Microsoft

Robotic Process Automation in a Day

Lab 2 – Create your first desktop flow

30 mins

February 2023

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Lab Overview

In the previous lab you have gained insights and identified the bottleneck steps of the manual invoice processing procedure in the Contoso Coffee shop company. Now you are ready to use Power Automate desktop flows to start automating some of the processes to increase productivity and efficiency. You will complete the following tasks in this lab:

- Getting familiar with Power Automate desktop flows
- Create a new desktop flow
- Record actions performed in the desktop-installed Contoso Invoicing application
- Perform a test run of the new desktop flow

Prerequisites

This lab builds on the initial setup lab (Lab 1) – ensure all tasks are complete.

Important Additional Prerequisite: As you will be recording actions performed in your UI in this lab, **the best experience is if you view the lab instructions on a separate device or in a printout**. You can still complete the lab while using the instructions during UI action recording, but you will have to perform extra work to cut the recorded actions of viewing the instructions from the desktop flow.

Also please check the known OS requirements and limitations here for desktop flows https://learn.microsoft.com/en-us/power-automate/desktop-flows/setup

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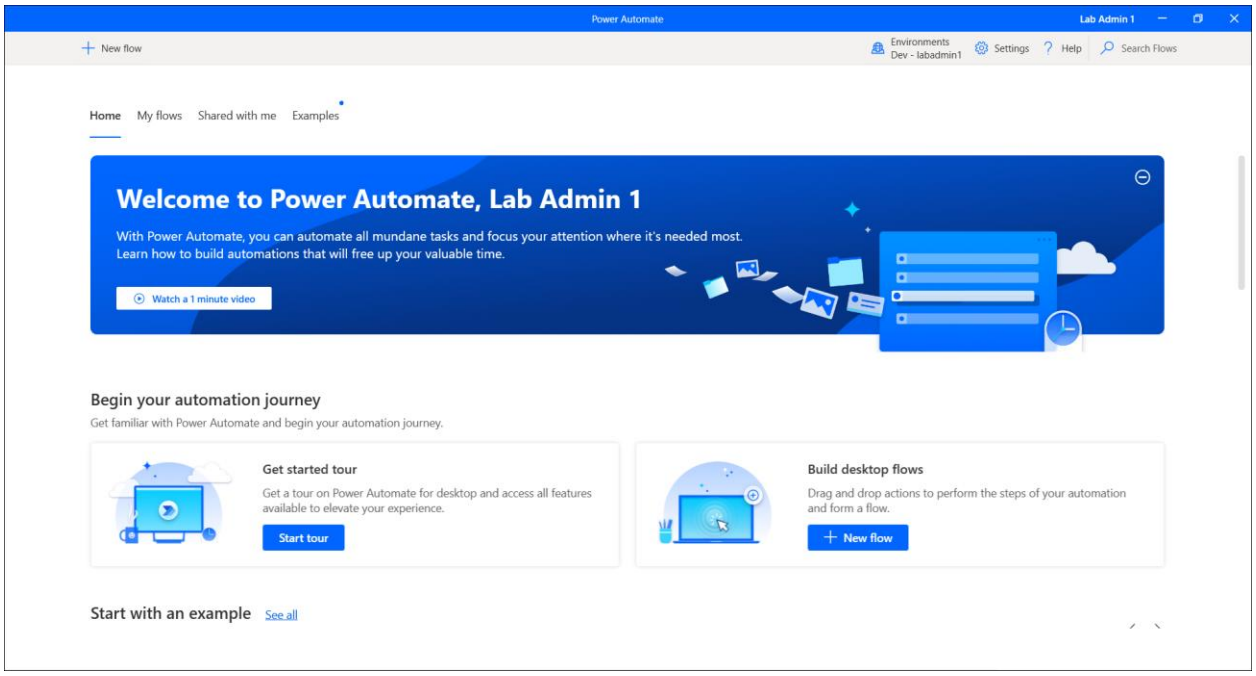
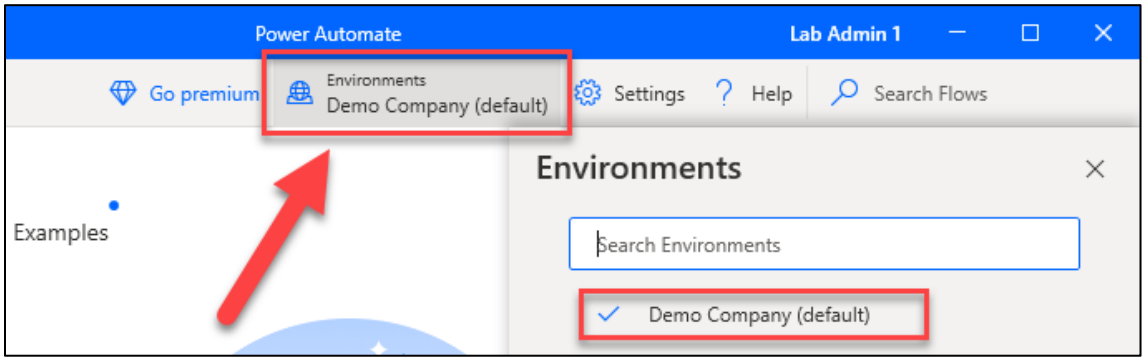
Getting Familiar with Power Automate for desktop

Note: Please complete Lab 1 Prerequisite - Install required software the latest version of Power Automate for desktop.

1. Let's first get familiar with the Power Automate for desktop app. Launch the Power Automate for desktop app from your computer and sign into your account.



2. Select the **Environments** drop-down, located at the top of the page, to change your environment to the appropriate one. This will be the same environment that was created as part of the prerequisites.



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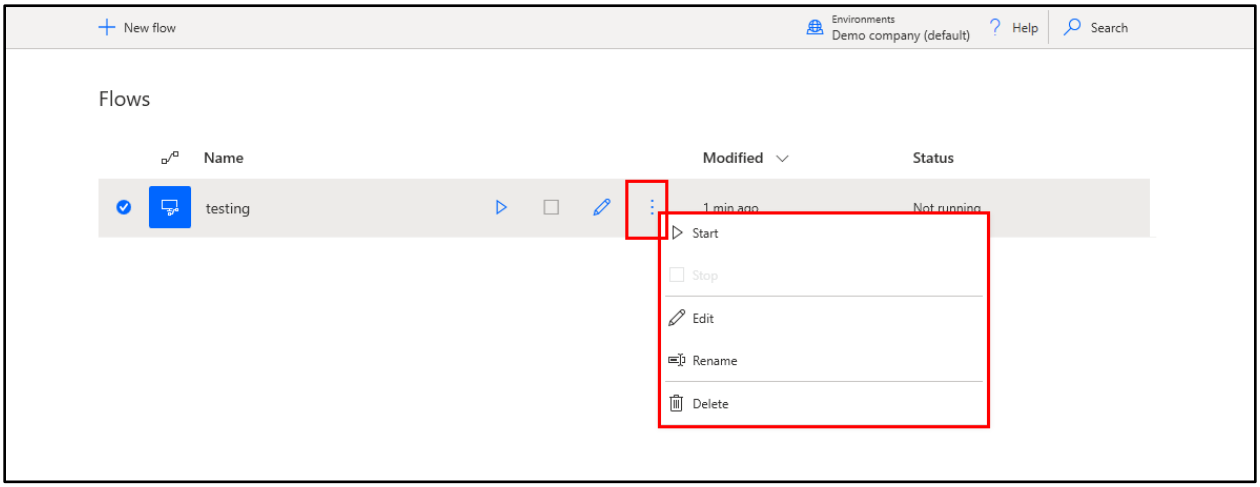
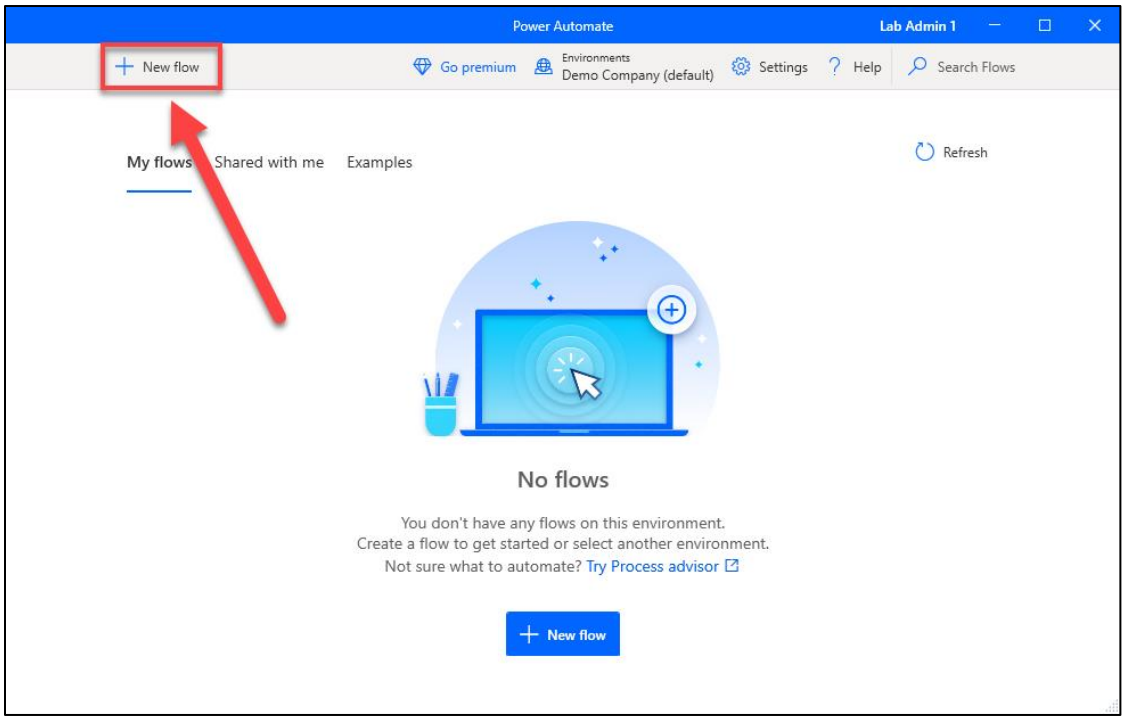
3. If you have any existing Power Automate desktop flow, you can select the **ellipses** (**...**) icon to Start, Edit, Rename or Delete the flow. If not, that is ok, as we will create one in the next step.



