



ExitNintex

FIELD MANUAL · ENTERPRISE MIGRATION

The Enterprise Nintex Exit Playbook

A delivery manual for migrating large workflow estates off legacy Nintex before the 2026 deadlines.

Phased method, RACI, risk register, cutover runbook and worked example · Reviewed July 2026

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01 How to use this playbook

This is a delivery manual for migrating a large Nintex estate off the retiring SharePoint 2013 workflow engine. It assumes hundreds of workflows, multiple business owners, and a fixed deadline.

Each phase states its objective, the activities involved, the artefacts it produces, and explicit entry and exit criteria. Do not begin a phase before its entry criteria are met — the most common cause of overrun is starting reconstruction before triage and mapping are complete.

Phases 1 to 4 are analysis and cost almost nothing relative to the programme. Phases 5 to 7 are where the budget goes. The purpose of the first four phases is to reduce the volume entering the last three.

02 The forcing function

The schedule is Microsoft-controlled and fixed.

- **31 December 2025** — Nintex Workflow and Forms for Office 365 reached end of support. (Nintex)
- **2 April 2026** — the SharePoint 2013 workflow engine is removed from all existing Microsoft 365 tenants. Dependent workflows fail permanently. (Microsoft)

- **14 July 2026** — SharePoint Server 2016 and 2019 extended support ends, affecting on-premises and hybrid estates. (Microsoft)

On-premises deployments do not stop on these dates, but they move onto an unsupported platform. Nintex's own guidance states that once Microsoft withdraws support, such workflows “become security vulnerabilities and compliance liabilities.”

03 Governing principle: there is no lift-and-shift

The legacy engine and every modern target use fundamentally different execution models. No one-click conversion exists to any platform, including Nintex's own modern products. Content migration tools move lists, libraries, metadata and permissions; **they do not convert workflow logic or forms.**

“The remaining 20% involved complex orchestration: multiple parallel approval branches, custom forms with conditional logic, rich document generation.”

— Akbar Hussain, practitioner essay on migrating enterprise Nintex workflows

Migration accelerators convert simple, linear logic reasonably well. Complex steps typically arrive as placeholders requiring manual completion. Plan on the basis that the simple majority is partly automatable and the complex minority is entirely manual.

The lift-and-shift trap. Reproducing existing workflows exactly looks cheaper because it avoids redesign. In practice it carries years of accumulated technical debt, obsolete business rules, and undocumented workarounds into a platform that was not designed for them — producing a system that is harder to maintain than the one it replaced.

04 Programme setup and roles

A migration of this size fails on governance more often than on technology. Establish these roles before Phase 1.

Role	Responsibility	Time commitment
Programme sponsor	Owns the deadline and the budget; arbitrates when business owners resist retirement decisions.	Low, but must be available for escalation
Migration lead	Owns sequencing, the risk register, and wave planning.	Full time
Platform architect	Owns target design patterns, particularly for long-running processes and integrations.	Full time through Phases 3–6
Workflow developers	Rebuild logic and forms on the target platform.	Scales with volume; the main cost driver
Business process owners	Confirm current process behaviour, approve retirement, and perform UAT.	Intermittent but essential; secure commitments early
Compliance / audit	Confirms audit trail and evidence requirements survive the migration.	Checkpoint-based

Secure business owner time in advance. The most common schedule risk is not development capacity but the availability of the people who understand what a workflow is supposed to do. Book their time before Phase 1, not when you reach UAT.

05 Phase 1 — Discovery and inventory

Objective

Produce a complete, verified catalogue of every workflow and form in the estate, with usage evidence.

Activities

- Run a tenant-wide administrative scan across all site collections, including sites no longer actively used
- Capture workflow name, location, type, author, creation date, last-run date, and run frequency
- Inventory forms separately from workflows — they are frequently missed and are affected by the same retirement
- Identify custom actions, scripts, and web service calls
- Record the business owner for each workflow; where none can be found, that is itself a strong retirement signal

Artefacts

Master inventory register; unowned-workflow list; custom code register.

Entry criteria

Administrative access to the tenant; agreed inventory schema.

Exit criteria

Every site collection scanned; every workflow has a last-run date and a named owner or an explicit "no owner found" marker.

