

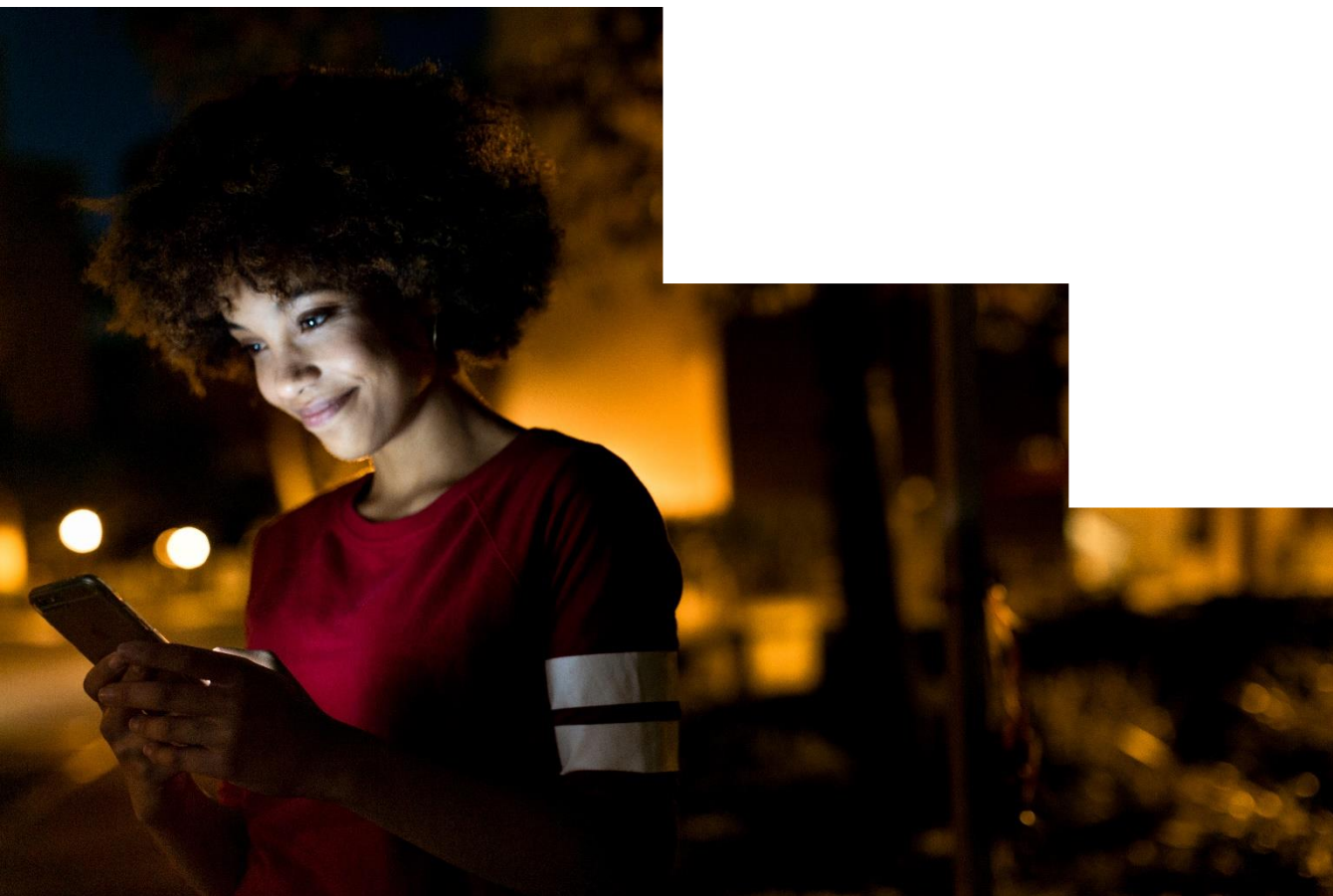


Robotic Process Automation in a Day

Lab prerequisites 1.1 – How to setup a tenant and create an environment

30 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

This beginner-level lab gives you hands-on experience designing and developing an end-to-end RPA automation using Power Automate. We'll show you the steps to build automate in less than a day.

