

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.

IMPORTANT: You MUST keep flow connections active by logging in to Power Automate regularly (see *Authentication* below).

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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 (available in the Power Automate section of Tech Tools).

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**).
 - Select My Flows tab on left menu.
 - When prompted, authenticate Flow connections.

WARNING: If you don’t regularly re-establish connections, Power Automate will eventually turn them off, causing the flow to stop working. If you forget to log in weekly, Power Automate should send you an email requesting that you confirm your connection. However, as a flow owner, it is recommended that you proactively log in to Power Automate weekly to ensure you never lose connections.

How to Fix an Inactive Connection

Sometimes when you go to a flow with a connection issue, you don’t receive a pop-up prompt to fix the connection. At this point, you have to edit the flow to fix the issues (watch [How to fix Connections in a Flow](#) – 03:05 for an example of this process).

- Select **Edit** button to open the flow (top-left menu)
- Search for any action with a **triangle-exclamation** icon
- Select the middle of the action to open it
- Select the "Invalid connection" link by your email account
- Log in to your account
- Select **Save** button (top-right corner)
- Repeat for each action that needs updating

Resubmit a Failed Flow Request

If you need to resubmit a failed requests (e.g., a request that has failed because of an inactive connection), follow the instructions below.

- Open the flow run (located in *28-day run history* section)
- Select **Resubmit** button (on the top-right corner).
- Select **OK** button to confirm

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 your *Team* from the **My groups** section (use **Show more** if your Team isn't listed)
- Select your flow form
- Select **Settings** (gear-icon) button
- Confirm *Who can fill out this form* settings are correct
- Select **Accept responses** check box (form will auto-save)
 - 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 (requests 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 flow and form (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

Update Flow Emails

As employees change positions or leave the campus, flow emails may need to be updated. Depending on the flow design, emails can be found in several locations (data is added action, check email actions, get email actions, create outputs actions, and in the “To” field of emails and approval emails). New flow design tries to add all emails in the “Data is added to the LIST” action whenever possible. While you might need to go directly to the email to make a change, **try to always reference *Dynamic Content* instead of adding an email address.**

IMPORTANT – Sequence

Whenever you are updating a flow, it is important that you do the following:

- Turn off the Form first
- Make changes to Form as appropriate
- Turn off the Flow [active requests will continue to run]
- Make changes to Flow as appropriate
- Turn on the Flow
- Turn on the Form

Turn off MS Form

- Log in to [M365](#)
- Select the **Waffle** icon (top-left corner) and select **Forms** app
- Select your *Team* from the **My groups** section (use **Show more** if your Team isn’t listed)
- Select your flow form
- Select **Settings** (gear-icon) button
- Select **Accept responses** to remove the check mark (form will auto-save)

Turn off 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 off** button on top menu (use ... **more** button if not displayed)

Update “Data added” Emails

Many emails are added in the “Data is added to the LIST” action. Subsequent flow actions reference these names and addresses when sending emails (including approval emails). To update, do the following:

- Turn off the MS Form, then turn off the Flow.
- Select **Edit** button to update the flow
- Select **Data is added to the SharePoint LIST** brown folder
- Select **Data is added to the LIST** green action
- Update the “Approver” and “Processor” names and emails (A1-A6, P1-P2).
 - **Text:** Name and Email text can be updated. If a field is empty or if it has *Content*, see the other instructions in the section to make changes.
 - **Content:** Some fields will have Outputs, Variables, or Expressions (e.g., Trim). See the other instructions in the section to make changes.
- Select **Save** button (top-right) and wait for green “Saved” banner
- When you’re done making changes, select the blue arrow (top-left) to exit

NOTE: Be sure to separate emails using a semicolon (e.g., gomezat@potssdam.edu;lawrenbs@potssdam.edu) and separate names using a slash (Alex Gomez/Bonnie Lawrence).

Update Variable and Expression Emails

You shouldn’t have to update either of these types of emails. These emails enter the flow from the MS Form (either the submitter’s email or a response to an “email” question). When the flow was created, all the appropriate dynamic content, expressions, and actions would have been added to capture, check, and use the email/name information.

Update “Outputs are created” Emails

Many flows route approval emails to a Dean or Provost Cabinet Representative using MS Form responses to the **School** or **Provost Cabinet** question. To update, do the following:

- Turn off the MS Form
- Select the **School** or **Provost Cabinet** question
- Make changes to the responses (as appropriate)
 - Note: If you add or remove a response, the flow may need further updating (contact CCI/CTS as appropriate).
- Copy any changes to Notepad/Word/etc. Make sure there are no extra spaces before/after selection.

- Turn off the Flow
- Select **Edit** button to update the flow
- Select **Data is added to the SharePoint LIST** brown folder
- Select **Outputs are created for...** brown folder
- Select **Switch...** action

For each response that was changed in the MS Form, now update the corresponding sub-category. Use the Notepad to copy and paste responses.

- Select sub-category (gray) and the brown folder within
- Select NAMES and EMAILS actions and update content as appropriate
- Select FORMS action and update response (copy and paste from Notepad)
- Select the “Equals” field above and paste (same as FORM response)
- Select **Save** button (top-right) and wait for green “Saved” banner
- When you’re done making changes, select the blue arrow (top-left) to exit

NOTE: Be sure to separate emails using a semicolon (e.g., gomezat@potdam.edu;lawrenbs@potdam.edu) and separate names using a slash (Alex Gomez/Bonnie Lawrence).