4. Now let's select the **+New flow** button at the top of the page to create a new Power Automate desktop flow.



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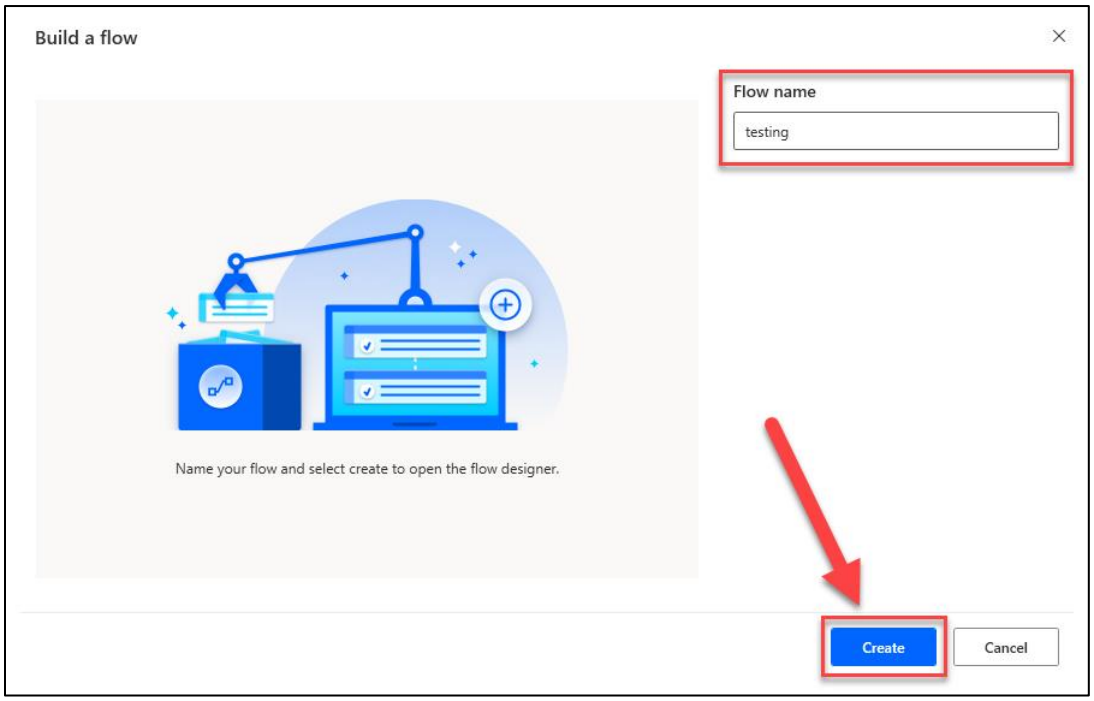
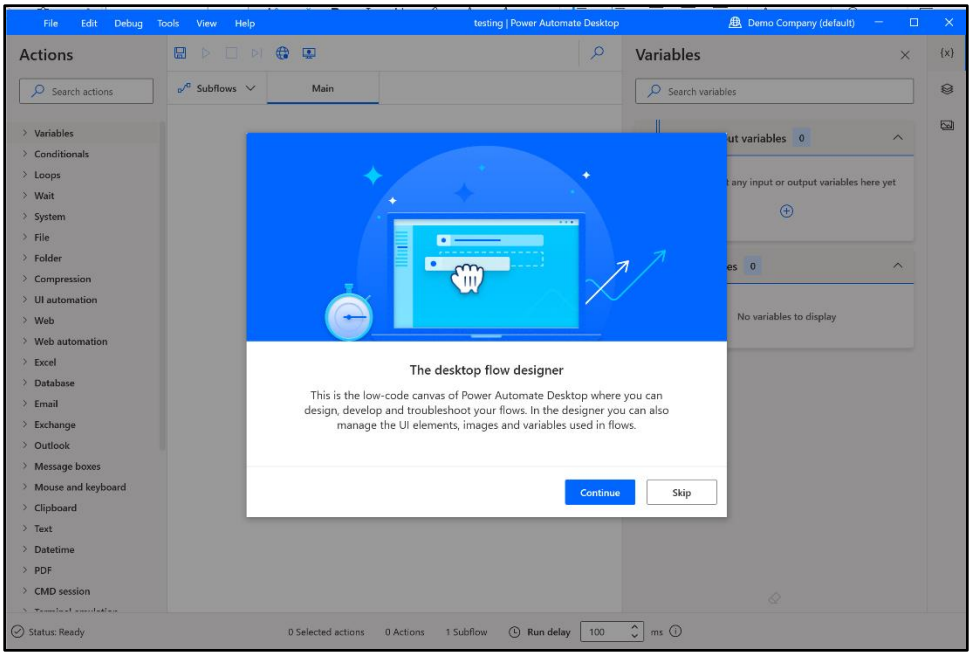
5. Within the Build a flow dialog window, to the right, name the new flow **testing** and then, in the bottom right corner of the dialog, select **Create**.



6. You might be seeing a tour box if this is the first time you have logged in. You can continue the tour or skip the tour.



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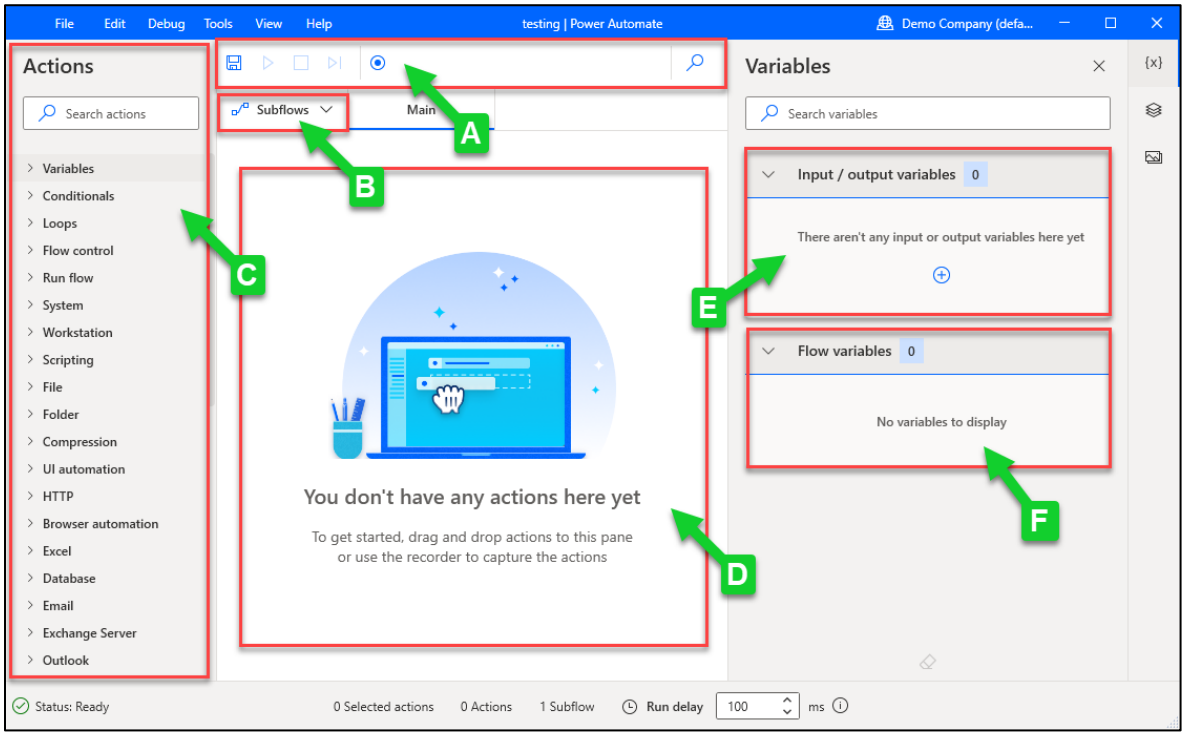
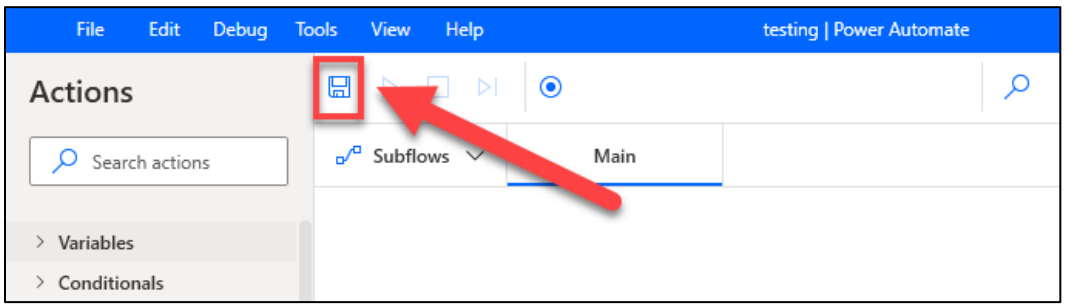
7. Next, you will see the Power Automate for desktop designer which consists of the following toolbars and panes:

   A. **The toolbar** - Contains basic operations for use with actions (Save, Undo, Copy, Debug and Paste) as well as button to start the Recorder and control the process execution (Start/Pause/Stop).
   B. **Subflows** – Allows you to create subflows under your main flow.
   C. **Actions pane** - Contains all Power Automate for desktop Actions and includes a search bar that assists in finding specific actions by matching the action name to the text string.
   D. **Workspace** – Contains all the actions added to the process so far. Functions are separated into tabs.
   E. **Input/output variables** - Contains all the variables you created in the process.
   F. **Flow variables** - List of all variables used in the process.



