

Robotic Process Automation in a Day

Lab 4 – Integrate with cloud flows (create machine connection)

60 mins

February 2023



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Lab Overview

In the previous labs, you have created a desktop flow that will enter a new invoice entry for Contoso Coffee shop using the input variables being provided. The input variables could come from previous process steps, e.g., when a new invoice file is being received and processed and data being extracted from the file. Those steps could be automated using Power Automate cloud flow, which has hundreds of connectors you can choose to use. Let us now learn how to create a cloud flow and connect it with the desktop flow you have created, so business data for your Contoso Coffee shop can flow from cloud to your desktop. You will complete the following tasks in this lab:

- Create your first cloud flow
- Configure machine connection to enable the cloud flow to execute the desktop flow on your computer
- Add the "Enter invoice with input" desktop flow to this new cloud flow
- Perform a test run of the new cloud flow that will execute the desktop flow on your computer
- Learn how to manage your machine from the cloud or share your machines with others if there is a business need

Prerequisites

This lab builds on the previous labs – ensure all tasks are complete.

Note: If you have registered your machine with Lab 1, you should be good to go. In such a case, just look at the steps below to ensure your machine is registered properly.

Learn about manage machines

Machines are the physical or virtual devices that are used to automate your desktop processes. When you connect your machine to Power Automate, you can instantly start your desktop automation using any of the wide array of available triggers, such as when you receive an e-mail or on a pre-defined schedule.

Connecting your machine directly to Power Automate and the cloud allows you to harness the full power of your robotic process automation (RPA). The easiest way to connect your machine to the cloud is with our direct connectivity. All you need to do is ensure that you installed and signed into the latest version of Power Automate for desktop, and your machine will be registered with Power Automate automatically. Once registered, you can create a connection right away in your cloud flows.

Note: Direct connectivity is only available for versions of Power Automate for desktop 2.8.73.21119 or newer. If you are using an older version, [update to the latest](#).

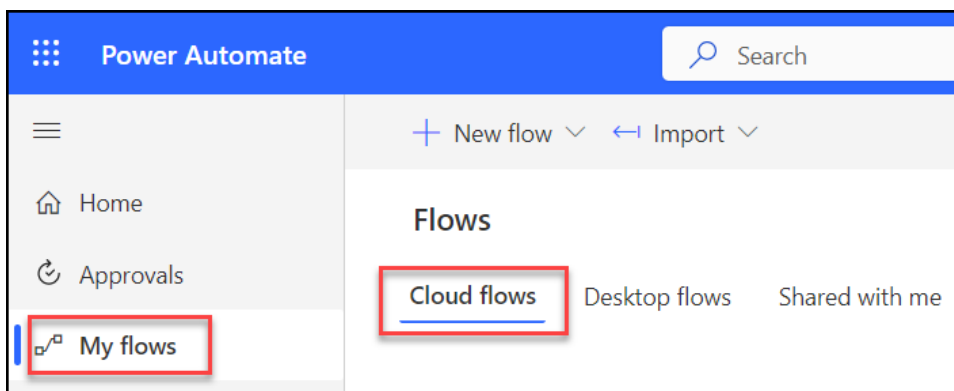
Register your desktop machine as a new machine

Note: this is covered in pre-requisite #1. Your machine should have already been registered on the currently selected environment in the application.

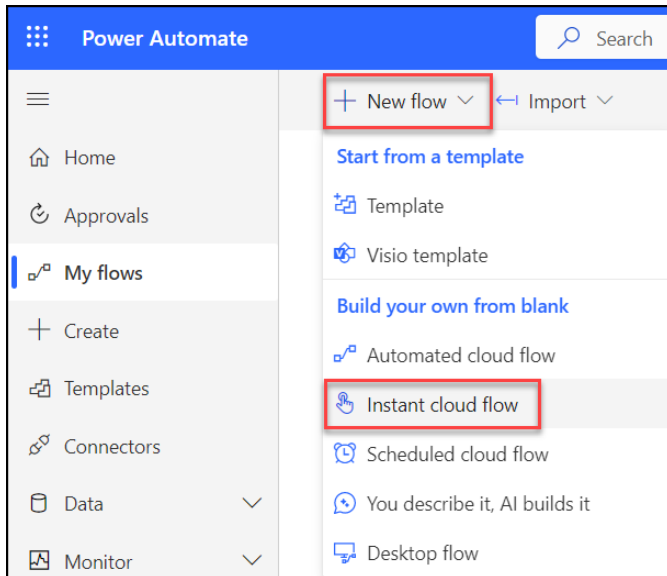
Create your first cloud flow and a connection to trigger a desktop flow to run on your machine

Note: To use this functionality, you must own a paid or a trial of [premium per-user plan with attended RPA](#). (If you have done lab 1 pre-requisite, you should already have a premium trial

