Microsoft

Robotic Process Automation in a Day

Lab prerequisites 1.3 – Install required software

30 mins

October 2021

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Pre-requisite task 1.3: 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 Desktop (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 Desktop (PAD) app already installed and machine registered, check that 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.

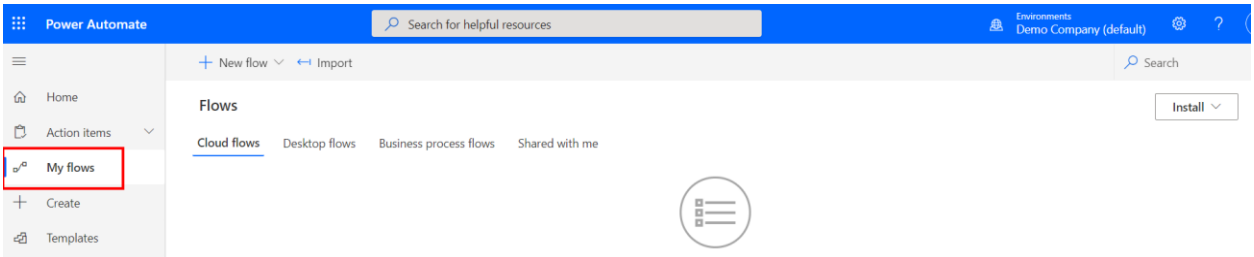
Note: If you have previously installed the legacy UI flows or Softomotive RPA software, it is recommended to **uninstall/remove** all browser extensions from Chrome, Edge, Firefox etc.

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

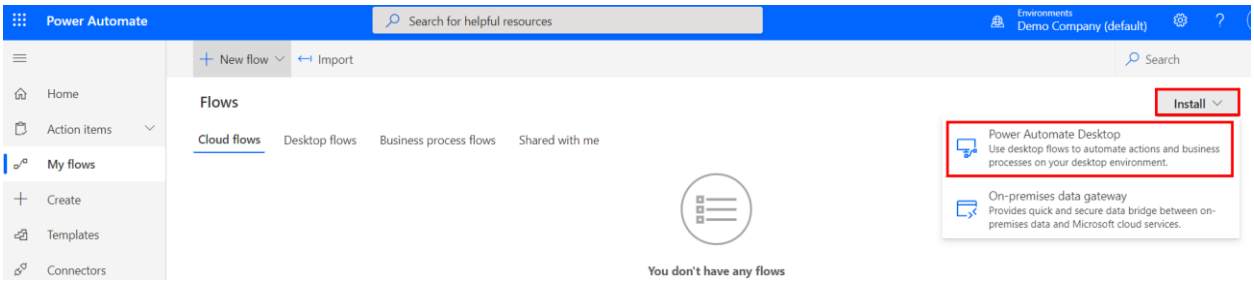
Install Power Automate Desktop application

1. Navigate to https://powerautomate.microsoft.com/ and sign in with the account you are using for the labs (created in labs 1.1):

2. Click **My flows**.

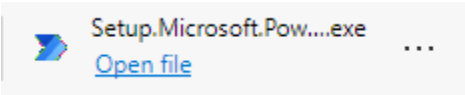


3. Click **Install** and select **Power Automate Desktop**.

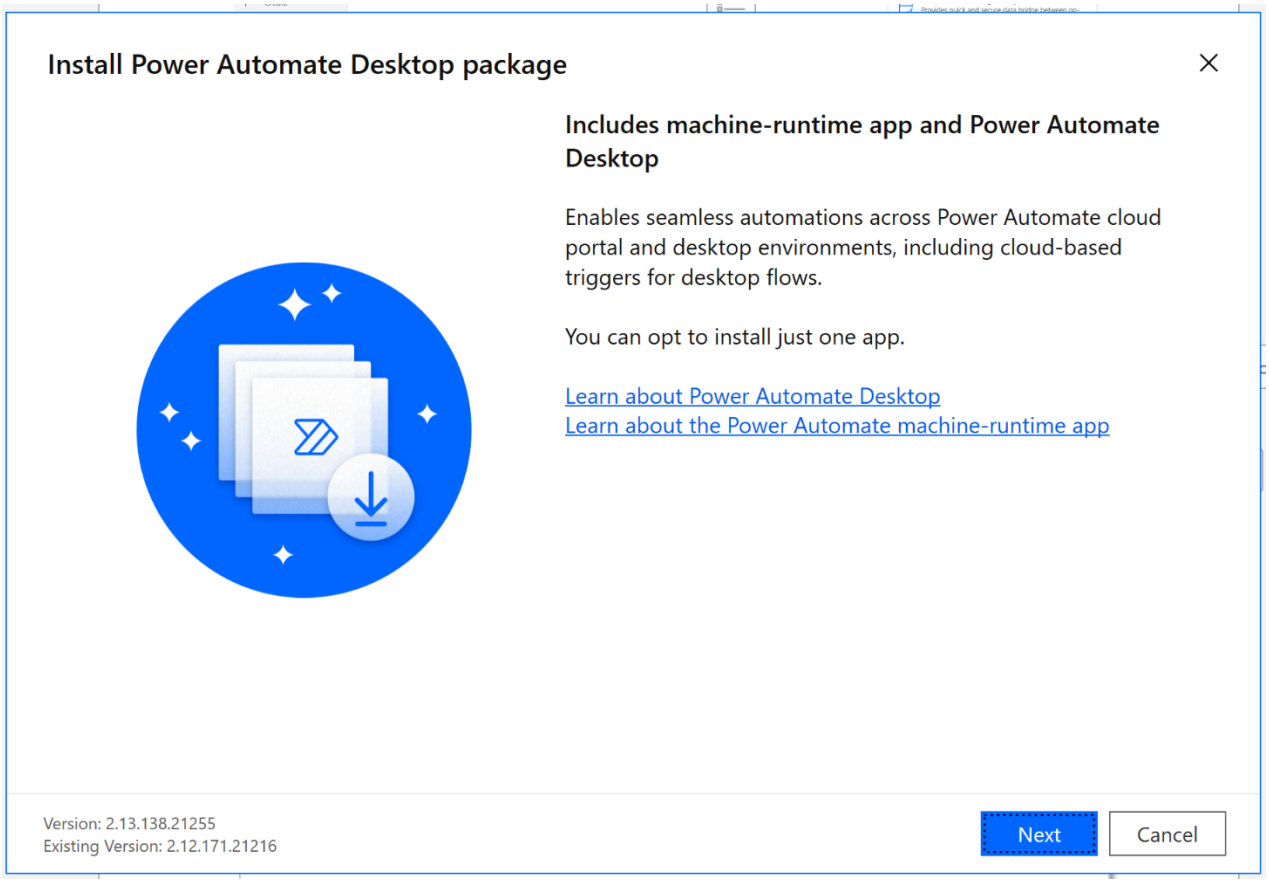


Note: Pay attention to the bar at the bottom of your browser where shows the downloading progress.

