



# Robotic Process Automation in a Day

Lab prerequisites 1 – Install required software

30 mins

February 2023



This document is provided “as-is.” Information and views expressed in this document, including URL and other Internet Web site references, may change without notice. You bear the risk of using it. Some examples are fictitious and are for illustration only. No real association is intended or inferred. This document does not provide you with any legal rights to any intellectual property in any Microsoft product. You may copy and use this document for your internal reference purposes.

© 2023 Microsoft Corporation. All rights reserved.

# Pre-requisite task 1: Install required software on your computer (required)

This lab will guide you through the steps of installation required software on your computer. That is:

1. Power Automate for desktop app (PAD) and required extensions
2. Register machine
3. Contoso Invoice App

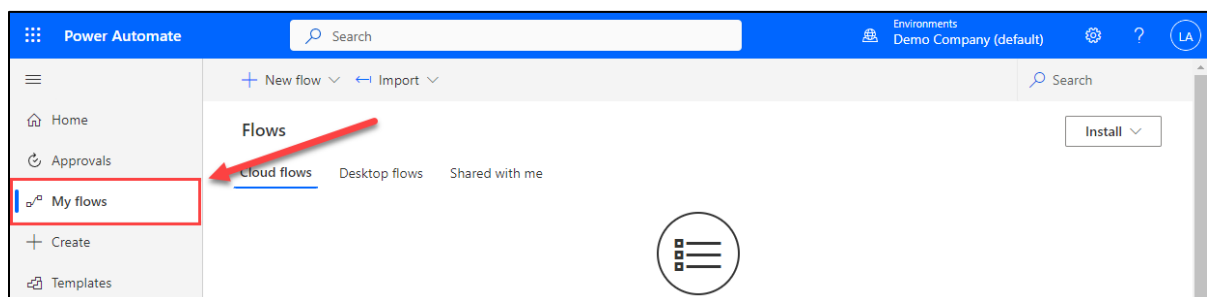
**Note:** follow the steps below if you haven't previously installed the above software. If you have Power Automate for desktop (PAD) app already installed and machine registered, check if you are **running on the latest version of PAD**. If not, it is recommended to update to the latest, by following the installation instructions below.

**Note:** If you have previously installed the legacy V1 UI flows exe or Softomotive RPA software, it is recommended to **uninstall/remove** all browser extensions from your browser first (Chrome, Edge, Firefox etc.)

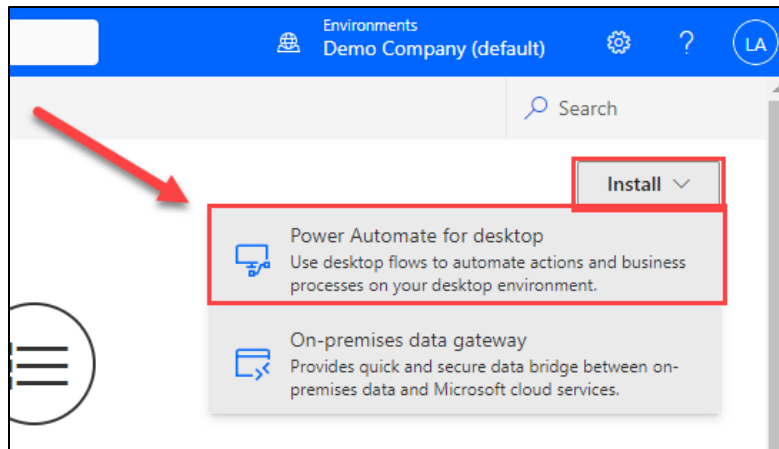
**Note: Please check machine requirements:** to ensure you log into your machine using an account with permission to install software, preferably an account with local administrator rights. The machine should have minimal Win10 Pro OS (operating systems) (or Win server 2019/2016 OS), .NET 4.7.2 and Edge (chromium) or Chrome browser installed. The machine can be a physical machine or a Virtual Machine (VM), however we do see performance issues on slow VMs so recommend choosing a high performance VM. Please check here for the full [Power Automate Desktop prerequisites & limitations - Power Automate | Microsoft Docs](#)

## Install Power Automate for desktop application

1. Navigate to <https://powerautomate.microsoft.com/> and sign in with the account you are using for the labs:
2. Select **My flows** from the menu to the left of the screen.

