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InfoPath Reality Check(list)

A 10-point checklist to help you modernize your InfoPath forms with the Power Platform

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INTRODUCTION

After July 14, 2026, Microsoft will officially remove InfoPath Forms Services from Microsoft 365/SharePoint Online which means any existing InfoPath solutions in the cloud will no longer function. The InfoPath Forms Service extended support date for SharePoint Server 2016, SharePoint Server 2019 and SharePoint Server Subscription Edition will also end on July 14, 2026. The fact that numerous InfoPath form solutions persist within enterprise organizations has us worried. Many of these solutions are vital for mission-critical operations and migrating them to the Power Platform will require substantial time and resources.

Replacing InfoPath forms with Power Apps can be resource-intensive and requires a well-planned, structured approach to ensure a smooth transition. Leveraging our experience replacing hundreds of InfoPath solutions over the years, we've created a 10-Point InfoPath Reality Check(list) to help you understand the time and resources necessary to transition away from InfoPath with minimal disruption to your business and stakeholders.

INFOPATH REALITY CHECK(LIST)

A step-by-step guide to our recommended InfoPath replacement process.

01

Assessment and Planning

- Identify all existing and business-necessary InfoPath forms
  - Not all legacy forms need to be replaced. Business changes over time and technical solutions should match your current and future needs.
- Evaluate dependencies
- Power Platform Readiness
  - Review and discuss current licensing
  - Identify gaps and provide recommendations
- Assess user needs
- Analyze and streamline automation related to the forms

02

Security

- Define permissions and access controls
- Ensure data security

03

Data Migration

- Analyze existing data
- Develop a data migration strategy
- Verify data integrity

04

Power Apps Development

- Design user interfaces
- Integrate with data sources
- Implement business logic
- Build smarter automations

05

Testing

- Conduct unit testing
- Perform integration testing
- User acceptance testing (UAT)

INFOPATH REALITY CHECK(LIST)

06 User Training and Support

- Develop training materials for Power Apps.
- Conduct training sessions to familiarize users with Power Apps
- Provide ongoing support

07 Deployment

- Develop a deployment plan
- Communicate changes to users
- Monitor deployment

08 Documentation

- Document Power Apps architecture
- Update user manuals
- Maintain change logs

09 Feedback and Iteration

- Collect user feedback
- Iterate based on feedback

10 Ongoing Support

- Establish a support system
- Implement governance policies and controls
- Develop best practice guidelines
- Monitor performance

By following this checklist, you can expedite the process of replacing InfoPath forms with Power Apps while minimizing disruptions and ensuring a successful transition.

METHODOLOGY AND SCHEDULE

Since the Power Platform was launched in 2016, Compass365 has helped organizations successfully modernize hundreds of legacy InfoPath solutions. While no two projects are the same, we've created a typical project plan and schedule to help you understand the amount of work and time replacing InfoPath forms may require.

InfoPath Form Complexity Matrix

Creating a realistic roadmap requires an understanding of the quantity and complexity of the solutions to be replaced. Below is the InfoPath form complexity matrix we use to determine the complexity level of the project.

Component	Low	Medium	High
Screens/views	1	2-3	4+
Form Types			
Custom List Form	✓	✓	✓
Form Library (promoted fields)	X	✓	✓
Form Library (non-promoted fields)	X	X	✓
Data Migration			
SharePoint Lists	1	2-4	5+
InfoPath XML Data Extraction	X	X	✓
SQL Server Database	X	X	✓
Customizations			
Item/Audit History Screen	X	✓	✓
In-Form Approvals	X	X	✓
In-Form Reassignment	X	X	✓

