Microsoft

# Robotic Process Automation in a Day

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

60 mins

October 2021

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## 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 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**.

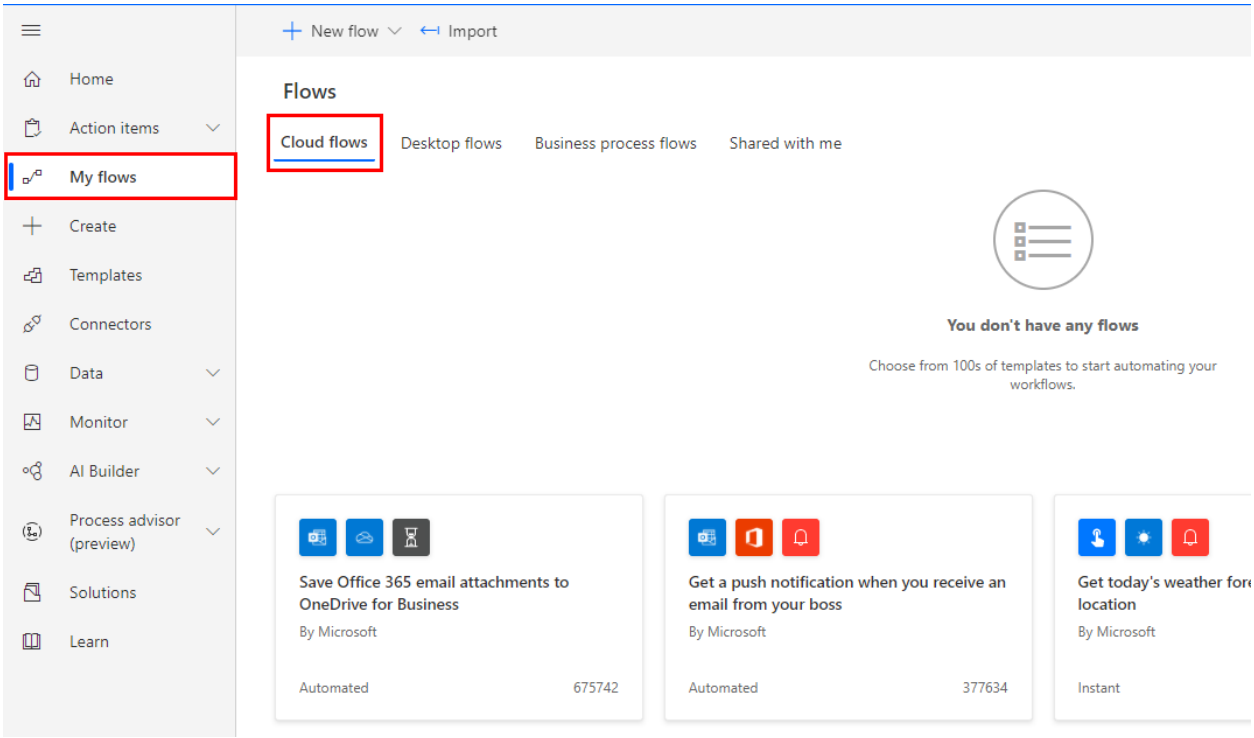
# Register a new machine

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

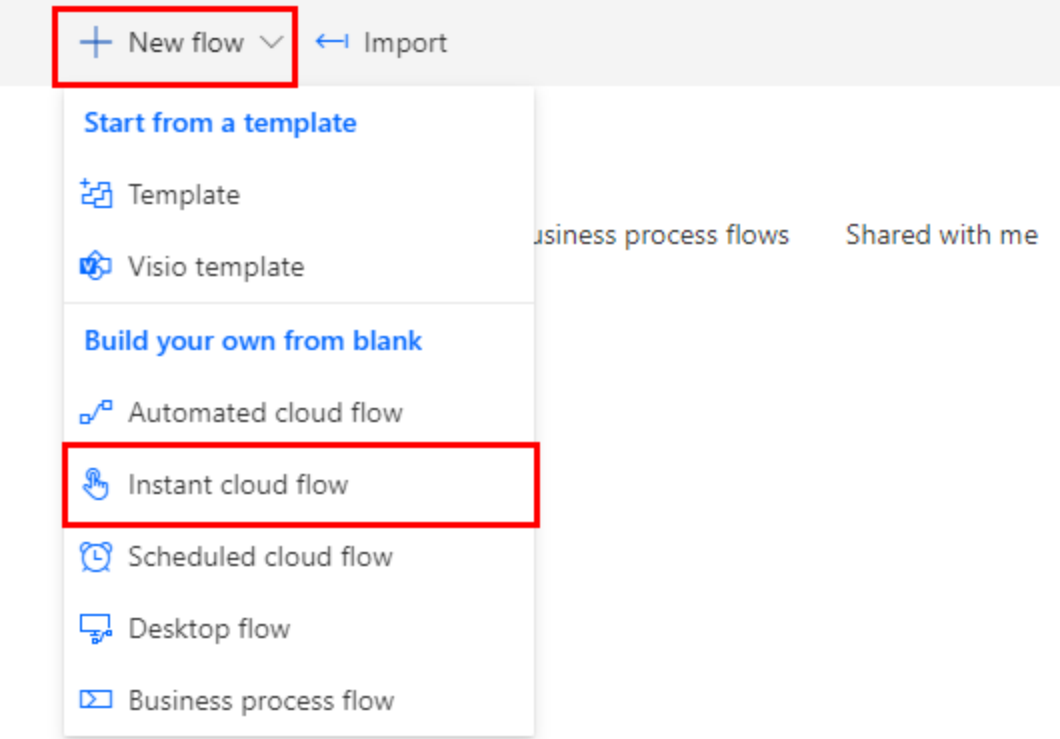
# Trigger a desktop flow to run on your machine

**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

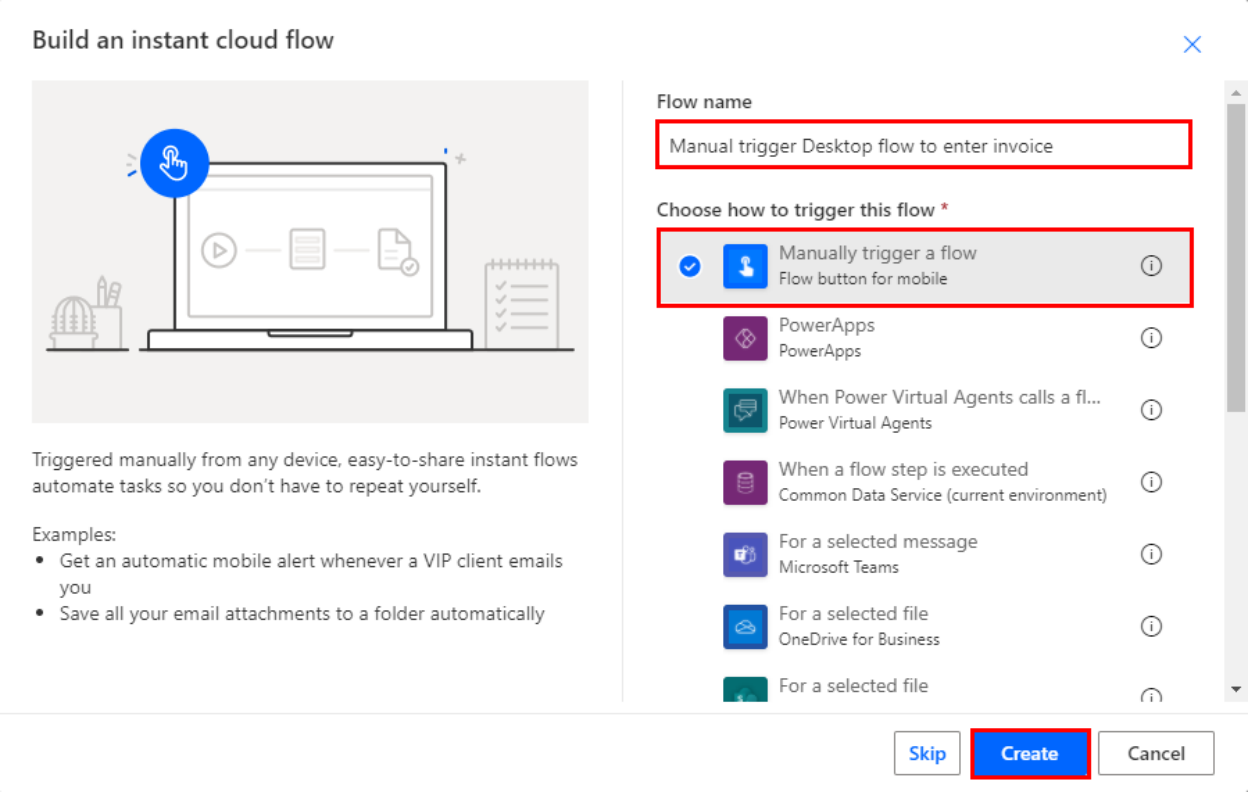
1. Open the test profile in a browser and navigate to https://powerautomate.microsoft.com.
2. Select **cloud flows**.



