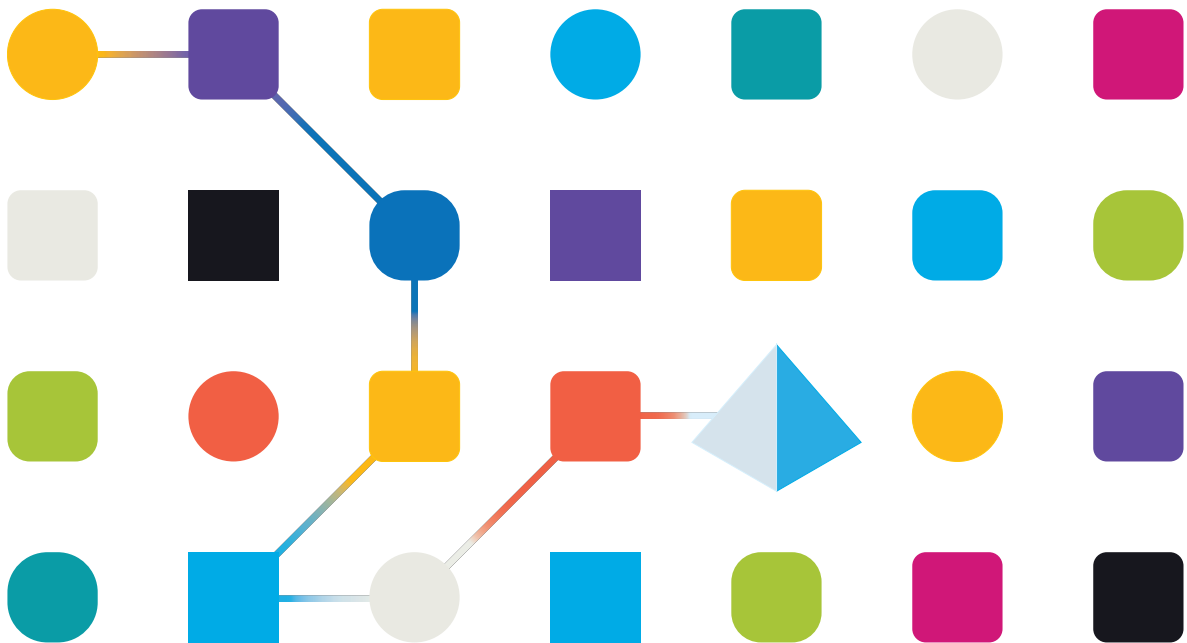




Blue Prism Cloud

Accessing Your Platform

Document Revision: 1.0



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Accessing your Blue Prism Cloud platform

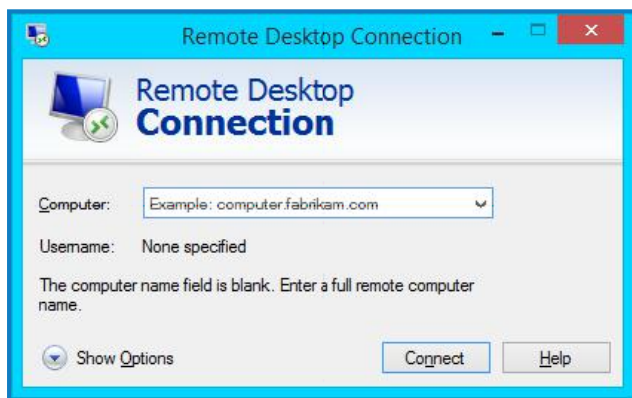
This guide details how to access your Blue Prism Cloud Digital Workforce platform along with other items of useful information.

Architecture

Details of the Blue Prism Cloud architecture can be found in the Blue Prism Cloud Application Architecture data sheet which is available separately.

Running Remote Desktop

To access your Blue Prism Cloud Workforce you will need to use an application called Remote Desktop Connection.




To access Remote Desktop Connection:


1. Right-click on the Windows start button and select **Run**.
The Run dialog displays.
2. In the Open field, type *mstsc* and click **OK**.
Remote Desktop Connection opens.