8. From the tool bar at the top of the screen, select **Save**.



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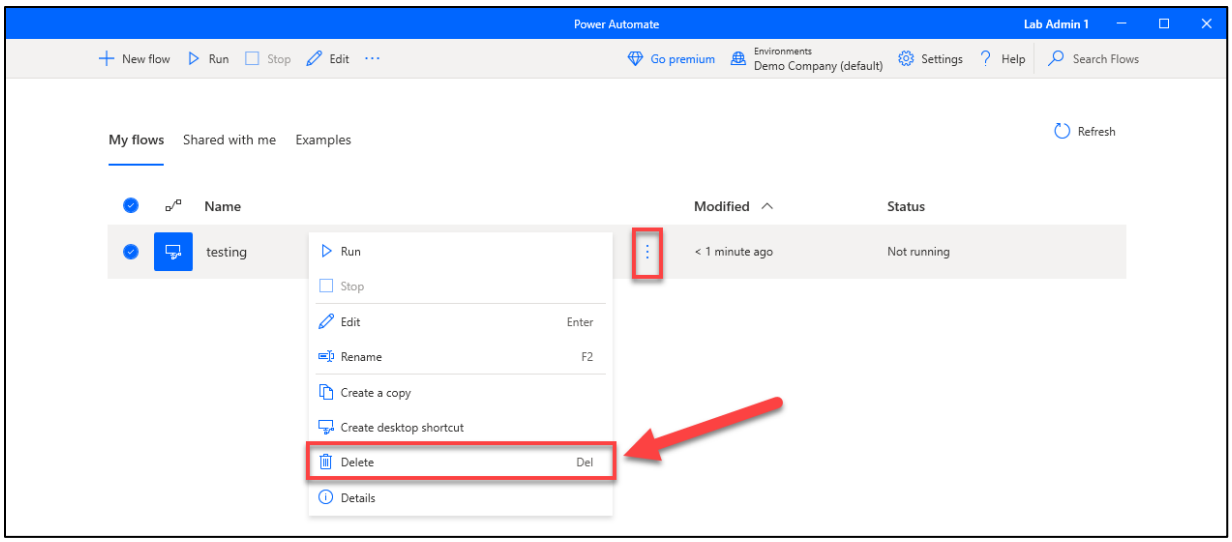
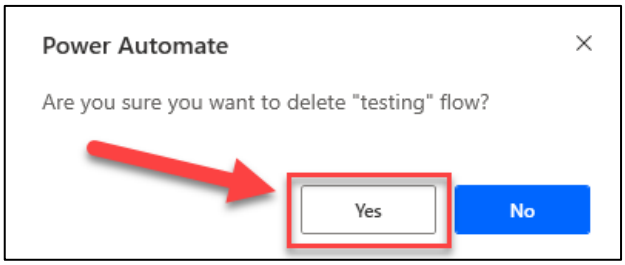
9. **Close** out of the testing flow you created.
10. Select the ellipses (...) to the right of the flow, then select **Delete** to delete the testing desktop flow.



11. Select **Yes** to confirm the deletion.



12. **Close** out of the Power Automate application.

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Create your first Power Automate desktop flow

Note: If you haven't, please complete Lab 1 download and install the ContosoInvoicingSetup from the **lab data packages folder**. Pin the app icon to the task bar for quick launch. We will use this app for the recording.
Note: You will need to select "More Information" and "Run it anyway" during installation of the Contoso app if Windows Defender prompts that the app is coming from an untrusted source. This is normal and doesn't expose any risk.

1. Now you are more familiar with Power Automate for desktop app, we will go ahead to create a desktop flow that can help Contoso Coffee shop to enter invoice information into the desktop management system. In the task above, we have shown you how you can create a desktop flow from within the Power Automate for desktop app directly. Now we will also show you another path where you can create and manage desktop flows from the browser side.
2. Open a new web browser and navigate to https://powerautomate.microsoft.com then log in using your test account; the same account that you have been using previously in the labs.

Note: For this workshop, please don't use the flows tab from powerapps.com.

3. If this is the first time you are logging into this site, you will need to choose your country/region, then select the **Get started** button.

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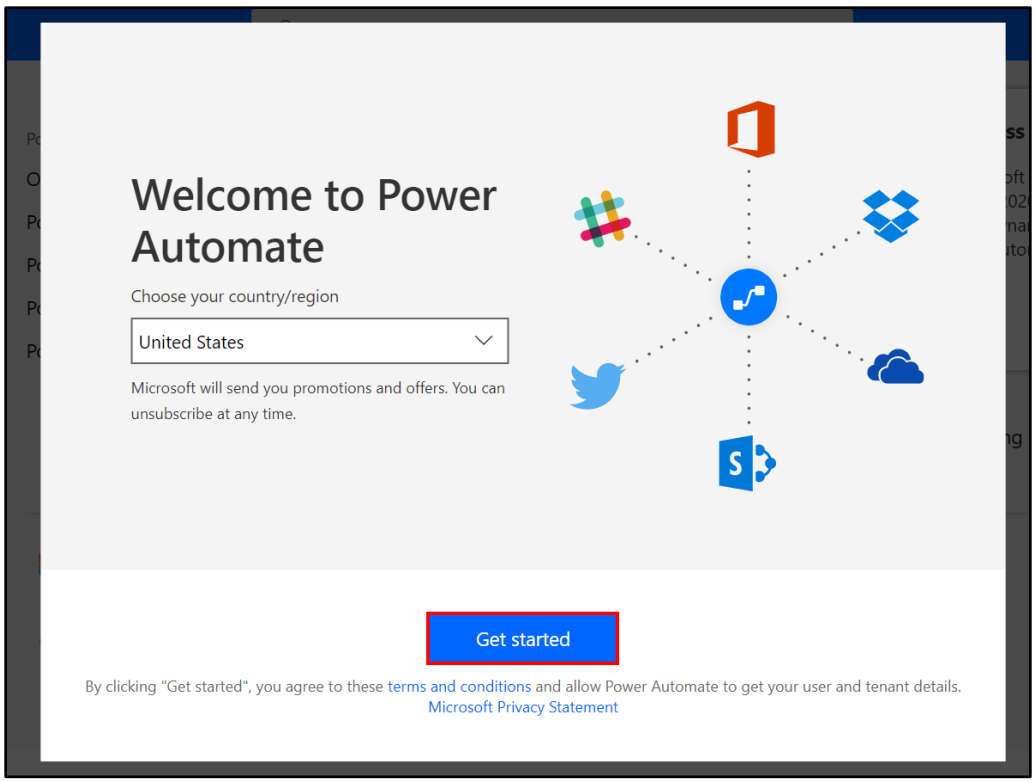
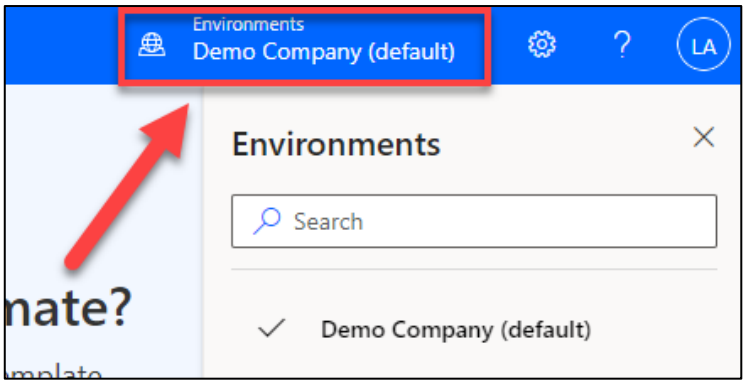


Note: Please make sure you have selected the correct environment (with database) to use for the labs. You can switch between different environments by selecting the Environments button in the title bar.