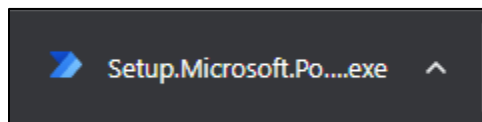


3. Select the **Install** drop-down to the right of the screen and choose **Power Automate for desktop**.

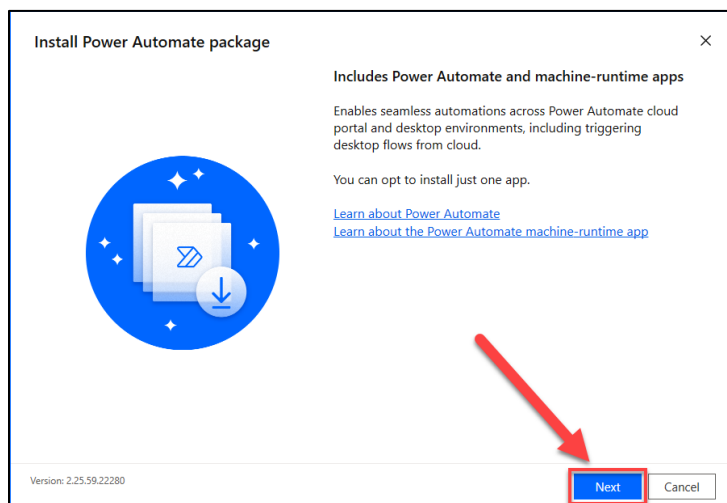


**Note:** Pay attention to the bar at the bottom of your browser where it shows the downloading progress.

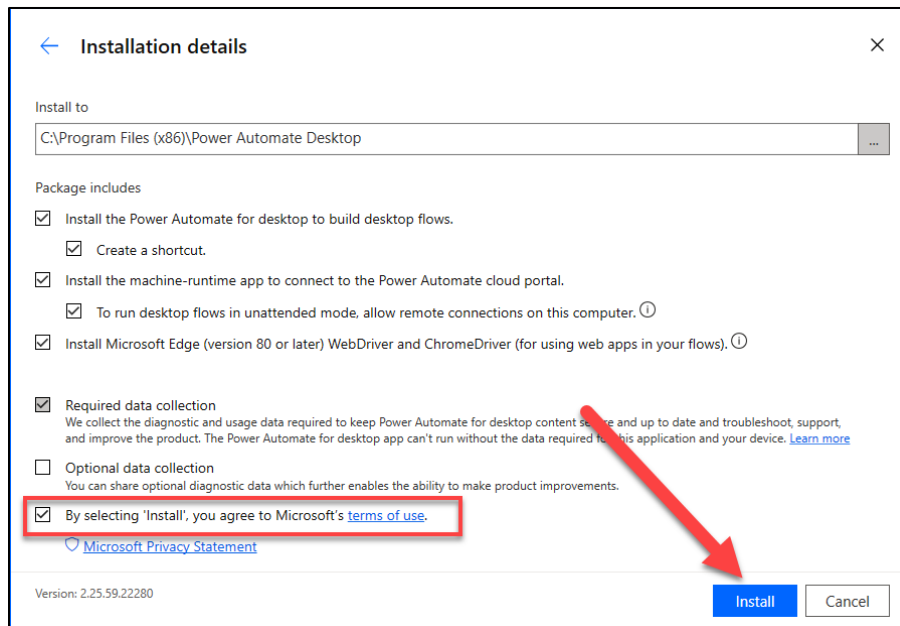
4. Once the download completes, select the exe file to open and run the installer: Setup.Microsoft.PowerAutomate.exe



5. Within the **Install Power Automate package** dialog, select the **Next** button.



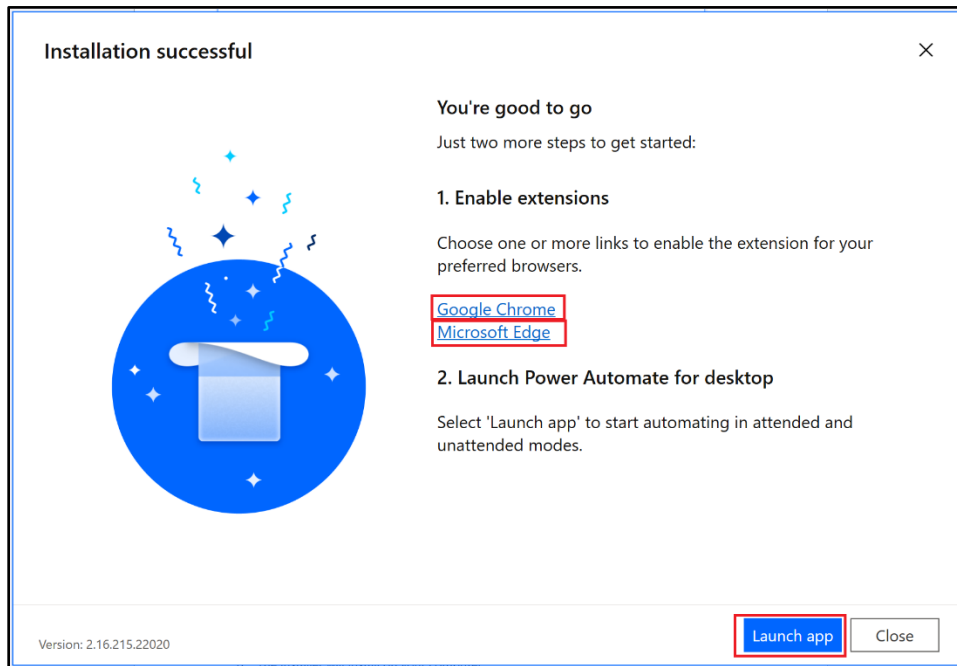
6. Select the checkbox to agree to Microsoft's terms of use then select the **Install** button.



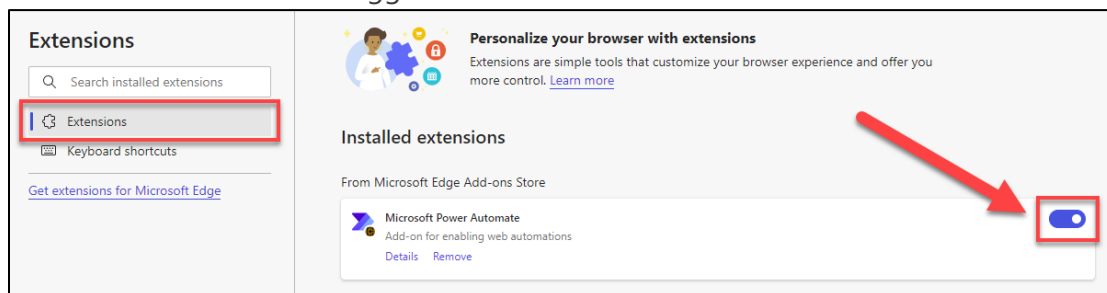
**Note:** If you are asked about allowing this app to make changes to your computer, select **Yes**.

6. The installer will install on your computer:
- Power Automate for desktop app
  - Power Automate for desktop browser extension for Edge Chromium and Google Chrome
  - Power Automate machine-runtime management app

7. After the installation is finished, select the **hyperlinks** in step 1 within the dialog box to navigate to a chosen browser(s) to enable **Power Automate for desktop extensions**. After your extensions have been configured, you can **launch Power Automate for desktop** in step 2 within the dialog box.