Logging into the Management Server

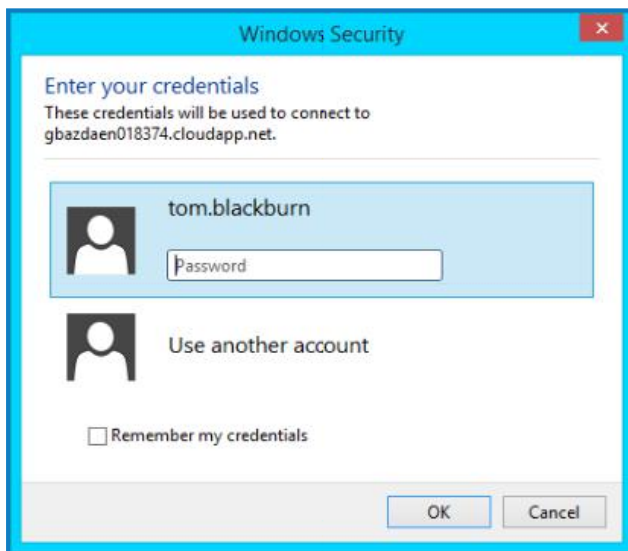
Before attempting to RDP to the Management Server (MS) on your Blue Prism Cloud platform, you should ensure that you have successfully initiated a JIT (Just in Time) VM access request to the Management Server. Instructions on how to do this are detailed in the Azure Management document.

 JIT is not applicable for BPC Platforms where customers are RDP-ing to the Management Server using the private IP address, i.e. the site-to-site VPN.

1. In Remote Desktop Connection, type in the internal/private IP address of your Management Server in the Computer field.

 The server details such as Private IP, Machine Name, Windows Username and Windows Password should already be with the requested end user upon your Blue Prism Cloud Platform Handover. If you do not have the server details of the Management Server, then please email cloudsupport@blueprism.com to request for these to be shared.

The Windows Security dialog displays.



2. Enter your provided credentials: username and password.

Management Server Desktop

Once logged in you will be able to see the Management Server desktop. It is important to note that no automations are run on the Management Server – the purpose of this system is the management of the digital workforce and is seen as a staging and control area for the automations.

From this desktop, you can do two things:

- View and control the Digital Workers
- Restart an automation.

Accessing the Digital Workers

To access the Digital Workers for operator or developer activities, or at times IT support access the method below is recommended.

VNC to a Digital Worker

1. Open the folder on the Management Server desktop named Virtual Worker Access. Inside the folder there will be shortcuts for all of your Digital Workers.
2. Double click the shortcut for the Digital Worker you want to access.

The Vnc Authentication dialog displays.



3. Enter the appropriate VNC account credentials for the Digital Worker being accessed. The VNC connection is made using admin mode which enables development or configuration work to be performed.
4. Click **OK** to open a VNC window to the Digital Workers desktop.

