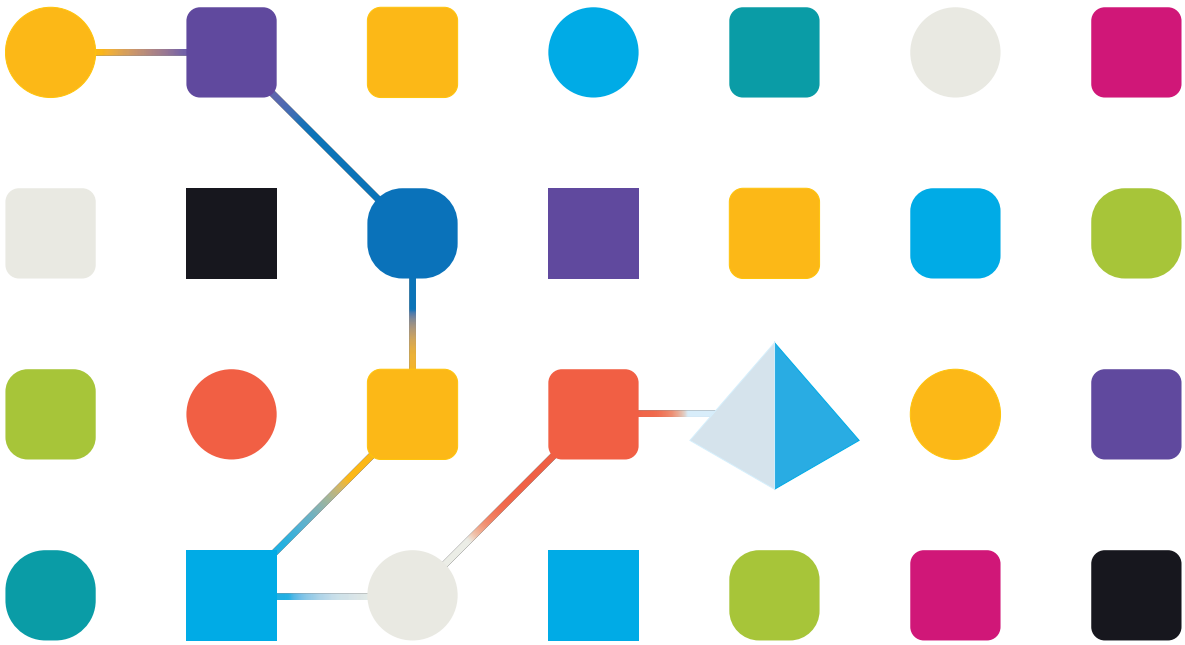
Hub 4.2

User Guide

Document Revision: 2.1



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

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.

Hub 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.

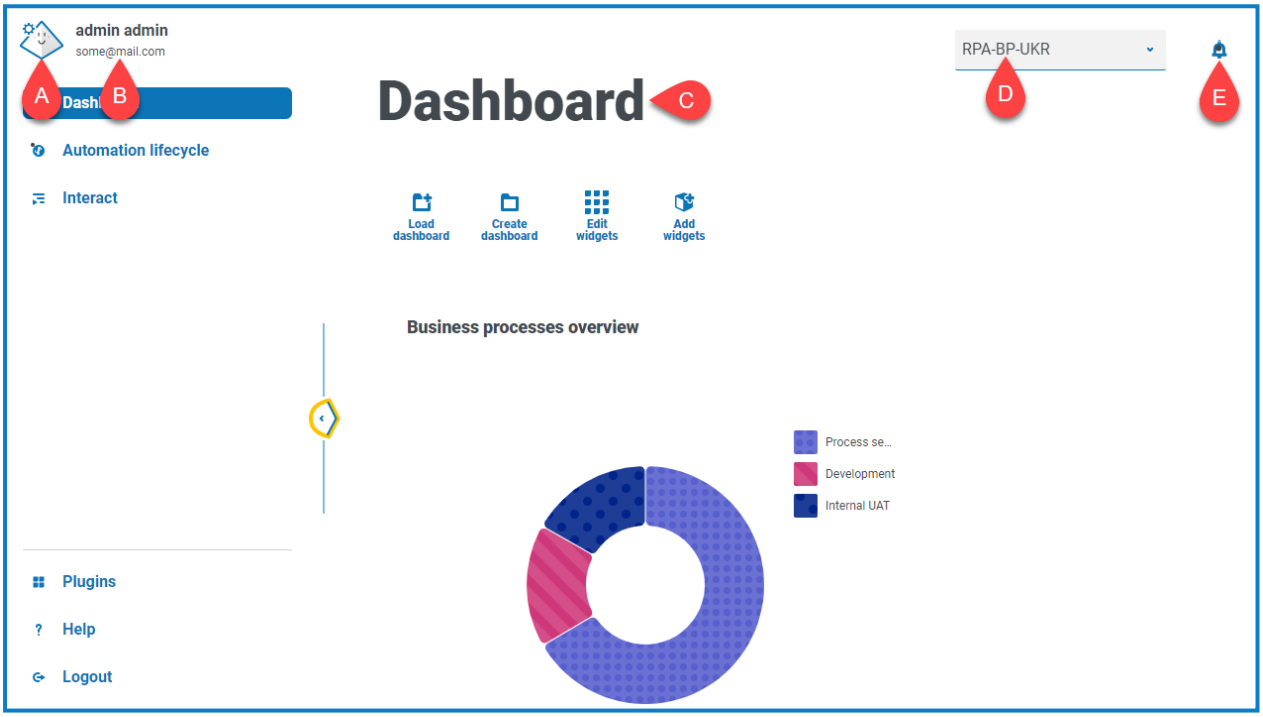
Administration and configuration

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.

The top navigation bar in Hub provides access to the system settings. The settings that are available depend upon the user role. There are a number of settings which are not available to users without administrator capabilities enabled on their account, as detailed below.

The features on the top navigation bar include:



When the navigation menu on the left is expanded (as shown above), these features are shown:

A. **Profile icon** - Defined by the user in their profile. If you are:
   - A user, this provides a link to your profile page.
   - An administrator, this provides a link to the system settings from which the following can be controlled:
     - Personal profile and audit.
     - Platform management.
     - User management.

B. **User information** - This is hidden when the navigation menu is collapsed.

C. **Page title** - The area of the Hub user interface you are currently using.

D. **Environment** - The currently selected environment. Environments are set up in the environment manager and can be selected here.

E. **Notification alerts** - Notifications are created by the Automation Lifecycle Management plugin. Only notifications that you are authorized to see, or that are applicable to you, will show when you click the alert.

Hub restrictions

The following table list the restrictions enforced when using Hub.

Item	Restriction	Related sections
Password Restrictions	Passwords must: • Contain at least 1 upper-case • Contain at least 1 number • Contain at least 1 special character • Be at least 8 characters in length • Be no longer than 32 characters	Profile on page 9 and Users on page 19
Profile Image	Less than 1MB and no greater than 1920 x 1080 pixels	Profile on page 9
Dashboard Widgets	Limited to 20 widgets per dashboard	Dashboards on page 31
Brand Logo	PNG, JPEG or JPG no greater than 30KB	Customization on page 15

Settings

The Settings page enables you to manage Hub. You only have access to the Settings page if you are an administrator. If you are a user, you will only have access to the Profile page which opens when you click your profile icon.

> To open the Settings page, click your profile icon. The Settings page displays if you are an administrator. The Profile page displays if you are a user.

Overview

Profile	The Profile page enables you to change your information, display preferences and your password. For more information, see Profile on page 9.
Audit	Administrators can view a history of audited system activities. For more information, see Audit on page 10.

Platform management

> The email and database settings are defined as part of the Hub installation and configuration process, see the Hub installation guide. These are essential for normal operation.

