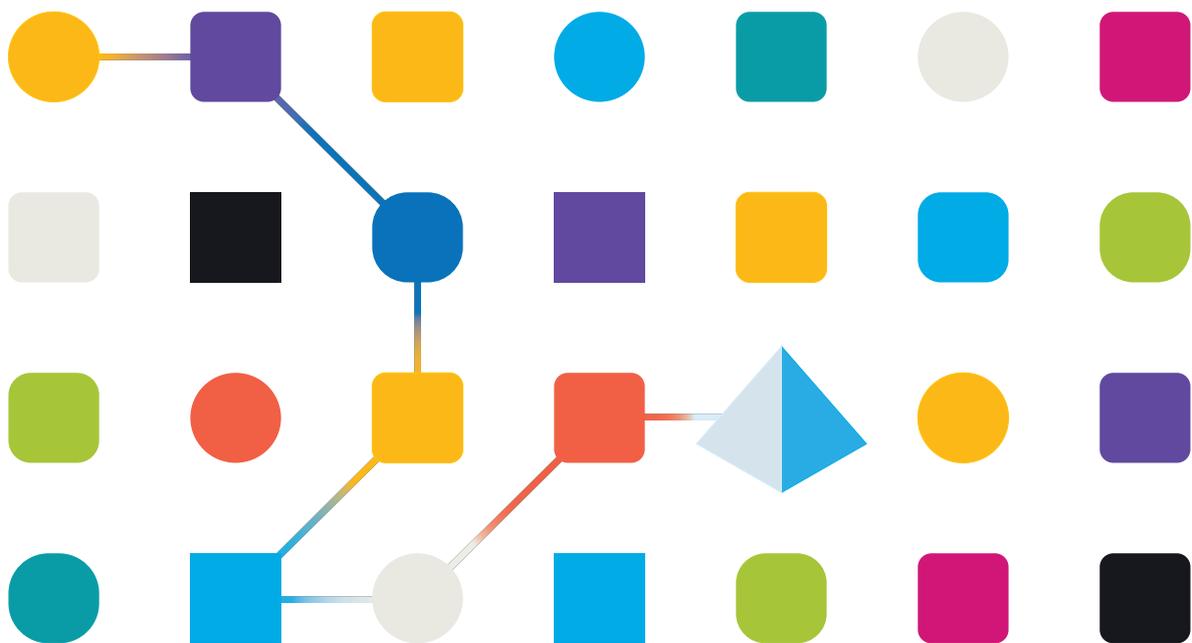


# blueprism<sup>®</sup>

## Automation Lifecycle Management 4.3

### User Guide

Document Revision: 1.1



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## Automation Lifecycle Management (ALM)

This guide outlines functionality and usage of the Automation Lifecycle plugin. By utilizing ALM, business analysts can capture and document the business process definitions along with the applicable applications and any business exceptions. It is assumed as part of this guide that the user is familiar with Blue Prism digital workers and has experience with components such as Hub and Blue Prism.

### Overview

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, usability has been equally considered during the delivery cycle, ensuring enterprises are provided with guard rails to ensure best practices are met. The Robotic Process Automation (RPA) and Intelligent Automation (IA) industry has a multitude of methodologies and operating models however these are contained in documents and training materials only. With the development of Blue Prism Automation Lifecycle Management (ALM) capability within Blue Prism® Hub, enterprises early on in their RPA/IA journey can benefit from application driven controls to ensure the key milestones of a successful delivery are met.

## Installation and access

To access Automation Lifecycle Management (ALM), the Automation Lifecycle plugin must be installed by an administrator.

**Automation lifecycle** Details

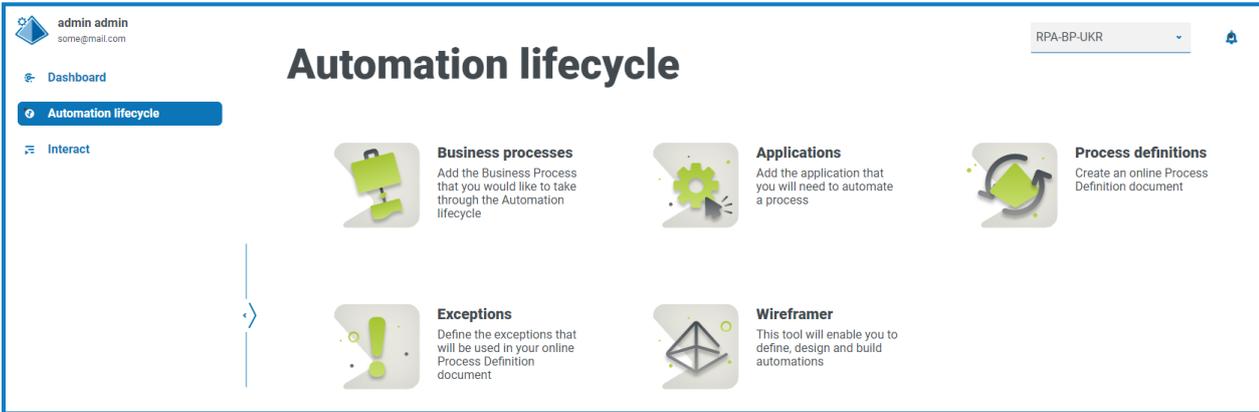
Automation Lifecycle Management (ALM) enables you to manage and deploy (using ...

Dependencies: **4.2.0.68**  
Connect.Core [4.2.0.68] Version  
Connect.Core.Data [4.2.0.68]

Once the plugin has been installed, it needs to be added to a role and a user then assigned to that role. The plugin can be assigned to the default user role if required or a custom role can be created.

For more information about installing plugins and configuring roles, see the [Hub user guide](#).

ALM is accessible through the Automation Lifecycle menu from the sidebar menu.



The following options are available:

- [Business Processes](#)
- [Applications](#)
- [Process Definitions](#)
- [Exceptions](#)
- [Wireframer](#), see the [Wireframer user guide](#) for more information.

 To use the full functionality of Wireframer, Blue Prism 6.4.0 or later is required.

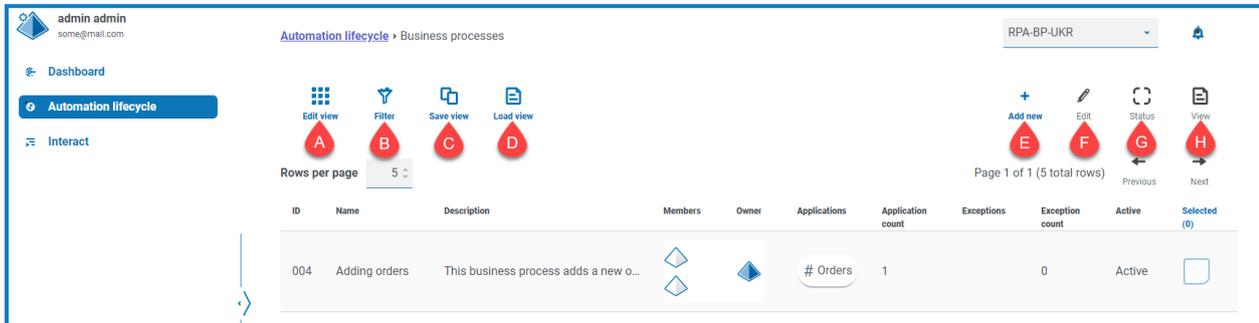
The typical flow through the Automation Lifecycle Management functions is as follows:

1. Identify the organization's business processes and determine whether they are suitable candidates for automation.
2. Capture the applications that these processes use.
3. Define the process using process definitions.
4. Capture the low-level steps of the process.
5. Exceptions that may apply to one or more of the business processes is performed.

Though this is a typical flow, once several items have been captured and defined, ALM allows the reuse of parts of a process. This means that common elements can be defined as templates and reused as required. For example, the login process into say Salesforce is the same whether you are creating a new user or creating a new account. Therefore, the defined process steps for *Login to Salesforce* can be defined as a template and used in both processes.

## Business processes

The **Business processes** option allows you to define the business processes within your organization. Once the business processes have been created, they can be viewed, edited or retired using the icons on the page.