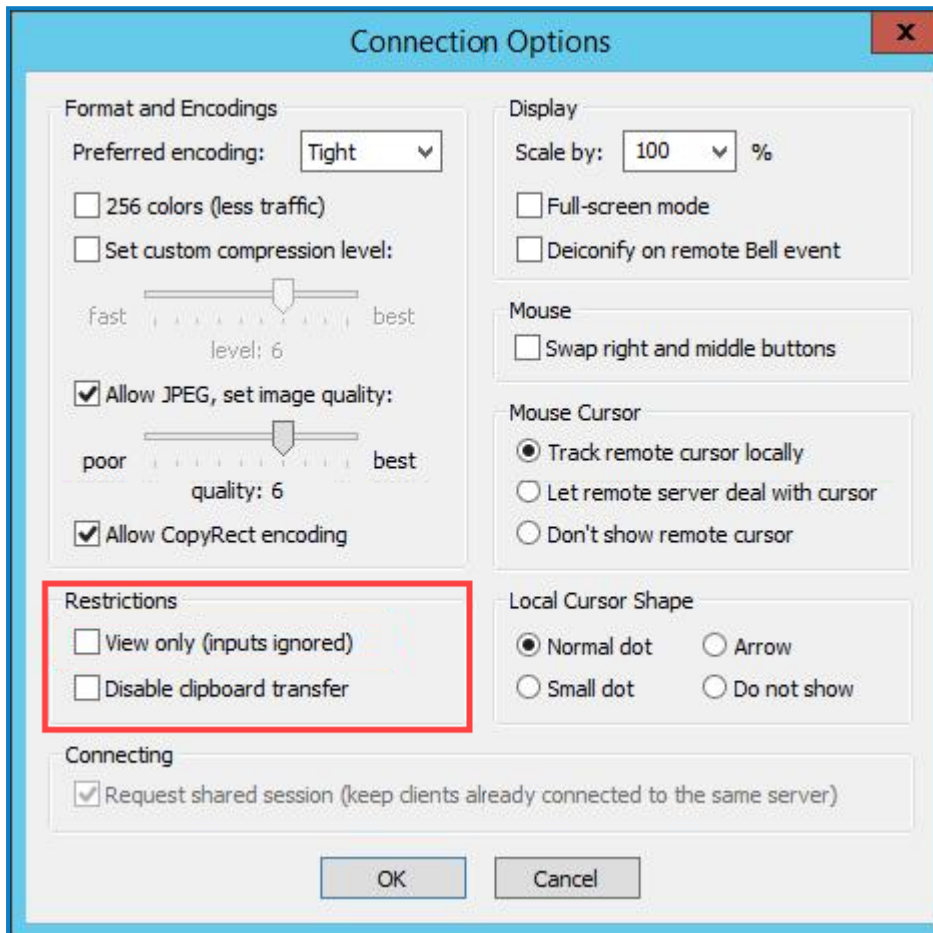
VNC Restrictions

You can apply the following restrictions on Digital Worker usage to ignore mouse and keyboard inputs, and prevent access to clipboards.

1. Click the connection button from the menu bar.



The Connection Options dialog displays providing access to the Restrictions options.



2. Apply the required restrictions:
 - **View only** – If you make sessions view only, any mouse and keyboard inputs are ignored.
 - **Disable clipboard transfer** – This option should be selected to prevent Digital Workers from attaching to your local clipboard, or other Digital Workers clipboards, causing confusion in the automation and leading to a potential system exception.
3. Click **OK** to save your settings.

Shutting down/closing open application

VNC should be treated like any other application, therefore when a system exception has occurred, Blue Prism recommends that you close all applications that are currently open on the Digital Worker’s desktop using the correct methods to log out and close applications. After closing all automation utilised applications, you should close the VNC window.

Accessing Blue Prism

Logging into Blue Prism

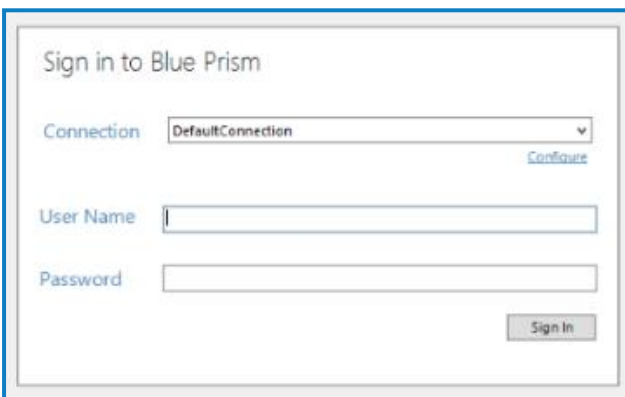
From the Management Server desktop, you can open the Blue Prism Cloud Digital Workforce application.

1. Double click the Blue Prism desktop icon.



Blue Prism launches and the Sign in screen displays.

