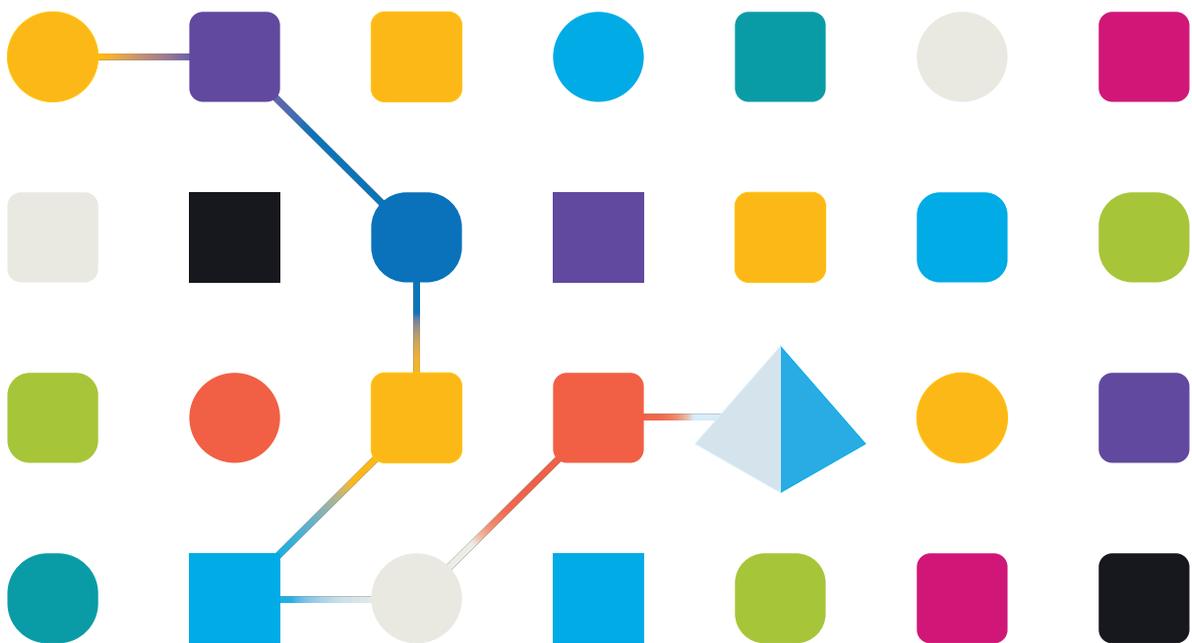




Capture 3.2

User Guide

Document Revision: 1.0



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About Capture

Blue Prism Capture is an intelligent process capture platform that simplifies the creation of process definition documents (PDDs) by combining task extraction and computer vision to auto-generate screenshots, step descriptions, process data, and process flows from a process owner demonstration. Customers can then optimize the process by adding or modifying steps and then extract their completed PDD, more quickly and accurately, into their preferred file format, including a Blue Prism process outline, which reduces time to automation even further.

Functionality

- **Capture** – Automatically capture each step of a process from a process owner demonstration.
- **Review** – View the process map and individual steps that have been captured. Step through the process flow to review each step and description to ensure the process is reflected at the detail desired. Add decision diamonds to show process exceptions and branching paths where needed.
- **Optimize** – Optimize the process by rearranging and grouping actions from the as-is process to reflect the to-be process flow of the RPA solution. Customize each step by adding further descriptions, notes, or key-stroke level actions, without having to re-capture the process.
- **PDD export** – Export the full PDD in Microsoft Word format.
- **bprelease export** – In Blue Prism best practice format, or as a skeleton of the process, export the process and business objects as a BPRELEASE file for import into Blue Prism 6.4 or later.
- **Capture process export** – Export your Capture process, or an ALM process definition, as a JSON file.
- **Process map** – Generate a PDF or Visio file of the process map, reflecting the process display in Capture.

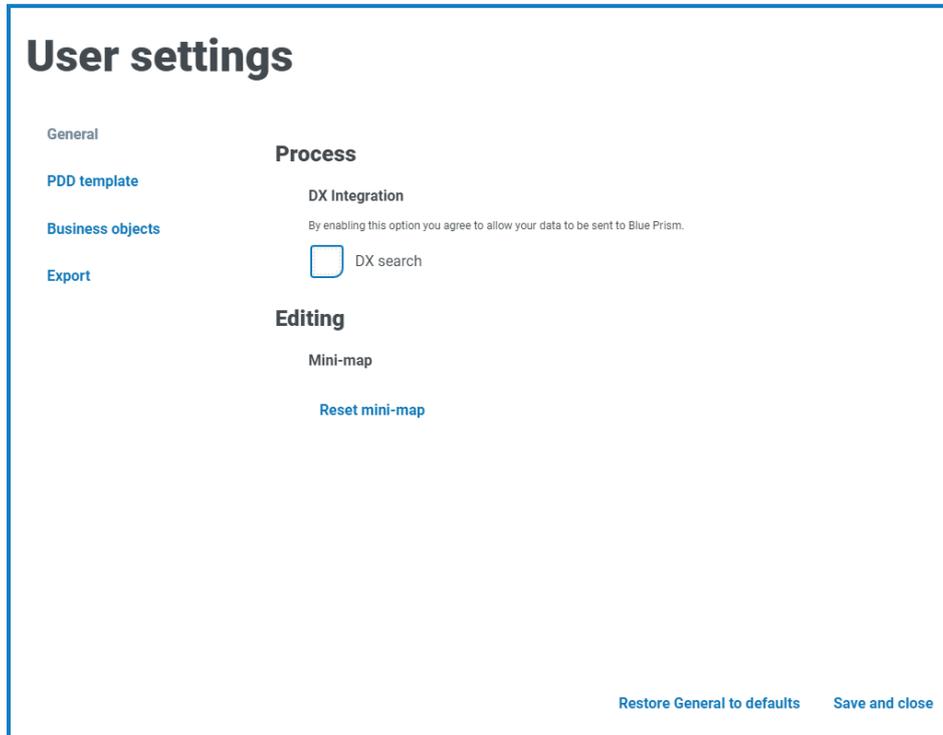
User Settings

The User Settings dialog can be used to configure your own Capture preferences.

General tab

When you open the User settings, the General tab displays by default. The General tab has two sections: Process and Editing.

You can change the values in these sections, as described below. You can revert the settings back to the default settings by clicking **Restore General to defaults**.



Process

The following options are available:

Option	Description
DX Integration	Select the DX search check box to enable the DX Search button on the Capture toolbar. The DX search function helps you find and download the most appropriate assets (such as VBOs) for the current process. See Perform a DX search



By selecting the **DX Search** check box, you are giving consent for your data to be sent to Blue Prism.

Editing

The following options are available:

Option	Description
Mini-map	Click Reset mini-map to restore the mini-map to its default size and position.

PDD template tab

The PDD template tab has three main sections: Preview, Branding, and Process. You can change the values in these sections, as described below. You can revert the settings back to the default settings by clicking **Restore PDD template to defaults**.

User settings

- General
- PDD template
- Business objects
- Export

Preview



Branding

Company logo

Supported file types are PNG, JPG, and JPEG. Recommended file size is 5 KB or larger.

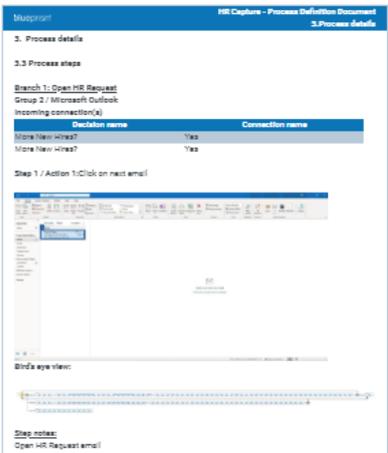
No logo uploaded yet

Restore PDD template to defaults
Save and close

Preview

A preview of the Process Definition Document is displayed here. As you edit the color theme and upload a company logo the preview will automatically update to display the changes you make.

Preview

Branding

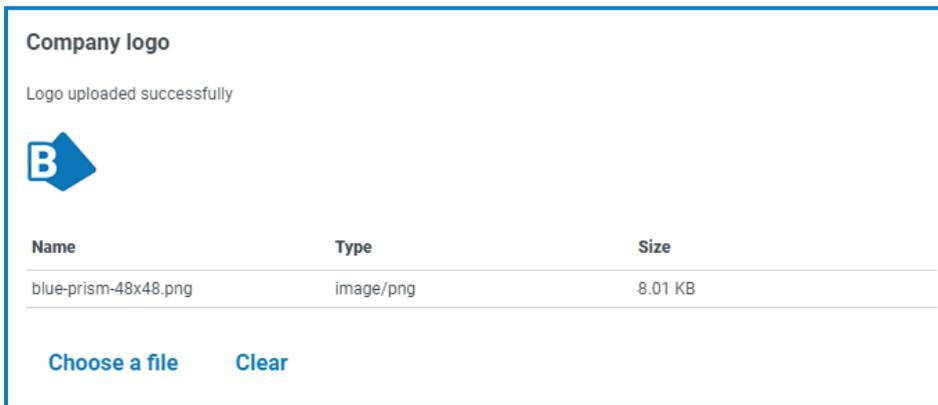
The following options are available:

Option	Description
Company logo	Allows you to upload your own company logo for inclusion in the exported Process Definition Document. See Upload a company logo .
Colors	Allows you to customize the colors of the front cover, headers, and tables in your Process Definition Document. See Select colors .

Upload a company logo

1. Click **Choose a file**.
2. Navigate to the required image and click **Open**.

A thumbnail image of the uploaded file displays with a confirmation that the upload was successful.

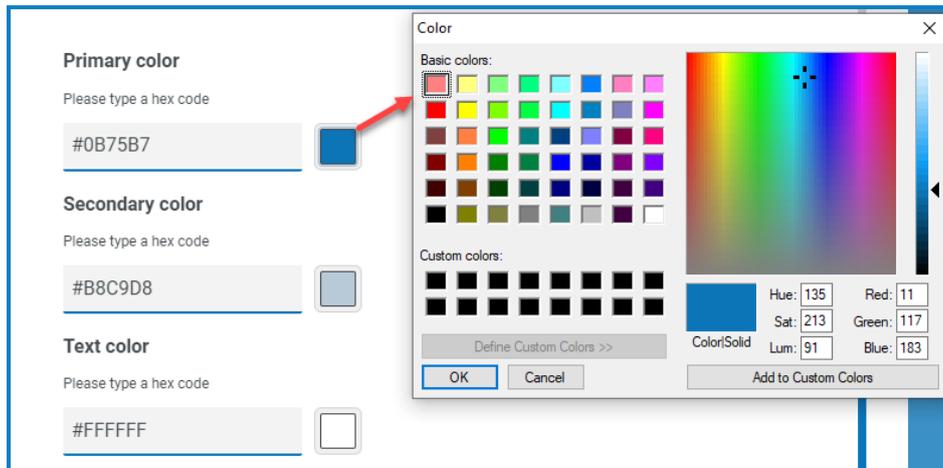


- Click **Clear** to remove an uploaded logo.
- Click **Choose a file** to replace an uploaded logo.

 Capture supports PNG, JPG, and JPEG file types. The recommended file size is 5 KB or larger. The recommended file type is a PNG file with a transparent background.

Select colors

This section has the following options for customizing your Process Definition Document (PDD):



- **Primary color** – To select the color for the front cover, header area and table header rows, either type a hex code into the text field or click the colored box to open a color picker.
- **Secondary color** – To select the color for alternate table rows, either type a hex code into the text field or click the colored box to open a color picker.
- **Text color** – To select the color for the default white text on the front cover and in table headings, either type a hex code into the text field, or click the colored box to open a color picker.

 When entering a hex code directly into the color fields, use the following format: #XXXXXX (a hash followed by 6 alpha numeric characters).

Process

The following options are available:

Bird's eye view

Option	Description
Show full bird's eye view	Select this option to display the entire process map in the exported PDD.
Show focused bird's eye view	Select this option to display the current step and any surrounding steps in the exported PDD.
Disable bird's eye view	Select this option to not display a bird's eye view in the exported PDD.

Business objects tab

You can change the values in these sections, as described below. You can revert the settings back to the default settings by clicking **Restore Business objects to defaults**.

User settings

General

PDD template

Business objects

Export

Business objects

Application Modeller data will be captured for all user actions. Business object fields will be populated as part of the capture process.

Show business objects

Enable Blue Prism Application Modeller spying

Auto-generate business object fields

Clear all Object and Action names

Uncheck all 'Create object' checkboxes

[Restore Business objects to defaults](#) [Save and close](#)

Business objects

The following options are available:

Option	Description
Show business objects	Select the Show business objects check box to display the business object fields and Create object check box in the Step action panel. See Create business objects .
Enable Blue Prism Application Modeller Spying	If required, you can deselect the Enable Blue Prism Application Modeller spying check box to disable the business object functionality and password censoring. For more information, see Application Modeller spying .
Auto-generate business object fields	Select the Auto-generate business object fields check box to automatically populate the Create object fields for each step in new Capture processes. For every step action, the Create object check box will be automatically selected. This will not affect existing open processes.
Clear All object and Action names	Click Clear All object and Action names to remove all information from the Create object fields each step action. Saving and closing the User settings panel places an action number above Undo on the main process screen. Click Undo to revert the action if required.
Uncheck all 'Create Object' check boxes	Click Uncheck all 'Create Object' check boxes to deselect any selected Create object check boxes for each step action. Saving and closing the User settings panel places an action number above Undo on the main process screen. Click Undo to revert the action if required.

Option	Description
Restore Business objects to defaults	Click Restore Business objects to defaults to revert any changes you have made to the default settings.

Export tab

You can change the values in these sections, as described below. You can revert the settings back to the default settings by clicking **Restore Export to defaults**.

User settings

- General
- PDD template
- Business objects
- Export

Blue Prism process template

This option will apply Blue Prism best practices to your exported process (.bprelease). For further details on changes to this export option, see the breakdown of the template in Help.

Apply best practices to .bprelease export

PDF process map

Split branches into individual pages on export

Collapse groups on export

[Restore Export to defaults](#) [Save and close](#)

Blue Prism process template

The following export options are available:

Option	Description
Apply best practices to .bprelease export	This option applies the Blue Prism best practice template to your exported process (BPRELEASE). See The Blue Prism best practice process template .

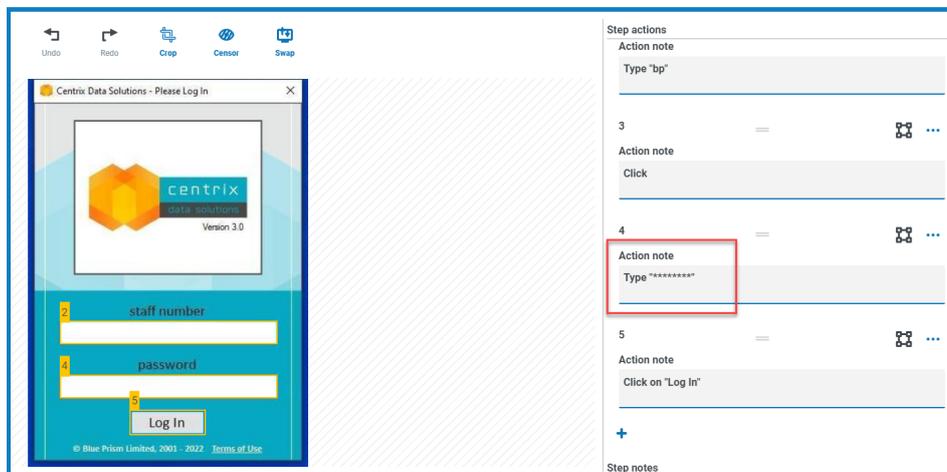
PDF process map

The following options are available:

Option	Description
Split branches into individual pages in PDF on export	Displays one branch on each page of the PDF process map export. The full process map is displayed on the first page.
Collapse groups on export	Only displays the first two screenshots for each group in the PDF process map. The total number of steps in each collapsed group is displayed under the collapsed-group screenshots.

Censor or omit sensitive data

If application modeller spying is enabled in the [user settings](#), Capture automatically censors text entered into password fields by replacing each letter of the password with an asterisk.



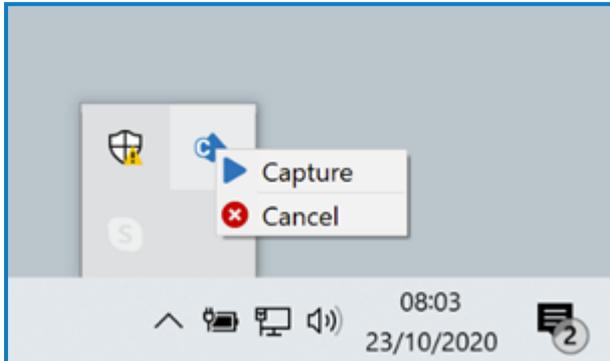
Additionally, there are a number of ways to manually censor, omit, or remove data, if required:

- [Omit data during capture](#)
- [Remove data after capture](#)
- [Censor data in screenshots](#)

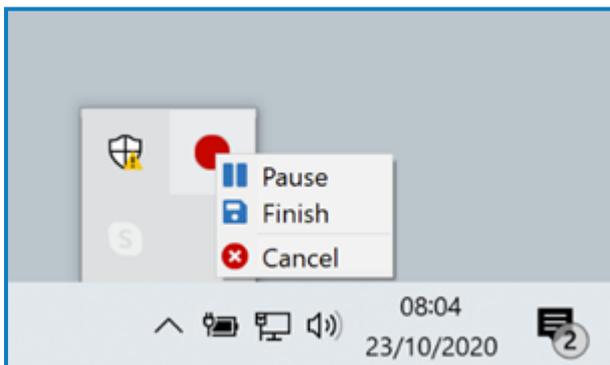
Omit data during capture

Using Pause to omit data during capture will avoid capturing sensitive data and remove the need for post-capture editing.

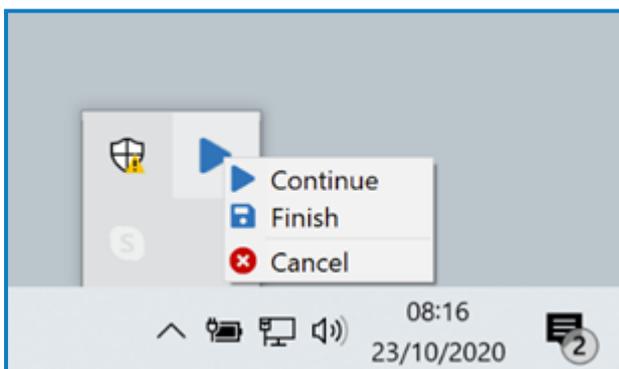
1. To start capturing, click the Capture icon in the task bar.



2. When you are at a stage in the process that you do not want to capture, return to the task bar icon (now a red record button during capture), and click **Pause**.



3. When you have completed the section of the process you do not want to capture, click **Continue** to resume capturing.



4. Continue the process, clicking **Pause** when necessary.
5. Save the capture as normal.

Remove data after capture

To remove sensitive data from an existing capture:

1. Open the capture.
2. In Step actions, click on text you want to change and manually delete the sensitive data.



3. Save and close the amended process.

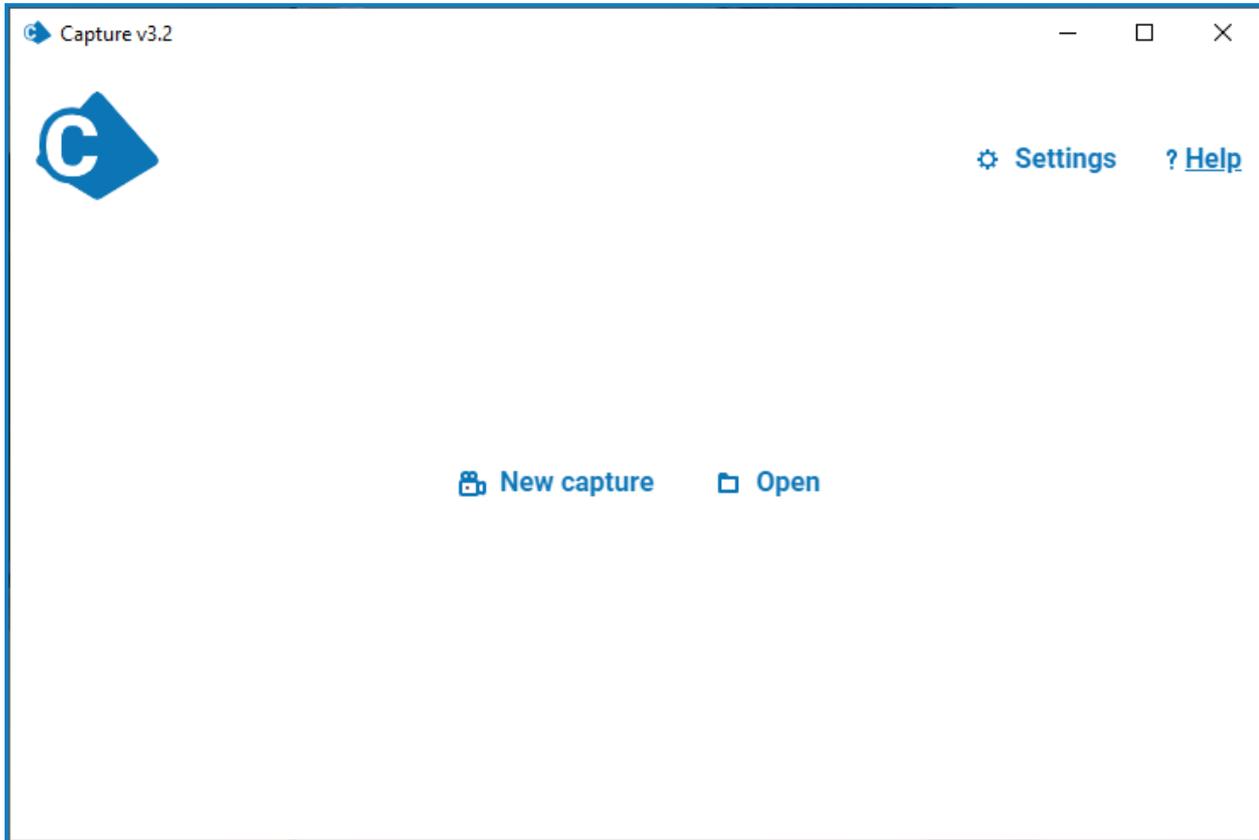
Censor data in screenshots

If a screenshot shows potentially sensitive or private information, you can use the censor tool to black it out.

