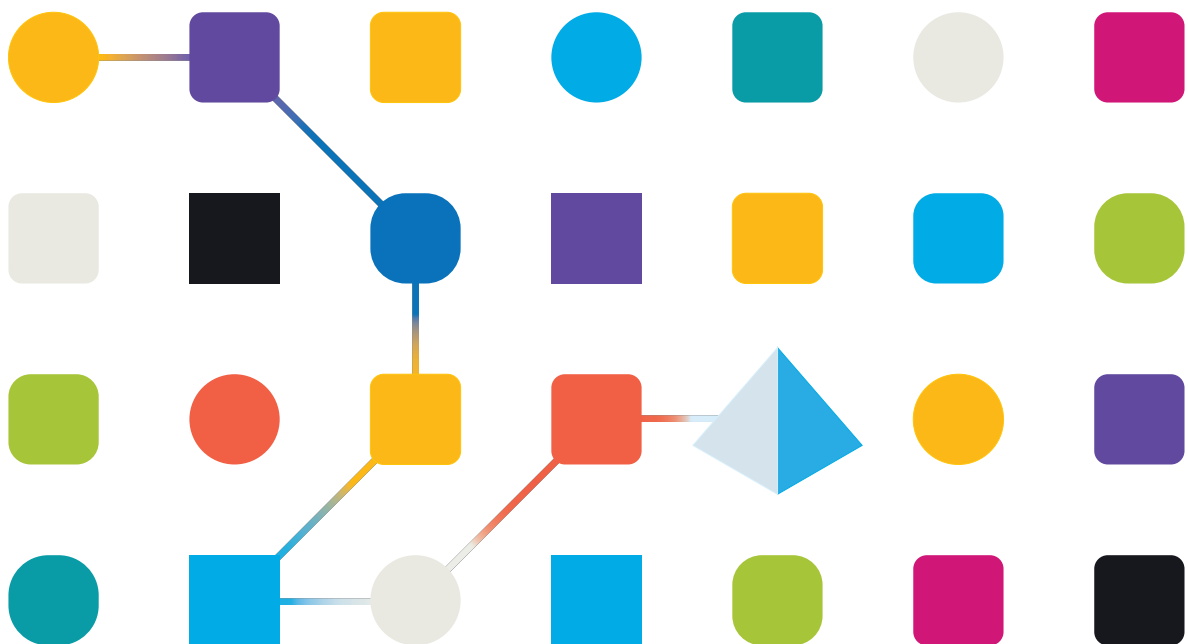




Automation Lifecycle Management 3.0

User Guide

Document Revision: 1.0



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Automation Lifecycle Management (ALM)

This section covers Automation Lifecycle Management (ALM), a plugin within Hub which is part of the Blue Prism Cloud platform. This guidance relates to the following releases of the Blue Prism Cloud product:

- Release 3.0 of ALM is the standalone version released in February 2020; and
- Release 4.0 of ALM is the on-premise variant released in August 2020.

This guide outlines functionality and usage of the Automation Lifecycle plugin. By utilizing ALM, business analysts can capture and document the business process definitions along with the applicable applications and any business exceptions. It is assumed as part of this guide that the user is familiar with Blue Prism Cloud digital workforce and has experience with components such as Hub and Blue Prism.

Overview

The Blue Prism Cloud digital workers provide an unparalleled skill and capability set, with further use cases being addressable with each new release. Whilst capability is important, Blue Prism Cloud have paid equal attention to the usability during the delivery cycle, ensuring enterprises are provided with guard rails to ensure best practices are met. The Robotic Process Automation (RPA) and Intelligent Automation (IA) industry has a multitude of methodologies and operating models however these are contained in documents and training materials only. With the development of Blue Prism Cloud's Automation Lifecycle Management (ALM) capability within Hub, enterprises early on in their RPA/IA journey can benefit from application driven controls to ensure the key milestones of a successful delivery are met. ALM will provide the functionality below:


- Business Case Creation
- Process Identification
- Process Documentation*
- Exception Tracking*
- Automation Design and Development*
- Process Sign-off and Approval*
- User Acceptance Testing Management
- Release / Change and Operational Management

The Automation Lifecycle plugin available for Hub provides a framework for the above functionality to be managed.

Only the items marked with an * are available in the first release. Additional functionality will be provided for future release of the Blue Prism Cloud platform.

Installation and access

To access Automation Lifecycle Management (ALM) the Automation Lifecycle plugin must be installed by an administrator.



Automation Lifecycle

Automation Lifecycle Management (ALM) enables you to manage your delivery ecosystem with ease. Create PDD's, define exceptions and applications, manage access permissions.

Dependencies:
Connect.Core [3.0.9,)
Connect.Core.Data [3.0.9,)

Installed version
3.0.9 | No Notes

Once the plugin has been installed it needs to be added to a role and a user then assigned to that role. The plugin can be assigned to the default user role if required or a custom role can be created.

Edit Role

Basic

Users

Plugins or Forms

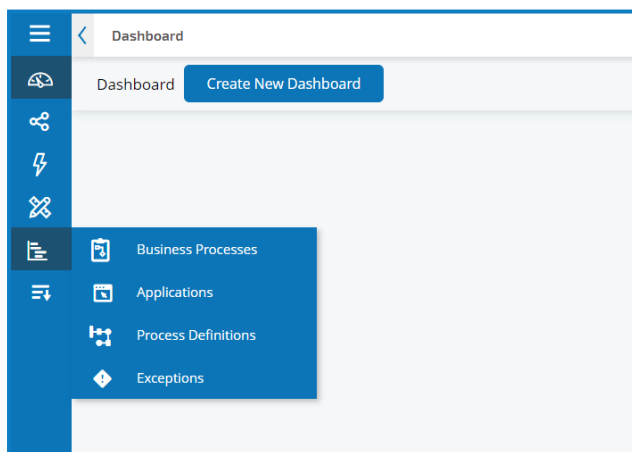
Add plugin

Automation Lifecycle

Cancel

Save

The full functionality of ALM is accessible through the Automation Lifecycle menu from the sidebar menu.



The following options are available:

- Business Processes;
- Applications;
- Process Definitions
- Exceptions.

All the options under the Automation Lifecycle menu leverage the same table customization options as with other Hub plugins. This include items such as changing the columns being displayed, hiding filters and saving and retrieving stored views. These are all accessible through the settings cog on each option page.

The typical flow through the Automation Lifecycle Management functions is as follows:

1. Identify the organization's business processes and determine whether they are suitable candidates for automation.
2. Capture the applications that these processes use.
3. Define the process using Process Definition.
4. Capture the low-level steps of the process.
5. Exceptions that may apply to one or more of the Business Processes is performed.

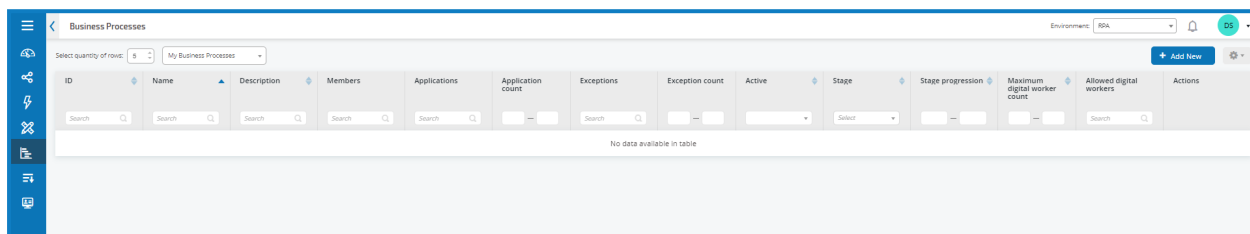
Though this is a typical flow, once several items have been captured and defined, ALM allows the reuse of parts of a process. This means that common elements can be defined as templates and reused as required. For example, the login process into say Salesforce is the same whether you are creating a new user or creating a new account. Therefore, the defined process steps for *Login to Salesforce* can be defined as a template and used in both processes.

Business processes

The Business Processes option allows you to define the business processes within your organization.

Add a business process

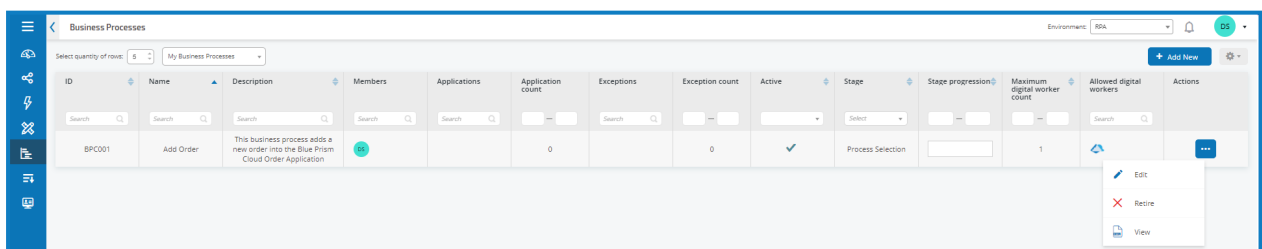
1. Select the Business Process tab and click **Add New**.