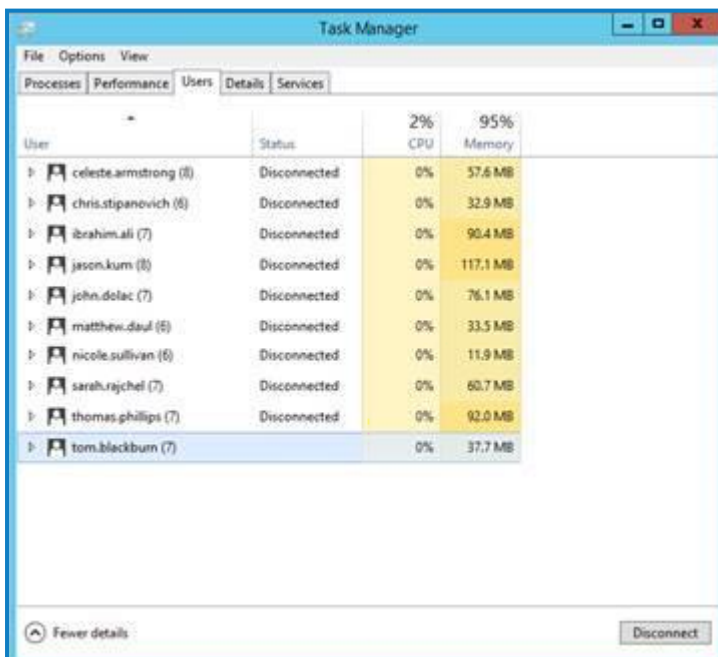
2. Enter your supplied credentials, (Blue Prism Cloud will provide the initial operator account).



3. Click **Sign in**.

Signing in and out of the machines

When a user logs onto the Management Server after they complete their work, they will need to log out of the machine, rather than just disconnect. If they simply disconnect their Windows account is still consuming CPU and memory resources.



Signing out

1. Select the Windows Button from the taskbar.
2. Click on your name from the top right of the screen.
3. Select **Sign Out**.

Force sign out a user

If you have administration privileges for the Digital Worker, you have the capability to sign a user out and terminate processes in a user's session. You should be aware that any unsaved work in a user's session will be lost if you forcibly sign them out. Blue Prism Cloud recommend that you try to resolve the disconnected session by contacting the user directly before forcibly signing them out.

To force sign out a user's session follow the steps below:

1. Open Task Manager.
2. Select the **Users** tab.
3. Right-click on a user.
4. Click **Sign off**.

To kill a process under a user's session:

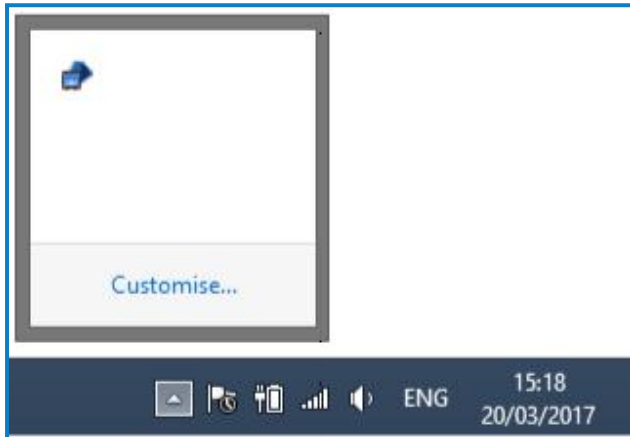
1. Open Task Manager.
2. Select the **Users** tab.
3. Expand the required user's node.
4. Right-click on a process;
5. Select **End task**.

Blue Prism Cloud Listener

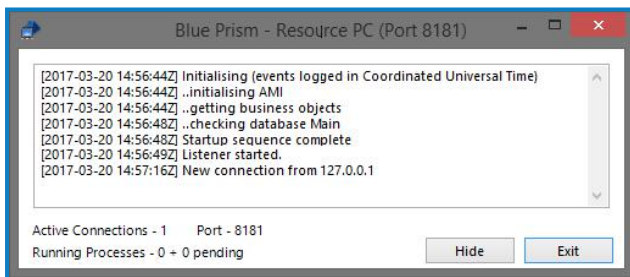
For the automation ecosystem to work, a listener is required to be running on the Digital Worker systems on an exposed port. This creates a symbolic link with the Management Server allowing the Management Server to use the machine as a Digital Worker as part of its digital workforce.

If the listener is not running on a Digital Worker, then the Management Server cannot communicate with the resource (Digital Worker) to initiate or control any automations.


To check if the listener is running on a Digital Worker, you can simply look at the icons in the taskbar on the Digital Worker's desktop to find the below icon – you can expand this list by clicking on the arrow.



If this icon is present, it would suggest that the listener is running on this Digital Worker. However, you should check that there are no obvious errors by right clicking on this icon and selecting **Show** from the context menu.



