

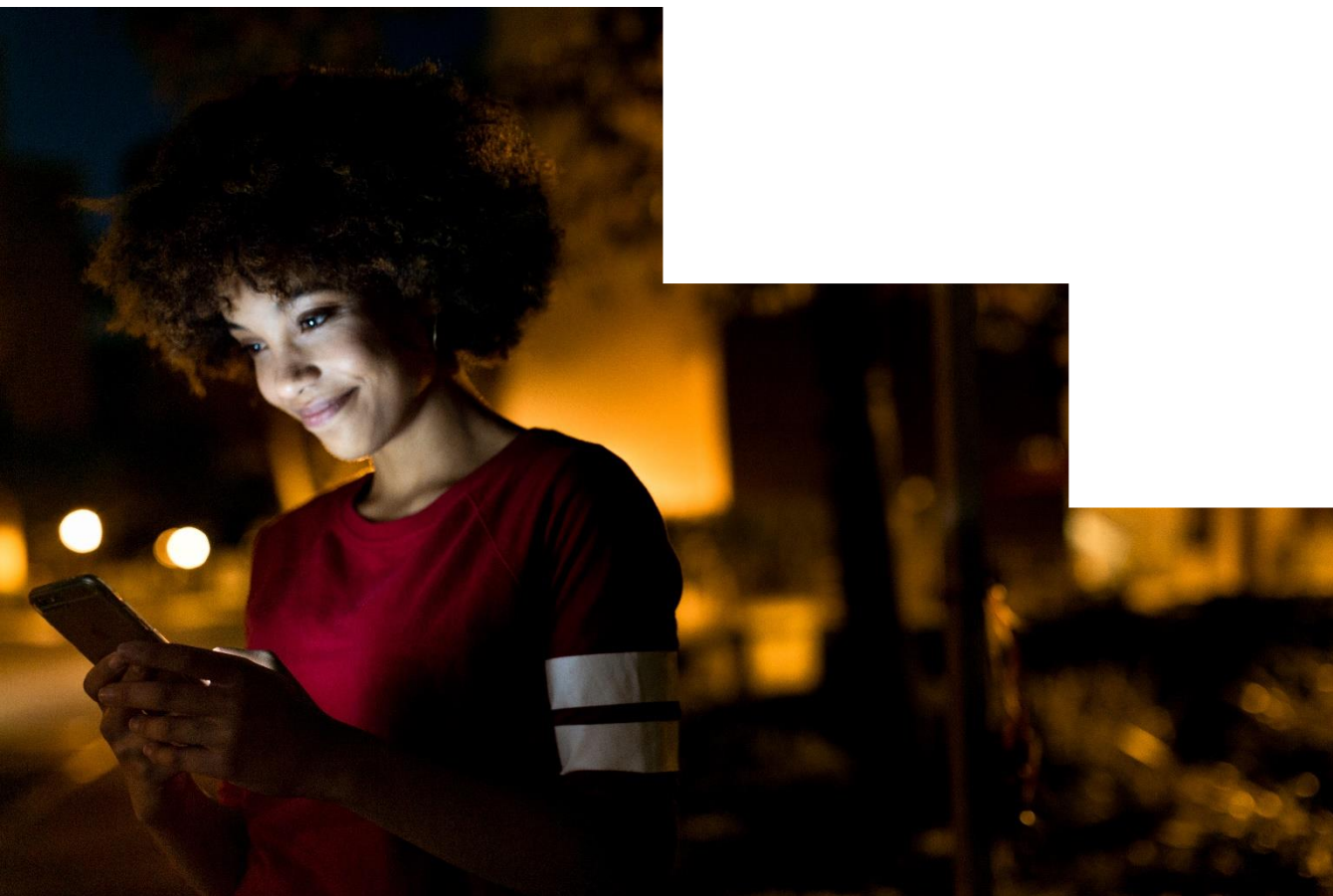


Robotic Process Automation in a Day

Lab 5 – Integrate with cloud flows (create machine connection)

60 mins

October 2021



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.

© 2021 Microsoft Corporation. All rights reserved.

Lab Overview

You will complete the following tasks in this lab:

- Create a cloud flow
- Configure machine connection to enable the cloud flow to execute the desktop flow on your device
- Add the "Enter invoice with input" desktop flow to this new cloud flow
- Perform a test run of the new cloud flow

Prerequisites

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

Note: If you have registered your machine with Lab 1.3 steps, you should be good to go. In such case, just take a look at the steps below to ensure, you're machine is registered properly.

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 scheduled.

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 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 Desktop 2.8.73.21119 or newer. If you are using an older version, [update to the latest](#).

