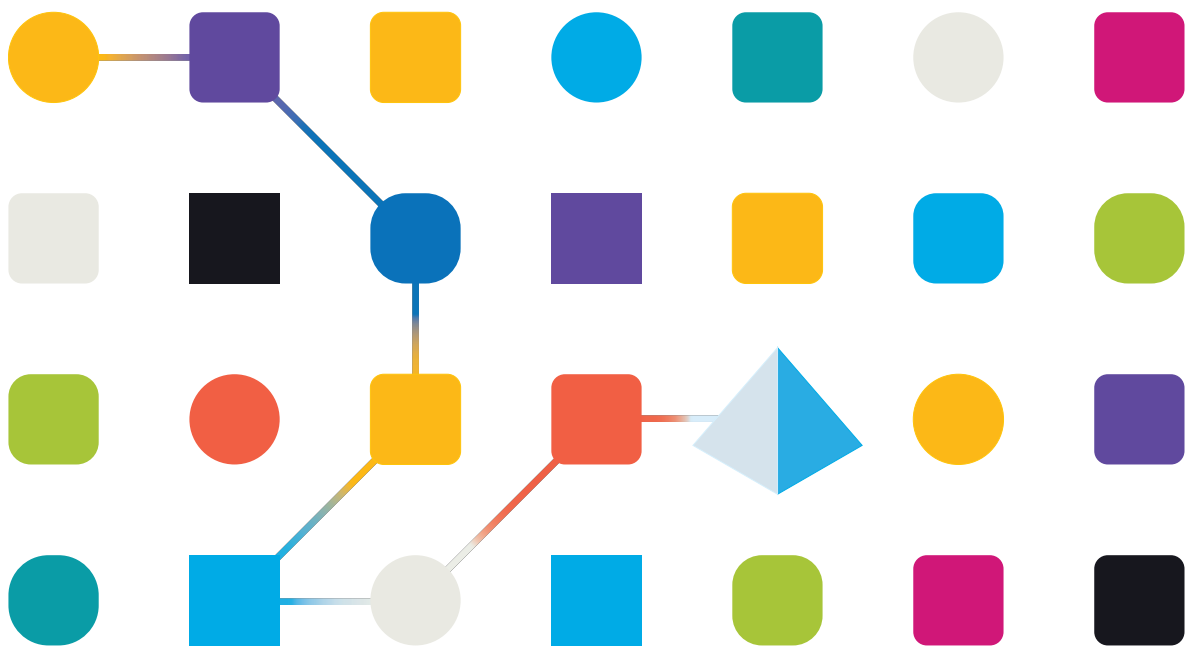




Interact 4.2

Release Notes

Document Revision: 1.2



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Contents

Release Notes	4
Interact 4.2 – April 2021	4
Upgrade Hub and Interact	7
Upgrade Hub and Interact 4.0 to version 4.1	7
Upgrade Hub and Interact 4.1 to version 4.2	8
Troubleshooting upgrades	15
Previous Releases	16
Interact 4.1 – November 2020	16
Interact 4.0 – September 2020	19

Release Notes

Interact 4.2 – April 2021

This release note is for the 4.2 release of Blue Prism Interact (Interact) delivered in an on-premise configuration.

Enhancements

The following new features and enhancements are introduced in this version of Interact.

Area	Description of Change
API	Create Submission and Raise Submission now allow the uploading of files. See Web API Service updates on page 6 .
Application	The Interact user interface has been redesigned.
History	History is a new tab in Interact. The History tab includes submission history, items waiting for approval and archived items.
Localization	The IMS login page and Interact now display in the language compatible with the user's language settings set in their browser. If the user has an unsupported language selected in their browser settings, English is used as the default. If required, the user can manually change the language they want to use from the drop-down list on the login page.
My Work	My Work is a new tab in Interact. This contains Drafts and Inbox.
Notifications	Notifications is a new feature in Interact. The following types of notifications may display: <ul style="list-style-type: none">• My submission has been approved• My submission has been declined• Submission requires approval by you• A Digital Worker has assigned a submission to you As part of this enhancement, archived notifications can also be viewed by clicking the View archived notifications link at the bottom of the notification panel. The archived view allows for the filtering of notifications based on type. For more information, see Interact notifications .
Supported software	Interact now supports the use of Azure SQL Database.

