



# Power Automate Desktop

Sample manual - first two chapters



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# CHAPTER 1 - GETTING STARTED

## 1.1 What is Power Automate Desktop (PAD)?

*Power Automate Desktop* (henceforth abbreviated to *PAD* in this manual) is an example of *Robotic Process Automation (RPA)* software.

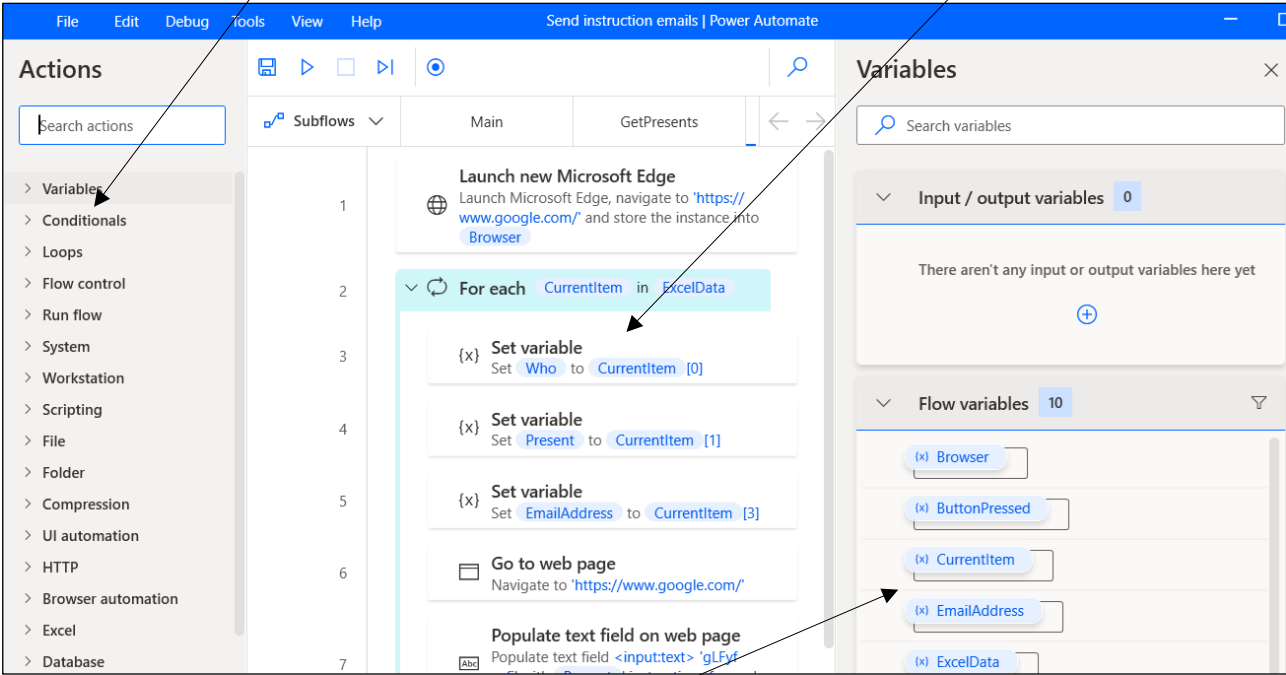


*Two three-letter acronyms in the first paragraph of the manual! We thought it was best to get them all out of the way at the start ...*


You can use *PAD* to create flows like this (the three main parts of the *PAD* screen are shown):

A flow consists of a large number of different *actions* that you can add (a big part of learning *PAD* is to learn what actions are available, and how you might use and combine them).

Each *flow* consists of a sequence of instructions. These can include conditions or (as here) loops, so a flow isn't necessarily just executed once from start to end before finishing.



You can use *variables* to hold information that you later want to get back, such as the name of an Excel workbook, a file path or a value you've read in from a file, website or some other source.



*Note that – perhaps surprisingly – PAD doesn't have a dark mode (if you don't like white backgrounds you may want to turn your screen brightness down).*

## 1.2 Requirements for Using PAD

Here are the main requirements for installing and using *PAD* (there are many others listed on the Microsoft website, such as the need to have a keyboard attached!):

Requirement	Notes
<i>Windows 10 or higher</i>	For Windows 10 you'll need to download <i>PAD</i> from the Microsoft Store to install it; for Windows 11 it comes included in your operating system.
<i>Administrator account</i>	You will need to be logged on with an administrator account on Windows to install <i>PAD</i> .
<i>Microsoft account</i>	You will need to be logged on with a Microsoft account to use <i>PAD</i> .
<i>Edge or Chrome</i>	You'll need to be using Edge (version 80 or above) or Chrome as a browser.
<i>Internet connection</i>	You will need to be connected to the Internet.



