



# Transitioning from InfoPath to **Nintex**

This white paper provides information about the benefits of using Nintex as the forms and workflow solution for your organization. It also contains effective concepts and practical guidelines for transitioning existing forms to Nintex.



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# Why Nintex?

## Nintex Platform

Nintex provides a comprehensive and integrated workflow platform that enables you to easily automate processes.

Build complete business process applications when you combine Nintex Forms and Nintex Workflow. When integrated with Nintex Workflow, Nintex Forms automatically generates workflow forms that can be customized quickly, turning traditional workflows into sophisticated business applications.

Form designers can create task forms that let users approve, review, and track information submitted via those forms. Each task form can contain process background and status information so that all the information needed to make decisions is in one place. Designers can also edit and design workflow start forms that collect and display data before starting a workflow process.



### **ADVANCED WORKFLOW**

Automate business processes quickly and easily



### **MOBILE FORMS**

Create, publish and deploy forms anywhere



### **MOBILE APPS**

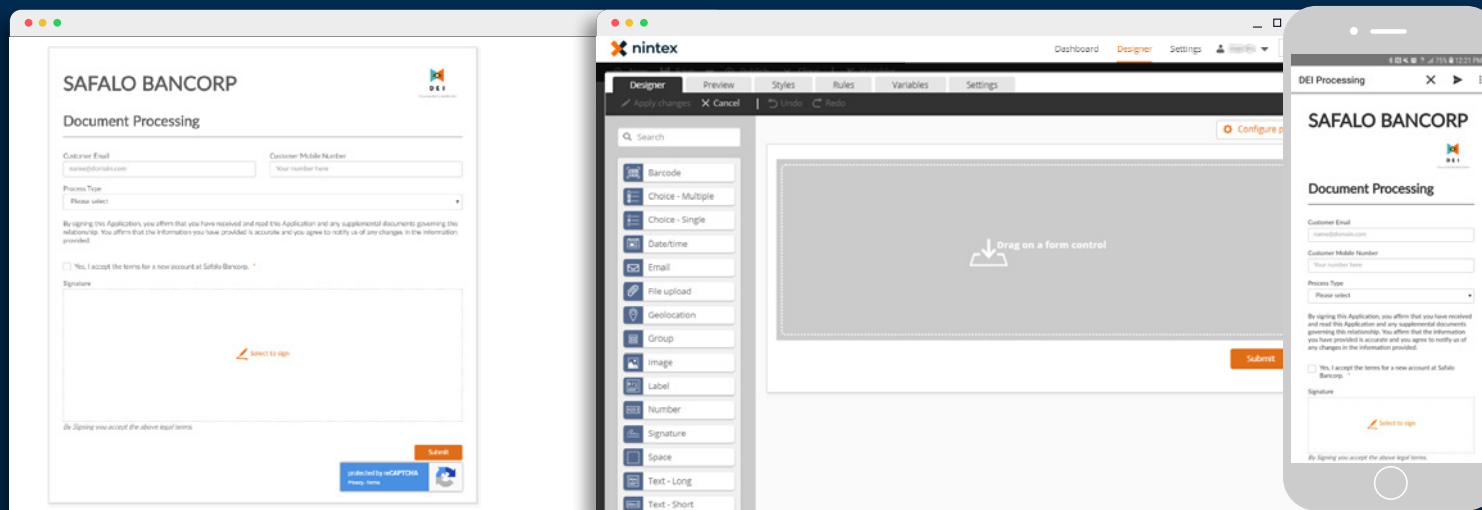
Give people the ability to work anywhere, anytime, on any device



### **XTENSIONS™ FRAMEWORK**

Connect to the cloud for content collaboration





## Nintex Forms

Nintex Forms is a browser-based forms designer that lets you quickly and easily create forms within SharePoint or Office 365. Create simple, responsive forms with very little effort, or create complex and logic-driven forms with advanced rules and business logic. Run Nintex Forms on Android and iOS, giving you online or offline mobile access. Nintex Forms also integrates seamlessly with Nintex Workflow to automate business processes and deliver rich SharePoint applications.



## Easy to use

Designers can quickly and easily create forms with just the click of a button. Controls can be effortlessly moved around and reorganized within the form with the drag-and-drop functionality. Nintex Forms gives novice users the ability to create simple forms, while experienced developers can create complex forms.



## Forms on the go

With Nintex, you're just one click away from putting all your work in your pocket. With Nintex Mobile and Apps Studio, you can do your job wherever work takes you.

