Go with the Flow

Power Platform

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#HSCCATLANTA19
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Why you should be using Microsoft Flow

- It will replace background workflows
- It is almost at parity with background workflows
- It is more capable than workflows
- Superior design and troubleshooting experience
- Make your customers' user experience better
- Can work with multiple other systems
Flow vs. Workflow
Comparing actions with classic workflow

<table>
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<th>Classic Workflow Action</th>
<th>Flow Equivalent</th>
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<td>Check Condition, Conditional Branch, Default Action</td>
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<td>Wait Condition</td>
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<td>Create, Update</td>
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<td>Terminate</td>
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*not an exact replacement
Security and Governance
Security
#1 Secure your data and network

1. PowerApps and Flow do not provide users with access to any data assets that they don’t already have access to. **Users should only have access to data that they really require access to.**

2. Network Access control policies can also apply to PowerApps and Flow. Blocking access to a site from within a network by blocking the sign-on page **will also prevent connections** to that site from being created in PowerApps & Flow.
#2 Use a Service Principal account


- Option to have Flow run under service account that is not tied to a specific user
"I don't want to use Flow because I don't want users creating bulk operations."

System flows in Dynamics run in the context of the Flow owner, not the user triggering the Flow. User actions can trigger Flow (just like workflow/plugins) without the users having the permission to create or run Flow directly.
#3 Know your environments

Environments are containers that administrators can use to manage apps, flows, connections, and other assets; along with permissions to allow organization users to use the resources.
#3 Know your environments

- Environments are tied to a geographic location that is configured at the time the environment is created.

- Environments can be used to target different audiences and/or for different purposes such as dev, test and production.

- Every tenant has a default environment, created automatically
#3 Know your environments... and your access control

- Environments are tied to a geographic location that is configured at the time the environment is created.

- Environments can be used to target different audiences and/or for different purposes such as dev, test and production.

- Every tenant has a default environment, created automatically.

- Access is controlled at three levels:
  - Environment roles
  - Resource permissions for apps/flows/etc.
  - CDS database security roles

- Key out-of-box security roles:
  - Environment Admin / System Administrator
  - Environment Maker
  - System Customizer

- Default environment = everyone is an Environment Maker

- Global tenant admins have admin access to all environments
#4 Prevent data leakage with DLP policies

- Data loss prevention policies (DLP) enforce rules for which connectors can be used together by classifying connectors as either Business Data only or No Business Data allowed.

- Simply, if you put a connector in the business data only group, it can only be used with other connectors from that group in the same app.

- Tenant admins can define policies that apply to all environments.
Approvals
Notifications
Data Quality
Automating System Jobs
Instant Flows
Put the F&O in Flow
## Connecting to Dynamics: Finance and Operations

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Things you need to know
Null conditions
Moving Flow between environments

- Can be moved in solutions or exported from Flow.com
- Connections must be reconnected in new environment
- Updating existing records
Which connector to use?

- Should be your default choice
- Use "(current)" for the environment
- Deploys from dev, test to production without any changes

- Mostly replaced by CDS Connector
- Still has some minor features like handling of multi select optionsets
Recommendations

• If it can be done with Flow, use Flow instead of background processes
• Use workflow for real-time workflows
• Exceptions—email templates, triggering actions, record URL’s
• Whenever possible, create flow from solutions
Want to be a maker?
Power Platform “App Factory”

- 4-week maker empowerment service
  - 3 days training
  - 2 days discovery around current manual processes
  - Iteration and development of up to 3 Canvas apps and 4 Flows