2. The Create business process dialog displays.

A screenshot of the 'Create business process' dialog. The dialog has three tabs: 'Basic', 'Members', and 'Notes'. The 'Basic' tab is selected. It contains the following fields: 'ID *' with a text input and a copy icon; 'Name *' with a text input; 'Description' with a text area; 'Stage' with a dropdown menu showing 'Process Selection'; and 'Stage progression' with a progress bar at 0%. A 'Next' button is located at the bottom right.

3. In the Basic section add the required basic information about the business process:
 - **ID** – A unique number to identify the Business Process. Companies can define their own identification system which could assist in identification of processes for different departments, e.g. Finance, Sales, etc. or just a unique identification across the organization's processes generally.
 - **Name** – A name for the business process.
 - **Descriptions** – An optional description of the Business Process.
 - **Stage** – The stages involved in capturing the Business Process:
 - Process Selection, (default option)
 - Deep Dive
 - Design
 - Development
 - Internal UAT
 - External UAT
 - Live Proving
 - Live
 - **Stage Progression** – A slider that allows you to set the how much of the stage has been completed as a percentage.
4. Click **Next**.
5. In the Members section add any key stakeholders that will contribute towards the automation of the business process throughout the lifecycle. If you create a business process you will be automatically added as a member.
6. Click **Next**.
7. In the Notes section add information about the business process. Only the person who created the Business Process will have write privilege, everyone else will only have read privileges.
8. Click **Save**.
9. If the save has been successful, a notification displays in the top right corner. Once the data has been added it can be viewed, edited or retired using ellipsis that displays for each added business process.



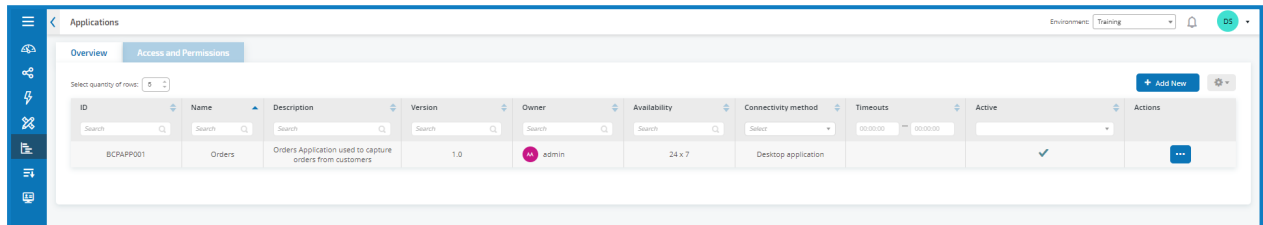
10. The list can be filtered to show all existing business processes or only those that the logged in user created.

Applications

The Application tab for Automation Lifestyle Management (ALM) allows the definition of applications and their access and permissions attributes.

Add an application

1. Select the Application tab and click **Add New**.



2. The Create Application dialog displays.

Create application

ID*

Enter ID

Name*

Enter Name

Description

Enter Description

Version

Enter Version

Owner

Select Owner

Availability

Enter Availability

Connectivity Method

Select Connectivity Method

Timeouts

00:00:00

Cancel

Save

3. Complete the following fields:

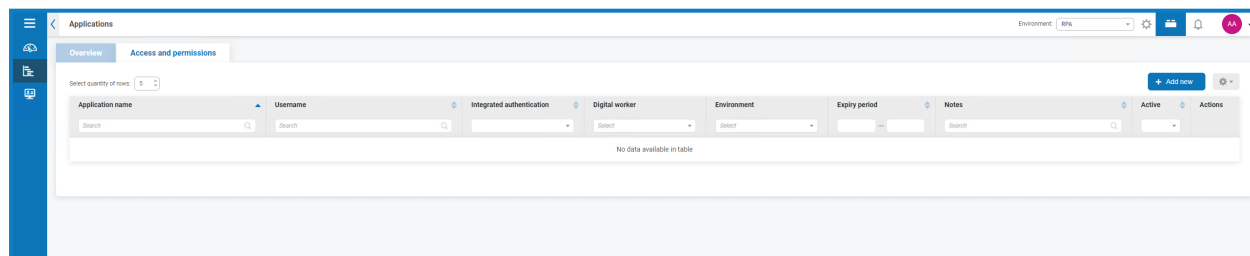
- **ID** – A unique number to identify the Application. Companies can define their own identification system which could assist in identification of applications within different departments, e.g. Finance, Sales, etc. or just a unique identification across the organization's applications generally.
- **Name** – The application name.
- **Description** – An optional description of the application.
- **Version** – The version number of the application.
- **Owner** – The person in your organization responsible for the version deployed and in operation. This could be the Finance Director for applications that are specific to the Finance team and not just an individual who oversees IT.
- **Availability** – The availability of the application. You could set the application to be constantly available or limit its availability to a specific day and/or time. For example, only between 09:00 to 17:30 on business days. This can be used to ensure that backups and maintenance periods are included in the definition of the application.
- **Connectivity Method** – The method of access for the application. Options include:
 - Web Access (Internet Explorer)
 - Web Access (Chrome)
 - Desktop Application
 - Citrix (Application)
 - Citrix (Desktop Application)
 - Remote Application
 - Remote Desktop Application
- **Timeouts** – The period of time after which the application will timeout and exit if unused.

4. Click **Save** to store the information in the Hub database. A notification displays to confirm a successful save and the application is added to the list in the Application tab.

Use the ellipsis for the required row to edit or retire an application from the list.

Pressing Save, stores the information into the Hub database and a popup in the top right corner will confirm success. Once the data has been added it can be edited or retired by using the menu alongside the Application.

Once an application has been added the Access and Permissions tab can then be used to define access rights. To navigate to Access and Permission select the Access and Permission tab.



Like the other forms, selecting **Add New** provides you with the options as detailed below:

- **Application Name** – allows you to select a defined application;
- **Integrated Authentication** – if Single Sign-On is enabled for the digital workers then this option should be ticked. This will enable the digital worker to directly authenticate inside the application without the need to complete username fields;
- **Environment** – allows you to select the environment that the credentials apply to, i.e. Production, Development, etc.;
- **Digital Workers** – this allows you to select the digital workers that will be accessing the application;
- **Expiry Period** – is the period defining the frequency that the password is updated. Most organizations utilize Active Directory and Group Policy to define a password expiration date, this field is used to notifying the password expiration period;
- **Notes** – this field allows the user to capture any additional information relating to the application access or permissions.

Create application access

Application name *

Select Application name

☐ Integrated Authentication

Username *

Enter Username

Digital Worker *

Select Digital Worker

Environment *

Select Environment

Expiry Period (in days) *

1

Notes *

Enter Notes

Cancel

Save

For the On-premise version of the product the Access and Permissions capability is non-operational. This functionality will be re-introduced in a later version.

Process definitions

The Process Definitions option under ALM allows the creation of electronic versions of the Process Definition Document (PDD) and their attributes.

A Process Definition is a document, whether a physical document or an electronic version, that describes in detail a business process. A Process Definition Document (PDD) should consist of the following:

- A summary of what the overall process and solution is;
- Definitions of unique language used within the business process;
- Scope and expectations as to what the automation should achieve;
- Volumes, how many instances of this task are going to be ran each day;
- Interact design to dictate what the solution would visually look like;
- A list of applications that your automation will interact with as well as their versions;
- A high-level process map of what the goal is;
- Low level steps, keystroke level details of the process;
- Inputs, triggers and outputs relevant to the automation; and
- Exceptions, what varying scenarios should you expect and handle.

The Process Definition is the core tool for the automation developer role, its accuracy and consistency will mean the difference between an average and great automation so ensure the information is complete before starting your work. The build of an automation shouldn't commence without a process definition and so Blue Prism Cloud emphasizes the importance of this document.

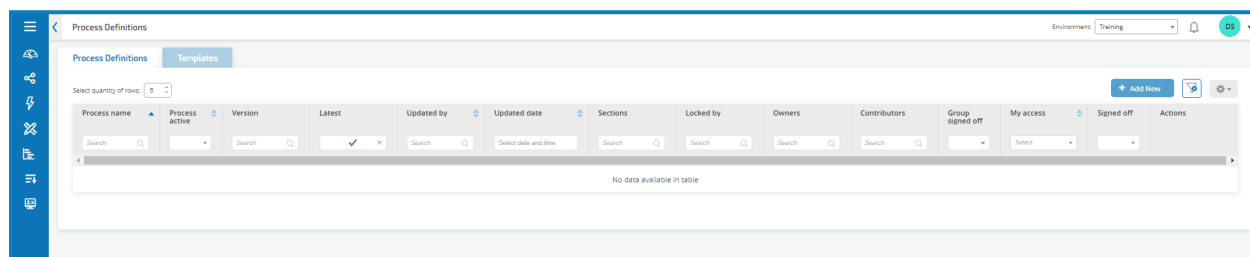
In the process definition section of ALM the following attributes for a process definition can be collected:

- **Process name** – Name of the Process Definition, the name is inherited from the Business Process.
- **Process active** – Based on whether the Business Process is active. If it is then this value would have a tick, else, it would have a cross.
- **Version** – The version number of the Process Definition.
- **Latest** – This column by default is filtered by latest, by not filtering by latest, all previous Process Definition versions will be on display.
- **Updated by** – Who was the last user to update the Process Definition.
- **Update date** – The latest date the Process Definition was updated.
- **Sections** – Different sections that make up the Process Definition.
- **Locked by** – User who currently has the Process Definition “open”.
- **Owners** – List of users who are owners of the Process Definition.
- **Contributors** – List of users who are contributors.
- **Group sign off** – Have all required members signed off the Process Definition. If so, there will be a tick, else, a cross is displayed.
- **My access** – The access the users have on the Process Definition.
- **Signed off** – The sign off status (hyphen – do not need to sign off, cross – have not signed off, tick – signed-off).