The Business processes 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 then turn on the [required filters](#) and enter or select the appropriate information for display, for example, you could turn on the **Active** filter. By default, the filters are set to show you only your business processes. If you want to see them all, you must change the **Business processes** filter to all.
- 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 business process](#).
- F. **Edit** – [Edit the details](#) of the selected business process.
- G. **Status** – This icon changes when you select a business process based on the [status of the business process](#).
- H. **View** – View the details of the selected business process.

## Add a business process

1. On the Automation lifecycle page, click **Business processes**, and then click **Add new**.
2. On the Create business process page, in the Basic section, add the required basic information about the business process:
  - **ID** – A unique number to identify the business process. Companies can define their own identification system which could assist in identification of processes for different departments, for example, Finance, Sales, and so on, or just a unique identification across the organization's processes generally.
  - **Name** – A name for the business process.
  - **Descriptions** – An optional description of the business process.
  - **Stage** – The stages involved in capturing the business process:
    - Process Selection, (default option)
    - Deep Dive
    - Design
    - Development
    - Internal UAT
    - External UAT
    - Live Proving
    - Live
  - **Stage Progression** – A slider that allows you to set how much of the stage has been completed as a percentage.
3. In the Members section, add any key stakeholders that will contribute towards the automation of the business process throughout the lifecycle. If you create a business process, you will be automatically added as a member.
4. In the Notes section, add information about the business process. Only the person who created the business process will have write privileges, everyone else will only have read privileges.
5. Click **Create business process**.

If the business process has been successfully created, a notification displays in the top right corner.

## Edit a business process

1. On the Business processes page, select the check box for the required application.
2. Click **Edit**.
3. Edit the information as required.
4. Click **Save**.

## Retire and reinstate a business process

If you retire a business process, any process definitions associated with the business process are also retired.

1. On the Business processes page, select the check box for the required business process.

If the process is:

- Live, the Status icon changes to Retire.
- Retired, the Status icon changes to Make Live.

ID	Name	Description	Members	Owner	Applications	Application count	Exceptions	Exception count	Active	Stage	Stage progression	Selected (1)
006	Add Order				# Orders	1		0	Active	Process selection	<input type="text"/>	<input type="checkbox"/>
004	Adding orders	This business process adds a new o...			# Orders	1		0	Active	Process selection	<input type="text"/>	<input checked="" type="checkbox"/>
005	Adding product					0		0	Active	Development	<input type="text"/>	<input type="checkbox"/>

2. To retire a business process:

- a. Click **Retire**.

A message displays asking you to confirm.

- b. Click **Yes**.

The business process is retired and the Retire icon changes to Make Live.

3. To make a retired business process live, click **Make Live**.

The business process is instantly reinstated and the Make Live icon changes to Retire.



You can use the **Active** filter to filter the list for retired business processes.

## Use the filters on the Business processes page

The filters enable you to easily find a specific business process or similar processes based on the selected criteria.

1. On the Business processes page, click **Filter** to open the Filter panel.
2. Use the toggle to turn on the required filter and complete the information to find the required business process. You can apply multiple filters at the same time.

The available filters are:

Filter	Description
<b>Business processes</b>	<p>Select the business processes you want to view from the drop-down list; the options are:</p> <ul style="list-style-type: none"> <li>• <b>My business processes</b> – Displays the business processes of which you are an owner or a member.</li> <li>• <b>All business processes</b> – Displays all the business processes that are available.</li> </ul> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p> By default, the <b>Business processes</b> filter is already turned on and set to <b>My business processes</b>.</p> </div>
<b>ID</b>	Enter the full or partial identifier for the business process.
<b>Name</b>	Enter the full or partial name of the business process.
<b>Description</b>	Enter a term or word to search against the text in the business process description.
<b>Members</b>	Enter the user's username, or part of their username.
<b>Owner</b>	Enter the user's username, or part of their username.
<b>Applications</b>	Enter the full or partial name of the application to see the business processes that are linked with that <a href="#">application</a> .
<b>Application count</b>	Enter a numerical range. If you want to see business processes that are linked with a set number of applications, enter the same number in both fields, for example, 1.
<b>Exceptions</b>	Enter the full or partial name of the exception.
<b>Exception count</b>	Enter a numerical range. If you want to see business processes that are linked to a specific number of exceptions, enter the same number in both fields, for example, 10.
<b>Active</b>	<p>Select the status of the business process from the following options:</p> <ul style="list-style-type: none"> <li>• <b>Active</b> – Displays the active business processes; these are processes that have not been retired.</li> <li>• <b>Retired</b> – Displays the business processes that have been retired by an administrator.</li> </ul>

Filter	Description
<b>Stage</b>	Select the stage from the drop-down list. The available options are the same as those available when adding the business process. For more information, see <a href="#">Add a business process on page 7</a> .
<b>Stage progression</b>	Enter a numerical range reflecting the stage progression percentage. For example, enter 0 in the first field and 50 in the second field to view all stage progression percentages under 50%.

The information on the Business processes page is immediately filtered.



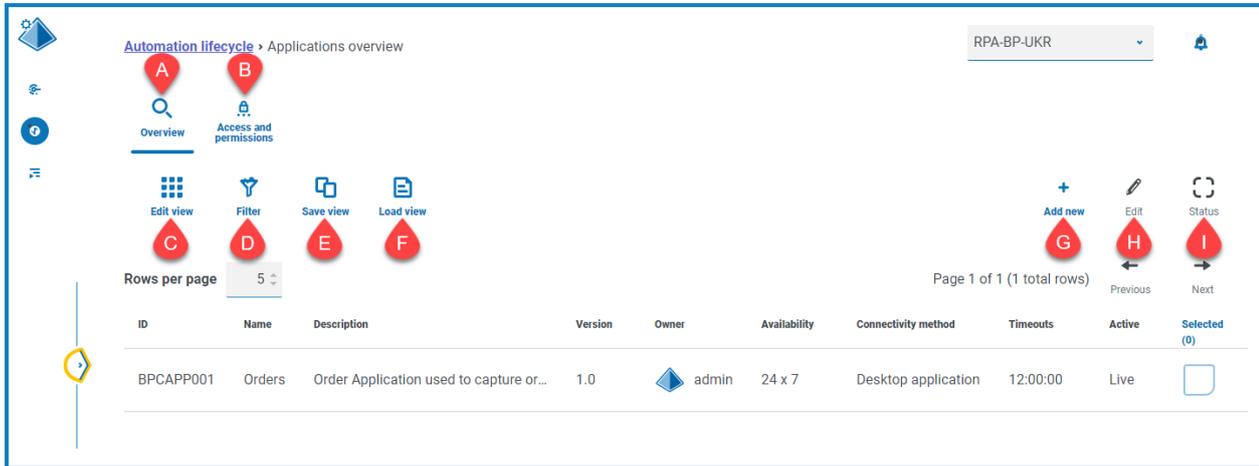
If you have set the filters but want to view the unfiltered information again, either turn off the required filters, or remove any settings within the filter so that it is blank.

3. Click **Close drawer** to close the filter panel.

## Applications

The **Applications** option allows the definition of applications.

Once an application have been created, it can be viewed, edited or retired using the icons on the page.



The Applications overview page provides you with the following information and functions:

- A. **Overview** – Changes the view to the Applications overview page. This shows the applications that have been defined within ALM. This is the default view.
- B. **Access and permissions** – Changes the view to the [access rights and permissions](#) page.
- C. **Edit view** – Define the columns that are displayed. You can then show or hide the columns using the toggle switches.
- D. **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 **Active** filter.
- E. **Save view** – Save your current column settings. You can enter a name for your view to make it easily identifiable when loading views.
- F. **Load view** – Load a saved view. You can select the required view and click **Apply**.
- G. **Add new** – Add a [new application](#).
- H. **Edit** – [Edit the details](#) of the selected application.
- I. **Status** – This icon changes when you select an application based on the [status of the application](#).

## Add an application

1. On the Automation lifecycle page, click **Applications**, and then click **Add new**.  
The Create application page displays.
2. Complete the following fields:
  - **ID** – A unique number to identify the Application. Companies can define their own identification system which could assist in identification of applications within different departments, for example, Finance, Sales, and so on, or just a unique identification across the organization's applications generally.
  - **Name** – The application name.
  - **Description** – An optional description of the application.
  - **Version** – The version number of the application.