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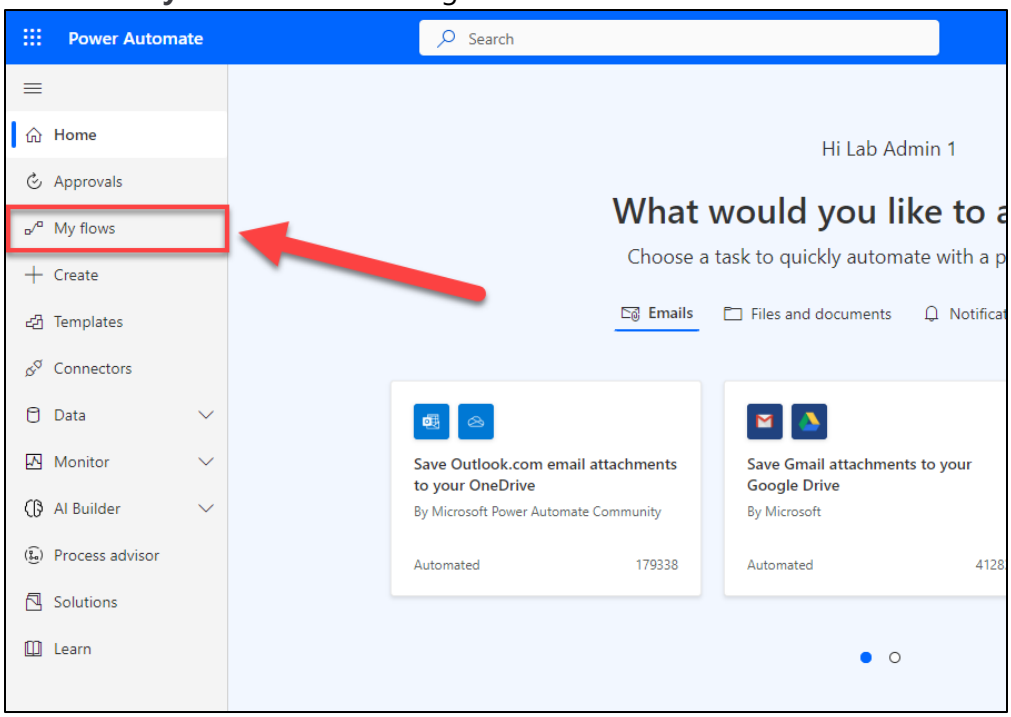
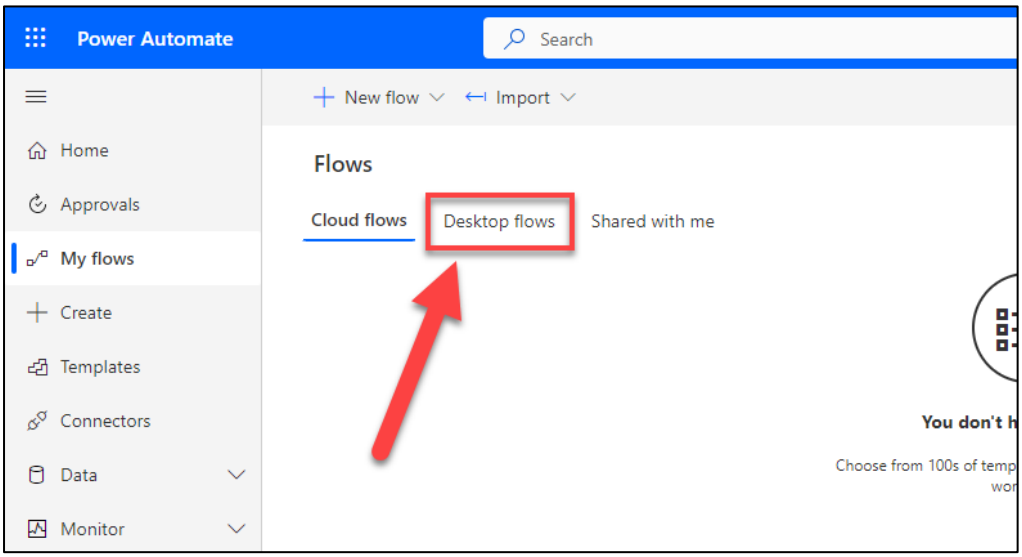
4. Select **My flows** from the navigation menu to the left.



5. At the top of the screen, select the **Desktop flows** tab.



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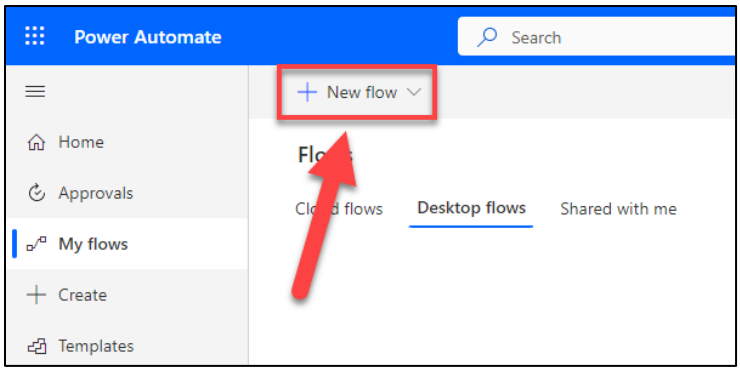
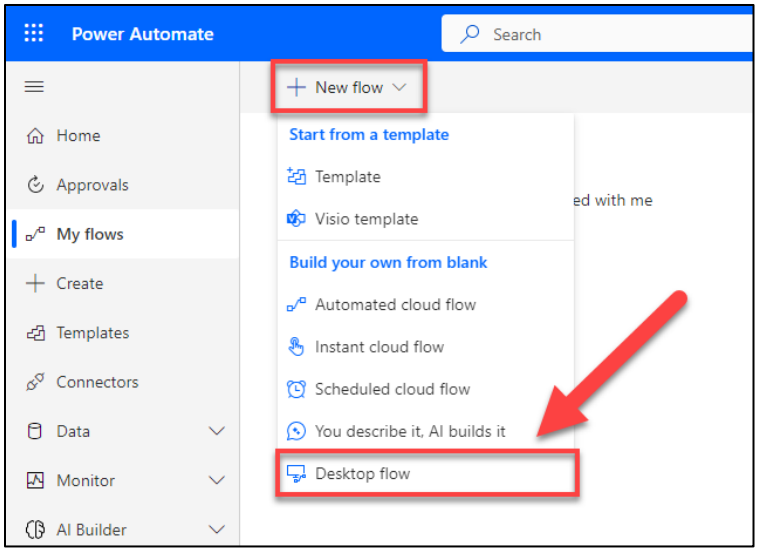
6. At the top of the screen, select the **+ New flow** drop-down.



7. From the New flow options list, select **Desktop flow.**



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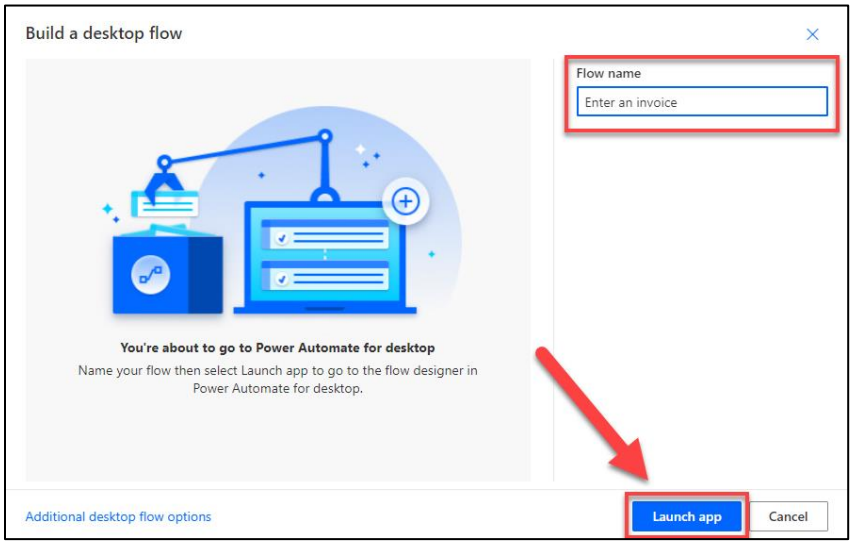
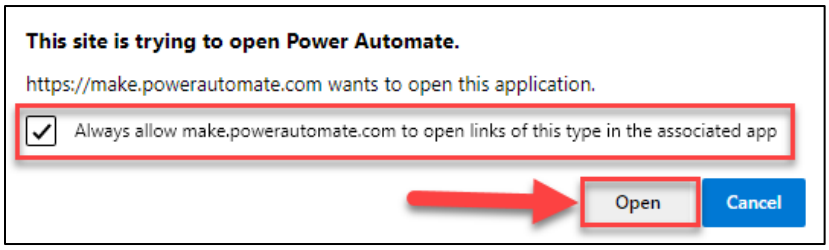
8. In the **Build a desktop flow** dialog box, name the new flow **Enter an invoice**, then select the **Launch app** button at the bottom of the dialog.



9. If you are presented with a dialog that wants to open Power Automate, check the box next to **Always allow**, then, select **Open** to open the Power Automate for desktop app.



