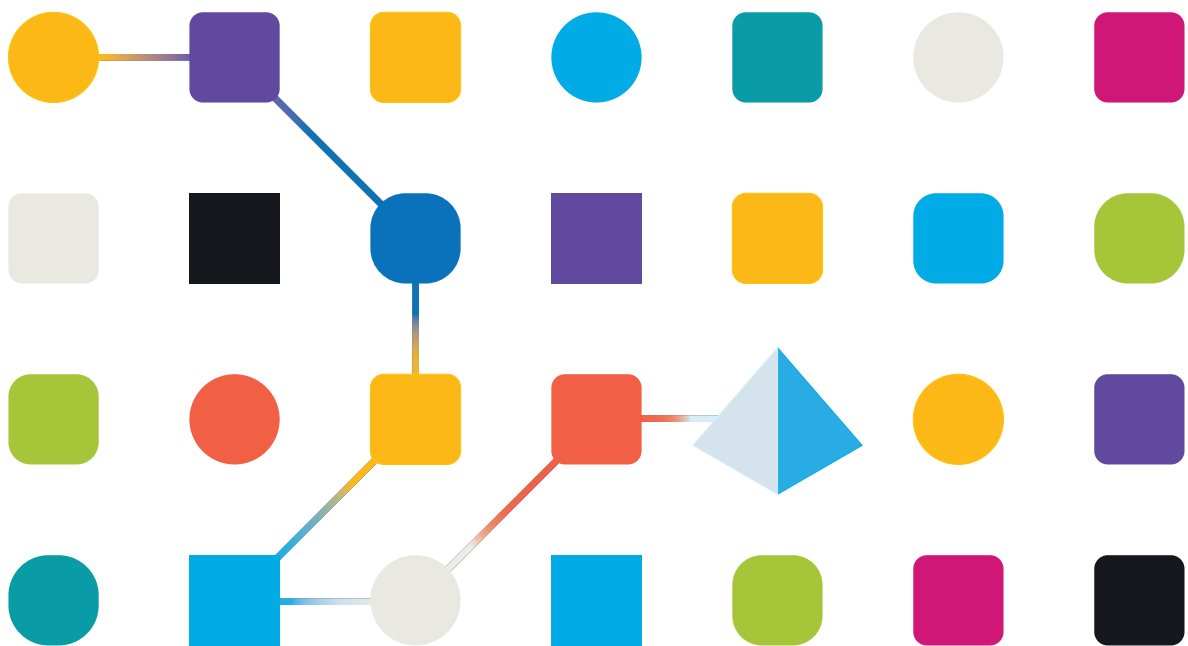




Capture 3.2

Best Practice Guide

Document Revision: 1.0



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Introduction

This guide provides the Blue Prism best practice guidelines for using Capture and is intended for the automation team and process analysts who lead process discovery and definition phases of project delivery.

This guide contains the following sections:

- [Business engagement guidelines](#) – Best practice during business engagement.
- [User journey guideline](#) – Best practice during the end-to-end user journey.

Business engagement guidelines

The following guidelines are intended for the automation team and process analysts during business engagement in order to achieve success with Capture:

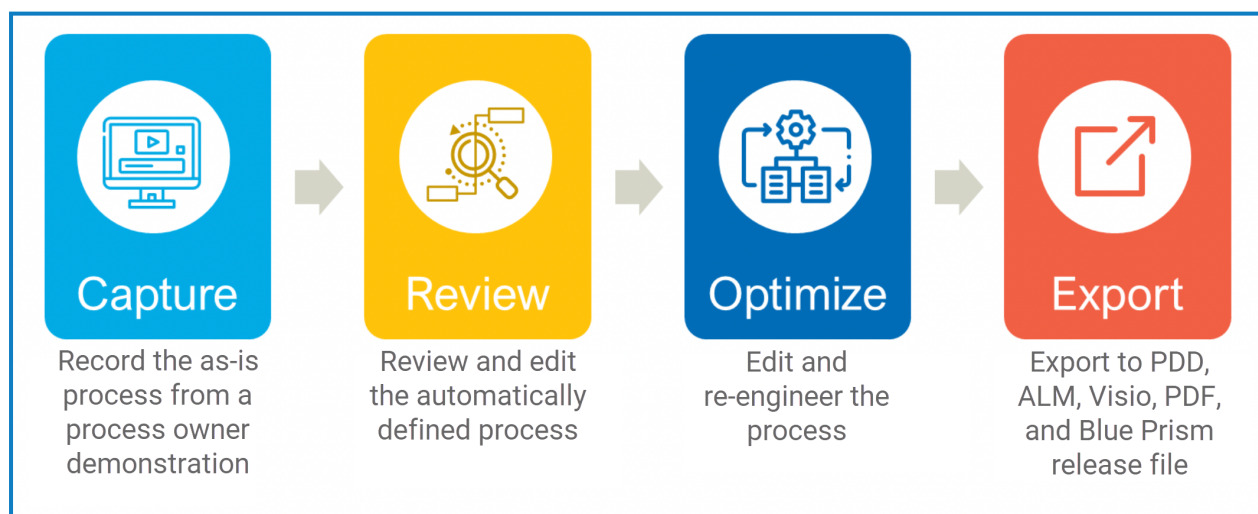
It is recommended that:

- The process owner reads the [Capture documentation](#) and watches the [demo video](#) before installation and use.
- The process analyst holds a meeting with the process owner to demonstrate the use of Capture end-to-end, with a focus on the initial process recording and editing.
- The process analyst holds a video meeting with the process owner while they complete the Capture recording, to allow the automation team to follow along with the process and support with process editing.
- The process analyst sets the expectation with the process owner that this is a collaborative process and several iterations and refinement sessions may be required to capture the required level of detail.

User journey guidelines

The following guidelines are intended for the automation team during the end-to-end user journey from recording a process to exporting.

The following guidelines follow the end-to-end user journey:



The user journey guidelines are organized into the following sections:

- [Installation guidelines](#) – Best practice during installation.
- [Capture guidelines](#) – Best practice during process recording.
- [Review guidelines](#) – Best practice during process editing.
- [Optimization guidelines](#) – Best practice during process re-engineering.
- [Export guidelines](#) – Best practice during process completion.

Installation guidelines

This section outlines the recommended best practice when installing Capture. See the [Install Guide](#) for more information.

To distribute Capture on all business user machines in a self-service model, consider using one of the following methods:

- Install Capture on your company-wide application library. If you choose this method, consider performing a scripted installation using PowerShell to reduce the initial IT security review effort.
- Place Capture in a shared location for users to either install (MSI) or download (EXE) to process owner machines as required.

All members of your automation team should have Capture readily available for reviewing and storage of processes from process owners.

Capture guidelines

This section outlines the recommended best practice when recording processes using Capture.

It is recommended that:

- The process owner enables Application Modeller capability in the [user settings](#) before recording. This will turn on automatic password censoring during process recording.
- The process owner enables all options in the [Business objects user settings](#) to generate objects and Application Modeller data automatically, so that they can export blue prism processes to hand over to the process developer as a starting point.



Ensure the object and action naming adheres to Blue Prism or local design best practices.

- The process owner aligns screens horizontally and sets the scaling of the monitors to be identical. Single or dual monitors are supported.
- While recording a process, the process owner steps through the process at a slow to medium pace. This provides Capture with the best opportunity to identify every action during process demonstration. Features are available within the product to add or update any steps which need to be edited.

