? At the time the InfoPath form was created, there may not have been a third-party application available. But that could have changed.

***Before developing a custom solution, consider pre-built applications!***



### CROW CANYON'S BUSINESS APPLICATIONS

Crow Canyon Software offers these SharePoint & Office 365-based applications:

- IT Help Desk
- Asset Management
- Customer Service
- Facilities Requests
- Work Orders
- Equipment Tracking
- Security Access Requests
- Onboarding
- Self-Service Portal
- Contract Renewals
- Document Management
- HR Requests
- Purchasing Requests
- Employee Request Manager



*Using a pre-built application could save substantial time and effort.*





## IMPLEMENT NEW SOLUTION: *Create solutions that replace InfoPath.*

At this point, you have reviewed the form's functionality and determined the business purpose. You have engaged users and stakeholders and incorporated their feedback. You have considered changes to the business process. You have looked at pre-built, third-party solutions. ***You know what the new solution should have in it.***

*Time to move forward! A typical InfoPath replacement would be similar to this:*

1. Setup a SharePoint site, list(s), and columns to hold the data
2. Install NITRO Studio in that site
3. Create a NITRO Form for the list
4. Add NITRO Workflows and Custom Actions
5. Add other NITRO features as needed  
(print templates, email synch, dashboards, etc.)
6. Test the solution and revise as needed
7. Have end users test it out and revise based on user feedback
8. Test again before going to production
9. Release to production and direct users to the new solution



***Once this form is launched, on to the next one!***



# NITRO Studio, your InfoPath Replacement Solution

NITRO Studio brings you all the features you need for a successful InfoPath replacement project – advanced forms designer, powerful workflow engine, mobile options, integration with email and databases, and much more.

With the capabilities of NITRO Studio, you will be able to build solutions that replicate, as well as enhance, the functionality of InfoPath Forms.

***The time to get started is now!***

## AVAILABLE IN:

SharePoint 2013,  
2016, 2019, & SE

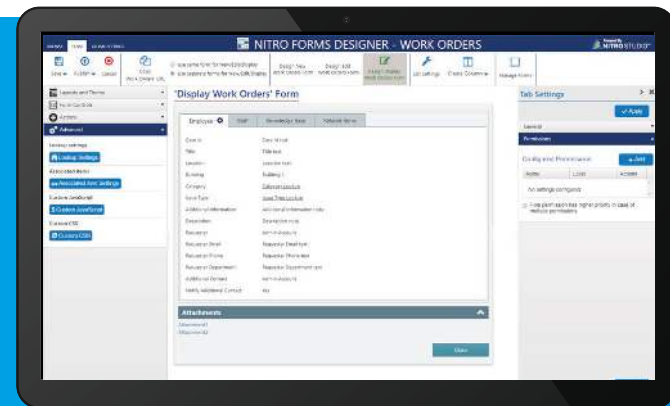
Office 365

Modern or  
Classic UI



- Easy to use
- Low cost
- Comprehensive

***Trial available | Training available***





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## Helping businesses succeed with Office 365 & SharePoint!



### **BUSINESS APPLICATIONS**

Innovative **out-of-the-box** solutions



### **NITRO STUDIO™**

No-code business process automation



### **CUSTOM SOLUTIONS**

Tailored to your needs



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Advanced features that power productivity

**CROW CANYON SOFTWARE** delivers the power of a connected, digital workplace to your organization, turning SharePoint and Office 365 into truly useful and practical tools that solve real business automation problems.

Over 5,000 customers worldwide, including major financial institutions, government agencies, corporations, military units, colleges, healthcare companies, and beyond, already benefit from our powerful and flexible business applications as well as the custom projects Crow Canyon has done.

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