Here's what you'll learn:

Power Automate Desktop flows

Create desktop flows that can record and playback manual steps against Win 32 desktop application or website. Learn how to run UI automation in attended or unattended mode.

Integration of Desktop flows with API connectors

Create a cloud flow that automates an end-to-end business process by connecting the desktop flow and other API cloud services such as Outlook and Microsoft Teams together.

Be sure to take each prerequisite step in this document before you start any of the labs.

Pre-requisite task 1: Setup Tenant

As prerequisites for RPA in a Day workshop, you need to have a valid tenant (Azure Active directory) account setup.

Important: If you have been provided with an existing tenant account through Office 365 or Power Automate licensing (prod or trial), you can skip this lab and start from lab #1.2

Important: In the next labs you will be using two accounts:

1. **Work account** to log in to Office 365 tenant (to log in to Office 365 services)
2. **Windows account** (to log in to your computer and to set up a connection)

If you don't have an existing tenant account to use, these steps will help you to setup one.

Prerequisites: To set up a tenant, you need existing personal email account (refer to as Microsoft Account (MSA) below) and a cellphone that can receive text message for sign up verification.

If you don't have MSA, you can create one on www.live.com. Once you create your MSA, follow the steps below.

1. Open a browser and navigate to <https://products.office.com/en-us/business/office-365-enterprise-e3-business-software>
2. Select **Free trial** to navigate to trial sign up page.

Office 365 E3

Office 365 E3 is a cloud-based suite of productivity apps and services with information protection and compliance capabilities included.

- Install Office for mobile on up to five PCs or Macs, five tablets, and five phones per user.
- Protect information with message encryption, rights management, and data loss prevention for email and files.
- Safeguard corporate data by allowing more secure access to company resources and enabling safe sharing of sensitive information inside and outside your organization.
- Facilitate legal compliance and email archiving with eDiscovery and mailbox hold.

\$20.00 user/month
annual commitment

Buy now

Free trial >

Or

Compare enterprise plans

[Full comparison \(PDF\) >](#)

3. Enter your MSA e-mail address and click **Next**.



You've selected Office 365 E3

1 Let's get you started

Enter your work or school email address, we'll check if you need to create a new account for Office 365 E3.

Email

This is required

Next

2 Tell us about yourself

3 How you'll sign in

4 Confirmation details

4. Click **Set up account**.



You've selected Office 365 E3

- 1 Let's get you started
Looks like you need to create a new account. Let's get you started!
Continue as [shane@contoso.com](#). [Not you?](#)
[Set up account](#)
- 2 Tell us about yourself
- 3 How you'll sign in
- 4 Confirmation details

5. Fill in your information and click **Next**.

You've selected Office 365 E3

① Let's get you started

② Tell us about yourself



First name	Middle name (Optional)	Last name
<input type="text" value="Virtual"/>	<input type="text"/>	<input type="text" value="Agent"/>
Business phone number		
<input type="text" value="2066666666"/>		
Company name	Company size	
<input type="text" value="Demo Company"/>	<input type="text" value="10-24 people"/>	
Country or Region		
<input type="text" value="United States"/>		
<input type="button" value="Next"/>		

③ How you'll sign in

④ Confirmation details

6. You'll be asked to verify you identify using either phone call or text message. Follow directions and confirm your identity by specifying phone number.

1 Let's get you started

2 Tell us about yourself



A text or phone call helps us make sure this is you.
Enter a number that isn't VoIP or toll free.

☒ Text me ☐ Call me

Country code

(+1) United States

Phone number

2066666666

We don't save this phone number or use it for any other purpose.