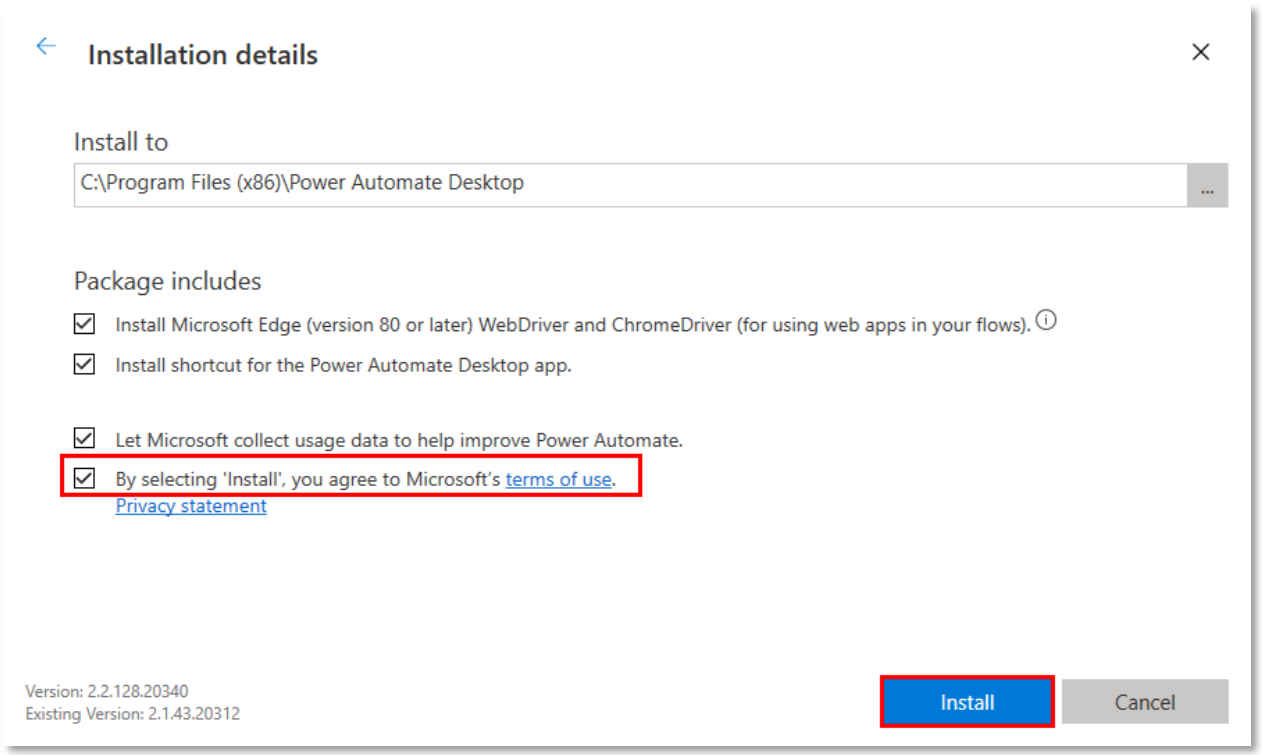
4. Once download completes, click on the file to open and run the installer: Setup.Microsoft.PowerAutomateDesktop.exe



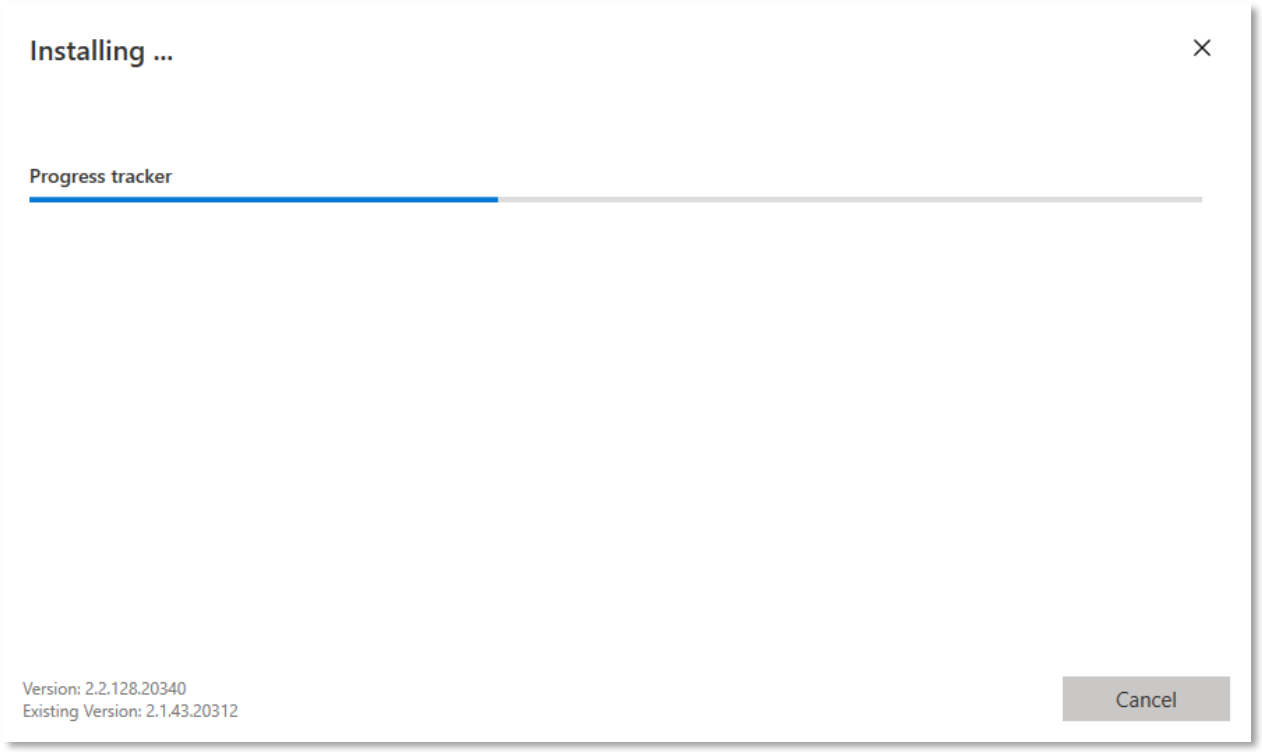
5. Select the following options as illustrated and click the **Next** button.



