Power Automate

Five Quick Tips

Webinar Companion Handout

What is Power Automate?

Initially released in 2016 as Microsoft Flow, **Power Automate**[1] is cloud-based low-code business automation software[2] that allows us to increase efficiency by performing business rules and workflow processes automatically without employing a team of dedicated developers to automate their processes.

Similar tools include **IFTTT** and **Zapier**. Each rule that you create in Power Automate is called a flow.

Make sure your flows are well documented.

When creating new flows, putting in a little work upfront often results in huge dividends on the backend.

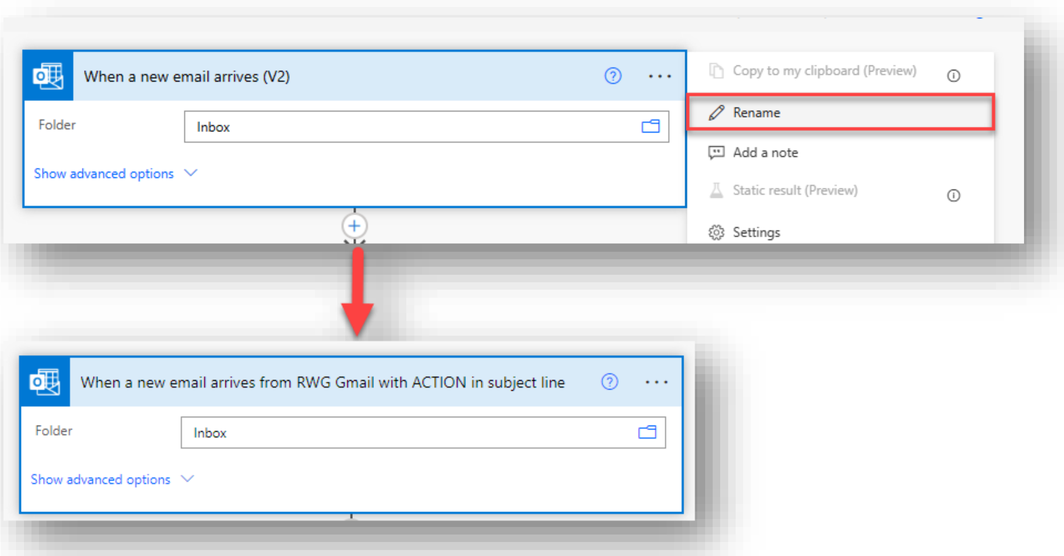
Tip #1: Rename Your Actions

1. Go to **...** in the upper right corner of your step.

2. Click **Rename**.

3. Rename or Customize the action.

By renaming each of your steps, this helps you determine at a glance the specifics of your task and distinguish it from other similar actions.



Renaming steps in your flow can be especially helpful when using variables.   This functionality is not available in Power Automate Desktop.

<u>CAUTION</u>: ***It is best to rename your step when you add it.*** Otherwise, if you wait until you are done with work on your flow, you may experience some unexpected consequences; the action may not be available or it may break your flow.

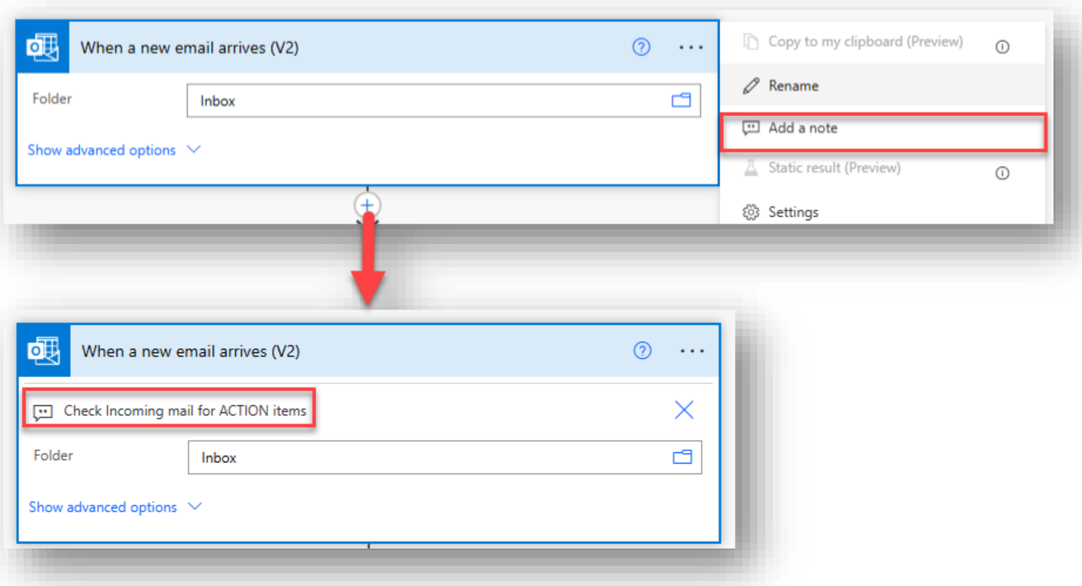
Tip #2: Add a Note

Another step you can take is to add a note a note to your flow step.

