



Blue Prism Hub Control Room 4.7

User Guide

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Control Room

The Control Room plugin is a freely available plugin within Blue Prism® Hub that lets you view and manage Blue Prism activity for all your environments – view schedules, monitor work queues, oversee session activity, and more.

The Control Room plugin components utilize well-established Blue Prism functionality:

- [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 environment 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.

Dependencies

The Control Room plugin requires access to the following components:

- **Blue Prism Hub 4.7** – For information on installing Blue Prism Hub, see the [Blue Prism Hub installation guide](#).
- **Blue Prism API 7.1** – For information on installing the Blue Prism API, see the [Blue Prism API installation guide](#).
- **Blue Prism 7.1** – For information on installing Blue Prism 7.1, see the [Blue Prism installation guide](#).

Installation and access

To use the Control Room plugin, a Blue Prism® Hub administrator needs to install it and provide you with access.

Prerequisites

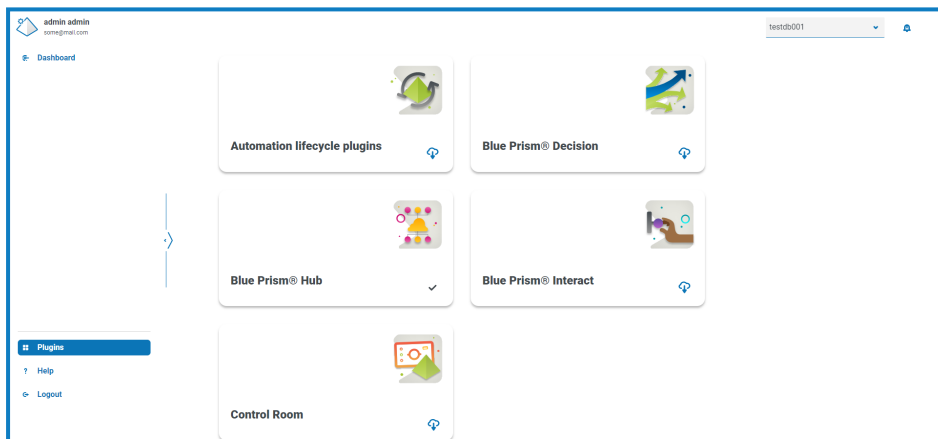
For the Control Room plugin to function, the following must be configured:


- The Control Room plugin requires Blue Prism 7.1 or later.
- Blue Prism Hub 4.7 installed. For information, see the [Blue Prism Hub installation guide](#).
- The URL of the Blue Prism API must be known to Hub. This is configured when adding or editing environments in Hub's [Environment Manager](#).
- Authentication Server must be configured to authorize the user to view the Blue Prism data within the Control Room plugin. For more information, see the [Authentication Server configuration guide](#).

Install the Control Room plugin


The Control Room plugin must be installed from the Plugin Repository by a Hub administrator.

1. If you are a Hub administrator, log into Hub and click **Plugins** to open the plugin repository.



2. On the **Control Room** tile, click the download icon  in the bottom corner to initiate the install.

The plugin installs and a message displays informing you that the site is restarting. Once complete, the plugin repository displays and the download icon on the **Control Room** tile is replaced with a tick. Deploying the Control Room plugin will also add extra [dashboard widgets](#) to the Hub dashboard.

 The site restart will affect all users who are logged into Hub. Although this does not take long, it is recommended that this is performed outside normal working hours to minimize disruption.

Configure access to the Control Room plugin

The Control Room plugin is automatically available to Hub administrators. Users need to be added to a role that provides access to the Control Room. This access can be given via a new role or added to an existing user role. If a role does not already exist, a new role can be created in the Settings page of Hub to grant access to the plugin:

Create role

Cancel Save Delete

Role information

Role name *

Control Room

Select role type

Hub

Interact

Role description

Role with access to the Control Room plugin

Add plugin


Control Room


Add user

No data available

(testuser1004) Test User1004

1. On the Roles and permissions page, click **Create role**.
The Create role section displays.
2. Enter a role name and select **Hub**.
3. If required, enter a description.
4. Select **Control Room** from the **Add plugin** drop-down list.
5. Select the users that will be assigned this role from the **Add user** drop-down list. The list only displays Hub users and not Interact users.
6. Click **Save** to create the role and allow access to the specified users.

