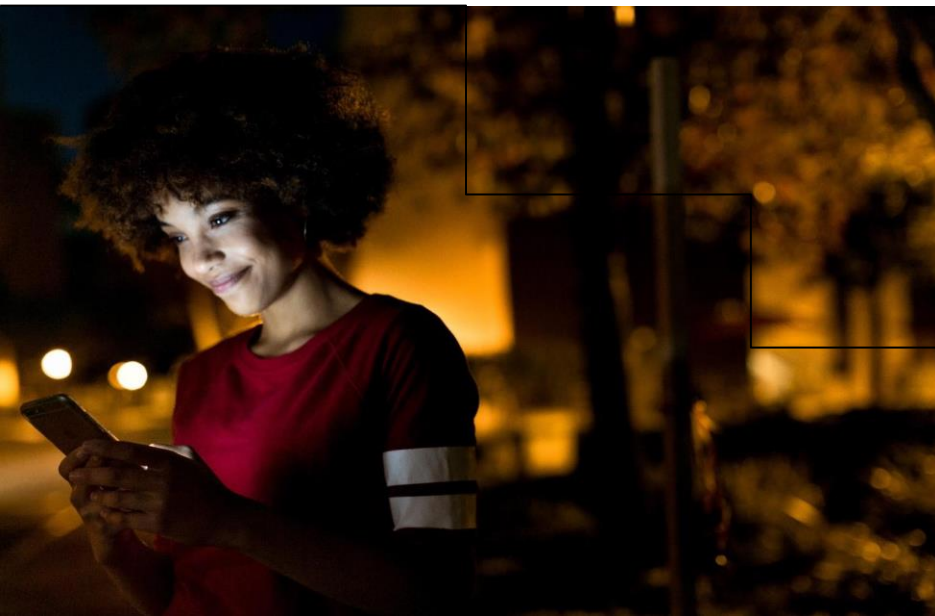


Redefined in the Age of AI: Power Automate Desktop (PPCC24)

Lab prerequisites 1 – Install required software

30 minutes

September 2024



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Pre-requisites: Install required software (required)

This lab will guide you through the steps of installation required software on a virtual machine we will provide or on your computer.

Note: Given the workshop will go through different new Copilot experiences, we recommend you use the hosted machine (option 1 below) and the workshop account we will provide during the day.

That is:

1. Get your login account
2. Set up your hosted machine (Recommended) or use your own laptop
 - a **Option 1:** Create a hosted machine and use it during the workshop
 - i Hosted machine set up
 - ii Update Power Automate for Desktop application
 - iii Install Office applications
 - b **Option 2:** Setup your own machine
 - i Power Automate for desktop app (PAD) and required extensions
 - ii Register your machine to the Workshop environment
3. Installation of the Contoso Invoice App installation

Get your workshop account

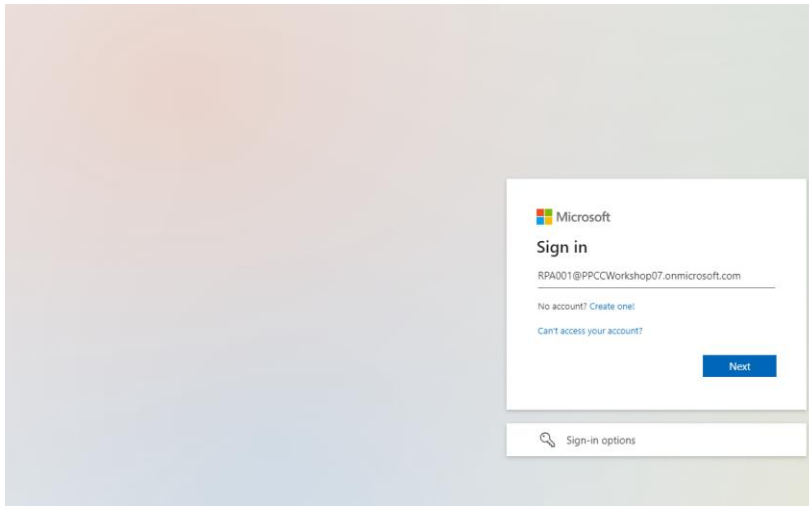
1. To retrieve your account, use the 3-digit number you received and replace “XXX” below:
 - Your account → RPAXXX@PPCCWorkshop07.onmicrosoft.com
 - Your password → Shared by presenters and moderators in the room.
2. You may write copy/write down your login and password in a notepad for easy access during the workshop.

Next step is to create a hosted machine that you’ll use during the day. If you want to use your own machine, you may not be able to do all the labs (especially the Copilot-related ones). Additionally, please make sure you are an admin of your machine.

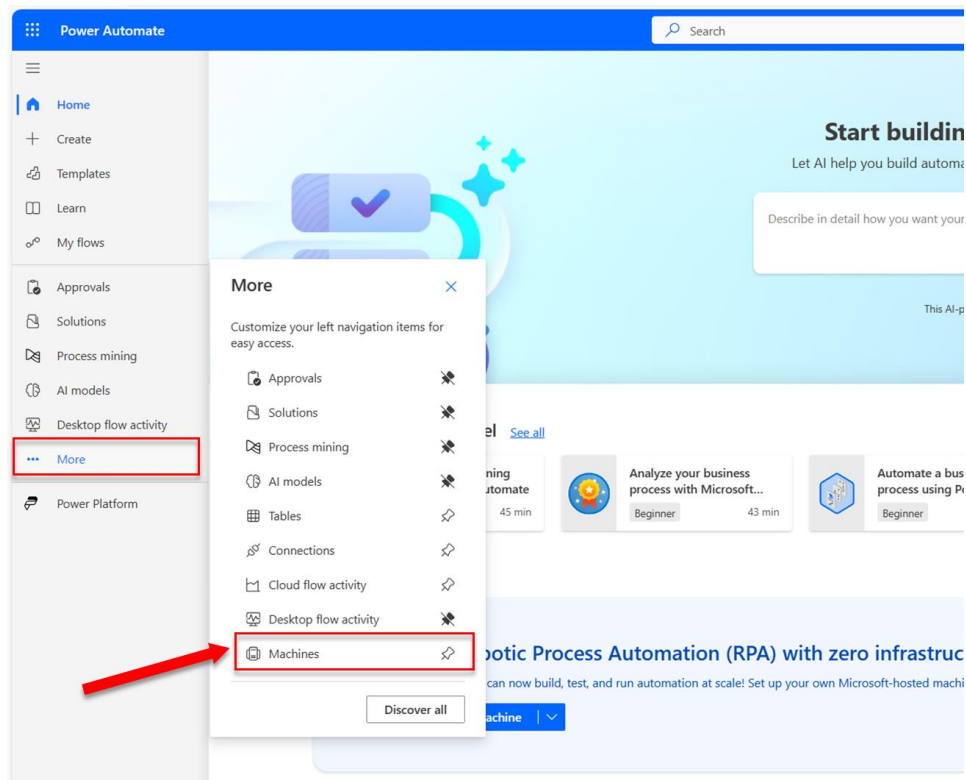
Note: Please check machine requirements: ensure you log into your machine using an account with permission to install software, preferably an account with local administrator rights. The machine should have minimal Win10 Pro OS (operating systems) (or Win server 2019/2016 OS), .Net 4.7.2 and Edge (chromium)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

Option 1: Create and use a hosted machine

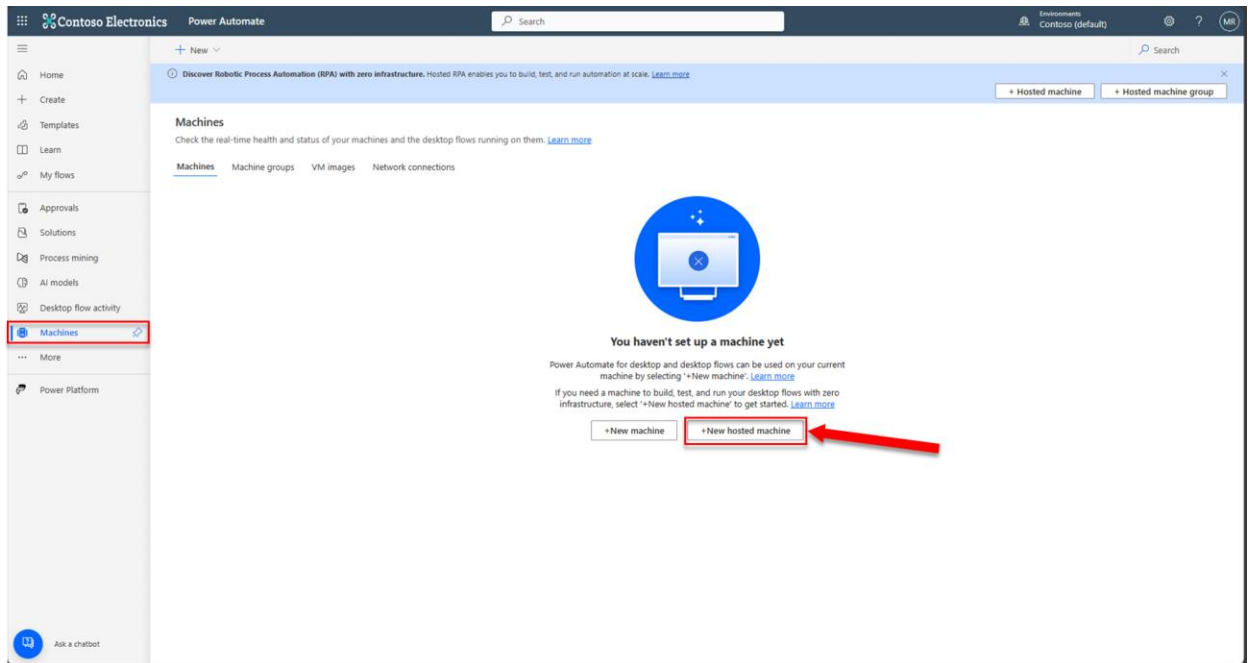
1. Go to Powerautomate.com, sign in with your workshop account (RPAXXX@PPCCWorkshop07.onmicrosoft.com)



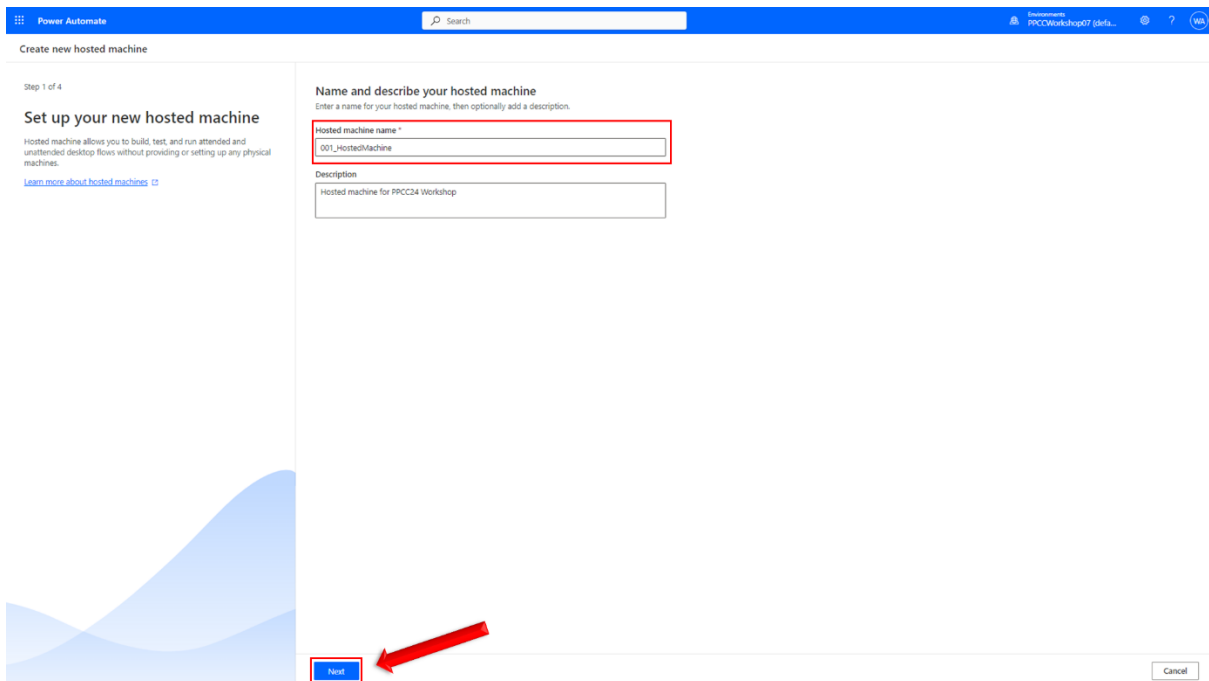
2. Go to the left nav and select **...More** then **Machines**



