Using NITRO Studio to move off InfoPath

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InfoPath Replacement
NITRO STUDIO™

THE TIME IS NOW!
"If you're using InfoPath as the basis for creating forms in your add-ins, now is the time to start thinking about migrating your forms to other solutions."
- Microsoft, April 30, 2018

WHY MOVE OFF INFOPATH?
- Not mobile-friendly
- Old (outdated) look-and-feel
- Clunky technology (XSN, XML files)
- No longer being developed by Microsoft
- Difficulty connecting to other services and data sources (needs coding)

NITRO FORMS – THE INFOPATH REPLACEMENT
NITRO Forms allows you to design and implement custom forms in SharePoint and Office 365. It comes with a WYSIWYG Forms Designer where you can easily create forms using drag-and-drop controls. The Forms Designer has options for tabs, sections, themes, action buttons, scripting, permissions, and many other features that give you the ability to create the forms you need.

NITRO Forms provides a friendly interface for users to create, edit, and view SharePoint list items. The forms do not "inject JavaScript" when a standard SharePoint form loads, as many forms "solutions" do. Instead, NITRO uses the latest CSS and HTML to allow a high degree of flexibility and control of the display. NITRO Forms also only loads the data needed, not the full SharePoint item contents, thereby accelerating load time and performance.

NITRO Forms can connect with data sources in or out of SharePoint. The forms can link associated items, implement cascading lookups, allow multiple forms on one list, and much more. The Forms tool comes from Crow Canyon's nearly one dozen years building applications on top of SharePoint and Office 365. It is a low-cost, easy-to-implement solution for replacing InfoPath forms.

Move off InfoPath to modern, rich, and mobile-friendly NITRO Forms. NITRO Forms is part of NITRO Studio, Crow Canyon Software's suite of apps that enhance SharePoint and Office 365. NITRO Studio gives you the power to easily create the applications you need.

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CASE STUDY
HONUSERVICES

ALOHA NITRO, GOODBYE INFOPATH!

Based in the tropical paradise of Hawai'i, with its gorgeous weather and beautiful oceans, Honu Services delivers business expertise, back office support, and strategic development to more than a dozen small businesses and government agencies on the islands.

One important part of Honu's work is helping its clients run their operations more efficiently. Honu saw it could use SharePoint and Office 365, Microsoft's premier collaboration platforms, to automate and streamline core business processes, such as HR, Accounting, and IT, for its clients.

Honu searched for a SharePoint-based forms and workflow solution that was dynamic. The solution needed to reproduce applications across the different clients. It had to without coding. And it had to be able to handle multiple and complex workflows.

First, Honu tried Microsoft InfoPath and SharePoint Designer. But Honu's normally blue came to creating forms and workflows with those tools. Honu soon realized it needed customization capabilities in order to meet its clients' needs. Plus InfoPath had an expire

In their quest for the right solution, Honu Services began looking at Nintex and a few of they went that route, they had the good fortune to run across Crow Canyon Software's much more affordable NITRO Studio.

Honu found that NITRO Studio, Crow Canyon's application creation solution for SharePoint and Office 365, was able to easily meet and exceed all of their requirements and then some.

"Our demands were high and Crow Canyon's NITRO Studio met and exceeded all our requirements and provided an exceptional solution to replacing InfoPath at a very low cost." - Joy Tsuda, SharePoint Developer, Honu Services

Honu Services originally reached out to Crow Canyon for its out-of-the-box and ready-to-use IT Help Desk application, which Honu installed in its SharePoint environment.

"The ease of use and installation of the IT Help Desk encouraged us to look at Crow Canyon's NITRO Studio." - Joy Tsuda

Honu found that NITRO Studio was easy to use, while also being highly flexible and with a deep set of capabilities. It has not just a forms and workflow solution, but a full "application creation" platforms.

"NITRO Studio out-of-box features with little or no-code, provides highly functional SharePoint Solutions that save me and my team a significant amount of time and resources." - Joy Tsuda

NITRO includes a WYSIWYG forms designer, a Workflow Manager, custom actions, a reporting tool, email synchronization, print templates, list formatting, branding, and much more. It works in SharePoint on-premises and Office 365. It has web parts to allow creation of Modern UI pages with enhanced features and functionality. Plus it comes with a Portal option, which allows end users and customers to engage with SharePoint in a very user-friendly interface.

Honu saw all this and more in NITRO, and has been using it to deliver on its promise to promote long-term success at its client companies. Its customers are happy, calling the forms a "great improvement".

Plus, with this powerful tool and a set of NITRO-based solutions, Honu is able to bring on new customers and get them set up quickly, allowing the company to grow and expand its client base with ease.

