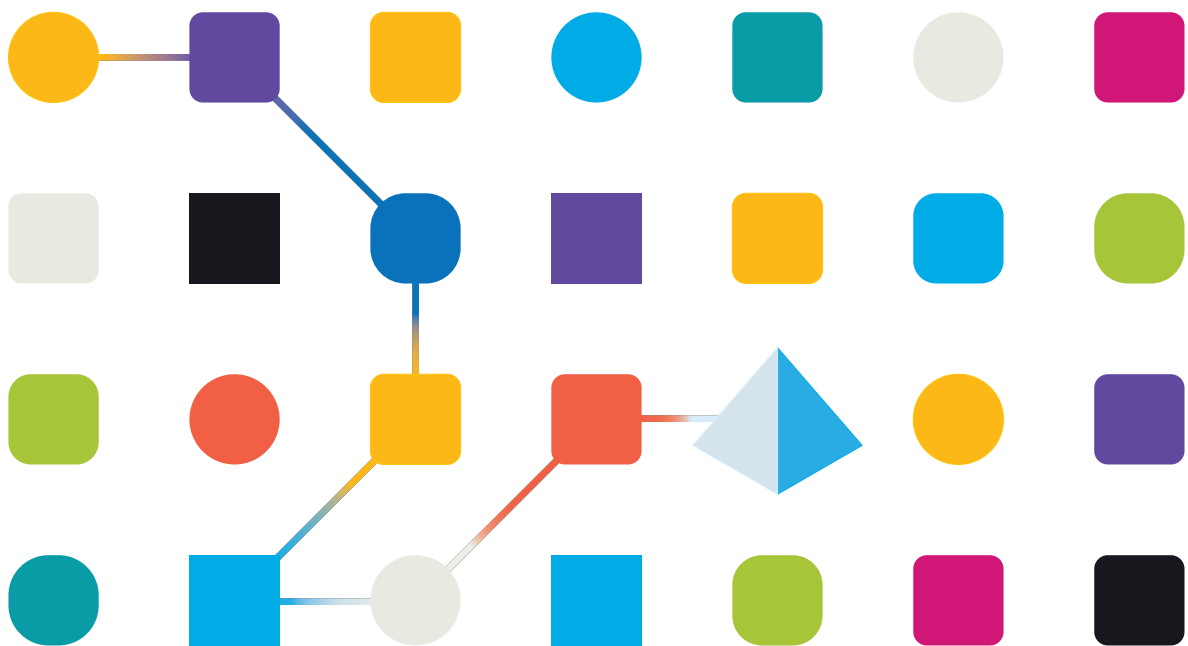# blueprism®

Hub 3.0

User Guide

Document Revision: 1.0

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Contents

Hub 3.0

Blue Prism Cloud® brings together the principles of Cloud, Robotic Process Automation (RPA) and Artificial Intelligence (AI) to offer a proprietary Software as a Service (SaaS) platform designed to automate and digitize the execution of knowledge-based work. Digital workers are deployed non-disruptively into business operations and work by emulating the way people use business systems, the decisions they make and the processes they follow, to augment, replace, or digitize manual work processes.

As the digital workforce landscape matures within an organization, operators and sponsors alike need to scale their approaches and methodologies to manage their automation investment. Management information on the digital workforce needs to be transparent across the business and intuitive to interpret, in addition best-practices need to be monitored to ensure alignment to industry standards. Blue Prism Cloud Hub provides new and existing Blue Prism users with a productivity platform for the management of the automation lifecycle. Hub caters for the individual roles within the robotic operating model (ROM) with a set of capabilities to ensure the successful, scalable delivery of an automation strategy.

The Hub product has been created as a lightweight 'empty' application which is then populated by a series of plugins (features). This forms what is referred to as the plugin architecture which allows the Blue Prism Cloud team to iterate features and make them available for consumption by the Hub administrators.

Each Hub instance contains a 'Plugin Repository' page which allows Hub administrators to view and deploy new plugins as well as update to existing plugins.

This user guide is split into two key sections, the administration interface and the use of the individual plugins from a user perspective.

Administration and configuration

When Hub is installed for an organization, it is delivered with a main administrator role and pre-configured with information provided for items such as email and database settings.

At the point of deployment Blue Prism Cloud may also configure into an existing Active Directory environment using LDAP if requested. It is then the responsibility of the organization to create additional users and customize settings specific to their needs. To perform these tasks the organizations administrator should log into Hub, via the Identity Management Server (IMS), using the supplied credentials.

Hub utilizes Role Based Access Control (RBAC) to ensure that users can only access functionality required to perform their role within their organization.

There are six main areas of functionality that the administrator role gives access to:

- Basic administration – Manage your profile, environment, and other settings.
- System configuration – Configure email and database settings.
- Plugin management – Install, update, and license Hub plugins.
- Authentication and user management – Configure user accounts and manage registration.
- Customization settings – Configure the look and feel of the Hub user interface.

Basic administration

When an administrator logs into Hub, a number of additional functions are available from the top navigation menu which are not available to users without administrator capabilities enabled on their account.

The features on the top navigational menu bar include:
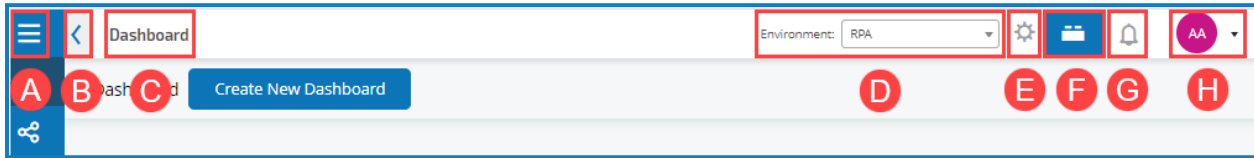
The features on the top navigational menu bar include:

A. Expand or collapse the menu to see the installed plugins.

B. Collapse or expand the left navigational bar.

C. The area of the Hub user interface you are currently using.

D. The currently selected environment. Environments are set up in the database connections screen and any present can be selected here.

E. The Hub settings – available only to administrators.

F. The plugin repository – available only to administrators.

G. Your notifications and announcements. Only notifications that you are authorized to see or that are applicable to you will show. Announcements are informational messages delivered by Blue Prism Cloud on items such as upcoming events, product developments or new releases that are now available. You can review previous announcements or notifications by clicking **View Read Announcement** or **View Archived Notifications** options respectively. Previous announcements or notifications are filtered by age.

> Notifications are only used by the Automation Lifecycle Management plugin.