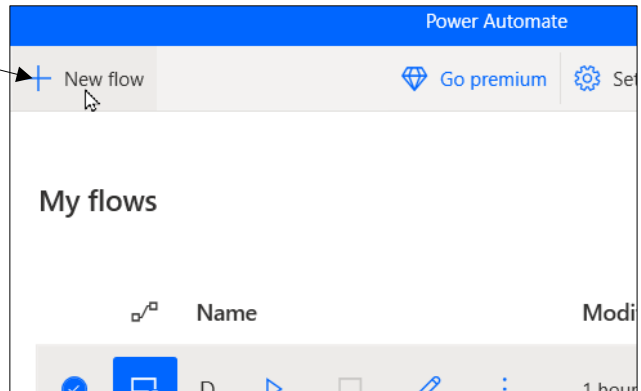
*The flows that you create may run on your own computer, but they are stored in the cloud – hence some of the requirements above.*

## CHAPTER 2 - FLOWS

### 2.1 Creating Flows

This page will show how to create just about the simplest flow you can – a single step to display a pop-up message:

- a) In *PAD* click on this button at the top left of the main window to create a new flow (or you can press **Ctrl** + **N** ).



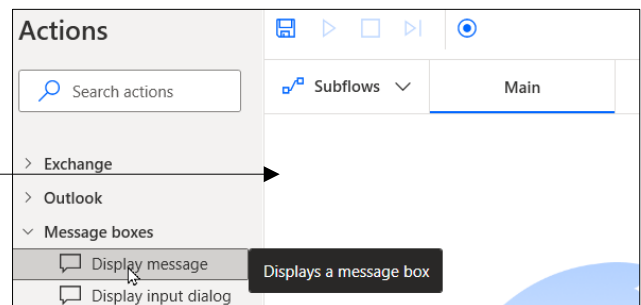
- b) Type in a name for your new flow, then click on **Create** to add it.

Flow name

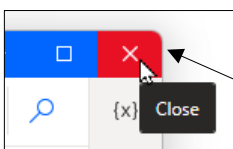
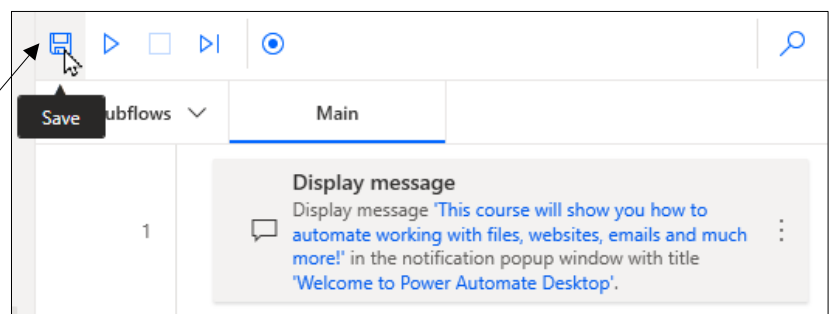
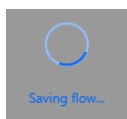
Name	Modified	Status
Show a simple message	< 1 minute ago	Currently editing
Send instruction emails	2 months ago	Not running

- c) *PAD* will show your new flow in the **My flows** list.

- d) Find an action that you want to add to your flow, and either click and drag on it (to add it at a particular position) or just double-click on it (to add it to the end of your current list of actions).



- e) When you've completed your action by filling in (in this case) a simple form which appears – not shown here – click on this tool or press **Ctrl** + **S** to save your flow:



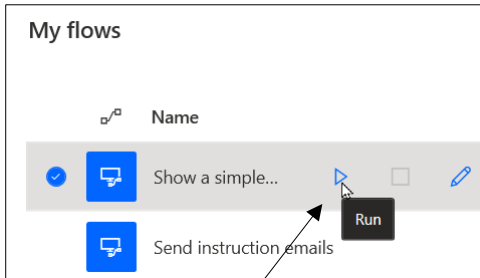
- f) Click on the cross at the top right of this flow's window to close it down, returning control to your flow list.