Environment management	Administrators can add connections to Blue Prism RPA databases, manage existing connections and delete redundant RPA databases. For more information, see Environment management on page 11.
Email configuration	Administrators can change the SMTP host details. Changes should be made in conjunction with your own IT Support team to ensure that the configuration and credentials match your organization's email server. For more information, see Email configuration on page 14.
Customization	Administrators can customize the theme used by the Interact user interface. The theme allows the administrator to set the theme name, brand color and brand logo. For more information, see Customization on page 15.
Plugin management	Administrators can view the currently installed plugins description and version number. Any updates or additional available plugins are also shown. For more information, see Plugin management on page 17.

User management

Users	Administrators can add, modify or retire users, and assign their access permissions and roles. For more information, see Users on page 19.
Roles and permissions	Administrations can add, edit, and delete roles. For more information, see Roles and permissions on page 23.
Registrations	Administrators can manage registration requests that new users have raised for

	access to Interact. For more information, see Registrations on page 26.
Authentication settings	Administrators can enable, disable, and configure authentication settings. For more information, see Authentication settings on page 27.

Profile

Profile settings allow you to change your information and Hub viewing preference. You can change:

- Your password.
- Your profile first and last names.
- Your email address.
- Your profile picture - this displays in the profile icon. This image will only be used in Hub.
- Your Hub display theme - dark or light.

You cannot change your username.

To open the Profile page, click your profile icon to open the Settings page, and then click **Profile**. click your profile icon and the Profile page displays.

Change your profile

1. On the Profile page, click **Edit**.

   The Profile page becomes editable, indicated by the **Edit** button changing to a **Cancel** button and the fields becoming editable.
2. Update the following as required:
   - Update your first name, last name or email address.
   - Toggle the **Dark theme** on or off. By default, Hub is displayed in the light theme.
   - Click **Upload** to select your profile image. The image will be displayed within the prism icon. Images cannot be greater than 1 MB in size.
3. Click **Save** to save your changes. If you do not want to save your changes, click **Cancel**.

   The **Save** button will only become active once you have made a change to the theme setting.

Change your password

1. On the Profile page, click **Update password**.

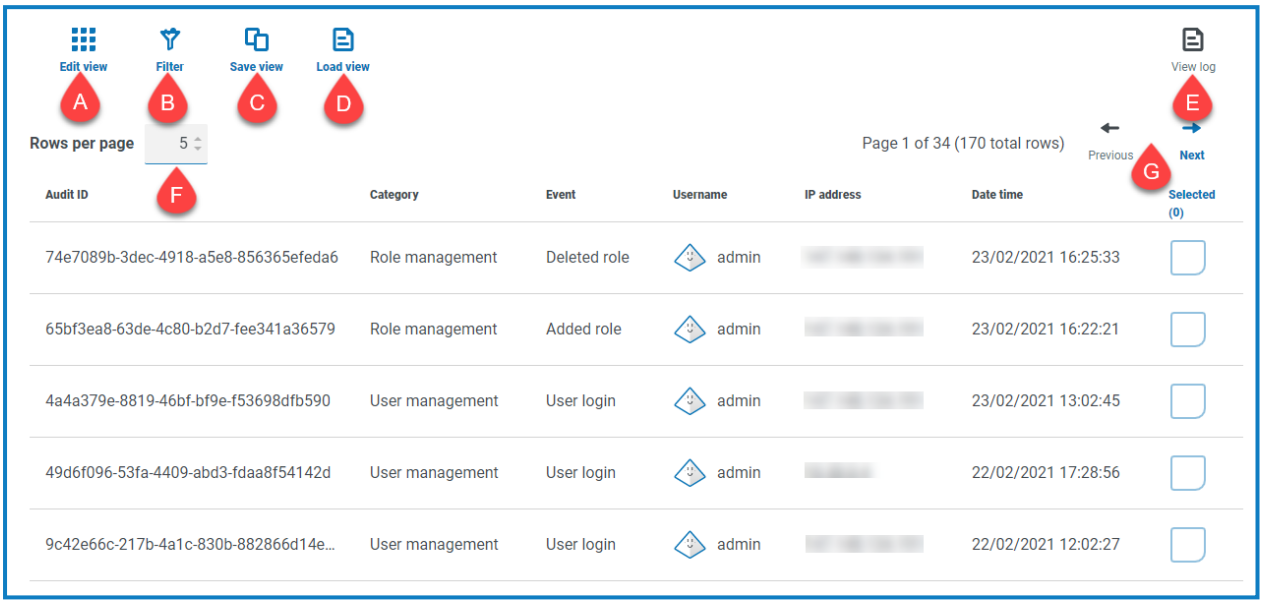
   The Update your password dialog displays.
2. Enter your current password.
3. Enter and repeat your new password.
4. Click **Update**.

   Your password is changed.

Audit

Audit enables you to view audited system activities. This area is only available if you are an administrator.

To open the Audit page, click your profile icon to open the Settings page, and then click **Audit**.



The Audit page provides you with the following information and functions:

A. **Edit view** - Define the columns that are displayed. You can then show or hide the columns using the toggle switches.

B. **Filter** - Filter the information that is displayed. You can turn on the required filters and enter or select the appropriate information for display, for example, you could turn on the **Category** filter and select **User management**.

C. **Save view** - Save your current column settings. You can enter a name for your view to make it easily identifiable when loading views.

D. **Load view** - Load a saved view. You can select the required view and click **Apply**.

E. **View log** - View the details of an audit item.

F. **Rows per page** - Enter a number, or use the up and down arrows, to change the number of rows seen on a page.

G. **Previous and Next** - Click **Previous** or **Next** to move through the pages of audit items.

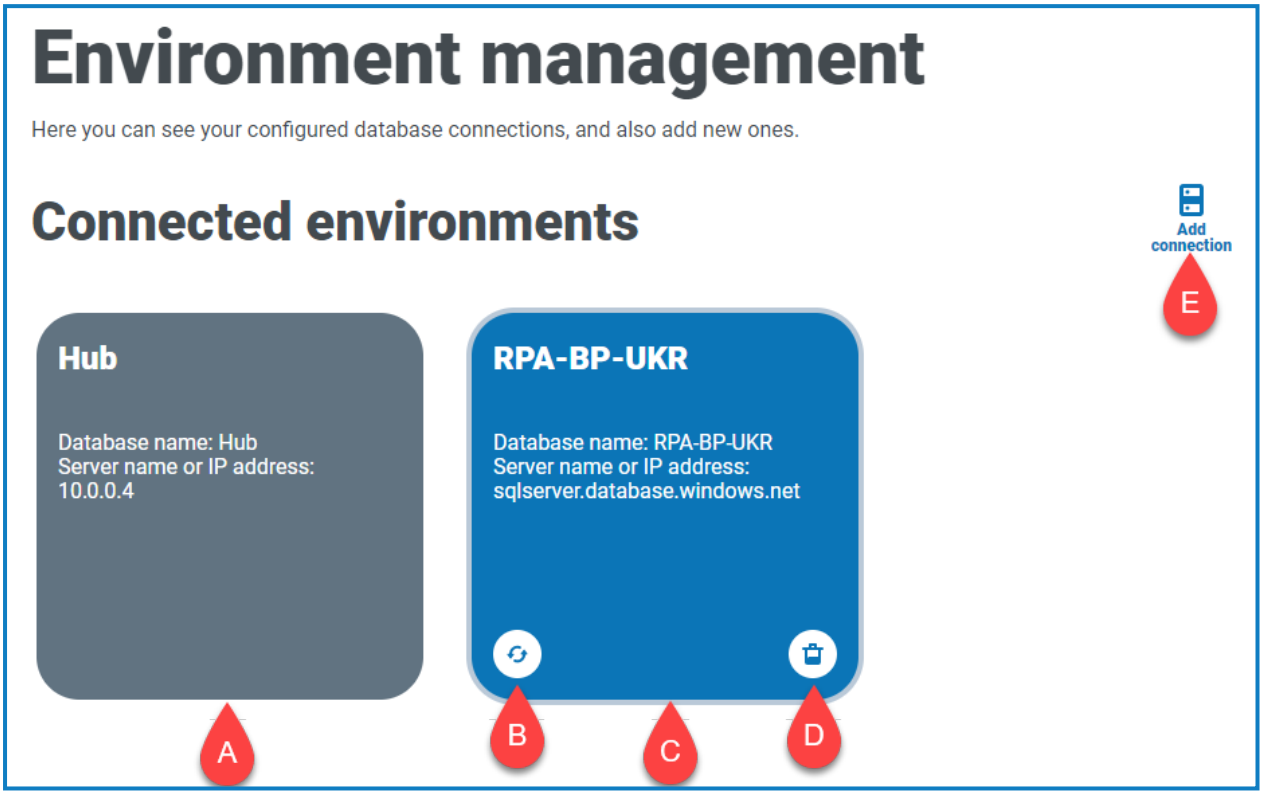
View an item

1. On the Audit page, select the check box for the item you want to view.
2. Click **View log**.

   The details of the event displays.