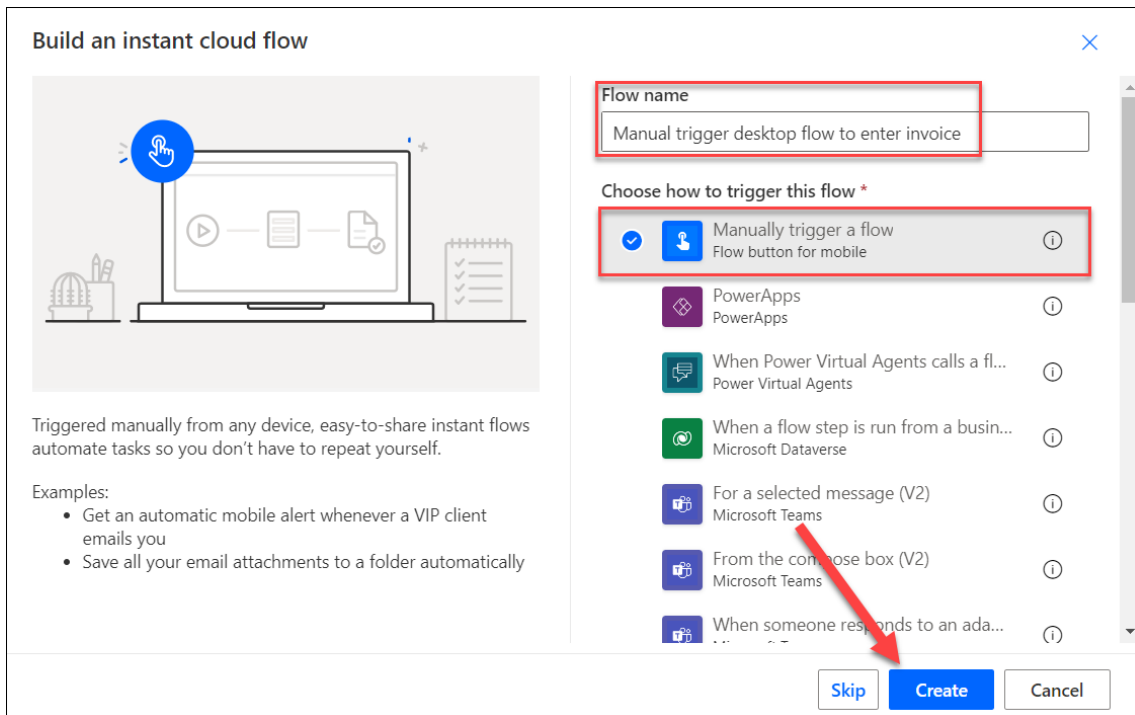
1. Open a new window browser and navigate to <https://make.powerautomate.com>. Sign-in if needed.
2. From the menu to the left of the screen, select **My flows**. Then, select the **Cloud flows** tab.



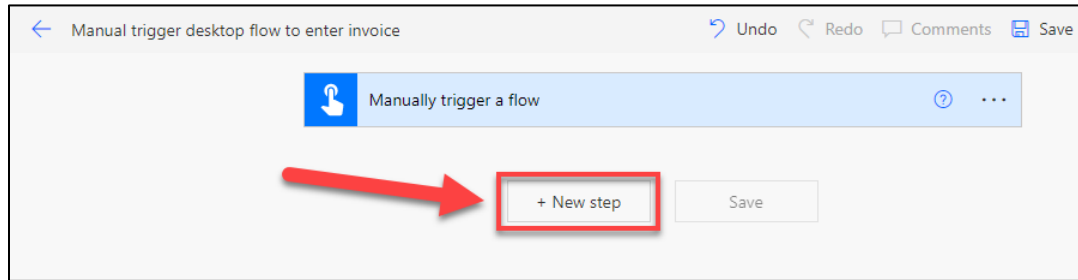
- From the top of the screen, select the **New flow** drop-down, then select **Instant cloud flow** from the menu.



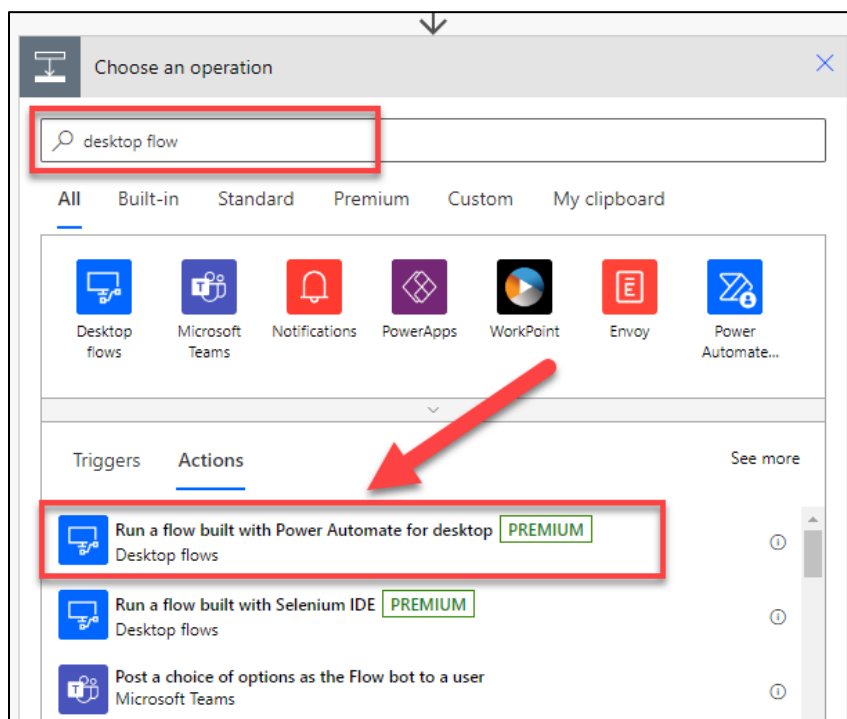
- Name the flow **Manual trigger desktop flow to enter invoice**, then choose **Manually trigger a flow**. Then, select **Create**.



