



# Interact 3.0

## User Guide

Document Revision: 1.1



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Blue Prism Cloud Limited, 2 Cinnamon Park, Crab Lane, Warrington, WA2 0XP, United Kingdom.

Registered in England: Reg. No. 8534024. Tel: +44 870 879 3000. Web: [www.blueprism.com](http://www.blueprism.com)

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## Interact

This user guide covers the Blue Prism Cloud Interact product. The guide is broken into five separate sections to explain the operation of Interact, these are:

- [Administrator access](#)
  - The administrator responsibilities of Interact, which covers configuration and settings;
  - Branding and customization capabilities of Interact supporting alignment to an organization's own corporate colors and brand images.
- [Establishing communication](#)
  - Establishing communications between Interact and Blue Prism Design Enterprise. Including configuring a queue and API, creating a process form and submitting a request.
- [Interact controller](#)
  - Using the Interact Controller to retrieve items from Blue Prism Design Studio into Interact.
- [Interact elements](#)
  - Details of each of the Form elements available to the developer.
- [Interact restrictions](#)
  - Details of the Form element restrictions and the user rights.

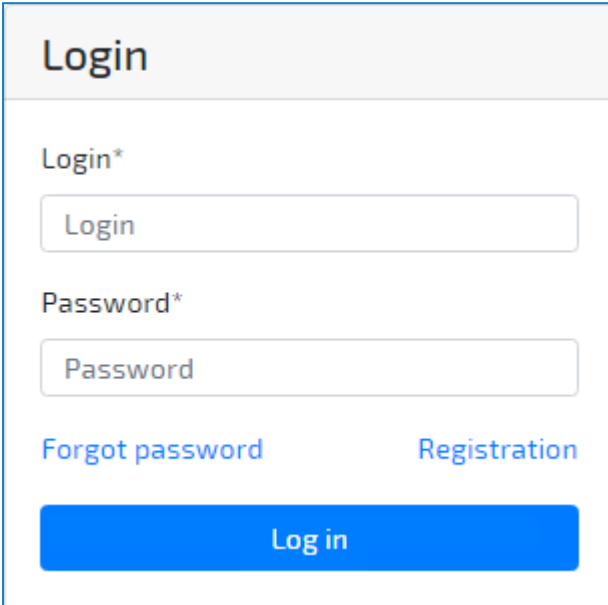
The Interact product is a customizable web portal, accessible from any computer or mobile device via a browser. It enables organizations to present processes for user initiation or to involve users within parts of a process that are otherwise automated. Interact acts as both an interface for tasks initiation and a presentation layer for any information that needs to be presented back to a user. It is deployed in a client-specific, multi-faceted configuration, and therefore Interact can give a highly customized look and feel to each user within an organization's internal or external user base, based on their configuration. Interact provides a mechanism for organizations to put online their service catalog of processes.

## Administrator access

Administrator access to Interact is configured on a different URL to the main URL that standard users enter through.

1. In a browser, enter the administrator URL – this is typically in the format *https://[hostname]:[port\_number]/admin*.

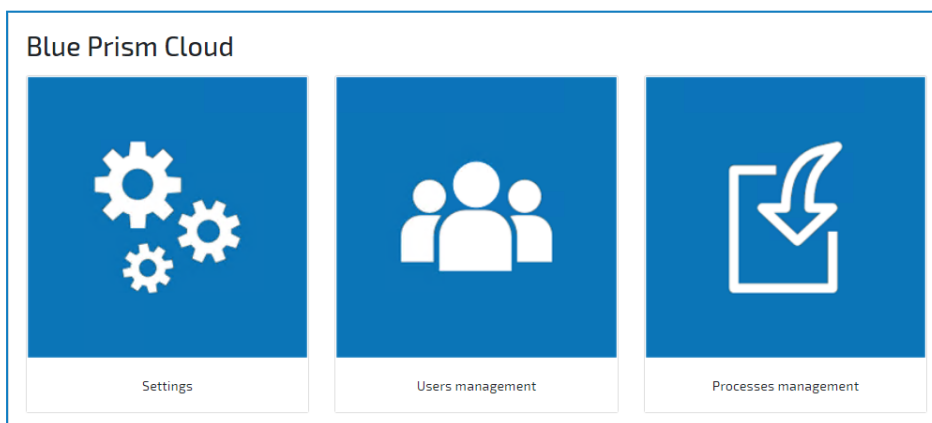
The login dialog displays.

The login dialog box has a light gray header with the word "Login" in bold. Below the header, there are two input fields: "Login\*" and "Password\*", each with a corresponding label. Below the "Login\*" field is a text input box with the placeholder text "Login". Below the "Password\*" field is a text input box with the placeholder text "Password". Below the input fields, there are two links: "Forgot password" and "Registration". At the bottom of the dialog is a large blue button with the text "Log in" in white.

If you are using Internet Explorer as your browser and the login page is not displaying as shown above, ensure that **Display intranet sites in Compatibility View** is turned off in **Compatibility View settings**. This is found under the Tools icon in Internet Explorer.

2. Enter your credentials and click **Log in**.

The main Admin dashboard displays. The main administrator's dashboard is where the connectivity to Blue Prism Enterprise, User management and process form process management is performed. The administrator does not have a service catalog view of processes available to them like a user, they are responsible for configuring the environment to ensure that the organizations connectivity is established correctly and for creating the activities to be initiated within a digital workforce via the created forms.

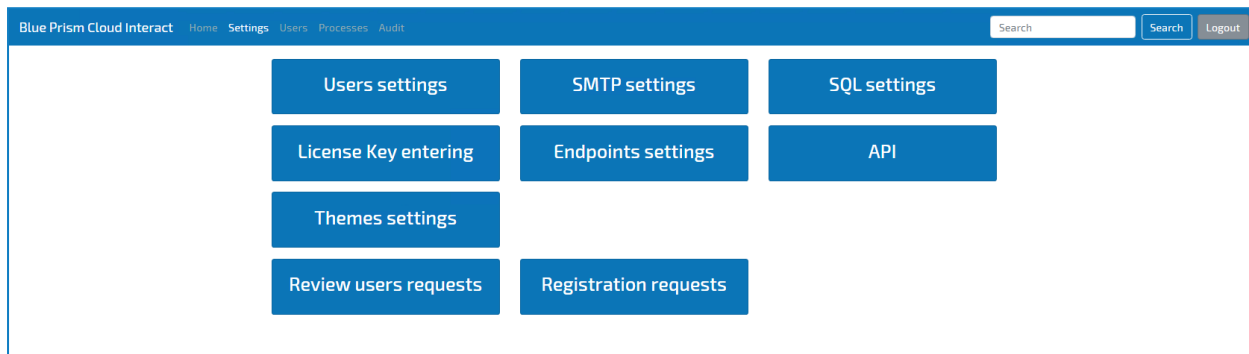


3. Select the required option:

- [Settings](#)
- [Users management](#)
- [Processes management](#)

## Administrator settings

In the settings there are nine options available.



### Users settings

Users settings allows administrators to use the organization's LDAP environment, active directory, to authenticate the users. Alternatively, this can be overridden and users can access using a forms-based mechanism, supplying standard login name and password to authenticate themselves.

An Active Directory account that has access to their appropriate Organization Unit (OU) is required as is an admin account for the domain controller.

## LADP settings

### Users settings

#### LDAP settings

☒ LDAP ON Sync

LDAP Connection String\*

User ID\*

Password\*

#### User registration settings

☒ Auto approve ON

Default user groups\*

Ok Cancel

LADP ON/OFF	To import users from Active Directory you will need to enable LDAP.
LADP Connection String	An LDAP connection string in a similar structure to: LDAP://gbaztwdc01.interact.com/OU=Users,DC=Interact,DC=com
User ID	The admin username for the domain controller.
Password	The admin password for the domain controller.

### User registration settings

Auto approve ON/OFF	Automatically enables the user for the Interact environment. The user when registered will be created into the Auto-Approve group that you establish. The user will always be approved and the user will gain the roles or roles that you have configured.
Default user groups	The default user group for approving and declining registration requests. The information configured for the user will define access, users are entered into groups, so they only get the processes they are entitled to
Sync	Once the LDAP connection string has been configured clicking Sync synchronizes users from the Active Directory into Interact.

## SMTP Settings

The SMTP settings are used to configure the mail environment.

SMTP host	The fully qualified domain name of the SMTP host used to send Interact notifications through.
SMTP port	The SMTP port configured on the SMTP host.
Username	The username to access the account on the SMTP host.
Password	The password for the account on the SMTP host.
Sender's email	Email for the notifications that are sent from Interact – users would also email this account to request a password reset.

The Interact environment supports both SMTP and Office 365 email integration. For an Office 365 email account, use the following settings:

- SMTP host: smtp.office365.com
- SMTP port: 587

### SMTP settings

SMTP Host\*

smtp.office365.com

SMTP port\*

587

Username\*

robot.worker@blueprismcloud.com

Password\*

Password

Sender's email\*

robot.worker@blueprismcloud.com

OkCancel



## SQL Settings

This feature and associated functionality is now End of Life. This capability has been withdrawn from future versions of the product and therefore should not be used.

### License key entering

The license key entering button is where the license key for the Interact application is entered.

**License Key entering**  
License Key\*  
  
Customer Name\*

## Endpoint Settings

The endpoint settings are where connectivity between Interact and a Blue Prism Enterprise instance is established. This enables data to be transmitted to and from Interact either for the initiation of a process or as part of a digital worker and human collaboration.

URL	The URL of the API (https://[IO-Machine-name]:[IADA port]/iada.svc/WorkQueues)
Username	The username of the Web Service Manager account (ws) credentials that was set up in Blue Prism Enterprise.
Password	The password for the above account.

### Endpoints settings

Sync

#### Endpoint list

- Queue 1

#### IADA Service configuration

URL\*

https://gbaztrimg01:8443/iada.svc/WorkQueues

Username\*

tradmin

Password\*

Enter password to authorize on IADA service

Ok

Cancel



## Inbound API Management

This section allows access for an external source to manipulate aspects of Interact forms through an API to be configured.

Api management

Add Api client

Filter

ID ^	Username	Password	Key	
6	mainapi	S3cret!Passw0rd	A97C070318A1E9B5D333604E6E51A69192C9E1C6D D56C0E285492B543123FD	 

1 total

To ensure a secure connection an API key is generated which can be used to ensure authentication is from the trusted source.

Enter an user name of api client\*

Enter an user name of api client

Enter a password of api client\*

Enter a password of api client

Confirm password\*

Confirm password

\*Api Key will be generated automatic







Ok

Cancel

## Theme Settings

Interact can be fully configured to match an organization's corporate colors. An organization's logo and imagery can also be added to replace the default imagery provided. This is all configured through the theme settings.

The screenshot displays the 'Themes settings' page. At the top right is a 'Create new theme' button. Below it is a search bar and a 'Filter' button. A table lists the available themes:

Name	
✓ Thoughtonomy	 
Interact	   

A footer bar at the bottom indicates '2 total'.

The default Blue Prism Cloud theme cannot be deleted but can be edited if required. Alternatively, new themes can be created and changed to match an organization's branding.

Click **Create new theme**, enter a name for your theme and click **OK**.

The User dashboard settings displays.

Use the tabs to configure the following settings:

## General elements

All images must be JPEG or PNG files and adhere to the following specifications:

- **Banner** – Select to use either an image banner or one from YouTube. Banner images must be the image must be 1920 x 400 pixels.
- **Footer logo** – Select an image no bigger than 2MB with a maximum height of 100 pixels and maximum width of 400 pixels.
- **Favicon logo** – Four pixel sizes are required for the favicon: 32 x 32, 57 x 57, 72 x 72, and 149 x 149.
- **Spinner logo** – Select an image no bigger than 30KB, Max size is 200 x 200 px.

The screenshot shows the 'User dashboard settings' page. At the top left is a yellow 'Back' button. Below it, the theme is set to 'Interact' with an 'Edit' button. There are three tabs: 'General elements' (active), 'Color settings', and 'Language settings'. The 'User dashboard settings' section has a 'Save' button on the right. It contains four sections: 1. 'Banner' with radio buttons for 'No content banner', 'Image banner' (selected), and 'Youtube video banner'. Below is a text input 'Interact - Banner.jpg' and a 'Choose file' button. 2. 'Footer logo' with a text input 'BPC 400 x 100.png', a 'Choose file' button, and a red 'Remove' button. 3. 'Favicon logo' with a text input 'favicon.png', a 'Choose file' button, and a red 'Remove' button. 4. 'Spinner logo' with a text input 'spinner.png', a 'Choose file' button, and a red 'Remove' button.

[Back](#)

Theme: **Interact** [Edit](#)

[General elements](#) [Color settings](#) [Language settings](#)

### User dashboard settings [Save](#)

☐ No content banner

☒ Image banner

☐ Youtube video banner

Interact - Banner.jpg [Choose file](#)

---

#### Footer logo

BPC 400 x 100.png [Choose file](#) [Remove](#)

---

#### Favicon logo

favicon.png [Choose file](#) [Remove](#)

---

#### Spinner logo

spinner.png [Choose file](#) [Remove](#)

## Colour settings

Change the color palette to match your organization's branding by applying the required colors for the elements under each of the following categories:

- Base Color Settings
- Table Color Settings
- Dashboard Color Settings

[Processes](#)
[Audit](#)

[Back](#)

Theme: **Interact**
[Edit](#)


[General elements](#)
[Color settings](#)
[Language settings](#)

### Theme settings

[Reset to default](#)
[Save](#)

#### Base color settings

Header background
Header text
Header text active
Header text hovered
Footer background
Footer text
Background
Logout button




Header name Selected Not selected

Search Logout





thoughtonomy Version:

#### Table color settings

Table header background
Table header text
Table even row
Table odd row
Table even row text
Table odd row text
Table footer background



Selected Not selected

Name	Phone	
Jane Doe	888-555-1212	 
Justin Doe	877-123-1212	 
2 total		

## Language settings

Select a language for a theme. Interact supports various languages and when this theme is used, Interact will display in that language to the user community.

Back

Theme: Interact

Edit

General elements

Color settings

Language settings

Language settings

Create new language

Filter

Name ▾

✓ English

1 total

## Review users requests

Before a process form is submitted it can be sent to a supervisor for approval. These user requests to check the data prior to it being added to a queue for processing arrive in the Review users requests section.

### Review users requests

Request ID

User Name

Process Name

Category Name

Submission time ▼

Request ID	User Name	Process Name	Category Name	Submission time ▼	
10487	Trainee	Maths	Production	2019-12-23 04:53:58	<input type="button" value="Open"/> <input type="button" value="Decline"/> <input type="button" value="Approve"/>

1 total

The administrator, or a designated supervisor can then open the request and then choose to approve or decline the request.

## Registration requests

Users can request access to the organization's Interact through the Registration link on the main. These requests will be submitted for approval and will arrive in the Registration requests. Before a user can gain access, the administrator must approve the request. Once approved the account will be established and an email sent to the user with a one-time link to set up their password.

### Registration requests

User Id ▼

User Name

Email

No data to display

0 total



## User management

The User Management screen allows you to create, modify and delete user access. This administration area is used to control the required roles and groups. By assigning restrictions to roles and groups, users will only be presented with the processes that are relevant to them.

Users management

Manage groups

Add a new user

App users

LDAP users

All statuses ▼

yyyy-mm-dd

Filter

User ID	Username	Status	Groups	Last logged in	
1	Admin	Active	TWP Administrators	2019-01-23 10:22:49	
2	Trainee	Active	TWP Administrators, Development Group	2019-12-23 04:46:38	
7	Demonstrator	Active	Developers	2019-12-03 08:32:55	

3 total

## Users

To create a new user a unique username, first and last names, and an email address are required. Optional information such as Date of Birth, Department and Company can also be provided. The role and user groups will need to be assigned to ensure that the user can access the authorized Process Forms. Additionally, a customized theme can be applied if required.

Cancel

Add new user

Save

User name\*

Enter User name

First name\*

Enter First name

Last name

Enter Last name

Date of birth

01/01/1993

Department

Select Department

Company

Enter Company

Email address\*

Enter Email

User groups

User role

✕ User

Theme

General system theme ▼

Status

Active ▼



## Groups

Groups allow users to be managed in specific defined organizational units to help control the management of process forms to specific users. Once created the user can be added to that group in the user dialog.















### Manage user groups

[Add a new group](#)

All ▼

yyyy-mm-dd  

[Filter](#)

Group name	LDAP Sync	Last updated	
TWP Administrators	New	2018-12-19 05:16:54	 
Development Group	New	2019-03-21 02:25:44	 
Developers	New	2019-04-30 12:08:56	 
Staging	New	2019-08-22 01:00:17	 
Customer Services	New	2019-09-20 08:18:28	 
RPA	New	2019-09-20 08:18:28	 
BPreRelationship Only	New	2019-09-20 08:18:28	 

7 total

## Processes management

This area shows the processes that have been created, those that are seeking approval before release and those that are available for interaction by Interact users.