See [Censor steps](#) for details.

Capture a process

When you open Capture, you can choose to capture a new process or work with one you have already taken.



Open a saved process

1. On the main screen, click **Open** to display a list of all saved processes and the dates they were created.

Load saved process

Process name	Date created	Date last modified	Select
Track expenses	27/04/2022 15:22	27/04/2022 16:53	<input type="checkbox"/>
Manage social	27/04/2022 15:22	27/04/2022 16:51	<input type="checkbox"/>
Update CRM	27/04/2022 15:22	27/04/2022 16:50	<input type="checkbox"/>
Add order	27/04/2022 15:22	27/04/2022 16:49	<input type="checkbox"/>
Report data	27/04/2022 15:22	27/04/2022 16:48	<input type="checkbox"/>
Screen applicant	27/04/2022 15:22	27/04/2022 16:48	<input type="checkbox"/>
Process invoice	27/04/2022 15:22	27/04/2022 16:47	<input type="checkbox"/>
Customer support ticket	27/04/2022 15:22	27/04/2022 16:45	<input type="checkbox"/>

2. Select the process you want to open.
3. Click **Open**.

 You can also import processes using the **Open file** option.

Delete a saved process

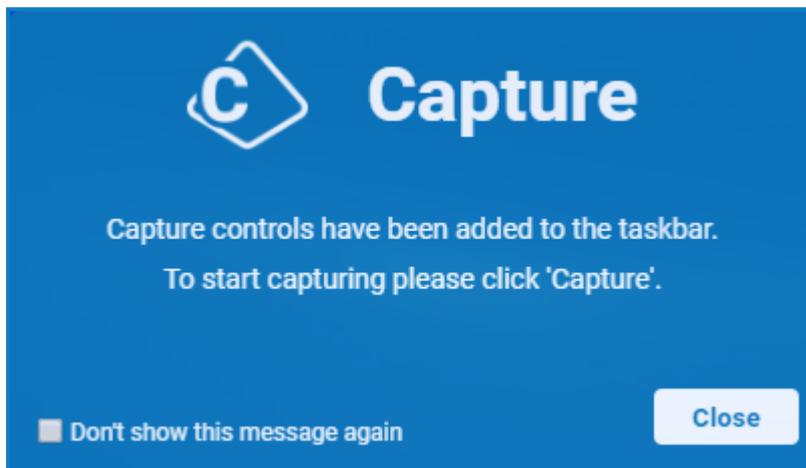
To delete a saved process, select the check box for the process you want to delete and click **Delete**. Alternatively, you can press the Delete key on your keyboard.

A dialog displays asking you to confirm the deletion.

Capture a new process

1. On the main screen, click **New capture**.

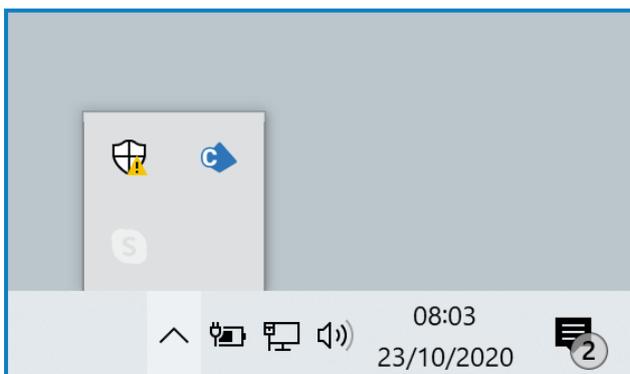
An information dialog displays.



 Capture supports up to two displays. They must both have the same scaling value. For example, if you have a laptop and a separate monitor, select a scaling value (for text, apps and other items) in the Windows Display settings to change the scaling for both displays.

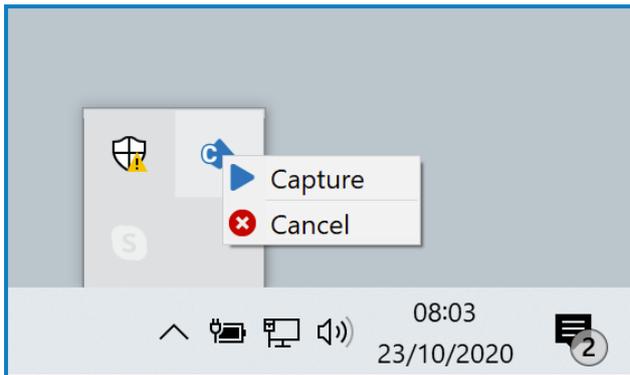
2. Click **Close** to close the dialog.

The browser minimizes and a Capture icon appears in the system tray. Depending on your taskbar settings, this may appear in the bar itself or be hidden within the system tray.

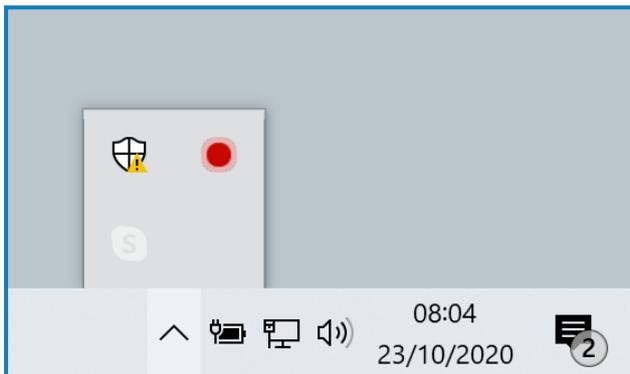


Capturing of the screen has not started at this stage.

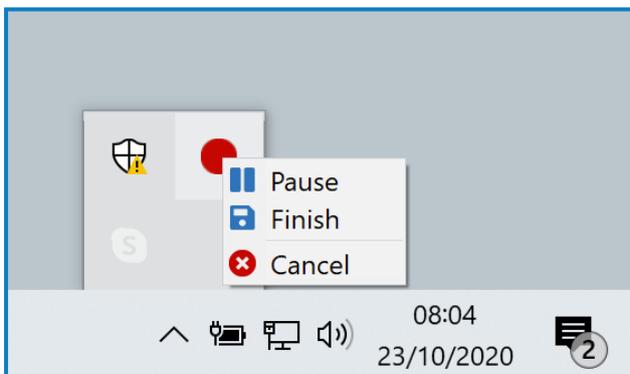
- To start capturing, click the Capture icon and select **Capture**.



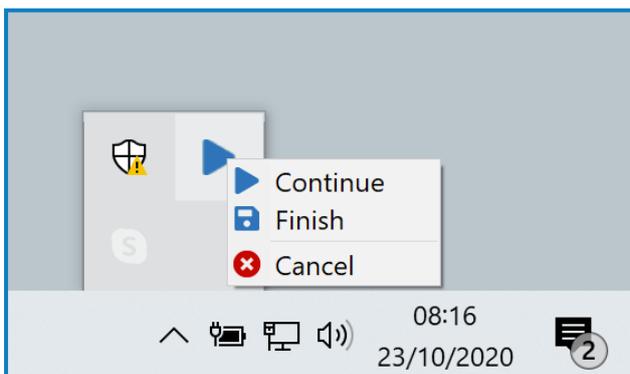
The icon will change to a pulsing red circle indicating that the capture is in progress.



- Complete each step of the process you want to capture as normal.
- Click the Capture icon to pause, finish, or cancel the capture.



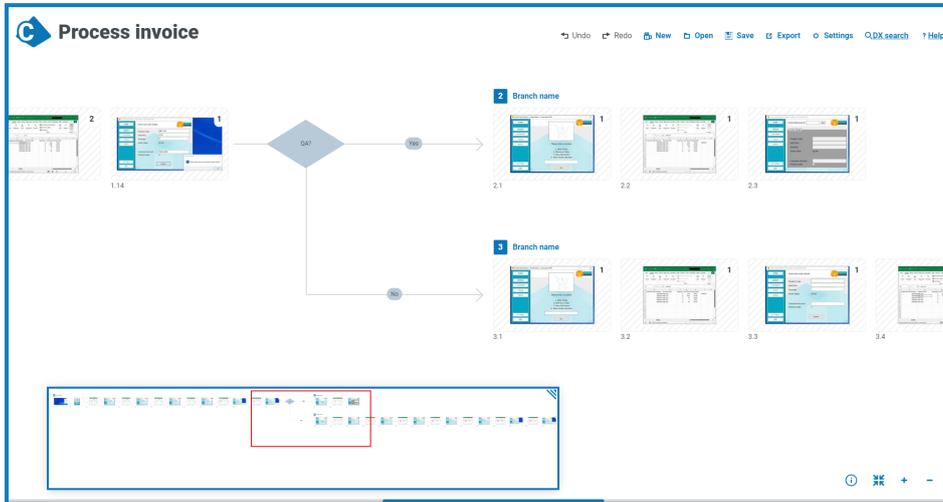
If you select **Pause** the capturing process is paused, so any clicks or actions are not recorded.



6. Select **Finish** to complete the capturing phase – the capture is automatically saved. You are then returned to the main Capture window, displaying the process you just captured.

View your process

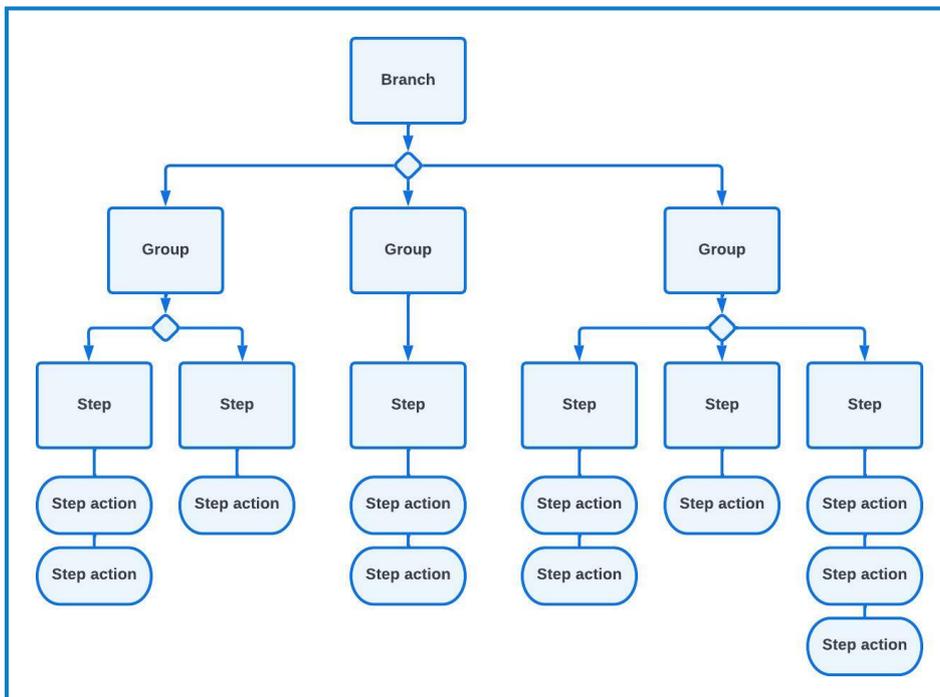
When a Capture recording is complete, the process map automatically opens in Capture. Alternatively, you can [open](#) and view saved processes.



Process map

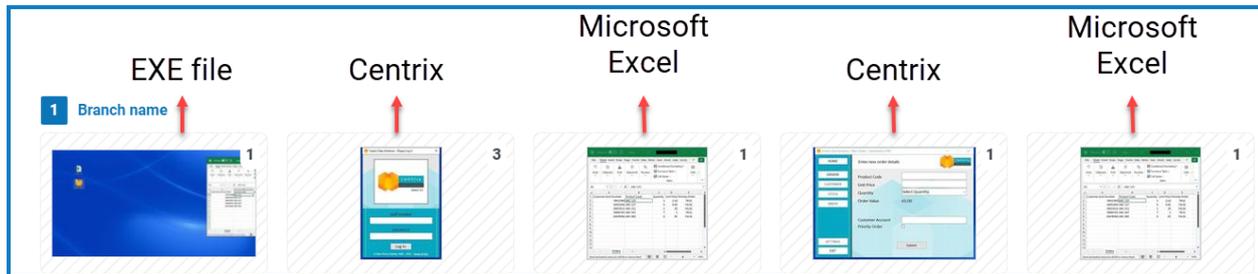
While you are recording your process, Capture automatically creates a process map that flows between the interactions you make with different applications. These interactions are organized into branches that contain groups. Groups contain steps, and steps contain step actions.

The flowchart below shows the hierarchy of elements within a Capture process map.



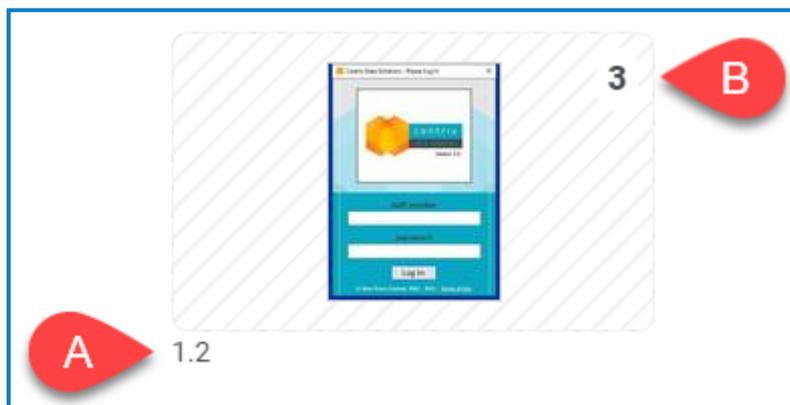
Branches

While you are recording your process, Capture automatically creates a new group in the process branch whenever you switch from one application to another. For more information, see [Branches](#).



Groups

A single image in the process branch represents the interactions you made with a single application before you switched to another application. This is a group.



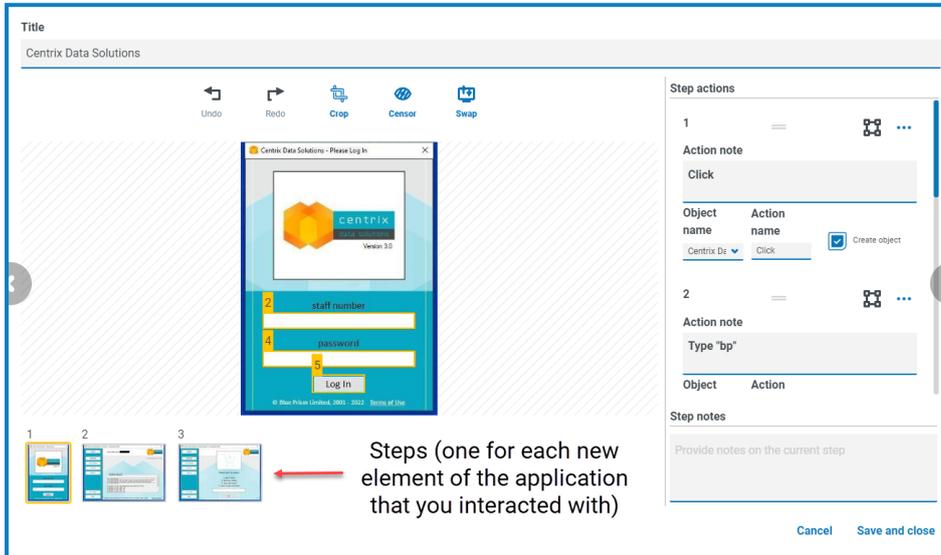
Label	Description
A	Group number label (the order it is placed in the branch).
B	A label for the number of steps within the group (the number of different screens that you interacted with during this interaction with the application).

For information about editing step groups, see [Edit groups](#).

Steps

Every time you interact with a different screen within a single application, Capture takes a new screenshot and gathers information for that specific interaction. These interactions are called steps. They are not visible on the process map.

Click a step overview to open the step editor. Here you can view and [edit each step](#) contained in the group.



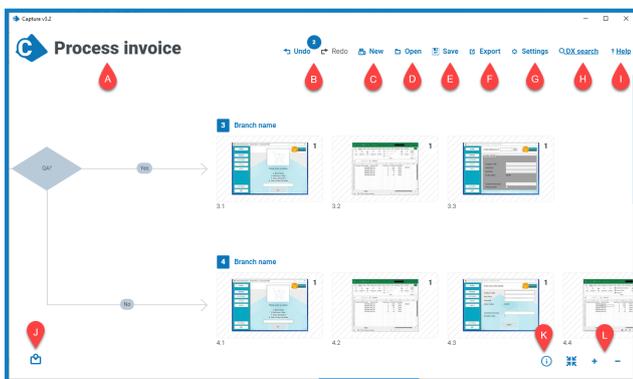
Step actions

Each step represents the interactions you made with a single screen in an application. You may have completed more than one action during this interaction, such as typing into a text field and then clicking a button on the same screen. For more information, see [Edit step actions](#).

Depending on your settings, step action information can be automatically populated when you record your process, and the information gathered can then be exported into Blue Prism to populate Application Modeller. See [Application Modeller spying](#).

Main process screen

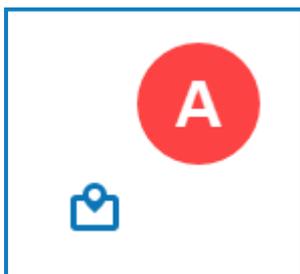
When a Capture recording is complete, the process automatically opens in Capture. Alternatively, you can [open](#) and view saved processes.



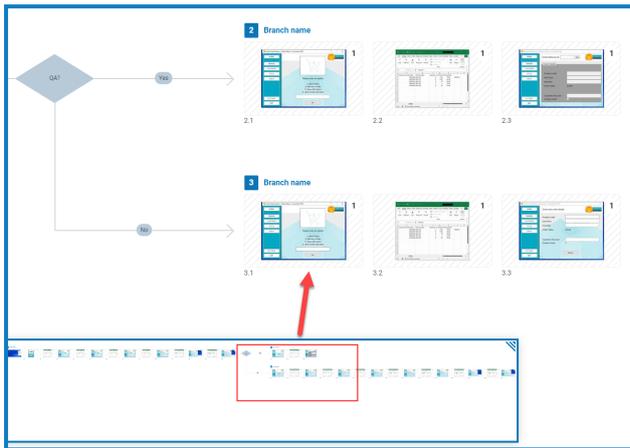
Location	Name	Description
A	Title	Click the title to rename your process.
B	NewUndo Redo	Click Undo and Redo to undo or redo unsaved changes as many times as the number indicated above each button. Once you click Save you can no longer undo or redo any changes. Alternatively, the following shortcut keys can be used: <ul style="list-style-type: none">• Ctrl + Z – Undo• Ctrl + Y – Redo
C	New	Capture a new process. This will overwrite your existing process.
D	Open	Open a previously saved process.
E	Save	Save the current process. You can also press Ctrl + S on your keyboard to save the process.
F	Export	Export your process.
G	Settings	Customize your Capture settings.
H	DX Search	Open the Digital Exchange. Find and download the most appropriate assets (such as VBOs) for the current process.
I	Help	Display the online help in a new tab of your browser.
J	Mini-map	Open and close the mini-map to easily navigate large processes. You can also press Ctrl + M on your keyboard to open and close the mini-map.
K	Information	Open a Process information window.
L	Zoom	Zoom in and out of your process. Alternatively, the following shortcut keys can be used: <ul style="list-style-type: none">• Ctrl + scroll mouse wheel – Zoom in and out of the process map• Ctrl + + – Zoom into the process map• Ctrl + - – Zoomout of the process map

Use the mini-map

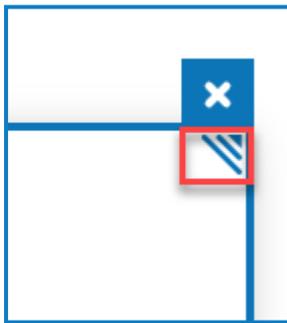
1. To open the mini-map, click the mini-map icon (A). You can also press **Ctrl + M** on your keyboard to open and close the mini-map.



The red box shows which area of the whole process you are currently viewing.



2. Drag the red box to alter the process view.
3. You can move the mini-map anywhere on the screen by dragging it.
4. You can resize the mini-map by dragging the resize icon in the top-right corner.



5. Click **X** to close the mini-map panel.
6. To reset the mini-map, click **Reset mini-map** in [User Settings](#).

View process information

Click the information symbol, in the bottom right-hand corner of the Capture window, to open the Process information panel.