Here you can see no obvious error codes and the number of Active Connections is greater than zero. You can also check to see if a Digital Worker is ready to accept automations from the Blue Prism Control Room.

Available Resources			
Name	State	Members	Last Error
 LAP0001	Connected		

In the above image, we can see that our Digital Worker is connected, with no errors and has a highlighted blue computer symbol next to the name of the Digital Worker.

How to start the listener on a Digital Worker

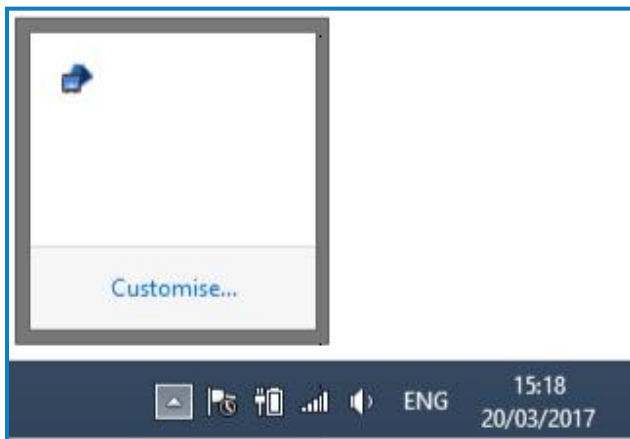
From the Digital Worker’s desktop, select either **Start Development Worker Listener** or **Start Production Worker Listener**.



The respective worker listener batch file should be in the start-up folder of the local virtual.worker account or dedicated Active Directory (AD) worker account where the automated process will be running on.

How to stop the listener on a Digital Worker

To stop the listener, right click on the icon from the below panel and select **Exit**.



Digital Worker maintenance

You should perform regular restarts of each Digital Worker machine. These can be at any frequency you wish – Blue Prism recommend restarting the Digital Worker as frequently as is viably possible.

Once a Digital Worker has been restarted, you will need to log into the virtual.worker account. These credentials will be provided as part of the handover package. Once the machine has been logged in, you should check that the [listener has been started](#). This is set to start automatically but should still be verified.

Logging

Logging is used to record each activity the automated solution completes when running. Logging is of great importance to help with debugging a solution. The session logs can hold valuable information to help you pinpoint what element of the automated solution is throwing the error. However, this may not be the root cause. Further investigation may be required and an attempt to re-produce the error while stepping through the processes will help diagnose the problem.


You can change the logging levels for each Digital Worker. To do this:

1. Navigate to **System > Resources > Management**.
2. Right-click on a Digital Worker and select **Logging Level**. From here you can see various logging levels and logging information.

For development of automations, you may consider selecting all stages. This will ensure that every stage is logged in the session log. Please be aware the more logging that is enabled, the more the session logs database table will grow. Blue Prism recommend that full logging is enabled within the development environment whilst developing and testing automations. Once it has satisfied UAT criteria and been migrated to production, the production Digital Workers should be set to a lower level of logging.


Credentials

The credential store holds all usernames and passwords for each system interacted with as part of automated processes along with extra credentials to help with the management of the process automations. Each Digital Worker will have its own set of usernames and passwords for each system. To view the credentials, select **System Manager > Security > Credentials**.

 Credentials may be different between the development and production environment.

Environment migration and release

When an automation has passed testing in the development environment it must be migrated to the production environment. Migrating the automations between environments requires a release to be created from a package.

 More information about releases and packages can be found in the [Blue Prism online help](#).

What is a package?

A package is a group of automation dependencies. These dependencies can be:

- Processes
- Business Objects
- Work Queues
- Calendars
- Environment Variables
- Credentials
- Tiles
- Dashboards

What is a release?

A release is a version controlled release of the package contents. Although we mention *version controlled* the system for controlling and versioning releases can be chosen using an appropriate naming convention of the release file.