Send verification code

Back

3 How you'll sign in

4 Confirmation details

7. On the **Create your business identity** section supply a unique domain name

Note: you should choose your own unique tenant domain (we use yourdemocompany just as an example)

8. Click **Check availability**.



Thank you for choosing Office 365 E3

- ① Signup started
- ② Nice to meet you, Virtual
- ③ Create your business identity



To set up your account, you'll need a domain name. [What is a domain?](#)

You'll probably want a custom domain name for your business at some point. For now, choose a name for your domain using onmicrosoft.com

yourcompany
yourdemocompany .onmicrosoft.com

Check availability

Next

- ④ Get Office

9. Click **Next** if the custom domain name is available.



Thank you for choosing Office 365 E3

- ① Signup started
- ② Nice to meet you, Virtual
- ③ Create your business identity



To set up your account, you'll need a domain name. [What is a domain?](#)

You'll probably want a custom domain name for your business at some point. For now, choose a name for your domain using onmicrosoft.com

yourcompany
yourdemocompany .onmicrosoft.com

yourdemocompany.onmicrosoft.com is available.

Check availability

Next

- ④ Get Office

10. Now, let's create an admin user ID and password for your tenant domain (refer to as Test Account below). You can choose any **Name**. Once you fill out your username and password, click **Sign Up**.

3 How you'll sign in



Now create your username and password to sign in to your account.

Username

admin

@ [redacted] ompany.onmicrosoft.com

Password

.....

Confirm password

.....

By selecting **Sign up**, you agree to our [trial agreement](#).

I understand that Microsoft may contact me about my trial.

I will receive information, tips, and offers about solutions for businesses and organizations, and other Microsoft products and services. [Privacy Statement](#).

☒ I would like Microsoft to share my information with select partners so I can receive relevant information about their products and services. [Privacy Statement](#).

Sign up

Back

11. Wait while tenant is created. It usually takes less than 1 min. Then click **Sign in**.

You've selected Office 365 E3

- 1 Let's get you started
- 2 Tell us about yourself
- 3 How you'll sign in

Your account is successfully created.

Please sign in to continue.

Sign In
- 4 Confirmation details

12. Click **Get started**. This will navigate you to **Office admin portal**. When you land on the admin center page, you need to **EXIT SETUP**.

You've selected Office 365 E3

- 1 Let's get you started
- 2 Tell us about yourself
- 3 How you'll sign in
- 4 Confirmation details



Thanks for signing up for Office 365 E3

Your username is **admin@your democompany.onmicrosoft.com**

We've sent a confirmation email to **admin@your democompany.onmicrosoft.com**

Get Started

Manage your subscription

Microsoft 365 admin center

Search

Advanced setup

Install Office

Add domain

Add users

Connect domain

Share Microsoft Teams

Install Office

You can download and install Office for your device now. Selecting an option below will assign a Office 365 E3 license to you, if you don't have one already. If you want to install a different language, the 64-bit version, or other apps available with your subscription view [other install options](#).

Office apps

Word, Excel, PowerPoint, OneNote, Outlook

↓

Continue

Exit setup

13. Select **Other** as the reason for leaving setup and then click **Send and exit**.

Let us know why you're leaving setup?

×

Help us improve your experience!

Other

▼

Additional comments

Any other details?

☐ It's okay for Microsoft to contact me.

Send and exit

Pre-requisite task 2: Create a trial environment with database

Now, you'll create a trial environment to explore Microsoft Power Automate.

