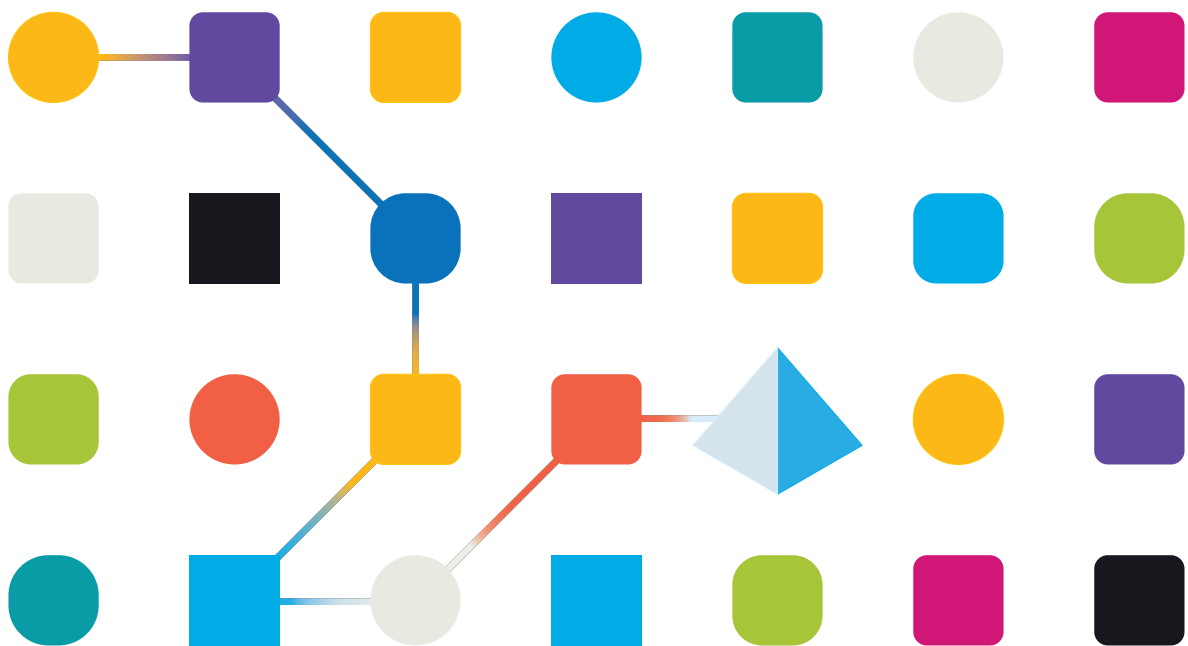


blueprism[®]

Hub 4.1 User Guide

Document Revision: 1.2



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Hub

Blue Prism brings together the principles of cloud, Robotic Process Automation (RPA) and artificial intelligence (AI) designed to automate and digitize the execution of knowledge-based work. Digital workers are deployed into business operations and work by emulating the way people use business systems, the decisions they make and the processes they follow, to augment, replace, or digitize manual work processes.

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

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

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

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

Administration and configuration

When Hub is installed for an organization, it is delivered with a main administrator role. This role is used to configure the environment with information for items such as email and connection to your RPA database.

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

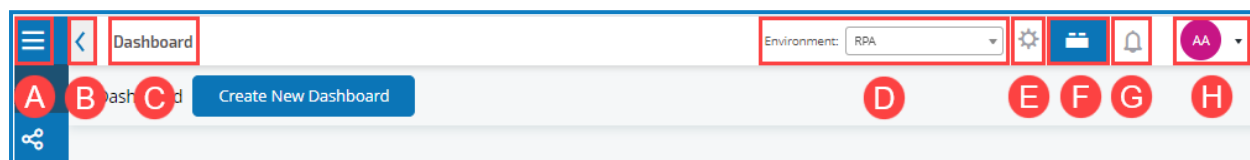
There are six main areas of functionality that the administrator role gives access to:

- [Basic administration](#) – Manage your profile, environment, and other settings.
- [System configuration](#) – Configure email and database settings.
- [Plugin management](#) – Install, update, and license Hub plugins.
- [Roles and user management](#) – Configure user accounts and manage registration.
- [Authentication settings](#) – Configure a Lightweight Directory Access Protocol (LDAP) to you Active Directory environment.
- [Customization settings](#) – Configure the look and feel of the Hub user interface.

Basic administration

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

The features on the top navigational menu bar include:



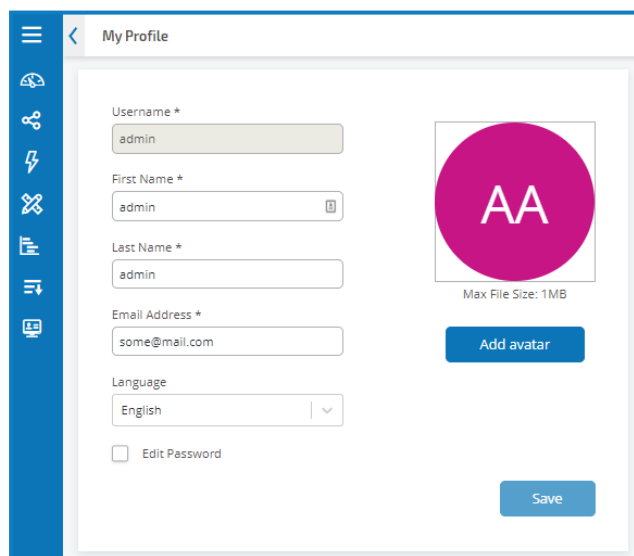
The features on the top navigational menu bar include:

- A. Expand or collapse the menu to see the installed plugins.
- B. Collapse or expand the left navigational bar.
- C. The area of the Hub user interface you are currently using.
- D. The currently selected environment. Environments are set up in the database connections screen and any present can be selected here.
- E. The Hub settings – available only to administrators.
- F. The plugin repository – available only to administrators.
- G. Your notifications. Only notifications that you are authorized to see or that are applicable to you will show.

Notifications are only used by the [Automation Lifecycle Management](#) plugin.

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

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



System configuration

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

Email settings

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

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

Email settings

If you need help configuring your SMTP settings, please speak to your IT team in the first instance.

SMTP host *	Port *
<input type="text" value="smtp.mycompany.com"/>	<input type="text" value="587"/>
Sender email *	Encryption *
<input type="text" value="interact@mycompany.com"/>	<input type="text" value="SSL-TLS"/>
<input checked="" type="checkbox"/> SMTP authenticate	
Username *	Password *
<input type="text" value="interact@mycompany.com"/>	<input type="text" value="Enter Password"/>
Send test email to	
<input type="text" value="some@mail.com"/>	

Save

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

Database settings

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

Database connection(s)					
Connection name	Database name	Authentication Mode	Server name or IP address		
	HUB-Development	SQL with SQL Authentication	tcp:bpc-sql-4jrhv5uftsrf.database.windows.net,1433		

Blue Prism database connection (s) - 1/10					
Connection name	Database name	Authentication Mode	Server name or IP address	IADA URL	Actions
RPA	RPA-Development	SQL with SQL Authentication	tcp:bpc-sql-4jrhv5uftsrf.database.windows.net,1433	https://iada-product-training-development.azurew	...