Versioning

Versioning is the method used by Blue Prism Cloud to manage the creation and management of multiple releases of process definitions. As they are developed, improved, upgraded or customized users can save versions to capture versions at particular points in time.

There are two versions levels, minor and major versions. A minor version of the process definition is captured every time you save the document. Only an owner/contributor can update to the major version. This would be used typically when a milestone has been reached and the process definition is being sent for review. More details on versioning are included in [Process Definition Sign-off](#).



The remove filter icon, next to the Add New button removes the default setting of the Latest flag. By default, the Latest field is ticked and only the latest versions of each process definitions displays. Earlier versions are hidden to provide a clean view. Users can either select the Remove Filter icon or change the status on the Latest column to see previous saved versions.

Add a process definition

1. Select the Process Definition tab and select **Add New**.

The Create process definition dialog displays.

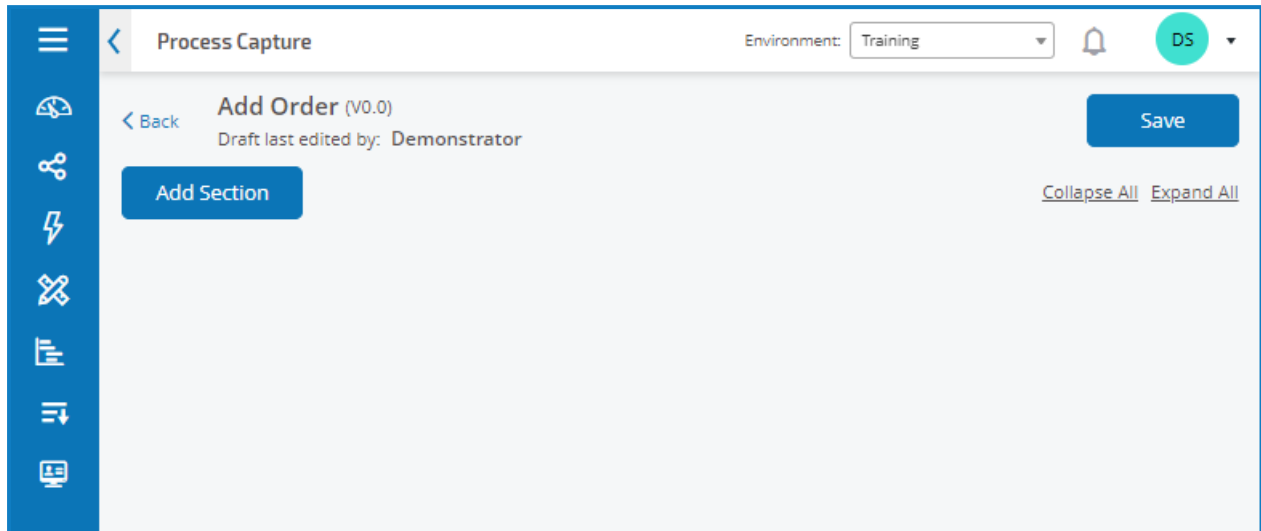
2. Select the following tabs to add users appropriate to each level of access:

- **Owner** – With this level of access you can read, write, delete and initiate sign-off of the Process Definition. The user who created the Process Definition will automatically be given Owner rights. In detail they can perform the following:
 - **Edit Definition** – allows the user to edit the Process Definition, if it's not locked by another user.
 - **Increase Major** – allows the user to increase the major version of the Process Definition.
 - **View** – allows the user to view the Process Definition, you will not be able to edit the Process Definition in this mode.
 - **Edit Access Control** – from here the user can alter the access privileges of different members. Members are aware of their access change via a notification.
 - **Sign off Options** – this will give the user three options:
 - **Submit for sign off** – Sends a notification to members letting them know that they need to sign-off on the PDD.
 - **Redact Sign-off** – Owner can redact the sign-off.
 - **Member Sign off** – View the different members who have and have not signed off.
 - **View Update Note** – Allows the user to see the latest update note, date it was updated and the user who updated.
 - **Delete** – Reverts the Process Definition to the previous version.
- **Contributor** – With this level of access you can read, write and delete the PDD. In detail:
 - **Edit Definition** – Allows the user to edit the Process Definition, if it's not locked by another user.
 - **Increase Major** – Allows the user to increase the major version of the Process Definition.
 - **View** – Allows the user to view the Process Definition, you will not be able to edit the Process Definition in this mode.
 - **View Update Note** – Allows the user to see the latest update note, date it was updated and the user who updated.
- **Viewer** – with this level of access the user can read the PDD. In detail the user can:
 - **View** – Allows the user to view the Process Definition, you will not be able to edit the Process Definition in this mode.
 - **View Update Note** – Allows the user to see the latest update note, date it was updated and the user who updated.

Access control can be updated at any time.

4. Click **Save**.

The initial version of the Process Definition is displayed.



Sections

A section is a group of steps that describe a combined part of the process, for example the 'Login steps' into an application. Using this structured approach enables the users to create 'reusable' sections which can be stored as Templates and reused in other Process definitions. More on Templates later.

Add sections to a PDD

1. From the Process Capture screen of a PDD, click **Add Section**.

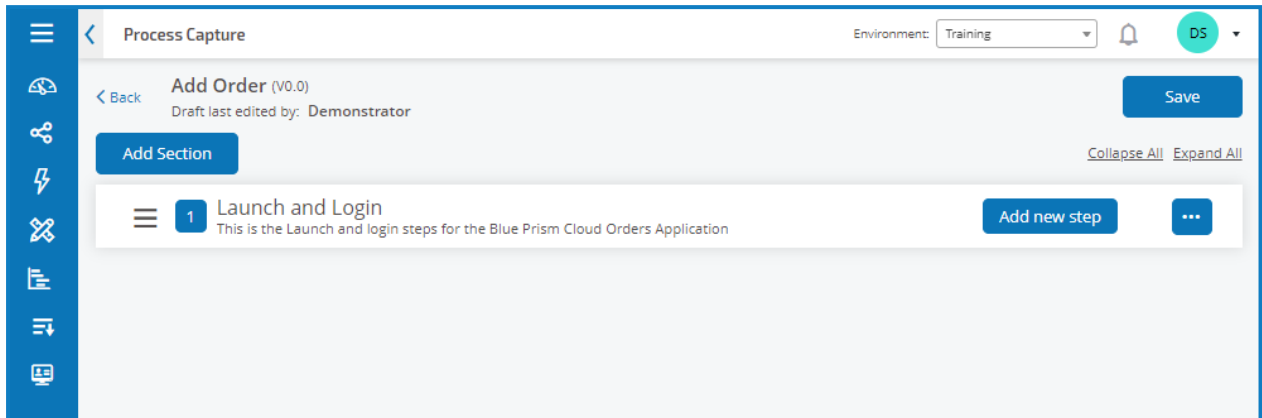
The Create Section dialog displays.

A screenshot of the 'Create section' dialog box. It has a title bar with a close button. Below the title bar are two tabs: 'New' (selected) and 'Template'. The 'Name' field is labeled 'Name *' and contains the placeholder 'Enter Name'. The 'Description' field is labeled 'Description' and contains the placeholder 'Enter Description'. Above the description field is a rich text editor toolbar with icons for bold (B), italic (I), underline (U), highlight (yellow), and text color (A). At the bottom right of the description field, it says '500 Characters remaining'. At the bottom of the dialog are three buttons: 'Cancel', 'Create another' (with a checkbox), and 'Save'.