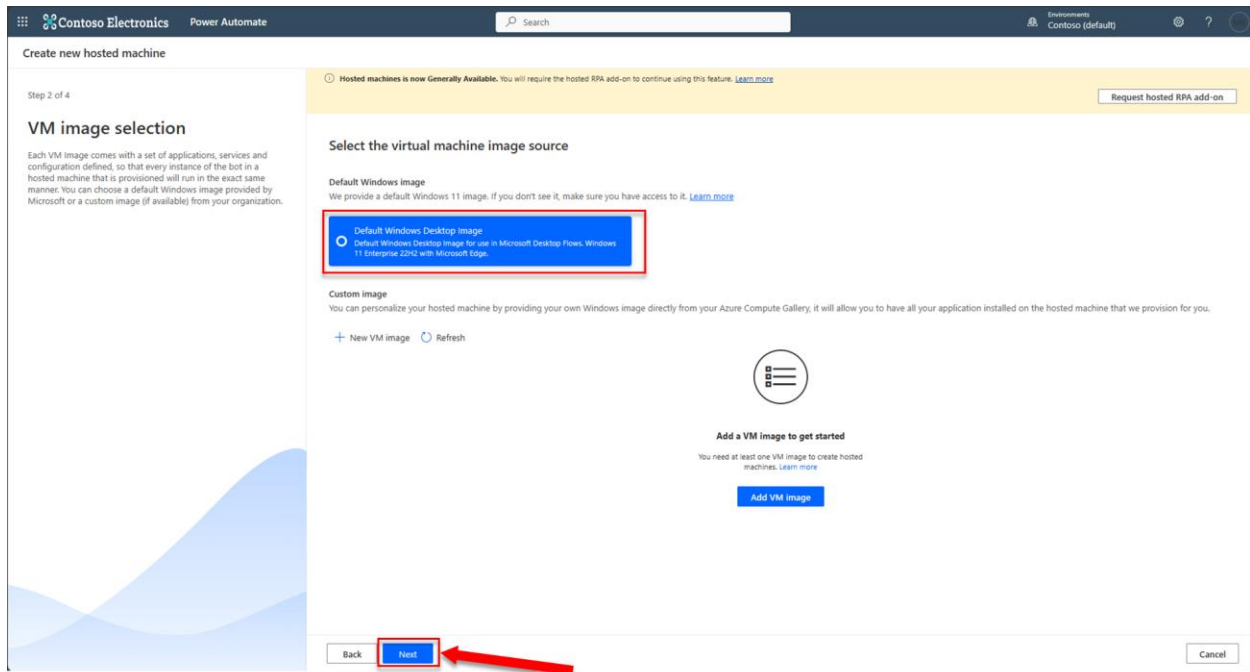
3. Select **New Hosted machine**



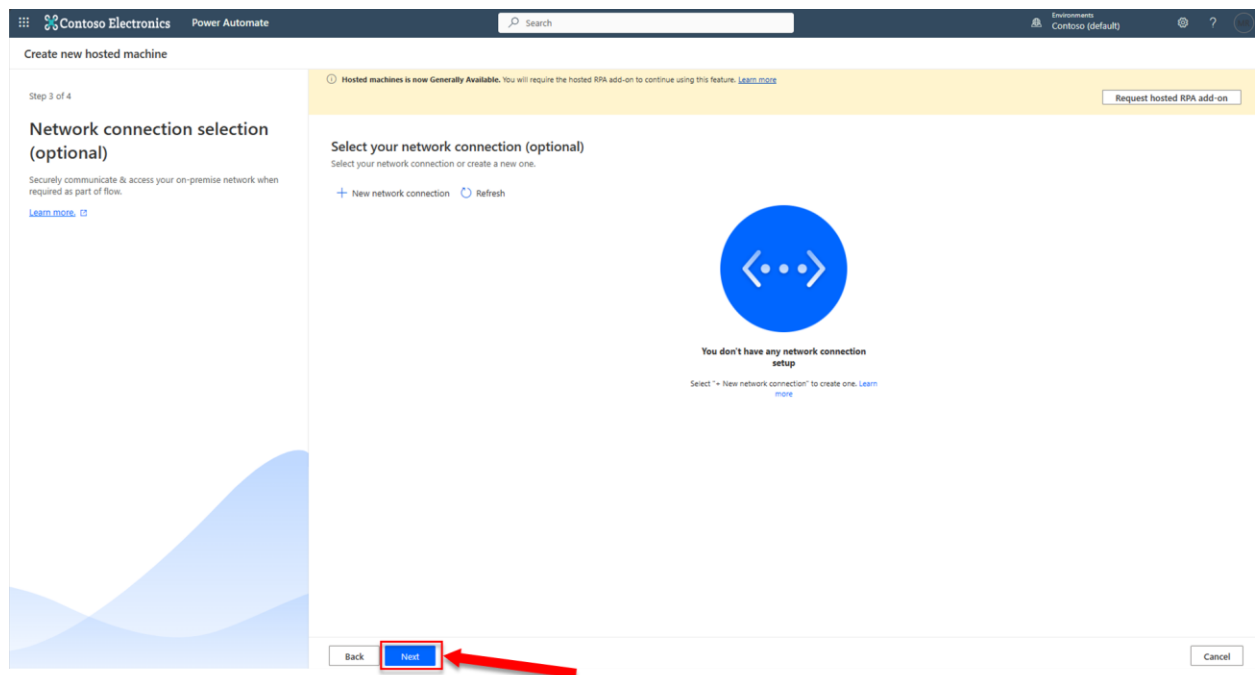
4. Give your hosted machine a name: **'XXX_HostedMachine'** where XXX is your workshop ID number (e.g.: 001), then click **Next**.



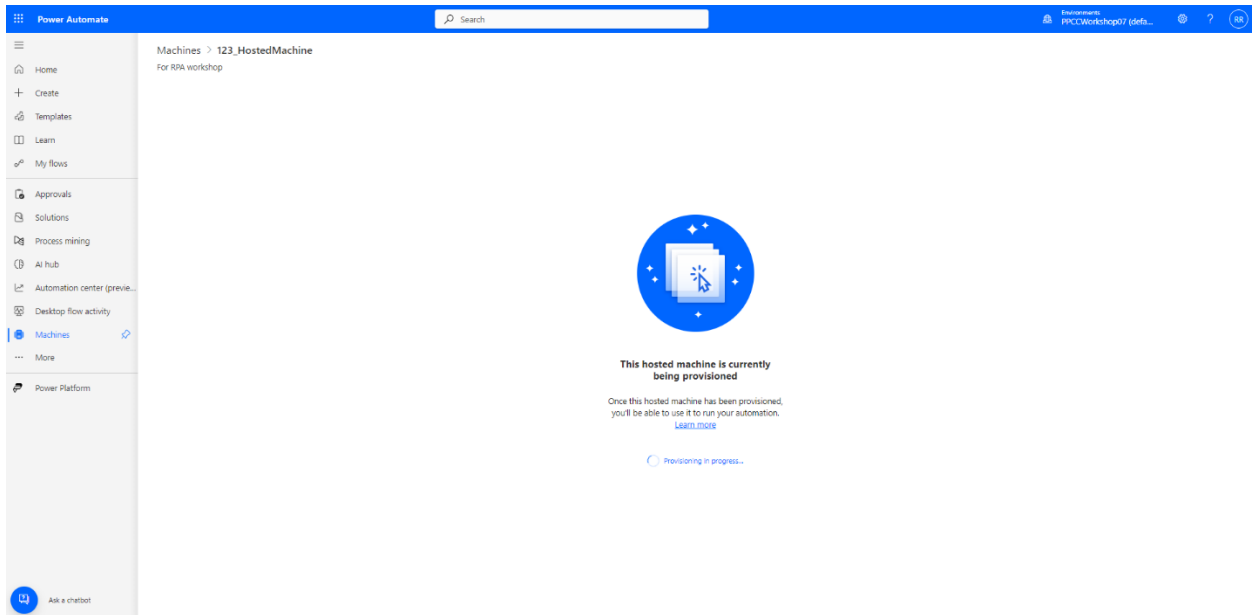
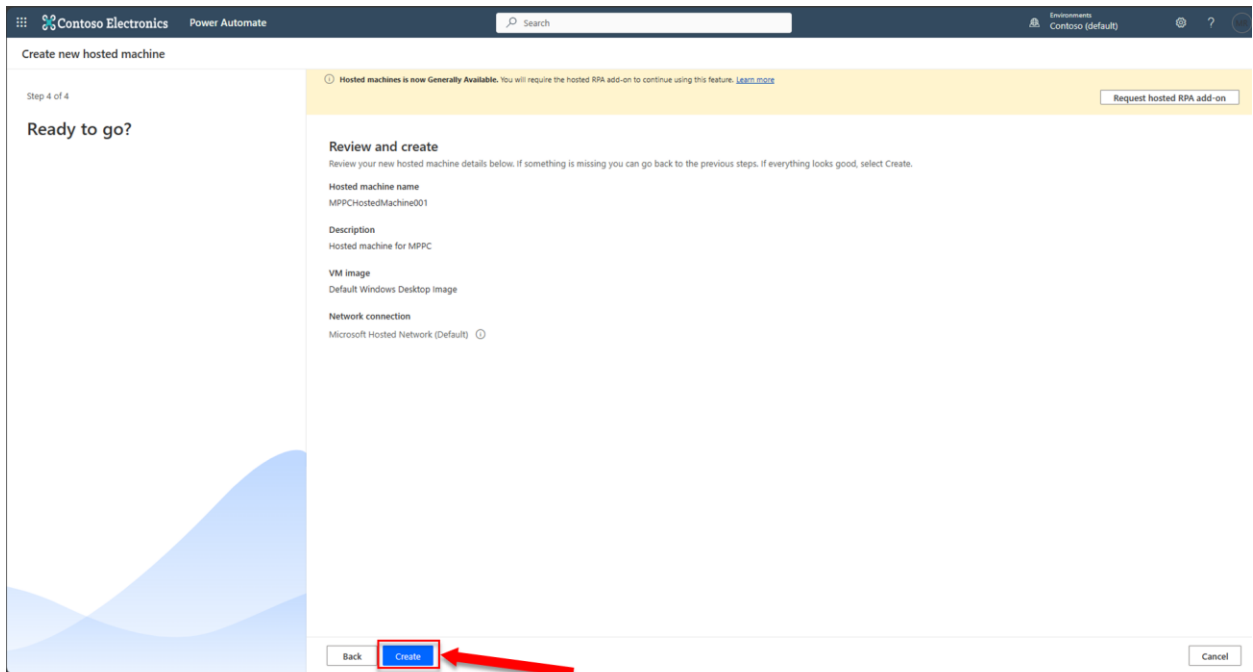
5. Select the default Windows Desktop Image which is suitable for Web automation. It is a Vanilla Windows 11 image without any software installed except Microsoft Edge. Then click **Next**.



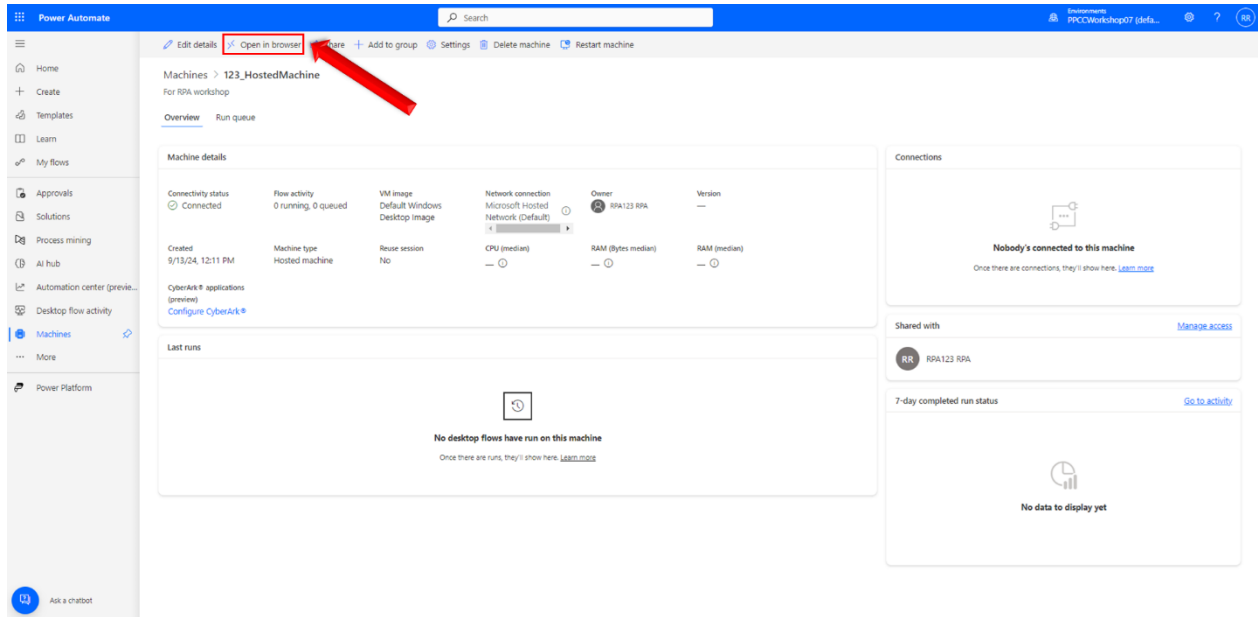
- The 3rd step is optional and only required if you need your hosted machine to be able to access your corporate network resources (like an on premise SQL server). Here we don't need anything like that, we can just press **Next** and skip this step.