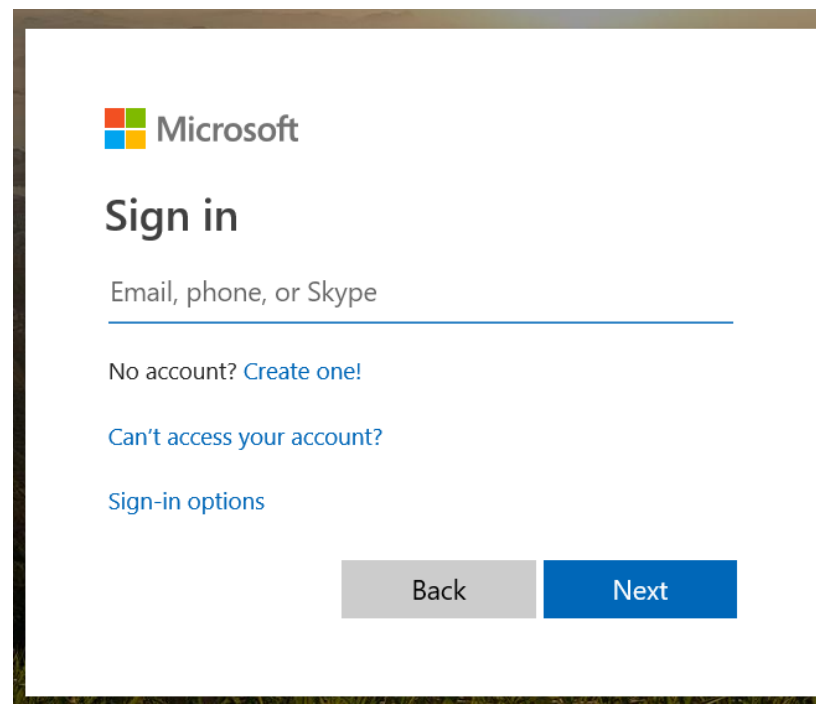
Warning: When your trial expires in 29 days, your data and any customizations will be deleted.

You may want to save your work to use in another environment. To do that, export your work as a solution after you complete all the exercises in the Robotic Process Automation in a Day training.

STEP A: Sign in

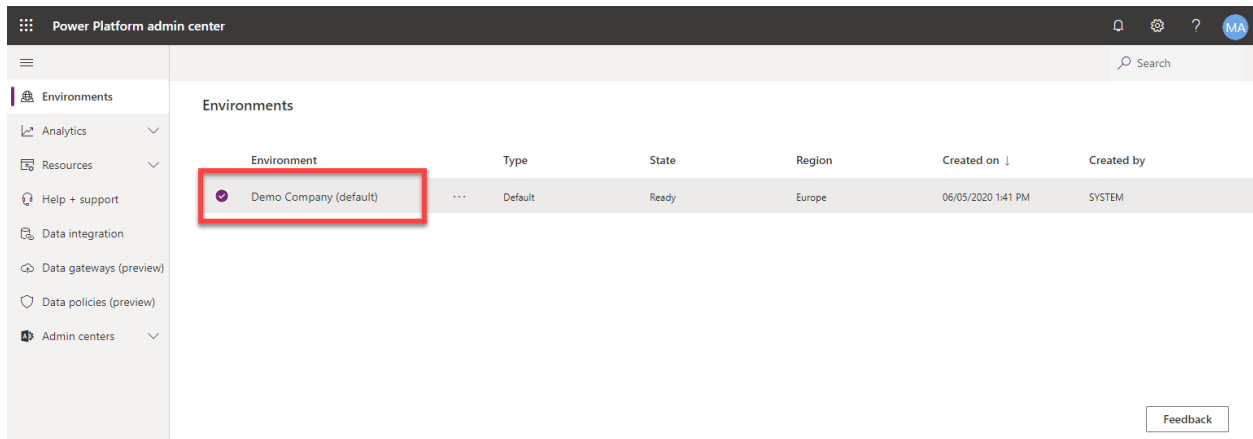
Copy and paste this link: <https://admin.powerplatform.microsoft.com/environments>

On the **Environments** page, sign in with the test account's e-mail you created for this tenant domain.



