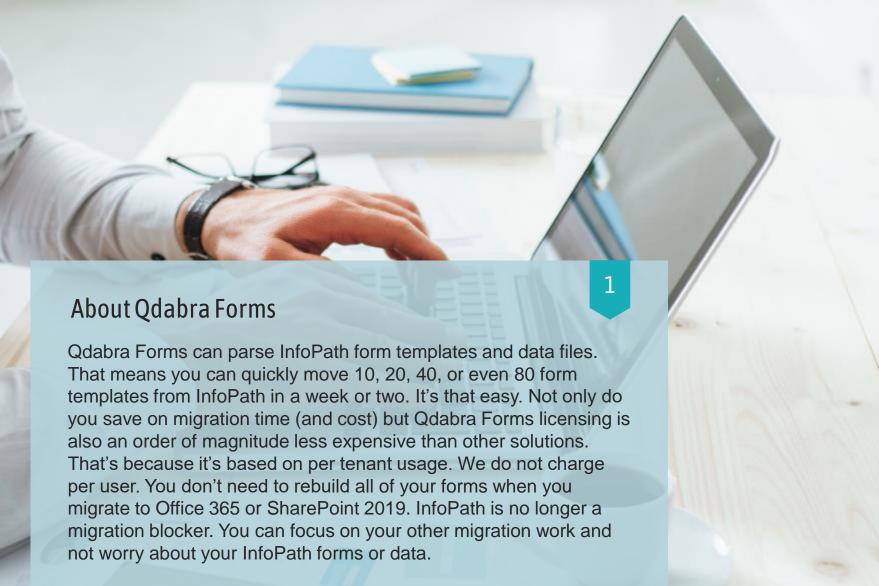# QDABRA*
SOFTWARE®

Take Your InfoPath Forms

TO THE FUTURE

with **minimal** effort
and **maximum** gain

Remove Dependency
To End-of-Life Product

Why Qdabra Forms?

- ☑ Fastest move option
- ☑ Preserve investment
- ☑ Add features
- ☑ Lowest overall cost
- ☑ Qdabra Support

Move InfoPath Forms to Qdabra Forms

- Continue using your InfoPath Forms without InfoPath
- Create a proof-of-concept (POC) to demo feasibility to your team
- Migrate your forms to Office 365 with zero effort

About Qdabra Forms

1

Qdabra Forms can parse InfoPath form templates and data files. That means you can quickly move 10, 20, 40, or even 80 form templates from InfoPath in a week or two. It's that easy. Not only do you save on migration time (and cost) but Qdabra Forms licensing is also an order of magnitude less expensive than other solutions. That's because it's based on per tenant usage. We do not charge per user. You don't need to rebuild all of your forms when you migrate to Office 365 or SharePoint 2019. InfoPath is no longer a migration blocker. You can focus on your other migration work and not worry about your InfoPath forms or data.

What Qdabra Forms can give you..

Make Your Sharepoint Forms Shine!
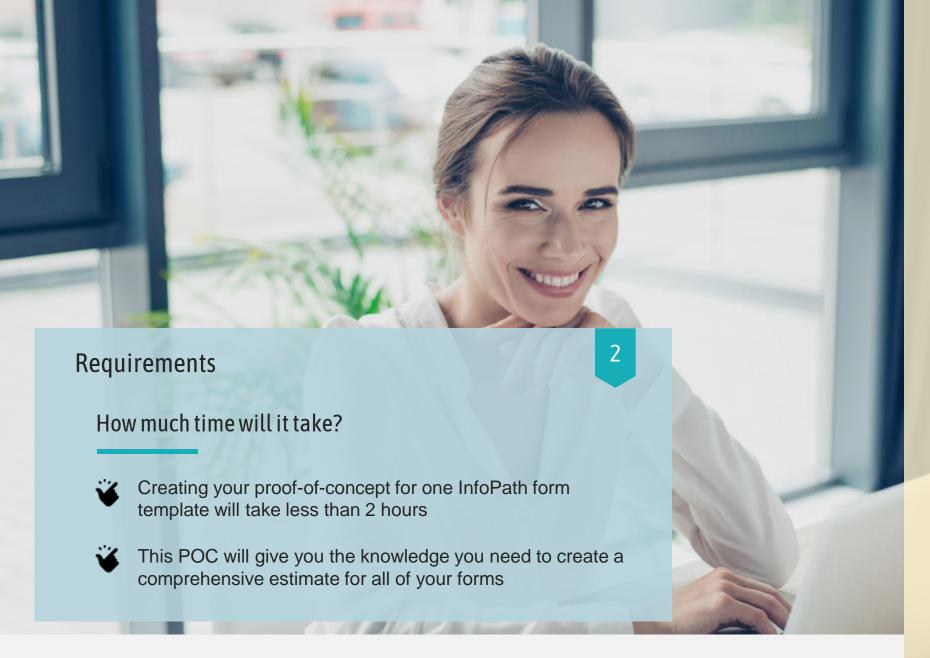
Minimal Migration Workload from InfoPath