- › Capture data
- › Submit requests
- › Start processes
- › Complete tasks
- › Review content
- › Approve documents
- › Brand and create custom apps



# Building forms-driven workflow solutions

As organizations move to a data-centric and process-centric approach, forms and workflows naturally become joined at the hip.

To realize the full benefits of forms in any organization, workflow solutions are essential. The goal of a workflow solution is to automate processes between people and content.

Three important factors should be considered when building a workflow solution:

## PEOPLE

Increased collaboration is imperative. Your workforce is distributed and mobile. They expect to be able to work from any device and expect that forms will be user friendly and engaging.

## PROCESSES

Time-consuming everyday processes should be automated, resulting in streamlined workflows.

## CONTENT

Processes need to be connected to all your content – whether in the cloud or on-premises.

## NINTEX PLATFORM



ADVANCED  
WORKFLOW



MOBILE  
FORMS

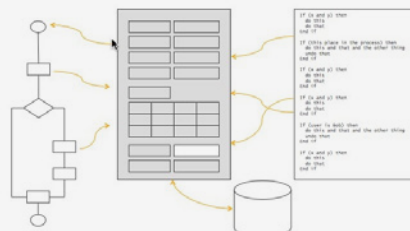


MOBILE  
APPS

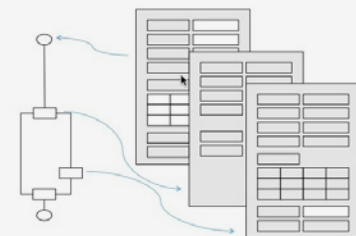


XTENSIONS™  
FRAMEWORK

## WHAT A FORM SHOULDN'T DO



## WHAT DOES NINTEX DO?



To learn more, [download our white paper](#)  
“[Building Forms-Driven Workflow Solutions.](#)”

# Familiar forms designer



In order to be able to select the right tool, you need to understand the similarities and differences between Nintex Forms and InfoPath. Nintex Forms offers many features that form designers have come to know and trust. Users will be able to quickly grasp familiar features to design effective forms. Some of these include:

## **Drag and drop**

Designers can use the drag-and-drop form designer to instantly create forms without having to write custom code.

## **View/Fill out in browser**

Users can fill in the form directly online within their web browser.

## **Rules**

Build rules on a form control to dynamically add formatting, visibility, or editing changes to controls based on defined conditions. Designers can construct simple or complex rules utilizing Runtime Functions within the built-in Formula Builder.

## **Validation**

Nintex Forms offers built-in or custom functionality to make sure certain data and informational conditions are met before the form is submitted.

## **Access to SharePoint content**

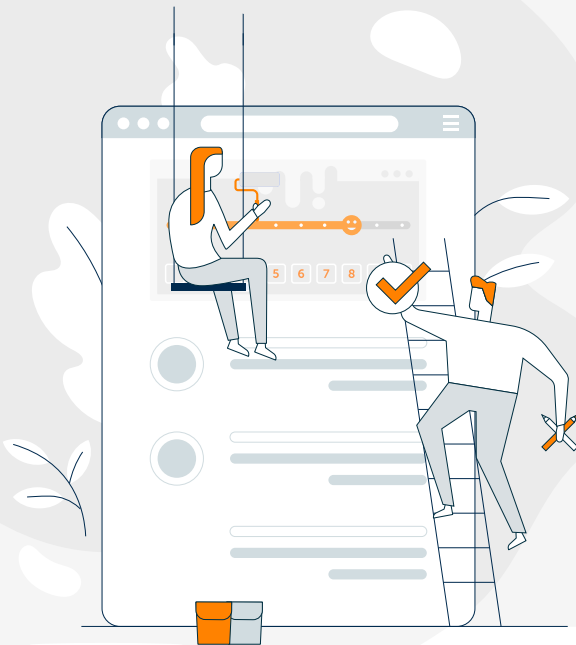
Nintex Forms can connect directly to data within SharePoint lists.

## **Forms with content types**

Designers can customize each form that's attached to a content type in a list or document library.

## **Functionality**

Designers can create interactive forms with dynamic controls, such as List Lookup, Repeating Group, People/Group Picker, and Calculated Value Field.



# What's unique about nintex forms?

Nintex Forms incorporates innovative features and concepts that make it an excellent forms development tool. Former InfoPath users will find significant value in the following Nintex Forms functionality:

## **Mobility** ★

Design forms for multiple device layouts that are accessed and completed on a mobile device.

## **Portability** ★

Use the Import and Export functionality to quickly copy forms with all their settings and layouts from one environment to another.