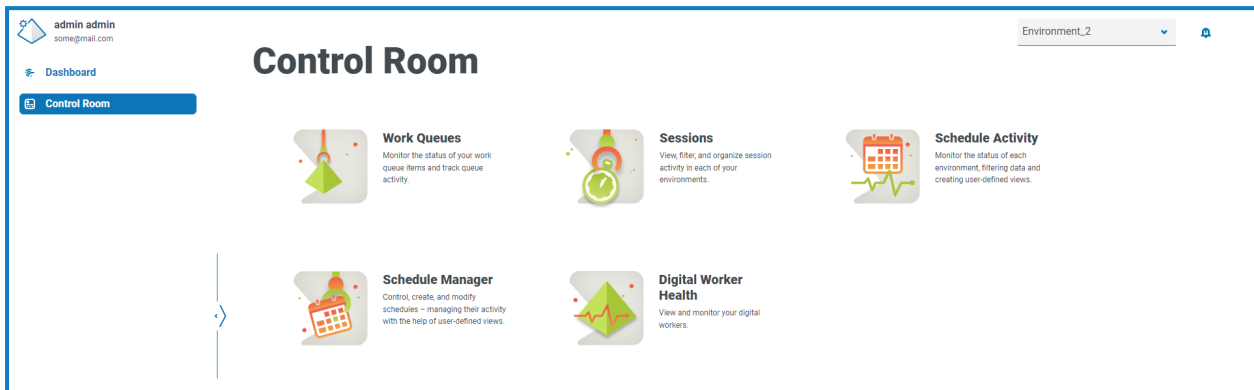
 This procedure and screenshot reflect a Hub environment that has not been configured to use Active Directory authentication. If your organization has implemented Active Directory authentication, you will also be able to add users to the role using Active Directory security groups. For more information, see the [Hub administrator guide](#).

 Users can be added to and removed from existing roles by selecting the required role on the Roles and permissions page and clicking **Edit**. For more information, see the [Hub user guide](#).

Although this role allows users to access the plugin, both users and Hub administrators are unable to see any data in the Control Room plugin if their account is not synchronized with Blue Prism through Authentication Server. If your organization is using the default administrator (admin) credentials for Hub, this account will also need to be synchronized if you want to use it to view the Control Room data. When selecting a user from Blue Prism to synchronize with the Hub admin user, it is recommended at least one administrator account in Blue Prism is not synchronized with Hub to enable access for troubleshooting in the event of any connection issues. For more information, see the [Authentication Server configuration guide](#).

Open Control Room

After the Hub administrator has installed the plugin and provided you access, click **Control Room** from the navigation menu.



The following tiles are available:

- [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.

Select the environment

You can use the drop-down list in the top left of all Control Room pages to change the Blue Prism environment that you are viewing. Environments in the list must be pre-configured and are setup in Hub's [Environment Manager](#).

Work Queues

The Work Queues page provides you with a summary of all the work queues that are currently running or paused for your connected Blue Prism environments. These are all the Blue Prism work queues in your environment, including active queues. When you open the Work Queues page, the Overview page is shown by default:

Queue name	Group name	Status	Locked	Completed	Pending	Exception	Average case time
Account Maintenance		Running	0	0	6	0	00:00:00
Claims		Running	0	0	0	0	00:00:00
Customer Support		Running	0	0	0	0	00:00:00
IT Help Desk		Running	0	0	0	895	00:00:05
Test Green Tick		Running	0	0	0	0	00:00:00

The Work Queues – Overview page provides you with the following information and functions:

- A. **Overview** – Displays the [Work Queues Overview](#) page. This shows the work queues that are running or paused in your Blue Prism environment. This is the default view.
- B. **Items** – Displays the [Work Queues Items](#) page. This shows the items within a work queue.
- C. **Edit view** – Define the columns that are displayed. You can then show or hide the columns using the toggle switches. You can also change the grid to display in a compact format.
- D. **Filter** – Filter the information that is displayed. You can turn on the [required filters](#) and enter or select the appropriate information for display, for example, you could turn on the **Status** filter and select **Paused**.
- E. **Save view** – Save your current column view. You can enter a name for your view to make it easily identifiable when loading views. This allows you to create views of information which you can quickly access and reapply using **Load view**.
- F. **Load view** – Load a saved view. You can select the required view and click **Apply**.
- G. **Auto refresh** – Define how often the table contents will automatically refresh. By default it is disabled, but can be set to every minute, five minutes, 10 minutes, or 30 minutes.
- H. **Refresh now** – Refresh the table contents. If operating with auto refresh configured, using this option will reset the timer.
- I. **Last updated** – The date and time the table data was last refreshed.
- J. **Rows per page** – Enter a number, or use the up and down arrows, to change the number of rows seen on a page.
- K. **Previous and Next** – Click **Previous** or **Next** to move through the pages of work queues.

View your work queues

The Work Queues – Overview page provides you with a summary of all the work queues that are currently running or paused across your Blue Prism environments. By default, the columns display the number of completed, locked, and pending queue items, and any that have resulted in an exception.

To view the details of a queue, perform one of the following actions:

- Click the name of the queue in the **Queue name** column.

The **Items** page displays for the selected queue.

- Click **Items**.

The **Items** page displays with the most recently accessed queue. This will be the first queue in the queue list if it is the first time you opened this page since you logged in.

Use the filters on the Work Queues – Overview page


The filters enable you to easily find work queues based on the selected criteria.

1. On the Work Queues – 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 work queue. You can apply multiple filters at the same time.

The available filters are:

Filter	Description
Queue name	Enter the full or partial name of the Blue Prism work queue.
Status	Select the status of the work queue from the following options: <ul style="list-style-type: none"> • Running – Displays all the work queues that are currently running. • Paused – Displays all the work queues that are paused and not actively running.
Locked	Enter a numerical range to filter against the number of items in the work queue that are locked. You can enter a minimum item count, a maximum item count, or both to search between values.
Completed	Enter a numerical range to filter against the number of items in the work queue that have been completed. You can enter a minimum item count, a maximum item count, or both to search between values.
Pending	Enter a numerical range to filter against the number of items in the work queue that are still pending. You can enter a minimum item count, a maximum item count, or both to search between values.
Exception	Enter a numerical range to filter against the number of items that have raised exceptions in the work queue. You can enter a minimum item count, a maximum item count, or both to search between values.

The information on the Work Queues – Overview page is immediately filtered displaying any matches that contain the text you have entered.

 If you have set the filters but want to view the unfiltered information again, either click **Reset filters** in the panel, or 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.

View your work queue items

The Work Queues – Items page provides you with information about the status of your queue items. The page displays the items for the work queue that you have selected on the [Overview](#) page, but you can change the queue using the **Queue** drop-down list.

The screenshot shows the 'Work Queues' page for 'Account Maintenance'. It features a table with the following data:

State	Item key	Priority	Status	Tags	Resource	Attempt	Created	Last updated	Next review	Completed	Total work time	Exception date	Exception reason
...	Pending	0	New		v7stage1-bps	1	18/10/2021 10:17:50	18/10/2021 10:17:50			0		
...	Pending	1234	New	# Test	v7stage1-bps:8182	1	23/09/2021 11:40:43	23/09/2021 11:40:43			0		
...	Pending	1234	New	# Test	v7stage1-bps:8182	1	23/09/2021 11:40:33	23/09/2021 11:40:33			0		
...	Pending	1234	New	# Test	v7stage1-bps:8182	1	23/09/2021 11:40:05	23/09/2021 11:40:05			0		
...	Pending	0	New		v7stage1-bps	1	23/09/2021 11:24:59	23/09/2021 11:24:59			0		
...	Pending	0	New		v7stage1-bps:8183	1	23/09/2021 11:24:39	23/09/2021 11:24:39			0		

Use the filters on the Work Queues – Items page

The filters enable you to easily find work queues based on the selected criteria.