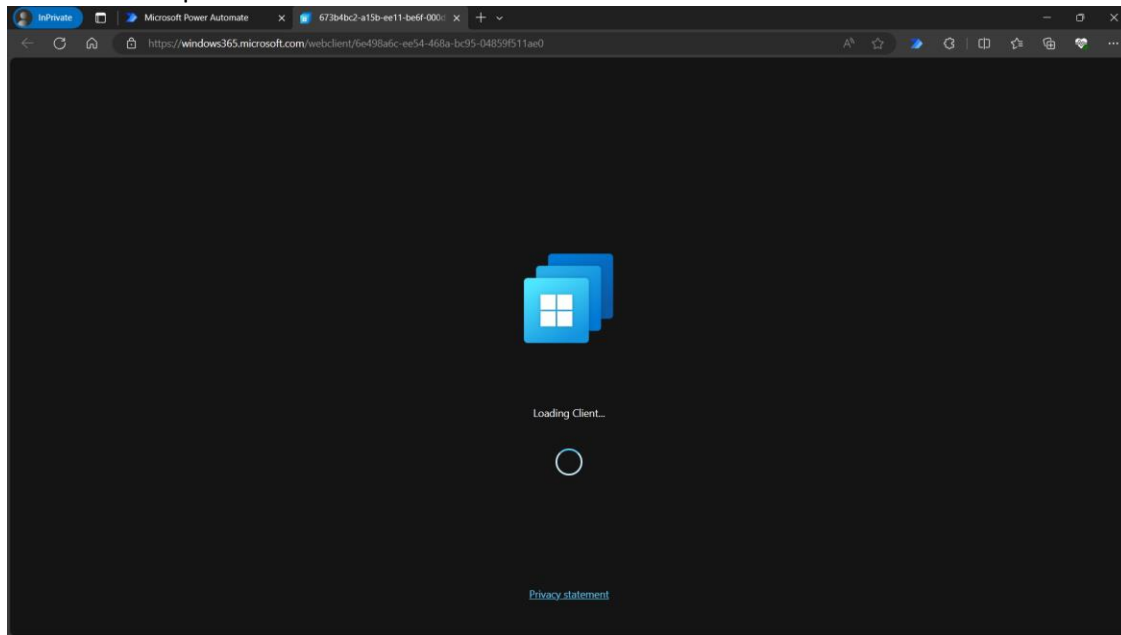
- That's it, you're ready to launch the creation of your hosted machine. Click on **Create**.

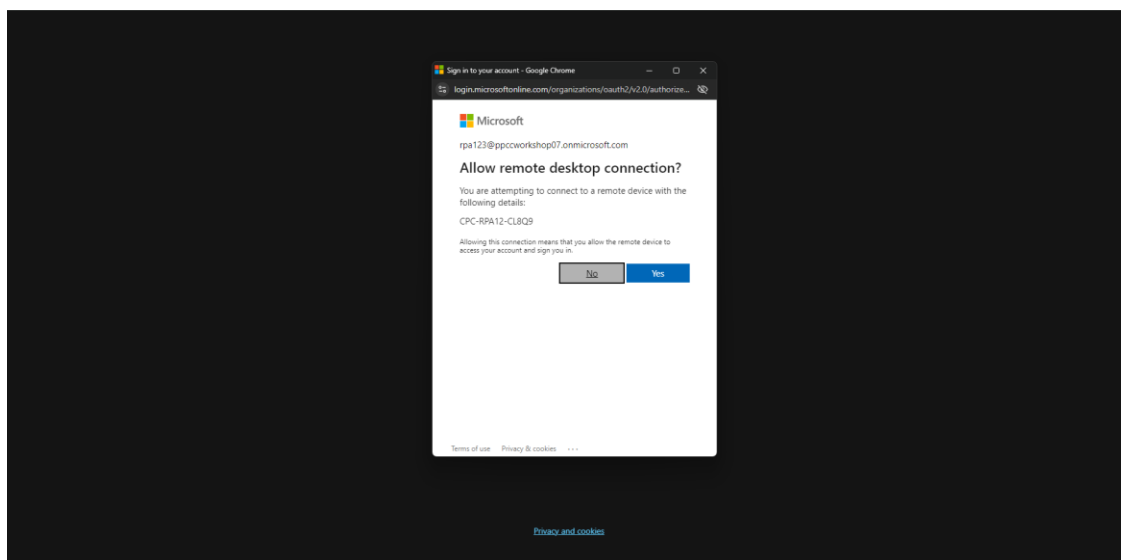
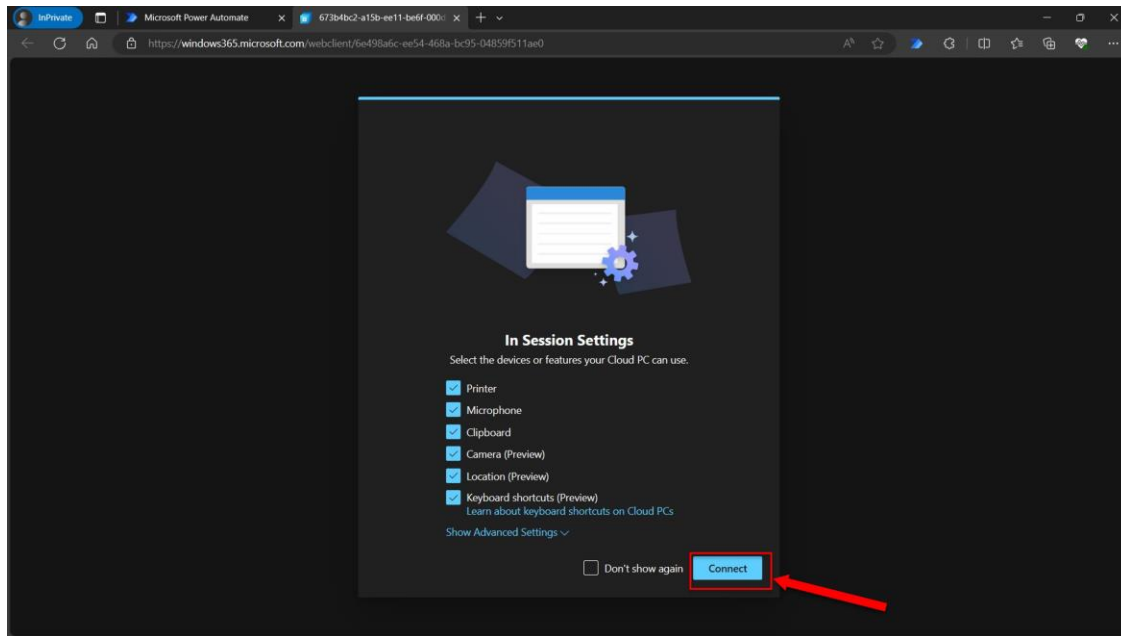


8. It will take up to **20 minutes to get your hosted machine created**. Once it is available, you will be able to login to it. Once its status becomes “connected”, click on the machine name to go to the details page, then select the “**Open in browser**” option:

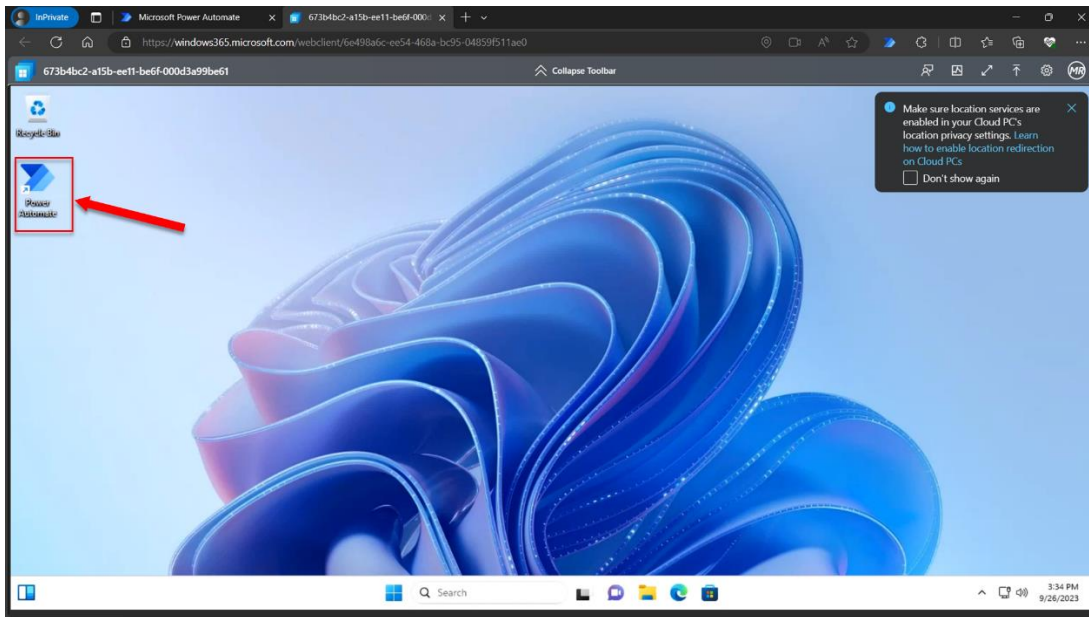


- This will open the machine in a new browser tab, click on **“Connect”** button and allow remote desktop connection:

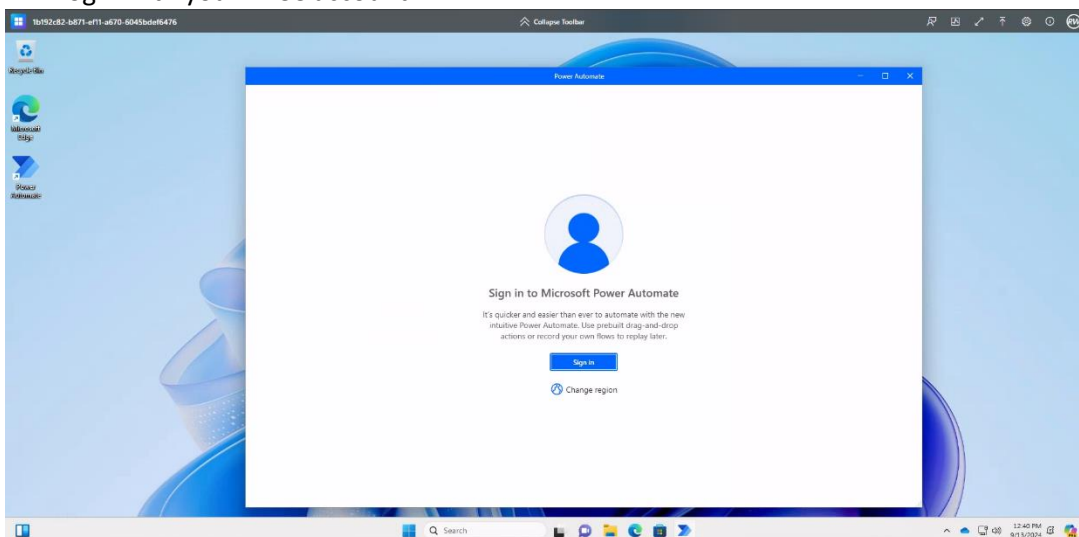




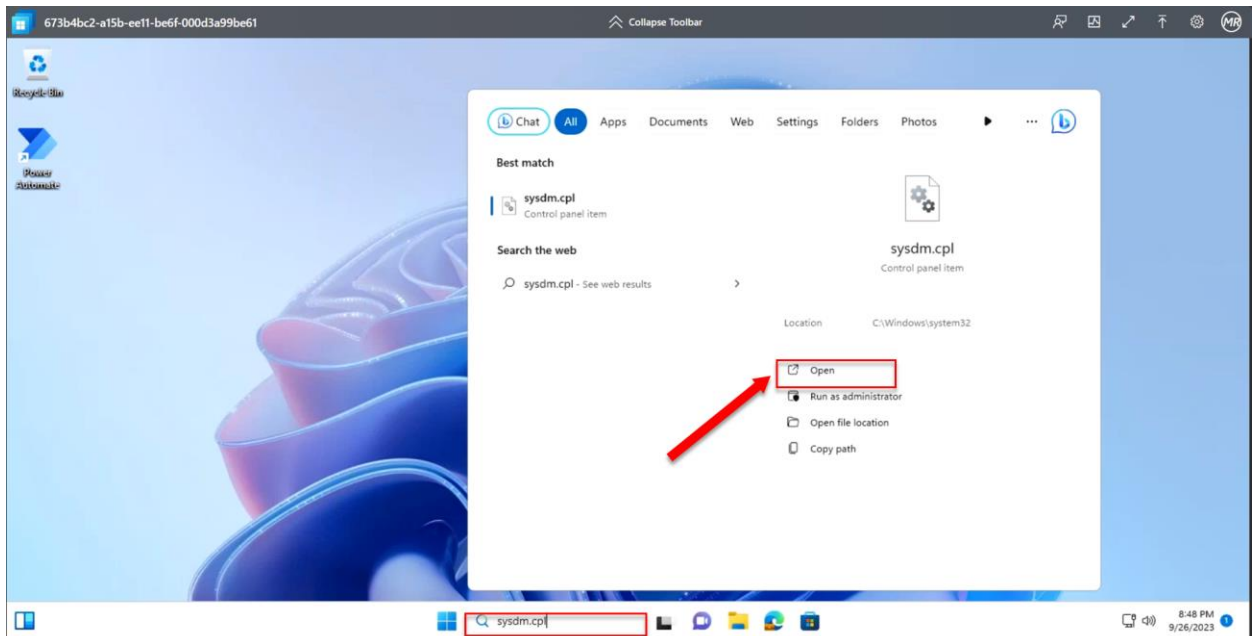
10. Your machine is ready to go, open **Power Automate for Desktop** using the shortcut from the desktop:



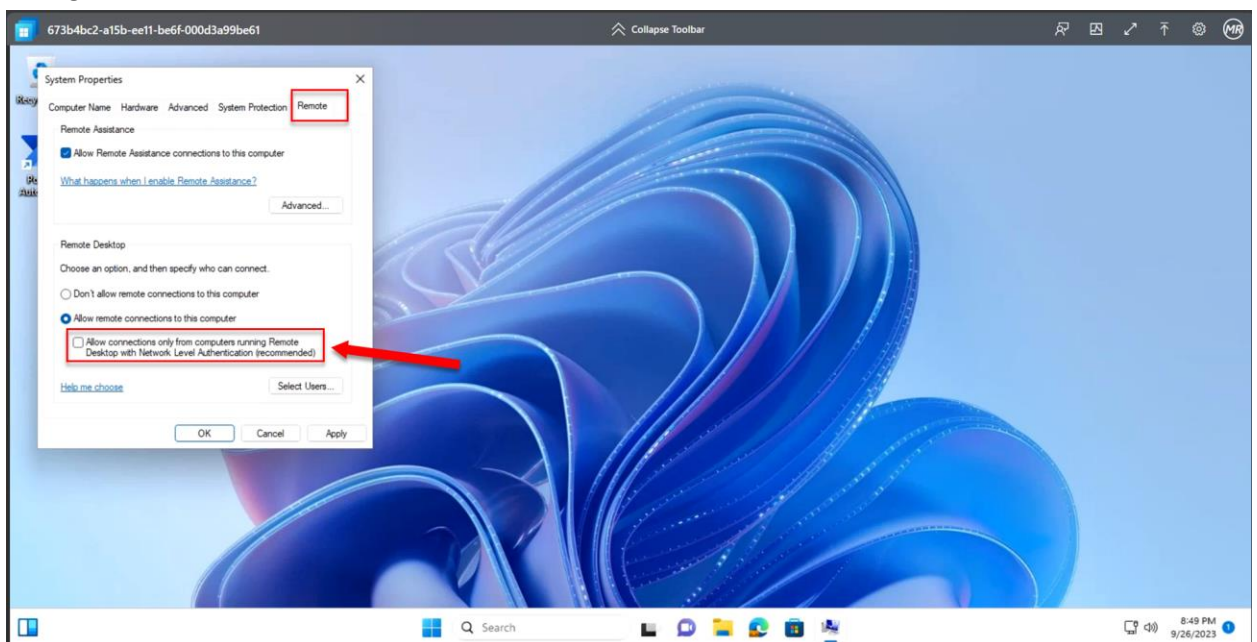
11. Login with your PPCC account:



13. To run unattended, you will need to disable an option that prevents desktop flows to run unattended. In the search bar type in: **sysdm.cpl** and click **open**:

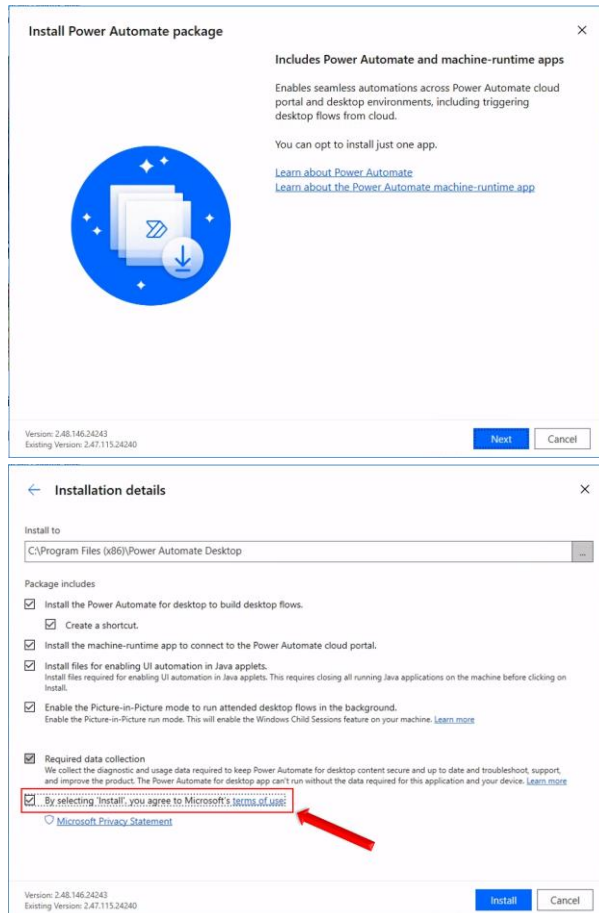


14. Go to **Remote** tab, Ensure **Allow connections only from computers running Remote Desktop with Network Level Authentication** checkbox is unchecked. Then click on **Apply** and **OK** to close the dialog box.

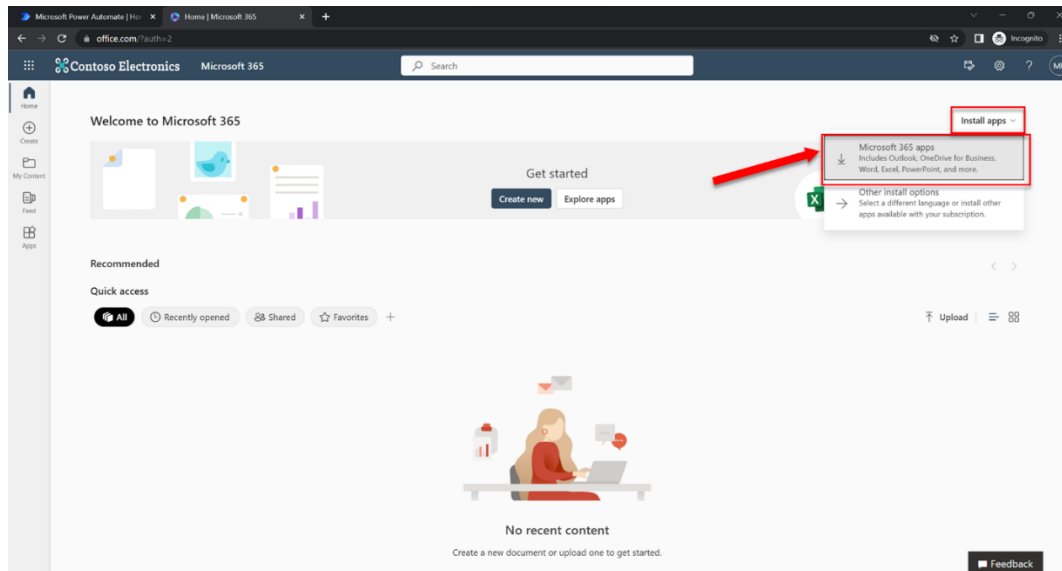


15. This workshop will allow you to discover the new AI Recorder feature rolling out in Preview. It is available starting from version 2.48 and requires you to update the Power Automate for Desktop application automatically installed with your hosted machine.

You need **Power Automate desktop version 2.48 or higher**. Open Microsoft Edge and copy this URL to the address bar: <https://aka.ms/DownloadPAD48> to download the last version. Then go through the installation steps.



16. Some labs require Office applications to be installed. Go to Office.com, sign-in with your workshop account then select **install apps** button:



17. Keep your hosted machine tab opened, you'll come back to it later.

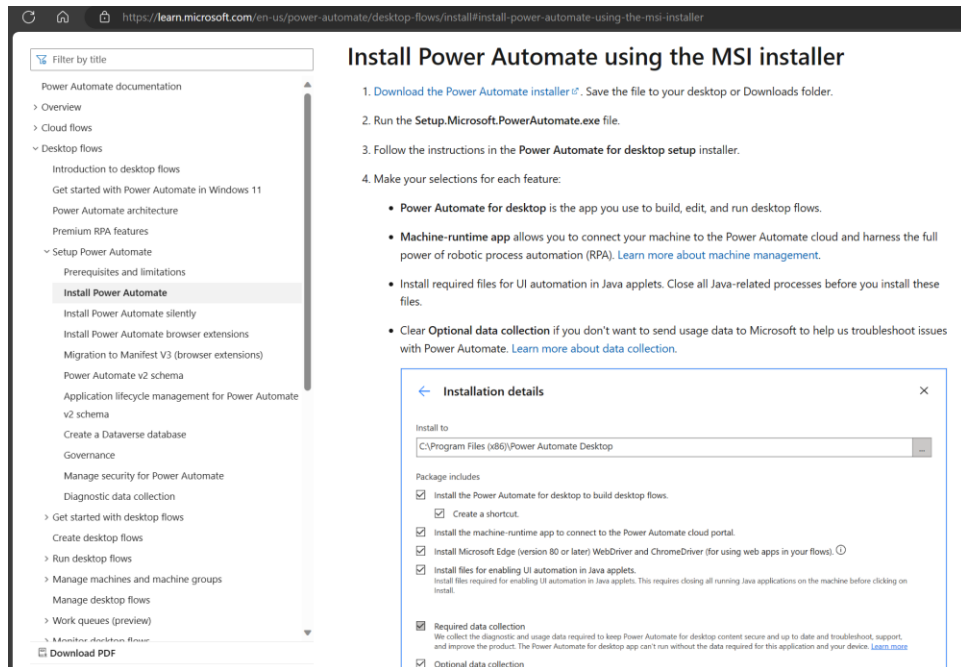
Option 2: Setup your own machine

You can skip this section if you use a hosted machine. If you want to use your machine and your own account during the workshop, please make sure you have a premium license (or trial enabled) and access to an environment with Copilot enabled.

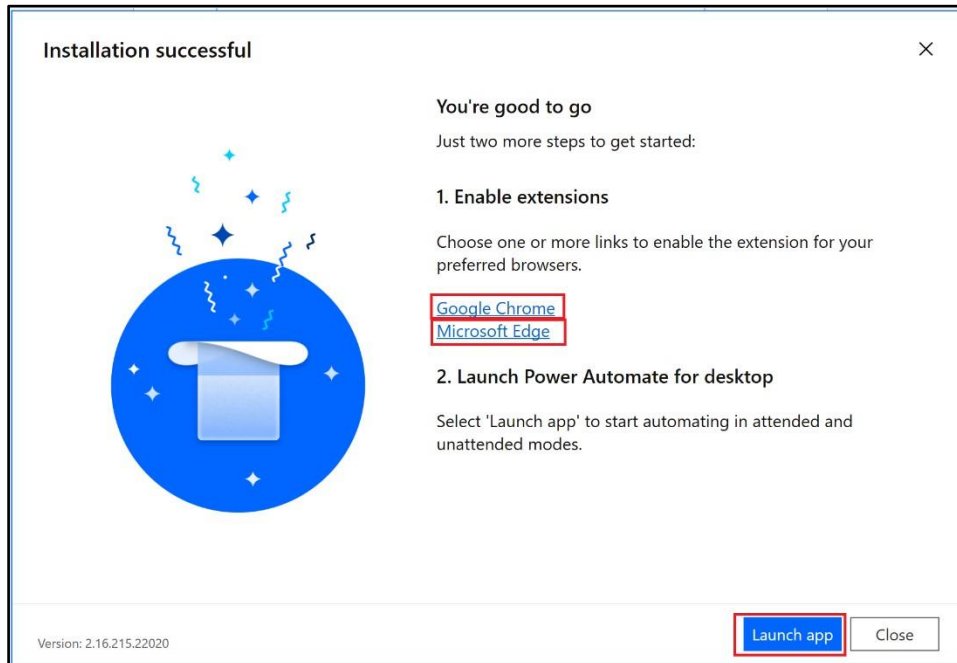
Install Power Automate for desktop application

1. **You need Power Automate desktop version 2.48 or higher.**

Download the latest version from this link: [Install Power Automate](#) and follow the instructions (from step 2) available in this web page: [Install Power Automate | Microsoft Learn](#)



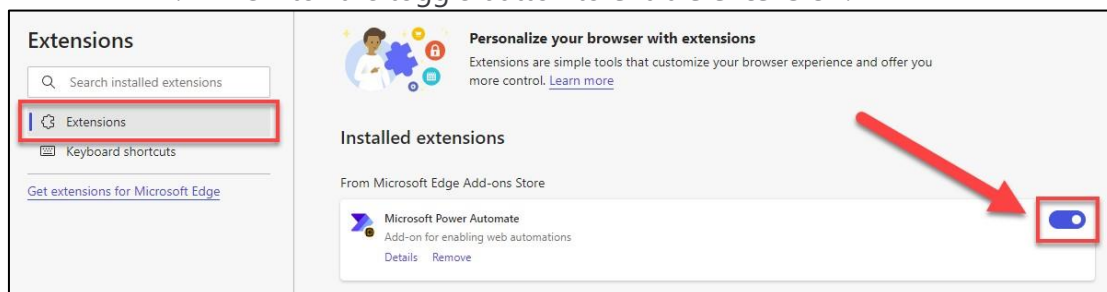
2. The installer will install on your computer the following components:
 - a. Power Automate for desktop app
 - b. Power Automate for desktop browser extension for Edge Chromium and Google Chrome
 - c. Power Automate machine-runtime management app
3. After the installation is finished, select the **hyperlinks (Google Chrome or Microsoft Edge)** in step 1 within the dialog box to navigate to a chosen browser(s) to enable **Power Automate for desktop extensions**. After your extensions have been configured, you can **launch Power Automate for desktop** in step 2 within the dialog box.



