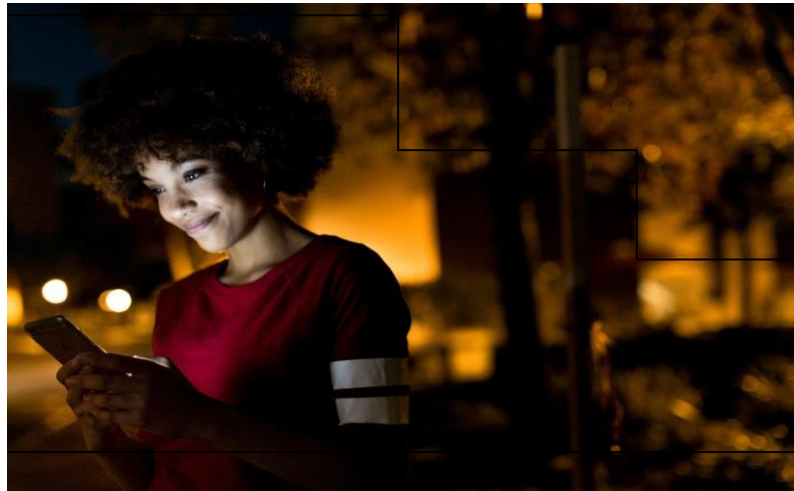


# Redefined in the Age of AI: Power Automate Desktop (PPCC24)

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

30 mins - September 2024



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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** using natural language with Copilot
- 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

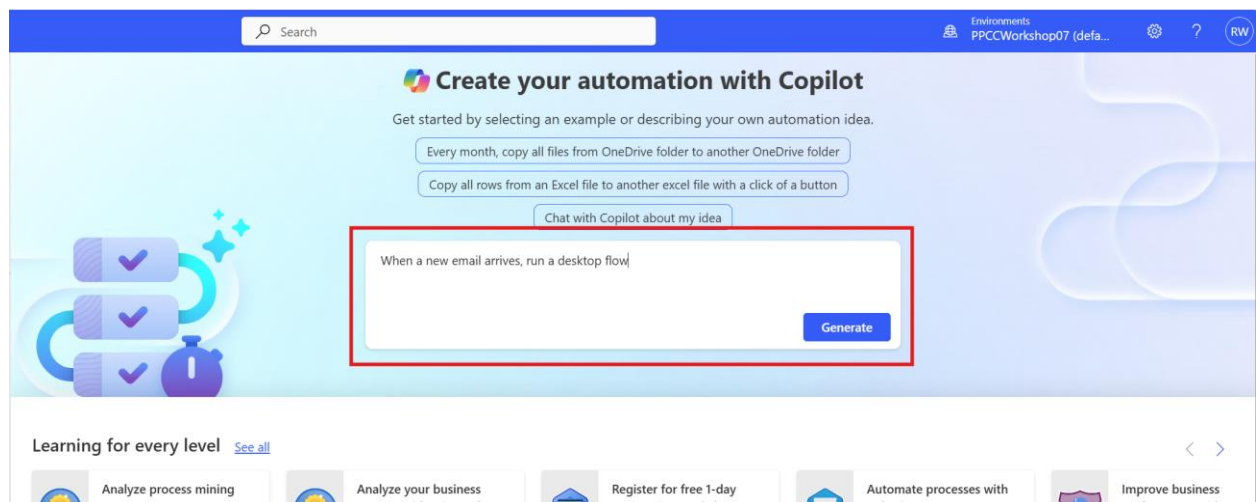
**Note:** this is covered in pre-requisite #1. Your machine should have already been registered on the currently selected environment in the application.

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

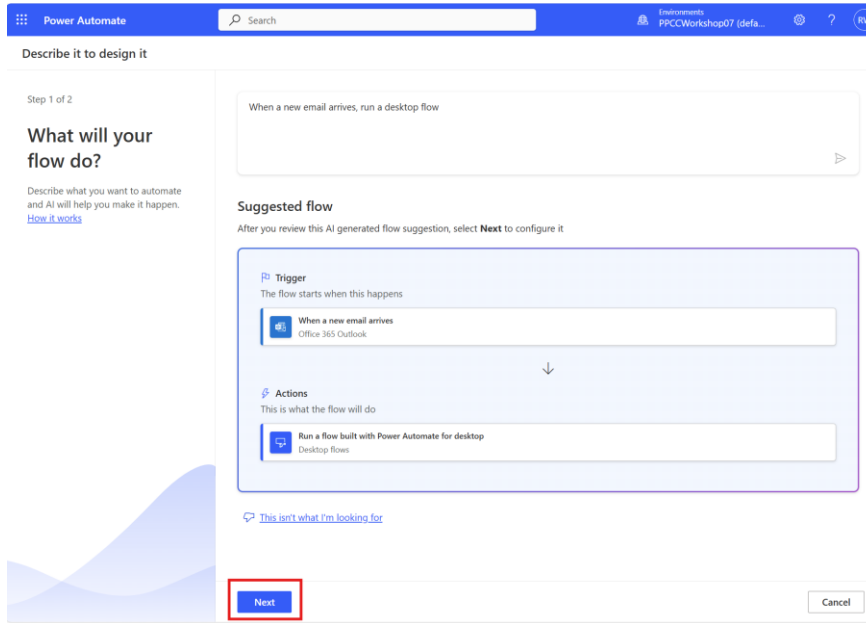
# Create your first cloud flow and a connection to trigger a desktop flow to run on your machine