Environment management

The environment manager displays your connected databases. This area is only available if you are an administrator.



By default, you will see the database for Hub (A) and the RPA database that was configured as part of the initial installation process (C).

You can add (E) or modify database connections using the environment manager. If any connections are added or changed, you need to click the refresh icon (B) on the database tile to bring the details of the digital workforce and queues across to Hub. If this is not done, you will not be able to see the Digital Workers or queues in that particular RPA environment.

You can also delete (D) redundant database connections.

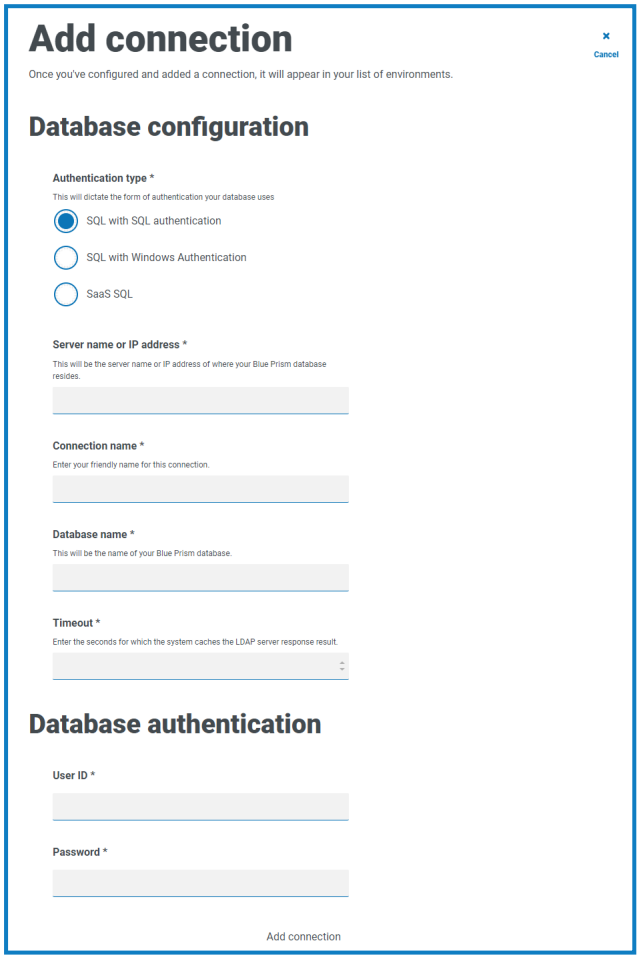
> To open the Environment manager, click your profile icon to open the Settings page, and then click **Environment management**.

Add a Blue Prism database connection

1. On the Environment manager page, click **Add connection** to add an additional RPA database connection.

   The Add connection page displays.

2. Enter the database connection configuration parameters.



   When all the fields are complete, the **Add connection** link is available.

   > ⚠ You must ensure that your database password does not contain an equals sign (=), semi-colon (;), or speech marks ("). These characters are not supported, and will lead to issues when trying to connect to the database.

3. Click **Add connection** to save the details.

   The connection is created and displayed in the environment manager.

4. In the Environment manager, click the refresh icon on your new connection. This updates the information in Hub with the digital workforce and queues held in the database.

Edit database details

You can only change the user name and password on a database connection.

1. On the Environment manager page, double-click the database you want to change.
2. Modify the information as needed.

   ⚠ You must ensure that your database password does not contain an equals sign (=), semi-colon (;), or speech marks ("). These characters are not supported, and will lead to issues when trying to connect to the database.

3. Click **Save** to save the details.
4. In the Environment manager, click the refresh icon on your updated connection. This updates the information in Hub with the digital workforce and queues held in the database.

Delete a database connection

You can delete a connection to a database only if there are no dependencies on that database. You will not be able to delete a database if:

- Interact forms are dependent on a queue within that RPA database, for example, submitting a form to a queue.
- The ALM process definitions use objects defined within that RPA database.

You must amend the forms or process definitions to point at an alternative database to remove the dependance.

The delete function allows you to remove any databases that have accidentally been added and are not in use, for example, if the wrong database information has been added during configuration.

To delete an RPA database:

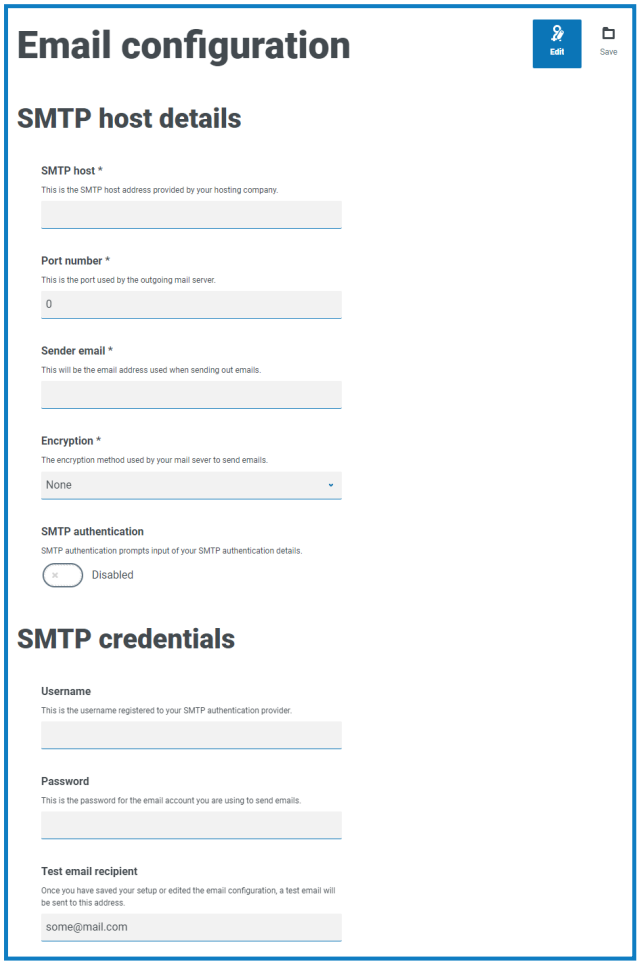
1. On the Environment manager page, click the delete icon on the database tile.

   If there are no dependencies, a message displays asking you to confirm the deletion. If there are dependencies, an error message displays in the top right corner of the Hub user interface.

2. Click **Yes** to confirm the deletion.

Email configuration

Email settings allows you to change the configuration of SMTP and configure email for notifications, such as password reset requests from users. This area is only available if you are an administrator. Changes should be done in conjunction with your own IT Support team to ensure that the configuration and credentials match your organization's email server.



The following information is required:

- SMTP host
- Port
- Sender email
- Encryption method
- Username
- Password
- Email address to receive a test email - this defaults to the email address of the user who is making the changes.

Whenever you save the SMTP settings, a test email is sent to you to ensure the setup is correct. If you don't receive a test email after saving the changes, check the details and update accordingly.

> To open the Email configuration page, click your profile icon to open the Settings page, and then click **Email configuration**.