4. **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:

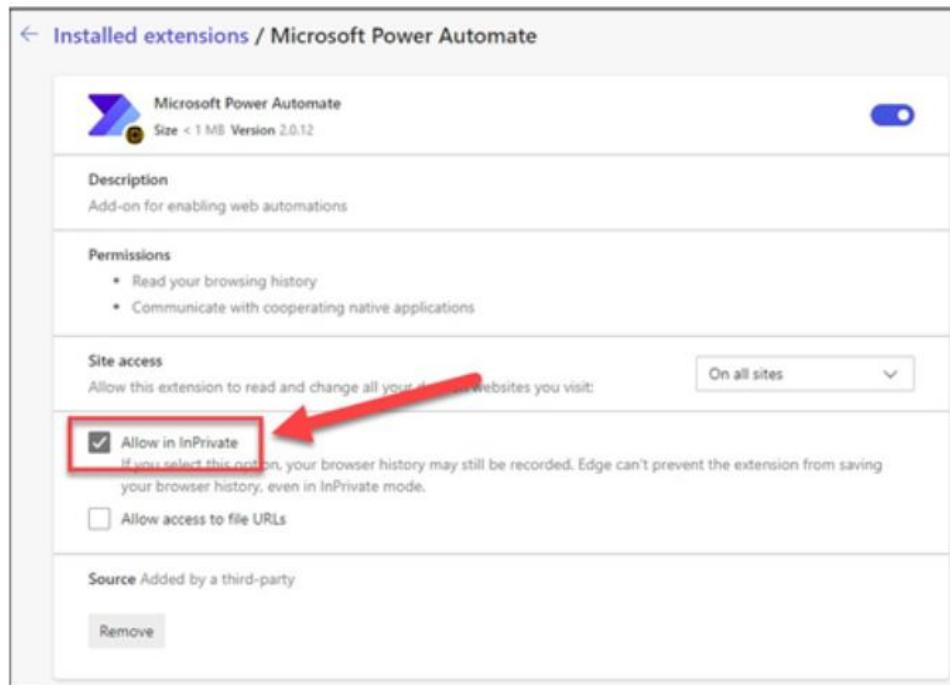
d. **Enable in Microsoft Edge (Chromium)**

- i. Open <edge://extensions> URL in the Edge (Chromium) browser
- ii. Find the **Microsoft Power Automate** extension.
- iii. Switch the toggle button to **enable extension**.

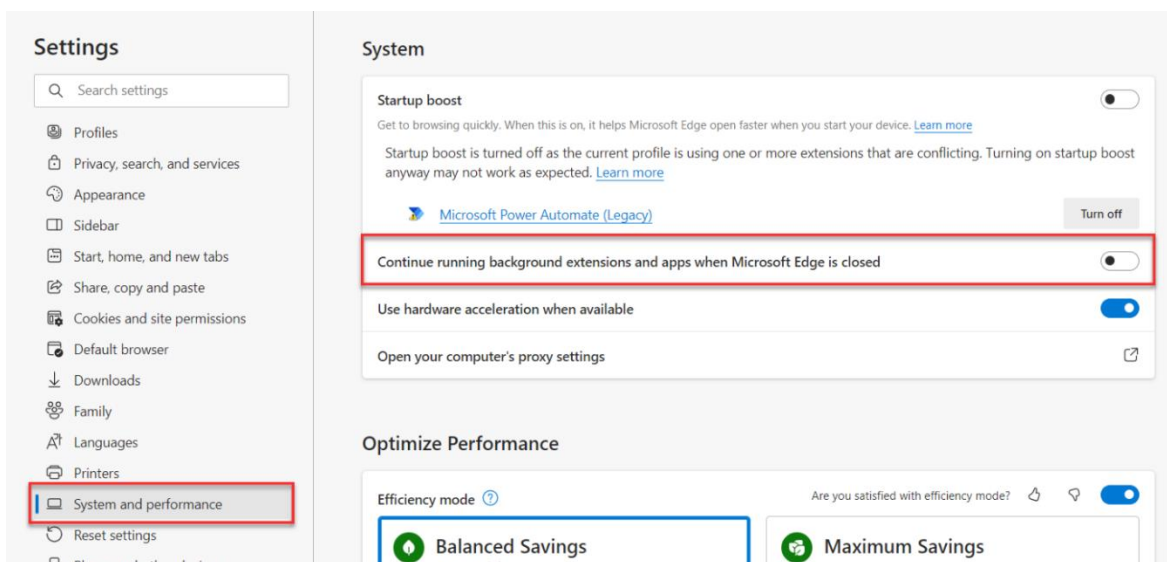


- iv. Select **Details**.

- v. Check the Allow **InPrivate** checkbox



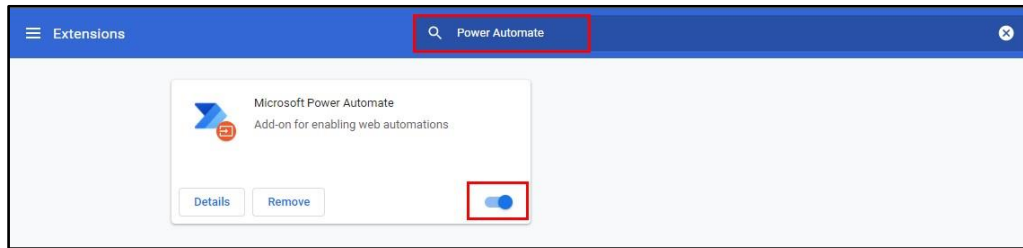
- vi. Open a new web browser and then open Microsoft Edge by going to `edge://settings/system`, which brings you to the **System and performance** page. Under the **System and performance** section, turn off the **Continue running background extensions and apps when Microsoft Edge is closed** toggle. Then, close all browser tabs and sessions before you proceed.



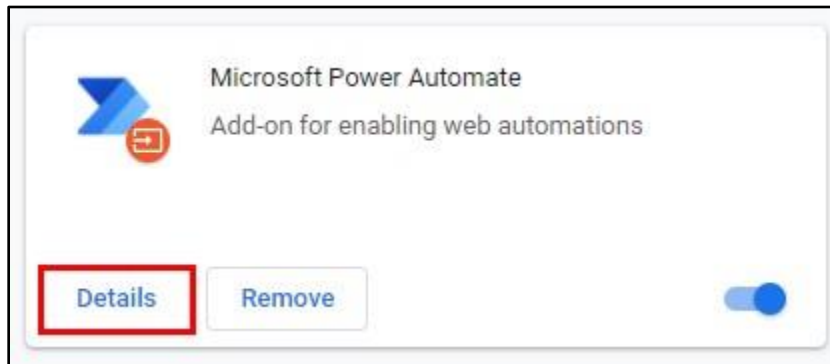
e. **Enable in Google Chrome**

- i. Open <chrome://extensions> URL in the Chrome browser.

Find the **Microsoft Power Automate** extension. iii. Switch the toggle button to **enable extension**.

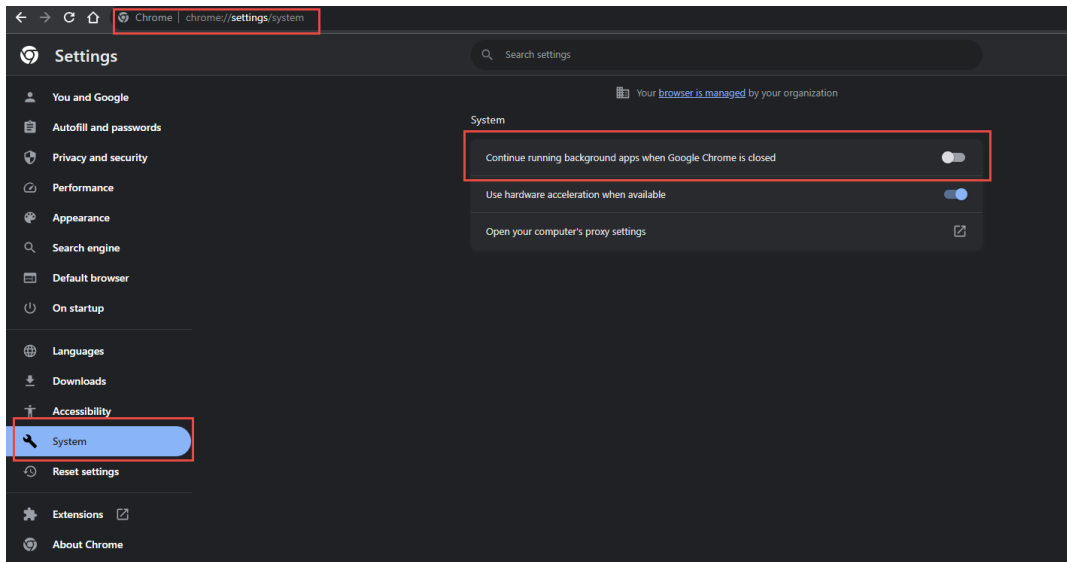


Select Details.

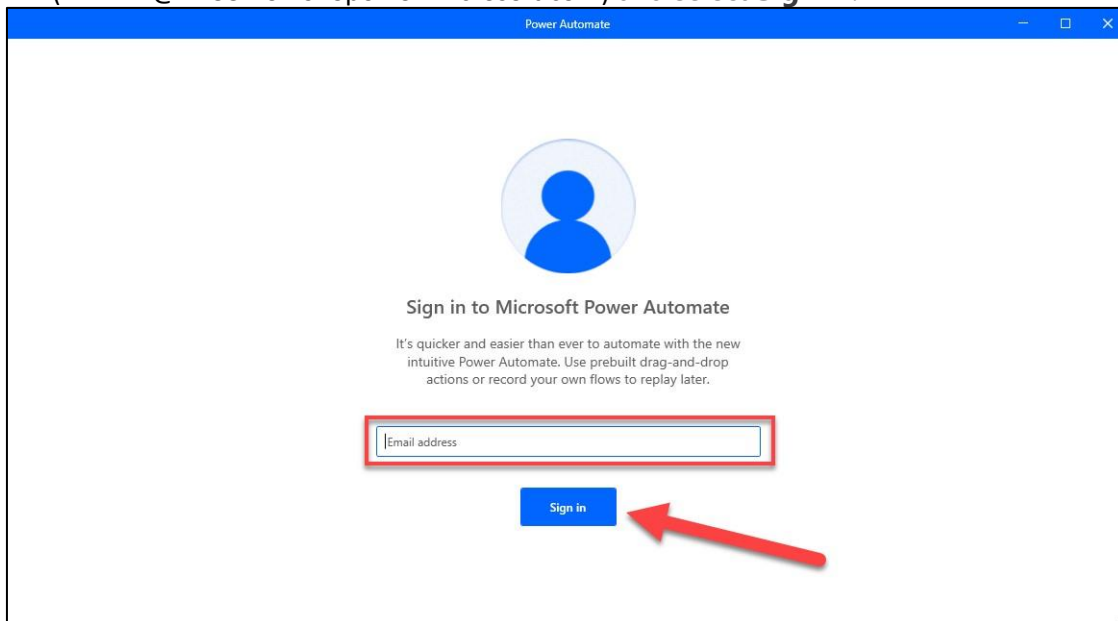


Switch the toggle button for **Allow in Incognito** to be on

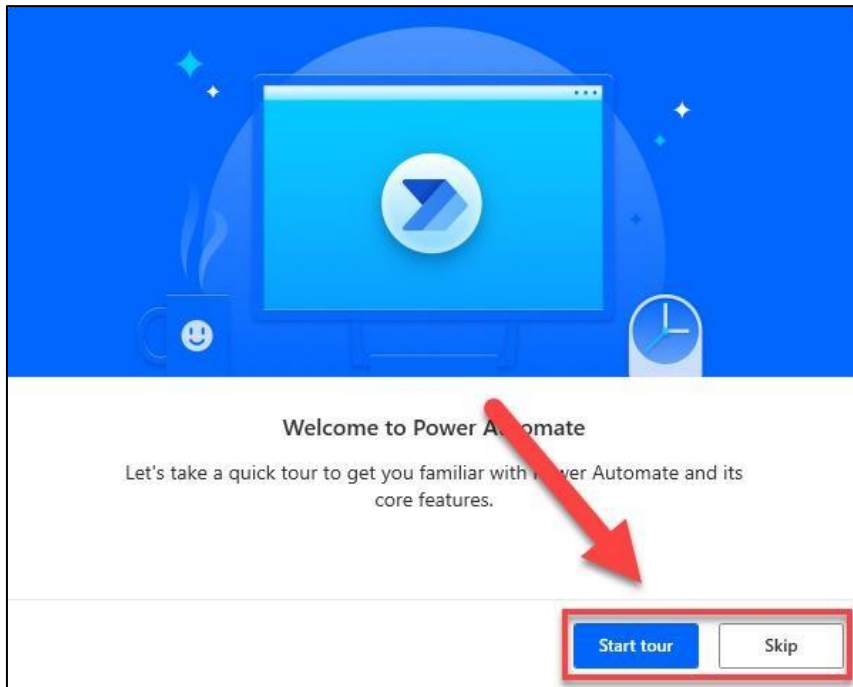
- ii. Open a new Chrome Browser by going to **chrome://settings/system**. Under the System section, turn off the **Continue running background apps when Google Chrome is closed** toggle. Then, close all browser tabs and sessions before you proceed.