**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)

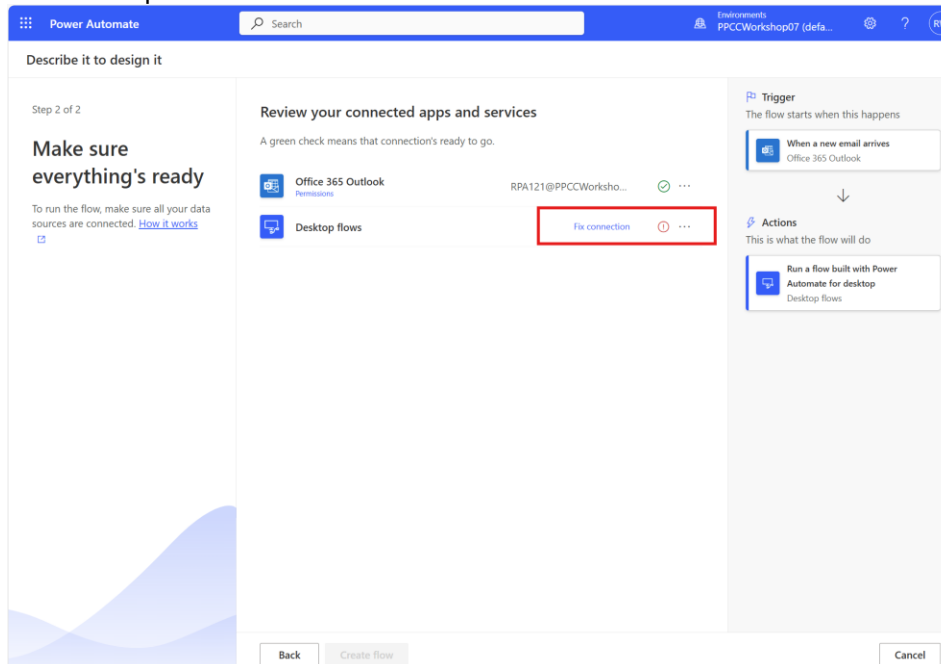
1. Open a new window browser and navigate to <https://make.powerautomate.com>. Sign-in if needed.
2. From the main page in the '**Create your automation with Copilot**' section, type 'When a new email arrives, run a desktop flow' and select **Generate**.



3. Copilot suggests a flow that runs whenever an email arrives and calls a Desktop Flow action. Select **Next**.



4. The desktop flow action requires a desktop flow connection. Select **Fix connection** to configure the desktop flow connection.



5. The interface below allows you to create a new connection.

The screenshot shows the Power Automate interface for creating a new connection. The top navigation bar includes the Power Automate logo, a search bar, and environment information (PPCCWorkshop07). The main content area is titled 'Review your connected apps and services' and includes a sub-header 'Desktop flows'. A green checkmark indicates the connection is ready to go. The interface is divided into three main sections: 'Connect', 'Machine or machine group', and 'Domain and username'. The 'Connect' section has a dropdown menu with 'Connect with username and password' selected. The 'Machine or machine group' section has a dropdown menu with 'Ken Hosted Machine' selected. The 'Domain and username' section has a text box with 'RPA121@PPCCWorkshop07.onmicrosoft.com' entered. The 'Password' section has a text box with '\*\*\*\*\*' entered. A 'Create' button is at the bottom of the form. To the right, the 'Trigger' section shows 'When a new email arrives' from Office 365 Outlook. The 'Actions' section shows 'Run a flow built with Power Automate for desktop' for Desktop flows. At the bottom, there are 'Back', 'Create flow', and 'Cancel' buttons.

- The **Connect** drop down menu offers 3 options like below:
  - Connect with username and password**: Needs a username and a password to connect to the machine.
  - Connect with sign in – Attended**: 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.
- Select the **name** of your machine under **Machine or machine group**.
- 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.

d. Then, select **Create**.

## 6. Select **Create flow**

Describe it to design it

Step 2 of 2

**Make sure everything's ready**

To run the flow, make sure all your data sources are connected. [How it works](#)

**Review your connected apps and services**

A green check means that connection's ready to go.