Fixes and improvements

The following fixes and minor improvements are included in this version of Interact.

Area	Description of Change
Application	Interact approvers are now required to provide a reason when declining submissions.

Area	Description of Change
Installer	<p>The following changes have been made to the Interact Installer:</p> <ul style="list-style-type: none">• The screen to install SignalR has been removed, this is now installed as part of the Hub installation.• A screen to configure the IADA SQL connection has been added.

Web API Service updates

The following new features and enhancements are introduced to the Web API Service and the Utility - Interact API Blue Prism VBO in this version of Interact.


Area	Description of Change
Actions	A new Upload File action has been added to the Interact Web API and the Utility - Interact API Blue Prism VBO. Files can now be uploaded and used with the Create Submission and Raise Submission actions.

For more information about the Interact Web API Service, see the [user guide](#).

Upgrade Hub and Interact

Upgrading Hub and Interact is a simple process that uses dedicated tools. You need to run the upgrade tools in the following order, starting with the version you are currently using:

- Upgrade from 4.0 to 4.1.
- Upgrade from 4.1 to 4.2.


 After you have completed the upgrade, advise your users to log into Hub and clear the cache by pressing **CTRL + F5**. This will refresh all web pages and ensure that any user interface changes are updated.

Upgrade Hub and Interact 4.0 to version 4.1

It is recommended that you schedule the upgrade to take place outside of working hours.

Prerequisites

- Version 4.0 of Hub and Interact is installed.
- Everyone is logged out of the IMS Server.
- You have backed up all relevant databases. Although the databases are not impacted by the upgrade, it is recommended that databases are backed up before performing any upgrade.

 The upgrader automatically stops any running websites as part of the upgrade process. You do not need to manually stop them.

Upgrade steps


1. Download the Blue Prism Interact and Hub Upgrader for version 4.0 to 4.1 from the [Blue Prism Portal](#).
2. Run the upgrader and follow the instructions.
3. Once the upgrader has completed, log in to Hub and open the plugin repository.
The repository will show that there are plugins ready to update with details of the currently installed and available versions displayed.
4. Select the **All** check box and click **Complete updating**.
The new versions of the selected plugins are installed and the upgrade to version 4.1 is complete.
5. Repeat the process on all machines on which Hub is installed.

Upgrade Hub and Interact 4.1 to version 4.2

It is recommended that you schedule the upgrade to take place outside of working hours.

Prerequisites

- Version 4.1 of Hub and Interact is installed.
- Everyone is logged out of the IMS Server.
- You have backed up all relevant databases. Although the databases are not impacted by the upgrade, it is recommended that databases are backed up before performing any upgrade.
- You have created DNS records for the License Manager and Notification Center to use during this upgrade. This prerequisite is not required for single machine environments.
- SSL certificates for the new web sites; License Manager and Notification Center. See the [Hub Install Guide](#) for more information about SSL certificates.
- You have sufficient database permissions to configure the new databases created as part of this upgrade, such as, dbcreator or sysadmin.
- 2 GB of free disk space on the server where Hub and/or Interact are installed – This is required for the backup that is created until the installation process is complete.

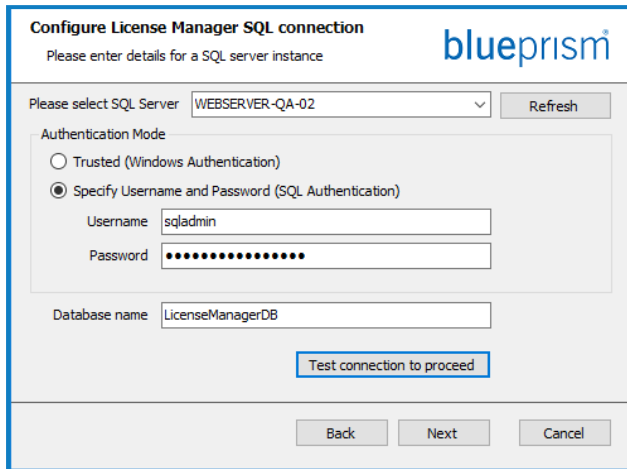
 The upgrader automatically stops any running websites as part of the upgrade process. You do not need to manually stop them.