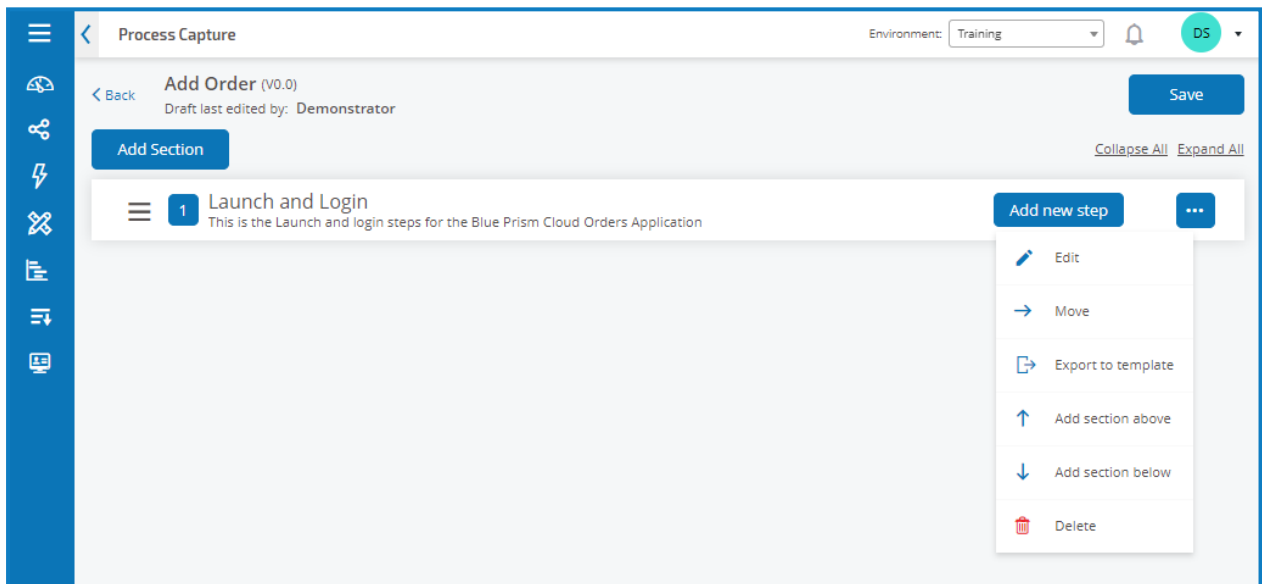
2. Enter a name and an optional description of the section being created.

3. Click **Save**.

The section is added to the Process Definition.



The context sensitive menu (three dots) allow you to edit the information provided, add sections above or below, delete or export to a template.



4. Repeat this process to add further sections.

Steps

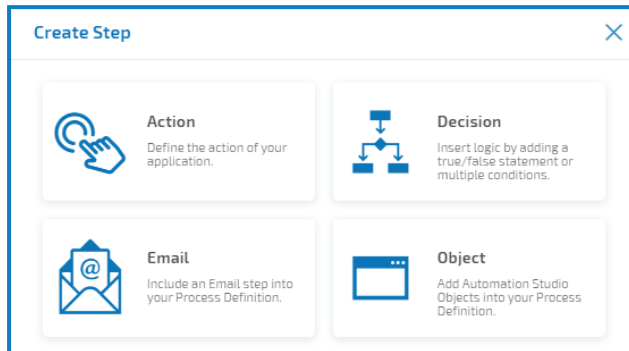
Steps are the tasks that the human worker would undertake to perform the business process. They are the actions, for example, input username, input password, click login button, and then a decision to check that the credentials were correct. There are four types of steps that we can use, these are:

- **Action** – This allows you to define an action for your application. These include: Input, Read, Select, Launch, Close, Drag and Drop, Click, Double Click, Right Click and Terminate.
- **Decision** – This allows you to insert true/false or multiple conditions.
- **Email** – This allows you to include an email step within your process.
- **Object** – This allows you to add Blue Prism Object to your Process Definition.

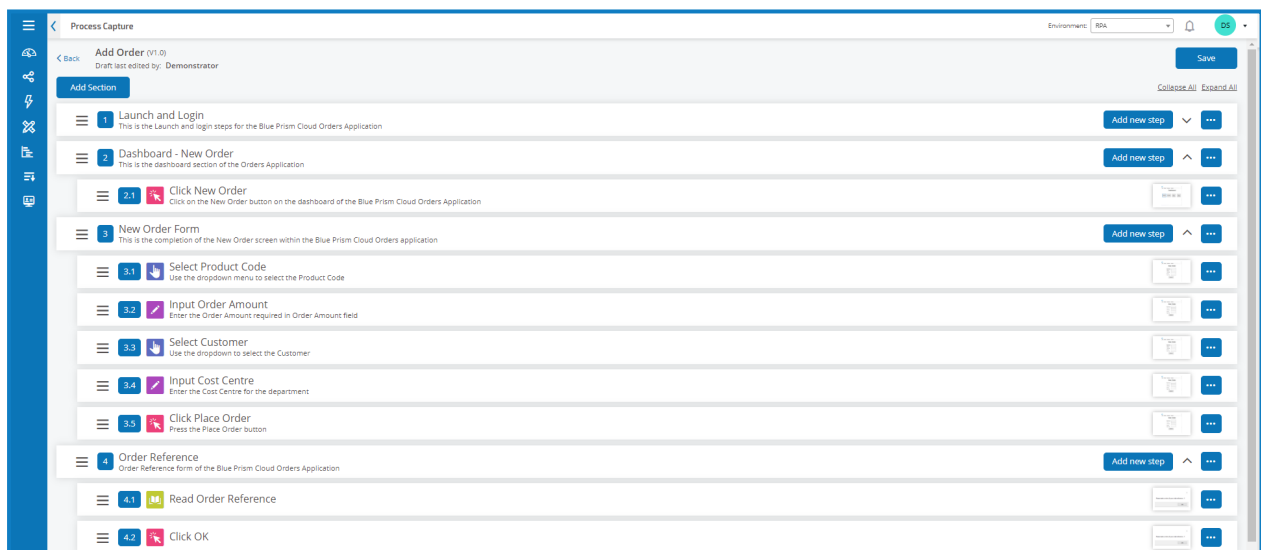
Add steps to a PDD

1. From the Process Capture screen of a process, click **Add New Step**.

The Create Step dialog displays.



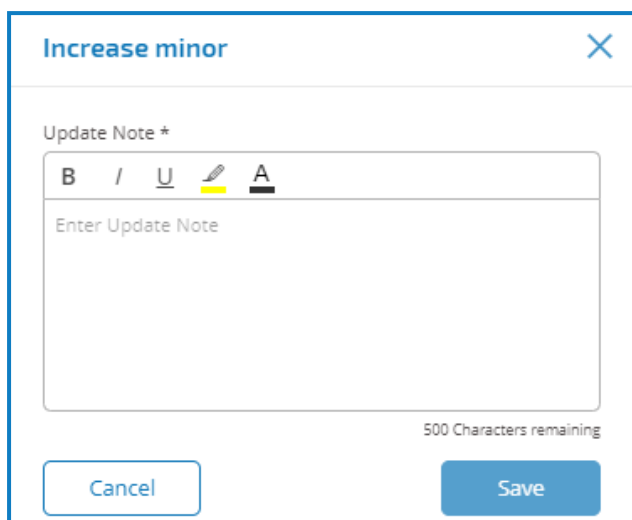
2. Select the required step type:
 - Action
 - Decision
 - Email
 - Object
3. Configure the step.
4. Add and define all the required steps until you have built up the complete process.



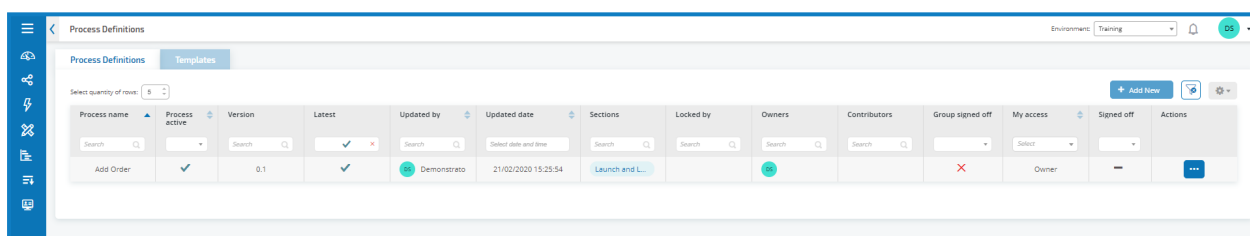
The final step in a business process must be the steps required to exit the application and the final step needs to include a route to End.

5. Click **Save** to create a minor version of the process definition. See [Versioning](#) for further information.
The Increase minor dialog displays.

6. Enter a description to remind you where you are up with the process and click **Save**.



The Process Definition screen displays, updated to show the latest version of the process definition.



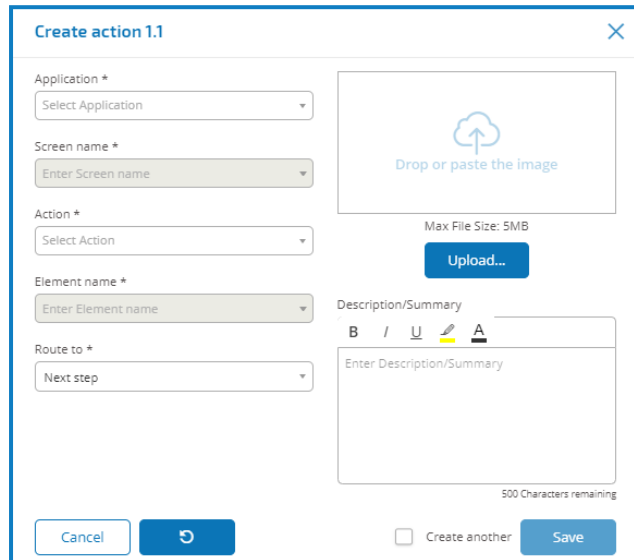
Process name	Process active	Version	Latest	Updated by	Updated date	Sections	Locked by	Owners	Contributors	Group signed off	My access	Signed off	Actions
Add Order	✓	0.1	✓	Demonstrator	21/02/2020 15:25:54	Launch and L...				✗	Owner	—	...