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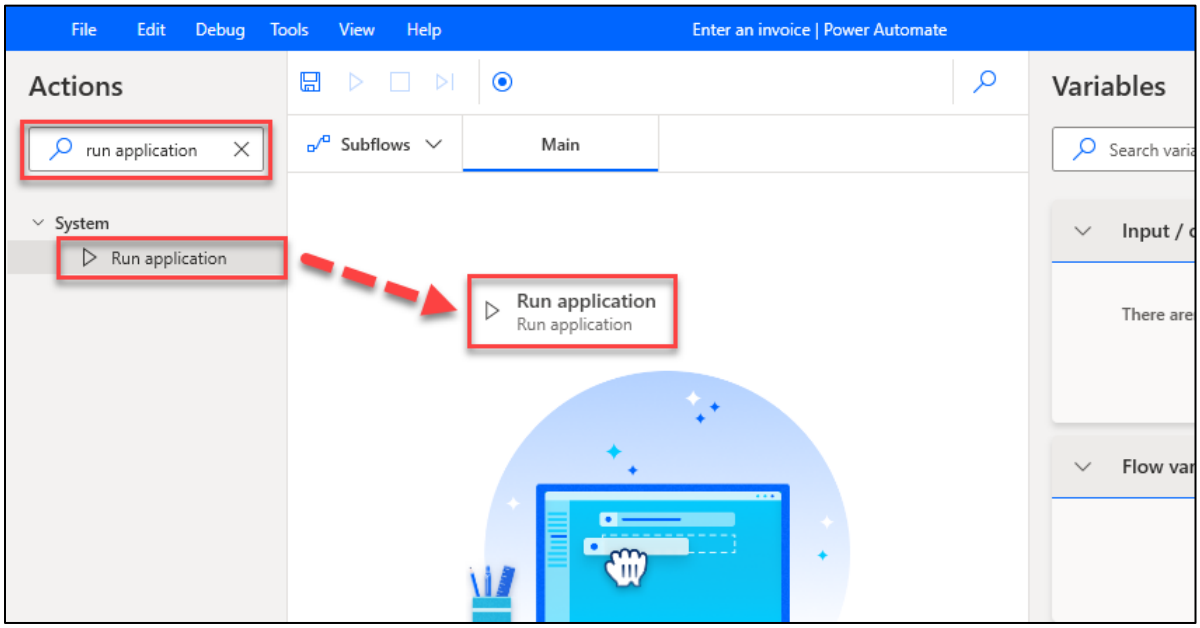
10. One you are in the PAD designer, in the **search bar** in the **Actions** pane to the left of the screen, type **Run application** then drag the **Run application** action to the **design space** in the middle of the window.



11. Within the **Run application** dialog, for the **Application path parameter**, navigate and select the location path of **Contoso Invoicing app** under **Application path**. (This will open the Contoso Invoicing app when you are running your flow). Usually, it can be found under C:\Program Files (x86)\Contoso, Inc\Contoso Invoicing\LegacyInvoicingApp.exe however, it could be different on your computer.

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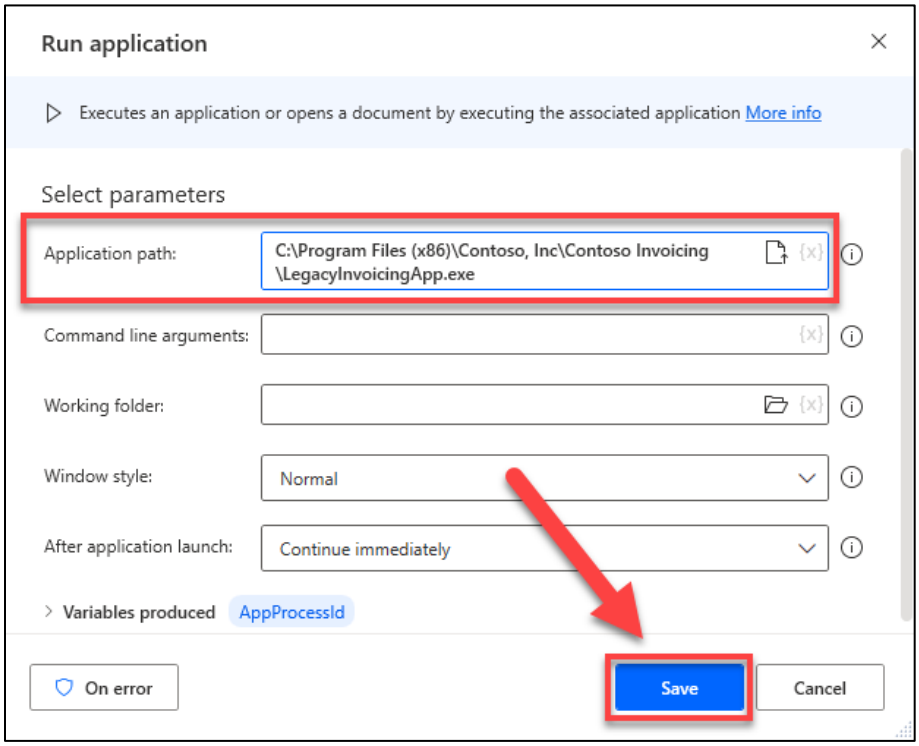
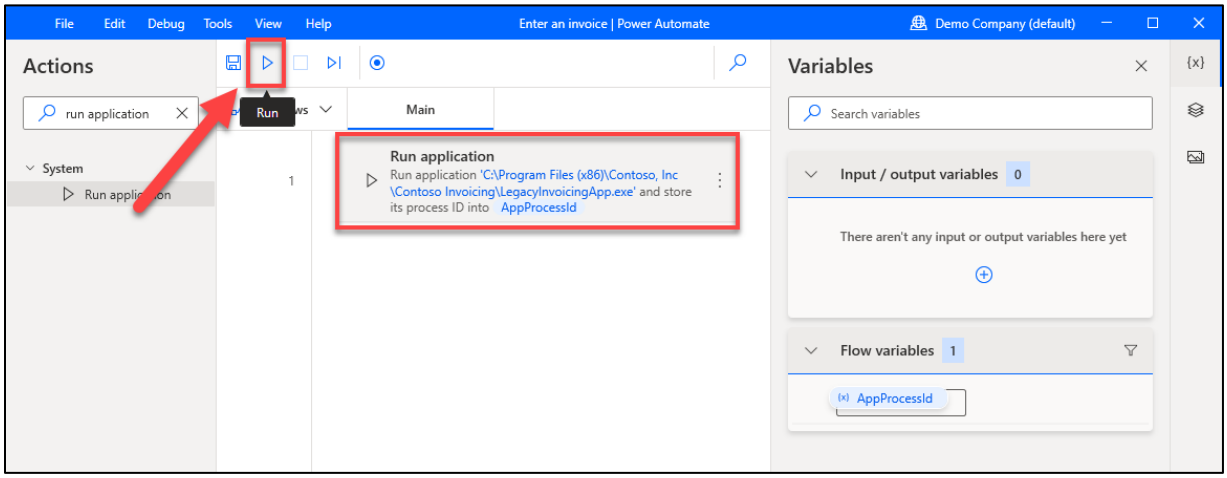
12. Then, select the **Save** button at the bottom of the dialog.



13. Now you have one action in your flow that will open the Contoso Invoicing app. You can select the **Run** button to quickly test your flow.



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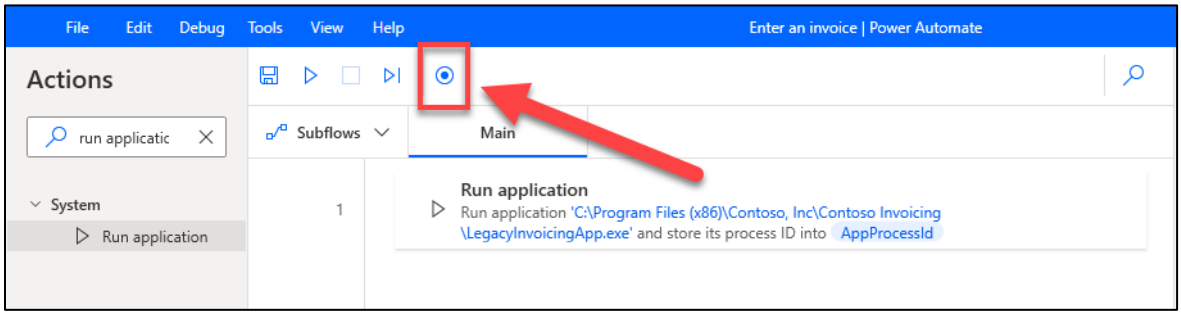
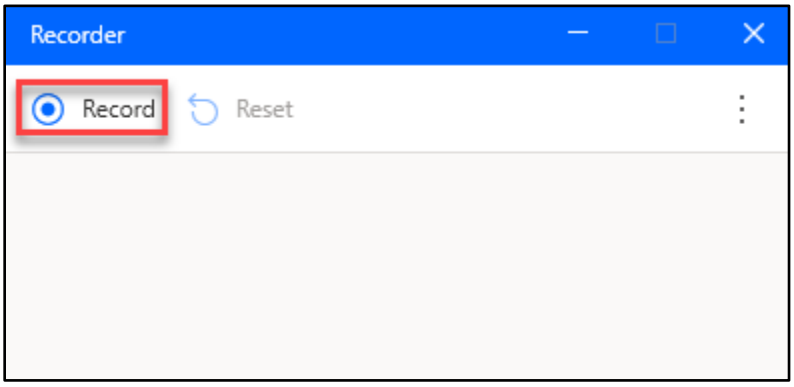
14. Minimize the **Contoso Invoicing app** manually, then select **recorder**.



Tip 1: Now we are going to start recording. It is recommended you get familiar with the steps below until the recording is done. This allows you to finish the recording in one shot without the need to go back and forth with this manually. If your first few recordings were not good, feel free to delete the recording after (using the ellipses (…) icon) and practice more until you have a good recording.

Tip 2: to help with the resilience of UI automation playbacks, it is recommended to minimize other apps from your desktop.

15. Re-open the **Contoso Invoicing app**. Then, select the **Record** button from the **Recorder** dialog window.



16. In the **Contoso Invoicing application**, select **Invoices** from the menu to the left of the window.

Tip: As your mouse hovers over controls in the app, you'll notice that a red outline highlights each control. Don't record at very fast speed and always wait a bit between each mouse move and select, until you see the blue highlight rectangle around the control first, before you select to select the control. If the red highlight did not show up before you select, the action might not be recorded properly.

