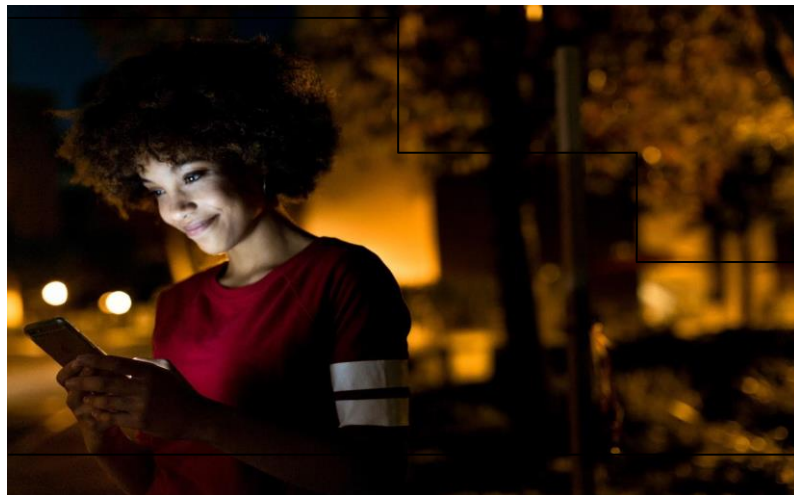


Empowering RPA enthusiasts: Harnessing the Potential of Power Automate (MPPC23)

**Lab 5 –Cloud Integration (Outlook Trigger)-
machine connection and Attended run**

30 mins - October 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 **Outlook Triggered cloud flow**
- Configure **machine connection** to enable the cloud flow to execute the desktop flow on your computer.
- Add the "Enter an invoice" 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

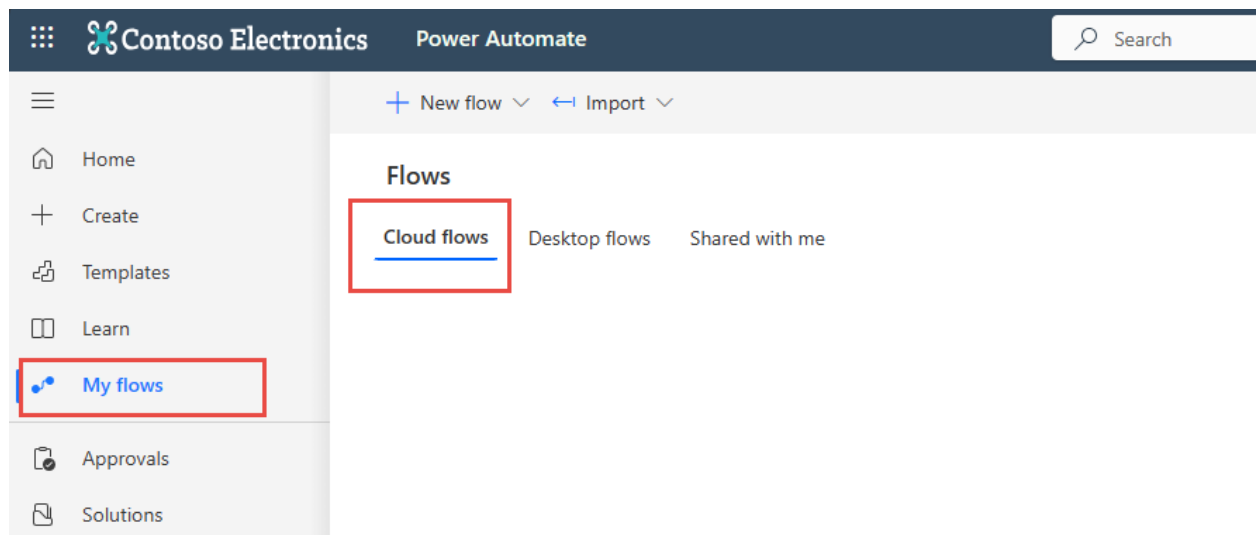
Note: this is covered in pre-requisite #1. Your machine should have already been registered on the currently selected environment in the application.

If not already registered, please refer to the lab 01 document that includes details about registering your machine.