Example

- Process A created in development environment
- Package called Automation of Process A created to include the dependency Process A
- A release of the Automation of Process A package is created and called - Automation of Process A - V1.0 - 160320170907
- The release Automation of Process A - V1.0 - 160320170907 is imported into Production
- Change request received to make a change to Process A
- Change implemented to Process A in development environment
- A release of the Automation of Process A package is created and called - Automation of Process A - V2.0 - 200320171030

Notice that another package didn't need to be created, but simply another release taken of the package. However, should Process A now require an additional object or other dependency as part of the change request the below may be followed:

- Process A created in development environment
- Package called Automation of Process A created to include the dependency Process A
- A release of the Automation of Process A package is created and called - Automation of Process A - V1.0 - 160320170907
- The release Automation of Process A - V1.0 - 160320170907 is imported into Production
- Change request received to make a change to Process A

- Change implemented to Process A in development environment
- Object X created and implemented within Process A
- The Automation of Process A package is modified to now include the additional Object X dependency
- A release of the Automation of Process A package is created and called - Automation of Process A - V2.0 - 200320171030

Creating a package

To create a package follow the steps below:

1. Navigate to the Releases section of Blue Prism.
2. Right click on the **Package Overview** option and select **New Package**.
The Create Package wizard displays allowing you to give the Package a name and description. The wizard will then allow you to Configure the package by included the relevant dependencies.
3. Click **Next** followed by **Finish** – you will be able to see that your package has been created with the selected contents.


Package, release, and version control recommendations

Environment backup package

It is always a good idea to have a package that contains all the dependencies in the whole environment (processes, objects, work queues, environment variables, credentials) etc.

This is for two main reasons:

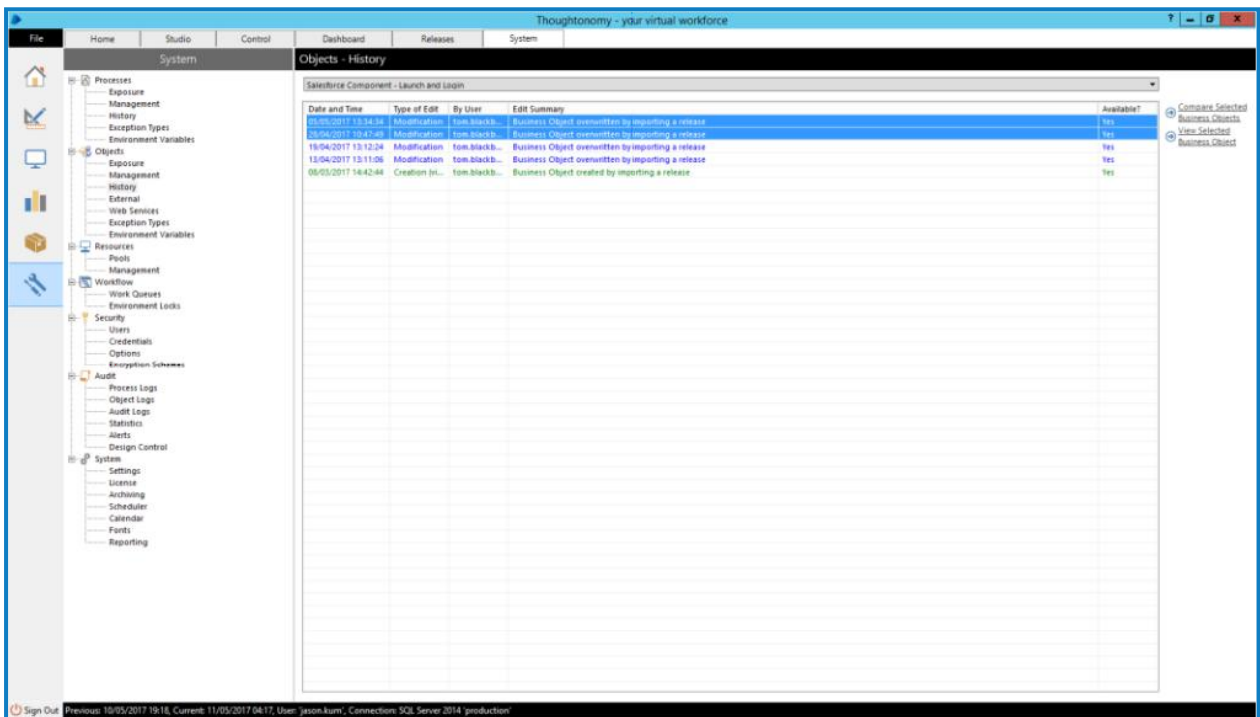
- Acts as a Disaster Recover backup for your automation environment.
- Can be used to help roll-back.