Powerful Features Available for Your Forms

Create Complex, Scalable Solutions with Less Effort

What you need

- SharePoint Online / 365
  - ⊕ On-Prem? Click [here](#)
- Site Collection Admin Access
- InfoPath Form Template (XSN) for your prototype

Compatible with:

- ☑ List Forms
- ☑ Library Forms

Requirements

2

How much time will it take?

- 👆 Creating your proof-of-concept for one InfoPath form template will take less than 2 hours

- 👆 This POC will give you the knowledge you need to create a comprehensive estimate for all of your forms

▦ Don't have a form? [Create a Basic Form](#) from scratch and use it in Qdabra Forms.

Site Migration Steps Overview

Pre Planning & Estimate	Content Migration	Fixup Forms	Migrate Workflows	Final Delta Migration
• Know what sites, form templates, and workflows to migrate • Run Qdabra Diagnostics Tool • Assess workflow complexity • Create an ordered site migration plan	• Run SharePoint Migration Tool • Migrate all site contents	• Install Qdabra Forms app • Fix data connections and make dynamic • Beautify form layout with CSS • Convert unsupported controls • Configure library to open forms in Qdabra Forms	• Replace SharePoint Designer workflows with Power Automate flows (or Central Flows) • Open and submission form testing • Get key stakeholders' sign off	• Lock current site • Rerun SharePoint Migration Tool • Configure portal to redirect users to new form links • Inform users regarding site completion

Pre Planning & Estimate

1 Identify sites to migrate

2 For each site, identify all InfoPath form templates (list and library) and SharePoint Designer workflows

3 For each InfoPath form template, run Qdabra diagnostics tool (upload to FormsViewer and click diagnostics)

4 Review all SharePoint Designer workflows to assess complexity

5 Create an ordered plan of migrating sites

It is essential to understand what sites you'll be migrating to define your migration scope. It's also important to know where the content is going to be migrated to.

Pre Planning & Estimate

1. Identify sites to migrate

2. For each site, identify all InfoPath form templates (list and library) and SharePoint Designer workflows

   Identify how many forms to migrate and decide whether you'll also move the corresponding workflows to the new site.

3. For each InfoPath form template, run Qdabra diagnostics tool (upload to FormsViewer and click diagnostics)

4. Review all SharePoint Designer workflows to assess complexity

5. Create an ordered plan of migrating sites

Pre Planning & Estimate

1. Identify sites to migrate

2. For each site, identify all InfoPath form templates (list and library) and SharePoint Designer workflows

3. For each InfoPath form template, run Qdabra diagnostics tool (upload to FormsViewer and click diagnostics)

4. Review all SharePoint Designer workflows to assess complexity

5. Create an ordered plan of migrating sites

Assume each form takes 1-2 hours to make data connections dynamic prior to migration, reformat User fields to handle Claims formatting changes, and adding a CSS to give the forms a nice facelift

Add 30 minutes for changes to GetUserProfileByName to account for Claims based formatting changes

Add 15 minutes for each control that needs to be fixed up (Combo Boxes and List Boxes)

Identify non-supported stuff (forms that write directly to a database w/o DBXL, forms that use digital signatures)

Pre Planning & Estimate

1. Identify sites to migrate

2. For each site, identify all InfoPath form templates (list and library) and SharePoint Designer workflows

3. For each InfoPath form template, run Qdabra diagnostics tool (upload to FormsViewer and click diagnostics)

4. Review all SharePoint Designer workflows to assess complexity

5. Create an ordered plan of migrating sites

Add 1 hour for each page of actions in the SPD workflow

Do they contain Parallel blocks?
If so, add 2 hours per block

Do they contain Impersonation steps?
If so, add 15 minutes per Impersonation step

Pre Planning & Estimate

1 Identify sites to migrate

2 For each site, identify all InfoPath form templates (list and library) and SharePoint Designer workflows

3 For each InfoPath form template, run Qdabra diagnostics tool (upload to FormsViewer and click diagnostics)

4 Review all SharePoint Designer workflows to assess complexity

5 Create an ordered plan of migrating sites

Communicate dates to key stakeholders

Content Migration

1

Run the SharePoint
Migration Tool

2 Migrate site contents

The SharePoint migration tool will help migrate all your content from older SharePoint versions into a new environment. It's a tool that will help you move metadata, customizations, workflows, permissions, information architecture, and workflows.