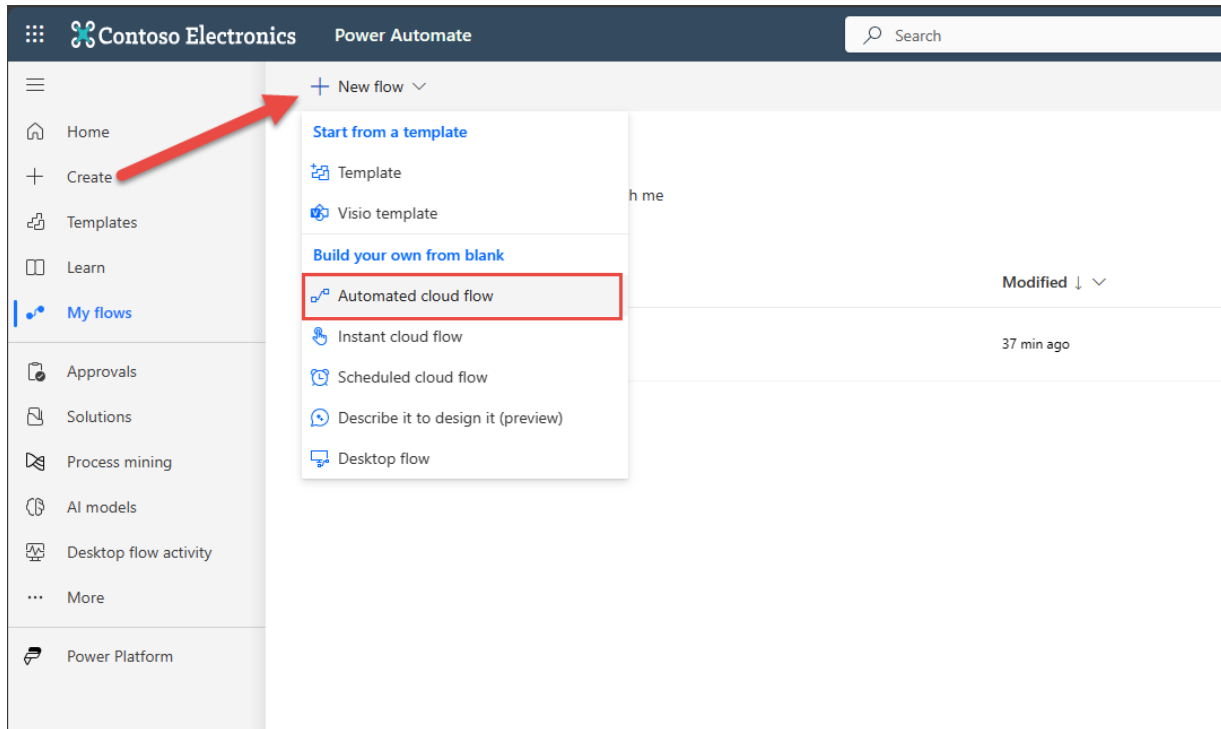
Create your first cloud flow and a connection to trigger a desktop flow to run on your machine

Note: To use this functionality, you must own a paid or a trial of [Premium License](#). (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.

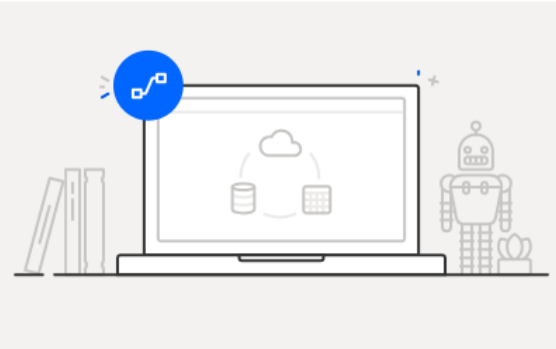


- From the top of the screen, select the **New flow** drop-down, then select **Automated cloud flow** from the menu.



- Name the flow **Outlook trigger desktop flow to enter invoice**, then choose **When an email arrives (V3)** as a flow trigger. Then, select **Create**.

Build an automated cloud flow



Free yourself from repetitive work just by connecting the apps you already use—automate alerts, reports, and other tasks.

Examples:

- Automatically collect and store data in business solutions
- Generate reports via custom queries on your SQL database

Flow name

Outlook trigger desktop flow to enter invoice

Choose your flow's trigger * ⓘ

Search or select a trigger from the list below to create a flow. (Required)

when an email arrives

- When a new email arrives (V2) Outlook.com ⓘ
- When a new email arrives (V3) Office 365 Outlook ⓘ
- When a new email mentioning me ar... Outlook.com ⓘ
- When a new email mentioning me ar... Office 365 Outlook ⓘ
- When a new email arrives in a share... Office 365 Outlook ⓘ

[Skip](#) [Create](#) [Cancel](#)

5. Select the **Show advanced options**.

Office

Search

Undo Redo

When a new email arrives (V3) ⓘ ...


Folder: Inbox

Show advanced options ▾

Add your next step
Add steps one at a time until you create the flow you want.

+ New step Save

6. Select **Yes** for **Include Attachments** and **Yes** for **Only with Attachments** (yours may read Has Attachments; depends on the version of the Outlook connector).
In the **Subject filter** enter **new invoice**

When a new email arrives (V3)?...