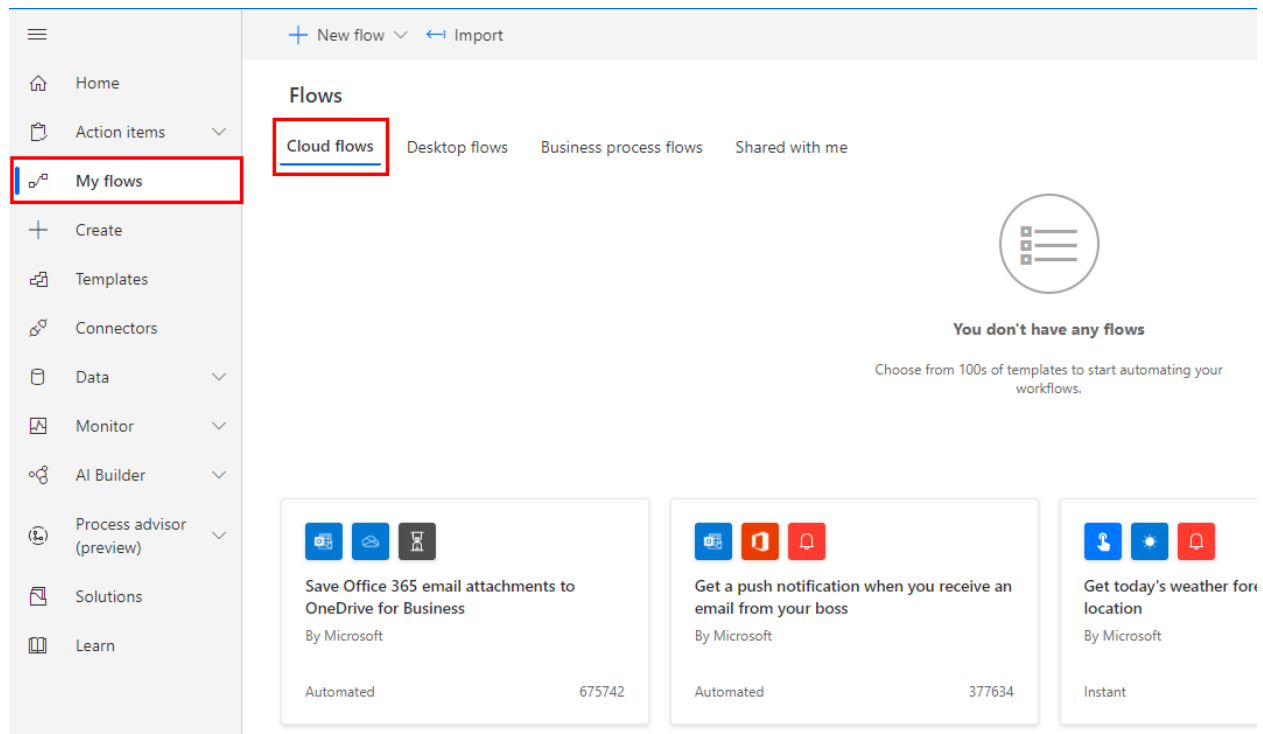
Register a new machine

Note: this is covered in pre-requisite #1.3. Your machine should have already been registered on the currently selected environment in the application.

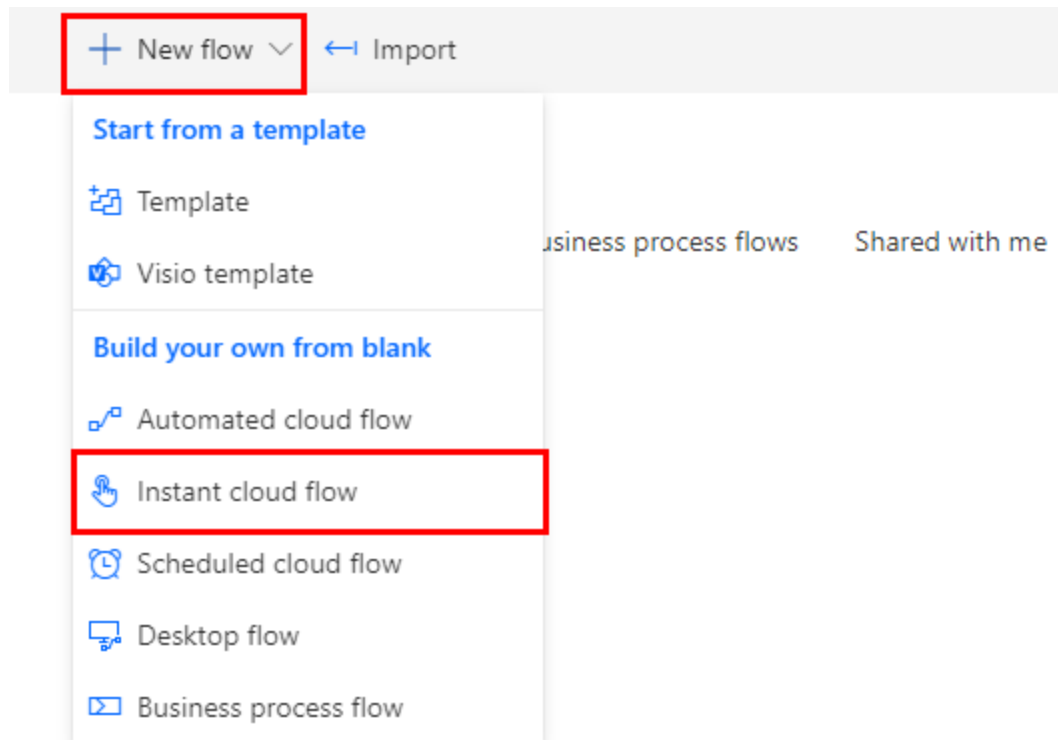
Trigger a desktop flow to run on your machine

