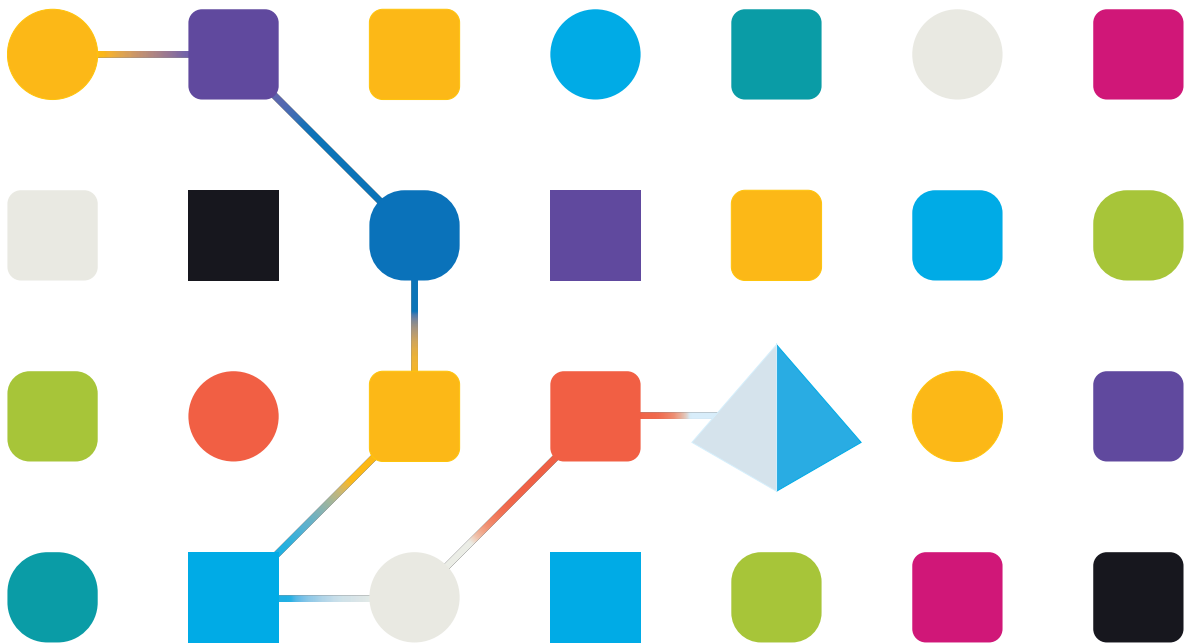


# blueprism<sup>®</sup>

Interact 4.2

User Guide

Document Revision: 1.1



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## Interact

This user guide covers Blue Prism Interact (Interact). Interact consists of two key components, the web-based portal used to submit requests and a plugin within Hub called Forms.


This guide outlines functionality and usage of Interact and the Forms plugin. By utilizing Interact, automation developers can create web-based forms that will allow a user to interact with automations, not just at the point of initialization but also during the process if a human is required to review progress, enabling a “human/digital worker collaboration” approach. It is assumed as part of this guide that the user is familiar with Blue Prism digital workforce and has experience with components such as Hub and Blue Prism.

## About Interact

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.

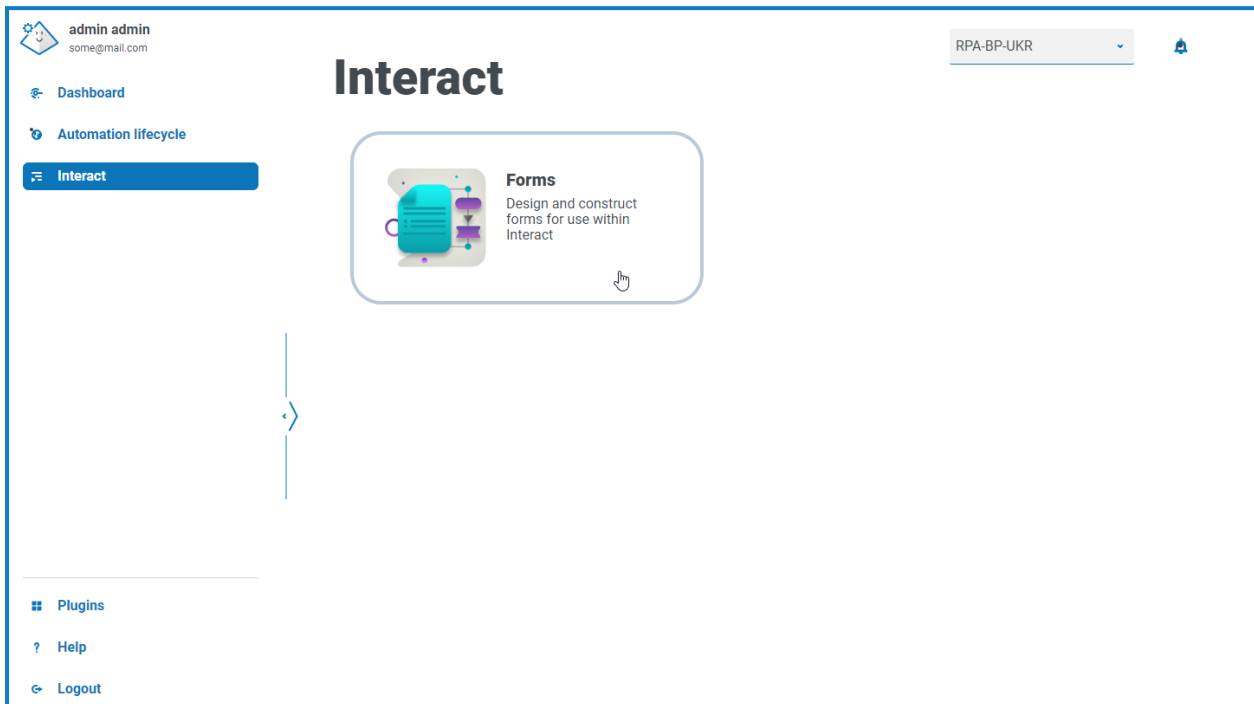
The Interact end user interface is accessed via a web browser, negating the need for any locally installed software. Interact can be accessed as an internal web application or published externally.

 JavaScript must be enabled in your internet browser to use the full functionality of Interact.

This user guide is split into two distinct sections, one section is focused on the developer who is responsible for creating Forms and publishing them for end users to utilize. The second section focuses on the web-based Interact interface where an end user can utilize the Forms and review submitted requests.

## Creating Interact forms

Forms is a Hub plugin that can be found under the Interact section in Hub.



When you open Forms, the Forms page displays. You can select a specific category folder, or the **All categories** folder, to view any forms that have been created. The forms display in descending date order, starting with the most recently updated.

The screenshot shows the 'Interact > Forms' page. At the top left, there are three buttons: 'Filter' (A), 'Import form' (B), and 'Create form' (C). Below these is a sidebar with category folders: 'All categories' (F), 'Human Resources', 'Sales', and 'new'. The main area displays a list of forms. The first form is 'Holiday request' (G), with a 'Rows per page' dropdown set to 5 (D) and 'Page 1 of 2 (6 total rows)' (E). It shows 'Last updated by: admin' (I) with a profile picture and date '26/01/2021 12:16 PM', and 'Locked by: admin' (J) with a profile picture. To the right, form statistics are shown: 1 Page (K), 6 Fields, and 0.1 Version. An 'Options' button (H) is next to it. The second form is 'Adding orders', with 'Last updated by: admin' (I) and date '26/01/2021 12:11 PM', and statistics: 1 Page, 3 Fields, and 0.1 Version. An 'Options' button is also present.

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

- A. **Filter** – Filter the information that is displayed. You can then turn on the required filters and enter or select the appropriate information for display, for example, you could turn on the **Updated by** filter and enter a specific user.



By default, the **Latest** filter is turned on and only the latest versions of each form display. Earlier versions are hidden to provide a clean view. Click **Filter** to display the filters and turn off the **Latest** filter to see previous saved versions.

- B. **Import form** – [Import a form](#) that has previously been exported from an Interact system.
- C. **Create form** – Add a [new form](#).
- D. **Rows per page** – The number of forms that displays on the page. By default, this is set to five. Enter a number, or use the arrows, to change the number of forms seen on a page.
- E. **Previous and Next** – Click to move through the pages of forms.
- F. **Category folders** – The form categories. When selected, the category folder is highlighted and the forms for that category display.
- G. **Form name** – The name of the form with a short summary displayed below.
- H. **Options** – Access the tasks that can be carried out on the form.
- I. **Updated** – The username and profile picture of the last user to update the form along with the date and time.
- J. **Locked by** – The user who is currently editing the form. Other users will not be able to edit the form whilst it is locked. If the form is not locked, this area is blank.
- K. **Form statistics** – Additional information about the form. This only displays data that has been committed for that version, it does not display any draft information, such as draft fields.

## Add a form

Before you can create a form, a business process must already exist. If the **Create form** button is inactive, there are no available business processes to create a form for. You can only have one form associated with a business process. For more information about creating business processes, see the [Automation Lifecycle Management \(ALM\) user guide](#).

1. On the Forms page, click **Create form**.


The Create form page displays.

2. Complete the following mandatory fields to define the overall details of a form:
  - **Business Process** – The business process associated with the form you are creating.
  - **Name** – The name of the form.
  - **Description** – A description for the form.
  - **Delivery method** – The way the form will be delivered. Select **Queue**, **Email**, or both if required.

Selecting **Queue** allows the submitted request to be added into a Blue Prism Queue for processing. Complete the following fields to configure details of the queue:

- **Environment** – The environment that the submitted request will be made into.
- **Queue name** – The queue in the selected environment that will be used to load the submission. The drop-down list displays the 10 most recently used queues. If you cannot see the queue you want, start typing the name in the field to filter the list.

- **Priority** – This is an optional field. The business priority for the submitted form. This can be any value between 1 to 999 with 1 being the highest priority.

 In the Cloud version of Hub and Interact, this functionality utilizes IADA and one of the key approaches used by IADA® is to measure the amount of work (queue items in Blue Prism) based on the Priority and Service Level Agreement (SLA). Each item is labeled with these metrics individually or inherits this value from the associated business process to support the ordering of work. When a digital worker is 'available' to execute a process, IADA® identifies the next best item based on configurable properties and returns the activity to the digital worker. This functionality is not available in the on-premises version of Hub and Interact.

- **SLA** – This is an optional field. The business Service Level Agreement (SLA) timeframe in which the submitted request should be processed within. The definition is ddd.hh:mm:ss and the range from 000.00:00:00 to 999.23:59:59.

Selecting **Email** will allow the submitted request to be forwarded to an email address for review. This is not the approval submission.

- **Default approval type** – Allows the submission to be sent to another user for approval before it is sent for processing. By default, this is set to **None**, meaning the submission is not sent for approval. You can also select **Any approver** or **Single approver**. For a single approver, the form will prompt you to enter the user who will approve any requests from the form before submission.
- **Category** – Allows forms to be grouped together in a defined category to determine who can access the form. For example, you may have categories for Finance, HR and Sales so you can allow specific users access only to the forms in the category that they need to do their role. Categories are defined by entering the name of the category. Once entered, a category will be available from the drop-down list.
- **Icon** – Select the image that will appear with the form in Interact to allow easy identification. You can choose one of the preloaded icons by selecting **Preset icons**, these are defined into categories: Application, Banking, Data, Education, Emotion, Food, Gadgets, Medical, Network and Security, Science and Technology, Transportation, and User Interface. Alternatively, you can load your own icon by selecting **Upload** and browsing to your icon. Icons must be a PNG, JPG or SVG file, no bigger than 256 x 266 px and 30KB in size.

### 3. Click **Create form** at the bottom of the page.

The Edit form page displays for your newly created form. You can now add the required elements to the form:

- [Pages](#)
- [Fields](#)
- [Rules](#)



## Add pages to a form

It can help to think about how the pages appear in Interact; each page appears as a tab on the form within the Interact screen. As such, you can have multiple pages per form to break the amount of information required into specific sections. You can also [define rules](#) so that only specific pages will appear when certain criteria are met.