Update the email settings

The email settings are entered as part of the initial configuration of Hub. You only need to change these settings in the event of an IT infrastructure change, such as a different SMTP host, or a change to the existing host which affects these settings.

1. On the Email configuration page, click **Edit**.
2. Enter the required information.
3. Click **Save** to save your changes.

Customization

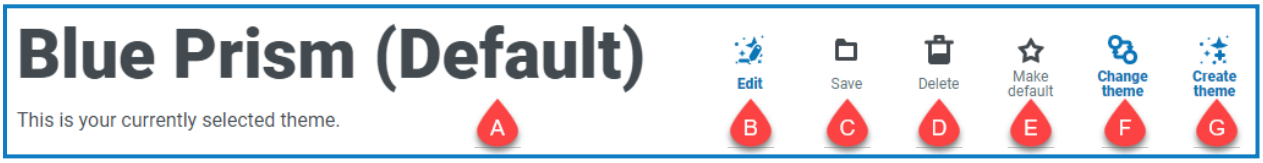
Customization settings allow you to change the appearance of the Interact user interface. This area is only available if you are an administrator. You can create themes that control the following:

- **Theme name** - This is also the brand name that will appear on the user interface.
- **Brand color** - This is the color that will be used by buttons and labels in the user interface.
- **Brand logo** - This is an image that will be used as the logo on the user interface.

You can create multiple themes which can be applied dependent upon the user, providing a different look and feel depending on who logs in. The default theme is automatically selected when creating a user, however, this can be changed.

> To open the Customization page, click your profile icon to open the Settings page, and then click **Customization**.

When you open the Customization page, the default theme displays:



This provides you with the following information and functions:

A. Name of the currently displayed theme.
B. Edit - Edit the theme that is currently displayed.
C. Save - Save any changes you have made. This icon is only active when you are editing a theme.
D. Delete - Delete the currently displayed theme. This icon is only active if you have more than one theme.
E. Make default - Set the currently displayed theme to be the default for the system. This icon is only active if the current theme is not the default.
F. Change theme - Select which theme you want to display on the page.
G. Create theme - Create a new theme.

Edit and save a theme

1. On the Customization page, click **Edit theme**.

   The Theme page becomes editable, indicated by the **Edit theme** button changing to a **Cancel** button and the **Reset** buttons becoming active.

2. If required, change the theme **Name**.

   As you type, the *Create theme* title also changes.

3. If required, change the **Primary color** by clicking the color bar. You can:
   - Select a color using the sliding bar.
   - Enter a value using the text boxes. You can click on the ⇕ icon to toggle between the different types; RGB, HSL or Hex.

4. If required, click **Upload** to change the logo to a file of your choice.

5. Click **Save** to save your changes. If you do not want to save your changes, click **Cancel**.

   The **Save** button will only become active once you have made a change to theme setting.

Delete a theme

1. With the theme you want to delete shown on the screen (see Change the theme below), click **Delete**.

   A message displays asking you to confirm the deletion.
2. Click **Yes** to delete the theme.

Set a new default theme

1. With the theme you want to use shown on the screen (see Change the theme below), click **Make default**.

   (Default) appears next to the theme name and a notification appears confirming the change. The theme change will be seen in Interact.

Change the theme

The **Change Theme** icon changes the theme that you are currently viewing. If you want to make changes to the theme itself, you need to edit the theme.

1. On the Customization page, click **Change theme**.

   A list of available themes displays.
2. Click the theme you want to view.

   The selected theme displays.
3. Close the list to return to the main tools.

Create a new theme

1. On the Customization page, click **Create theme**.

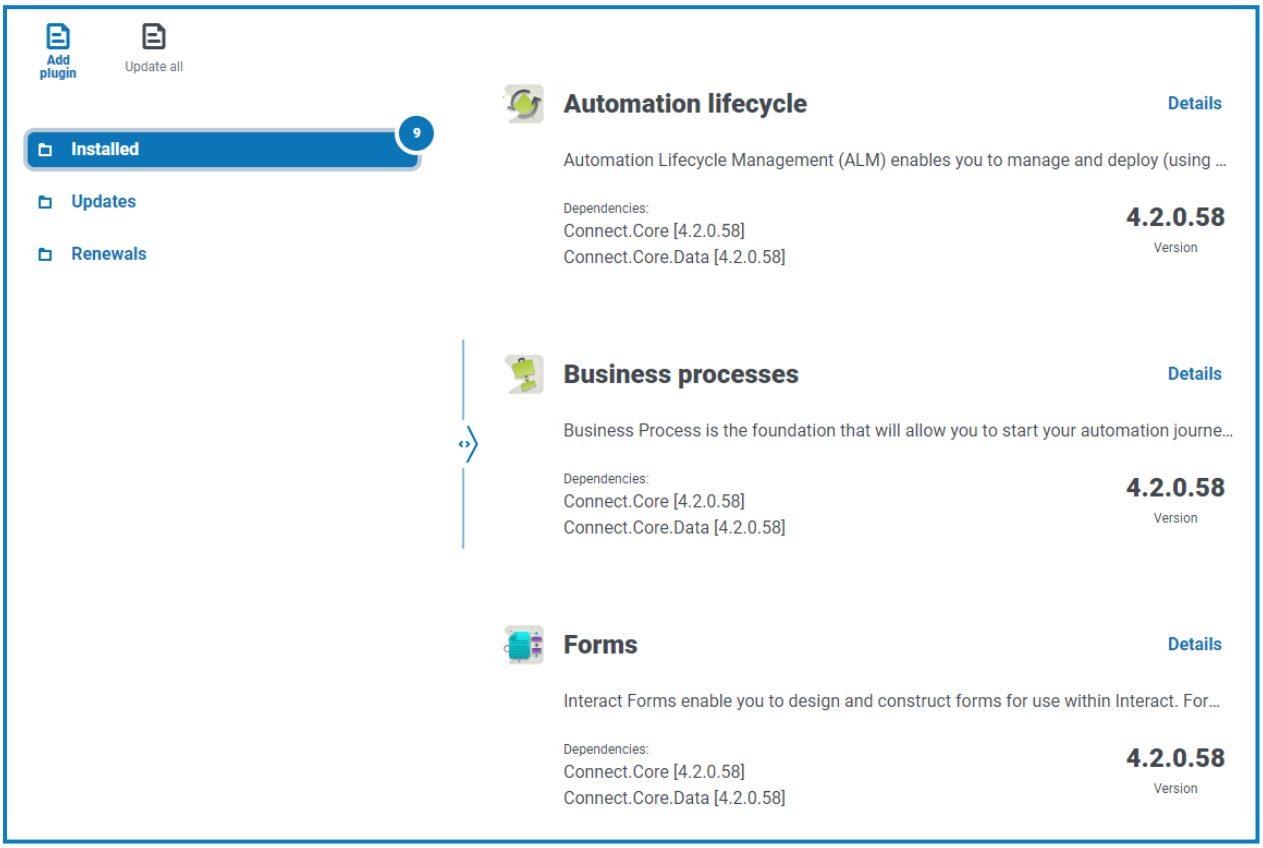
   The Create theme page displays.
2. Enter the theme **Name**.

   As you type, the *Create theme* title also changes.
3. Click the **Primary color** bar to change the color. You can:
   - Select a color using the sliding bar.
   - Enter a value using the text boxes. You can click on the icon to toggle between the different types; RGB, HSL or Hex.
4. Click **Upload** to change the logo to a file of your choice.
5. Click **Create theme** to save your new theme.

Plugin management

Plugin management displays the details of the installed plugins, some of these are available by default during the installation process. You can manage your existing plugs, update them and add new plugins. This area is only available if you are an administrator.

Plugins are the heart of Hub and are self-contained features that can be individually installed and customized to provide information about your automated processes. Some plugins also provide development tools to assist in the building of automations.



To open the Plugin management page, click your profile icon to open the Settings page, and then click **Plugin management**.