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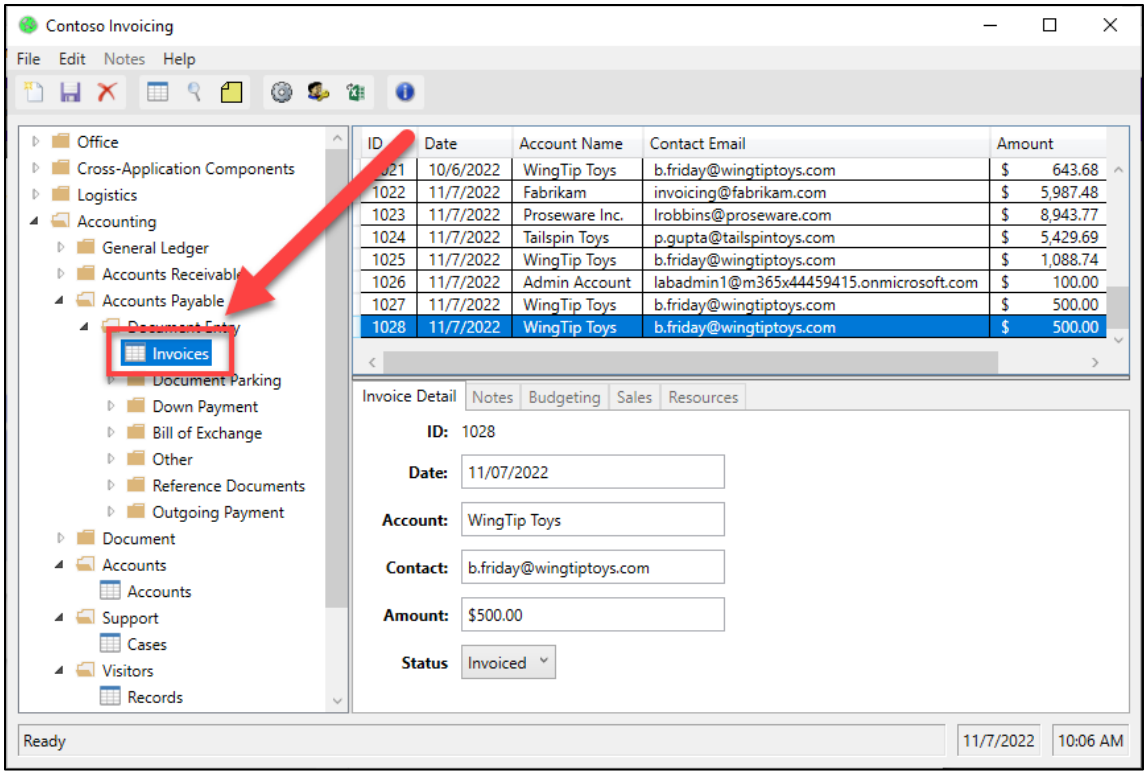
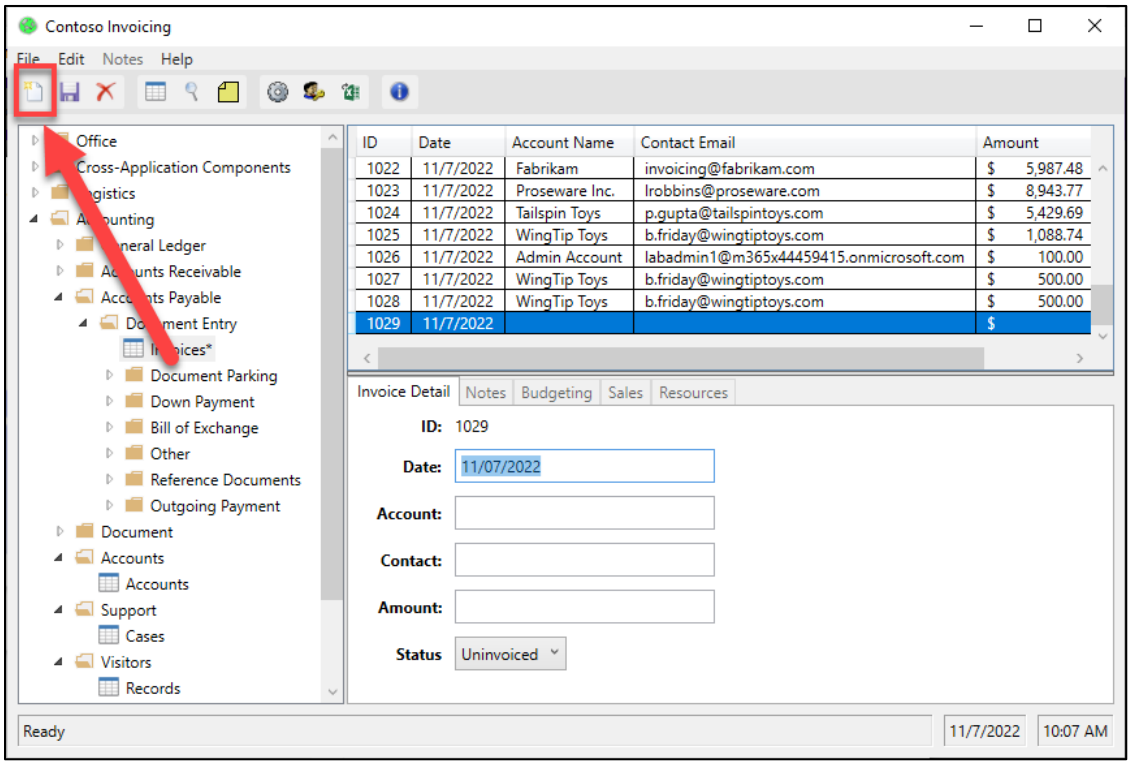


17. Now, create a new record by selecting the **New record** icon from the ribbon at the top of the screen to the left.



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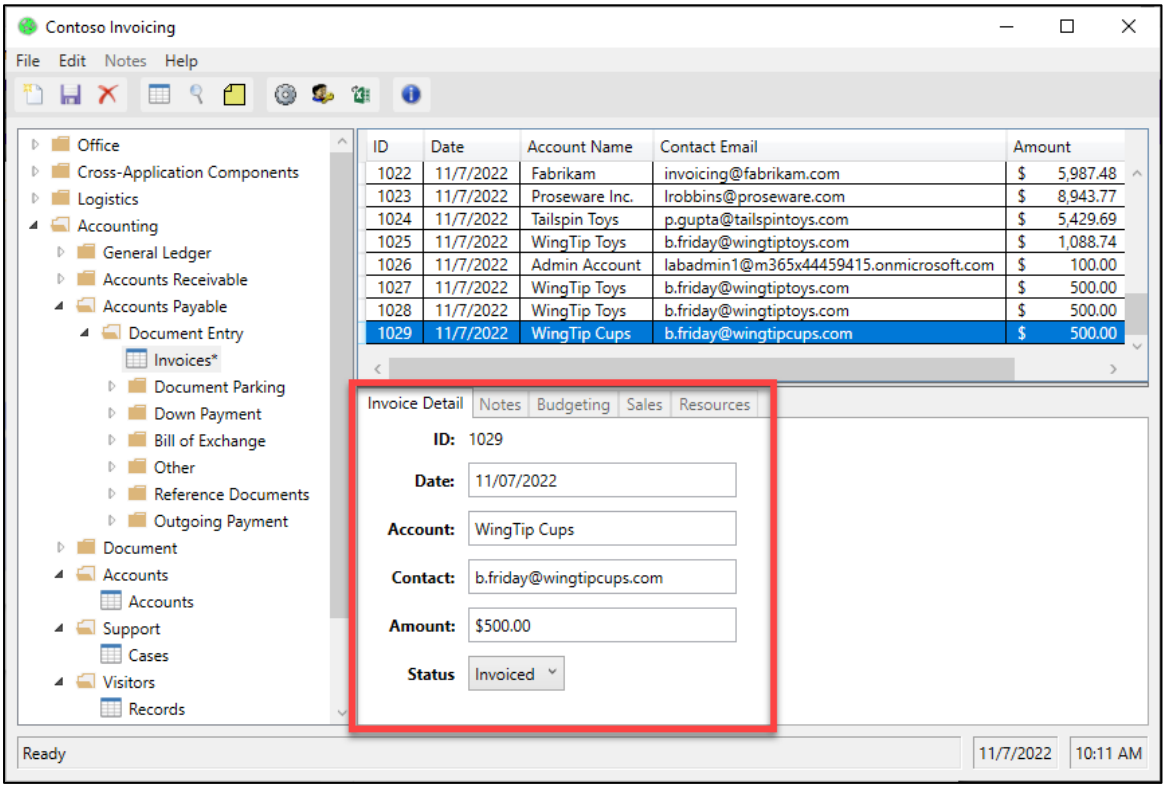
18. Use these sample values to complete the recording (Note: you can also use any arbitrary values)
    - Date: Current date
    - Account: WingTip Cups
    - Contact: b.friday@wingtipcups.com
    - Amount: $500
    - Status: Invoiced