Folder	Inbox
To	Recipient email addresses separated by semicolons (If any match, t...
CC	CC recipient email addresses separated by semicolons (If any matc...
To or CC	To or CC recipient email addresses separated by semicolons (If any ...
From	Sender email addresses separated by semicolons (If any match, the...
Include Attachments	Yes
Subject Filter	new invoice
Importance	Any
Only with Attachments	Yes

[Hide advanced options](#) ^

7. Then Select +New Step

When a new email arrives (V3)

Folder: Inbox

To: Recipient email addresses separated by semicolons (If any match, the

CC: CC recipient email addresses separated by semicolons (If any match,

To or CC: To or CC recipient email addresses separated by semicolons (If any m

From: Sender email addresses separated by semicolons (If any match, the tr

Include Attachments: Yes

Subject Filter: new invoice

Importance: Any

Only with Attachments: Yes

Hide advanced options ^

+ New step Save

8. Search for **Desktop flow** in the search bar and select **Run a flow built with Power Automate for desktop (Premium)**.

Choose an operation

desktop flow

All Built-in Standard Premium Custom My clipboard

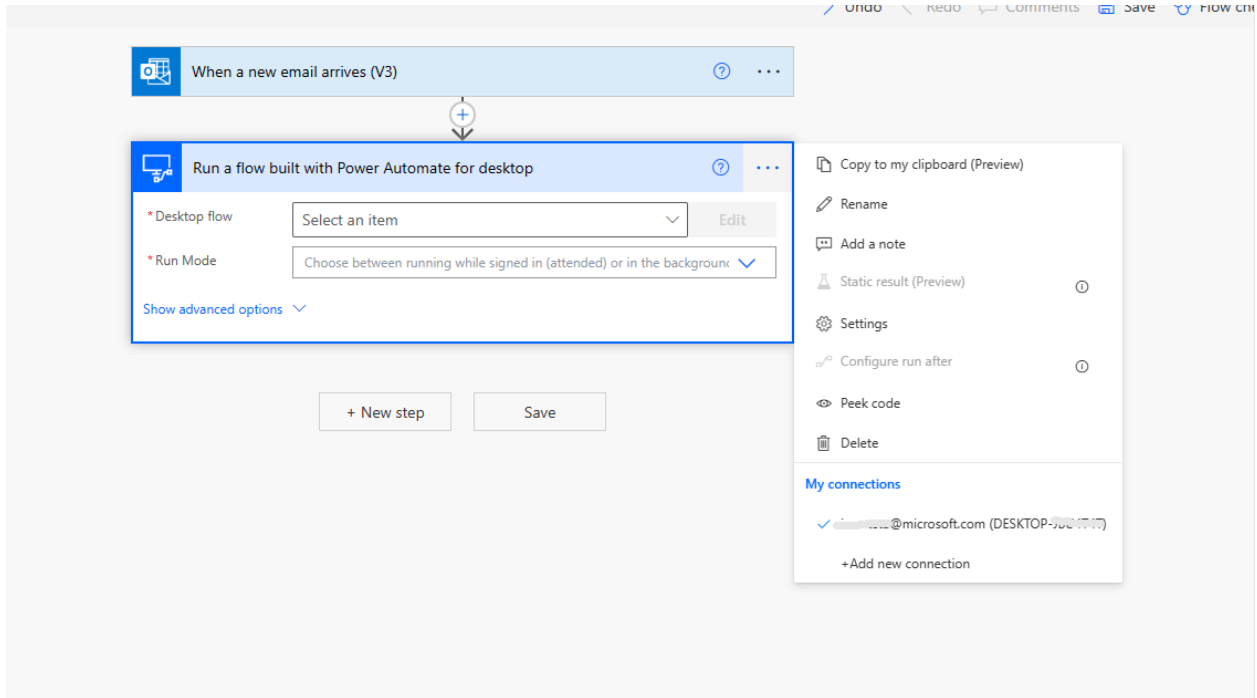
Desktop flows Microsoft Teams Flows Notifications PowerApps WorkPoint Envoy

Triggers Actions

Run a flow built with Power Automate for desktop PREMIUM Desktop flows

Run a flow built with Selenium IDE PREMIUM Desktop flows

9. 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.



10. 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.

A screenshot of the 'Desktop flows' connection creation dialog. The dialog has a title bar with a computer icon and the text 'Desktop flows'. It contains four required fields, each with a red asterisk and a help icon: 'Connect' (a dropdown menu with 'Connect with username and password' selected), 'Machine or machine group' (a dropdown menu with 'Select an item' selected), 'Domain and username' (a text input field with the placeholder 'Format as domain\username or username@domain.com'), and 'Password' (a text input field with the placeholder 'Password credential'). At the bottom are 'Create' and 'Cancel' buttons.