## **Reusability** ★

Create reusable components and save forms as templates.

## **Preview** ★

View how forms will render in a selected device layout without having to exit the forms designer.

## **Form variables** ★

Utilize hidden values that are calculated at runtime, used in controls and rules, and can be bound to list columns.

## **Built-in functions** ★

Build complex formulas to use in rules and calculated values by utilizing provided inline and runtime functions.

## **Create column** ★

Add a new SharePoint list column and use it immediately without leaving the forms designer.

## **Device functionality** ★

Leverage mobile device technology features to fill out and submit forms, including using touch support and adding photos and attachments directly from a smartphone or tablet.

## **Controls** ★

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

## **Nintex Mobile and App Studio** ★

Brand, customize, and use your own apps, whether online or offline.

## **Cross browser support** ★

Build forms that work across all browsers.



# Transition guidelines

Taking the time to plan is crucial to the effectiveness and success of your forms strategy. Moving existing forms to a new forms tool requires a clear process that needs to be handled in a precise manner. Review the following guidelines to help you plan a smooth and effective transition of your existing forms to Nintex.

## Best Practices

Designers should adhere to certain best practices that improve the efficiency and performance of their forms. Follow these methods and proven techniques throughout the forms conversion process..

### Re-examine processes

Review existing business processes that include the forms component. Many times, a thorough analysis yields a prime opportunity to streamline and improve forms as part of the business process.

### Cleanup data

Make the important decision to audit the existing data used in forms from sources such as sites, lists and libraries. Archive or delete unnecessary data to reduce overhead, improve integrity, eliminate redundancy, and increase load times of the data contained in your forms.

### Simplicity

Often, forms start out with a simple design, but somehow evolve into overly and unnecessarily complicated applications. Ensure that forms are intuitive and easy to complete.

### Design

Your primary goal should be to create a visually appealing form that helps provide a satisfying user experience. Investing the time to map out the form layout, structure, and styling pays significant dividends in the long run. Carefully consider the logical grouping and order of the fields on a form.

### End users

Always account for the end user. Whether they are IT staff, salespeople, corporate users, or external customers, make every effort to meet user expectations. Don't forget to ask for end user feedback and incorporate it throughout the forms development process.

### Testing

Frequently, the test planning and quality assurance aspect of the forms development process is minimized or ignored altogether. Provide ample time for testing, as solid testing helps prevent defects from occurring, facilitates a stable implementation process, and produces a sound technical form. Be sure that the forms are also tested in multiple browsers and on a variety of mobile phones and tablets.





# Identifying candidates

Choosing which forms to convert is not always obvious. Carefully evaluate each form to determine if it meets your criteria for moving to a new forms tool. Selecting the right forms to convert saves time and effort. Use these topics as some of the factors to consider when picking and prioritizing forms to transition to Nintex Forms.



## Business need

Analyze the importance of the form to critical business processes. Determine if existing forms are part of an outdated process, infrequently used, or no longer needed.

## Complexity

Gauge the overall level of complexity of the form. Forms frequently become extremely lengthy and unwieldy over time, but don't need to be. The level of complexity plays a critical role in the amount of effort needed to convert forms to a new technology and maintain them in the future.

## Customizations

Determine the extent of components specifically developed for the form, such as custom code and branding. The feasibility to convert current forms is dictated by the level of customization present.

## Repeatable components

Check to see if reusable elements exist and can be used in the form. Take advantage of the ability for forms to be saved as templates and for modules of code to be saved for reuse.

## Individualization

Assess if different parts of the form are viewed or hidden based upon a user's role in the process.

## Mobility

Evaluate if the form will be accessed by internal users only or by participants outside the organization. Also establish which browsers and devices should be accounted for among the forms user base.

## Data access

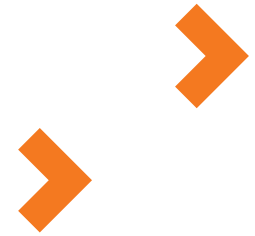
Identify the source of external data and where it is used by form controls. Make sure that the form can access and use the necessary data.

## Workflow based

Decide if the form is a component of a larger process or a self-contained application. Take the opportunity to determine if the form and workflow process would work better separately or together.

# Transition planning checklist

Once you've targeted forms as candidates for conversion, coordinating the transition needs to be thorough and well planned to ensure a successful migration. Be sure to consider the following aspects during your planning.



## ○ Multiple views

Does the form need to have views that are shown or hidden based upon the logged-in user or conditions met within the form?