Step types

There are four step types that can be configured.

Action

Actions are used to configure the steps a user would perform in a screen such as input data into a field, click a button, close an application.



An action step is configured using the following fields:

- **Application** – Select the required action from the drop-down. Each currently defined application is available.
- **Action** – The type of action the step will perform:
 - **Input** – Used to input data into a field.
 - **Read** – Reads data from a form or field.
 - **Select** – Selects an option, i.e. dropdown menu item.
 - **Launch** – Launches an application.
 - **Close** – Closes an application.
 - **Drag and Drop** – Allows a data item to be moved between two applications.
 - **Click** – Presses a button or file menu item.
 - **Double Click** – Double click a button.
 - **Right Click** – Right click on a button.
 - **Validate** – Checks a data item.
- **Screen name** – The name that the user will give to the screen in the application on which the action will occur. As the user starts to type the screen name a list of possible names will appear of those that have been created earlier. If reusing an existing screen name the user can select from the list. If a new name, type the name and then moving to the next field will create the new screen name.
- **Element name** – Enter a name for the element that will enable the automation developer to recognize the field that the digital worker has to interact with, i.e. username, password, or login button.

- **Route to** – Determines what happens when the step is complete:
 - **Next step** – Moves to the next step in the process.
 - **TBC** – A placeholder that is useful if the required step has not yet been configured.
 - **End** – The end of the process. Each process must finish with a step that routes to End.
- **Image** – Take a snapshot of the application showing the fields and the buttons. The automation developer can then review this during the build to ensure that they are on the correct screen within the application. This also ensures they can recognize fields and buttons correctly.
- **Description/summary** – An optional description of the step.

To quickly add the next step in the process, select the **Create another** checkbox before saving. When you click save the dialog will refresh allowing you to quickly configure the action.

Decision

A decision determines what option should be taken if more than one outcome is available. The process can continue to the next step or another defined step. In the example below, a decision has been added after the login button has been pressed. The decision checks whether the incorrect username or password dialog displays. If neither appears then a decision needs to be made as to the next step undertaken.

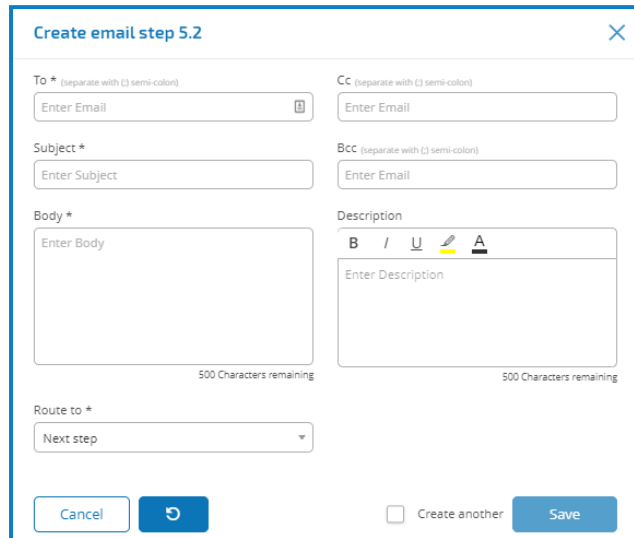
The screenshot shows a 'Create decision step 1.4' dialog box. It has two tabs: 'Logic' and 'Image/Summary'. The 'Logic' tab is selected. Under 'Type of decision', there are two options: 'True/False' (selected) and 'Custom Choice'. Under 'List of choice', there is a table with two rows: 'TBC' with 'On True *' and '2.1' with 'On False *'. To the right of this table, under 'On False', there are two options: 'Route to' (selected) and 'Exception'. Below 'Route to', there is a dropdown menu showing '2.1 Click New Order'. A 'Next' button is at the bottom right.

A decision step is configured using the following fields:

- **Type of decision** – The options that are available for the decision. This could be true/false or a custom choice.
- **List of choice** – The options available. Once selected, configure what will happen when the outcome of the choice occurs, such as progress to a specified stage.

Email

If a business process includes sending an email, configure the contents and recipients in an email step.

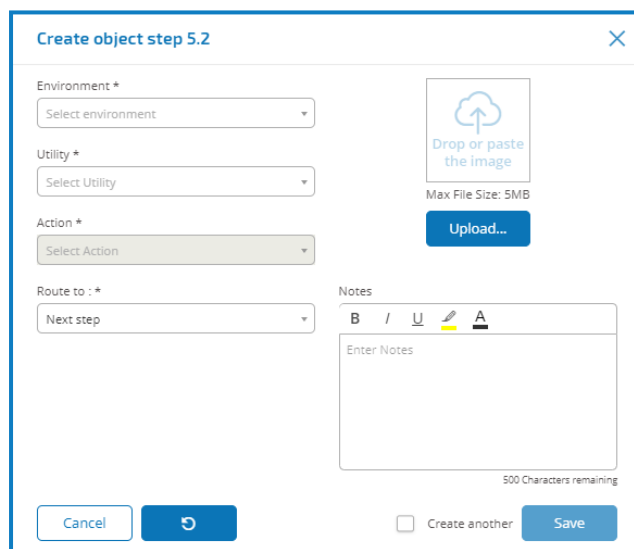


The 'Create email step 5.2' dialog box contains the following fields and controls:

- To *** (separate with (;) semi-colon): Text input field with a help icon.
- Cc** (separate with (;) semi-colon): Text input field.
- Subject ***: Text input field.
- Bcc** (separate with (;) semi-colon): Text input field.
- Body ***: Large text area with a 500 Characters remaining indicator.
- Description**: Text area with a rich text editor toolbar (B, I, U, highlighter, A) and a 500 Characters remaining indicator.
- Route to ***: Dropdown menu with 'Next step' selected.
- Buttons: Cancel, Save, and a 'Create another' checkbox.

Object

Incorporate Blue Prism business objects in process capture.



The 'Create object step 5.2' dialog box contains the following fields and controls:

- Environment ***: Dropdown menu with 'Select environment'.
- Utility ***: Dropdown menu with 'Select Utility'.
- Action ***: Dropdown menu with 'Select Action'.
- Route to : ***: Dropdown menu with 'Next step'.
- Notes**: Text area with a rich text editor toolbar (B, I, U, highlighter, A) and a 500 Characters remaining indicator.
- Image Upload**: A box with a cloud icon, text 'Drop or paste the image', 'Max File Size: 5MB', and an 'Upload...' button.
- Buttons: Cancel, Save, and a 'Create another' checkbox.

An object step is configured using the following fields:

- **Environment** – The Blue Prism environment in which the business object/utility file is located in.
- **Utility** – The name of the business object/utility file that the automation developer will use to call the required action.
- **Action** – The required action that the developer will use from the business object/utility file.
- **Route to** – Determines what happens when the step is complete.

Login example

This example demonstrates how to create the steps for a simple application login.

Launch the application

Open the selected application on the login screen and proceed to the next step:

- **Action** – Launch
- **Application** – As required
- **Route to** – Next step

Create action 1.1

Application *
Orders

Screen name *
Enter Screen name

Action *
Launch

Element name *
Enter Element name

Route to *
Next step

Max file size: 5MB

Edit Delete

Description/summary
Launch Desktop version of Orders Application

456 Characters remaining

Cancel Save

Enter a username

Enter a username in the Username field on the Login screen and proceed to the next step:

- **Action** – Input
- **Application** – As required
- **Screen name** – Login screen
- **Element name** – Username
- **Route to** – Next step

Create action 1.2

Application *
Orders

Screen name *
Login Screen

Action *
Input

Element name *
Username

Route to *
Next step

Max File Size: 5MB

Edit Delete

Description/Summary
Input Username into Username field of Orders Application

444 Characters remaining

Cancel Create another Save

Enter a password

Enter a password in the Password field on the Login screen and proceed to the next step:

- **Action** – Input
- **Application** – As required
- **Screen name** – Login screen
- **Element name** – Password
- **Route to** – Next step

The screenshot shows the 'Create action 1.3' dialog box. On the left, there are dropdown menus for 'Application *' (set to 'Orders'), 'Screen name *' (set to 'Login Screen'), 'Action *' (set to 'Input'), 'Element name *' (set to 'Password'), and 'Route to *' (set to 'Next step'). On the right, there is a preview of the 'blueprism Cloud' login screen with 'Username' and 'Password' fields and a 'Login' button. Below the preview are 'Edit' and 'Delete' buttons. A 'Description/Summary' text area contains the text 'Input Password into Password field of Orders Application'. At the bottom, there are 'Cancel', 'Save', and 'Create another' (checked) buttons.