H. Your profile. The drop-down menu lets you edit your profile or log out from Hub.

You can change your email address, password, your first and last names but you cannot change your username. An avatar image, which by default is your initials, can be assigned by clicking on Add Avatar. Avatars cannot be greater than 1 MB in size.
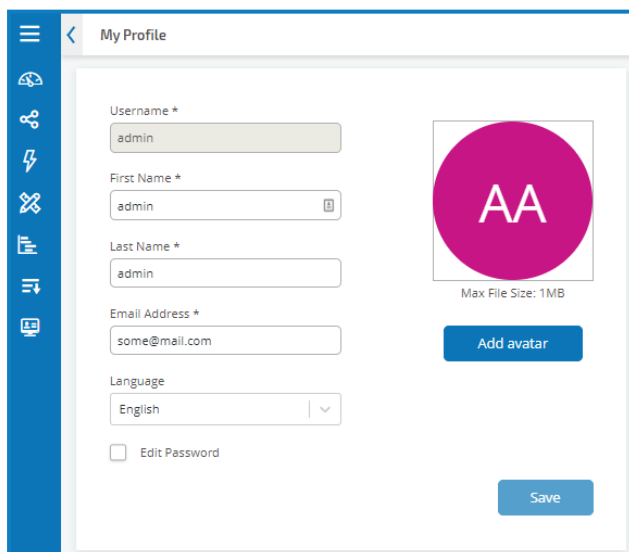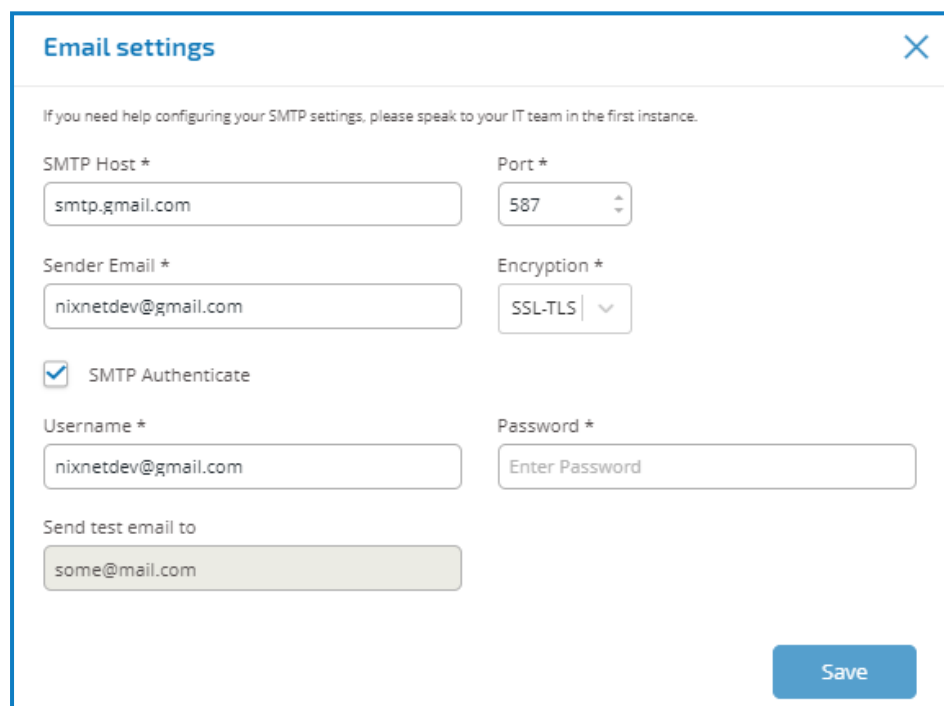
System configuration

Once Hub has been successfully installed you are required to configure the email and database settings essential for normal operation and are accessed through the administration settings cog.

Email settings

Email settings allows you to change the configuration of SMTP. Changes should be done in conjunction with your own IT Support team to ensure that the configuration and credentials match what they have set up on your organization's email server. The following information is required:

- SMTP host
- Port
- Sender email
- Encryption method
- Username
- Password

Whenever you save the SMTP settings, a test email is sent to the user you're logged in as to ensure the set up is correct. If you don't receive a test email after saving changes, check the details and update accordingly.

Database settings

The database connection option under the administration settings cog allows you to add a connection string to the Blue Prism RPA database and the Hub database.

> You cannot change the original RPA database settings or the Hub database settings as these are coded into the system at installation time and cannot be altered.

To save any changes, press the Save button, or to discard changes, press the "X" in the top right corner. Whenever you save the SMTP settings, a test email will be sent to the user you're logged in as to ensure everything has been setup correctly. If you don't receive this test email, then something has been setup incorrectly.

The database connection option under the administration settings cog allows you to add a new connection string to the Blue Prism RPA database. You cannot change the original RPA database settings or the Hub database settings as these are coded into the system at installation time and cannot be altered.
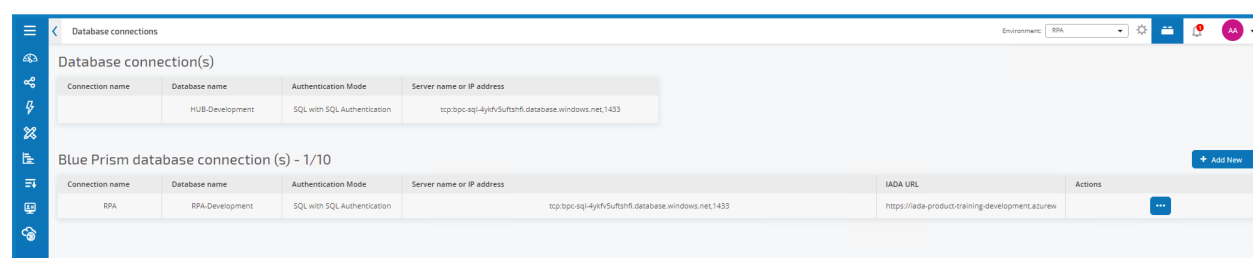
Add a Blue Prism database connection

To add an additional RPA database connection to the database list, click **Add New** and provide the necessary configuration parameters. Click **Save** to add the connection.

> You will need the dbowner SQL database permissions to do this.

Once a new RPA database has been added or changes have been made to an existing RPA database, for example adding a new digital worker, then the database settings will need to be "refreshed" to bring details of the digital workforce and queues across. If this is not done, you will not be able to see the digital workers or queues in that particular RPA environment.

Plugin management

Plugins are the heart of Hub and are self-contained features that can be individually installed and customized to provide information about your digital workforce. Some plugins also provide the user with development tools to assist in the build of automations.

When an administrator selects the plugin repository, details of the installed plugins are displayed, some of these are available by default during the installation process.

For each plugins a description details the functionality of the plugin and whether there are any dependencies. A version number is also displayed.
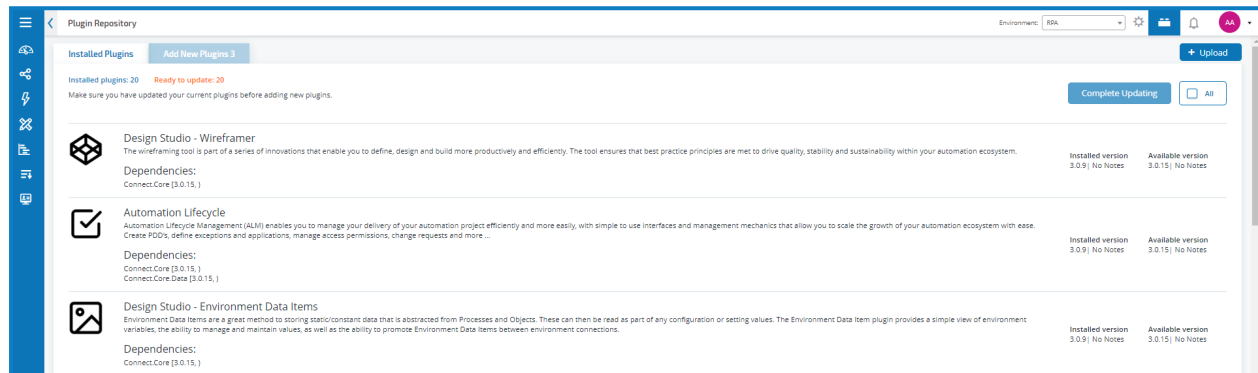
Add a plugin

Before you add a plugin, ensure that all installed plugins are up to date. Where a newer version of a plugin is available, this is highlighted and the option to update those plugins is enabled.

Click **Add New Plugins** to see a list of available plugins that can be installed. Select a plugin and click the **Install** button.

Multiple plugins can be installed at any one time and if the plugin is dependent on another plugin which isn't currently installed, that plugin is automatically installed.

> When a plugin is installed or updated, the web site will automatically restart so it is essential that the installation of plugins is performed out of hours, during maintenance windows.
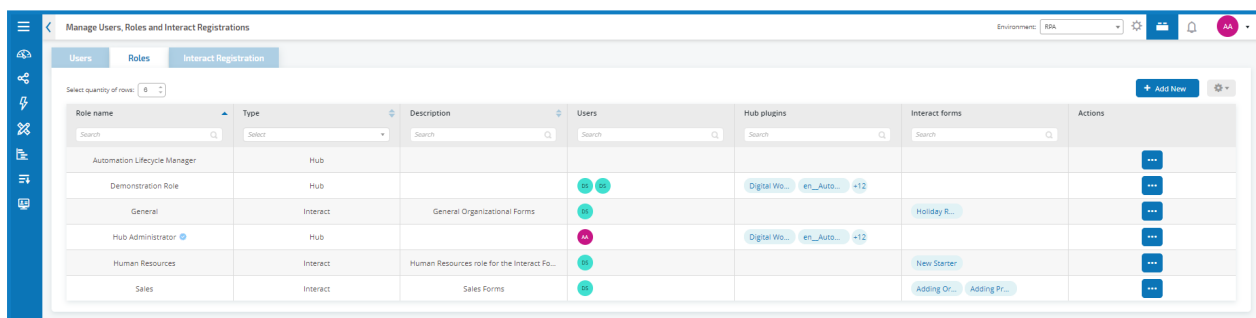
Authentication and user management

There are two elements to Authentication and User Management and the organization has to decide on how they wish to operate. An organization has the choice to operate with named user accounts or local accounts. If the organization decides on local accounts, they will not need to utilize the Authentication Settings under the administration settings cog.

