

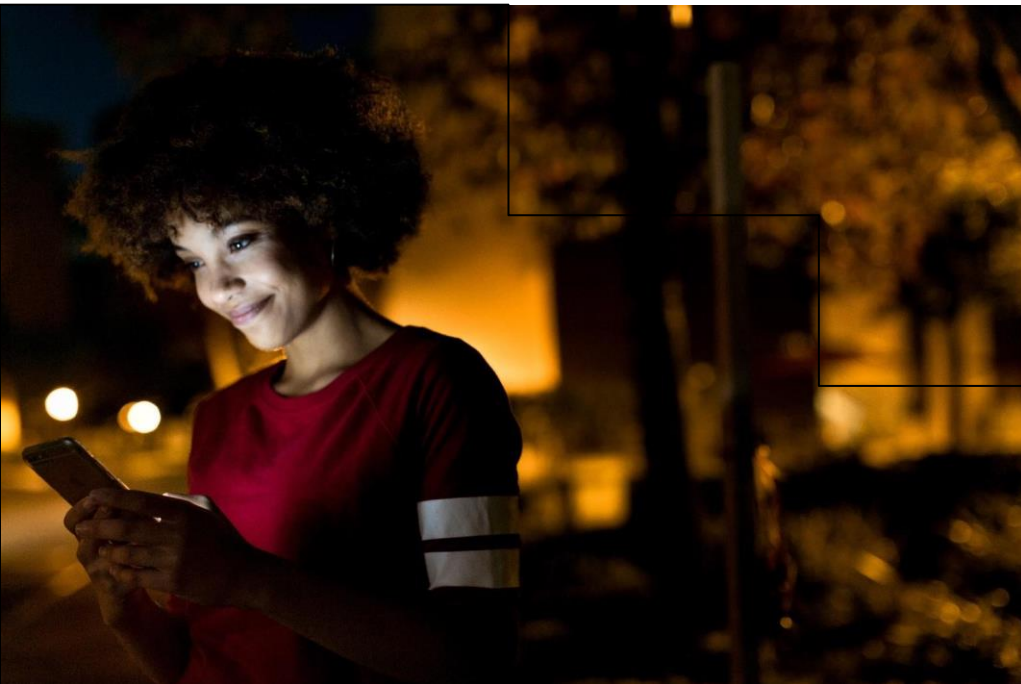


Redefined in the Age of AI: Power Automate Desktop (PPCC24)

Lab 2 – Create your first desktop flow

30 mins

September 2024



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Lab Overview

In the previous prerequisites lab you have gained insights and identified the bottleneck steps of the manual invoice processing procedure in the Contoso Coffee shop company. Now you are ready to use Power Automate desktop flows to start automating some of the processes to increase productivity and efficiency. You will complete the following tasks in this lab:

- Getting familiar with Power Automate desktop flows.
- Learn more about Power Automate features interacting with Copilot in natural language.
- Create a new desktop flow.
- Record actions performed in the desktop-installed Contoso Invoicing application
- Perform a test run of the new desktop flow
- **[Optional]** Create a new desktop flow with the new feature **AI Recorder**.

Prerequisites

This lab builds on the initial setup lab (Lab 1) – ensure all tasks are complete.

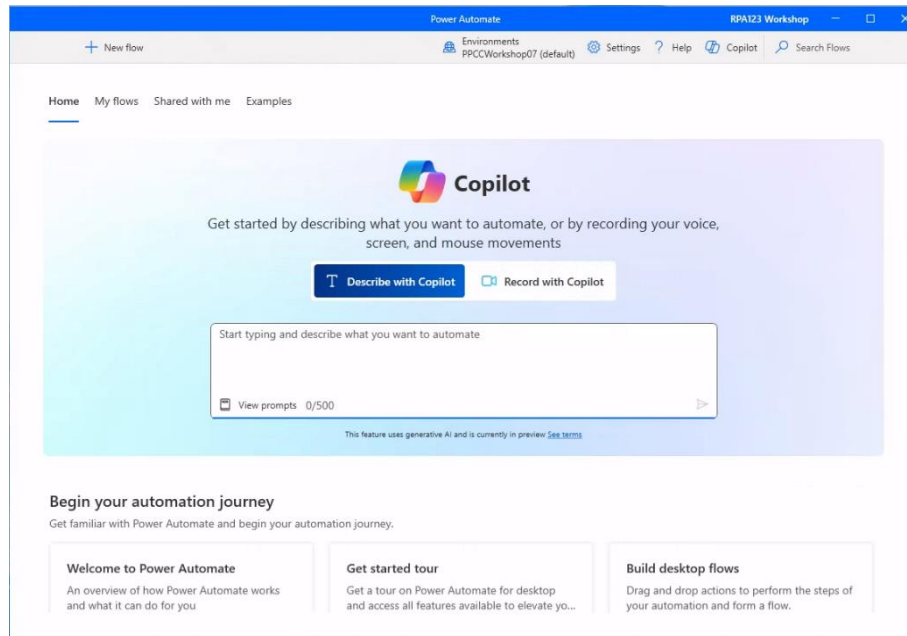
Important Additional Prerequisite: As you will be recording actions performed in your UI in this lab, **the best experience is if you view the lab instructions on a separate device or in a printout**. You can still complete the lab while using the instructions during UI action recording, but you will have to perform extra work to cut the recorded actions of viewing the instructions from the desktop flow.

Also please check the known OS requirements and limitations here for desktop flows
<https://learn.microsoft.com/en-us/power-automate/desktop-flows/setup>

Getting Familiar with Power Automate for desktop

Note: Please complete Lab 1 Prerequisite - Install required software the latest version of Power Automate for desktop.

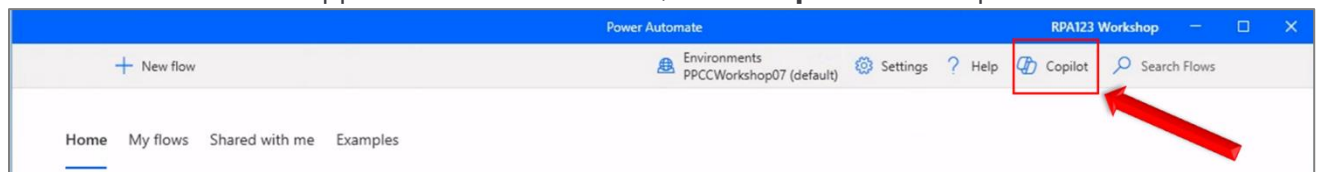
1. Let's first get familiar with the Power Automate for desktop app. Launch the Power Automate for desktop app from your computer and sign into your account.



2. Select the **Environments** drop-down, located at the top of the page, make sure your environment is the appropriate one (**PPCCWorkshop07 (Default)**).



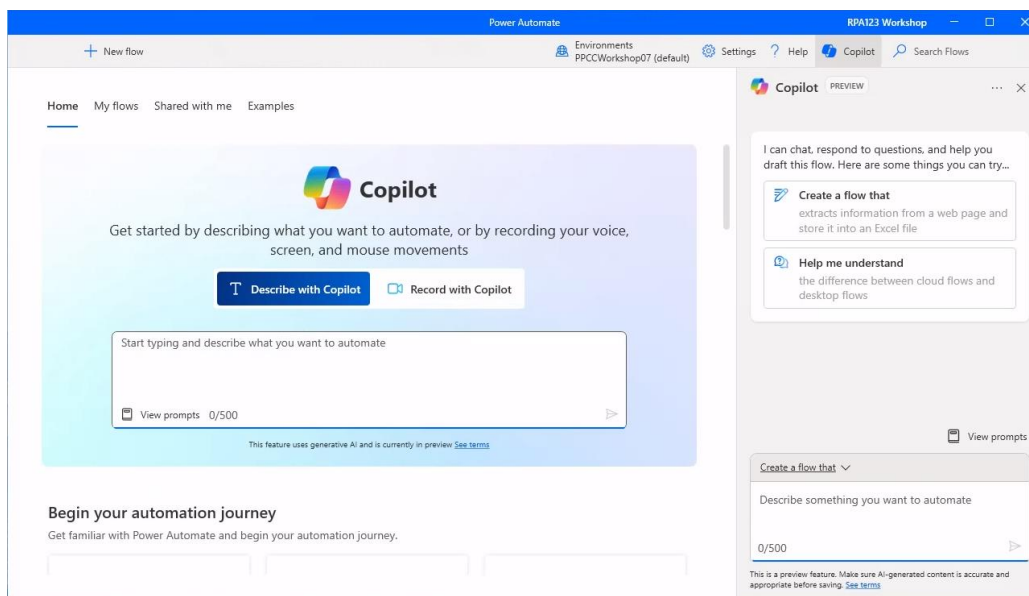
3. Instead of opening the official Power Automate documentation in a browser while discovering the Power Automate for Desktop application. We've included your digital assistant inside the application. Let's discover it, select **Copilot** in the top bar:



