

# InfoPath Migration Readiness

## A Strategic Checklist for Microsoft 365 Modernization

InfoPath 2013 has reached its end-of-life cycle. To maintain operational continuity and security, organizations must transition to Power Apps and Power Automate. Use this checklist to audit your current form environment and prepare for a modern architecture.

### Phase 1: Discovery & Inventory

- Environment Audit**  
Locate all .xsn files across SharePoint On-Premise (2013/2016/2019) and SharePoint Online.
- Usage Analysis**  
Identify forms with active submissions in the last 6 months. Target low-usage forms for decommissioning.
- Complexity Mapping**  
Categorize forms: Tier 1 (Simple UI), Tier 2 (Complex Rules/Lookups), Tier 3 (Code-behind/External APIs).

### Phase 2: Technical Constraints

- Data Source Mapping**  
Document all connections to SQL Server, Web Services (SOAP/REST), and SharePoint Lists.
- Logic & Code-Behind Review**  
Identify custom C# or VB.NET logic. These must be re-architected as Power Automate flows or Power FX.
- Attachment Strategy**  
Determine if legacy attachments stay in SharePoint Libraries or migrate to Dataverse file columns.

#### CONSULTANT STRATEGY:

Do not simply "lift and shift." Use the migration as an opportunity to modernize data structures using Dataverse and implement HIPAA-compliant security patterns that were not native to InfoPath.

### Phase 3: Target Architecture

- App Type Selection**  
Choose between Canvas Apps (Highly customized UI) and Model-Driven Apps (Data-first architecture).
- Licensing & Compliance Review**  
Verify Power Apps Per User/App licensing and ensure Row-Level Security (RLS) meets regulatory standards.