### Processes management

[Users requests](#)[Manage categories](#)[Create new process](#)[Import process](#)









































[Live](#)[Archived](#)

All categories ▼







yyyy-mm-dd



Filter

Name	Category	Last updated	
Maths	Production	2019-12-23 04:53:24	   
Home Move	Production	2019-12-04 10:06:10	   
Add Order - Executor	Internal Tools	2019-11-21 04:17:08	   
IADA.ai Skills Process	Production	2019-11-21 04:16:54	   
Order System	Production	2019-11-21 04:11:01	   
Chatbot	Development	2019-11-21 04:08:24	   
Translator	Production	2019-11-21 04:06:48	   
BPSS Check	Production	2019-11-21 04:06:36	   
Notepad	Production	2019-11-21 04:06:23	   
Electric Bill	Production	2019-11-21 04:06:06	   

12 total



In the main process management screen administrators can choose to edit or archive existing processes, review requests from users for approval and of course create new processes.

It is not possible to delete processes, they are archived to ensure that they can be used for audit purposes.

## User requests

User requests provides operators the capability to view processes that have been created and submitted for approval. This is to support with the trouble shooting of issues and to see a historical view of service requests completed by a user.

### Users requests

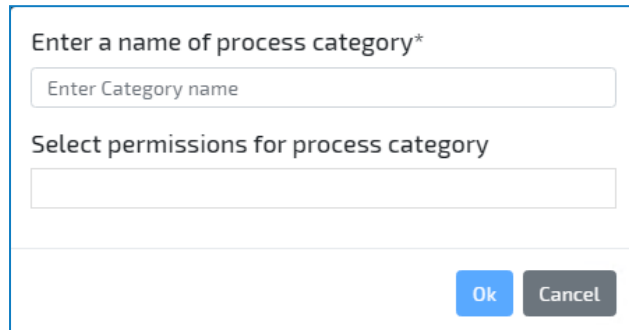
Export requests to CSV

User name	Process name	Category	Submitted date ▼	
Trainee	IADA.ai Skills Process	Production	2019-12-23 04:36:52	<a href="#">Open</a>
Trainee	IADA.ai Skills Process	Production	2019-12-23 04:35:41	<a href="#">Open</a>
Trainee	Home Move	Production	2019-12-23 04:27:07	<a href="#">Open</a>
Trainee	Home Move	Production	2019-12-23 04:02:56	<a href="#">Open</a>
Trainee	Home Move	Production	2019-12-23 03:58:18	<a href="#">Open</a>
Trainee	BPSS Check	Production	2019-12-23 03:43:35	<a href="#">Open</a>
Trainee	BPSS Check	Production	2019-12-23 03:39:14	<a href="#">Open</a>
Trainee	Translator	Production	2019-12-23 02:11:16	<a href="#">Open</a>
Trainee	Home Move	Production	2019-12-05 11:37:49	<a href="#">Open</a>
Demonstrator	Home Move	Production	2019-12-03 08:33:10	<a href="#">Open</a>
11 total				<a href="#">◀</a> <a href="#">1</a> <a href="#">2</a> <a href="#">▶</a>

## Manage categories

Manage categories enables administrators to set categories for groups of users. Categories are assigned to processes to determine which users can access the forms. This provides restrictions to ensure only appropriate users can operate what may be, for example, a process accessing sensitive data.

The image shows the addition of a new category.



The image shows a dialog box for adding a new process category. It has a title bar and a main content area. The first section is titled 'Enter a name of process category\*' and contains a text input field with the placeholder text 'Enter Category name'. The second section is titled 'Select permissions for process category' and contains a list box. At the bottom right of the dialog are two buttons: 'Ok' and 'Cancel'.

Enter a name of process category\*

Enter Category name

Select permissions for process category

Ok Cancel

## Create a new process

Creating new processes supports the core deliverable of Interact in presenting users with an ability to collaborate with their digital workforce as part of an automated process. This is the area where administrators create the forms that enable the users to interact with automation processes and in turn populate the work queues.

Click **Create new process** to start the new process wizard.

The screenshot shows the 'Details' tab of the 'Create a new process' wizard. The form includes the following fields and controls:

- Name\***: Text input field with placeholder 'Enter Name'.
- Description**: Text input field with placeholder 'Enter Description'.
- Send Email**: Checkbox.
- Supervision**: Checkbox.
- Category\***: Dropdown menu with placeholder 'Select Category'.
- Priority\***: Text input field with placeholder 'Enter Priority'.
- SLA\***: Time picker with HH, MM, and SS segments, each with up/down arrows.
- Queue\***: Dropdown menu with placeholder 'Select Queue'.
- User groups\***: Text input field.
- Process Icon\***: File upload section with a 'Stock icons' button, a 'No file chosen' text, and a 'Choose file' button.

At the bottom of the form are three buttons: 'Cancel' (red), 'Next' (blue), and 'Save' (green).

The wizard includes four main areas, accessed in turn by clicking **Next**.

## Details

Name	The name of the process. Processes cannot be deleted, only archived and therefore the name must be unique as the same process name cannot be used if an archived process form already exists with that name.
Description	An optional description of the process.
Send email	A tick box to send an email to the user who is submitting the request.
Supervision	If the data submitted needs to be verified by a supervisor (approver) prior to submitting to a Blue Prism queue tick this box. The submitted request will appear in the Review users requests inbox of the approval.
Category	The category for the process that determines which users can access and operate the process. The <a href="#">category</a> must already exist before it can be used it a process form.
Priority	<p>This parameter is loaded into the work queue and Blue Prism Cloud Intelligent Automated Digital Assistant (IADA) utilizes this information to ensure that all the items in the work queues are processed with the associated priority. The parameters are assigned to the work item as a tag when it is added to the Blue Prism queue.</p> <p>Priority values are from 1 to 99, with 1 being the highest priority and 99 being the lowest.</p>
SLA	<p>This parameter is loaded into the work queue and Blue Prism Cloud Intelligent Automated Digital Assistant (IADA) utilizes this information to ensure that all the items in the work queues are processed within the defined SLA. The parameters are assigned to the work item as a tag when it is added to the Blue Prism queue.</p> <p>SLA range from 00:00:01 to 99:59:59.</p>
Queue	<p>Select the Blue Prism queue that the submitted request will be added to.</p> <div> <p>If you do not see the queue displayed, an administrator must synchronize the queues between Blue Prism and Interact in the End Point Settings.</p> </div>
User groups	The administrator can establish user groups so that individuals within different departments are identified. However, if the process form is not assigned to that user group the user will not see the form when they log into Interact.
Process icon	Assign an icon to help make the process easily identifiable in your organization's user community. You can add your own icon or use one of the stock icons. Icons must be a JPEG or PNG file and 400 x 400 pixels in size.

In this version of Interact the Priority and SLA fields are optional. However, please note that you either have to complete all the fields to submit a request with a Priority or SLA or you complete none of the fields if you want to submit a request without a Priority/SLA. Partially setting the Priority or SLA will stop the request being submitted to the queue.

## Form designer

The form designer gives the ability to structure a form to interact with the business process. The example below shows a leavers process service request.

The screenshot displays the 'Form Designer' tab within a process editor. At the top, there are four tabs: 'Details', 'Form Designer' (selected), 'Rules', and 'Roles'. Below the tabs, there are two main sections: 'Agent Input' and 'Validation Response', each with a pencil icon and a close icon. A blue button labeled 'Add new tab' with a plus icon is also present. The main workspace shows a form layout with several input fields and a right-hand panel of form controls.

**Form Fields:**

- Customer Reference Number
- Customer Post Code
- Family Name
- Planned Moving Date
- Empty Space
- Post Code for new address
- House Number for new address
- Street Name for new address

**Form Controls Panel:**

- File
- Hyperlink
- Empty Space
- Multiline
- Paragraph
- Date
- Time
- Password
- Email
- Number
- Radio Group
- Select
- Text Field
- Text Area
- Checkbox Group
- Image Upload

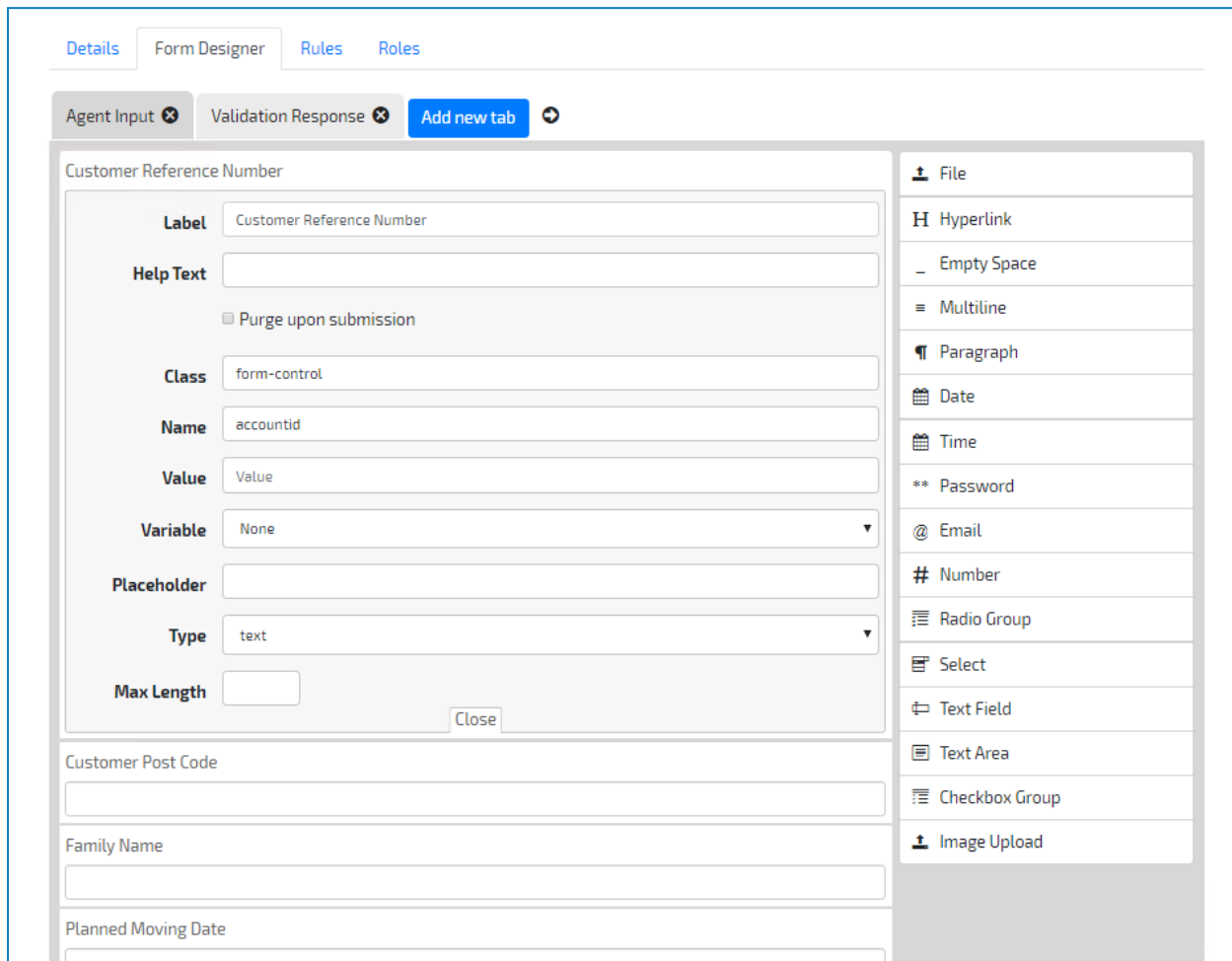
At the bottom of the form designer, there are four buttons: 'Cancel' (red), 'Back' (grey), 'Next' (blue), and 'Save' (green).

Multiple tabs can be created in a process. Each of these tabs can be controlled by rules, so for example the HR tab of the service request would only be available to those within the HR group.

Click the 'pencil mark' to rename a tab. Select the 'tick' to accept the changes you make or a the 'X' to cancel.



Tabs are populated by dragging items from the right-hand menu of create elements. Each of these can then be configured dependent on their functionality, allocated a label and help text descriptions to help the user completing the form.



The screenshot displays the 'Form Designer' tab in the Interact interface. At the top, there are tabs for 'Details', 'Form Designer', 'Rules', and 'Roles'. Below these, there are buttons for 'Agent Input', 'Validation Response', and 'Add new tab'. The main area shows a form with the following fields:

- Customer Reference Number:** A text field with a label 'Customer Reference Number', a 'Help Text' field, a 'Purge upon submission' checkbox, a 'Class' field (set to 'form-control'), a 'Name' field (set to 'accountid'), a 'Value' field (set to 'Value'), a 'Variable' dropdown (set to 'None'), a 'Placeholder' field, a 'Type' dropdown (set to 'text'), and a 'Max Length' field. A 'Close' button is at the bottom right of this section.
- Customer Post Code:** A text field.
- Family Name:** A text field.
- Planned Moving Date:** A text field.

On the right side, there is a vertical menu of form elements that can be dragged into the form:

- File
- Hyperlink
- Empty Space
- Multiline
- Paragraph
- Date
- Time
- Password
- Email
- Number
- Radio Group
- Select
- Text Field
- Text Area
- Checkbox Group
- Image Upload

For a full list of form elements see [Interact elements](#).

## Rules

Rules are configured by creating IF, THEN, ELSE statements. Completed on a per tab basis, they allow the display of a form to be controlled for specific groups of users.

The screenshot displays the Blue Prism Rules configuration interface. At the top, there are four tabs: 'Details', 'Form Designer', 'Rules' (which is selected), and 'Roles'. Below the tabs, there are two main sections: 'Agent Input' and 'Validation Response'. The 'Agent Input' section is currently empty. The 'Validation Response' section contains an 'IF' statement configuration. The 'IF' statement is defined by two conditions: 'Customer remaini...' (with a dropdown arrow) 'is' (with a dropdown arrow) 'FALSE'. The 'THEN' statement is defined by two actions: 'Early Contract Ca...' (with a dropdown arrow) 'is hidden' (with a dropdown arrow). A green '+' button is located below the 'IF' statement, and a red '-' button is located below the 'THEN' statement. At the bottom of the interface, there are four buttons: 'Cancel' (red), 'Back' (grey), 'Next' (blue), and 'Save' (green).

In the example above on the Validation Response tab, if the Customer remaining in the area is not true, then the Early Contract Termination field is hidden.

## Roles

Roles are assigned to the tabs in the process. This is for each field in each tab. Administrators can choose to make them mandatory, to hide them, make them read-only or optional, as illustrated below.

Details
Form Designer
Rules
Roles

Agent Input

Field name	Role
Customer Reference Number	Mandatory
Customer Post Code	Mandatory
Family Name	Mandatory
Planned Moving Date	Mandatory
Post Code for new address	Mandatory
Street Name for new address	Mandatory
House Number for new address	Mandatory





Validation Response

Field name	Role
Customer Contract Start Date	Read only
Customer Contract Term	Read only
Outstanding Fees (in £)	Read only

## Edit, clone, export, and archive processes

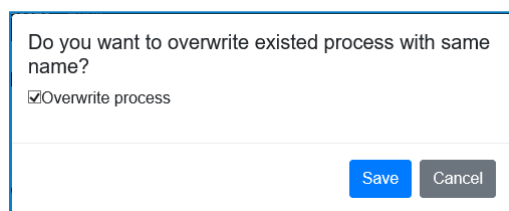
To safeguard all of your hard work the process form definitions can be exported. This is performed from the main process management section of Interact as illustrated below.

There are four options available to process form developers:

-  **Edit** – Continue to edit an existing process.
-  **Clone** – Duplicate an existing process which can then be edited.
-  **Export** – Export the process to a file.
-  **Archive** – Archive the process if it is no longer required.

By clicking on the export icon, the process form is captured by the browser and you are prompted to save and the file will be put into the browser download folder.

Click **Import process** to import exported processes. You will be prompted to overwrite the existing process.



Do you want to overwrite existed process with same name?

☒ Overwrite process

**Save** **Cancel**








## Audit

Audit data about system use is accessed from the Audit button from the main Interact toolbar. The following information is captured and stored:

- Successful logins
- Logouts
- Failed logins
- Creation of user
- Editing of user
- Creation of process
- Editing of process
- Creation of process category
- Submission of process
- Updating of license key
- Updating of SMTP settings
- Updating of LDAP settings
- Updating of SQL settings
- Endpoint synchronization
- External API calls

Log information is stored within an encrypted column within the Interact database.