Process information

Process name: HR Capture

Number of branches: 5

Number of decision points: 5

Number of connections: 10

Number of steps: 178

Number of step actions: 238

Number of auto-generated objects in the exported process: 0

[Close](#)

The Process information panel displays the following information about the currently open process:

- The process name
- The number of branches
- The number of decision points
- The number of connections
- The number of connection steps
- The total number of step actions in the process
- The number of auto-generated objects to be exported

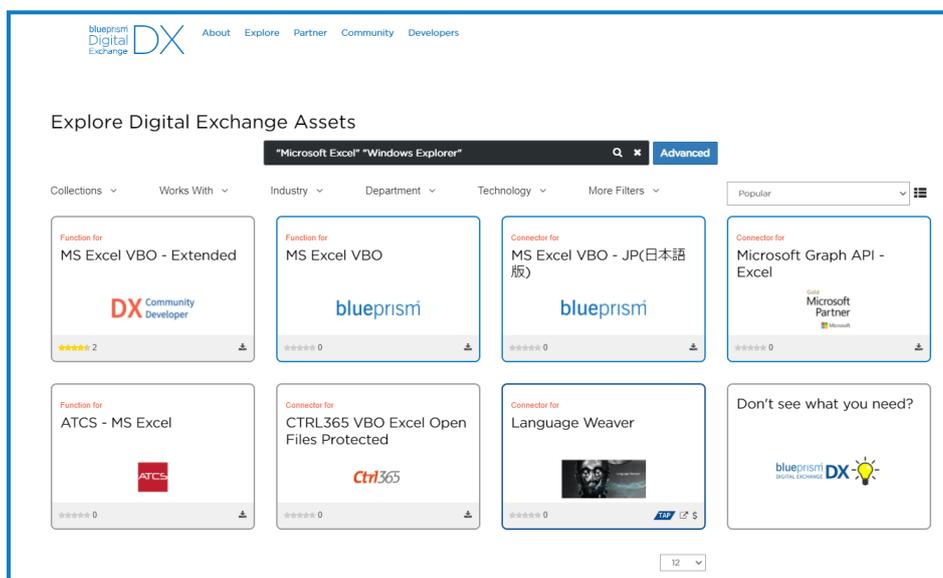
Perform a DX (Digital Exchange) search

To enable the DX search feature, select the **DX search** check box in the **General** tab of the User settings.

When a process is open in Capture, the **DX search** menu item displays in the toolbar.

Undo Redo New Open Save Export Settings **DX search** Help

The DX search feature helps you find and download the most appropriate assets (such as VBOs) for the current process. When you click **DX search**, the Blue Prism Digital Exchange opens in a new tab in your default browser. The search field is automatically populated with the names of the applications in the process and the most relevant and popular assets display in the results pane.



To use the DX search feature:

1. Click **Settings**, select the **DX Search** check box and click **Save and close**.

By selecting the **DX Search** check box, you are giving consent for your data to be sent to Blue Prism.

2. Open or capture a process.
3. Click **DX search** in the toolbar.

The Blue Prism Digital Exchange displays. The search field is automatically populated with any applications in the open capture process and relevant assets display in the browser, sorted by popularity.

4. Log in to the Blue Prism Digital Exchange to download assets. You can then import them into Blue Prism.

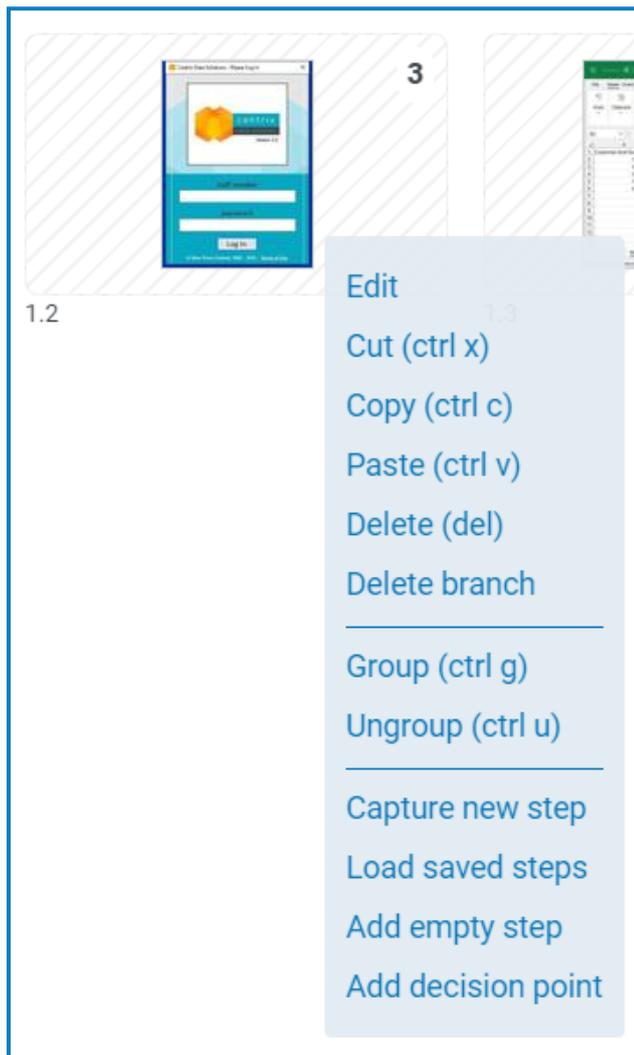
Edit your process

You can edit your process at the group level, step level, and step action level.

- Edit step groups
- Edit steps
- Edit step actions

Edit groups

To edit groups in the main process screen, right-click any step to view a context menu.



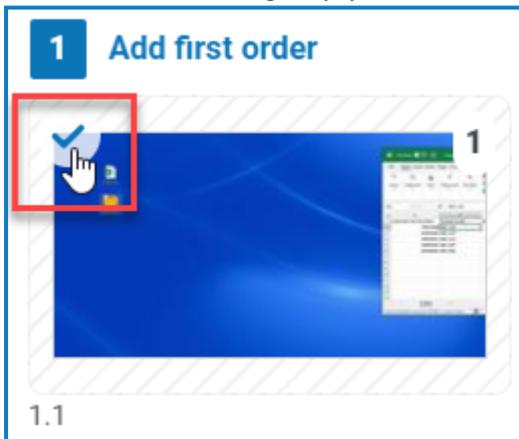
Name	Description
Edit	Open the Edit panel, see Edit steps for details. Clicking the thumbnail will also open the Edit panel.
Cut (ctrl x)	Cut a group. See Cut, copy, and paste step groups .
Copy (ctrl c)	Copy a group. See Cut, copy, and paste step groups .
Paste (ctrl v)	Paste a group. A pasted group will be placed to the right of the selected thumbnail. See Cut, copy, and paste step groups .

Name	Description
Delete (del)	Delete the selected group. See Delete step groups .
Delete branch	Delete the selected group. Any branches connected to that group will also be deleted.
Group (ctrl g)	Group multiple groups together to form a single group (not a group of groups). See Group groups .
Ungroup (ctrl u)	Split any group with two or more steps into individual steps. See Group groups .
Capture new step	Capture an additional step. The new step will appear directly after the current step.
Load saved steps	Load previously saved steps. The new step will appear directly after the current step.
Add empty step	Add an empty placeholder step directly after the current step.
Add decision point	Add branches and connections.

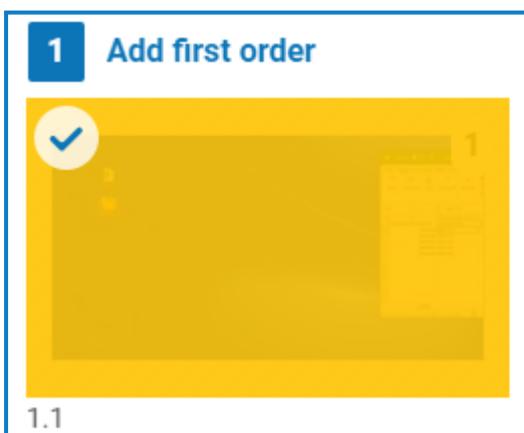
Select groups

To select a single group:

1. Hover over the first group you want to select. A tick symbol displays in the corner of the group.

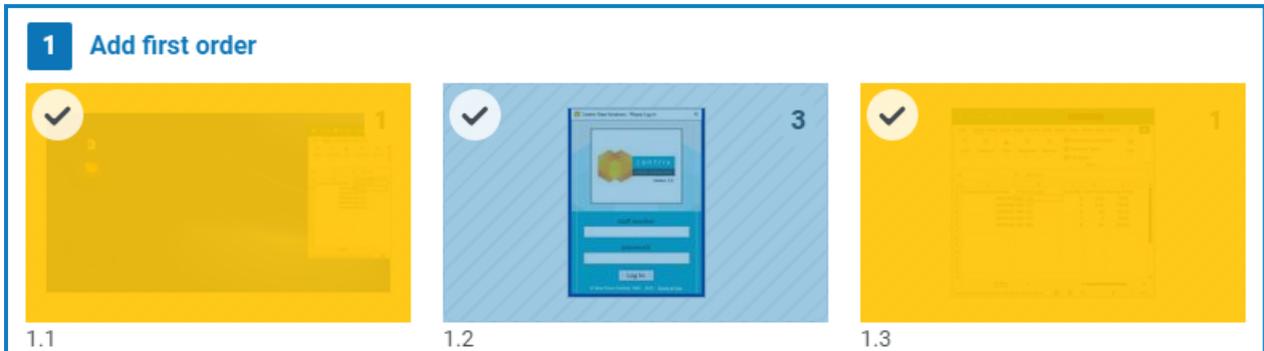


2. Click the tick symbol. The group is highlighted yellow to indicate that it is selected.



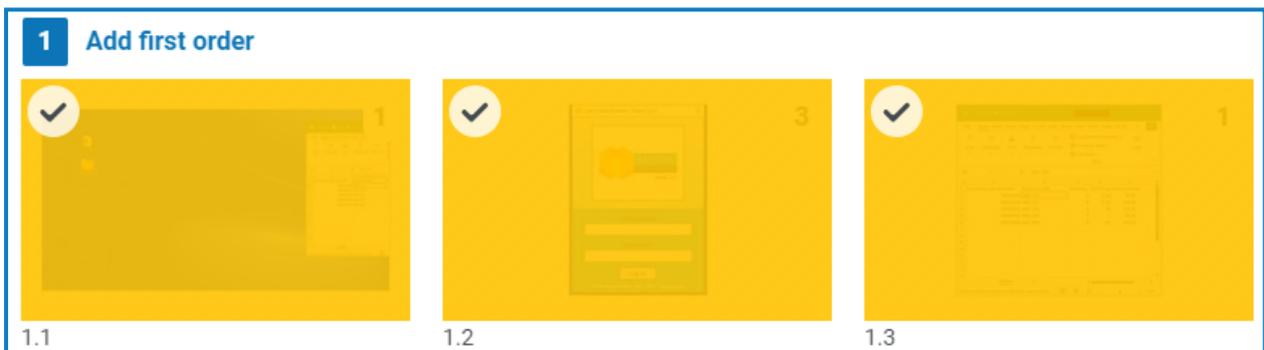
To select multiple step groups individually:

1. Select a single group. All step groups display a tick symbol.
2. Click the tick symbol on each group that you want to select. The selected step groups are highlighted yellow to indicate that they are selected.



To select multiple step groups at the same time:

1. Select a single group. This is the first group in the group that you want to select. All step groups display a tick symbol.
2. Press and hold Shift on your keyboard and select a group further along in the branch. This is the last group in the group that you want to select. All step groups between this one and the previously selected one are highlighted yellow to indicate that they are selected.



Cut, copy, and paste groups

To cut or copy selected step groups in the process map, right-click a group, or a highlighted group of selected step groups, and click **Copy (Ctrl + C)** or **Cut (Ctrl + X)**.

To paste the copied step groups, select the one that you want your copied steps to follow, right-click and click **Paste (Ctrl + V)**.

Alternatively, you can use the following shortcut keys:

- **Ctrl + C** – Copy
- **Ctrl + X** – Cut
- **Ctrl + V** – Paste

Delete groups

To delete selected step groups in the process map, right-click a group, or on a highlighted group of selected step groups, and click **Delete (Del)**. Alternatively, you can press the Delete key on your keyboard.

A dialog displays asking you to confirm the deletion.

Group groups

You can group or ungroup any groups or steps.

To group several step groups together:

1. Select the icon in the top-left corner of all the step groups that you want to group together.
The selected groups display yellow.
2. Right-click one of the selected groups and click **Group**.



Alternatively, you can use the following keyboard shortcut keys:

- **Ctrl + G** – Group

The selected groups now display as a single group.



Ungroup groups

To ungroup, select the grouped group, right-click and select **Ungroup**.

Alternatively, you can use the following keyboard shortcut keys:

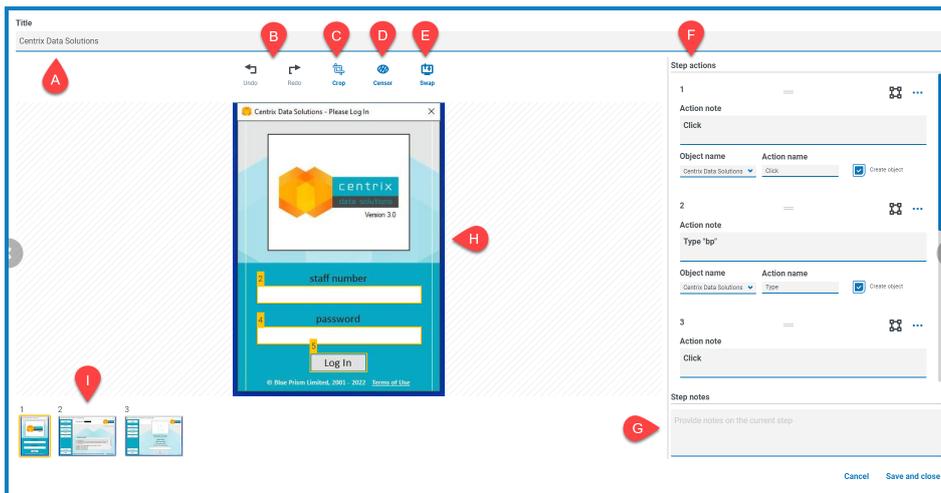
- **Ctrl + U** – Ungroup

Edit steps

Click a group in the process map to open the step editor. Alternatively, the following shortcut keys can be used to open and close the step editor:

- Enter – Opens the selected group.
- Esc – Closes the selected group (without saving any changes).

The step editor window allows you view each step and perform the following actions for each step:



Location	Name	Description
A	Step name	Click the step name to edit it. By default it shows the application being used at the time.
B	Undo/Redo	Undo/redo any edits you make to the screenshot.
C	Crop	Use the crop tool to trim the screenshot.
D	Censor	Obfuscate sections of the screenshot for security.
E	Swap image	Browse to a new image on your computer to replace the current one.
F	Step actions	A sequentially numbered list of fully editable actions that occur in this step. These actions can have associated bounding boxes shown on the screenshot to indicate where interactions were made. If you have enabled Show business objects in the User settings, the step action panel displays a Create object check box and business object fields for defining an application and step action. See Create business objects for more details.
G	Step notes	Add general notes to appear in the PDD.
H	Screenshot	Screenshot captured at the time of these interactions.
I	Thumbnails	Shows steps within this group.

Cut, copy, and paste steps

Using the thumbnails displayed along the bottom of the edit panel you can cut, copy, and paste individual steps within a group of steps. Right-click a step thumbnail and choose the required action. Pasted steps are placed immediately after the highlighted step. Alternatively, the following shortcut keys can be used to copy and paste steps:

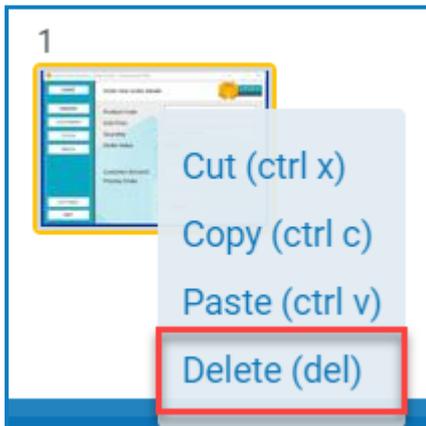
- **Ctrl + C** – Copy
- **Ctrl + X** – Cut
- **Ctrl + V** – Paste



Delete steps

To delete a step in the step editor, right click the step you want to delete and select **Delete**.

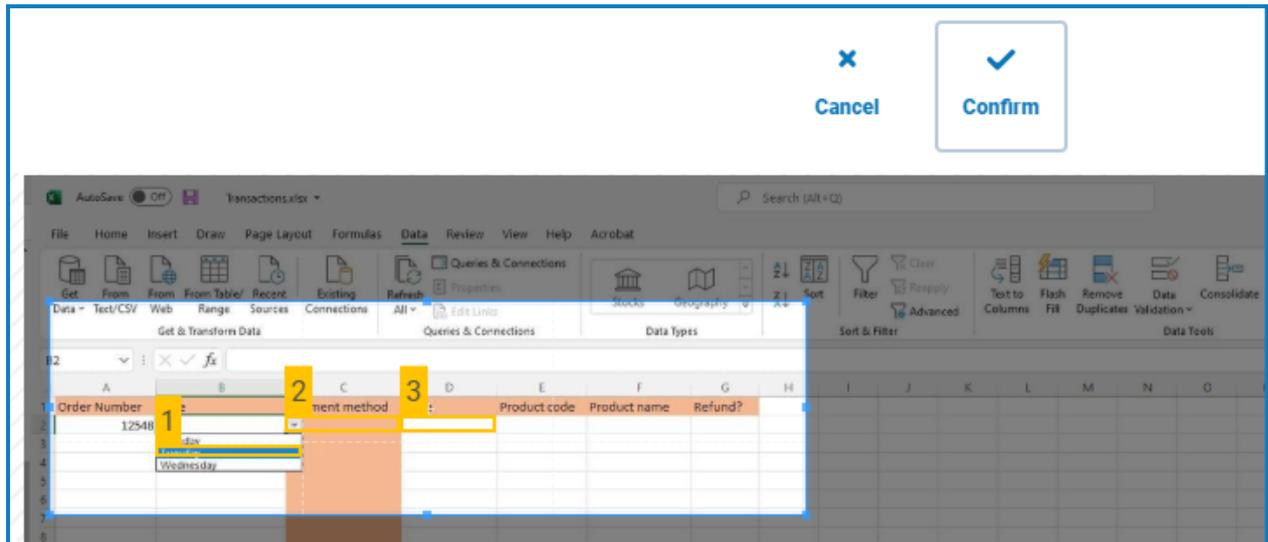
Alternatively, you can press the Delete key on your keyboard.



Crop steps

If required, you can crop the screen shot for each step.