5. Next, launch **Microsoft Power Automate** on your desktop (PAD). In the opened window, enter the email address of the account you are using for the labs (RPAXXX@PPCCWorkshop07.onmicrosoft.com) and select **Sign in**.



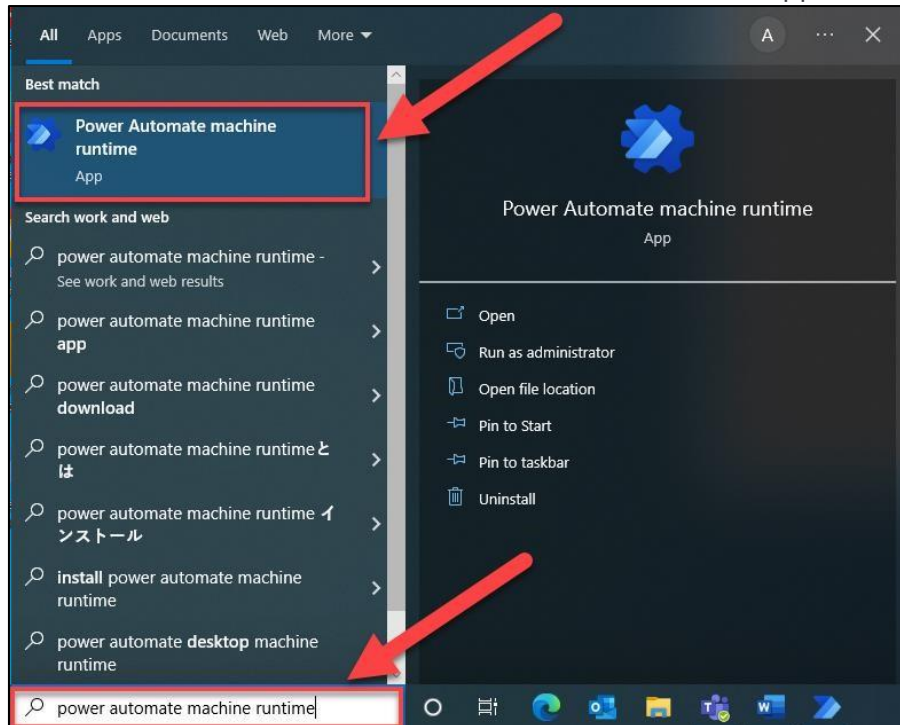
6. If you are logging into PAD for the first time, you might see the tour window. You can either **follow** the tour or **skip** the tour.



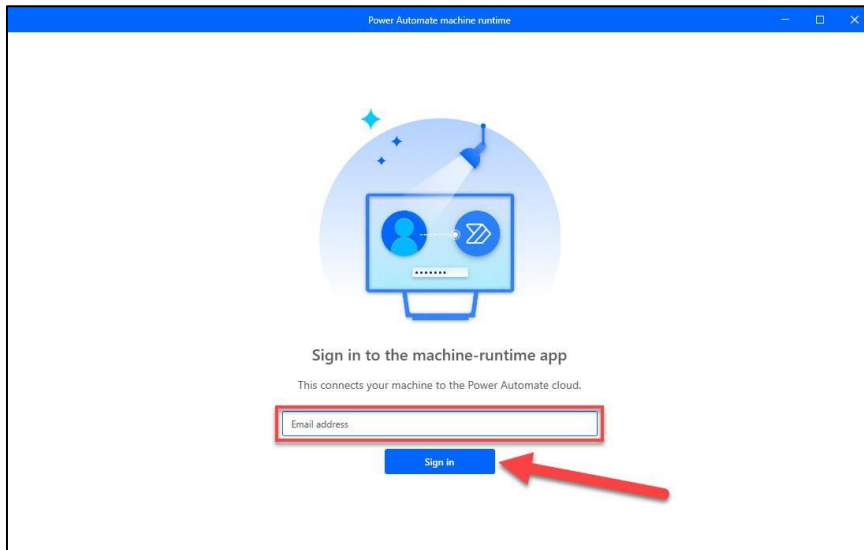
Register machine

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

7. Search for **Power Automate machine runtime** from the Windows search bar at the bottom of your desktop.
8. Select the **Power Automate machine runtime** app.

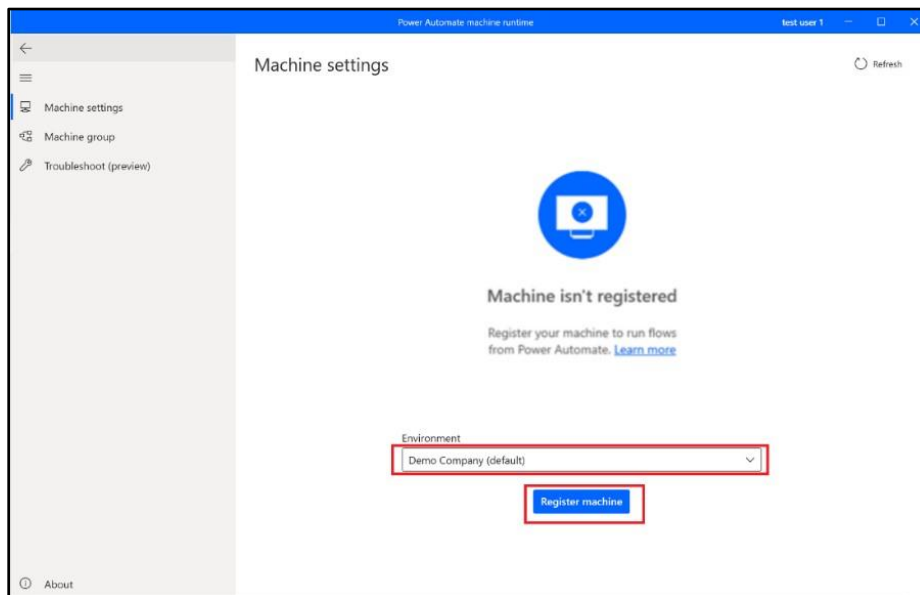


9. This will open the **Power Automate machine runtime** app. Please go ahead and **sign in** using the tenant account.



After logging in, you will see the screen below asking you to register your machine:

Note: If the machine has been auto registered for you, you will not see the screen below to register machine, instead you will see the screens in step #11. In that case, you can skip step #11.



10. You can select the **Register machine** button to register this machine to the default environment "**PPCCWorkshop07 (default)**". If you prefer doing this workshop using your own account and own environment/tenant, just select the environment where you want to register your machine.

Notes:

- Power Automate will only allow the cloud flows in the registered environment to trigger desktop flows to run on this machine.
- Please make sure to use environments where Copilot is enabled otherwise you may not be able to do all the labs.

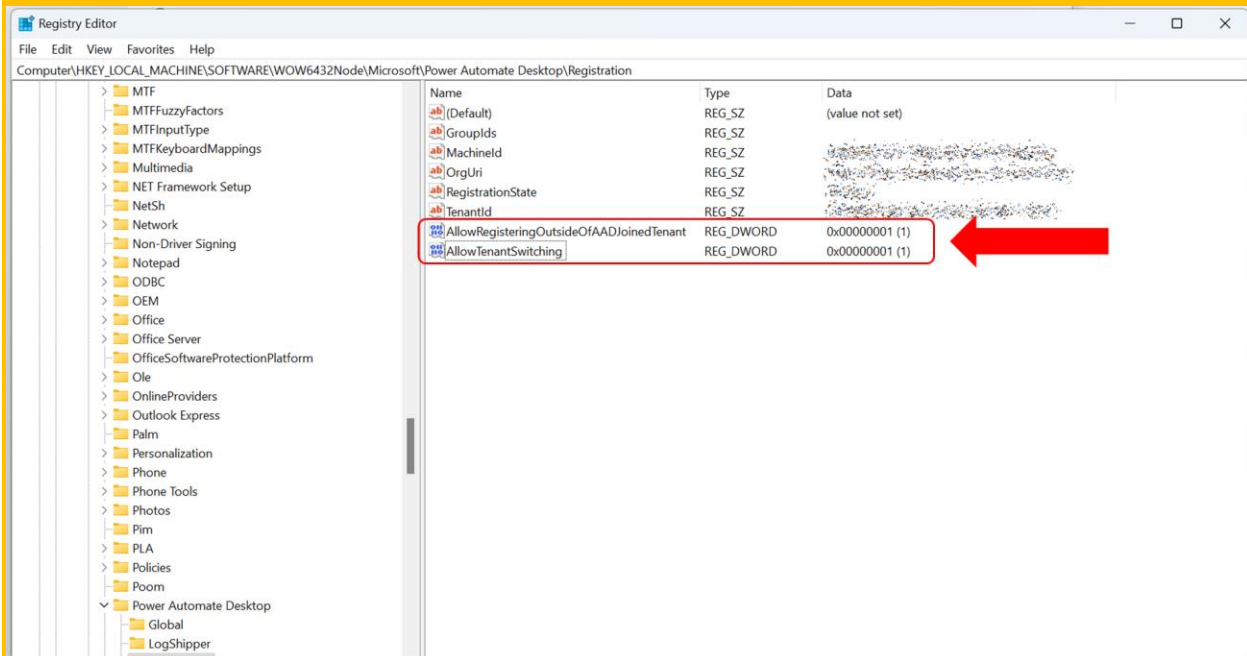
Note: If you cannot successfully register your machine to the demo tenant, you may need to allow your machine to register to a different tenant than the one it belongs to.

You will need to open regedit and add the 2 following registry values under:

Computer\HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Microsoft\Power Automate Desktop\Registration

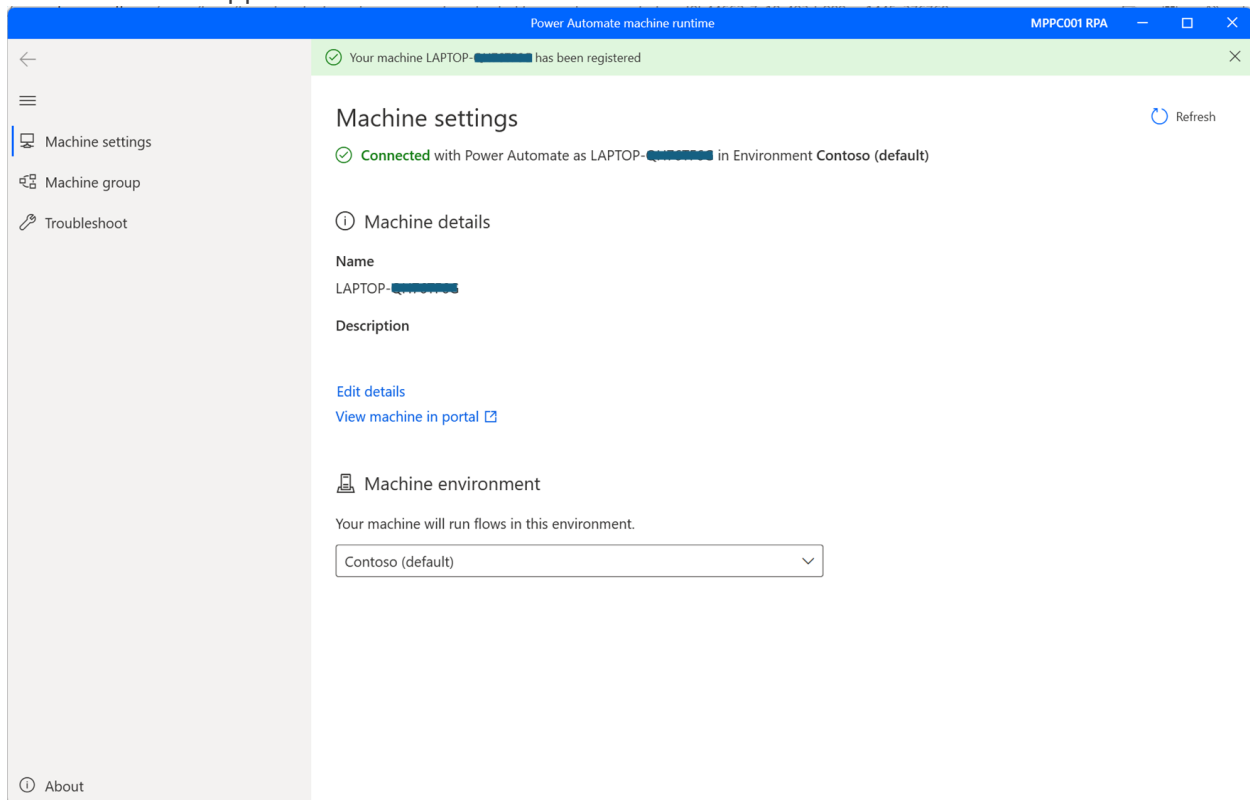
- Create a new DWORD value (Edit > new > DWORD (32 bit) value) named **AllowRegisteringOutsideOfAADJoinedTenant** and set it to **1**
- Create a new DWORD value (Edit > new > DWORD (32 bit) value) named **AllowTenantSwitching** and set it to **1**

It should look like this:



More information is available here: [Tenant restrictions for Power Automate desktop machine registration - Microsoft Support](#)

11. After registering successfully, you will see this information in the machine runtime app:



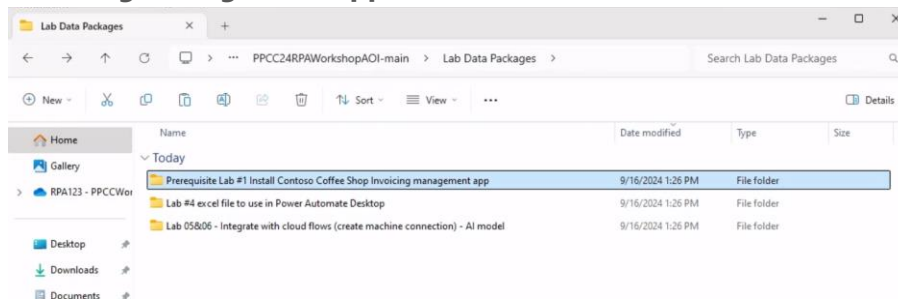
12. In the future, you can also use the **Machine group** settings to add more machines to one machine group and manage them together. You can learn more information about machine groups here: [Manage machine groups](#)

Note: Users will need either an Environment Maker or desktop Flow Machine Owner role permission 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 in.