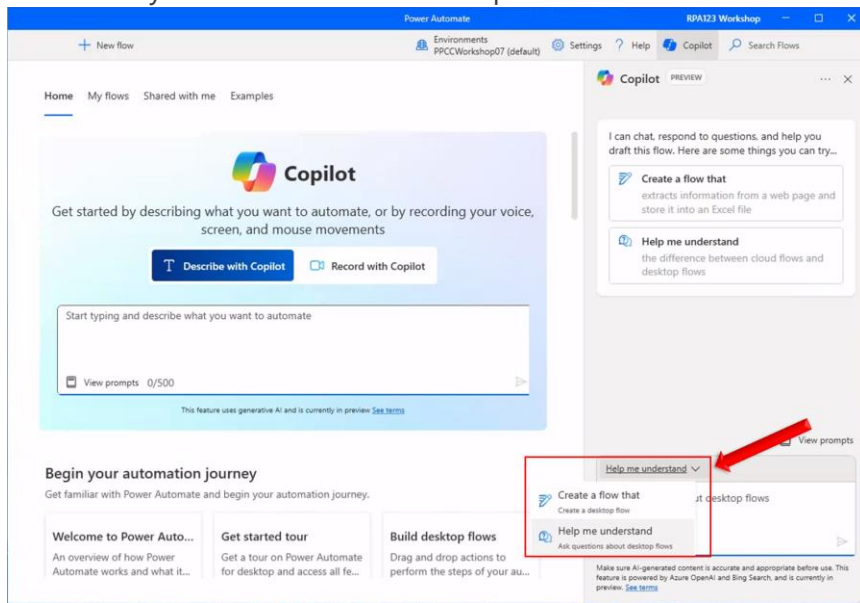
The Copilot pane opens on the right side of the window. This experience provides two main features:

- **“Help me understand”**: Get support on how to use or get information about a specific feature across all Power Automate.
- **“Create a flow that”**: Get help building a desktop flow using natural language.

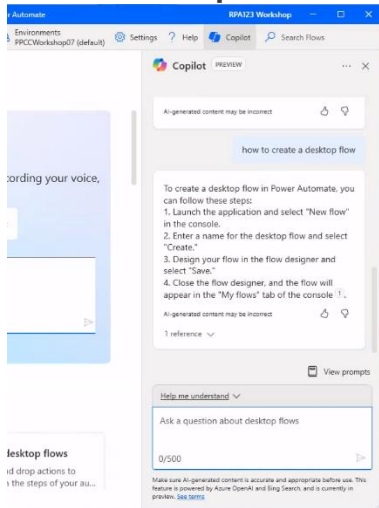
Let's try “Help me understand”. Copilot is connected to Power Automate knowledge base and documentation. You can ask any questions related to Power Automate and it will provide accurate answers with links to the resources to learn more.



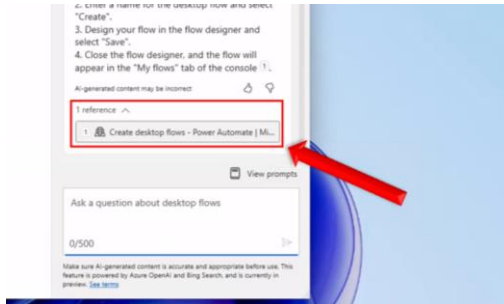
4. Make sure you have selected the "Help me understand" skill:



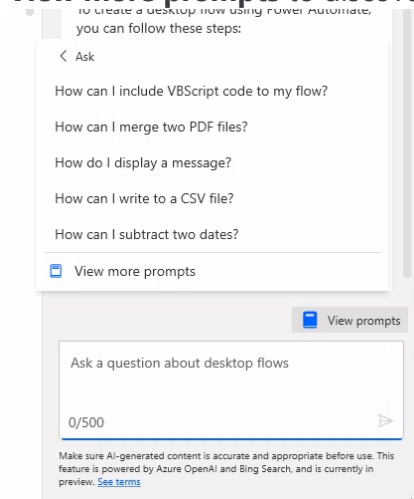
5. Now let's ask Copilot how to create a desktop flow, you can use a prompt like **"how to create a desktop flow"** and wait for Copilot's answer:



6. Note the reference link available at the bottom, click on it to open the documentation page:

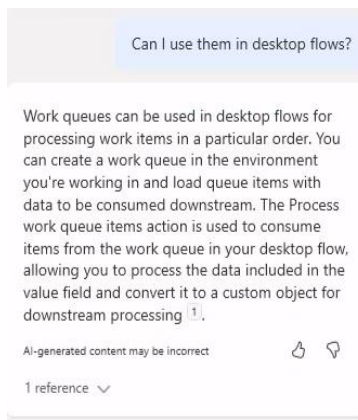
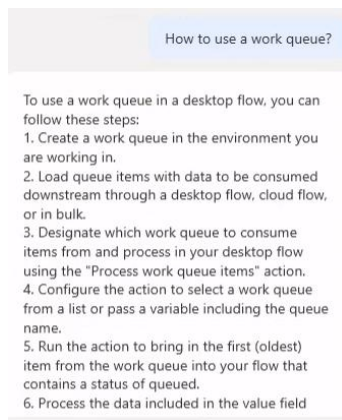


7. Close the web browser and go back to Power Automate for Desktop. You can see other prompt examples to help you better interact with Copilot, click on **View prompts**, then **View more prompts** to discover them.

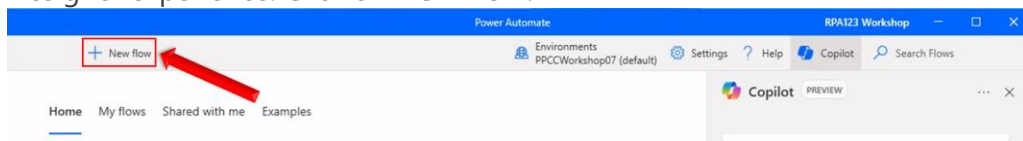


8. Copilot can keep up a conversation with you. The multi-turn feature allows Copilot to consider previous questions to answer the last one. Let's try it with the 2 following questions:

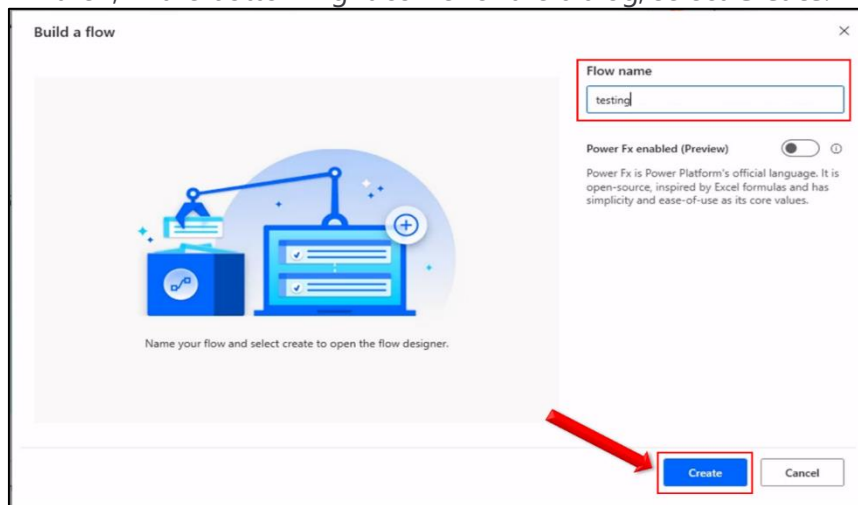
1. **"How to use a work queue?"**
2. **"Can I use them in desktop flows?"**



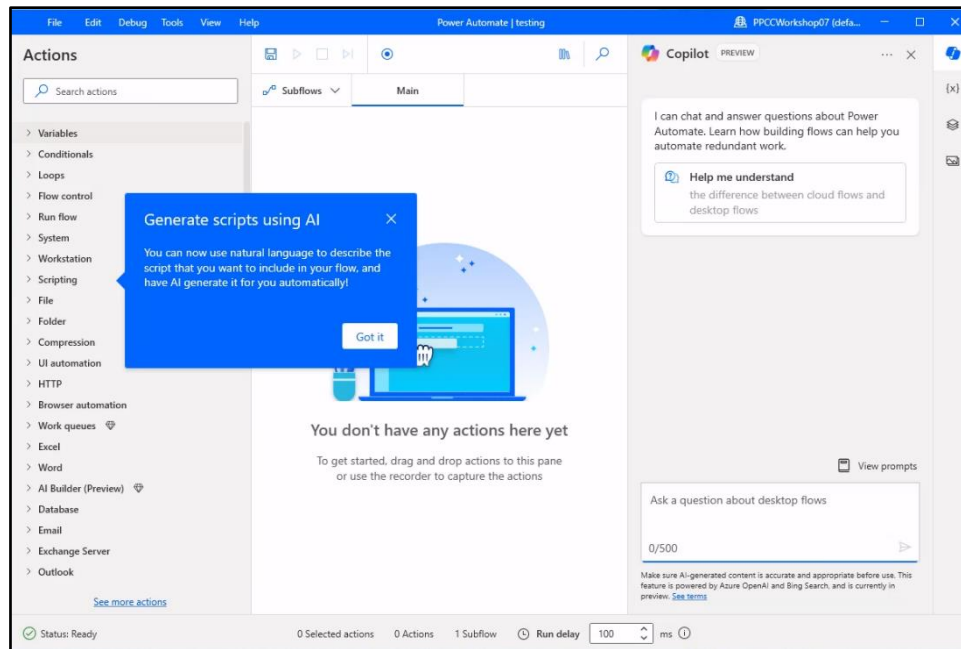
9. Now that you've gotten familiar with the Console-based Copilot, we can look into the Designer experience. Click on **New flow**.