1. Click a step to open it in the step editor.
2. Click the **Crop** icon and adjust the crop area as required.

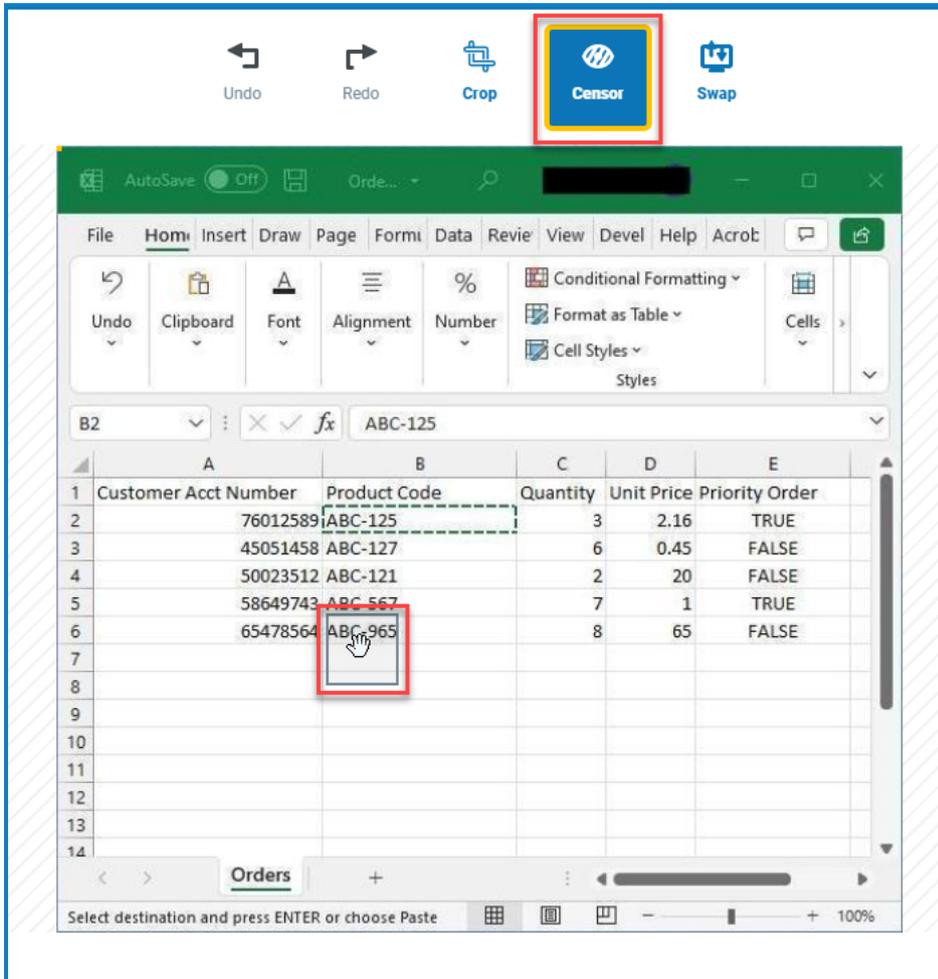


3. After you have made the changes, click **Confirm** to apply the changes, or **Cancel** to discard the changes.

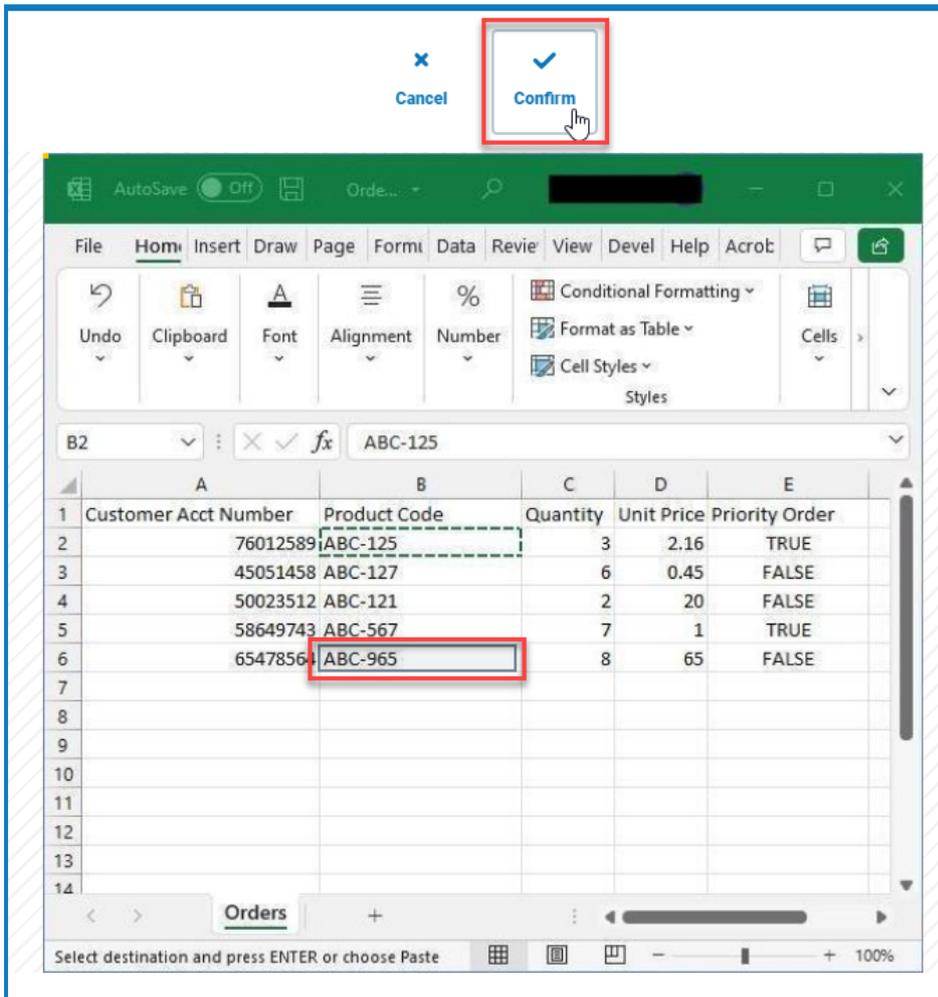
Censor steps

If a screenshot shows potentially sensitive or private information, you can use the censor tool to black it out.

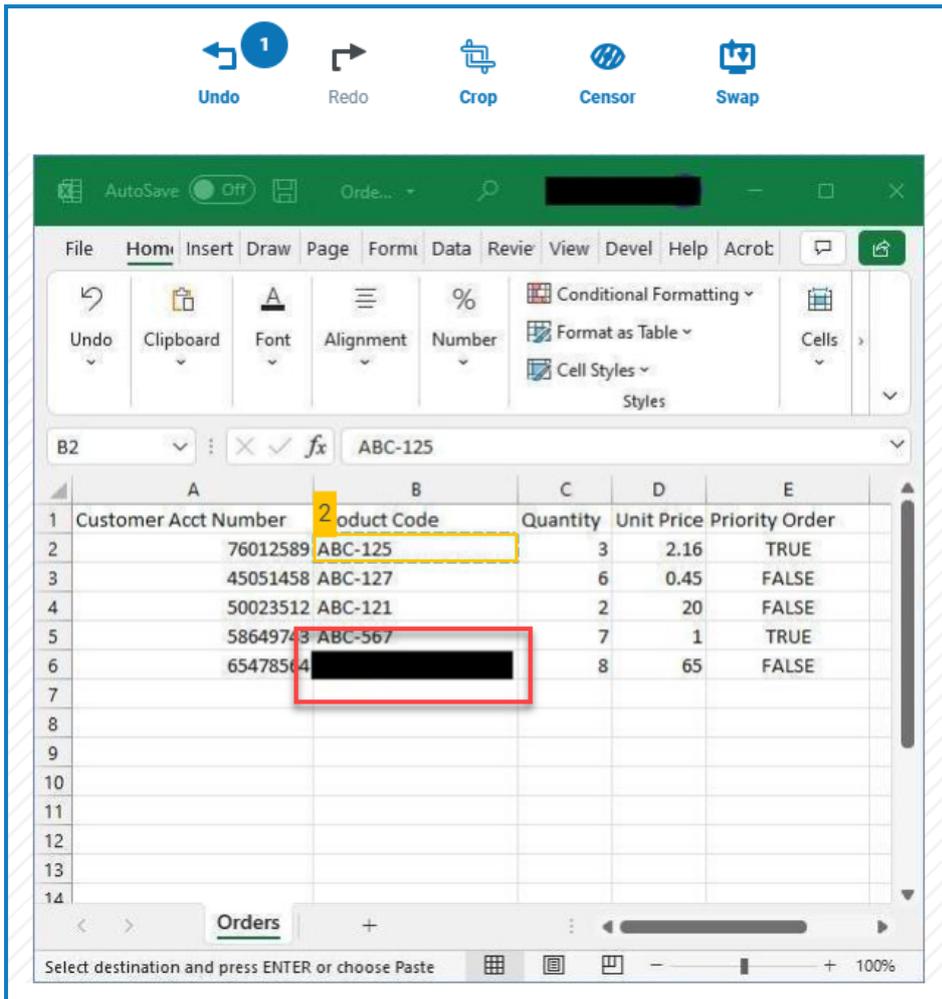
1. Click the censor icon and select the area of the screenshot you want to obfuscate.



2. Resize/reposition it to cover the sensitive area. Once you have the correct placement you can confirm.



The censored area displays black.



Apply bounding boxes

To add a new bounding box to the screenshot:

1. Click the bounding box icon (A) then click the screenshot roughly where you want it to be placed (B).

Step actions

1 Use this to add a bounding box to your screenshot.

Action note

Click on ""D" 2"

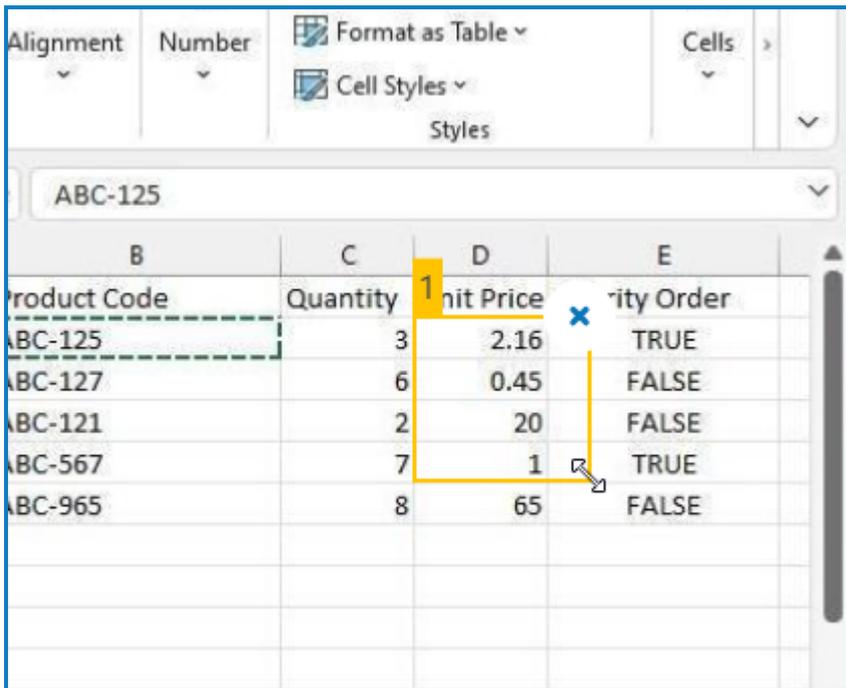


Object name **Action name**

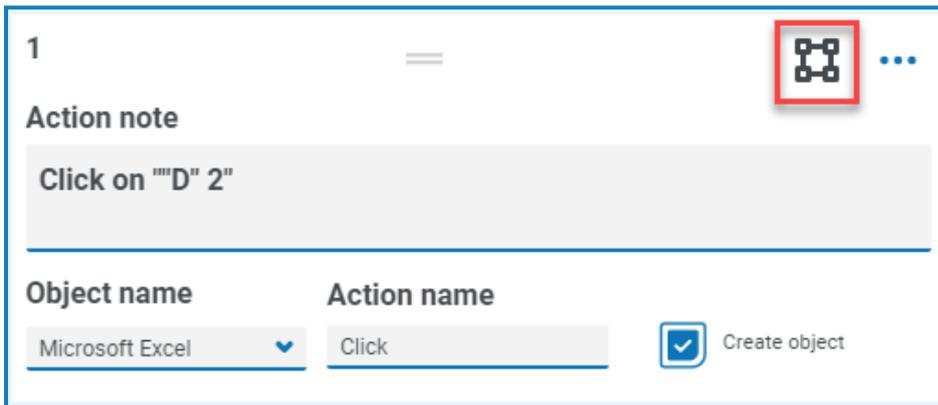
Microsoft Excel Click Create object

	B	C	D	E
	Product Code	Quantity	Unit Price	Priority Order
89	ABC-125	3	2.16	TRUE
58	ABC-127	6	0.45	TRUE
12	ABC-121	2	20	FALSE
43	ABC-567	7	1	TRUE
54	ABC-965	8	65	FALSE

- After you have placed the new bounding box on the screenshot you can reposition and resize it as needed.



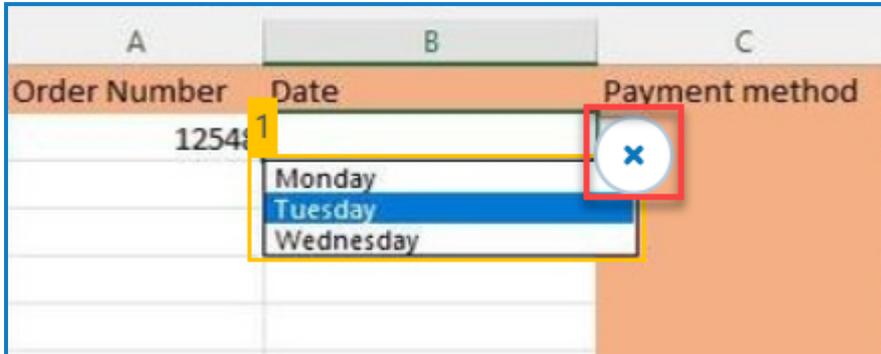
The bounding box icon is now dark gray and the icon has changed indicating the bounding box for that action is being displayed.



Delete bounding boxes

The following options are available when deleting bounding boxes:

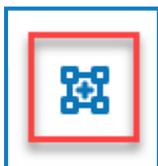
- To delete a bounding box, but not the action, hover the mouse over the box to display the X icon, and click the icon.



- To delete a bounding box and the action, click the ... (ellipsis) icon next to the icon and click **Delete**.

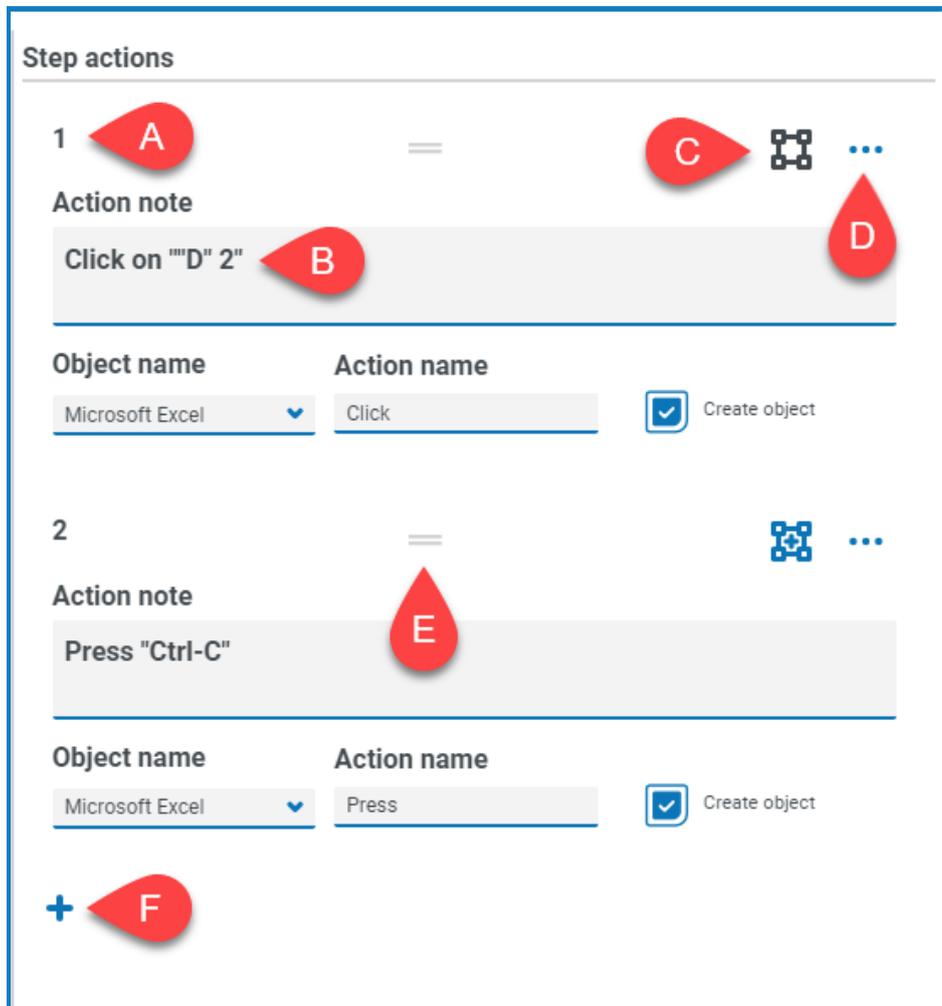


After a bounding box has been deleted, the bounding box icon changes to blue to indicate that it is available for use.



Edit step actions

Step action information displays on the right-hand side of the screen. This is a numbered list of editable actions in the step. These actions can have bounding boxes displayed on the screenshot to indicate where interactions were made.

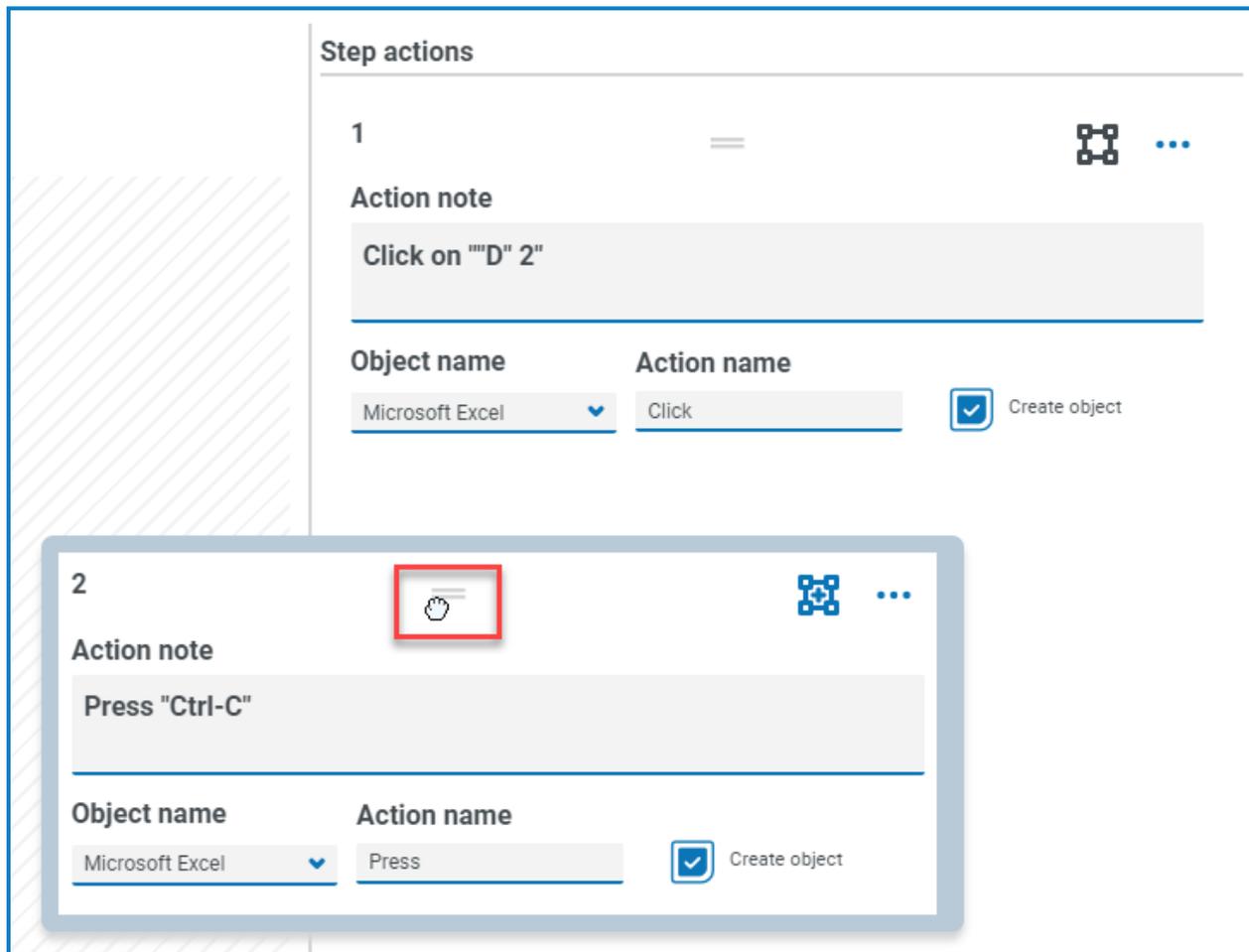


Location	Name	Description
A	Step number	Each action is given a number indicating the order in which the actions occurred.
B	Action note	This editable note briefly describes the step action. The action note is automatically populated if Auto-generate business object fields is selected in the User settings .
C	Bounding box	Each action can have a bounding box displayed on the screenshot to show where the interaction occurred. A gray icon indicates that the action already has a bounding box on the screenshot. You can remove bounding boxes from the screenshot without removing the action.
D	Step menu	You can cut, copy, paste and delete step actions from this menu.

Location	Name	Description
E	Add an action Reorder step actions	More step actions can be added by clicking the + icon. New actions will be added to the bottom of the list. Click and drag to reorder step actions .
F	Add an action	More step actions can be added by clicking the + icon.

Reorder step actions

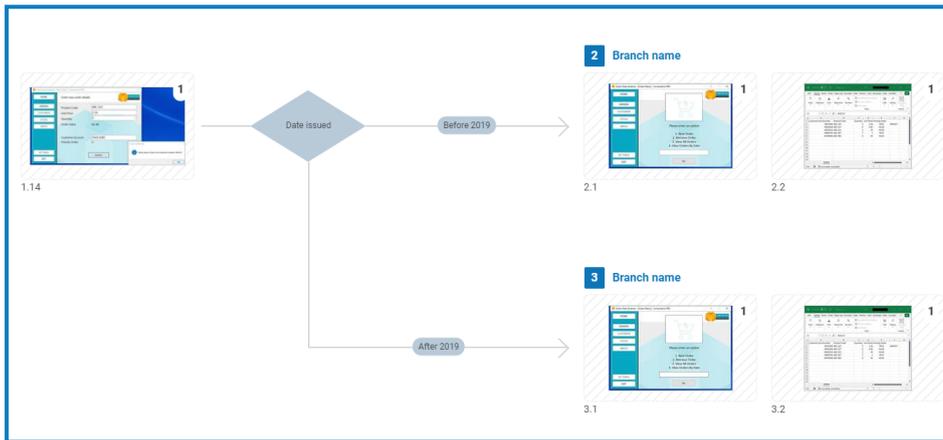
To reorder the step actions for a step, click the reorder icon on the top of the step action tile and drag it to a new position in the list of step actions.



Branches

Branches show the available paths through a process. A branching point is identified by a blue diamond or 'decision point'. From here you can add branches or connections.

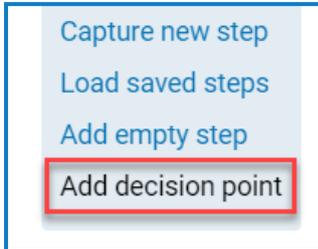
 Up to a maximum of 15 choices per decision point are supported by ALM. You can import JSON files into ALM to create a process definition document. For more information, see [ALM-Process definitions](#).