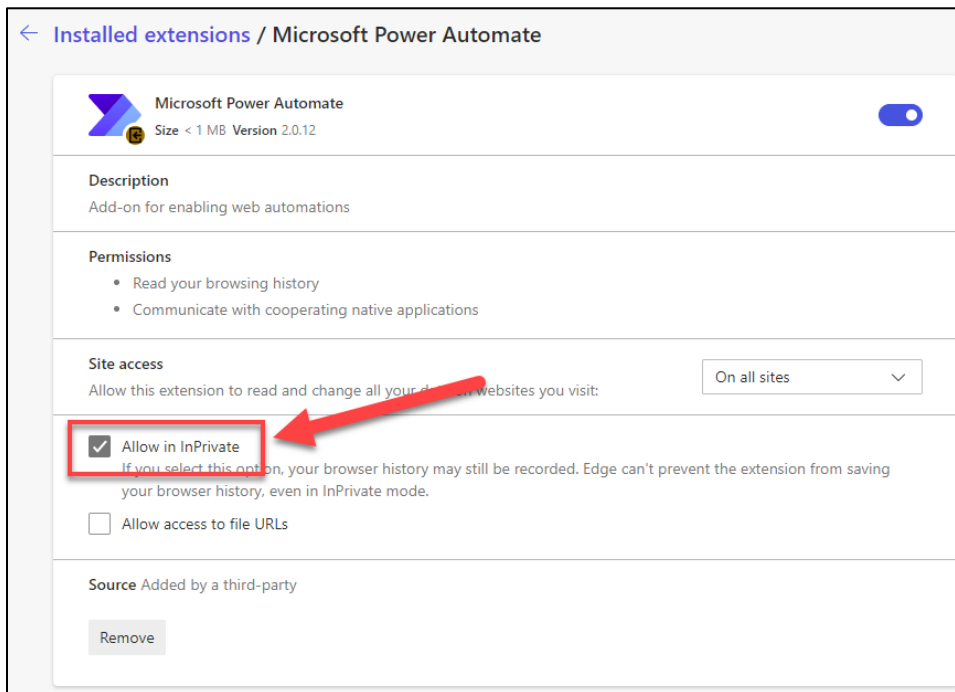
8. **If you don't see this prompt**, you can still manually enable the extension. Depending on what browser you are using, please follow the steps below to confirm the extension is enabled:
- Enable in Microsoft Edge (Chromium)
    - Open <edge://extensions> URL in the Edge (Chromium) browser
    - Find the **Microsoft Power Automate** extension.
    - Switch the toggle button to **enable extension**.



iv. Select **Details**.

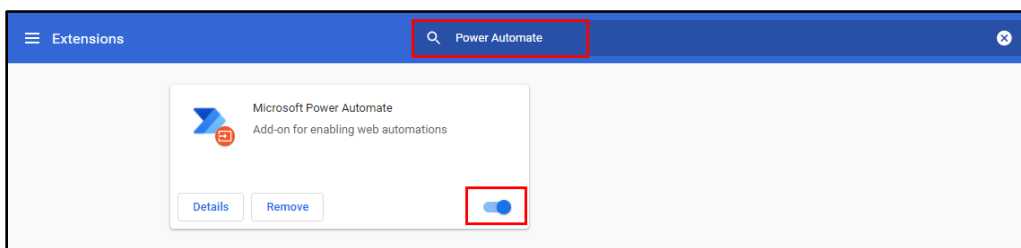


v. Check the **Allow in InPrivate** checkbox.

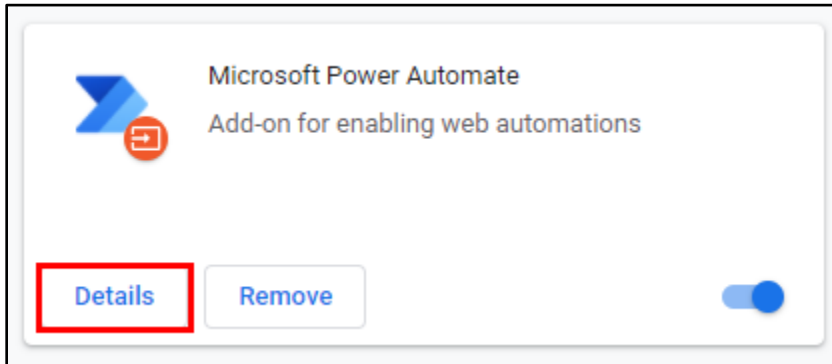


b. Enable in Google Chrome

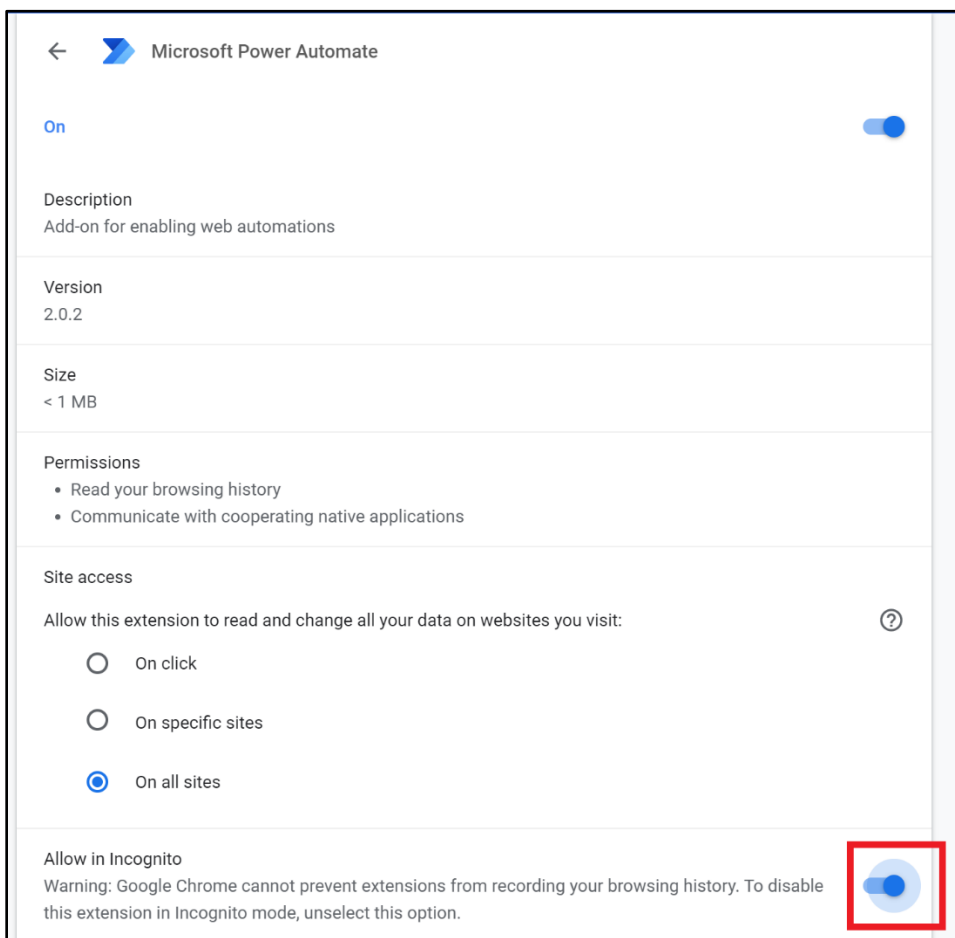
- i. Open <chrome://extensions> URL in the Chrome browser.
- ii. Find the **Microsoft Power Automate** extension.
- iii. Switch the toggle button to **enable extension**.



iv. Select Details.