Common failure modes

- Scanning only actively-used sites and missing workflows in archived or departmental collections
- Relying on licence or procurement records rather than a technical scan
- Cataloguing workflows but not forms

06 Phase 2 — Triage and ROT analysis

Objective

Reduce scope by retiring redundant, obsolete and trivial workflows before any effort is spent estimating or rebuilding them.

Why this phase pays for the programme

Retirement is free; migration is not. A meaningful proportion of most mature estates has not run in over a year. Every workflow removed here is removed from every subsequent phase.

Triage rules

Verdict	Criteria
Retire	No execution in 12+ months; or no identifiable business owner; or superseded by another process; or the underlying business activity has ceased.
Consolidate	Functionally near-identical to another workflow — commonly departmental variants of the same approval. Merge before rebuilding.
Replace with platform capability	Simple notification or routing logic achievable with native target-platform features without a custom workflow.
Keep	Genuinely active, business-critical, and not covered by any of the above.

Governance

Retirement decisions require business owner sign-off, recorded and dated. Without it, retired workflows tend to reappear late in the programme as escalations. Where an owner cannot be identified after reasonable effort, apply a documented "notify and retire" rule with a fixed objection window.

Exit criteria

Every workflow has a recorded verdict with owner sign-off or an expired objection window.

07 Phase 3 — Logic auditing and complexity scoring

Objective

Understand what each surviving workflow actually does, and score it so effort can be estimated with confidence.

Scoring model

Score each surviving workflow against the following. The total determines its band.

Attribute	Points	Notes
More than five conditional branches	2	Branch count drives test effort

Parallel or concurrent approval paths	3	Frequently requires redesign on the target
State machine or loop-back behaviour	3	Not natively supported by all targets
Associated custom form with conditional rules	3	Forms are rebuilt, never converted
Custom code, scripts, or custom actions	4	No direct equivalent; requires redevelopment
Document generation from templates	3	Often needs a dedicated capability on the target
External system integration	2 each	Each integration is a separate test surface
Runs longer than 30 days end to end	4	Exceeds Power Automate's hard run limit; requires state-machine design
Regulatory or audit evidence dependency	2	Adds compliance validation to UAT

Band	Score	Interpretation
SIMPLE	0–3	Largely mechanical rebuild; suitable for accelerator tooling with review.
MEDIUM	4–9	Manual rebuild with design decisions; the bulk of most estates.
COMPLEX	10+	Requires architectural input. A minority of workflows that consumes the majority of effort.

08 Phase 4 — Architectural mapping

Objective

Assign each surviving workflow to a target platform and design pattern, against real constraints.

Mapping criteria

Constraint	Decision impact
Maximum process duration	Processes exceeding 30 days cannot run as a single Power Automate cloud flow and need state-machine design or an engine built for long-running work.
Approval lifecycle complexity	Parallel, conditional, and delegated approvals favour a purpose-built process engine.
Data residency and sovereignty	May exclude certain platforms entirely; establish before evaluation, not after.
Maintainer skill profile	Citizen-developer maintenance constrains both platform and permitted design patterns.
Execution volume	High-frequency processes are the ones most exposed to consumption-based pricing.
Integration surface	Existing connector coverage materially affects build effort.

Destination options

Destination	Suits	Requires care with
Microsoft Power Automate	Organisations committed to Microsoft 365; strong native integration; broad connector coverage; a capable and reasonable default for most estates.	A hard 30-day cloud-flow run limit; complex processes tend to fragment across multiple flows; reminders and escalation are achievable but require deliberate design rather than being built in.
Nintex Automation Cloud / K2	Teams with existing Nintex skills; vendor-provided upgrade tooling; least conceptual re-learning.	Licensing structure and caps; forms and complex steps still require redesign.
Specialist BPM (e.g. WEBCON)	Long-running, non-linear, multi-stage approvals; model-driven state machines.	New vendor relationship, tooling and learning curve.
SharePoint-resident (e.g. Crow Canyon NITRO)	Strict data-residency requirements; keeps data within the existing tenant boundary.	Narrower best-fit; evaluate against non-SharePoint requirements.

A split target is legitimate. Sending the simple majority to one platform and long-running or highly complex processes to an engine designed for them is often cheaper and more maintainable than forcing everything onto a single target. Weigh that against the governance cost of running two platforms.