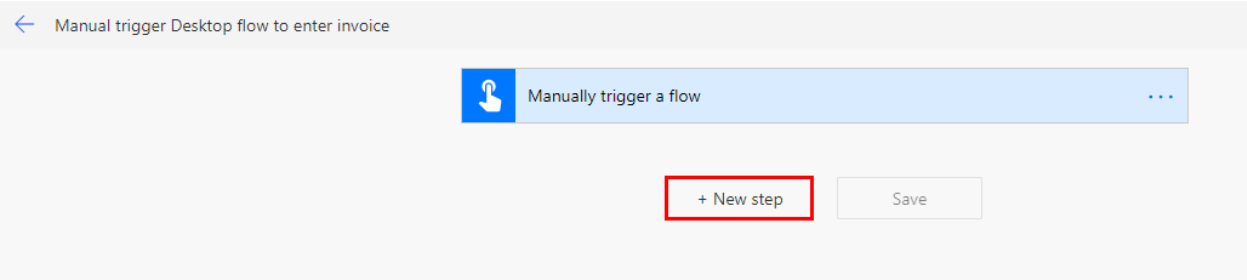

3. Select **New flow**, then select **Instant cloud flow**.



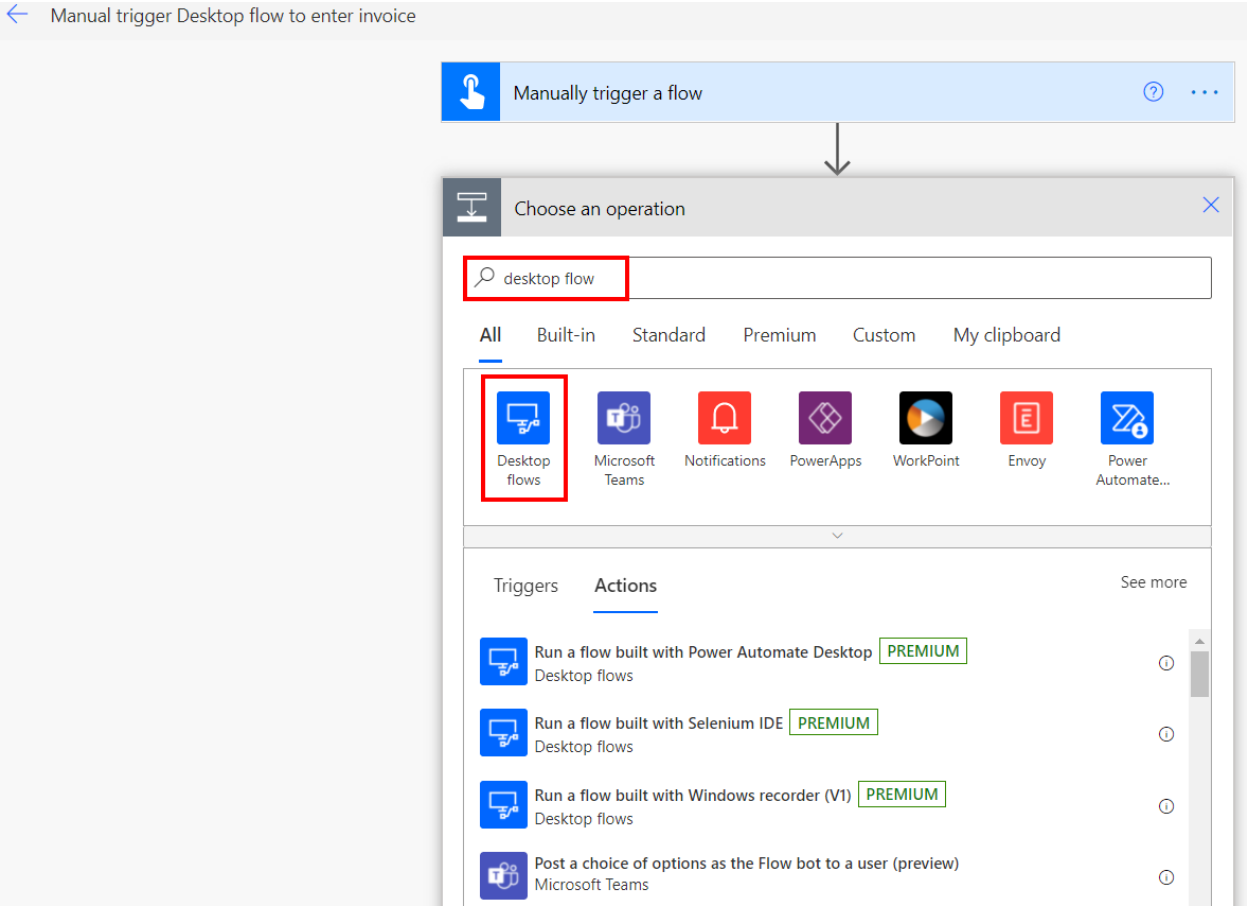

4. Name the flow **Manual trigger desktop flow to enter invoice**, choose **Manually trigger a flow**. Then select **Create**.



