

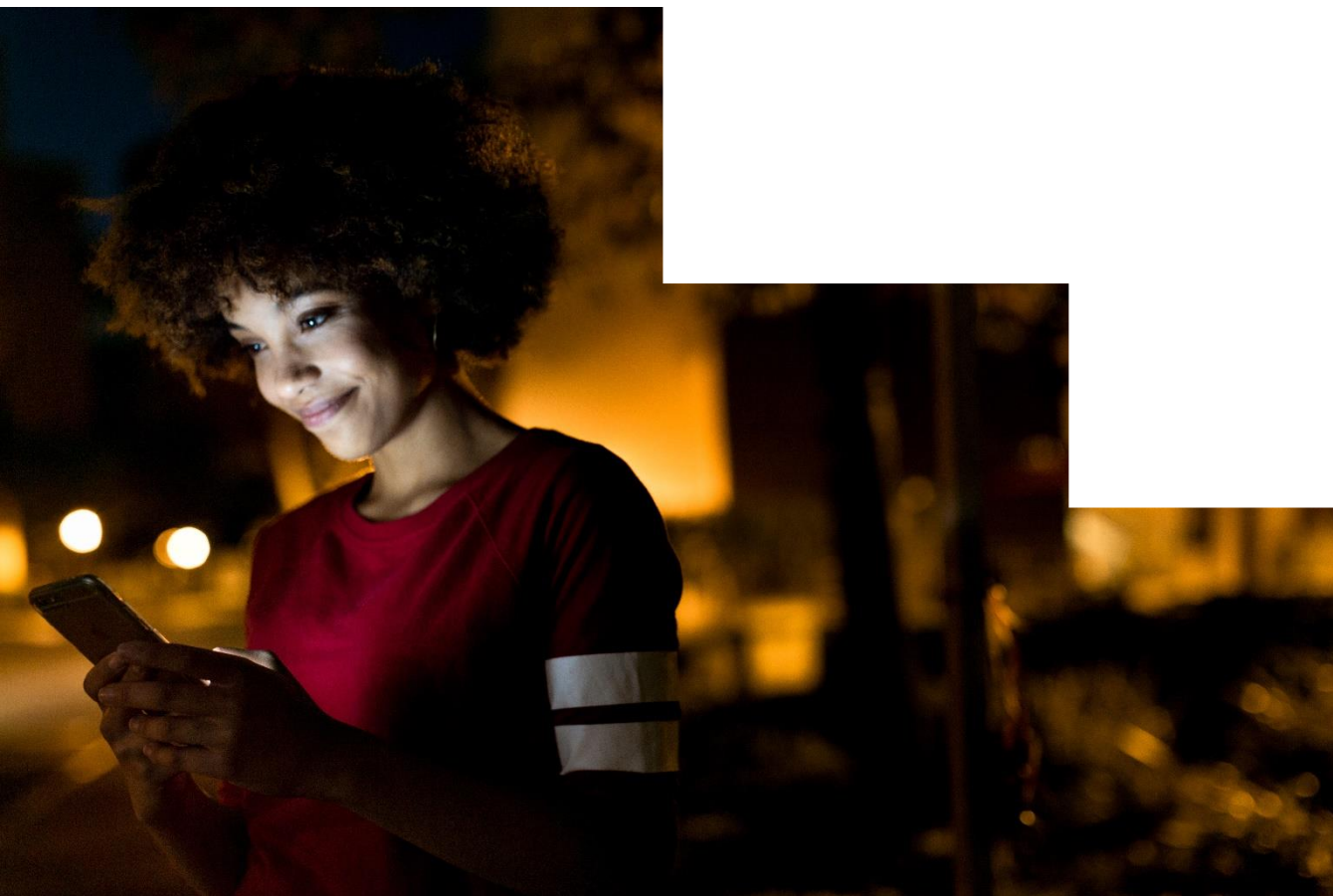


Robotic Process Automation in a Day

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

30 mins

December 2020



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Lab overview

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

Here's what you'll learn:

Power Automate Desktop flows

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

Integration of Desktop flows with API connectors

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

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

Pre-requisite task 1: Setup Tenant

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

Important: If you are provided an existing tenant account with Office and Power Automate (prod or trial) licensing, either provided by your lecture instructors or your IT department, you can skip this lab and start from lab #1.2

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

1. **Work account** to log in to Office 365 tenant (to log in to Office 365 services and to authenticate in on-premises data gateway)
2. **Windows account** (to log in to your computer and to set up a connection)

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

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

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

1. Open a browser and navigate to <https://products.office.com/en-us/business/office-365-enterprise-e3-business-software>

2. Select Free trial to navigate to trial sign up page.

Microsoft | Microsoft 365 Products Capabilities Industry Plans and pricing Resources Support All Microsoft Search Sign in

Office 365 E3

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

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

\$20.00 user/month
annual commitment

[Buy now](#)

[Free trial](#)

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



Thank you for choosing Office 365 E3

① Let's set up your account

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

Next

② Tell us about yourself

③ Create your business identity

④ Get Office

4. Click **Set up account**.



Thank you for choosing **Office 365 E3**

① Let's set up your account

Looks like you need to create a new account. Let's get you started!