- **Owner** –The person in your organization responsible for the version deployed and in operation. This could be the Finance Director for applications that are specific to the Finance team and not just an individual who oversees IT.
- **Availability** – The availability of the application. You could set the application to be constantly available or limit its availability to a specific day and/or time. For example, only between 09:00 to 17:30 on business days. This can be used to ensure that backups and maintenance periods are included in the definition of the application.
- **Connectivity Method** – The method of access for the application. Options include:
  - Web Access (Internet Explorer)
  - Web Access (Chrome)
  - Desktop Application
  - Citrix (Application)
  - Citrix (Desktop Application)
  - Remote Application
  - Remote Desktop Application
  - Other
- **Timeouts** – The period of time after which the application will timeout and exit if unused.

3. Click **Create application** to store the information in the Hub database.

A notification displays to confirm a the application has been successfully created. The application is added to the list in the Application overview page.

## Edit an application

1. On the Applications overview page, select the check box for the required application.
2. Click **Edit**.
3. Edit the information as required.
4. Click **Save**.

## Retire and reinstate an application

1. On the Applications overview page, select the check box for the required application.

If the application is:

- Live, the Status icon changes to Retire.
- Retired, the Status icon changes to Make Live.

The screenshot shows the 'Overview' tab of the Applications page. At the top, there are navigation icons for 'Overview' and 'Access and permissions'. Below that are icons for 'Edit view', 'Filter', 'Save view', and 'Load view'. On the right side, there are buttons for 'Add new', 'Edit', and 'Retire'. Below these is a 'Rows per page' dropdown set to '5' and pagination controls showing 'Page 1 of 1 (1 total rows)' with 'Previous' and 'Next' arrows. The main table has the following columns: ID, Name, Description, Version, Owner, Availability, Connectivity method, Timeouts, Active, and Selected. The first row contains the application 'BPCAPP001' with status 'Live' and a checked 'Selected' checkbox.

ID	Name	Description	Version	Owner	Availability	Connectivity method	Timeouts	Active	Selected
BPCAPP001	Orders	Order Application used to capture order fro...	1.0	admin	24 x 7	Desktop application	12:00:00	Live	<input checked="" type="checkbox"/>

2. To retire an application:
  - a. Click **Retire**.  
A message displays asking you to confirm.
  - b. Click **Yes**.  
The application is retired and the Retire icon changes to Make Live.
3. To make a retired application live, click **Make Live**.  
The application is instantly reinstated and the Make Live icon changes to Retire.

 You can use the **Active** filter to filter the list for retired applications.

## Set permissions on an application

 For the on-premise version of the product, the Access and Permissions capability is non-operational. This functionality will be re-introduced in a later version.

## Use the filters on the Applications overview page

The filters enable you to easily find a specific application based on the selected criteria.

1. On the Applications overview page, click **Filter** to open the Filter panel.
2. Use the toggle to turn on the required filter and complete the information to find the application. You can apply multiple filters at the same time.

The available filters are:

Filter	Description
<b>ID</b>	Enter the full or partial identifier for the application.
<b>Name</b>	Enter the full or partial name of the application.
<b>Description</b>	Enter a term or word to search against the text in the application description.
<b>Version</b>	Enter the version number of the application. The will also filter against partial matches, for example, if you enter 1, the filter will also display applications which have versions such as 1.0 and 10.
<b>Owner</b>	Enter the user's username, or part of their username.
<b>Availability</b>	Enter the full or partial text to match against the availability of the application.
<b>Connectivity</b>	Select the connectivity from the drop-down list. The available options are the same as those available when adding the application. For more information, see <a href="#">Add an application on page 11</a> .
<b>Timeouts</b>	Enter a time range. The time must be in the format hh:mm:ss.
<b>Active</b>	Select the status of the application from the following options: <ul style="list-style-type: none"> <li>• <b>Live</b> – Displays the active applications; these are applications that have not been retired.</li> <li>• <b>Retired</b> – Displays the applications that have been retired by an administrator.</li> </ul>

The information on the Applications overview page is immediately filtered.



If you have set the filters but want to view the unfiltered information again, either turn off the required filters, or remove any settings within the filter so that it is blank.

3. Click **Close drawer** to close the filter panel.

## Process definitions

The **Process definitions** option under ALM allows the creation of electronic versions of the Process Definition Document (PDD) and their attributes.

A process definition is a document, whether a physical document or an electronic version, that describes in detail a business process. A Process Definition Document (PDD) should consist of the following:

- A summary of what the overall process and solution is.
- Definitions of unique language used within the business process.
- Scope and expectations as to what the automation should achieve.
- Volumes, how many instances of this task are going to be ran each day.
- Interact design to dictate what the solution would visually look like.
- A list of applications that your automation will interact with as well as their versions.
- A high-level process map of what the goal is.
- Low level steps, keystroke level details of the process.
- Inputs, triggers and outputs relevant to the automation.
- Exceptions, what varying scenarios should you expect and handle.

The process definition is the core tool for the automation developer role, its accuracy and consistency will mean the difference between an average and great automation so ensure the information is complete before starting your work. The build of an automation shouldn't commence without a process definition and so Blue Prism emphasizes the importance of this document.

On the Process definitions page in ALM, the following attributes for a process definition display:

- **Process name** – Name of the process definition. This is inherited from the business process.
- **Version** – The version number of the process definition. See [Versioning on the next page](#) for more information.
- **Update note** – The note saved on a process definition when the latest update to the major/minor version was saved.
- **Updated by** – The last user to update the process definition.
- **Update date** – The latest date that the process definition was updated.
- **Sections** – Different sections that make up the process definition.
- **Locked by** – The user who currently has the process definition “open”, if appropriate.
- **My access** – The access the current user has on the process definition.

By default, the Process definitions page displays the latest version of each process definition. If you want to view all versions, open the **Filters** and turn off the **Latest** filter.

## Versioning

Versioning is the method used to manage the creation and management of multiple releases of process definitions. As they are developed, improved, upgraded or customized users can save versions to capture versions at particular points in time.

There are two versions levels, minor and major versions. A minor version of the process definition is captured every time you save the document. Only an owner or contributor can update to the major version. This would be used typically when a milestone has been reached and the process definition is being sent for review. More details on versioning are included in [Process definition sign-off on page 30](#).

The screenshot shows a list of process definitions. The first entry is 'Adding product' with version 0.0, last updated by 'admin' on 26/01/2021 at 01:29 PM. It has 0 Sections, 0 Steps, and 0 Steps/Section. The second entry is 'Adding orders' with version 0.2, last updated by 'admin' on 26/01/2021 at 01:10 PM. It has 4 Sections, 9 Steps, and 2 Steps/Section. The interface includes a sidebar with 'Production', 'Templates', and 'Signed off' categories, a 'Filter' button, a 'Create definition' button, and a 'Rows per page' dropdown set to 5. The page number is 'Page 1 of 1 (5 total rows)'.

By default, the **Latest** filter is turned on and only the latest versions of each process definitions 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.

## Add a process definition

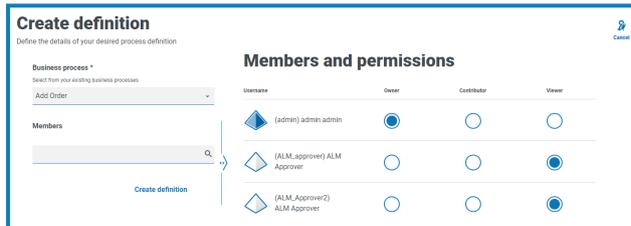
You must have a business process defined before you can create a process definition. For more information, see [Business processes on page 6](#).

1. On the Automation lifecycle page, click **Process definitions**, and then click **Create definition**.

The Create definition page displays.

2. Select the appropriate process from the **Business process** drop-down list.

The Members and permissions section displays all the users assigned to the selected business process.



You can use the **Members** search field to find a specific user. The list of users filters as you type.