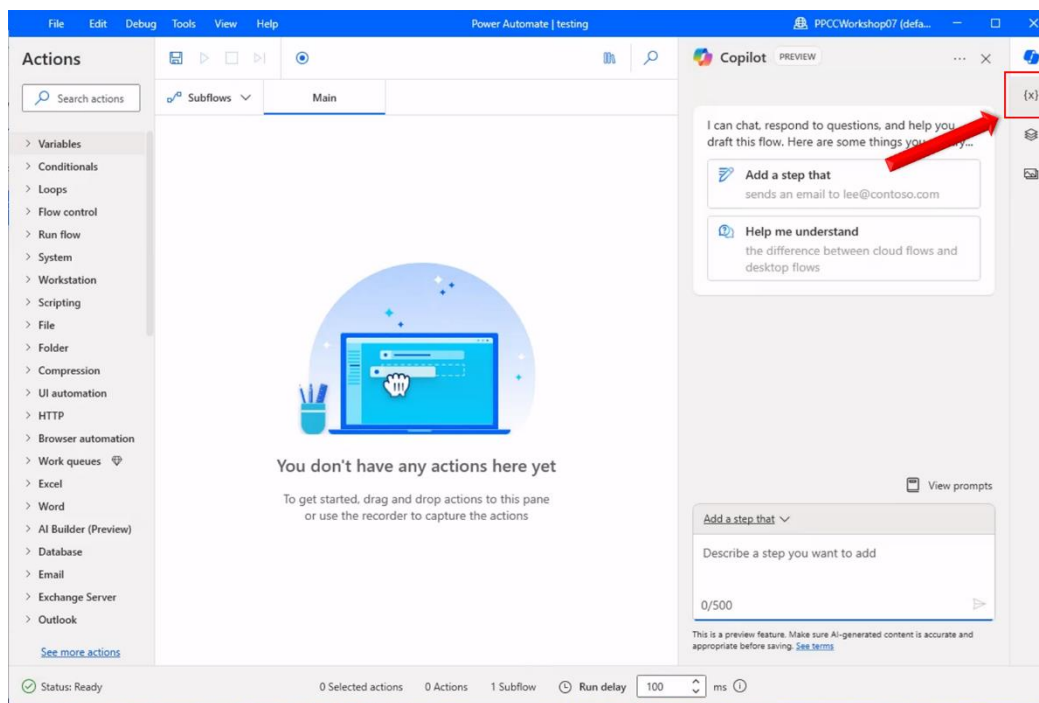
10. Within the Build a flow dialog window, to the right, name the new flow **testing** and then, in the bottom right corner of the dialog, select **Create**.



11. A new window has opened, this is the Power Automate for desktop designer. You might be seeing a tour box showcasing new features recently released, you may skip.

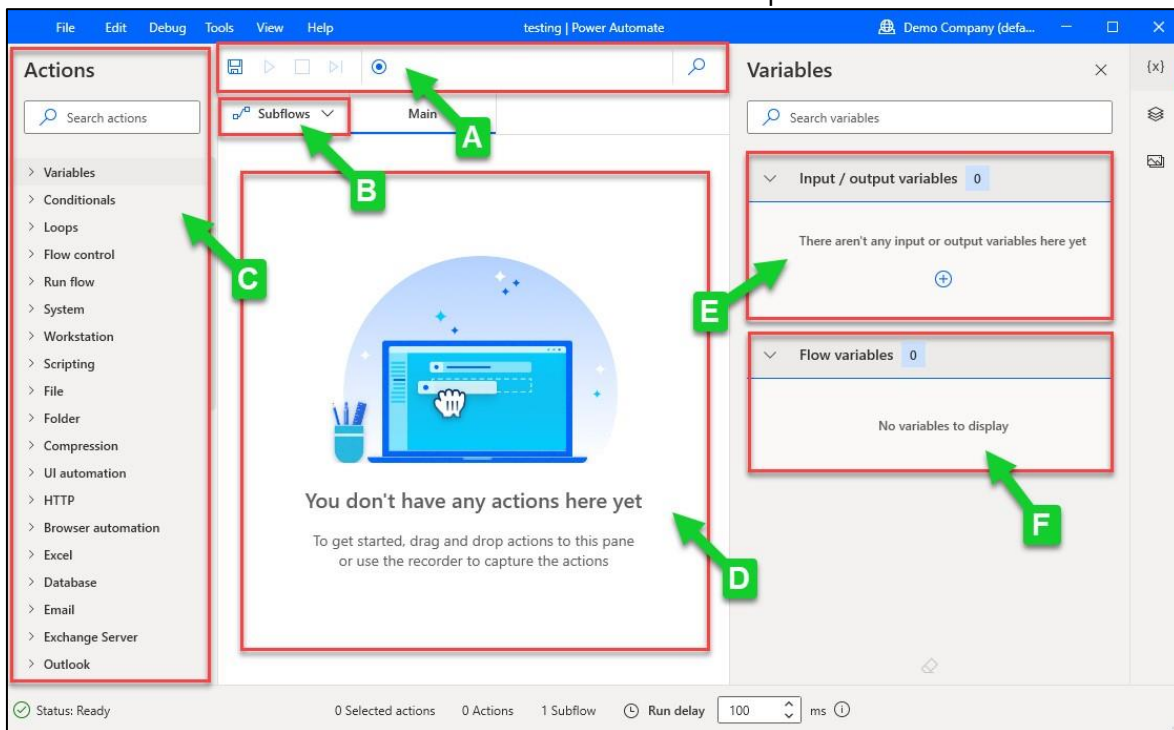


12. Click on the {x} button at the top right corner of the app to open the variables pane.

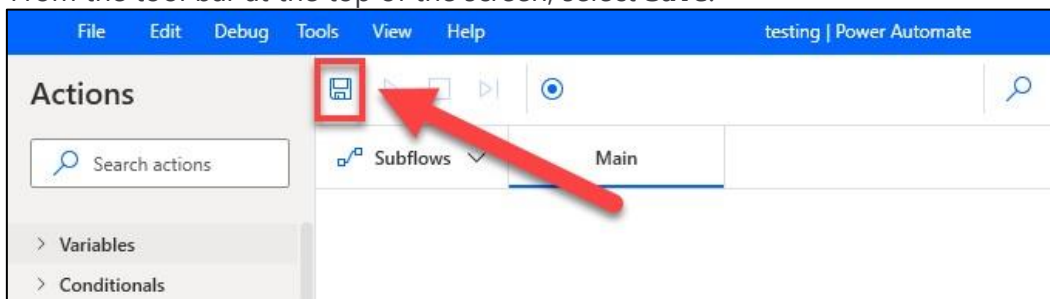


13. Take a moment to check the main sections of the designer which consist of the following toolbars and panes:

- A. **The toolbar** - Contains basic operations for use with actions (Save, Undo, Copy, Debug and Paste) as well as button to start the Recorder and control the process execution (Start/Pause/Stop).
- B. **Subflows** – Allows you to create subflows under your main flow.
- C. **Actions pane** - Contains all Power Automate for desktop Actions and includes a search bar that assists in finding specific actions by matching the action name to the text string.
- D. **Workspace** – Contains all the actions added to the process so far. Functions are separated into tabs.
- E. **Input/output variables** - Contains all the variables you created in the process.
- F. **Flow variables** - List of all variables used in the process.

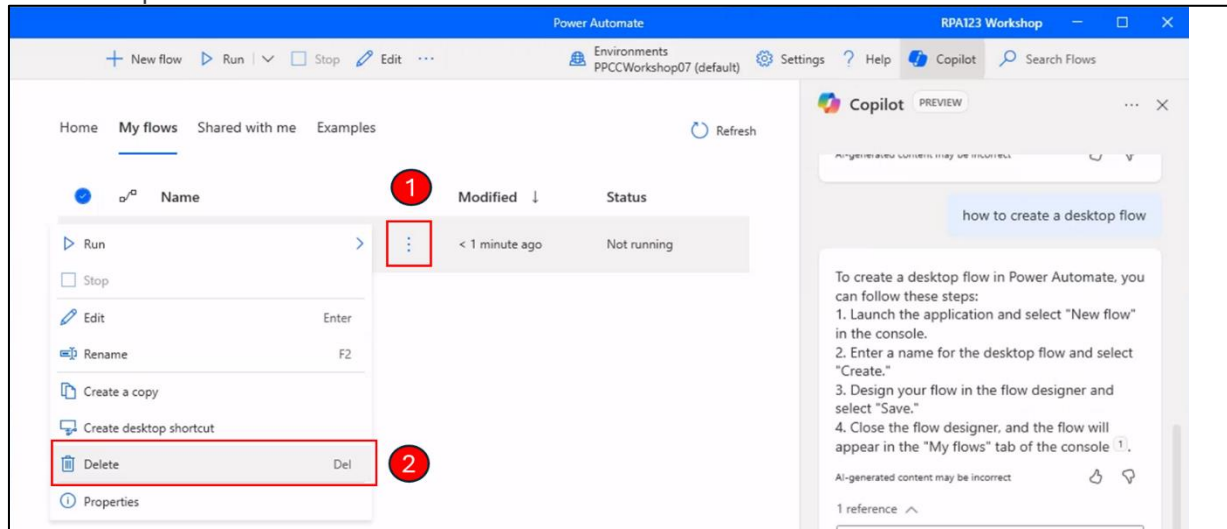


14. From the tool bar at the top of the screen, select **Save**.

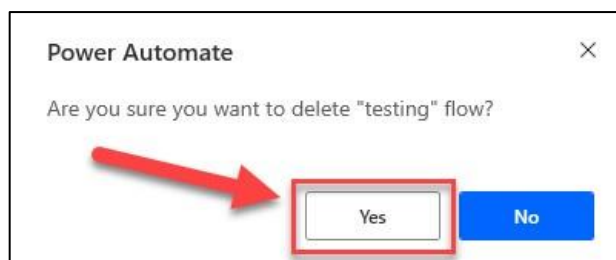


15. **Close** out of the testing flow you created.