Office 365 Outlook	RPA121@PPCCWorksho...	✓
Desktop flows	RPA121@PPCCWorksho...	✓

**Trigger**

The flow starts when this happens

When a new email arrives  
Office 365 Outlook

↓

**Actions**

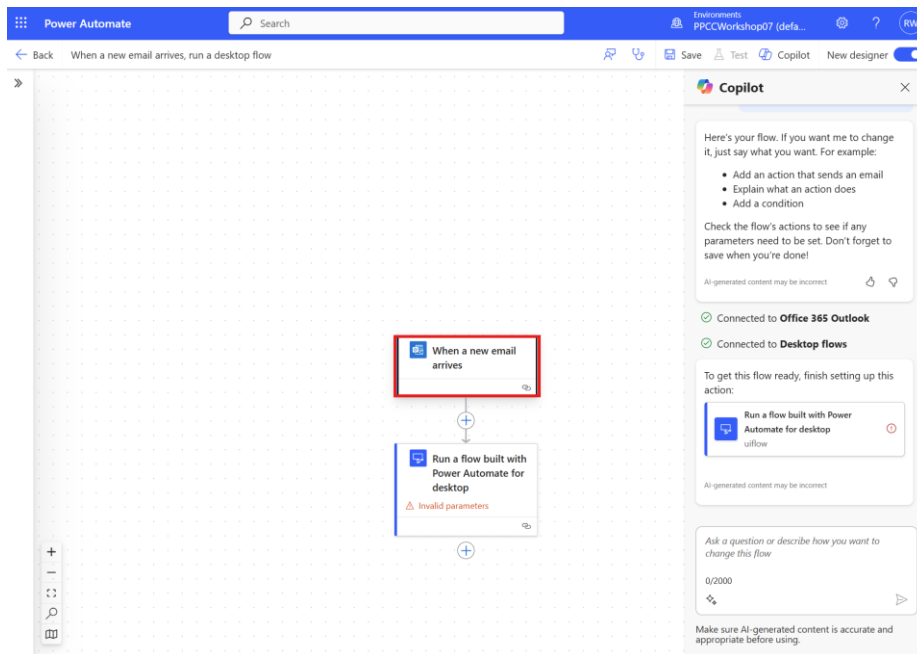
This is what the flow will do

Run a flow built with Power Automate for desktop  
Desktop flows

Back **Create flow** Cancel



7. Expand on the **When a new email arrives** action.



8. Select the **Show all advanced parameters**.

- Select **Inbox** for **Folder**
- Select **Yes** for **Include Attachments**
- Select **Yes** for **Only with Attachments**
- In the **Subject filter** enter **new invoice**

**When a new email arrives**

Parameters Settings Code view About

Advanced parameters  
Showing 9 of 9

To [Switch to Advanced Mode](#)  
Enter part of a name or email address to find people

CC [Switch to Advanced Mode](#)  
Enter part of a name or email address to find people

To Or CC [Switch to Advanced Mode](#)  
Enter part of a name or email address to find people

From [Switch to Advanced Mode](#)  
Enter part of a name or email address to find people

Include Attachments  
Yes

Subject Filter  
new invoice

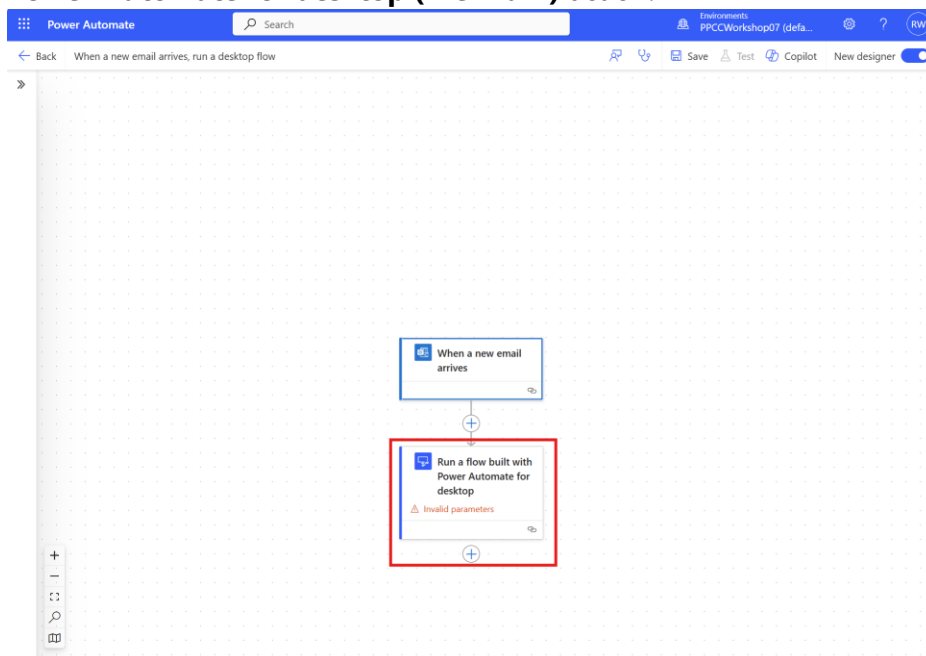
Importance  
Importance of the email (Any, High, Normal, Low)

Only With Attachments  
Yes

Folder  
Inbox

Connected to RPA121@PPCCWorkshop07.onmicrosoft.com. [Change connection](#)

9. Collapse the **When a new email arrives** action and expand on the **Run a flow built with Power Automate for desktop (Premium)** action.