This provides additional context to the flow and can allow users to discern additional details about what actions or conditions are invoked in the step.

To add a note, follow these three steps:

1. Go to **…** in the upper right corner of your step.
2. Click **Add a Note**.
3. Add helpful details to your actions.



Adding notes is a best practice to ensure that others (or you) can retrace your steps later![3] In addition to this built-in documentation mechanism, consider creating an additional external record to document your flows.

This tip is different than collaborative comments for shared flows. For more information on that functionality, check out this article on Microsoft's Power Automate blog:

[Collaborative comments in Power Automate]

Don’t reinvent the wheel!

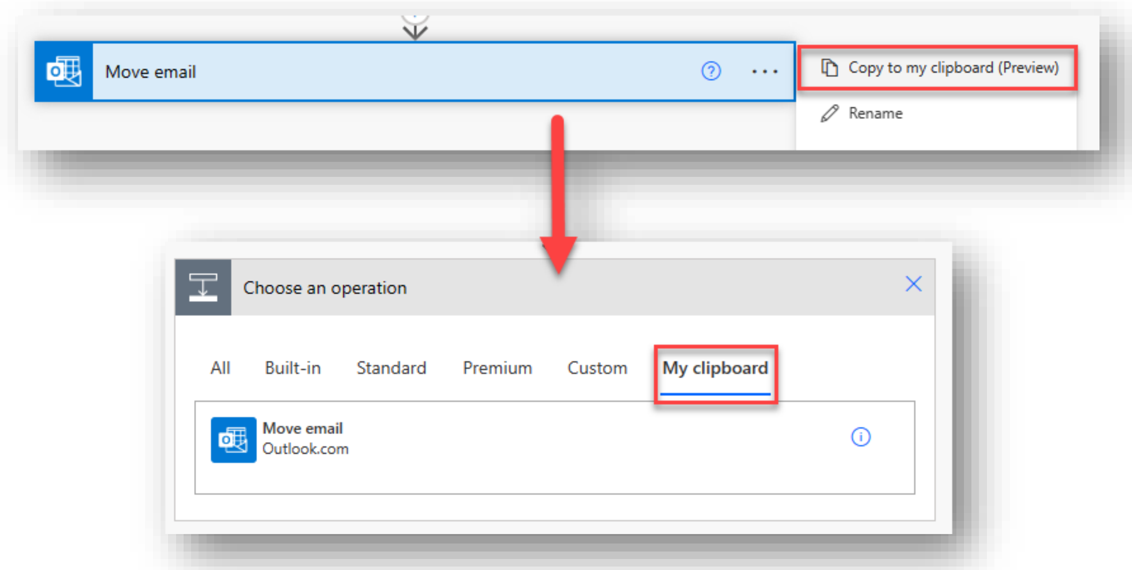
Tip #3: Copy and Paste Actions

In July 2019, Microsoft added the ability to copy and paste actions in preview.[4]

To use this feature, use the following steps:

1. Go to **...** in the upper right corner of your step.
2. Click **Copy to my Clipboard.**
3. On the Choose an operation window, choose **My Clipboard**.

You can also paste the contents of your action to notepad, which helps with documentation and sharing snippets.



Eliminate Single Points of Failure

With any process or workflow, you want to eliminate single points of failure, whether it is a person or related to technology.

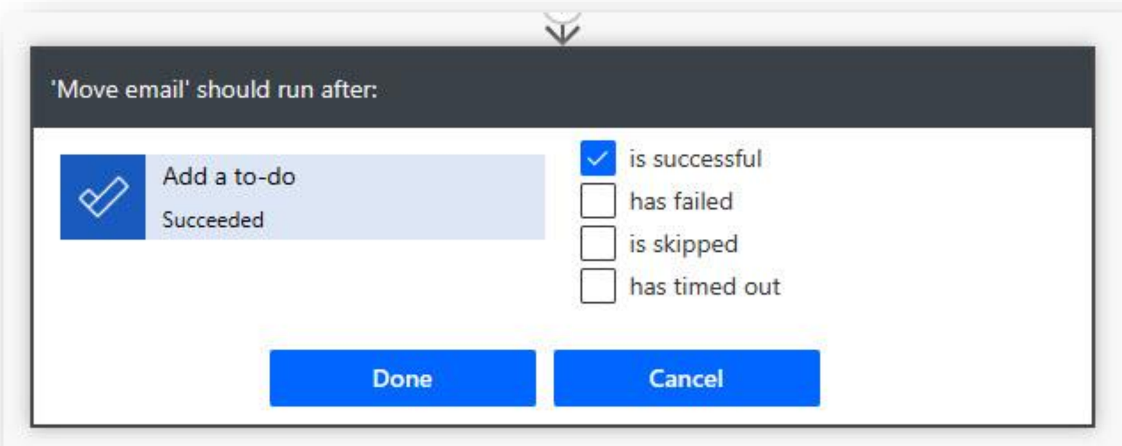
Tip #4: Configure Run After

The default setting is that the next step in your flow will run only if the previous one is successful. Although, Microsoft usually does a very good job of sending you notification if your flow fails, they provide another tool.