Create a branch (Add decision point)

To create a branch:

1. Add a decision point by right-clicking on a group and selecting **Add decision point**. The decision point is added directly after this group.



2. Right-click the decision diamond to display the shortcut menu and select from the following options in the shortcut menu:
 - **Edit** – Edit the text within the diamond and each condition point.

Edit decision

Decision name
Decision

Branch name
condition 1

Branch name
condition 2

Branch name
condition 3

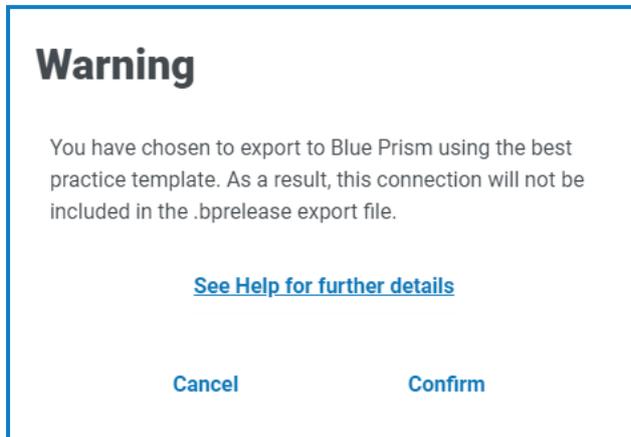
This connection will be excluded from the .bprelease export. See Help for more details.

 If the best practice template is enabled in the User settings, a warning displays for any connection that will not be included in the BPRELEASE export file. For more information, see [Understanding the best practice template](#).

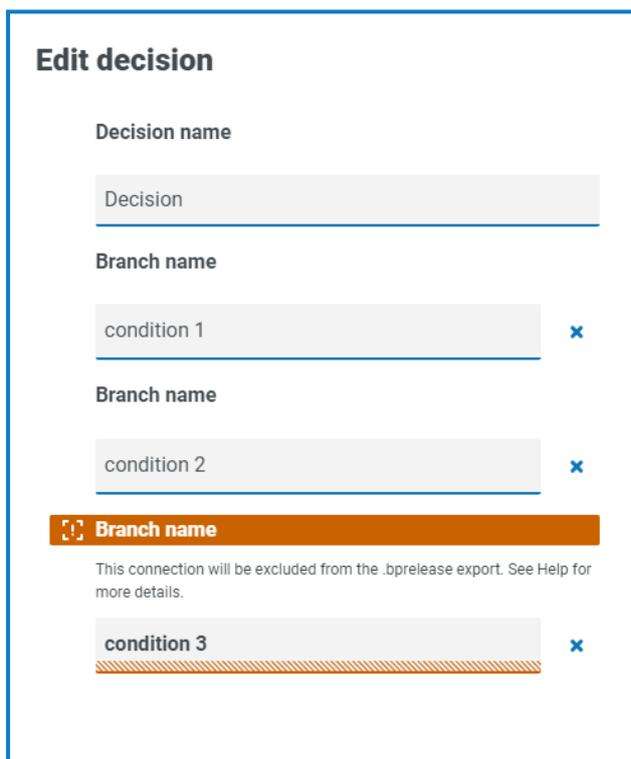
- **Capture new branch** – Capture a new process and insert it as a new branch.
- **Load saved branch** – Add pre-saved captures to a branch.
- **Add empty branch** – Add a branch as a placeholder that can be added to later. This enables you to create the skeleton of a process without adding detail all at once.
- **Add connection** – Enables you to connect this step to an existing step in the process.

Create a branch with best practice template applied

If **Apply best practices to .bprelease export** is enabled in the [User settings](#), you must only connect a decision point to the first group in a branch. If you attempt to connect a decision point to any other group in the branch, a warning displays. If you decide to proceed, the connection is not included in the BPRELEASE export file.



Any connections that do not adhere to the best practices set by the process template are displayed in orange on the main process screen. A warning is displayed in the Edit decision dialog for any connections that will not be included in the BPRELEASE export file.

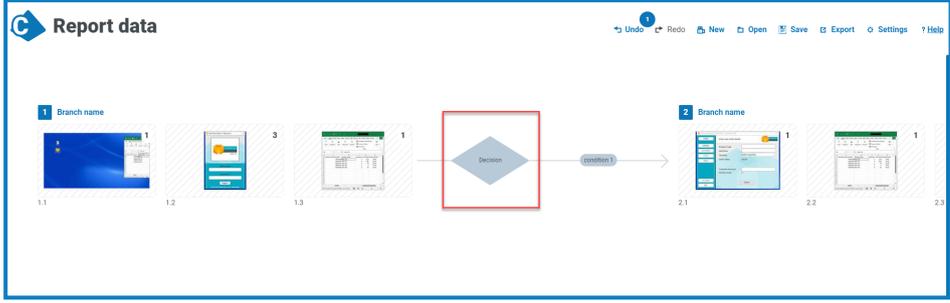
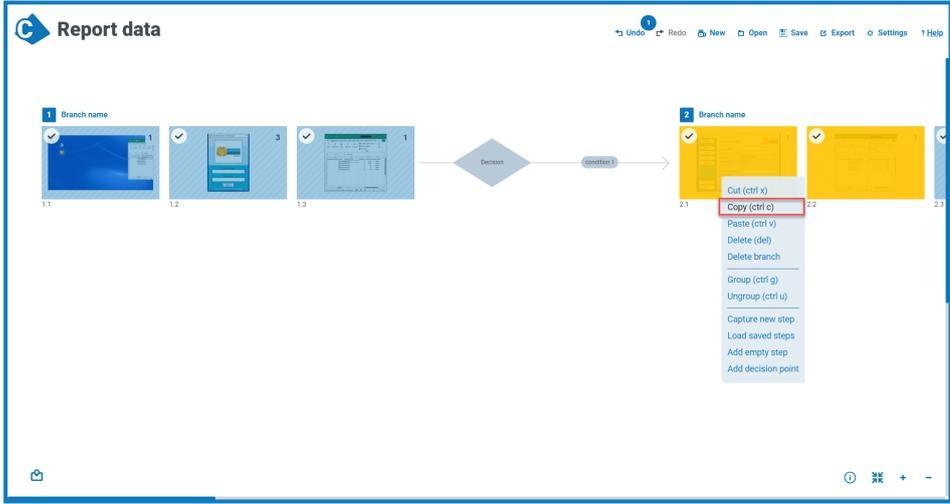
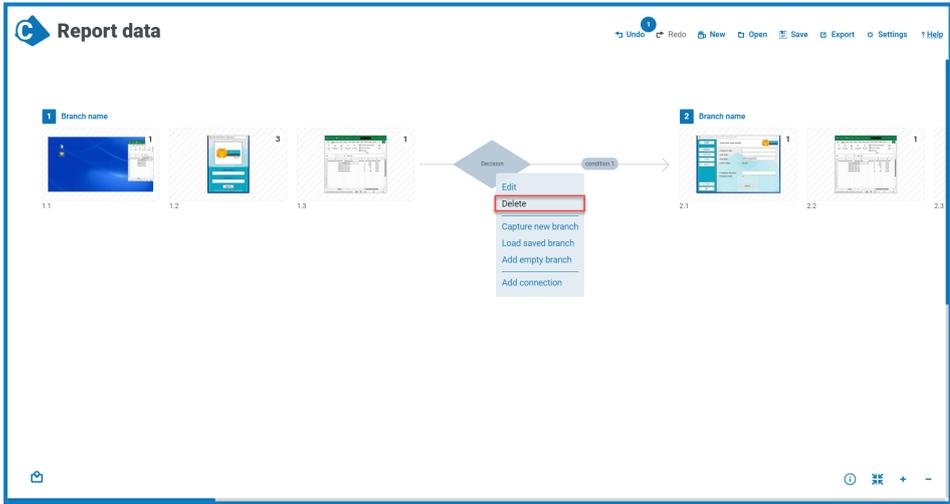


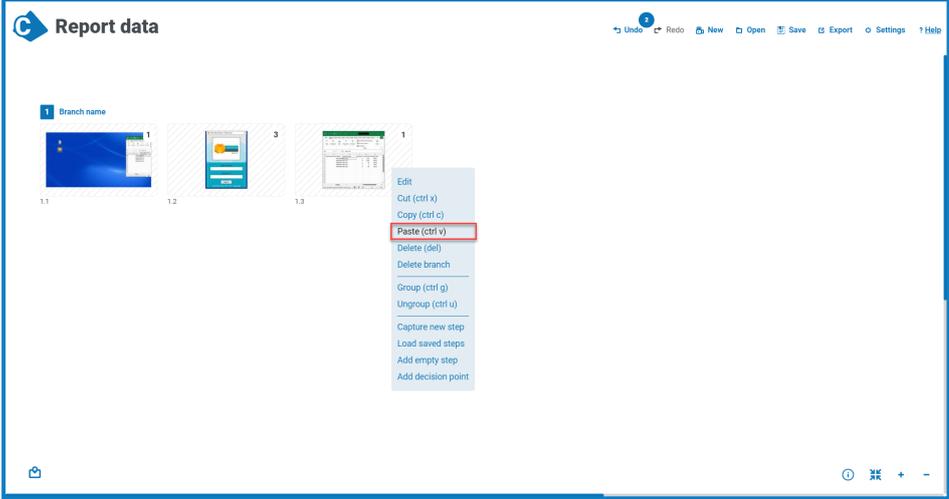
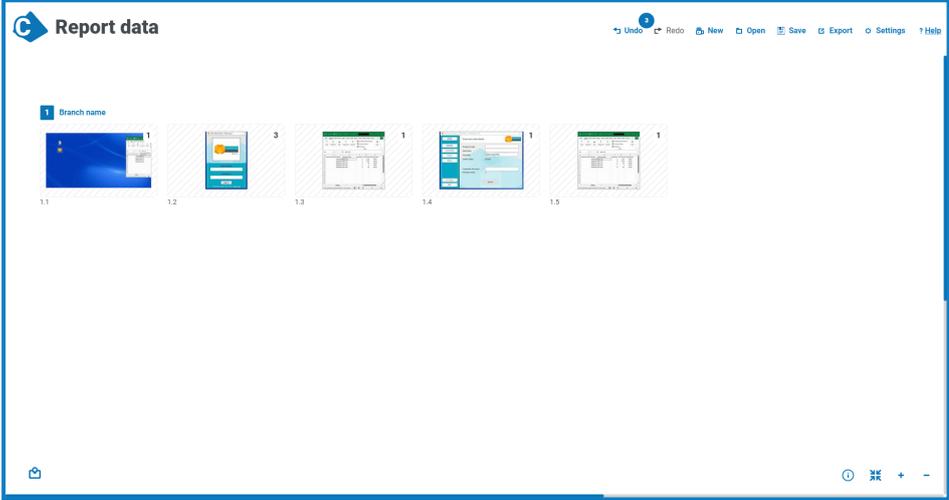
For more information, see [The Blue Prism best practice process template](#).

Delete a decision point

Deleting a decision point also deletes all branches and connections coming from that decision point. If you want to keep a branch you will need to use the **Cut**, **Copy**, and **Paste** options to move the branches before deleting the decision point.

In this example we need to delete a decision point we added by mistake, but we don't want to lose any of the grouped steps to the right of the decision point.

<p>Step 1</p>	<p>This branch shows the unwanted decision point and the other grouped steps to the right.</p>	 <p>The screenshot shows a workflow titled 'Report data'. It consists of two branches. Branch 1 (left) contains three steps: 1.1, 1.2, and 1.3. Branch 2 (right) contains three steps: 2.1, 2.2, and 2.3. A decision point is located between the two branches, and it is highlighted with a red rectangular box. A 'connection' link connects the decision point to the start of branch 2.</p>
<p>Step 2</p>	<p>Cut or copy all the grouped steps you want to keep. Select them all and select Cut (ctrl x) or Copy (ctrl c) from the shortcut menu, or use the shortcut keys.</p>	 <p>The screenshot shows the same workflow as in Step 1. The steps in branch 2 (2.1, 2.2, 2.3) are highlighted in yellow. A context menu is open over these steps, with the 'Copy (ctrl c)' option selected and highlighted by a red box. Other options in the menu include Cut (ctrl x), Paste (ctrl v), Delete (del), Delete branch, Group (ctrl g), Ungroup (ctrl u), Capture new step, Load saved steps, Add empty step, and Add decision point.</p>
<p>Step 3</p>	<p>Right-click the decision point and click Delete (del) or press the Delete key on your keyboard. You will see a warning about all connected branches being deleted. Click Delete</p>	 <p>The screenshot shows the same workflow. The decision point is now highlighted with a red box, and a context menu is open over it. The 'Delete' option is selected and highlighted by a red box. Other options in the menu include Edit, Capture new branch, Load saved branch, Add empty branch, and Add connection.</p>

<p>Step 4</p> <p>With the decision point now deleted, right-click the last group and click Paste (ctrl v), or use the shortcut keys.</p>	
<p>Step 5</p> <p>The branch is restored to how it was before the decision point was added.</p>	

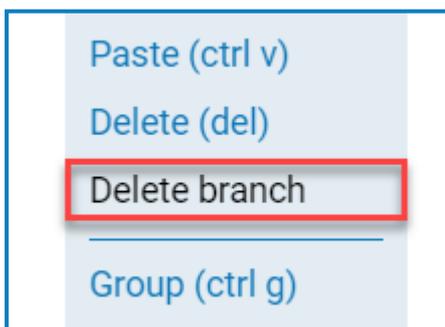
Delete a branch

If you delete a branch, any other branches that are connected to it are also deleted. If you delete the first branch of a process, a warning message displays.

There are two ways to delete a whole branch.

Option 1 – Right-click any step in the branch you want to delete and click **Delete branch** (or press the Delete key).

A warning displays asking you to confirm that you want to delete the selected branch. Any branches connected to the selected branch will also be deleted.



Option 2 – Open the Edit decision dialog and click the **X** next to the branch you want to delete.

Edit decision

Decision name

Decision

Branch name

condition 1

X

Create business objects

You can link each application in a process to an automatically generated business object. Win32 and UIA are spied for each element that the user interacts with. When you create a business object for an application, it contains information about the application elements that you have interacted with in the recorded process.

If enabled, when you export the BPRELEASE file and import it into Blue Prism, all the information contained in each business object is used to automatically populate the Application Modeller to save you time when spying elements. For more information see [Application Modeller spying](#).

The **Show business objects** setting must be enabled to create business objects.

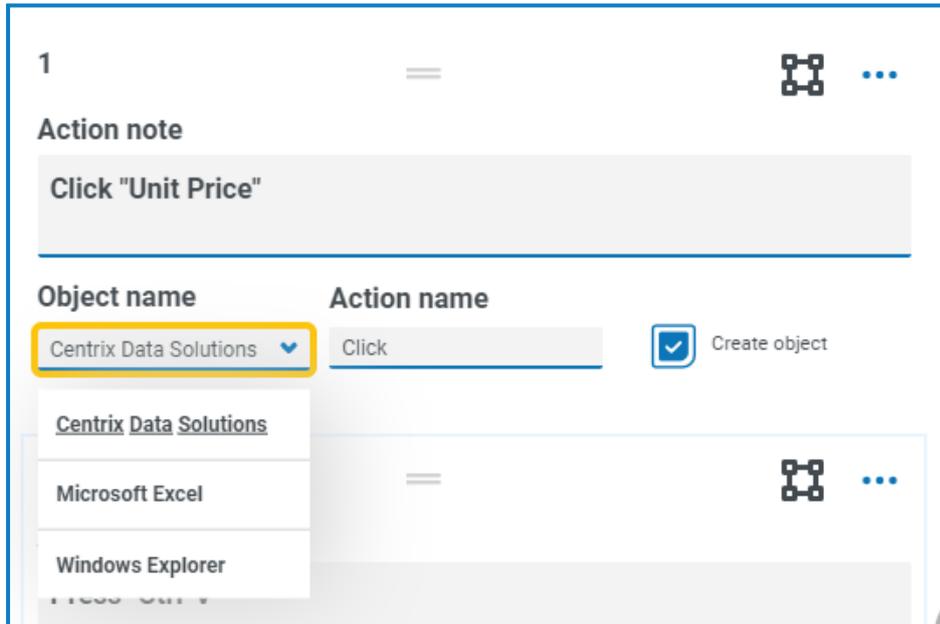
To enable the business object function:

1. Click **Settings**.
2. Click **Business objects** and select the **Show business objects** check box.

Once enabled in the User settings, the **Object name** fields, **Action name** fields, and **Create object** check boxes required to create business objects display in the Step actions panel.

To create a new business object:

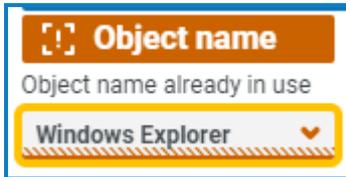
1. Open a step in edit mode by either clicking on the step thumbnail, or by right-clicking the thumbnail and selecting **Edit**.
2. Enter a name in the **Object name** field on the Step actions panel. This is typically an application or element to attach to the new business object. When you start to type, any pre-existing objects display in the drop-down list for quick selection.



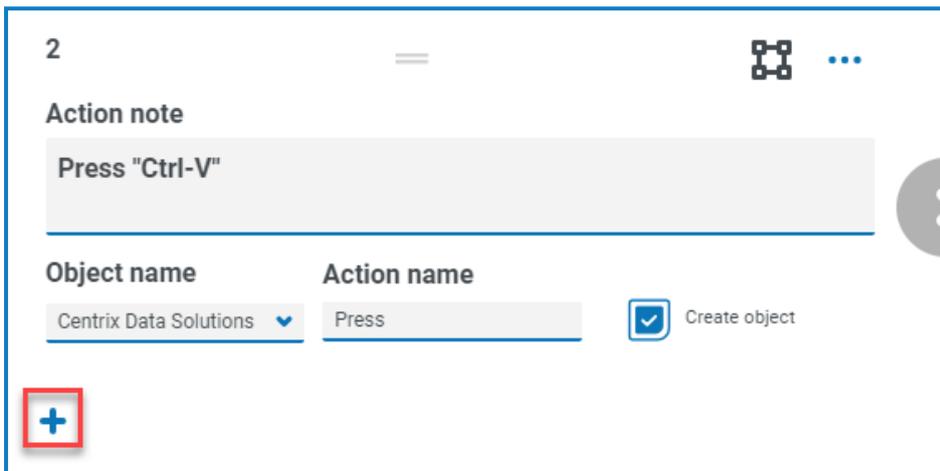
3. Enter a name in the **Action name** field on the Step actions panel, such as click or double-click.

- Click the **Create object** check box in the Step actions panel. The **Create object** check box is disabled until you define the object and action names.

 You cannot attach more than one application to a business object. If a business object already exists with the same object name, the object name field displays in red.



- To create additional business objects for the step, click the plus symbol in the Step actions panel.



- When you have finished creating business objects for the step, click **Close** and then **Save**.

 If **Auto-generate business object fields** has been enabled in the User settings, the business object fields will be automatically populated for any new Capture processes.

Add step actions to an existing business object

To add additional step actions to an existing business object:

- Click the **Object name** field in the Step actions panel to define the object name and type an application or element name that has already been created. When you start to type, any pre-existing objects display in the drop-down list for quick selection.
- Type an action name into the **Action name** field in the Step actions panel, such as click or double-click.
- Leave the **Create object** check box unselected. If a business object already exists that matches the object name you have defined, the step action is added to the existing business object.

Application Modeller spying

When enabled in the Capture [User settings](#), Application Modeller attribute information is gathered for **Win32** and **UIA** spy modes for every application element interacted with during capturing. This information is captured for every action performed during a Capture recording, such as typing and clicking, and optionally included in an auto-generated business object.

When you import the BPRELEASE file into Blue Prism, the spied data automatically populates the element attribute fields in Application Modeller.

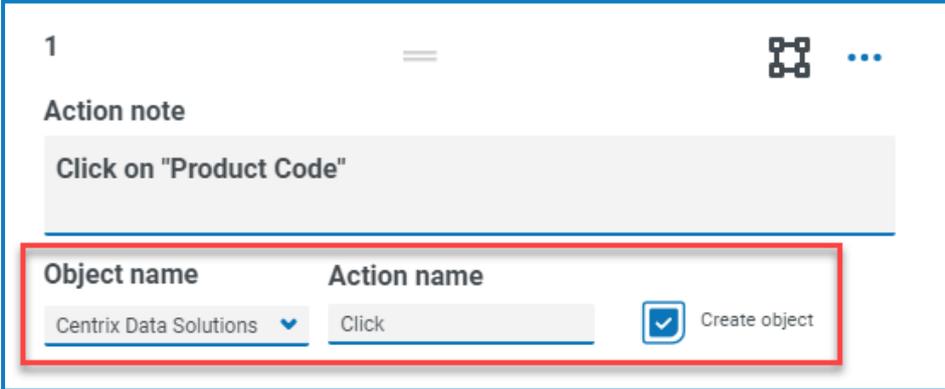
Include data in auto-generated business object

To include Application Modeller attribute information in your auto-generated business object:

1. In the **Business objects** tab of the Capture [User settings](#), ensure the following check boxes are selected:
 - **Show business objects**
 - **Enable Blue Prism Application Modeller Spying**

 You can optionally select **Auto-generate business object fields** if you want all Step action fields to be automatically populated and all **Create objects** check boxes selected.