10. In the desktop flow action,

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

b. 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)*

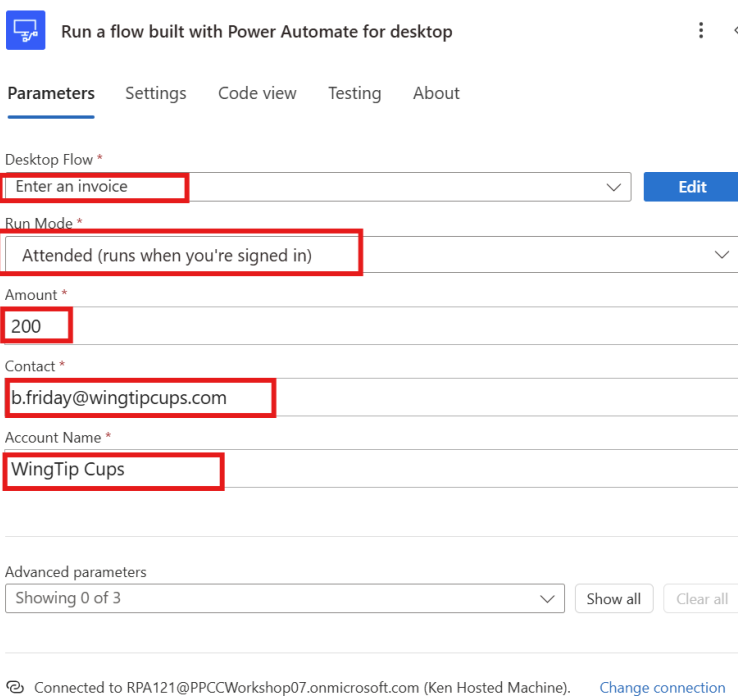
c. Fill in the **Amount**, **Contact** and **Account** boxes with the sample input values below:

*(Note: we are using static input values for now and will learn in the next labs how to use dynamic input values)*

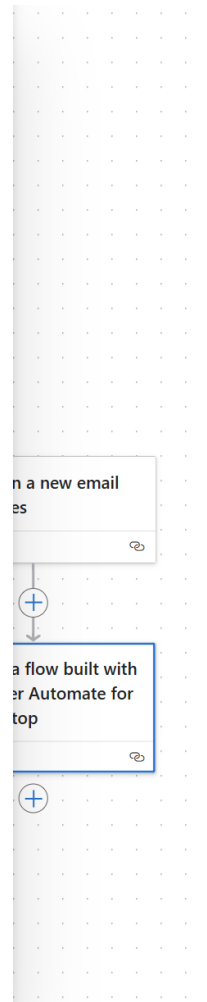
1. Amount: \$200

2. Contact: b.friday@wingtipcups.com

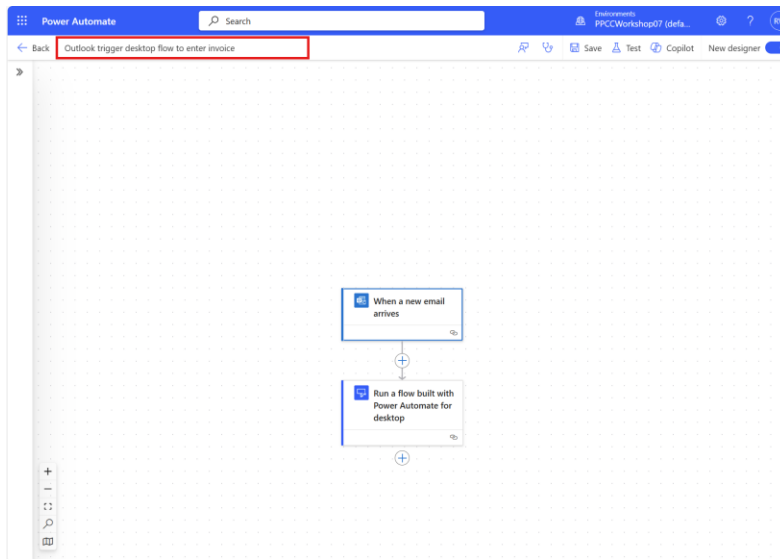
3. Account name: WingTip Cups



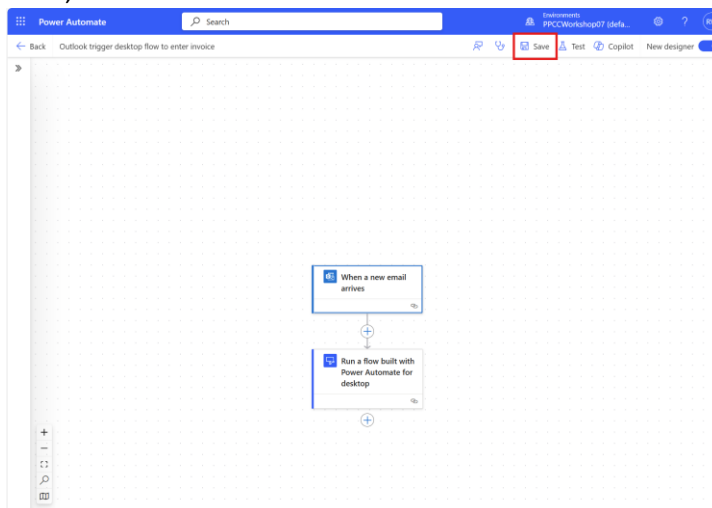
The screenshot shows the 'Run a flow built with Power Automate for desktop' configuration window. The 'Parameters' tab is active. The 'Desktop Flow' dropdown is set to 'Enter an invoice'. The 'Run Mode' dropdown is set to 'Attended (runs when you're signed in)'. The 'Amount' text box contains '200'. The 'Contact' text box contains 'b.friday@wingtipcups.com'. The 'Account Name' text box contains 'WingTip Cups'. Below these fields is an 'Advanced parameters' section showing 'Showing 0 of 3' with 'Show all' and 'Clear all' buttons. At the bottom, it indicates the connection to 'RPA121@PPCCWorkshop07.onmicrosoft.com (Ken Hosted Machine)' with a 'Change connection' link.