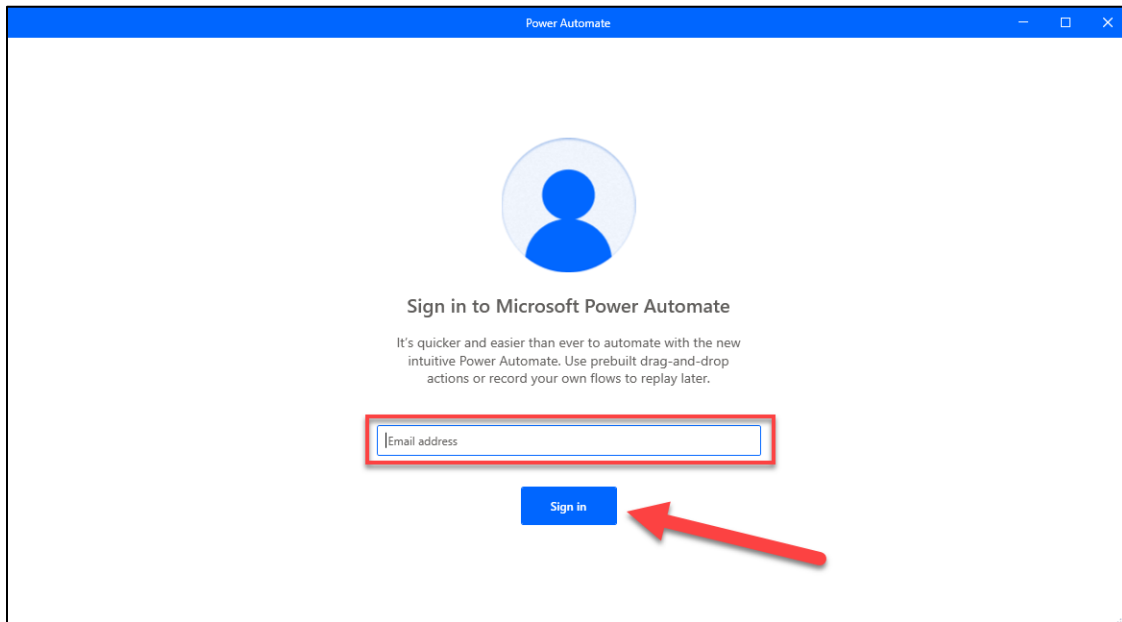


v. Switch the toggle button for **Allow in Incognito** to be on

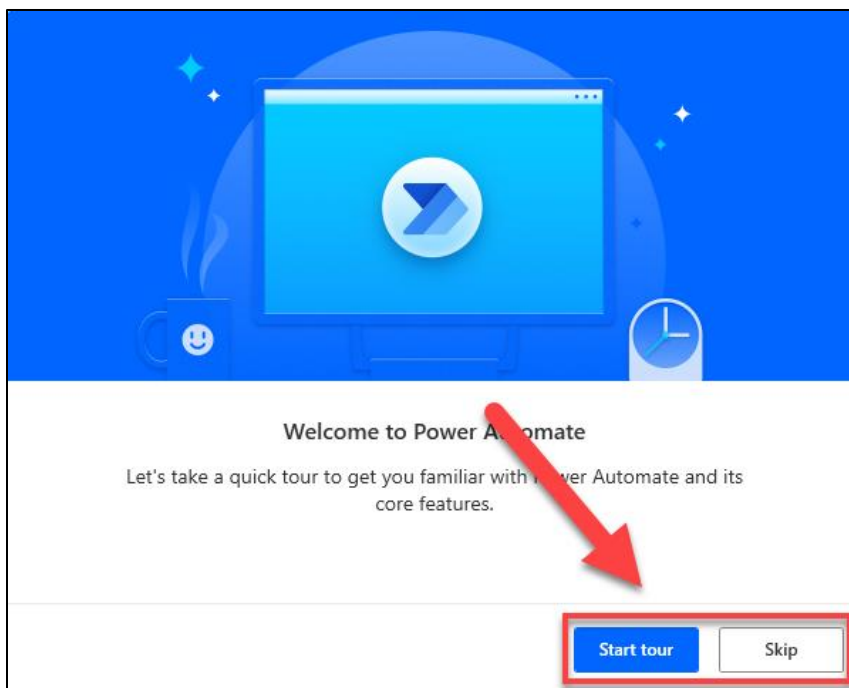




9. Next, launch **Microsoft Power Automate** on your desktop (PAD). In the opened window, enter the email address of the account you are using for the labs and select **Sign in**.



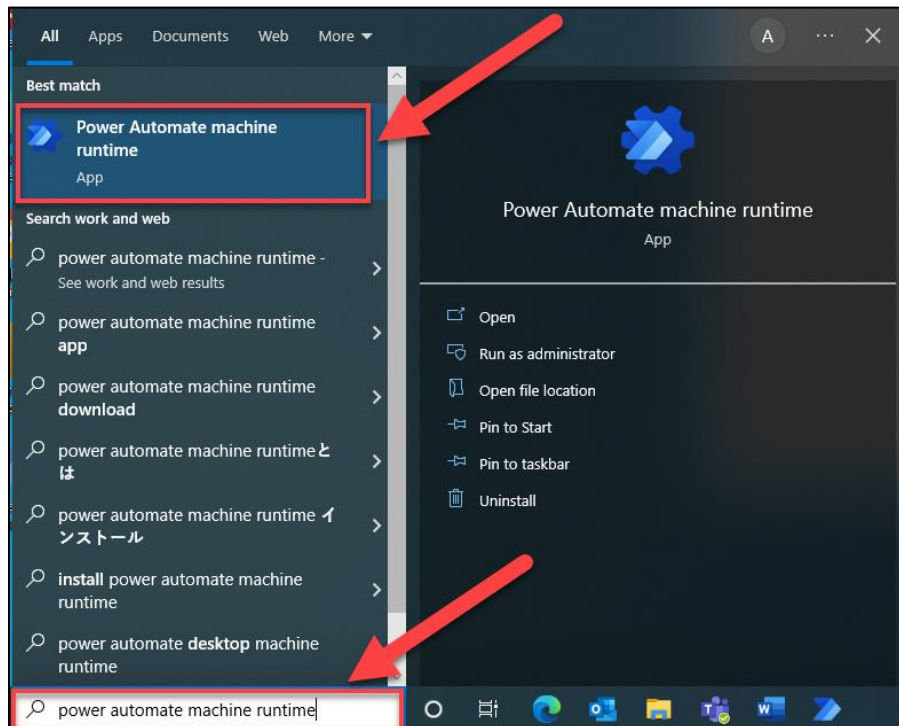
10. If you are logging into PAD for the first time, you might see the tour window. You can either **follow** the tour or **skip** the tour.



