



Power Automate (Flow) and SharePoint Online

What does this guide cover?	Automation in SharePoint Online using Power Automate (Flow)
Who is it aimed at?	SharePoint Network Administrators (SNAs), Site Administrators, Site Owners and Site Members

All users are licensed to trigger and use Power Automate (Flow) but not to create Flows. To create Flows, you will need a Power Automate license for your user account, approved by your ITSS representatives.

Your IT support staff member can request a license through the [Oxford Service Manager \(OSM\) system online](#). Once applied for, the license will be granted, if approved, and you can begin using Power Automate.

Power Automate Overview - What is it for?

No-fuss automation across Nexus365 solutions and services

Power Automate (formerly Microsoft Flow) is an automation solution that allows users to build simple or complex workflows, called Flows, for use across various Nexus365 services including SharePoint. Power Automate licenses are applied to a user's account (via an OSM request) and this allows them to login to the Power Automate Portal and start building Flows, or allows them to build Flows directly from within SharePoint Online lists and libraries.

[Find out more about getting started with PowerAutomate](#)

[Find out more about using PowerAutomate with SharePoint Online](#)

Power Automate features many triggers, actions and Flow templates for use with SharePoint Online sites, to perform various functions automatically or on a scheduled basis. Here is a screenshot of some of the Flow triggers and example templates available for use by Power Automate users:

Triggers - A trigger is an event that starts a flow

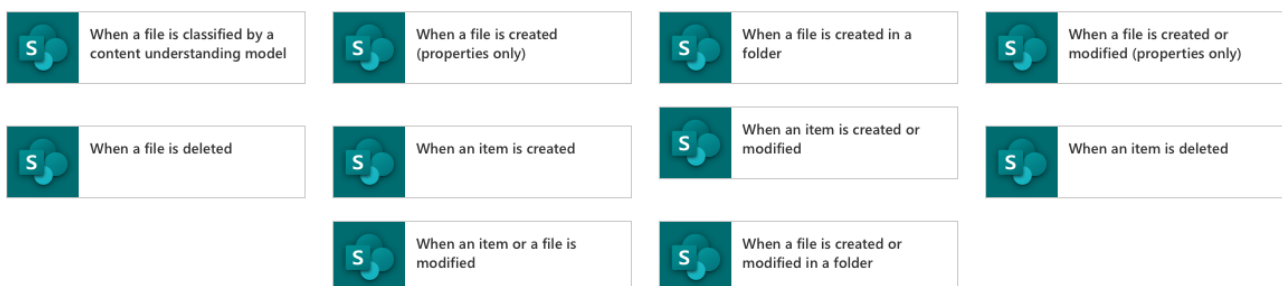


Figure 1: Some common triggers for Power Automate Flows and SharePoint Online

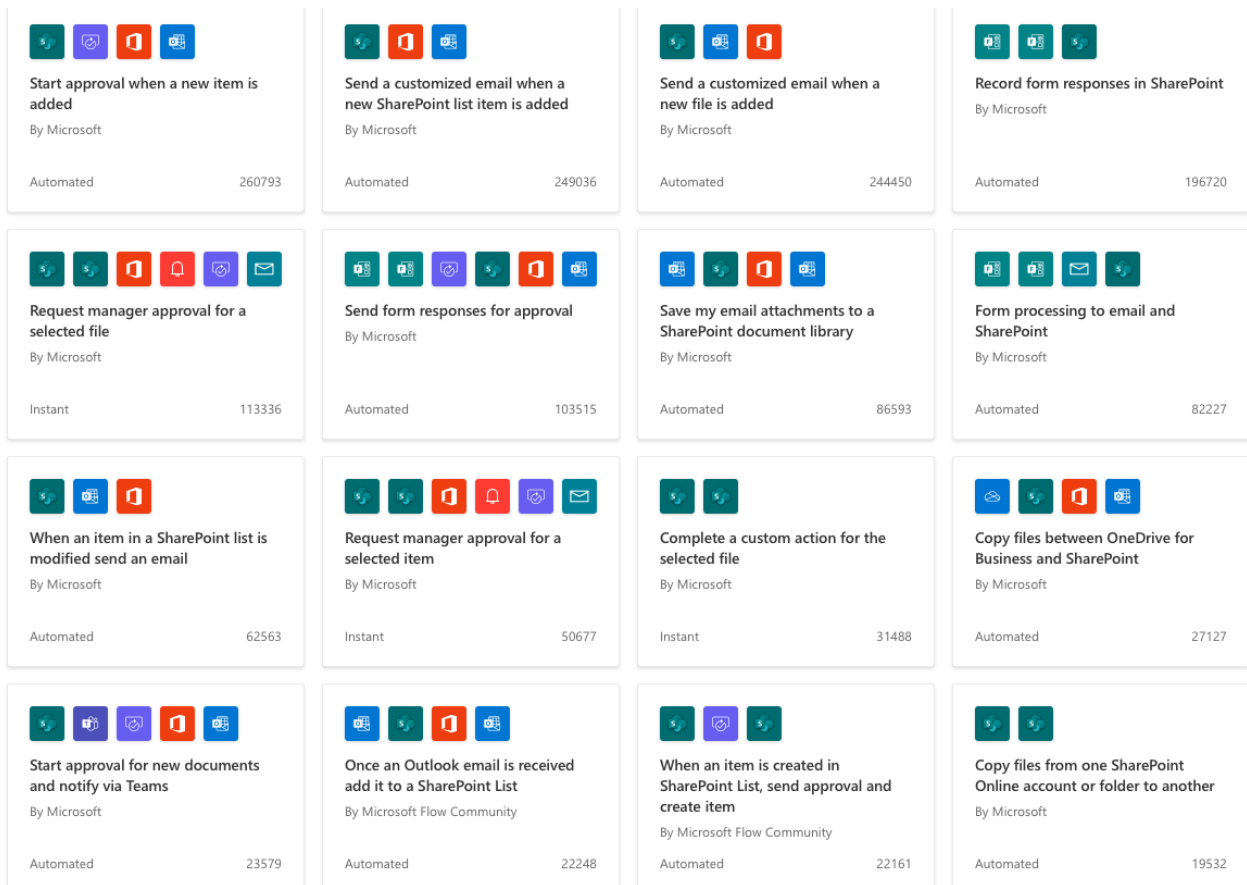


Figure 2: Example templates that can be adapted and used in your own SharePoint Online sites

Personal and Team Flows

Keep Flows for your own use or collaborate with other Flow or Site Users

Power Automate allows you to develop Flows entirely for your own use. These are called “My Flows” and will only be visible and usable by you. Once you’ve written and activated a Flow, it is tied to your user account and operates independently of the site you’ve written it to work in conjunction with. That is, Flows do not consume any resources from your SharePoint Online site.

However, users may have a requirement to use Flows as a team. When you share a Flow with others, whether they’re individual users, or an Office365 Team or Group, they will see that Flow in their “Team Flows” tab in their Power Automate Hub and you will also see it in the same place.

You can tailor Flows so that they can be triggered by Office365 group members only, or from specified SharePoint Online sites (at present, this only works for sites that are created with Office365 groups, not Standard Team Sites (no group) or Communications Sites).

[Find out more about sharing a Flow with others](#)

Note: Bear in mind that any connectors a Flow uses will be available to all “Owners” of a Flow once the Flow is shared in this way.

A simple PowerAutomate (Flow) Recipe

Taking Microsoft Form data into a Microsoft List in SharePoint Online

Here is a simple Flow recipe to take input from a Microsoft Form you've set up, into a list in SharePoint Online. This is useful if you want to share the results from a form with users, without giving them edit access to the form itself, or if you just want to keep a rollup list of all form submissions in SharePoint Online.

Recipe Overview

The Power Automate recipe for pulling results from Microsoft Forms looks like this:

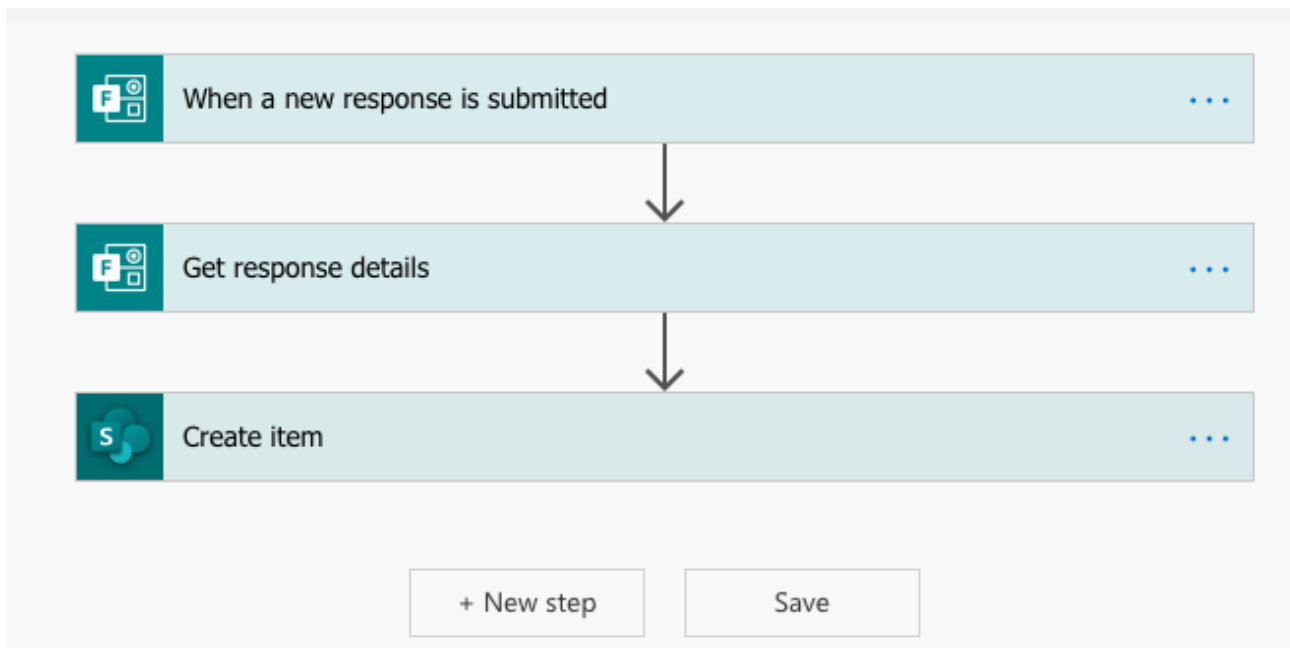


Figure 3. a Power Automate "recipe" to pull results from Microsoft Forms

Opening up the trigger and each of the actions reveals how this simple Flow is configured:

The Trigger

- "When a New Response is Submitted" – The trigger is configured with the ID (Name) of your Microsoft Form. Basically the Flow waits for someone to make a response before starting

Action 1 – Get Response Details

- "Get Response Details" – This pulls in all the details from the list of responses, in this case we're only interested in a single response

Action 2 – Create Item

- "Create Item" – This action is configured with the details of your SharePoint Online site. We're assuming that you have set up a SharePoint Online list with columns to match the fields in your form. This action takes responses from the previous action (get response details) and puts them into the corresponding columns in your SharePoint list.

....and that's it!

You can use other actions in this flow to send an email to someone, an approval request, and dozens of other useful automated actions. The list of responses can then be shared from SharePoint online as required, without giving anyone access to edit the original form.