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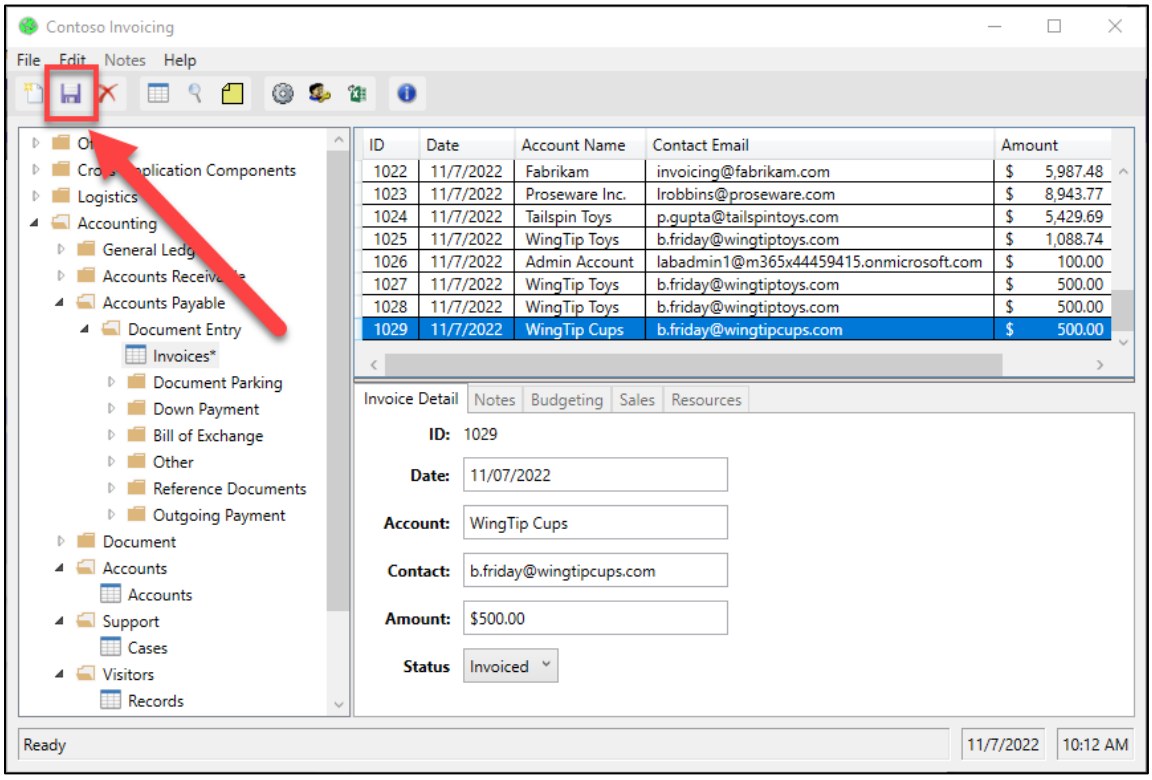
19. Select the **Save** icon from the ribbon at the top of the screen, to the left, to keep your changes.



20. Now, select the **Done** button at the bottom of the **Recorder** and **close** the **Contoso Invoicing app**.

Note: We did not record closing the app. This is for simplicity to view the result as the Contoso app will remain open after we test the Desktop flow. In a real-world use case, you can decide to record the closing action or not.

Note 2: By default, the Desktop flow will launch a new instance of the app every time it runs. Even if you leave the app open, the next Desktop flow run will launch another new app window. You can also change this behavior to only attach to existing app instead of launching another new instance from the portal (details see following steps).

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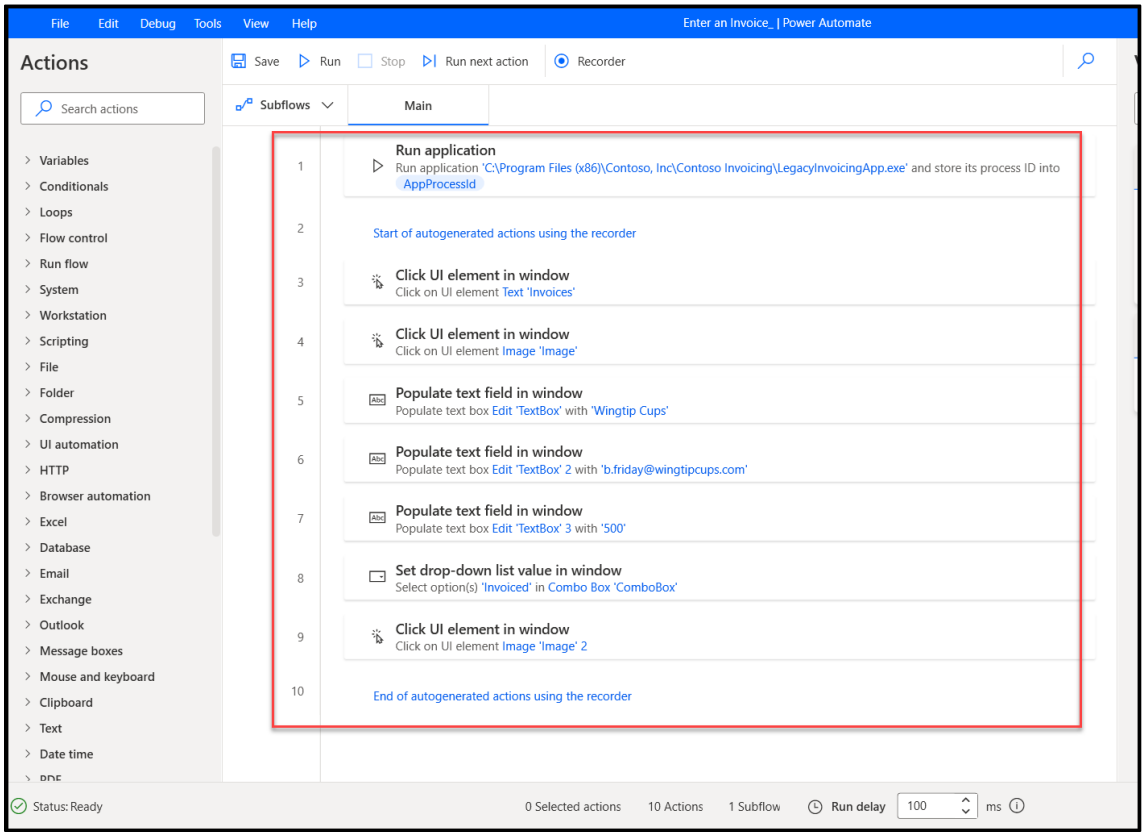
21. Within the **Power Automate for desktop app**, you can view the recorded script of each step.



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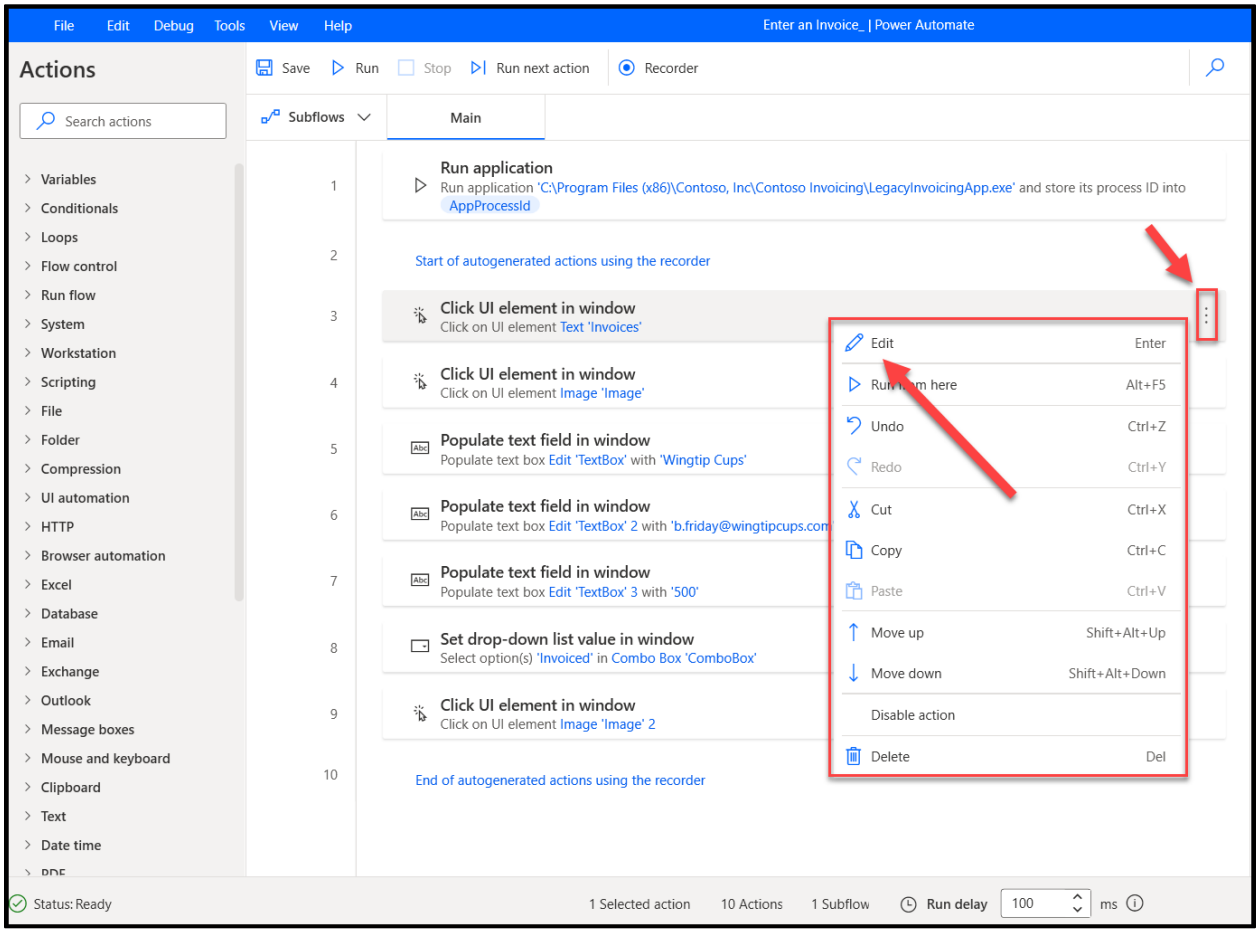
You can edit each step by selecting the ellipses (…) icon to the right of the title and selecting Edit from the options list. You can also double-click each step to view the options list.