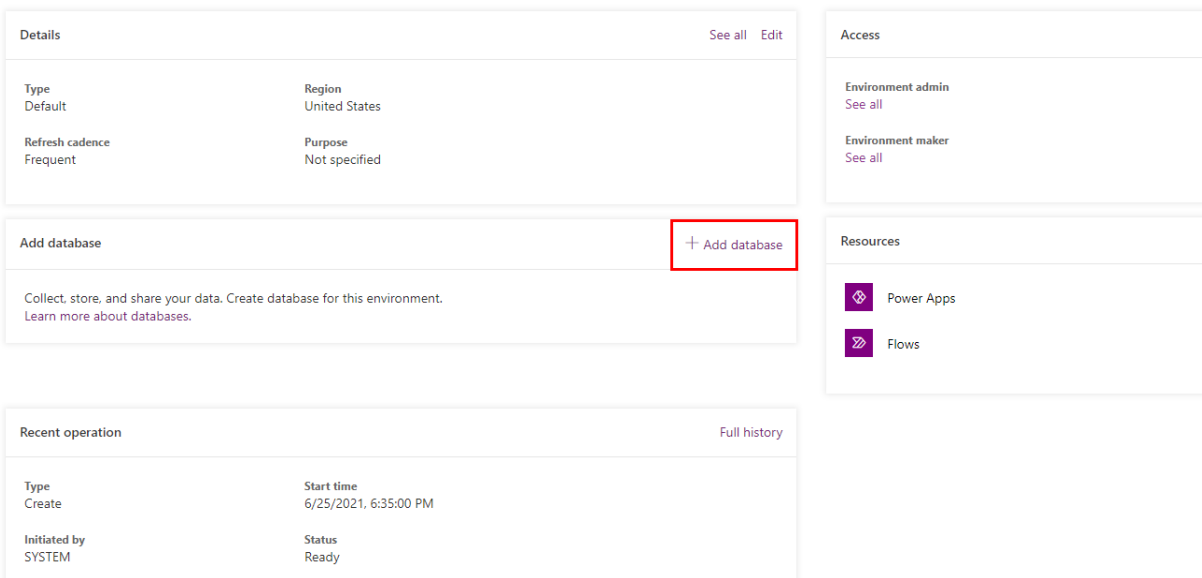
STEP B: Configure your default environment to add a database

1. Select **Environments** in the tab bar (Note: you may need to expand the Left Navigation bar options to see it). Then select your automatically created environment that has “(default)” in the name.



2. Select **Add database**.

Environments > Demo Company (default)



Note: If your environment already has a database created, you will not see this option on the page.

3. Specify values in the **Create a database for this environment** dialog box. Use these values:
 - **Language:** English
 - **Currency:** USD

Then click **Add**.

Add database



Language *

Default language for user interfaces in this environment

Currency *

Reports will use this currency

Enable Dynamics 365 apps

In addition to Power Apps, [Learn more](#)