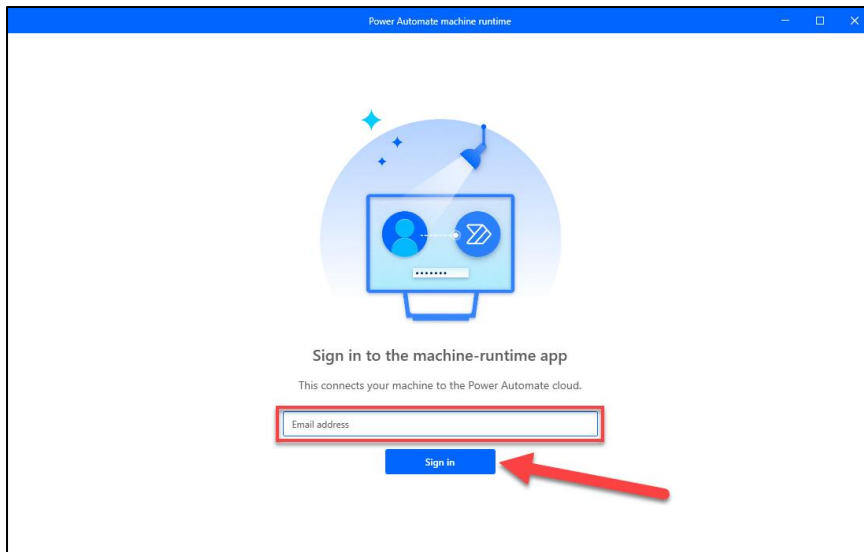
## Register machine

**Note:** If you have not previously registered your machine to another environment, Power Automate Desktop will automatically register your machine to the default environment at the installing time, so you do not need to do the following steps manually. However, we still recommend you try to follow the steps below

11. Search for **Power Automate machine runtime** from the Windows search bar at the bottom of your desktop.
12. Select the **Power Automate machine runtime** app.

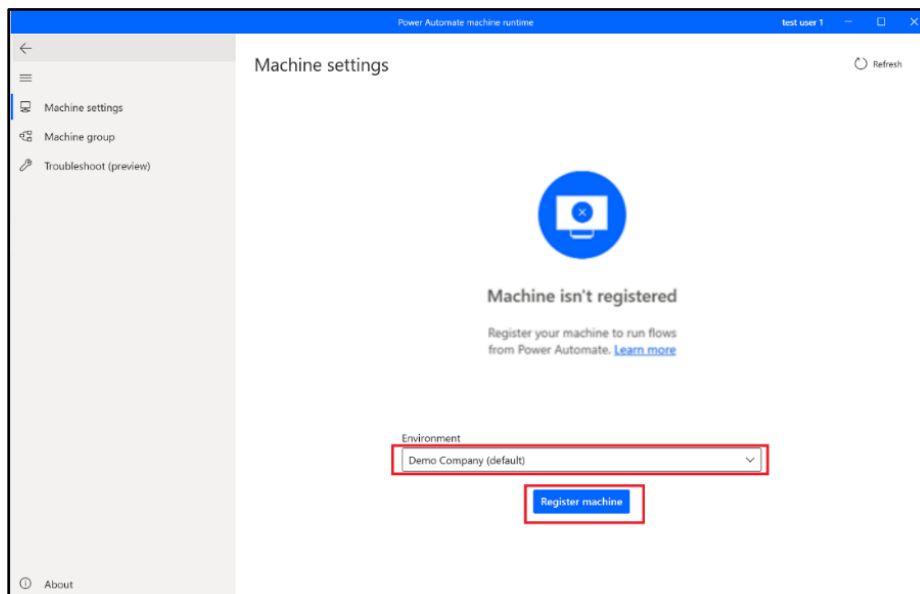


13. This will open the **Power Automate machine runtime** app. Please go ahead and **sign in** using the tenant account.



After logging in, you will see the screen below asking you to register your machine:

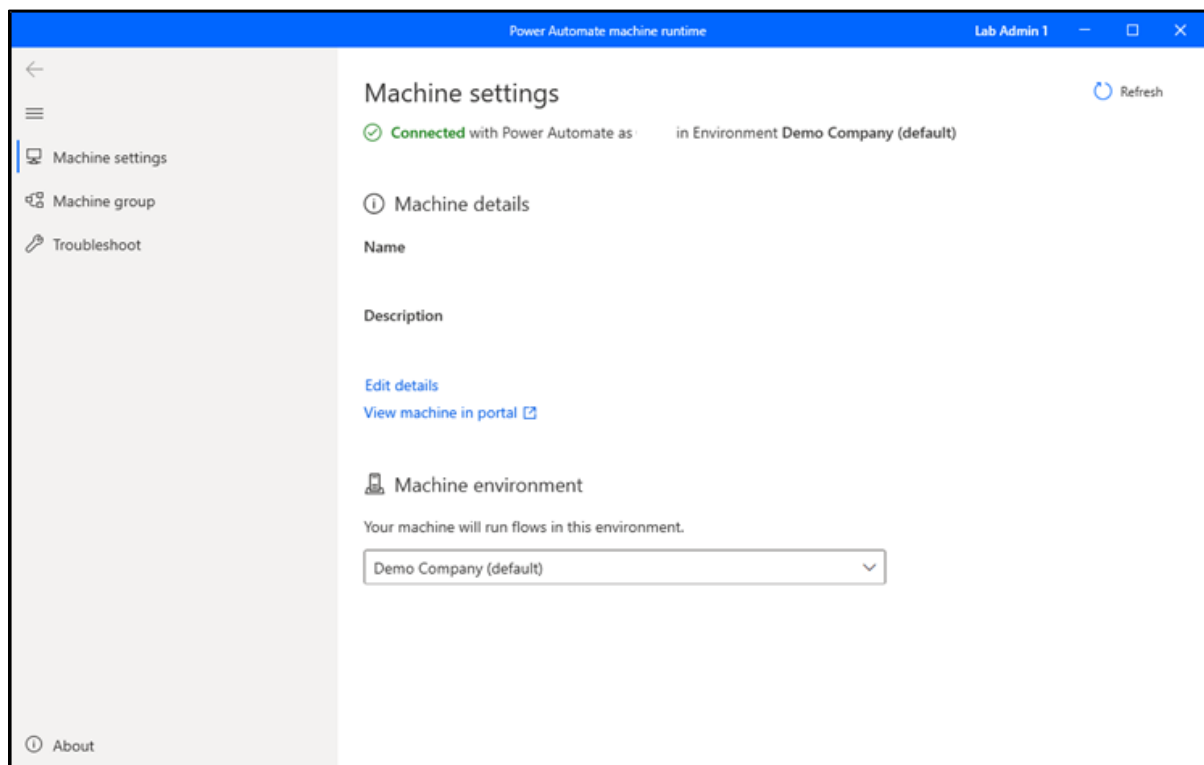
**Note:** If the machine has been auto registered for you, you will not see the screen below to register machine, instead you will see the screens in step #15. In that case, you can skip step #14.