If the organization decides to utilize the user accounts configured into an organization's Active Directory, then Authentication Settings will need to be used to configure LDAP settings. It is important to note that even if an organization is using LDAP to synchronize user accounts, named users can also be used for specific accounts and we recommend that the main Administrator account remains as a local named account.

Before you configure users either through LDAP or local users, it is recommended that user roles are configured first. If this is not performed users will be able to log on once their accounts are created but without a role assigned, they will get a limited display and no access to features or functionality.

User management is split into three areas – roles, users, and registration and is accessed by selecting **Users, Roles and Registration Approval** from the settings menu. Before you configure users, it is recommended that user roles are configured first. If this is not performed users will be able to log on once their accounts are created but without a role assigned, they will get a limited display and no access to features or functionality.

Authentication settings

Authentication Settings allows the configuration of an LDAP connection to an organization's Active Directory environment.

> If your organization has decided to commence with named user accounts this bit can be skipped. If an organization changes this decision at a later point, they can come back and add an LDAP connection to their Active Directory at any time.

Add a connection

1. From the settings cog, select **Authentication Settings** > **New Connection** to display the LDAP Settings dialog.

2. Configure the connection using the following fields:
    - **Connection Name** – A name that you want the connection to be known as.
    - **Domain** – The name of domain you are connecting to, for example "bpc".
    - **LDAP Server** – The hostname of the LDAP server, for example blueprismcloud-srv1.local.
    - **Port Number** – The Port Number it operates on, by default this is Port 389.
    - **Base DN** – The starting point within the Active Directory where the system begins to look for users, for example dc=blueprismcloud, dc=local.
    - **Time Out** – The timeout period in seconds that the system will wait to get a response from the Active Directory server.
    - **Query Bind Username** – An Active Directory administrator that has access to the organization's LDAP system.
    - **Query Bind Password** – The password for the Active Directory administrator.
    - **Attributes** – Username, Last Name, First Name and E-mail are pulled from the Active Directory environment.

> To test that everything is setup correctly a Test Username can be entered, then by selecting the Lookup User the information will be retrieved and populated in the corresponding Attributes fields

3. Once all complete and tested, click **Save**.

Import Active Directory users

Once a connection has been saved you are prompted to import users from the Active Directory. You can choose to do this now or resynchronize at a later stage.

If you said yes to synchronizing now, you will get a list of the users to be imported. You can choose to import a specific user or not and you can assign them Hub Roles that have been previously setup and any Interact responsibilities. This is performed on a user by user basis allowing you to be selective on individual users.

> Hub administrators role have access to all the plugins and features of Hub, including the ability to create new Database and LDAP connections and other security features. Ensure this role is only assigned to those users that need access to this functionality.

If you choose not to synchronize now, you are returned to the Authentication Settings form.

If at a later point, additional users are added to the Active Directory, then these will need to be synchronized. From the Authentication Settings form, using the three dots (Meatball menu) and select the Re-Sync option corresponding to the LDAP connection that you wish to use, you will be allowed to add any new users to the Hub user base.
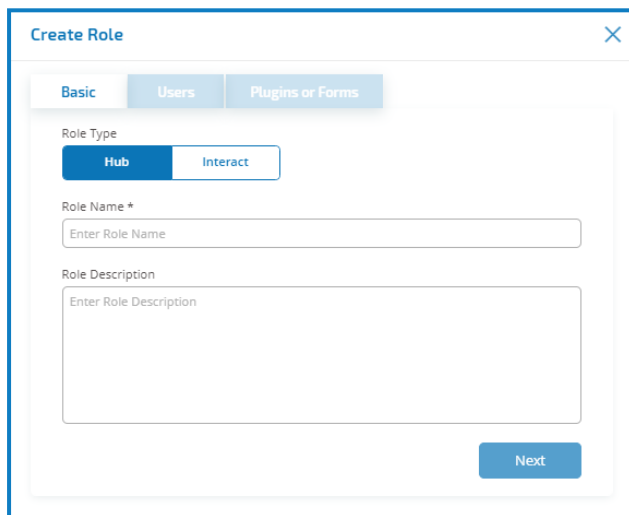
Roles

Role management is performed by an administrator using the Users, Roles and Registration Approval option under the administration settings cog. The default display will show you the current users registered in Hub, their roles, and access rights.

Select the **Roles** tab to display the the current users registered in Hub, their roles, and access rights. If this is the first access only the automatically created administrator role will be listed. This is a locked role and cannot be changed or deleted.
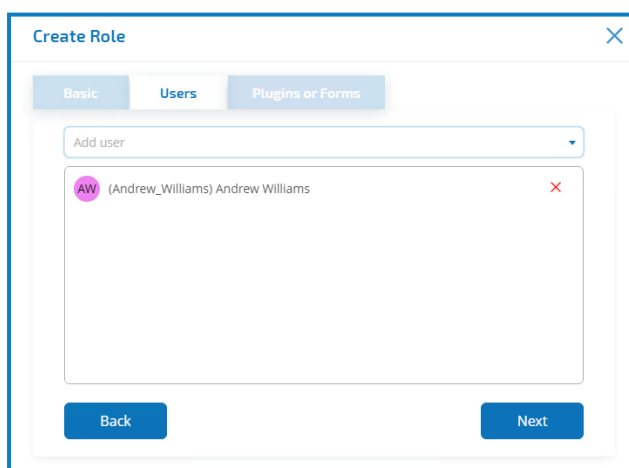
Add a role

1. On the Manage Users, Roles and Registrations screen, select the **Roles** tab.
2. Click **Add New** to display the Create Role dialog.
3. In the Basic tab, enter a name for the role and a suitable description to describe what the user has access to.

4. Click **Next**.
5. In the Users tab, select the users that will be assigned this role.

6. Click **Next**.

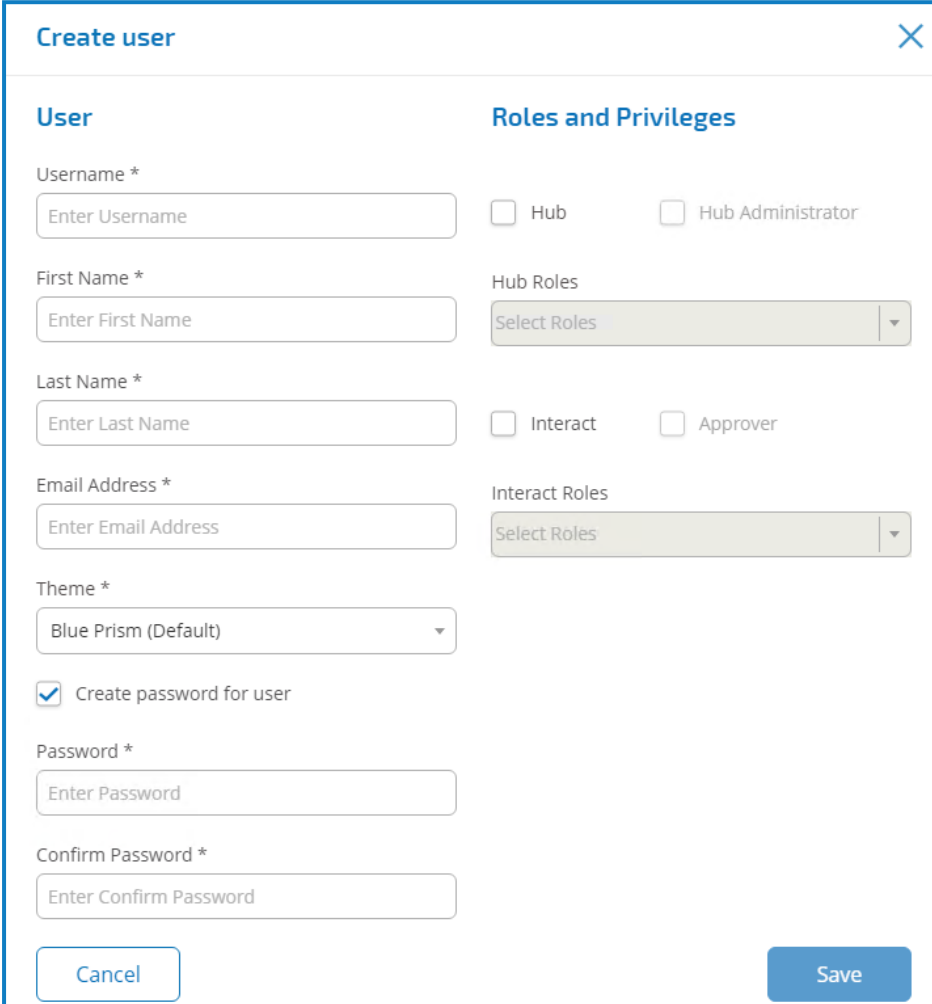7. In the Plugins or Forms tab, select the plugins that you want the user role to have access to.