Upgrade steps

1. Download the Blue Prism Interact and Hub Upgrader for version 4.1 to 4.2 from the [Blue Prism Portal](#).
2. Unzip the installer on the machine where Hub and Interact 4.1 are installed. It contains two files:
 - Blue Prism Interact and Hub Upgrader.exe – The upgrader executable.
 - BluePrismHubAndInteractUpdate4.2.bin – The binary file needed to upgrade to 4.2.These files must be saved in the same directory.
3. Double-click the upgrader executable to start the upgrader wizard, and on the Welcome to the Hub and Interact Upgrader screen, click **Next**.
4. On the End-User License Agreement screen, read the End-User License Agreement and, if you

agree to the terms, select the check box and click **Next**.


5. On the Configure License Manager SQL connection screen:



a. Configure the settings for the License Manager database by providing the SQL Server host name or IP address, and the credentials for the account to create the database:

- If **Windows Authentication** is selected, the account must have the appropriate permissions.
- If **SQL Authentication** is selected, enter the username and password.

Confirm that **SQL Authentication** is selected, and enter the username and password.

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

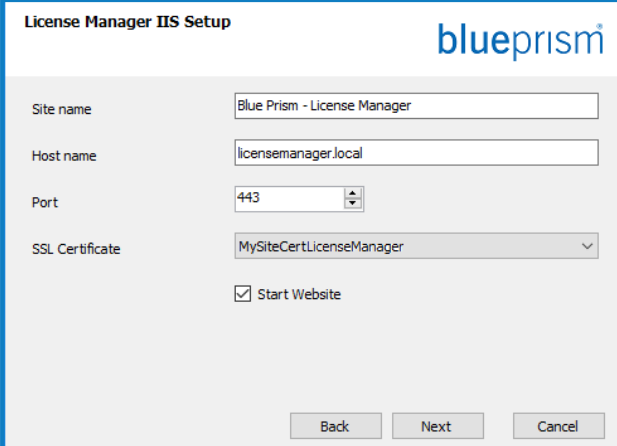
The database name can be left as the default value or changed as required.

b. Click **Test connection to proceed** to test the SQL credentials and verify connectivity.

A notification will display the result of the test. You will only be able to move on to the next step if the test is successful.

c. Click **Next**.

6. On the License Manager IIS setup screen:




The screenshot shows the 'License Manager IIS Setup' dialog box. It has a title bar with the text 'License Manager IIS Setup' and the 'blueprism' logo. The dialog contains the following fields and controls:

- Site name:** A text box containing 'Blue Prism - License Manager'.
- Host name:** A text box containing 'licensemanager.local'.
- Port:** A spinner box set to '443'.
- SSL Certificate:** A dropdown menu showing 'MySiteCert.LicenseManager'.
- Start Website:** A checked checkbox.
- Buttons:** 'Back', 'Next', and 'Cancel' buttons at the bottom right.

a. Configure the License Manager website.

You need to:

- Enter a site name.
- Enter a host name in lowercase characters – This will be used as the URL for the site. The first part of the default host name must not be changed. You can only change the `.local` part of the host name. Ensure that you consider your DNS and Domain structure when choosing a host name.

 The use of uppercase characters in URLs is not supported.

- Enter the port number.
- Select the appropriate SSL certificate.
- Select **The One Cert** SSL certificate.
- Leave **Start Website** selected, unless you do not want the website to automatically start at the end of the installation.

b. Click **Next**.

7. On the Notification Center SQL connection screen:

Configure Notification Center SQL connection
Please enter details for a SQL server instance

Please select SQL Server: WEBSERVER-QA-02 Refresh

Authentication Mode

☐ Trusted (Windows Authentication)

☒ Specify Username and Password (SQL Authentication)

Username: sqladmin

Password: [masked]

Database name: NotificationCenterDB


Test connection to proceed

Back Next Cancel

- a. Configure the settings for the Notification Center database by providing the SQL Server host name or IP address, and the credentials for the account to create the database:

- If **Windows Authentication** is selected, the account must have the appropriate permissions.
- If **SQL Authentication** is selected, enter the username and password.