View installed plugins

When you open Plugin management, the currently installed plugins are displayed. The plugin name, an extract from the description and the version numbers are shown. To view:

- More information about a plugin, click **Details**.
- Information about any updates, click **Updates**. Note that this feature is not currently available for Hub on-premises.
- Information about any upcoming or pending license renewals, click **Renewals**. If any plugins require a license renewal, a number is shown next to the **Renewals** link showing the number of updates. If no number is shown, there are no renewals.

Add a plugin

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

1. On the Plugin management page, click **Add plugin**.

   The Open dialog displays to enable you to find a local file.

2. Navigate to, and select, the plugin file and click **Open**.

   The plugin file uploads and installs. The website automatically restarts to complete the installation.

Update plugins

When an update is available, a number appears next to the **Updates** link.

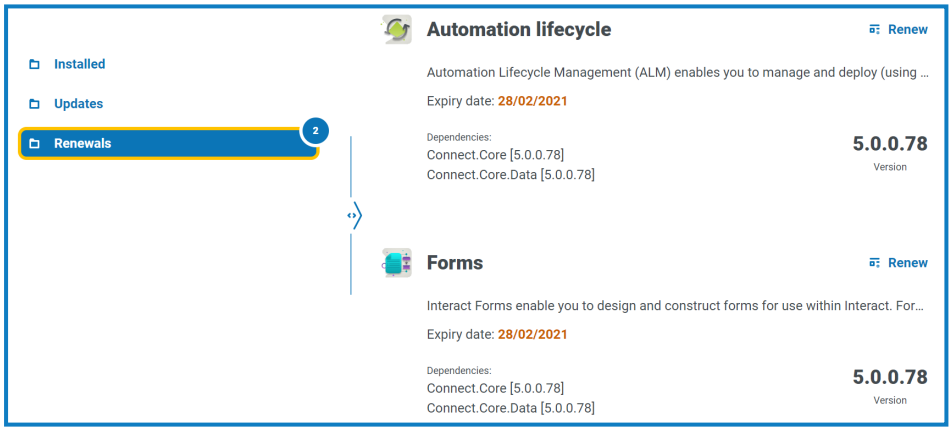
This functionality is not currently available for Hub on-premises installations.

Renew plugins

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

1. On the Plugin management page, click **Renewals**.

   The expiring plugins display.

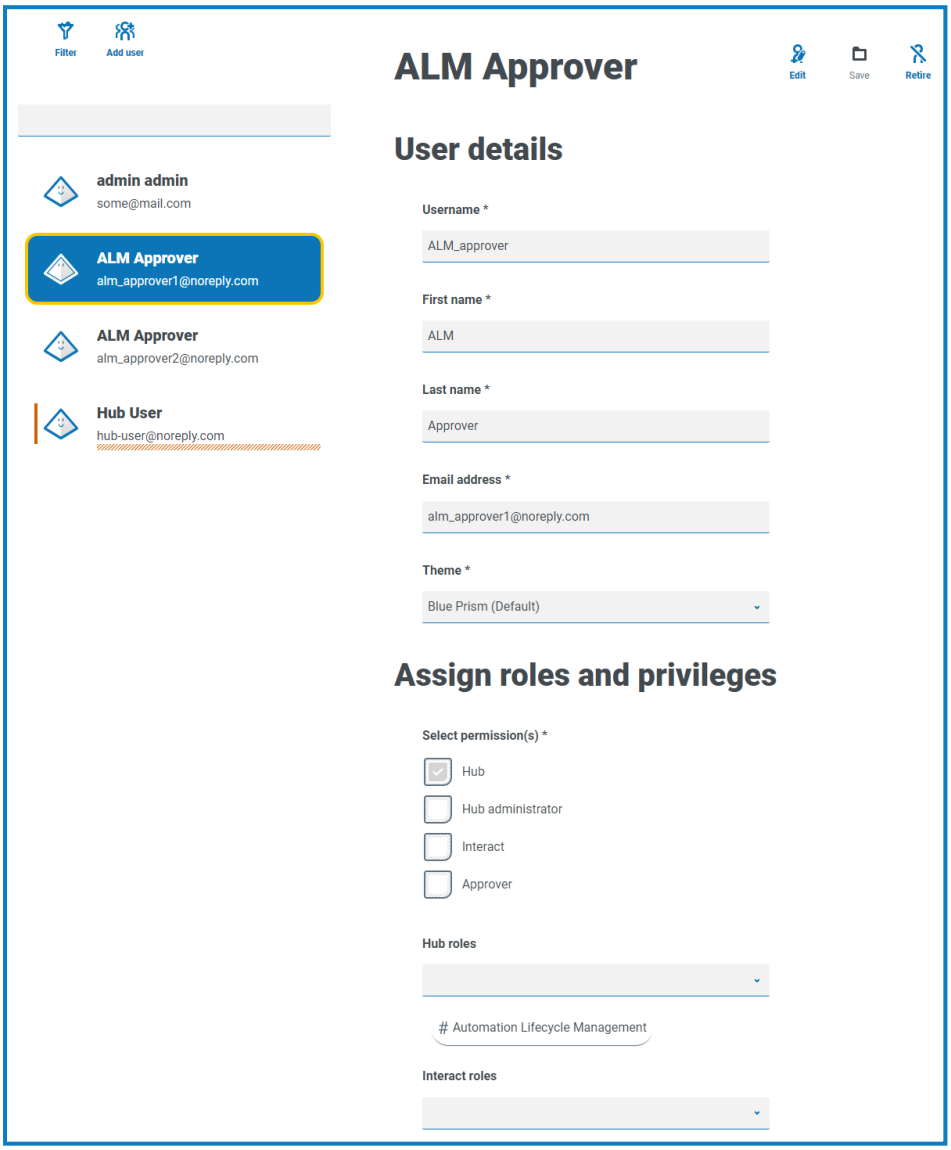


2. Click **Renew** next to the required plugin.
3. Upload a valid license and click **Finish** to apply.

Users

User settings allow you to add, edit, and retire users accounts in the system. You are also able to set the user's access to Hub and Interact and their roles within these. Before you configure users, it is recommended that user roles are configured.

The Users page displays a list of existing users. You can click on a user to view their information. If only native authentication has been configured in your environment, the Authentication type field is hidden.



To open the Users page, click your profile icon to open the Settings page, and then click **Users**.

Find users

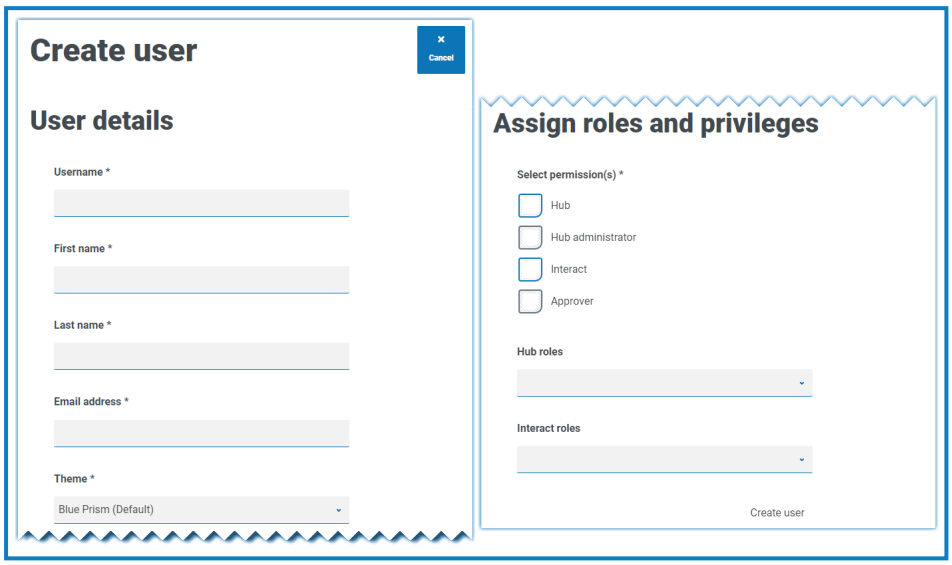
The Users page includes two methods for finding users:

- **Search field** - This is located above the list of users. Start typing a user's name to filter the search results, the list dynamically filters as you enter more characters.
- **Filters** - The filters enable you to easily find a specific user or types of users based on the selected criteria. Click **Filter** to view and use the filters.