Note: To use this functionality, you have to own a paid or a trial of [premium per-user plan with attended RPA](#). (If you have done lab 1.1 pre-requisite, you should already have a premium trial)

1. Open the test profile in a browser and navigate to <https://powerautomate.microsoft.com>.
2. Select **cloud flows**.



3. Select **New flow**, then select **Instant cloud flow**.



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

Build an instant cloud flow



Triggered manually from any device, easy-to-share instant flows automate tasks so you don't have to repeat yourself.








Examples:

- Get an automatic mobile alert whenever a VIP client emails you
- Save all your email attachments to a folder automatically

Flow name

Manual trigger Desktop flow to enter invoice

Choose how to trigger this flow *

- ☒  Manually trigger a flow
Flow button for mobile ⓘ
-  PowerApps
PowerApps ⓘ
-  When Power Virtual Agents calls a fl...
Power Virtual Agents ⓘ
-  When a flow step is executed
Common Data Service (current environment) ⓘ
-  For a selected message
Microsoft Teams ⓘ
-  For a selected file
OneDrive for Business ⓘ
-  For a selected file ⓘ

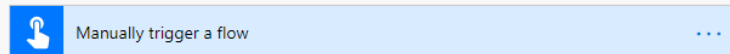
Skip

Create

Cancel

5. Add a step by clicking + New step.

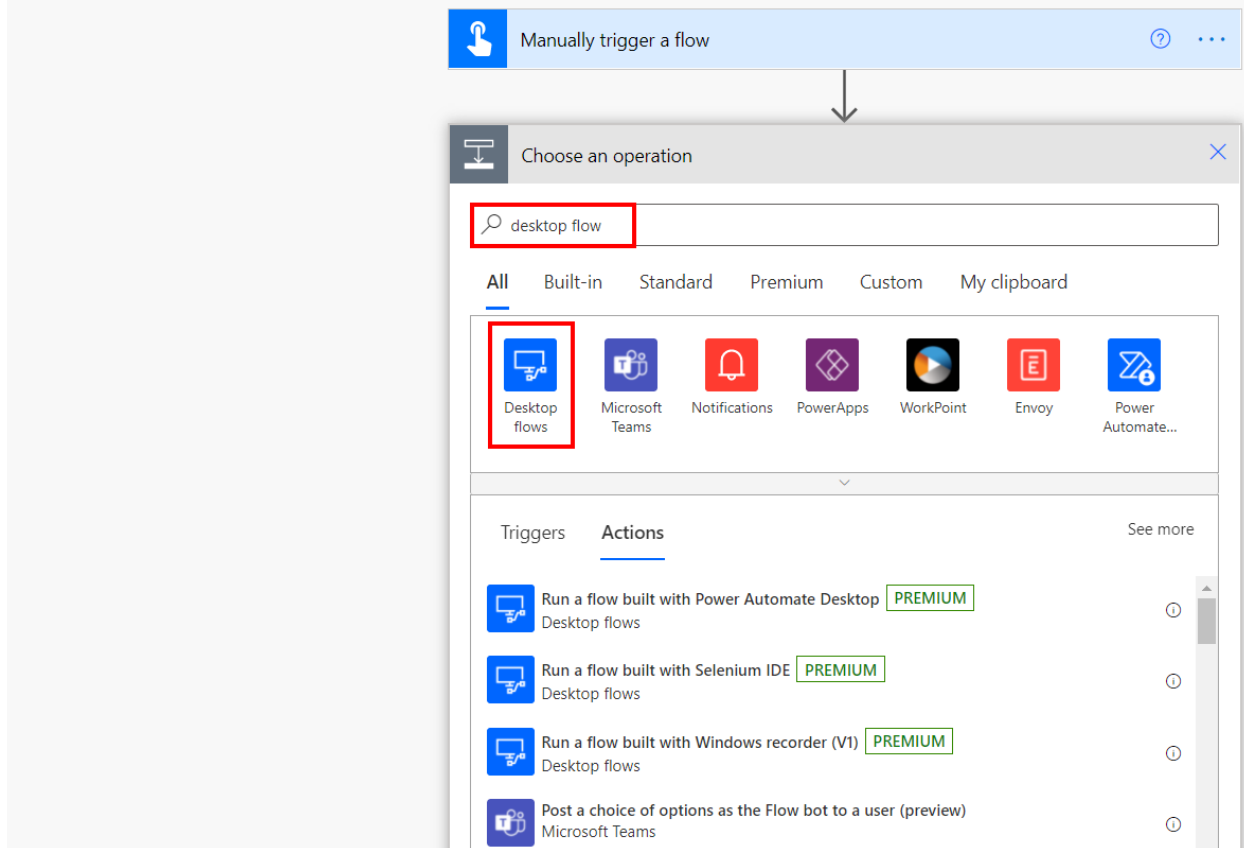
← Manual trigger Desktop flow to enter invoice