3. Set the permissions at the required level. By default, the creator will be the owner and all others will be members. You can change any permission, but you must have at least one owner assigned:

Access Level	Description
<b>Owner</b>	<p>With this level of access the user can read, write, delete and initiate sign-off of the process definition. The user who created the process definition will automatically be given owner rights. In detail, they can perform the following:</p> <ul style="list-style-type: none"> <li>• <b>Edit Definition</b> – Allows the user to edit the process definition, if it's not locked by another user.</li> <li>• <b>Increase Major</b> – Allows the user to increase the major version of the process definition.</li> <li>• <b>View</b> – Allows the user to view the process definition, they will not be able to edit the process definition in this mode.</li> <li>• <b>Edit Access Control</b> – The user can alter the access privileges of different members. Members are alerted to their access change via a notification.</li> <li>• <b>Sign off Options</b> – This gives the user three options: <ul style="list-style-type: none"> <li>• <b>Submit for sign off</b> – Sends a notification to members letting them know that they need to sign off on the PDD.</li> <li>• <b>Redact Sign-off</b> – Owner can redact the sign-off.</li> <li>• <b>Member Sign off</b> – View the different members who have and have not signed off.</li> </ul> </li> <li>• <b>View Update Note</b> – Allows the user to see the latest update note, date it was updated and the user who updated.</li> <li>• <b>Delete</b> – Reverts the process definition to the previous version. You cannot delete the initial version of a PDD.</li> </ul>

Access Level	Description
<b>Contributor</b>	<p>With this level of access the user can read, write, and delete the PDD. In detail, they can:</p> <ul style="list-style-type: none"> <li>• <b>Edit Definition</b> – Allows the user to edit the process definition, if it's not locked by another user.</li> <li>• <b>Increase Major</b> – Allows the user to increase the major version of the process definition.</li> <li>• <b>View</b> – Allows the user to view the process definition, they will not be able to edit the process definition in this mode.</li> <li>• <b>View Update Note</b> – Allows the user to see the latest update note, date it was updated and the user who updated.</li> </ul>
<b>Viewer</b>	<p>With this level of access the user can read the PDD. In detail, they can:</p> <ul style="list-style-type: none"> <li>• <b>View</b> – Allows the user to view the process definition, they will not be able to edit the process definition in this mode.</li> <li>• <b>View Update Note</b> – Allows the user to see the latest update note, date it was updated and the user who updated.</li> </ul>

#### 4. Click **Create definition**.

A notification displays confirming the definition has been saved and the Edit definition page displays. You are now ready to add sections.

## Sections

A section is a group of steps that describe a combined part of the process, for example, the 'Login steps' into an application. Using this structured approach enables the users to create 'reuseable' sections which can be stored as templates and reused in other process definitions. See [Templates on page 39](#) for more information.

### Add sections to a PDD

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

 You can not edit a process definition which has been sent for sign off. When you click **Options**, you will see that the **Edit definition** option is inactive. For more information, see [Process definition sign-off on page 30](#).

#### 1. On the Process definitions page, click **Options** next to the required process and click **Edit definition**.

The Edit definition page displays.

2. Click **Add Section**.

The Create section panel displays.

3. Enter a name and an optional description of the section being created. Alternatively, you can click **Template** and select a template for the section.

4. Click **Save**.

The section is added to the process definition.

As more sections are added, the order can be amended by dragging the section to the required place. The icons next to the section enable you to edit the section, export to a template, or delete it from the process definition.

5. Repeat this process to add further sections.

You are now ready to add steps to your sections, see [Steps below](#).

6. Click **Save** on the Edit definition page to commit the sections to the PDD.

## Steps

Steps are the tasks that the human worker would undertake to perform the business process. They are the actions, for example, input username, input password, click login button, and then a decision to check that the credentials were correct. There are four types of steps you can use, these are:

- **Action** – This allows you to define an action for your application. These include: Input, Read, Select, Launch, Close, Drag and Drop, Click, Double Click, Right Click and Terminate.
- **Decision** – This allows you to insert true/false or multiple conditions.
- **Email** – This allows you to include an email step within your process.
- **Object** – This allows you to add Blue Prism Object to your process definition.

## Action

Actions are used to configure the steps a user would perform in a screen such as input data into a field, click a button, close an application.

An action step is configured using the following fields:

- **Application** – Select the required action from the drop-down. Each currently defined application is available.
- **Screen name** – The name of the screen in the application on which the action will occur. As you start to type the screen name, a list of possible names will appear that have been created earlier. If reusing an existing screen name, you can select it from the list. If it is a new name, type the name and then move to the next field to create the new screen name.
- **Action** – The type of action the step will perform:
  - **Input** – Inputs data into a field.
  - **Read** – Reads data from a form or field.
  - **Select** – Selects an option, for example, a drop-down menu item.
  - **Launch** – Launches an application.
  - **Close** – Closes an application.
  - **Drag and drop** – Allows a data item to be moved between two applications.
  - **Click** – Presses a button or file menu item.
  - **Double click** – Double click a button or item on the screen.
  - **Right click** – Right click on a button or item on the screen.
  - **Terminate** – Terminates the application following an exception.
- **Element name** – Enter a name for the element that will enable the automation developer to recognize the field that the automation will interact with, for example, username, password, or login button.

- **Route to** – Determines what happens when the step is complete:
  - **Next step** – Moves to the next step in the process.
  - **TBC** – A placeholder that is useful if the required step has not yet been configured.
  - **End** – The end of the process. Each process must finish with a step that routes to End.
- **Image** – Take a snapshot of the application showing the fields and the buttons. The automation developer can then review this during the build to ensure that they are on the correct screen within the application. This also ensures they can recognize fields and buttons correctly.
- **Description/summary** – An optional description of the step.

To quickly add the next step in the process, select **Create another** before saving. When you click **Save**, the dialog will refresh allowing you to quickly configure the action.

## Decision

A decision determines what option should be taken if more than one outcome is available. The process can continue to the next step or another defined step. In the example below, a decision has been added after the login button has been pressed. The decision checks whether the incorrect username or password dialog displays. If neither appears, then a decision needs to be made as to the next step undertaken.

The screenshot shows a configuration dialog for a decision step. It is divided into three main sections: 1. 'What kind of decision are you making?' with radio buttons for 'True/false' (selected) and 'Custom choice'. 2. 'On true' with radio buttons for 'Route to' (selected) and 'Exception', and a dropdown menu for 'Route to \*' set to 'TBC'. 3. 'On false' with radio buttons for 'Route to' (selected) and 'Exception', and a dropdown menu for 'Route to \*' set to '2.1 Click New Order'. There is also an 'Image' upload section with a 'Drop or paste the image' prompt, 'Max file size: 5MB', and an 'Upload' button. A 'Description/summary' text area contains the text: 'Either an incorrect username or password has been entered into the Login Screen of the Order Application'. A 'Decision name \*' field contains 'Incorrect Username or Password'. A 'Create step' button is at the bottom.

A decision step is configured using the following fields:

- **Type of decision** – The options that are available for the decision. This could be true/false or a custom choice.
- **List of choice** – The options available. Once selected, configure what will happen when the outcome of the choice occurs, such as progress to a specified stage.

## Email

If a business process includes sending an email, configure the contents and recipients in an email step.

**Create email step 1.5** Reset form Close drawer

**To \***  
Separate with (,) semi-colon.

**Cc**  
Separate with (,) semi-colon.

**Bcc**  
Separate with (,) semi-colon.

**Subject \***

**Body \***  
500 Characters remaining

**Description**  
B / I / U / A  
500 Characters remaining

**Route to \***  
Next step

Create another

Save

## Object

Incorporate Blue Prism business objects in process capture.

### Create object step 1.6

**Environment \***

Environment \*

**Utility \***

Utility \*

**Action \***

Action \*

Next step

Max file size: 5MB

Upload

**Notes**

B / U  A

500 Characters remaining

Create another

Create step

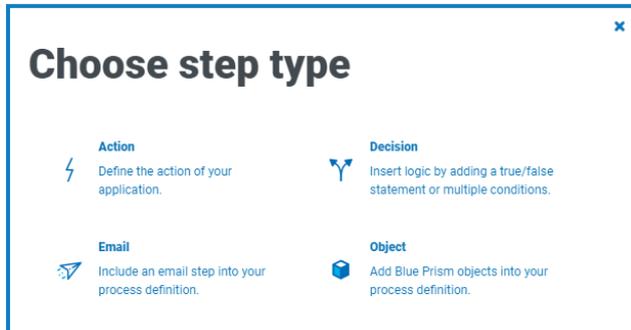
An object step is configured using the following fields:

- **Environment** – The Blue Prism environment in which the business object/utility file is located in.
- **Utility** – The name of the business object/utility file that the automation developer will use to call the required action.
- **Action** – The required action that the developer will use from the business object/utility file.
- **Route to** – Determines what happens when the step is complete.