## Audit

yyyy-mm-dd							<a href="#">Filter</a>
Time	User ID	Username	Entry Type	Category name			
2019-12-23 04:53:24	2	Trainee	Process updated	Process		<a href="#">Go to details</a>	
2019-12-23 04:46:38	2	Trainee	Login success	User		<a href="#">Go to details</a>	
2019-12-23 04:46:24	2	Trainee	Login success	User		<a href="#">Go to details</a>	
2019-12-23 04:45:11	2	Trainee	Logout	User		<a href="#">Go to details</a>	
2019-12-23 04:37:26			Update user process	Public api		<a href="#">Go to details</a>	
2019-12-23 04:37:25			Get user process by Id	Public api		<a href="#">Go to details</a>	
2019-12-23 04:36:52	2	Trainee	Process submitted	Activity		<a href="#">Go to details</a>	
2019-12-23 04:36:13			Update user process	Public api		<a href="#">Go to details</a>	
2019-12-23 04:36:12			Get user process by Id	Public api		<a href="#">Go to details</a>	
2019-12-23 04:35:41	2	Trainee	Process submitted	Activity		<a href="#">Go to details</a>	
2,318 total							    

## Establishing communication

This section of the help covers the integration elements that need to be in place for Interact to successfully send information to a Blue Prism queue, ready for processing.

To set up a process in Interact that inserts data to a queue, allowing an automation in Blue Prism to use the submitted data, there are several factors that need to be established for the data to be correctly passed from Interact to Blue Prism. To explain the configuration and the setup required to allow the interactions we will take you through an example process.

The example we are using is a Baseline Personnel Security Standard (BPSS) check that may be performed on a new starter for an organization. The checks we are performing are checking an Excel spreadsheet but this could be a call to an external database or another environment. The response once the information is collected is then passed, using the Interact API, to an individual for review – human/digital worker collaboration. The approver reviews the information and makes a decision whether to offer the person the position by either sending an acceptance letter or rejection letter. This is done through the same Interact process form where a flag is changed to open a new section of the Interact process form showing that the BPSS Check results have been completed.

## Link to Blue Prism queues

### Specify a queue in a process

A key factors to ensure communications are established, are in Interact processes. The main page of the example Interact process form is shown below.

The screenshot shows the 'Details' tab of the Blue Prism Form Designer. The process name is 'BPSS Check'. The description is 'This is the new joiner process, includes security checks and then dependent on checks a "Human in the Loop" determines whether employee is accepted or rejected.' The 'Send Email' and 'Supervision' checkboxes are unchecked. The 'Category' is set to 'Production'. The 'Priority' is set to '1'. The 'SLA' is set to '0 : 10 : 0'. The 'Queue' is set to 'Interact'. The 'User groups' field contains 'Developers'. The 'Process Icon' field shows a file named 'bpsbpc.png' with a 'Choose file' button. There are 'Stock icons' and 'Cancel', 'Next', and 'Save' buttons at the bottom.

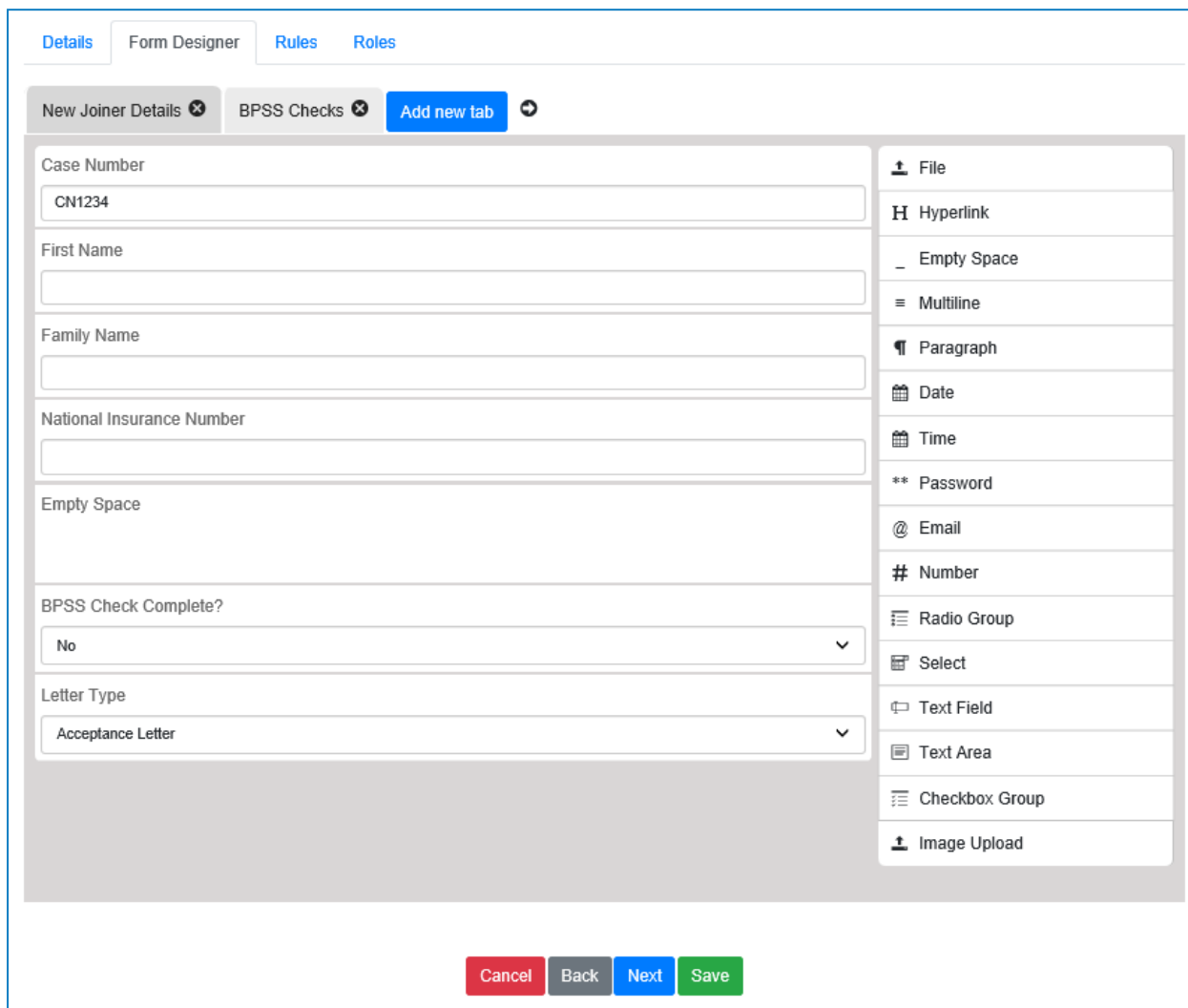
Name*	BPSS Check
Description	This is the new joiner process, includes security checks and then dependent on checks a "Human in the Loop" determines whether employee is accepted or rejected.
Send Email	<input type="checkbox"/>
Supervision	<input type="checkbox"/>
Category*	Production
Priority*	1
SLA*	0 : 10 : 0
Queue*	Interact
User groups*	Developers
Process Icon*	bpsbpc.png

The Queue field must match the Blue Prism queue that is being used. This is where the data collected from the Interact process will be loaded into.

If the queue name is not in the dropdown then you will need to [sync the queue data from Blue Prism](#).

In the Form Designer tab of an Interact process, we have created all the fields that will be added to the queue in Blue Prism. There are two tabs being used in our process:

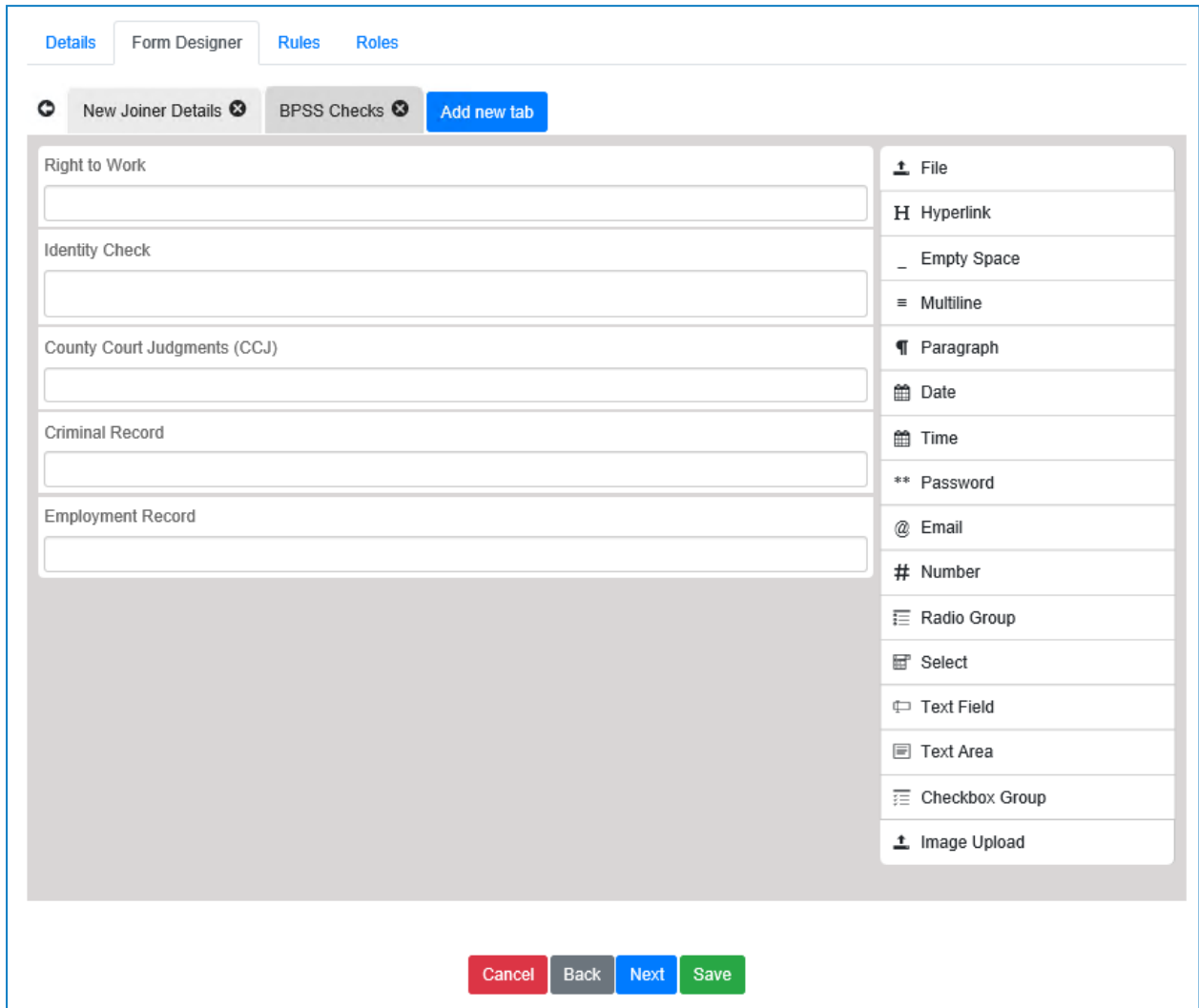
- **New Joiner Details** – On this tab we have put a Case Number field that will allow us to enter a unique reference number if we wish. We then have entered the first name, last name and national insurance number fields for the potential new starter.



The screenshot displays the Blue Prism Form Designer interface. At the top, there are tabs for 'Details', 'Form Designer', 'Rules', and 'Roles'. Below these, there are two active tabs: 'New Joiner Details' and 'BPSS Checks'. A blue button labeled 'Add new tab' is visible. The main form area contains several fields: 'Case Number' (with the value 'CN1234'), 'First Name', 'Family Name', 'National Insurance Number', 'Empty Space', 'BPSS Check Complete?' (with a dropdown menu showing 'No'), and 'Letter Type' (with a dropdown menu showing 'Acceptance Letter'). To the right of the form is a panel with various field types: File, Hyperlink, Empty Space, Multiline, Paragraph, Date, Time, Password, Email, Number, Radio Group, Select, Text Field, Text Area, Checkbox Group, and Image Upload. At the bottom of the form, there are four buttons: 'Cancel', 'Back', 'Next', and 'Save'.

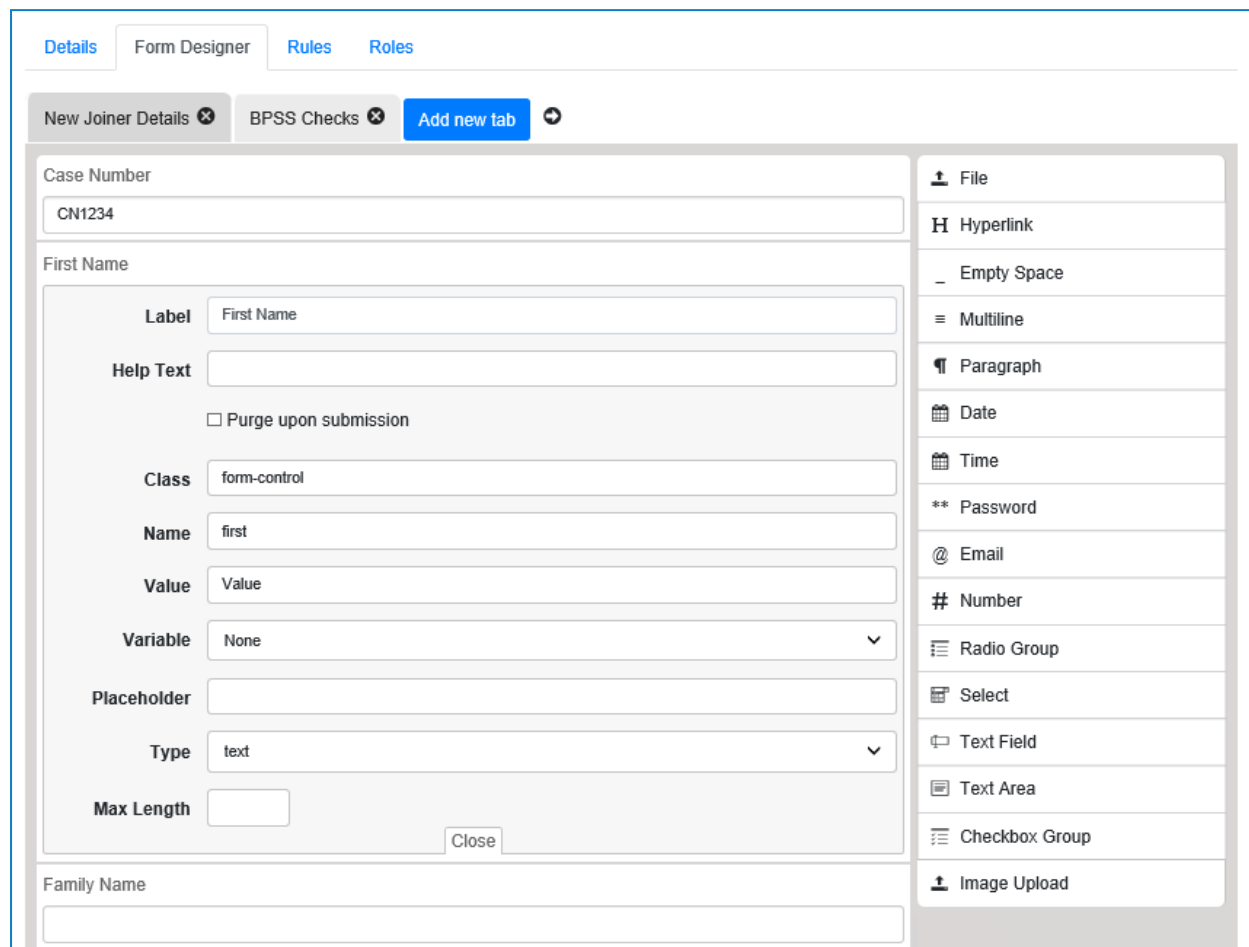


- **BPSS Checks** – This is where the results of the BPSS check will be displayed. These include items such as the result for the right to work, identity check, whether there are any outstanding CCJs, whether they have a criminal record and whether their employment record is complete.



The screenshot shows the 'Form Designer' interface with the 'BPSS Checks' tab selected. The form contains five input fields for 'Right to Work', 'Identity Check', 'County Court Judgments (CCJ)', 'Criminal Record', and 'Employment Record'. A right-hand sidebar lists various form components like File, Hyperlink, Empty Space, Multiline, Paragraph, Date, Time, Password, Email, Number, Radio Group, Select, Text Field, Text Area, Checkbox Group, and Image Upload. At the bottom, there are 'Cancel', 'Back', 'Next', and 'Save' buttons.