16. Select the ellipses (...) to the right of the flow, then select **Delete** to delete the testing desktop flow.



11. Select **Yes** to confirm the deletion.



12. **Close** out of the Power Automate application.

Create your first Power Automate desktop flow

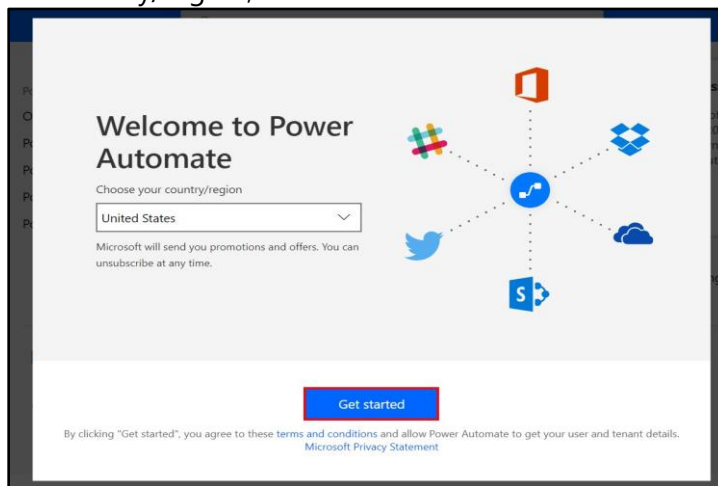
Note: If you haven't, please complete Lab 1 download and install the ContosoInvoicingSetup from the **lab data packages folder**. Pin the app icon to the task bar for quick launch. We will use this app for the recording.

Note: You will need to select "More Information" and "Run it anyway" during installation of the Contoso app if Windows Defender prompts that the app is coming from an untrusted source. This is normal and doesn't expose any risk.

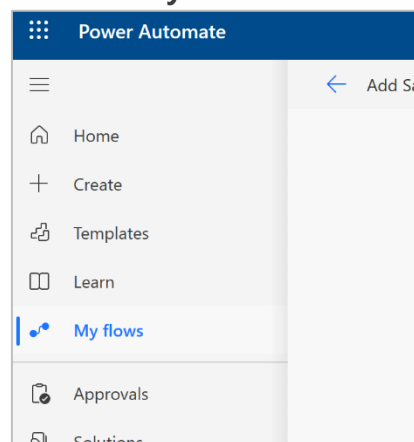
1. Now you are more familiar with Power Automate for desktop app, we will go ahead to create a desktop flow that can help Contoso Coffee shop to enter invoice information into the desktop management system. In the task above, we have shown you how you can create a desktop flow from within the Power Automate for desktop app directly. Now we will also show you another path where you can create and manage desktop flows from the browser side.
2. Open a new web browser and navigate to <https://powerautomate.microsoft.com> then log in using your test account; the same account that you have been using previously in the labs.

Note: For this workshop, please don't use the flows tab from powerapps.com.

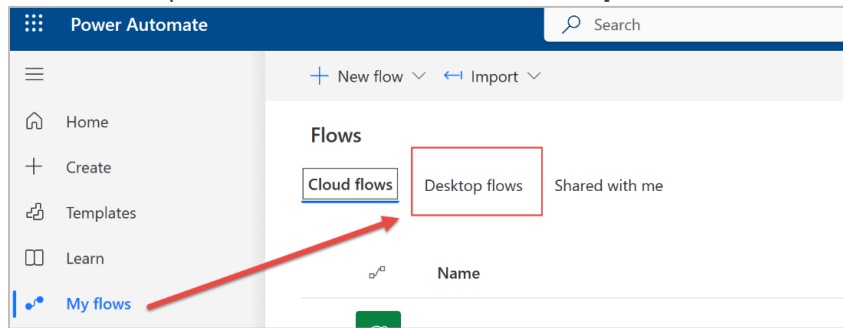
3. If this is the first time you are logging into this site, you may need to choose your country/region, then select the **Get started** button.



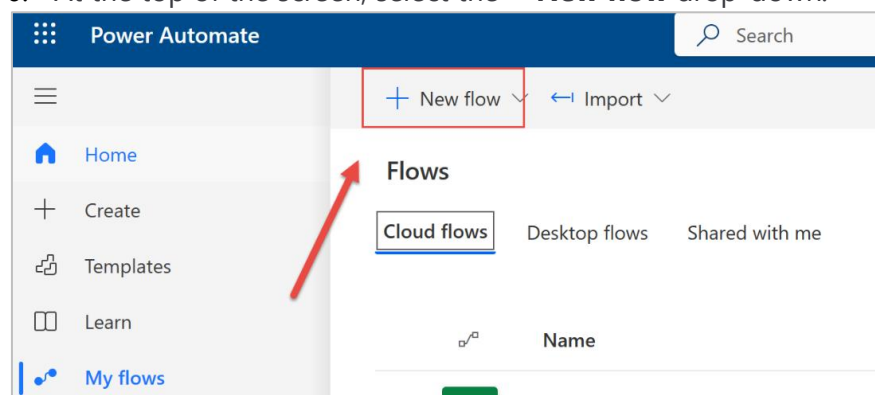
4. Select **My flows** from the navigation menu to the left.



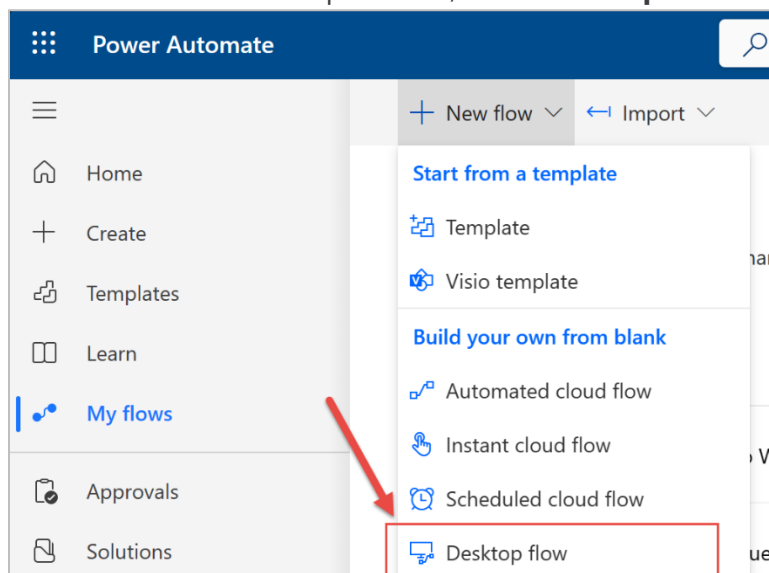
5. At the top of the screen, select the **Desktop flows** tab.



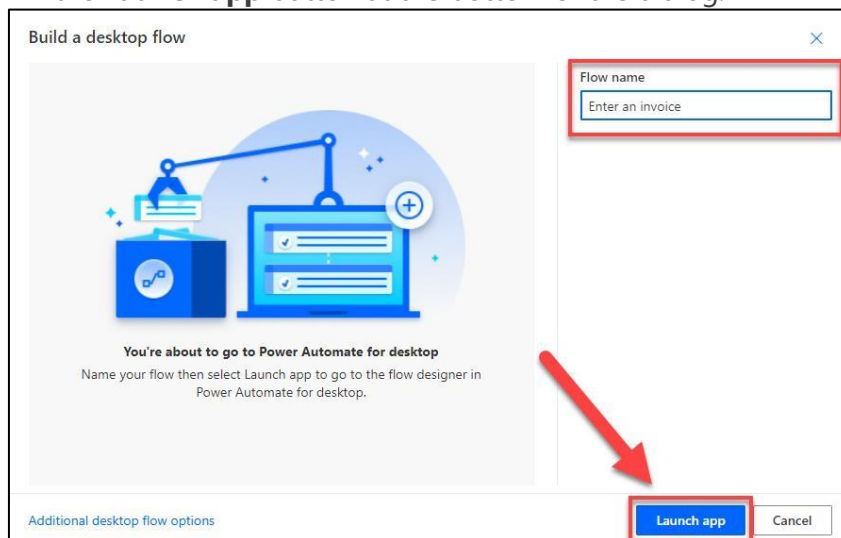
6. At the top of the screen, select the **+ New flow** drop-down.