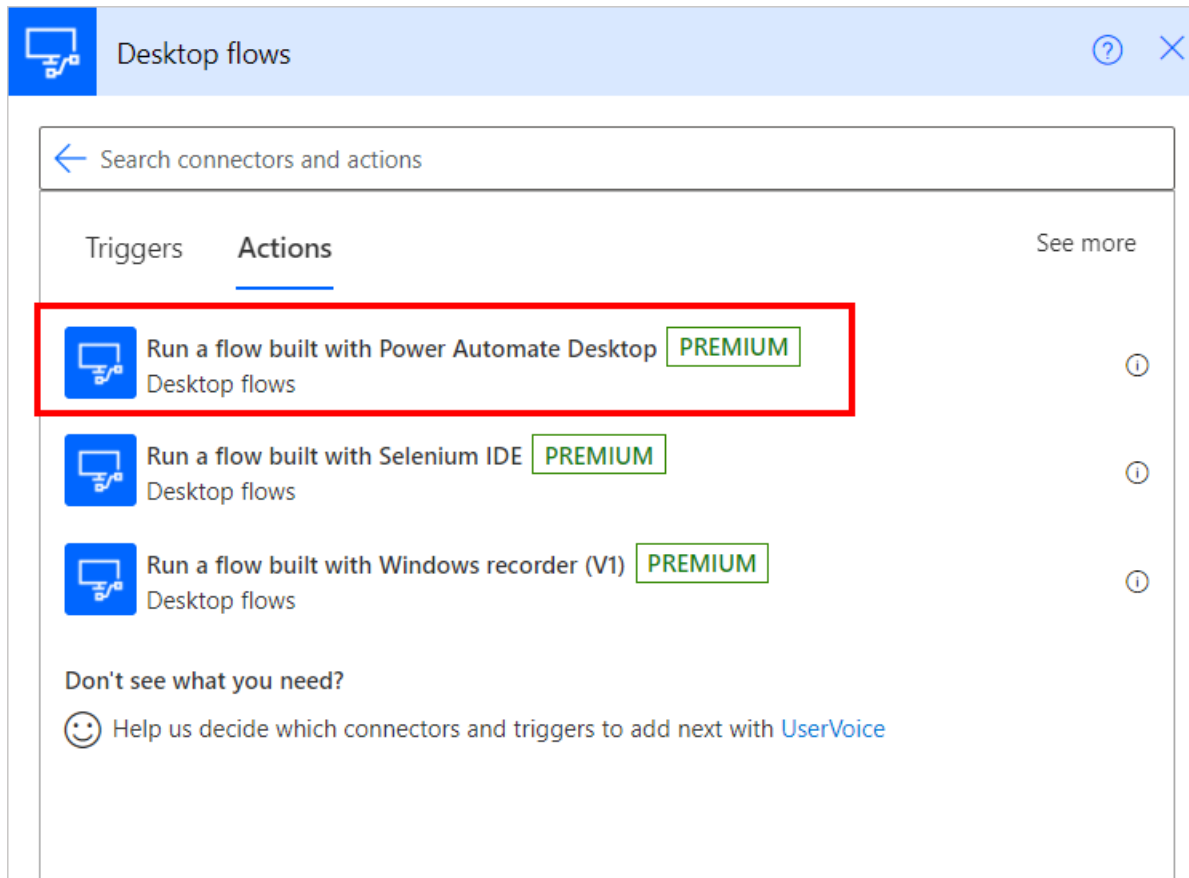
+ New step

Save

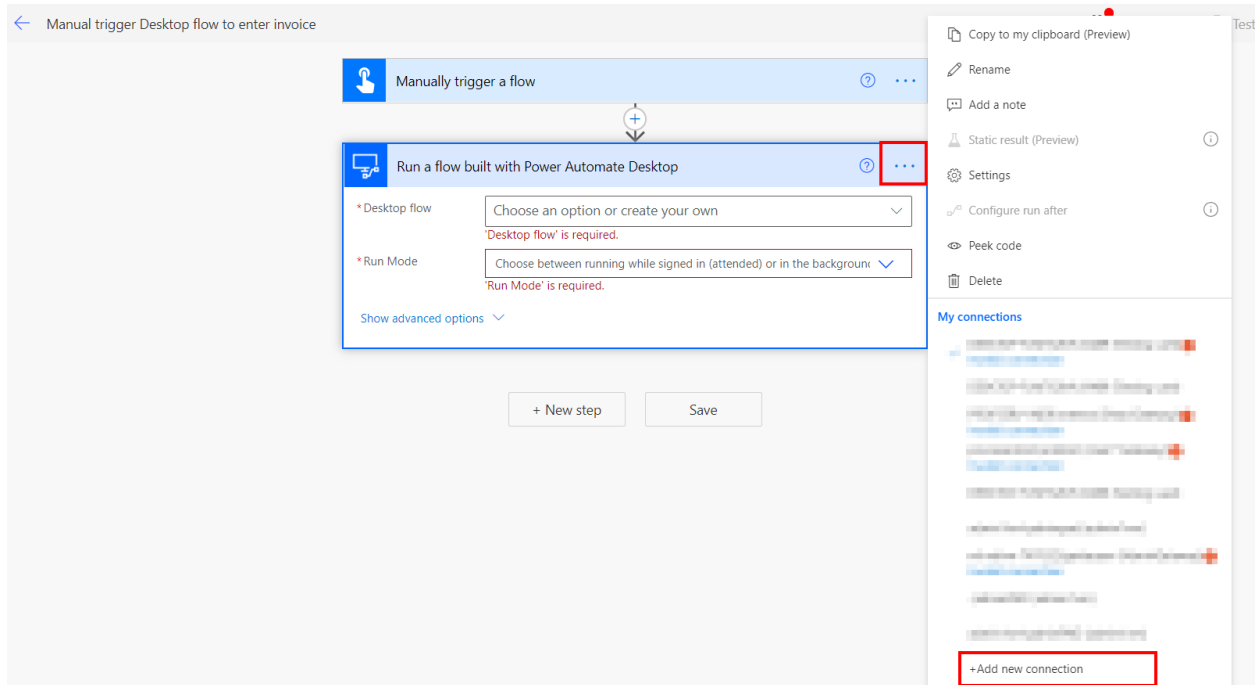
6. Enter **desktop flow** in the search box and choose **Desktops flows**.



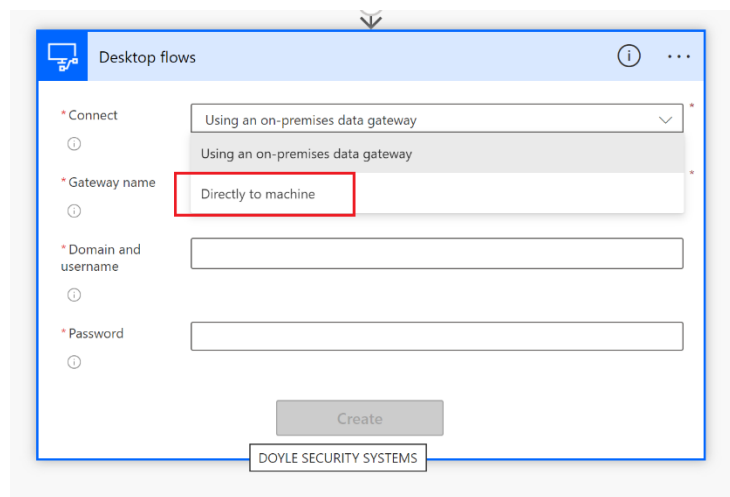
7. Select **Run a flow built with Power Automate Desktop**.



8. If you've already created a connection with desktop flows, click the three dots ... in the top right and under **My connections** to select the correct desktop flow connection or select **+Add new connection** to create a new connection.



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



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

Desktop flows

* Connect: Directly to machine

* Machine or machine group: Select an item

Search: MININT-TUSHI4F

* Domain and username:

* Password:

Create

11. 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 Start, 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 into this computer.