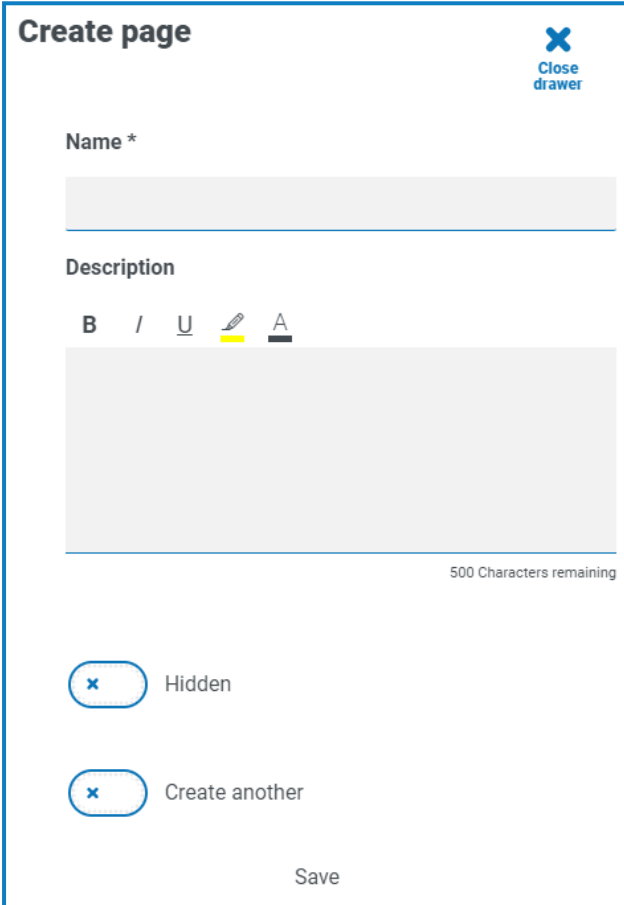
If you have just created a new form and now want to add pages, go to step 2.

1. On the Interact Forms page, click **Options** next to the required form and click **Edit form**.

The Edit form page displays.

2. Click **Create page**.

The Create page panel displays.



**Create page** Close drawer

Name \*

Description

B / U A

500 Characters remaining

Hidden

Create another

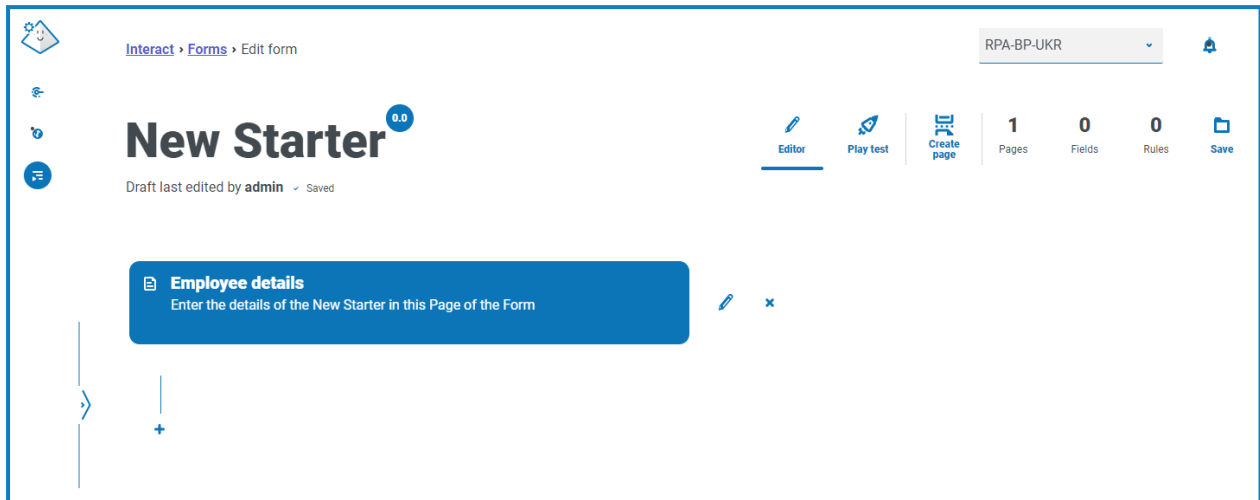
Save

3. Enter a name and description for the new page.
4. If required, select **Hidden**. When selected, the page will only display when [certain criteria](#) is fulfilled.
5. To immediately create another page, select **Create another**.

When you save this page, a notification displays confirming the page has been created and the panel stays open enabling you to immediately enter details for a new page. The fields contain the information that you have just saved and you can edit them as required.

## 6. Click **Save**.

The Edit form page displays showing any pages you have created.



## Add fields to a form

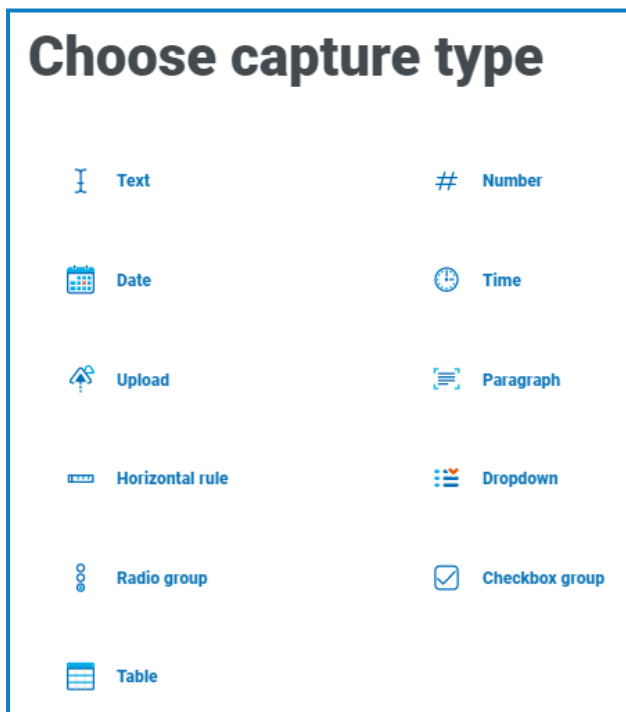
If you have just created a new form with a page and now want to add fields, go to step 2.

1. On the Interact Forms page, click **Options** next to the required form and click **Edit form**.

The Edit form page displays.

2. Click the **Create field** icon **+** below the appropriate page.

The Choose capture type dialog displays.



3. Select the required capture type:

- Text
- Date
- Upload
- Horizontal rule
- Radio group
- Table
- Number
- Time
- Paragraph
- Dropdown
- Checkbox group

These all create input fields within your form, with the exception of the Horizontal Rule. The Horizontal Rule is purely a visual element.

4. Complete the required fields for the type of capture you have selected. Regardless of the input field type, they all contain the following common fields which should be completed as a minimum:

- **Initial State** – The state that the field is set to when a user first accesses the form:
  - **Optional** – It does not matter whether a user completes the field or not.
  - **Mandatory** – Must be completed by the user before the form can be submitted.
  - **Read-Only** – The field cannot be edited. This is typically used as an input from an automation where the information has been retrieved and updated so the user can review.
  - **Hidden** – The field has [rules](#) applied so that it only appears when a predetermined condition is met.
- **Label** – This is the text that will appear alongside the field in the form. This should be a friendly name so a user can understand what they should be entering into the field.
- **Automation ID** – This is the name that ties to the data item within the automation. This field has a restricted format, it can only be lowercase letters and no spaces or special characters are allowed. A hyphen, '-', is allowed to represent a space. When a Label is applied an Automation ID is automatically generated using the formatting restrictions, this is only a suggestion and can be changed if required.
- **Description** – Although this is not a mandatory field it provides the 'help text' alongside the field in the form.

5. Optionally, if the data that is entered is of a sensitive nature, select **Mask Data on Submission**. By selecting this option, once the request has been submitted the data is redacted from review.




This option is only available for Text fields. Therefore, if you want to submit a number and redact the content after submission, use a Text field for the input rather than a Number field.

## 6. Click **Create field**.

The field is added to the form. Repeat the steps until you have all the required fields.

The screenshot shows the Interact form editor interface. At the top, there is a navigation bar with 'Interact > Forms > Edit form' and a dropdown menu for 'RPA-BP-UKR'. Below this, the form title 'New Starter' is displayed with a version number '0.4'. A toolbar contains buttons for 'Editor', 'Play test', 'Create page', 'Collapse all', 'Expand all', 'Pages' (1), 'Fields' (8), 'Rules' (3), and 'Save'. The main form area shows a section titled 'Employee details' with the instruction 'Enter the details of the New Starter in this Page of the Form'. Below this, there are two text input fields: 'First Name' and 'Last name', both marked as 'Optional'. The 'First Name' field has a key icon next to it, indicating it is the key field. A vertical flow diagram on the left shows the sequence of fields.

You can reorder the fields by dragging and dropping them into a new location.

You can select one field to be identified as the key field using the key icon . Once selected, a key will appear alongside the field name in the form. This information can then be used within Interact submissions as a filter to look for particular text. For more information, see [Key field on page 38](#).



Only a Text or Number field type can be selected. You can reassign which field is the key field by clicking on the key next to the required field. If you want to remove the key, you will need to delete the field and recreate it.

## Field types

There are eleven different field types listed below with examples and configurable parameters.

- Text
- Date
- Upload
- Horizontal rule
- Radio group
- Table
- Number
- Time
- Paragraph
- Dropdown
- Checkbox group

### Text field

The Text field is the most commonly used field. It allows information data to be captured and will allow alphanumeric combinations; so, both letters and numbers are accepted.

The screenshot shows the 'Create text' configuration interface. The left panel includes a 'Mask data on submission' checkbox, an 'Initial state' dropdown menu set to 'Mandatory', a 'Label' text field containing 'Input Text Field', an 'Automation ID' text field containing 'input-text-field', a 'Description' text area containing 'An example Input Text Field' with a character count of '123 Characters remaining', and a 'Placeholder' text field. The right panel features radio buttons for 'Simple' (selected) and 'Regex', a 'Minimum character length' dropdown set to '2', a 'Maximum character length' dropdown, an 'Allowed characters' text field containing 'A-Z', a 'Non-allowed characters' text field, an 'Initial value' text field, and a 'Create another' button. A 'Create field' button is located at the bottom right of the right panel.

In the example above, the field has been set to mandatory with a minimum limit of two characters but no maximum limit on the number of characters entered. The field has been restricted to uppercase characters by applying a Simple character restriction.

Using the Regex function, you can create a complex character string restriction. Using the UK National Insurance Number as an example, a Regex can be applied that will ensure that the correct format is always entered, if not a warning message will be given.

## Create text

↺ ✖  
Reset all Cancel

Define the details of your desired capture field

Mask data on submission

**Initial state \***

Mandatory

**Label \***

National Insurance Number

**Automation ID \***

national-insurance-number

**Description**

National Insurance Number, for example, AA123456C

101 Characters remaining

**Placeholder**

Simple  
 **Regex**

**Regex \***

`^[A-CEGHJ-PR-TW-Z]{1}[A-CEGHJ-NPR-TW-Z]{1}[0-9]{6}[A-D]{1}$`

**Validation error message \***

Invalid National Insurance Number

**Initial value**

✖ Create another

Create field

Click **Play Test** to test the character string restriction and view the results of entering a correctly and incorrectly formatted number.

## New Starter 0.0

Editor Play test 1 Pages 8 Fields 3 Rules Save

Saved

📄 Employee details

**Employee details**

Enter the details of the New Starter in this Page of the Form

**National Insurance Number \***

National Insurance Number, for example, AA123456C

AA987654D

## New Starter 0.0

Editor Play test 1 Pages 8 Fields 3 Rules Save

Saved

📄 Employee details

**Employee details**

Enter the details of the New Starter in this Page of the Form

✖ **National Insurance Number \***


Invalid National Insurance Number

AA987654K

🔗 Mask Data on Submission is only available within the text field. Therefore, if you want to submit a number and redact the content after submission then use a text field to input rather than a number field.

## Number field

The Number field restricts the entry to numerical characters only. The field supports the use of the period or full stop '.' as a decimal point and a comma ',' for the thousand's separator. If the number is a financial number, you can use the prefix character to apply any applicable currency symbol. Additionally, you can force the use of the comma ',' as the number is typed by selecting the **Show commas** option. Finally, you can assign a minimum and/or a maximum value to the number if appropriate.

 Multiple countries use decimal comma rather than a decimal point as a separator. If this is required it is recommended that a Text field is used to define the applicable format rather than a Number field.

In the example, the Number field is being used to create a salary field. This captures a salary, prefixing it with the '£' symbol and forcing the commas to be applied as a thousand's separator. In this example, a **Placeholder** has also been defined. A placeholder will show gray text in the field prior to being typed into, thus a representative value can be displayed.

If you want to apply a specific Regex to a number, then use a Text field. This will enforce the format that you need. For example, the following Regex will check that a UK Mobile Telephone is entered correctly:


```
^07([\d]{3})[(\D\s)]?[\d]{3}[(\D\s)]?[\d]{3}$
```



## Date field

The Date field allows you to use a calendar pop-up to select a date. The date can be configured to meet specific configuration parameters.

The example shows a new starter joining date selection. The example specifies the date format as DD/MM/YYYY, however, there are two other options which are MM/DD/YYYY or YYYY/MM/DD. A placeholder has been entered showing the format that the date will appear in, and the searching of the date has been restricted to only dates in the future from today's date. If **Today-** is selected as the **Initial value**, you can then enter a number in **Days from today's date** which restricts the calendar to commence a number of days past. Additionally, using the **Past date restriction** or **Future date restriction** fields you can create a 'window' on the dates that the user of the form can access, for example, setting 14 days will create a window of just 14 days that the user can access.