2. [Capture a process](#) where you interact with an application.
3. [Open a step](#) that contains a screenshot of the application and check that the Step action **object name** and **action name** fields are populated. and that the **Create object** check box is selected.



The screenshot shows a step action configuration window. At the top, there is a step number '1', an equals sign, and a grid icon with three dots. Below this is the 'Action note' field, which contains the text 'Click on "Product Code"'. Underneath the action note is a table with two columns: 'Object name' and 'Action name'. The 'Object name' field has a dropdown menu showing 'Centrix Data Solutions'. The 'Action name' field contains the text 'Click'. To the right of the 'Action name' field is a checked checkbox labeled 'Create object'.

 If you did not enable **Auto-generate business object fields** in the user settings, you will need to complete these fields manually.

4. Click **Save** and **Close**.
5. Click **Export**, select the **Blue Prism release (.bprelease)** check box and click **Export**. For more information, see [Export a process](#).

 The Application Modeller data is only included in the export file if you select the **Create object** check box for each step action you want to include the data for. If you want to export all of the Application Modeller data for a process, select the **Auto-generate business object fields** check box in the user settings before creating the Capture recording or manually select the **Create object** check box for every step action.

Automatically populate Application Modeller

The following instructions show you how to take advantage of Application Modeller spying to save time when spying elements:

1. Import the **BPRELEASE** file into Blue Prism.
2. See [Import objects into Blue Prism](#) to view and edit your imported business objects.
3. Click the **Studio** tab in Blue Prism and open the imported Capture process.

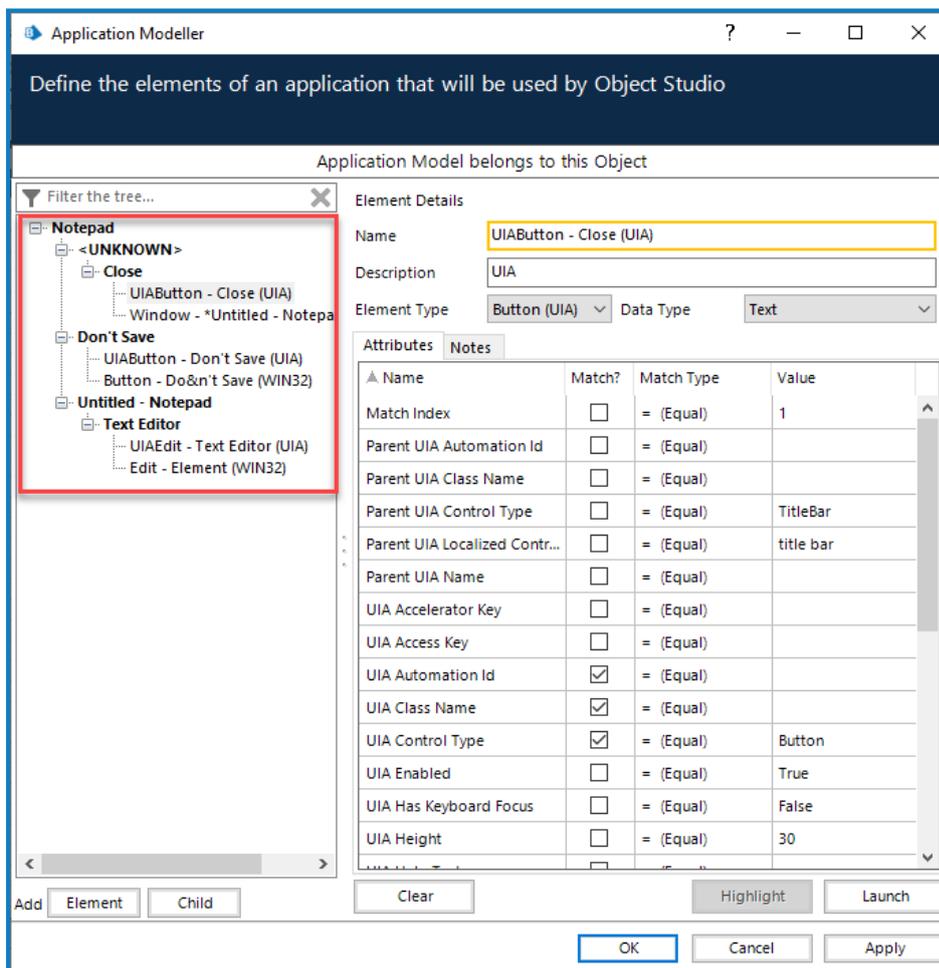
 The Capture process is stored in a group **Capture** folder in the **Processes** section of the Studio tree. The Capture business object is stored in a group **Capture** folder in the **Objects** section of the Studio tree. If these folders do not already exist, they are created for you on import.

4. In Process Studio, click the sub-page tab for the application interacted with in the Capture recording.
5. Right-click a step that is linked to a Capture business object and select **View action in Object Studio**.
6. In Object Studio, click **Application Modeller**.

In Application Modeller, the **Application Name** and application filepath fields are populated with data from Capture.

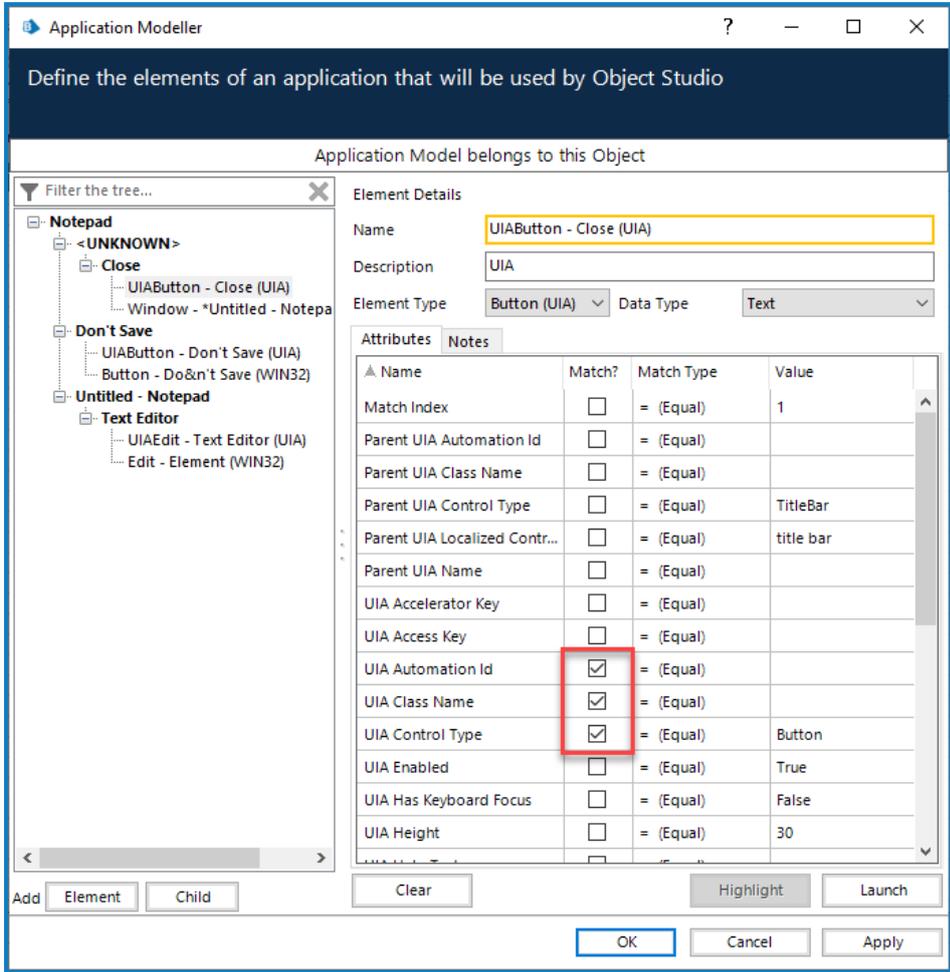
7. Click **Launch** to check that the application filepath is correct.

The elements that have been spied by Capture display in the element tree.



8. Select an element from the element tree.

A pane displays containing the details for the selected element, with the **Name** and **Description** fields populated with the Capture data. The attributes selected in the **Match?** column are the same as the Blue Prism defaults for Win32 and UIA.



9. Click **Highlight** to confirm that the correct element has been spied.

The application will open with a red border around the selected element. For more information about Application Modeller, see the [Blue Prism online help](#).

Teams sharing

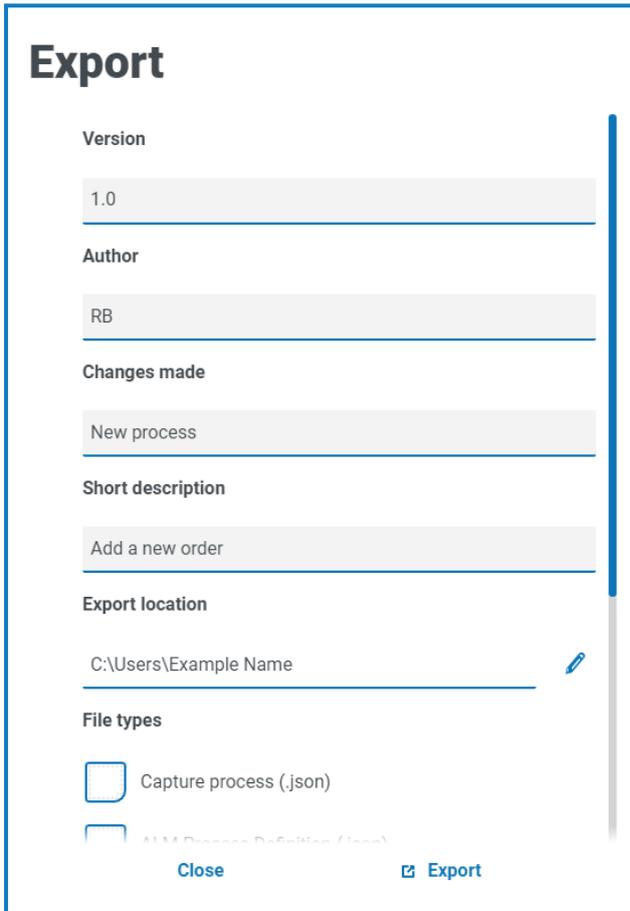
Capture users can utilize the **Request control** feature on Microsoft Teams for collaboration on a process. For this to be possible, the user capturing the process must have Capture installed on their machine. Once installed, both participants of the call can interact with Capture.

Export a process

When you are happy with your process you can export it in a variety of formats:

1. Click **Export** and select the required settings.
2. Use the text fields to define the version, author, changes made, and a enter a short description. All of these will be included in the exported documents.

 If you have exported the process before, the text fields will be populated with the information entered during the previous export.



3. You can change the destination of the export file. To edit the export location, click the pencil icon next to the **Export location** field and browse to a new location.

You must select a valid folder on your local machine. If the destination folder has been moved or deleted, a warning displays.

4. Select the file format from the following file types:
 - **Capture process (.json)** – Generates a JSON file.
 - **ALM Process definition (.json)** – Generates a JSON file that can be imported into Automation Lifecycle Management (ALM) to quickly create Process Definition Documents. See [ALM- Process definitions](#).

- **Process Definition Document (.docx)** – Generates a Word Docx file giving a complete, detailed overview of the process.
- **Blue Prism release (.bprelease)** – Generates a skeleton of the process (and auto-generated business objects) in XML format, which can be imported into Blue Prism (v6.4 or newer).
- **Blue Prism business objects only (.bprelease)** – Generates a JSON file containing business objects only. When imported into Blue Prism, business objects are automatically placed in a new Capture folder in the Studio tab navigation tree. This option is only available when **Show business objects** is enabled in the Capture [User settings](#).
- **Process map (.pdf)** – Generates a PDF showing just a visual of the process map. This map reflects how the process displays in Capture.
- **Process map (.vsdx) Visio** – Generates a Visio file showing just a visual of the process map. This map reflects how the process displays in Capture. You must have Microsoft Visio installed to use this export option.

5. Click **Export**.

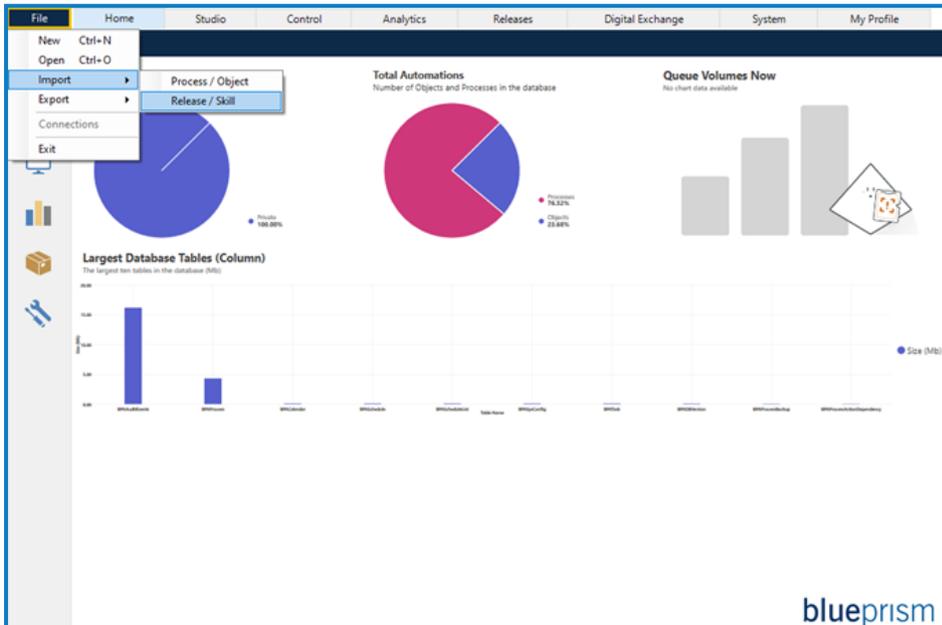
All exported files can be found in the defined export location.

Import a BPRELEASE file into Blue Prism

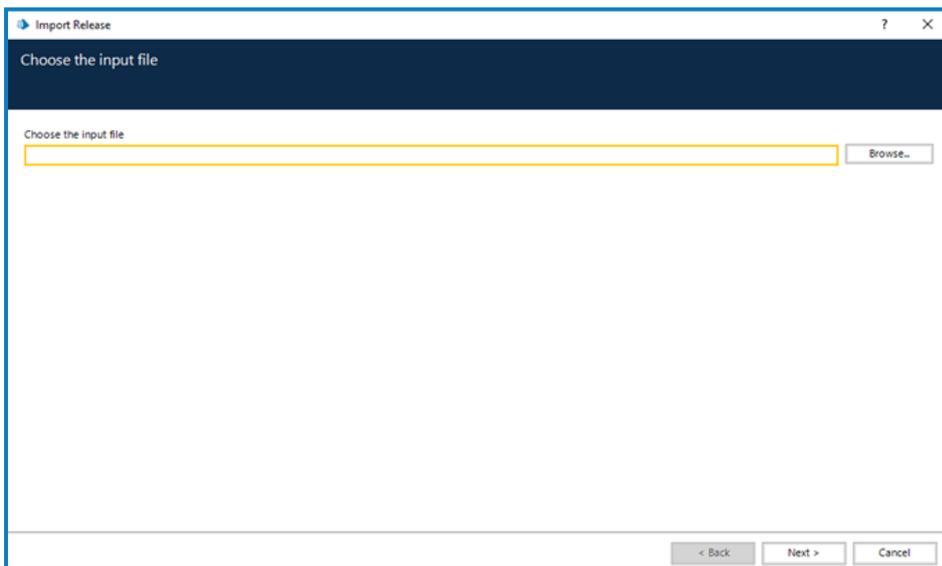
To import a BPRELEASE file created in Capture to Blue Prism:

1. Log into Blue Prism.
2. From the **File** menu, select **Import > Release/Skill**.

The Import Release screen displays.



3. Click **Browse** and navigate to the process you want to import and click **Open**.



4. On the Choose the input file(s) screen, click **Next**.
5. On the Resolve Import Conflicts screen, resolve any conflicts and click **Next**.
6. On the Logging Overview screen, click **Next**. Note that you may need to resolve potential import conflicts here.
7. Once the file has been imported into the database, click **Next**.

Open a process in Blue Prism

To open the imported process in Blue Prism:

1. In Blue Prism, click the **Studio** tab.
2. Click the **Capture** folder in the Processes tree and double-click the imported process.

Open an object in Blue Prism

To open the imported object in Blue Prism:

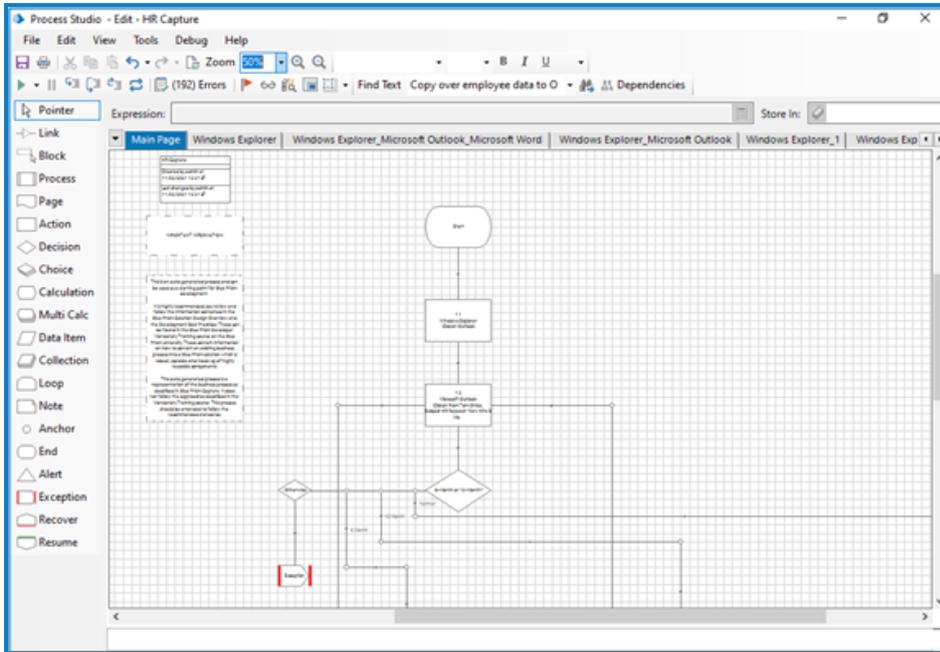
1. In Blue Prism, click the **Studio** tab.
2. Click the **Capture** folder in the Objects tree and double-click the imported object.

See Blue Prism process layout overview on the next page for details of how the process elements created in Capture correspond to Blue Prism.

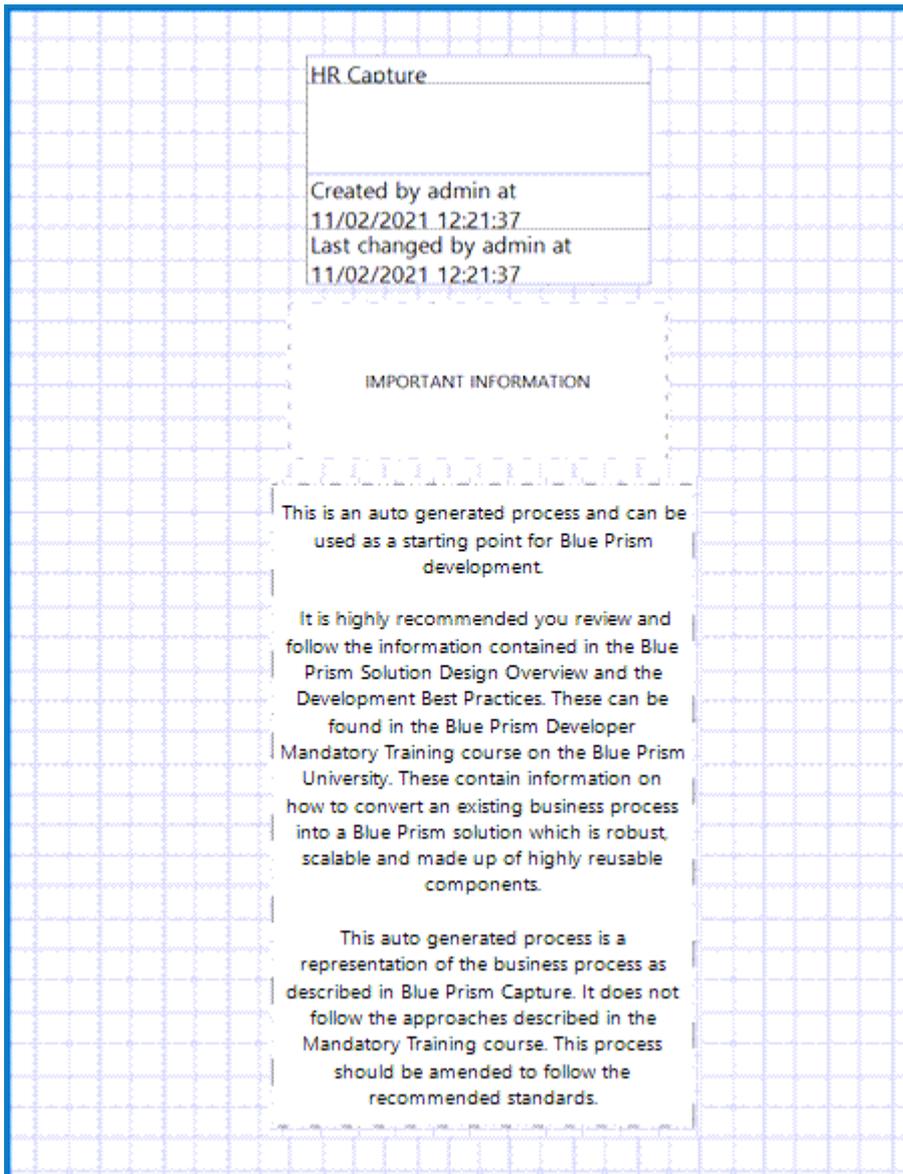
Blue Prism process layout overview

This section explains how the elements added to a process created in Capture correspond to Blue Prism elements once imported.