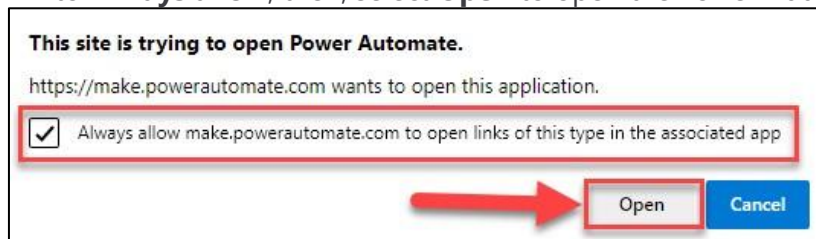
7. From the New flow options list, select **Desktop flow**.



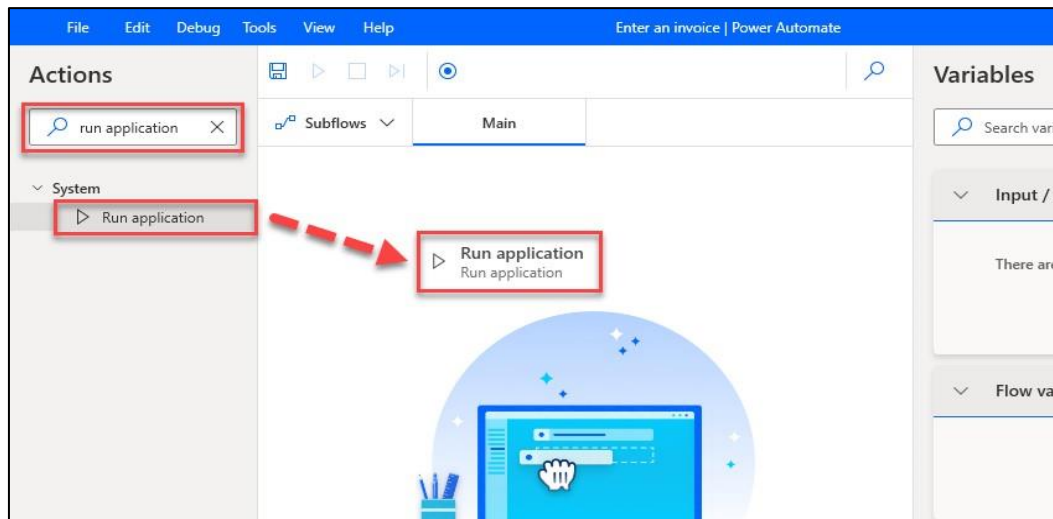
8. In the **Build a desktop flow** dialog box, name the new flow **Enter an invoice**, then select the **Launch app** button at the bottom of the dialog.



9. If you are presented with a dialog that wants to open Power Automate, check the box next to **Always allow**, then, select **Open** to open the Power Automate for desktop app.

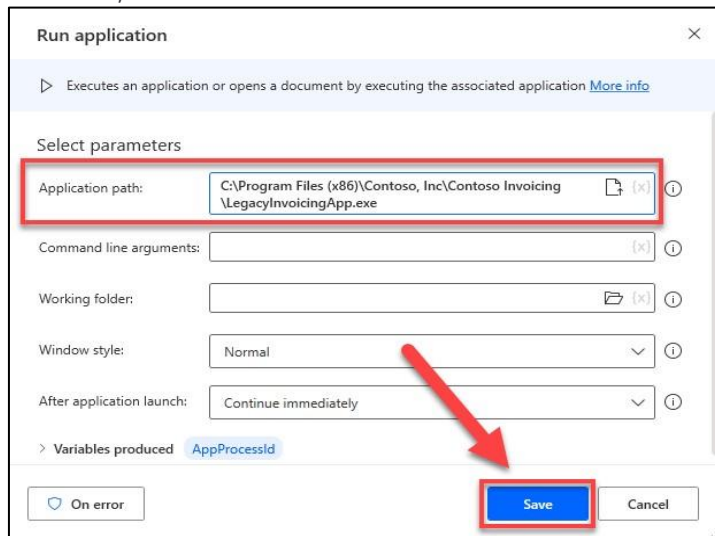


10. Once you are in the PAD designer, in the **search bar** in the **Actions** pane to the left of the screen, type **Run application** then drag the **Run application** action to the **design space** in the middle of the window.

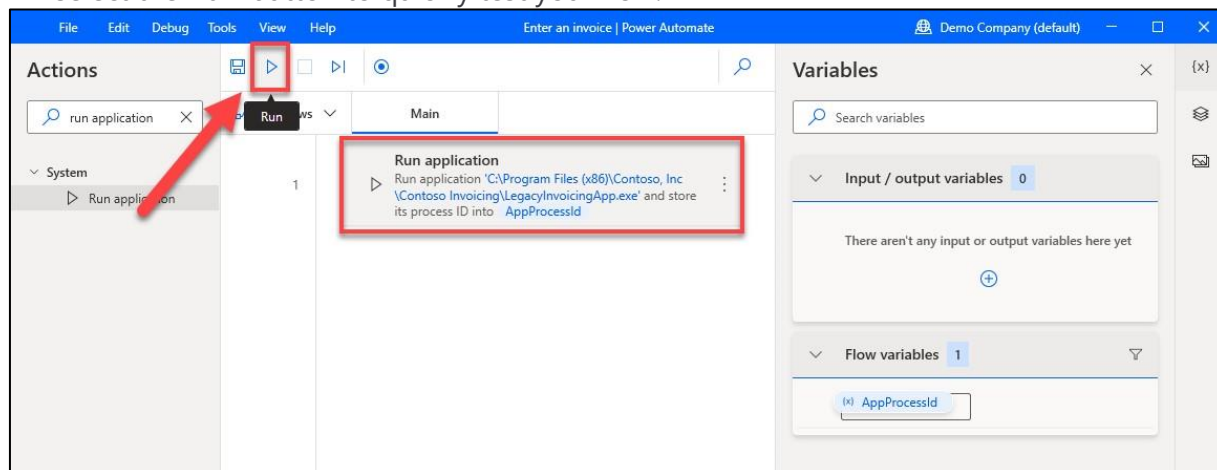


11. Within the **Run application** dialog, for the **Application path parameter**, navigate and select the location path of **Contoso Invoicing app** under **Application path**. (This will open the Contoso Invoicing app when you are running your flow). Usually, it can be found under C:\Program Files (x86)\Contoso, Inc\Contoso Invoicing\LegacyInvoicingApp.exe however, it could be different on your computer.

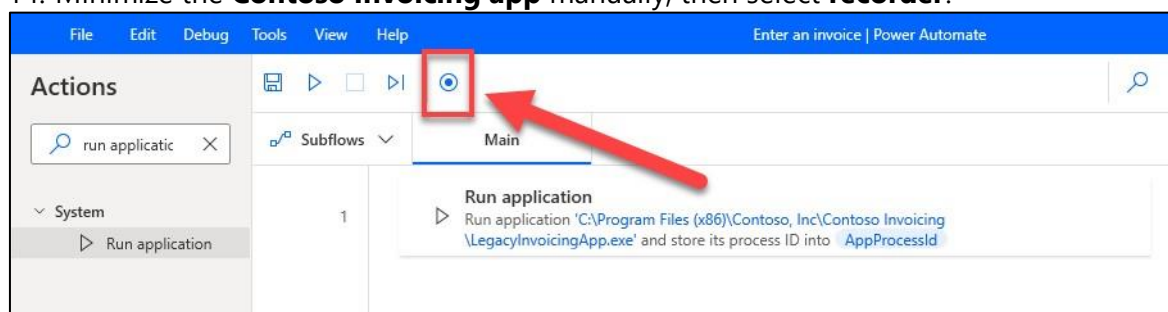
12. Then, select the **Save** button at the bottom of the dialog.



13. Now you have one action in your flow that will open the Contoso Invoicing app. You can select the **Run** button to quickly test your flow.



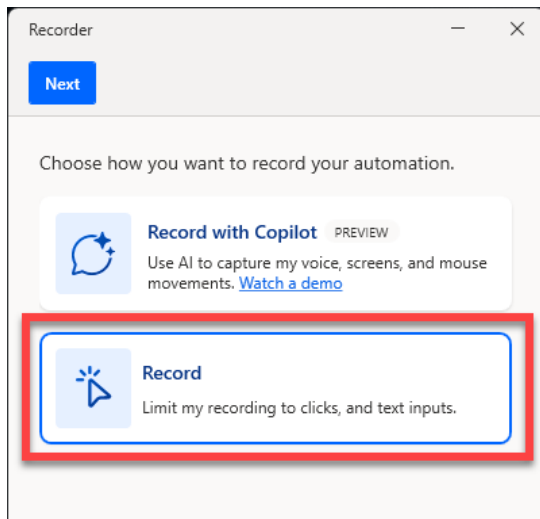
14. Minimize the **Contoso Invoicing app** manually, then select **recorder**.