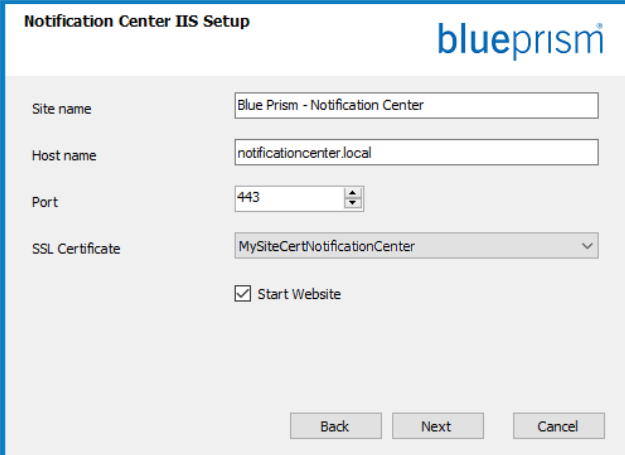
Confirm that **SQL Authentication** is selected, and enter the username and password.

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

The database name can be left as the default value or changed as required.

- b. Click **Test connection to proceed** to test the SQL credentials and verify connectivity.
A notification will display the result of the test. You will only be able to move on to the next step if the test is successful.
- c. Click **Next**.


8. On the Notification Center IIS setup screen:



a. Configure the Notification Center website.

You need to:

- Enter a site name.
- Enter a host name in lowercase characters – This will be used as the URL for the site. The first part of the default host name must not be changed. You can only change the *.local* part of the host name. Ensure that you consider your DNS and Domain structure when choosing a host name.

 The use of uppercase characters in URLs is not supported.

- Enter the port number.
- Select the appropriate SSL certificate.
- Select **The One Cert** SSL certificate.
- Leave **Start Website** selected, unless you do not want the website to automatically start at the end of the installation.


b. Click **Next**.

9. On the Configure IADA SQL configuration screen:

a. Configure the settings for IADA by providing the SQL Server host name or IP address, and the credentials for the account to create the database:

- If **Windows Authentication** is selected, the account must have the appropriate permissions.
- If **SQL Authentication** is selected, enter the username and password.

Confirm that **SQL Authentication** is selected, and enter the username and password.

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

The database name can be left as the default value or changed as required.

b. Click **Test connection to proceed** to test the SQL credentials and verify connectivity.

A notification will display the result of the test. You will only be able to move on to the next step if the test is successful.

c. Click **Next**.

10. On the Ready for Upgrade to 4.2 screen, click **Next** to upgrade Hub and Interact to 4.2.

11. On the Completed the Blue Prism Hub and Blue Prism Interact upgrade screen:

- When the upgrade completes successfully, click **Finish**.
- If the installation failed, the **View Log** option will give you details of the error that was encountered. For more information, see [Troubleshooting upgrades](#).

12. Ensure the database permissions for the new databases are:

Application name	Example service account name for SQL Windows Authentication	SQL Server permissions required during installation	Database permissions required during application running	Default database name
Blue Prism - Notification Center	IIS APPPOOL\Blue Prism – Notification Center	dbcreator / sysadmin	db_datawriter / db_datareader	NotificationCenterDB
Blue Prism - License Manager	IIS APPPOOL\Blue Prism – License Manager	dbcreator / sysadmin	db_owner Or db_datawriter / db_datareader with execute permissions (see below)	LicenseManagerDB

When the application is running, the License Manager requires appropriate permissions to execute stored procedures. If you do not want to use db_owner as the permission level, you can use db_datawriter/db_datareader and run the following SQL script to provide the required level to that user:


```
USE [LicenseManagerDB]
GRANT EXECUTE to "IIS APPPOOL\Blue Prism - License Manager"
```

Where:

- [LicenseManagerDB] is the database name for License manager.
- "IIS APPPOOL\Blue Prism - License Manager" is the username.

13. If using Windows Authentication:

- Change the Application Pools Identity of the newly installed License Manager and Notification Center to match the Application Pools that already exist for Hub and Interact.
- Give the Identity, under which the IIS pools run, access to the BPC_SQL_CERTIFICATE certificate. To do this, open Manage Computer Certificates from the Windows taskbar. In the Personal folder, right-click the certificate and select **All tasks > Manage Private Keys**. Add the user that matches the Identity and give the user Full control.

 Access to this certificate is required by Identity running the Blue Prism – Hub and Blue Prism – IADA Application Pools.


