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Interact 2.7 to Interact 4.6 Migration Guide

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Contents

Introduction

This document details how to recreate Forms and Rules from Interact 2.7 in Interact 4.6.

Interact 2.7 was formerly known as Self-Serve and the form structure of that release is significantly different to the form structure in Interact 4.6. Interact 4.6 has significant enhancements over Interact 2.7, with many new features and functionality changes. As such, the difference in form structure between 2.7 and 4.6 prevents the automatic migration of forms.

This document provides guidance on equivalent features so that you can manually rebuild forms, rules, and related automation processes to help you take advantage of the new capabilities of Interact 4.6.

> This document is not intended to replace the Interact Plugin User Guide available in the Interact 4.6 online documentation, and users should ensure that they are familiar with all the functionality before following the processes in this document.

Basic form creation

The basic form creation in Interact 4.6 is very different to the form creation in Interact 2.7.

In Interact 2.7, forms were also known as 'Processes', this terminology was changed to avoid confusion when building automation processes based on a business process. Interact 2.7 forms were created, edited and deleted in the Processes Management section of Interact.

> It was not possible to delete a Form (Process) in Interact 2.7, they were only ever archived. Forms can be deleted in Interact 4.6.

Who can create a form

In Interact 2.7, forms were created by someone who had access to the 'administration' area of the application. The same level of control applies in Interact 4.6, only a user who has access to Hub and is assigned the Interact plugin will be able to create Interact Forms.

Form prerequisites

In Interact 2.7, a category had to be created before creating a form, to enable grouping of forms. For example, "Human Resources", or "Finance". This step is not required within Interact 4.6. In Interact 4.6, categories can be added at any point during the form creation process.

In Interact 4.6, a business process must be created in the Business Process plugin under Automation Lifecycle Management. There is a one-to-one relationship between a business process and an Interact form. Without a business process, you cannot create or import an Interact form.

Create a form

In Interact 2.7, the steps to create the form involved capturing some basic details, including the name, description of the form, which queue an item should be created in, an email address if you wanted a copy of the form submission to be sent via email, Prioritization and SLA, and specifics about icons.

In Interact 4.6, these fields exist when you are creating the form.

The images below compare the two creation methods, and the following table indicates the differences.

Interact 2.7

Interact 4.6

Interact 2.7	Interact 4.6	Notes
	Business Process	In Interact 4.6, a business process must exist before a form can be created or imported.
Name	**Name**	Same functionality.
Description	**Description**	Same functionality.
Queue	**Queue**	Similar functionality where you want the item added to a Blue Prism queue. In Interact 2.7, you select the queue name. In Interact 4.6, you can now connect to multiple Blue Prism instances. Select the **Queue** option and then select the required environment, queue name, and optionally, the priority and SLA.

Interact 2.7	Interact 4.6	Notes
Send Email	**Email**	Similar functionality. In Interact 2.7, items were always added to a queue. In addition, form submission details could optionally be sent to a provided email address. In Interact 4.6, items can be added to a queue, or sent to an email address, or both.
Supervision	**Default approval type**	In Interact 2.7, **Supervision** allowed a Form to be sent to a named approver before being submitted to a Blue Prism queue. In Interact 4.6, **Default approval type** has the same functionality but also provides you with a choice of sending it to either a single named approver, or to any approver within the role the form is assigned to. If **any approver** is selected, the **Exclude submitter** check box displays – this is selected by default and prevents the submitter from being able to approve their own form.
Priority and **SLA**	**Priority** and **SLA**	Same functionality. Although these fields are initially hidden in Interact 4.6 until **Queue** is selected as your delivery method.
User Groups	**Interact role** **(roles are created by a Hub administrator using Hub > Settings > Roles and Permissions)**	In Interact 2.7, **User Groups** allowed you to select a predefined group of users who could access the form you have developed. In Interact 4.6, **Interact roles** allow you to select the roles (which contain a predefined group of users) who can access the form you have developed. More than one role can be assigned to a form. It is advisable to leave this field blank whilst creating the form. Once the form is finalized, you can edit the form details and complete this field to publish the form. > The roles are managed under Roles and Permissions by a user with Hub administrator privileges. This enables specific Interact roles to be created that define the users that can access the associated forms.
Process Icon	**Icon**	Same functionality. In both versions, an icon can be uploaded to represent the form or one of the predefined icons can be used. In Interact 4.6, there are many more predefined icons grouped into different categories.

Forms with multiple pages

The ability to create a form with multiple pages still exists. In Interact 2.7, the additional pages were referred to as Tabs. In Interact 4.6, these are referred to as Pages.