Seems like Honu and its clients are all saying, "Aloha NITRO, Goodbye InfoPath!"

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Case Study

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Application Creation Platform
for SharePoint & Office 365

- Power up your SharePoint and Office 365.

- Create flexible, easily deployed applications.

- Build applications that meet your specific needs.

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SharePoint Out-of-the-Box

New Team Site   ✎ EDIT LINKS

New Team Site

Get started with your site   REMOVE THIS

Share your site.

Add lists, libraries, and other apps.

What's your style?

Your site. Your brand.

Documents

⊕ new document or drag files here

✓   ▯ Name   Modified   Modified By

There are no documents in this view.

BROWSE   PAGE

crowadmin ⌄

SHARE   SYNC   EDIT

Home
Documents
Recent
Site Contents

✎ EDIT LINKS
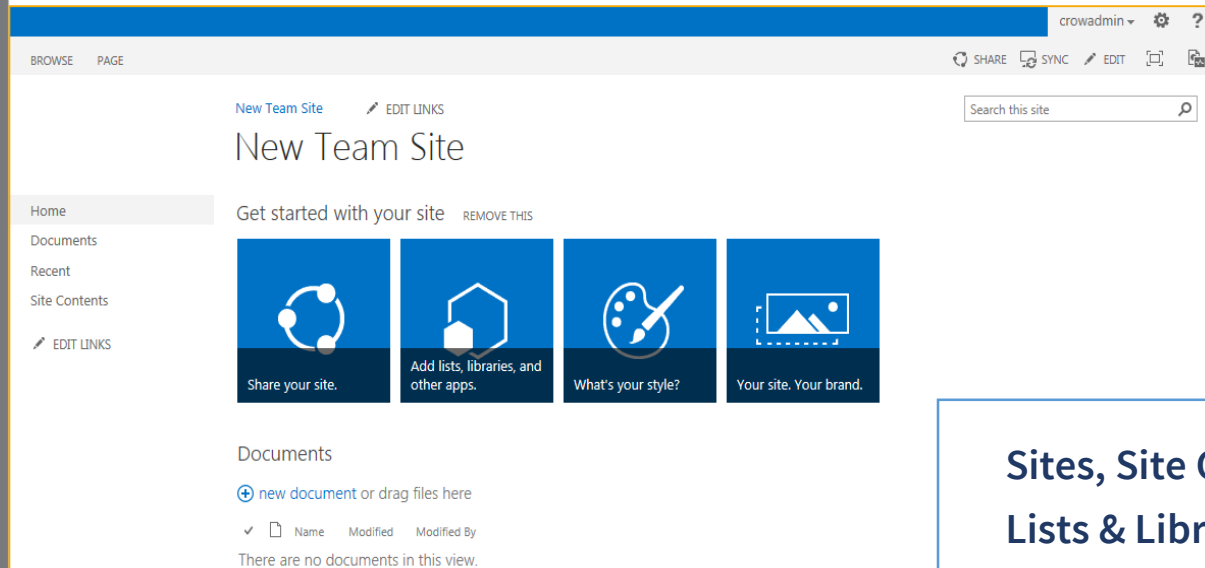
Sites, Site Collections

Lists & Libraries

Columns

Permissions

Integration with AD

Views/Filters on lists

But SharePoint Needs More!
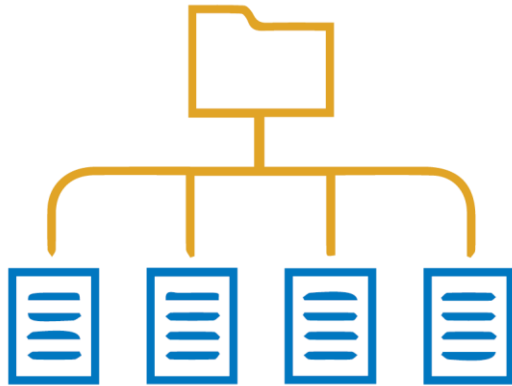
What about:

- Forms?

- Portals?

- Workflows?

- Custom columns?

- Email sync?

- Reporting?

- Database integration?

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Workflows & Processes

Reporting & Analytics

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- Dynamic Forms
- Custom Columns
- Mobile Friendly
- Application Portals
- Branding
- AI Services

STREAMLINE & AUTOMATE PROCESSES

- Workflows & Actions
- Approval Processing
- Alerts & Notifications
- Automatic Routing
- Database Integration
- Email Synchronization

DRIVE CONTINUOUS IMPROVEMENT

- Reports
- Charts & Tables
- Tiles & Dials
- Trend Analysis

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Replacing InfoPath Forms

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-- Microsoft, April 30, 2018

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End of Support for InfoPath

Latest info from Microsoft

InfoPath 2010

Mainstream support has ended
Extended support ends Oct. 2020

InfoPath 2013

Mainstream support ends July 2021
Extended support ends July 2026

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Replacing InfoPath Forms

Why?