Add users

1. On the Users page, click **Add user**.

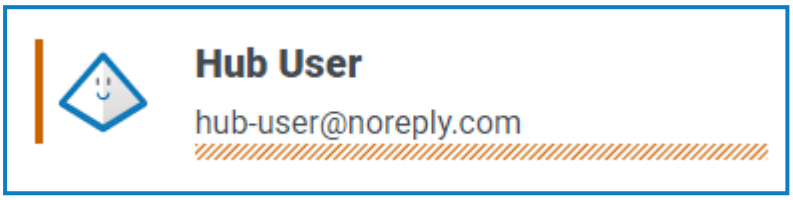
   The Create user section displays.



2. Enter the user's details:
   - **Username**
   - **First name**
   - **Last name**
   - **Email address**
   - **Theme** - The default theme is automatically selected. You can select a different theme for the user. See Customization on page 15 for more information about themes.
3. Select the permissions for the user:
   - **Hub** - Select this check box for standard Hub users and administrators.
   - **Hub administrator** - Select this check box to give administrator permissions to the user role. You must select **Hub** before this option becomes available.
   - **Interact** - Select this check box to enable the user to be assigned Interact Forms. See the Interact user guide for more information.
   - **Approver** - Select this check box to give approval rights for Interact to the user role. You must select **Interact** before this option becomes available.

4. Select the roles for the user:
   - **Hub roles** - Select the Hub roles required for the user. If the required role has not yet been created, you can edit the user at a later date to assign new roles.

     If the user is created without a Hub role, the user is underlined in the user list to indicate that the user setup has not been completed, for example:

     The user will be able to log in to Hub, but they will not be able to perform any tasks as they will not have access to any plugins.
   - **Interact roles** - Select the Interact roles required for the user. If the required role has not yet been created, you can edit the user at a later date to assign new roles. You can select more than one role.

   Users can also be added to roles from the Roles and Permissions page.

5. Click **Create user**.

   The Create password dialog displays.
6. Select one of the password options:
   - **Send the user a password update email** - This sends the user an email prompting them to enter a password on login using a link.
   - **Manually update the user's password** - This enables you to set a password for the user.

   Passwords must obey the restrictions within Hub. For more information, see Hub restrictions on page 6.

7. Click **Continue** and follow the instructions on screen.
8. Finally, click **Create** to create the user.

The new user displays in the list of users.

Edit users

1. On the Users page, select the required user and click **Edit**.
2. Change the information as required.

   You cannot change their username.

3. Click **Save** to apply your changes.

Retire users

1. On the Users page, select the required user and click **Retire**.

   A message displays asking you to confirm.

   You can use the **Live** filter to filter the user list for retired users. See Find users on page 19.

2. Click **Yes**.

   The user is retired and the **Retire** icon is replaced with the **Make live** icon. You can use this to reinstate the user if required. The user is also underlined in the user list to indicate they are retired.

Unlock users

If a user enters their password incorrectly five times, they will be locked out of the system for three hours. Alternatively, you can unlock their account for them.

1. On the Users page, select the required user and click **Unlock**.

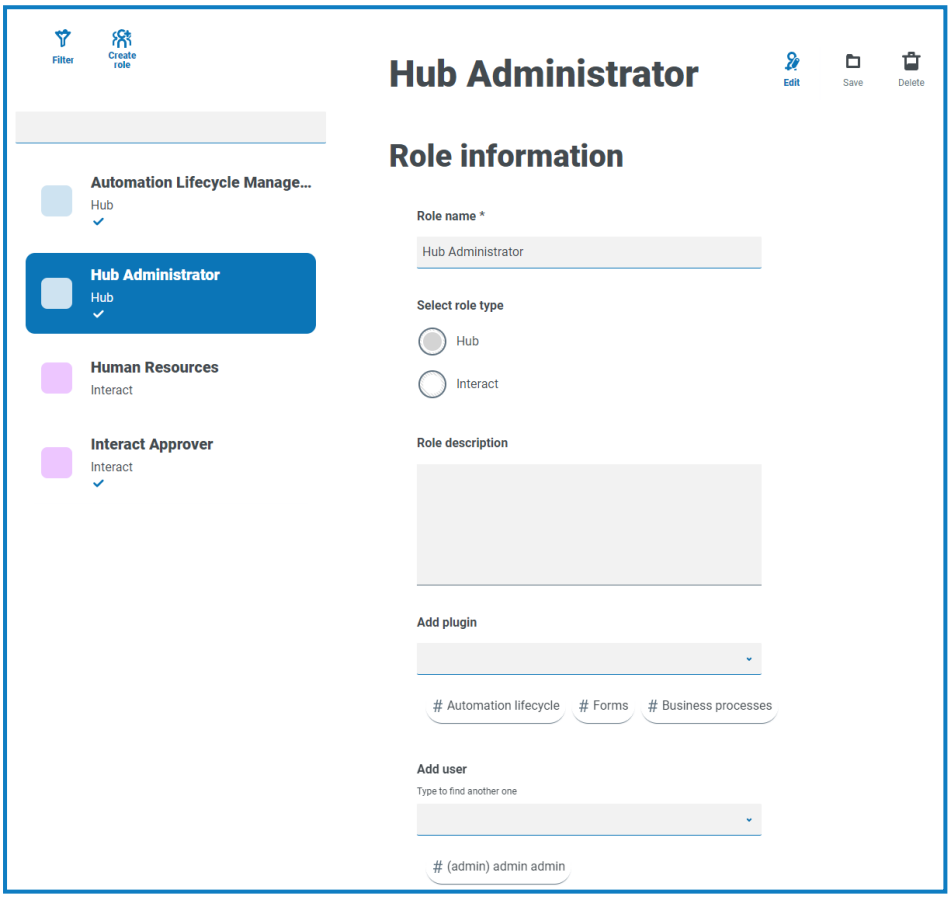
   A notification message displays confirming the user has been successfully unlocked.

   You can use the **Locked** filter to filter the user list for locked users. See Find users on page 19.

Roles and permissions

Roles and permissions allow you to create roles and assign permissions to specific areas of Hub or Interact to these roles. This area is only available if you are an administrator. Before you configure users, it is recommended that user roles are configured. If roles are not configured, users will be able to log on but, without a role assigned, they will get a limited display and no access to features or functionality.

The Roles and permissions page displays a list of existing roles. There are predefined roles automatically created as part of the Hub installation process. These are indicated by a blue tick, for example, the Hub Administrator role. These automatically created predefined roles are locked and cannot be changed or deleted, although you can add users to them. You can click on a role to view the permissions.



To open the Roles and permissions page, click your profile icon to open the Settings page, and then click **Roles and permissions**.

Find roles

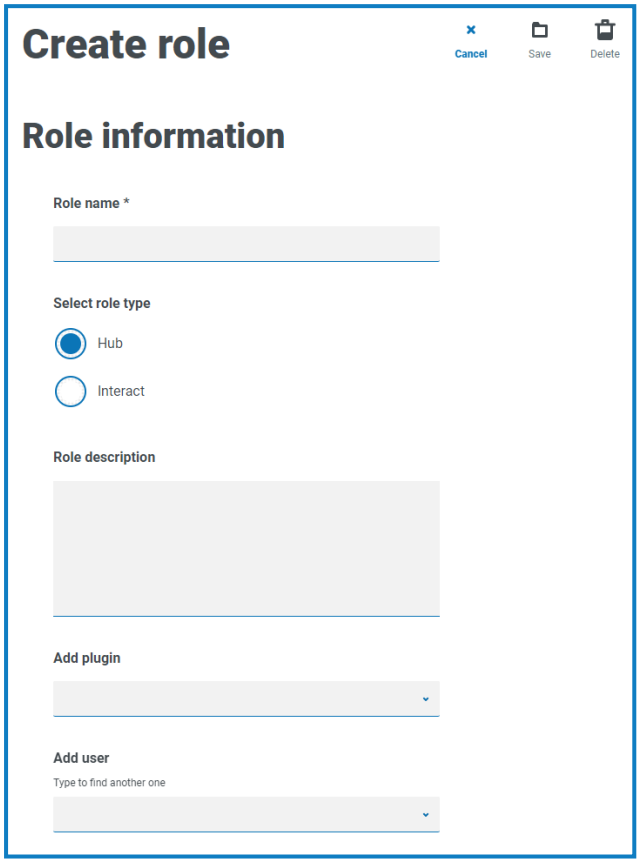
The Roles and permissions page includes two methods for finding roles:

- **Search field** - This is located above the list of roles. Start typing the name of a role to filter the search results, the list dynamically filters as you enter more characters.
- **Filters** - The filters enable you to easily find a specific role or roles with specific permissions based on the selected criteria. Click **Filter** to view and use the filters.