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

Desktop flows

* Connect Directly to machine

* Machine or machine group MININT-TUSHI4F

* Domain and username Domain\Username

* Password

Create

12. Click **Create**.

Desktop flows

* Connect Directly to machine

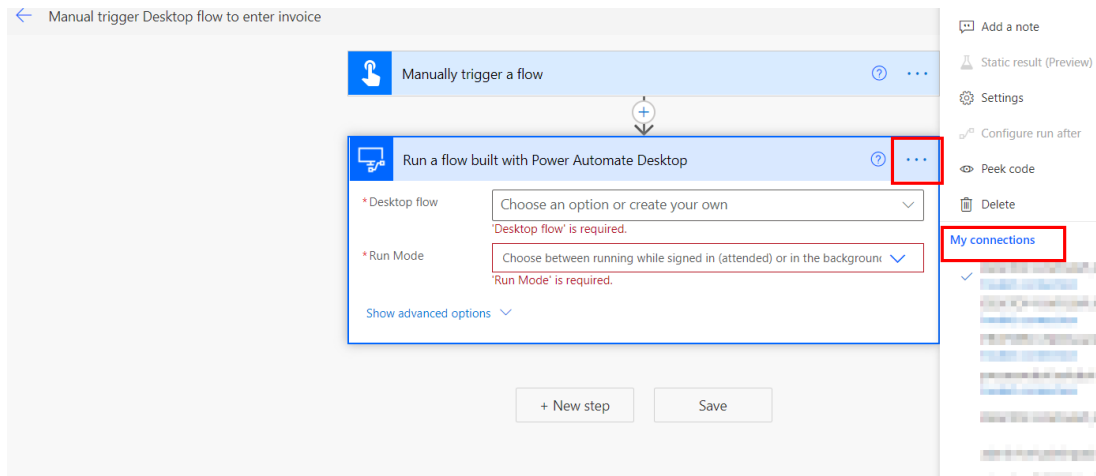
* Machine or machine group MININT-TUSHI4F

* Domain and username Domain\Username

* Password

Create

13. After setup the connection, you can always see and select your connection under **My connections** by clicking the click **the three dots ...**



14. Under **desktop flow**, select **Enter an invoice** desktop flow that you have created in previous lab.

Run a flow built with Power Automate Desktop

* Desktop flow: **Enter an invoice** Edit

* Run Mode: Choose between running while signed in (attended) or in the background ▼
 'Run Mode' is required.


Amount:

Contact:

Account name:

[Show advanced options](#) ▼

15. 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.

 Run a flow built with Power Automate Desktop ? ...

* Desktop flow	Enter an invoice ▼ Edit
* Run Mode	Attended - Runs when you're signed in ▼
Amount	Amount
Contact	Contact Email
Account name	Account name

[Show advanced options](#) ▼

16. Fill the box with these input values: (note we are using static input values for now and will learn in next labs how to use dynamic input values)

- **Amount:** \$200
- **Contact:** b.friday@wingtiptoy.com
- **Account name:** WingTip Toys

Then click **Save**.

Manually trigger a flow

Run a flow built with Power Automate Desktop

* Desktop flow: Enter an invoice Edit

* Run Mode: Attended - Runs when you're signed in

Amount: \$200

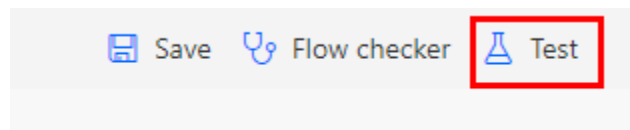
Contact: b.friday@wingtiptoy.com

Account name: WingTip Toys

[Show advanced options](#)

+ New step Save

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



18. Select **Manually**. Then click **Test**.

Test Flow ✕

☒ **Manually**
Perform the starting action to trigger it.

☐ **Automatically**

Test Cancel

19. If you see a green check, you are ready to go. Click **Continue**.


Run flow ✕

Manual trigger Desktop flow to enter invoice

Owner: Chris Lan

Sign in

This flow uses the following apps. A green check means you're ready to go.

 Desktop flows ✓ ...

Continue Cancel

20. Click **Run flow**.

This flow uses Desktop flows.
[Review connections and actions](#)



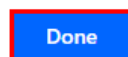
21. Click **Done** if your flow run successfully started.

Note: Do not interact with your device while testing.

Run flow

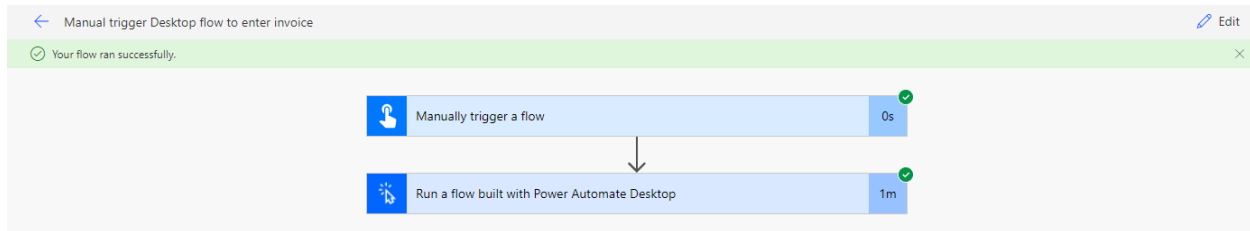


Your flow run successfully started. To monitor it,
go to the [Flow Runs Page](#).



