

## How to manage your Flow (Power Automate)

Most campus “request” Flows are active for a specific period. However, even for Flows that are always active, following these procedures will help you better manage your data.

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### Ownership

Power Automate considers a Flow’s creator the primary owner. Since it uses the primary owner’s M365 account when sending email communications, any replies to email will go to the primary owner. It’s recommended that the person most qualified to answer email questions take “ownership” of the Flow. A new owner can be assigned by following the [Transferring Flow Ownership](#) document instructions.

As part of this process, an MS Team will also be added as an owner to make it easier for team members to access the Flow if the primary owner leaves. Most Flows technically belong to a group, office, or department and linking the Flow to Teams is sensible. That said, if the Flow is just for your personal work, adding a team may not be necessary.

### Authentication

All actions in a Power Automate flow are associated with an M365 account. Therefore, it is vital that a Flow’s owner makes sure their account is active to ensure a flow runs properly.

### Recommended:

- After tuning on your computer, log in to M365 using a browser.
  - When prompted, authenticate using your MFA (Multi-Factor Authentication)
- Select the Power Automate icon (once a week).
  - When prompted, authenticate Flow connections.

### Make sure Flow is Running

For a flow to process requests, both the MS Form and Power Automate Flow must be on. In addition, the form must be set to accept submissions. Do the following to make sure your flow is running.

#### Turn on Flow

- Log in to [M365](#)
- Select the **Waffle** icon (top-left corner) and select **Power Automate** app
- Select **My Flows** from left menu
- Select **Shared with me** tab and find your flow
- Select flow name to open it
- Select **Turn On** button on top menu (use ... **more** button if not displayed)

#### Turn on MS Form

- Log in to [M365](#)

- Select the **Waffle** icon (top-left corner) and select **Forms** app
- Select ... **more** button and **Settings** button
- Confirm *Who can fill out this form* settings are correct
- Select **Accept responses** check box
  - Use **Start/End date** boxes for limited-access forms (see [Inactive and Limited-Access Flows](#))

### Inactive and Limited-Access Flows

If a flow is inactive for more than 90 days, Microsoft will automatically turn off a Flow (the creator-owner will receive warning emails). This is especially important for limited-access flows that only run for short periods during the year. Do the following to ensure your Flow is active when needed.

- Turn off the Flow when requests are no longer being accepted (request that are running will still be processed through the Flow)
- Turn off the MS Form (the “Trigger” for most Flows is an MS Form posted on a campus website)
- Set a reminder in Outlook for the date the flow should be turned on
- Use the instructions above to turn on the form and flow (see [Turn on Flow](#))

### Run a Quick Test

When you turn on a Flow, run a quick test to make sure it’s working. Fill out the Form using the same link posted for users (normally on a website). Submit the form using your email address and the same test-data for each question (e.g. TEST-Alex-2025). Now open the “running” flow:

- Log in to [M365](#)
- Select the **Waffle** icon (top-left corner) and select **Power Automate** app
- Select **My Flows** from left menu
- Select **Shared with me** tab and find your flow
- Select flow name to open it
- Select the running flow under the “Start” column in the **28-day run history** area (likely, the run will be the top entry)
- You should see green checkmarks for all the actions until the first approver.
- Select **Cancel** button (on the top-right corner).
- Select **Ok** button

### Trouble-shoot a Flow

Power Automate is very reliable and the Flows have been designed not to “break” when users respond in “unexpected” ways. Normally, if a flow run is “stuck,” an approver has failed to respond to an approval email. Most flows have reminder emails to help with this issue, but sometimes an approver still misses the approval email (remember, an approver can respond in Teams and in Power Automate – watch [3 Ways to Respond to an Approval Request](#) – 01:33).

For general guidelines on how to check a flow, follow the instructions below. You may also want to watch the [How to Check On a Running Flow Request and Troubleshoot a Failed Flow](#) – 03:37 video. If you can’t figure it out, contact the CCI/CTS for assistance.

## Finding a Run

Often, there are dozens of active runs and it's unclear which run you're looking for. If you know the name of the submitter (or the first reviewer – like the Instructor for a student submission), it can help you find when the request was submitted (by searching the SharePoint LIST). You can use the submission time found in the LIST to locate the run in Power Automate.

## Search for Request in LIST


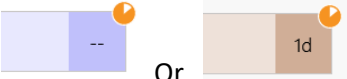

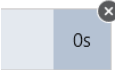
- Find your team in Teams
- Select **General** channel and **Files** tab
- Select ... **More** button (located on middle menu bar)
- Select **Open in SharePoint** button (browser opens)
- Select the Flow-LIST on the left pane (each flow has a name)
- Select **Created** header and **Newer to older**
- Scan to find the request:
  - Check the **Submitter** column
  - Check the **Instructor/Chair/Contact** column
  - Check the **Course/Program** column
- Note the date-time the request was submitted

## Search for Run in Flow

Using the date-time of the request, open the most likely flow runs until you find the right run.

