



ExitNintex

STEP-BY-STEP GUIDE

The Step-by-Step Migration Guide

Eleven steps across four stages, in the order they should actually happen — with owners, criteria and failure modes.

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01 How to use this guide

Eleven steps in the order they should actually happen, across four stages. Each step states its objective, owner, inputs, actions, outputs, entry and exit criteria, the failure modes to watch for, and an indicative duration.

The sequence matters more than the speed. Steps 1 to 5 cost very little and remove work from everything that follows; the temptation to skip ahead to building is the most reliable predictor of overrun.

02 Stage A — Understand your exposure

Step 1 — Confirm which Nintex products you run

Objective	Establish whether the 2026 retirement affects you, and how urgently.
Owner	Platform administrator
Inputs	Tenant administrative access; licence records (as a cross-check only)
Actions	Identify every deployed Nintex product. Workflow and Forms for Office 365 are directly affected; on-premises is time-limited by SharePoint Server lifecycle; Nintex Automation Cloud and K2 are not affected by this schedule.
Outputs	Product exposure statement
Exit criteria	Exposure confirmed by technical scan, not by assumption
Failure modes	Relying on procurement records; overlooking Forms as a separate product; missing a second product in another business unit
Duration	2–3 days

Step 2 — Inventory every workflow and form

Objective	Produce a complete catalogue with usage evidence.
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Owner	Platform administrator with migration lead
Actions	Scan all site collections including archived and departmental sites. Capture name, location, type, owner, last-run date, run frequency, custom code and integrations. Inventory forms separately.
Outputs	Master inventory register
Exit criteria	Every site collection scanned; last-run date present for every item
Failure modes	Scanning only active sites; omitting forms; no last-run data, which makes triage impossible
Duration	1–2 weeks

Step 3 — Map dependencies and business impact

Objective	Understand what fails, how visibly, and with what consequence.
Owner	Migration lead with business process owners
Actions	For each workflow record downstream systems, integrations, document generation, audit-trail reliance, and whether failure would be immediately visible or silent.
Outputs	Dependency map; impact ranking
Exit criteria	Silent-failure processes explicitly flagged
Failure modes	Treating technical complexity as a proxy for business impact — they are unrelated
Duration	1–2 weeks

03 Stage B — Reduce the scope

Step 4 — Triage: retire, consolidate or keep

Objective	Remove work from the programme before it is estimated or built.
Owner	Migration lead; business owners sign off
Actions	Apply triage rules: retire if no run in 12+ months, no owner, or superseded; consolidate near-duplicates; replace trivial logic with native platform capability; keep the rest.
Outputs	Triage register with dated sign-off
Exit criteria	Every workflow has a verdict and an owner signature or expired objection window
Failure modes	Migrating everything because retirement conversations are uncomfortable; unrecorded decisions that resurface as late escalations
Duration	2 weeks

This is the highest-value step in the entire programme. It is the only one that reduces cost, timeline and risk simultaneously, and it requires no development capacity.

Step 5 — Score complexity

Objective	Band every survivor so effort can be estimated with confidence.
Owner	Platform architect
Actions	Score branches, parallel paths, state machines, forms, custom code, document generation, integrations, run duration and audit dependency. Band as Simple, Medium or Complex.
Outputs	Scored register; complex-workflow shortlist
Exit criteria	Every survivor banded; processes exceeding 30 days flagged
Failure modes	Scoring from workflow names rather than definitions; missing embedded form logic
Duration	2–3 weeks

04 Stage C — Decide the destination

Step 6 — Select target platform(s)

Objective	Choose against documented requirements rather than vendor narrative.
Owner	Platform architect with sponsor

Actions	Score every candidate — including staying within Nintex's modern products — against maximum process duration, pricing at real volume including overages, data residency, maintainer skill profile, integration coverage, total rebuild effort, and exit cost.
Outputs	Selection decision with recorded rationale
Exit criteria	Decision signed off; licensing modelled over three years at real volumes
Failure modes	Selecting before complexity is known; modelling licensing at list price rather than actual execution volume
Duration	3–4 weeks

Step 7 — Map each workflow to a target and pattern

Objective	Decide where and how each survivor will be rebuilt.
Owner	Platform architect
Actions	Assign platform and design pattern per workflow. Route long-running and non-linear processes to state-machine designs or a purpose-built engine.
Outputs	Mapping sheet; pattern catalogue
Exit criteria	No workflow unmapped; every 30-day-plus process has a documented pattern
Failure modes	Forcing every process onto one platform regardless of fit
Duration	2 weeks

05 Stage D — Build, test and cut over

Step 8 — Migrate content

Objective	Move lists, libraries, metadata and permissions.
Owner	Migration engineer
Actions	Use established content migration tooling. Reconcile item counts; verify permissions explicitly.
Exit criteria	Content reconciled; permissions verified; metadata integrity confirmed
Failure modes	Assuming content tooling also migrates workflow logic — it does not
Duration	1–3 weeks, largely parallelisable

Step 9 — Build patterns, then rebuild at volume

Objective	Rebuild logic and forms efficiently and consistently.
Owner	Workflow developers with architect
Actions	Build and prove reusable patterns for approval, escalation, long-running state and error handling. Pilot one medium-complexity workflow to calibrate estimates. Then batch by similarity.
Exit criteria	Patterns proven before volume build; standards for naming, environments, logging and service accounts agreed
Failure modes	Building workflow-by-workflow with no shared patterns; connections owned by individuals rather than service accounts
Duration	The bulk of the programme

Step 10 — Test across all layers

Objective	Confirm correctness, performance and compliance before cutover.
Owner	Migration lead; business owners for UAT
Actions	Unit, integration, regression, user acceptance, compliance and load testing. Train end users, process owners and administrators.
Exit criteria	UAT signed off per wave; compliance evidence confirmed
Failure modes	UAT delayed by business owner availability; audit evidence checked only after cutover
Duration	Runs alongside Step 9, per wave

Step 11 — Cut over in waves and decommission

Objective	Transition to the target with no loss of service.
Owner	Migration lead
Actions	Per wave: freeze legacy changes, stop new legacy instances from an announced cut-off, drain in-flight instances, run in parallel for an observation window, validate, then decommission and archive the definition.
Exit criteria	Wave exit criteria met; legacy definitions archived for audit
Failure modes	Leaving in-flight instances to expire at the deadline; no defined rollback triggers
Duration	Final phase, per wave

Rollback expires on 2 April 2026. Reverting to the legacy engine is possible only until removal. Waves scheduled close to that date are effectively one-way and should be tested on that basis.

06 Timeline at a glance

Window	Steps	Outcome
Weeks 1–4	1–3 · Understand exposure	Verified inventory and impact ranking
Weeks 5–8	4–5 · Reduce scope	Scope cut; survivors scored and banded
Weeks 9–14	6–7 · Decide destination	Platform selected; every workflow mapped
Weeks 15+	8–11 · Build, test, cut over	Rebuilt, tested, migrated in waves

Indicative for a large estate from a standing start. Compress where work is already underway, but preserve the order.

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.