



ExitNintex

TEMPLATE · DISCOVERY & TRIAGE

Workflow Inventory & Readiness Template

Inventory, score and triage every workflow before you migrate — column dictionary, rubrics, decision tree and sample data.

Reusable framework · Reviewed July 2026 · Recreate in Excel or Google Sheets

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01 Why inventory comes first

Discovery and triage is the step most often skipped and most often regretted. You cannot scope, cost, or de-risk a migration you have not inventoried — and a substantial share of most mature estates is redundant, obsolete or trivial, and should be retired rather than migrated.

This template provides the structure: what to capture, how to score it, how to decide its fate, and how to operate the register through the programme. Recreate it in Excel or Google Sheets, one row per workflow, and treat it as the single source of truth for the migration.

02 Column dictionary

Column	What to capture	Example
ID	Unique reference for cross-linking to plans and defects.	WF-0184
Workflow name	As it appears in the platform, unedited.	Invoice Approval v3
Type	Workflow, form, or both.	Workflow + form
Site / location	Site collection, list or library it runs against.	/sites/finance — Invoices
Business area	Owning function, for wave planning.	Finance
Business owner	Named person who signs off retirement and performs UAT.	A. Kumar
Last run date	Primary triage signal. Without it, triage is guesswork.	2026-06-30

Runs per month	Frequency — drives licensing exposure on consumption models.	420
Max duration	Longest observed end-to-end run. Flags the 30-day constraint.	12 days
Custom code?	Scripts, custom actions, or embedded code.	No
Form complexity	None / simple / conditional rules.	Conditional
Integrations	External systems called.	SAP, DocuSign
Doc generation?	Whether it produces documents from templates.	Yes
Audit dependency	Whether history is relied on as regulatory evidence.	Yes — SOX
Failure visibility	Immediate or silent. Silent failures are highest risk.	Silent
Complexity score	From the rubric in section 3.	11
Band	Simple / Medium / Complex.	Complex
ROT verdict	Retire / Consolidate / Replace / Keep.	Keep
Sign-off date	When the owner approved the verdict.	2026-07-14
Target platform	Where it will be rebuilt.	Power Automate
Design pattern	Which reusable pattern applies.	State machine
Wave	Cutover wave assignment.	Wave 2
Status	Not started / building / testing / live / decommissioned.	Building

03 Complexity scoring rubric

Score each surviving workflow by summing every attribute that applies.

Attribute	Points	Why it matters
More than five conditional branches	2	Drives test case count
Parallel or concurrent approval paths	3	Often needs redesign on the target
State machine or loop-back behaviour	3	Not natively supported everywhere
Custom form with conditional rules	3	Forms are rebuilt, never converted
Custom code, scripts or custom actions	4	No direct equivalent; redevelopment
Document generation from templates	3	May need a dedicated capability
Each external integration	2	Separate test surface per integration
End-to-end duration exceeds 30 days	4	Exceeds Power Automate's hard run limit
Regulatory or audit evidence dependency	2	Adds compliance validation to UAT
No documentation of intended behaviour	2	Behaviour must be reverse-engineered

Band	Score	Handling
SIMPLE	0–3	Mechanical rebuild; accelerator tooling with review.
MEDIUM	4–9	Manual rebuild with design decisions.
COMPLEX	10+	Architect involvement required; resource with senior capability.

04 ROT triage decision tree

Apply in order. The first matching rule determines the verdict.

#	Test	Verdict if true
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1	No execution in the last 12 months?	Retire
2	No identifiable business owner after reasonable enquiry?	Retire (after objection window)
3	The underlying business activity no longer exists?	Retire
4	Superseded by another system or process?	Retire
5	Functionally near-identical to another workflow?	Consolidate
6	Logic is a simple notification or routing rule only?	Replace with native capability
7	None of the above apply?	Keep — proceed to scoring and mapping

Record the sign-off. Every Retire and Consolidate verdict needs a dated owner approval, or a documented objection window that expired. Undocumented retirements reliably return as late escalations, at the worst possible point in the schedule.

05 Target mapping rules

Apply after scoring, to assign platform and pattern consistently rather than case by case.

If the workflow...	Then...
Runs longer than 30 days end to end	Requires a state-machine pattern, or an engine designed for long-running processes.
Has parallel or conditional approval routing	Consider a purpose-built process engine; verify the pattern before volume build.
Is subject to data-residency constraints	Restrict to platforms that satisfy the constraint; decide before evaluation.
Will be maintained by citizen developers	Restrict to low-code patterns; avoid designs requiring code to amend.
Executes at very high frequency	Model consumption-based licensing carefully before committing.
Generates documents from templates	Confirm target document-generation capability and licensing early.
Is audit-dependent	Confirm the target's logging satisfies evidence requirements before build.

06 Sample dataset

ID	Workflow	Last run	Runs/mo	Max dur.	Score	Band	ROT	Target
WF-0184	Invoice Approval v3	2026-06-30	420	12 d	11	Complex	Keep	Power Automate
WF-0192	Vendor Onboarding	2026-06-28	35	45 d	14	Complex	Keep	Specialist BPM
WF-0088	Leave Request	2026-06-29	260	3 d	3	Simple	Keep	Power Automate
WF-0091	Leave Request (Sales)	2026-05-10	12	3 d	3	Simple	Consolidate	Merge to WF-0088
WF-0033	Holiday Form 2019	2021-01-04	0	—	2	Simple	Retire	—
WF-0140	Policy Attestation	2026-06-01	1	21 d	8	Medium	Keep	Power Automate
WF-0201	Contract Renewal Alert	2026-06-27	90	1 d	2	Simple	Replace	Native reminder
WF-0117	Offer Letter Generation	2026-06-20	18	5 d	12	Complex	Keep	Power Automate + doc gen
WF-0064	IT Access Request	2026-06-30	310	4 d	7	Medium	Keep	Power Automate
WF-0075	Archived Site Notifier	2022-08-11	0	—	1	Simple	Retire	—

07 Blank template

[illegible]

08 Operating it in Excel or Sheets

- **Freeze the header row** and apply a filter across all columns.
- **Sort by Last run date ascending** — retirement candidates surface immediately at the top.
- **Conditional formatting** on Band: green for Simple, amber for Medium, red for Complex.
- **Data validation** on ROT verdict, Band, Target and Status so values stay consistent.
- **Pivot by Band × Business area** to produce the effort estimate and wave plan directly from the register.
- **Flag Max duration > 30 days** with a formula — this is the single most consequential technical constraint.
- **Protect the Sign-off date column** so approvals cannot be edited after the fact.

09 Quality checks

Run these before declaring the inventory complete. Each has caused real programme overruns when missed.

- ☐ Every site collection scanned, including archived and departmental sites
- ☐ Forms inventoried separately from workflows
- ☐ Last-run date populated for every row — no blanks
- ☐ Every row has an owner, or an explicit "no owner found" marker
- ☐ Every Retire and Consolidate verdict has a dated sign-off
- ☐ Max duration recorded for all Keep rows
- ☐ All integrations and custom code registered
- ☐ Audit-dependent workflows flagged and reviewed by compliance
- ☐ Silent-failure workflows identified and prioritised
- ☐ Register reconciled against a second independent scan

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

Deadline dates are set by Microsoft and Nintex and can change — confirm against the primary pages before acting. Effort and cost figures are planning estimates, not guarantees. Pricing drawn from review sites and vendors is reported, not verified.