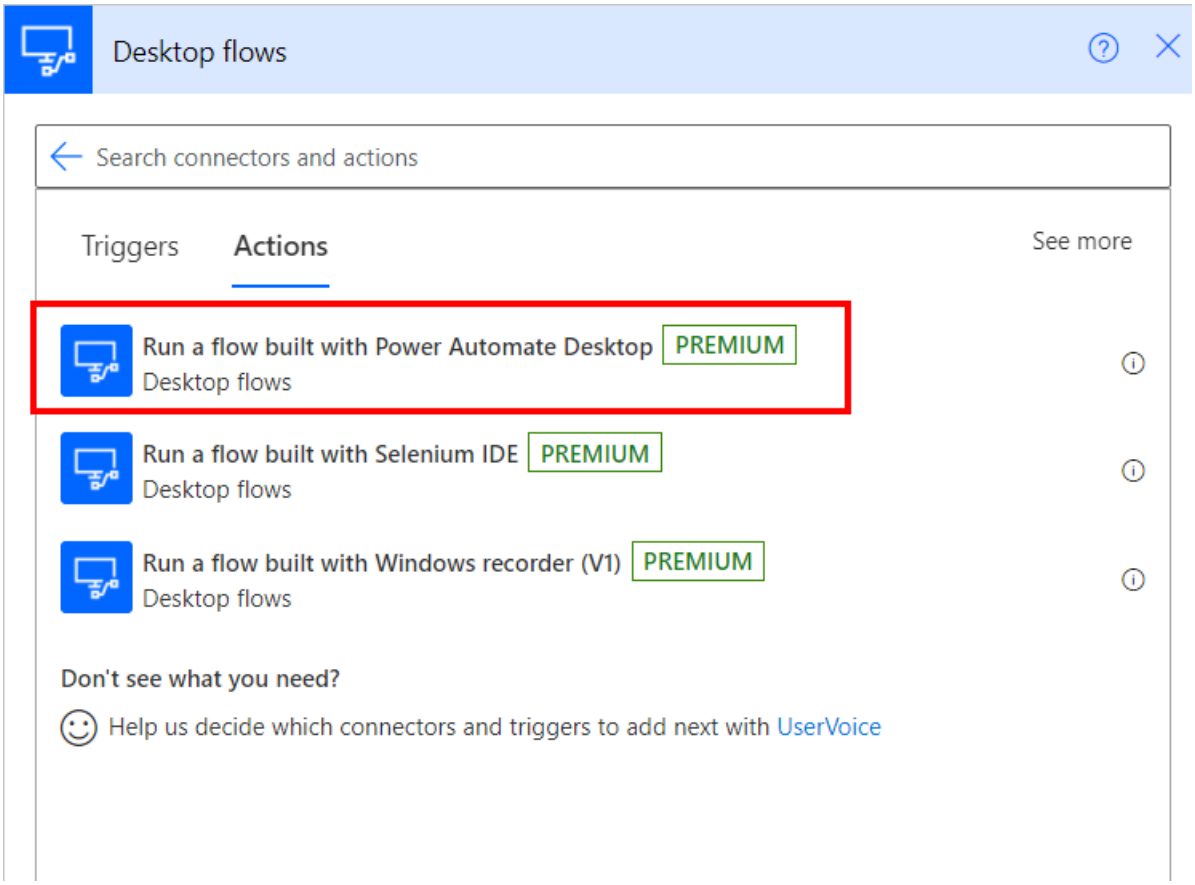

5. Add a step by clicking **+ New step**.



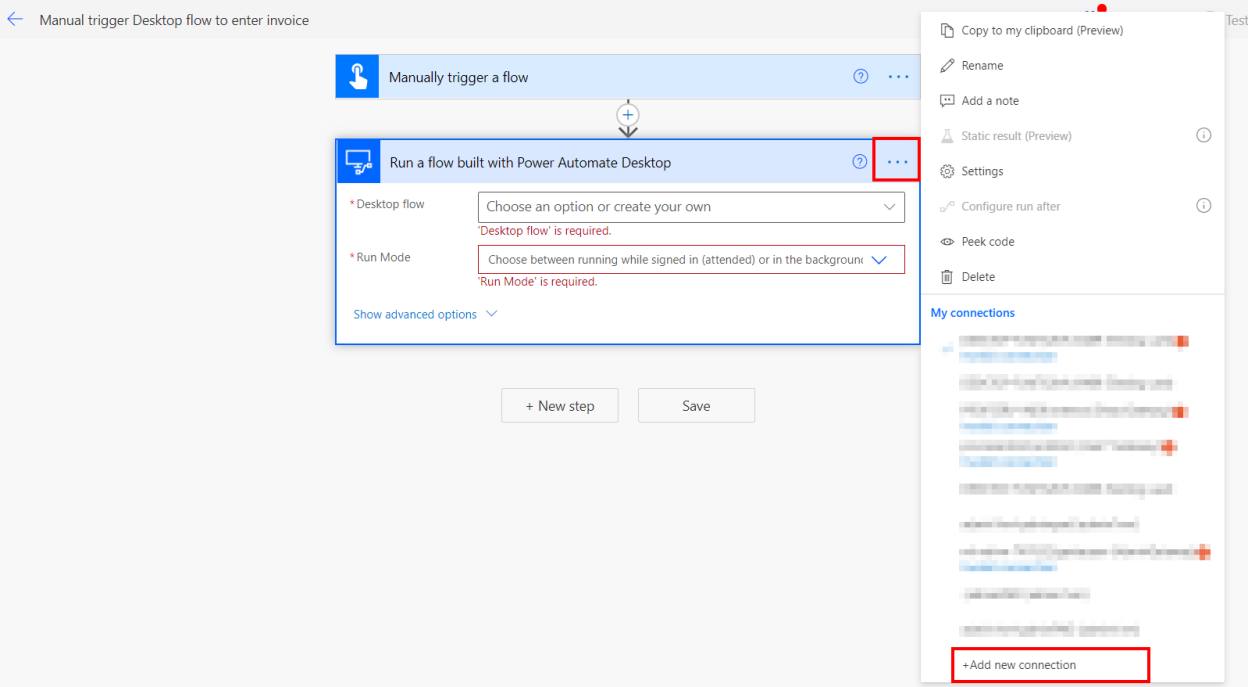

6. Enter **desktop flow** in the search box and choose **Desktops flows**.



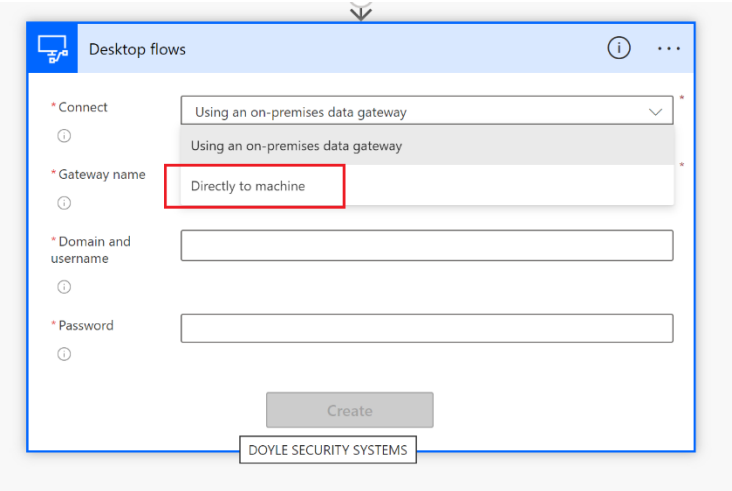

7. Select **Run a flow built with Power Automate Desktop**.



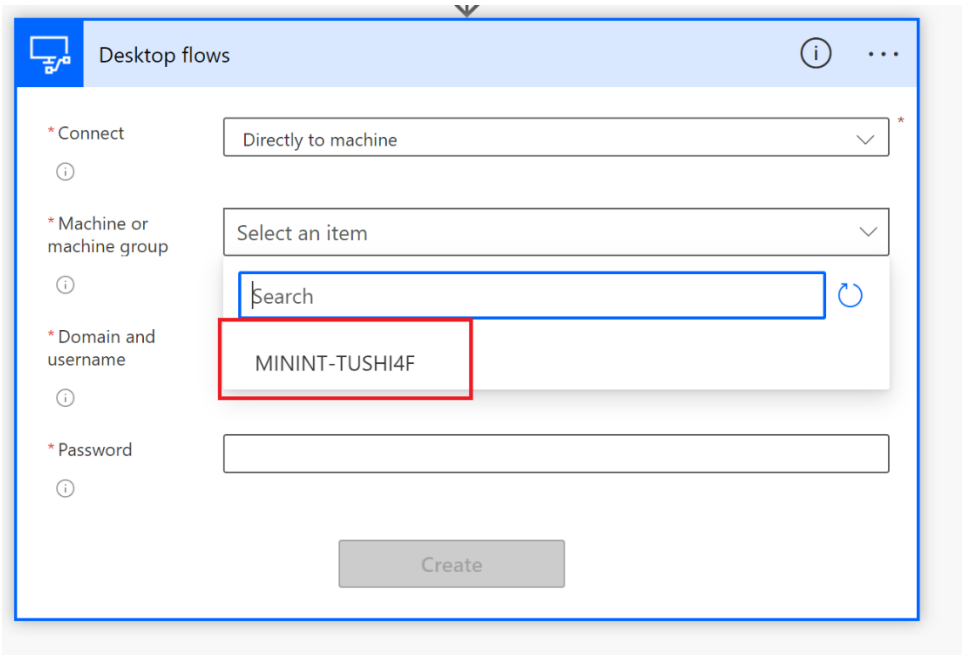

8. If you've already created a connection with desktop flows, click the three dots **...** in the top right and under **My connections** to select the correct desktop flow connection or select **+Add new connection** to create a new connection.