1. On the Work Queues – Items page, click **Filter** to open the Filter panel.
2. Use the toggles to turn on the required filters, and complete the information to view the work queues. You can apply multiple filters at the same time.

The available filters are:

Filter	Description
Item key	Enter the full or partial item key.
Priority	Enter a numerical range to filter against the item's priority. You can enter a minimum priority, a maximum priority, or both to search between values.
Status	Enter the full or partial work queue item status.
Attempt	Enter a numerical range to filter against number of attempts made to retry the work queue item. You can enter a minimum attempt count, a maximum attempt count, or both to search between values.
Created	Select the required time period that the work queue creation time falls within from the drop-down list. If you select A given range , enter the date range and times in the fields provided.

Filter	Description
Last updated	Select the required time period that the work queue last updated time falls within from the drop-down list. If you select A given range , enter the date range and times in the fields provided.
Next review	Select the required time period that the next review time falls within from the drop-down list. If you select A given range , enter the date range and times in the fields provided.
Completed	Select the required time period that the completed time falls within from the drop-down list. If you select A given range , enter the date range and times in the fields provided.
Total work time	Enter a numerical range to filter against the item's total work time. You can enter a minimum total work time, a maximum total work time, or both to search between values.
Exception date	Select the required time period that the exception date falls within from the drop-down list. If you select A given range , enter the date range and times in the fields provided.
Exception reason	Enter the full or partial work queue item exception reason.

The information on the Work Queues – Items page is immediately filtered displaying any matches that contain the text you have entered.

 If you have set the filters but want to view the unfiltered information again, either click **Reset filters** in the panel, or 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.

Schedule Activity

The Schedule Activity page provides you with a summary of all past schedule runs in your connected environment. This is the same information that you see in the Blue Prism interactive client when running scheduler reports (Blue Prism interactive client > Control Room > Scheduler > Reports), and shows the times a schedule has been run.

The screenshot displays the 'Schedule Activity' page in the Control Room. At the top, there is a breadcrumb 'Control Room > Schedule Activity' and a dropdown menu for 'Environment_2'. Below the title, there is a toolbar with icons labeled A through G: A (Edit view), B (Filter), C (Save view), D (Load view), E (Auto refresh), F (Refresh now), and G (Last updated: 08/02/2022 13:33:22). The main content is a table with the following columns: Status, Schedule name, Server name, Start time, and End time. The table lists 10 schedule runs, with statuses ranging from 'Completed' to 'Terminated'. The 'Schedule name' column includes links to 'Schedule Manager'. At the bottom, there is a 'Rows per page' dropdown set to 10 (labeled I) and navigation buttons for 'Previous' and 'Next' (labeled J).

Status	Schedule name	Server name	Start time	End time
✓ Completed	Order Processing	v7stage1-bps:9898	08/02/2022 13:33:09	08/02/2022 13:33:09
✓ Completed	New: Data migration - 5 Digital Workers	v7stage1-bps:9898	08/02/2022 13:33:09	08/02/2022 13:33:09
✗ Terminated	IT: Data migration - 5 Digital Workers	v7stage1-bps:9898	08/02/2022 13:33:09	08/02/2022 13:33:09
✓ Completed	IT: Data migration	v7stage1-bps:9898	08/02/2022 13:33:09	08/02/2022 13:33:09
✓ Completed	Order Processing	v7stage1-bps:9898	08/02/2022 13:32:09	08/02/2022 13:32:09
✓ Completed	New: Data migration - 5 Digital Workers	v7stage1-bps:9898	08/02/2022 13:32:09	08/02/2022 13:32:09
✗ Terminated	IT: Data migration - 5 Digital Workers	v7stage1-bps:9898	08/02/2022 13:32:09	08/02/2022 13:32:09
✓ Completed	IT: Data migration	v7stage1-bps:9898	08/02/2022 13:32:09	08/02/2022 13:32:09
✓ Completed	Order Processing	v7stage1-bps:9898	08/02/2022 13:31:09	08/02/2022 13:31:09
✓ Completed	New: Data migration - 5 Digital Workers	v7stage1-bps:9898	08/02/2022 13:31:09	08/02/2022 13:31:09