- Check the file permission is set to Full Control for the service account on the new folders:
 - C:\Program Files (x86)\Blue Prism\Notification Center
 - C:\Program Files (x86)\Blue Prism\License Manager.

14. Restart the RabbitMQ Service.

15. Restart all Application Pools.

16. Restart IIS.

17. Repeat the process on all machines on which Hub is installed.

 The plugins are automatically updated to the latest version as part of the upgrade process.

Troubleshooting upgrades

The upgrade says it ended prematurely, what happens now.

The upgrade process has been designed so that if a failure is encountered, it rolls back the install and reinstates the version you were upgrading from. During the upgrade, the folder *backup_4.n* is created in the installation location (by default, C:\Program Files (x86)\Blue Prism\), where *4.n* reflects the existing version number. This contains a copy of the existing installed files and is used as the roll back source if an error is encountered during the installation.

You can try running the upgrader again. Before retrying an upgrade, read any error messages and log files created during the upgrade and ensure any issues have been addressed before attempting the upgrade again.

If this issue persists, please contact Blue Prism Support.

I have upgraded to version 4.2 but the 4.1 user interface still displays.

If this is encountered, clear your browser cache and reload the page.

I have upgraded from 4.1, however, none of my new queues are being created.

This is likely due to the quorum queue feature not being enabled in RabbitMQ. If you check the Hub logs, you will see the error "*the 'quorum_queue' feature is disabled*".

1. On the Message Broker server, run the RabbitMQ command:

```
rabbitmqctl enable_feature_flag quorum_queue
```

2. On the Hub web server, restart the application pools.

The queues are created.

Following an upgrade, when I attempt to log into Interact or Hub, I am seeing an error related to SignalR about overloading the web server in IIS.

This error is very rare but if it does occur, reload the site and restart the application pools in IIS.

I canceled an installation during the upgrade process and I am now seeing errors.

It is recommended that installations are not canceled during the upgrade process. However, although errors may be seen, the rollback operation will complete successfully.

Previous Releases

Interact 4.1 – November 2020

This release note is for the 4.1 release of Blue Prism Interact (Interact) delivered in an on-premise configuration.

Upgrading

The Blue Prism Interact and Hub Upgrader can be downloaded from the customer portal. This easy-to-use tool will upgrade 4.0 to 4.1. For more information, see [Upgrade Hub and Interact on page 7](#).

Enhancements

The following new features and enhancements are introduced in this version of Interact.

Area	Description of Change
API	<p>Two new APIs have been introduced:</p> <ul style="list-style-type: none">• Raise Submission – This enables the Digital Worker to raise a submission on behalf of an Interact user. This fundamentally enhances the human-to-Digital Worker collaboration.• Get User by Form Access – This enables the Digital Worker to view the different users who have access to a specified form. This is required by the new Raise Submission API detailed above.
Forms	<p>When an Interact form is submitted to a work queue, the details of the submitter are now included. The submitter's information can be used as part of an automation. This information includes the users Hub ID, username, first name and last name.</p>
Installer	<p>The following enhancements have been made to the Interact installer:</p> <ul style="list-style-type: none">• Display API key on screen – At the end of the installation, the Interact Remote API secret key displays and can be copied to the users' clipboard. This key is used to set up the Interact APIs in Blue Prism. The key will still be stored in the installation root directory.• Enhanced SQL screens:<ul style="list-style-type: none">• Test connection button – This ensures that the information entered establishes a successful SQL connection. The installation cannot progress to the next step without a successful connection.• Inherited values from the previous SQL screen – This prevents the user from having to enter the same SQL information across multiple screens.

Fixes and improvements

The following fixes and minor improvements are included in this version of Interact.

Area	Description of Change
Installer	<p>The following improvements have been made to the Interact installer:</p> <ul style="list-style-type: none">• Increased maximum number of users – Previously the maximum pool size used the default value. The maximum pool size has now been set to 500, thus allowing more users.• Legal and visual enhancements:<ul style="list-style-type: none">• The End-User License Agreement (EULA) has been reformatted.• The publisher name has been updated to "Blue Prism Limited" throughout the installer.

Web API Service updates

As part of this release of Interact, the Interact API Service release file has been updated to version 1.2.1.