These can still be hidden and made visible depending on a rule and a value set in an associated field.
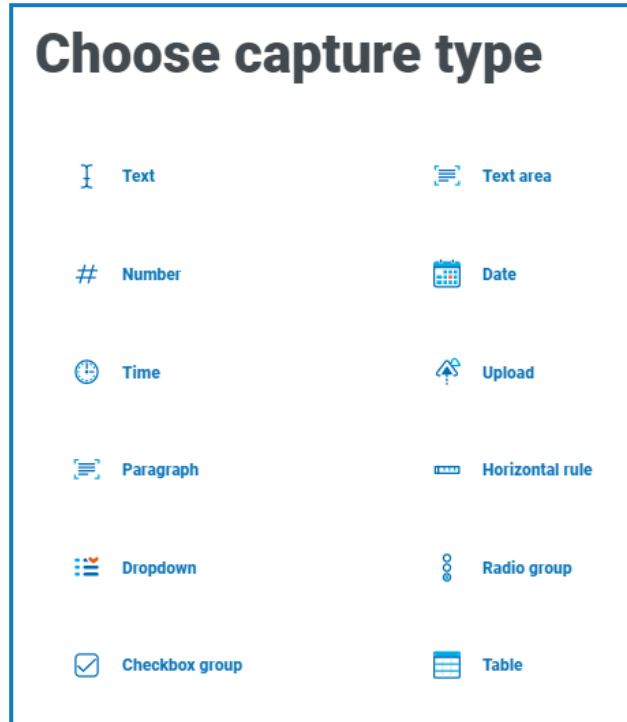
Form element types

The form elements are the different element types that can be used to create the structure of the form.

Elements can be hidden, made visible, set to optional or mandatory as required. This ability is the same between Interact 2.7 and Interact 4.6.

Interact 2.7
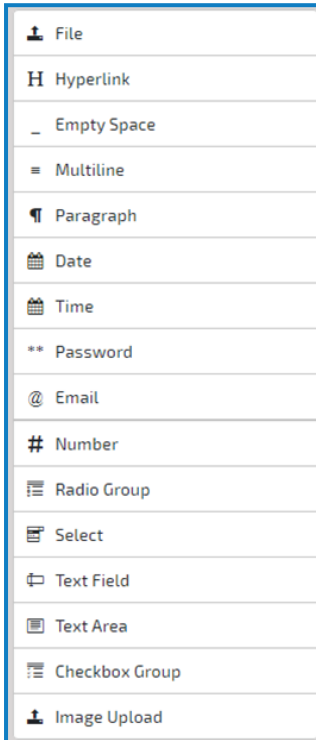
Interact 4.6

The table below lists the form elements for Interact 2.7 with the equivalents in Interact 4.6. Where there are differences, these are detailed in the Notes column.

Interact 2.7	Interact 4.6	Notes
File	**Upload**	The file element now forms part of the Upload element.
Hyperlink	Use **Paragraph**	No direct replacement. In Interact 4.6, use the **Paragraph** element. This includes a link option in the formatting toolbar, enabling you to enter a hyperlink.
Empty Space	**Horizontal rule**	
Multiline	**Table**	
Paragraph	**Paragraph**	
Date	**Date**	Interact 4.6 supports three different formats: UK, US and International date formats.
Time	**Time**	
Password	Use **Text**	No direct replacement. In Interact 4.6, use the **Text** element and the **Mask data on entry** feature.

Interact 2.7	Interact 4.6	Notes
Email	Use **Text**	No direct replacement. In Interact 4.6, use the **Text** element, in conjunction with regular expressions, to perform this task.
Number	Number	
Radio Group	Radio group	
Select	Dropdown	
Text Field	Text	In Interact 4.6, the **Text** element supports both simple and complex regular expressions allowing the input to be controlled in line with specific requirements.
Text Area	Text Area	
Checkbox Group	Checkbox group	
Image Upload	Upload	The **Image Upload** element now forms part of the **Upload** element.

Each element is listed in the Interact Plugin User Guide with details of each element type and the associated options.

> Field validation has been extensively enhanced in Interact 4.6. For more information, see the Interact Plugin User Guide.

For example, within the Text element, regular expressions can be used to control the input from a user of the Interact form. These simple controls can be used to restrict characters used, or to specify the minimum or maximum number of characters. Or alternatively, by switching to regular expression within the Text element type, regular expressions can be structured to ensure that the data entered by a user is always in the required format.

Rules

In Interact 2.7, rules were based on an 'If-Then' construct. They could be used to make visible fields that were set initially as hidden, for example:

In Interact 4.6, the same ability exists, but it has been enhanced to support not just manipulating fields and pages but also to change the form depending on who the submitter (user) of the form is.

The example below illustrates that if the submitter is 'Marion Smith', then the 'Payroll Details' field is hidden:

In Interact 4.6, rules functionality has been expended to provide more flexibility, making more types of rules available for certain fields. A full list of the rules logic and the applicable 'If-Then' constructs for each element type can be found in the Interact 4.6 online documentation.