8. Click **Save** to create the role.

Users

Create accounts for your users.

Add a user

1. On the Manage Users, Roles and Registrations screen, select the **Users** tab.
2. Click **Add New** to display the Create user dialog.

3. Enter the user's details:
   - Username
   - First name
   - Last name
   - Email address
   - Theme

4. To create a default password for the user, select the **Create password for user** check box and add a password. If this option is not selected, the user will be prompted to enter a password on log on using a link that is emailed to them when the account is created.

5. Configure the roles and privileges for the user:
   - **Hub** – Select this check box for standard hub users.
   - **Hub Administrator** – Select this check box to give the user role administrator permissions.
   - **Hub roles** – Select the Hub roles required for the user. If the role has not yet been created, you can edit the user at a later date to assign new roles. If the user was created without a Hub Role being assigned in the Setup Status column of the User form an exclamation mark will illustrate that the user setup has not been completed. Though the user will be able to log in to Hub, they will not be able to perform any tasks as they will not have access to any plugins.
   - **Interact** – Allocating Forms to a user. See interact user guide...zzq
   - **Approver** – Select this check box to give the user role approval rights for Interact.
   - **Interact roles** – Select the Interact roles required for the user. If the role has not yet been created, you can edit the user at a later date to assign new roles.

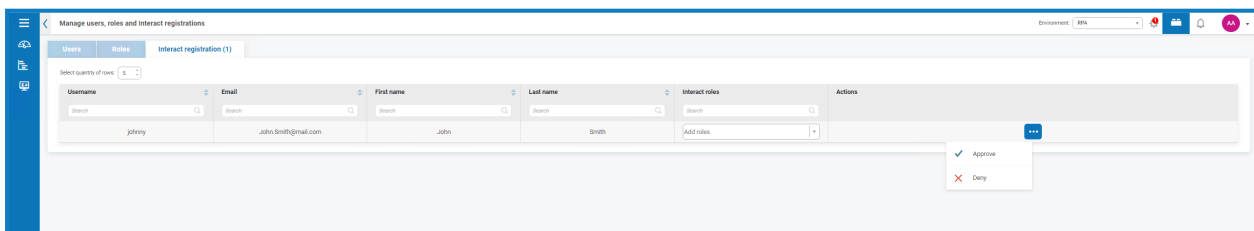6. Click **Save** to create the user.

Registration

Users can request an Interact user account from the registration page: https://{hostname}/#/user-registration

Submitted registration requests are shown in the Interact Registration tab where administrators can approve or deny requests. If accepted the user will receive an email providing a one time use link to complete registration by entering a password and the user will then be able to access Interact.

> The user will need to be added to a Role before they will be able to access any Forms.

Customization settings

Customization settings, accessed from the administrator setting cog, allow you to change the appearance of Hub.

Administrators can change the following settings:

- Brand Text Name
- Strap-line
- Login Background Font Color
- Brand Logo
- Spinner logo
- Favicon
- Inline Image
- Login Background Image
- Brand Language:
    - English
    - French
    - German
    - Japanese
    - Russian
    - Spanish (Latin American)
    - Simplified Chinese
    - Portuguese (Brazilian)

> User can also set their own language preference through their profile settings or through the Identity Management System (IMS) server.

Once the changes have been made, click **Apply** to save the changes.
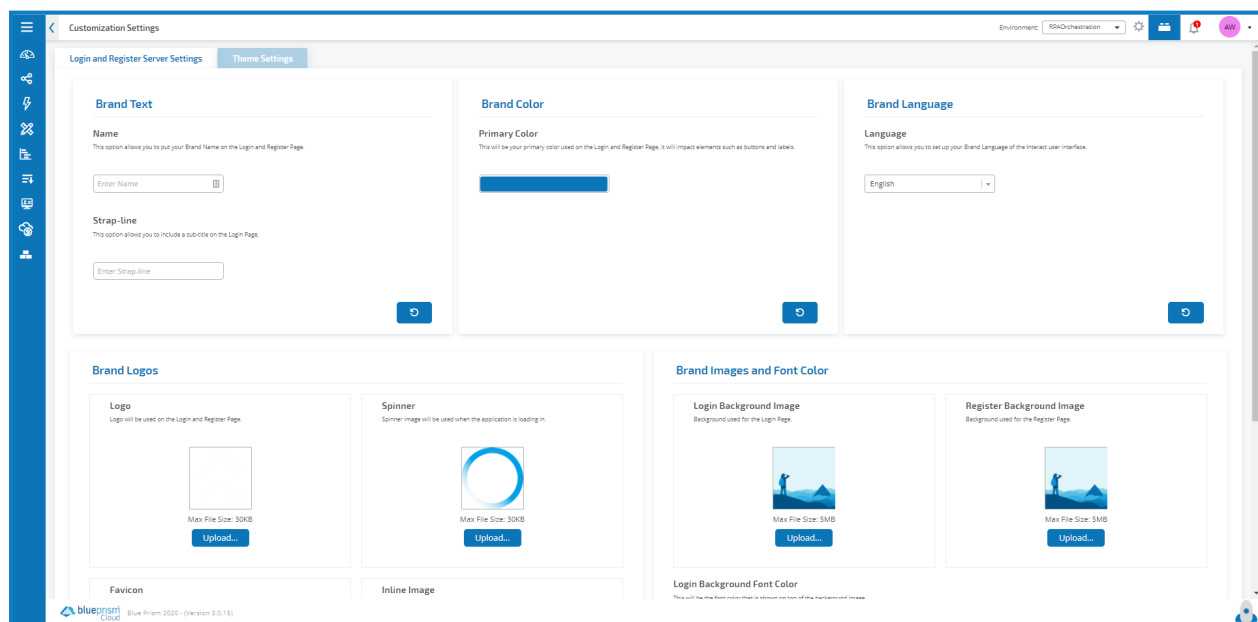
Using Hub

This section details the user functionality. What the user sees and has access to is determined by the role they have been assigned. Plugins are assigned to roles and then users are allocated a specific role, thereby inheriting the plugins. b

In this topic:

- Dashboards
- Platform Management plugins
- Digital Workforce plugins
- Design Studio plugins
- Automation Lifecycle Management plugins
- Queue Management plugins
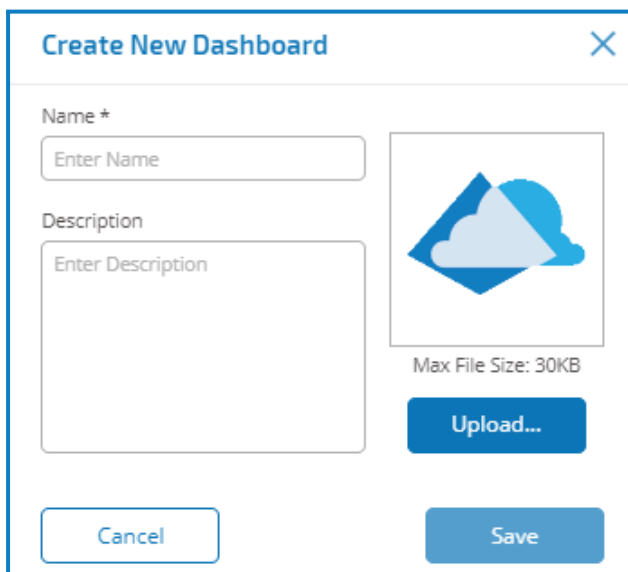- Interact plugins
- Cognitive plugins

Dashboards

When first starting Hub the default display is a blank Hub dashboard – this is the same whether you are a Hub administrator or a standard Hub user.