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

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



Tip: If the flow run failed at the desktop flow step, **always** go to the desktop flow page, click into the desktop flow just ran, and look up run history from there to see detail error messages. This will help you troubleshooting and fix the run.

Flows

Cloud flows **Desktop flows** Business process flows Shared with me

	Name	Modified	Built with
	Enter an invoice	2 d ago	Power Automate Desktop

Desktop flows > Enter an invoice

Details

Edit

Flow
Enter an invoice

Owner
Chris Lan

Created
Dec 10, 03:10 PM

Modified
Dec 11, 05:39 AM

Built with
Power Automate Desktop

Run history

 All runs

Requested	Duration	Status
Dec 13, 10:53 PM (5 min ago)	00:01:02	Succeeded
Dec 13, 10:52 PM (6 min ago)	00:00:28	Failed

Monitor the list of machines

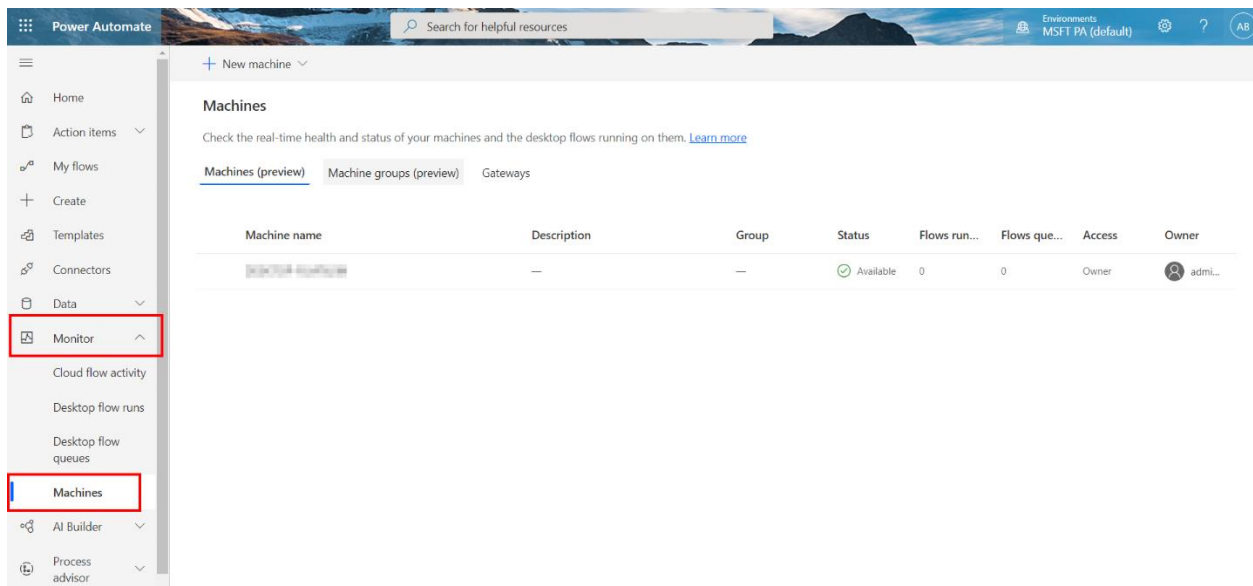
Once a machine is registered to an environment, you can view its details at any time in Power Automate. You can also view all other machines that you have access to.

24. Open the test profile in a browser and navigate to powerautomate.microsoft.com.

25. Select **Monitor**, then select **Machines**.

Within the list, for each machine you can view:

- The name of the machine.
- The 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.