The **Connect** drop down menu offers 3 options like below:

Desktop flows

* Connect: Connect with username and password

①

* Machine or machine group: Connect with username and password, Connect with sign in - Attended (preview), Using an on-premises data gateway (deprecated)

①

* Domain and username: Format as domain\username or username@domain.com

①

* Password: Password credential

①

Create

1. **Connect with username and password:** Needs a username and a password to connect to the machine.
2. **Connect with sign in – Attended (preview):** This is the best option when doing attended as it doesn't require any password and only relies on the Web single sign-on (SSO) experience. We won't be using this option as it can only be used if the maker's tenant is the same as Windows machine's tenant.
3. **Using an on-premises data gateway (deprecated):** When using data gateway to connect your machine. This option is about to be removed and should not be used anymore.

Keep the default option for **Connect (Connect with username and password)**.

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

Desktop flows

* Connect: Connect with username and password

①

* Machine or machine group: Select an item

①

* Domain and username: Search

①

* Password: Password credential

①

Create

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

You need to use your own account used to open your Windows session, not the workshop account we provided to you.

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.

13. Then, select **Create**.

Desktop flows

Invalid connection.

* Connect Connect with username and password

* Machine or machine group LAPTOP-

* Domain and username domain\username

* Password

Create

14. 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 Edit

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

Show advanced options

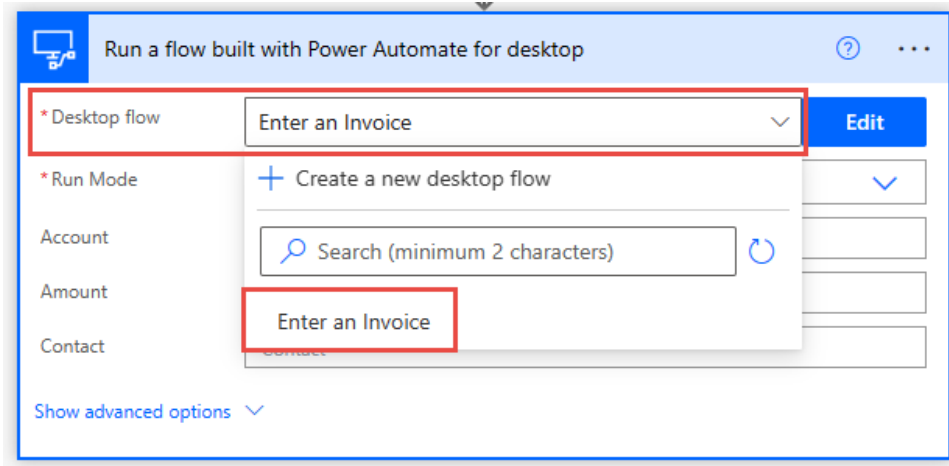
+ New step Save

My connections

- Invalid connection
- Invalid connection
- Invalid connection
- Invalid connection
- ✓

+Add new connection

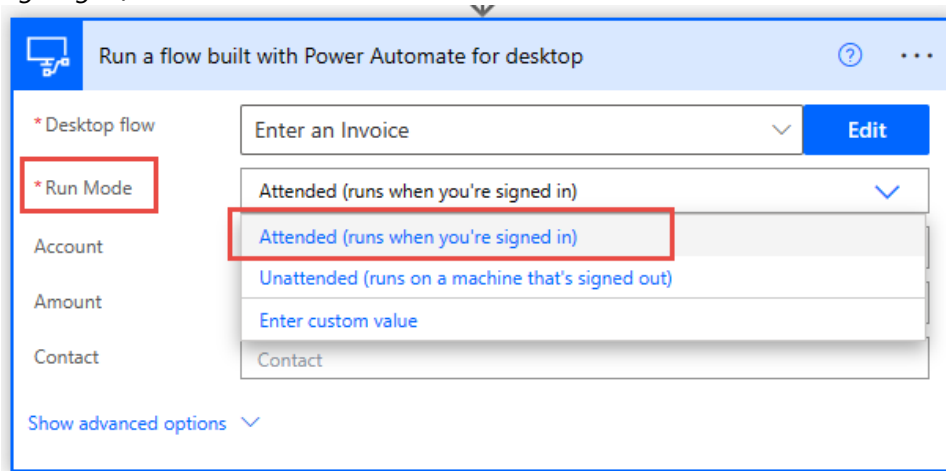
15. Under **Desktop flow**, select the **Enter an invoice** desktop flow that you have created in a previous labs.