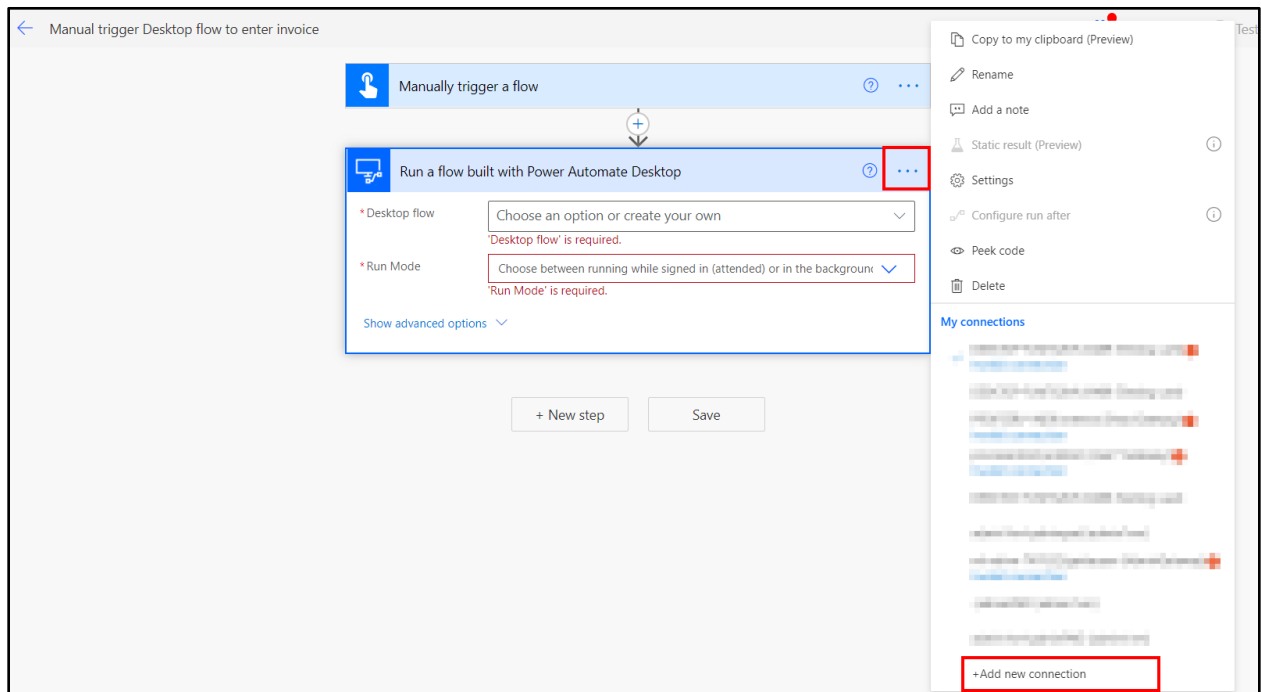
5. Add a step by selecting **+ New step**.



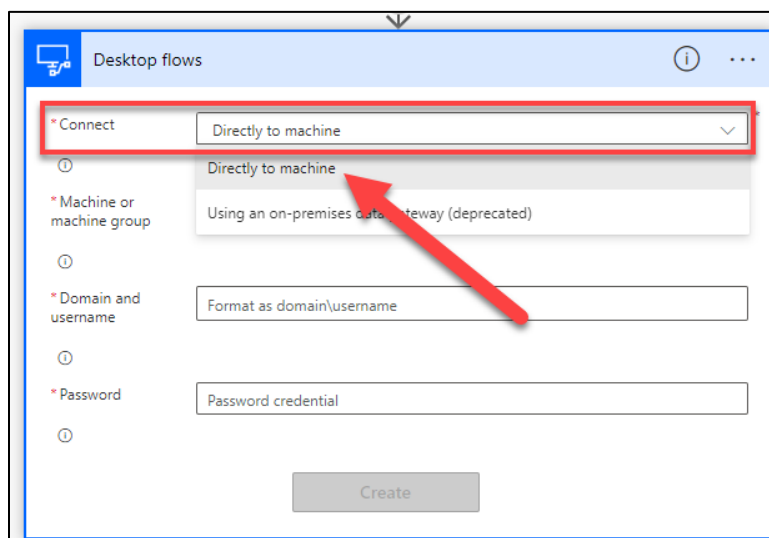
6. Type **desktop flow** in the search box and choose **Run a flow built with Power Automate for desktop (Premium)**.



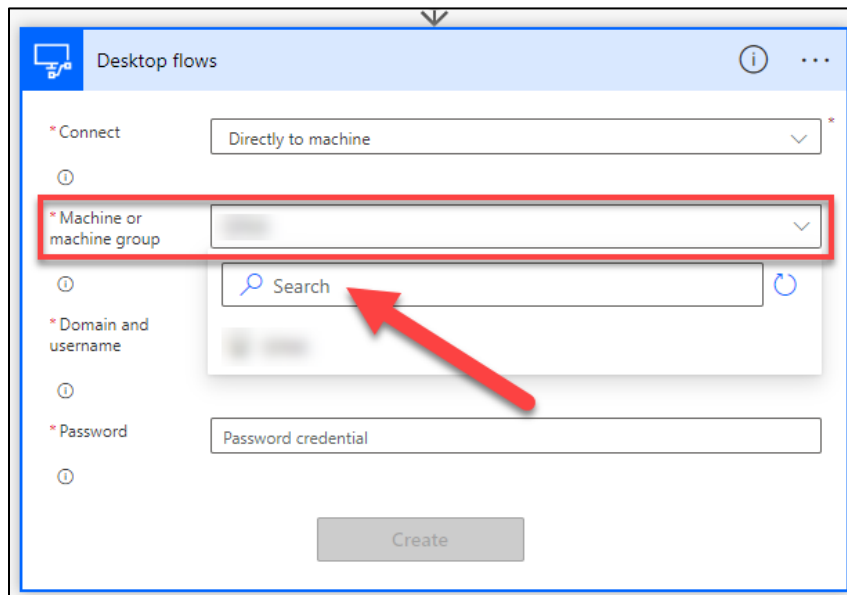
7. If you've already created a connection with desktop flows, select the **ellipses (...)** in the top right and under My connections to select an existing desktop flow connection. You can also select **+Add new connection** to create a new connection.



8. If you have **not** created a connection before, or if you select **+Add new connection** from the step above, you will see this interface allows you to create a connection. In the dropdown box next to **Connect**, select **Directly to machine**.



9. Select the **name** of your machine under **Machine or machine group**.

The image shows a screenshot of the 'Desktop flows' configuration window. The window has a title bar with a laptop icon and the text 'Desktop flows'. Below the title bar, there are several fields: '* Connect' with a dropdown menu showing 'Directly to machine', '* Machine or machine group' with a dropdown menu, '* Domain and username' with a search field and a refresh icon, and '* Password' with a text field. The 'Machine or machine group' field is highlighted with a red box, and a red arrow points to the search icon in the 'Domain and username' field. At the bottom of the window is a 'Create' button.