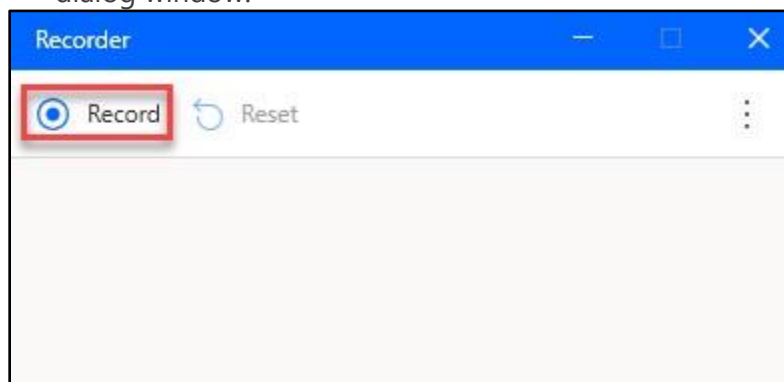
Tip 1: Now we are going to start recording. It is recommended you get familiar with the steps below until the recording is done. This allows you to finish the recording in one shot without the need to go back and forth with this manually. If your first few recordings were not good, feel free to delete the recording after (using the ellipses (...) icon) and practice more until you have a good recording.

Tip 2: to help with the resilience of UI automation playbacks, it is recommended to minimize other apps from your desktop.

15. Select '**Record**', then click on **Next**. We'll look at 'Record with Copilot' later in this lab.

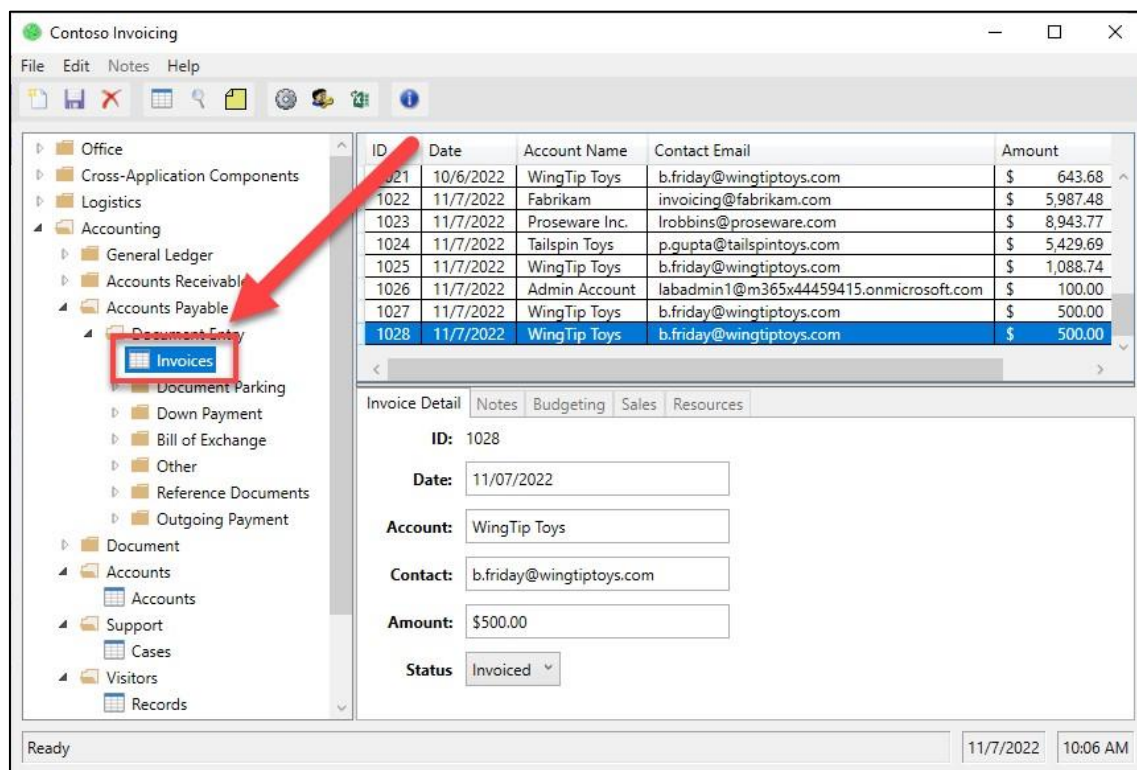


16. Re-open the **Contoso Invoicing app**. Then, select the **Record** button from the **Recorder** dialog window.

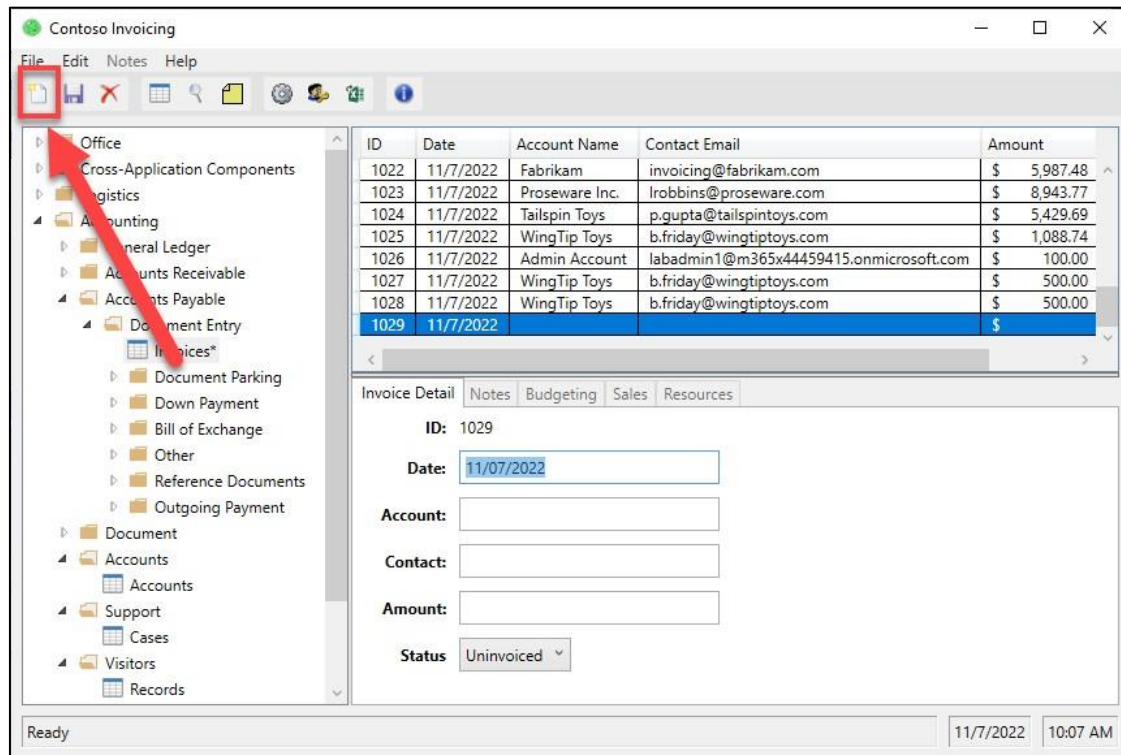


17. In the **Contoso Invoicing application**, select **Invoices** from the menu to the left of the window.

Tip: As your mouse hovers over controls in the app, you'll notice that a red outline highlights each control. Don't record at very fast speed and always wait a bit between each mouse move and select, until you see the blue highlight rectangle around the control first, before you select to select the control. If the red highlight did not show up before you select, the action might not be recorded properly.



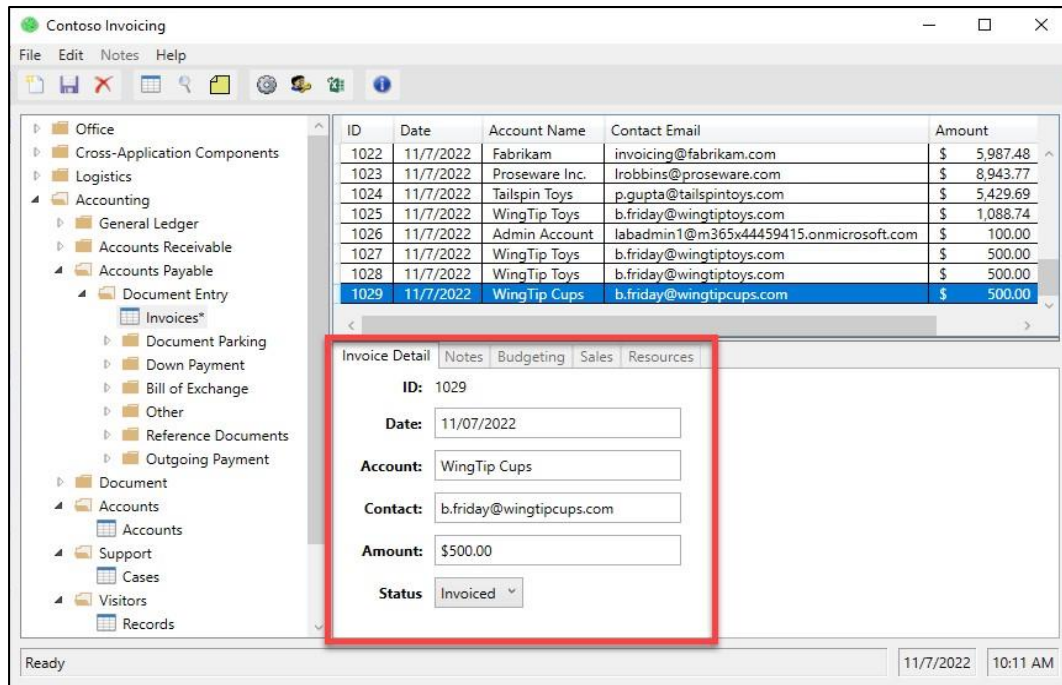
18. Now, create a new record by selecting the **New record** icon from the ribbon at the top of the screen to the left.