16. Under **Run Mode**, 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)



Fill in the **Amount**, **Contact** and **Account** 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

Run a flow built with Power Automate for desktop

* Desktop flow: Enter an Invoice Edit

* Run Mode: Attended (runs when you're signed in) ▼

Account: WingTips Cups

Amount: \$200

Contact: b.friday@wingtipcups.com

Show advanced options ▼

17. 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) ▼

Account: WingTips Cups

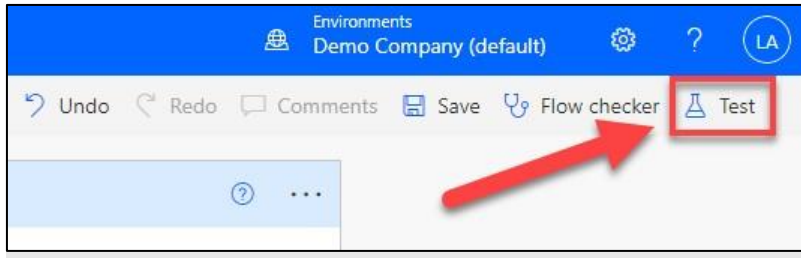
Amount: \$200

Contact: b.friday@wingtipcups.com

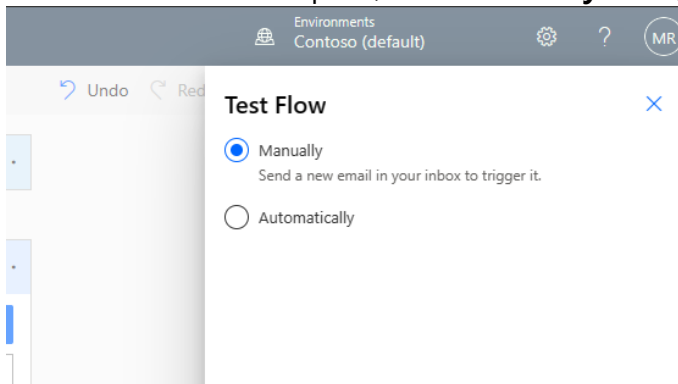
Show advanced options ▼

+ New step Save

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



19. From the **Test Flow** pane, select **Manually**. Then, select **Test** at the bottom of the screen

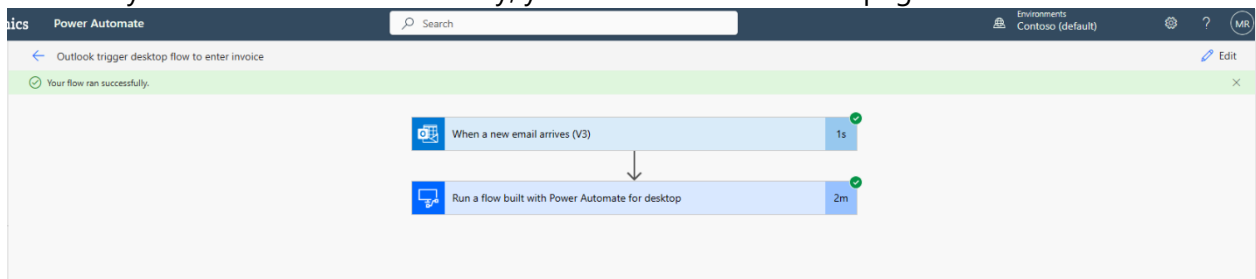


20. Send an email to your demo outlook account with the subject containing **new invoice** and an attachment (from the .pdf files shared in the **Lab 05 Data Packages**).

Note: Do not interact with your device while testing. Desktop flow running will attempt to get the desktop app and bring it in the foreground, as well as populate data in the relevant fields.