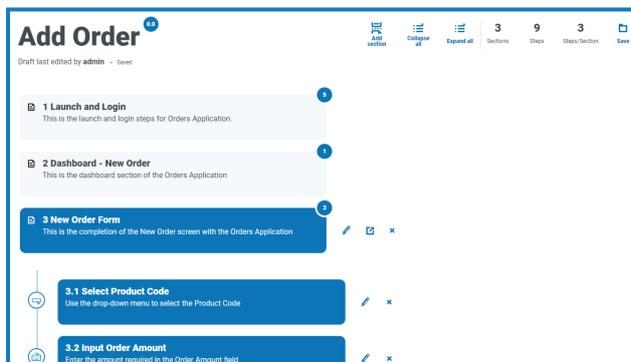
## Add steps to a PDD

1. On the Edit definition page of a process, click the **Create step** icon **+** below the appropriate section.

The Choose step type dialog displays.



2. Select the required step type:
  - Action
  - Decision
  - Email
  - Object
3. Configure the step.
4. Add and define all the required steps until you have built up the complete process.



 The final step in a business process must be the steps required to exit the application and the final step needs to include a route to End.

5. Click **Save** to create a minor version of the process definition. See [Versioning](#) for further information.

The Increase minor panel displays.

6. Enter a description to remind you where you are up with the process and click **Save**.

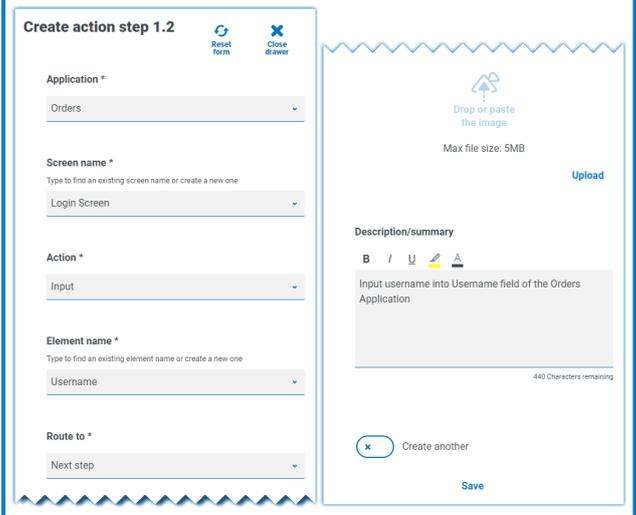
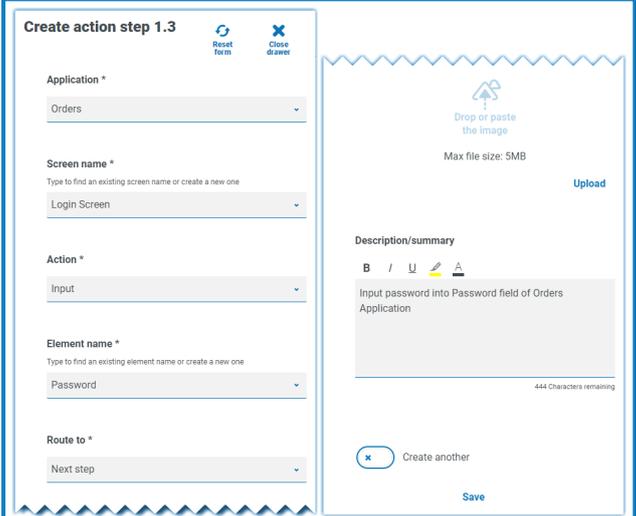
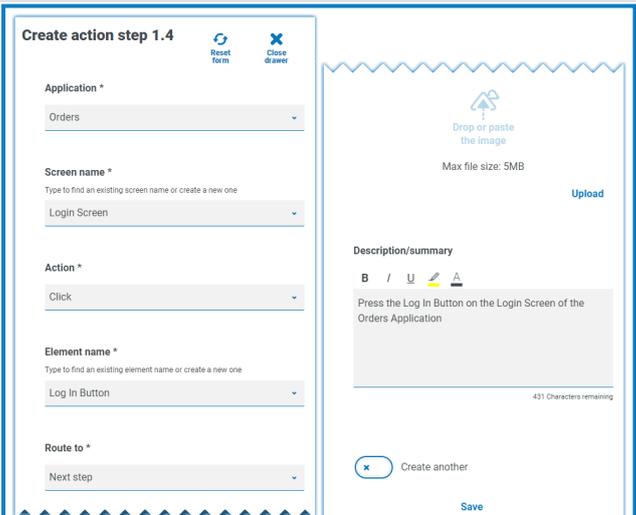


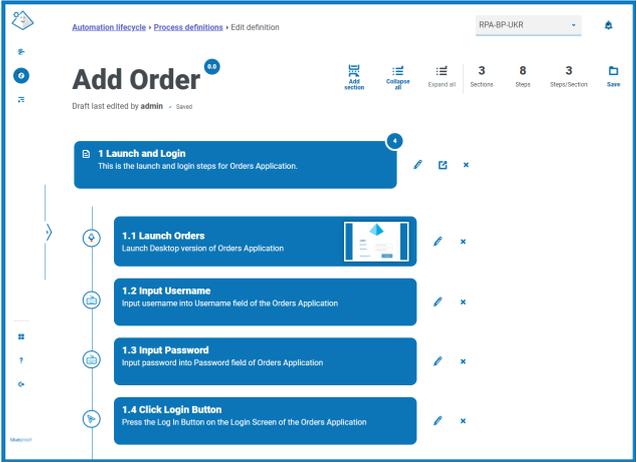
The Process Definition screen displays, updated to show the latest version of the process definition.

### Example: Add a login section

This example demonstrates how to create the steps for a simple application login.

Step	Example screen	Details
<p><b>1</b></p>		<p><b>Launch the application</b></p> <p>Open the selected application on the login screen and proceed to the next step:</p> <ul style="list-style-type: none"> <li>• <b>Action</b> – Launch</li> <li>• <b>Application</b> – As required</li> <li>• <b>Route to</b> – Next step</li> </ul>

Step	Example screen	Details
<p>2</p>		<p><b>Enter a username</b></p> <p>Enter a username in the Username field on the Login screen and proceed to the next step:</p> <ul style="list-style-type: none"> <li>• <b>Action</b> – Input</li> <li>• <b>Application</b> – As required</li> <li>• <b>Screen name</b> – Login screen</li> <li>• <b>Element name</b> – Username</li> <li>• <b>Route to</b> – Next step</li> </ul>
<p>3</p>		<p><b>Enter a password</b></p> <p>Enter a password in the Password field on the Login screen and proceed to the next step:</p> <ul style="list-style-type: none"> <li>• <b>Action</b> – Input</li> <li>• <b>Application</b> – As required</li> <li>• <b>Screen name</b> – Login screen</li> <li>• <b>Element name</b> – Password</li> <li>• <b>Route to</b> – Next step</li> </ul>
<p>4</p>		<p><b>Click the log in button</b></p> <p>Click the Log in button and proceed to the next step:</p> <ul style="list-style-type: none"> <li>• <b>Action</b> – Click</li> <li>• <b>Application</b> – As required</li> <li>• <b>Screen name</b> – Login screen</li> <li>• <b>Element name</b> – Log in button</li> <li>• <b>Route to</b> – Next step</li> </ul>

Step	Example screen	Details
5		<p><b>Process complete</b></p> <p>All the required actions have been completed and are listed on the Edit definition page.</p>

## Add an exception to a PDD

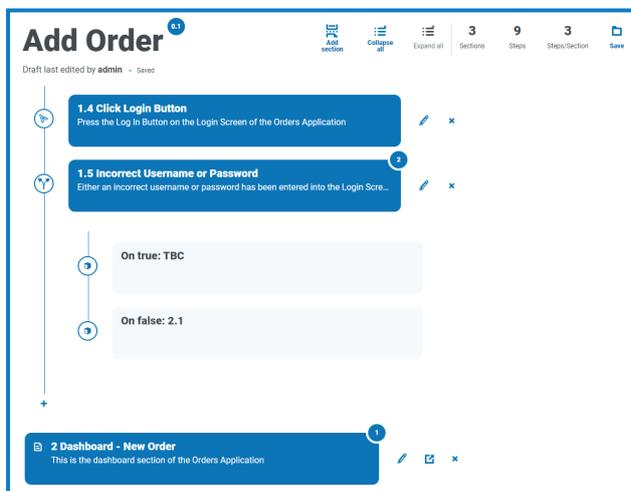
Exceptions can be added to a process to cater for unexpected occurrences when running a process. You will need to have created at least one exception before following the process below.