 When using the **Past date restriction** or **Future date restriction** field in conjunction with **Today-** or **Today+**, the date restriction must include the total number of days. The number of days for the window and the number of days past or future.

When reviewing the output, the user will see a pop-up calendar that they can use to select the date they require.

The screenshot shows the 'New Starter' form editor interface. At the top left, the title 'New Starter' is displayed with a '0.0' version indicator. To the right, there are navigation icons for 'Editor', 'Play test', 'Pages' (1), 'Fields' (8), 'Rules' (3), and 'Save'. Below the title, a 'Saved' status is shown. A sidebar on the left contains a tab labeled 'Employee details'. The main content area is titled 'Employee details' and includes the instruction 'Enter the details of the New Starter in this Page of the Form'. A 'Start Date' field is present, with the label 'Start date for the new starter' and a text input containing '18/03/2021'. Below the input is a calendar widget showing 'March 2021' and 'April 2021'. The date '18' in March is highlighted in blue. The calendar grid is as follows:

March 2021							April 2021						
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su
1	2	3	4	5	6	7		1	2	3	4		
8	9	10	11	12	13	14	5	6	7	8	9	10	11
15	16	17	18	19	20	21	12	13	14	15	16	17	18
22	23	24	25	26	27	28	19	20	21	22	23	24	25
29	30	31					26	27	28	29	30		

## Time field

The Time field allows the user to select from a drop-down menu a particular time. The format for the time is a 12-hour clock and allows the user to select either AM or PM.

The images below show the Time field capture properties and an example display within a form.

### Create time

↻ ↺  
Reset all Cancel

Define the details of your desired capture field

**Initial state \***

Optional
▼

**Label \***

Start Time

**Automation ID \***

start-time

**Description**

Enter the start time for the new starter

110 Characters remaining

**Initial value**

09:00:00
✕
🕒

✕ Create another

Create field

### New Starter 0.0

✎ 🚀 1 8 3 📄  
Editor Play test Pages Fields Rules Save

✓ Saved

Employee details

**Employee details**

Enter the details of the New Starter in this Page of the Form

**Start Time**

Enter the start time for the new starter


09:00:00
✕
🕒

09	00	00
10	01	01
11	02	02
12	03	03
13	04	04
14	05	05
15	06	06

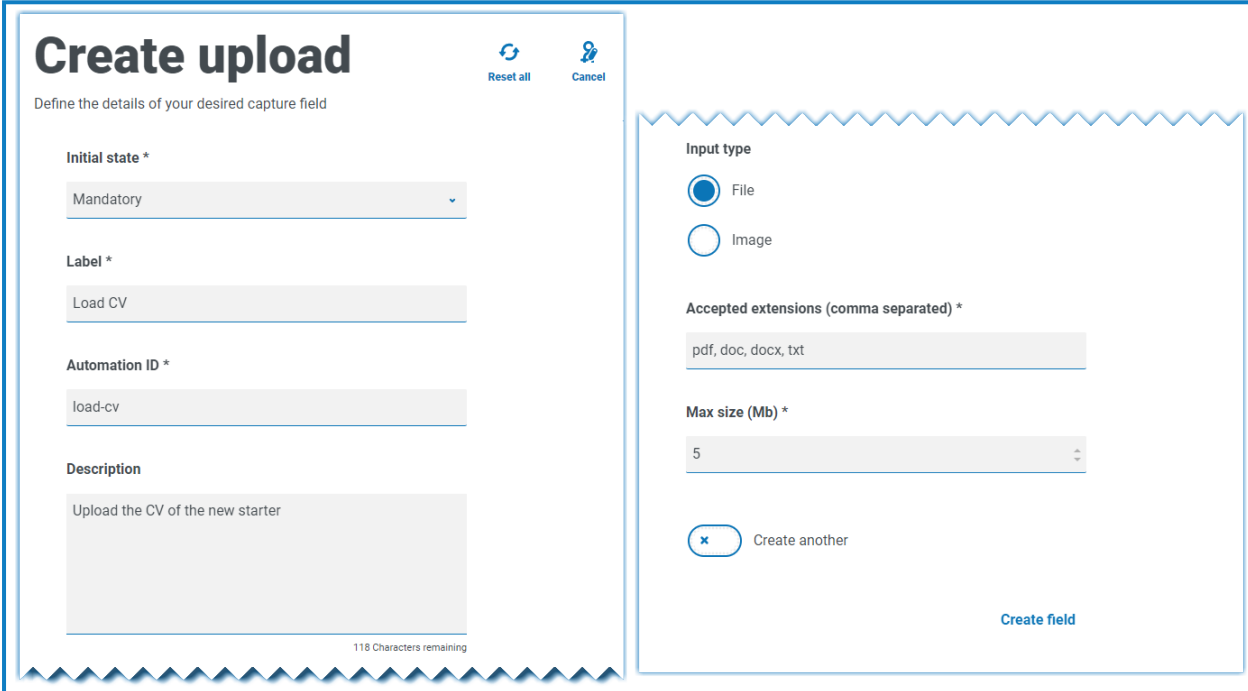
## Upload field

The Upload field allows a file or image to be parsed into an automation for further processing. The transfer is for any formats except for executable files with a .exe file extension.


Files are stored within 'blob' storage and a URL is included in the collection sent to the Blue Prism Queue. An example upload field is shown below.

 By default, the maximum file upload size is restricted to a maximum of 5 Mb and the image size is restricted to 1920 x 1080px.

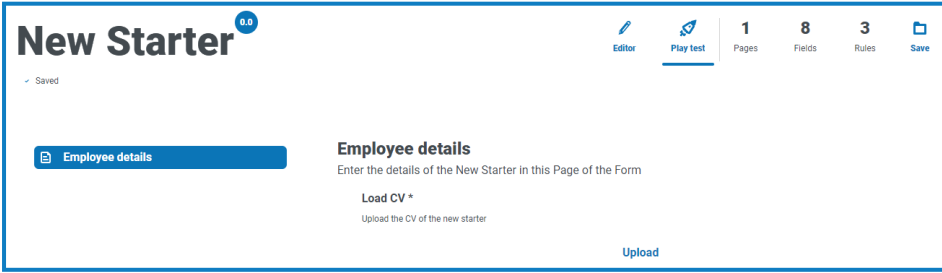
The maximum size can be increased by a system administrator by changing the value defined in the Hub configuration file on the server. The value specified in the **Max size** field on the Create upload page cannot be greater than the value defined in the configuration file (by default, this is 5).



In the example above, the Interact user will be allowed to upload a CV of the new starter. The document that is uploaded can be in PDF, Microsoft Word, or Text format.

 The allowed extensions must be entered without a leading period or full stop '!'.

The user will see the following in the form when they are submitting a request.



## Paragraph field

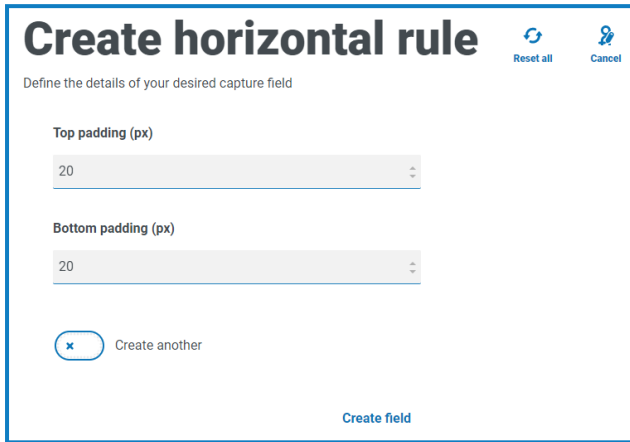
The Paragraph field allows you to put formatted text onto the form so that it can provide information to the Interact user. The text is not submitted as part of a request to Blue Prism and therefore there is no Automation ID.

You can use formatting techniques to bold, underline, italicize, and highlight text. Additionally, the text can be hidden until a [rule](#) condition is used to display.

The text will appear in the form as illustrated below.

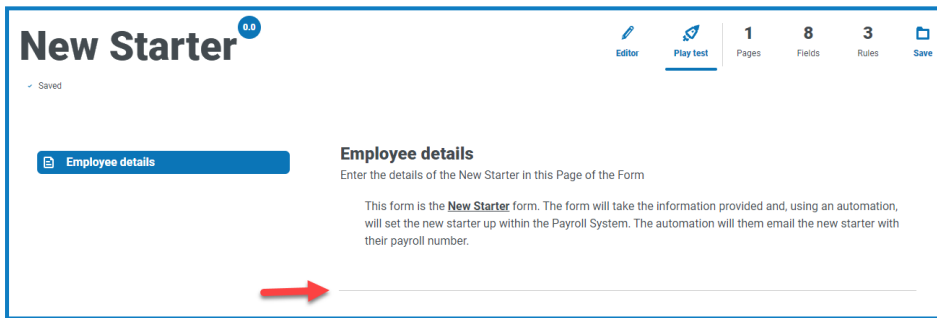
## Horizontal rule field

The Horizontal rule field does not have any use within an automation it is used for cosmetic purposes to break up large pages in a form. The horizontal rule can be padded as shown below.



The screenshot shows a dialog box titled "Create horizontal rule". At the top right, there are "Reset all" and "Cancel" buttons. Below the title, it says "Define the details of your desired capture field". There are two input fields: "Top padding (px)" and "Bottom padding (px)", both with a value of "20". At the bottom left, there is a "Create another" button with a close icon. At the bottom right, there is a "Create field" button.

The image below shows the horizontal rule field in use.



The screenshot shows a form titled "New Starter" with a "0.0" version indicator. The form has a navigation bar with "Editor", "Play test", "1 Pages", "8 Fields", "3 Rules", and "Save" buttons. Below the title, there is a "Saved" status. A tab labeled "Employee details" is active. The main content area is titled "Employee details" and contains the text: "Enter the details of the New Starter in this Page of the Form". Below this text, there is a horizontal line representing the rule field, with a red arrow pointing to it from the left.

## Dropdown field

The Dropdown field allows an Interact user to select either single or multiple items from a drop-down menu. An example configuration of a single selection drop-down field.

This will create the following element in the form for the user to access.

If a drop-down is created with multiple selection, then a restriction on whether the user has to select a minimum or maximum number of items can be applied.

If you put the drop-down items in the wrong order, you can use the arrows to the right to reorder the list. When items are chosen from the drop-down list, they will appear below the field on the form. Items selected accidentally can be removed by selecting the 'x' alongside the item.

The [radio group](#) and [checkbox group](#) fields do a similar function to the Dropdown field, which is the selection of either a single or multiple items. However, if real estate on your form is of a premium, then the dropdown is the recommended route especially if there is a large quantity of items. If there are only a few items to select from and the form overall size doesn't matter, then either the Radio group or Checkbox group fields can be utilized.

A maximum number of 250 items can be added to a drop-down field.



## Radio group field

A Radio group field like the [Dropdown](#) field can be used to select a single item from a list. The difference is the display within the form. The radio group field will take more real estate on the form so if there are a large number of items that need to be selected from, then a drop-down may be a better solution. The example below shows a radio group where the user has to choose between three options.

**Create radio group**  
Define the details of your desired capture field

Initial state \*  
Mandatory

Label \*  
Gender

Automation ID \*  
gender

Description  
The gender of the new starter  
114 Characters remaining

Options  
Created 3 from 10 option(s)

Default	Label	Value	Actions
<input type="checkbox"/>	Male	male	Remove ↓ ↑
<input type="checkbox"/>	Female	female	Remove ↓ ↑
<input type="checkbox"/>	Not specified	not-specified	Remove ↓ ↑

Add option

Create another

Create field

**New Starter** 0.0

Editor Play test 1 Pages 8 Fields 3 Rules Save

Employee details

Employee details  
Enter the details of the New Starter in this Page of the Form

Gender \*  
The gender of the new starter

Male

Female

Not specified

A maximum of 10 items can be added to a Radio group field.

When the form is deployed to Interact, the radio group buttons display in a visually different way to that shown on in the Play test area. They display as a horizontal button bar within the Interact website. For example:

**Employee details**  
Collect basic information about the new Blue Prism employee

First name \*  
Last name \*

Region based in

EMEA

APAC

US

Employee details  
Collect basic information about the new Blue Prism employee

First name \*  
Last name \*

Region based in

EMEA APAC US

Next

## Checkbox group field

The Checkbox group field can be used when you want to allow the user to choose more than one item from a display on the form. All the items will be shown, as opposed to the **Dropdown** field where the user scrolls through a list. The Checkbox group field below shows a field established where there are six options that the user can select from. However, if the field is left as a single selection type, the user can only select one item. This is the same functionality as the radio group field but presents a different display.