Continue as @gmail.com [Not you?](#)

[Set up account](#)

② Tell us about yourself

③ Create your business identity

④ Get Office

5. Fill in your information and click Next.



Thank you for choosing **Office 365 E3**

- 1 Signup started
- 2 Tell us about yourself



First name Virtual	Middle name	Last name Agent
Business phone number 2066666666		
Company name Demo company	Company size 10-24 people ▼	
Country or region United States ▼		

Next

- 3 Create your business identity
- 4 You're all set

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

The screenshot shows the Microsoft Office 365 E3 signup process. At the top, the Microsoft logo is followed by the text "Thank you for choosing Office 365 E3". A vertical progress indicator on the left shows four steps: 1. Signup started, 2. Tell us about yourself (highlighted with a blue circle), 3. Create your business identity, and 4. Get Office. The "Tell us about yourself" section includes a CAPTCHA "Prove. You're. Not. A. Robot." and a request to "Enter a number that isn't VoIP or toll free." There are two radio buttons: "Text me" (selected) and "Call me". Below these are two input fields: "Code (+1)" and "Phone number". A blue button labeled "Send Verification Code" is positioned below the input fields. At the bottom of the section is a link that says "< Go back".

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

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

8. Click **Check availability**.



Thank you for choosing **Office 365 E3**

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



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

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

yourcompany
yourdemocompany .onmicrosoft.com

Check availability Next

- ④ Get Office

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



Thank you for choosing **Office 365 E3**

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



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

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

yourcompany
yourdemocompany .onmicrosoft.com


yourdemocompany.onmicrosoft.com is available.

Check availability

Next

- ④ Get Office

10. Now, let's create admin user ID and password for your tenant domain. You can choose any Name. Once you fill out your username and password, click **Sign Up**.

 Microsoft

Thank you for choosing Office 365 E3

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

✓ ●

Now create your user ID and password to sign in to your account.

Name	admin	@yourdemocompany.onmicrosof...
Password	*****	
Confirm password	*****	

By clicking Sign up, I agree to the [privacy statement](#), [default communication preferences](#) and the [trial agreement](#).

Sign up

[Go back](#)

- 4 Get Office

11. Wait while tenant is created. It usually takes less than 1 min. Then click **Go to Setup**.



Thank you for choosing **Office 365 E3**

- ① Signup started
- ② Nice to meet you, Virtual
- ③ Thanks for creating an account with us, Virtual
- ④ **Get Office**

Save this info. You'll need it later.

Sign-in page
<https://portal.office.com/>

Your user ID
admin@yourdemocompany.onmicrosoft.com



12. This will navigate you to **Office admin portal**. When you land on the admin center page, you need to EXIT SETUP (note this could be a small UI in the bottom right hand corner)

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

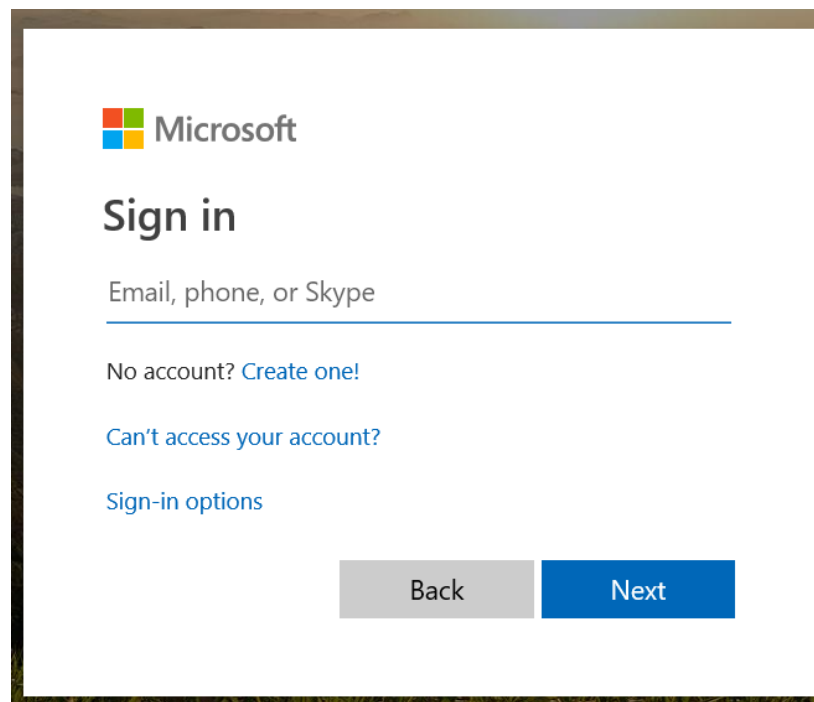
Now, you'll create a trial environment to explore Microsoft Power Automate.