☐ No

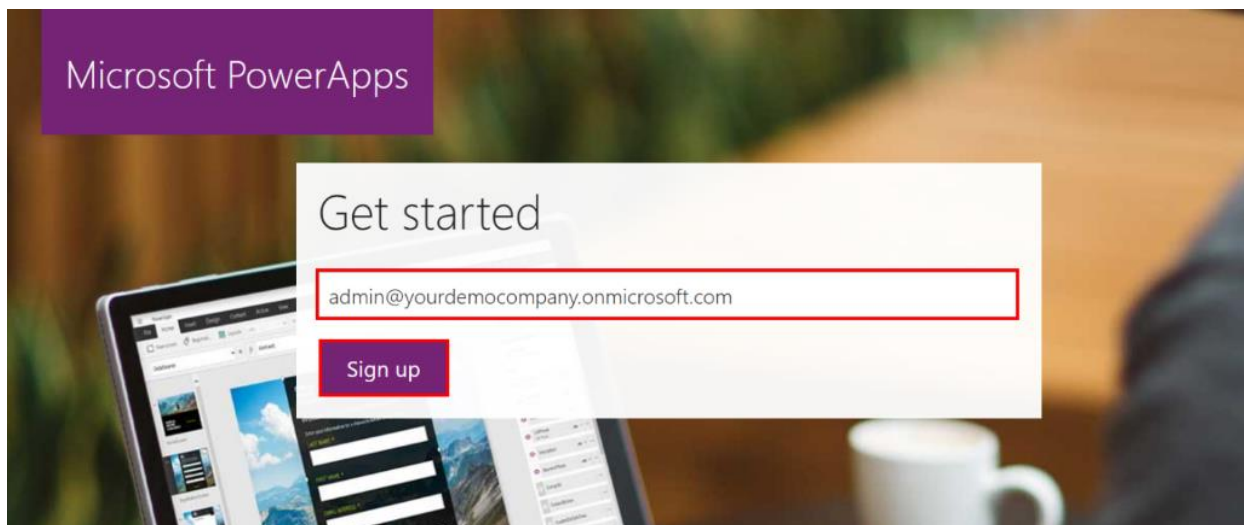
Security group

Restrict environment access to people in this security group. Otherwise, everyone can access. [Learn more](#)

Add

Cancel

Note: You may be asked to sign in again.



If you see the prompt of this picture below or other Power Apps signup page, just click "Trail" in the red banner, follow the instruction to sign in one more time, then repeat step above starting from Step A – copy and paste <https://admin.powerplatform.microsoft.com> to the browser address bar and repeat **Create my database**.

Sign-up for the Trial and try creating the database again. [Learn more](#)

Create a database for this environment (?)

Choose the currency and language your data should use.

Currency (?)

USD

Language (?)

English

By choosing **Create my database**, you agree Microsoft can use entity and field names that you create (but not content in the database tables) to help improve our common data model. These names may be stored in our diagnostic systems and copied across regions. [Learn more](#)

Cancel Create my database

4. After you clicked the **Create my database**, you can see the database provisioning progress.

Environment	Type	State	Region	Created on ↓	Created by
Demo Company (default)	Default	PreparingInstance	United States	07/12/2021 7:19 AM	SYSTEM

Note: creating a database may take up to a few minutes. Please wait or refresh until you see the "New environment is getting prepared" message disappeared.

Power Platform admin center

Environments

Analytics

Resources

Help + support

Data integration

Data (preview)

Data policies

Admin centers

+ New

Refresh

The list below contains environments that are active, inactive, and preparing. [Click to view environments you may recover.](#)

Environments

Environment	Type	State	Region	Created on ↓	Created by
Demo Company (default)	Default	Ready	United States	09/20/2021 2:20 AM	SYSTEM

Your environment will be ready after the database is provisioned.