The Schedules Activity page provides you with the following information and functions:

- Edit view** – Define the columns that are displayed. You can then show or hide the columns using the toggle switches. You can also change the grid to display in a compact format.
- Filter** – Filter the information that is displayed. You can turn on the [required filters](#) and enter or select the appropriate information for display, for example, you could turn on the **Status** filter and select **Completed**.
- Save view** – Save your current column view. You can enter a name for your view to make it easily identifiable when loading views. This allows you to create views of information which you can quickly access and reapply using **Load view**.
- Load view** – Load a saved view. You can select the required view and click **Apply**.
- Auto refresh** – Define how often the table contents will automatically refresh. By default it is disabled, but can be set to every minute, five minutes, 10 minutes, or 30 minutes.
- Refresh now** – Refresh the table contents. If operating with auto refresh configured, using this option will reset the timer.
- Last updated** – The date and time the table data was last refreshed.
- Schedule name** – Click on the name of a schedule to view in [Schedule Manager](#).
- Rows per page** – Enter a number, or use the up and down arrows, to change the number of rows seen on a page.
- Previous and Next** – Click **Previous** or **Next** to move through the pages of schedules.

View the schedule activity

The Schedules Activity page provides you with a summary of all the times a schedule has run in your environment. By default, the columns display the status of the schedule, the name, the server, and the start and end time (if the schedule has finished).

Click a name in the **Schedule name** column to open the [Schedule Manager](#) page, where you see the current schedule definition.

 When navigating from the Schedule Activity page, the Schedule Manager page will be automatically filtered by the relevant schedule. To see all schedules, clear the **Filter by schedule name** field.

Use the filters on the Schedule Activity page

The filters enable you to easily view schedules based on the selected criteria. Alternatively, click a column to sort in ascending or descending order based on the column value.

1. On the Schedules Activity 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 schedule. You can apply multiple filters at the same time.

The available filters are:

Filter	Description
Status	<p>Select the status of the schedule from the following options:</p> <ul style="list-style-type: none"> • Completed – Displays schedules that have run successfully and completed. • Terminated – Displays schedules that have terminated and not completed. • Part exceptioned – Displays schedules where some tasks have resulted in exceptions. • Running – Displays schedules that are currently running. • Pending – Displays schedules that are due to run. <p>You can filter on more than one status at the same time.</p>
Schedule name	Enter the full or partial name of the schedule.
Server name	Enter the full or partial name of the application server on which the schedule was run.
Start time	Select the required time period that the start time falls within from the drop-down list. If you select A given range , enter the date range and times in the fields provided.
End time	Select the required time period that the end time falls within from the drop-down list. If you select A given range , enter the date range and times in the fields provided.

The information on the Schedules Activity page is immediately filtered displaying any matches that contain the text you have entered.