If we look in detail at the field elements, we can see the parameters associated with each element, the configuration provides the interaction with Blue Prism. The image below shows the First Name text element from the first tab. The key field is the Name field.



The screenshot shows the 'Form Designer' tab in the Blue Prism interface. At the top, there are tabs for 'Details', 'Form Designer', 'Rules', and 'Roles'. Below these, there are tabs for 'New Joiner Details', 'BPSS Checks', and an 'Add new tab' button. The main area displays the configuration for the 'First Name' text element. The 'Case Number' field is set to 'CN1234'. The 'First Name' field is highlighted. The configuration for the 'First Name' field includes: 'Label' (First Name), 'Help Text' (empty), 'Purge upon submission' (unchecked), 'Class' (form-control), 'Name' (first), 'Value' (Value), 'Variable' (None), 'Placeholder' (empty), 'Type' (text), and 'Max Length' (empty). A 'Close' button is at the bottom right of the configuration panel. On the right side, there is a list of available field types: File, Hyperlink, Empty Space, Multiline, Paragraph, Date, Time, Password, Email, Number, Radio Group, Select, Text Field, Text Area, Checkbox Group, and Image Upload.

This is set to 'first' and is the name of the data item entry that will be used in Blue Prism. There are specific requirements for the names that are used to link between Interact and Blue Prism.

Element	Element Type	Name
Case Number	Text	caseno
First Name	Text	first
Last Name	Text	last
National Insurance Number	Text	nin
BPSS Check Complete?	Radio Group	bpss
Letter Type	Select	letter
Right to Work	Text	rtw
Identity Check	Text	Identity
County Court Judgements	Text	ccj
Criminal Record	Text	criminal
Employment Record	Text	employment

Field validation:

- The Name field will default to lowercase letters. In fact, if you put any uppercase letters in and go to another field or close the field designer, it will automatically change everything to lowercase.
- Spaces and special characters are also not supported. If you want to use a space to make the field clearer use the hyphen (-). The table below lists the 'names' that have been assigned to the elements on the two tabs of the process form.

The two other parts that make up the Interact process are the Rules and Roles.

Roles is where we define whether the element fields are mandatory, optional, read-only or hidden. In the example below four fields on the first tab are mandatory:

- Case Number
- First Name
- Family Name
- National Insurance Number

These must be completed to enable the process form to be submitted.

The BPSS Check Complete? element is optional so the process form can be submitted without the field being completed. The Letter Type is set to Hide and the remaining elements are all set to read-only as they are element fields that will be updated by Blue Prism and we do not want a user to enter data here.

Details
Form Designer
Rules
Roles

New Joiner Details

Field name	Role
First Name	Mandatory
Family Name	Mandatory
National Insurance Number	Mandatory
Letter Type	Hide
Case Number	Mandatory
BPSS Check Complete?	Optional

BPSS Checks

Field name	Role
Right to Work	Read only
Identity Check	Read only
County Court Judgments (CCJ)	Read only
Criminal Record	Read only
Employment Record	Read only

Cancel
Back
Save

The hidden Letter Type field is controlled by a the rule below.

Details
Form Designer
Rules
Roles

New Joiner Details

IF
THEN

BPSS Check Co...
is
Yes
Letter Type
is visible

+

-

BPSS Checks

IF
THEN

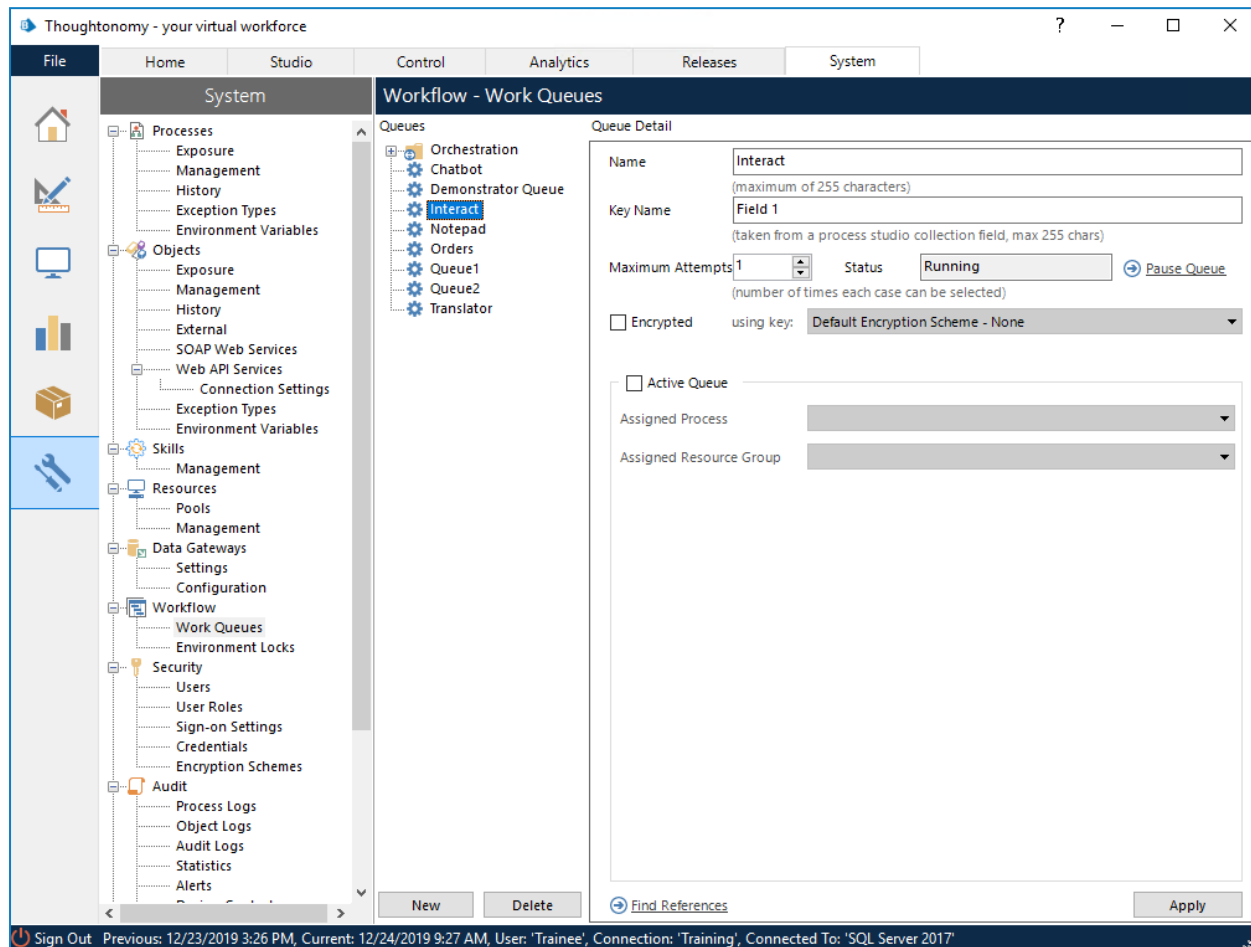
+

Cancel
Back
Next
Save

If the BPSS Check Complete? flag is set to Yes then the Letter Type field becomes visible, else when set to default value No, the field is invisible.

## Sync queue data

If you create a new queue in Blue Prism for use with interact, Interact must be synchronized before it the queue can be selected for use. In our example we are using an existing queue called Interact, as shown in the System > Workflow - Work Queues settings in Blue Prism.



The screenshot shows the Blue Prism application window titled "Thoughtonomy - your virtual workforce". The interface is divided into several panes. On the left is a navigation tree with categories like Processes, Objects, Skills, Resources, Data Gateways, Workflow, Security, and Audit. The "Workflow" category is expanded, showing "Work Queues". The main pane is titled "Workflow - Work Queues" and displays a list of queues: "Orchestration", "Chatbot", "Demonstrator Queue", "Interact" (highlighted), "Notepad", "Orders", "Queue1", "Queue2", and "Translator". To the right of this list is a "Queue Detail" pane for the selected "Interact" queue. This pane contains the following fields and controls:

- Name:** Interact (with a note: "(maximum of 255 characters)")
- Key Name:** Field 1 (with a note: "(taken from a process studio collection field, max 255 chars)")
- Maximum Attempts:** 1 (with a note: "(number of times each case can be selected)")
- Status:** Running (with a "Pause Queue" button)
- Encrypted:** ☐ Encrypted using key: Default Encryption Scheme - None
- Active Queue:** ☐ Active Queue
- Assigned Process:** (dropdown menu)
- Assigned Resource Group:** (dropdown menu)

At the bottom of the Queue Detail pane are buttons for "New", "Delete", "Find References", and "Apply". The status bar at the very bottom shows: "Sign Out Previous: 12/23/2019 3:26 PM, Current: 12/24/2019 9:27 AM, User: 'Trainee', Connection: 'Training', Connected To: 'SQL Server 2017'".

To synchronize the Blue Prism queues follow these steps as an administrator:

1. In Interact, select **Settings > Endpoint Settings** from the main menu.
2. Click **Sync** to refresh the Blue Prism data in Interact and ensure the new queue is available in Interact. In the image below the queues have been synchronized and the Interact queue is available for use.

## Endpoints settings

Sync

### Endpoint list

- Chatbot
- Decipher Queue
- Demonstrator Queue
- Interact
- New Customers
- New Orders
- New Products
- Notepad
- Orders
- Queue1
- Queue2
- Translator

### IADA Service configuration

URL\*

Username\*

Password\*

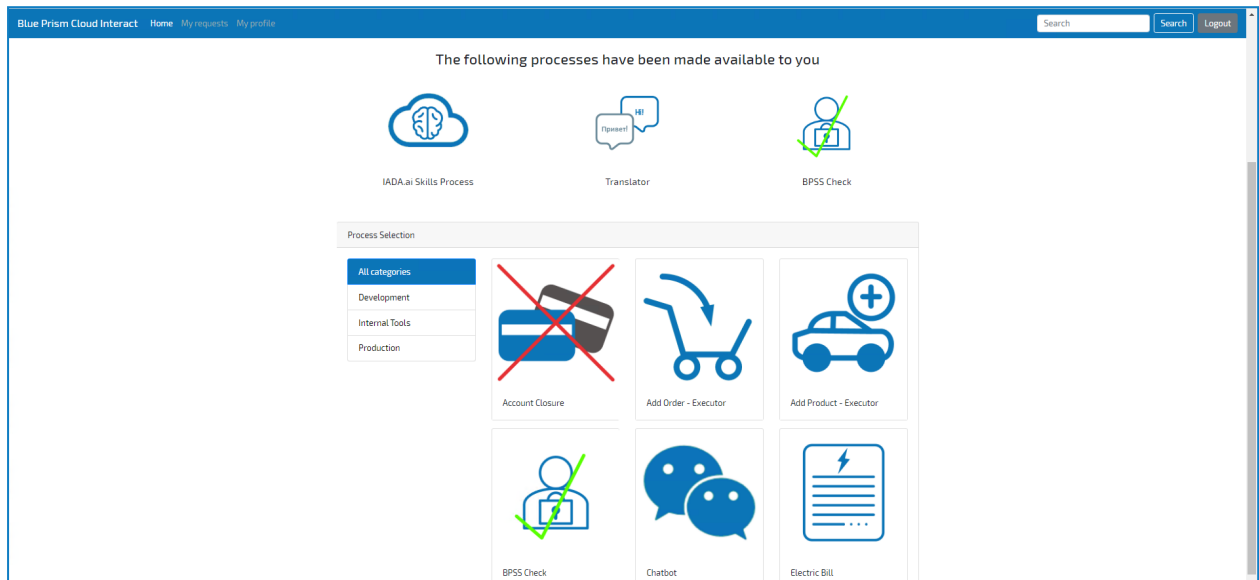
Ok

Cancel

## Submit a request to a Blue Prism queue

### 1. Log in to Interact.

The processes that have been assigned to you are displayed as determined by the assigned [user groups](#) and [categories](#). In this example process, the user was allocated to a user group of Developers and a category of Production. If required, you can select a specific category to filter the process forms displayed.





- Complete the process form. The second tab does not yet have any data as the automation has not yet been run.

Cancel

BPSS Check

Save as draft

Submit

New Joiner Details

BPSS Checks

Case Number

CN1234

First Name

Karen

Family Name

Fox

National Insurance Number

ZNVBG4PS5T

BPSS Check Complete?

No

Next

Cancel

BPSS Check

Save as draft

Submit

New Joiner Details

BPSS Checks

Right to Work

Identity Check

County Court Judgments (CCJ)

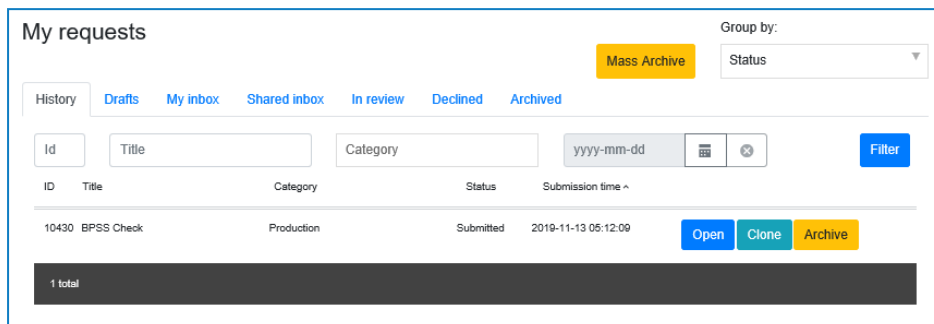
Criminal Record

Employment Record

Back

- Click **Submit**. The data is submitted to the work queue in Blue Prism and the main dashboard displays.

The request displays in the My Requests tab.



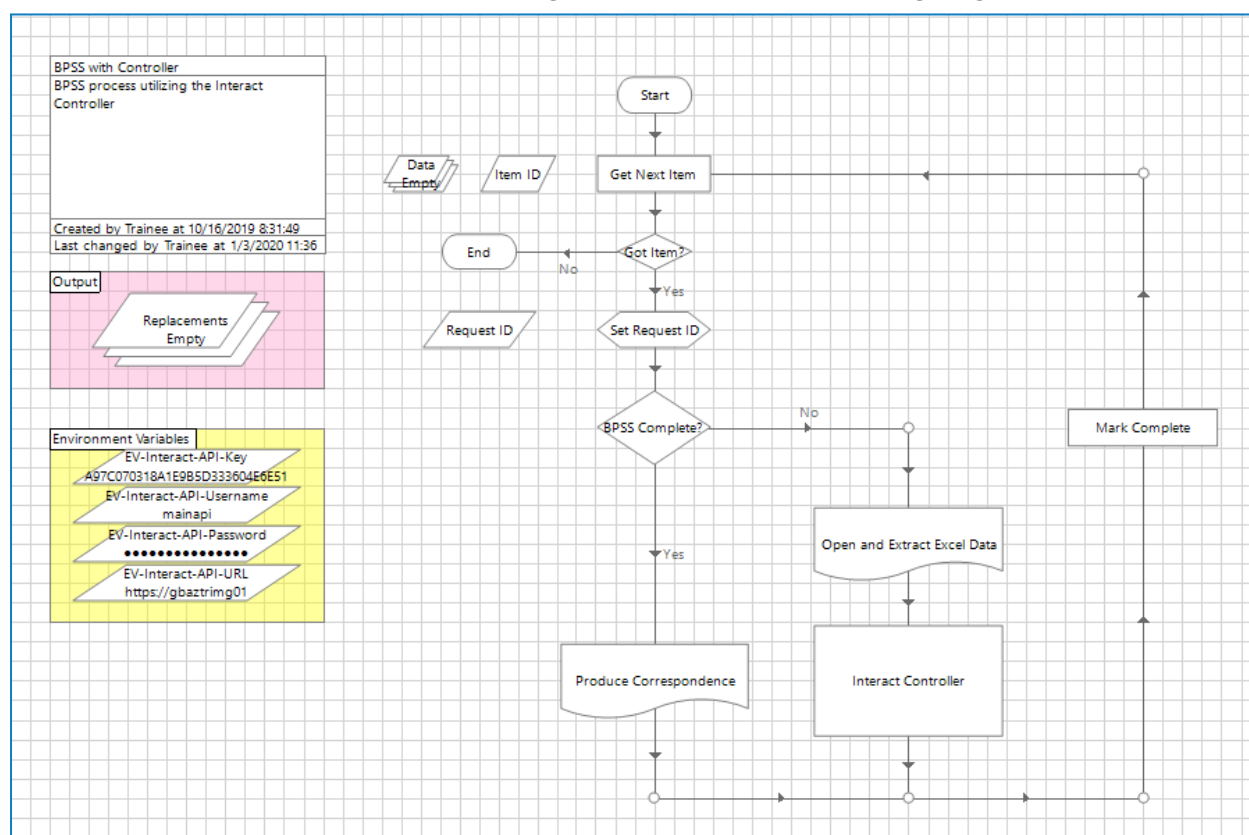
Double click a request to see the detailed view of a request.