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 conenction. In the dropdown box next to **Connect**, select **Direct to machine**




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



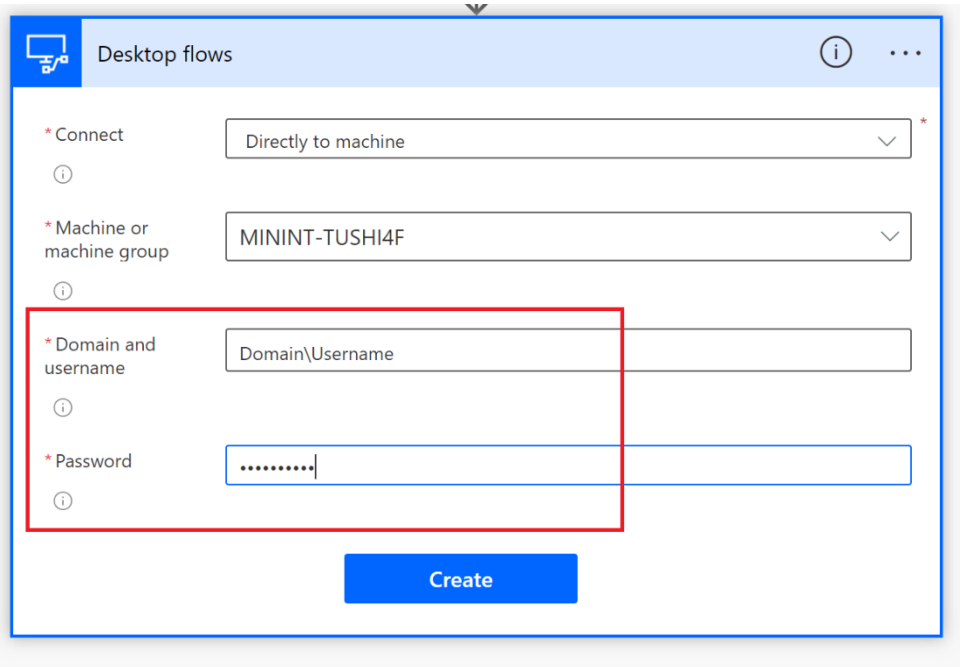

11. Enter the username and password you would use to sign into your machine under **Domain username** and **Password**.

**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**.

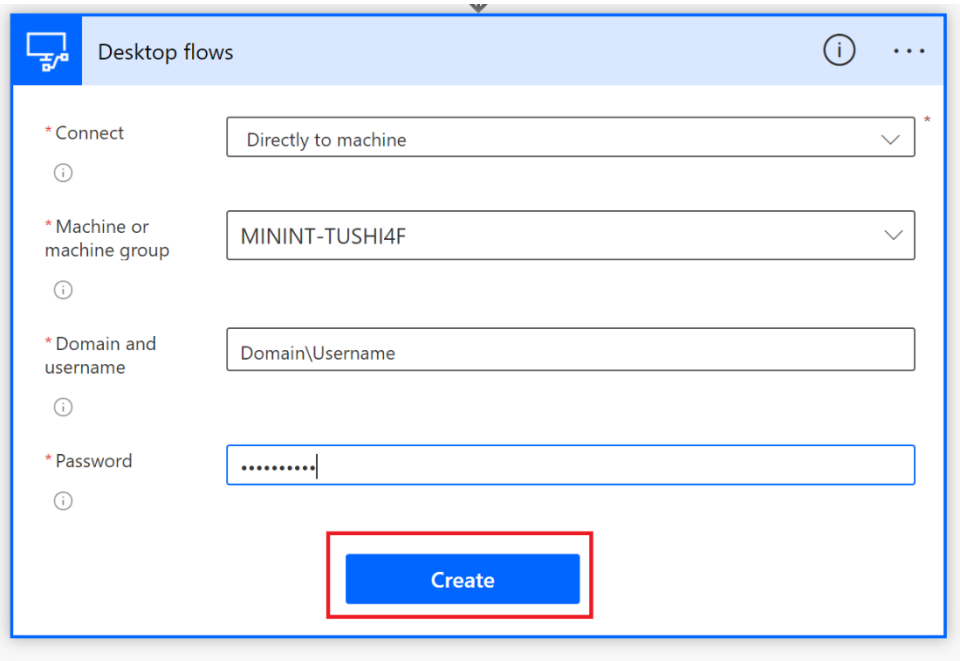
If this is not a domain account, then use the "**Set computer**" command to look for the computer name. Fill in the text with **COMPUTERNAME\USERNAME**.

**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.

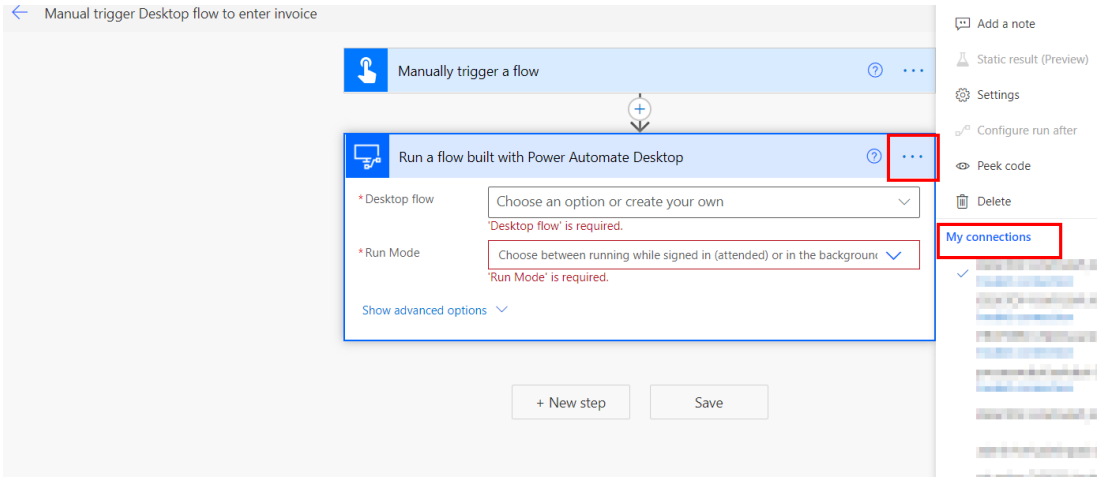
**Important:** The account you will use must have local admin rights on your machine.



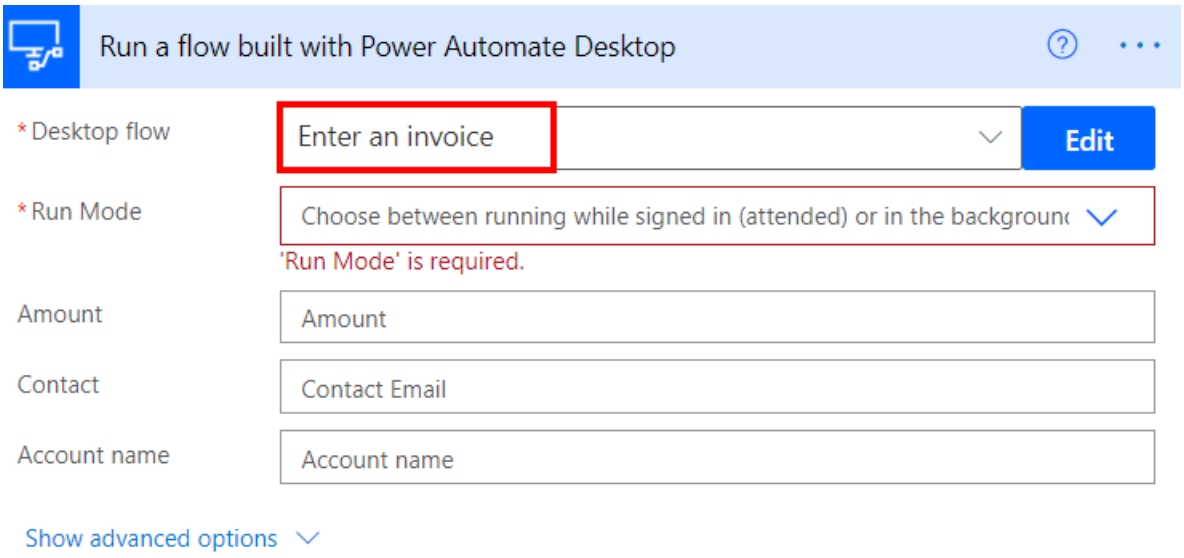

12. Click **Create**.



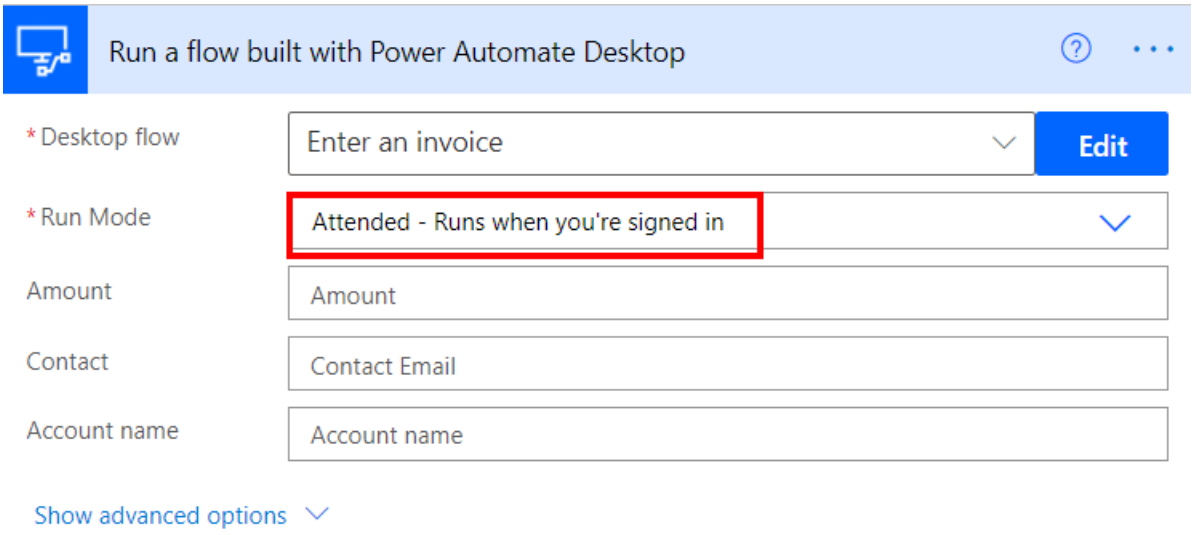

13. After setup the connection, you can always see and select your connection under **My connections** by clicking the click **the three dots** …