Click the login button

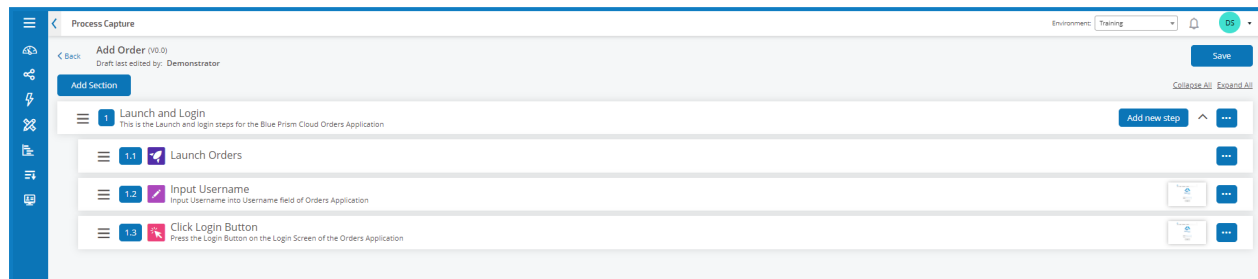
Click the Login button and proceed to the next step:

- **Action** – Click
- **Application** – As required
- **Screen name** – Login screen
- **Element name** – Login button
- **Route to** – Next step

The screenshot shows the 'Create action 1.3' dialog box. On the left, there are dropdown menus for 'Application *' (set to 'Orders'), 'Screen name *' (set to 'Login Screen'), 'Action *' (set to 'Click'), 'Element name *' (set to 'Login Button'), and 'Route to *' (set to 'Next step'). On the right, there is a preview of the 'blueprism Cloud' login screen with 'Username' and 'Password' fields and a 'Login' button. Below the preview are 'Edit' and 'Delete' buttons. A 'Description/Summary' text area contains the text 'Press the Login Button on the Login Screen of the Orders Application'. At the bottom, there are 'Cancel', 'Save', and 'Create another' (unchecked) buttons.

Process complete

All the required actions have been completed and are listed in the Process Capture screen.

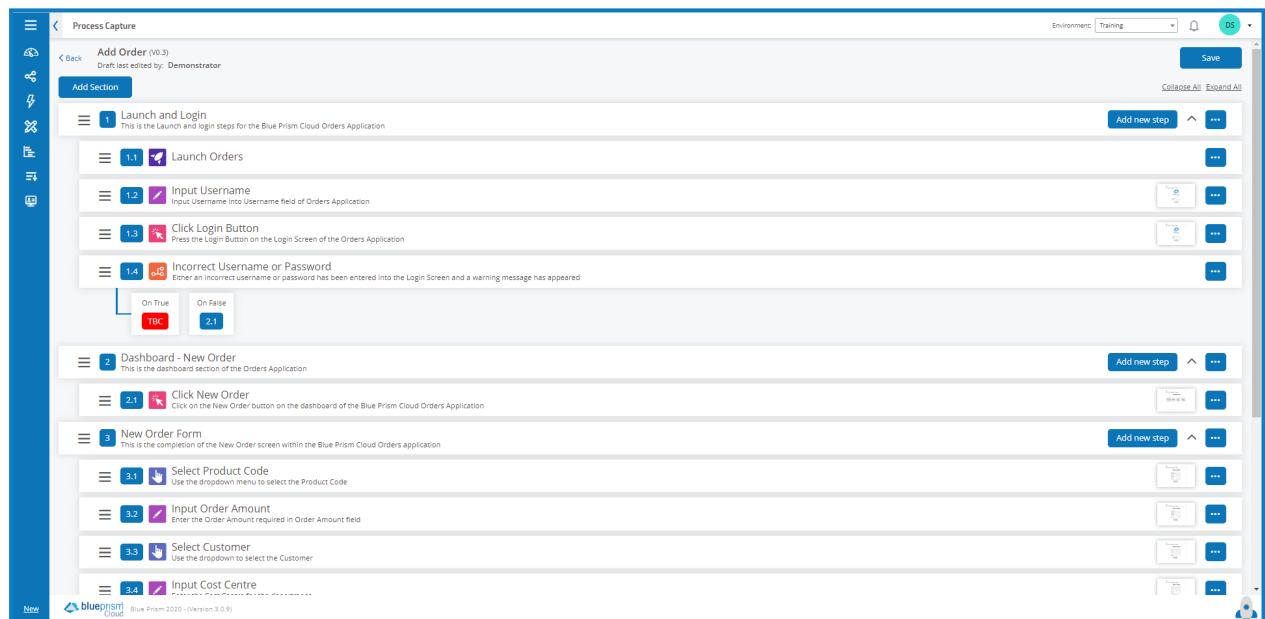


Add an exception to a PDD

Exceptions can be added to a process to cater for unexpected occurrences when running a process.

For information about creating exceptions, see [ALM exceptions](#).

1. From the Process Definitions tab, edit the latest release of the required process definition.
2. Locate the and edit the step that requires an exception.



3. Select the required step choice and select the **Exception** tab.

4. Select the required exception for this choice. In the example, we are adding the Incorrect Credentials Supplied exception to the incorrect login credentials step.

Dialog box titled "Edit decision step 1.4". The "Logic" tab is selected. Under "Type of decision", "True/False" is chosen. The "List of choice" section contains two entries: "E002 On True *" and "2.1 On False *". The "On True" section shows the "Exception" option selected, with a dropdown menu displaying "Incorrect Credentials Supplied". "Cancel" and "Save" buttons are at the bottom.

If the required exception has not yet been created, you can create the skeleton of an exception by selecting **Add New Extension** and following the prompts. For further information, see [Exception Pending](#).

Dialog box titled "Edit decision step 1.4". The "Logic" tab is selected. Under "Type of decision", "True/False" is chosen. The "List of choice" section contains two entries: "Add Ne... On True *" and "2.1 On False *". The "On True" section shows the "Exception" option selected, with a dropdown menu displaying "Add New Exception". Below this, there is a section for "New exception name *" with a text input field labeled "Enter New exception name". "Cancel" and "Save" buttons are at the bottom.

5. Click **Save**.

Exception pending

If you have added selected **Add New Exception** for a step choice, when you save the step a flag is added to the step in the PDD to show that it references an exception that has not yet been populated.

Diagram showing a step titled "1.4 Incorrect Username or Password" with the description "Either an incorrect username or password has been entered into the Login Screen and a warning message has appeared". Below the title, there are two choice boxes: "On True" (marked with a red flag icon) containing "E003" and a link "Click here to go to Exception", and "On False" (marked with a blue icon) containing "2.1".

Click the **Click here** link in the flagged step and configure the exception as described in [ALM – Exceptions](#).

ALM – Process definition table

The Process Definition table has a few important columns that you will need to be aware of.

- **Sections** – A list of high-level sections that make up the PDD.
- **Locked by** – Displays the user who is currently accessing the a process capture.
- **Group sign off** – The status of the sign-off. A tick displays in the column when all required business process members have signed off.
- **My Access** – Displays the access level you have for a PDD.
- **Sign off** – The status of the sign-off:
 - A tick indicates you have signed the PDD off.
 - A hyphen indicates that you do not have to sign off the PDD
 - A cross indicates that you have redacted your sign off

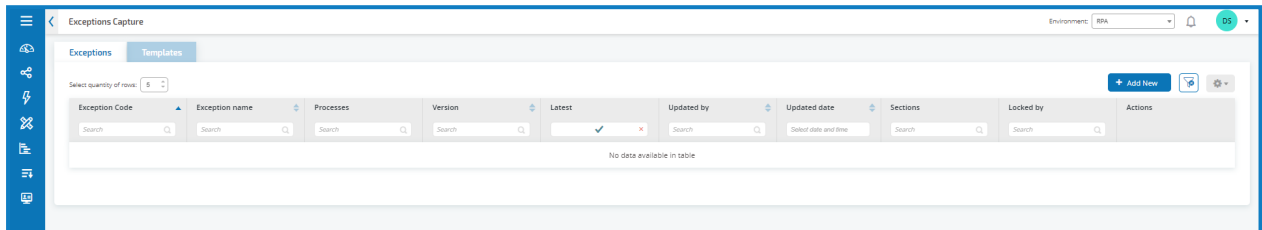
Process name	Process active	Version	Latest	Updated by	Updated date	Sections	Locked by	Owners	Contributors	Group signed off	My access	Signed off	Actions
Add Order	✓	1.1	✓	Demonstrator	16/04/2020 13:11:47	Launch and L... Dashboard - ... ->	Demonstrato	...		X	Owner	✓	...
Add Product	✓	0.1	✓	Demonstrator	24/02/2020 16:25:15	Launch and L...		...		X	Owner	-	...

Exceptions

The Exceptions option under ALM allows the creation of Exceptions and their attributes.

Create an exception

1. Select the Exceptions tab and click **Add New**.



The Create section dialog displays.

A screenshot of the 'Create exception' dialog box. It has a title bar with a close button. Inside, there is a text input field for 'Exception code' containing 'E001'. Below it is a larger text area for 'Name *' containing 'Unplanned System Exception'. At the bottom right, it says '74 Characters remaining'. At the bottom are two buttons: 'Cancel' and 'Save'.