Within the **Configure Run After** settings, you can configure when you want a subsequent step to run. You can select from four options:

- is successful (default)
- has failed
- is skipped
- has timed out

If output from the previous step will not be used for the remainder of your flow, you can select that the flow should continue to run if the previous step is successful and if it fails.



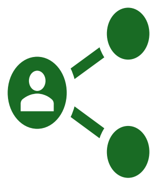
This functionality is also useful for error catching or when another step times out. For instance, if you have an approval that is pending.

To update the **Configure Run After** settings:

1. Go to **…** in the upper right corner of your step.
2. Click **Configure run after.**
3. Choose the condition when you would want to trigger the action.

Tip #5: Share or Send a Copy!

Another way to make sure that you have redundancy built into your process is by having multiple owners or copies of your flow.



On the main page of your flow,

- Select **Share**

OR

- **Send a copy**

To Share a flow:

- Add a user or group as owner.

Once you add others as co-owners of the flow, they will be alerted each time you make an update. They also can make changes to the flow and run it using the connections that you have already authenticated.

But this isn't your only option:

- You can share your flow with a **SharePoint list**. Everyone with edit Permissions to the list, will be granted edit permissions to your flow.
- If you only want users to be able to run the flow and not edit it, for **Instant Flows**, you can grant them run only permissions.
- If you want to share the structure of the flow without sharing your connections or maintaining joint ownership, you can **Send a copy**. However, once you share a flow as a template, you cannot revoke access to it.[5]

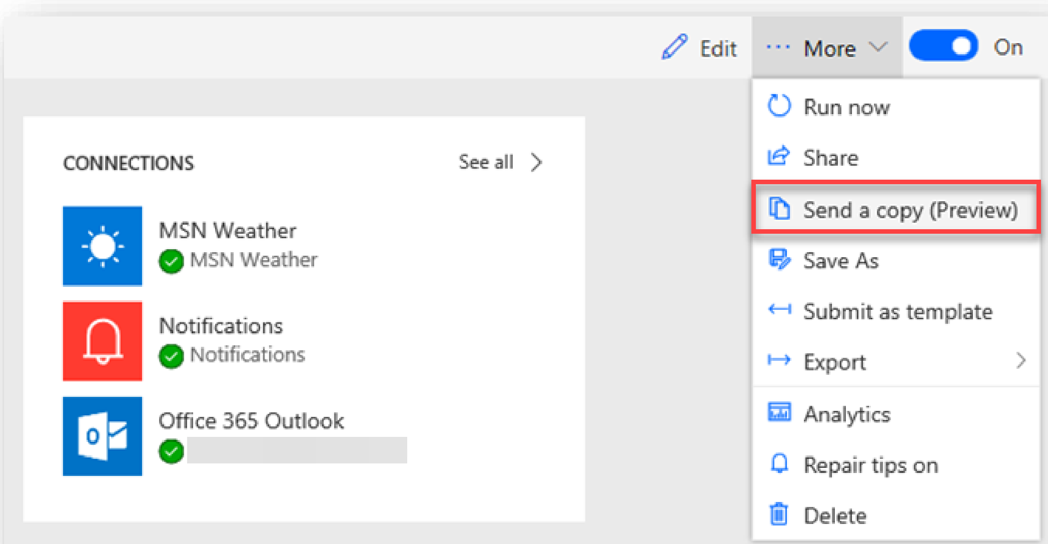
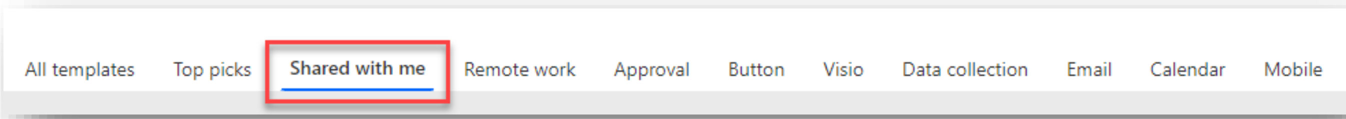


Illustration sourced from https://powerautomate.microsoft.com/en-us/blog/send-a-flow-as-a-copy/

To Send a copy:

1. Give your template a **Title**.
2. Provide a **Description**.
3. Enter the name, email, or user group that you would like to receive the shared flow.

When you send a copy, you in essence, create a template for others. Your recipients will be able to find it under the "**Shared with me**" tab on the **Templates** page.



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- **Flipboard:** https://flipboard.com/@RainwaterGrowth
- **LinkedIn**: https://www.linkedin.com/company/rainwater-growth-training-and-consulting/

Additional References

[1] https://en.wikipedia.org/wiki/Microsoft_Power_Automate

[2] https://www.redhat.com/en/topics/automation/whats-business-automation

[3] https://www.process.st/how-to/document-power-automate-flows/

[4] https://powerautomate.microsoft.com/en-gb/blog/introducing-clipboard-in-flow-designer-and-three-new-user-experience-updates/

[5] https://learn.microsoft.com/en-us/power-automate/create-team-flows