For information about creating exceptions, see [Exceptions on page 36](#).

1. On the Process definitions page, click **Options** next to the required process and click **Edit definition**.

The Edit definition page displays.

2. Locate the step that requires an exception.



3. Click the edit icon  next to the step.

The Edit page displays for the step type, for example, the Edit decision page.

4. Select the required exception for this choice. You can:

- **Use an existing exception** – Select an exception from the drop-down list.

In the example below, the Incorrect Credentials Supplied exception is being added to the Incorrect Username or Password step.

The screenshot shows a configuration window for a decision step. It is divided into three main sections: 'What kind of decision are you making?', 'On true', and 'On false'.  
1. **What kind of decision are you making?**: Includes radio buttons for 'True/false' (selected) and 'Custom choice'. There is an 'Upload' button and a text input for 'Decision name \*' containing 'Incorrect Username or Password'.  
2. **On true**: This section is highlighted with a red box. It contains 'Choose an option' with radio buttons for 'Route to' and 'Exception' (selected). Below it is an 'Exception \*' dropdown menu showing 'E002: Incorrect Credentials Supplied'.  
3. **On false**: Contains 'Choose an option' with radio buttons for 'Route to' (selected) and 'Exception'. Below it is a 'Route to \*' dropdown menu showing '2.1 Click New Order'.  
Additional elements include a 'Description/summary' text area with a character count of 394 and a 'Save' button at the bottom.

- **Enter a new exception** – If the required exception has not yet been created, you can create the skeleton of an exception by selecting **Add new exception** and entering a new name.

For further information, see [Exception pending](#) below.

5. Click **Save**.

## Exception pending

If you have selected **Add new exception** for a step choice, when you save the step, a flag is added to the step in the PDD to show that it references an exception that has not yet been populated.

Click the **Click here** link in the flagged step and configure the exception as described in [Exceptions on page 36](#).

## Process definition sign-off

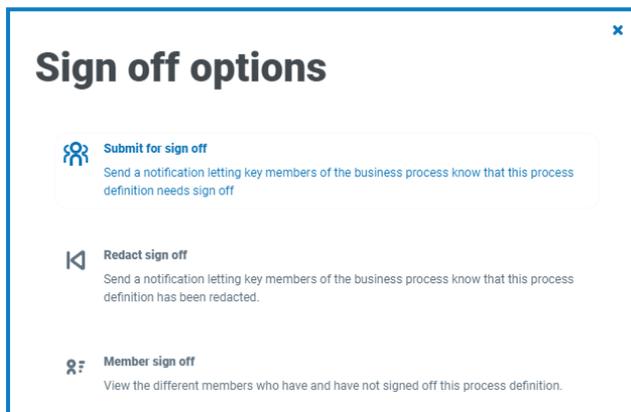
In the Automation Lifecycle plugin, the users with the Process Definition Owner role can initiate the sign-off procedure. This workflow usually occurs when all the sections and steps in a business process have all been captured.

### Submit for sign off

Once a process definition has been fully configured, you can send it to be signed off by the appropriate people in your organization. Each person must have a valid login so they can be selected to sign off the PDD.

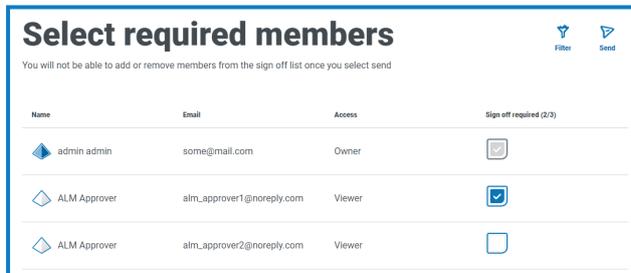
1. On the Process definitions page, click **Options** next to the required process and click **Sign off options**.

The Sign off options dialog displays.



2. Click **Submit for sign off**.

The Select required members page displays.



3. Select the members who are responsible for signing off the PDD. You will not be able to change the signatories once you have sent the PDD for approval, unless you [redact the sign off](#) process.
4. Click **Send**.

The selected users are sent a [notification](#) telling them that the PDD needs to be signed off.

### Sign off a PDD

When a business process owner initiates the sign-off procedure, the required members receive an in-product notification letting them know that sign off is required.

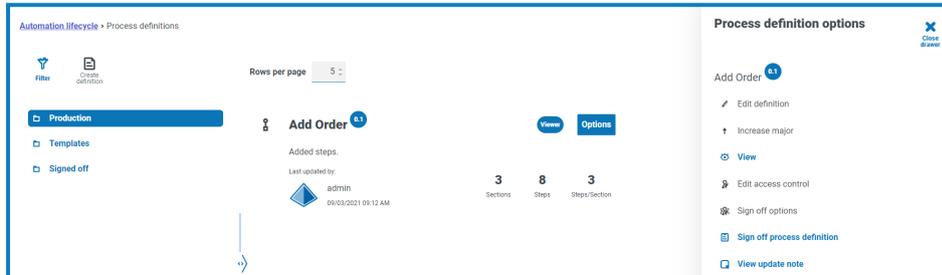
Once signed off, you have the option to redact the definition until the sign off process is complete. Once every member has approved and signed it off, you will no longer have this option. Only the owner of the process definition will be able to redact the sign off at that point.

To sign off the process definition:

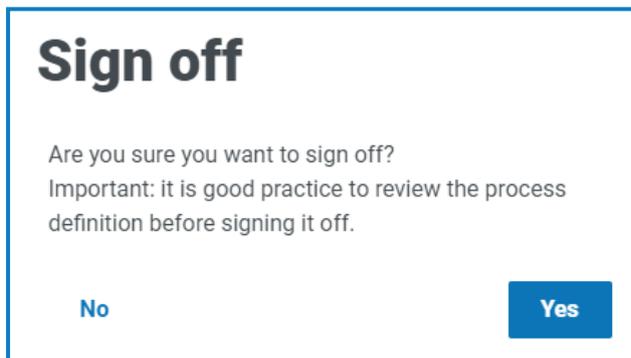
1. On the Automation lifecycle page, click **Process definitions** to view all the definitions.

 To limit the list of process definitions to those that require sign off, click **Filters** and set the **Signed off** filter to **Required**.

2. Click **Options** next to the required process and click **Sign off process definition**.



The Sign off dialog displays asking you to confirm that you have reviewed the process definition in accordance with best practice, and that you want to sign it off.



3. Click **Yes**.

The process definition is signed off and a notification message displays. A notification is also sent to the business process owners.

## Redact sign off

When a process definition has been sent out for review, it is locked for editing. Only an owner can redact this process. However, a reviewer can redact their own review, providing this is done prior to all other reviewers completing their review. Once all reviewers have either approved or rejected the sign-off process the only individual who can remove the lock, whether through redaction or acceptance is the owner of the process definition.

To redact your review:

 To limit the list of process definitions to those that you have sign off, click **Filters** and set the **Signed off** filter to **Approved**.

1. On the Process definitions page, click **Options** next to the required process and click **Redact sign off**.

The Redacting process definition dialog displays asking you to confirm your redaction.

2. Click **Yes**.

Your sign off is redacted and a notification message displays.

To redact the review process – this has to be performed by the process definition owner:

1. On the Process definitions page, click **Options** next to the required process and click **Sign off options**.

The Sign off options dialog displays.

2. Click **Redact sign off**.

The Redact definition dialog displays asking you to confirm the redaction.

3. Click **Yes**.

The sign off is redacted and a notification message displays.

## Member sign off

This option lets you to keep track of the sign-off and check the status of the sign-off for each member. The page shows the members name, email address, sign-off status and sign-off date time. There are three possible sign off states:

- **Awaiting Sign-off** – Member has not signed-off yet.
- **Redacted Sign-off** – Member had signed-off, however has chosen to redact the initial sign-off.
- **Signed-off** – Member has signed-off.

