

FREE
WHITE
PAPER



White Paper:
Using InfoPath?
Nintex is the way
forward for forms.

13405 Folsom Blvd., Suite 501
Folsom, California 95630
(916) 932-7220

Folsom CA | San Francisco CA | St. Louis MO

Microsoft Partner

Gold Collaboration and Content
Silver Application Development
Silver Cloud Productivity

Using InfoPath?

Nintex Is the way forward for forms.

Introduction

At the time Microsoft began their marketing momentum for SharePoint 2013, it also announced the end of InfoPath was on the horizon. Since then, organizations who have invested funding into the use of InfoPath's form tools have been searching for tools to both replace and enhance InfoPath functionality. As of the date of this published article, Microsoft has yet to announce a direct replacement for their web forms development tools. In the third-party market, there are robust forms tools available for purchase that address the need for organizations of all sizes to review in order to understand whether they meet the needs of their organizational goals for providing forms tools with business process automation. Nintex Forms is a strong alternative with its rich functionality for forms and workflow development and presentation. Nintex Forms also offers a robust portability within SharePoint through utilization of its built-in toolset.

Nintex offers these a wide array of solution features for supporting both flavors of SharePoint platforms:

- On Premise
- SharePoint Online

The Nintex development tools are uniquely built into the web browser so the requirement for any client side tools (other than a browser) are greatly diminished. Nintex's built-in platform and device portability means that users are able to complete forms from multiple devices and the forms will display responsively for the detected devices. This ease of use for developers and user interface familiarity for users has made Nintex a very popular choice with organizations as they begin to contemplate "life after InfoPath."

InfoPath

What the [InfoPath](#) announcement from Microsoft immediately means for organizations is that no new features will be added beyond the current 2013 version. Funds were released for the development of InfoPath Forms to streamline their businesses processes to lead to cost savings and higher levels of data accuracy. Most of the requirements for InfoPath forms fell into two broad categories:

To transform existing paper processes into electronic and easy to submit forms.

To enhance existing home grown electronic forms for easier scalability.

InfoPath has proved, over the years, to be a tool widely used for its tight coupling and easy integration into Microsoft SharePoint. Developers and business power users have been able to integrate the forms interface with SharePoint workflows to automate forms submissions and allow for a streamlined process for requests tracking and management (through efficient organization of the SharePoint interface).

Now, with InfoPath's impending "end of life" beginning to move closer, how should organizations look at potentially planning for the future of their existing SharePoint InfoPath-driven processes?

Although the business cases for InfoPath forms run wide and deep, some of the more common usages of the tools include the following:

To run forms submissions through SharePoint Designer or Visual Studio workflows for (1) commonly used tasks (such as approvals) to (2) more complex tasks (such as tracking statuses, item history, displaying comments, and configuring the form and its data for permissions).

- Integrating with SharePoint to provide data displays for the business unit administrators to be able to easily manage the data spawned by the InfoPath forms submissions (depending on the fields being captured in the form, SharePoint's list driven interface make it easy to create many views of the form data to dynamically highlight significant problems in the business processes).
- Use the forms submission data to be able to categorize and analyze the data from a micro and macro perspective (using SharePoint lists or Business Intelligence tools).
- Using data connections to integrate key field values from various external sources into the forms driven processes.

At this time, organizations are moving toward broaching the task of analyzing technologies to support the future of their forms and workflow needs; as such, we thought it would be worthwhile investigating and sharing of the key reasons why Nintex Forms technologies would appear to be a solution worth reviewing for any company that has invested money into InfoPath and will eventually need to replace the tool which, at the time of writing this article, is only looking likely that it will be supported through the SharePoint 2016 lifecycle. To help along the way, the overviews below will help organizations to understand how a forms solution like Nintex can help solve the bulk of the conundrums presented by the phasing out of InfoPath. The overview also points out some of the gaps presented in InfoPath's feature set.

What is Nintex Forms?

Nintex Forms solution is a web-based designer that enables forms to be created within SharePoint quickly and easily

Forms can then be consumed on most common mobile devices from the internet, anywhere and anytime. Nintex Forms integrates seamlessly with Nintex Workflow to automate business processes and deliver rich SharePoint applications.



Primary Benefits for Nintex Forms

Quick and Easy Forms Design

Nintex Forms is intuitive and browser-based, and requires no client software licensing or installation. Design visually appealing forms with sophisticated business logic and rich HTML formatting. Customize predefined layouts for any device, form factor or screen size. Preview forms before publishing to ensure delivery of optimal user experience.

Access Anywhere, Anytime

Nintex Forms provides one-click publishing to Nintex Live, securely extending forms and processes to users outside the firewall. Native mobile applications support offline access and enable capture of touch input, location data, camera photos, video, audio, and more.