10. Enter the **username** and **password** you would use to sign into your machine under **Domain username** and **Password**.

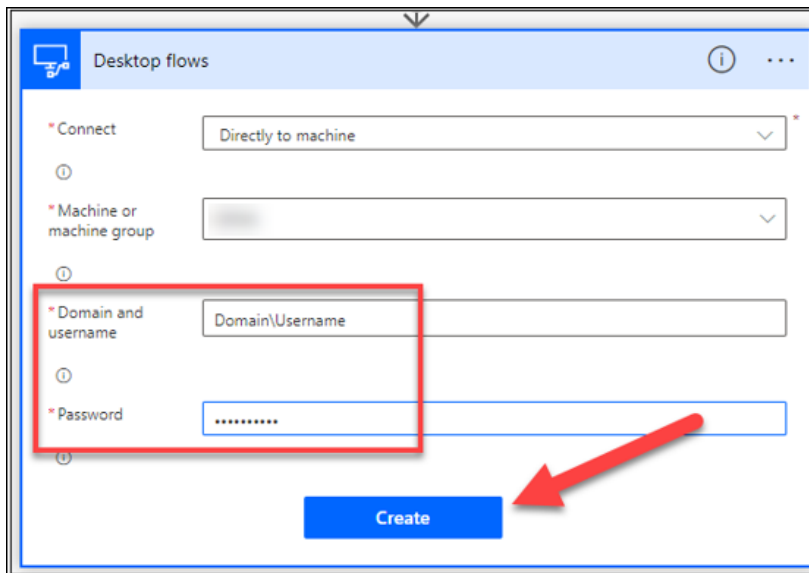
Note: If you are not sure what to put in the Domain and username field, you can use the **Command Prompt** window (open Windows Start menu, type CMD and hit enter), type "**Set user**" command to locate the Domain and Username. Fill in the textbox with **USERDOMAIN\USERNAME**.

If this is not a domain account, then use the "**Set computer**" command to look for the computer name. Fill in the text with **COMPUTERNAME\USERNAME**.

Tips: to make sure you have the correct login credentials. You can try log out the computer and use the username/password combination to see if you can successfully log onto this computer.

Important: The account you will use must have local admin rights on your machine.

11. Then, select **Create**.



Desktop flows

* Connect: Directly to machine

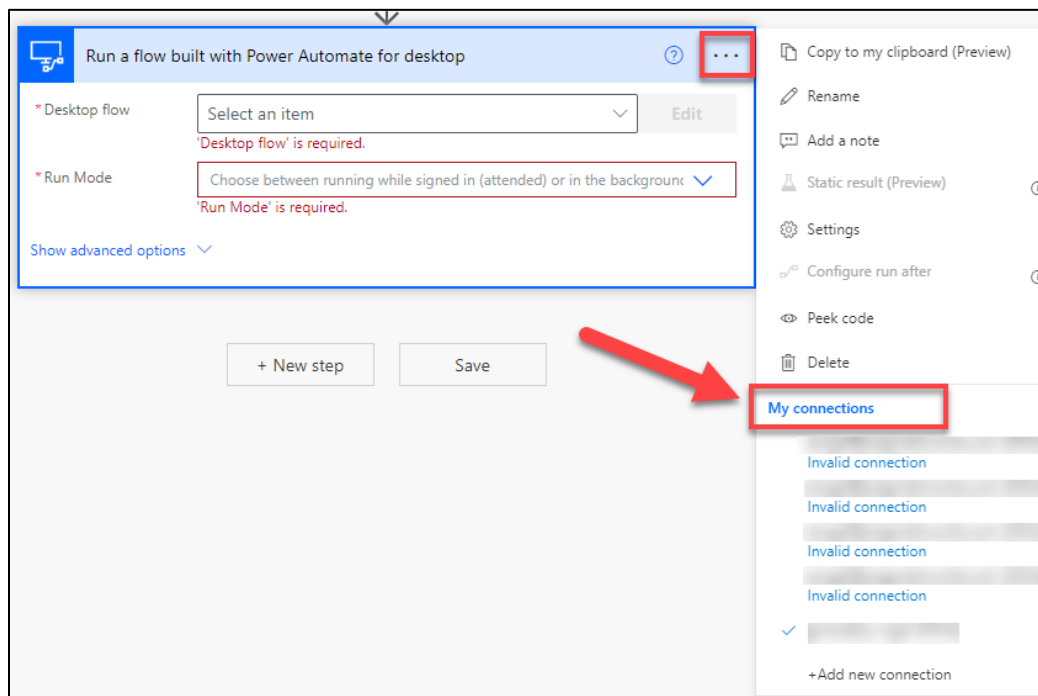
* Machine or machine group: [Empty]

* Domain and username: Domain\Username

* Password: [Masked]

Create

12. After setting up the connection, you can always see and select your connection under **My connections** by selecting the **ellipses (...)** to the right of the step title.



Run a flow built with Power Automate for desktop

* Desktop flow: Select an item

* Run Mode: Choose between running while signed in (attended) or in the background

