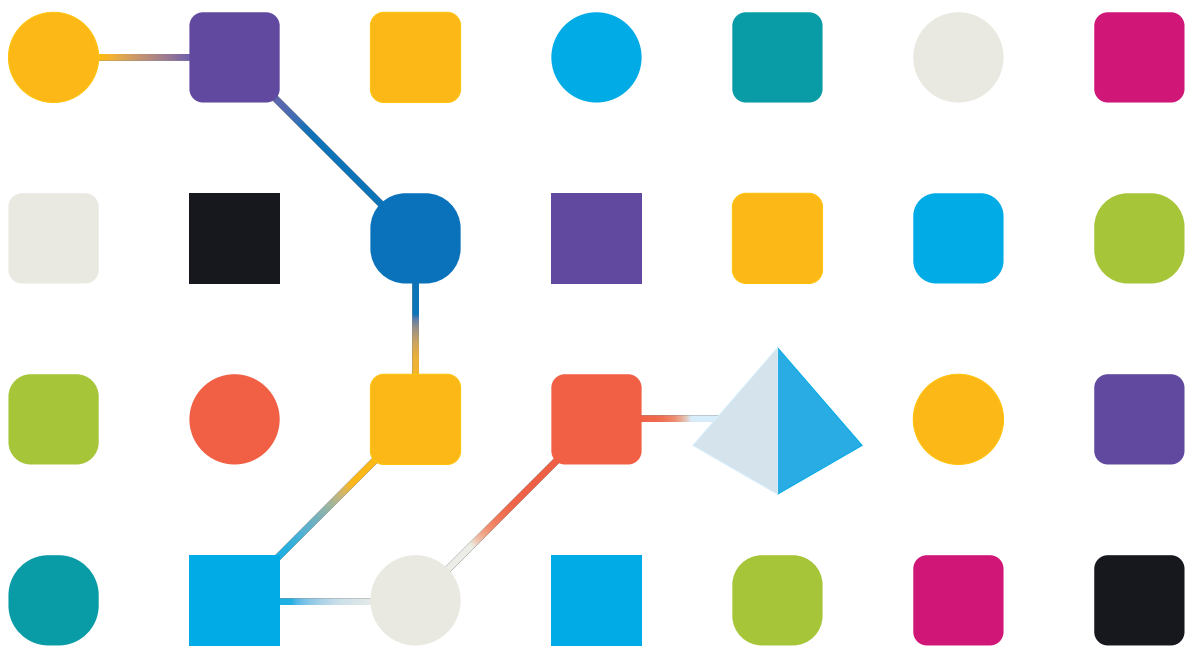# Blue Prism Hub 4.6

User Guide

Document Revision: 1.0

Trademarks and Copyright

The information contained in this document is the proprietary and confidential information of Blue Prism Limited and should not be disclosed to a third-party without the written consent of an authorized Blue Prism representative. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying without the written permission of Blue Prism Limited.

© **Blue Prism Limited, 2001 – 2023**

"Blue Prism", the "Blue Prism" logo and Prism device are either trademarks or registered trademarks of Blue Prism Limited and its affiliates. All Rights Reserved.

All trademarks are hereby acknowledged and are used to the benefit of their respective owners. Blue Prism is not responsible for the content of external websites referenced by this document.

Blue Prism Limited, 2 Cinnamon Park, Crab Lane, Warrington, WA2 0XP, United Kingdom. Registered in England: Reg. No. 4260035. Tel: +44 370 879 3000. Web: www.blueprism.com

Contents

Hub

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

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

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

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

Intended audience

This guide is aimed at Hub users, and provides a brief overview on using Blue Prism Hub. For details on using the plugins, see the user guide for the specific plugin:

- ALM User Guide
- Control Room User Guide
- Decision User Guide
- Interact Plugin User Guide
- Wireframer User Guide

Profile

Profile settings allow you to change your information and Hub viewing preference. The profile settings you can change depend on the authentication type configured for your account. If you are a native user, you can change:

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

If your Hub account is configured to use Active Directory authentication, you can only change your profile picture and your Hub display theme. All other settings are managed in Active Directory and updated when you log into Hub or when manually synchronized by a Hub administrator.

> ✎ You cannot change your username, regardless of your authentication type.

For more information on authentication types, see Authentication settings.

> ✎ To open the Profile page, click your profile icon and the Profile page displays.

Change your profile

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

   The Profile page becomes editable, indicated by the **Edit** button changing to a **Cancel** button and the fields becoming editable.

2. Update the following as required:
   - Update your first name, last name or email address.
   - Toggle the **Dark theme** on or off. By default, Hub is displayed in the light theme.
   - Click **Upload** to select your profile image. The image will be displayed within the prism icon. Images cannot be greater than 1 MB in size.

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

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

Change your password

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

   The Update your password dialog displays.

2. Enter your current password.

3. Enter and repeat your new password.

4. Click **Update**.

   Your password is changed.

Using Hub

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

In this topic:

- Localization
- Dashboards
- Automation Lifecycle Management plugins
- Control Room plugin
- Decision plugin
- Interact plugin
- Log out

Localization

When you open the login page for Authentication Server, localization settings are automatically applied from your web browser. The login page and Hub display in the language most compatible with the language settings configured in the browser. If the language selected in your browser settings is not supported, English is used as the default. If required, you can manually change the language you want to use from the drop-down list on the login page. The supported languages are:

- English (United States)
- French (Français)
- German (Deutsch)
- Japanese (日本語)
- Spanish (Latin American)(Español – Latinoamérica)
- Simplified Chinese (中文)

Dashboards

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

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

Create a dashboard

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

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

Add widgets

Widgets are the dashboard components that can be used to visually display different kinds of information, for example, the Business Process Overview widget. Up to 20 widgets can be added to each dashboard.