Member sign off status					 Filter
Here you can check the sign off status of the members assigned to this definition					
Name	Email	Access	Sign off status	Sign off date/time	
 admin admin	some@mail.com	Owner	✓ Signed off	26/01/2021 13:36:18	
 ALM Approver	alm_approver1@noreply.com	Contributor	✗ Redacted sign off	26/01/2021 13:38:25	
 ALM Approver	alm_approver2@noreply.com	Viewer	✓ Signed off	26/01/2021 13:39:07	

The process definition will not appear in the Signed off folder on the Process definitions page until all members have signed off the process. If any members redact their sign off, the process definition will appear in the Production folder.

To view the member sign off:

1. On the Process definitions page, click **Options** next to the required process and click **Sign off options**.

The Sign off options dialog displays.

2. Click **Member sign off**.

The Member sign off status page displays.

## Other features

A number of other features are available when you are viewing and editing processes definitions, as described below:

- Expand or collapse individual sections by clicking on them.
- The **Collapse all** and **Expand all** icons expand or collapse all sections.
- The context sensitive icon to the right of the section or step allows you to view the name and full description for that item.

In addition to the features listed above, the following features are available when you are editing processes definitions:

- Grabbing the step or section allows you to drag and drop the item elsewhere to update the order.
- The context sensitive icons to the right of the section or step allow you to edit, export to template (sections only) or delete the steps or sections. If you delete a section, it will remove any steps within it.
- If you leave the business definition without saving it, any changes you have made are stored as draft. They will be available the next time you return to edit the definition.

## Use the filters on the Process definitions page

The filters enable you to easily find a specific process definition based on the selected criteria.

1. On the Process definitions page, click **Filter** to open the Filter panel.
2. Use the toggle to turn on the required filter and complete the information to find the required process definition. You can apply multiple filters at the same time.

The available filters are:

Filter	Description
<b>Process name</b>	Enter the name of the process definition, or part of the name.
<b>Version</b>	Enter the version number of the process definition. The will also filter against partial matches, for example, if you enter 1, the filter will also display definitions which have versions such as 1.0 and 10.
<b>Sections</b>	Enter the name of the section that appears in the process definition, or part of the name.
<b>Contributors</b>	Enter the user's username, or part of their username.
<b>Owners</b>	Enter the user's username, or part of their username.
<b>Locked by</b>	Enter the user's username, or part of their username.

Filter	Description
<b>Latest</b>	<p>Select whether you want to only see the latest version of the process definition or earlier versions; the options are:</p> <ul style="list-style-type: none"> <li>• <b>Yes</b> – Displays only the latest version of the process definition. This is the default setting.</li> <li>• <b>No</b> – Displays only the earlier versions of the process definition and not the latest version.</li> </ul> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p> By default, the <b>Latest</b> filter is already turned on. You can turn this off if you want to view all versions of the process definitions.</p> </div>
<b>Updated by</b>	Enter the user's username, or part of their username.
<b>Updated date</b>	<p>Enter a date range. In the:</p> <ul style="list-style-type: none"> <li>• First field, select the earliest date.</li> <li>• Second field, select the latest date.</li> <li>• If required, adjust the time fields. By default, the earlier date has the time 00:00:00 and the later date has the time 23:59:59, thereby including the full day.</li> </ul> <p>This displays any exceptions updated during this time frame.</p>
<b>Process active</b>	<p>Select the active status of the process definition from the following options:</p> <ul style="list-style-type: none"> <li>• <b>Yes</b> – Displays the active process definitions; those that have not had the associated <a href="#">business processes</a> retired.</li> <li>• <b>No</b> – Displays the process definitions that are no longer active; those where the associated <a href="#">business processes</a> have been retired by an administrator.</li> </ul>
<b>Signed off</b>	<p>Select the signed off setting from the following options:</p> <ul style="list-style-type: none"> <li>• <b>None</b> – Displays the process definitions that have not yet been submitted for sign off.</li> <li>• <b>Required</b> – Displays the process definitions that have been submitted for sign off but not yet approved by the reviewers.</li> <li>• <b>Approved</b> – Displays the process definitions that have been submitted for sign off and approved.</li> </ul>
<b>My access</b>	<p>Select your access level from the drop-down list. The options are:</p> <ul style="list-style-type: none"> <li>• <b>Owner</b> – Displays the process definitions for which you are an owner.</li> <li>• <b>Contributor</b> – Displays the process definitions for which you are a contributor.</li> <li>• <b>Viewer</b> – Displays the process definitions for which you are a viewer.</li> </ul> <p>For more information on access levels, see <a href="#">Add a process definition on page 17</a>.</p>

The information on the Process definitions page is immediately filtered.



If you have set the filters but want to view the unfiltered information again, either turn off the required filters, or remove any settings within the filter so that it is blank.

3. Click **Close drawer** to close the filter panel.

## Exceptions

The **Exceptions** option under ALM allows the creation of exceptions and their attributes.

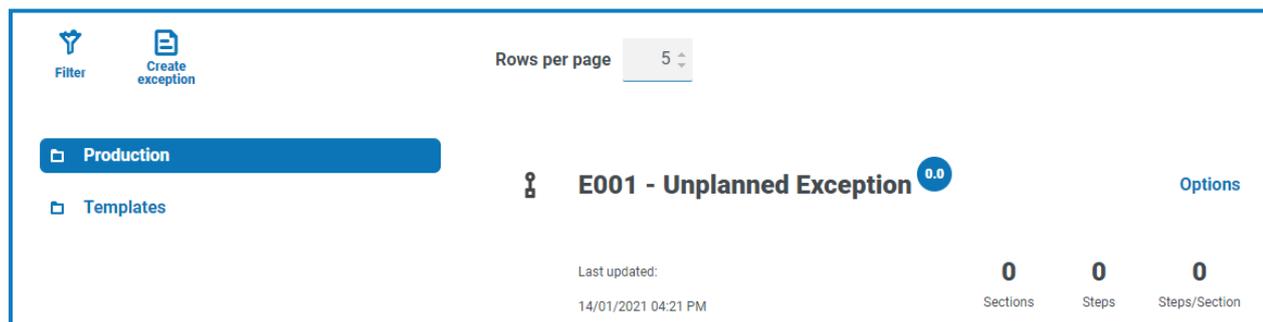
### Create an exception

1. On the Exceptions page, click **Create exception**.  
The Create exception page displays. The exception code is automatically assigned and populated by the system
2. Enter a description for the exception in the **Name** field.
3. Click **Create exception**.  
A notification displays confirming the exception has been created.
4. Click **Add section** to add the necessary sections and steps that must be performed if the exception occurs.  
The Create section panel slides out from the side.
5. Enter the required information and click **Save** at the bottom of the Create section panel.  
The section displays in the exception.
6. Click **Save** to save the changes to the exception.  
The Increase minor panel slides out from the side.
7. Enter a note regarding the changes to the exception and click **Save**.  
The changes are saved and the exception version number is incremented.

The exception can now be used in the steps in a process definition document as described in [Add an exception to a PDD on page 27](#).

### Default exception

The first exception is automatically created and is the default “Unplanned Exception” and is used as a catch all when something unexpected happens.



As this is the catch all exception, it must be modified each time a new application is added to support the termination process. Subsequent exceptions should be specific to the business process and the error that has occurred.

In this example, the following is created to handle the incorrect credentials being added.

## Create exception

Define the details of your desired exception

**Exception code \***

**Name \***

70 Characters remaining

Create exception

## Create section 1

Close drawer

New

Template

---

**Name \***

**Description**

B / U **A**

Incorrect Username or Password has been supplied for the Orders Application.

424 Characters remaining

x

Create another

Save

## Use the filters on the Exceptions page

The filters enable you to easily find a specific exceptions based on the selected criteria.

1. On the Exceptions page, click **Filter** to open the Filter panel.
2. Use the toggle to turn on the required filter and complete the information to find the required exception. You can apply multiple filters at the same time.

The available filters are:

Filter	Description
<b>Exception code</b>	Enter the full or partial code for the exception.
<b>Exception name</b>	Enter the name of the exception, or part of the name.