14. You can select the **Register machine** button to register this machine to the default environment. If you have multiple environments and want to register this machine to a different environment than the default environment, you can use the **Environment dropdown** menu to select the desired **environment** then select **register**.

**Note:** Power Automate will only allow the cloud flows in the registered environment to trigger desktop flows to run on this machine.

15. After registering successfully, you will see this information in the machine runtime app:



16. In the future, you can also use the **Machine group** settings to add more machines to one machine group and manage them together. You can learn more information about machine groups here: [Manage machine groups](#)

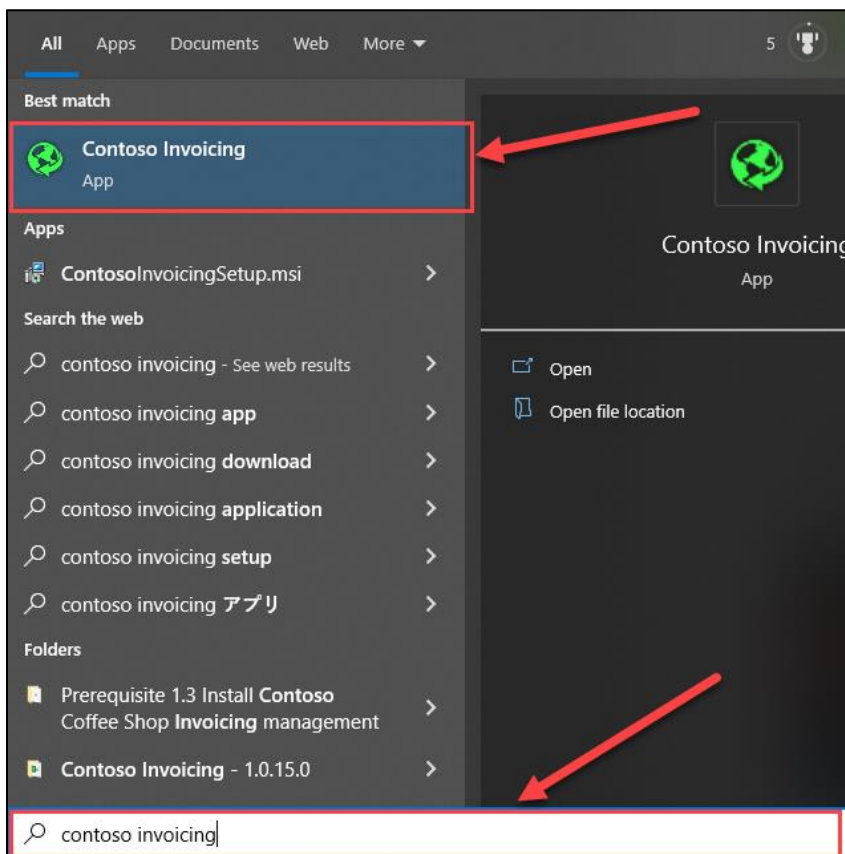
**Note:** Users will need either an Environment Maker or desktop Flow Machine Owner role permission to register machines. Before registering a machine, make sure that you have the required permissions, and there is an available environment to register the new machine in.

## Install the Coffee Shop Contoso Invoice App (for lab scenario use)

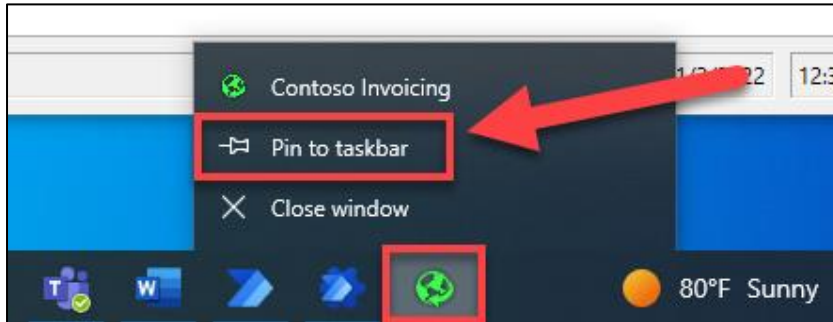
1. In the lab, we will be using a Coffee shop company business scenario to see how we can automate their manual invoice processing steps using Power Automate desktop flow and cloud flows. This Coffee shop company is using a Win32 Windows application to manually manage their invoice system. First, let's **download** and **install** this application to prepare for the lab.
2. Download both **ContosoInvoicingSetup.exe** and **ContosoInvoicingSetup.msi** from the prerequisite lab #1 folder inside the **lab data packages**. Double-click the exe file to install the invoicing management application.

**Note:** You will need to select **More Information** and **Run it anyway** during the installation of the Contoso app if Windows Defender prompts that the app is coming from an untrusted source.

3. After the installation is fully completed, launch the **Contoso Invoicing app** from the Start menu using the search bar at the bottom of your desktop. Within the search bar, type **Contoso Invoicing**.