1. Below is an example of the process Main Page.

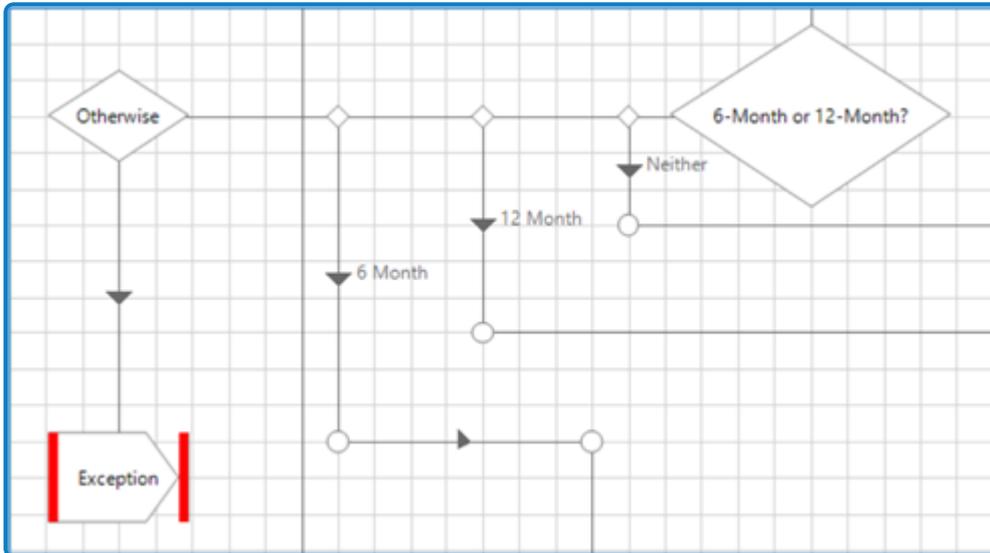


- Note the disclaimer below the information block on the main page of your process.

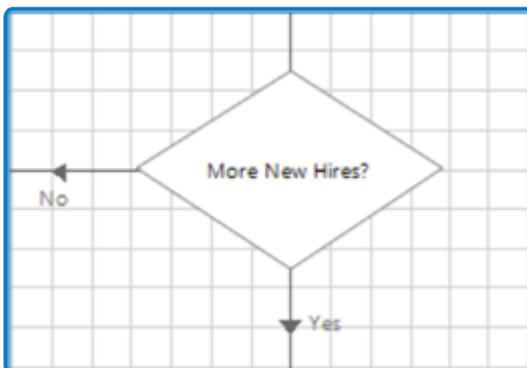


3. Where a decision point has been included in the capture, how it appears in Blue Prism depends on the logic used.

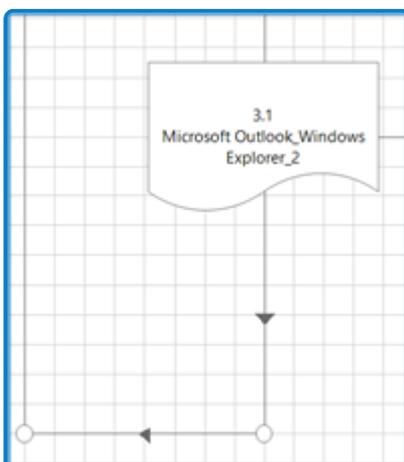
- A decision point with three or more connections will become a choice node with a floating Otherwise node. An exception node is added to the floating Otherwise node.



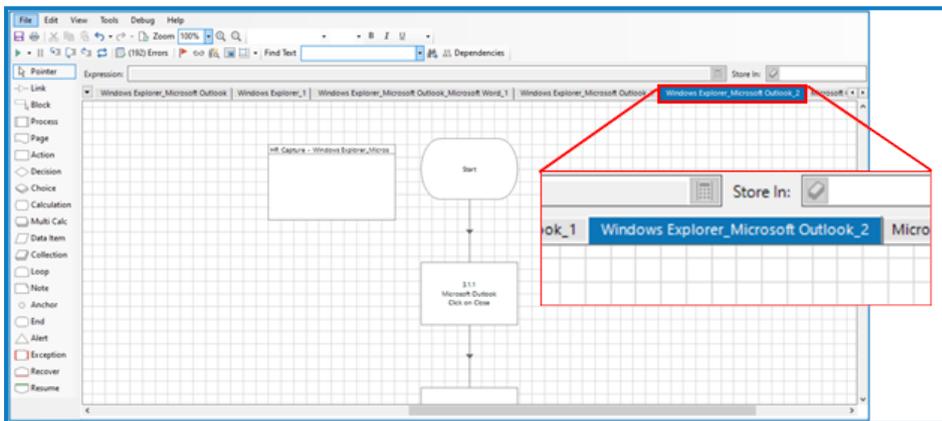
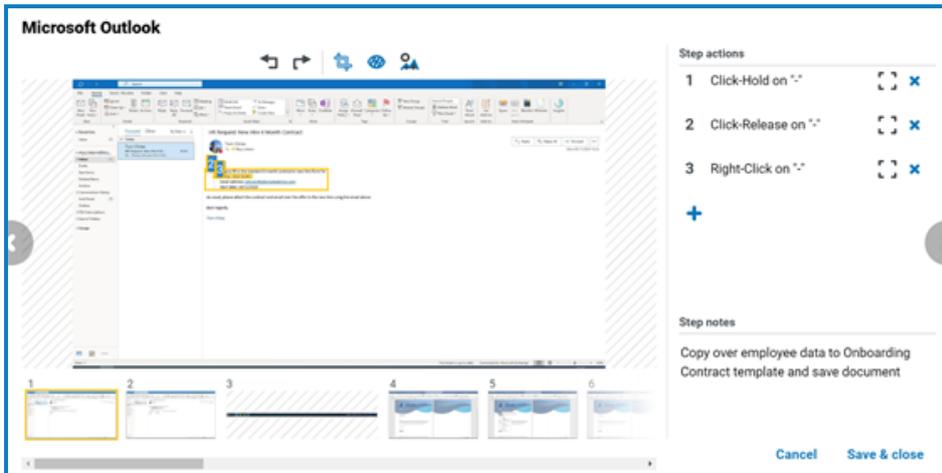
- A decision point with two connections will remain as a decision node. The connection will be overwritten with Yes / No to align with decision node logic in Process Studio.



- A single connection will become a link.

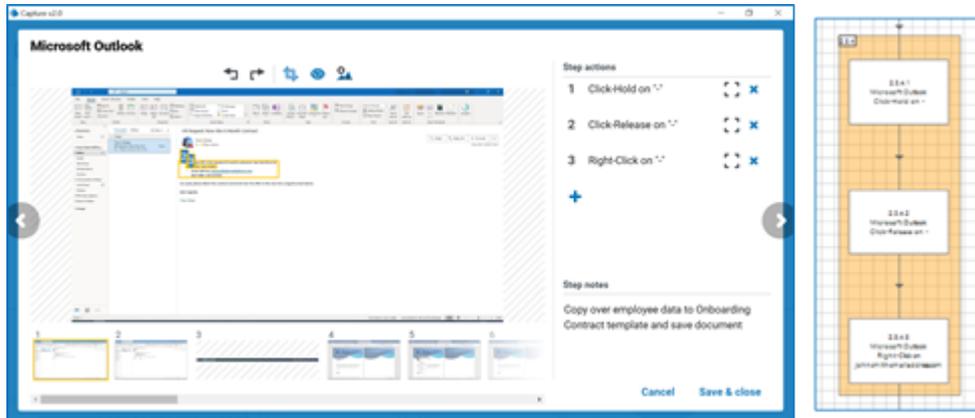


- Groups that have been created in Capture are represented as separate pages in Blue Prism. The page name is auto-generated from the application used (Outlook, Excel, etc).

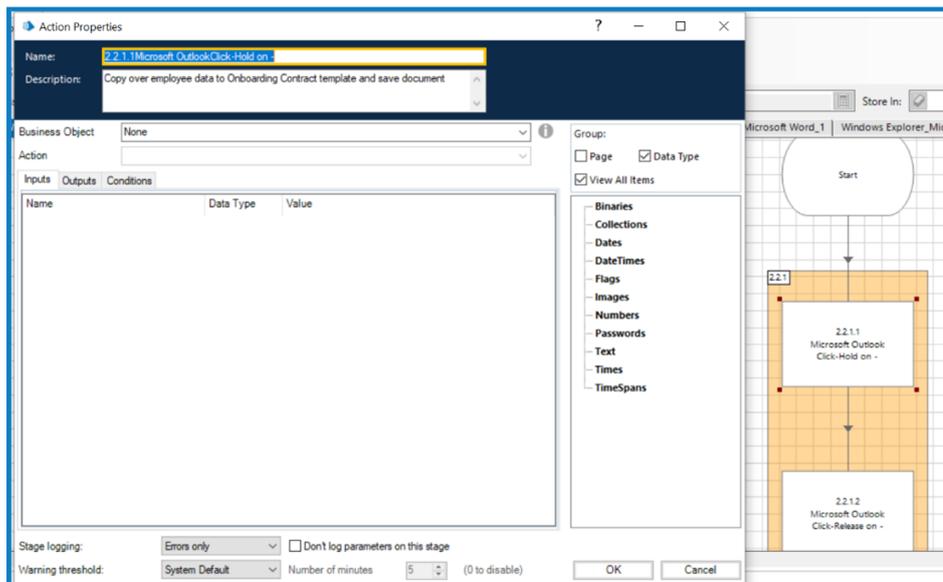
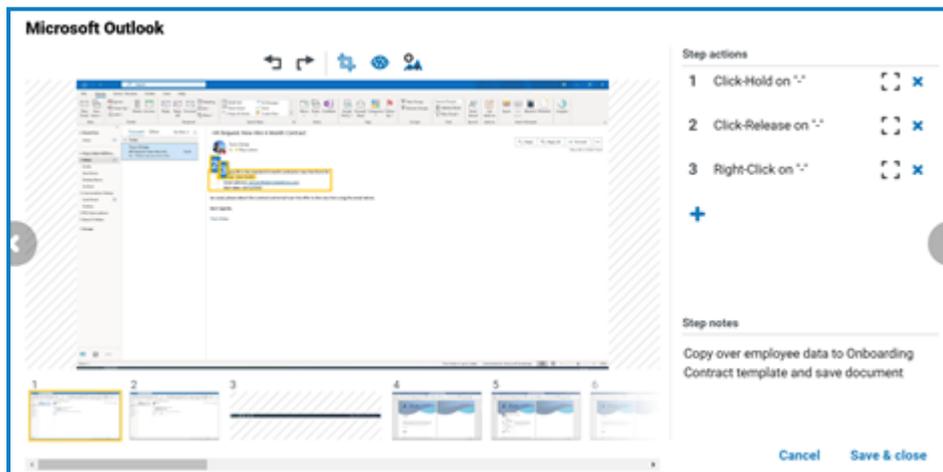


5. In Capture, steps that have more than one step action have been separated in Blue Prism into individual action nodes.

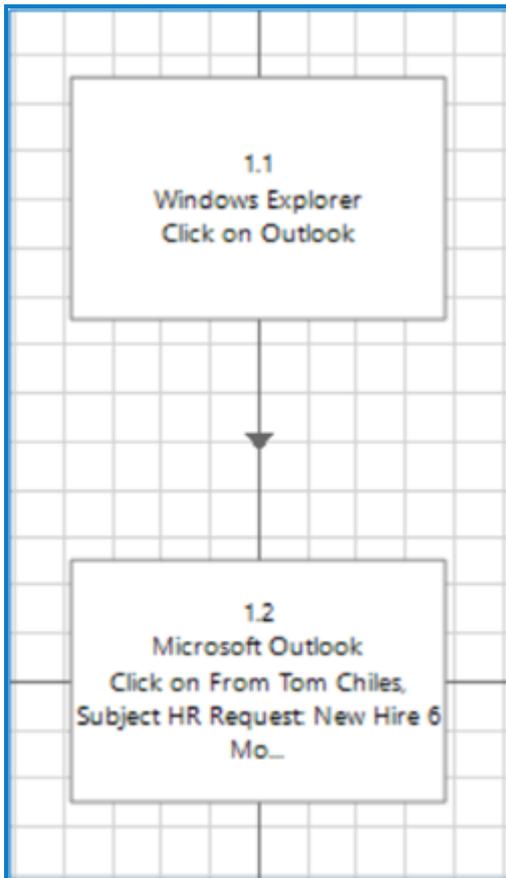
- Separated step actions are grouped together with a block in Blue Prism.



- Step notes written in Capture are carried over into Blue Prism. These can be located in the description field in the Action Properties of each action node in the block.



- Note that the Action nodes have been numbered in Blue Prism. This allows you to track the process as we step through it in conjunction with the PDD.



Branch 1: Open HR Request
Group 1 / Windows Explorer
Step 1 / Action 1: Click on "Outlook"

Bird's eye view:

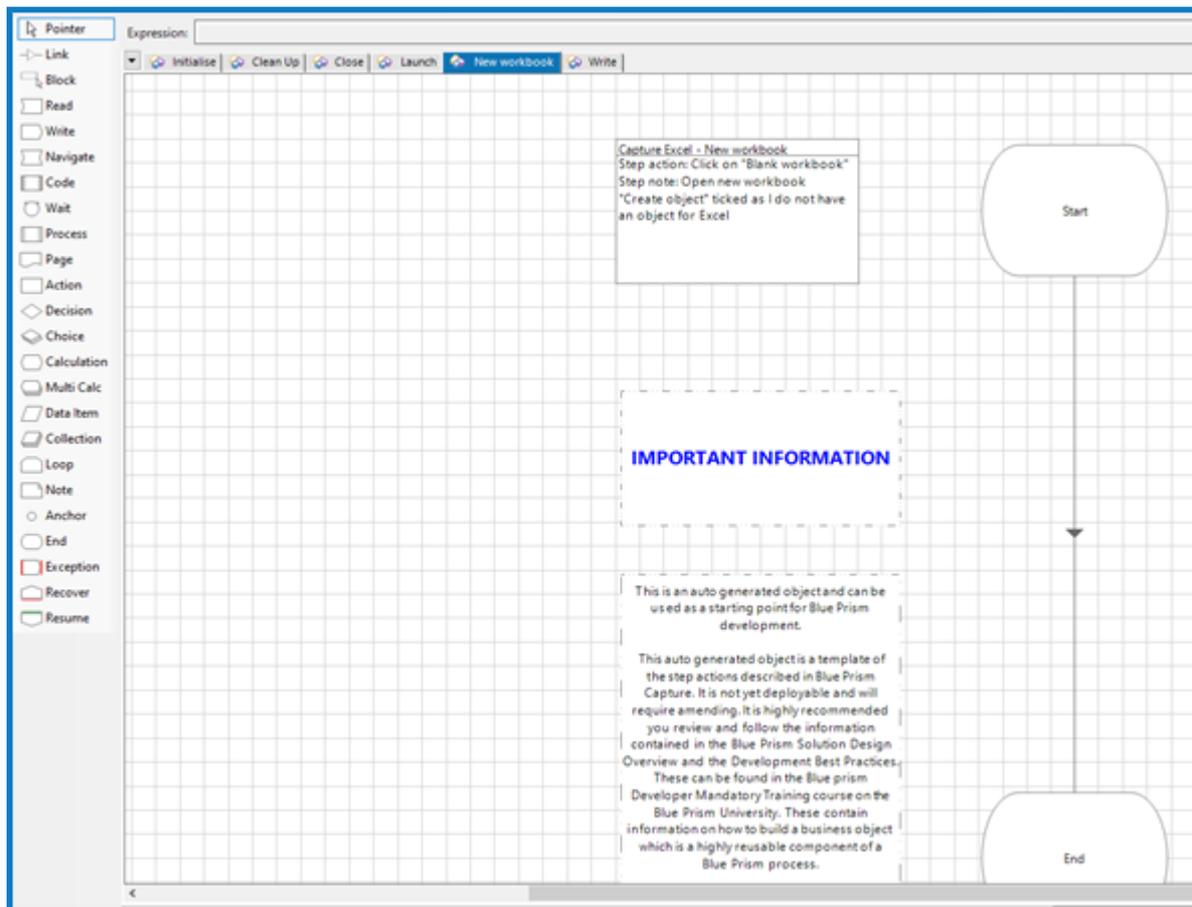
Step Notes:
 Open Outlook

Import objects into Blue Prism

After importing your BPRELEASE file from Capture, you will be able to open any auto-generated objects (if selected in step editor) in Blue Prism.

Auto-generated objects are a starting point for Blue Prism development and will require amending.

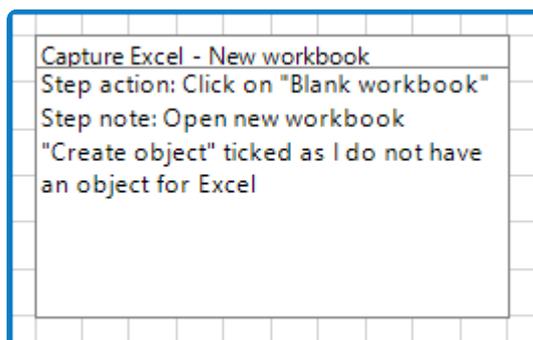
 If you have Application Modeller spying enabled, see [Automatically populate Application Modeller](#) to view and edit the imported Application Modeller information.



Actions assigned to the same object name will be added as sub pages of the auto-generated object.



Step notes and step action details will be included in the auto-generated object for the related step action.

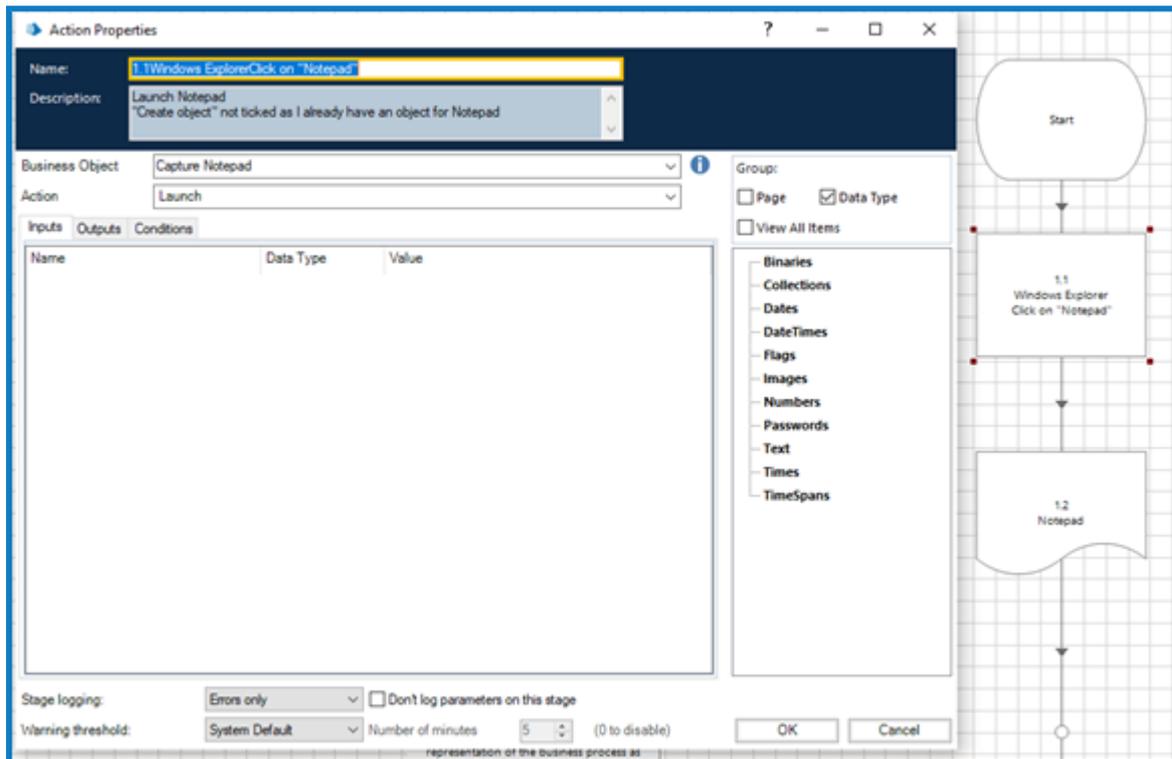


Linking Capture steps to Business Objects

For step actions that have been assigned an object, an action will be linked to the object in your object library. If you have selected to create an object, this will be linked to the newly auto-generated business object.

To link Capture steps to Business Objects:

1. After importing your BPRELEASE file from Capture, open the process in process studio.
2. Step actions will be linked to the object and action name.



3. Make any changes, as required.

Step numbering in Capture

In order to make referencing branches, groups, steps, and step actions easier Capture uses a numbering system.

