



ExitLegacyWorkflow

QUICK REFERENCE

The Step-by-Step InfoPath Migration Guide

From an active InfoPath estate to a clean cutover: the sequence in order, with the trap to avoid at each step.

A sourced quick reference, reviewed August 2026

01 The sequence

- 01 **Inventory every form.** List every InfoPath form across every site and library, with its owner and last real use.
- 02 **Triage ruthlessly.** Retire forms with no recent submissions before you spend a single hour rebuilding them.
- 03 **Score complexity.** Flag which forms have conditional logic, multiple sections, or external data connections.
- 04 **Pick a target per form.** Simple forms to Microsoft Forms or list forms; complex forms to Power Apps.
- 05 **Rebuild, do not convert.** There is no automated tool; recreate the layout and rules by hand.
- 06 **Rebuild the logic separately.** Recreate routing and rules as Power Automate flows alongside the new form.
- 07 **Preserve existing data.** Export or archive already-submitted records before Forms Services is removed.
- 08 **Test with real users, then cut over.** Validate each rebuilt form before the July 14, 2026 date.

The trap to avoid: treating this as a lift-and-shift. Every form is rebuilt; budget the project on that basis, not on a converter that does not exist.