Add a Blue Prism database connection

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

Database settings

Authentication mode *

SQL with SQL authentication

Server name or IP address *

DB01

Connection name *

Production

Database name *

RPA

Timeout *

90

User ID *

sa

Password *

Enter Password

IADA URL

Important: once selected you cannot change your URL.

iada.local

Cancel

Save

The IADA URL sets up the connection of the IADA web service in order to push items to the RPA database and Blue Prism queue mechanism. It is created during installation and cannot be edited.

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

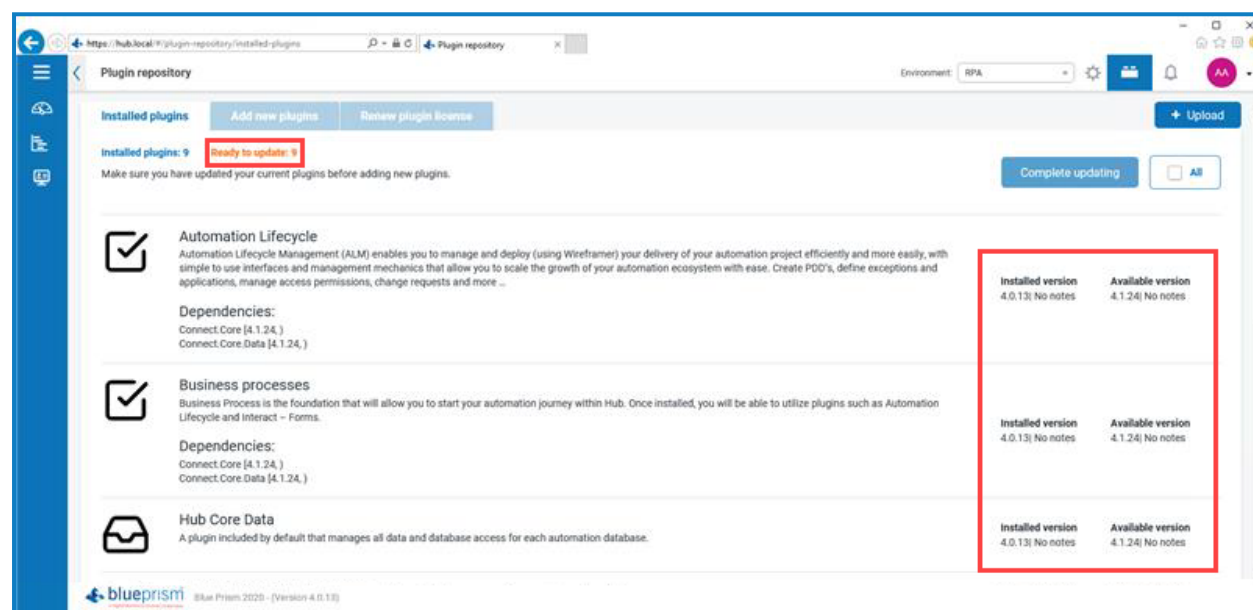
Plugin management

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

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

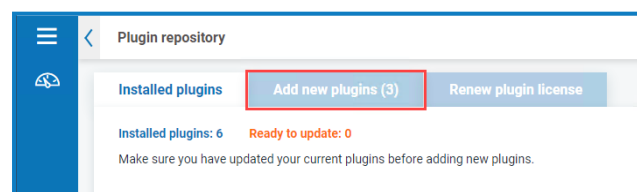
For each plugin a description details the functionality and the version number is displayed. If any updates are available for a plugin, this will also show and let you update

This screen is also where you apply updates to plugins. Where an update is available this will also be highlighted, showing details of the new version and giving you the option to update. To update, select the **All** check box and click **Complete updating**.



Add a plugin

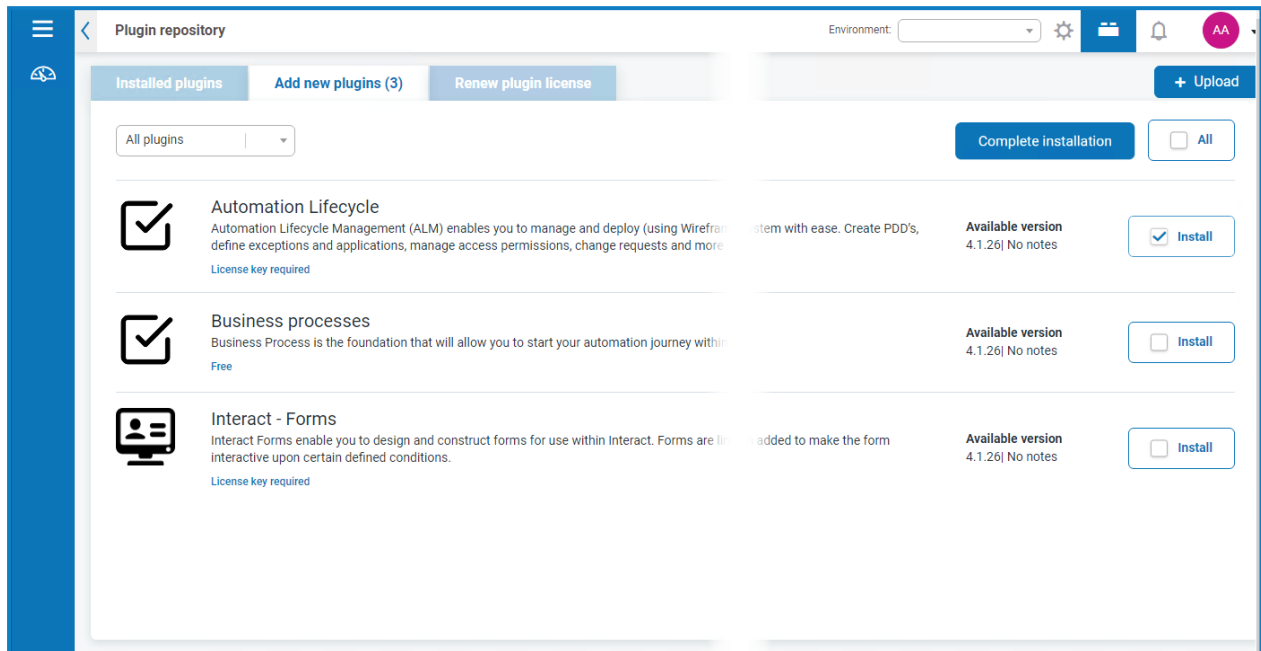
You are notified in the plugin repository if new plugins are available. The Add new plugins tab will show a number in brackets representing how many new plugins are available. Multiple plugins can be installed at any one time and if the plugin is dependent on another plugin which isn't currently installed, that plugin is automatically installed.



When a plugin is installed or updated, the website will automatically restart. It is therefore essential that the installation of plugins is performed out of hours, during maintenance windows.

To add a plugin:

1. In the Installed plugins tab, apply any available updates to your installed plugins. It is essential that all plugins are up-to-date before adding new ones.
2. Click **Add New Plugins**.