## Using Interact Data

Once added to the Blue Prism queue, information from Interact is accessed by the Get Next Item action using the Work Queues VBO.

It is recommended that no fields are added to the collection. This allows a level of flexibility and supports the use of additional inbuilt field names like the `_requestId` field which tracks the ID of the submission.

The example automation we will be running is illustrated in the following diagram.



In the drop-downs below, each tool in the example automation is examined.

## Get Next Item

Retrieves the information from the Interact queue and outputs the information into the Data collection. The properties of the action are illustrated in the next two images.

### Inputs

**Action Properties**

Name: Get Next Item

Description: This action gets the next item to be worked from the queue, returning its details and locking it so no other case can work it.

Business Object: Work Queues

Action: Get Next Item

Inputs | Outputs | Conditions

Name	Data Type	Value
Queue Name	Text	"Interact"
Key Filter	Text	
Tag Filter	Text	

Group:

☐ Page ☒ Data Type

☒ View All Items

- Binaries
- Collections
- Dates
- DateTimes
- Flags
- Images
- Numbers
- Passwords
- Text
- Times
- TimeSpans

Stage logging: Errors only ☐ Don't log parameters on this stage

Warning threshold: System Default Number of minutes: 5 (0 to disable)

OK Cancel

Action Properties

Name:

Get Next Item

Description:

This action gets the next item to be worked from the queue, returning its details and locking it so no other case can work it.

Business Object

Work Queues

Action

Get Next Item

Inputs

Outputs

Conditions

Name	Data Type	Store In
Item ID	Text	Item ID
Data	Collection	Data
Status	Text	
Attempts	Number	

Stage logging:

Errors only

☐ Don't log parameters on this stage

Warning threshold:

System Default

Number of minutes

5

(0 to disable)

Group:

☐ Page☒ Data Type

☒ View All Items

Binaries

Collections

Dates

DateTimes

Flags

Images

Numbers

Passwords

Text

Times

TimeSpans

OK

Cancel

## Got Item?

This is a simple Decision stage to check if there was an item in the queue for processing. A check is made whether there 'Item ID' Data Item is populated. If there is an 'Item ID' then the automation will continue if not, the process will end.

Decision Properties

Name:

Description:

Expression

`[Item ID] <> ""`

Validate

Evaluate Expression

Data Items

Group:

☐ Page
☒ Data Type

☒ View All Items

Binaries

+

 Collections

+

 Dates

+

 DateTimes

+

 Flags

+

 Images

+

 Numbers

+

 Passwords

+

 Text

+

 Times

+

 TimeSpans

Functions

+

 Conversion

+

 Data

+

 Date

+

 Environment

+

 Exceptions

+

 File

+

 Logic

+

 Number

+

 Text

Function Detail

Expression Function Builder

Use this area to compose a function statement and paste it into the expression.

Select a function from the list on the left. The function details and the required parameters will be shown here.

Complete the details either by entering values or by dragging in data items from the list on the right.

Stage logging: 

Errors only

Warning threshold: 

System Default

Number of minutes 

5

 (0 to disable)

OK

Cancel

## Set Request ID

Is a Calculation stage to store the '\_requestId' extracted from Interact into a Data Item. This is needed for the Interact Controller to gather the JSON from Interact to allow values to be manipulated. The request ID is a the unique number that is assigned to the submission when the 'Submit' command is selected.

The screenshot shows the 'Calculation Properties' dialog box for the 'Set Request ID' stage. The 'Name' field is set to 'Set Request ID'. The 'Description' field is empty. The 'Expression' field contains '[Data.\_requestId]'. The 'Data Items' section shows 'Group' with 'Page' unchecked and 'Data Type' checked. The 'View All Items' checkbox is also checked. The 'Functions' list on the left includes Conversion, Data, Date, Environment, Exceptions, File, Logic, Number, and Text. The 'Function Detail' section shows the 'Expression Function Builder' with instructions on how to use it. The 'Stage logging' dropdown is set to 'Errors only'. The 'Warning threshold' dropdown is set to 'System Default'. The 'Number of minutes' field is set to 5, with a note '(0 to disable)'. The 'OK' and 'Cancel' buttons are at the bottom right.

**Calculation Properties**

Name:

Description:

**Expression**

[Data.\_requestId]

**Data Items**

Group:

☐ Page ☒ Data Type

☒ View All Items

**Binaries**

**Collections**

**Dates**

**DateTimes**

**Flags**

**Images**

**Numbers**

**Passwords**

**Text**

**Times**

**TimeSpans**

**Functions**

- Conversion
- Data
- Date
- Environment
- Exceptions
- File
- Logic
- Number
- Text

**Function Detail**

**Expression Function Builder**

Use this area to compose a function statement and paste it into the expression.

Select a function from the list on the left. The function details and the required parameters will be shown here.

Complete the details either by entering values or by dragging in data items from the list on the right.

Validate Evaluate Expression Store Result In ☒ Request ID

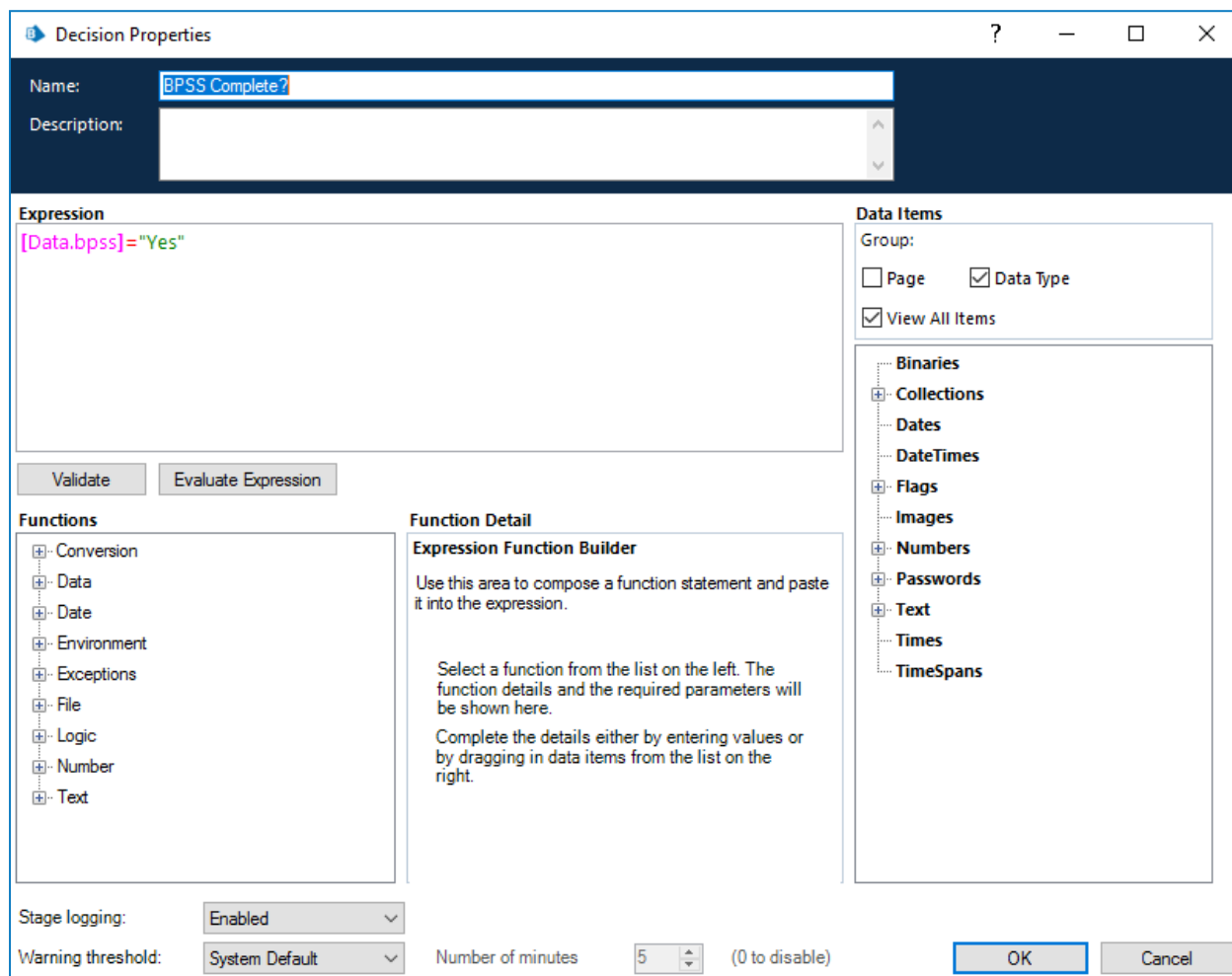
Stage logging:

Warning threshold:  Number of minutes  (0 to disable)

OK Cancel

## BPSS Complete?

This is another decision stage that checks whether the BPSS flag is set to 'Yes' or 'No'. This is set in the Interact process form and is pulled into the 'Data' collection when the information is gathered from the queue. By default, the flag is set to 'No' and when this option is chosen the automation proceeds down the gather data route where data is extracted from Microsoft Excel. If the choice is set to 'Yes' then the 'Produce Correspondence' path is selected and Microsoft Word launched.



**Decision Properties**

Name:

Description:

**Expression**

`[Data.bpss] = "Yes"`

**Functions**

- Conversion
- Data
- Date
- Environment
- Exceptions
- File
- Logic
- Number
- Text

**Function Detail**

**Expression Function Builder**

Use this area to compose a function statement and paste it into the expression.

Select a function from the list on the left. The function details and the required parameters will be shown here.

Complete the details either by entering values or by dragging in data items from the list on the right.

**Data Items**

Group:

☐ Page ☒ Data Type

☒ View All Items

- Binaries
- Collections
- Dates
- DateTimes
- Flags
- Images
- Numbers
- Passwords
- Text
- Times
- TimeSpans

Stage logging:

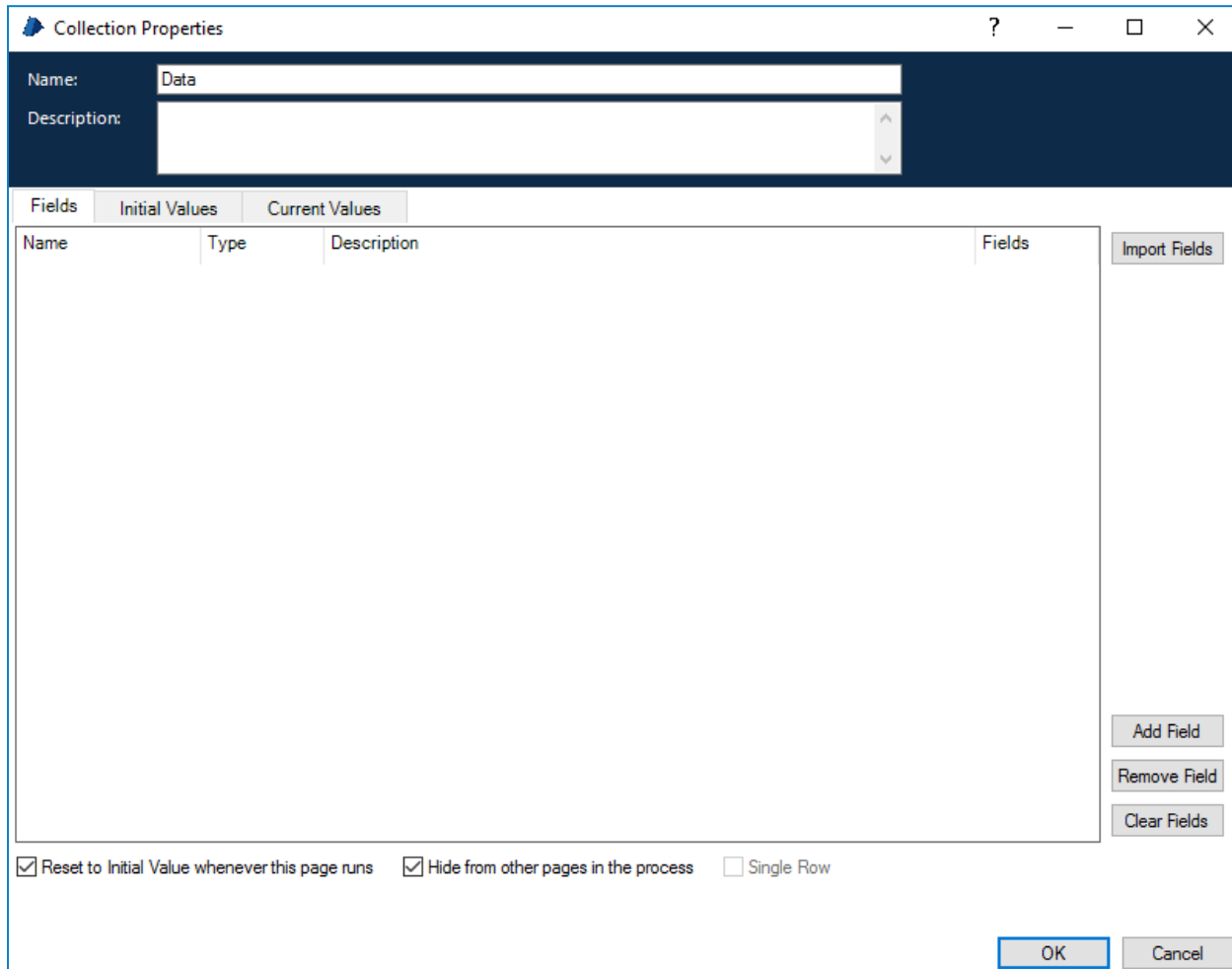
Warning threshold:  Number of minutes  (0 to disable)

## Data Items and Collections

There are a number of Data Items and Collections that are used throughout the automation. The important ones are detailed below.

### Data Collection

This is the main collection that is populated when the information is pulled from the queue. There are no specified fields set in the collection.



Collection Properties

Name: Data

Description:

Name	Type	Description	Fields

Import Fields

Add Field

Remove Field

Clear Fields

☒ Reset to Initial Value whenever this page runs ☒ Hide from other pages in the process ☐ Single Row

OK Cancel



## Replacements Collection

This is where the information is stored after being extracted from Microsoft Excel. The format of this collection is important as it is used as an input for the Interact Controller, we will cover the Interact Controller object in more detail in the next section. The Replacement Collection has no fields defined, but these are set by the 'Open and Extract Data' page. The Collection on this page has two defined fields as illustrated below. However, the automation will add rows to the collection depending on how many items are being updated in the Interact process form.

Collection Properties

Name: OutputCollection

Description:

Fields	Initial Values	Current Values
Name	Type	Description
Name	Text	
Value	Text	

Fields:

Import

Add

Remove

Clear

☒ Reset to Initial Value whenever this page runs ☒ Hide from other pages in the process ☐ Single Row

OK Cancel

Therefore, when the process is run a row is added to the collection, each with two fields one defining the name of the Interact element 'name' and the other with value that will be applied for that 'name' element.

The name that is entered into the Name field must match the name that was specified in the Interact process form, they are case sensitive so must be all lowercase and must not contain spaces.