The dashboard is a configurable page that provides a tailored view of your digital workforce and the activity it has completed. The user can also create multiple dashboards to represent different views presenting information to enable you to manage and control the workforce to maximize its capabilities.

Create a dashboard

1. Click **Create a New Dashboard** from the action button.
2. Enter a name and a description for the dashboard.
3. Assign an image to make the dashboard easily recognizable. The image must be less than 30KB in size and no greater than 200 by 200 pixels.


4. Click **Save**.

Existing dashboards can be deleted and edited from the action button.

Add widgets

Widgets are the dashboard components that allow you to analyze your digital workforce. Up to 20 widgets can be added to each dashboard. Widgets can be added multiple times and configured to look at different digital workers or items.

1. Select the widget repository button to display a list of available widgets.
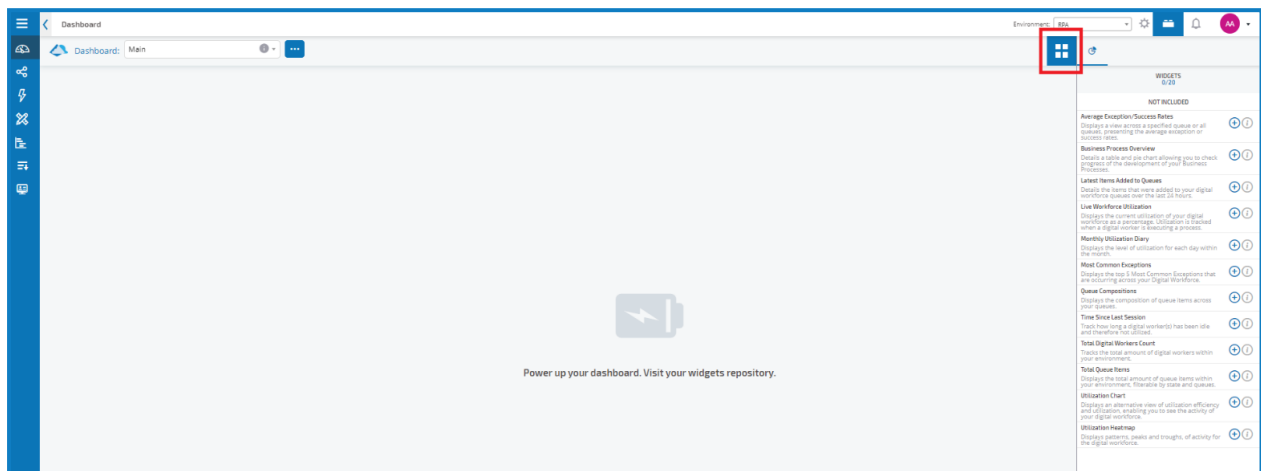
2. To view more details about a widget, click its information button. Information about what is displayed when the widget is added to the dashboard and how it can be customized displays.


3. Click the + button for a widgets to add it to the dashboard.

4. Once you have added the widgets required, click the widget repository button to see your full dashboard again.

Configure widgets

Move widgets by dragging and dropping to the required position on the dashboard. Widgets can also be resized by grabbing the bottom right corner and dragging to fit to the size required.
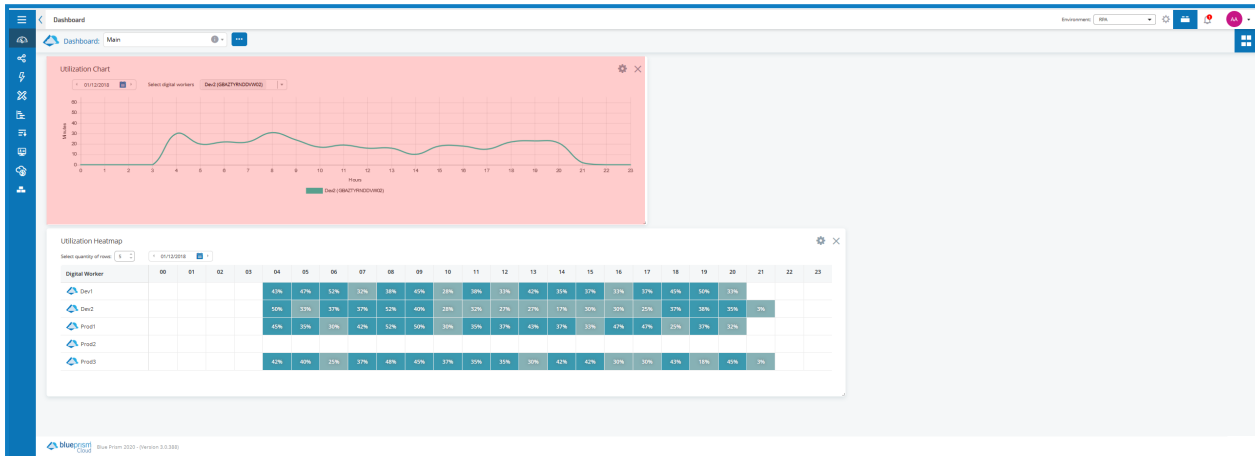
Many of the widgets are customizable – select the settings cog for a widget to access the settings.
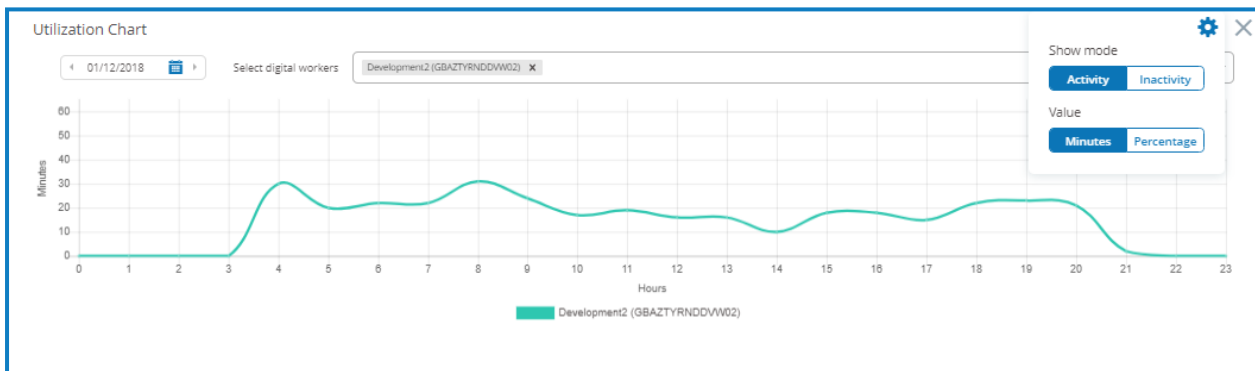
To remove a widget from a dashboard, select the cross for the required one.

Platform Management plugins

Digital Worker Settings

The Digital Worker Settings plugin allows you to customize the digital workforce applying more friendly names and avatars to your workers.
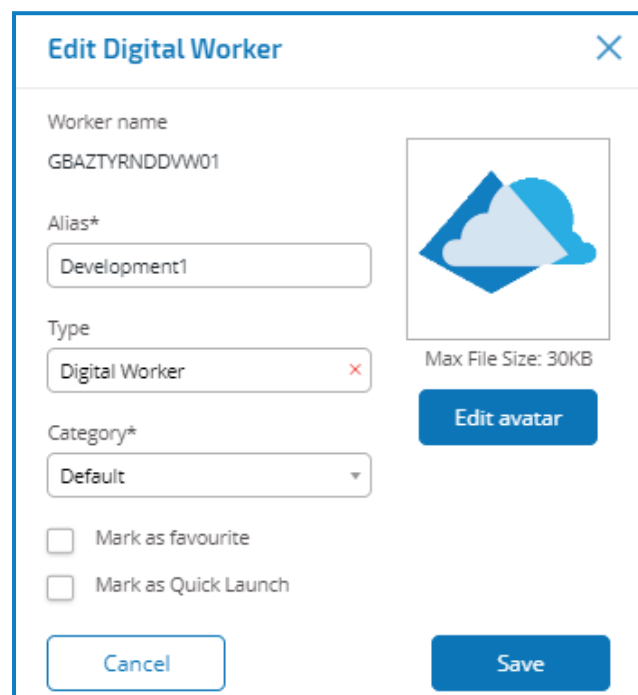
The action button allows you to choose between edit and retire. The retire feature allows you to remove the digital worker from the workforce, taking it offline so that, for example, maintenance can be performed.