Show advanced options

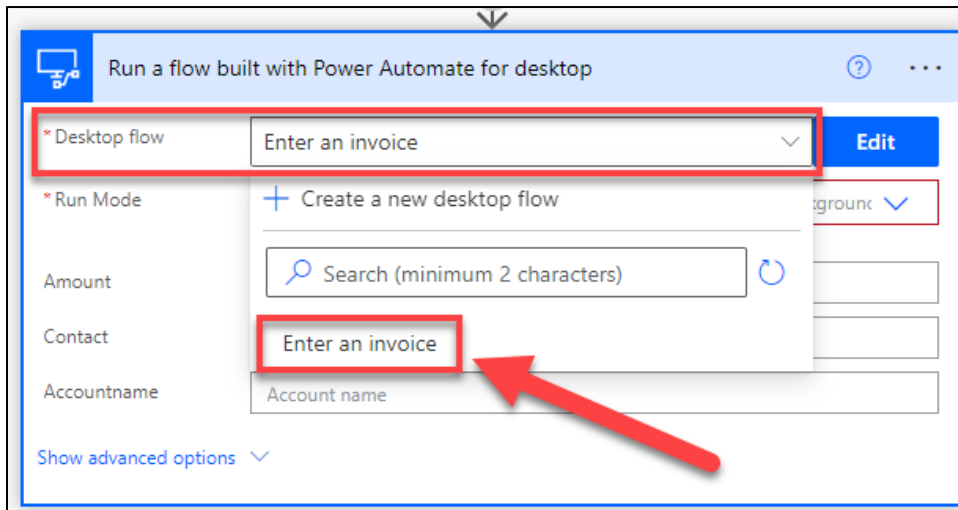
+ New step Save

My connections

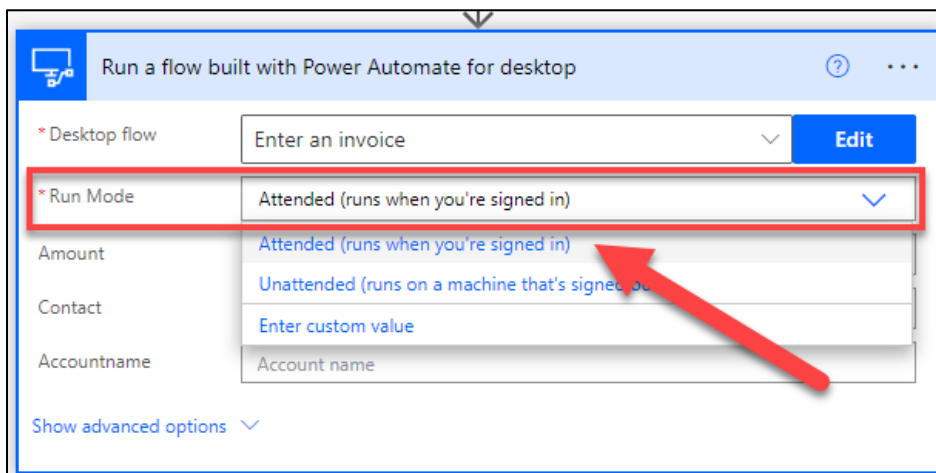
- Invalid connection
- Invalid connection
- Invalid connection
- Invalid connection
- ✓ [Valid connection]

+Add new connection

13. Under **Desktop flow**, select the **Enter an invoice** desktop flow that you have created in a previous lab.



14. Under **Run Model**, select **Attended (runs when you're signed in)**. This mode will run the desktop flow while you are signed in the same machine. (**Note:** Unattended mode is for running automation on the server machines without users signing in. You can learn more about unattended mode in lab 9).



15. Fill in the **Amount**, **Contact** and **Accountname** boxes with the sample input values below: (**Note:** we are using static input values for now and will learn in the next labs how to use dynamic input values)

- Amount: \$200
- Contact: b.friday@wingtipcups.com
- Account name: WingTip Cups

16. Then, select **Save**.

Run a flow built with Power Automate for desktop

* Desktop flow: Enter an invoice [Edit]

* Run Mode: Attended (runs when you're signed in) [v]

Amount: \$200

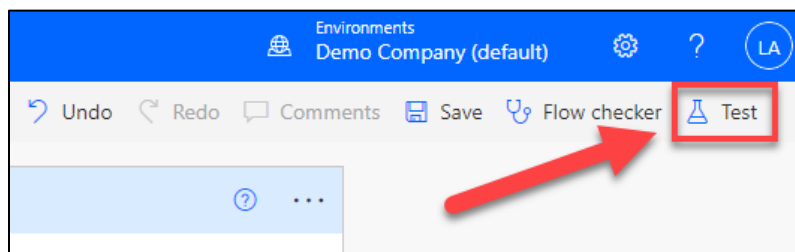
Contact: b.friday@wingtipcups.com

Accountname: WingTip Cups

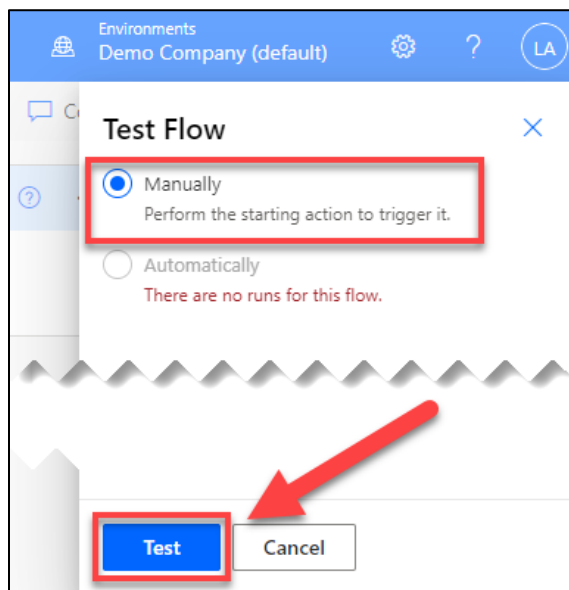
Show advanced options [v]

+ New step [Save]

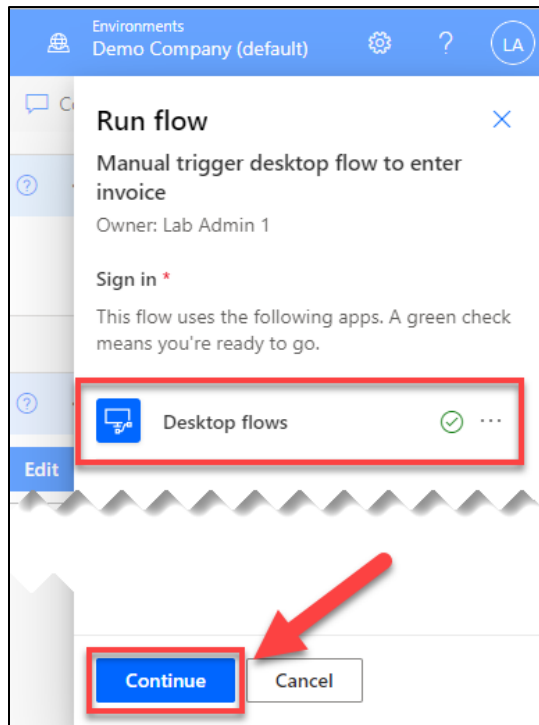
17. Select **Test** at the top-right of the screen.