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

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



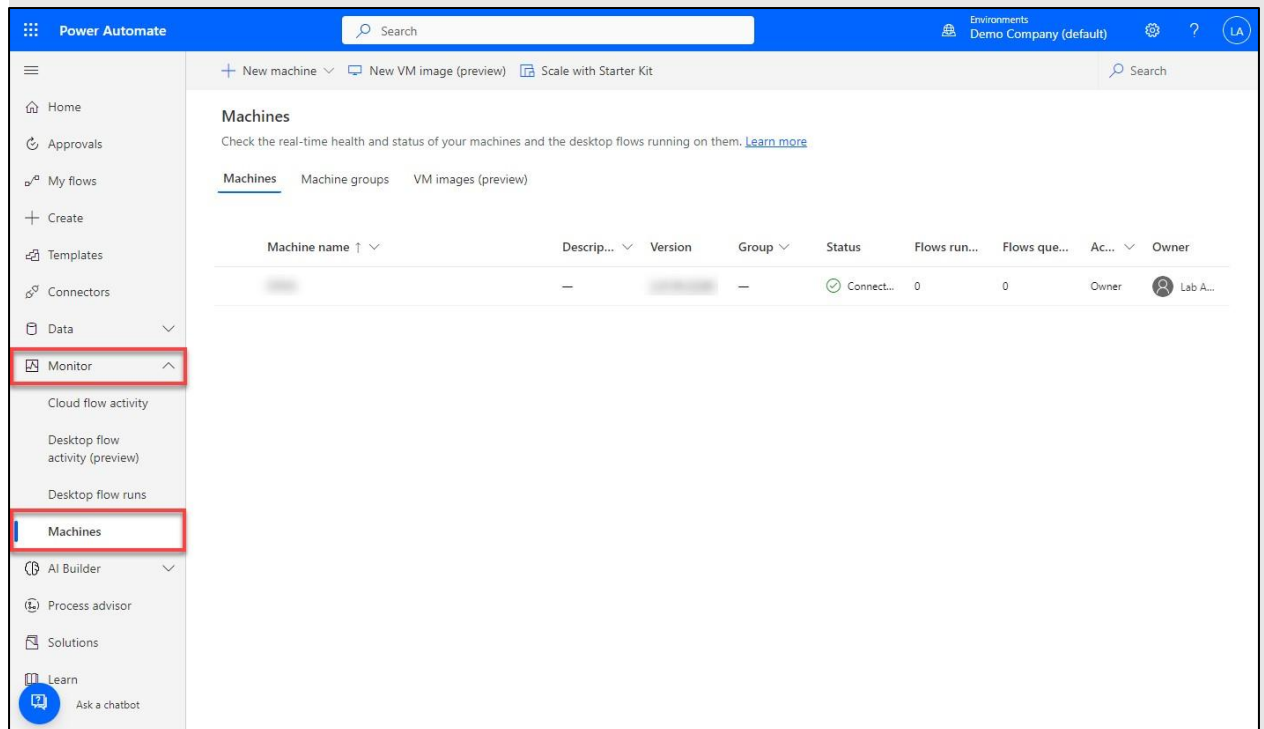
Monitor the list of machines

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.