METHODOLOGY AND SCHEDULE

Typical Project Schedule

Based on the solution complexity, we have broken down how many weeks it generally takes to complete each phase of our process.
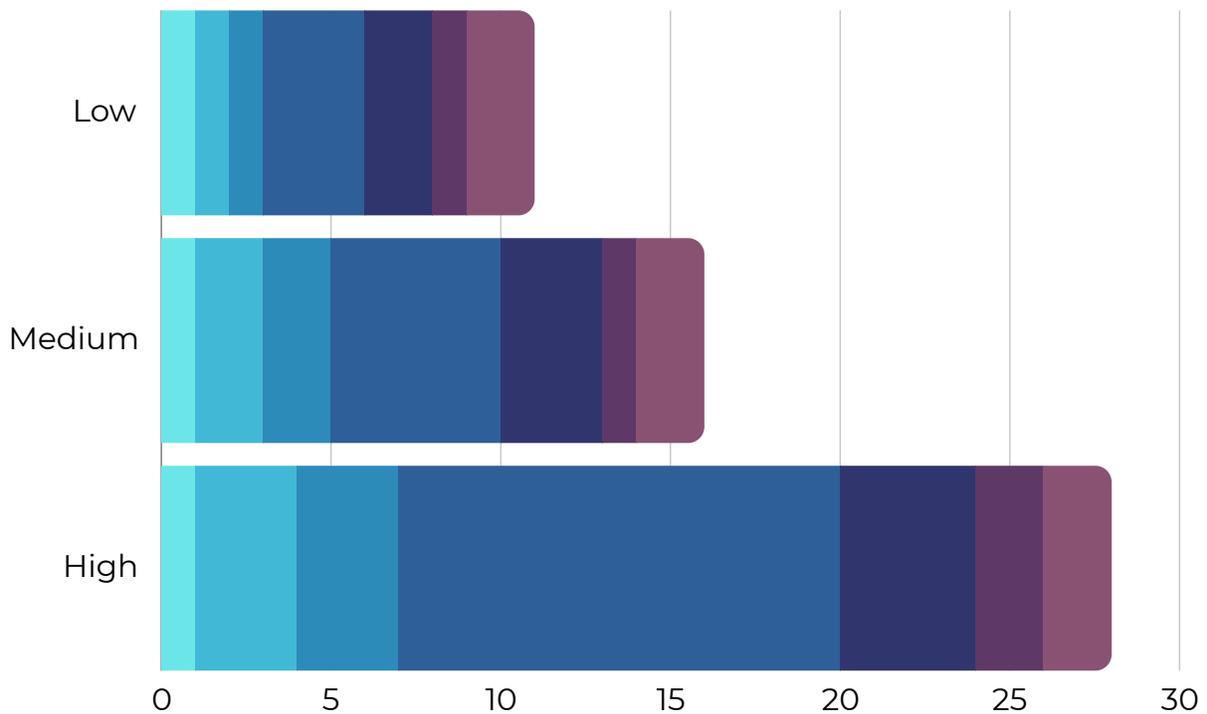
Activity	Details	Weeks to complete based on complexity		
		Low	Medium	High
Kickoff Meeting	• Introductions • Project methodology • Project schedule • Organize Discovery Meetings • Logistics requests	1	1	1
Discovery Meetings	• Deep dive on current solutions • Process re-engineering • Confirm requirements	2	2-3	2-4
Design & Prototyping	• Create preliminary architecture and prototypes	3	4-5	5-7
Implementation	• Create redesigned solution(s) • Provide bi-weekly status reports • Conduct bi-weekly playback meetings	4-6	6-10	8-20
UAT	• Prepare UAT Script • Conduct UAT Kickoff meeting (demonstrating script) • Client testing • Issue Remediation	7-8	11-13	21-24
Production Migration	• Prepare Production Deployment script • Conduct Production Deployment planning meeting • Go-Live	9	14	25-26
Post-Production	• Hypercare support • Conduct Project Review meeting	10-11	15-16	27-28

METHODOLOGY AND SCHEDULE

Do you have time to wait?

At Compass365, we are encouraging all of our customers to tackle their InfoPath Modernization efforts now as we expect heavy demand for resources as the 2026 deadline approaches. When under pressure many of our clients feel cheated of the opportunity to rethink the process, modernize, and properly educate the business. Don't let that happen to you. Start now to discover, plan, and execute your replacement of InfoPath solutions with Power Platform.

Legend: Kickoff Meeting ■ Discovery Meetings ■ Design & Protoyping ■ Implementation ■ UAT ■ Production Migration ■ Post Production

Can you afford to wait?

While it may seem like the simplest option now, continuing to support InfoPath can lead to technical debt and may result in inadequate resources as the deadline approaches.

NEXT STEPS

2026 is fast approaching. Jump start your InfoPath modernization efforts during two complimentary discovery sessions. We'll analyze any in-use legacy InfoPath Forms and provide recommendations for modernization.

01 **Contact Us**

Start by scheduling your complimentary InfoPath Analysis and Recommendations sessions with a Compass 365 Solutions Architect.

02 **InfoPath Analysis Session**

During our first session we will help you run the Modernization Analysis tool, discuss your goals and timeline, and provide an overview of the Power Platform.

03 **InfoPath Recommendations Session**

We will present the analyzed findings including forms, workflows, lists, and libraries selected, demo Power Platform replacement apps, discuss a prioritization approach, and recommend next steps to modernization.

SCHEDULE YOUR COMPLIMENTARY SESSIONS

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