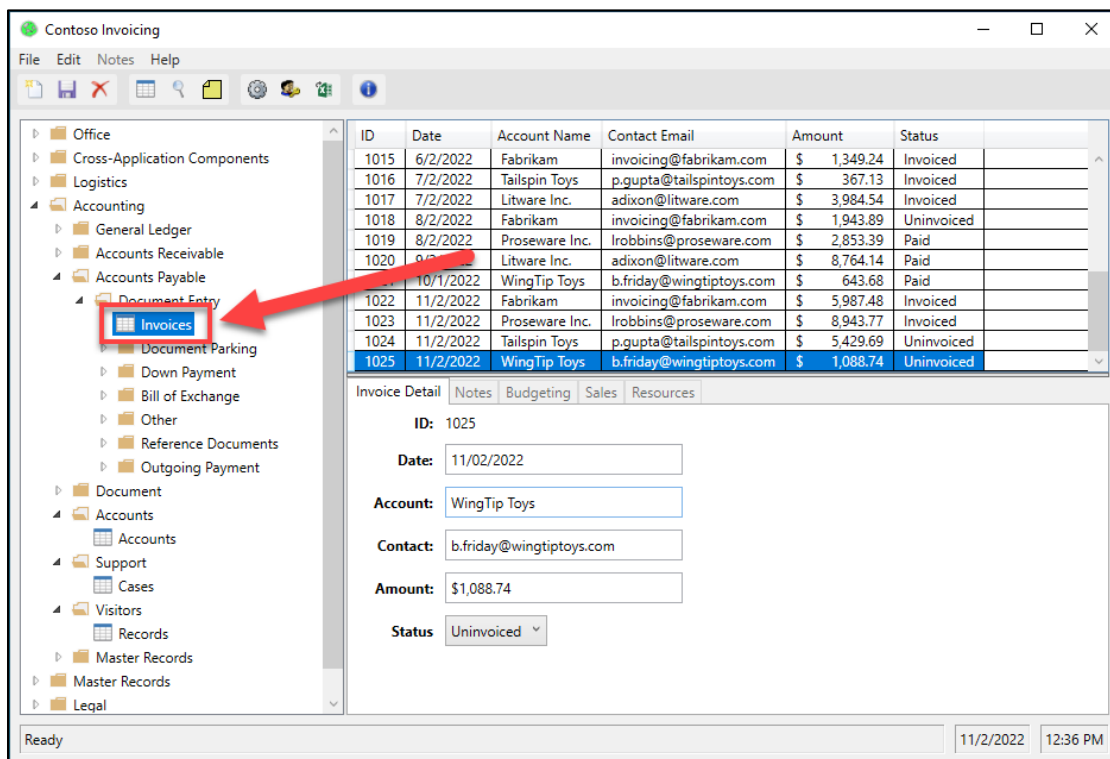


4. Right-click on the app icon located in the task bar at the bottom of your desktop and select the option to **pin** the app icon to the **task bar** for quick launch. We will use this app in many of the following labs, both for the Process advisor and Robotic Processing Automation recordings.

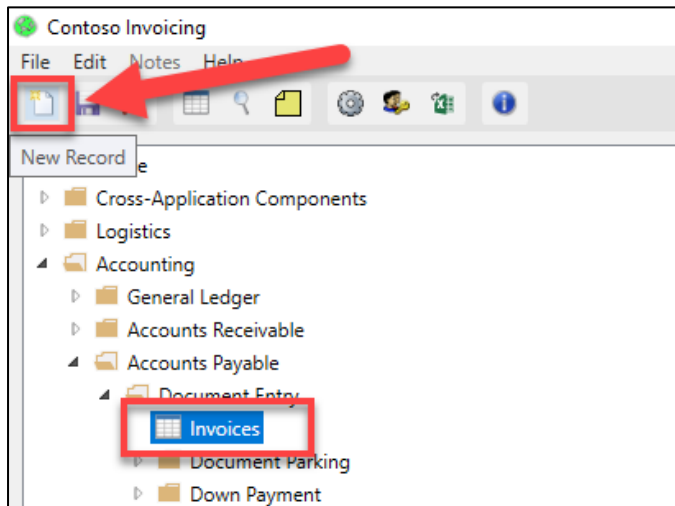


5. Now, let's spend some time getting familiar with the Contoso Invoicing App. We will look into how the Contoso Coffee shop employee usually manually enters a new invoice record into the company application system when there is a new invoice being received. This will help you better prepare for the following lab exercises

- i) With the **Contoso Invoicing App** open, select **Invoices** from the pane to the left of the screen.



- ii) Select the **New record icon** from the ribbon at the top left corner of the screen to create a new invoice.



- iii) You can **fill in any information** for the new invoice in the text boxes that appear in the center of the screen

For this example, we input the following information:

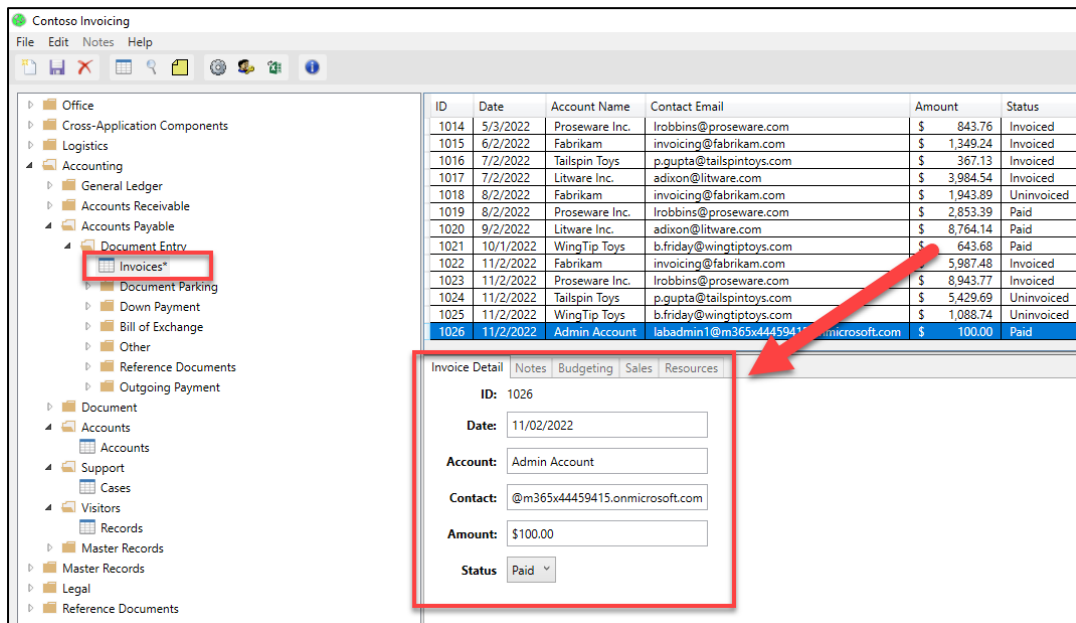
Date: (current date)