Warning: When your trial expires in 29 days, your data and any customizations will be deleted. You may want to save your work to use in another environment. To do that, export your work as a solution after you complete all the exercises in the Robotic Process Automation in a Day training.

STEP A: Sign in

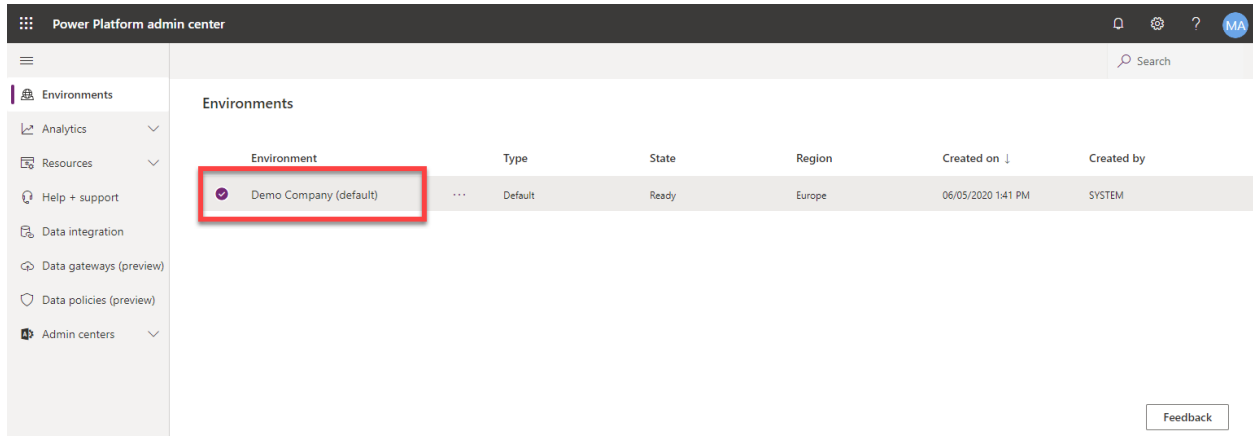
Copy and paste this link: <https://admin.powerplatform.microsoft.com/environments>