## Open and Extract Excel Data

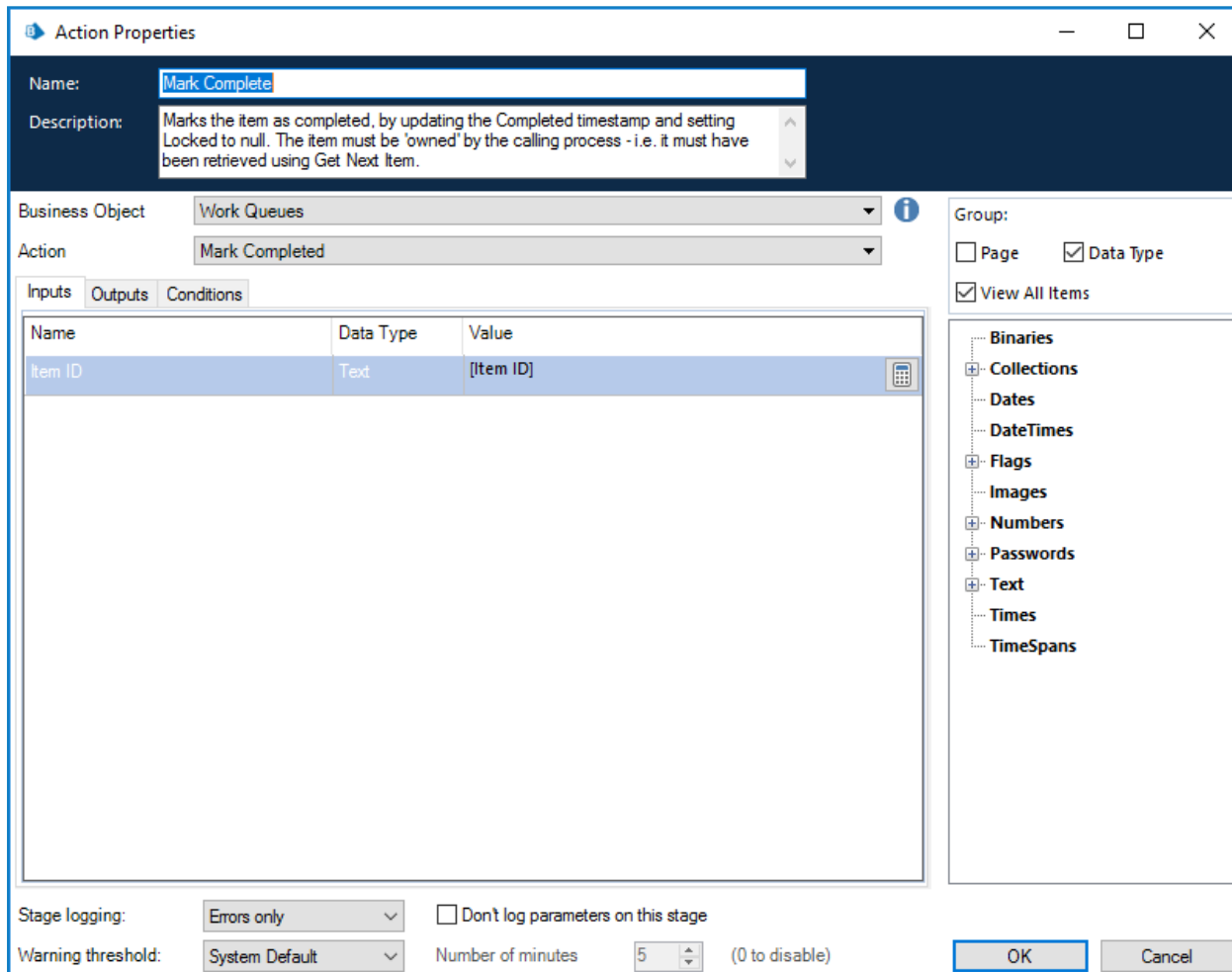
This page is used to gather data and information for updating in Interact. In our example process we are pulling data from Microsoft Excel, though this could be any other application or system.

## Produce Correspondence

This page is used to write either an acceptance or rejection letter back to the candidate once the result of the BPSS check has been completed, this page calls Microsoft Word. Again, the page contents are not important this could be calling any other application or system but exists to demonstrate the 'human/digital worker collaboration' functionality.

## Mark Complete

The Mark Complete action stage utilizes the Work Queues Business Object to mark the item in the queue as complete once the processing has been completed.



**Action Properties**

Name:

Description: Marks the item as completed, by updating the Completed timestamp and setting Locked to null. The item must be 'owned' by the calling process - i.e. it must have been retrieved using Get Next Item.

Business Object:

Action:

Inputs Outputs Conditions

Name	Data Type	Value
Item ID	Text	[Item ID]

Group:

☐ Page ☒ Data Type

☒ View All Items

- Binaries
- Collections
- Dates
- DateTimes
- Flags
- Images
- Numbers
- Passwords
- Text
- Times
- TimeSpans

Stage logging:  ☐ Don't log parameters on this stage

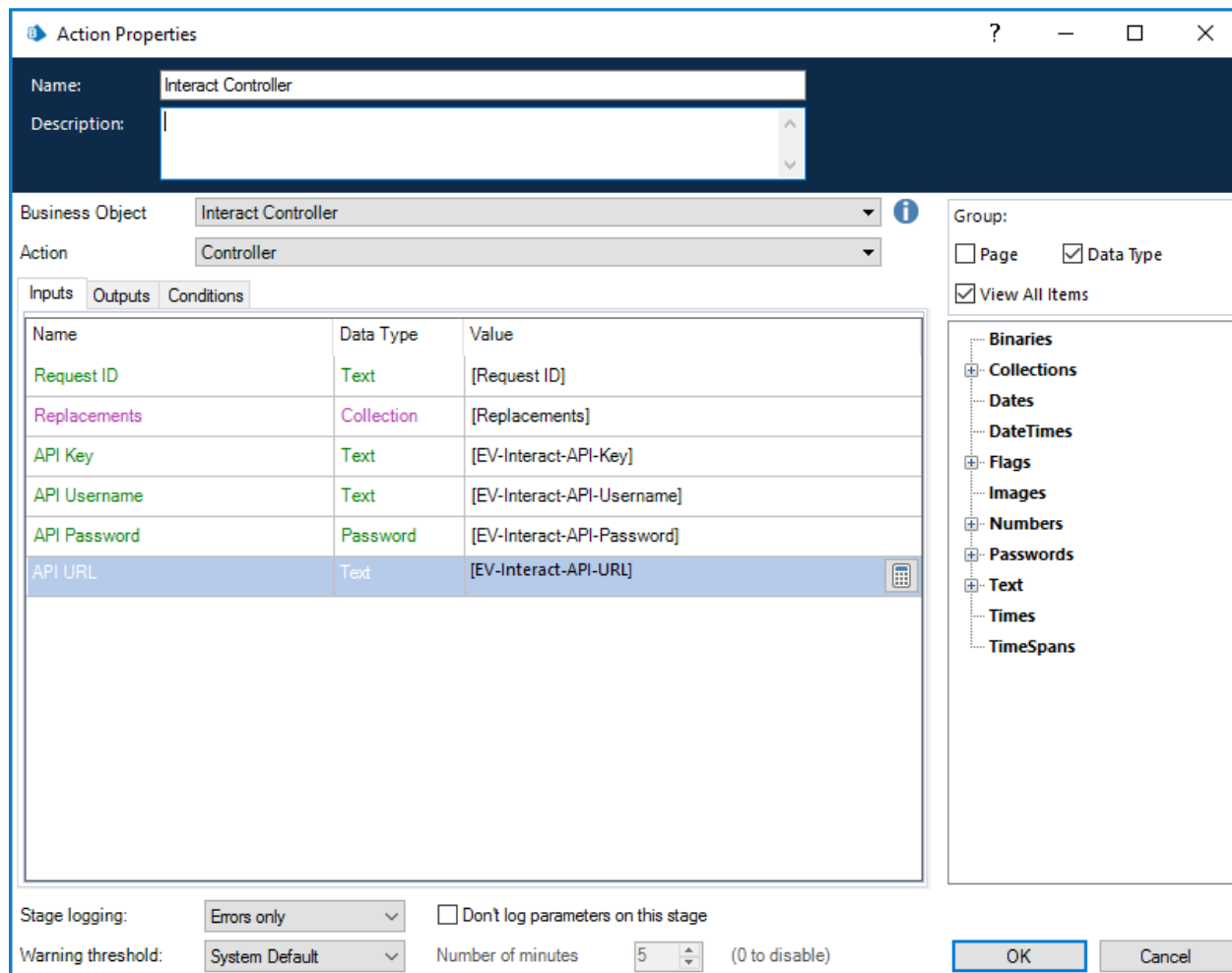
Warning threshold:  Number of minutes  (0 to disable)

## Interact controller

The Interact controller is a Business Object that has been produced by Blue Prism Cloud to simplify the interaction between Interact and Blue Prism Design Studio.

### Configuration

The Business Object utilizes Environmental Variables to control its operation, it requires a Collection as an input along with the submission ID (Request ID) to identify the Interact submission that it will be updating. There are no outputs from the Interact Controller though there is exception handling should an error occur during processing.



**Action Properties**

Name:

Description:

Business Object:

Action:

Inputs | Outputs | Conditions

Name	Data Type	Value
Request ID	Text	[Request ID]
Replacements	Collection	[Replacements]
API Key	Text	[EV-Interact-API-Key]
API Username	Text	[EV-Interact-API-Username]
API Password	Password	[EV-Interact-API-Password]
API URL	Text	[EV-Interact-API-URL]

Group: ☐ Page ☒ Data Type ☒ View All Items

Binaries  
Collections  
Dates  
DateTimes  
Flags  
Images  
Numbers  
Passwords  
Text  
Times  
TimeSpans

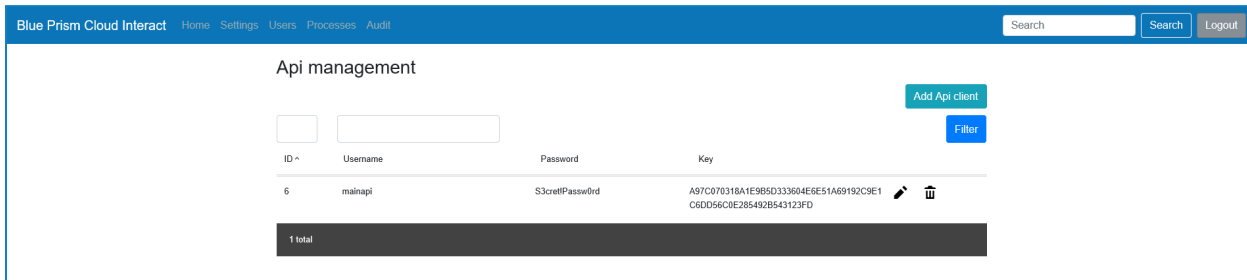
Stage logging:  ☐ Don't log parameters on this stage

Warning threshold:  Number of minutes  (0 to disable)

There are four Environmental Variables that need to be established to operate the Interact Controller:

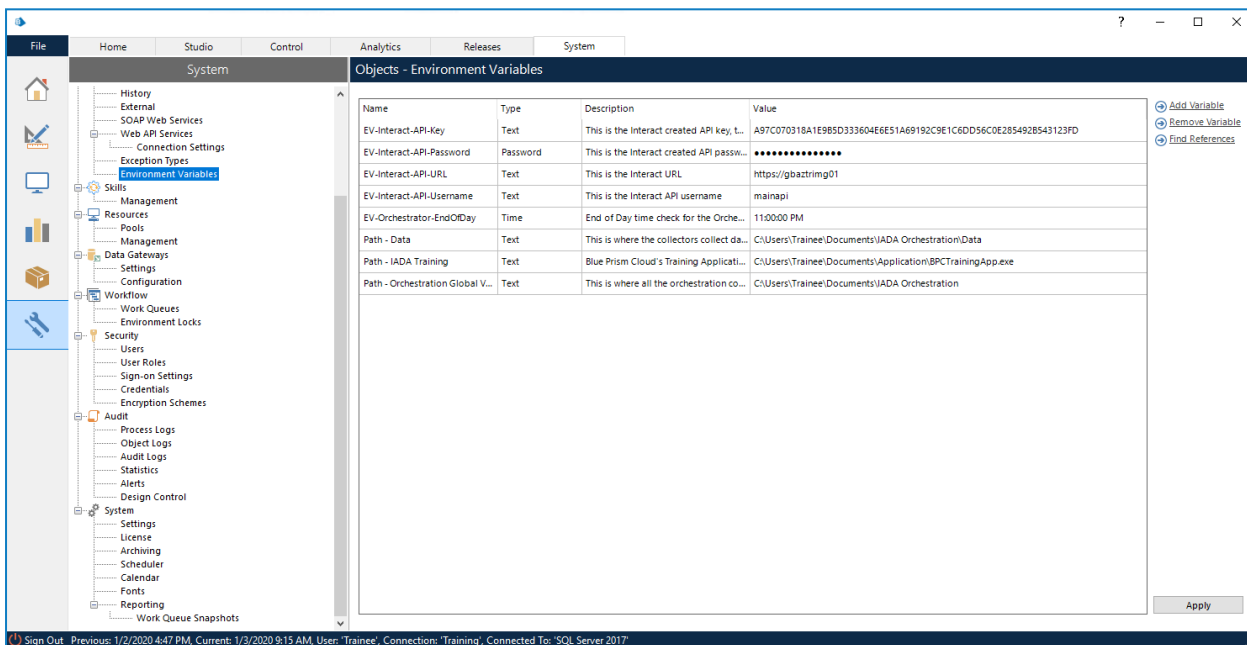
- EV-Interact-API-Key;
- EV-Interact-API-Username;
- EV-Interact-API-Password; and
- EV-Interact-API-URL.

The first three of these Environmental Variables are obtained when the API is set up within Interact. The image below shows the API that has been established for our example process.



The same API can be used by multiple processes. Though it is recommended that a separate API is used for each digital worker.

The last Environmental Variable the 'EV-Interact-API-URL' is the URL used to access the Interact Web Server. The Environmental Variables are set in the System area of Blue Prism as illustrated below.



Data Items are then set changing the exposure to the 'Environment' setting and selecting the appropriate Environment Variable from the dropdown.

**Data Properties**

Name: EV-Interact-API-Key

Description: EV-Interact-API-Key  
EV-Interact-API-Password  
EV-Interact-API-URL  
EV-Interact-API-Username  
EV-Orchestrator-EndOfDay  
Path - Data  
Path - IADA Training  
Path - Orchestration Global Variables Directory

Data Type

Initial Value: A97C070318A1E9B5D333604E6E51A69192C9E1C6DD56C0E285492B543123FD

Exposure: Environment - Read the corresponding Environment Variable from System Manager

Current Value

Visibility: ☒ Hide from other pages in the process

Initialisation: ☒ Reset to Initial Value whenever this page runs

**Text**  
Text items are used to store alphanumeric data.  
This information may be names, addresses, telephone numbers, etc.

OK Cancel

## Operation

The Interact Controller has three distinct sections detailed below but in summary are:

- Get Bearer Token Header;
- Get Process Submission by Request ID; and
- Update Process Submission by Request ID.

### Bearer Token

The API connection is used to get bearer authentication from Interact. Bearer authentication is an HTTP authentication scheme that involves security tokens called bearer tokens. The name “bearer authentication” can be understood as “give access to the bearer of this token.” The Bearer Token is a cryptic string, usually generated by the server in response to a login request. This Bearer Token is then used as authorization to retrieve and update information in Interact.

**Note:** The Bearer Token has a limited time span, which is 15 minutes. If the retrieval and update doesn't complete within this period, a new Bearer Token will be required.

### Get Process Submission by Request ID

This section of the business object uses the Bearer Token as authentication and the Request ID to retrieve from Interact the submission data and form structure. This is returned in a raw JSON format.

### Update Process Submission by Request ID

The final part of the business object takes the raw JSON that has been retrieved, reformats it into an acceptable JSON, updates any values that have been changed using the 'Replacements' Collection that was created when the data was extracted from Excel and then posts the updated information back into Interact.

## Running the Process

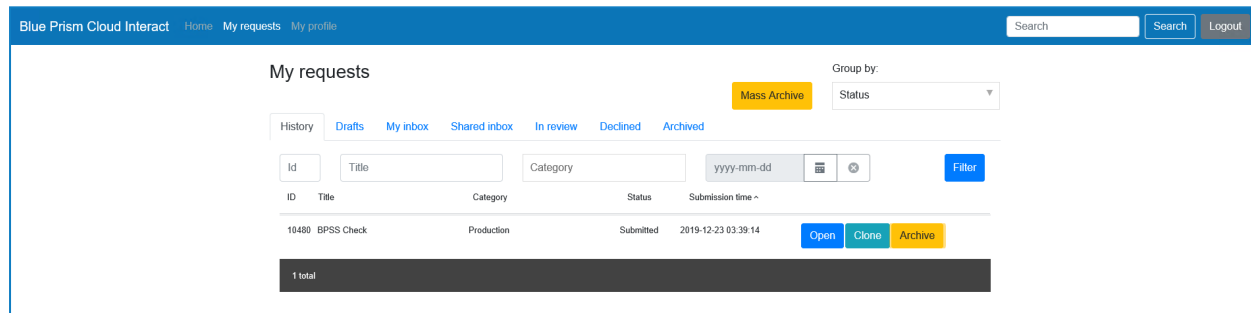
Go to the following URL to see a video (Part 1) illustrating the process in operation:

- <https://video.blueprism.com/watch/KvXXvMELbdVtVLh9SWxwce>

The video captures the information being typed into the Interact process form and being submitted. Then the process is stepped through, showing the data being extracted from Microsoft Excel. Finally, we revisit Interact and show the updated data in Interact.

## Human/digital worker collaboration

The example process we are using contains ‘human/digital worker collaboration’ capability. Once the initial submission has been made and the data retrieved from Microsoft Excel and returned back to the user in Interact. The user can then action the second part of the process which is to decide whether to employ or reject the potential candidate and send them an appropriate letter. This is done from within Interact. The user can review the information returned from Blue Prism within the My Requests section of Interact, see below.