Seamless Work

Nintex Forms automatically generates workflow forms that can be quickly customized, turning traditional workflows into sophisticated business applications.

Considerations for moving to another Forms development platform

Mobility

With technology's movement toward offering mobility and a "need it now" mentality, InfoPath's roadmap was never written to address mobile requirements by providing responsive views for users that will detect the device and then display the appropriate user friendly form layout to adapt to the detected device channel. Nintex is a mobile ready platform and with this flexibility in place, users are able to simply focus on completing the form rather than worrying about scrolling left to right to find key fields when using mobile devices. Whichever view of a form you will be presented with, the form is still tied to the original list and, if an in-place workflow is driven by the list items, the automated business process will be triggered.

Solutions Development

For creating Nintex Forms, no tools are required other than a web browser. This key point enables flexibility of developing forms (and workflows) from multiple machines a reality.

New Forms

New form requests in InfoPath need to be assessed and weighed up against pros and cons. Simple forms are easy to create in InfoPath but as the requests gain in complexity, the organization might find these forms more difficult to maintain once the enhancements are made in the knowledge that support for the product will not always be available following the end of life cycle.

Form creations in Nintex are designed to be more simplified and, as mentioned previously, also have the added benefit of the form layout mobility, tight integration with workflow, and also the comfort of knowing product support is there for customers.

Existing Forms

Simple changes (updating fields, typographic changes etc.) can be easily addressed in InfoPath. However, more complex changes will require some heavy design and build work using up development resources.

Updates using Nintex include the benefits referenced in the New Forms section above.

Support

Nintex has a clearly defined roadmap for the future which makes support easier to come by when clients run into issues anywhere along the way. With Nintex currently supporting a large and growing community base of clients, there is a strong community of users on an officially supported [Nintex Community](#) site.

Current InfoPath environment is working well

If your current environment is working well then it's advisable to not only look at today's requirements but also what you might require in the future. Now might be a recommended time for organizations to gather together requests for analysis to study trends from recent requests to help with forecasting future needs. If there are a small number of requests arriving then it's likely an organization will be able to continue working with InfoPath for some time in the foreseeable future. With current technology trends, it's likely that mobile responsive design requests will become one of the biggest requirements for organizations to move their business forward and make the ability to respond to requests immediate. Therefore, InfoPath will lose traction in its feature set to keep up with current organizational technology trends.

What would a transition to Nintex mean for an organization?

Both technologies can exist side-by-side in an environment. Often, when transitioning into a new platform with newer toolsets and features driven more toward enhancing productivity and reducing the amount of time spent in development, there is an opportunity to rethink application designs. With Nintex specializing in forms and workflow (coupled as applications in SharePoint), designers and developers are able to rethink, spend less time building, and offer more features to users as a result of more built-in functionality within Nintex.

Some of these benefits include:

- Richer levels of interaction with users
- Aggregate data from multiple sources
- Enable human intervention that is collaborative across a range of devices

The Key Question – Can Nintex replace forms built with InfoPath?

In many cases the combination of Nintex Forms and Nintex Workflow can provide an alternative to InfoPath. However, organizations push InfoPath far beyond what it was designed for, and in those cases organizations would need to perform in-depth analysis of their current solutions prior to moving them to another platform. The purpose of this would be to ensure any business critical functionality can be created using a new platform. Also, most of the complex InfoPath deployments revolve around customers trying to force too much business/process logic into the form itself. As a result, they end up with complex scripting, or Visual Studio add-ins that can be hard to manage and maintain. Nintex Forms and Workflow engines are tightly integrated but logically separated for very good reasons: you build the process logic into the workflow and the user experience logic into the form. This offers up separation for developers to work with while delivering the robust and expected high standard of user experience.

In Conclusion

No two platforms are alike. Organizations need to review their existing platforms (in particular the custom features) and perform research and to create documentation on the pros and cons of the current technology. The biggest reason to drive articles such as this one is the phasing out of InfoPath. The most worthwhile plus of selecting a product such as Nintex is that new features are constantly rolling out and offering customers the options of using state-of-the-art supported technology to even further streamline the processes. So, while InfoPath to new forms development platforms (such as Nintex) offers no direct migration, there are enough similarities in developing in both technologies that would provide huge benefits for the learning curve of developers and power business users when diving into the technologies Nintex offers. Mobile platforms are supported by Nintex too which has become almost a standard requirement through the speedy momentum gained by “access anywhere” platforms such as SharePoint Online.

If you would like to learn more about how Nintex Forms and Workflow technologies can help you in your organization, contact Malcolm Eaton at Kiefer Consulting at meaton@kieferconsulting.com.