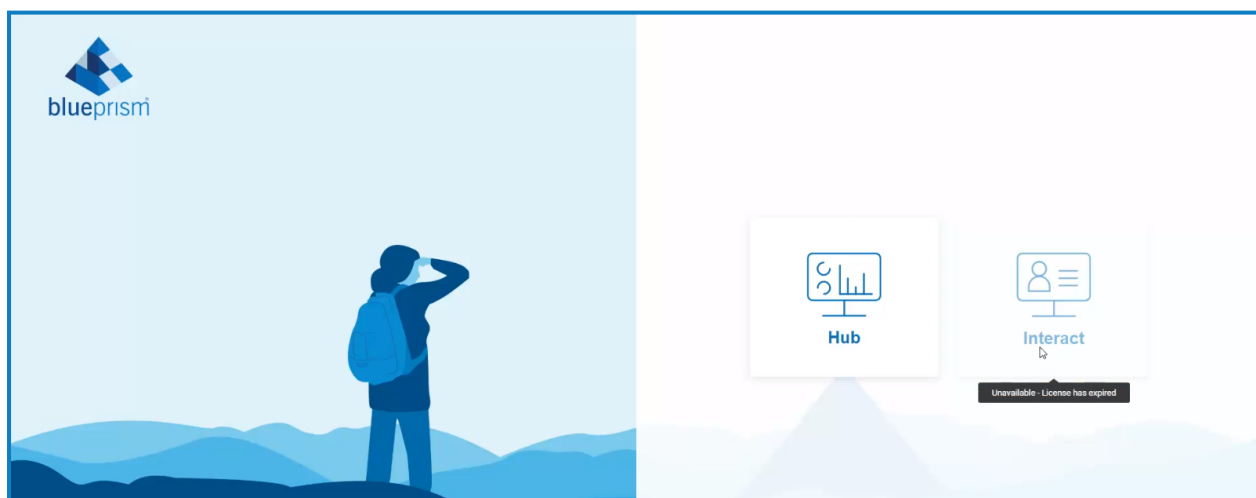
3. Select the **Install** check box for a plugin, or to install all the available plugins, select the **All** check box.
4. Click **Complete installation** to update the selected plugins.

The website automatically restarts to complete the installation.

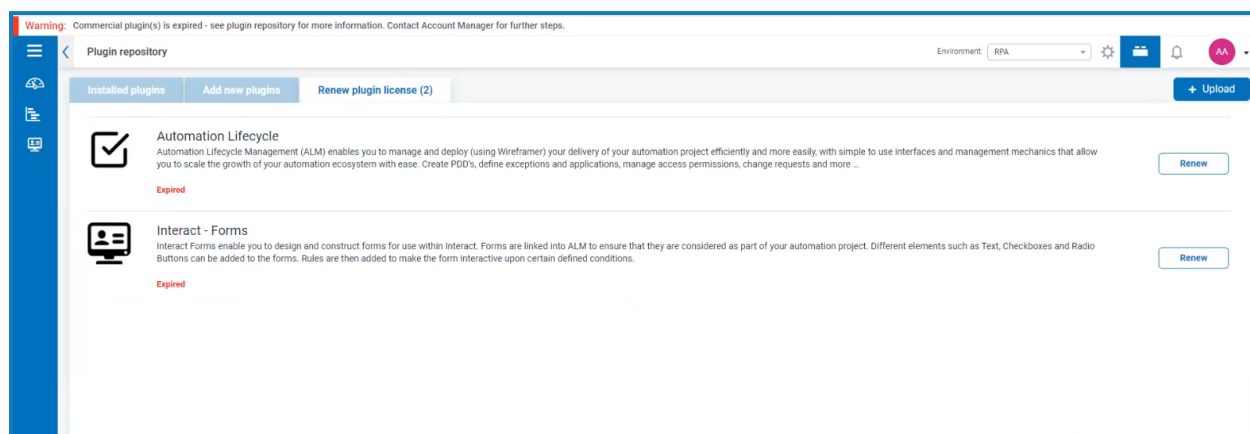
Plugin licensing

Included in the Plugin Repository is a license manager that lets you add and renew the licenses for any licensed plugins.

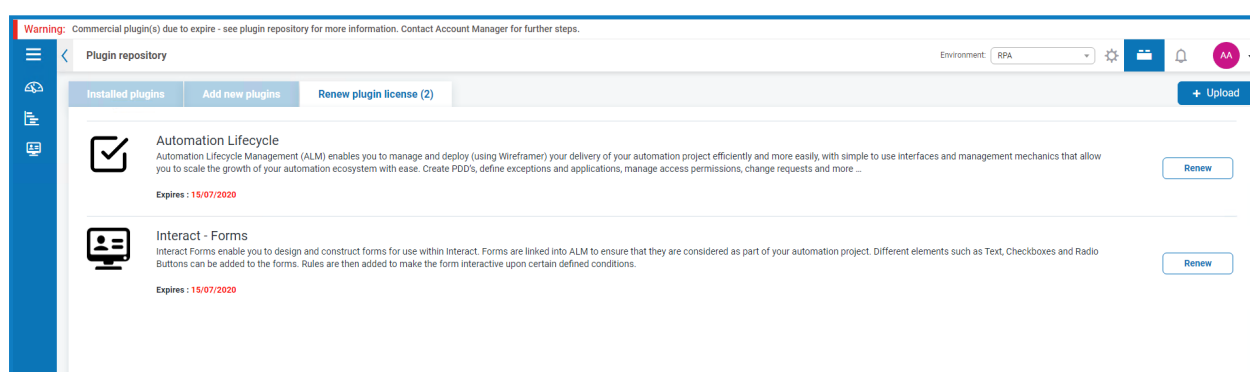
If a license has expired this will be indicated on the IMS login page as illustrated below.



Select the **Renew plugin license** tab to see a list of installed plugins and their license status.

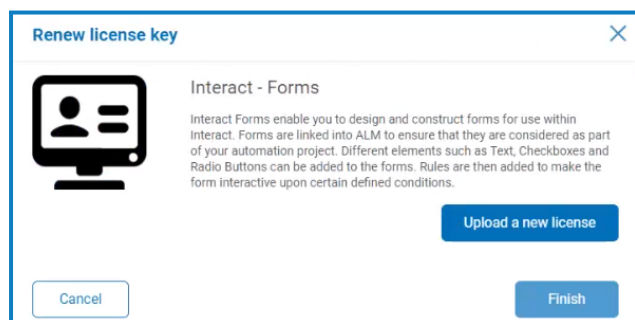


You are warned 14 days before the license is due to expire.



To renew a license, click **Renew** for the required license to display your licensing options.

Upload a valid license and click **Finish** to apply.



Roles and user management

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

Role name	Type	Description	Users	Hub plugins	Interact forms	Actions
Automation Lifecycle Manager	Hub					...
Demonstration Role	Hub		...	Digital Wis... en_Auto... +12		...
General	Interact	General Organizational Forms	...		Holiday R...	...
Hub Administrator	Hub		...	Digital Wis... en_Auto... +12		...
Human Resources	Interact	Human Resources role for the Interact Po...	...		New Starter	...
Sales	Interact	Sales Forms	...		Adding Or... Adding Pri...	...