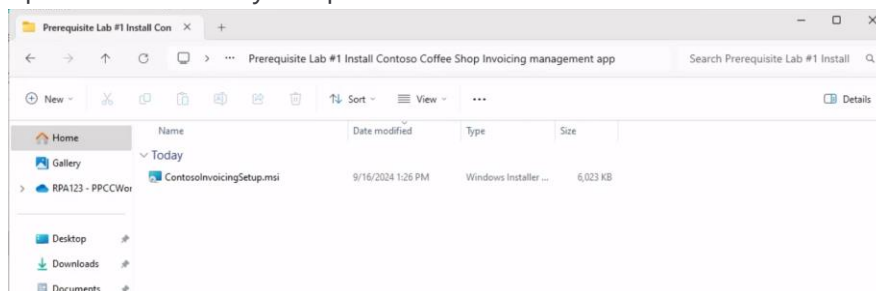
Install the Coffee Shop Contoso Invoice App (for lab scenario use)

1. In the lab, we will be using a Coffee shop company business scenario to see how we can automate their manual invoice processing steps using Power Automate desktop flow and cloud flows. This Coffee shop company is using a Win32 Windows application to manually manage their invoice system. First, let's **download** and **install** this application to prepare for the lab.
2. Go to the folder where you extracted the workshop zip file and locate the folder named "Lab Data Packages".
Example: "C:\Users\<username>\Downloads\PPCC24RPAWorkshopAOI-main\PPCC24RPAWorkshopAOI-main\Lab Data Packages".

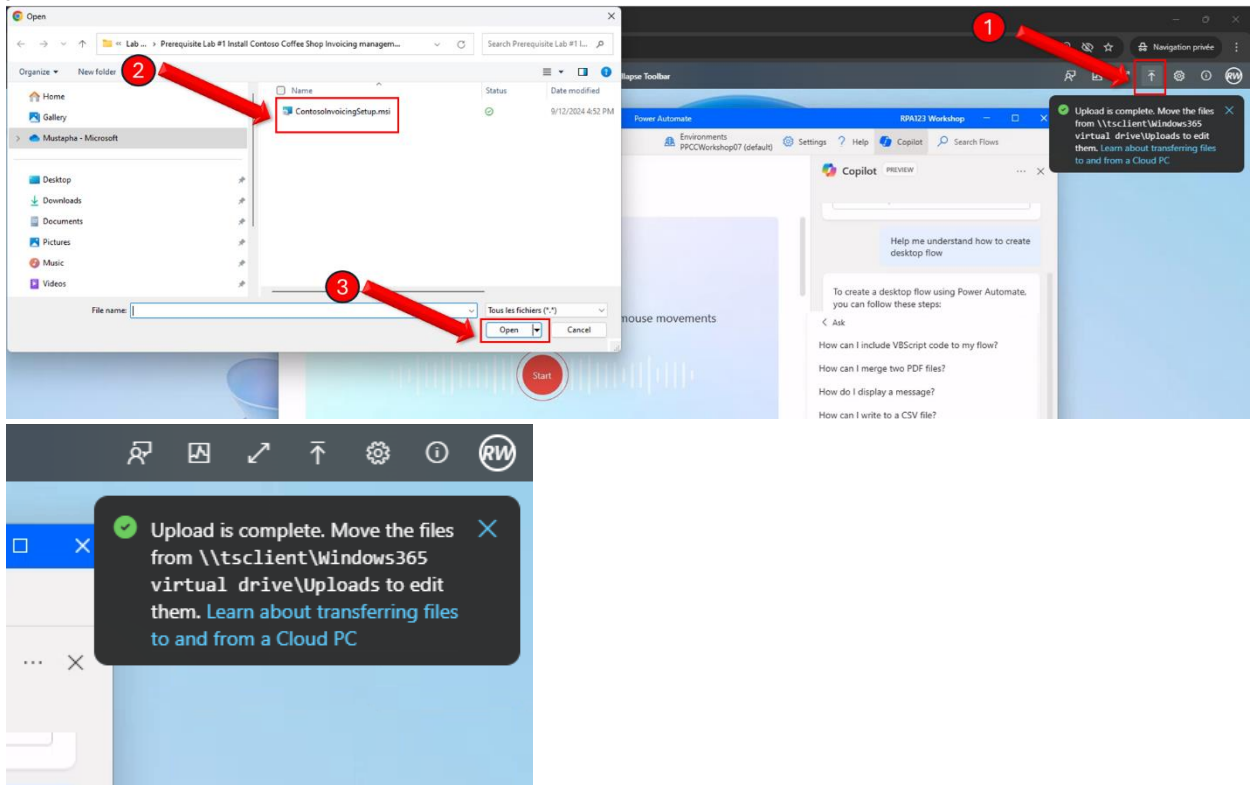
3. Then open the folder named "**Prerequisite Lab #1 Install Contoso Coffee Shop Invoicing management app**":



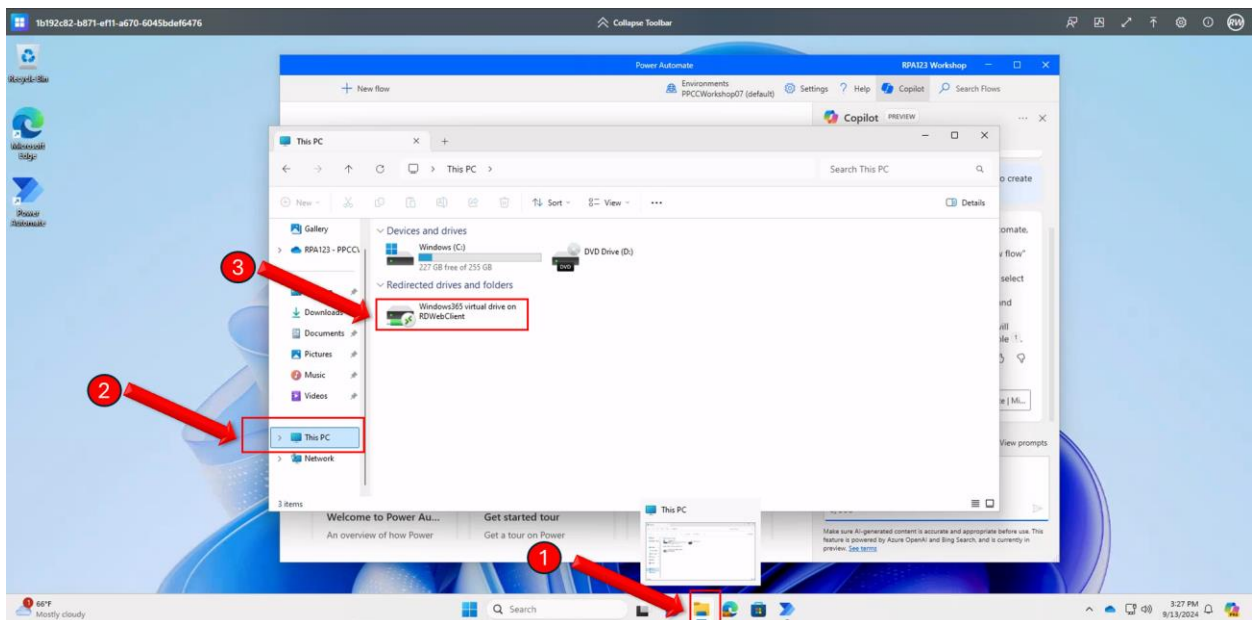
4. **ContosoInvoicingSetup.msi** is the file we need to upload to the hosted machine. You can indeed download from and upload files to your hosted machine. We will use the upload functionality to upload the installation file to it.



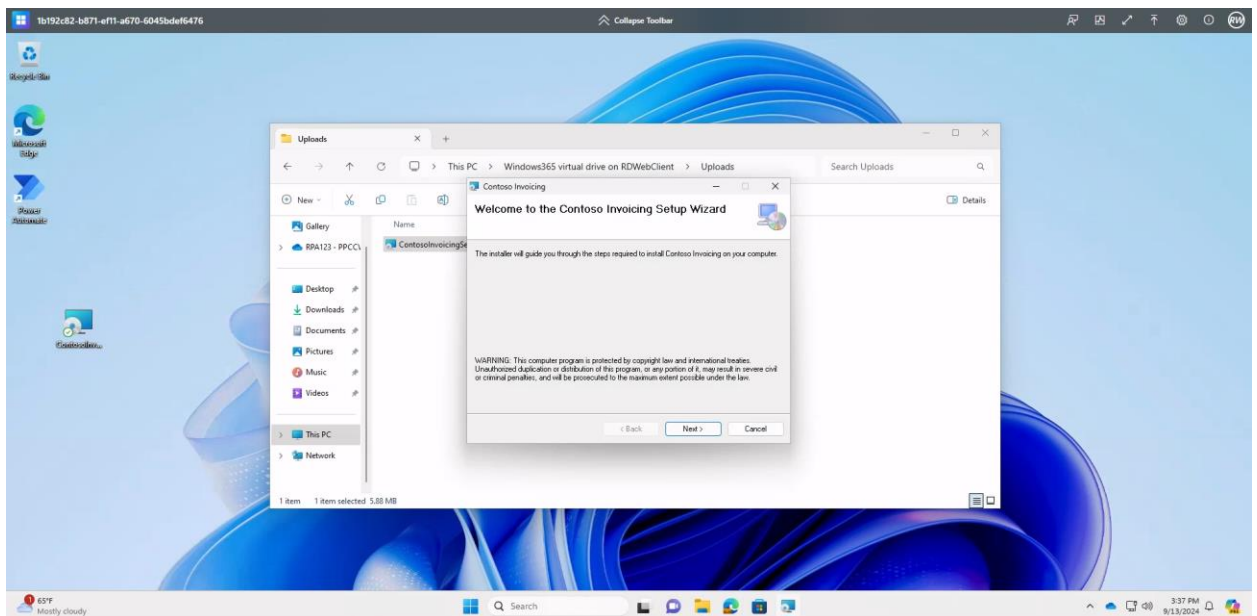
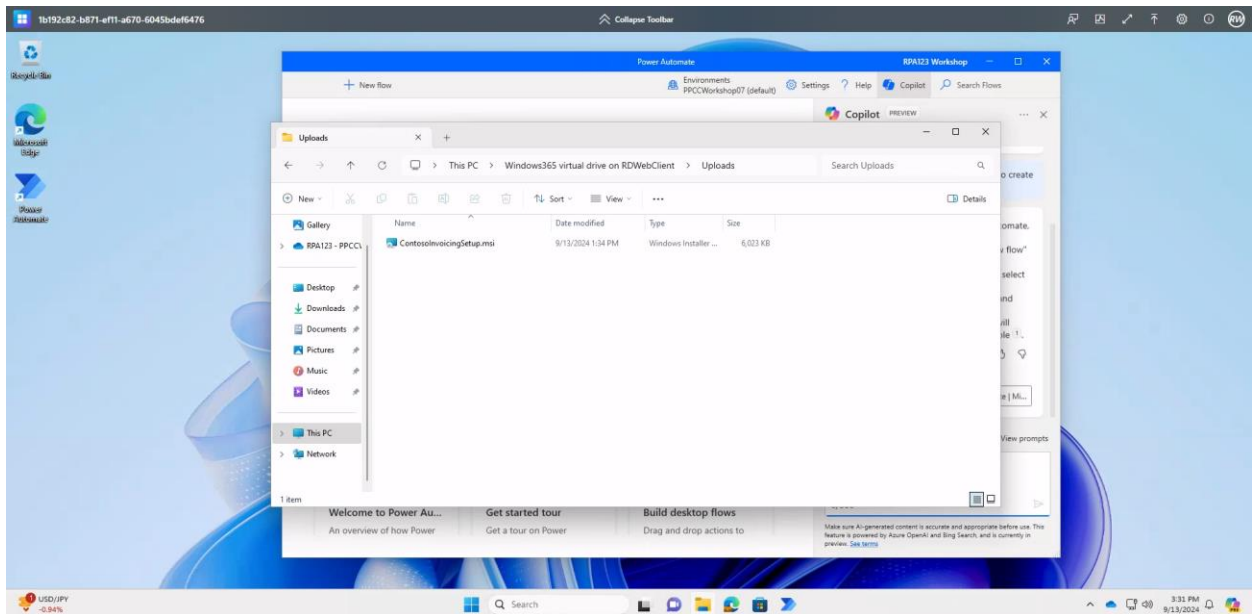
5. Go to your hosted machine tab on your web browser, then click on the **Upload** button located at the top right corner of the screen, then navigate to the folder where you downloaded the msi file, select it and click on **Open**:



6. Once uploaded, go to **File explorer**, then select **This PC**, and double-click on “**Windows 365 virtual drive on RDWebClient**”:

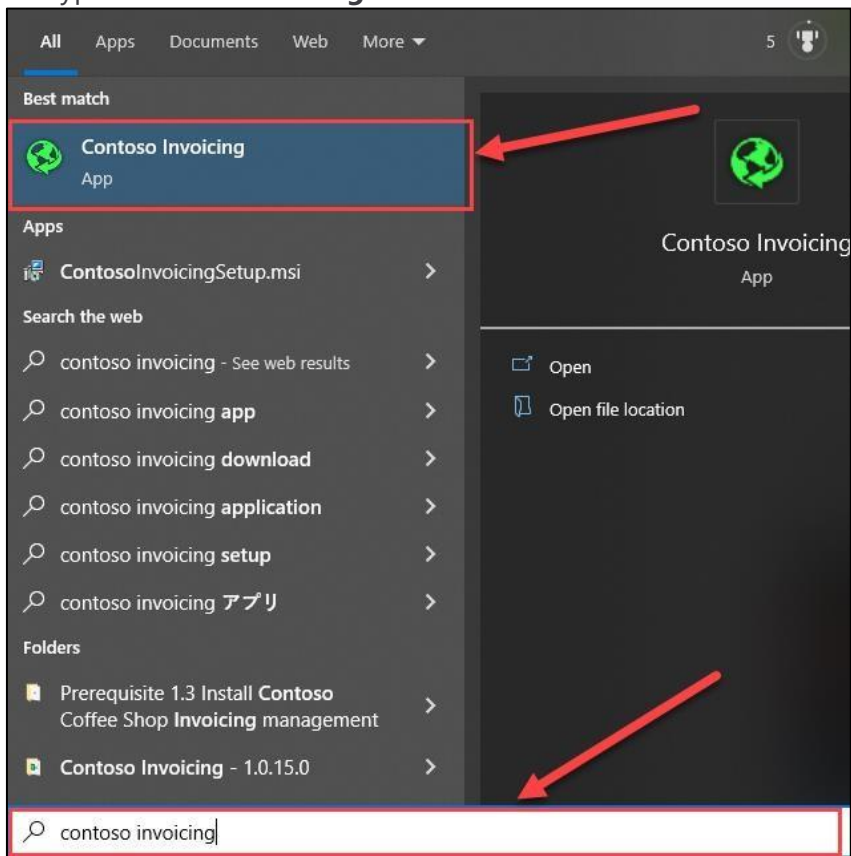


7. Open the **Uploads** folder and then drag and drop the "**ContosoInvoicingSetup.msi**" file to your hosted machine desktop. You can now close the File explorer and launch the application installation by double clicking on the msi file.

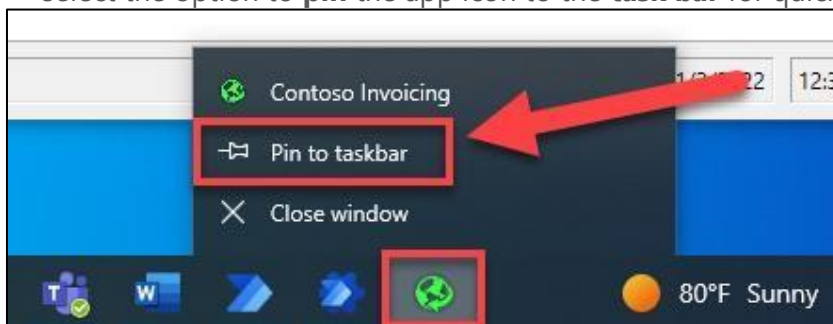


Note: You will need to select **More Information** and **Run it anyway** during the installation of the Contoso app if Windows Defender prompts that the app is coming from an untrusted source.

8. After the installation is fully completed, launch the **Contoso Invoicing app** from the Start menu using the search bar at the bottom of your desktop. Within the search bar, type **Contoso Invoicing**.

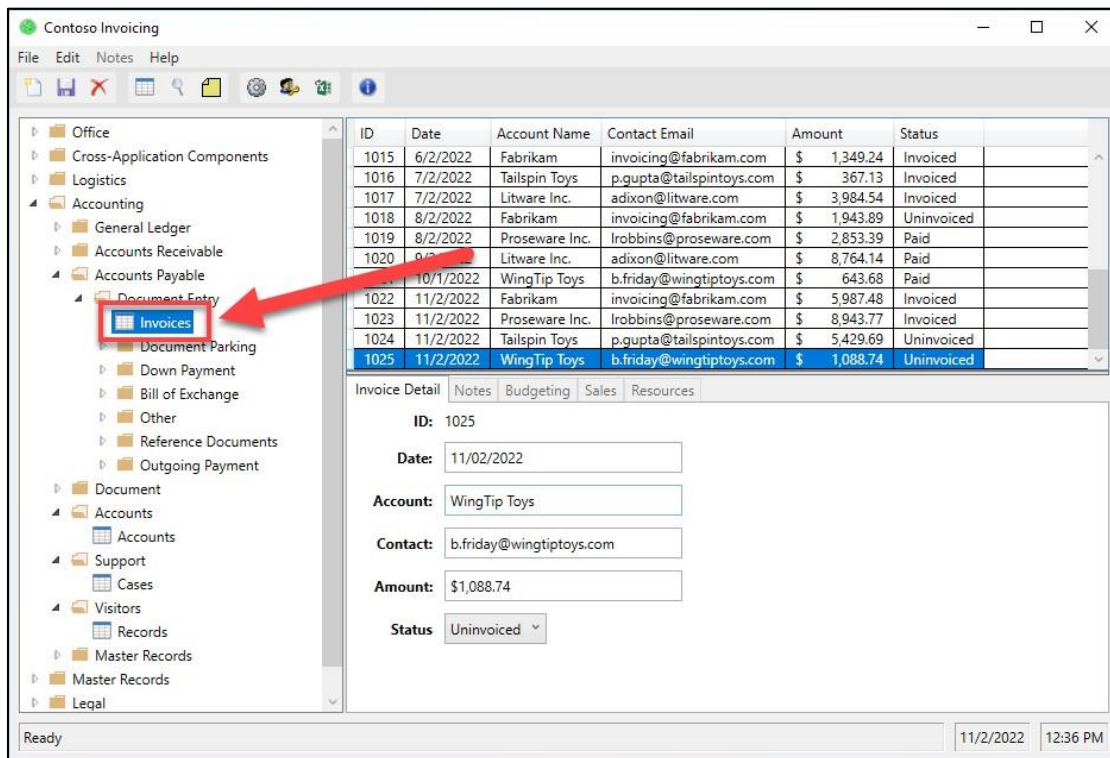


9. Right-click on the app icon located in the task bar at the bottom of your desktop and select the option to **pin** the app icon to the **task bar** for quick launch.

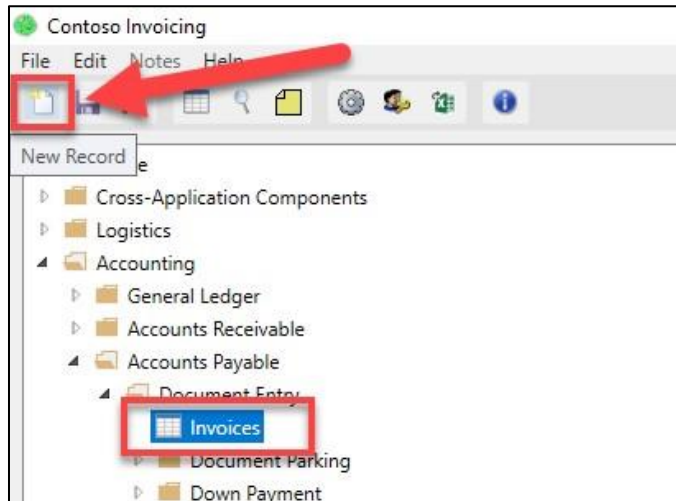


10. Now, let's spend some time getting familiar with the Contoso Invoicing App. We will look into how the Contoso Coffee shop employee usually manually enters a new invoice record into the company application system when there is a new invoice being received. This will help you better prepare for the following lab exercises

- i) With the **Contoso Invoicing App** open, select **Invoices** from the pane to the left of the screen.



- ii) Select the **New record icon** button from the ribbon at the top left corner of the screen to create a new invoice.



- iii) You can **fill in any information** for the new invoice in the text boxes that appear in the center of the screen

For this example, we input the following information:

Date: (current date)

Account: Admin Account

Contact: (email we used to login to the accounts)

Amount: \$100.00

Status: Paid

Contoso Invoicing

File Edit Notes Help

Office
Cross-Application Components
Logistics
Accounting
General Ledger
Accounts Receivable
Accounts Payable
Document Entry
Invoices*
Document Parking
Down Payment
Bill of Exchange
Other
Reference Documents
Outgoing Payment
Document
Accounts
Support
Cases
Visitors
Records
Master Records
Legal
Reference Documents

ID	Date	Account Name	Contact Email	Amount	Status
1014	5/3/2022	Proseware Inc.	lrobbins@proseware.com	\$ 843.76	Invoiced
1015	6/2/2022	Fabrikam	invoicing@fabrikam.com	\$ 1,349.24	Invoiced
1016	7/2/2022	Tailspin Toys	p.gupta@tailspintoys.com	\$ 367.13	Invoiced
1017	7/2/2022	Litware Inc.	adixon@litware.com	\$ 3,984.54	Invoiced
1018	8/2/2022	Fabrikam	invoicing@fabrikam.com	\$ 1,943.89	Uninvoiced
1019	8/2/2022	Proseware Inc.	lrobbins@proseware.com	\$ 2,853.39	Paid
1020	9/2/2022	Litware Inc.	adixon@litware.com	\$ 8,764.14	Paid
1021	10/1/2022	WingTip Toys	b.friday@wingtip toys.com	\$ 643.68	Paid
1022	11/2/2022	Fabrikam	invoicing@fabrikam.com	\$ 5,987.48	Invoiced
1023	11/2/2022	Proseware Inc.	lrobbins@proseware.com	\$ 8,943.77	Invoiced
1024	11/2/2022	Tailspin Toys	p.gupta@tailspintoys.com	\$ 5,429.69	Uninvoiced
1025	11/2/2022	WingTip Toys	b.friday@wingtip toys.com	\$ 1,088.74	Uninvoiced
1026	11/2/2022	Admin Account	labadmin1@m365x44459415.onmicrosoft.com	\$ 100.00	Paid

Invoice Detail | Notes | Budgeting | Sales | Resources

ID: 1026

Date: 11/02/2022

Account: Admin Account

Contact: @m365x44459415.onmicrosoft.com

Amount: \$100.00

Status: Paid

- iv) Select the **Save** icon button from the ribbon at the top left corner of the screen to save your new invoice

Contoso Invoicing

File Edit Notes Help

Office Cross-Application Components Logistics Accounting General Ledger Accounts Receivable Accounts Payable Document Entry Invoices* Document Parking Down Payment Bill of Exchange Other Reference Documents Outgoing Payment Document Accounts Support Visitors Records Master Records Legal Reference Documents

ID	Date	Account Name	Contact Email	Amount	Status
1014	5/3/2022	Proseware Inc.	lrobbins@proseware.com	\$ 843.76	Invoiced
1015	6/2/2022	Fabrikam	invoicing@fabrikam.com	\$ 1,349.24	Invoiced
1016	7/2/2022	Tailspin Toys	p.gupta@tailspintoys.com	\$ 367.13	Invoiced
1017	7/2/2022	Litware Inc.	adixon@litware.com	\$ 3,984.54	Invoiced
1018	8/2/2022	Fabrikam	invoicing@fabrikam.com	\$ 1,943.89	Uninvoiced
1019	8/2/2022	Proseware Inc.	lrobbins@proseware.com	\$ 2,853.39	Paid
1020	9/2/2022	Litware Inc.	adixon@litware.com	\$ 8,764.14	Paid
1021	10/1/2022	WingTip Toys	b.friday@wingtiptoy.com	\$ 643.68	Paid
1022	11/2/2022	Fabrikam	invoicing@fabrikam.com	\$ 5,987.48	Invoiced
1023	11/2/2022	Proseware Inc.	lrobbins@proseware.com	\$ 8,943.77	Invoiced
1024	11/2/2022	Tailspin Toys	p.gupta@tailspintoys.com	\$ 5,429.69	Uninvoiced
1025	11/2/2022	WingTip Toys	b.friday@wingtiptoy.com	\$ 1,088.74	Uninvoiced
1026	11/2/2022	Admin Account	labadmin1@m365x44459415.onmicrosoft.com	\$ 100.00	Paid

Invoice Detail Notes Budgeting Sales Resources

ID: 1026

Date: 11/02/2022

Account: Admin Account

Contact: @m365x44459415.onmicrosoft.com

Amount: \$100.00

Status: Paid

Congratulations! Now you have completed all the pre-requisites and understand how an invoice record is manually processed by the Contoso Coffee shop employee. You are now ready for the labs to automate the whole process using Power Automate.

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