Account: Admin Account

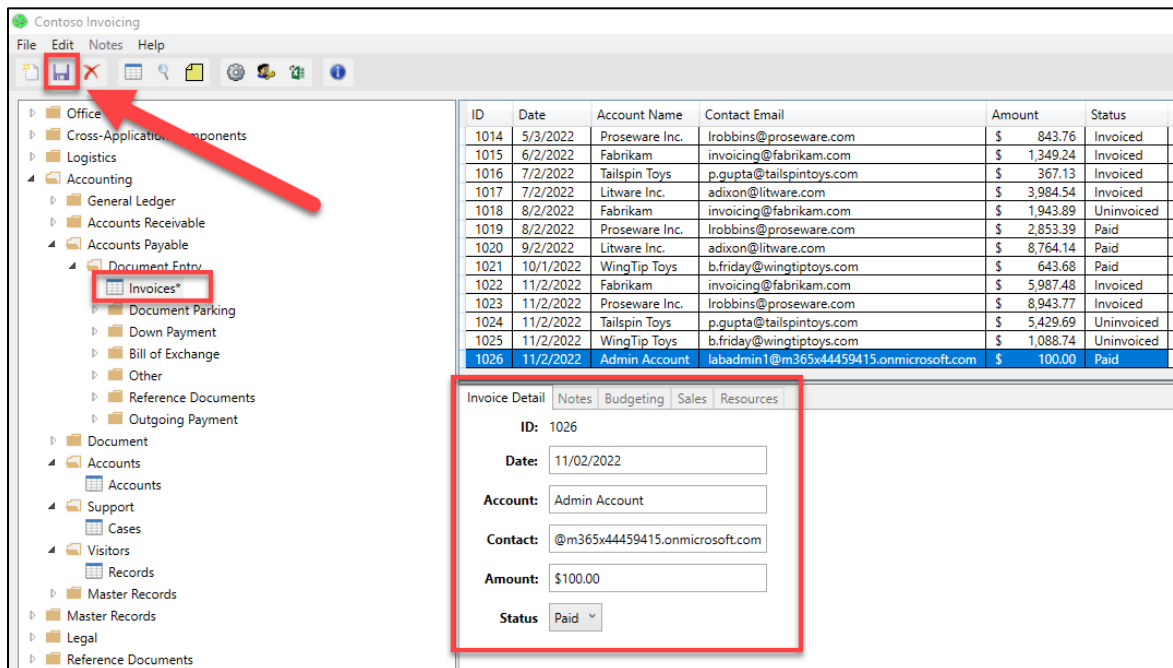
Contact: (email we used to login to the accounts)

Amount: \$100.00

Status: Paid



- iv) Select the **Save** icon button from the ribbon at the top left corner of the screen to save your new invoice



ID	Date	Account Name	Contact Email	Amount	Status
1014	5/3/2022	Proseware Inc.	lrobbins@proseware.com	\$ 843.76	Invoiced
1015	6/2/2022	Fabrikam	invoicing@fabrikam.com	\$ 1,349.24	Invoiced
1016	7/2/2022	Tailspin Toys	p.gupta@tailspintoys.com	\$ 367.13	Invoiced
1017	7/2/2022	Litware Inc.	adixon@litware.com	\$ 3,984.54	Invoiced
1018	8/2/2022	Fabrikam	invoicing@fabrikam.com	\$ 1,943.89	Uninvoiced
1019	8/2/2022	Proseware Inc.	lrobbins@proseware.com	\$ 2,853.39	Paid
1020	9/2/2022	Litware Inc.	adixon@litware.com	\$ 8,764.14	Paid
1021	10/1/2022	WingTip Toys	b.friday@wingtiptoy.com	\$ 643.68	Paid
1022	11/2/2022	Fabrikam	invoicing@fabrikam.com	\$ 5,987.48	Invoiced
1023	11/2/2022	Proseware Inc.	lrobbins@proseware.com	\$ 8,943.77	Invoiced
1024	11/2/2022	Tailspin Toys	p.gupta@tailspintoys.com	\$ 5,429.69	Uninvoiced
1025	11/2/2022	WingTip Toys	b.friday@wingtiptoy.com	\$ 1,088.74	Uninvoiced
1026	11/2/2022	Admin Account	labadmin1@m365x44459415.onmicrosoft.com	\$ 100.00	Paid

Invoice Detail | Notes | Budgeting | Sales | Resources

ID: 1026

Date: 11/02/2022

Account: Admin Account

Contact: @m365x44459415.onmicrosoft.com

Amount: \$100.00

Status: Paid

Congratulations! Now you have completed all the pre-requisites and understand how an invoice record is manually processed by the Contoso Coffee shop employee. You are now ready for the labs to automate the whole process using Power Automate.



Information in this document, including URL and other Internet Web site references, is subject to change without notice. Unless otherwise noted, the example companies, organizations, products, domain names, e-mail addresses, logos, people, places, and events depicted herein are fictitious, and no association with any real company, organization, product, domain name, e-mail address, logo, person, place or event is intended or should be inferred. Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Microsoft Corporation.

Microsoft may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document. Except as expressly provided in any written license agreement from Microsoft, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

The names of manufacturers, products, or URLs are provided for informational purposes only and Microsoft makes no representations or warranties, either expressed, implied, or statutory, regarding these manufacturers or the use of the products with any Microsoft technologies. The inclusion of a manufacturer or product does not imply endorsement of Microsoft of the manufacturer or product. Links may be provided to third party sites. Such sites are not under the control of Microsoft and Microsoft is not responsible for the contents of any linked site or any link contained in a linked site, or any changes or updates to such sites. Microsoft is not responsible for webcasting, or any other form of transmission received from any linked site. Microsoft is providing these links to you only as a convenience, and the inclusion of any link does not imply endorsement of Microsoft of the site, or the products contained therein.

© 2023 Microsoft Corporation. All rights reserved.

Microsoft and the trademarks listed at <https://www.microsoft.com/enus/legal/intellectualproperty/Trademarks/Usage/General.aspx> are trademarks of the Microsoft group of companies. All other trademarks are the property of their respective owners.