Update “Flow gets” Emails

Currently, flows can get emails from a single list (*Department Chair List* maintained by HR). If the MS Form uses the **Department** questions, the flow can use the department to get the Chair info (including the names and emails for the chair and co-chair). If you notice that the list is incorrect, please contact HR and have them update the list.

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




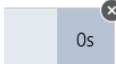

- Find your team in Teams
- Select **General** channel and **Files** tab
- Select ... **More** button (located on middle menu bar)
- Select **Open in SharePoint** button (browser opens)
- Select the Flow-LIST on the left pane (each flow has a name)
- Select **Created** header and **Newer to older**
- 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 mark: Indicates an action has failed (see [When an Action has Failed](#)).

 - MORE Actions: Select these actions to reveal other actions.
 - **Gray Actions:** These actions contain sub-actions.
 - **Brown Actions:** These actions are actually "folders" within the flow and they contain Actions.

- **Blue-Gray Actions:** These actions contain sub-actions, but you can't open the action to see them.
- **PURPLE Actions:** When checking an active run, the flow will likely be paused at a purple *Approval* action (the yellow circle indicates the flow is waiting for a responds).

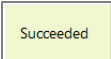

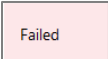
Restarting an Active Run

In some rare instances, you may find that you need to restart an active flow (a flow that has not failed). If you do, remember that the flow will start from the beginning. It will resend all emails and even if an approver has previously approved, they will need to approve again.

- Open the flow run
- Select **Cancel** button (on the top-right corner).
- Select **Resubmit** button (on the top-right corner).

When an Action has Failed

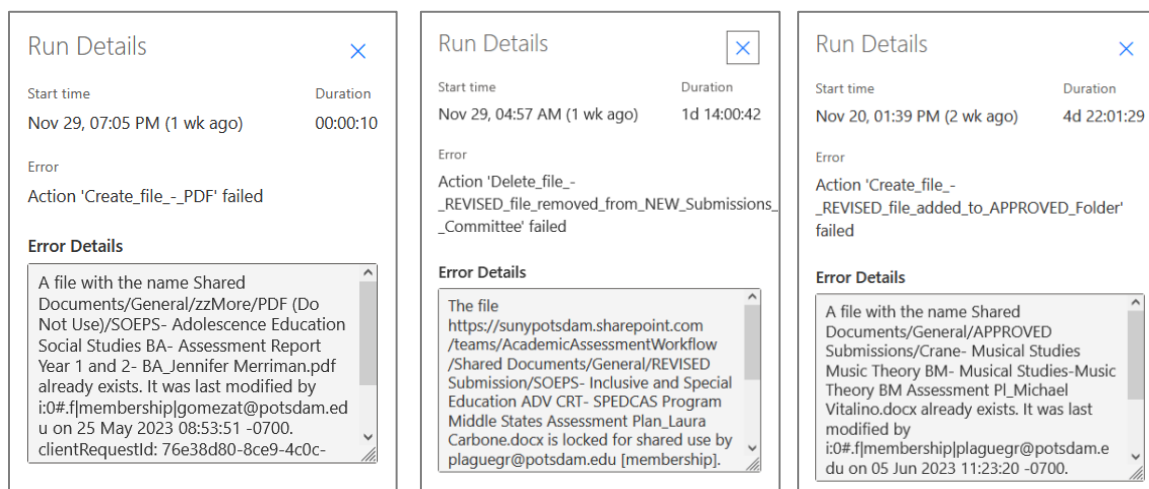
Once a designed flow is in working order, it is very uncommon for it to fail. That said, the “Document Submission” template can fail if an approver doesn't follow listed instructions in the approval email (they must close open documents BEFORE approving them). The following instructions outline steps you can take to address a failed 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 **All runs** from the **28-day run history** area
 - Use the **Show More** button at the bottom to display more runs.
- Review the Status
 - **GREEN** status: Indicates a flow has succeeded.
 - 
 - **WHITE** status: Indicates a flow is running.
 - 
 - **RED** status: Indicates a flow has failed.
 - 
- Select a failed flow start-time to open it
- Review the *Run Detail* window for information on why the flow failed (FYI- The language in this area is very “Coder-y” and hard to understand).
- 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** button
- Select the **Open results in Excel** button

- Select **File, Create a Copy**, and **Create a Copy Online**
- Update the file name (add a date like “Archive- 12-20-22” to the end of the file name)
- Select the *Choose 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 Excel Spreadsheet Data

- Return to Excel tab in the browser
- Select the data to remove by selecting the rows using rows column on the far left
- Right-click on the rows column and select **Delete Rows** option

Clear MS Form Data

- Return to the *MS Form Responses* tab in the browser
- Select the ... **more** button (by *View results* button) and **Delete all responses**
- Select **Delete** button to confirm

The linked excel spreadsheet will become visible again when a new request is submitted. If you need to find the spreadsheet, go to the *Documents* folder of the Team. 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)