 For more information about backing up and restoring environments, see the [Blue Prism online help](#).

Rolling back

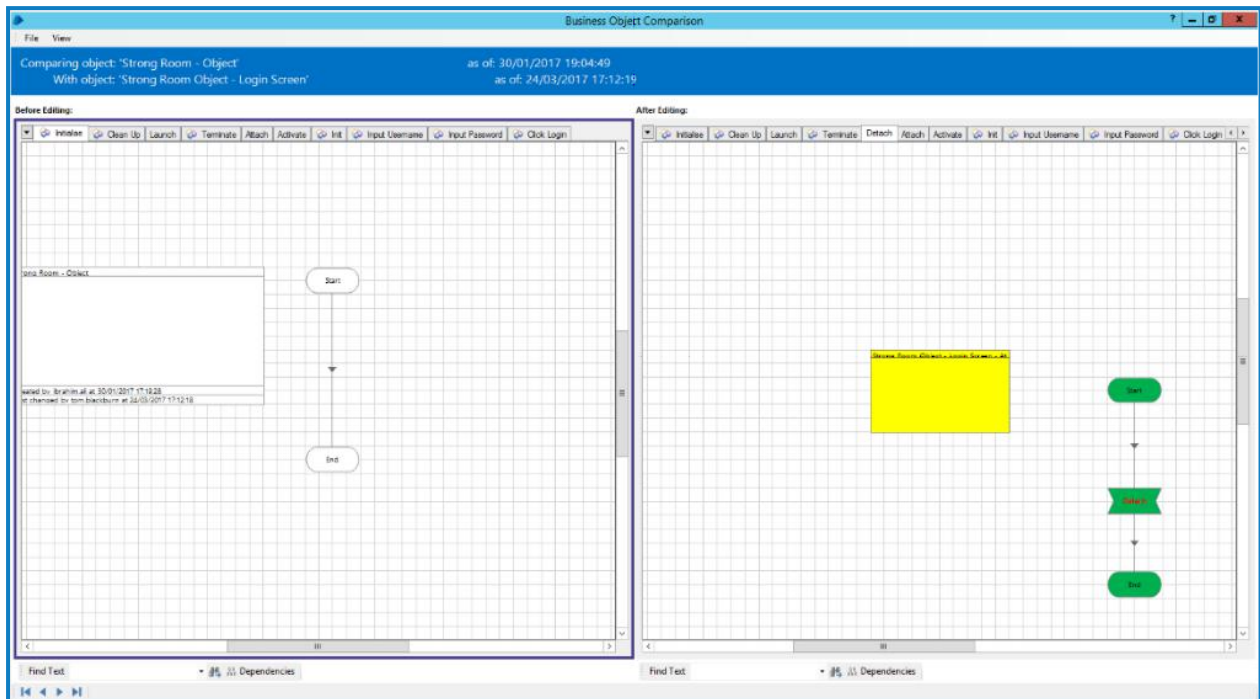
The rollback process for single objects or processes differs from that required to roll back a full release package. This is because you haven't taken a backup of the process prior to importing the later version. It is possible for you to export the current version of the process or object, prior to importing the later version, then roll back to the file if required. However, there is a facility in Blue Prism Cloud that allows you to export historic versions of an object or process, allowing you to re-import and overwrite the later version.

1. Navigate to **System > Object > History**.
2. Select the required object from the drop-down box. The history of edits to the object display along with the applicable edit summary and datetime stamp of when the edits were saved.
3. Hold **CTRL** and click on the top two edits (the latest two edits).



Selecting the top two edits will allow you to roll back to the previous version. You can select the top edit and any other edit within this list if you wanted to roll back multiple versions.

4. Select **Compare Selected Business Objects** from the right of the screen.
The Business Object Comparison screen displays.




Here you can see *After Editing* on the right, which is the current version of the object and *Before Editing* on the left which is the older version.