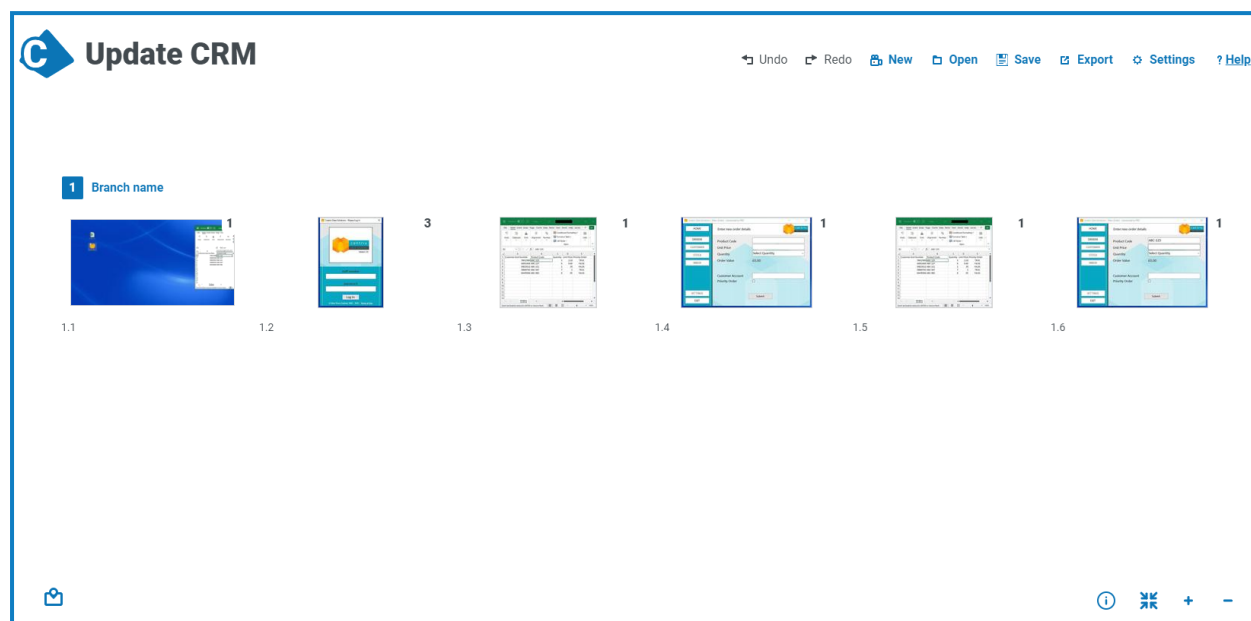
Review guidelines

This section outlines the recommended best practice when reviewing and editing Capture processes.




It is recommended that the process owner and process analyst read the [User Guide](#) to understand how recorded processes are organized and presented in Capture.

Once the process owner has completed their Capture recording, they are presented with a single process path in Capture:




Before reviewing, it is recommended that the process owner completes the following steps:

1. [Name the process](#) and click **Confirm**.
2. Check the overall process map to make sure the recording has completed successfully. If there are any issues, such as the recording being incomplete or screenshots that are blank, review the [Install Guide](#) and [FAQs](#).

 It is recommended that the process owner and process analyst review the Captured process together using Capture in a video meeting, so that knowledge of the process is shared with the process analyst and that the process is appropriately represented and edited. Both the process analyst and the process owner must understand how a Capture process is represented during the process review.

During the review, it is recommended that the process owner completes the following steps:

1. Click the pencil icon next to the branch, group, and step names to update them.
2. Fully populate the [Step action data](#) where appropriate, including accurate and concise details of the action taking place, and an appropriate Object and Action name when required.
3. Review and edit [bounding boxes](#) as required.
4. [Censor](#) any sensitive data not obscured by Capture.

 Working knowledge of available Blue Prism Objects is required when updating the required Object/Action information in order to avoid duplication and ensure adherence to design standards.

5. If required, [add decision points](#).
6. If required, [insert other saved recordings into the process](#).
7. Once the process owner has finished reviewing and editing and the process analyst has confirmed that the process is complete, save the process and export the required [export types](#).


Optimization guidelines (optional)

This section outlines the recommended best practice when re-engineering Capture processes.

Once the process is signed off and has been exported and saved as the required [export types](#), the process analyst can optionally begin editing the process to be more suitable for digital workers.

It is recommended that the process analyst:

- Adds processes from other process owners to piece together a larger process for Blue Prism to execute.
- Removes steps in the process that a human would do but a Blue Prism digital worker would not.
- Re-structures the process at the process map level to more efficiently complete the business goal of the process and remove unnecessary actions.

 It is recommended that the process owner signs off the optimized process to ensure the business goals of the process are still achieved whilst making the process more efficient for automation.

Export guidelines

This section outlines the recommended best practice when exporting processes from Capture.

Once the process has been edited and optionally optimized, a number of [export types](#), can be exported.

It is recommended that:

- Exported files are stored in a shared location accessible to the automation team. This is so process developers can easily access everything they need to begin design and development phases.
- The Blue Prism release file is exported with the Blue Prism best practice process template option enabled in the [user settings](#). This will provide the process developer with a robust starting point for the process design in Blue Prism.
- The exported documentation is completed and optimized in accordance with appropriate process definition and governance requirements (for example, the [Blue Prism ROM Delivery Model](#)).