> The retire function should be used when you are performing maintenance updates on a digital worker. This plugin should only be allocated to trusted users. Allowing a user to take a digital worker away from your digital workforce could have a serious impact on your business.

If edit is chosen the user can customize the way that the digital worker is referred to by assigning a friendly name as an alias, setting a type, this is essential if it is to be recognized in other plugins, assigning the workers into categories, making them one of your favorite digital workers and assigning an avatar to make it easily recognizable.

Save will keep any changes whilst the cancel will leave the settings as they were.

License Manager

The License Manager plugin provides a simple user interface to upload and control your RPA license.

Simply choose the 'Upload a new license' button which opens a file explorer window for you to navigate and locate your license file that Blue Prism Cloud will have sent you. Once uploaded, a panel will appear showing you the details of your license.
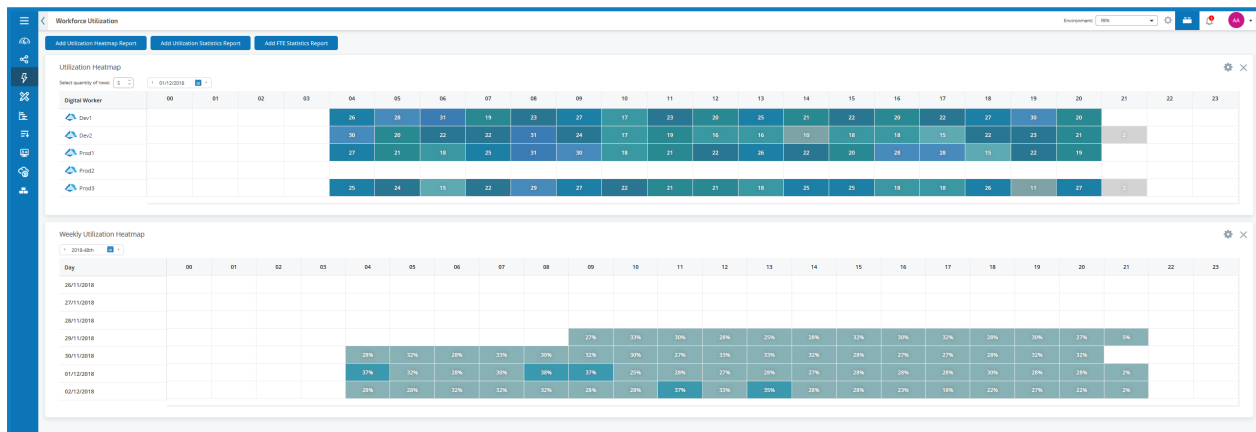
Digital Workforce plugins

Utilization

In the utilization plugin you can display three graphs of information that are perfect for management reports.

Utilization Heatmap

Click on **Add Utilization Heatmap Report**, enter a date and select whether this is for that day (Daily), Weekly, Weekly Split or a Monthly view. Additional utilization heatmaps can be added with different parameters to produce the report for your manager.

Add Utilization Statistics

The add utilization statistics report allows you to do the same comparison reports for the digital workforce but detailing statistical usage information. In the production digital workforce this information is vital to help improve the efficiencies of your digital workers.

If certain automations can be delayed by running outside of peak periods, then that will approve the overall performance of your digital workforce. During peak periods the digital workers not only need to compete with each other for applications and services, but human workers also utilizing the systems and networks.
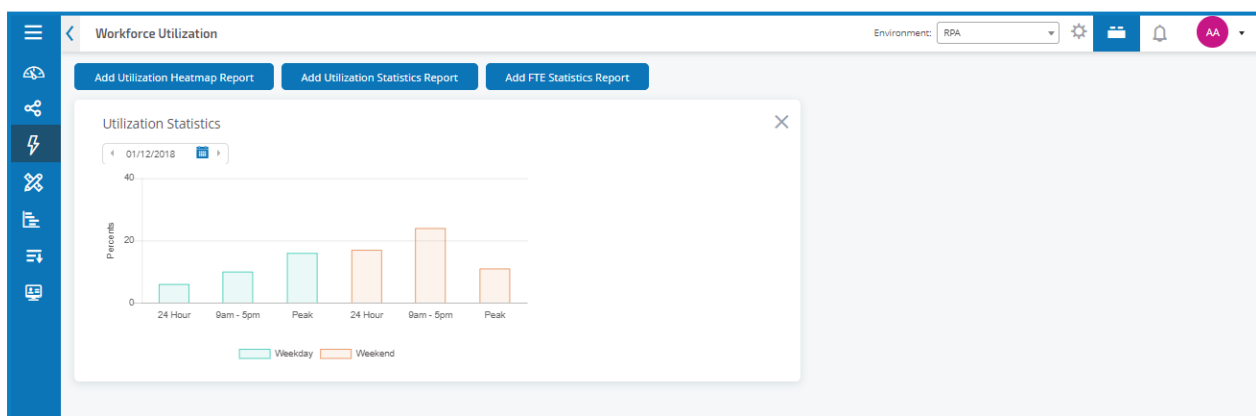
FTE Statistics

FTE statistics report, compares a digital worker against a Full Time Equivalent (FTE) human worker.

In a production digital workforce, the digital workers can be busy 24 hours a day showing how they can 'out work' the human worker. The human worker is expected to only work 09:00 to 17:00 per day, and then not weekends. This is then estimated as 6.5 productive hours per working day. Comparing this to the

digital workers who can work 24 hours a day, 7 days a week means that the digital workers comparison to a FTE is significantly different.
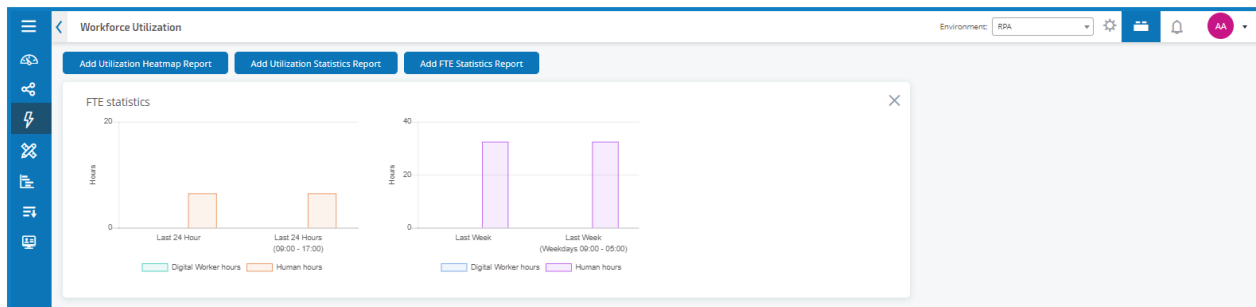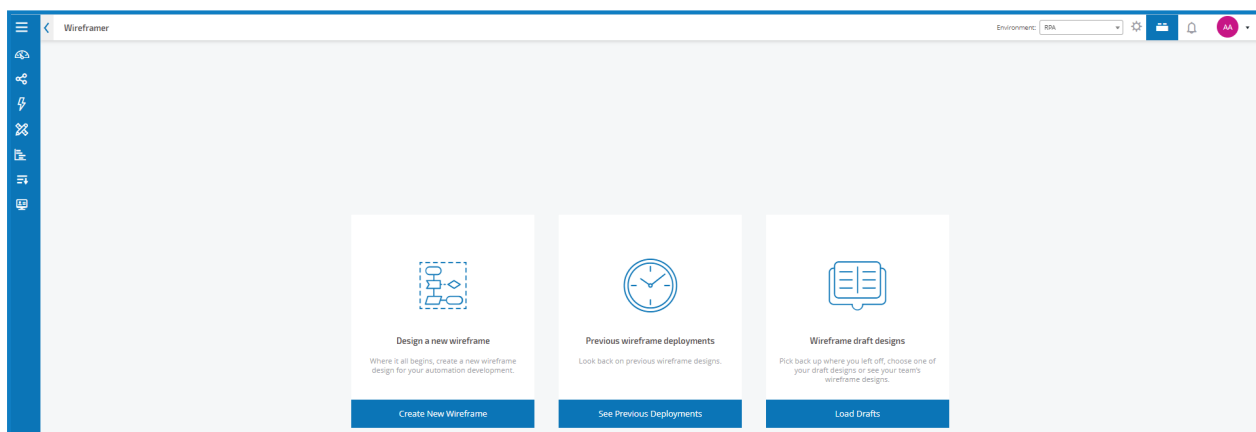

It should also be noted that when creating your utilization reports you can choose a mixture of reports, combining heatmaps with statistical reports as required.