### Create checkbox group

Define the details of your desired capture field

Reset all
Cancel

**Initial state \***

Mandatory

**Label \***

Education Qualifications

**Automation ID \***

education-qualifications

**Description**

Select all education qualifications that apply

104 Characters remaining

**Selection type**

Single

Multiple

**Minimum selection**

Maximum selection

**Options**

Created 7 from 10 option(s)

Default	Label	Value	Remove	↓	↑
<input type="checkbox"/>	GCSE	gcse	Remove	↓	↑
<input type="checkbox"/>	A Level	a-level	Remove	↓	↑
<input type="checkbox"/>	HND/HNC	hndhnc	Remove	↓	↑

Add option

Create field

## New Starter 0.0

Saved

Editor
Play test
1 Pages
8 Fields
3 Rules
Save

Employee details

### Employee details

Enter the details of the New Starter in this Page of the Form

**Education Qualifications \***

Select all education qualifications that apply

- GCSE
- A Level
- HND/HNC
- BTEC
- Degree
- Master
- PhD

If the multiple selection type is chosen, the user can select multiple items from the display. However, you can restrict the number chosen by setting a minimum and maximum selection value.

### Create checkbox group

Define the details of your desired capture field

**Initial state \***  
Mandatory

**Label \***  
Education Qualifications

**Automation ID \***  
education-qualifications

**Description**  
Select all education qualifications that apply  
104 Characters remaining

**Selection type**  
 Single  
 Multiple

**Minimum selection**  
1

**Maximum selection**  
4

**Options**  
Created 7 from 10 option(s)

Default	Label	Value	Actions
<input type="checkbox"/>	GCSE	gcse	Remove ↓ ↑
<input type="checkbox"/>	A Level	a-level	Remove ↓ ↑
<input type="checkbox"/>	HND/HNC	hndhnc	Remove ↓ ↑

### New Starter <sup>0.0</sup>

Editor Play test 1 Pages 8 Fields 3 Rules Save

✓ Saved

**Employee details**

Enter the details of the New Starter in this Page of the Form

**Education Qualifications \***  
Select all education qualifications that apply

- GCSE
- A Level
- HND/HNC
- BTEC
- Degree
- Master
- PhD

A maximum of 10 items can be added to a Checkbox group field.

## Table field


The Table field allows you to enter a table within in a form that can be used to collect data.

In this example, education qualifications are being collected and the user would be expected to type into the field the qualifications they have at the appropriate level. This example defines a table starting with an initial row count of three rows, with the maximum rows that a user can go to set as 12 rows. This displays the following:

The use of the initial state is important. If you set the Table field to a state of mandatory and you specify a table of 6 columns by 3 rows, then the user will need to fill in every cell in the table with a value before the request can be submitted. This could be a requirement, but the use of the optional state may be better in most table fields. However, you can use the mandatory state in combination with setting a column to allow blank or empty values within the column. This is performed by selecting **Allow empty value** alongside the column you will allow blank values in.

## Add rules to a form

Rules enable you to control the form and activate different fields or pages depending on whether specified conditions are met. Using the Play Test area, rules can be tested prior to releasing the form for normal user usage.

 The inbuilt rule which is enforced in the Interact user interface, where you cannot move to a new page if there are mandatory fields that need to be completed on the current page, does not apply in the Play Test area.

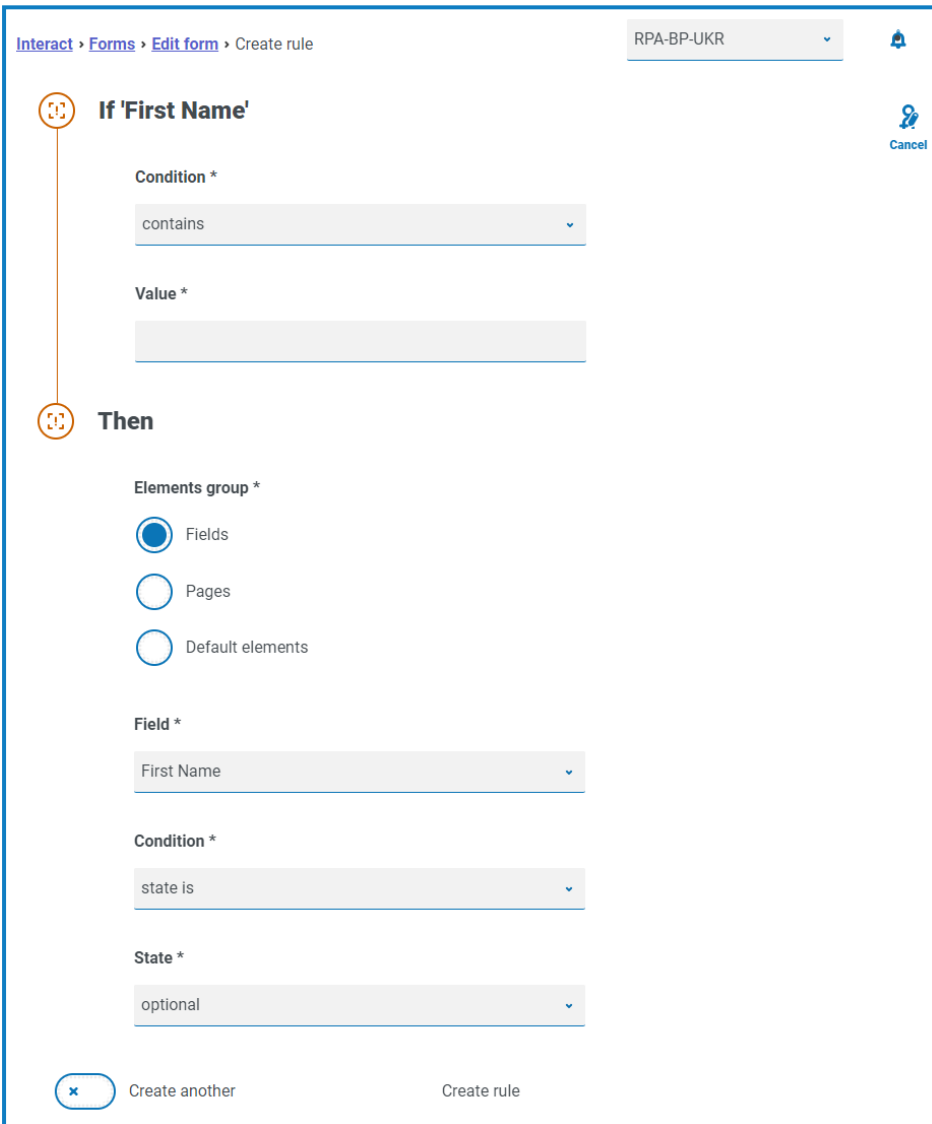
If you have just created a new form and you still have the Edit form page open, go to step 2.

1. On the Interact Forms page, click **Options** next to the required form and click **Edit form**.

The Edit form page displays.

2. Click the **Create rule** icon  below the appropriate field.

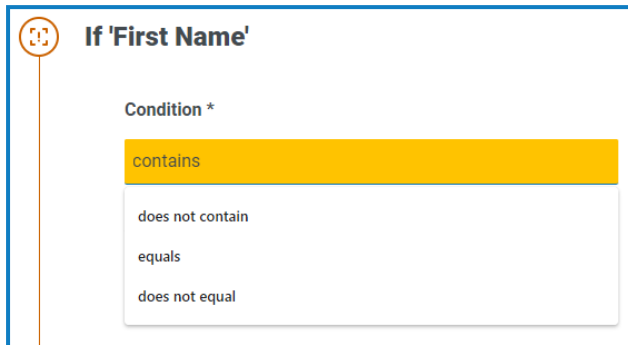
The Create rule page displays.



The screenshot shows the 'Create rule' page in Interact. The page is titled 'Interact > Forms > Edit form > Create rule' and has a dropdown menu for 'RPA-BP-UKR'. The main content is divided into two sections: 'If' and 'Then'. The 'If' section is titled 'If 'First Name'' and has a 'Condition \*' dropdown set to 'contains' and a 'Value \*' text input field. The 'Then' section is titled 'Then' and has an 'Elements group \*' section with three radio buttons: 'Fields' (selected), 'Pages', and 'Default elements'. Below this is a 'Field \*' dropdown set to 'First Name', a 'Condition \*' dropdown set to 'state is', and a 'State \*' dropdown set to 'optional'. At the bottom left, there is a 'Create another' button with a close icon, and at the bottom right, there is a 'Create rule' button.

Rules are created based on typical 'If Then' statements, so if a specific condition is met, then a defined action is performed. The If condition is dependent on the field you have selected and the

name of the field is shown next to If on the page. The options for the rules will vary depending on the specific field type. For example, for a text field, the conditions for the If are:



3. Configure the If statement:

a. **Condition** – Select the validation to perform on the field, for example:

- contains
- does not contain
- equals
- does not equal

The options that are available depend on the type of field for which you are setting the rule.

b. **Value** – Enter or select the value that the condition is looking for within the field.

4. Configure the Then statement:

a. **Element group** – Select the required option. This defines the level at which the result of the rule is applied, for example, whether it affects a particular field, page or the default elements. The following fields will change depending on your selection.

b. **Field, Page or Default element** – Select the object that is impacted by the If statement being true.

c. **Condition** – Select the action to take on the Then clause, for example, set value to, state is, and so on. The options that are available depend on the option you selected under **Element group**.

d. **State or Value** – Enter the new value or select the state of the object in the Then statement, for example, the state could be set to hidden or visible.

5. Click **Create rule** to add the rule.

If **Create another** is selected, a message displays to say the rule has been created. You can then edit all the fields in the rule to create a new rule.

Otherwise, the Edit form page displays with the rules displaying under the associated fields. A numerical indicator is shown next to the field to indicate the number of rules below it. From here, rules can be deleted and edited.

The screenshot shows the 'New Starter' form editor interface. At the top, there's a title 'New Starter' with a version indicator '0.4'. Below the title, there are navigation icons: Editor, Play test, Create page, Collapse all, and Expand all. On the right, there are statistics: 1 Page, 8 Fields, 4 Rules, and a Save button. The main content area shows a form structure. At the top is a blue box labeled 'Employee details' with the instruction 'Enter the details of the New Starter in this Page of the Form'. Below this is a 'First Name' field, which is optional and has a '1' next to it, indicating one rule is associated with it. A rule is displayed below the 'First Name' field: 'If 'First Name' contains 'Zachary' then 'Last name' set valu...'. Below the rule is a '+', indicating more rules can be added. At the bottom is a 'Last name' field, which is also optional.

## Example rules

To show how rules operate, an example is shown below where if the First Name field is set to *Zachary*, then the Last Name will always be set to *Smith*.

**If 'First Name'**

**Condition \***

contains

**Value \***

Zachary

**Then**

**Elements group \***

Fields

Pages

Default elements

**Field \***

Last name

**Condition \***

set value to

**Value**

Smith

Using **Play test**, this rule can be tested. If:

- *Andrew* is entered in the **First Name** field and then the user clicks in the **Last Name** field, then clicks outside of the field, the warning *Last Name is required* displays.

### New Starter 0.4

Draft last edited by admin - Saved

Editor Play test 1 Pages 8 Fields 4 Rules Save

Employee details

**Employee details**

Enter the details of the New Starter in this Page of the Form

**First Name \***

Andrew

**Last Name \***

Last Name is required.



- *Zachary* is entered in the **First Name** field and then the user clicks in the **Last Name** field, *Smith* is automatically added.

Within rules it is also possible to show or hide a field or page, dependent on the initial state of the object in the form.

The following rule hides the Payroll Information page if the salary is over £75,000.

## Save the form

Once you have added the pages, fields, and rules, you need to save the form. Until this point, the information in the form is saved as draft and not committed to a version.

If you have just created a new form, or edited an existing form, and you still have the Edit form page open, go to step 2.

1. On the Interact Forms page, click **Options** next to the required form and click **Edit form**.

The Edit form page displays.

2. Click **Save**.

The Increase minor panel displays.

3. Enter a description about the update to the form and click **Save**.

The changes to the form are saved and the version number is incremented by 0.1.

## Managing forms

### Version control

Forms are subject to version control to assist during development. Each time a form is saved, the minor version is incremented and annotated with the entered description for ease of identification.