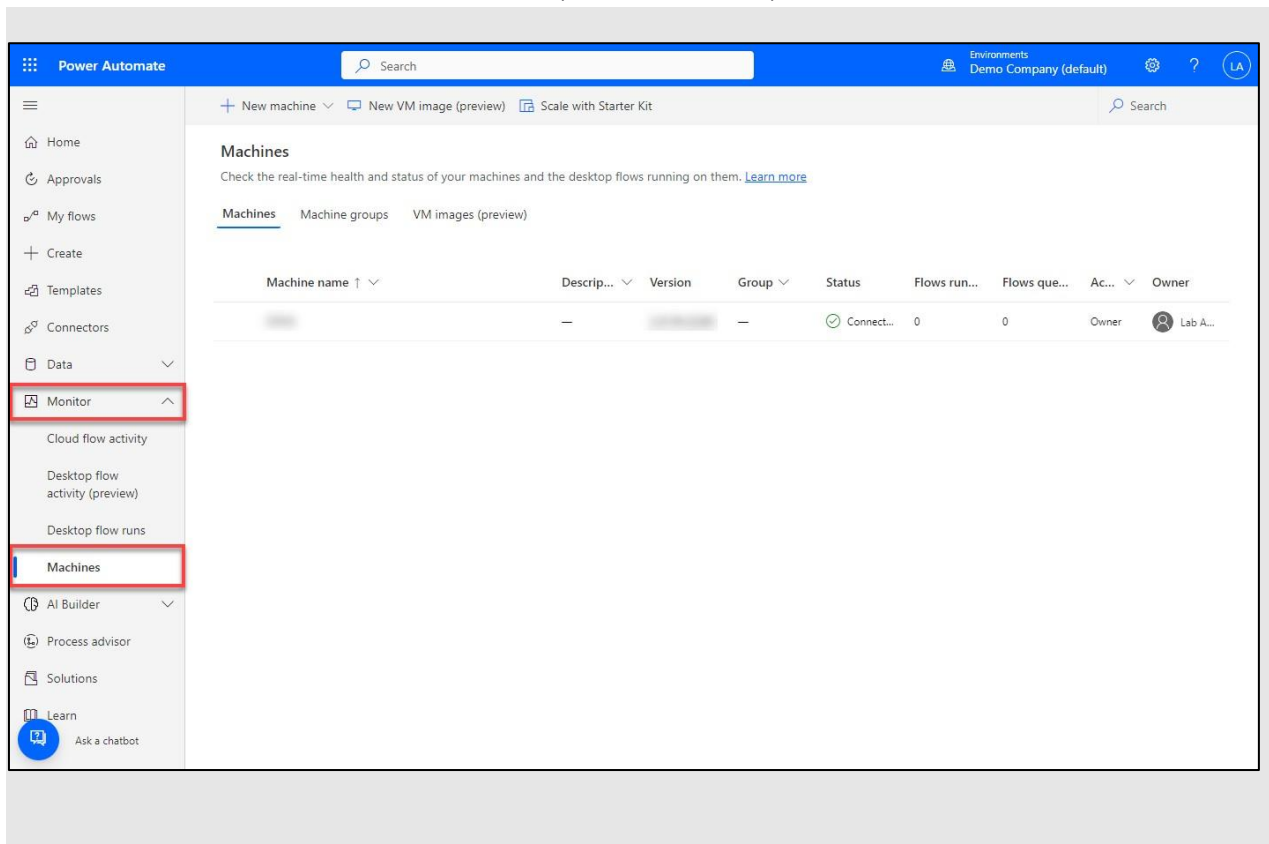


Share a machine

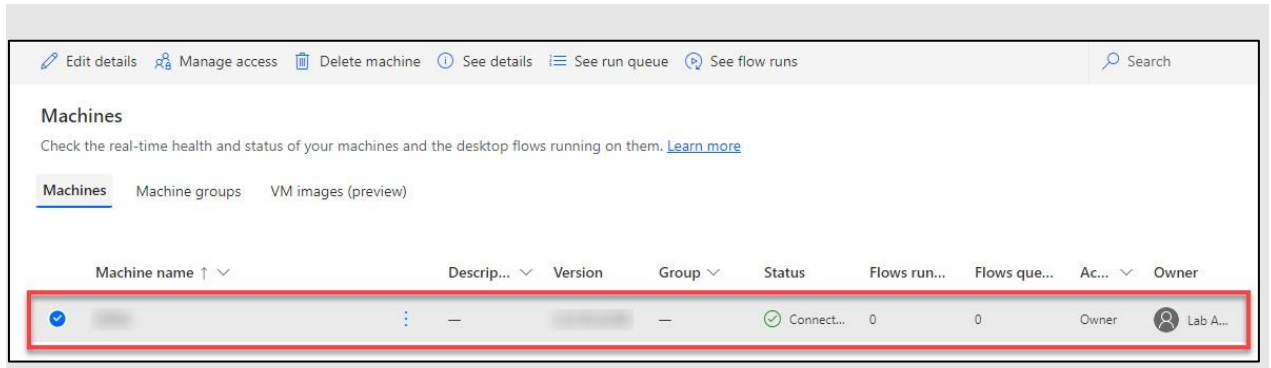
You can also share a machine with other users in your organization, giving those users specific permissions to access your machine and run automation on it. Here are the steps on how to do it.

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.

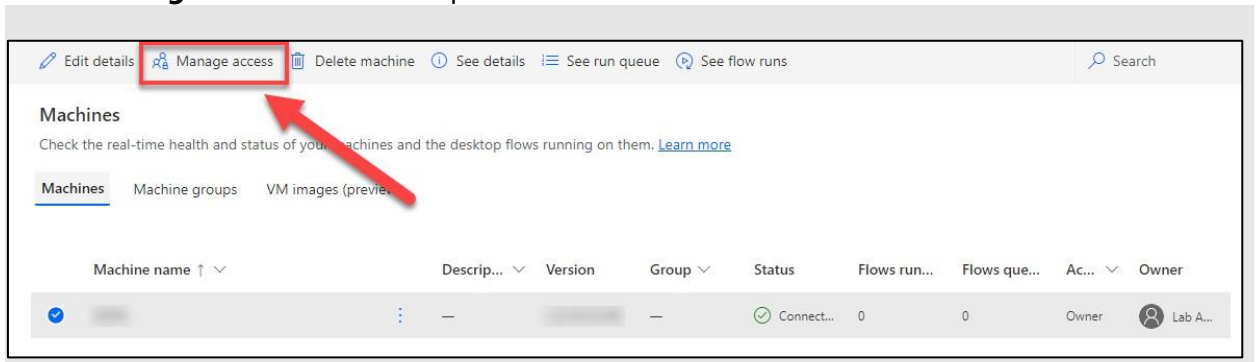
1. Open the test profile in a browser and navigate to powerautomate.microsoft.com. Sign in if needed.
2. From the menu to the left of the screen, select **Monitor**, then select **Machines**.