Tip: You can also select the ellipses (…), and then the **Delete** option from the list to remove any duplicate steps or the entire script.

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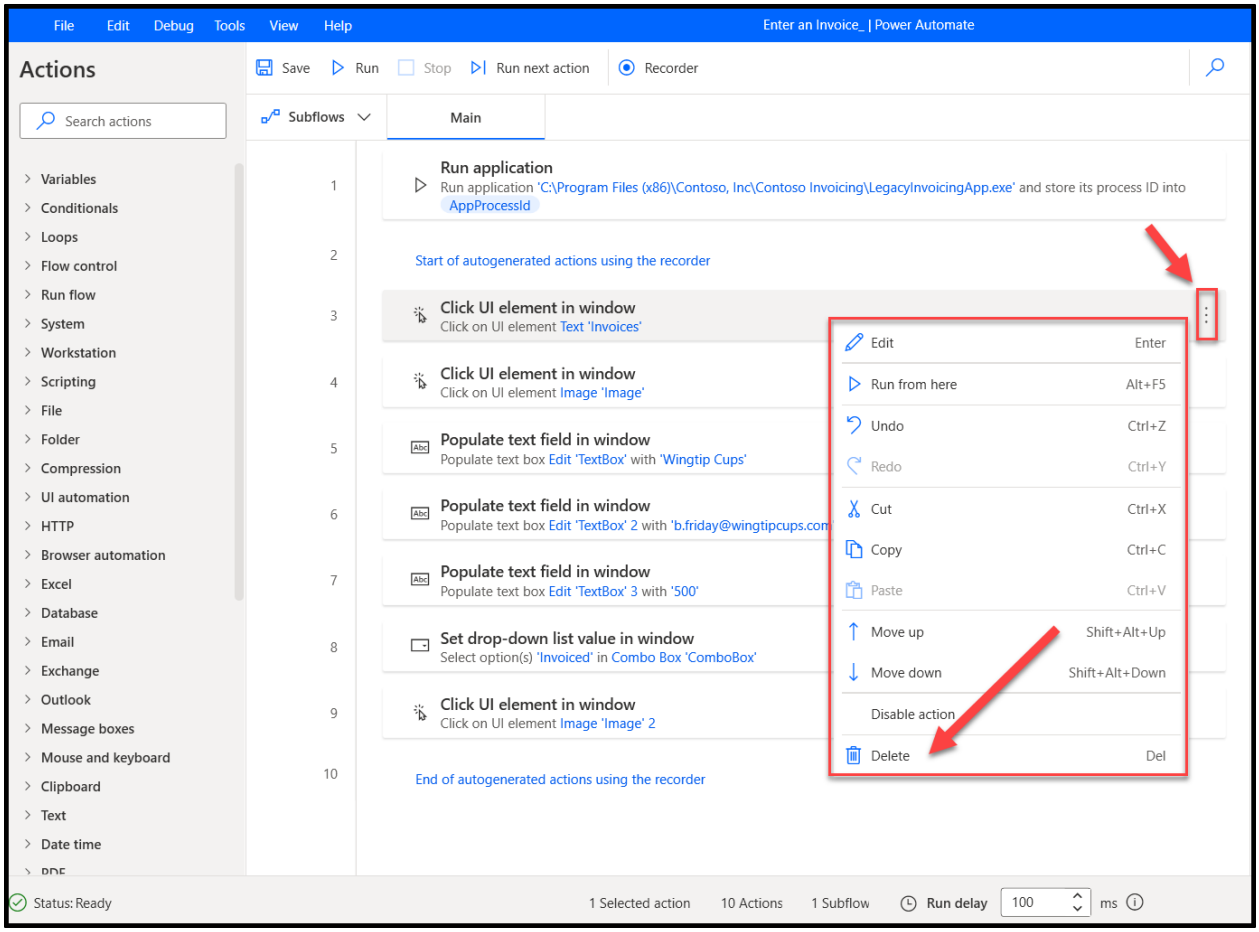
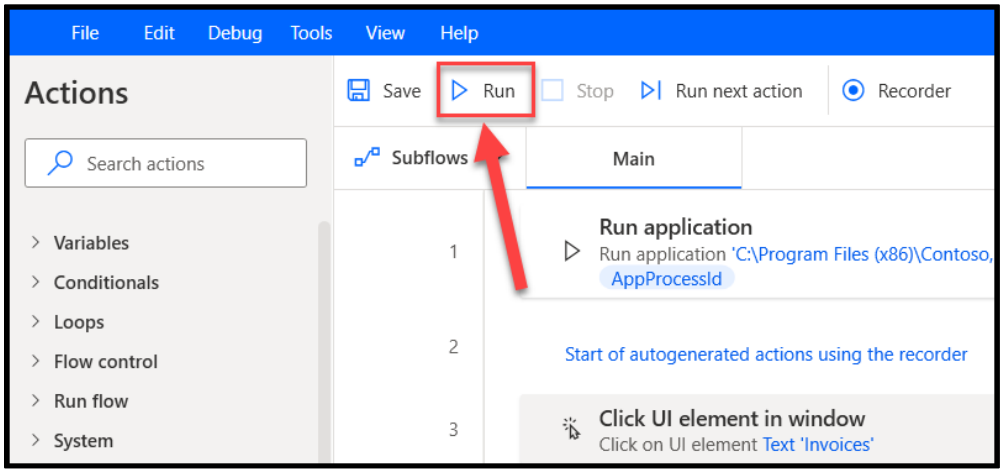


22. You can select the **Run** icon at the top of the screen to playback and test your flow.

Note: Don't interact with your device during testing. You will see the recording played back successfully.



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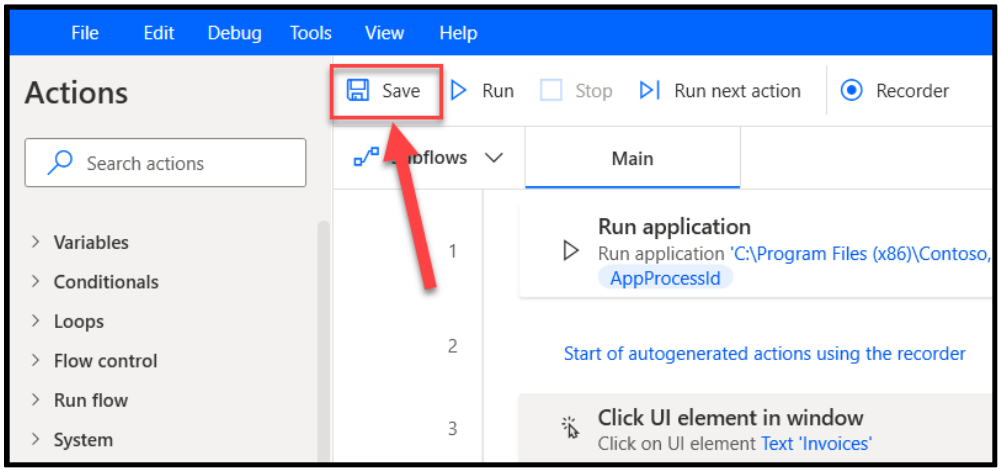
23. Select the **Save** icon at the top of the screen to save this desktop flow



24. **Close** the **Power Automate** application.

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Pro Tip

If you want to reset the data saved in Contoso Invoice app, you can modify or delete the excel file under this folder:

%userprofile%\Documents\Contoso Invoicing - 1.0.15.0

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Check your knowledge

Lab 2

5 minutes

1. You can use any environment to create a new Power Automate desktop flow.
   A. True
   B. False

2. Which of the following panes contains reusable components that can be used within your automated process?
   A. Actions pane
   B. Workspace
   C. Flow variables
   D. The toolbar

3. After opening and minimizing the Contoso Invoicing app manually, you will select the _____ button to start your 'Enter an invoice' recording.
   A. Save
   B. Recorder
   C. Run
   D. Run the next action

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Answer Key

1. You can use any environment to create a new Power Automate desktop flow.
   A. True
   B. False

   Answer: **B**. False - You can only create desktop flow in an environment that has a Microsoft Dataverse database.

2. Which of the following panes contains reusable components that can be used within your automated process?
   A. Actions pane
   B. Workspace
   C. Flow variables
   D. The toolbar

   Answer: **A**. The Actions pane contains reusable components that simplify completing common tasks such as setting a variable, opening a file etc.

3. After opening and minimizing the Contoso Invoicing app manually, you will select the _____ button to start your 'Enter an invoice' recording.
   A. Save
   B. Recorder
   C. Run
   D. Run the next action

   Answer: **B**. The Recorder allows you to start recording your actions within the application.

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