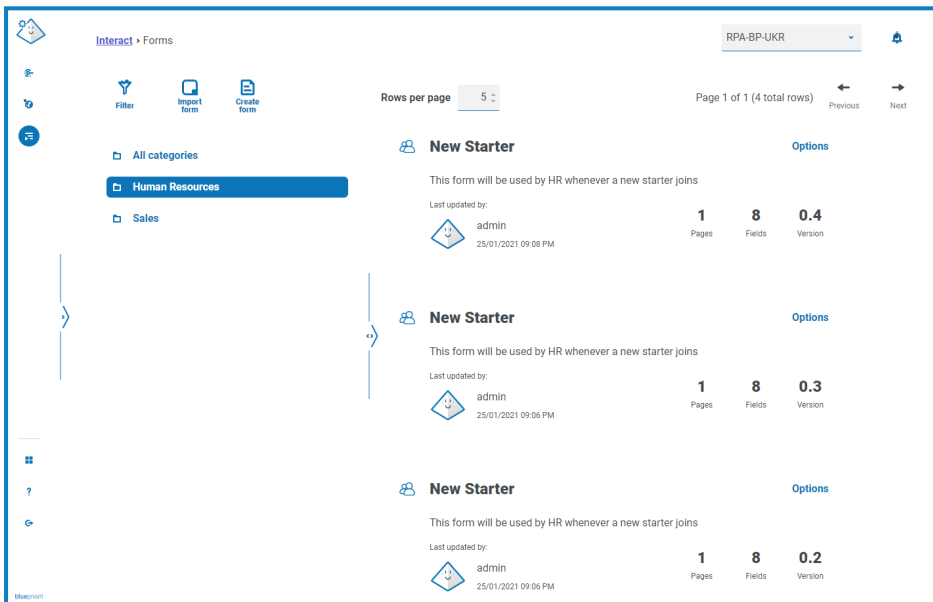


By default, the **Latest** filter is turned on and only the latest versions of each form display on the Forms page. Earlier versions are hidden to provide a clean view.

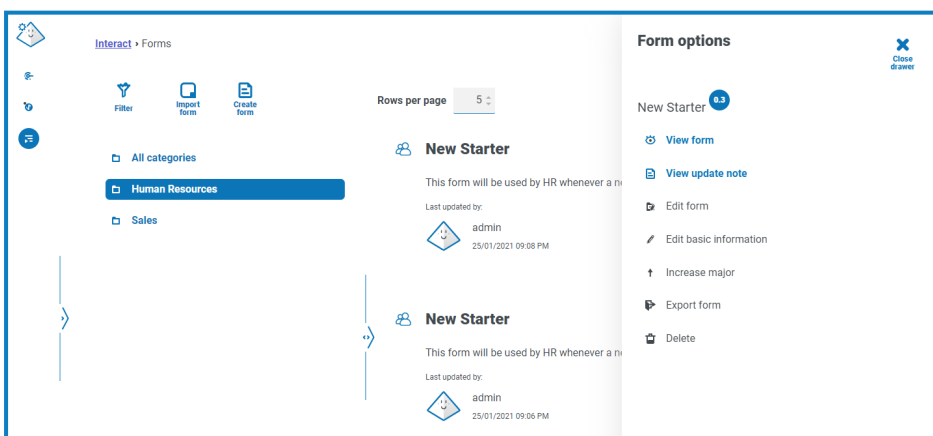
To view all the minor versions of a form:

1. On the Interact Forms page, click **Filter** to display the filters.
2. Turn off the **Latest** filter.

All versions display.



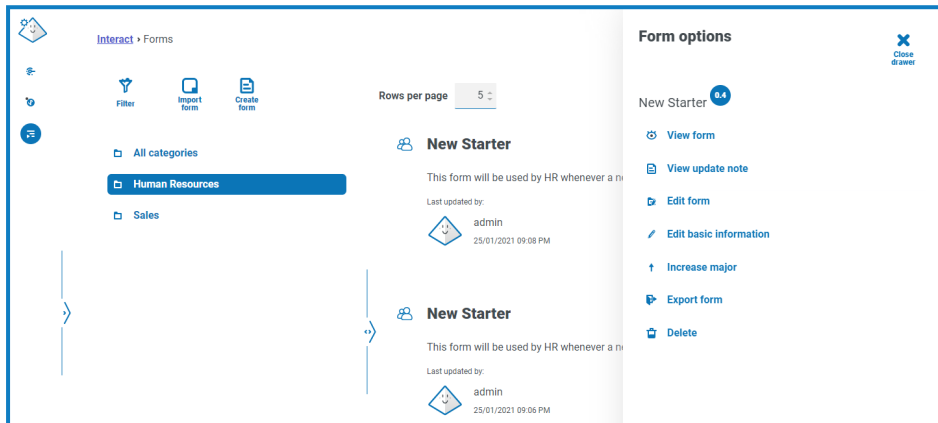
3. If required, click **Options** on an earlier version of the form. From here you can select either to view the form or view the update note.



You can only access all the options from the latest version of the form. These are:

- **View form** – Displays the form and enables you to use **Play test**, but you cannot edit or make changes to the form.

- **View update note** – Displays the associated update note.
- **Edit form** – Allows you to continue editing the form.
- **Edit basic information** – Allows the basic details associated with the form to be updated.
- **Increase major** – Increases the form version to a major version.
- **Export form** – Exports the form in a BPFORM file format for importing into another system.
- **Delete** – Deletes the latest version of the form, reverting back to the previous version. You cannot delete the original version of the form.



## Import a form

Forms that have been previously exported from this or another Interact system can be imported to save having to recreate forms that have already been developed.

Before you can import the form, you will need to have a business process available that does not have any forms already assigned to it.

1. On the Interact Forms page, click **Import form**.

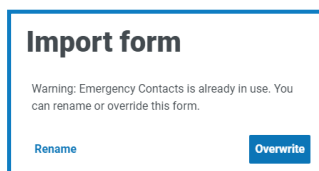


If there are not any business processes available that do not have a form associated with them already, the **Import form** icon is not active. You will need to create a business process before you can import the form. You can only have one form associated with a business process. See the [Automation Lifecycle Management User Guide](#) for more details.

2. Navigate to, and select, the required exported form.

If the form:

- Already exists in your Interact system, a message displays.



- Doesn't already exist, the Import form page displays.

3. If required, select one of the following options:
  - **Overwrite** – The Import form page displays. This has the same fields as [Edit form page](#) where a description, delivery method, default approval type, update note, category, and icon can be added.
  - **Rename** – The Import Form page displays. You must select the business process to which the form will be assigned, and enter a new name for the form.
4. If required, change the business process that the form is to be linked with.
5. Click **Import form** to complete the import.

## Test a form

You can use **Play test** when viewing or editing a form to test the fields and functionality, and view the form as it will look to an Interact user. It allows you to test and verify that any rules or field restrictions work as required.

To test a form:


1. On the Interact Forms page, click **Options** for the required form, and then click either **View form** or **Edit form**.
2. Click **Play test**.

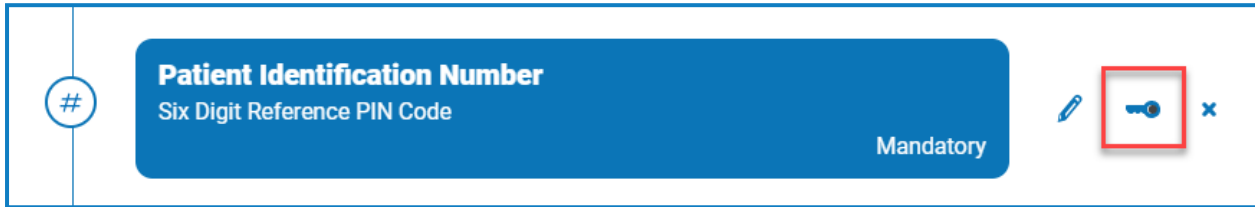
The example below shows the Play test page for a multi-page form.

The screenshot shows the 'Play test' interface for a form titled 'Onboarding Blue Prism'. The breadcrumb trail is 'Interact > Forms > View form'. The form is associated with the business process 'RPA-BP-UKR'. The form statistics are: 2 Pages, 13 Fields, and 55 Rules. The form is currently on the 'Employee details' page, which is a sub-section of 'General Details'. The form asks for 'First name \*', 'Last name \*', and 'Region based in' (with radio buttons for EMEA, APAC, and US). A 'Next' button is visible at the bottom right.

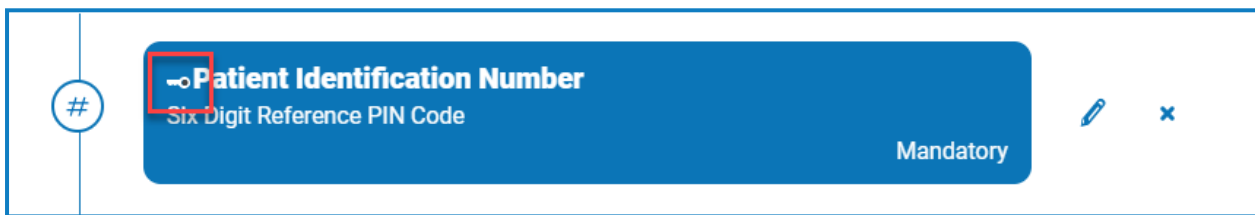
## Key field

A key field provides an easy way to track and audit the data as it moves through your automation.

When creating your form, you can select one field to be identified as the key field using the key icon . The key icon is only available next to fields that are a Text field type or a Number field type. Once selected, a key will appear alongside the field name in the form, for example:

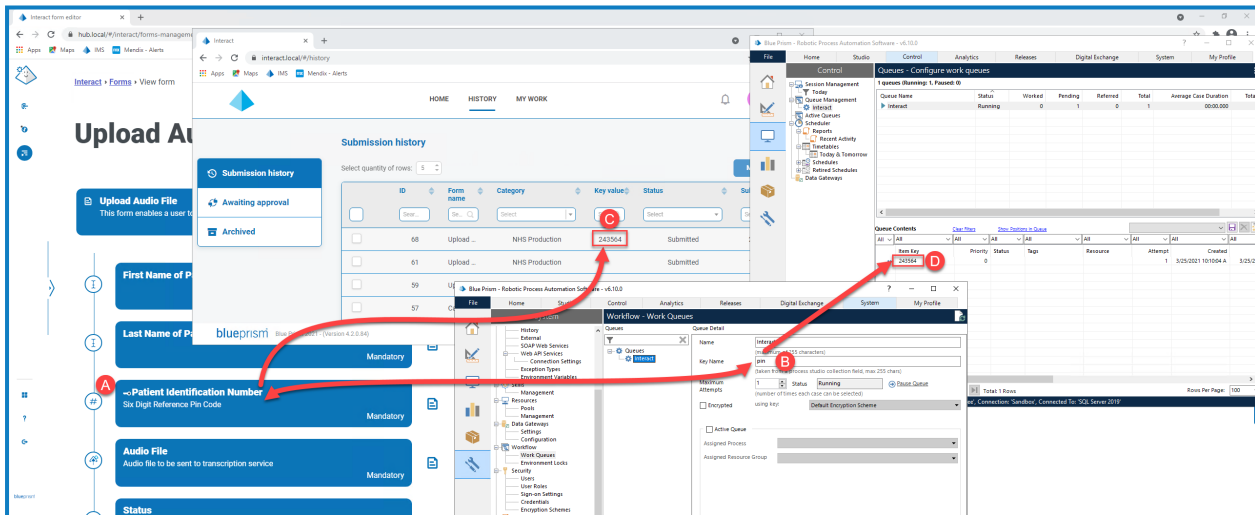


becomes



You can reassign which field is the key field by clicking on the key icon next to a different field. If you want to remove the use of a key field from the form entirely, you need to delete the field that the key is assigned to and recreate the field.

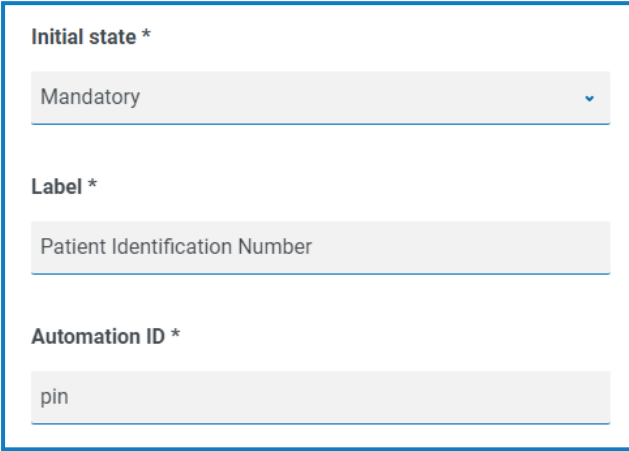
The key field can be used to track data from the form in Interact through to the processing of the data by work queues in Blue Prism:



This example shows that:

- A. A form has been created with a field called Patient Identification Number that has been set to be the key field.