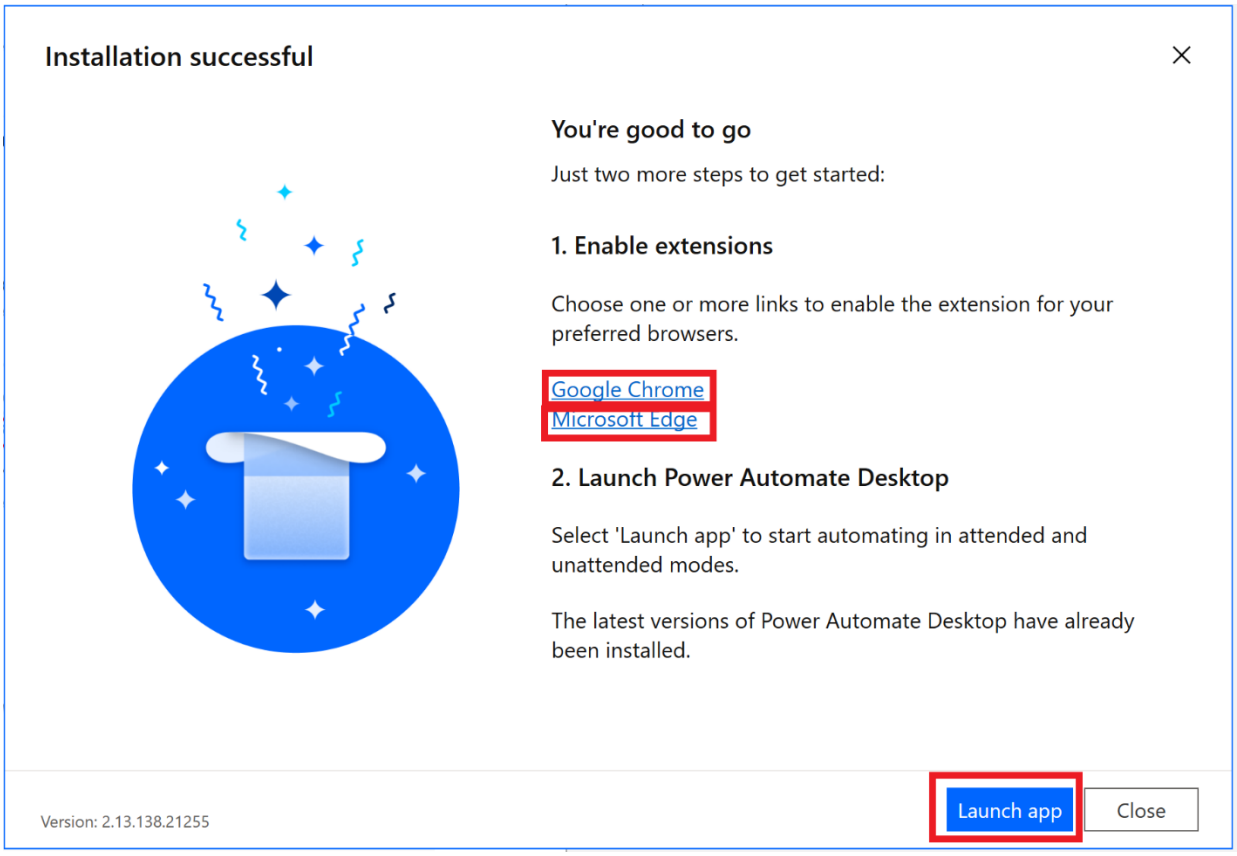
6. Select the checkbox to agree to Microsoft's terms of use then click **Install** button


Installation details
Install to
C:\Program Files (x86)\Power Automate Desktop
...
Package includes
Install Microsoft Edge (version 80 or later) WebDriver and ChromeDriver (for using web apps in your flows).
Install shortcut for the Power Automate Desktop app.
Let Microsoft collect usage data to help improve Power Automate.
By selecting 'Install', you agree to Microsoft's terms of use.
Privacy statement
Version: 2.2.128.20340
Existing Version: 2.1.43.20312
Install
Cancel

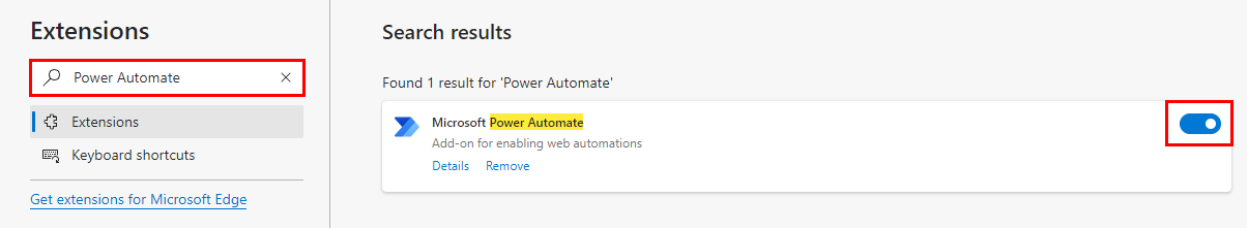
6. Installer will install on your computer:
    a. Power Automate Desktop app
    b. Power Automate Desktop browser extension for Edge Chromium and Google Chrome
    c. Power Automate machine runtime management app



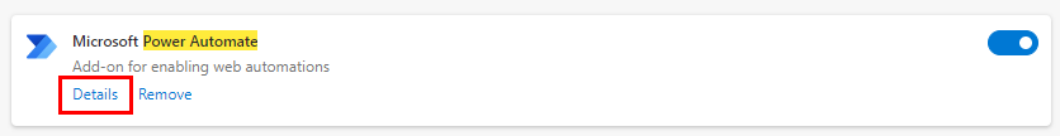
7. After installation is finished click the hyperlinks in step (1) to navigate to a chosen browser(s) to enable **Power Automate Desktop extensions.** After your extensions have been configured, you can **launch Power Automate Desktop** in step (2).



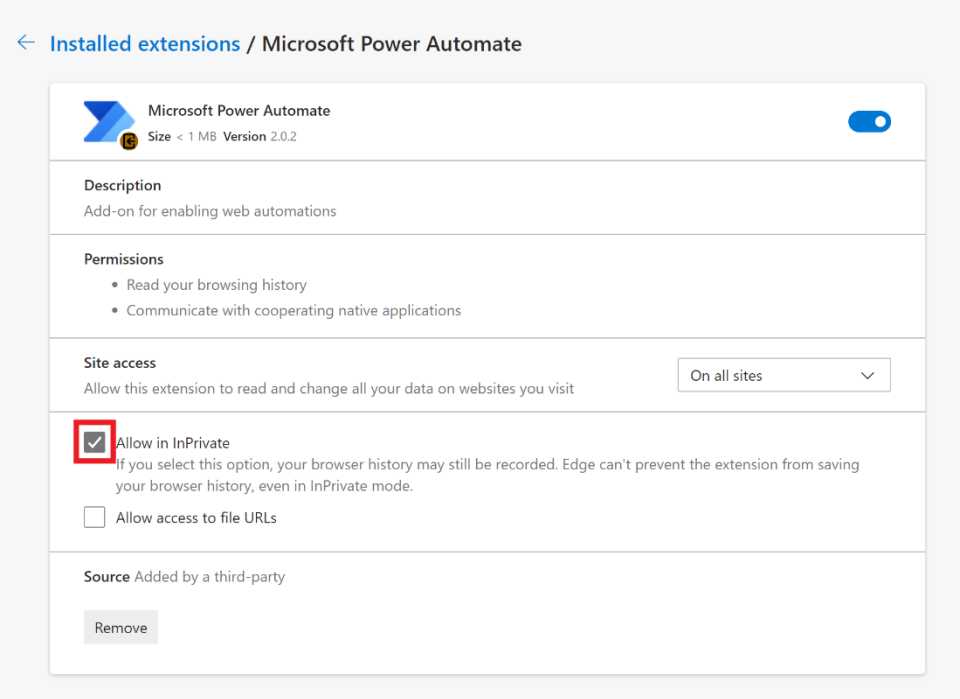
8. If you don't see this prompt, you can still manually enable the extension. Depending on what browser you are using, please follow the steps below to confirm the extension is enabled:
    a. **Enable in Microsoft Edge (Chromium)**
        i. Open edge://extensions URL in the Edge (Chromium) browser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


Extensions
Power Automate
Extensions
Keyboard shortcuts
Get extensions for Microsoft Edge
Search results
Found 1 result for 'Power Automate'
Microsoft Power Automate
Add-on for enabling web automations
Details
Remove

iv. Click **Details**.