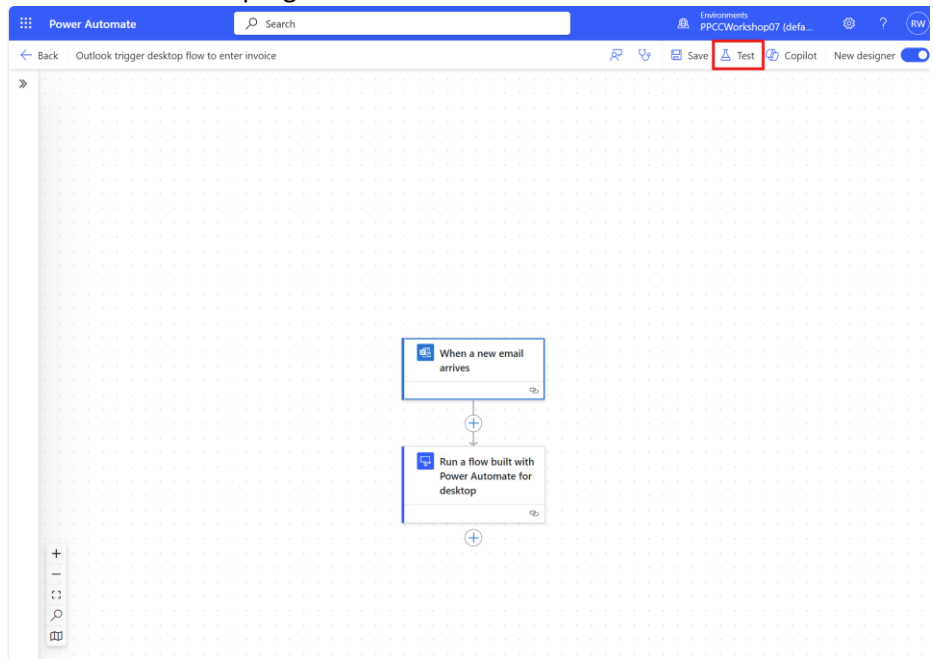
11. Collapse the **Run a flow built with Power Automate for desktop (Premium) When a new email arrives**
12. You can rename the flow by giving it an appropriate name such as 'Outlook trigger desktop flow to enter invoice'.



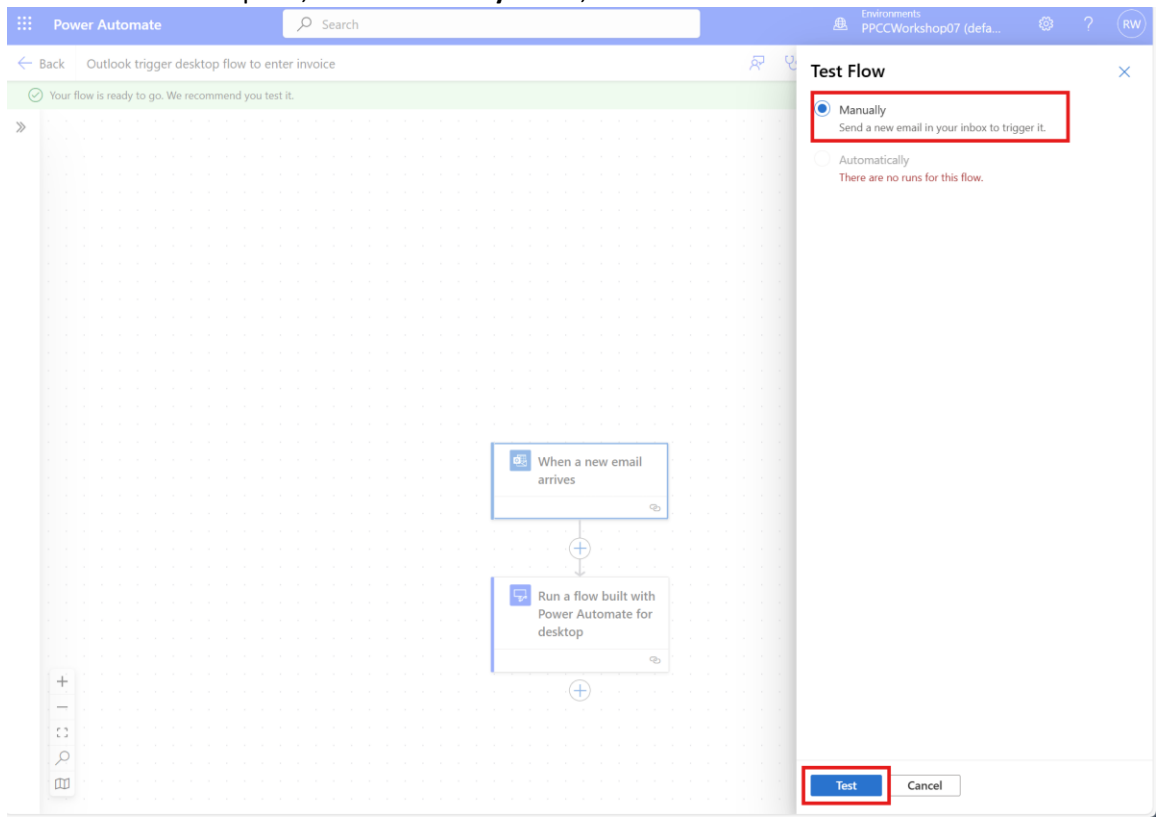
13. Then, select **Save**.



