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# Power Automate Desktop

## Building and reviewing practical desktop flows

FA-0653 · 2 days

Automation, RPA & Power Platform

Build and debug desktop flows with variables, conditions, loops, Excel, email and web actions; explore optional UI, AI Builder and run-management topics where the training setup permits.

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## Introduction

This two-day course introduces Microsoft Power Automate for desktop through selected, practical automation exercises. Participants work from a simple recorded flow to data handling, control logic, error handling and application integration.

The core exercises focus on local, attended desktop flows in a prepared Windows environment. Excel, email and browser examples use illustrative data and authorised training accounts. Automation must be tested against application changes and reviewed before it changes files or sends messages.

Advanced UI automation, AI Builder, cloud-triggered runs and unattended operation are optional demonstrations or bounded exercises, subject to available time, supported applications, organisational policies, licences and capacity. The course does not promise mastery, unrestricted deployment or guaranteed productivity gains.

## Learning outcomes

The course teaches participants to:

- Explain desktop RPA and select suitable repetitive tasks.
- Create, record, test and debug a simple desktop flow.
- Use variables, input/output parameters, conditions and loops.
- Handle errors and inspect execution logs.
- Read and write training Excel workbooks and manage application instances.
- Use a supported Outlook integration and browser actions with appropriate permissions.

- Explain the differences between local attended runs, cloud orchestration and unattended operation.
- Review optional AI Builder or advanced UI examples where entitlements and the lab permit, and identify maintenance requirements.

# Prerequisites

- Basic proficiency in using Windows-based applications.
- Familiarity with Microsoft Office tools, especially Excel and Outlook.
- An understanding of basic logical constructs (e.g., if-then statements, loops).

A prepared, supported Windows machine with Power Automate for desktop and the selected Office/browser applications. Email exercises require an approved test account and a compatible integration; local Outlook actions require classic Outlook, not new Outlook. Any cloud, AI Builder or unattended exercises require the relevant accounts, environment, permissions and licence/capacity entitlements arranged beforehand.

# Training outline

## 1. Day 1 – Desktop-Flow Foundations

### Introduction and environment

- Robotic Process Automation: suitable tasks, practical limits and review of business value
- Navigating the Power Automate Desktop interface.
- Reviewing the prepared development environment and access

### Your first flow

- Creating simple automation flows.
- Recording user actions using the desktop recorder.
- Testing and debugging flows.

### Variables and data

- Understanding different variable types.
- Implementing input and output parameters.
- Manipulating data within flows.

## Loops and conditions

- Implementing loops for repetitive tasks.
- Using conditional statements to control flow logic.
- Readable, maintainable control structures and bounded loops

## Errors and debugging

- Setting up error handling mechanisms.
- Using breakpoints and debugging tools.
- Logging and monitoring flow executions.

# 2. Day 2 — Application Integration and Review

## Excel automation

- Reading from and writing to Excel files.
- Automating data processing tasks.
- Handling Excel instances and workbooks.

## Email with a supported Outlook integration

- Sending and retrieving training email using classic Outlook actions or an approved Office 365 Outlook connector, depending on the setup
- Processing email attachments and content.
- Email-event orchestration through an appropriate cloud trigger or connector where supported; not a universal local desktop event trigger

## Web automation

- Automating web-based tasks using the web recorder.
- Extracting data from web pages.
- Dynamic elements, selectors and sessions: handling fragility and access restrictions

## Optional: advanced UI automation

- Interacting with desktop applications.
- Using image recognition and OCR for automation.

- Simulating mouse and keyboard actions.

## Optional: AI Builder

- AI Builder overview and environment/capacity requirements
- Demonstration of a prepared form or invoice extraction model with illustrative documents and result review
- Using reviewed AI outputs in a configured flow; AI Builder or Copilot Credit consumption depends on the environment

## Optional: running and managing flows

- Attended and unattended operation: requirements, session constraints and entitlement differences
- Cloud-triggered or scheduled operation where supported and licensed; overview if the lab is not provisioned
- Monitoring, exception review and maintenance after application changes

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