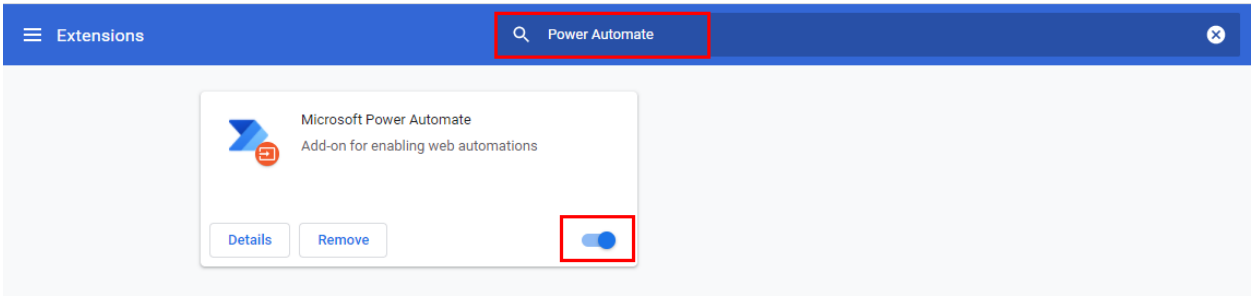


v. Check **Allow in InPrivate** checkbox

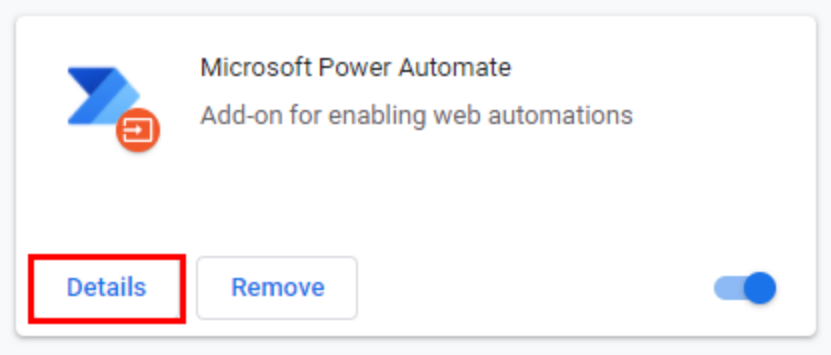


b. Enable in Google Chrome

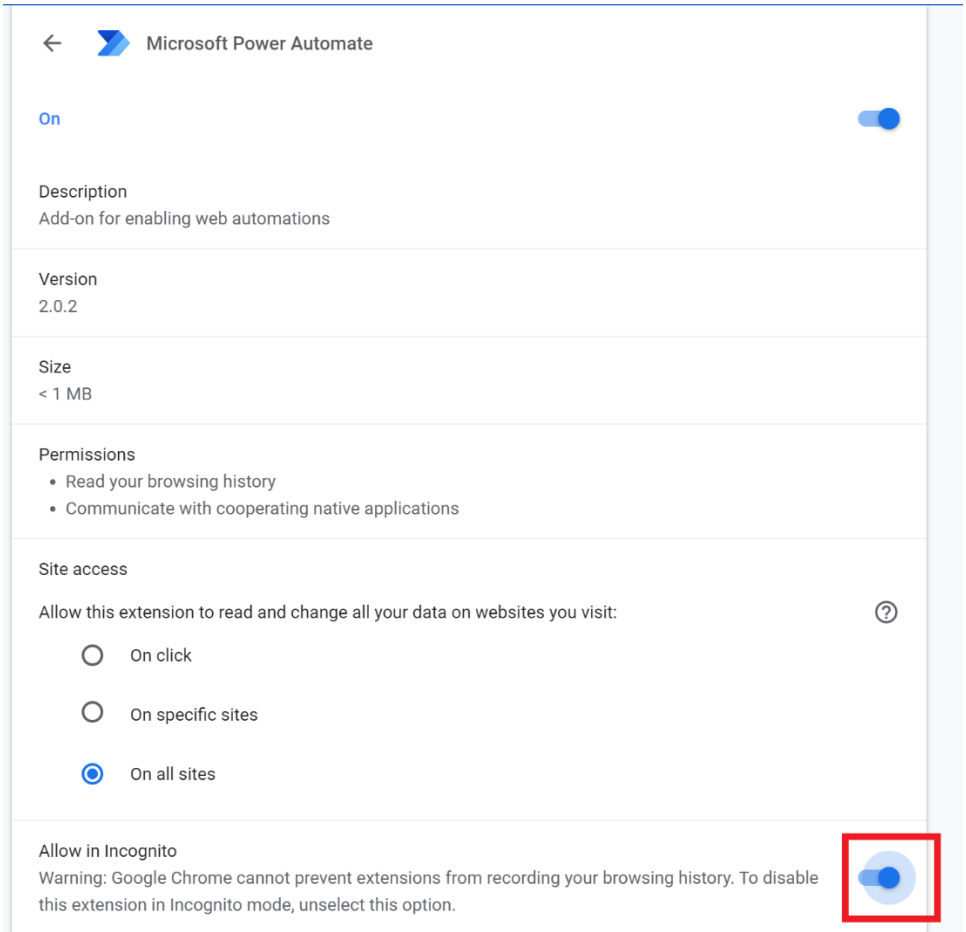
i. Open chrome://extensions URL in the Chrome browser.
ii. Find "Microsoft Power Automate" extension.
iii. Toggle button to enable extension.