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

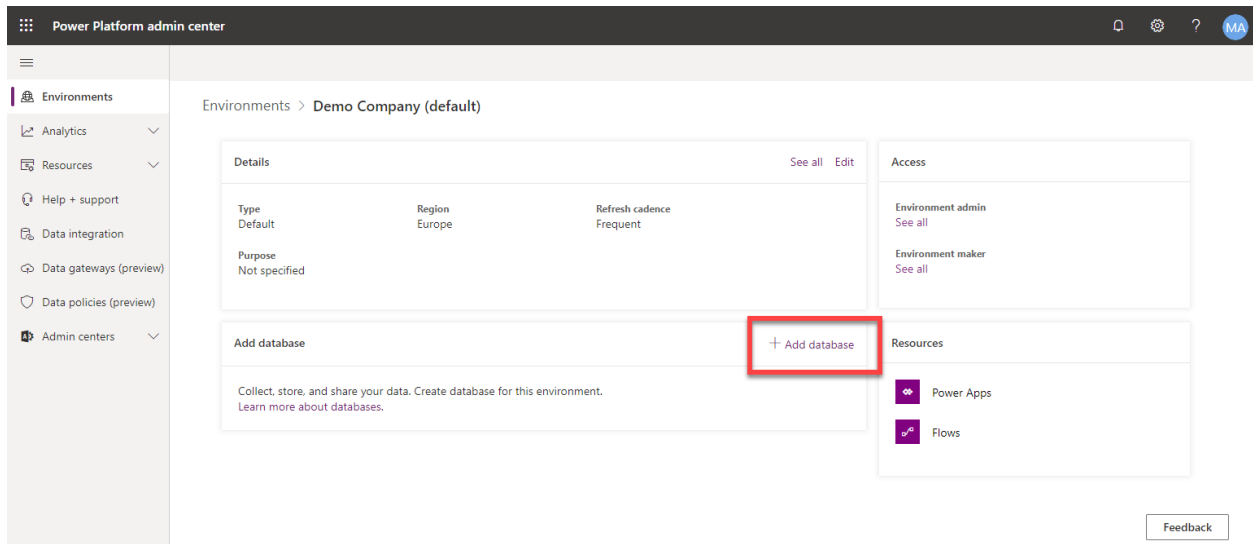


STEP B: Configure your default environment to add a database

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



2. Select **Add database**.



3. Specify values in the **Create a database for this environment** dialog box. Use these values:

- **Currency:** USD
- **Language:** English

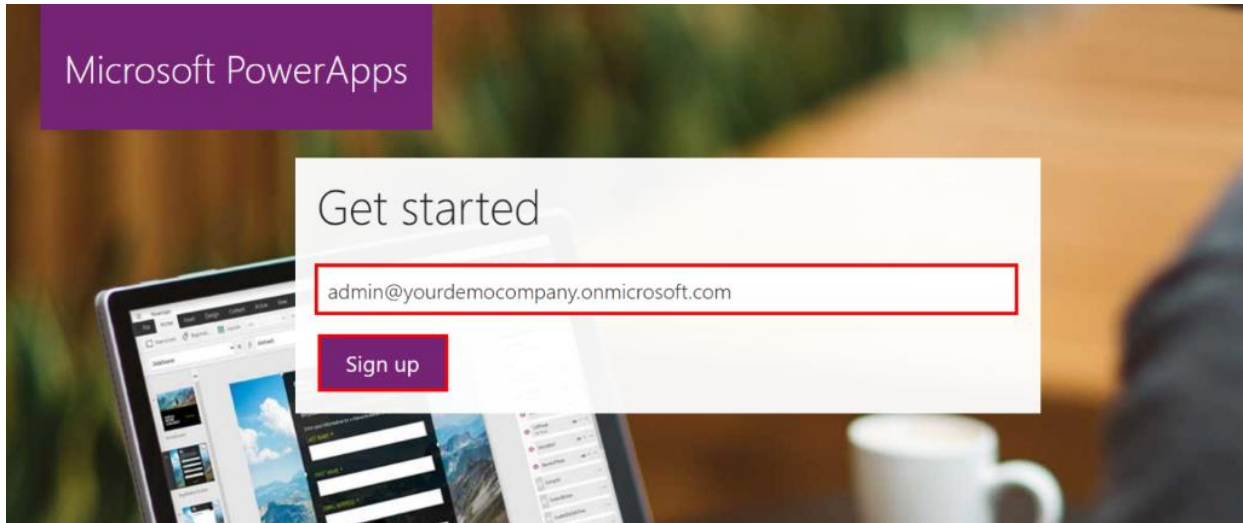
Then click **Add**.

The screenshot shows the Power Platform admin center interface. On the left is a navigation pane with options like Environments, Analytics, Resources, Help + support, Data integration, Data gateways (preview), Data policies (preview), and Admin centers. The main area displays 'Environments > Demo Company (default)'. A table shows environment details: Type (Default), Region (Europe), Refresh cadence (Frequent), and Purpose (Not specified). Below the table is an 'Add database' section with a '+ Add database' button. An 'Add database' dialog box is overlaid on the right, containing configuration options for Language (English), Currency (USD (\$)), Dynamics 365 apps (No), sample apps (No), and security group (+ Select). The 'Add' button at the bottom right of the dialog is highlighted with a red box.

Your environment will be ready after the database is provisioned.

Note: creating a database may take up to one minute.

Note: You may be asked to sign in again.



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

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

Create a database for this environment ?
Choose the currency and language your data should use.