Filter	Description
<b>Version</b>	Enter the version number of the exception. The will also filter against partial matches, for example, if you enter 1, the filter will also display exceptions which have versions such as 1.0 and 10.
<b>Processes</b>	Enter the full or partial name of the process definition that the exception is associated with.
<b>Latest</b>	<p>Select whether you want to see the latest version of the exception or earlier versions; the options are:</p> <ul style="list-style-type: none"> <li>• <b>Yes</b> – Displays only the latest version of the exception. This is the default setting.</li> <li>• <b>No</b> – Displays only the earlier versions of the exception and not the latest version.</li> </ul> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p> By default, the <b>Latest</b> filter is already turned on. You can turn this off if you want to view all versions of the exceptions.</p> </div>
<b>Sections</b>	Enter the name of the section that appears in the exception, or part of the name.
<b>Locked by</b>	Enter the user's username, or part of their username.
<b>Updated up</b>	Enter the user's username, or part of their username.
<b>Updated date</b>	<p>Enter a date range. In the:</p> <ul style="list-style-type: none"> <li>• First field, select the earliest date.</li> <li>• Second field, select the latest date.</li> <li>• If required, adjust the time fields. By default, the earlier date has the time 00:00:00 and the later date has the time 23:59:59, thereby including the full day.</li> </ul> <p>This displays any exceptions updated during this time frame.</p>

The information on the Exceptions page is immediately filtered.

 If you have set the filters but want to view the unfiltered information again, either turn off the required filters, or remove any settings within the filter so that it is blank.

3. Click **Close drawer** to close the filter panel.

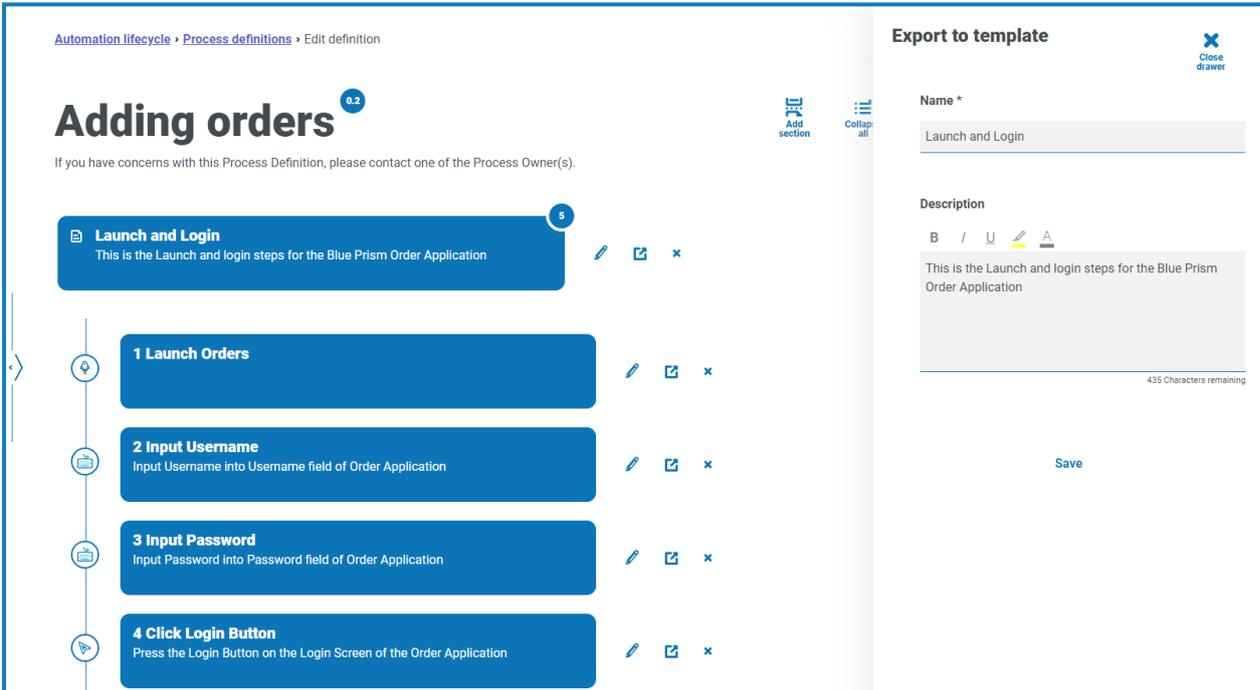
## Templates

Templates exist in both the process definitions and exceptions options of the Automation Lifecycle plugin. Templates allow you to re-use sections of a process definition or exception as a repeatable block. For example, a login section may be used in multiple processes and using a template means you will not have to recreate the login section for each.

### Export a section as a template

1. On the Edit definition page, select the export to template icon  .

The Export to template panel slides out, showing the name and description of the section you have chosen.



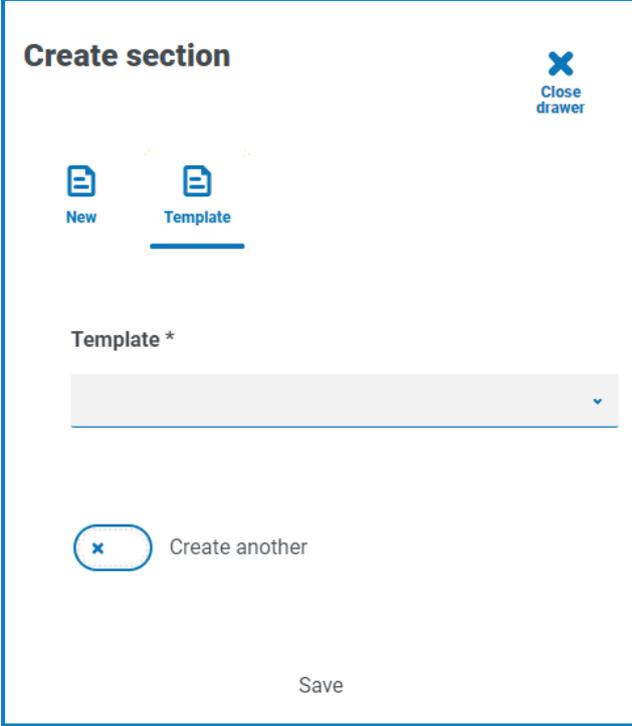
The screenshot shows the 'Adding orders' process definition page. The main area displays a flowchart with four steps: 'Launch and Login', '1 Launch Orders', '2 Input Username', '3 Input Password', and '4 Click Login Button'. The 'Launch and Login' step is selected, and the 'Export to template' panel is open on the right. The panel contains a 'Name' field with the value 'Launch and Login' and a 'Description' field with the value 'This is the Launch and login steps for the Blue Prism Order Application'. A 'Save' button is visible at the bottom of the panel. The 'Close drawer' button is in the top right corner of the panel.

2. Update the name and description if required.
3. Click **Save**.

The section is saved as template.

## Use a template in a process definition

1. Create a definition in the normal way (see [creating a business process](#) and a [new process definition](#)).
2. When you create a section, select **Template** rather than creating a new section from scratch.



The screenshot shows a 'Create section' dialog box. At the top left is the title 'Create section' and at the top right is a 'Close drawer' button. Below the title are two options: 'New' and 'Template', each with a document icon. The 'Template' option is selected and underlined. Below these options is a 'Template \*' label followed by a dropdown menu. At the bottom of the dialog, there is a 'Create another' button with a close icon and a 'Save' button.

3. Select the required template from the drop-down list.
4. Click **Save** to create the section of the process from the saved template.

 Templates can also be used in [Exceptions](#) in the same way.

## Triggered notifications

There are several in-built triggers that notify users about specific events throughout the automation life cycle. To view these notifications, select the bell icon located in the top-right corner of your screen. If you have no notifications, the notification tray will be empty. This icon is also used to review any future system announcements.

The table below describes each notification type.

Notification	Trigger	Recipients
PDD sign off	The Business Process Owner initiates a PDD sign off.	Members who need to sign off the PDD.
PDD signed off	All required members have signed off a PDD.	Business process owners.
PDD sign off redacted	A required business process member has redacted a PDD that they have previously signed off.	Business process owners.
PDD sign off by Business Process Owner	A business process owner redacts the sign-off process.	Members who need to sign off the PDD.
All required members have signed-off	All required business process members have signed a PDD off.	Business process owners.