2. Enter a description for the exception – exception codes are automatically assigned by the system.

3. Follow the prompts to create the necessary sections and steps that must be performed if the exception occurs.

Create section [X]

New | Template

Name *

Terminate All Applications

Description

B / *I* / U / [Bulleted List] / [Numbered List] **A**

Terminate All Applications in the event of a System Exception (Unplanned)

427 Characters remaining

Cancel ☐ Create another **Save**

4. Click **Save**.

The exception can now be used in the steps in a process definition document as described in [Add an exception to a PDD](#).

Default exception

It is recommended that the first Exception created is the default “Unplanned System Exception” and is used as a catch all when something unexpected happens.

The image shows two parts of the Blue Prism interface. On the left is a 'Create exception' dialog box. It has a title bar with a close button (X). Inside, there is a text input for 'Exception code' containing 'E001'. Below it is a larger text input for 'Name *' containing 'Unplanned System Exception'. At the bottom right of the name input, it says '74 Characters remaining'. There are 'Cancel' and 'Save' buttons at the bottom. On the right is a sidebar titled 'Exceptions Capture'. It shows a list of exceptions. The first one is 'Unplanned System Exception (v0.0)' with a draft status and 'Demonstrator' as the last editor. Below it is a section titled '1 Terminate All Applications' with a description 'Terminate All Applications in the event of a System Exception (Unplanned)'.

As this is the catch all Exception, it must be modified each time a new application is added to support the termination process. Subsequent Exceptions should be specific to the business process and the error that has occurred.

In this example the following is created to handle the incorrect credentials being added.

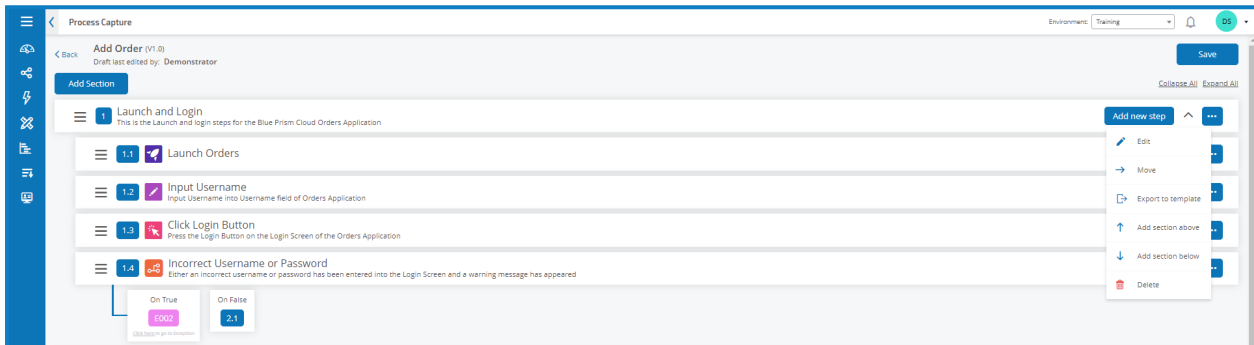
The image shows two dialog boxes side-by-side. On the left is a 'Create exception' dialog box. It has a title bar with a close button (X). Inside, there is a text input for 'Exception code' containing 'E002'. Below it is a larger text input for 'Name *' containing 'Incorrect Credentials Supplied'. At the bottom right of the name input, it says '70 Characters remaining'. There are 'Cancel' and 'Save' buttons at the bottom. On the right is a 'Create section' dialog box. It has a title bar with a close button (X). It has two tabs: 'New' (selected) and 'Template'. Inside, there is a text input for 'Name *' containing 'Incorrect Credentials'. Below it is a larger text input for 'Description' containing 'Incorrect Username or Password has been supplied for the Orders Application.' At the bottom right of the description input, it says '424 Characters remaining'. There are 'Cancel' and 'Save' buttons at the bottom, and a checkbox labeled 'Create another' between them.

Templates

Templates exist in both the process definitions and exceptions options of the Automation Lifecycle plugin. Templates allow you to re-use sections of a process definition or exception as a repeatable block. For example, a login section may be used in multiple processes and using a template means you will not have to recreate the login section for each.

Export a section as a template

In the Process Capture screen, select Export to Template from the context menu for the section you want to export.



Update the name and description if required.

The 'Export to template' dialog box is shown. It has a title bar with a close button. Inside, there is a 'Name' field with the text 'Launch and Login'. Below it is a 'Description' text area containing the text 'This is the Launch and login steps for the Blue Prism Cloud Orders Application'. At the bottom right of the text area, it says '422 Characters remaining'. At the bottom of the dialog are two buttons: 'Cancel' and 'Save'.

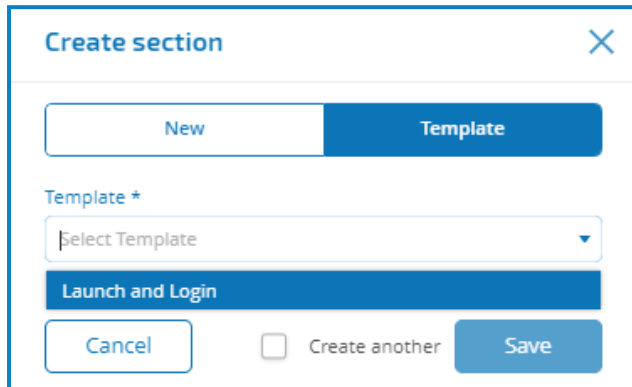
Click **Save**.

The section is saved as template.

Use a template in a process definition

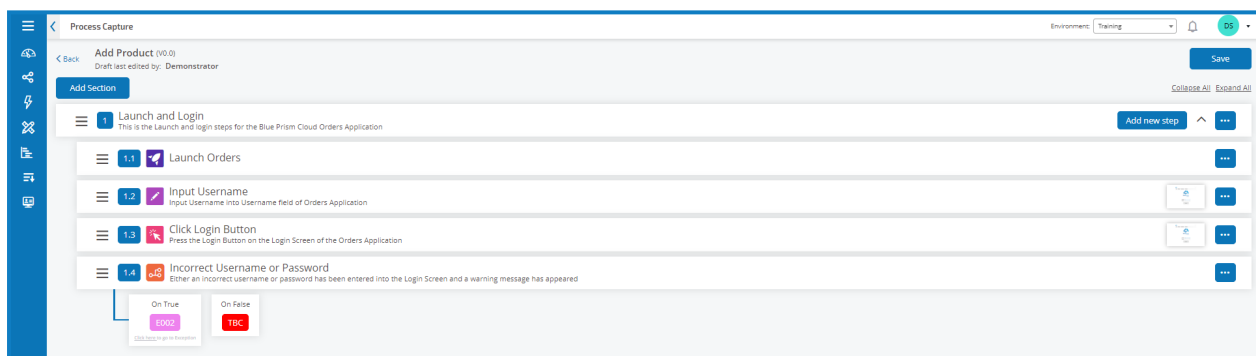
To use a template in a process definition, go through the process as normal, [creating a business process](#) and a [new process definition](#).

When you are creating a section, choose to import a template rather than creating a new section from scratch.



The 'Create section' dialog box is shown. It has a title bar with a close button (X). Below the title bar are two tabs: 'New' and 'Template'. The 'Template' tab is selected. Under the 'Template' tab, there is a dropdown menu labeled 'Template *' with the text 'Select Template'. Below the dropdown is a button labeled 'Launch and Login'. At the bottom of the dialog are three buttons: 'Cancel', 'Create another' (with an unchecked checkbox), and 'Save'.

Click **Save** to create the first section of the process from the saved template.



The 'Process Capture' interface is shown. It has a top bar with 'Process Capture' and 'Environments Training'. Below the top bar is a section titled 'Add Product (v0.0)' with a subtitle 'Draft last edited by: Demonstrator'. There is a 'Save' button in the top right. Below this is a section titled 'Add Section'. The main area shows a list of steps: 1. Launch and Login (This is the Launch and login steps for the Blue Prism Cloud Orders Application), 1.1 Launch Orders, 1.2 Input Username (Input Username into Username field of Orders Application), 1.3 Click Login Button (Press the Login Button on the Login Screen of the Orders Application), and 1.4 Incorrect Username or Password (Either an incorrect username or password has been entered into the Login Screen and a warning message has appeared). There are 'Add new step' and 'Expand All' buttons. At the bottom, there are 'On True' and 'On False' buttons with 'E900' and 'TBC' labels respectively.

Templates can also be used in [Exceptions](#) in the same way.