You can also see colour co-ordinated visual summaries – Yellow = Edit, Green = Addition, Red = Removal.

5. Select **File > Export Left Side**.

The export dialog box displays allowing you to export the older version as an XML file.

6. Save the XML to the required location.
7. Import the XML back into Blue Prism.
8. Ensure when prompted that you select to overwrite the current object with the newly imported object.

 The same can be done for processes by choosing **System > Processes > History**.

Migrating single objects and processes

Whilst you may consider migrating or exporting a single object or process in addition to migrating a release file, you may also consider migrating a single object or process in the form of an XML file. This method of migrating a single object or process is commonly chosen when there is ongoing development to the business process but a fix to a singular object or process is required to be migrated. As there is ongoing development work to the remainder of the process, it would not be logical to not migrate a whole release as this could have unforeseen impacts, but instead would be prudent to take the single file which includes the fix.

Other instances where a single object or process may be chosen to be migrated as a single XML file, are when there is ongoing development to a business process and a phased approach to fixes and/or enhancements is required. It is also important to note that if you are having issues with a singular object or process then this can be exported as an XML file and attached to an email to your development team or should you wish to contact Blue Prism Support.

Export a single object or process

To export a single object or process can be achieved for a variety of ways. The first and most straight forward is to export the object or process from the Blue Prism menu using the below steps:

1. Select **File > Export > Process** or **Object**. Select the relevant option for what you want to export.
2. Click **Next**.
3. Select an object or process and click **Next**.
4. Choose a destination to save the exported XML file to and click **Finish**.

Import a single object or process

Importing a single object or process is similar to exporting:

1. Select **File > Import** from the main menu.
2. Browse for the .xml file in your file system.
3. Continue through the import wizard.

Schedules

Schedules can be set to start automations automatically based on set times.

Start the process manually

There are a few ways to start a process manually. The most common is to drag a process onto a Digital Worker or drag a group of Digital Workers onto a process.

Stop the process manually

To stop a process, you can simply right click on the running session and choose either:

- **Immediate Stop** – Sends a signal to the Digital Worker to stop all automation activities regardless of where it is in the process. It will stop everything that it is currently doing and won't close any applications.
- **Request Stop** – The request stop action works in conjunction with a decision stage within the automation process. You can use a decision stage with the below content:

`IsStopRequested()`

This decision stage will then check to see if a user has requested the session to stop. Based on the findings, the process can be routed to close any open applications and softly end with no disruption.

Useful information

- The Digital Workers keyboard language needs to be set to English (United Kingdom) in the current form of the automation;
- If you RDP to a Digital Worker from the Management Server, this will log out the VNC session. Once you have disconnected from the RDP session, you will need to unlock the worker by logging back in through VNC
- If you decide to scale your digital workforce, you may consider making some of the below changes and configurations:
 - Ensure that applications and settings are configured consistently, including for example security settings, IE settings for trusted sites
 - Run through processes manually and through testing regimes. For example, this will outline the requirement to cache any application credentials, cookie settings or add pop-up blockers
- Interact and Hub when accessed from the management server displays a blank screen. This usually means the windows account you have logged into has incorrect Internet Explorer settings. These will need to be checked and changed as below:
 - a. Select **Settings > Compatibility View Settings > Display intranet sites in Compatibility View** (This should be un-checked);
 - b. Re-load the URLs and test again
 - c. The Internet Explorer setting on the management server will need to be adjusted per Windows account.

Support

If after performing your internal troubleshooting steps, you still require assistance via our Blue Prism Cloud Support team, please contact them with the below information to help with a timely and efficient response:

- Any applicable log file outputs from sessions or work queues
- Any applicable event log files from the relevant Orchestrator Server(s) or Digital Worker(s)
- Screen shots of any part of the process of concern
- Screen shots of any Digital Workers where errors are displayed, or application interaction is of concern
- Information regarding the troubleshooting steps taken and any areas you have already investigated
- An understanding of where you believe there is a problem in the automation

Providing a detailed support ticket query can help Blue Prism Cloud Support to provide you with a quick and effective response to help resolve your query.

To contact Blue Prism Cloud Support: cloudsupport@blueprism.com.