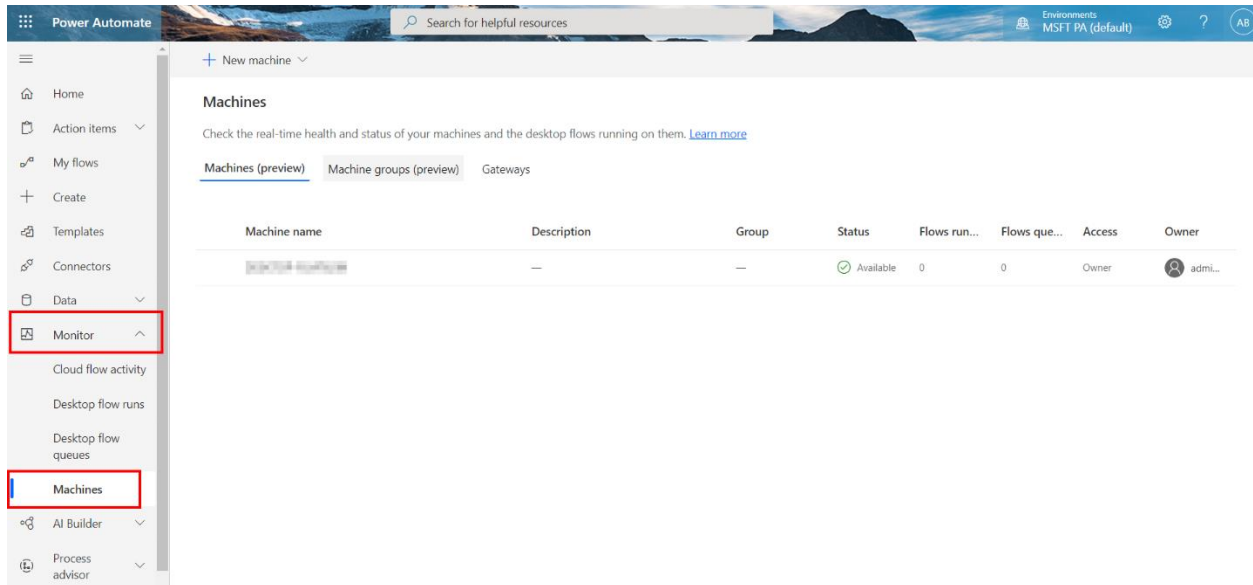


Share a machine

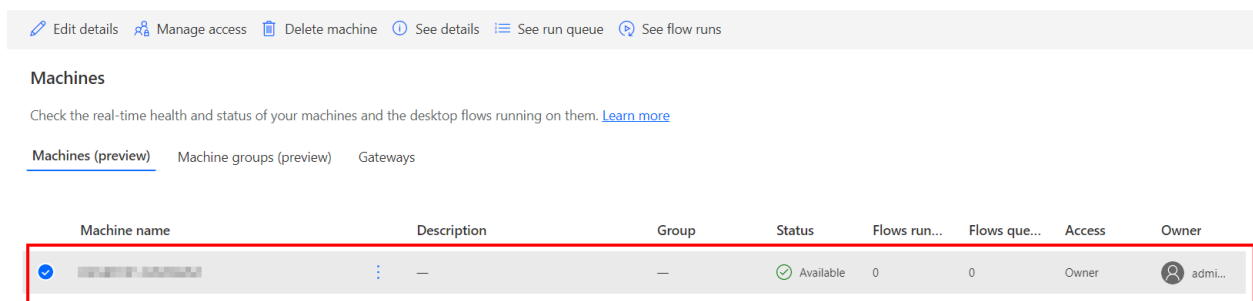
You can share a machine with other users in your organization, giving those users specific permissions to access your machine.

26. Open the test profile in a browser and navigate to powerautomate.microsoft.com.

27. Select **Monitor**, then select **Machines**.



28. Select your machine from the list.



29. Select **Manage access**.

[Edit details](#) **Manage access** [Delete machine](#) [See details](#) [See run queue](#) [See flow runs](#)

Machines

Check the real-time health and status of your machines and the desktop flows running on them. [Learn more](#)

[Machines \(preview\)](#) [Machine groups \(preview\)](#) [Gateways](#)

	Machine name	Description	Group	Status	Flows run...	Flows que...	Access	Owner
✓	XXXXXXXXXX	—	—	✓ Available	0	0	Owner	admi...

30. Select the **Add people** field, then enter the name of the person in your organization with whom you'd like to share the machine.

Manage access

Choose who can use your machine and set their permissions.

Lan Li

LL

Lan Li

AB

admin bot
Owner

Your machine hasn't been shared. Add people to get started.

Save

Cancel

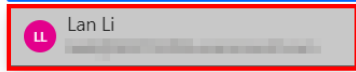
31. Select the name of the person to choose with which permissions they can access the machine.

Manage access



Choose who can use your machine and set their permissions.

Lan Li



admin bot
Owner

Your machine hasn't been shared. Add people to get started.

Save

Cancel

32. Click **Save**.

Manage access



Choose who can use your machine and set their permissions.

Add people

New



Lan Li
User



Shared with

Sort by Name



admin bot
Owner

Select or add people to set their permissions.

Save

Cancel

33. 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

✓

LL

Lan Li
User

×

Shared with

Sort by Name

AB

admin bot
Owner

Lan Li

☒ 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	

Check your knowledge

Lab 5

7 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

Answer: A. Environment user

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

- A. True
- B. False

Answer: A. True, you can find detail 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 Start, 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

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.

© 2021 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 property of their respective owners.