The following new features and enhancements are introduced to the Web API Service and the Utility - Interact API Blue Prism VBO in this version of Interact.

Area	Description of Change
Actions	<p>Version 1.2.1 contains the following new actions:</p> <ul style="list-style-type: none">• Raise Submission• Get Users by Form Name <p>The following actions are only shown in the Utility - Interact API VBO and map to the Update Config action (Change actions) and the Update Status action (Move actions) in the Web API Service:</p> <ul style="list-style-type: none">• Change Field State to Optional• Change Field State to Mandatory• Change Field State to Read Only• Change Field State to Hidden• Change Page State to Visible• Change Page State to Hidden• Move Submission to History• Move Submission to Approved• Move Submission to Review• Move Submission to Declined• Move Submission to Draft• Move Submission to Inbox• Move Submission to Archived

Area	Description of Change
Actions	<p>The following actions in the Utility - Interact API VBO have been replaced by the actions above:</p> <ul style="list-style-type: none">• Update Config• Update Status <p>These two actions will be removed in a future release.</p>

For more information about the Interact Web API Service, see the [user guide](#).

Known issues

A list of any prominent issues with this release is maintained in the knowledge base, click [here](#) for more information.

Interact 4.0 – September 2020

This release note is for the 4.0 release of Blue Prism Interact (Interact) delivered in an on-premise configuration.

Important notices

Please review the [limitations](#) section before installing this release.

Enhancements

The following new features and enhancements are introduced in this version of Interact.

Description
Interact has been migrated to .NET Core 3.1 to ensure supportability.
A new inbox feature has been added to the Submission tab. The inbox is the location which enables human/Digital Worker collaboration. A submission is moved to the inbox through using the Interact Web API service, this in turn allows a user (human) to work collaboratively with the Digital Worker, responding by updating requested information and reviewing returned content.
The Interact installer has been added to manage and coordinate the installation process. Previous the installation required a Blue Prism consultant.
To increase security, code obfuscation has been introduced into Interact in this release.
All sensitive information in appsettings.json for Interact is now encoded.
Load balancing infrastructures are now supported in Interact.

Fixes and Improvements

The table below list the fixes and improvements made to this release of Interact.

Description
To support the on-premise version of Interact, the cloud services have been deprecated and alternatives such as RabbitMQ message broker and file services.
The font face has changed in the user interface to Roboto for all languages except Japanese which uses the Kento font.

Limitations

The table below list the limitations within this release of Interact.

Theme	Description	Workaround
IADA	Number elements are delivered as 'Text' format into a Blue Prism queue	Cast to Number once inside Blue Prism
Get Submission	Number elements are delivered as 'Text' format when using the Get Submission Web API Service	Cast to Number once inside Blue Prism

Theme	Description	Workaround
Get Submission	Retrieving a Date element using the Get Submission Web API Service, returns the Date in 'DateTime' format	Cast to Text once inside Blue Prism. The use of Text is recommended to support the different Date formats within Interact
Create Submission	When creating a new submission using the Web API Service the submission will not be successful if a Number element is left blank	Submit Number element fields with a number set
Create Submission	When creating a new submission using the Web API Service the submission will not be successful if a Radio Group element is left blank	Submit Radio Group element fields with a value set
Create Submission	When creating a new submission using the Web API Service you cannot send anything back when using the Upload element	None, roadmap feature
Edit Submission	When editing a submission using the Web API Service you cannot send anything back when using the Upload element	None, roadmap feature
Interact Form Priority and SLA	Though the Priority and SLA can be set in the Interact Form creator, they have no significance in this release as IADA 'Get Next Prioritized Item' (GNPI) function is not available in an on-premise configuration.	Not applicable
Rules	Rules are not enforced when updating Interact Forms from Blue Prism. For example, a rule that reveals a hidden field when a flag is set, will not be initiated if the flag is set correctly when updated. If the field is not read-only a user can click in the field and then click elsewhere in the Form to see the Rule applied	You can use the Update Config Action in the Interact API Object to replace some rules.
Verification	Regex and other verification such as character string lengths are not enforced when updating Interact Forms from Blue Prism. If the field is not read-only a user can click in the field and then click elsewhere in the Form to see the Rule applied	None

To utilize these new features and functionality please see the Interact user guide.