1. Click **Add widgets** to display a list of available widgets.

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

   Information about the widget displays, for example:
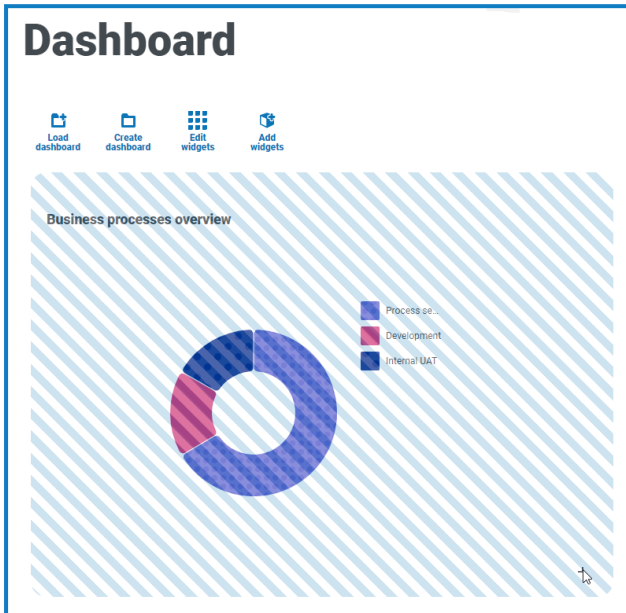

   Click **Cancel** to close the details window.

3. Click the widget name to add it to the dashboard.

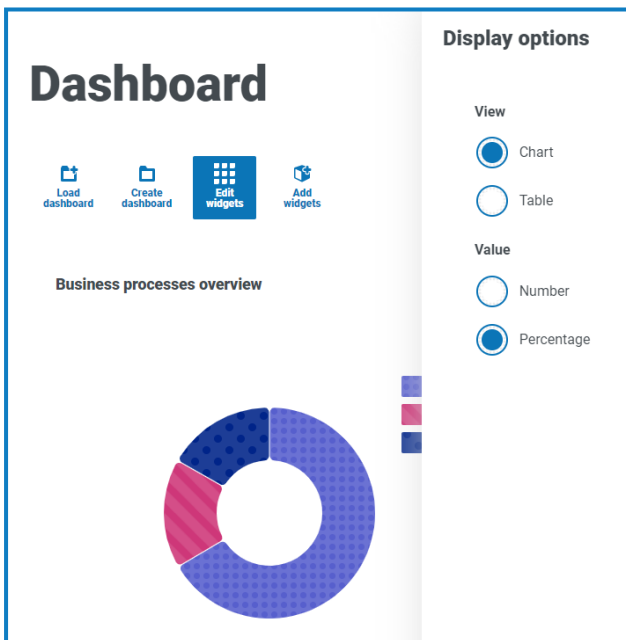   The widget appears on the dashboard and a success message is displayed.

Configure widgets

A widget can be:

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

- **Customized** – Many of the widgets are customizable. Click **Edit widgets** and click **Options** next to the required plugin.

Remove a widget

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

   The widget is removed from the dashboard.

Change the displayed dashboard

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

    A list of available dashboards displays.

2. Click the required dashboard.

    The Dashboard page refreshes with the selected dashboard.

Delete a dashboard

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

    A list of available dashboards displays.

2. Click the delete icon against the required dashboard.

    A message displays asking you to confirm.

3. Click **Yes** to delete the dashboard.

    A notification message displays confirming the dashboard has been deleted.

Automation Lifecycle Management plugin

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

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

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

The ALM plugin provides a framework for business analysts to:

- Capture the process definition of the business process
- Delivering exception handling in a consistent manner
- Review and sign-off the process structure.

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

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

Control Room plugin

> ✎ The Control Room plugin is an optional service that is freely available to use. The Control Room plugin is compatible with Blue Prism 7.0 or later and requires the Blue Prism API.

The Control Room plugin allows you to monitor your digital workforce in a web client, and run schedules. It provides the following features:

- **Work Queues** – Monitor the status of work queue items and track queue activity.
- **Sessions** – View, filter, and organize session activity in each environment.
- **Schedule Activity** – Monitor the status of schedule runs for each environment, filter data and create user-defined views.
- **Schedule Manager** – Control, create, and modify schedules – manage their activity with the help of user-defined views.
- **Digital Worker Health** – View and monitor the Digital Workers in each environment.

The Control Room plugin also provides a number of dashboard widgets, which you can apply and customize to monitor your Blue Prism environments at a glance. These are:

- **Monthly utilization diary** – Enables you to view the utilization of your digital workforce for each day of a month.
- **Utilization chart** – Enables you to view the utilization efficiency of your digital workforce.
- **Utilization heatmap** – Enables you to view patterns, peaks and troughs of activity for the digital workforce.
- **Work queue compositions** – Enables you to view the composition of work queue items across your work queues.

For more information, see the Control Room user guide.

Decision plugin

> ✎ The Decision plugin is an optional service that requires an additional license key to operate.

Blue Prism® Decision provides Blue Prism users with the ability to train and deploy intelligent machine-learning decision-making models within their Digital Workforce, without requiring any data science expertise. Blue Prism Decision's simple and intuitive user interface allows users to:

- **Define a model** – Add a title, description, decision type, and decision variables.
- **Train the model** – Use active learning based on defined input variables specified by the model service, without needing any data science knowledge to produce statistically accurate machine-learning models.
- **Calibrate the model** – Review model inputs and outcome predictions, and overwrite model decisions if required.

For more information, see the Decision user guide.

Interact plugin

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

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

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

For more information, see the Interact plugin user guide.

Log out

Click **Logout** to log out of Hub.

🖉 If you use Interact, you will also be logged out of the Interact web application.