Add roles

1. On the Roles and permissions page, click **Create role**.

   The Create role section displays.



2. Enter a role name and select whether it applies to **Hub** or **Interact**.
3. If required, enter a description.
4. Select the items that you want the role to have access to. If you have selected:
   - **Hub**, select the required plugins from the **Add plugin** drop-down list.
   - **Interact**, select the required forms from the **Add forms** drop-down list.

   You can select more than one item from the list.
5. Select the users that will be assigned this role from the **Add user** drop-down list. The list only displays users who have appropriate privileges, for example, if the role is for Interact, it will only display Interact users and not Hub users. See Users on page 19 for more information on user permissions.

   > Users can also be added to roles from the Users page.

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

Edit roles

1. On the Roles and permissions page, select the required role and click **Edit**.
2. Change the information as required.

   You cannot change the role type. If you are editing a role that displays a blue tick, you can only amend the users assigned to the role.

3. Click **Save** to apply your changes

Delete roles

You cannot delete a role that displays a blue tick. This is a role that was automatically created when installing Hub or a plugin.

1. On the Roles and permissions page, select the required role and click **Delete**.

   A message displays asking you to confirm.

2. Click **Yes**.

   The role is deleted and a confirmation notification displays.

Registrations

The Registrations page enables you to manage registration requests that new users have raised for access to Interact. This area is only available if you are an administrator.

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

The Registrations page displays the submitted registration requests, which you can approve or deny.

> To open the Registrations page, click your profile icon to open the Settings page, and then click **Registrations** . A numerical value is shown against the Registrations option on the Settings page if there are outstanding requests.

Approve a request

The user will need to be assigned a role before they will be able to access any forms in Interact. You can either do this as part of the approval process, as shown below, or you can approve the request and then edit the user.

1. On the Registrations page, select the user and click **Edit**.
2. Select the required role from the drop-down list. This is the only field you can edit.
3. Click **Save**.
4. Click **Approve**.

   The user is removed from the registrations list and displays on the User page. The user receives an email providing a one-time use link to complete registration by entering a password and they can then access Interact.

Reject a request

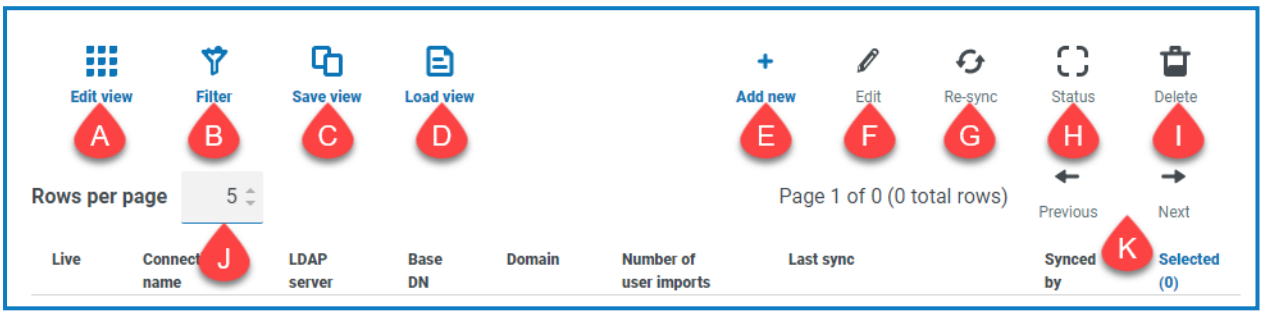
1. On the Registrations page, select the user and click **Deny**.

   The access request is rejected and the user details are removed from the list.

Authentication settings

Authentication settings allows you to the configure a Lightweight Directory Access Protocol (LDAP) connection to an organization's Active Directory environment. This area is only available if you are an administrator.

To open the Authentication settings page, click your profile icon to open the Settings page, and then click **Authentication settings**.



The Authentication settings page provides you with the following information and functions:

A. **Edit view** - Define the columns that are displayed. You can then show or hide the columns using the toggle switches.

B. **Filter** - Filter the information that is displayed. You can turn on the required filters and enter or select the appropriate information for display, for example, you could turn on the **Domain** filter and enter the domain name.

C. **Save view** - Save your current column settings. You can enter a name for your view to make it easily identifiable when loading views.

D. **Load view** - Load a saved view. You can select the required view and click **Apply**.

E. **Add new** - Add a new connection.

F. **Edit** - Edit the selected connection details.

G. **Re-sync** - Re-sync the users with Hub. You need to do this if new users are added to Active Directory.

H. **Status** - This icon changes when you select a connection based on the status of the connection.

I. **Delete** - Delete the selected connection. You can only delete a retired connection.

J. **Rows per page** - Enter a number, or use the up and down arrows, to change the number of rows seen on a page.

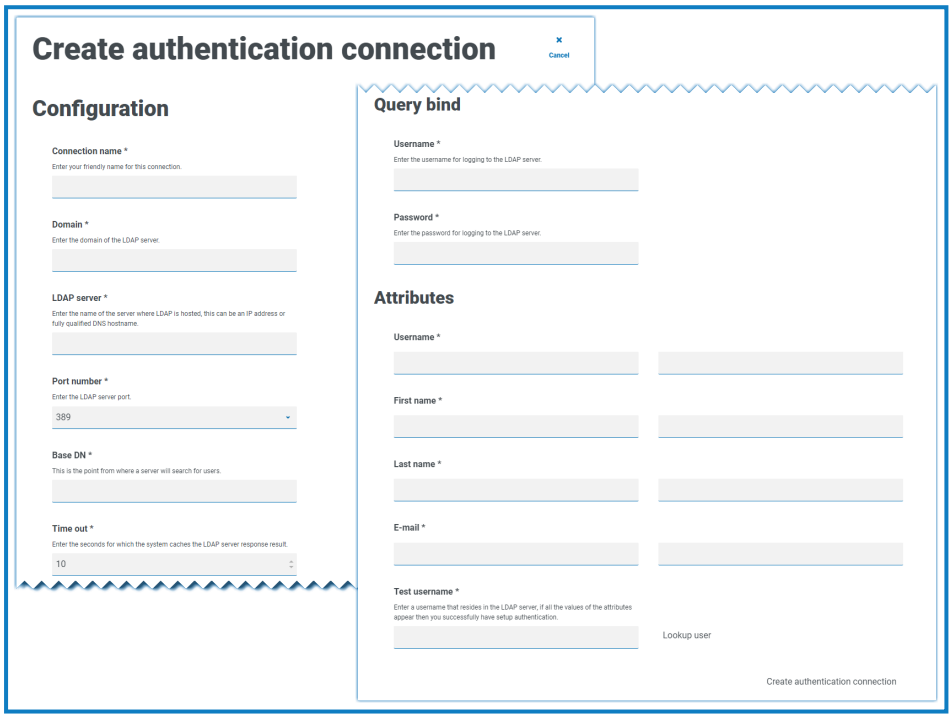
K. **Previous and Next** - Click **Previous** or **Next** to move through the pages.