## ○ Access data within SharePoint

Does the form pull in and use data from SharePoint lists or other data sources in form fields (such as choice and drop-down fields)?

## ○ Rules

What rules are utilized that dictate data, field, and section behaviors based upon selections and conditions in the form? Examples include:

- Read-only fields
- Hide/show fields
- Disabled fields or sections
- Calculated fields
- Alternate field formatting

## ○ Validation

Are certain fields required in the form and data must be entered in them? Should data be verified as a certain format?

## ○ Anonymous or external user submissions

Do users outside of the organization need to submit forms that capture the data internally?

## ○ Mobile layouts

Does the form need to account for multiple layouts that are viewed on desktop browsers, mobile phones and tablets?

## ○ Branding

Are there requirements for branding and look-and-feel changes?

## ○ Panels

Should controls be logically grouped together? Does a label and border need to be displayed around the group?

## ○ Repeating sections

Does the form contain grouped sets of other controls? Should form users be allowed to insert multiple instances (rows) of the set as needed?

## ○ Confirmation / cancellation messages

Does a custom message need to be displayed if a form is successfully submitted or cancelled?

## ○ List column updates

Does adding or updating content in form fields update list column data for the item upon form submission?

## ○ Workflow task forms

Should workflow task forms be customized to collect additional data and have a different visual design?

# Nintex migration scenario


We've learned about the benefits and features of Nintex and guidelines for converting existing InfoPath forms to Nintex Forms. Now let's consider a real-world scenario of a vendor contract approval process. First, we will review an organizational process built with InfoPath. Then, we will examine key features and concepts used to convert the form-driven process into a powerful business application using Nintex Forms and Nintex Workflow.

## Current form background and details

The current vendor contract approval process centers around a legacy InfoPath form. The form encompasses and controls the entire approval process of new vendor contracts within an organization. A new vendor contract is submitted to the organization by filling out the new contract form. This kicks off the vendor contract approval process, which sends the form information to different users (based upon role and organizational level) for review and approval. The contract must be approved by all involved parties before it can be executed, or it's rejected.

The form has been used in production for a significant amount of time. All information about the contract and the process is housed on the form. The actual vendor contract approval process has gone through multiple iterations due to changes in the business. Many approvers that had been part of the process have changed roles or have left the company, so they are no longer involved. Many different developers have made modifications to the form over time based upon logic changes and issue fixes. The organization wishes to update and streamline the entire process by converting to Nintex Forms.





Below are some additional details about the existing vendor contract approval form.



- Form has been edited and updated many times during its lifespan, going from simple and efficient to cumbersome, unwieldy, long, and complex.
- Custom code has been developed and included in many parts of the form over time to add missing functionality and meet changing business requirements.
- Process logic and assigned tasks are handled entirely within the form.
- Rules components are used throughout the form for field visibility, validation and formatting.
- Sections and fields are shown and hidden based on the current user role and the current place in the process.
- Data connections are utilized to access and inject SharePoint and external data into the form.
- Form accessibility is limited to within the company firewall and network so only internal users can interact with the form while logged into the organization's system.
- Promoted fields are configured to transfer data from the form into list columns in a SharePoint forms library.
- Custom branding has been designed and applied to the form that reflects the company look-and-feel standards.
- Changes to the form require extensive testing that frequently involves completing all the previous steps in the process before getting to the desired part of the process to test.
- Errors encountered during the process are not easily troubleshoot
- Current status is noted in the form, but users cannot easily track the advancement of the process.



# Reengineering the process with Nintex Forms and Nintex Workflow

As we discussed previously, choosing to migrate an existing form to Nintex is a good time for companies to reexamine and streamline the business application. In this scenario, the organization now wants to utilize Nintex Forms and Nintex Workflow to rebuild the existing vendor contract approval process. We can take the information and concepts from this white paper to examine and re-architect the application.

Utilizing Nintex Forms with Nintex Workflow, we can reconstruct the process to be more dynamic, efficient, and user friendly. The vendor contract approval process will be separated into a form to collect and display data, and workflows to handle the business logic, task assignments, status updates, and alerts. The following are key features and approaches used to develop the application into a more efficient and streamlined process.