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



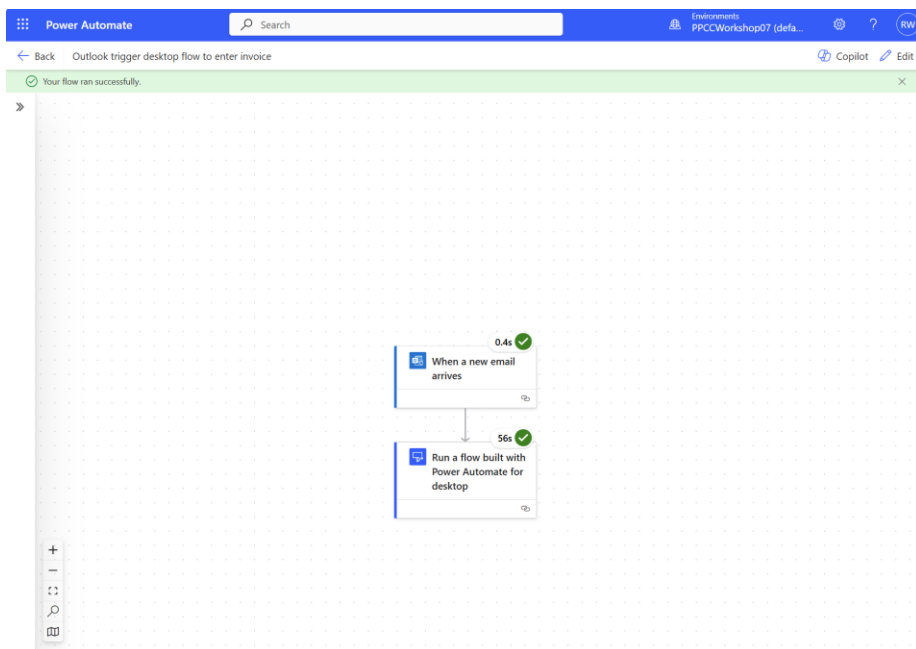
15. From the **Test Flow** pane, select **Manually**. Then, select **Test** at the bottom of the screen



16. Send an email (by going to outlook.com) 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.

17. Watch as your desktop flow will be triggered from the cloud and run on your desktop.
18. After your flow has run successfully, you will see the run detail page.



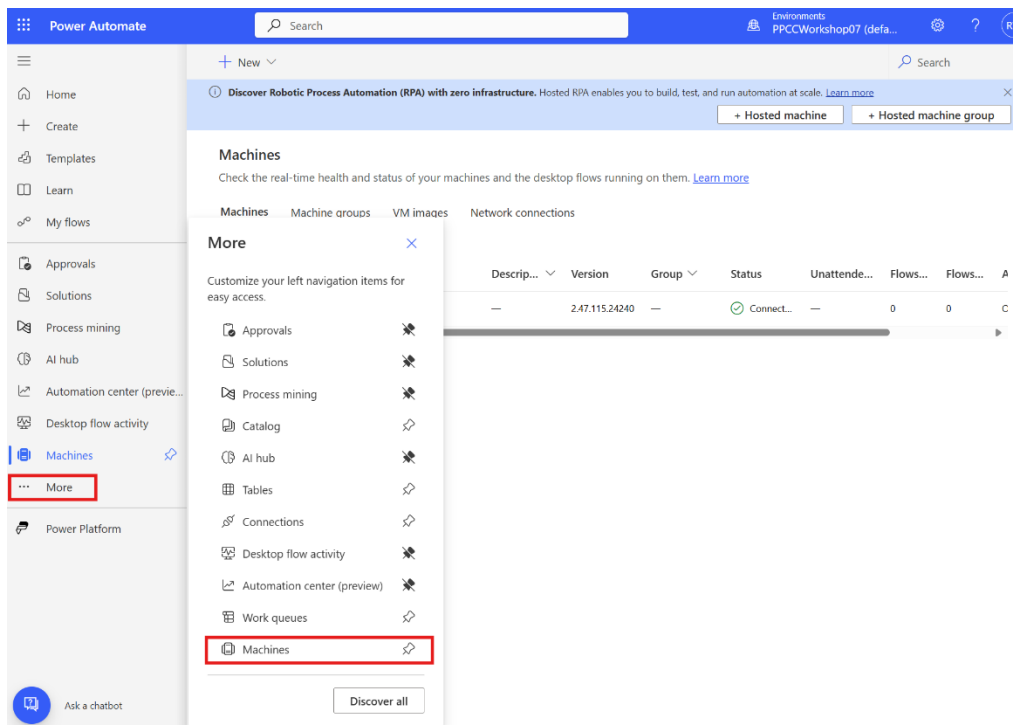
# Monitor the list of machines

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](https://make.powerautomate.com). Then, sign in if needed.
2. Select **More** from the menu to the left of the screen, then select **Machines**. You can pin the **Machines** page for easy access in the future.

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.