Add a new connection

> If you add more than one LDAP connection into Hub which contain the same users (such as name, email address, and domain), duplicate users will be created which could lead to login issues. When synchronizing the users in the procedure described below, ensure that you only select the users that you require to prevent duplicate users from being imported.

1. On the Authentication settings page, click **Add new**.

   The Create authentication connection page displays.



2. Complete the Configuration fields:
   - **Connection Name** - A name that you want the connection to be known as.
   - **Domain** - The name of the domain you are connecting to, for example “bp”.

     > Do not use the fully qualified domain name (FQDN) of your domain. You must use the short name format.

   - **LDAP Server** - The hostname of the LDAP server, for example blueprism-srv1.local.
   - **Port Number** - The port number it operates on, by default this is port 389.
   - **Base DN** - The starting point within the Active Directory where the system begins to look for users, for example dc=blueprism, dc=local.
3. Complete the Query Bind fields:
   - **Time Out** - The timeout period in seconds that the system will wait to get a response from the Active Directory server.
   - **Query Bind Username** - An Active Directory user that has access to the organization’s LDAP system.
   - **Query Bind Password** - The password for the Active Directory user.

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 the **Test Username** field 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 **Create authentication connection**.

   A notification message displays confirming the connection is successful and you are prompted to import users.
7. Click **Yes** to synchronize now. Alternatively, you can select **No** and synchronize later using the process in Synchronize Active Directory users on the next page.

   A message displays indicating the number of users found.
8. Click **Proceed**.

   A list of users display. These have not yet been imported to Hub as you need to configure the permissions and roles for the required users.
9. Select a user to import and assign the appropriate Hub roles and/or 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.
11. Click **Save access and roles**.

    Only the users that have had their roles and permissions defined are saved and the Users page displays with the new users shown.

Edit a connection

1. On the Authentication settings page, select the check box for the required connection.
2. Click **Edit**.
3. Edit the information as required. You can not change the domain, LDAP server, port number or base DN.
4. Click **Save**.

Synchronize Active Directory users

When additional users are added to Active Directory, those users must be synchronized with Hub.

1. On the Authentication settings page, select the check box for the required connection.
2. Click **Re-Sync**.
3. Select the required user to add to the Hub user base, assigning the appropriate Hub roles and/or any Interact responsibilities.
4. Repeat for all required users.
5. Click **Save access and roles**.

   Only the users that have had their roles and permissions defined are saved and the Users page displays with the new users shown.

Retire and reinstate a connection

> Retiring a connection does not affect the status of the associated users - users can still log in and use the applications. All users associated with an LDAP connection can be retired by deleting the connection.

1. On the Authentication settings page, select the check box for the required connection.

   If the connection is:

   - Live, the **Status** icon displays as **Retire**.
   - Retired, the **Status** icon displays as **Make Live**.
2. To retire a connection:
   a. Click **Retire**.

      A message displays asking you to confirm.

   b. Click **Yes**.

      The connection is retired and **Retire** changes to **Make Live**.
3. To make a retired connection live, click **Make Live**.

   The connection is instantly reinstated and **Make Live** changes to **Retire**.

   > You can use the **Live** filter to filter the list for retired connections.

Delete a connection

You can only delete a retired connection.

1. On the Authentication settings page, select the check box for the required connection.
2. Click **Delete**.

   A message displays asking you to confirm.
3. Click **Yes**.

   The connection is deleted and all users associated with it are retired.

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

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. On the Dashboard page, click **Create dashboard**.
2. Enter a name and a description for the dashboard.
3. Click **Save**.

   A notification message displays confirming the dashboard has been created. You are now ready to add widgets to your dashboard.

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 **Add widgets** to display a list of available widgets.
2. To view more details about a widget, click its information button.

   Information about the widget displays, for example:

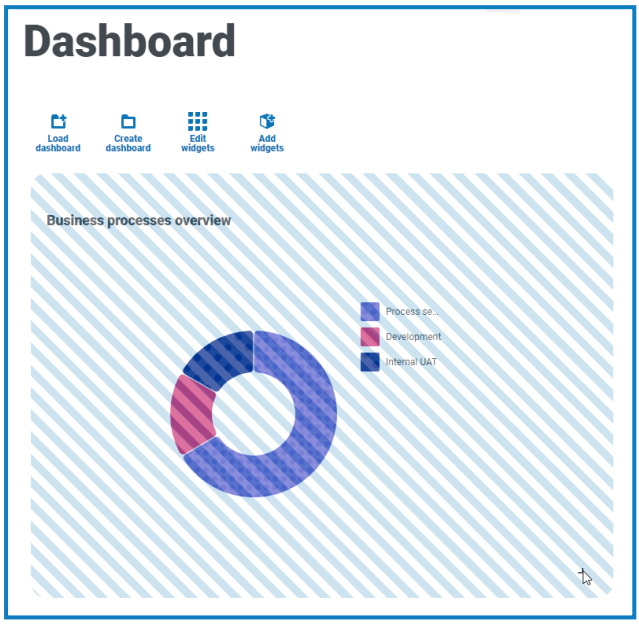
   Click **Cancel** to close the details window.
3. Click the widget name to add it to the dashboard.

   The widget appears on the dashboard and a success message is displayed.

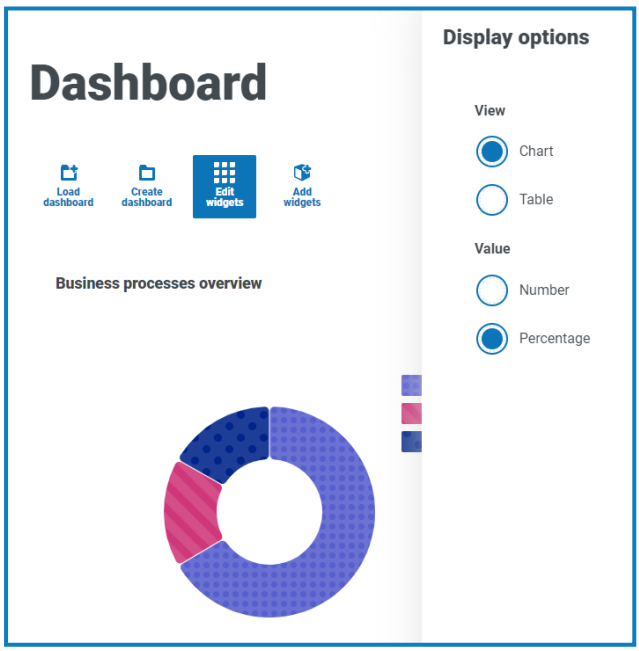
Configure widgets

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. Click **Edit widgets** and click **Options** next to the required plugin.



Remove a widget

1. Click **Edit widgets**.
2. Click **Remove** on the required widget.

   The widget is removed from the dashboard.

Change the displayed dashboard

1. On the Dashboard page, click **Load dashboard**.

   A list of available dashboards displays.
2. Click the required dashboard.

   The Dashboard page refreshes with the selected dashboard.

Delete a dashboard

1. On the Dashboard page, click **Load dashboard**.

   A list of available dashboards displays.
2. Click the delete icon against the required dashboard.

   A message displays asking you to confirm.
3. Click **Yes** to delete the dashboard.

   A notification message displays confirming the dashboard has been deleted.

Automation Lifecycle Management plugin

The Automation Lifecycle Management plugin is an optional service that requires an additional license key to operate. The Automation Lifecycle Management plugin also includes the Business Processes component, which is freely available to use and required by Interact Forms.

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.

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

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
- Review and sign-off the process structure.

In addition, ALM includes Wireframer which enables the efficient definition of business objects and actions, using best practice techniques, that can be used as part of an automation process. The benefits of designing using this methodology is that it allows the developers to rapidly deploy business objects and actions that will form the structure of the business process being automated.

For more information, see the ALM user guide and the Wireframer user guide.

Interact plugin

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.

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.