- B. In Blue Prism > System Manager > Workflow > Work Queues, a work queue can be configured to look for the key field information. In the **Key Name** field, enter the automation ID that was used when creating the form. In the example above, the automation ID is *pin* as the Patient Identification Number field was created as a Number type field with the following values:



The screenshot shows a configuration form with three sections, each with a label and an asterisk indicating it is required:

- Initial state \***: A dropdown menu with the value "Mandatory" selected.
- Label \***: A text input field containing the text "Patient Identification Number".
- Automation ID \***: A text input field containing the text "pin".

It is important that the value entered in the **Key Name** field in Blue Prism matches the value entered in **Automation ID** for the form field.

- C. When users complete this form in Interact and submit the form, the value that they have entered in this field displays in the **Key Value** column on the Submission history page in Interact. If required, users can filter this column to look for particular values. For more information, see [Interact user interface](#).
- D. The key value is displayed in the Blue Prism work queue as the information is processed.

## Deploying forms

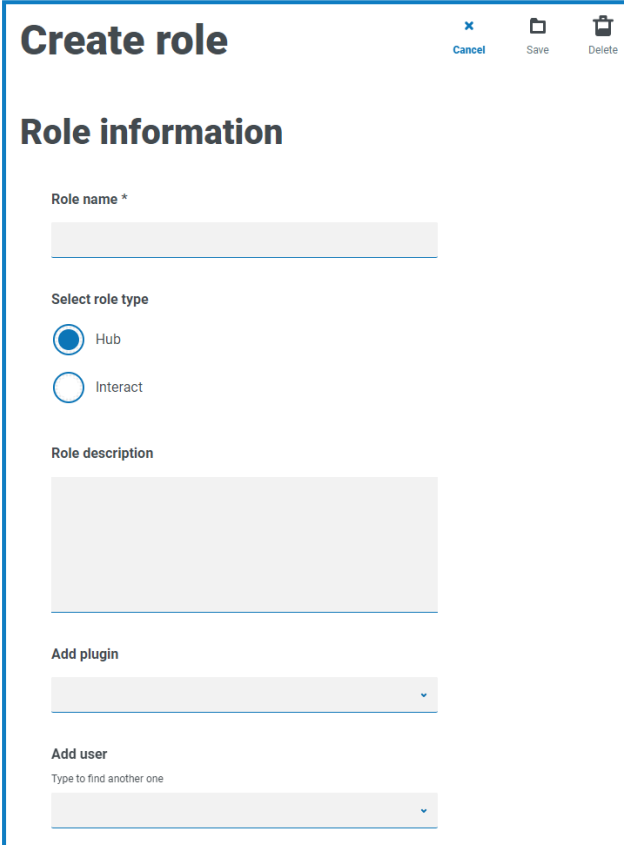
Once a form has been created for use in the Interact user interface, the form must be assigned to a role to make it available to the required users. This task can only be carried out by an individual who has Administrative privileges.

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

The Roles and permissions page displays.

2. Click **Create role** to create a new role.

The Create role section displays.



The screenshot shows the 'Create role' form with the following fields and options:

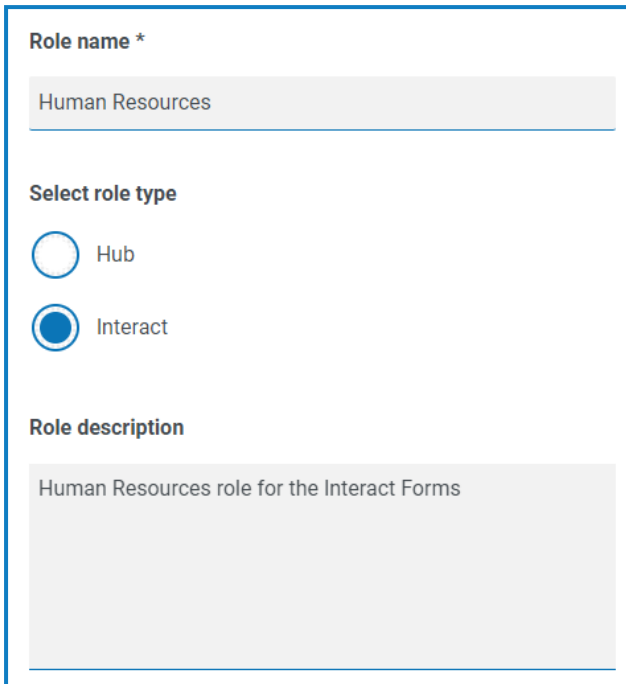
- Role name \***: A text input field.
- Select role type**: Two radio button options: **Hub** (selected) and **Interact**.
- Role description**: A large text area for entering a description.
- Add plugin**: A dropdown menu.
- Add user**: A dropdown menu with the placeholder text 'Type to find another one'.

At the top right of the form, there are three icons: a close button (x), a save button, and a delete button.

Alternatively, you can use an existing role. Find the role you want to use and click **Edit** and then update the information as needed.



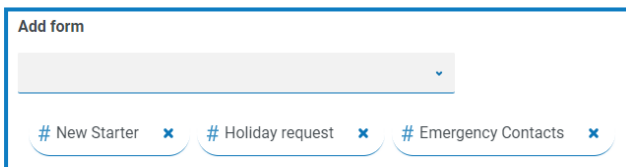
3. Select the **Interact** role type and, if applicable, enter a role name and description.



The screenshot shows a form with three sections:

- Role name \***: A text input field containing "Human Resources".
- Select role type**: Two radio button options. "Hub" is unselected, and "Interact" is selected.
- Role description**: A text area containing "Human Resources role for the Interact Forms".

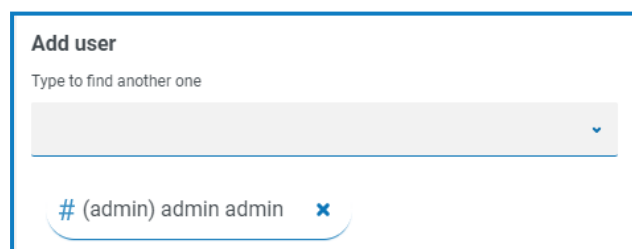
4. Select the form that you want the user role to have access to from the **Add forms** drop-down list. You can select more than one form from the list by selecting a form, clicking out of the drop-down list so that it appears below the field, and then selecting the next form from the drop-down list.



The screenshot shows the "Add form" section with a dropdown menu and three selected items:

- Dropdown menu: Empty.
- Selected items: "# New Starter", "# Holiday request", and "# Emergency Contacts".

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.



The screenshot shows the "Add user" section with a search input and one selected user:

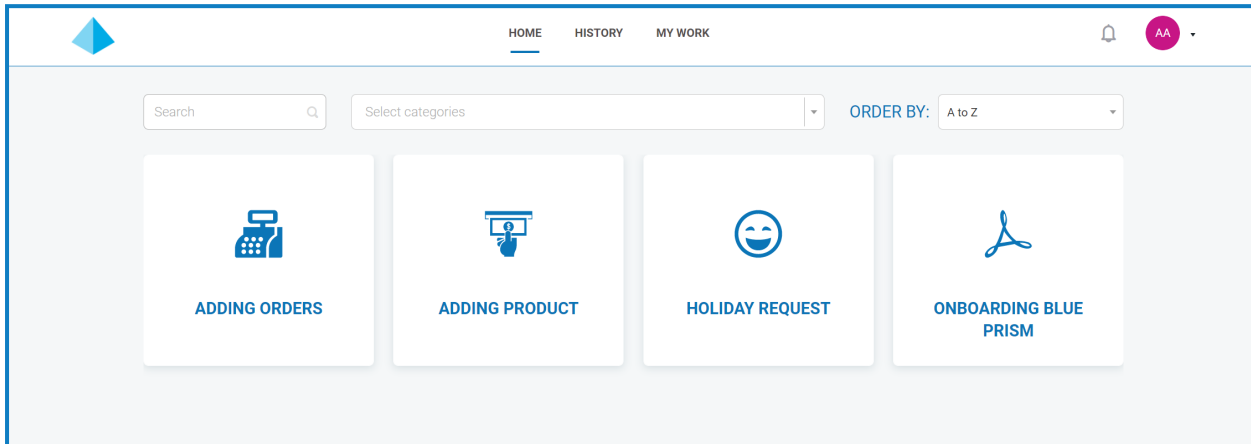
- Search input: "Type to find another one".
- Selected user: "# (admin) admin admin".

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

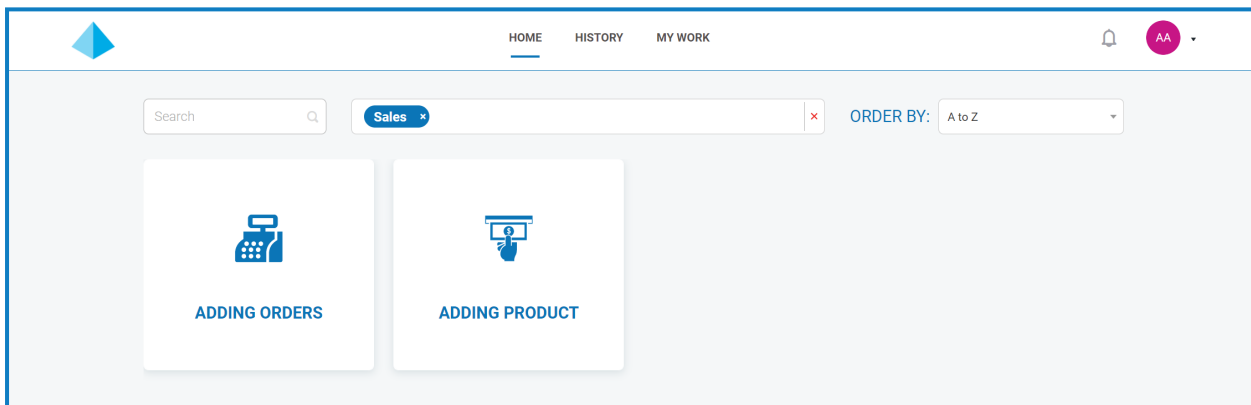
The new role displays in the Roles and permissions page. It is also now available within the Interact user interface for the selected users, where the role acts as a category.

## Using Interact

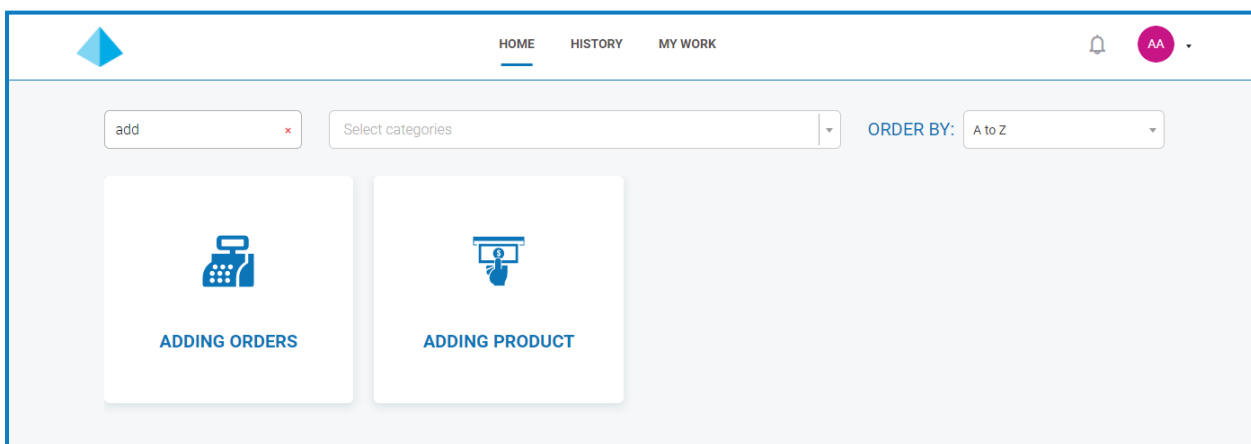
When you first log onto Interact, a list of all of the Interact forms that you have been given access to displays.



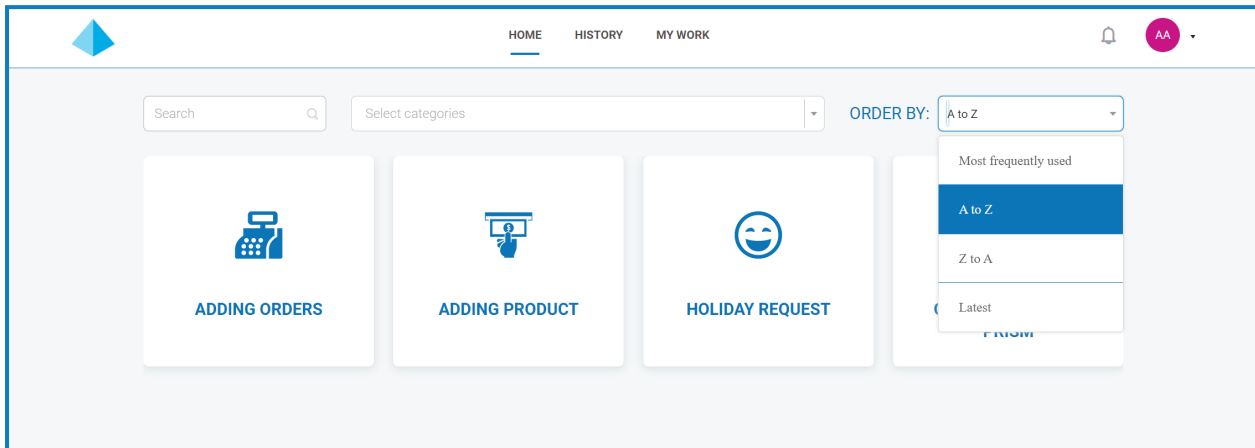
These can be grouped via the categories that were defined on the Roles and permissions page in Hub by selecting a category from the search bar.