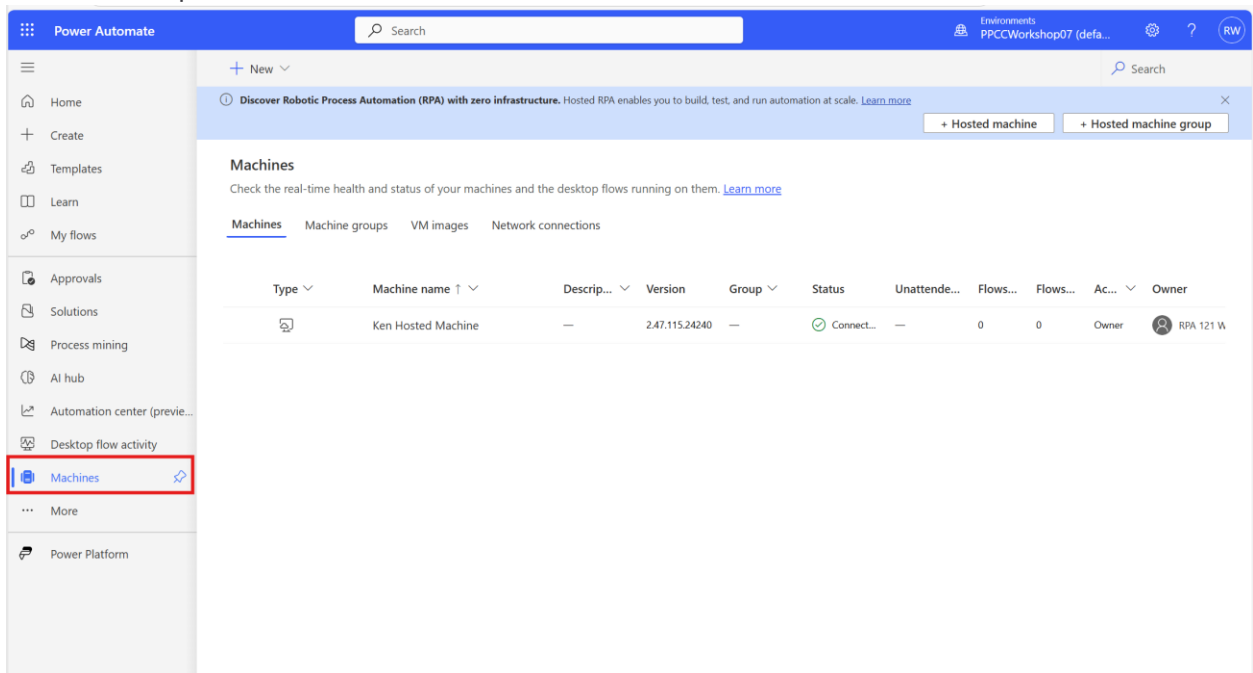


# Share a machine

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.

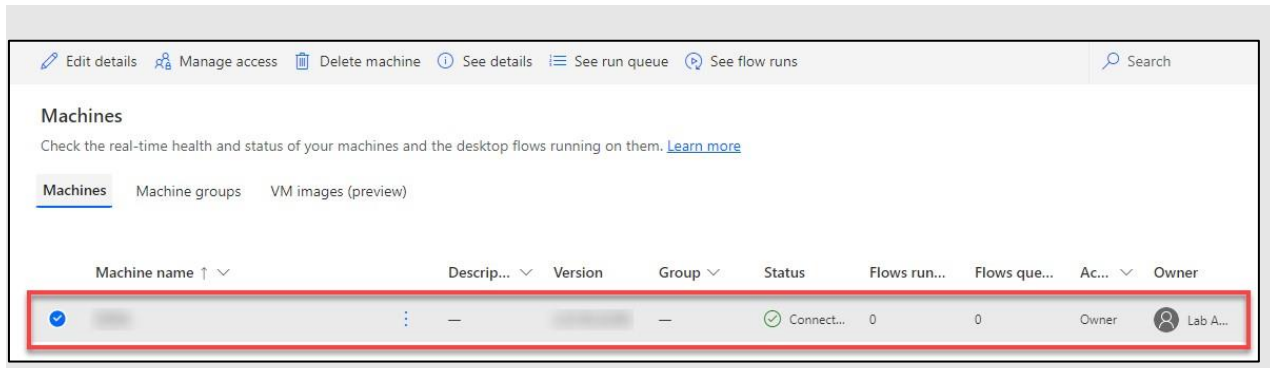
**Note:** you should only share machines with others when there is a real necessary business need, because this action will allow the people who you share machine with to be able to run automations on your machine any time.

1. Open the test profile in a browser and navigate to [powerautomate.microsoft.com](https://powerautomate.microsoft.com). Sign in if needed.
2. From the menu to the left of the screen, select **Machines** (if you have pinned it in the earlier step)

