How to manage your Flow (Power Automate)

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

Ownership

Power Automate considers a Flow's creator the primary owner. Since it uses the primary owner's O365 account when sending email communications, when a requestor replies to an email, the reply will go to the primary owner. It is vital that the person most qualified to answer these questions take "ownership" of the Flow before it is made available to requestors. If the Flow was created for you, please be sure to follow the ***How to Export and Import a Flow*** instructions to take ownership.

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 in the event that 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, a team owner doesn't need to be added.

Authentication

All actions in a Power Automate flow are associated with an O365 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 O365 using a browser.
  - When prompted, authenticate your using MFA (Multi-Factor Authentication)
- Select the Power Automate icon (once a week).
  - When prompted, authenticate Flow connections.

Making sure your Flow is ON

Microsoft's current policy is to automatically turn off a Flow if it is inactive for a "significant period of time." Currently, the inactive period seems to be somewhere between 60-90 days. If your Flow is designed for a specific time-period (e.g. the last two-weeks of classes), do the following to ensure your Flow is active for the period it is 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)
- Add a reminder in Outlook to turn ON the Flow (complete details for the steps listed below are listed in subsequent sections)
  - Archive the MS Form
  - Archive the LIST data from SharePoint
  - Turn ON the Flow
  - Turn ON the MS Form

Archiving Flow 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. Regardless, whether or not you archive the data from a source, you'll want to clear the data (remove the data from the form and LIST).

Archiving MS Form Data

- Log in to O365 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 from the listed forms
- Select the **Responses** tab
- Select the **Open in Excel** button
- Select **File** and **Save As** to save a copy (move this "archive" copy to a folder in Teams)
- Return to the MS Form tab in the browser
- Select the **… more** button and **Delete all responses** to clear the form

Archiving LIST Data

- Find your team in Teams
- Select the **… More** button (located on the top-right corner)
- Select the **Open in SharePoint** button
- Select the Flow-LIST on the left pane
- Select the **Export to Excel** button (make sure *Save File* is selected)
- Find the saved file in downloads and move this "archive" copy to a folder in Teams
- Return to the LIST page in the browser
- Select the **… more** button and **Delete all responses** to clear the form
- Select the "Select-All" radio button to the left of the ID field
- Select the **Delete** button to clear the LIST of all data

Be aware that the ID fields will continue from where you left off (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 this archived record.

Turning ON a Flow

In order for a request Flow to work, the MS Form must be on (i.e. accepting requests) and the Power Automate Flow must be on.

- Log in to O365 and select the **Power Automate** icon (select the **App Apps** button if not displayed)
- Select **My Flows** from the left pane
- Select the **Shared with me** tab
- Open the Flow by selecting the Flow text
- Select the **Turn on** button at the top (use the **… more** button if not displayed)

Now that the Flow is on, you can turn on the MS Form.

- Log in to O365 and select the **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 from the listed forms
- Select the **… more** button and **Settings**
- Make sure the **Accept responses** box is checked
    - Make sure that the ***Start/End date*** boxes are not checked

Run a quick Test

Now that the Flow is on, it's not a bad idea to run a quick test to make sure it's working. Fill out the request Form from the website (the location where the form is posted for your users). Submit the form using your email address and the same test-data for each question (e.g. TEST-Alex-2022). Now open the "running" flow:

- Log in to O365 and select the **Power Automate** icon (select the **App Apps** button if not displayed)
- Select **My Flows** from the left pane
- Select the **Shared with me** tab
- Open the Flow by selecting the Flow text
- Select the running flow from the **28-day run history** area (You can now see each step of the flow.)
    - Green checkmarks indicate an action has succeeded.
    - Gray actions can be expanded to reveal other actions.
    - The Flow will likely pause at Purple Approval actions (waiting for the approver to respond)
        - If you are the Approver, you can reply to have the Flow move to the next action
    - If the Flow seems to be working, but you can't complete the run (because someone other than you is the Approver of an action), simply use the **Cancel** button to stop the run.