Robotic Process Automation in a Day, Lab 1: Pre-requisites

19

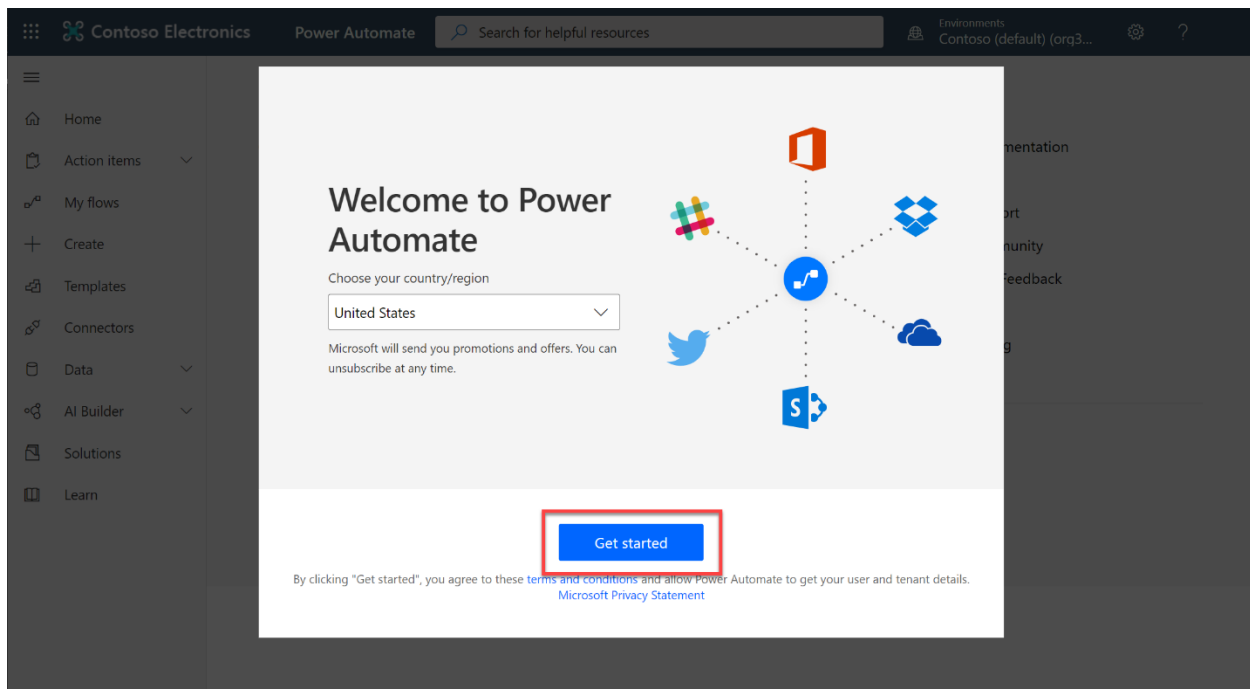
Pre-requisite task 3: Start a trial of Power Automate per user plan with attended RPA

Now, you'll learn how to start trial per user plan with attended RPA, that is required to run built Desktop flows with Power Automate.

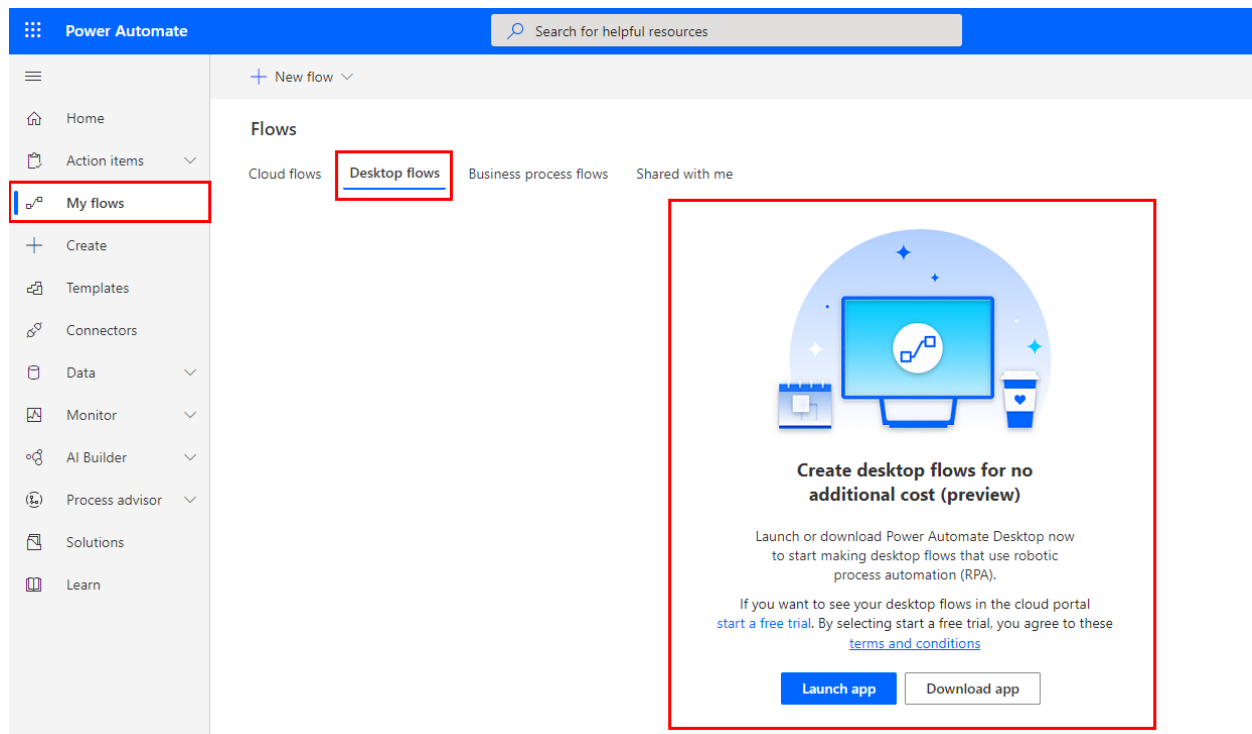
Open browser and go to Power Automate portal at <https://powerautomate.microsoft.com>