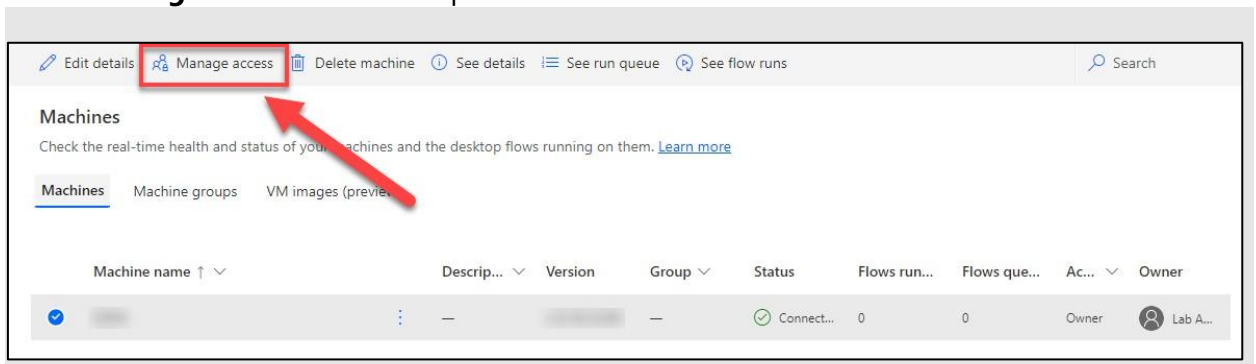


3. Select your machine from the list.

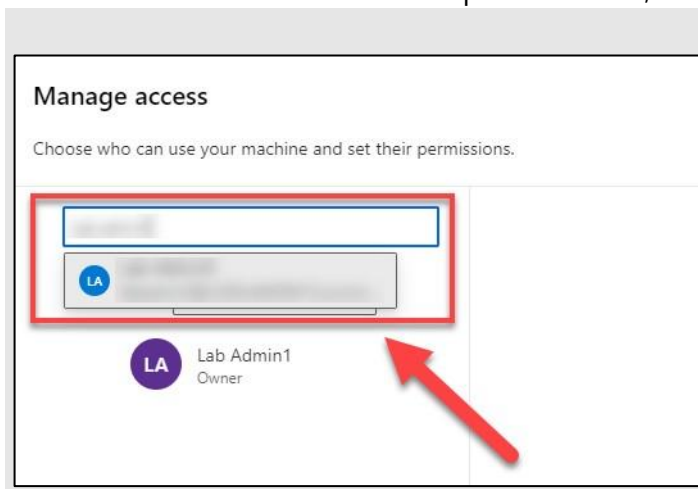




4. Select **Manage access** from the top of the screen.



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

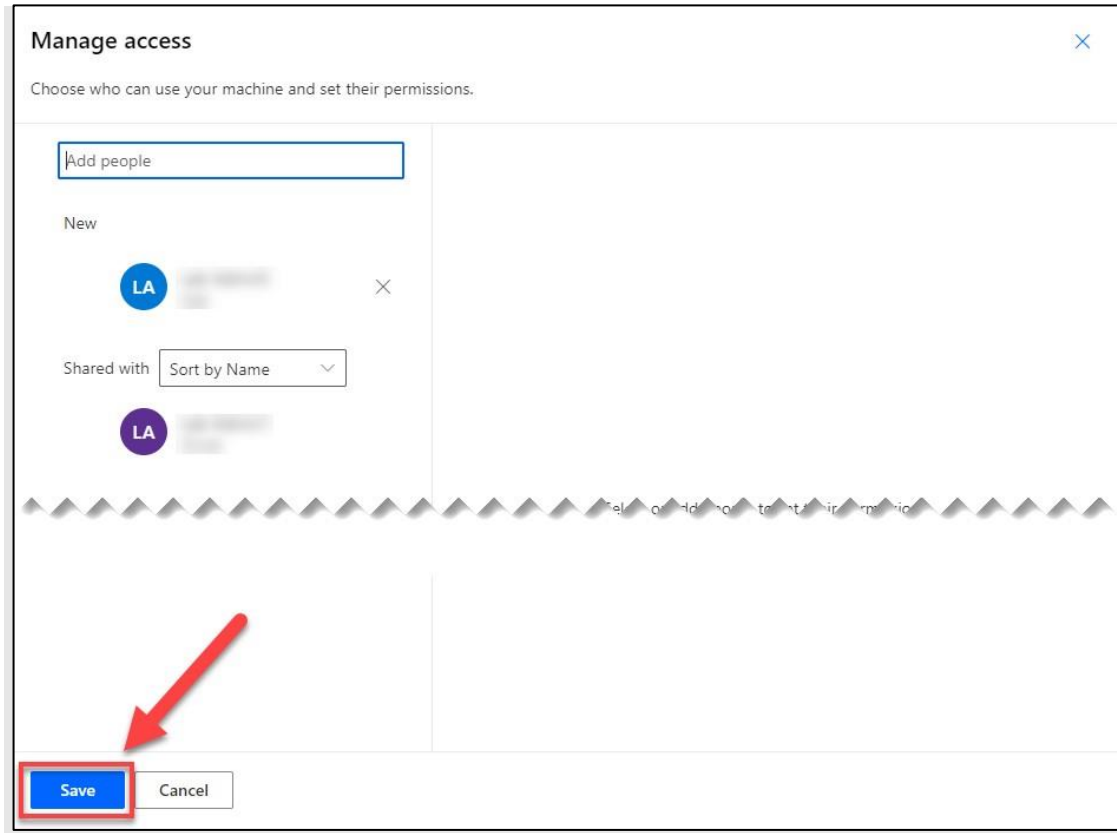


Add the account that is plus one (+1) from your demo email address.

Example: If you have the demo email address RPA121@XXXXX.onmicrosoft.com

Then add the email address RPA122@XXXXX.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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