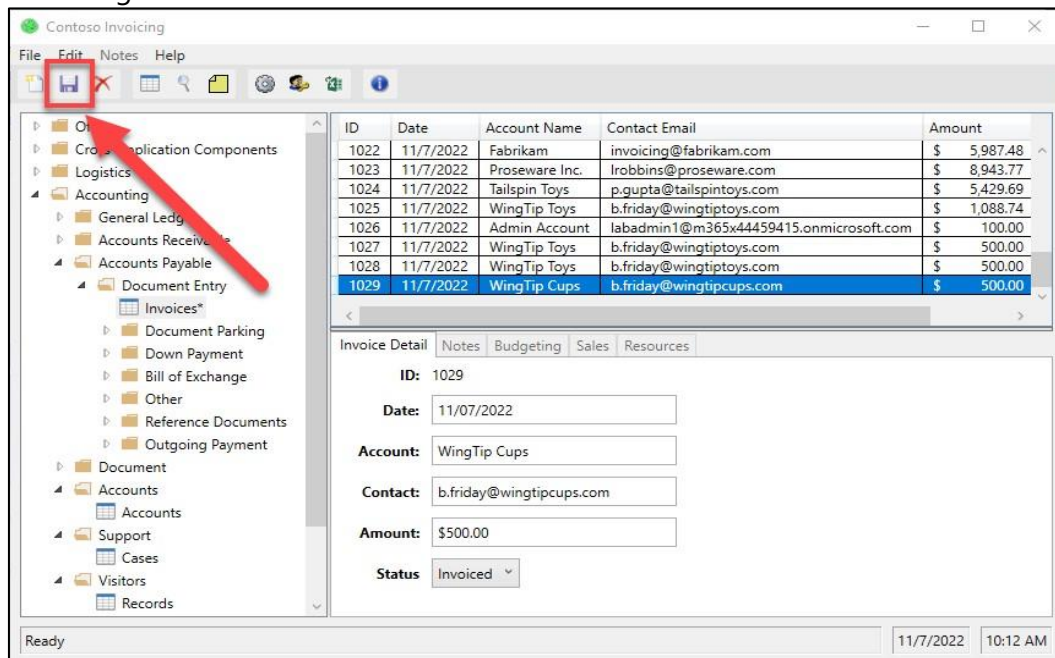
19. Use these sample values to complete the recording (Note: you can also use any arbitrary values)

- Date: Current date
- Account: WingTip Cups
- Contact: b.friday@wingtipcups.com
- Amount: \$500

- Status: Invoiced



20. Select the **Save** icon from the ribbon at the top of the screen, to the left, to keep your changes.

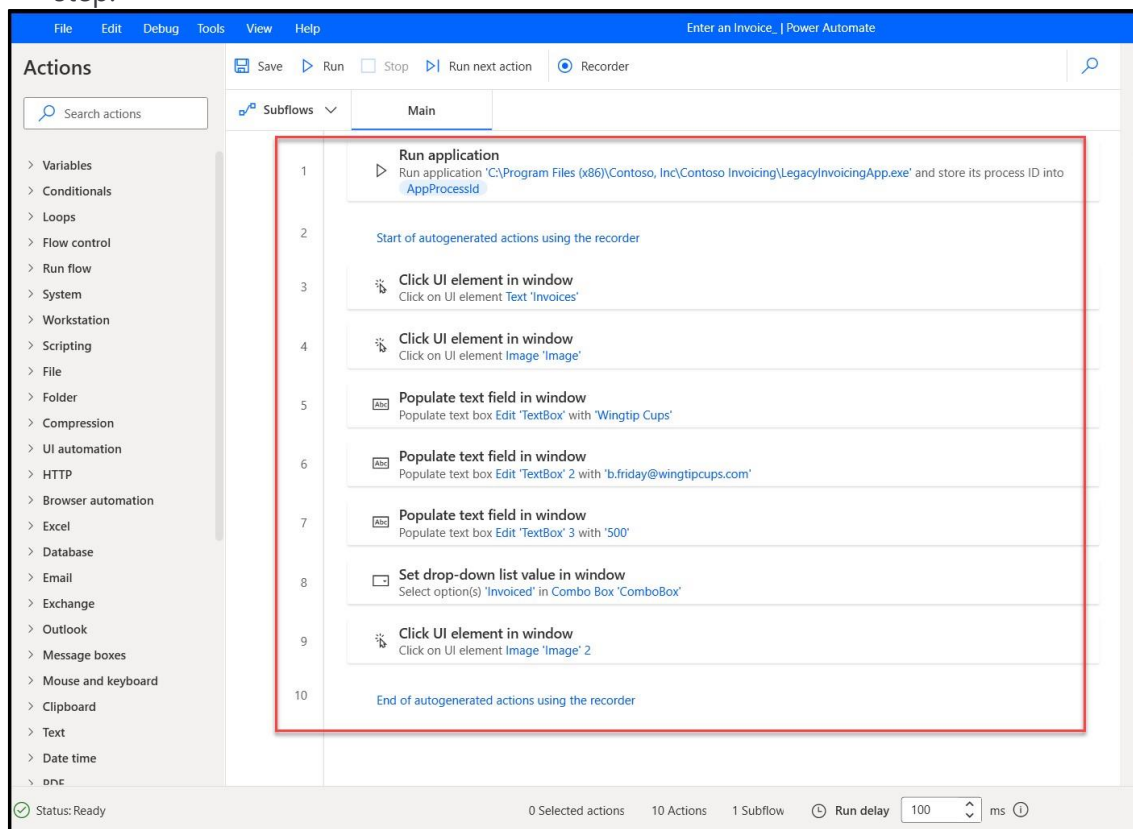


21. Now, select the **Done** button at the bottom of the **Recorder** and **close** the **Contoso Invoicing app**.

Note: We did not record closing the app. This is for simplicity to view the result as the Contoso app will remain open after we test the Desktop flow. In a real-world use case, you can decide to record the closing action or not.

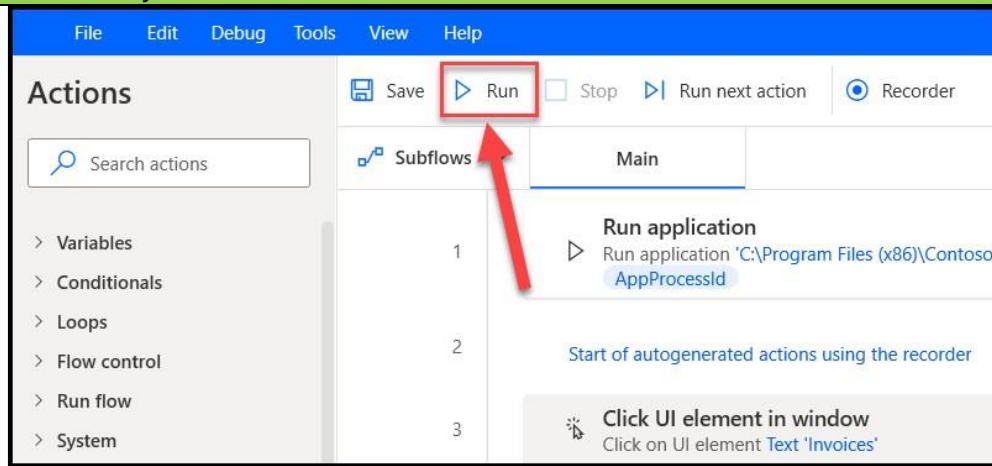
Note 2: By default, the Desktop flow will launch a new instance of the app every time it runs. Even if you leave the app open, the next Desktop flow run will launch another new app window. You can also change this behavior to only attach to existing app instead of launching another new instance from the portal (details see following steps).