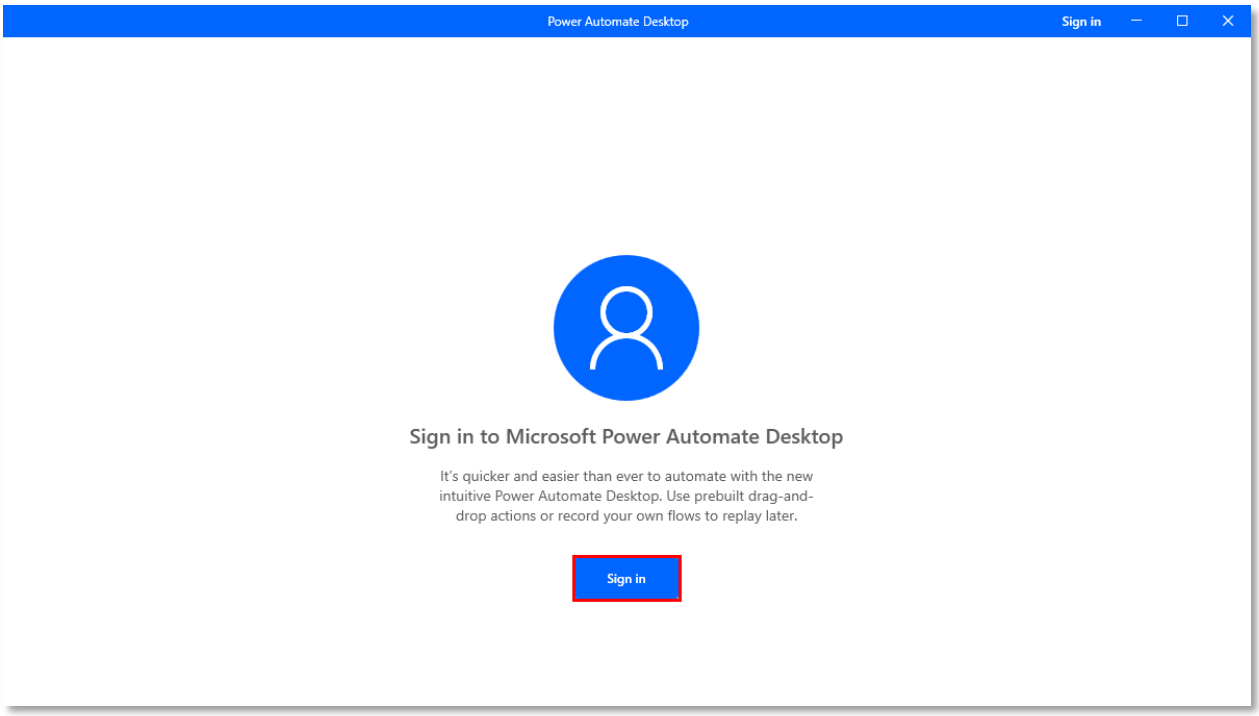
iv. Click Details.



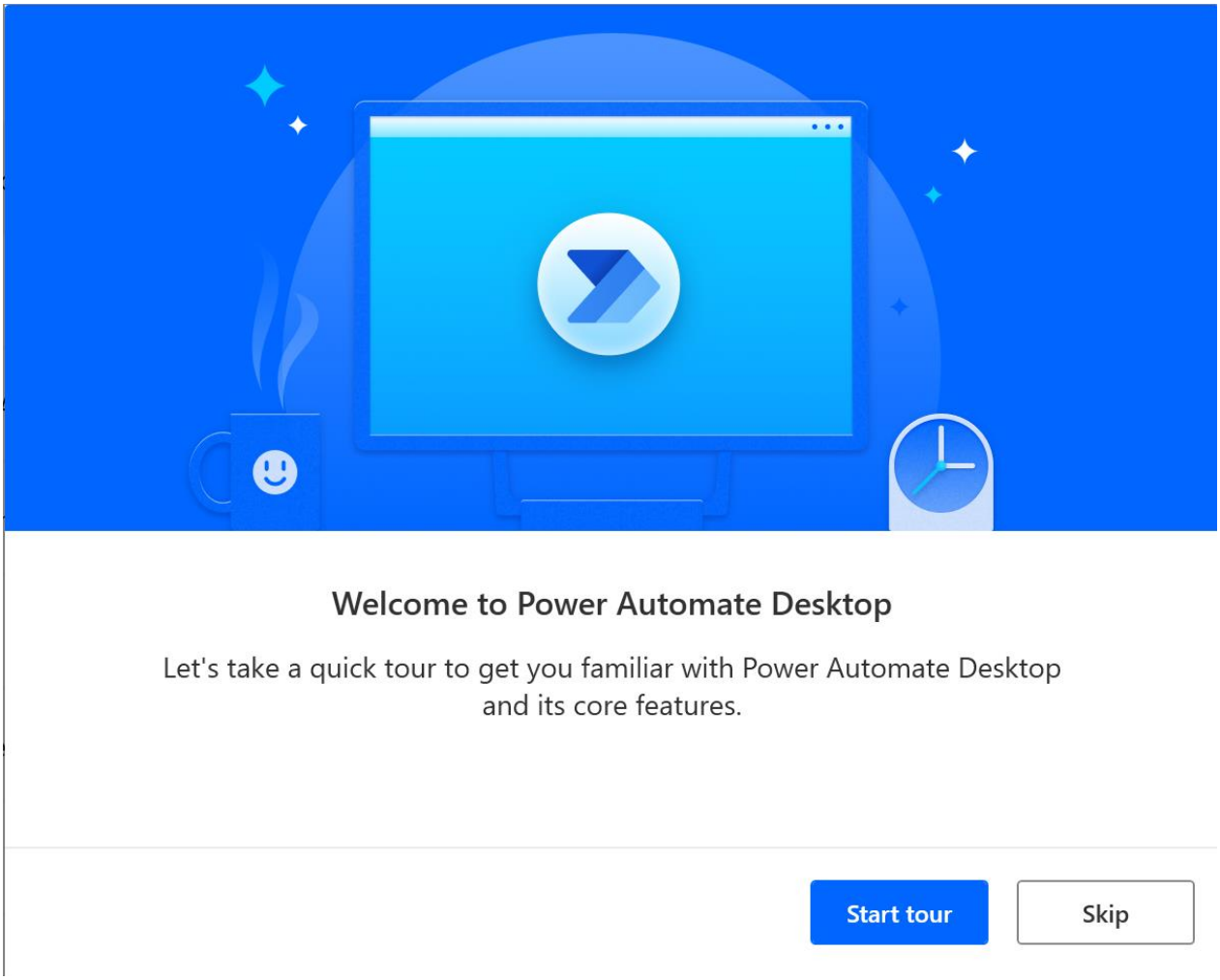
v. Toggle **Allow in Incognito** button to be on



9. Next Launch Power Automate Desktop. In the opened window, click "Sign in" and use the admin account that you created in Lab 1.1 step 10:



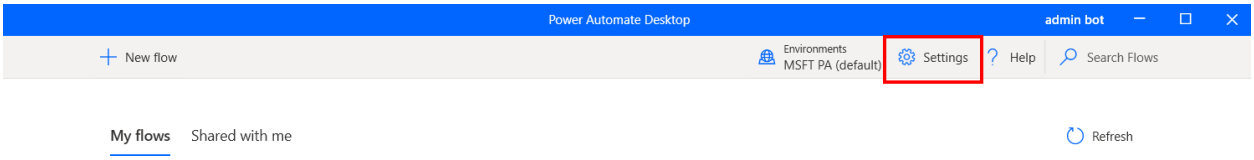
10. If you are log in for the first time, you might see the tour window. You can either start a tour or skip