Roles

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

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

Add a role

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

Create Role

Basic Users Plugins or Forms

Role Type

Hub Interact

Role Name *

Enter Role Name

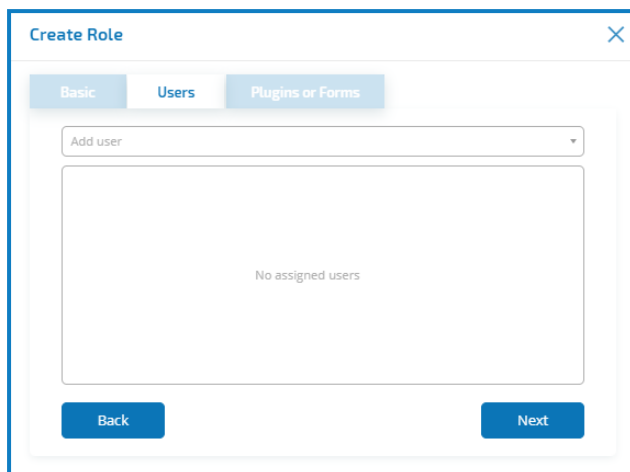
Role Description

Enter Role Description

Next

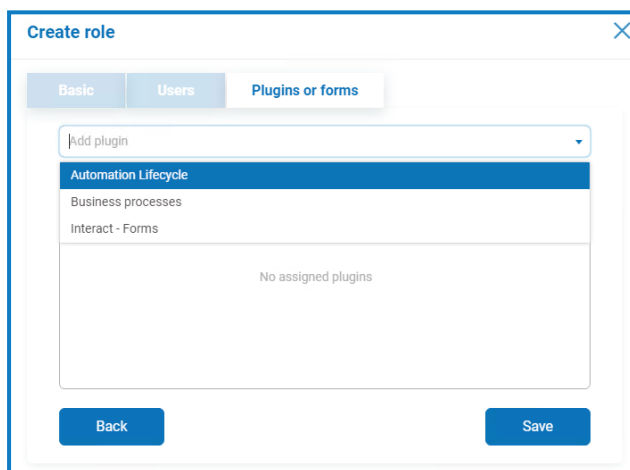
4. Click **Next**.

5. In the Users tab, select the users that will be assigned this role.



The screenshot shows the 'Create Role' dialog box with the 'Users' tab selected. At the top, there are three tabs: 'Basic', 'Users', and 'Plugins or Forms'. Below the tabs is a search bar labeled 'Add user'. The main area of the dialog is empty, displaying the text 'No assigned users'. At the bottom, there are two buttons: 'Back' and 'Next'.

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



The screenshot shows the 'Create role' dialog box with the 'Plugins or forms' tab selected. At the top, there are three tabs: 'Basic', 'Users', and 'Plugins or forms'. Below the tabs is a search bar labeled 'Add plugin'. A dropdown menu is open, showing a list of plugins: 'Automation Lifecycle', 'Business processes', and 'Interact - Forms'. The main area of the dialog is empty, displaying the text 'No assigned plugins'. At the bottom, there are two buttons: 'Back' and 'Save'.

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

Users

Create accounts for your users.

Add a user

1. On the Manage Users, Roles and Registrations screen, select the **Users** tab.
2. Click **Add New** to display the Create user dialog.
3. Enter the user's details:
 - Username
 - First name
 - Last name
 - Email address
 - Theme

4. To create a default password for the user, select the **Create password for user** check box and add a password. If this option is not selected, the user will be prompted to enter a password on log on using a link that is emailed to them when the account is created.
5. Configure the roles and privileges for the user:
 - **Hub** – Select this check box for standard hub users.
 - **Hub Administrator** – Select this check box to give the user role administrator permissions.
 - **Hub roles** – Select the Hub roles required for the user. If the role has not yet been created, you can edit the user at a later date to assign new roles. If the user was created without a Hub Role being assigned in the Setup Status column of the User form an exclamation mark will illustrate that the user setup has not been completed. Though the user will be able to log in to Hub, they will not be able to perform any tasks as they will not have access to any plugins.
 - **Interact** – Enables users to be assigned Interact Forms. See the [Interact user guide](#) for more information.
 - **Approver** – Select this check box to give the user role approval rights for Interact.
 - **Interact roles** – Select the Interact roles required for the user. If the role has not yet been created, you can edit the user at a later date to assign new roles.
6. Click **Save** to create the user.

Create user

User

Roles and privileges

Username *

John

First name *

John

Last name *

Smith

Email address *

john@mycompany.com

Theme *

Blue Prism (Default)

☒ Create password for user

Password *

Confirm password *

☒ Hub☐ Hub Administrator

Hub roles

Select Roles

☐ Interact☐ Approver

Interact roles

Select Roles

Cancel

Save

Registration

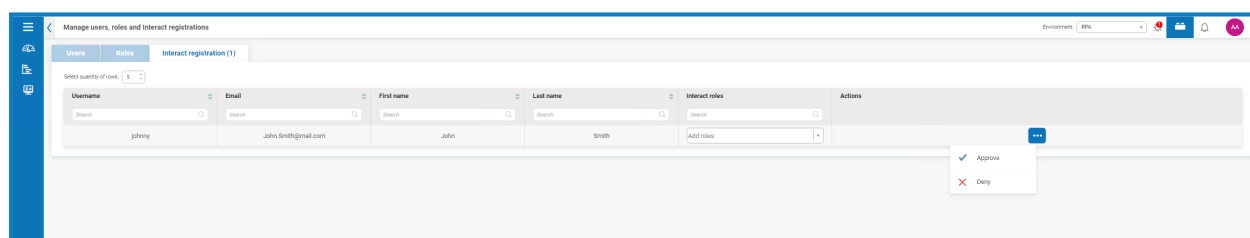
Users can request an Interact user account from the registration page: <https://{hostname}/#/user-registration>



The registration page features the Blue Prism logo in the top left corner. A language dropdown menu in the top right is set to 'English'. The main content area is split: the left side shows a silhouette of a person with a backpack looking out over a mountain range, and the right side contains a 'Register for Interact' form. The form has fields for Username, First name, Last name, and Email address, each with a corresponding input box. A 'Register' button is located at the bottom right of the form.

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

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



The screenshot shows the 'Interact registration (1)' tab in the 'Manage users, roles and interact registrations' section. It displays a table with one registration request for a user named 'johny' with email 'john.smith@gmail.com'. The table has columns for Username, Email, First name, Last name, Interact roles, and Actions. A dropdown menu is open under the Actions column, showing 'Approve' and 'Deny' options.

Username	Email	First name	Last name	Interact roles	Actions
johny	john.smith@gmail.com	John	Smith	Add roles	Approve Deny

Authentication settings

Authentication Settings allows the configuration of an Lightweight Directory Access Protocol (LDAP) connection to an organization's Active Directory environment.

1. From the setting cog, click **New Connection**.

The LDAP Settings dialog displays.