22. Within the **Power Automate for desktop app**, you can view the recorded script of each step.

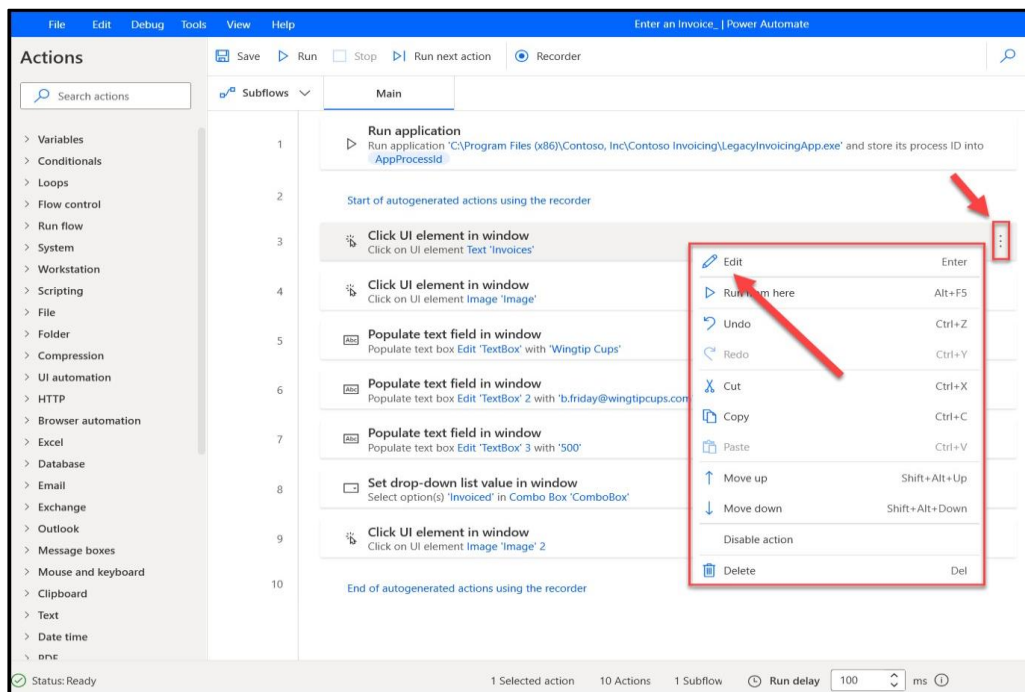


23. You can select the **Run** icon at the top of the screen to playback and test your flow.

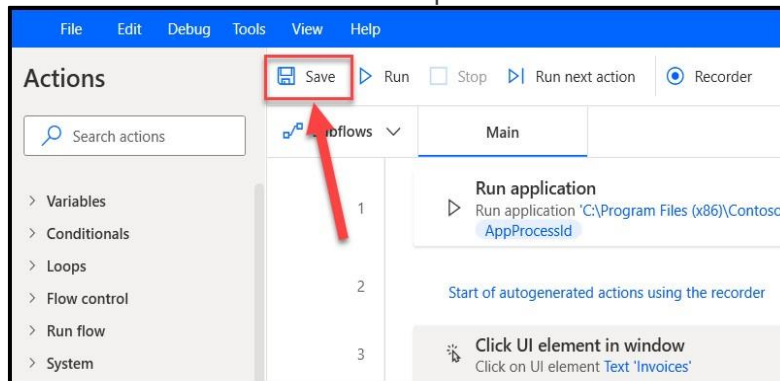
Note: Don't interact with your device during testing. You will see the recording played back successfully.



24. Note that you have different actions (edit, delete, move up/down, etc.) available to handle the different steps that have been added by selecting the ellipses (...) icon to the right of the title. You can also double-click each step to edit the step.



25. Select the **Save** icon at the top of the screen to save this desktop flow



26. **Close** the **Power Automate** application.

Congratulations!!

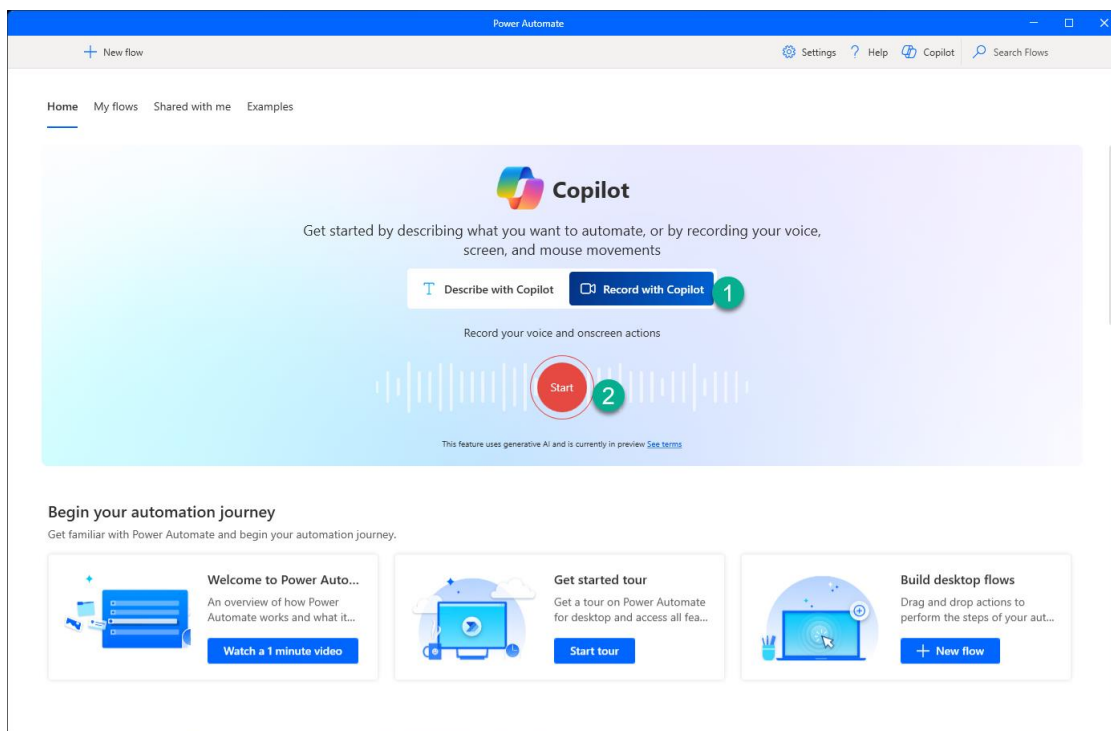
You have completed this Lab!

(Optional: may be done later) Record with Copilot

Congratulations on creating your first flow! You've learned how the recorder can capture a sequence of steps and generate the actions needed to replay them. But what if you need to build a more complex automation, like copying a large amount of data from Excel to a form? At this Power Platform Community Conference 2024, we're excited to announce the public preview of Copilot in the Recorder. This new feature lets you show and explain what you want to automate, and Copilot will build the steps for you automatically. You're one of the first to try it!

We'll be demonstrating this feature during the workshop, but you can also try it out yourself by following these steps:

1. Download the following Excel file, unzip it, and open the Excel file: <https://aka.ms/PPCC-RPA-1>
2. Open the website: <https://aka.ms/PPCC-RPA-2>
3. In the Power Automate Desktop home screen, click 'Record with Copilot' and then 'Start'



4. On the welcome screen, click 'New recording'.
5. Select the screen you want to record and the microphone to use – yes, you'll be talking to Copilot!
6. Review the tips on the next screen, then click 'Record' when you're ready to begin.
7. Use your voice and mouse to explain what you want to automate. For example, you might say, "I want to transfer the data from this Excel file to this form on the webpage. Copy all the rows and click the Submit button after each one" as you show Copilot the Excel file and the web form – just like you would explain it to a colleague.
8. When you're done, click 'Done'. Copilot will analyze your recording, which might take a few minutes.
9. Once the analysis is complete, Copilot will generate a Desktop Flow. You can review it and make any adjustments if needed.

Pro Tip

If you want to reset the data saved in Contoso Invoice app, you can modify or delete the excel file under this folder:

%userprofile%\Documents\Contoso Invoicing - 1.0.15.0

Check your knowledge

5 minutes

1. Copilot in Power Automate for Desktop can only answer questions related to desktop flows.
 - A. True
 - B. False

2. Which of the following panes contains actions that can be used within your automated process?
 - A. Actions pane
 - B. Workspace
 - C. Flow variables
 - D. The toolbar

3. After opening and minimizing the Contoso Invoicing app manually, you will select the _____ button to start your 'Enter an invoice' recording.
 - A. Save
 - B. Recorder
 - C. Run
 - D. Run the next action

Answer Key

1. Copilot in Power Automate for Desktop can only answer questions related to desktop flows.

A. True
B. **False**

Answer: **B.** False – Copilot has access to all the Power Automate documentation and knowledge base. For example, it can answer questions about Cloud flows or work queues.

2. Which of the following panes contains actions that can be used within your automated process?

A. **Actions pane**
B. Workspace
C. Flow variables
D. The toolbar

Answer: **A.** The Actions pane contains reusable components that simplify completing common tasks such as setting a variable, opening a file etc.

3. After opening and minimizing the Contoso Invoicing app manually, you will select the _____ button to start your 'Enter an invoice' recording.

A. Save
B. **Recorder**
C. Run
D. Run the next action

Answer: **B.** The Recorder allows you to start recording your actions within the application.

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