Welcome to Power Automate Desktop
Let's take a quick tour to get you familiar with Power Automate Desktop and its core features.
Start tour
Skip

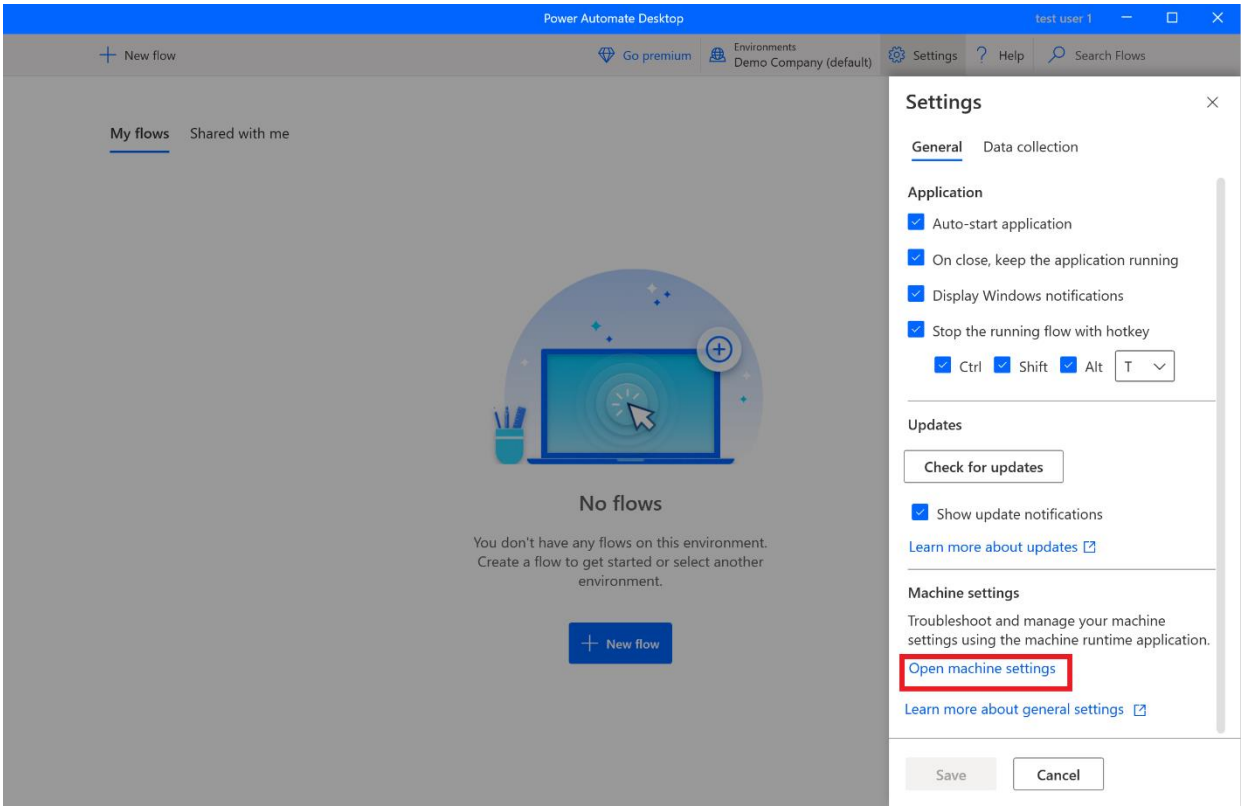
Register machine

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

11. Click **Settings** from **Power Automate Desktop app**

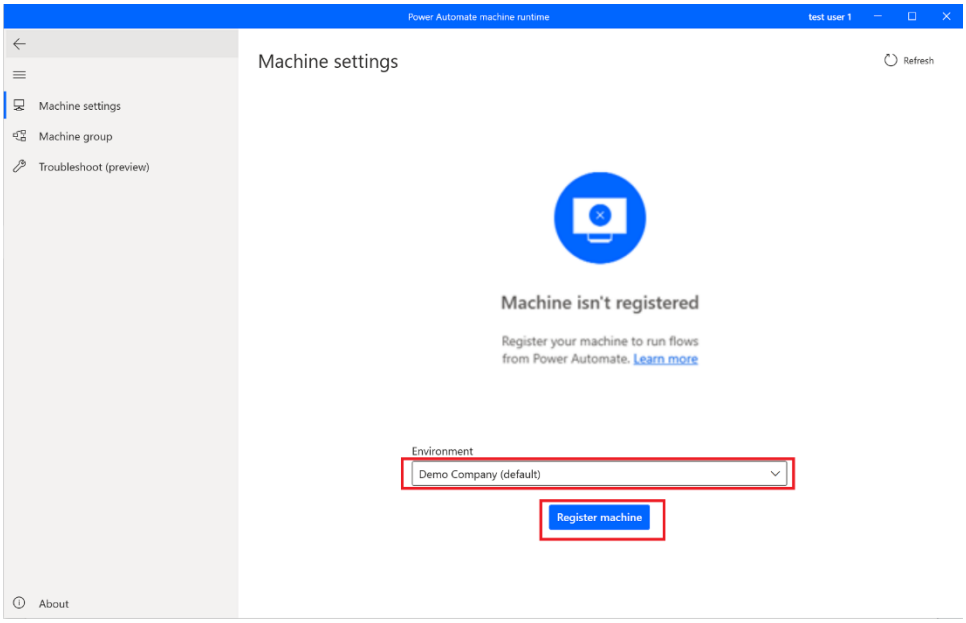


12. Click **Open machine settings** link under **Machine settings**

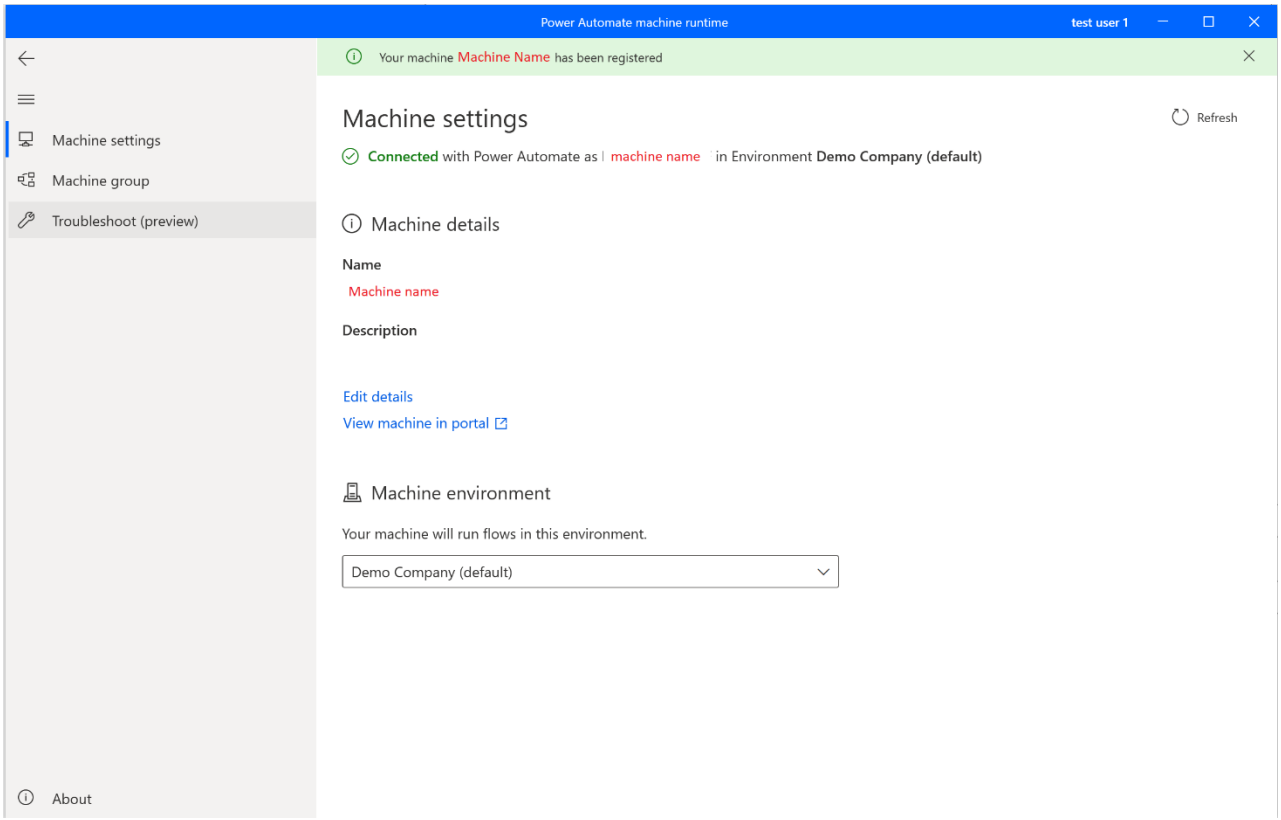


13. This will open the **Power Automate machine runtime** app

Note: If the machine is auto-registered for you, you will see the sceens in step #15. You can skip step #14.



14. You can click the **Register machine** button to register this machine to the default environment. If in the future, you have multiple environments and want to register this machine to a different environment than default environment, you can use the **Environment** dropdown menu to select an **environment then register.** Power Automate will only allow the cloud flows in this environment to trigger any desktop flows to run on this machine.
15. After registering successfully, you will see this information in the machine runtime app


Power Automate machine runtime
test user 1
Your machine Machine Name has been registered
Machine settings
Machine group