LDAP Settings

Configuration

Connection Name *

BPC AD Connection

Domain *

bpc

LDAP Server *

blueprismcloud-srv1.local

Port Number *

389

Base DN *

DC=blueprismcloud, DC=local

Time Out *

10

Query Bind

Username *

administrator

Password *

Attributes

If you need help configuring your LDAP settings please visit <https://knowledge.thoughtonomy.com/ldap>

Username *

Username

Last Name *

LastName

First Name *

FirstName

E-mail *

Email

Test Username *

Enter Test Username

Lookup User

Save

2. Complete the Configuration fields:
 - **Connection Name** – a name that you want the connection to be known as;
 - **Domain** – the name of domain you are connecting to, for example “bpc”.
 - **LDAP Server** – the hostname of the LDAP server, for example blueprism-srv1.local.
 - **Port Number** – is the Port Number it operates on, by default this is Port 389.
 - **Base DN** – is the starting point within the Active Directory where the system begins to look for users, for example dc=blueprism, dc=local.
3. Complete the Query Bind fields:
 - **Time Out** – is the timeout period in seconds that the system will wait to get a response from the Active Directory server.
 - **Query Bind Username** – is an Active Directory administrator that has access to the organization’s LDAP system.
 - **Query Bind Password** – is the password for the Active Directory administrator.
4. Complete the Attributes fields. The purpose of this section it to map the Active Directory attributes to the Hub fields. The text entered in these fields must match named attributes within the user profile in Active Directory. You can use the Active Directory Users and Computers (ADUC) tool to find the user attributes by selecting a user and then clicking the **Attribute Editor** tab to view the mapping of attributes to values.
 - **Username** – The Active Directory attribute name for the username, for example, ‘SAMAccountName’.
 - **First Name** – The Active Directory attribute name for the user's first name, for example, ‘givenname’.
 - **Last Name** – The Active Directory attribute name for the user's last name, for example, ‘sn’.
 - **E-mail** – The Active Directory attribute name for the user's email, for example, ‘mail’.
5. To test that everything is set up correctly, enter the username in **Test Username** and click **Lookup User**. The text entered in the **Test Username** field must match the text format of the Active Directory Attribute. For example, if the username is set to:
 - ‘SAMAccountName’, then the test data is likely to be in the format *domain\user*.
 - ‘name’, then the test data is likely to be in the format *user*.

The associated information will be retrieved and populated in the corresponding Attributes fields.

6. Click **Save**.
7. You are then prompted to import users from the Active Directory or you can choose to do synchronize at a later stage.
8. When synchronizing, a list of users to be imported displays.
9. Select a user to import and assign the appropriate Hub roles and any Interact responsibilities.

If you configure a user to have a Hub Administrator role, they will have access to all the plugins and features of Hub, including the ability to create new Database and LDAP connections and other security features so it is important to assign this role with care.

10. Repeat for all required users.

Synchronizing Active Directory users

When additional users are added to the Active Directory, those users must be synchronized with Hub. From the Authentication Settings screen, using the three dots (Meatball menu) and select the Re-Sync option corresponding to the LDAP connection that you wish to use, you will be allowed to add any new users to the Hub user base.

Customization settings

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

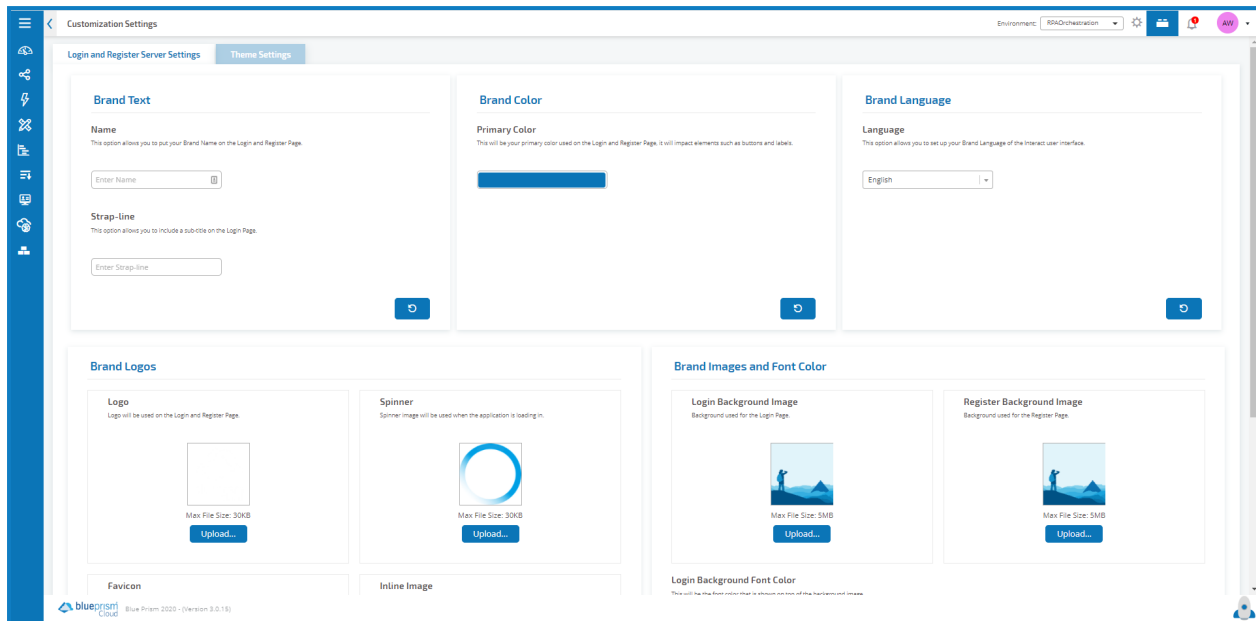
Login and register server settings

Administrators can change the following settings:

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

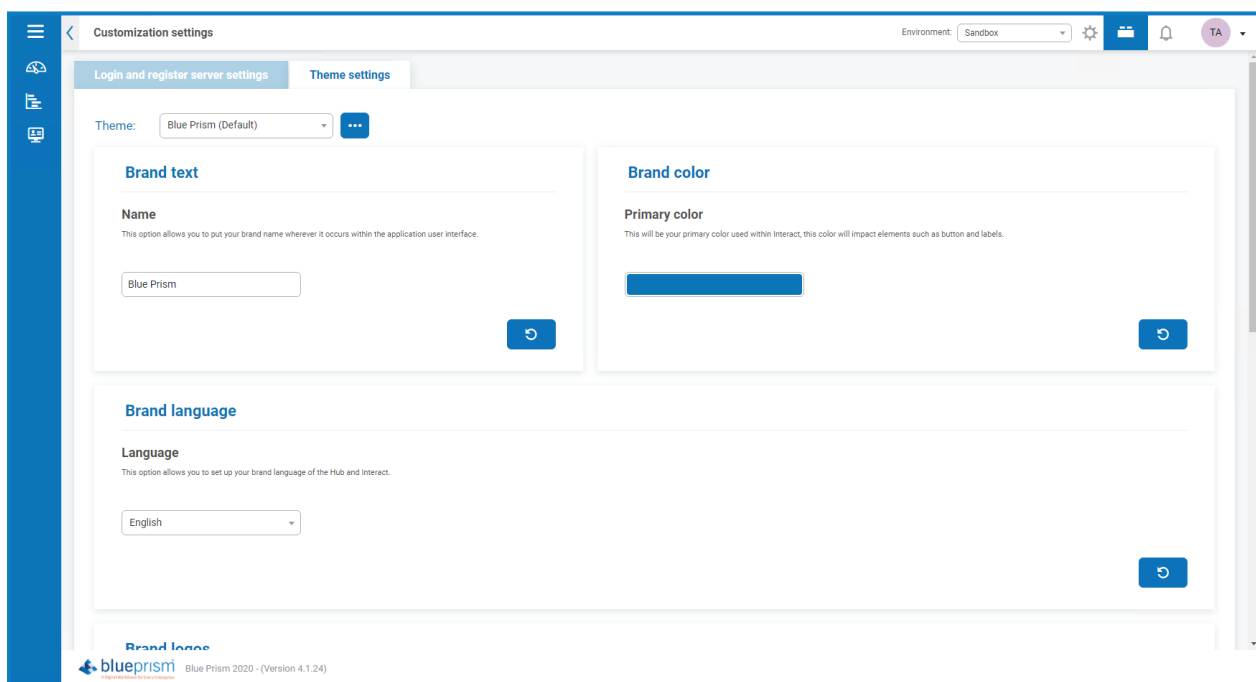
User can also set their own language preference through their profile settings or through the Identity Management System (IMS) server.

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



Theme settings

Themes allow you to customize the Hub and Interact user interface, adding brand logo's, changing the colors in the front page, and selecting the language applied to the user interface. Themes can be customized for different users, providing a different look and feel depending on who logs in.



The default theme is automatically selected when creating a user. However, any of the available themes can be applied for a user by selecting one in the Theme field when [creating](#) or editing users.

Using Hub

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

In this topic:

- [Dashboards](#)
- [Automation Lifecycle Management plugins](#)
- [Interact plugins](#)

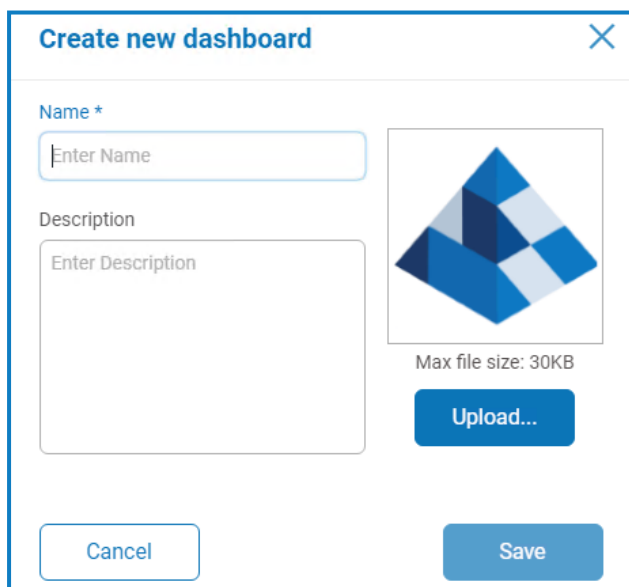
Dashboards

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

The dashboard is a configurable page that provides a tailored view of your automation processes. To configure information displayed by the dashboard, [add widgets](#). You can also create multiple dashboards to represent different views of the information available to enable you to efficiently manage your automations.

Create a dashboard

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



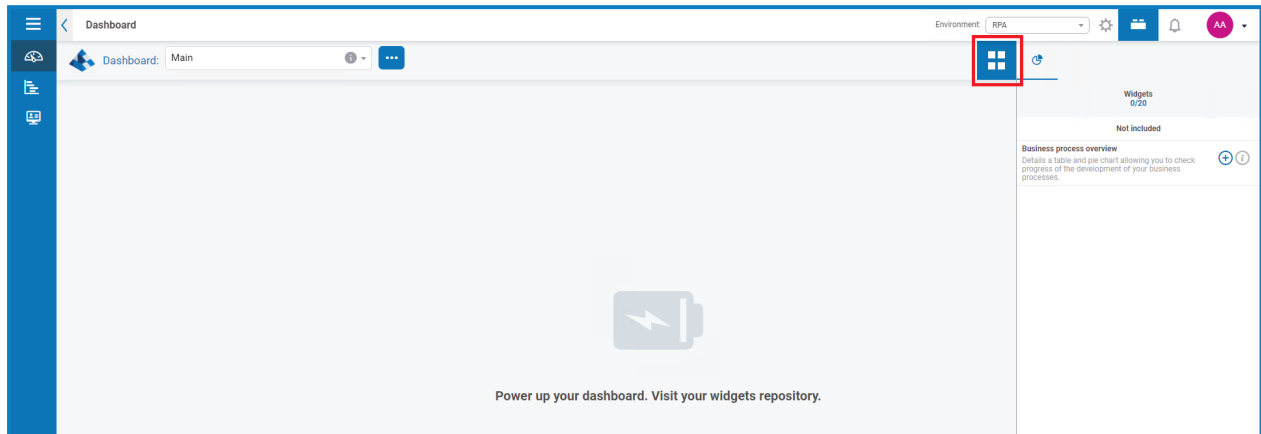
4. Click **Save**.

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

Add widgets

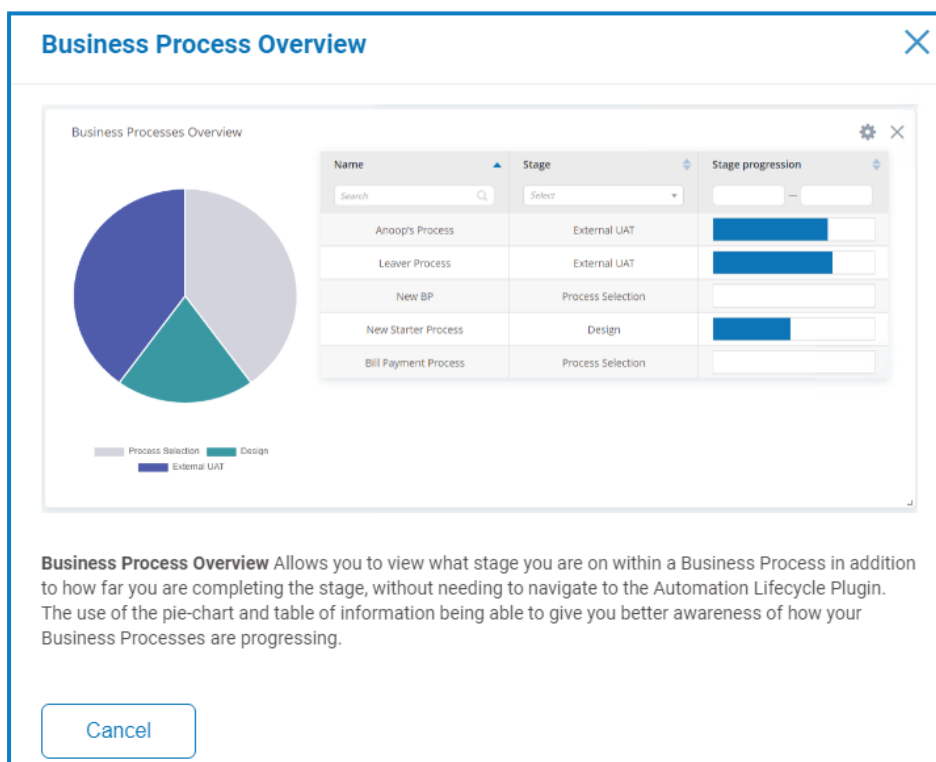
Widgets are the dashboard components that can be used to visually display different kinds of information, for example, the Business Process Overview widget.