Design Studio plugins

Wireframer

The Wireframer plugin allows you to efficiently define business objects that can be used as part of an automation process.

The benefits of designing using this methodology is that it allows the developer to rapidly deploy business objects and actions that will form the structure of the business process being automated.

The simplicity in the plugin allows the definition of these business objects and actions, along with best practice techniques, to ensure that enterprise grade automations are always built.

For more information see the Wireframer user guide.

Process/Object Explorer

The Process/Object Explorer plugin details all the Processes and Objects in the current environment. Within Process/Object Explorer you can view the XML code, Delete, Retire or Expose the Process/Object. The action button controls the actions that can be attributed to the object or process.

> Care should be taken when retiring or deleting these items. Objects can be used in multiple Processes, so deleting an Object when it is only in one Process may be fine, but it may break another Process if that utilizes the same Object.

The Expose option will expose the process/object as a web service. This allows the process/object to be interacted with through a web service call such as SOAP or WSDL web-based services. It enables a third party to invoke the process remotely, providing a mechanism for a third party to put work items into a work queue.

If a process/object is already exposed the context sensitive menu will change to "Conceal" to enable you to hide the process/object if required.

Remember use the settings to change the column layout to show the display you require. Then you can save the layout as one of your favorites.

Use the send report option to email a report to your mailbox.

Environment Data Items

Environment Data Items are defined variables that are used globally through the environment, whether it is in a production or a development environment. The environment data items can be managed within Hub, including creating, editing and deleting.

To explain the use of an environment data item, consider the following example. a data item is required to reference a filename and directory location, the filename and directory changes on a month by month basis to reflect the reporting period. Rather than the Automation Developer going in to change the automation each month or year, the Operator can control this through Hub by setting this as an environment data item and updating as required as an operational task.

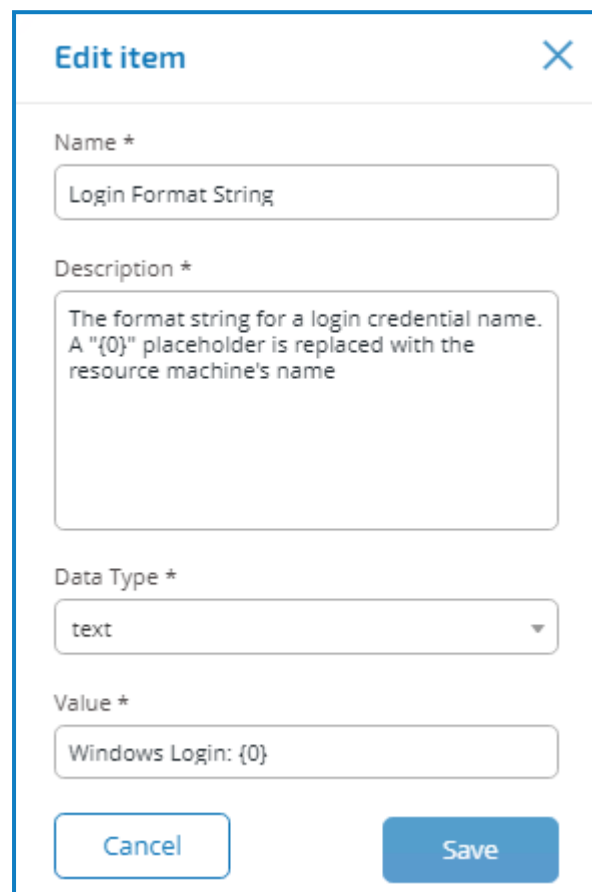Examples of environment data items could be any of the following:

- A file path to a file used in an automation
- A file/directory path to save information into
- A URL for a browser-based application
- Email addresses for who to send reports to
- Global timeout values for an application so they can be amended easily

New environmental data items are added by selecting the Add new button.

Provide a Name and Description for the environment data item. It is important to Name the environment data item something so that it can be linked to the process or application it is related to.

Choose a specific data item format, this could be text, password, number, flag, data, datetime, time, timespan, or an image.

Set the value for the environment data item and then press save to store your settings. An example Environment Data Item is illustrated below.


The action button corresponding to the environment data item will allow you to edit the item or if required delete it.

Environment Locks

An Environment Lock is a lock to stop two digital workers accessing an item at the same time. Imagine a scenario where an automation requires to write into a text file for example. The last thing you want is two digital workers running a split second apart, writing different pieces of information and saving the file so that one either corrupts or overwrites what the other digital worker has just written.
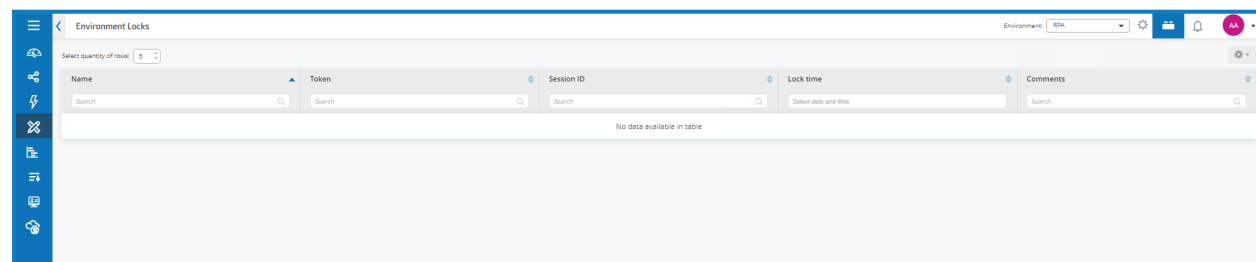
The Environment Lock stops this. By locking the file, the other digital worker cannot access the file until it is unlocked which is when the first digital worker has finished processing the file.

An Environment Lock is set using an "Acquire Lock" action in an automation. This will stop two digital workers accessing the item the lock is applied to.

Should the system fail, for example a network or application failure. The lock would remain in place. The lock can be viewed in environment locks.

To remove the lock should a failure occur, go to Blue Prism into the System area. Then under Workflow you will find the Environment Locks, showing all the locks and their status. Select the lock you wish to remove, then press Remove Lock to remove the lock.