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

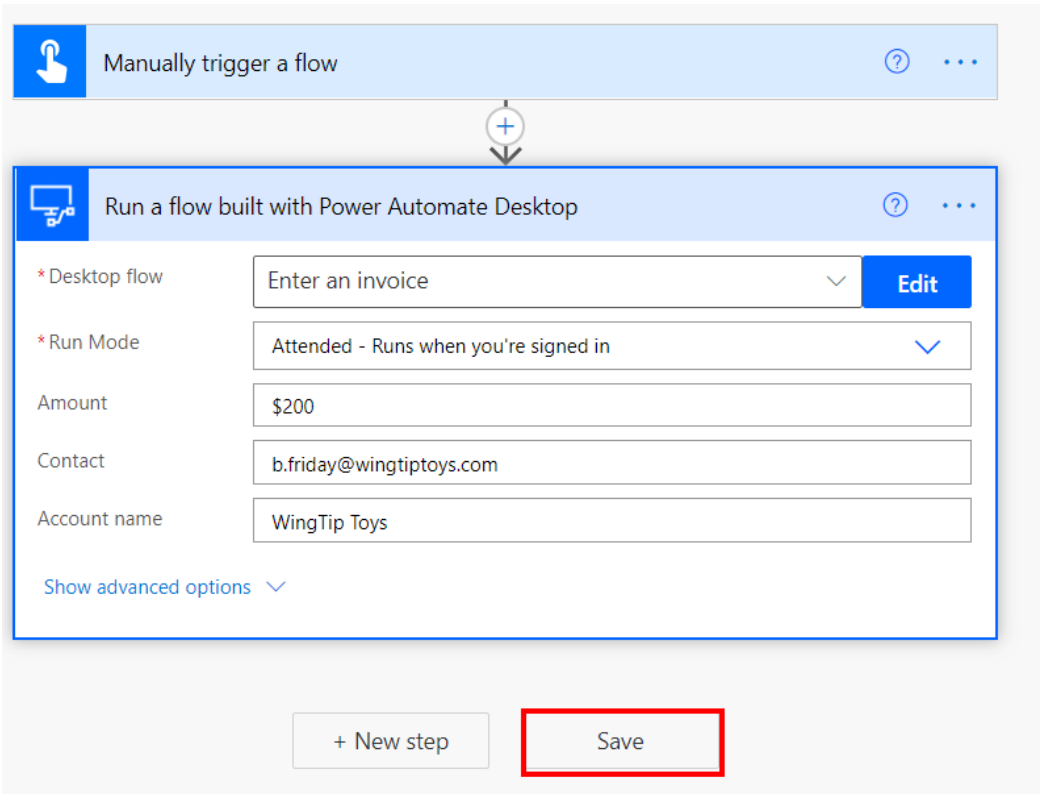



15. Under **Run Model**, select **Attended – Runs when you're signed in**. This mode will run the desktop flow while you are signed in the same machine.

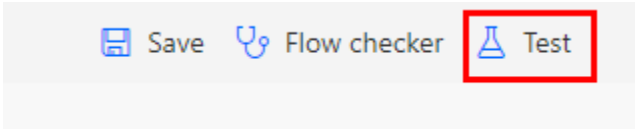



16. Fill the box with these input values: (note we are using static input values for now and will learn in next labs how to use dynamic input values)
    - **Amount**: $200
    - **Contact**: b.friday@wingtiptoys.com
    - **Account name**: WingTip Toys

Then click **Save**.

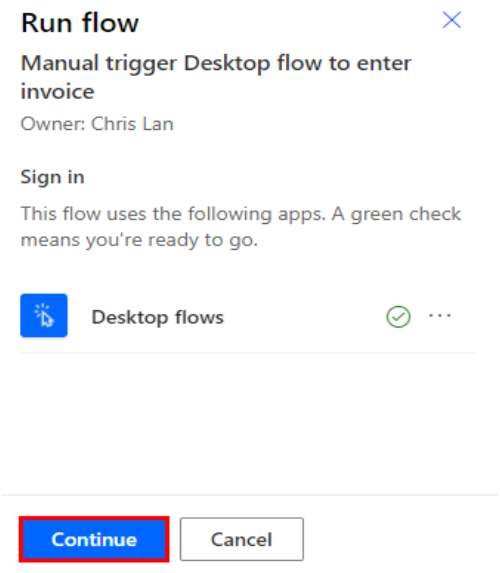



17. Select **Test** at the top-right of the screen.

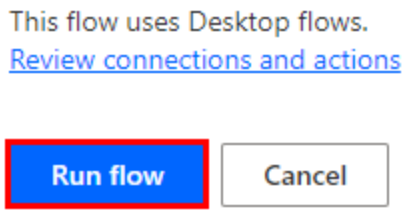



18. Select **Manually**. Then click **Test**.

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




20. Click **Run flow**.

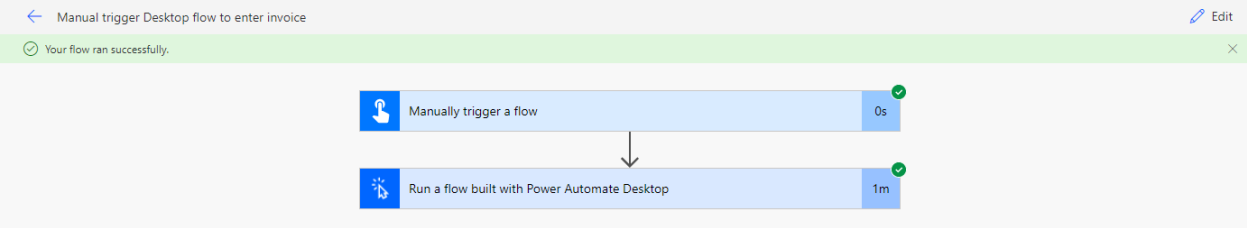



21. Click **Done** if your flow run successfully started.

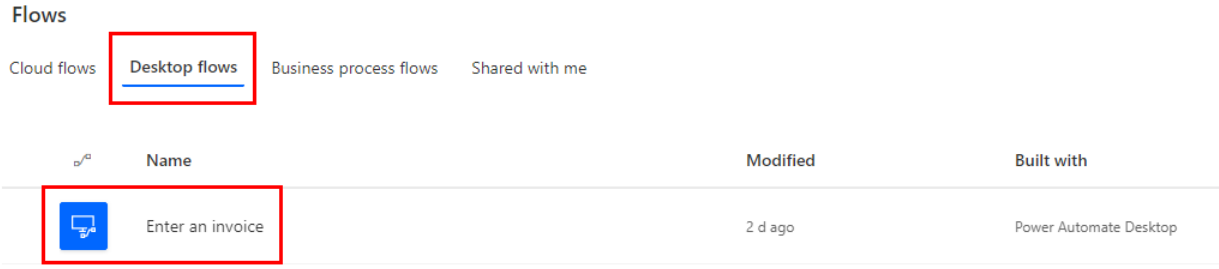
**Note:** Do not interact with your device while testing.