- Follow the [Run a Quick Test](#) instruction to open a flow run.
- Open **Data is added to the SharePoint LIST** folder.
- Select **Data is added to the LIST** action and scroll down to the OUTPUTS section.
- Review the data in the *Body* fields to confirm you have the correct run:
  - Search for fields that match your data (Email, Title, Name, Course, etc.)

Once you have found the flow, use the information below to help you identify what the flow is doing. Normally, the flow is waiting for an approver to respond. In that case, you can contact the approver and ask them to respond.

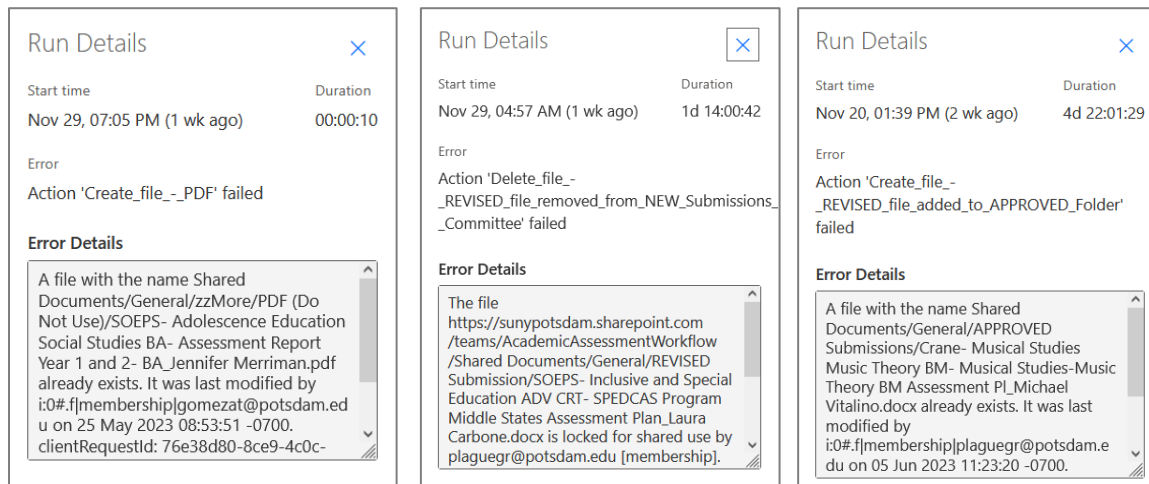
- Review the flow (you can now see each step of the flow):
  - GREEN Checkmark: Indicates an action has succeeded.
    - 
  - YELLOW Pie-chart: Indicates the flow has paused at the action (the flow is waiting for an action to complete).
    -  Or 
  - GRAY X mark: Indicates that the actions didn't run (sometimes because a previous action failed)
    - 
  - RED Exclamation: Indicates an action has failed (see [When an Action has Failed](#)).



- If the error is a known issue (see [Document Submission Error](#)), do one of the following:
  - **Move Docs:** If all approvers approved/rejected the submission, manually move the documents to the correct folders. No other action is needed.
  - **Restart:** If only the first approver approved/rejected the submission, restart the submission and inform the approver of the error (see [Restarting an Active Run](#) for restart instructions).
- If the error is an unknown issue, do one of the following:
  - **Restart:** If the flow failed early on, you might try restarting it to see if it works. Be sure to inform the first approver if they previously approved (see [Restarting an Active Run](#) for restart instructions).
  - **Contact Support:** If you suspect the error might be with the flow design, contact the CCI/CTS for help trouble-shooting the issue.

### Document Submission Error

Flows created using the “Document Submission” template can fail when an approval is submitted while the review document is still open. Here are a few captures of what the errors might look like. Notice that in each case, a “Delete or Create” action failed. This is because the file was open and the Flow couldn’t access a file in use.



### Archive Data

Request-data can quickly become hard to manage if you don’t archive past requests. Before you reactivate a Flow, archiving old data will make processing the new data much easier (it won’t be in the way). Since most Flows use an MS Form and a SharePoint LIST spreadsheet, the first decision you need to make is if you want to archive both sets of data. The MS Form data is normally added to the LIST, so if you don’t need a data set with only the requestors data, you can just archive the LIST data. At the end of each semester, do the following:

#### MS Form Data

The following three steps must be taken to archive and clear MS Form data (copy, clear; sync). If you choose not to archive MS Form data, skip the *Copy MS Form* instructions.