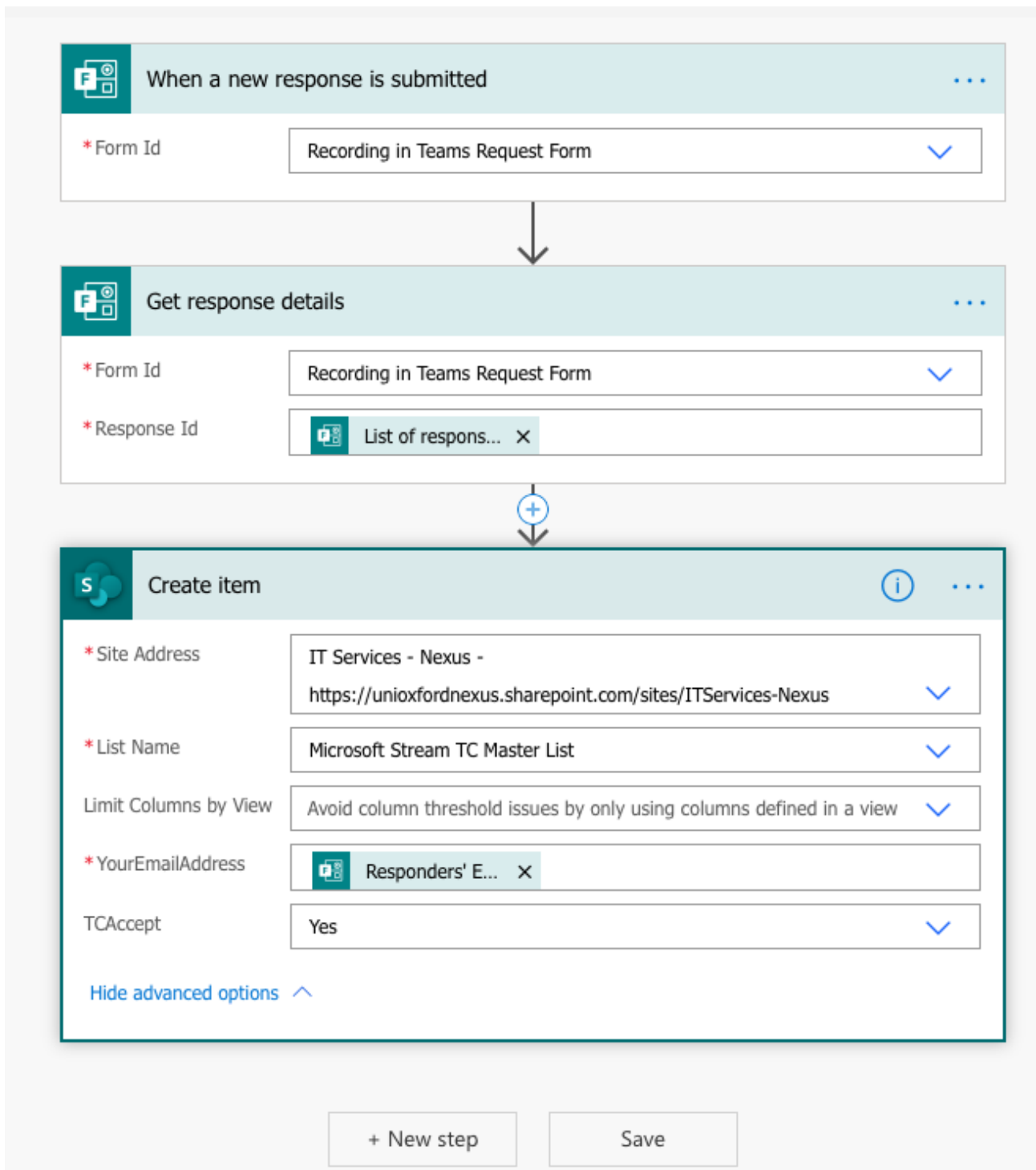


Figure 4. Options available for each stage of the "recipe" for pulling results from Microsoft Forms

Power Automate Tips and Best Practice

How to get the most out of using Power Automate Flows for SharePoint Online

Power Automate Flows can be as simple or as complicated as you want, however we would offer the following tips and best practice guidelines when using Power Automate Flows in your sites

- Always consider the security implications of using Flows, particularly when they connect between SharePoint Online and other services. Remember that any automated Flows that are triggered by user actions will be using your access privileges and credentials to interface with those other services
- Keep your Flows simple, short and to the point. Flows will always perform better when kept short and punchy. It's also worth considering that multiple Flows can operate on the same content simultaneously and independently with no resource overheads to your SharePoint Online site, as Flows run in an entirely separate service
- Power Automate is NOT a like-for-like replacement for Nintex Workflows, so functionality you may have used in Nintex may not directly transpose into a Power Automate solution. Experience has shown us that using Flow to replace Nintex in SharePoint sites has had a high level of success in either adapting existing solutions to work in different ways, or working with other Nexus365 services to fill in the gaps
- Though Power Automate is currently supported "as is", with no extra connectors or webhooks being enabled at the current time, Flow actions, triggers and third party features will be subject to evaluation by InfoSec / the Nexus Evaluation Group eventually, allowing us to grow the service in a safe, secure and well supported way