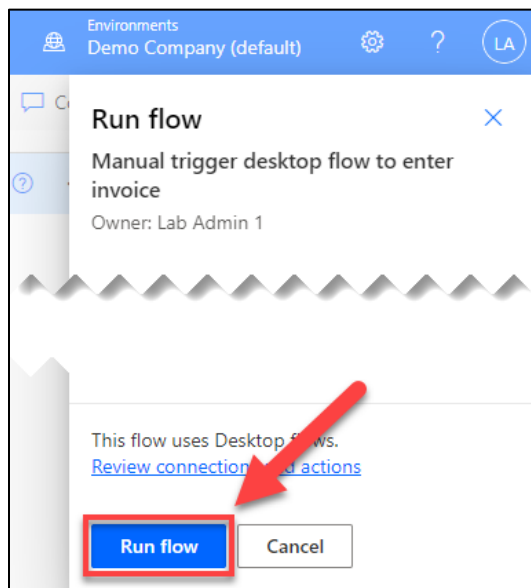
18. From the **Test Flow** pane, select **Manually**. Then, select **Test**.



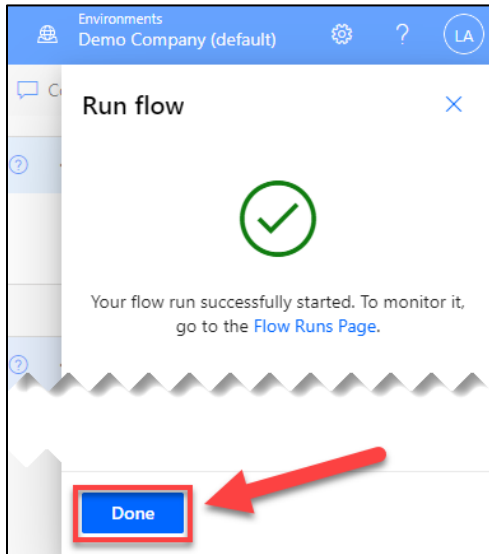
19. If you see a green checkmark to the right of **Desktop flows**, then you are ready to go. Select **Continue**.



20. Select **Run flow**.



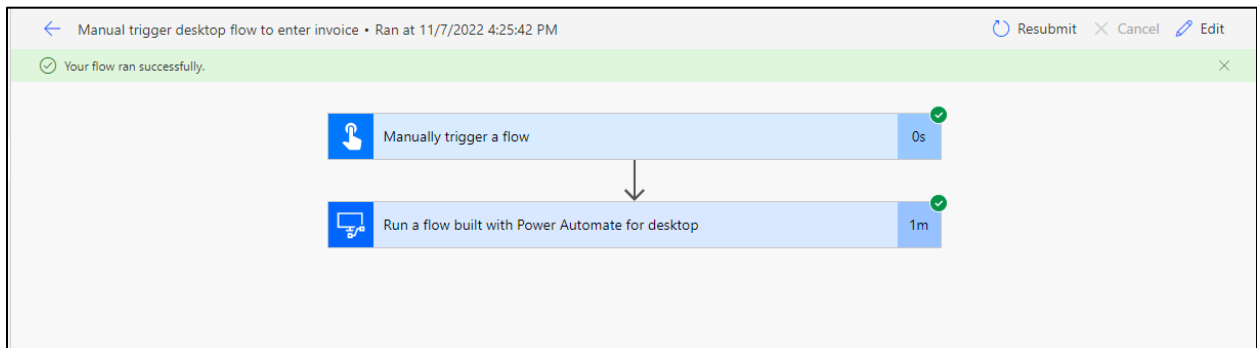
21. Select **Done** if your flow run successfully started.



Note: Do not interact with your device while testing.