### Copy MS Form

- Log in to M365 and select **Forms** icon
- Select the **Shared with me** tab
- Select your *Team* from the **My groups** section (use **Show more** if your Team isn't listed)
- Select the flow Form
- Select the **Responses** tab
- Select the **Open in Excel** button
- Select **File**, and **Save As** (from Save As menu)
- Update the file name (add a date like "Archive- 12-20-22" to the end of the file name)
- Select the *Location* pull-down and select **More save locations** (at bottom)
- Select a folder in Teams in which to "archive" your data
- Select **Save Here** button

### Clear MS Form Data

- Return to the MS Form tab in the browser
- Select the **Responses** tab
- Select the **... more** button and **Delete all responses**
- Select **Delete** button (in gray window by form title) to confirm

### Sync Data to New Spreadsheet

- Select **Collect Responses** button
- Select **Copy Link** button
- Paste link in a browser and submit a "test" form (Turn Flow OFF before submitting)
- Return to the MS Form tab in the browser
- Select the **Responses** tab
- Select the **... more** button and **Sync all responses to a new workbook**
- Select **OK** button (in gray window by form title) to confirm

If the MS Form is active to submitters, Turn ON the flow (see [Turn ON Flow](#)). Otherwise, add a reminder in Outlook for the date the flow should next be turned on.

### SharePoint LIST Data

The following two steps must be taken to archive and delete SharePoint LIST data. Since LIST data contains both the MS Form and Flow data, most Flow owners may opt to only archive LIST data. Regardless, you should follow these instructions at the end of each semester.

### Export LIST Data

- Find your team in Teams
- Select **General** channel and **Files** tab
- Select the **... More** button (located on middle menu bar)
- Select the **Open in SharePoint** button (browser opens)
- Select the Flow-LIST on the left pane (each flow has a name)
- Select the **Export to Excel** button (make sure *Save File* is selected)
- Find the saved file in *Downloads* folder
- Move the copy to an "archive" folder in Teams

### Delete LIST Data

To clear the data from the LIST table, you must delete each row. However, if you have a lot of row data, this will take a bit of work. The delete function will only delete selected rows and you can only select rows that are visible (i.e. you can't select rows on other pages).

- Return to the LIST page in the browser
- Check circle to left of **ID** header (all visible rows will be selected)
- Select **Delete** from top menu (select delete again to confirm)
- Refresh the page if necessary
- Repeat the previous steps until all rows are deleted

When new data is added to the LIST table, the ID field will continue from the last item number (i.e. the next item added to the list will NOT start over with the number one). Although the item has been removed from the LIST table, the data is NOT permanently deleted. It is saved in an archive location for several weeks and the ID field is still in use by the record.

### Archive Submitted Documents

For flows that allow the submission of documents, it may be helpful to clear document files from the MS Form folder at the end of each semester. Reminder- Although submitted documents could be automatically removed, we don't remove them because they help address issues caused when resubmitting. The file name of a resubmitted document will be automatically changed (the file name will be augmented with a -1, -2, etc. suffix). This file name change ensures that the actions that "move" files around will work properly in the flow.

### Move Documents to Archive Folder

Once submissions for the current semester have ended, documents should be in one of two teams folders: **APPROVED Submissions** and **REJECTED Submissions**. To prepare for the next semester of submissions, do the following (note: you may select a different archive file location than the one listed in the instructions below):

- Find your team in Teams
- Select **General** channel
- Select **Files** tab
- Select **APPROVED Submissions** folder
- Select **New** button and **Folder**
- Name your folder (e.g. Spring 2025)
- Move "Approved Submission" documents into the newly created folder.
- Select **General** channel
- Select **Files** tab
- Select **REJECTED Submissions** folder
- Select **New** button and **Folder**
- Name your folder (e.g. Spring 2025)
- Move "Rejected Submission" documents into the newly created folder.
- Confirm that NO documents exist in the flow submission folders (**NEW Submission, APPROVED Submissions, and REJECTED Submissions**).

## Remove Documents from MS Form Folder

Once submissions for the current semester have ended, remove documents from the MS Form folder associated with your team. (**Location:** Documents/Apps/Microsoft Forms/*Name-of-Form*).

- Find your team in Teams
- Select **General** channel and **Files** tab
- Select the ... **More** button (located on middle menu bar)
- Select the **Open in SharePoint** button (browser opens)
- Select **Documents** from left menu
- Select **Apps** and **Microsoft Forms** folder
- Select the folder for your form (same name as the MS Form)
- Select the folder for your document (same name as the document “upload” question in the MS Form)

NOTE: You should now see all the documents that were submitted using the MS Form.

- Select all items using the circle-toggle to the left of the document icon on the table column header bar.
- Select **Delete** button (located on top-menu)
- Select **Delete** button to confirm (all document files will be moved to the Recycle bin and will remain there for 60-days)