Troubleshoot (preview)
About
Machine settings
Refresh
Connected with Power Automate as machine name in Environment Demo Company (default)
Machine details
Name
Machine name
Description
Edit details
View machine in portal
Machine environment
Your machine will run flows in this environment.
Demo Company (default)

16. In the future you can also use the Machine group settings to add the machine to a machine group. You can find information about machine groups in Manage machine groups

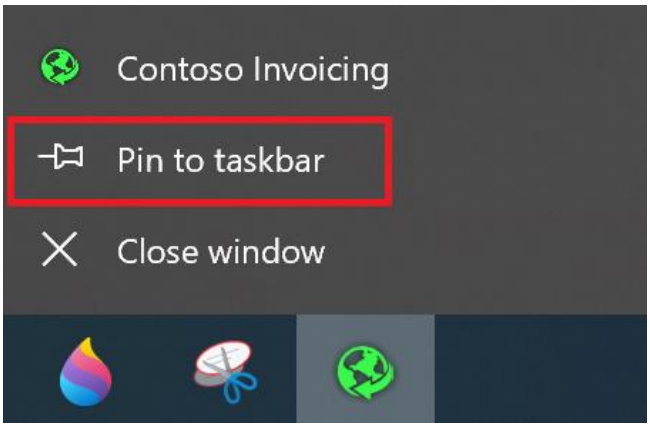
Note: Users will need either be an Environment Maker or desktop Flow Machine Owner role to register machines. Before registering a machine, make sure that you have the required permissions, and there is an available environment to register the new machine to.

Install Contoso Invoice App (for labs to use)

1. Download and install both the **ContosoInvoicingSetup.exe and ContosoInvoicingSetup.msi** in the prerequisite #1.3 folder of **lab data packages**.

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

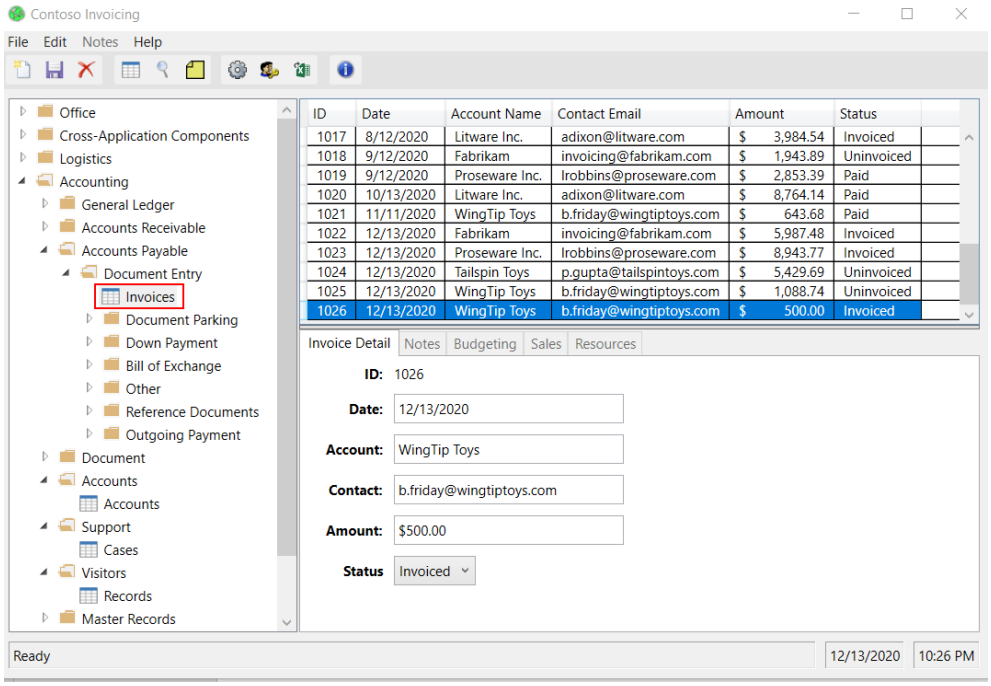
2. Launch the Contoso Invoicing app from the Start menu
3. Right click and pin the app icon to task bar for quick launch. We will use this app for both the Process advisor and Robotic Processing Automation recordings.