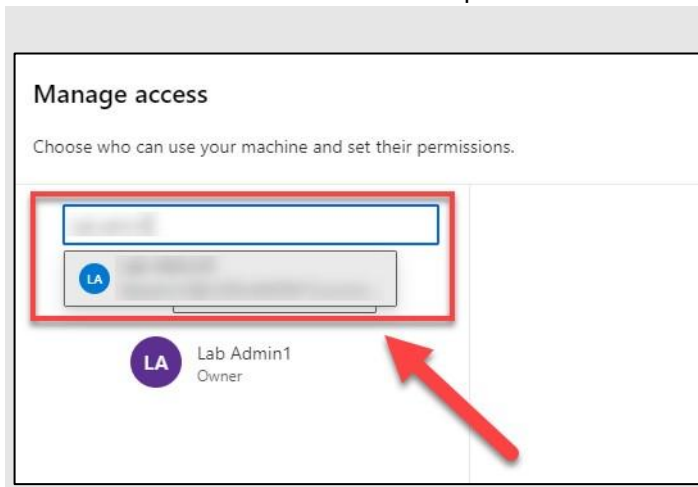
3. Select your machine from the list.



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



5. Select the **Add people** field.
6. Enter the demo email address as explained below, so that they can access the machine.



Add the account that is plus one (+1) from your demo email address.

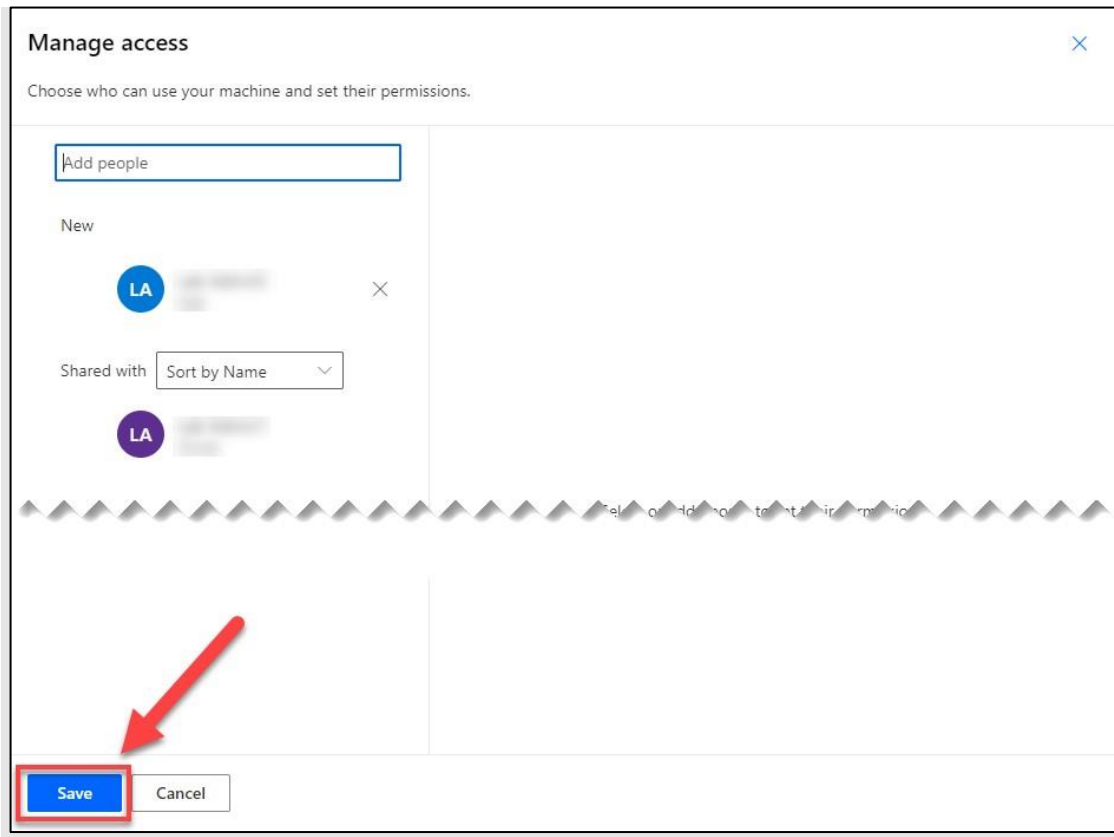
Example: If you have the demo email address MPPCRPA701@XXXXXX.onmicrosoft.com

Then add the email address MPPCRPA702@XXXXXX.onmicrosoft.com

Note: If your demo email address ends with 25 like

MPPCRPA725@XXXXXX.onmicrosoft.com, then add
MPPCRPA701@XXXXXX.onmicrosoft.com

7. Select **Save**.



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

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. You can run a Desktop flow from a Cloud flow either in Attended or in Unattended mode.
 - A. True
 - B. False

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. You can run a Desktop flow from a Cloud flow either in Attended or in Unattended mode.

A. True

B. False

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