pb powerbunch



SAMPLE

Migration Kit for the Microsoft Power Platform

Record and assess legacy solutions and migrate them systematically to Power Automate, Power Apps, and SharePoint Online

Inventory for 300 solutions | Deprecations with sources | Cutover with acceptance | 9 communication templates

Original pages from the 39-page handbook: Contents, Welcome, the seven-step process, and the SharePoint workflows and Nintex sections from the chapter "Migration targets". Other pages have been omitted. Page numbers refer to the full handbook.

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01

Welcome

Many companies work with solutions that were once a good fit: SharePoint workflows, InfoPath forms, Access databases, and Excel files with macros. In 2026, Microsoft shut down a large proportion of them or ended support for them. Some no longer run at all. Others continue to run, but without security updates.

This kit helps you manage the replacement yourself: Record all legacy solutions, make a reasoned decision about each one, plan the sequence, and complete each cutover without losing anything. It does not build apps or flows. It makes it possible to plan and document the work involved.

I put this kit together from my experience with migrations to the Power Platform. The dates are backed by sources from Microsoft or the respective vendor, and entries without a fixed date are marked. Where something cannot be said with certainty, this is noted. Before making important decisions, check the current status of the linked sources.

Good luck with your project

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Who it is for

IT managers, people responsible for Microsoft 365 or SharePoint, Power Platform teams, and project managers. Business units contribute because only they know what a solution is needed for.

What you need

Excel and Word, access to the legacy solutions or to people who know them. For automated discovery in SharePoint Online, permissions to set up an Entra app.

What you have at the end

A complete inventory, a reasoned decision for each solution, a wave plan with effort estimates, and, for each cutover, a plan, tests, acceptance, and an orderly shutdown.

03

In seven steps

From the initial overview to the shutdown of the legacy solution. Steps 1 to 4 apply to the entire project, while steps 5 to 7 apply to each individual solution.

1	2	3	4	5	6	7
Record	Assess	Determine the target	Plan	Implement and migrate data	Test and accept	Cut over and shut down

1 Record

Inventory workbook, Project and Inventory sheets · Communication templates 1 and 2

Enter all legacy solutions in the Inventory sheet. Sources include Microsoft's tools, a file search, and a survey of the business units (chapter 05). It is better to record too much than too little. Retire anything that is no longer needed in the next step.

2 Assess

Inventory workbook, Inventory and Analysis sheets

For each solution, specify business importance, usage, and complexity. The workbook determines date, status, and urgency from type and version. This results in the risk score, priority, and size (chapter 06).

3 Determine the target

Inventory workbook, Target selection sheet

Five questions lead each solution to one of six courses of action. For rebuilding and migration, the main purpose and data context determine the target technology (chapter 07).

4 Plan

Inventory workbook, Criteria and Wave plan sheets · Migration plan

Enter person-days for each size class, group solutions into waves, and set a timeframe for each wave (chapter 09). Create a migration plan for each solution being migrated.

5 Implement and migrate data

Migration workbook, Features, Field mapping, and Data reconciliation sheets

You build the new solution yourself or with a service provider. The kit records what it must be able to do (Features sheet), how the data is mapped, and whether the migration is correct (chapter 10).

6 Test and accept

Migration workbook, Test cases, Defects, and Acceptance sheets

Derive test cases from the features, run them, and track defects. The Acceptance sheet shows whether the agreed prerequisites are met (chapter 11).

7 Cut over and shut down

Migration workbook, Cutover sheet · Communication templates 3 to 8

Freeze the legacy solution, perform the final data migration on the cutover date, verify the results, and release the new solution. After a period of stable operation, make the archive available, announce the shutdown, and shut down the legacy solution (chapter 12).

08

Migration targets

For each type of legacy solution, the usual target, Microsoft's tools, and what you should watch out for.

SharePoint workflows and SharePoint Designer

TARGET **Power Automate (cloud flows), with Power Automate approvals for approval processes**

Rebuild the processes as cloud flows. Approvals then appear in the Approvals app in Microsoft Teams and in Outlook. Check whether every step is still needed: a rebuild is an opportunity to simplify processes and add error handling.

For simple cases, built-in features are sufficient: Rules in lists and libraries notify individual people or people listed in a Person column (not a group address) when changes occur, and approvals in lists let you approve items without building a separate flow. Before switching, check the limitations of approvals in lists: SharePoint disables sync for the list, and these approvals are not integrated with content approval or "Request sign-off". An approval request does not give the approver access to the item, so grant access separately. If the item is edited or deleted while an approval is in progress, SharePoint cancels the request.

On SharePoint Server, the SharePoint Migration Tool migrates workflows of lists, libraries, and content types to Power Automate, not site workflows: SharePoint 2010 out-of-the-box workflows (Approval, Collect Feedback, Collect Signatures, Three-state) and workflows from SharePoint Designer 2010 and 2013. Definition and association are migrated, but no workflow history and no running instances. If a workflow contains unsupported actions, the migration stops with an error by default. In the settings ("View all settings" and "Handle Unsupported Action"), you specify that such actions become placeholders of type "Compose" instead, which you then rework. The flows must then be turned on and tested like a rebuild.

A single run of a cloud flow lasts at most 30 days, even if it is waiting for an approval. After that, pending steps time out. Longer processes need a stored state, for example in a list or in Dataverse.

> **Caution.** Running workflows with open tasks: decide whether they finish in the legacy solution or are restarted in the new solution. In SharePoint Online, the 2013 workflows have already been shut down.

Sources: [20] Migrate SharePoint Server workflows to Power Automate (Microsoft Learn)
[21] Step 2: Migrate workflows to Power Automate (Microsoft Learn) [28] Approvals in Lists & Document Libraries (Microsoft Support)
[29] Create a rule to automate a list or library (Microsoft Support)
[36] Limits of automated, scheduled, and instant flows (Microsoft Learn)

Nintex

TARGET **Power Automate or a current product from the vendor**

Nintex Workflow for Office 365 no longer runs following the shutdown of SharePoint Add-ins. The vendor had already ended support on December 31, 2025. For Nintex for SharePoint Server, the kit uses the support lifecycle of the server version. Check the vendor's own dates directly with Nintex.

Nintex offers its own successor products. Use the decision tree to decide whether to switch to them or to Power Automate. With Power Automate, expect to rebuild the processes.

Sources: [11] Nintex Workflow for O365 end of support (Nintex Community)

InfoPath forms

TARGET **List form with Power Apps, canvas app, Microsoft Forms, or default form**