Blue Prism Cloud Interact Home My requests My profile Search Search Logout

My requests

Group by: Status

Mass Archive

History Drafts My inbox Shared inbox In review Declined Archived

Id Title Category yyyy-mm-dd Filter

ID	Title	Category	Status	Submission time ~
10480	BPSS Check	Production	Submitted	2019-12-23 03:39:14

Open Clone Archive

1 total

By clicking on the Open option, the user can see the original information submitted, first image, and then the retrieved information, second image.

Blue Prism Cloud Interact
Home
My requests
My profile
Search
Search
Logout

Cancel
BPSS Check
Save as draft
Submit
Clone

New Joiner Details
BPSS Checks

Case Number  
CN1234

First Name  
Karen

Family Name  
Fox

National Insurance Number  
ZNVBG4PSST

BPSS Check Complete?  
No

Next

Blue Prism Cloud Interact
Home
My requests
My profile
Search
Search
Logout

Cancel
BPSS Check
Save as draft
Submit
Clone

New Joiner Details
BPSS Checks

Right to Work  
No

Identity Check  
Valid

County Court Judgments (CCJ)  
Yes

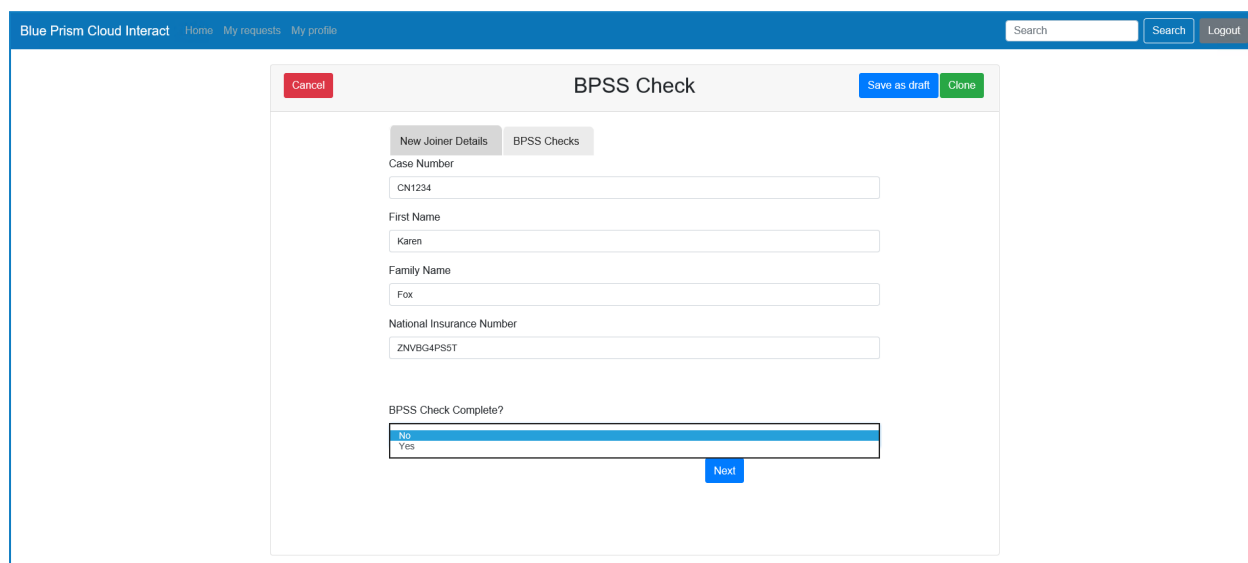
Criminal Record  
Bad Person

Employment Record  
No history

Back



We can see that the candidate who the BPSS check was performed may be an inappropriate candidate and so you may decide to send them a rejection rather than an acceptance letter. We can do this by selecting the Clone option at the top of the window. This duplicates the previous submission but keeps the data that has been returned from Blue Prism. Once cloned the user can change the flag to show that the BPSS flag has been completed.



Blue Prism Cloud Interact Home My requests My profile Search Search Logout

Cancel BPSS Check Save as draft Clone

New Joiner Details BPSS Checks

Case Number  
CN1234

First Name  
Karen

Family Name  
Fox

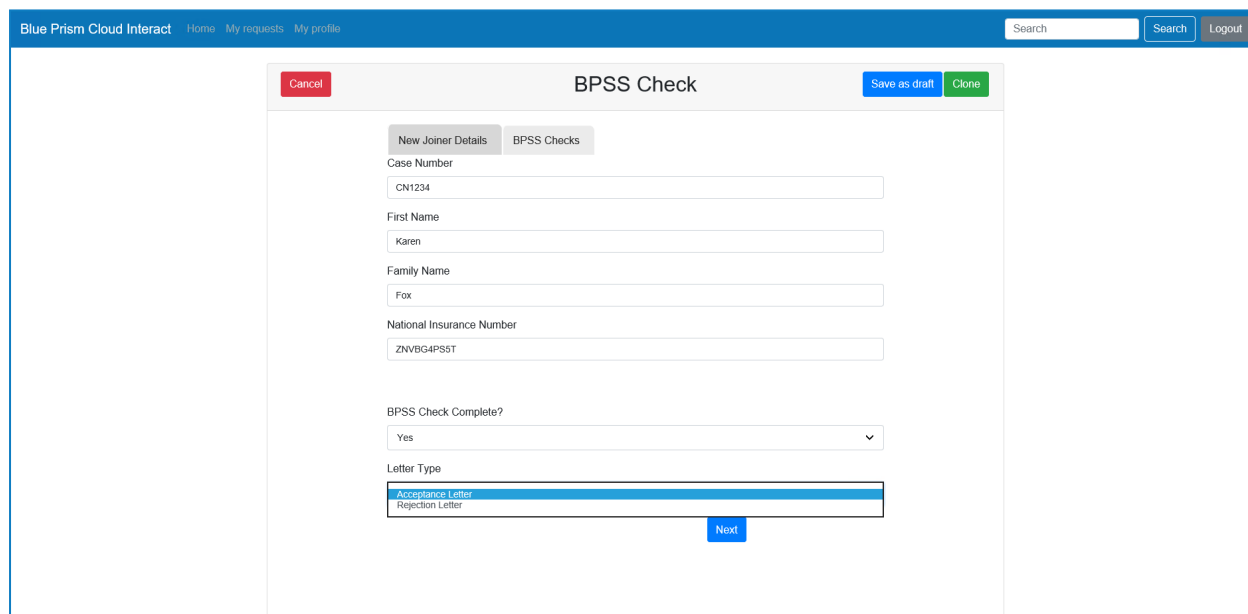
National Insurance Number  
ZNVBG4PSST

BPSS Check Complete?

No  
Yes

Next

By selecting the 'Yes' option the hidden field that we established using the Rules we set up when the form was created becomes available. We can then choose to select the appropriate letter as illustrated below.



Blue Prism Cloud Interact Home My requests My profile Search Search Logout

Cancel BPSS Check Save as draft Clone

New Joiner Details BPSS Checks

Case Number  
CN1234

First Name  
Karen

Family Name  
Fox

National Insurance Number  
ZNVBG4PSST

BPSS Check Complete?

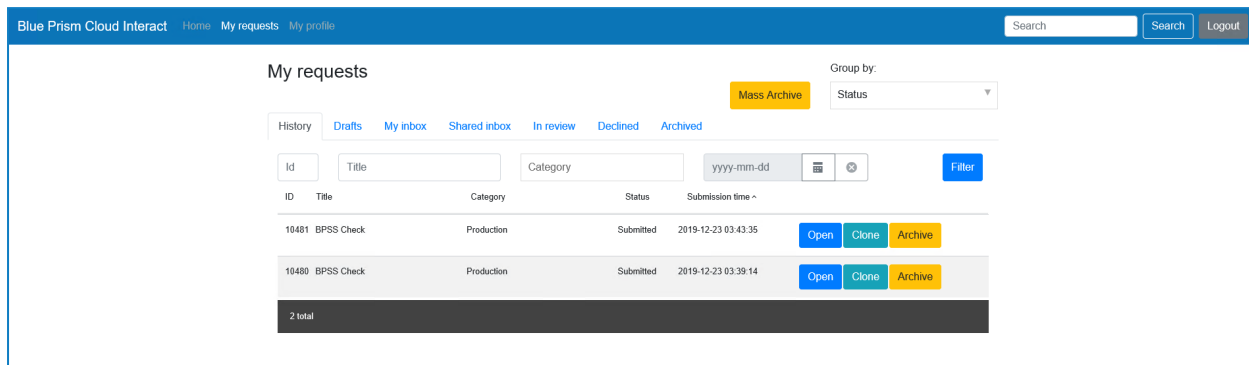
Yes

Letter Type

Acceptance Letter  
Rejection Letter

Next

By choosing the appropriate letter and then by pressing the Clone option again will create a new submission, see below.



Blue Prism Cloud Interact Home My requests My profile Search Search Logout

My requests

Mass Archive

Group by: Status

History Drafts My inbox Shared inbox In review Declined Archived

Id Title Category yyyy-mm-dd Filter

ID	Title	Category	Status	Submission time ^	
10481	BPSS Check	Production	Submitted	2019-12-23 03:43:35	Open Clone Archive
10480	BPSS Check	Production	Submitted	2019-12-23 03:39:14	Open Clone Archive

2 total

By opening the submission we can see the update information being submitted. This information will once again be added into the Blue Prism 'Interact' queue. Running the automation again, the 'BPSS Complete?' decision stage diverts the process to produce the correspondence rather than performing the data extraction.

The second video (Part 2) illustrates this part of the process and shows the letter produced as a result of selecting the 'Rejection Letter' option as the 'Letter Type'. Go to

<https://video.blueprism.com/watch/pH4AbwdYrw9njgbG6ZK1JQ> to watch these steps in action.

## Interact elements

When creating your process form there are multiple element types that can be utilized. The following section details the process form elements available.

Many of the process form elements have a Purge upon Submission check box option within the parameters that applied to the element. If selected this means that when a user submits information through an Interact process form the data associated with the element will be deleted and not stored. If left unticked the information submitted will be readable through audit logs and through the users submitted requests. The Purge upon Submission check box works on an element by element basis and so will only purge data for the fields where that check box is ticked.

### File element

The File element is used in the uploading of a file. Help Text can be added to guide the user through the use of the element. The file is added to a work queue for processing. If the file was of the wrong format the user can retrieve the submitted file by using the Download File” button.

The screenshot shows the 'File' element configuration window in the Interact tool. The window has a title bar with 'General' and 'Add new tab' buttons. The main area contains the following fields:

- Label:** File
- Help Text:** (Empty text box)
- Purge upon submission:** ☐
- Class:** form-control
- Name:** file-1544092009373

A 'Close' button is located at the bottom right of the configuration area. On the right side of the window, there is a vertical list of other element types that can be added to the form:

- File
- Hyperlink
- Empty Space
- Multiline
- Paragraph
- Date
- Time
- Password
- Email
- Number
- Radio Group
- Select
- Text Field
- Text Area
- Checkbox Group
- Image Upload

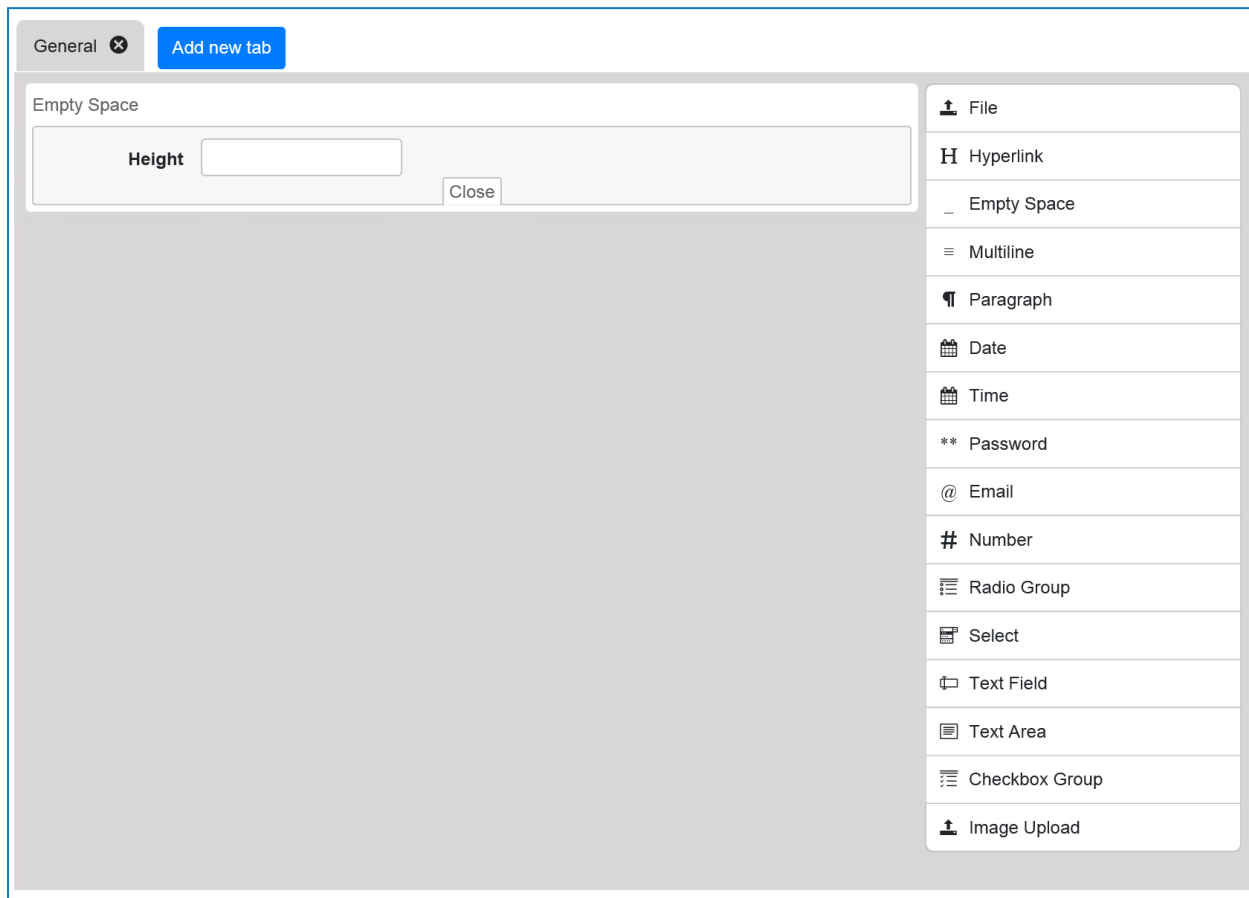
## Hyperlink element

Allows a link to be added to the form. This will allow the user to click on the link and a new tab will open in their browser to that web site. Link Text can be provided to identify the web site that is linked.

The screenshot shows the 'Hyperlink' configuration window. At the top, there is a 'General' tab and an 'Add new tab' button. The main area is titled 'Hyperlink' and contains two input fields: 'Href' with the value 'http://website.com' and 'Link Text' which is empty. A 'Close' button is located at the bottom right of the main area. On the right side, there is a vertical list of element types: File, Hyperlink, Empty Space, Multiline, Paragraph, Date, Time, Password, Email, Number, Radio Group, Select, Text Field, Text Area, Checkbox Group, and Image Upload. The 'Hyperlink' element is currently selected.

## Empty Space element

The empty space element allows the Automation Developer to create a more attractive form. It does nothing for automations but does create a gap between elements in the form. The Automation Developer can specify how high the empty space will be in pixels.



## Multiline element

This element is used in the creation of tables in forms. The Automation Developer can create the number of columns required with the specific column headings defined. The user can then add the information and Add Rows as required.

The screenshot shows the configuration interface for the Multiline element. At the top, there is a 'General' tab and an 'Add new tab' button. The main configuration area is titled 'Multiline' and contains the following fields:

- Label:** A text field containing 'Multiline'.
- Help Text:** An empty text field.
- Purge upon submission:** A checkbox that is currently unchecked.
- Class:** A text field containing 'space separated classes'.
- Name:** A text field containing 'multiline-1544092511829'.
- Columns:** A section with two text fields: 'Column name 1' and 'columnDefinition1'. To the right of these fields is an 'Add Column +' button.
- Close:** A button located at the bottom right of the configuration area.

On the right side of the interface, there is a vertical list of other interact elements, each with an icon and a label:

- File
- Hyperlink
- Empty Space
- Multiline
- Paragraph
- Date
- Time
- Password
- Email
- Number
- Radio Group
- Select
- Text Field
- Text Area
- Checkbox Group
- Image Upload

## Paragraph element

The paragraph element allows you to detail information on the form that is presented to the user. The element supports the use of Bold, Italic and Underlined text. The text is not used in any automations.