## Nintex Forms Specifications

- Fields can be arranged and grouped effortlessly to present a well-organized and visually appealing form.
- Multiple layouts of the form are designed for use on any device and are now accessible by authenticated or anonymous users outside of the organization.
- Simple branding can be applied with out-of-the-box features, while more complex formatting can be created through advanced rules and business logic.
- SharePoint and other data sources can be incorporated in form field controls, such as cascading drop-down lists, list lookups, and external data columns.
- Rules can be added via the built-in rules builder for field formatting and data validation.
- Calculated value fields can be used to create estimated and integrated values built with inline functions and displayed at runtime.
- Data collected by the form can be stored in workflow variables and passed directly to workflows

## Nintex Workflow Specifications

- Workflow operates the application's process logic based on the data entered, conditions met, and approval choices made.
- Approval process can be designed in a modular fashion by developing different workflows that handle specific segments of the functionality.
- Separate workflows allow for easy troubleshooting because there is no single point of failure and the process can be designed to restart at designated points.
- Workflow handles creating, assigning and tracking tasks throughout the process, which includes reminder and escalation functionality.
- Approvers and workflow participants easily view their individual tasks with the Nintex provided web parts.
- Workflow provides real-time status updates, which allow users to conveniently see the current status at any point during the process.
- Designers create custom notification alerts that are sent upon task assignments and status changes.
- Process provides updates to data in list columns and refreshes values in form fields.
- Workflow variables utilized to store and update data collected from actions during the process.
- Error troubleshooting becomes simpler using the built-in Workflow Status graphical representation view of the workflow and automatic error notifications.
- Changes made to the workflows easily tested due to splitting the process into smaller workflows that perform specific functions.



# Customer Stories: Transitioning from InfoPath to Nintex



“It was an  
easy first win.”

– Scott Glaser, SharePoint Architect,  
Park Nicollet Health Services

Many organizations are treating InfoPath's retirement as an opportunity to explore other forms tools. They want their forms to be more powerful, more customizable and more user-friendly. Here are a couple stories from organizations that have transitioned from InfoPath to Nintex Forms.

## *Nintex is “easier to manage”*

Scott Glaser, SharePoint Architect at Park Nicollet Health Services, says his company had a large InfoPath footprint that it wanted to replace with a new forms tool. One big concern driving the transition – InfoPath let end users build hard-to-support applications that caused headaches for the organization's IT and SharePoint teams.

*“What we liked about Nintex is that it was integrated right inside of SharePoint, where these people were doing their work,” Glaser says. “They could provision these forms – these compelling kinds of custom forms. It would accomplish a lot of what they were trying to do with InfoPath, but it was just cleaner. It was easier to manage. It was part of our infrastructure.”*

As IT teams know, the true driver of tool adoption is its ease of use. Shortly after transitioning to Nintex Forms, Glaser received a request for a simple patient enrollment form. Previously, the development team would have required weeks, if not months, to develop the form. With Nintex Forms, the SharePoint team at Park Nicollet Health Services created the enrollment form in a matter of hours and developers could focus on bigger projects.

*“It was an easy first win,” Glaser says, and one that took place mere weeks after implementing Nintex Forms.*

## *Nintex is faster and more efficient*

Stacie Weffelmeyer, an ECM Analyst with World Wide Technology Inc., appreciates the user interface and drag-and-drop functionality of Nintex Forms. He also likes being able to easily customize the look of a form, and add SharePoint columns right into a form when editing it.

To be considered a success, new technology tools must ultimately save organizations time and money by helping them work more effectively.

*“Nintex helps everyone work much faster and more efficiently,” Weffelmeyer says. “The quicker you can get things done, the more work you can get done and the more things you can get out to the customer.”*



## Summary

Transitioning to a new forms tool requires careful planning and a clear strategy. There are many aspects that need to be considered before actually migrating existing forms over to Nintex Forms. The combination of an easy-to-use designer, mobility options, and advanced functionality makes Nintex Forms the ideal replacement for the retiring InfoPath application.

# About Nintex

Nintex, the trusted global standard for process management and automation, enables both IT and BDMS to more quickly and easily create and manage simple to sophisticated business processes from back to front-office. More than 8,000 customers in 90 countries turn to Nintex's workflow automation platform to drive productivity and accelerate business results. We have the fastest way to build applications, lowest total cost of ownership, and the highest overall satisfaction among our peers.

In 2018, Microsoft awarded Nintex Workflow for Office 365 with Best Overall App and Nintex Forms for Office 365 with Most Business Value. Nintex also won Microsoft Office and SharePoint Application Partner of the Year award.

We welcome the opportunity to discuss your business needs and demonstrate our unique approach to workflow automation. We are happy to offer the following services:

- A business requirements discussion with one of our workflow experts and our partners
- Solution demos and proof of concepts tailored to your requirements
- A comprehensive response to your RFI/RFP
- Customer testimonials

Learn more at [www.nintex.com](http://www.nintex.com)