Content Migration

1. Run the SharePoint Migration Tool

2. Migrate site contents

Migrate all site content with a cutoff date filter (all data modified until date-time)

Why Qdabra Forms?

✅ **LOWEST COST WAY TO LET GO OF INFOPATH**

- Only "As-is" Migration Path for InfoPath, Zero to Minimal Effort
- Future Proof your Existing Forms Investment
- Supports List Forms, Modern UI, Teams Sites, and more

✅ **QDABRA SUPPORT – YOU'RE NEVER ALONE!**

- Expert Help to Improve your Projects
- Continuous Engagement – Monthly Pings
- We just shipped FormsViewer v6.1

✅ **GET NEW FEATURES, LIKE EXTERNAL USER ACCESS**

- Add Mobile View Support in Minutes
- Integrate with Today's Technology (SMS, Face Recognition, etc.)
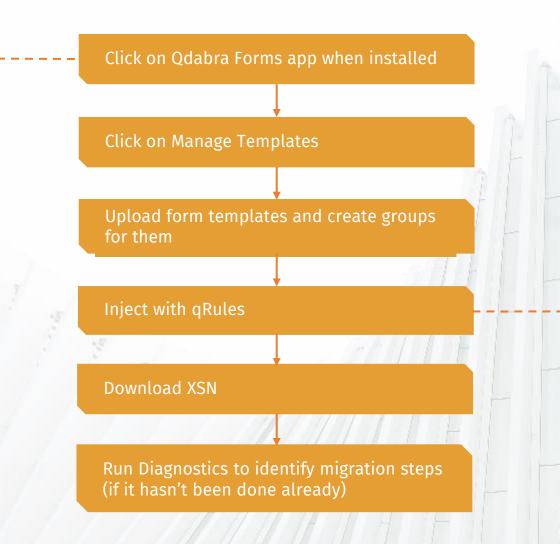- Customize Forms for your Business Needs

✅ **NOW AVAILABLE IN THE SHAREPOINT STORE!**

- From "Add An App" in your SharePoint Site, select SharePoint Store
- Search for FormsViewer, select the app, and click Add It – three clicks and you're done!

Fixup Forms

1 Install Qdabra Forms app on target site

2 Reconvert UDCX data connections

3 Make Data Connections Dynamic

4 Enable Responsive UI

5 Enable Validation

6 Convert obsolete controls

7 Change User Profile to new O365 Claims based format

Click on Qdabra Forms app when installed

Click on Manage Templates

Upload form templates and create groups for them

Inject with qRules

Download XSN

Run Diagnostics to identify migration steps (if it hasn't been done already)

i qRules is a library of commands not included in out-of-box InfoPath. When your form is injected with qRules, you can fill common gaps in InfoPath (for example, you can submit / query SQL data, generate PDF, Save files to SharePoint without having to write code).

Fixup Forms

1. Install Qdabra Forms app on target site

2. Reconvert UDCX data connections

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7. Change User Profile to new O365 Claims based format

Run Qdabra's Revert UDCX tool (downooad here) to convert UDCX to normal data connections.

FormsViewer supports UDCX but recommends reconverting for two reasons
- Improve load times
- Make form templates migratable

Fixup Forms

1. Install Qdabra Forms app on target site

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To ease migration, you'll want to make the data connections dynamic, so that you don't have to manually edit the form after moving. Add Dynamic Data Connections XTP to your form using Forms Designer (or InfoPath Designer). Takes about 30 minutes per form template."

Fixup Forms

1. Install Qdabra Forms app on target site
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In InfoPath Designer – add rules in finishedLoading:

- **GetInputParameter** to determine SPHostUrl
- **GetInputParameter** to determine listname
- **ChangeConnectionUrl** to change Main data connection
- Query Main Data Connection (if ID is not blank)

Check "Suppress loading list items on form open" to enable **&FVSkipListItemLoad=true**

&FVSkipListItemLoad=true

Adding this to the URL will cause FormsViewer to place the list item ID (if there is one) in the query field, but not actually query it, allowing you to use ChangeConnectionUrl to get the list item.

Fixup Forms

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If you encountered the error below, that's because your users are not migrated. You have to ensure that you select the option to migrate users using SharePoint Migration Tool.

Rule Error

The 'Query Item' rule was not applied.

Details:
Failed to execute connection: Main Data Connection
Error: User cannot be found.