The screenshot shows the configuration window for the 'Paragraph' element in Blue Prism Interact. The window has a 'General' tab and an 'Add new tab' button. The main area is divided into two sections: 'Content' and 'Class'. The 'Content' section has a text area with the word 'Paragraph' and formatting buttons for Bold (B), Italic (I), and Underline (U). The 'Class' section has a text field with the placeholder 'space separated classes' and a 'Close' button. On the right side, there is a vertical list of other interact elements: File, Hyperlink, Empty Space, Multiline, Paragraph (selected), Date, Time, Password, Email, Number, Radio Group, Select, Text Field, Text Area, Checkbox Group, and Image Upload.

## Date element

The date element puts a calendar function onto the form. The user can use the calendar to select a particular date. The calendar starts focused on the current date and the user can step back month by month.

The screenshot shows the configuration window for a 'Date' element in the Blue Prism Interact tool. The window has a 'General' tab and an 'Add new tab' button. The main configuration area is titled 'Date' and contains the following fields:

- Label:** Date
- Help Text:** (empty)
- ☐ Purge upon submission
- Class:** form-control
- Name:** date-1544092672044
- Value:** Value
- Placeholder:** (empty)

A 'Close' button is located at the bottom right of the configuration area. On the right side of the window, there is a vertical list of other interact elements that can be added to the form:

- File
- Hyperlink
- Empty Space
- Multiline
- Paragraph
- Date
- Time
- Password
- Email
- Number
- Radio Group
- Select
- Text Field
- Text Area
- Checkbox Group
- Image Upload



## Time element

The time element produces a scroll element on the user form. Structured in ten minute intervals it starts at 00:00:00 and goes to 23:50:00.

The screenshot shows the configuration window for the 'Time' element in the Blue Prism Interact interface. The window has a tabbed interface with 'General' selected and an 'Add new tab' button. The main configuration area is titled 'Time' and contains the following fields:

- Label:** Time
- Help Text:** (empty)
- ☐ Purge upon submission
- Class:** space separated classes
- Name:** time-1544092746966
- Value:** Value

A 'Close' button is located at the bottom right of the configuration area. To the right of the configuration area is a vertical list of available interact elements, each with an icon and a label:

- File
- Hyperlink
- Empty Space
- Multiline
- Paragraph
- Date
- Time
- Password
- Email
- Number
- Radio Group
- Select
- Text Field
- Text Area
- Checkbox Group
- Image Upload

## Password element

The password element allows the user to submit a password in encrypted format.

The screenshot shows the 'Password' element configuration window in the Blue Prism Interact tool. The window has a 'General' tab and an 'Add new tab' button. The main configuration area is titled 'Password' and contains the following fields and options:

- Label:** A text field containing 'Password'.
- Help Text:** An empty text field.
- Purge upon submission:** An unchecked checkbox.
- Class:** A text field containing 'form-control'.
- Name:** A text field containing 'password-1544092819105'.
- Value:** A text field containing 'Value'.
- Close:** A button located at the bottom right of the configuration area.

On the right side of the window, there is a vertical list of available interact elements, each with an icon and a label:

- File
- Hyperlink
- Empty Space
- Multiline
- Paragraph
- Date
- Time
- Password** (highlighted)
- Email
- Number
- Radio Group
- Select
- Text Field
- Text Area
- Checkbox Group
- Image Upload

## Email element

This element allows the user to submit a valid email address, the form cannot be submitted if the address is not of the correct format.

The screenshot shows the 'Email' element configuration window in the Blue Prism Interact tool. The window has a 'General' tab and an 'Add new tab' button. The main configuration area contains the following fields and options:

- Label:** Email
- Help Text:** (Empty text box)
- ☐ Purge upon submission
- Class:** form-control
- Name:** email-1544092901066
- Value:** Value
- Close:** (Close button)

On the right side, there is a list of available interact elements:

- File
- Hyperlink
- Empty Space
- Multiline
- Paragraph
- Date
- Time
- Password
- @ Email
- # Number
- Radio Group
- Select
- Text Field
- Text Area
- Checkbox Group
- Image Upload

## Number element

The number element allows you to add a number to a form that can be submitted by a user. The field can be restricted with a minimum and/or maximum value setting a range. Additionally, an interval (step) can be provided so that the numbers can be increased in set values.

The screenshot shows the 'Number' element configuration window in the Blue Prism Interact tool. The window has a 'General' tab and an 'Add new tab' button. The main configuration area contains the following fields and options:

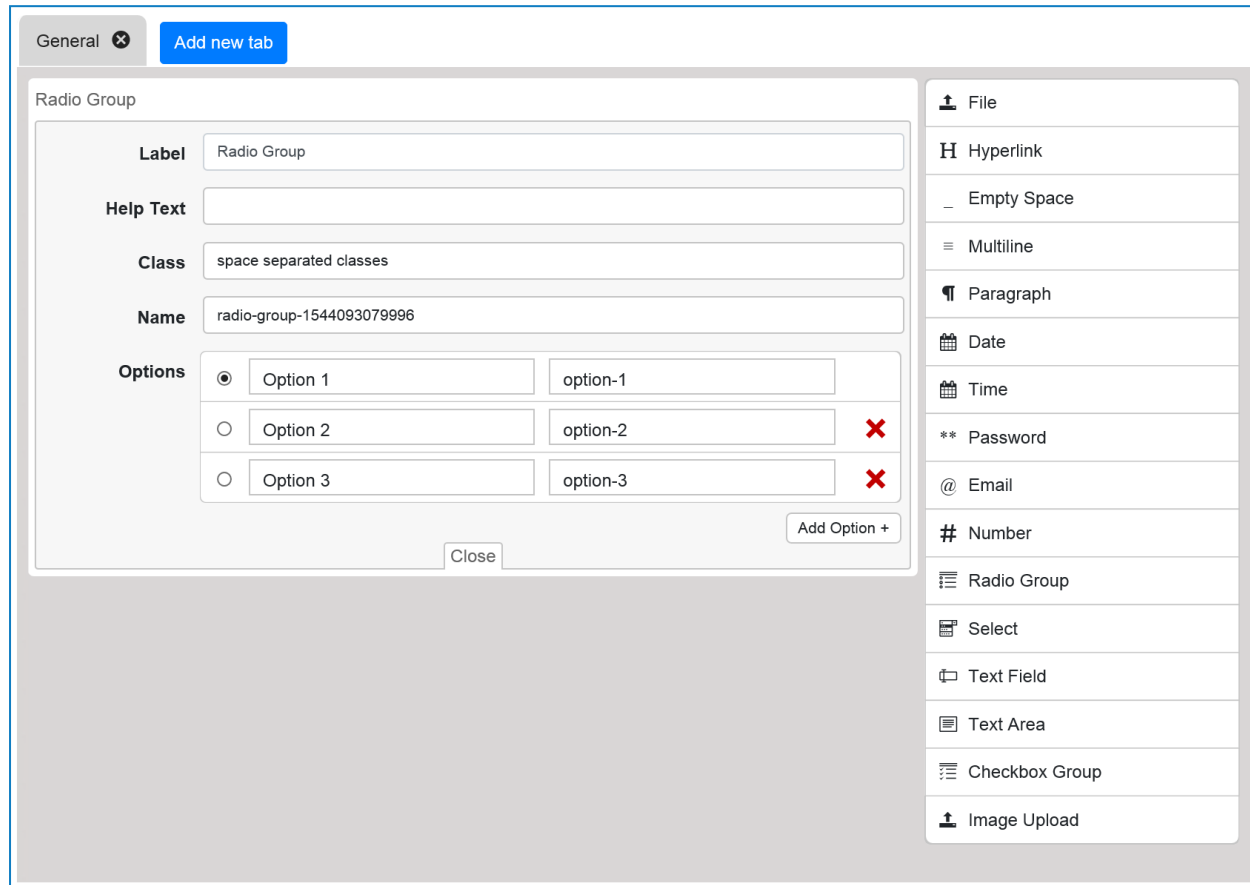
- Label:** Number
- Help Text:** (empty field)
- ☐ Purge upon submission
- Class:** form-control
- Name:** number-1544092998907
- Value:** Value
- Placeholder:** (empty field)
- Min:** (empty field)
- Max:** (empty field)
- Step:** (empty field)
- Close** button

On the right side, there is a list of other interact elements that can be added to the form:

- File
- Hyperlink
- Empty Space
- Multiline
- Paragraph
- Date
- Time
- Password
- Email
- Number
- Radio Group
- Select
- Text Field
- Text Area
- Checkbox Group
- Image Upload

## Radio Group element

The radio group provides an option radio button that the user can choose from. By default, three are provided, though this could be reduced to two and increased as required. The user can only select one radio button before submitting the form if you need to allow a choice of options then the Checkbox Group element should be used.




## Select element

The select element is similar to the Radio Group element in that it allows the user to choose a single entry from a variety of options. However rather than radio buttons to choose from the user is presented with a drop-down menu. Three options are provided by default and this can be reduced to two and increased as required.

The screenshot shows the configuration window for a 'Select' element. The window has a 'General' tab and an 'Add new tab' button. The main configuration area includes fields for 'Label' (containing 'Select'), 'Help Text', 'Class' (containing 'form-control'), and 'Name' (containing 'select-1544093183766'). Below these is the 'Options' section, which displays three options: 'Option 1' (selected with a radio button), 'Option 2', and 'Option 3'. Each option has a corresponding text input field to its right, containing 'option-1', 'option-2', and 'option-3' respectively. Red 'X' icons are visible next to the input fields for 'Option 2' and 'Option 3'. At the bottom of the options section is an 'Add Option +' button. A 'Close' button is located at the bottom right of the configuration area. On the right side of the window is a vertical list of available interact elements: File, Hyperlink, Empty Space, Multiline, Paragraph, Date, Time, Password, Email, Number, Radio Group, Select, Text Field, Text Area, Checkbox Group, and Image Upload.

## Text Field element

This element allows a user to submit text into the work queue for automation processing. The field can be restricted to a defined set of characters (including spaces) if required.

General 

Add new tab

Text Field

Label

Text Field

Help Text

☐ Purge upon submission

Class

form-control

Name

text-1544093248238

Value

Value

Variable

None

▼

Placeholder


Type


text


▼


Max Length


Close


 File


 Hyperlink


 Empty Space


 Multiline


 Paragraph


 Date


 Time


 Password


 Email


 Number


 Radio Group

 Select

 Text Field

 Text Area

 Checkbox Group

 Image Upload

## Text Area element

Similar to the Text Field element this element allows a user to submit text, but rather than restricting to a single line the user can use Carriage Returns/Line Feeds to enter multiple lines. A maximum length can be specified though each Carriage Returns/Line Feeds will be used as one of these characters.

The screenshot shows the 'Text Area' configuration window in the Blue Prism Interact tool. The window has a 'General' tab and an 'Add new tab' button. The main configuration area contains the following fields and options:

- Label:** Text Area
- Help Text:** (empty field)
- ☐ Purge upon submission
- Class:** form-control
- Name:** textarea-1544093359149
- Value:** Value
- Placeholder:** (empty field)
- Type:** textarea (dropdown menu)
- Max Length:** (empty field)

A 'Close' button is located at the bottom right of the configuration area. On the right side of the window, there is a vertical list of other interact elements that can be added to the page:

- File
- Hyperlink
- Empty Space
- Multiline
- Paragraph
- Date
- Time
- Password
- Email
- Number
- Radio Group
- Select
- Text Field
- Text Area
- Checkbox Group
- Image Upload



## Checkbox Group element

The checkbox group element is the multiple-choice option for the user. The user can choose from a selection of checkboxes. In this scenario the user can leave all boxes unticked if the field has been declared as optional. The user is also allowed to select multiple boxes.

The screenshot displays the configuration interface for a 'Checkbox Group' element in the Blue Prism Interact editor. The interface is divided into a main configuration area on the left and a right-hand sidebar containing a list of available interact elements.

**Main Configuration Area:**

- General Tab:** The active tab, with an 'Add new tab' button next to it.
- Label:** A text field containing 'Checkbox Group'.
- Help Text:** An empty text field.
- Toggle:** A checkbox that is currently unchecked.
- Class:** A text field containing 'space separated classes'.
- Name:** A text field containing 'checkbox-group-1544093441718'.
- Options:** A section containing a list of options. The first option, 'Option 1', is selected (checked). A text field next to it contains 'option-1'. There is an 'Add Option +' button to the right of the options list.
- Buttons:** 'Close' and 'Add Option +' buttons are located at the bottom right of the configuration area.

**Right-Hand Sidebar (Interact Elements List):**

- File
- Hyperlink
- Empty Space
- Multiline
- Paragraph
- Date
- Time
- Password
- Email
- Number
- Radio Group
- Select
- Text Field
- Text Area
- Checkbox Group (highlighted)
- Image Upload

## Image Upload element

Similar to the File element this element allows the user to upload an image file to the Blue Prism work queue for processing. The image size loaded has to be a minimum size of 600x600 pixels and maximum size of 900 x 900 pixels.

General
Add new tab

Image Upload

Label

Image Upload

Help Text

☐

Purge upon submission

Class

space separated classes

Name

imageFile-1544093513648

Value

Value

Close

File

Hyperlink

Empty Space

Multiline

Paragraph

Date

Time

Password

Email

Number

Radio Group

Select

Text Field

Text Area

Checkbox Group

Image Upload

## Interact restrictions

This section covers user's rights, process field limitations & access levels.

### User rights

- **User Groups** – Allows for locally created users to be placed in user groups. User groups could be created according to department e.g. finance, HR or by user group purpose e.g. Developers, IT Support etc.
- **Process Categories** – Process categories can be assigned to users which allows for restrictions to be implemented as to the level of access a user has to the processes on Interact.
- **LDAP Sync** – Allows for Interact to integrate with an organization's active directory using an LDAP connection. User names and passwords and user groups are inherited from the LDAP sync.
- **Password Management** – As soon as a user has been created on Interact, an automated email will be sent to the user's email address (using the specified SMTP settings). This email will provide the user with their username and will prompt them to create their password. Password management therefore resides with the end user and is not stored locally within Interact.

## Process form field restrictions

Field	Datatype	Applicable Restrictions
File	File attachment	Restricted to locally stored files. Help text can be set. Set field label. Set field name.
Hyperlink		Provide a specific URL and link text.
Empty Space	-	Set height of space.
Multiline	Alphanumeric	Set number of columns. Help text can be set. Set field label.
Paragraph	Text	No character restriction. Can set Bold, Italics and underline.
Date	Date	When selecting a date, a calendar will pop out for you to select a date. The date format is set to YYYY/MM/DD. Help text can be set. Set field label. Set field name.
Time	Number	When selecting a time, a drop down will appear with a list of predefined times to choose from. The times increase by 10 mins e.g. 03:20:00, 03:30:00, 03:40:00 etc. The time format is set to HH:MM:SS. Help text can be set. Set field label. Set field name.
Password	Text	Currently no restrictions. Help text can be set. Set field label.
Email	Email address	Requires a legitimate email address i.e. requires an '@' symbol. Help text can be set. Set field label. Set field name.
Number	Number	Minimum Value and maximum value can be set. Step value can be set. Help text can be set. Set field label. Set field name.
Radio Group	-	Set number of options. Formats options as radio buttons to select. Restricts selection to one option Help text can be set. Set the Radio Group field to be required. Set field label. Set field name.
Select	-	Provides a dropdown list to display options. Set number of options. Restricts selection to one option or can allow multiple options to be selected. Set field label. Set field name.
Text Field	Text	Maximum length can be set. Help text can be set. Variable will set the text field to a field within your profile e.g. Username, Email, Department. Set field label. Set field name.
Text Area	Text	Maximum length can be set. Help text can be set. Set field label. Set field name.
Checkbox Group	-	Set number of options. Formats options as check boxes to select. Multiple elections can be made. Help text can be set. Set the Checkbox Group field to be required. Change checkboxes to toggles. Set field label. Set field name.
Image Upload	Image attachment	Restricted to JPEG and PNG images with min 600x600 and max 900x900 pixels sizes. Help text can be set. Set field label. Set field name.

## Interact accessibility

Interact has three layers of access that can be implemented:

- Web Server only access
- Platform only access
- Access to Interact that is external from the platform

If the URL is set to “localhost” and the assigned port is closed on the NSG, Interact will only be accessible from the Web Server. If the URL is set to the hostname e.g. **http://gbazssws01:<port>/login** and the assigned port is opened on the NSG to point to the IP’s of the platform, Interact will be accessible from across the platform. To make Interact externally accessible, the NSG rule to open the Interact port needs to either point to a network IP or set to any to make it publicly accessible.