PDD

Branch [Number]: [Branch Title]

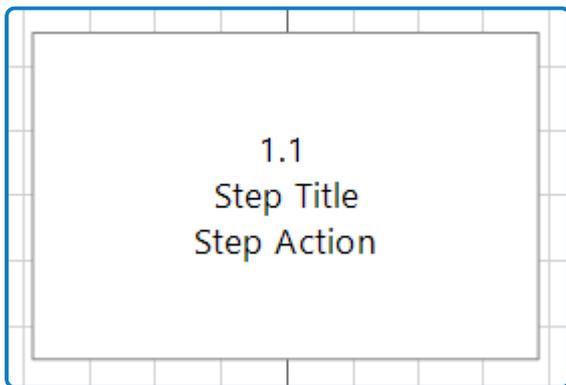
Group [Number] / [Step Title]

Step [Number] / Action [Number]: [Step Action]

Step [Number] / Action [Number]: [Step Action]

BPRELEASE

Actions on main page

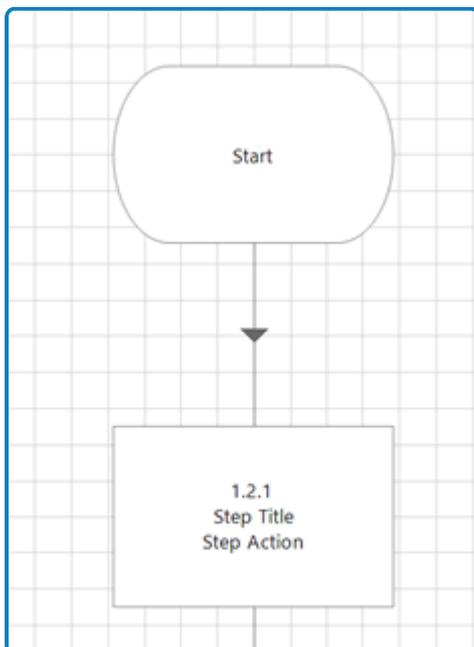


[Branch Number].[Group Number]

[Step Name]

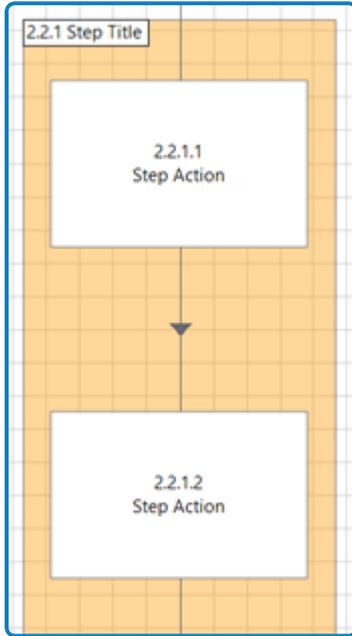
[Step Action]

Actions on sub page



[Branch Number].[Group Number].[Step Number]

Steps with multiple actions



Block

[Branch Number].[Group Number].[Step Number]

Image storage

Images created while capturing a process are stored in JPG format on the user's machine in the following fixed location, regardless of where Capture is installed `C:\Users\USERNAME\AppData\Local\Blue Prism\Capture\images`.

Images are stored locally on the user's computer, there is no external connection with which images can be transferred.

Functionality

To reduce memory usage, up to three copies of the original image may be stored in the images folder for the following purposes:

- **Image 1** – Full resolution image used in step editor and exported files.
- **Image 2** – Thumbnail of step in process map view.
- **Image 3** – Thumbnail of step in step editor.

When you edit an image (crop, blur etc.), copies are made of the original images with edits applied. The unused images will then be deleted when you exit Capture, see [Deleting images](#).

Deleting images

Unused images are deleted from the folder when you exit Capture (back-end services will continue to run until all unused images have been deleted, this service will then close down unassisted).

The time taken for the unused images to delete is logged in the app.log file.

Exporting processes

During export to JSON format, images are converted to base64 format and so will be supported by Capture 1.0 and 2.0.

Process database

To store processes, Capture uses a combination of a database (process.db) and an image store on the user's machine.

Database location

Process location

Processes are stored on the local machine only. There is no external connection for transferring images to an external location. Saved processes are stored in:

```
C:\Users\USERNAME\AppData\Local\Blue Prism\Capture\user_data
```

 This location stays the same even if the install location is changed.

Functionality

All processes are saved in the same database (process.db) in JSON format. Images are stored separately from the processes. They are stored in:

```
C:\Users\USERNAME\AppData\Local\Blue Prism\Capture\user_data\images
```

See [Image Storage](#) for more details.

Delete a process

To delete a process:

1. Click **Open** in Capture. The Load saved process window displays.
2. Select a process to delete from the list in the Load saved process window.
3. Click **Delete** from the available options in the Load saved process window.

Deleting a process will remove it from the database.

Back up a database

The process database is not automatically backed up by Capture. You can back up the process database and images any time by saving a copy of the user_data folder in:

```
C:\Users\USERNAME\AppData\Local\Blue Prism\Capture
```

Import a database

 Importing a new database overwrites all current processes. Save any processes you wish to keep before importing a new database.

To save current processes, click **Export** in Capture and select the **Capture process (.json)** option.

Close Capture before importing a new database and images. To import a new database, you will need to overwrite the process.db file and images folder in: `C:\Users\USERNAME\AppData\Local\Blue Prism\Capture\user_data`

Capture log files

The following document provides a breakdown of the log file that is generated when running Capture. The log file can be found in the following location:

C:\Users\USERNAME\AppData\Local\Blue Prism\Capture

Log file

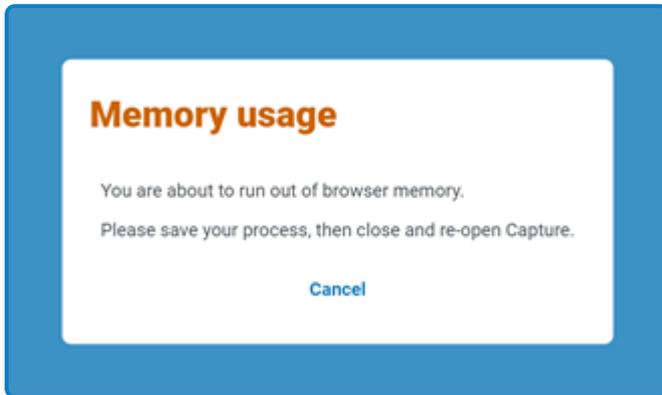
Log message	Meaning
run_server.py - 78 - INFO - Running app - version 2.0.0	The version of Capture.
controller.py - 21 - INFO - Getting Monitor Scaling Status ... controller.py - 23 - INFO - Monitor Scaling Status: False	Capture checking the monitor scaling status. If the status is False, this can result in errors in bounding boxes, screenshot errors, action descriptions etc.
controller.py - 15 - INFO - Start capturing	This gives the primary and secondary monitors screen resolution and if there are multiple monitors.
service.py - 154 - INFO - Started screenshot buffer	The screenshot process has started in the background.
capture_control_process.py - 97 - DEBUG - capture_control: Mouse-Keyboard Listeners resume	Mouse and keyboard listeners started.
app_hooper.py - 37 - INFO - App hooking failed since area was found to be too big	This means the application spying failed or ignored and the tool falls back to computer vision and OCR.
controller.py - 35 - INFO - Pause capturing capture_control_process.py - 105 - DEBUG - capture_control: Mouse-Keyboard Listeners Pause capture_control_process.py - 318 - DEBUG - Mouse-Keyboard Listeners Stopped	User paused recording. Mouse and Keyboard listeners paused.
controller.py - 45 - INFO - Continue capturing capture_control_process.py - 97 - DEBUG - capture_control: Mouse-Keyboard Listeners resume	User resumed paused recording process.
controller.py - 25 - INFO - Stop capturing and return process	User finished recording.

Log message	Meaning
<pre>generate_abstract_process.py - 1294 - INFO - Generated steps for birds eye view of process in docx controller.py - 49 - INFO - Finished exporting to pdd/pdf/xml/json/visio Capture backend finished exporting to the requested output (pdd/pdf/xml/json/visio)</pre>	<p>Backend server finished generation of birds eye view of process.</p>
<pre>controller.py - 67 - WARNING - Exception occurred while exporting to Visio: (-2147221005, 'Invalid class string', None, None)</pre>	<p>Visio is not installed on the user's machine.</p>

Warning messages

Memory usage

Editing a large process in Capture can use a lot of memory due to the large number of screenshots. We recommend using a computer with a minimum of 8 GB of RAM. See [Requirements](#) for details.

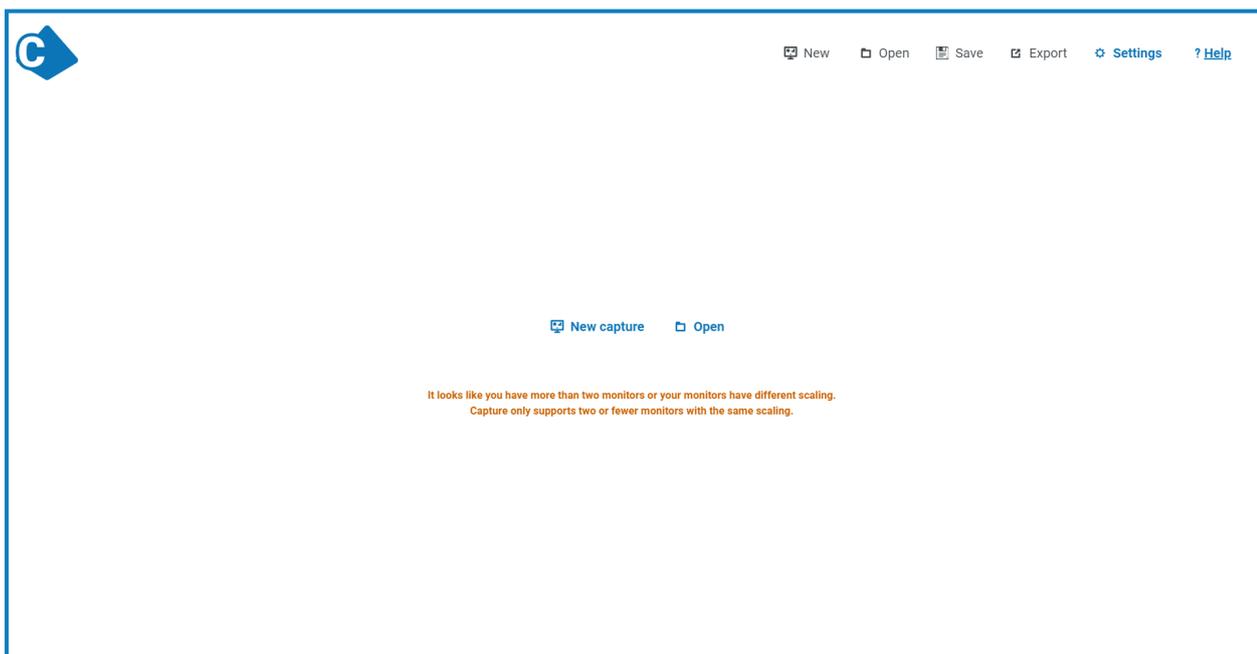


If your available memory is running low, you will see a warning message (above). It will ask you to save your process and close Capture. Doing this will clear the memory allowing you to simply reopen your process in a new Capture session and continue editing.

We strongly recommend that you follow these instructions when this message appears, as not doing so could result in Capture closing unexpectedly and the loss of all your edits since you last saved.

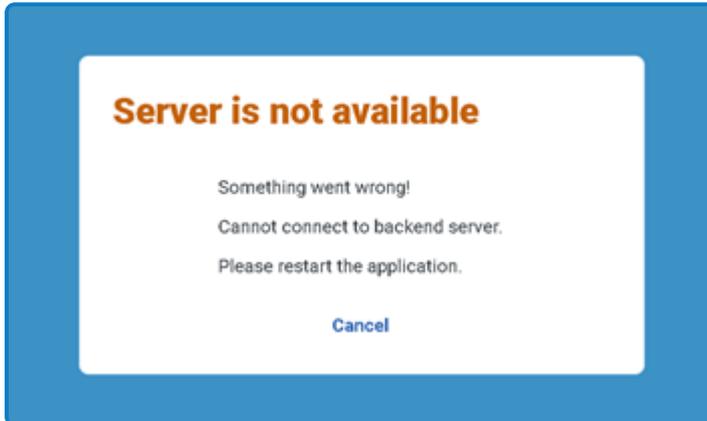
Screen scaling

Capture supports up to two monitors, however they must both be set to the same scale, for example, 100%. If they are set to different scales you will see the following warning:



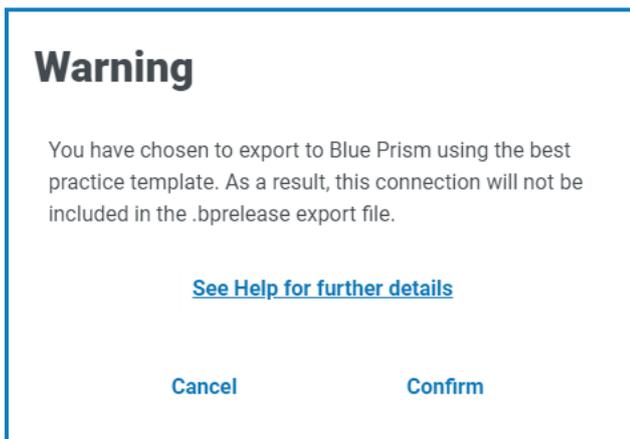
Server connection

If there is a server connection issue of any kind, you will see the following warning:



Best practice template

If **Apply best practices to .bprelease export** is enabled in the [User settings](#), you must only connect a decision point to the first group in a branch. If you attempt to connect a decision point to any other group in the branch, a warning displays. If you decide to proceed, the connection is not included in the BPRELEASE export file.



Any connections that do not adhere to the best practices set by the process template are displayed in orange on the main process screen. A warning is displayed in the Edit decision dialog for any connections that will not be included in the BPRELEASE export file.

Edit decision

Decision name

Branch name

 ✕

Branch name

 ✕

⚠ **Branch name**

This connection will be excluded from the .bprelease export. See Help for more details.

 ✕

For more information, see [The Blue Prism best practice process template](#).

The Blue Prism best practice process template

The Blue Prism best practice process template is a basic template for a process that:

- Loads work from a work source into a Blue Prism work queue.
- Processes items in the work queue.
- Completes once all the cases originally loaded into the work queue have been processed.

The Blue Prism best practice process template is provided as a starting point. You will need to customize it in line with your organization's methodologies and requirements.

To apply the Blue Prism best practice template to your exported process (BPRELEASE), select **Apply best practices to .bprelease export** in the [User settings](#).

Configure exception handling

This process template includes the following main types of exception handling logic:

- Functional (or component) retry exception handling within sub-pages.
- Top level work queue item exception handling on the main page.

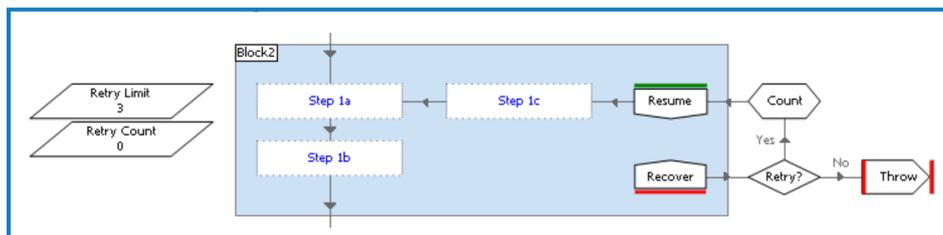
Main page

All of the Work Step pages of the process template are called from the Work Exception block on the main page.

- If the Work Step pages all complete successfully, the process flow goes to a Mark Item as Completed page.
- If an exception in any of the Work Step pages is not successfully handled by the retry logic within a page, it will be caught by the recover stage in the Work block on the main page and the process flow will go to the Mark Item as Exception page.
- If an exception occurs outside the Work Exception block when a case is not being worked, the process will terminate.

Sub-page

All pages that call Business Object action stages that interface with an application contain retry exception loops. These retry loops have exception blocks that contain action stages that perform a distinct function within a system.



These retry exception loops allow Blue Prism to recover from an exception, navigate back to a known point in the application, and try to perform the action again.

Configure data items

The following table contains the configurable items that you may need to modify to meet your organization's requirements.

Data item name	Data item type	Description
Retry Limit	Local	The initial value should be set to the maximum number of times you want the process to recover and retry the action being performed. The default initial value is 3, but you can increase it if an application is known to be very unreliable.

Configure stage items

The following table contains the configurable items that you may need to modify to meet your organization's requirements.

Stage name	Description
Retry?	By default, this decision stage retries System Exception and Internal exception types only. If you have other exception types you do not want to recover, you can change this stage to retry the exception types you use.
Step 1a, Step 1b	You can replace these note stages with the main flow steps of the distinct function being performed in a target system.  Your flow does not have to have the same number of stages as note stages.
Step 1c	This Note stage, after the Resume stage, should be replaced by the logic that will recover the application back to a known working state ready to try and perform the function again. Examples of how you might recover the application may be: <ul style="list-style-type: none"> • Close any child windows and pop-up windows that may be displayed. • Navigate back to a main menu or root screen from which the action can be tried again. • Close and restart the system and log back in.  If you are calling Component Objects or Sub-processes from your process that already contain retry exception handling, you will not need to repeat the retry logic in your process.

Configure pages

Each page in the Blue Prism best practice process template is explained below, with instructions on how each should be configured for your needs.

Configure the main page

The main page calls sub-pages that do all the work that is required and is a high level view of what the process does. The main page contains a number of global Environment, Session, and Queue data items. It has the top level exception handling of the process, to handle exceptions that bubble up from any sub-page when a case is being worked.

The following table contains the configurable items that you may need to modify to meet your organization's requirements.

Data item name	Data item type	Description
Process name	Global	The initial value of this data item should be set to the name of the process you are creating. It can be passed to objects or sub-processes that it calls if they have process specific actions to take.
Queue name	Global	The initial value of this data item should be set to the name of the main work queue used by this process.
Stop after time	Session variable	The initial value should be set to the time when the process should stop running. It might be set to a time before a system used by the process is no longer available, or a time when another process needs to be started instead. This session variable can be changed at run time if there is an operational reason for a running session to finish at a different time from the default.
Stop after items	Session variable	This data items allows the developer to configure the process to only process a pre-defined number of cases. The template has the initial value set to 9999999999, which means that the process will work all items. This session variable can be changed at run time if there is an operational reason to only work a set number of cases before completing.
Stop ASAP	Session variable	This session variable can be changed from False to True to stop the process. If set to True, the process will stop. If a case is currently being worked, it will be completed before stopping.

Configure Start Up page

The Start Up page gets the process ready to be able to work cases. It does this by:

- Performing any configuration and/or verification that is required.
- Starting and logging into the systems that the process uses.

The following table contains the configurable items that you may need to modify to meet your organization's requirements.

Stage name	Description
Environment validation	If there is any validation of the environment required by your process, it should be added to the Start Up page. These might include: <ul style="list-style-type: none"> • Checking that the directory paths used by the process exist. • Checking that any databases or web services used are available. • If objects require a specific resolution to run, calling an action that ensures the resolution is correct.

Configure the Populate Queue page

The Populate Queue page in the template is empty. A flow should be added to get work and add it to the work queue.

Configure Work Step pages

These pages should each be updated to contain the logic to work each Workflow case, with each page containing logical specific task groupings.

For example, a process might have Work Step pages called: 01 - Get customer information, 02 - Evaluate Customer, 03 - Update Customer, and 04 - Add System Notes.

- Rename the pages to state what the page does.
- Ensure that each page performs a distinct function.

You can have as many or as few of these Work Step pages as your process requires. You can delete some of the template pages, or add additional pages as required.

- Add or remove additional work step pages as required.
- Ensure that Each Work Step page that calls Business Object actions contains retry exception handling as described in the previous exception handling section.
- Include retry exception handling if a system is being used by the sub-page.

Configure the Mark Item as Completed page

This page should be updated to perform any actions that need to be done if the work queue item has been successfully processed without an exception.

By default, the page updates the status on the work queue item and marks it as completed. If there are any additional actions that the process needs to perform at completion, they should be added to this page.

Configure the Mark Item as Exception page

This page should be updated to perform any actions that need to be done if the work queue item has been successfully processed without an exception.

By default, the page flow takes two main paths, one for System Exceptions, and the other for Business Exceptions.

Configure data items

Data item name	Data item type	Description
Consecutive exception limit	Local	The initial value of this data item should be set to the maximum number of times you want the process to try and process subsequent work queue items that have the same System Exception. The default initial value is set to 3.

Configure the stage items

Stage name	Description
Tag item	<p>The item is tagged with the current exception type. This is required for the Blue Prism performance report to work, as this expects all exception work queue items to be tagged as either a system exception or business exception.</p> <p>If you are using any other exception types, you will need to change the logic of this tagging in your flow so that the item is only tagged as one of these two main types.</p>
Retry Exception?	<p>This decision stage splits the flow of the page into business exception items (marked as exceptions), and system exception items, which may cause the process to terminate if they occur repeatedly.</p> <p>If you are using any other exception types, this decision may need to be modified to ensure that your exception types move down the correct process flow.</p>

Configure Reset Global Data page

Any data items that are global to the whole process and need to be reset before working a new case can be reset to their initial value by the call to the Reset Global Data page.

Move any global data items that need resetting for each case onto this page.

Configure the Close Down page

The close down page performs any tasks that need to be done before the process completes.

By default these include cleanly exiting the applications being used. Any other actions that need to be performed before the process completes should be added to this page.