Similarly, if you know the name of the form, you can start typing the name of a form in the search field to locate it.



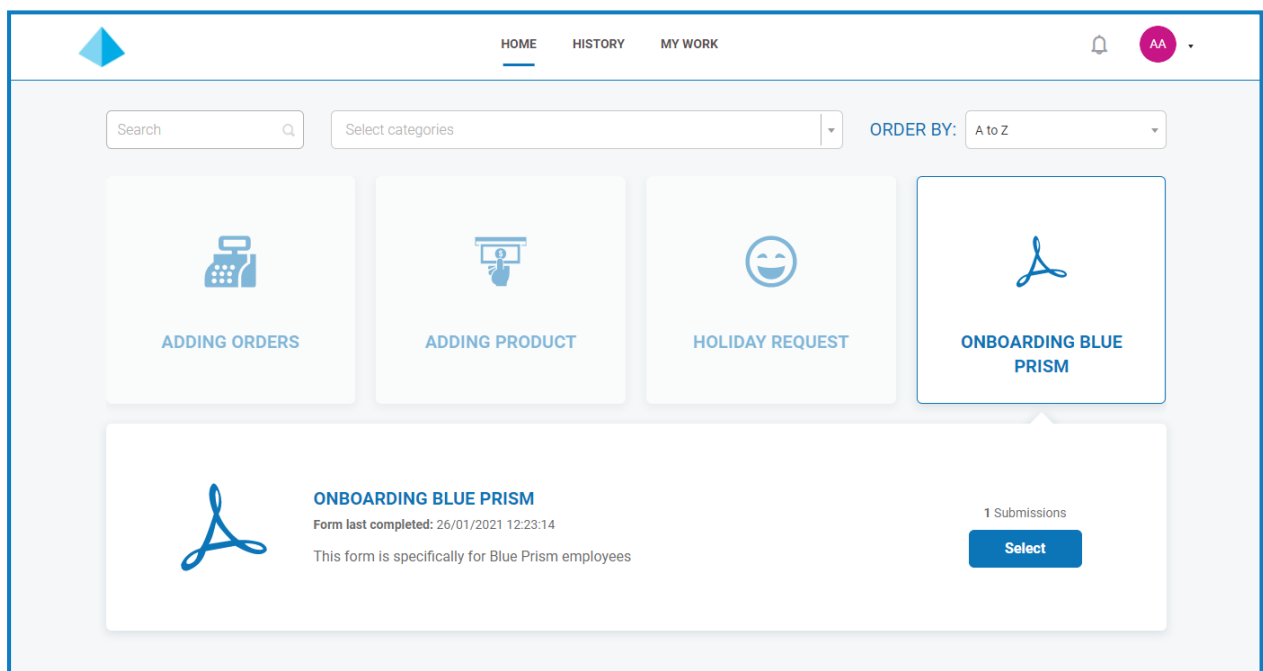
Finally, you can sort the order that the forms are displayed in by selecting a display order using the **Order By** field:



## Submit a form

1. Click on the required form.

Information about the form appears below your selected form.



2. Click **Select** to display the form.

The screenshot shows the 'Employee details' form in the Blue Prism onboarding interface. The form is empty, with fields for First name, Last name, and Region based in (EMEA, APAC, US). A 'Next' button is visible at the bottom right.

3. Complete the form and if there is more than one page, click **Next** to display the next page. Otherwise click **Submit**.

The screenshot shows the 'Employee details' form in the Blue Prism onboarding interface. The form is filled with sample data: First name 'Jonathan', Last name 'Jones', Region based in 'EMEA', and Line Manager 'Lee Bowyer'. A 'Next' button is visible at the bottom right.

4. Once all pages of the form are complete click **Submit**.

Once the Form has been submitted you are returned to the main Interact screen.

5. Select the **History** tab to see all submitted forms.

ID	Form name	Category	Key value	Status	Submission time	Actions
4	Onboard...	Human Resources		Submitted	19/03/2021 17:37:28	...
3	Onboard...	Human Resources		Submitted	26/01/2021 12:23:14	...

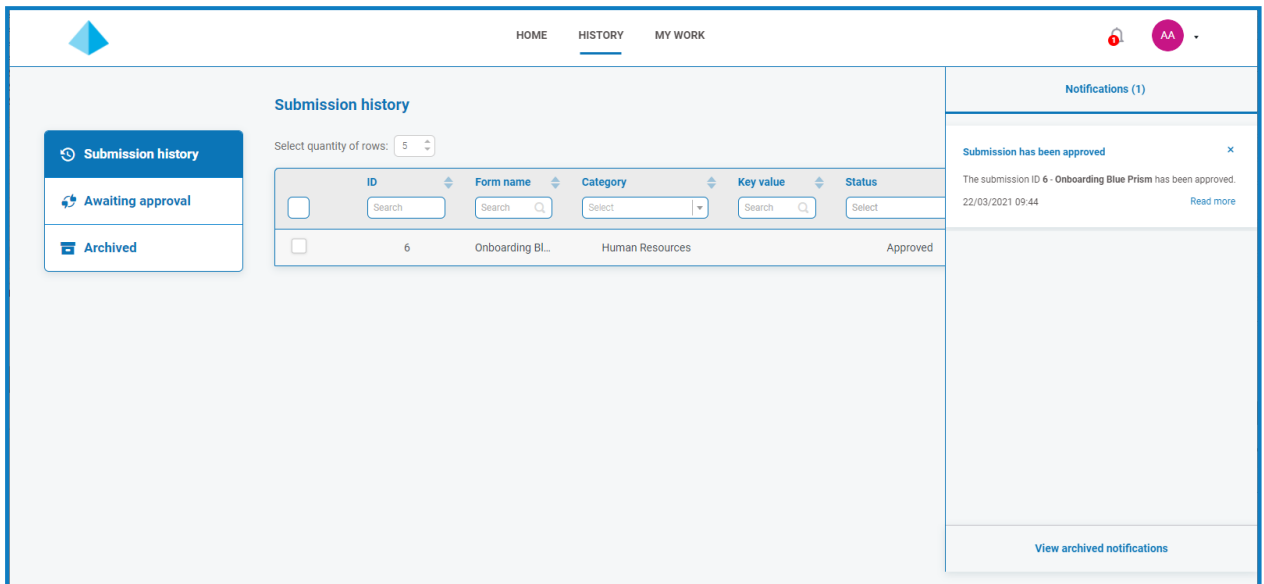
If a field was identified using the **Make Key Field** option when the form was created, this will appear in the **Key Value** column. The submitted request appears in the **Submission history** section of the **History** tab.

If the submitted request needs approving before submission, it will be added to the **Awaiting Approval** section of the **History** tab and the approver will be notified.

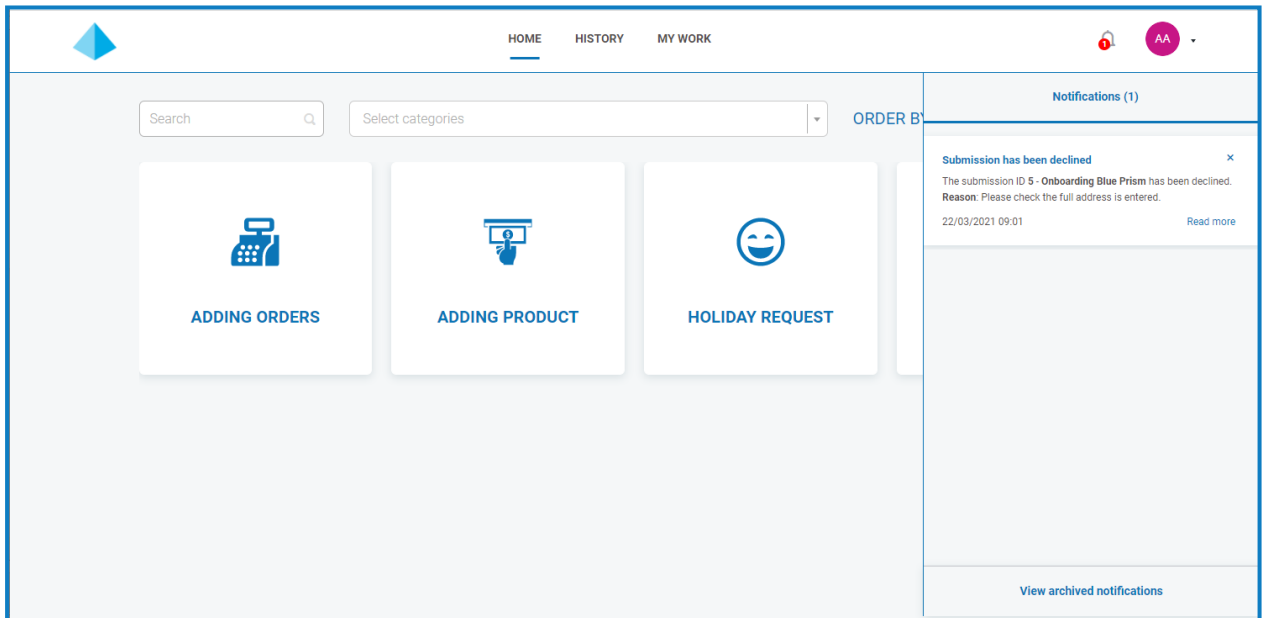
ID	Form name	Category	Key value	Submission time	Actions
5	Onboarding Blue Prism	Human Resources		22/03/2021 08:11:07	...

If the form is:

- Approved** – The form is added to the **Submission history** section of the **History** tab showing the **Status** as **Approved**. A **notification** is received showing that the submission was approved, which can be viewed by clicking the bell icon.



- Declined** – The form is returned to you as the submitter and is added to the **Submission history** section of the **History** tab showing the **Status** as **Declined**. A **notification** is received showing the reason for the decline, which can be viewed by clicking the bell icon.

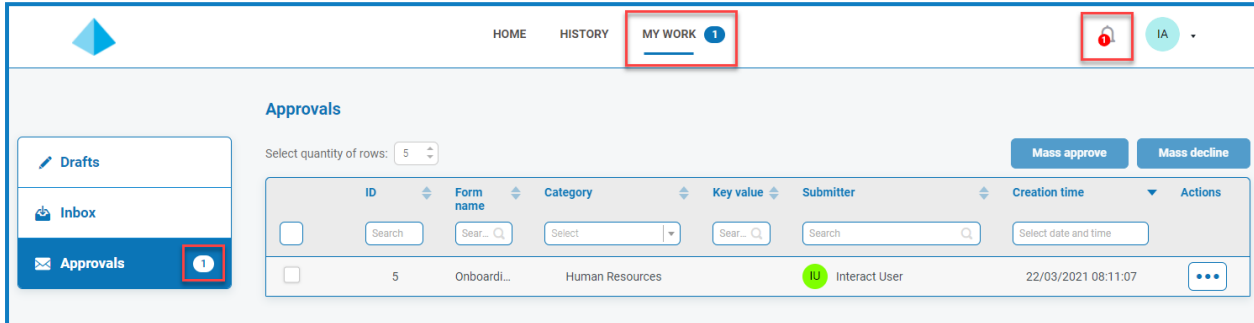


Regardless of the status, if you click the ellipsis (...) next to the form, you have three options available:

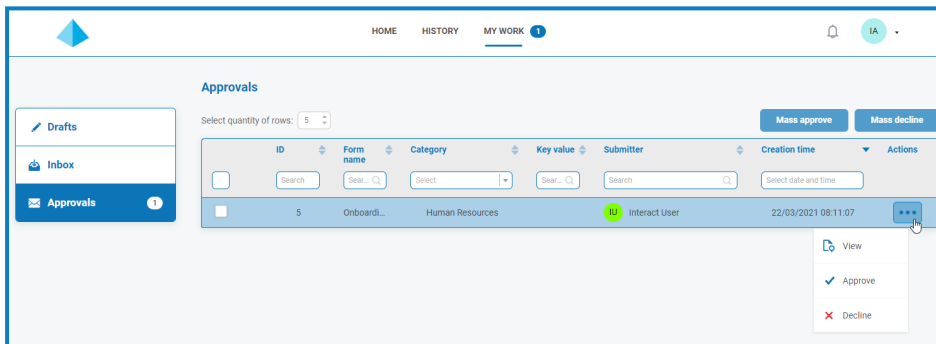
- View** – View the form and the entered information.
- Clone** – This clones the form and allows you to make any changes and then submit it again.
- Archive** – Moves the form to the Archive folder without resubmitting it.