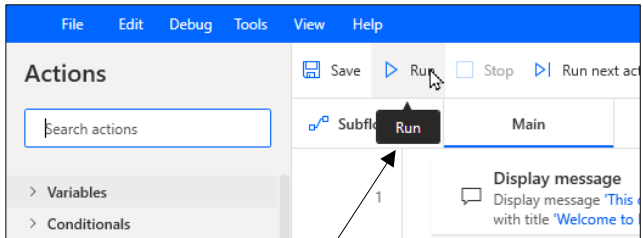
## 2.2 Working with Flows

### Running Flows

There are two ways to run a flow, depending on whether you currently have it open for editing or not:



From the list of your flows click on this icon to run any particular one ...



... or if you already have a flow open, either click on this icon to run it or press **F5** .

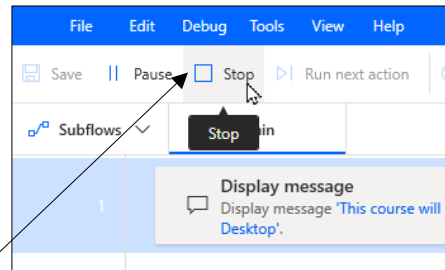
### Stopping a Flow

If you want to interrupt a flow which is currently running, again there are two ways:



From the list of flows, click on the blue square next to the running flow which you want to abort ...

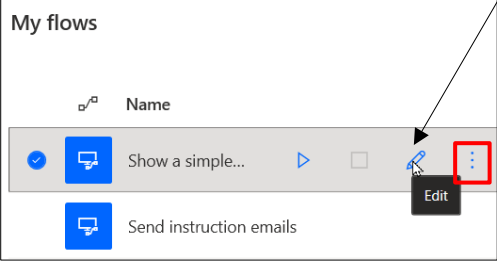
... or if you already have a flow open and running, click on this button or press **Shift + F5** to stop it.



You can also press **Ctrl + Shift + Alt + T** to stop a flow which is running (you can change this keyboard short-cut by clicking on the **Settings** button at the top of the list of Power Automate flows).

## 2.3 Editing, Copying, Renaming or Deleting Flows

This section shows how to edit, copy, rename and delete flows.

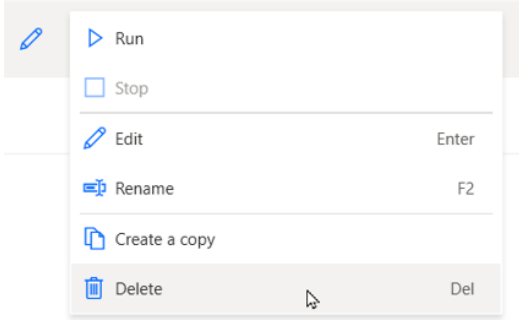


**My flows**

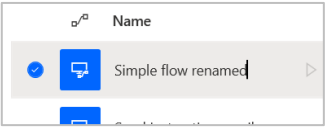
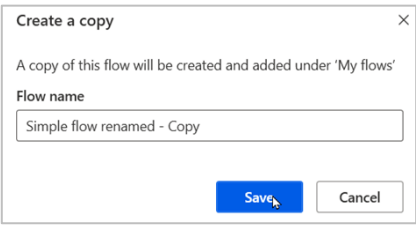
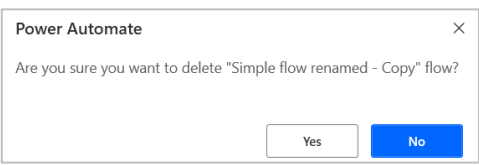
Name
Show a simple...
Send instruction emails

To edit a flow, either click on the pencil icon next to its name or just double-click anywhere on the flow.

To copy, rename or delete a flow click on these three dots, then choose one of the options below:










































If you're copying, renaming or deleting you can then proceed as follows:

Action	Dialog box	Notes
<i>Rename</i>		Type in a new name for your flow, then press <b>Enter</b> .
<i>Create a copy</i>		Type in a name for your new flow (which will be a copy of the original) then press <b>Enter</b> .
<i>Delete</i>		Click on the <b>Yes</b> button to confirm that you want to delete this flow.



*Renaming a flow can be frustrating! Click once in the name box to start typing, but avoid the temptation to click a second time (otherwise you'll just exit renaming mode without making any changes).*

## What we do!

		Basic training	Advanced training	Systems / consultancy
<b>Office</b>	Microsoft Excel			
	VBA macros			
	Office Scripts			
	Microsoft Access			
<b>Business Intelligence</b>	Power BI			
	Power Apps			
	Power Automate / PAD			
<b>SQL Server</b>	SQL			
	Reporting Services			
	Report Builder			
	Integration Services			
	Analysis Services			
<b>Coding</b>	Visual C# programming			
	VB programming			
	DAX			
	Python			



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Training