1. Click the widget repository button to display a list of available widgets.



2. To view more details about a widget, click its information button.

Information about what is displayed when the widget is added to the dashboard and how it can be customized displays.

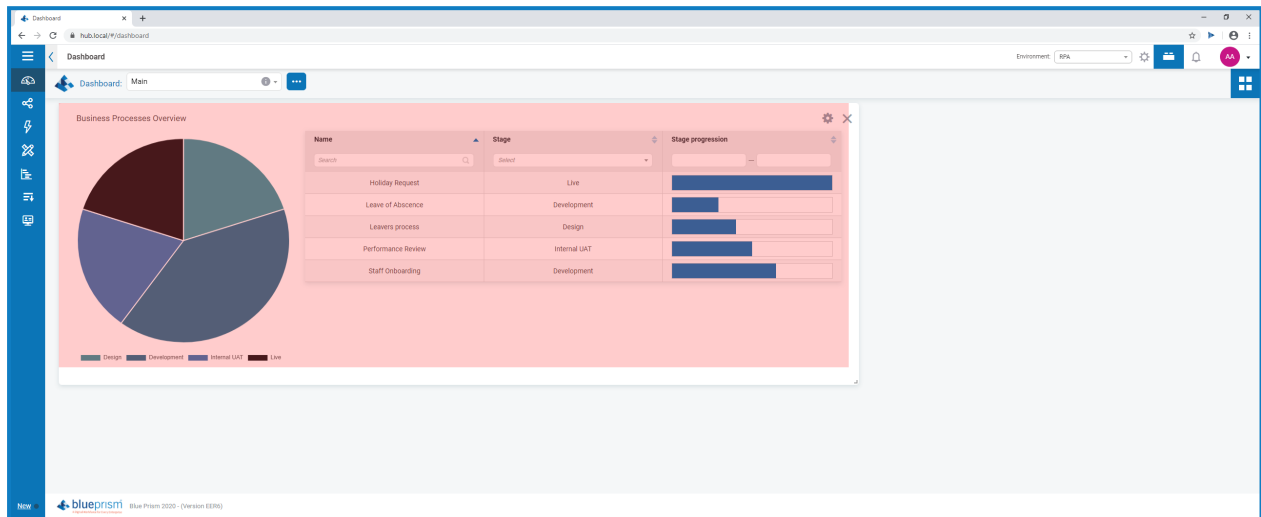


3. Click the + button for a widgets to add it to the dashboard.
4. Once you have added the widgets required, click the widget repository button to see your full dashboard again.

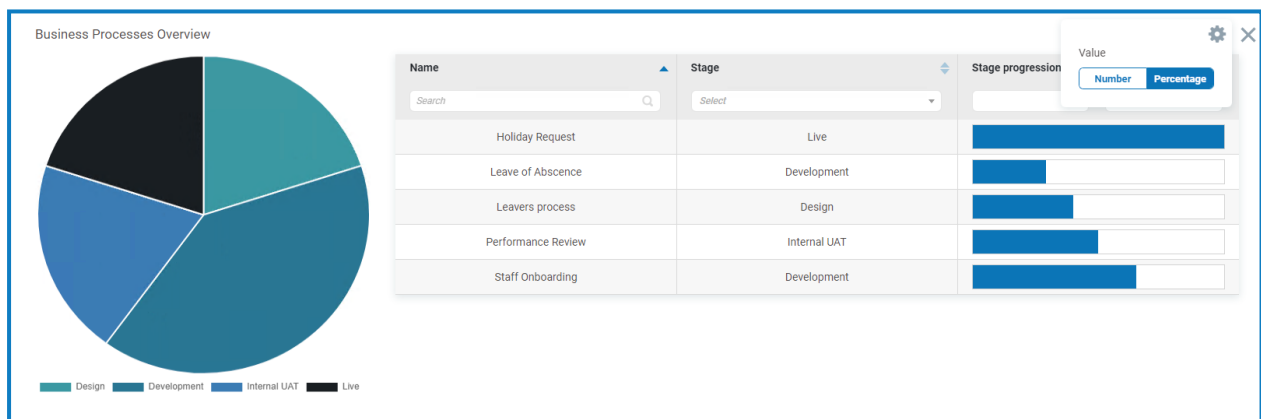
Configure widgets

A widget can be:

- **Moved and resized** – Move widgets by dragging and dropping to the required position on the dashboard. Widgets can also be resized by grabbing the bottom right corner and dragging to fit to the size required.



- **Customized** – Many of the widgets are customizable – select the settings cog for a widget to access the settings.



To remove a widget from a dashboard, select the cross for the required one.

Automation Lifecycle Management plugins

The Automation Lifecycle Management plugins are an optional service that require an additional license key to operate.

Automation Lifecycle Management

The Blue Prism digital workers provide an unparalleled skill and capability set with further use cases being addressable with each new release. Whilst capability is important, Blue Prism have paid equal attention to the usability during the delivery cycle, ensuring enterprises are provided with guard rails to ensure best practices are met.

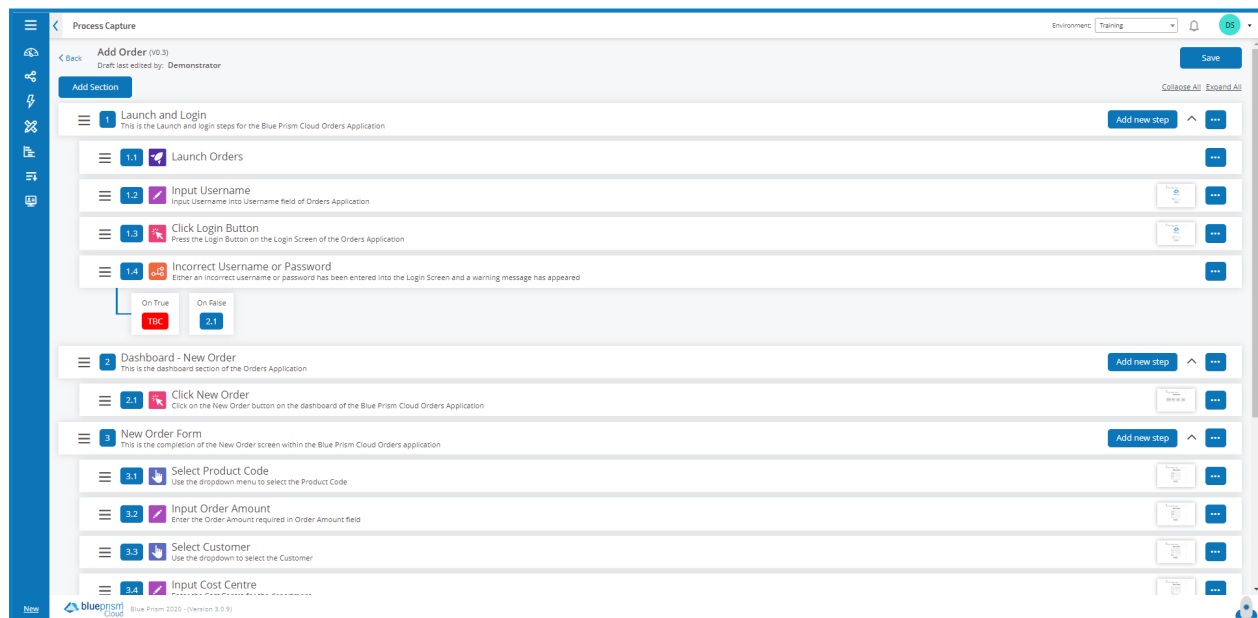
The Robotic Process Automation (RPA) and Intelligent Automation (IA) industry has a multitude of methodologies and operating models however these are contained in documents and training materials only.