## Approve a form

When forms are submitted for your approval, a notification is received with the approval information, which can be viewed by clicking the bell icon. A flag also displays next to the **My Work** tab and the **Approvals** section on the underlying menu.




1. To view the forms that have require your approval, click **My Work** and then click **Approvals**.
2. To approve or decline an individual form:
  - a. Click the ellipsis (...) to open the approvals menu for the required form.

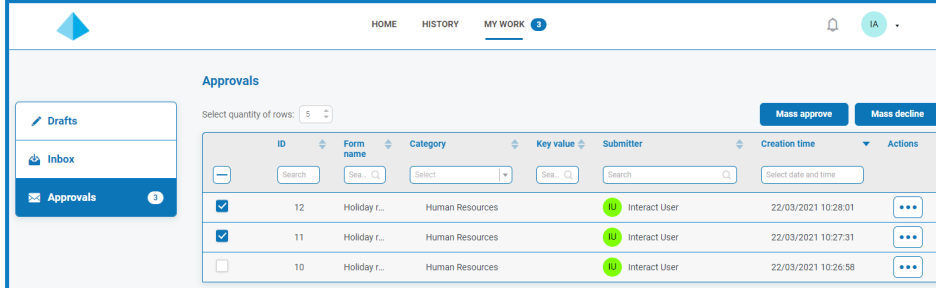


- b. Click the required option:
  - **View** – View the form and the entered information.
  - **Approve** – Approving the request allows the request to be submitted to the queue or email as detailed when the form was created.
  - **Decline** – The request is not submitted to a queue or email. If you decline the form, you are prompted to enter a reason and the form is then returned to the submitter for action.

## 3. To approve or decline multiple forms:

 You should ensure you have reviewed each forms details before you carry out a mass approve.

## a. Select the check box at the start of the row for the forms you want to approve.



ID	Form name	Category	Key value	Submitter	Creation time	Actions
<input checked="" type="checkbox"/>	12	Holiday r...	Human Resources	IU Interact User	22/03/2021 10:28:01	...
<input checked="" type="checkbox"/>	11	Holiday r...	Human Resources	IU Interact User	22/03/2021 10:27:31	...
<input type="checkbox"/>	10	Holiday r...	Human Resources	IU Interact User	22/03/2021 10:26:58	...

b. Click **Mass approve**, or **Mass decline** depending on the action you want to take.

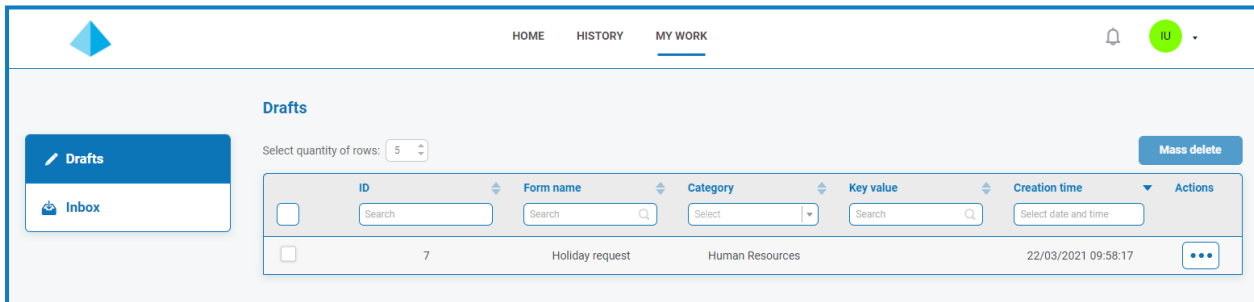
A message displays asking you to confirm.

c. Click **Yes**.

## Save as draft

If you only have some of the information required to complete a form, you can complete the fields you have the information for and then select **Save as draft** to preserve the partially completed form.

The information is stored under the **My Work** tab in the **Drafts** section.



ID	Form name	Category	Key value	Creation time	Actions
<input type="checkbox"/>	7	Holiday request	Human Resources	22/03/2021 09:58:17	...

Once you have the missing information, you can complete the form and then submit the request for processing.

Saving a draft enables you to capture the information you have at that time and then, at a later date, open the draft, complete the submission, and submit, or delete the draft if it is no longer required.

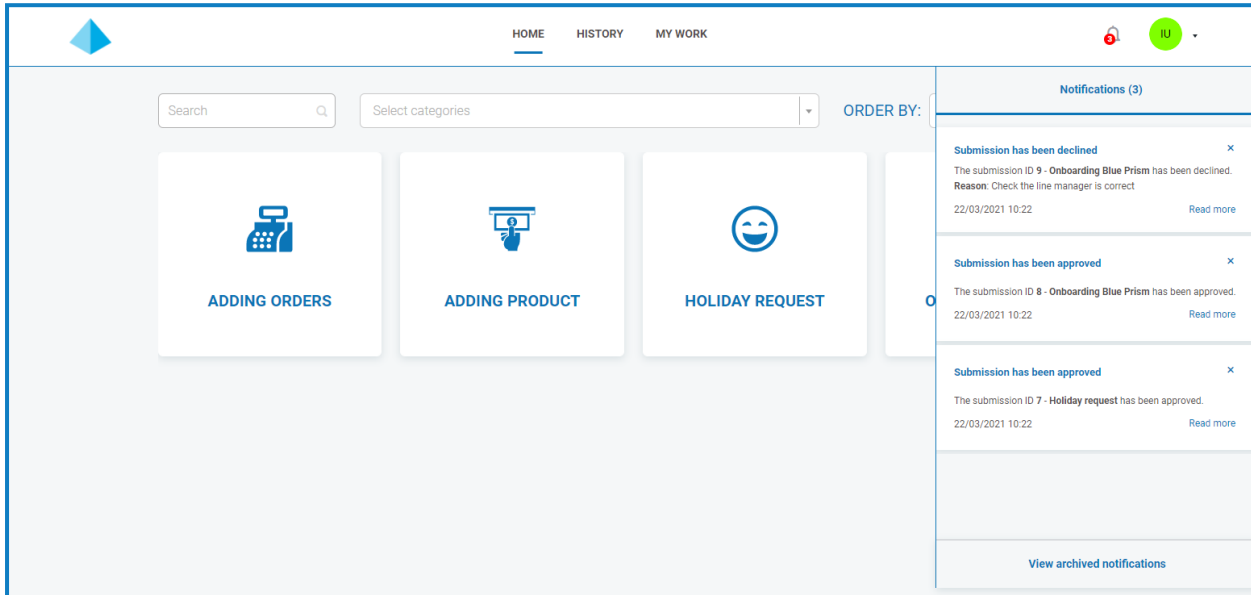
## Updating submissions

The updating of submissions, with information being fed back from Blue Prism, is a dynamic process. You can look at the form as the process is running in Blue Prism and as the information is updated by the process the form is automatically updated. The whole mechanism of updating submissions and setting submissions to a different state, such as moving to the Inbox, is detailed in the [Interact Web API Service User Guide](#).



## Interact notifications

There are several in-built triggers that notify users about specific events. If there are new notifications, the bell icon is annotated with the number of notifications. To view these notifications, click the bell icon located in the top-right corner of your screen. If you have no notifications, the notification panel will be empty.



The table below describes each notification type.

Notification	Trigger	Recipients
Approval required for submission	A user has completed and submitted a form which requires approval.	Interact users who have Approver rights and have been identified as the approvers for that category role, or specific form.
Submission has been approved	The approver has approved the form and it has moved to be processed by the automation.  The form may have been approved directly, or may have been part of a mass approval.	The user who submitted the form.
Submission has been declined	The approver has rejected the form and it has not progressed any further.  The form may have been declined directly, or may have been part of a mass decline.	The user who submitted the form.
Digital Worker has assigned you an Interact form	A digital worker has created a submission and assigned it to a user.	The user who has been assigned the form.

For more information above approvals, see [Approve a form on page 47](#).

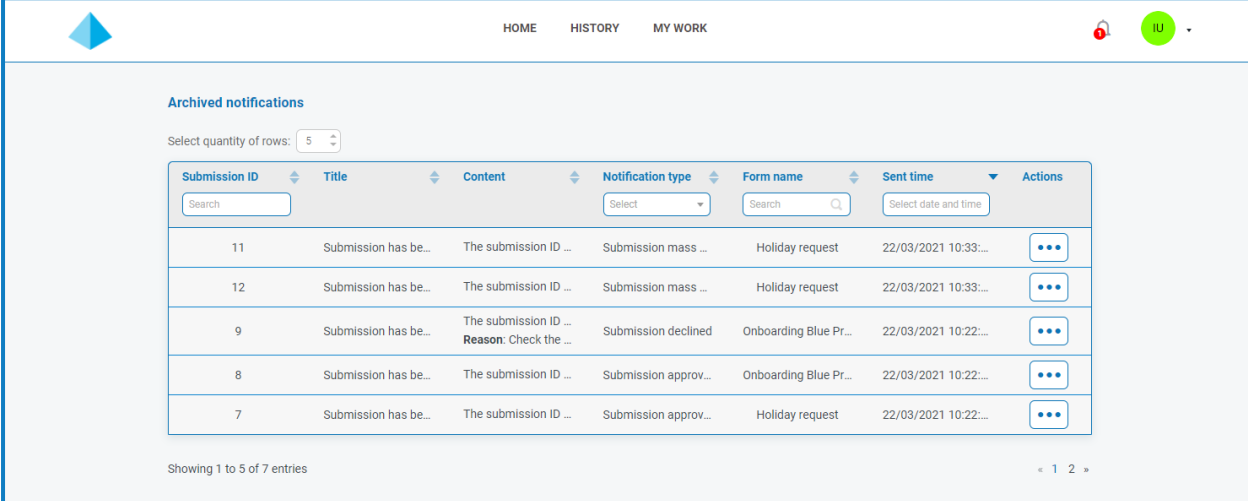
## Archive a notification

You can move the notifications into the archived notification area in two ways:

- Click the X in the corner of the notification to remove it from the notification list and into archived notifications.
- Click **Read more** to read the notification information. This displays a message box with the details. When you close this, the notification is moved to archived notifications.

## View archived notifications

To view the archived notifications, click the bell icon and then click **View archived notifications**.



Archived notifications

Select quantity of rows: 5

Submission ID	Title	Content	Notification type	Form name	Sent time	Actions
11	Submission has be...	The submission ID ...	Submission mass ...	Holiday request	22/03/2021 10:33:...	⋮
12	Submission has be...	The submission ID ...	Submission mass ...	Holiday request	22/03/2021 10:33:...	⋮
9	Submission has be...	The submission ID ... <b>Reason:</b> Check the ...	Submission declined	Onboarding Blue Pr...	22/03/2021 10:22:...	⋮
8	Submission has be...	The submission ID ...	Submission approv...	Onboarding Blue Pr...	22/03/2021 10:22:...	⋮
7	Submission has be...	The submission ID ...	Submission approv...	Holiday request	22/03/2021 10:22:...	⋮

Showing 1 to 5 of 7 entries

< 1 2 >

You can sort and filter the notifications using functionality in the column headings.

## Interact restrictions

The following restrictions apply to the elements of Interact.

### Play test and form renderer

The maximum number of elements on the Play Test and Form Renderer are:


- **Maximum number of fields on one page** – Recommended to be no more than 40 fields per page as the time taken to render the form increases.
- **Maximum number of pages** – Recommended to be no more than 10 pages with a maximum of 30 fields per page. Above this the time to render increases.

### Custom icons for forms

Icons must be a PNG, JPG, or SVG file and cannot be bigger than 256 x 266px and 30KB.

### Form field restrictions

The table below lists the Form Field restrictions.

Field	Datatype	Applicable Restrictions
Descriptions	Text	The descriptions for all field elements are restricted to 150 characters.
Upload element	File attachment – File and Image	<p>By default, the maximum file upload size is restricted to a maximum of 5 Mb and the image size is restricted to 1920 x 1080px.</p> <p>The maximum size can be increased by a system administrator by changing the value defined in the Hub configuration file on the server. The value specified in the <b>Max size</b> field on the Create upload page cannot be greater than the value defined in the configuration file (by default, this is 5).</p> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p> You cannot upload executable files (files with a .exe extension).</p> </div>
Paragraph element	Text	Paragraph elements are restricted to 500 characters.