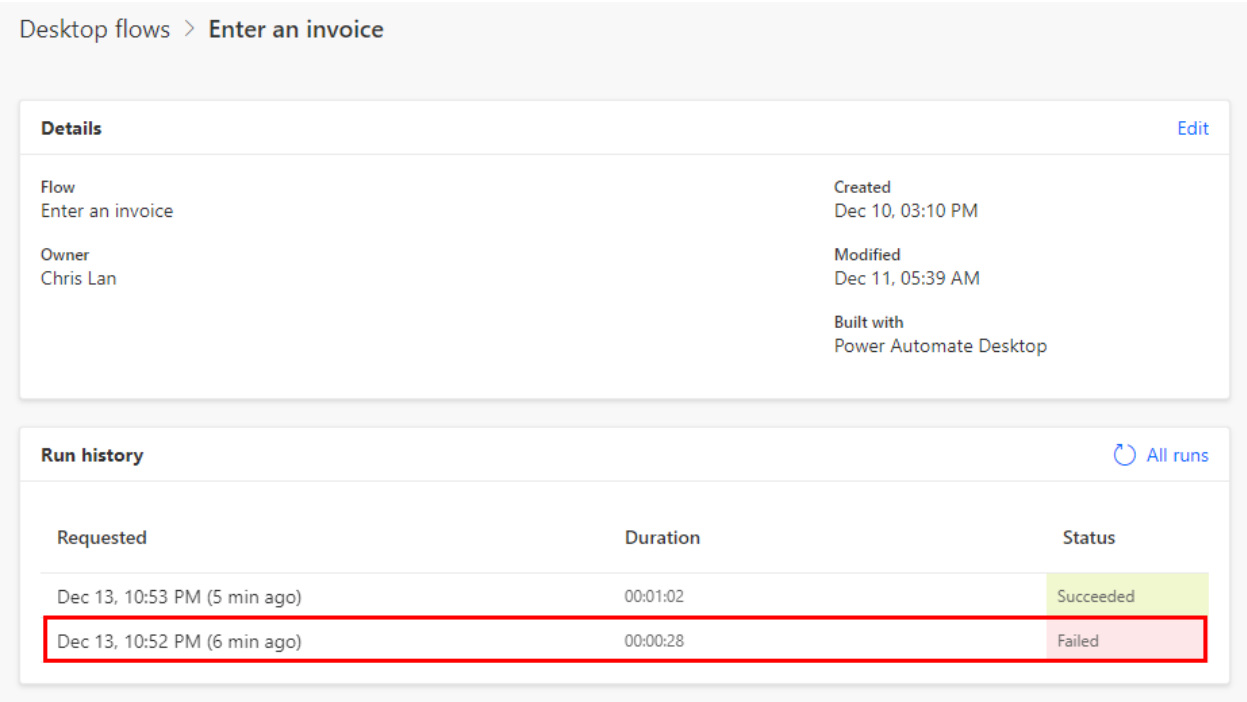
22. Watch your desktop flow will be triggered from the cloud and run on your desktop

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.



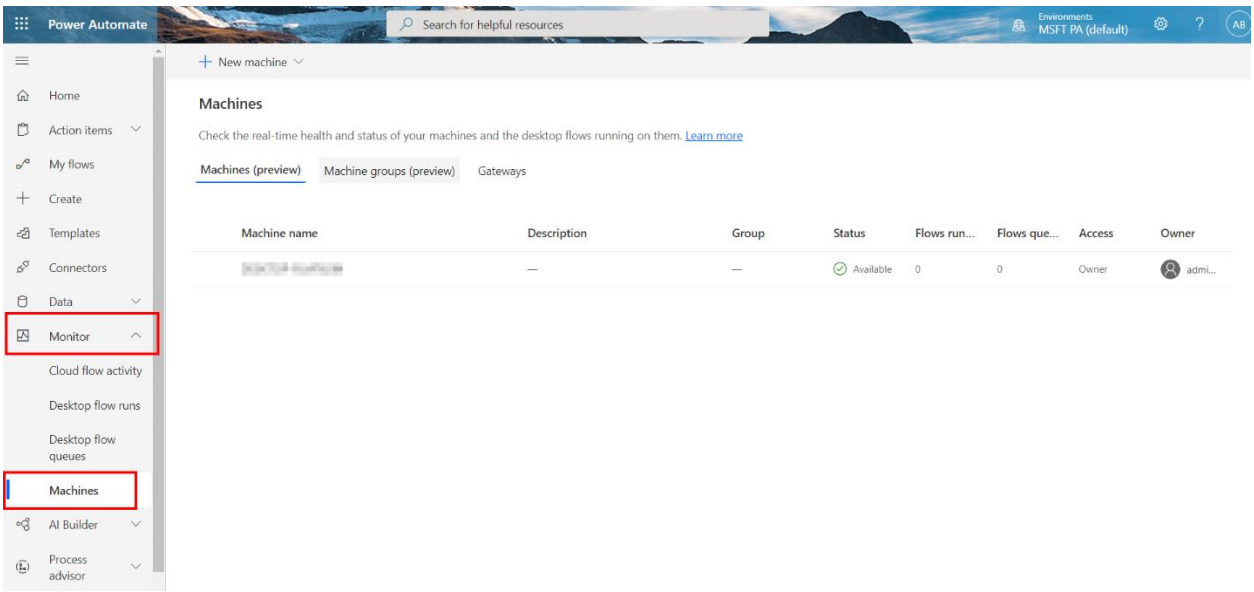
# Monitor the list of machines

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:

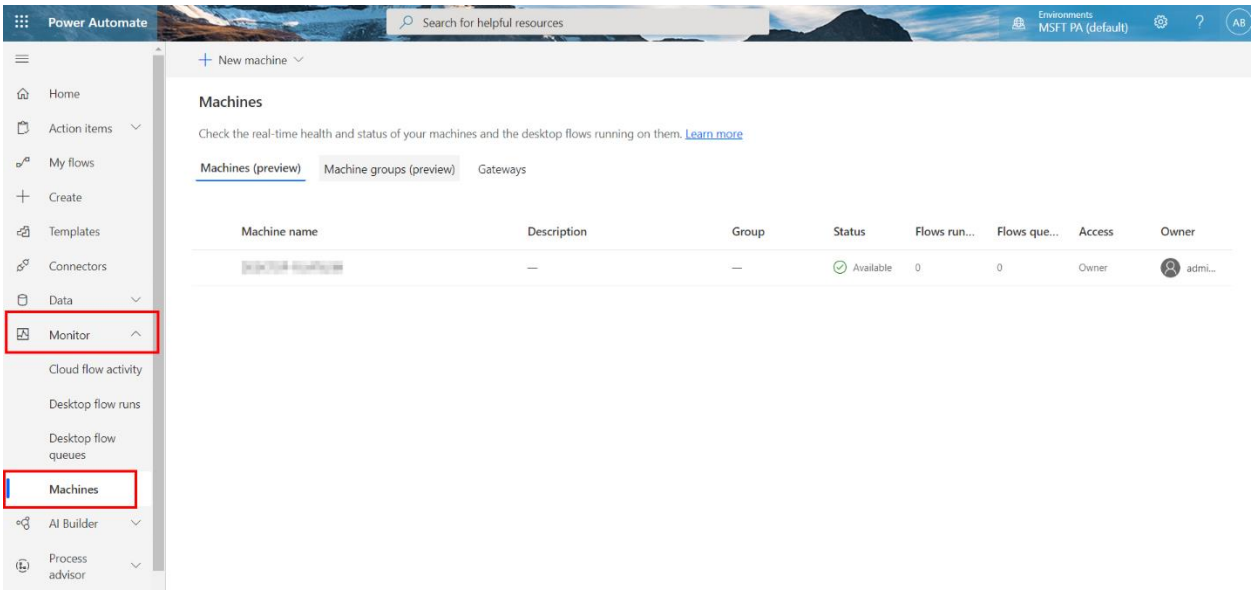
    - The name of the machine.
    - The description of the machine.
    - The group that the machine is a part of, if applicable.
    - The status of the machine.
    - The number of flows running on the machine.
    - The number of flows queued on the machine, if applicable.
    - The type of access you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