If you have not signed in, sign in using the test account's e-mail you created for this tenant domain.

Note: If you signed in for the first time, you will see the dialog window as presented below. Click **Get started**:

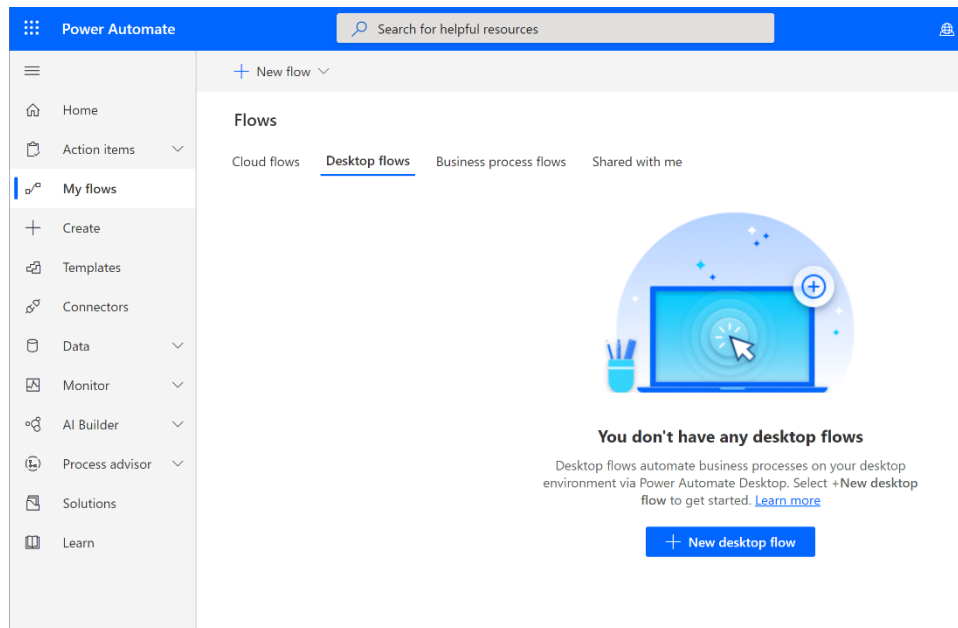


Next navigate to the **"My flows"** page then click the **"Desktop flows"** tab. Once you open it, you will see below image appears, giving you the option to start a free trial. Click the **start a free trial** text link in the paragraph.



Important! After you clicked the link, you may not see any difference. Please wait for 15 minutes until the change is processed and the trial license starts to work on your account and refresh this page again.

After the trial is activated, you should see the following picture on the page



Once that's done, you're ready to go to lab #1.2.

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.