OK

Fixup Forms

1. Install Qdabra Forms app on target site

2. Reconvert UDCX data connections

3. Make Data Connections Dynamic

4. Enable Responsive UI

   Add CSS and configure to match the device resolutions you want to target. Takes 10 minutes to an hour.

5. Enable Validation

6. Convert obsolete controls

7. Change User Profile to new O365 Claims based format

Fixup Forms

1. Install Qdabra Forms app on target site

2. Reconvert UDCX data connections

3. Make Data Connections Dynamic

4. Enable Responsive UI

5. Enable Validation — Add GetErrors command to validate required fields (takes 10 minutes)

6. Convert obsolete controls

7. Change User Profile to new O365 Claims based format

Fixup Forms

1. Install Qdabra Forms app on target site

2. Reconvert UDCX data connections

3. Make Data Connections Dynamic

4. Enable Responsive UI

5. Enable Validation

6. Convert obsolete controls

   Convert combobox and listbox to dropdown in repeating section or table. Review other workarounds here

7. Change User Profile to new O365 Claims based format

Fixup Forms

1. Install Qdabra Forms app on target site

2. Reconvert UDCX data connections

3. Make Data Connections Dynamic

4. Enable Responsive UI

5. Enable Validation

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7. Change User Profile to new O365 Claims based format

DBXL Active Directory Web Service will not require format fixup, but will require change to Web Service location

Twilio/Authy external authentication solution is also available (add 20 minutes per form)
- Dashboard forms have extra logic to prevent multiple auths

Fixup Forms

8

Upload form template to FormsViewer

Optionally, you can also publish the form

9 Test opening forms using Open from FormsViewer UI

10 Relink new form library view using

Fixup Forms

8 Upload form template to FormsViewer

9

Test opening forms using Open from FormsViewer UI

This is to test if there are any form load rule errors, check look of the form and overall functionality.

10 Relink new form library view using

Fixup Forms

8 Upload form template to FormsViewer

9 Test opening forms using Open from FormsViewer UI

10 Relink new form library view using:

FVlinks.js for Classic views

FormsViewer Extension App for Modern views

Special handling for list forms:

In the FormsViewer Extensions config, add the listname parameter at the end of the FormsViewer URL:
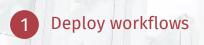
`&listname=<SharePointListName>`

Migrate Workflows to Power Automate or Central Flow

1 Deploy workflows

2 Test opening and submitting forms

3 Get sign-off from key stakeholders

Create and deploy Power Automate flows (or Central Flows) in place of SharePoint Designer workflows

Watch our recent webinar on how to centralize workflows to reduce maintenance here.

Stay tuned for our Parallel Central Flows webinar next month!

Migrate Workflows to Power Automate or Central Flow

1 Deploy workflows

2 Test opening and submitting forms

This is to test if there are any form load rule errors, check look of the form and overall functionality.

3 Get sign-off from key stakeholders

1 Deploy workflows

2 Test opening and submitting forms

3

Get sign-off from key stakeholders

Inform the impacted users what the changes are and list all necessary steps they should take so you can analyze how the users are feeling about and reacting to change.

Final Delta Migration

1 Lock current site

Lock sites so it will be inaccessible to users and the system.

2 Run SharePoint Migration Tool

3 Add links for users

4 Communicate Completion

Final Delta Migration

1. Lock current site

2. Run SharePoint Migration Tool

Execute again on the site with filter to only update items that have changed after previous cutoff.
Note: assumes form templates were not modified.

3. Add links for users

4. Communicate Completion

Final Delta Migration

1. Lock current site

2. Run SharePoint Migration Tool

3. Add links for users

Add text and redirection links to the old site so that your users will know where to go for the new forms.

Customize user portal so users will be redirected with minimal confusion to the new forms.

4. Communicate Completion

Final Delta Migration

1. Lock current site

2. Run SharePoint Migration Tool

3. Add links for users

4. Communicate Completion

Socialize your success with an email informing users of the new site and migration success.

Post an announcement so users are well-informed and know what to expect after the migration.

Steps Overview

3

Add Features! ☺

Modernize Your Form Solutions

🖐 Qdabra Forms also adds support for modern UI and mobility features. You can add smart phone authentication, responsive UI for high resolution devices, external access for users without login accounts, PDF generation – and more!

Auto-save and logout.

[Download](#) XTP ✓

Responsive UI for mobile (using CSS)

[Training Lab Day 3](#), [Video](#) ✓

Add signature control and/or two-factor verification

[Webinar](#) ✓

Map your form data to a SharePoint List

[Document](#) ✓

Save attachments and replace with link

[Training Lab Day 2](#), [Video](#) ✓

❓ Don't have time? Let our Design Pros create your form for you!
Email: [Qdabra Support](#)