22. Watch as your desktop flow will be triggered from the cloud and run on your desktop

23. After your flow has run successfully, you will see the run detail page.



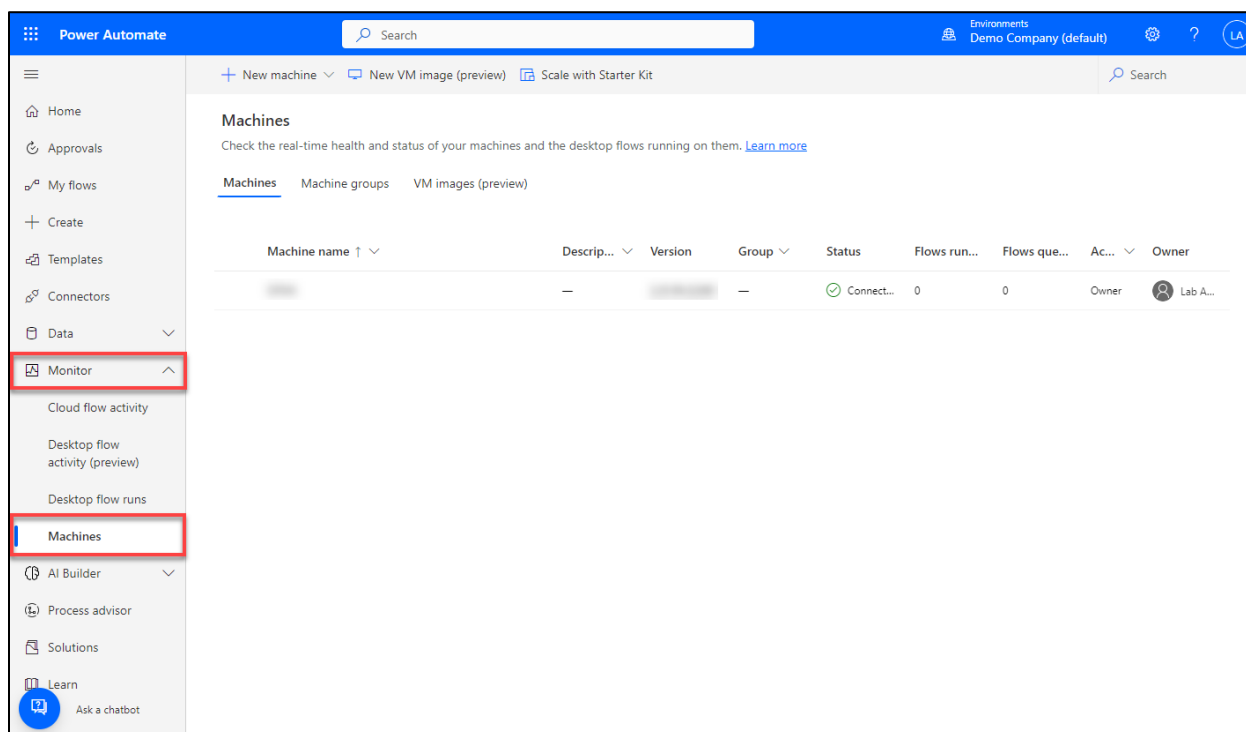
Monitor the list of machines

Once a machine is registered to an environment, you can view its details at any time anywhere from the Power Automate website. You can also view all other machines that you have access to. Here are the steps on how to do it.

1. Open the test profile in a browser and navigate to make.powerautomate.com. Then, sign in if needed.
2. Select **Monitor** from the menu to the left of the screen, then select **Machines**.

Within the list, for each machine you can view:

- The name of the machine.
- Description of the machine.
- The group that the machine is a part of, if applicable.
- The status of the machine.
- The number of flows running on the machine.
- The number of flows queued on the machine, if applicable.
- The type of access you have to the machine.
- The owner of the machine.

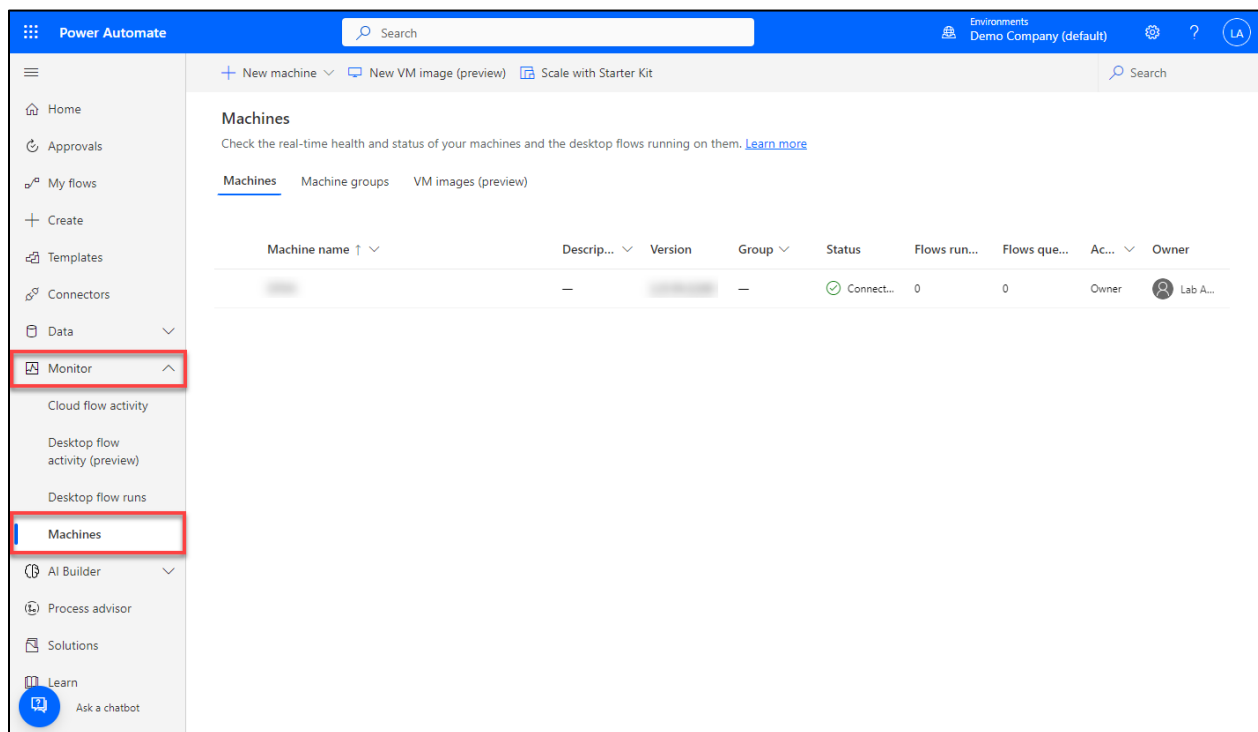


Share a machine

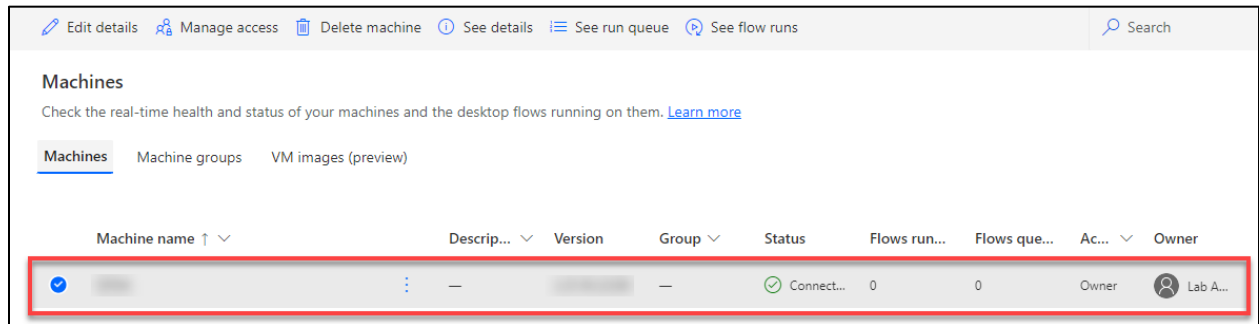
You can also share a machine with other users in your organization, giving those users specific permissions to access your machine and run automation on it. Here are the steps on how to do it.