Currency ?
USD

Language ?
English

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

Cancel Create my database

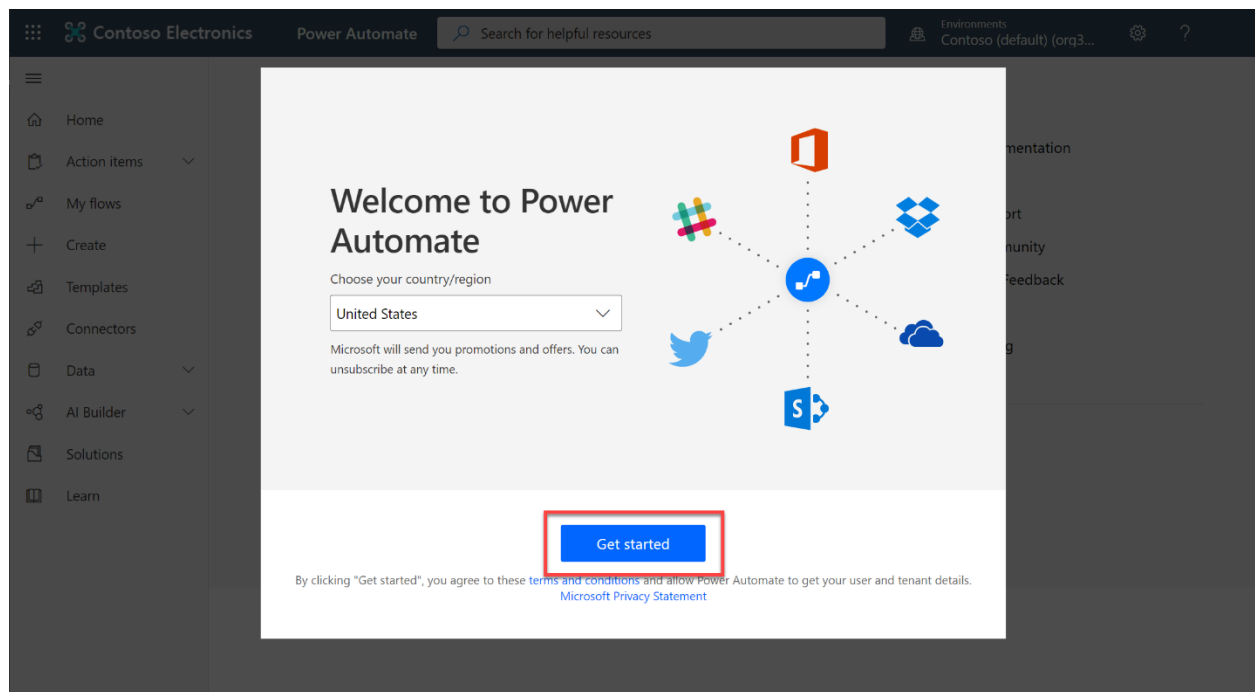
4. After you clicked the **Create my database**, you can see the database provisioning progress.

Pre-requisite task 3: Start per user plan with attended RPA trial license

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

Copy and paste this link: <https://flow.microsoft.com/en-us/pricing/>.

Note: If you are already signed in using the test account's e-mail you created for this tenant domain you will first see the dialog window as presented below. Click "Get started":



On the pricing page click the link "Try free":

Power Automate pricing

US Dollar (USD\$)

License by user

Plan	Description	Price	Action
Per user plan	Allow individual users to create unlimited flows based on their unique needs.	\$15 per user/month	Buy now >
Per user plan with attended RPA	Allow individual users to create unlimited flows, plus automate legacy applications through robotic process automation (RPA) and AI.	\$40 per user/month	Buy now > Try free >

License by flow

Plan	Description	Price	Action
Per flow plan	Implement flows with reserved capacity that serve unlimited users across an organization.	Starting at \$500 for five flows per month ¹	Buy now >

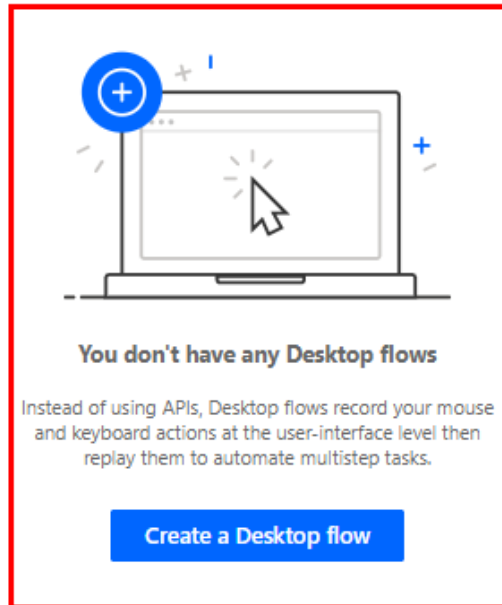
After you click the link you will be redirected to the Power Automate service. If you are not signed in, do it using the test account's e-mail (Microsoft Account) you created for this tenant domain.

Next navigate to the Desktop flows tab. Once you open it, you will see a dialog window giving you the option to start a free trial. Click the "Start trial" button.

Important! After you clicked the button, you may need to wait even up to an hour until the change is processed and the trial license starts to work.

Once the trial is enabled, the below image appears that displays the button to start creating Desktop flows:

Desktop flows



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

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