09 Phase 5 — Core data migration

Objective

Move lists, libraries, metadata and permissions to the target environment.

This phase is well served by mature content migration tooling and is generally the most predictable part of the programme. Its principal risk is misunderstanding what it delivers: **it moves data, not logic**. Schedule it so that content lands before reconstruction begins, and validate permissions explicitly — permission fidelity is the most common defect.

Exit criteria

Content reconciliation complete; permissions verified against source; metadata integrity confirmed.

10 Phase 6 — Workflow reconstruction

Objective

Rebuild workflow logic and forms on the target platform, optimised for that platform rather than replicating the legacy shape.

Sequencing within the phase

1. **Build the patterns first.** Establish reusable design patterns for approval, escalation, long-running state, and error handling before building individual workflows. This is the highest-leverage decision in the phase.
2. **Pilot with a representative medium-complexity workflow** to calibrate effort estimates against reality.
3. **Batch by similarity**, not by department — similar workflows built consecutively are substantially faster.
4. **Leave the complex minority until patterns are proven**, but do not leave them to the end of the schedule.

Standards to fix before building at volume

- Naming conventions and solution structure
- Environment strategy: development, test, production separation
- Error handling and failure alerting — legacy workflows frequently failed silently; do not reproduce that
- Logging sufficient to satisfy audit requirements
- Connection and credential ownership: service accounts rather than individuals

Connection ownership matters. Workflows built against an individual's credentials break when that person changes role or leaves. Establish service-account ownership as a standard before volume build, not as a remediation exercise afterwards.

11 Phase 7 — Test, validate and train

Test layers

Layer	Purpose	Owner
Unit	Each branch and condition behaves as designed.	Developer
Integration	External calls, connectors and data writes function end to end.	Developer / architect
Regression	Target behaviour matches documented legacy behaviour, including edge cases.	Migration lead
User acceptance	The process works for the people who run it daily.	Business process owner
Compliance	Audit trail and evidence requirements are satisfied.	Compliance / audit
Load	High-volume processes perform acceptably at peak.	Architect

Training

Train three distinct audiences: end users on the new interface, process owners on the new administration model, and platform administrators on governance and support. Underinvesting in the third produces a support burden that persists long after cutover.

12 Cutover and rollback runbook

Cutover pattern

Migrate in waves by business area. For each wave:

1. Freeze changes to the legacy workflow
2. Stop new instances on the legacy platform from an announced cut-off date
3. Allow existing in-flight instances to drain, with a defined maximum drain period
4. Run old and new in parallel for a defined observation window
5. Validate against wave exit criteria
6. Decommission the legacy workflow and archive its definition for audit

Rollback triggers

Define these before cutover, not during an incident. Typical triggers: failure rate above an agreed threshold; any data-integrity defect; any compliance evidence gap; approval routing errors reaching external parties.

Rollback constraint

Rollback has an expiry date. Reverting to the legacy engine is only possible until 2 April 2026. After that date there is no rollback target. Waves scheduled close to the deadline must be treated as one-way and tested

accordingly.

13 Risk register

Risk	Likelihood	Impact	Mitigation
Scope larger than assumed after full inventory	High	High	Complete Phase 1 before committing to a schedule; treat pre-inventory estimates as provisional.
Business owners unavailable for UAT	High	High	Secure named commitments during Phase 1; escalate through the sponsor.
Complex minority underestimated	High	High	Pilot a complex workflow early to calibrate; hold contingency specifically for this band.
Long-running approvals exceed target platform limits	Medium	High	Identify in Phase 3 scoring; design state-machine pattern before volume build.
In-flight instances stranded at the deadline	Medium	High	Set an early cut-off for new legacy instances; monitor drain-down weekly.
Audit evidence gap at cutover	Medium	High	Involve compliance from Phase 1; make evidence a wave exit criterion.
Licensing cost higher than modelled at real volume	Medium	Medium	Model three years at actual execution volumes including overages before selection.
Retired workflows re-escalated late	Medium	Low	Recorded, dated owner sign-off on every retirement decision.