Other features

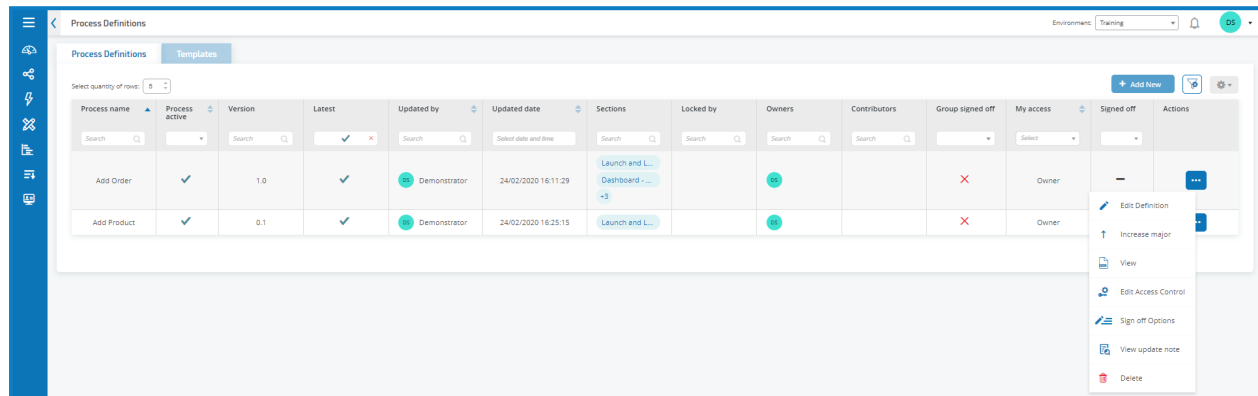
A number of other features are available when you are using the Process Capture screen, as described below:

- The up and down arrows allow you to collapse or expand sections.
- The Collapse All and Expand All links expand or collapse all sections.
- The context sensitive menu allows you to Edit, Move, Add Step Above, Add Step Below or Delete a step that has been created.
- Grabbing the three horizontal bars at the front of the step or section allows you to drag and drop the item to update the order.
- The following text areas are embedded with WYSIWYG (What You See Is What You Get) capabilities:
 - Create Business Process > Notes
 - Add Section
 - Add New Step > Action, Decision, Email, Object
 - Save Minor
 - Save Major
- You can view notes saved on a PDD upon updating your major/minor version by selecting the context sensitive bar and selecting **View update note**.
- When navigating to business process, your default view will be to see the business process that you are a member of. To view all business processes, select the drop-down menu located above the business process table and select **All Business Processes**.

Process definition sign-off

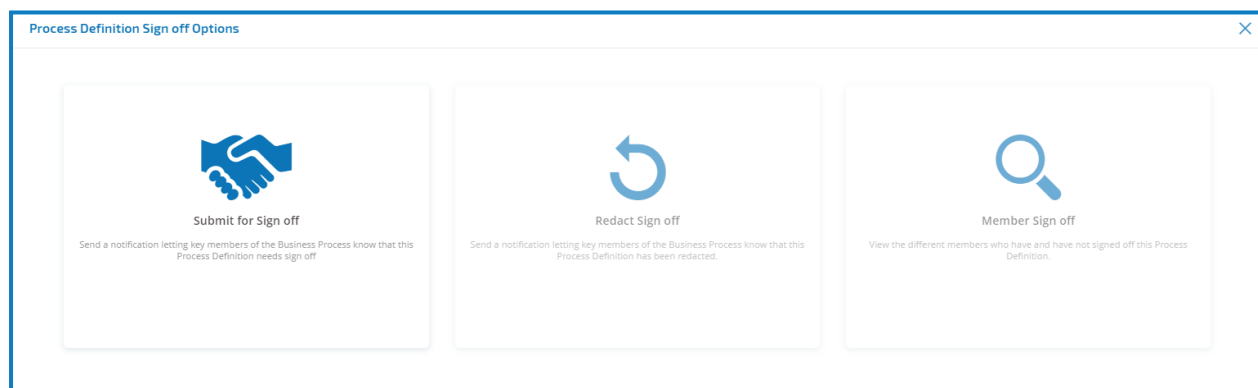
In the Automation Lifecycle plugin the users with the Process Definition Owner role can initiate the sign-off procedure. This workflow usually occurs when all the sections and steps in a business process have all been captured.

To initiate the process definition sign-off procedure, select Sign-off the owner can select the context sensitive menu and the click **Sign-off Options**.



Select a sign-off option:

- Submit for Sign Off
- Redact Sign Off
- Member Sign Off



Submit for sign off

Once a process definition has been fully configured, you can send it to be signed off by the appropriate people in your organization. Each person must have a valid Blue Prism Cloud login so they can be selected to sign off the PDD.

Select the checkbox in the Sign off required column for the members who are responsible for signing off the PDD and click **Send**.

The selected users are sent a [notification](#) telling them that the PDD needs to be signed off.

Submit for Sign off

Members

You will not be able to add or remove members from the sign off list once you select send

Name	Email	Access	Sign off required (3/3)
Search	Search	Select	
Demo Strator	noreply@noreply.com	Owner	<input checked="" type="checkbox"/>
ALM Approver	alm_approver1@noreply.com	Viewer	<input checked="" type="checkbox"/>
ALM Approver	alm_approver2@noreply.com	Viewer	<input checked="" type="checkbox"/>

Back Send

Sign off a PDD

When a business process owner initiates the sign-off procedure, the required members receive an in-product notification letting them know that sign off is required. Members must then navigate to the Process Definition screen. Using the context sensitive menu, members can select to view or sign off the process definition and if required, view the update note.

Process Definitions

Process Definitions Templates

Select quantity of rows: 5

Process name	Process active	Version	Latest	Updated by	Updated date	Sections	Locked by	Owners	Contributors	Group signed off	My access	Signed off	Actions
Search		Search	<input checked="" type="checkbox"/>	Search	Select date and time	Search	Search	Search	Search		Select		
Add Order	<input checked="" type="checkbox"/>	1.1	<input checked="" type="checkbox"/>	Demonstrator	16/04/2020 13:11:47	Launch and Lo... Dashboard - N... +3	Demonstrator				Viewer	<input checked="" type="checkbox"/>	View Sign off Process Definition View update note

When a member selects to sign the process definition off, a dialog displays asking them to confirm they have reviewed the PDD.

Process Definition Sign-Off

Are you sure you want to Sign-Off?

Important: It is good practice to review the Process Definition before signing it off.

No Yes

When a member selects to sign a PDD off, a notification is sent to the business process owners. Once signed-off, the member will have the option to redact the PDD. They can do this by selecting the context sensitive button on the Process Definition screen, clicking **Redact Sign-Off** and confirming their decision.

The screenshot shows the 'Process Definitions' screen in Blue Prism 2020. The table lists process definitions, and a dropdown menu is visible for the 'AN Test' process, showing options: View, Redact Sign off, and View update note.

Process name	Proc... active	Version	Latest	Updated by	Sections	Locked by	My access	Signed off	Actions
AN		Search	✓	Search	Search	Search	Select		
AN Test	✓	0.1	✓	AN anoop.nandra		AN anoop.nandra	Viewer	✓	...

A user cannot redact a process definition once every member has approved and signed it off. In this case the owner of the process definition must redact for all approvers, make the necessary adjustments, and then resubmit for approval.

Redact sign off

When a Process Definition has been sent out for review, it is locked for editing. Only an owner can Redact this process. However, a Reviewer can Redact their own review, providing this is done prior to all other reviewers completing their review. Once all Reviewers have either approved or rejected the sign-off process the only individual who can remove the lock, whether through redaction or acceptance is the Owner of the Process Definition.

Member sign off

This option lets you to keep track of the sign-off and check the status of the sign-off for each member. The screen shows the members name, email address, sign-off status and sign-off date time. There are three possible sign off states:

- **Awaiting Sign-off** – Member has not signed-off yet.
- **Redacted Sign-off** – Member had signed-off, however has chosen to redact the initial sign-off.
- **Signed-off** – Member has signed-off.

The screenshot shows the 'Member Sign off' screen. It displays a table with the following data:

Name	Email	Access	Sign off status	Sign off Date Time
Demo Strator	noreply@noreply.com	Owner	Signed off	16/04/2020 13:33:06
ALM Approver	alm_approver1@noreply.com	Viewer	Redacted sign off	16/04/2020 13:33:48
ALM Approver	alm_approver2@noreply.com	Viewer	Signed off	16/04/2020 13:34:13

Triggered notifications

There are several in-built triggers that notify users about specific events throughout the automation life cycle. To view these notifications, select the bell icon located in the top-right corner of your screen. If you have no notifications the notification tray will be empty. This icon is also used to review any future system announcements.

The screenshot shows the 'Process Definitions' page in Blue Prism. It features a table with columns for Process name, Version, Latest, Updated by, Updated date, Sections, Locked by, Owners, Contributors, Group signed off, and My access. Two process definitions are listed: 'Add Order' and 'Add Product'. To the right of the table is a notification tray with a bell icon and a count of 7 notifications. The notifications include 'Process Definition is signed', 'Process Definition signed off', 'Process Definition signed off redacted', and 'Process Definition is signed'.

The table below describes each notification type.

Notification	Trigger	Recipients
PDD sign off	The Business Process Owner initiates a PDD sign off.	Members who need to sign off the PDD.
PDD signed off	All required members have signed off a PDD.	Business process owners.
PDD sign off redacted	A required business process member has redacted a PDD that they have previously signed off.	Business process owners.
PDD sign off by Business Process Owner	A business process owner redacts the sign-off process.	Members who need to sign off the PDD.
All required members have signed-off	All required business process members have signed a PDD off.	Business process owners.