1) Not mobile-friendly, lacks responsive design

2) Outdated look-and-feel

3) Does not support the Modern UI

4) Clunky, pre-cloud technology (XSN, XML files),

5) No longer being developed by Microsoft, limited support

6) Limited compatibility with latest browsers (Edge, Chrome)

7) Difficulty connecting to other services and data sources (need coding)

Learn more: www.crowcanyon.com/infopath-replacement/

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Replacing InfoPath Forms

Rule #1: *Stop creating InfoPath forms*

"If you find yourself in a hole, stop digging."

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Replacing InfoPath Forms

Rule #2: *Start Looking for Tools*

- **NITRO Studio**
- **Microsoft PowerApps & Flow**
- **Nintex, K2, and others.**

Each has its advantages and disadvantages.

It is a matter of what you are comfortable with in terms of ease-of-use, feature set, cost, availability of support, and long-term reliability of the company.

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Moving Off InfoPath

1. **Catalog the Forms**: Know what InfoPath forms you have

   - Manual cataloging
   - Automated Tools
     - Metalogix (now Quest) Expert (free)
     - Rencore's SPTransformator (paid for)
     - Other such tools

2. **Refine the Catalog:** fewer forms = less work

   - Should the InfoPath form be
     - archived?
     - updated or rebuilt?
     - simply left behind?

   - Review usage statistics
     Is the form being used? If so, how much?

   Outdated and rarely used forms do not need to replicated.

Moving Off InfoPath

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Archiving InfoPath Data

Our partner, Fusion No-code Solution, can extract InfoPath data and push it to SharePoint lists, or databases.

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InfoPath data extraction

FUSION supports easy No-Code visual setup for extraction of data from InfoPath

With No-Code, Fusion extracts data *from the InfoPath forms (xml files) directly within SharePoint Forms Libraries* and immediately converts the data into SharePoint Lists or Library items for your favorite Forms solution to use (NITRO Studio forms, PowerApps, etc.)

The extraction can run as a one-time job or unattended scheduled for recurrence using incremental operation.

The data can also be pushed into SQL Server or Excel for Power BI or other purposes.

https://docs.nocodesolution.com/fusion/1/en/topic/infopath-data-extraction

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3. *Review the Catalog:* to determine scope of work

Flexibility: How closely do the forms need to be replicated?

- o Regulatory & Compliance Concerns
- o Bureaucracy requiring the form to be a certain way
- o Designed by committee – effort to change design
- o User Training – would users need to be retrained if form changes?

New Features available?
Mobile and cloud offer new opportunities
Database connectivity

Changing needs of the department and end users
Does the existing form still meet their needs?
What can be added/removed/automated?

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Cultural and User Adoption Issues

"The most difficult barrier to moving forward is often the people – not the technology."

"People are going to continue using what they know, especially until the newer tools reach feature and functional parity. That parity, however, often means doing things in a different way – different ways of thinking – so there has to be a lot of education."

- Microsoft MVP Marc Anderson

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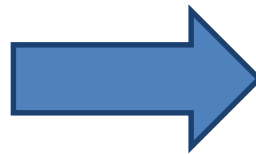
Moving Off InfoPath

By now, you have

Stopped creating InfoPath forms

Started getting familiar with tools to replace InfoPath

And you have a good sense of what needs to be replicated and how much work is involved.

So, how to make the move?

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Moving Off InfoPath

Toe in Water – Experiment with NITRO forms. See what it takes to re-create an InfoPath form with NITRO.

Get a good sense of what can or cannot be done before making any production changes.

Wade in Slowly – Change one or more InfoPath forms to NITRO forms. Put in production, see results.

Adjust as needed going forward. Pay attention to user feedback.

Dive Right in – Best for smaller implementations where the forms and workflows are well understood and the company is ready to move ahead quickly. Work closely with Crow Canyon for migration success.

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Workflows and Actions can trigger a series of events

- Send email notifications and alerts

- Update an item

- Add, copy, move, or delete an item

- Invoke SharePoint workflows or other NITRO workflows and actions

- Invoke Microsoft Flows

- Run a script, web service, or PowerShell command

- Generate Documents from templates

- Generate Printouts and Reports

- Set Permissions on list items

- Query a list to get variables to use in other workflows

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And many other features of NITRO Studio

- Report Center

- Email Integration

- Printing

- Application Portals

- AI Services (Chatbots, NLP)

- Modern UI

- Conditional Formatting

- Branding

- List Search

Thank You for Attending!

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