With the development of Blue Prism's Automation Lifecycle Management (ALM) capability within Hub, enterprises early on in their RPA/IA journey can benefit from application driven controls to ensure the key milestones of a successful delivery are met.

ALM provides the following functionality:

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

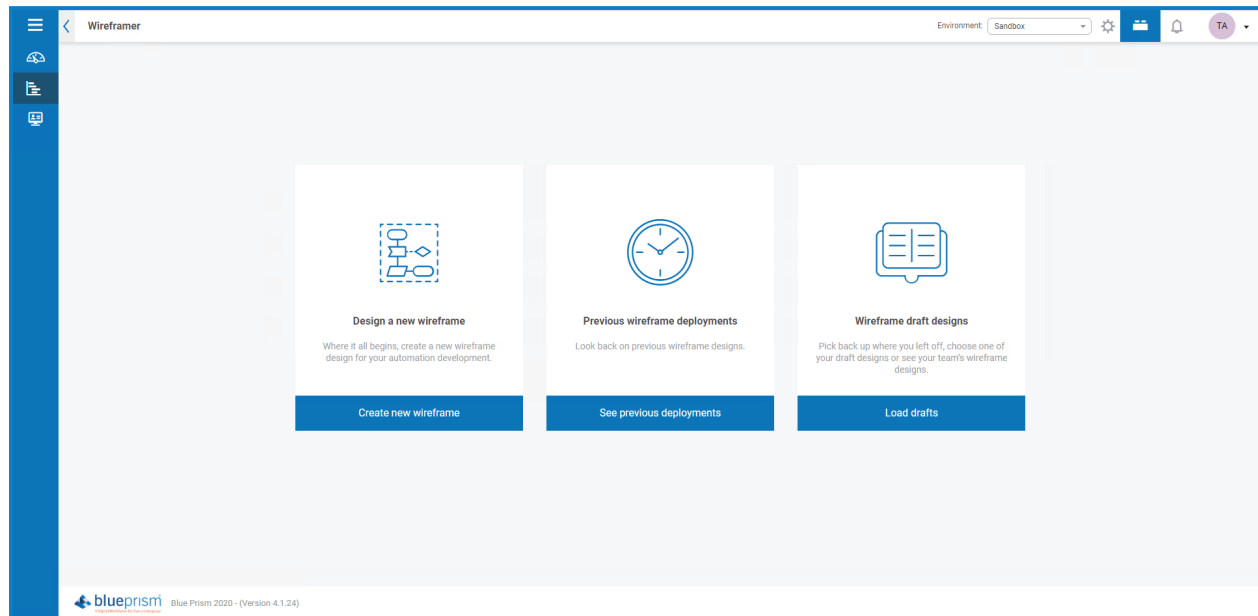
The ALM plugin provides a framework for business analysts to capture the process definition of the business process, delivering exception handling in a consistent manner and a review and sign-off structure.



For more information see the [ALM user guide](#).

Wireframer

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



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

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

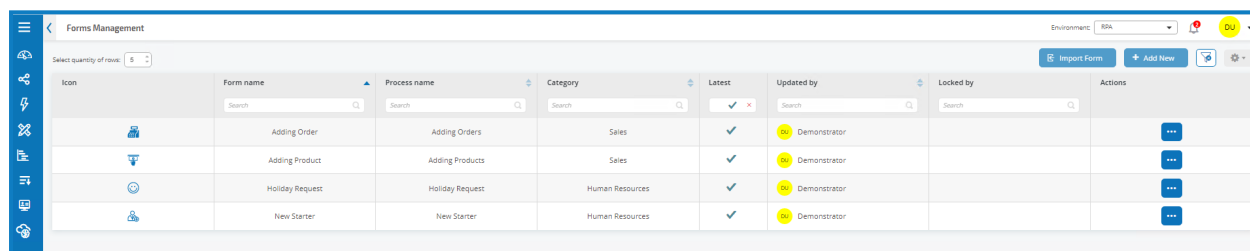
For more information see the [Wireframer user guide](#).

Interact plugins

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

Forms

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



Icon	Form name	Process name	Category	Latest	Updated by	Locked by	Actions
	Adding Order	Adding Orders	Sales	✓	Demonstrator		...
	Adding Product	Adding Products	Sales	✓	Demonstrator		...
	Holiday Request	Holiday Request	Human Resources	✓	Demonstrator		...
	New Starter	New Starter	Human Resources	✓	Demonstrator		...

Blue Prism Interact functionality is split across two Blue Prism components; firstly, a developer utilizing Hub and the Forms plugin to create and publish Forms for an end user to utilize; secondly the end user interface where they can, by utilizing published Forms, interact with the digital workforce.

For more information, see the [Interact user guide](#).

Hub restrictions

The following table list the restrictions enforced when using Hub.

Item	Restriction	Related sections
Password Restrictions	Passwords must be: <ul style="list-style-type: none">• At least 1 upper-case• At least 1 number• At least 1 special character• At least 8 character length	
Avatar Image	Less than 1MB and no greater than 1920 x 1080 pixels	Basic administration on page 3
Dashboard Image	Less than 30KB in size and no greater than 200 x 200 pixels	Dashboards on page 18
Dashboard Widgets	Limited to 20 widgets per dashboard	Dashboards on page 18
Brand Logo	PNG, JPEG or JPG no greater than 30KB	Customization settings on page 16
Spinner	PNG, JPEG or JPG no greater than 30KB	Customization settings on page 16
Login Background Image	Less than 5MB and no greater than 1920 x 1080 pixels	Customization settings on page 16
Register Background Image	Less than 5MB and no greater than 1920 x 1080 pixels	Customization settings on page 16
Favicon	ICO or PNG no greater than 5KB	Customization settings on page 16
Inline Image	Less than 30KB and no greater than 305 x 80 pixels	Customization settings on page 16