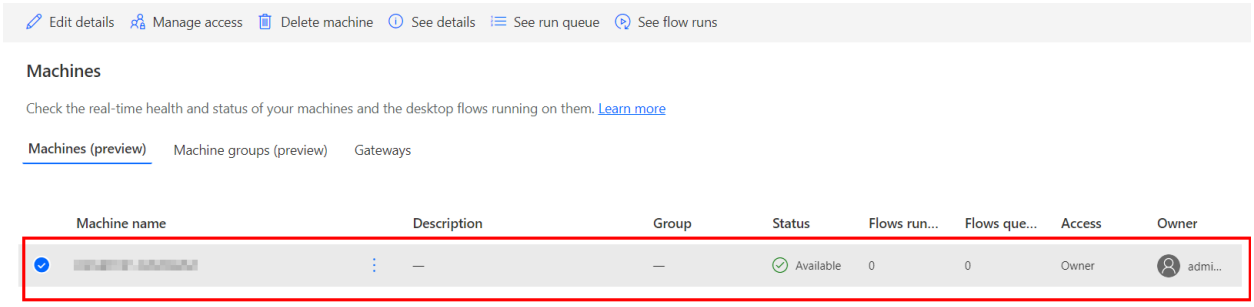
# Share a machine

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

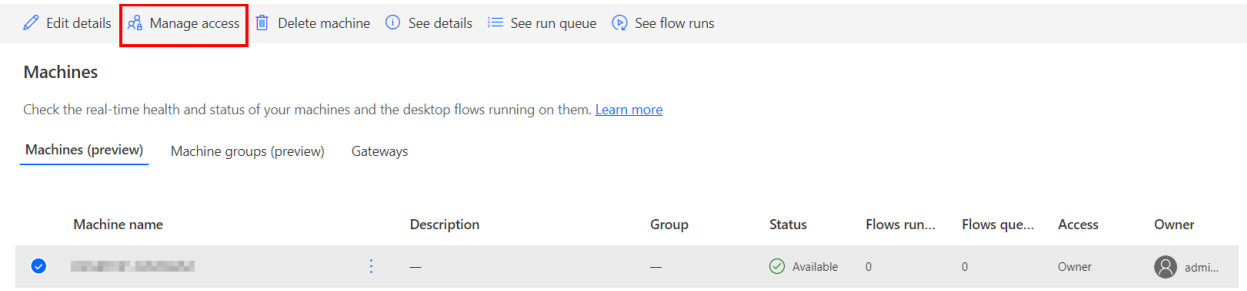
26. Open the test profile in a browser and navigate to [powerautomate.microsoft.com](powerautomate.microsoft.com).
27. Select **Monitor**, then select **Machines**.



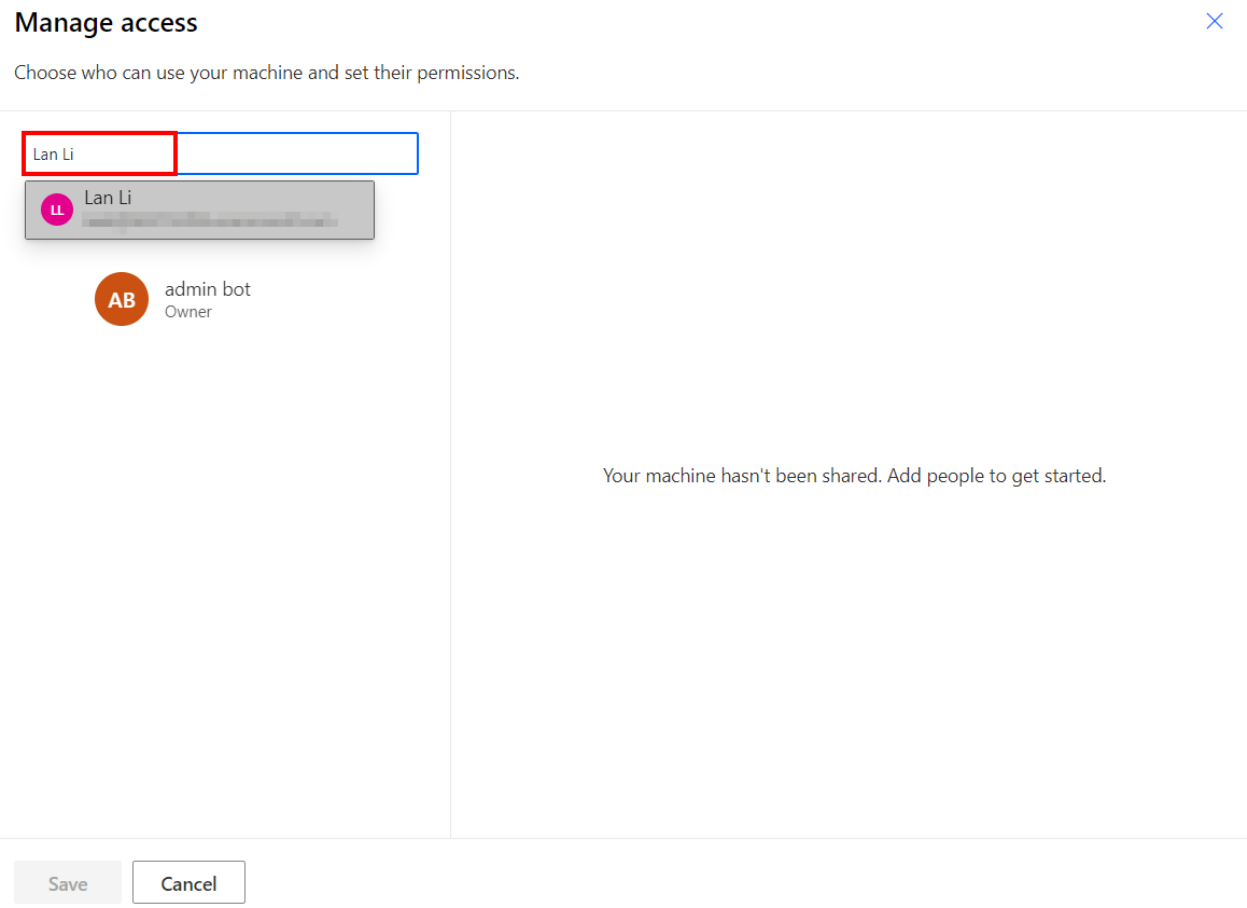

28. Select your machine from the list.



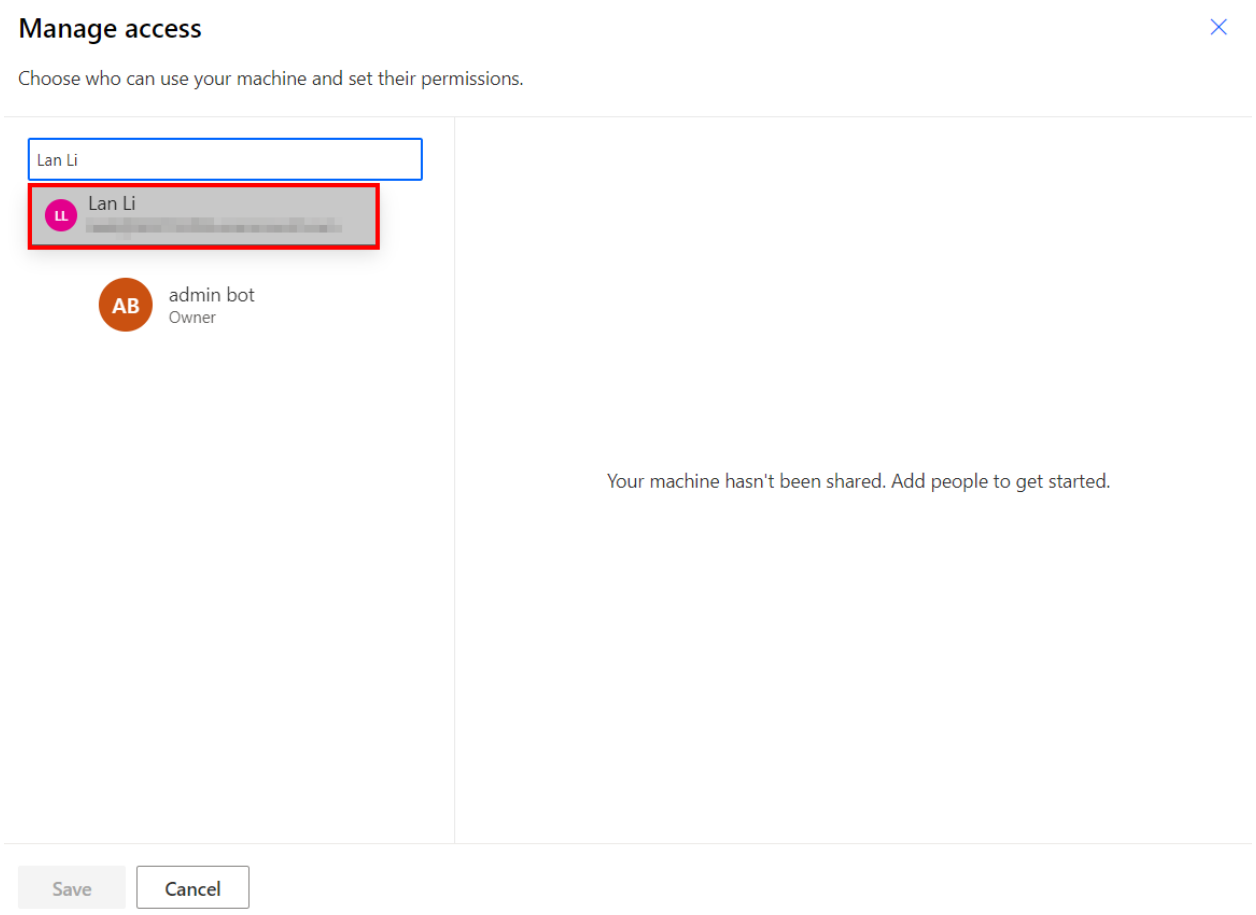
29. Select **Manage access**.