Note: you should only share machines with others when there is a real necessary business need, because this action will allow the people who you share machine with to be able to run automations on your machine any time.

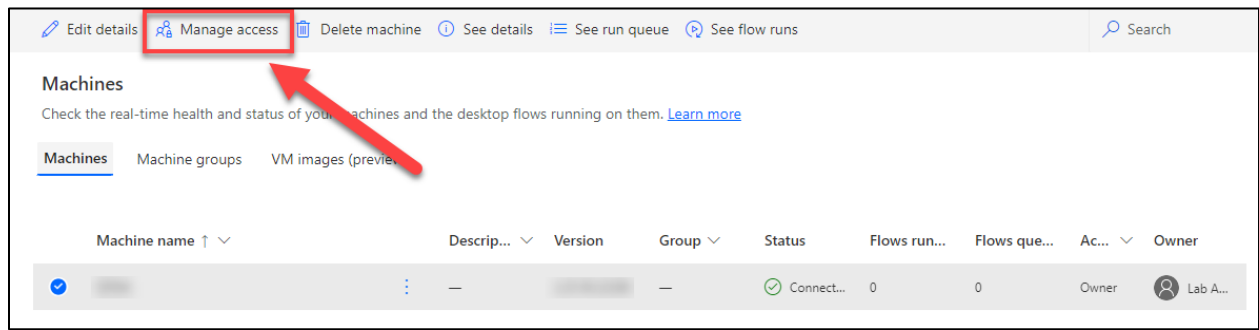
1. Open the test profile in a browser and navigate to powerautomate.microsoft.com. Sign-in if needed.
2. From the menu to the left of the screen, select **Monitor**, then select **Machines**.



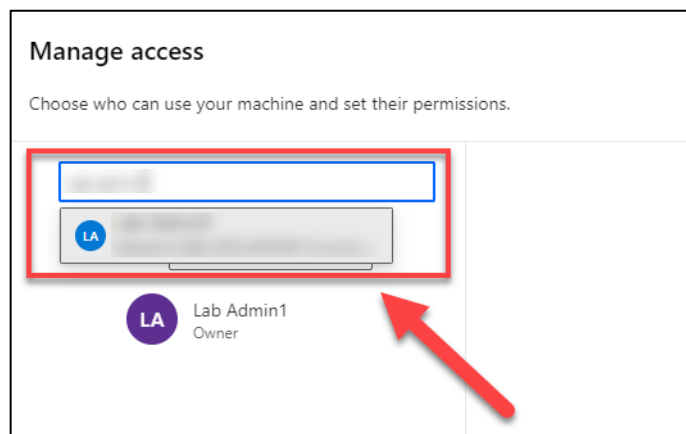
3. Select your machine from the list.



4. Select **Manage access** from the top of the screen.



5. Select the **Add people** field, then enter the **name** of the person in your organization with whom you'd like to share the machine.
6. Select the name of the person to choose with which permissions they can access the machine.



7. Select **Save**.

Manage access

Choose who can use your machine and set their permissions.

Add people

New

LA

Shared with Sort by Name

LA

Save Cancel

8. There are two levels of permissions that you can use when managing access to your machine:

- **Co-owner:** This access level gives full permissions to that machine. Co-owners can run desktop flows on the machine, share it with others, edit its details, and delete it.
- **User:** This access level only gives permission to run desktop flows on the machine. No edit, share, or delete permissions are possible with this access.

Manage access

Choose who can use your machine and set their permissions.

Add people

New

✓

LA

Shared with

Sort by Name

LA

☒ User

Can run desktop flows on this machine.

☐ Co-owner

Can run desktop flows on this machine, share it with others, edit its details, and delete it.

Actions	Co-owner	User
Run a desktop flow on the machine	X	X
Share the machine	X	
Add machine to group	X	
Edit details	X	
Delete machine	X	

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Check your knowledge

Lab 4

5 mins

1. Users will need either an _____ or desktop flow Machine Owner role to register machines
 - A. Environment maker
 - B. Environment user
 - C. Environment Help
 - D. None of the above
2. If the cloud flow run failed at the desktop flow step, always go to the desktop flow page, select the desktop flow just ran, and look up run history from there to see detail error messages. This will help you troubleshoot and fix the run.
 - A. True
 - B. False
3. When creating a connection to use the "Run a flow built with Power Automate Desktop" action, if you are not sure what to put in the domain and username field, you can use the Command Prompt window (open Windows Start menu, type CMD and hit enter), type "_____" command to locate the Domain and Username.
 - A. Find user
 - B. Locate user
 - C. What's my user?
 - D. Set user

Answer Key

1. Users will need either an _____ or desktop flow Machine Owner role to register machines

A. Environment maker

- B. Environment user
- C. Environment Help
- D. None of the above

Answer: **A.** Environment user

2. If the cloud flow run failed at the desktop flow step, always go to the desktop flow page, select the desktop flow just ran, and look up run history from there to see detail error messages. This will help you troubleshoot and fix the run.

A. True

- B. False

Answer: **A.** True, you can find detailed information about your desktop flow execution within the desktop flow run history page.

3. When creating a connection to use the "Run a flow built with Power Automate Desktop" action, if you are not sure what to put in the domain and username field, you can use the Command Prompt window (open Windows Start menu, type CMD and hit enter), type "_____" command to locate the Domain and Username.

- A. Find user
- B. Locate user
- C. What's my user?

D. Set user

Answer: **D.** Set user

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