Automation Lifecycle Management plugins

Automation Lifecycle Management

The Blue Prism 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 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'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 today provides the following functionality:

- Process Documentation
- Exception Tracking
- Automation Design and Development
- Process Sign-off and Approval

The ALM plugin provides a framework for business analysts to capture the process definition of the business process, delivering exception handling in a consistent manner and a review and sign-off structure.
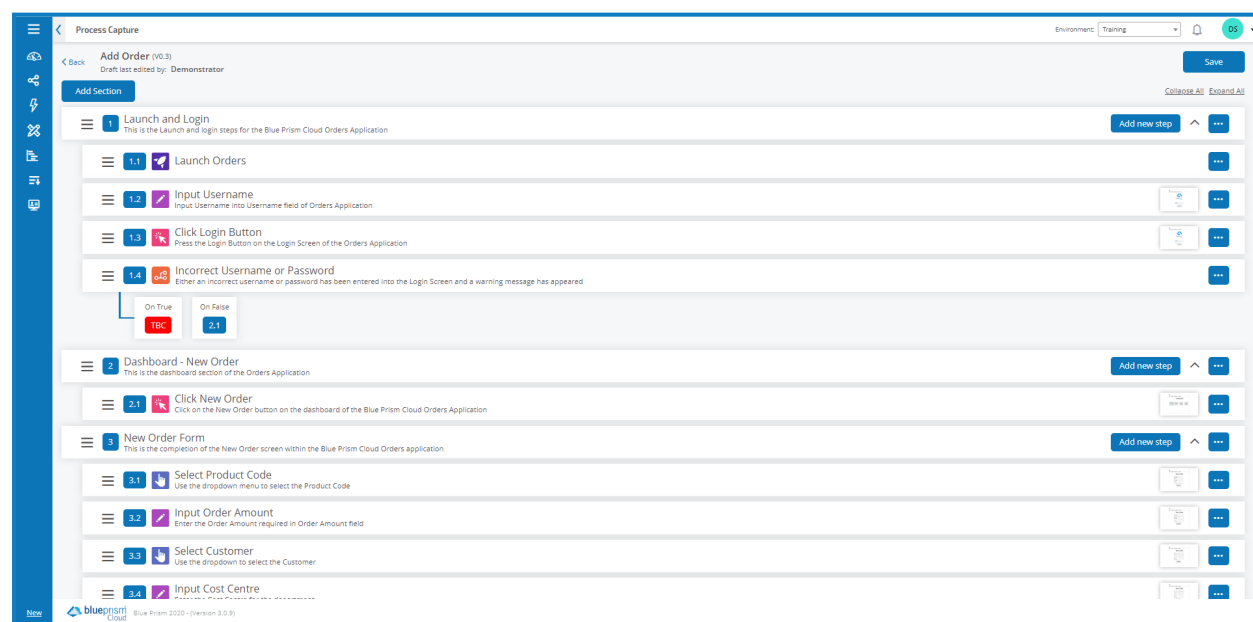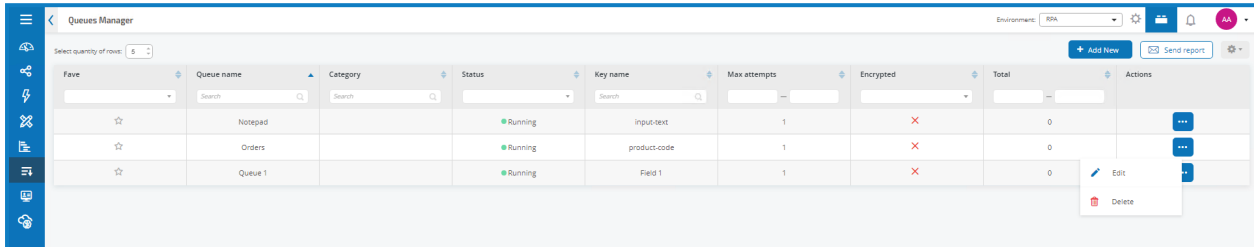

For more information, see the Automation Lifecycle Manager.

Queue Management plugins

Queue Manager

Using the Queue Manager plugin, a user is able to manage the work queues within Blue Prism. A user can add new, edit existing, or delete queues using the Queue Manager plugin.

To add a new queue, select the Add New button. The first field is the Queue name you want to create.

Next is an optional field Category. The Category will allow you to filter on specific queues. You can create a new Category by typing a name in the field and it will be automatically created. If the Category you want to use already exists, select the dropdown arrow and start typing the Category name until the one you want appears and then select it.

You can set the status of the queue choosing between Running and Paused.

The Key Name field allows you to set a specific key name for the queue. The key name can be used to directly correlate to a column name in a collection stage. This way as items are processed through the collection the name will appear in the queue management area.

The Max Attempts is defaulted to 1 attempt, though this can be increased if you want an item in a queue to attempt to be processed multiple times.

Finally, if the queue is holding sensitive data you can select the Encrypt flag to encrypt the queue contents.

Save creates the queue with the parameters you set. Cancel, returns you back to the queue manager display.

The action button corresponding to the queues allow you to edit or delete them.

The edit option brings up the same form as the Add new queue form. Here you can adjust any parameters you have set.

The delete option will prompt you before actually deleting, checking that you do actually want to remove the queue. Note, the queue must be empty before it can be deleted.

The user can use the send report option to send a report to the logged on user's mailbox of the queues in operation within Blue Prism.

Interact plugins

> The Interact plugin is an optional service that require an additional license key to operate and forms part of the Interact service offering.

Forms

As a digital workforce expands the addressable use cases of an enterprise, there is a further need for digital workers and humans to collaborate in the end-to-end execution of a business process. In addition, innovative ways of assigning work to a digital workforce are required to provide flexibility on who can interact with the resource. Blue Prism Interact provides new and existing Blue Prism users with a collaboration interface for an end users interaction with their digital workforce within a business process. Initiate, verify, receive and authorize varied work related to your business processes. In addition, Blue Prism Interact reduces the skill criteria required by allowing users to create dynamic web interfaces either by using the no-code form designer or using a Blue Prism Visual Business Object (VBO) to create forms based on the business process requirements.


Blue Prism Cloud Interact functionality is split across two Blue Prism Cloud components; firstly, a developer utilizing Hub and the Forms plugin to create and publish Forms for an end user to utilize; secondly the end user interface where they can, by utilizing published Forms, interact with the digital workforce. A full user guide detailing the features and functionality of Interact is available as a separate download.

The Interact user guide will cover the administration aspects of Interact Forms, including how to assign a Form Role to a user and configuring a user to be an Interact Approver.

Cognitive plugins

Natural Language Understanding (NLU)

The Blue Prism Cloud Natural Language Understanding (NLU) plugin allows processes leveraging naturally formed language to be classified to an action referred to as an 'intent'. NLU leverages natural language processing as part of its capability, meaning that information can be analyzed and context derived without the need for 'hard-coded' key word matching – furthermore, non-standard language can also be processed, overcoming spelling mistakes. NLU allows intents to be linked to processes or drive process decisions.
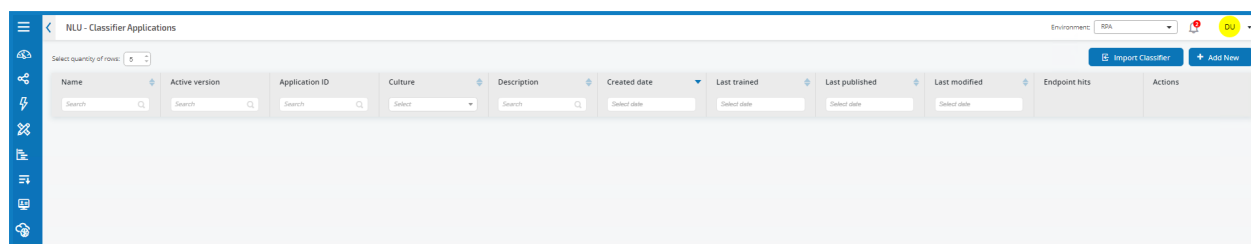
The use of NLU as part of a project is usually considered once the client or partner has deployed an initial set of processes. There are a number of areas to learn and interpret which make it a less likely component to be used in an initial phase. When processing unstructured data such as inbound emails or case records, qualification is key to set the appropriate expectation with the client – where the language to be processed is domain specific, the client Subject matter Expert (SME) involvement in the provision of training data sets and ongoing training is mandatory for a successful outcome.

A separate NLU user guide covers the configuration and set up of NLU.

Hub restrictions

The following table list the restrictions enforced when using Hub

Item	Restriction
Password Restrictions	Passwords must be: • At least 1 upper-case • At least 1 number • At least 1 special character • At least 8 character length
Avatar Image	Less than 1MB and no greater than 1920 x 1080 pixels
Dashboard Image	Less than 30KB in size and no greater than 200 x 200 pixels
Dashboard Widgets	Limited to 20 widgets per dashboard
Brand Logo	PNG, JPEG or JPG no greater than 30KB
Spinner	PNG, JPEG or JPG no greater than 30KB
Login Background Image	Less than 5MB and no greater than 1920 x 1080 pixels
Register Background Image	Less than 5MB and no greater than 1920 x 1080 pixels
Favicon	ICO or PNG no greater than 5KB
Inline Image	Less than 30KB and no greater than 305 x 80 pixels