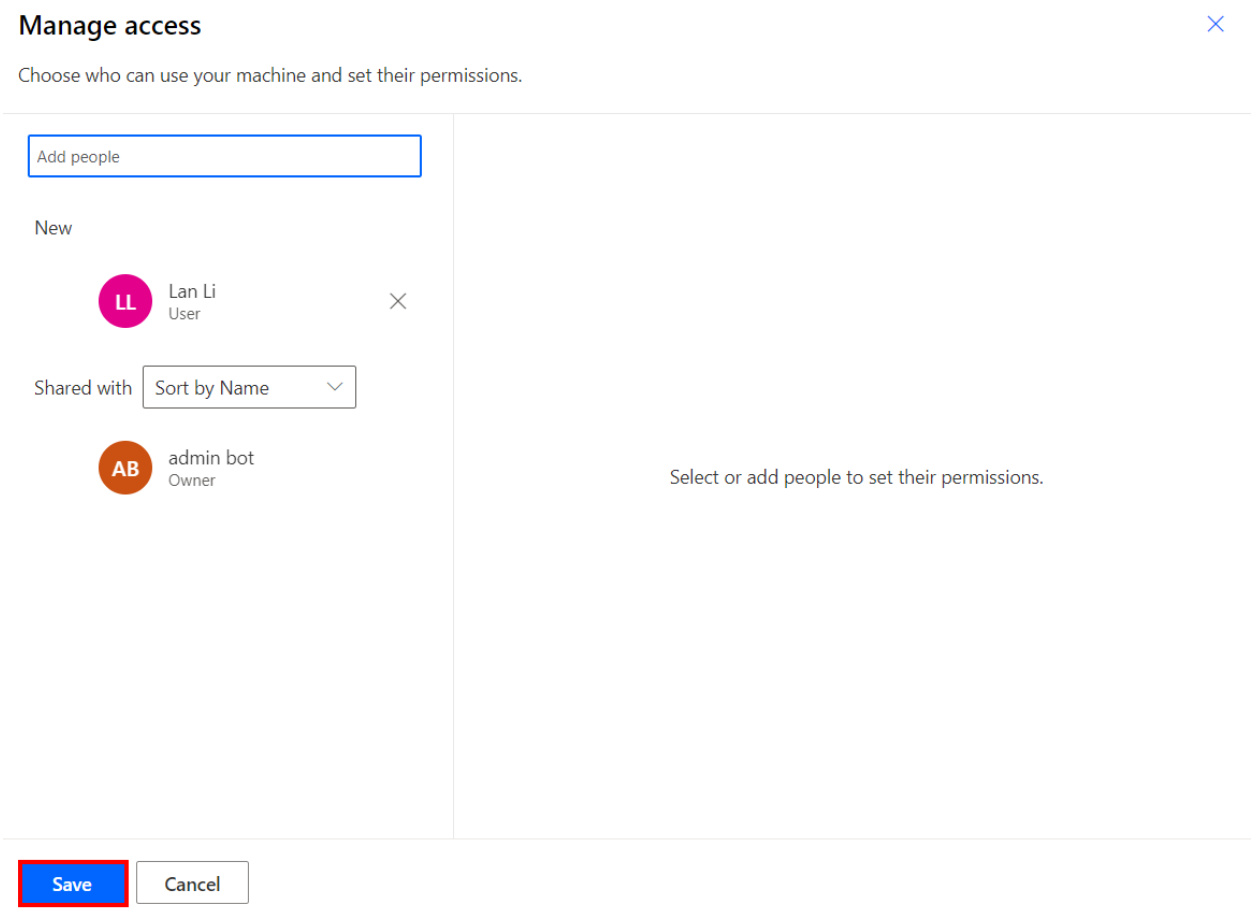

30. Select the **Add people** field, then enter the name of the person in your organization with whom you'd like to share the machine.



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

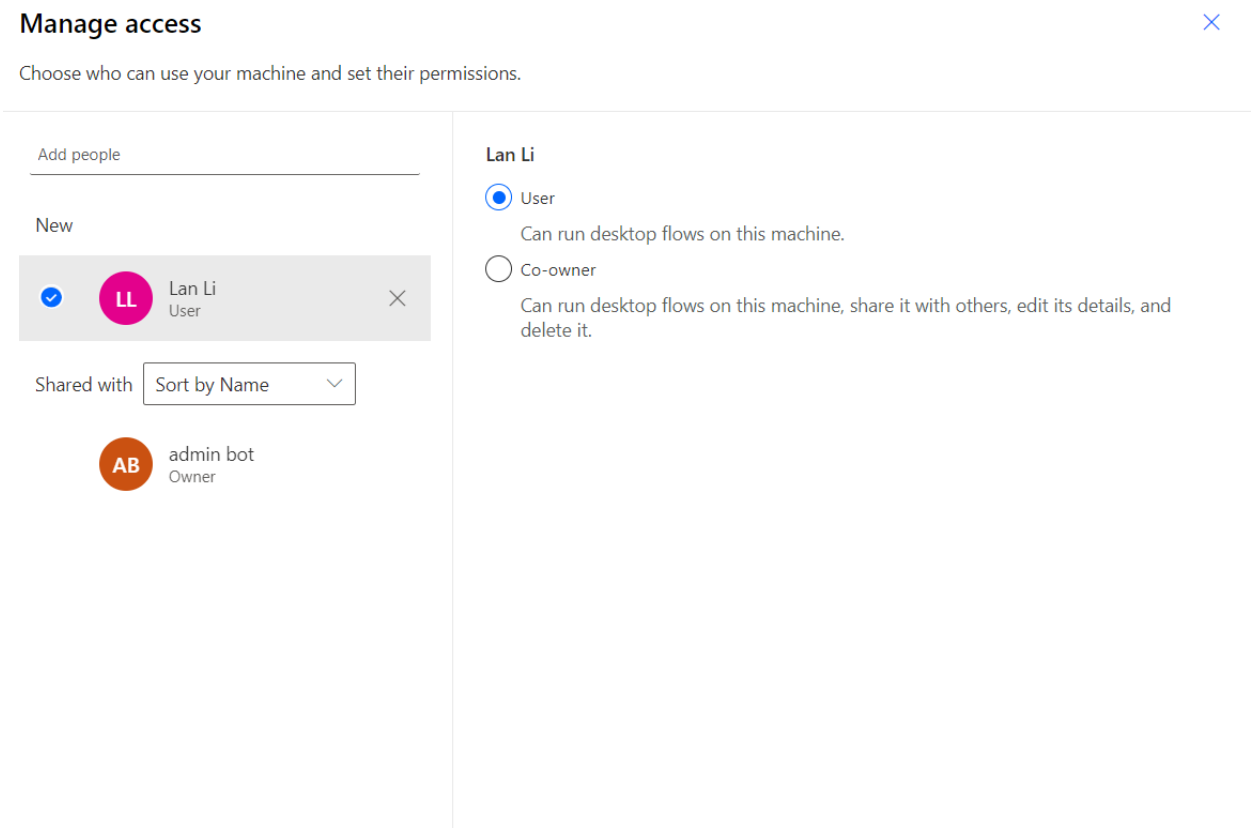


32. Click **Save**.



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.



| 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

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