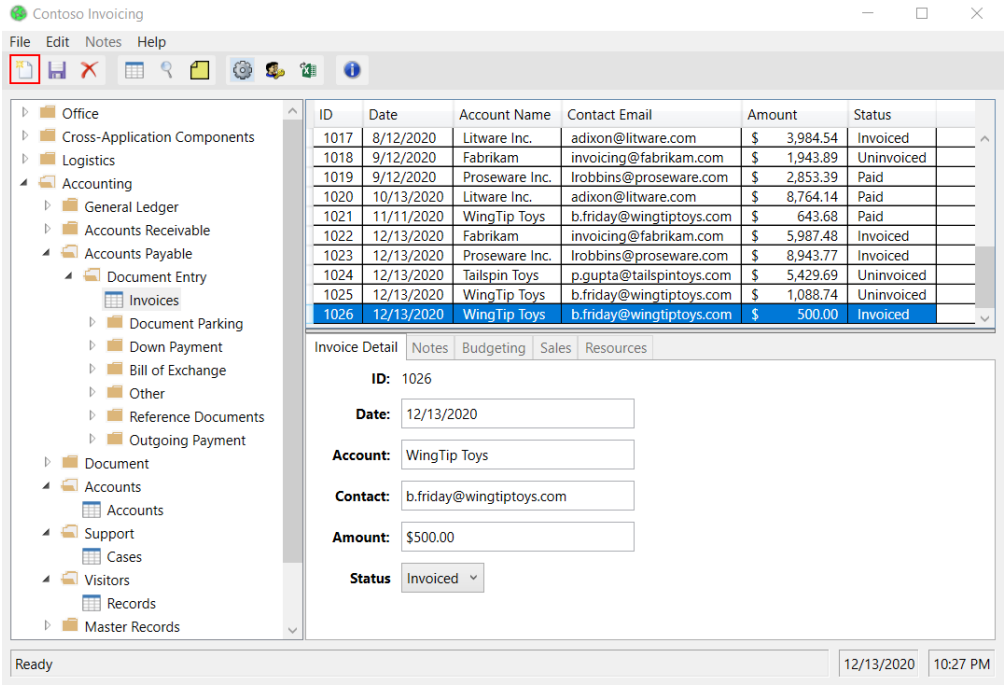
4. Now we can get familiar with Contoso Invoicing App so we can better prepare for the following lab recording exercises

   i) Open Contoso Invoicing App

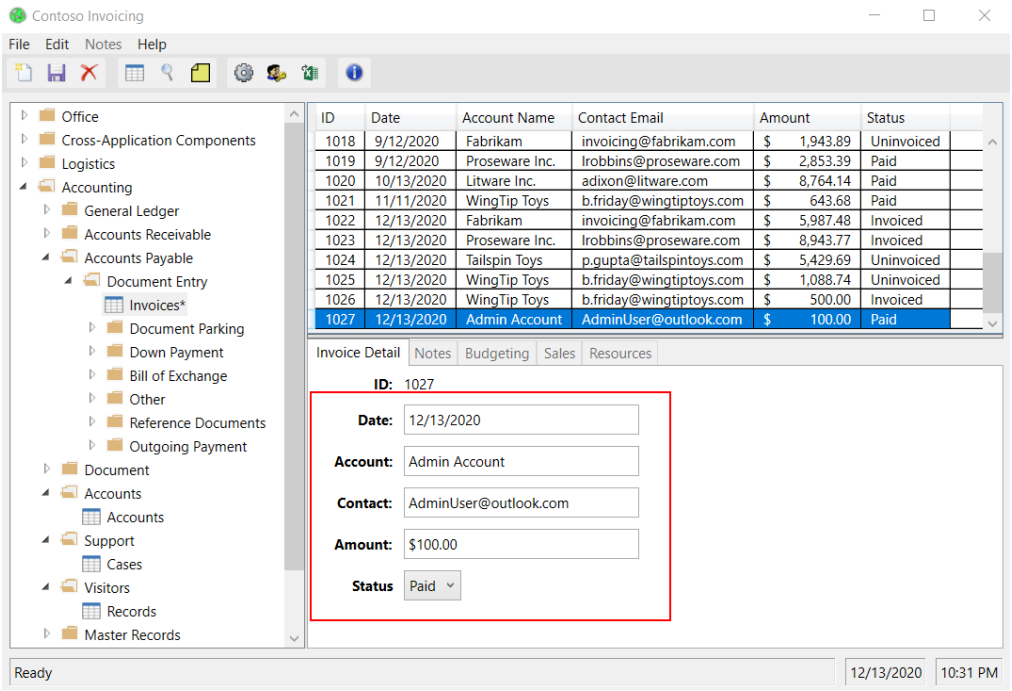
ii) Click **Invoices**



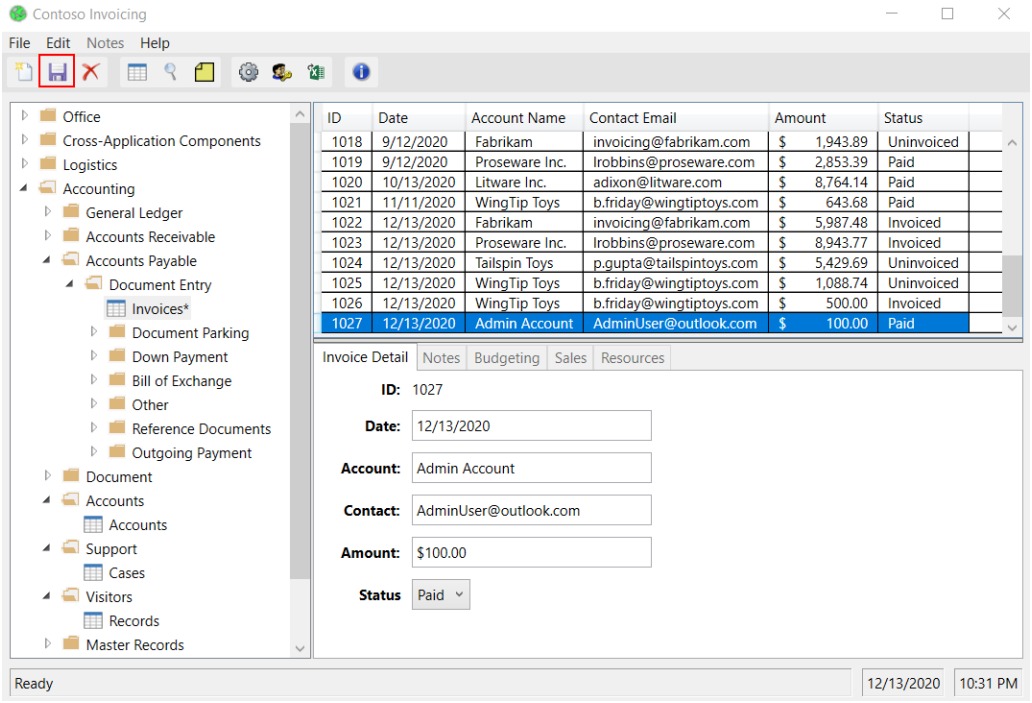
iii) Click **New record** button on the left to create a new invoice



iv) You can fill in any information for the new invoice in the text boxes



v) Click **Save** button on the left to save your new invoice



That completes the pre-requisites. You are now ready for the labs.

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