14 Handling the hard parts

Long-running approvals

Power Automate cloud flows have a hard maximum run duration of 30 days, and approval steps are bound by that window. Legacy Nintex workflows could remain open far longer. (Microsoft — Power Automate limits)

The established pattern is a state machine: persist process state to a SharePoint list or Dataverse table, and use separate scheduled or triggered flows to advance the process. This is reliable and well documented, but it is professional-developer work, not citizen-developer configuration. Budget for it explicitly where Phase 3 scoring flagged processes exceeding 30 days.

Reminders and escalation

Reminder and escalation logic is fully achievable on modern platforms — typically through scheduled flows evaluating outstanding items against elapsed time. The distinction from legacy Nintex is that it is designed and built rather than configured as a built-in behaviour. Treat it as a reusable pattern built once, not as a per-workflow effort.

Fragmentation at scale

“Power Automate's biggest structural weakness at enterprise scale is fragmentation.”

— Akbar Hussain, practitioner essay

Complex processes tend to decompose into multiple flows, which raises governance and traceability costs. Mitigate with strict naming conventions, solution-based packaging, a documented flow map per business process, and centralised error alerting.

Forms

Nintex Forms for Office 365 depends on the SharePoint Add-In model that Microsoft is retiring, so forms are affected on the same timeline as workflows. Forms are rebuilt on the target's form technology, never converted. Capture layout, validation rules, conditional visibility, and any embedded logic during Phase 3 — undocumented form rules are a frequent source of UAT failures.

Document generation

Template-driven document generation rarely has a like-for-like equivalent. Decide early whether to adopt a dedicated document-generation capability on the target or to redesign the output. This is a procurement decision as much as a technical one, so start it early.

Governance of citizen development

Modern platforms make it easy for business users to build workflows without oversight, which over time recreates the ungoverned estate you are currently migrating away from. Establish environment strategy, DLP policies, and a review process before the platform is opened to general use.

15 Worked example: a 480-workflow estate

An illustrative estate, showing how the phases compound.

Stage	Count	Effect
Raw inventory	480	Full tenant scan, including archived site collections.
After ROT triage	300	180 retired — no run in 12+ months, no owner, or superseded. Scope reduced 37% at effectively no cost.
After consolidation	272	28 departmental near-duplicates merged into shared processes.
Complexity split	155 / 82 / 35	Simple / Medium / Complex.

Band	Count	Hours each (mid)	Subtotal
Simple	155	6	930
Medium	82	18	1,476
Complex	35	55	1,925
Rebuild and test	272		4,331
Discovery, mapping, data migration, PM and training (+20%)			+866
Estimated total effort			≈ 5,197 hours

Two observations. First, the 35 complex workflows represent 13% of the surviving count but 44% of rebuild effort — they should be identified early and resourced with senior capability. Second, triage removed roughly 3,000 hours of would-be effort before any development began.

16 Readiness checklist

- ☐ Full tenant inventory complete, including archived sites, forms, and last-run dates
- ☐ Every workflow has a named business owner or a documented "no owner" marker
- ☐ ROT triage complete with recorded, dated owner sign-off
- ☐ Complexity scored; custom code, forms and integrations registered
- ☐ Processes exceeding 30 days identified and a state-machine pattern designed
- ☐ Target platform(s) selected against documented constraints
- ☐ Every surviving workflow mapped to a target and a design pattern
- ☐ Reusable patterns built and proven before volume reconstruction
- ☐ Naming, environment, error-handling and logging standards agreed
- ☐ Service-account ownership established for all connections

- ☐ Compliance sign-off on audit trail and evidence retention
- ☐ Wave plan, cut-off dates and drain-down monitoring in place
- ☐ Rollback triggers defined, with the 2 April 2026 constraint understood
- ☐ Training planned for end users, process owners and administrators
- ☐ Citizen-development governance agreed before general platform access

SOURCES & VERIFICATION

- Microsoft — SharePoint 2013 workflow retirement schedule · support.microsoft.com
- Microsoft — Retirement of SharePoint Add-Ins · learn.microsoft.com
- Microsoft — Power Automate limits & configuration (30-day run limit) · learn.microsoft.com
- Nintex — Microsoft end-of-support guidance · nintex.com
- Nintex — Workflow & Forms for Office 365 end-of-life announcement · community.nintex.com
- Practitioner reporting — [r/sharepoint](#), [r/MicrosoftFlow](#), Power Platform Community, practitioner essays

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