> As additional rule functionality is available in version 4.6, it is recommended that existing forms are reviewed to see if they can be re-engineered to take advantage of the new rules.

Deploying forms

The process for deploying forms is largely unchanged other than differences in the user interface, however, Interact 4.6 also has an additional option which enables the form designer to deploy the form to an existing Interact role. Form deployment is initiated by:

- A user with Hub administrator privileges – deployment is initiated from:

    - In Interact 2.7 – select **Users, Roles and Registration Approval** from the settings cog.

    - In Interact 4.6 – click your profile icon and select **Roles and permissions**.

    The process in both versions is completed by selecting or creating an Interact role and adding the appropriate form and user(s).

    Alternatively, a Hub administrator can also use the same deployment method as the user below.

- A user with access to the Interact plugin, without Hub administrator privileges – deployment is initiated from:

    - In Interact 2.7 – no deployment mechanism for the user.

    - In Interact 4.6 – click **Options** next to the required form and click **Edit basic information**, then select one or more roles from the **Interact roles** drop-down list and click **Save**. The user can only select existing Interact roles, they cannot create a new role.

    > This field also displays on the Create form page (see Basic form creation on page 5), however, it is recommended that the field is not completed until the form is finalized ready for deployment. Once a role is selected, the form will be instantly available to the users in that role.

Form submission and data retrieval

To an end user, the Form submission process appears no different between Interact 2.7 and Interact 4.6. However, in Interact 4.6, there are now other services involved but the concept of submission and drafts remain identical between the two versions.

The retrieval of the data from the queue is also performed in the same way using the Get Next Item action from the Work Queues object.

In Interact 4.6, this will retrieve a collection that you can extract data from, the same as Interact 2.7. The same data item of '_requestId' exists so that you can track and follow the submission number of the form.

In addition, in Interact 4.6, the '_SubmitterDetails' sub-collection is available in the retrieved item from the queue. This sub-collection contains the details of who submitted the form and can be used with automations if needed. For more information, see Submission in the Interact Web API Service guide.

Within the Interact Remote API for Interact 4.6 there is also a Get Submission action that can be used to retrieve the data item details from the queue. This performs the same task as the Get Next Item action, however you need to know the submission number (_requestid) before using this action.

Interact Controller

The Interact Controller for Interact 2.7 had limited capabilities. It could update defined field values within forms, but did not support the creation and raising of forms. Any automation processes that used the Interact Controller to send updated data and submitted forms back to Interact will need to be reviewed and updated as a result of the transition to Interact 4.6.

In Interact 4.6, the Controller is now referred to as the Interact Remote API, it has many new features and functions that allow developers to create submissions by a digital worker, raise a submission for a user to review and update before submission, as well as the traditional updating of form field values.

There is one important change that will impact developers, which is combining rules and the Interact Controller:

- In Interact 2.7, it was possible to have a page or field hidden and visibility of that page/field to be controlled by the value entered into a field. The rule could be triggered via the Interact Controller by setting the value using a digital worker. When the user then reviewed the submission, that page/field would become visible.

- In Interact 4.6, this has changed. There are specific actions within the Interact Remote API that can be used to unhide a page/field.

Additionally, Interact 4.6 has been improved to provide users with a better view of submissions in a different status:

- In Interact 2.7, there were three views to manage the submissions: draft, submitted, and archived.

- In Interact 4.6, those views still exist with the addition of: Inbox, Awaiting Approval, and Approvals.

Submitted Forms can be moved between the views using the Interact Remote API. The Inbox is used when raising submissions for a human worker to review before final submission. The Awaiting Approval and Approvals tabs control the approval process, which itself has been improved in Interact 4.6 – notifications are sent to approvers to notify them of a form requiring approval before submission.

A further feature introduced in Interact 4.6 is the use of 'dynamic' forms. To improve the human and digital worker collaboration further, Interact enables forms to be updated. This functionality can be used in conjunction with the Raise Submission action, where a digital worker will create a new submission and send it to a user's Inbox. The user can then update details in the submission and submit the form back to the digital worker. Based on the information entered by the user, the digital worker can manipulate the form in the user's Inbox, unhiding fields or pages to enable more details to be collected. This can be repeated as required to gather information depending on selection criteria.

Full details on the use of the Interact Remote API can be found within the online documentation.

Further improvements

Auditing

For Interact 4.6, auditing capabilities have been moved to the Audit area of Blue Prism Hub.

For more information, see Auditing in the Blue Prism Hub 4.6 documentation.

Themes

For Interact 4.6, themes have been simplified. The color setting for individual components has been removed and instead, administrators can now select an overall color and logo for a theme.

For more information, see Customization in the Blue Prism Hub 4.6 documentation.