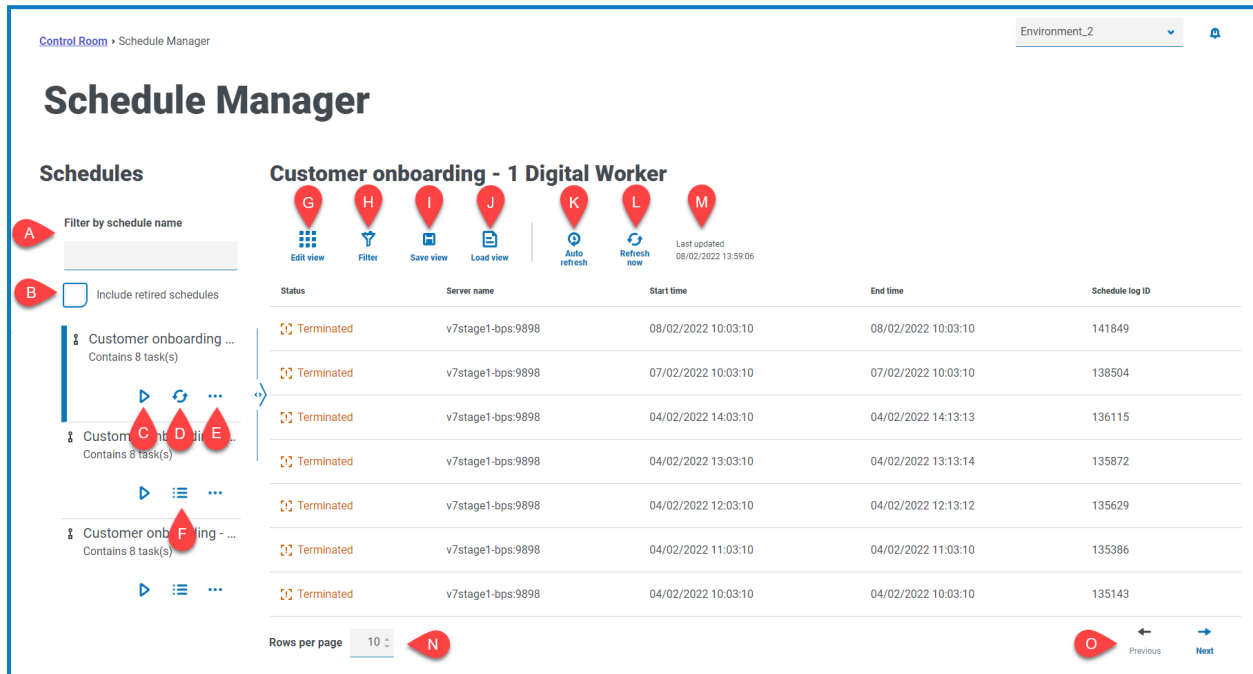


If you have set the filters but want to view the unfiltered information again, either click **Reset filters** in the panel, or turn off the required filters, or remove any settings within the filter so that it is blank.

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

Schedule Manager

The Schedule Manager page lets you control, create, and modify all the schedules for your connected environment. These are the same schedules that you see in the Blue Prism interactive client Control Room.



The Schedule Manager page consists of a schedule list, schedule actions, and schedule activity for the selected schedule. It provides you with the following information and functions:

Schedule list

- A. **Filter by schedule name** – Search for [specific schedules](#).
- B. **Include retired schedules** – Display retired schedules in the schedule list.

Schedule actions

- C. **Run (play icon)** – [Run](#) the selected schedule.
- D. **Refresh (refresh icon)** – Refresh the activity for the currently selected schedule. This icon replaces the schedule activity icon when a schedule is selected.
- E. **Additional actions (ellipsis icon)** – Perform [additional actions](#) on the schedule, such as, editing, deleting, cloning, and retiring.
- F. **Schedule activity (line icon)** – Display the [schedule activity](#) for the selected schedule in the pane to the right.

Schedule activity

- G. **Edit view** – Define the columns that are displayed. You can then show or hide the columns using the toggle switches. You can also change the grid to display in a compact format.
- H. **Filter** – Filter the information that is displayed. You can turn on the [required filters](#) and enter or select the appropriate information for display, for example, you could turn on the **Status** filter and select **Completed**.


- I. **Save view** – Save your current column view. You can enter a name for your view to make it easily identifiable when loading views. This allows you to create views of information which you can quickly access and reapply using **Load view**.
- J. **Load view** – Load a saved view. You can select the required view and click **Apply**.
- K. **Auto refresh** – Define how often the table contents will automatically refresh. By default it is disabled, but can be set to every minute, five minutes, 10 minutes, or 30 minutes.
- L. **Refresh now** – Refresh the table contents. If operating with auto refresh configured, using this option will reset the timer.
- M. **Last updated** – The date and time the table data was last refreshed.
- N. **Rows per page** – Enter a number, or use the up and down arrows, to change the number of rows seen on a page.
- O. **Previous and Next** – Click **Previous** or **Next** to move through the pages of schedules.


Find a specific schedule

1. On the Schedules page, start typing in the **Filter by schedule name** field.
The list of schedules reduces to only those that match the text entered in the field.
2. To view all the schedules again, clear the text in the **Filter by schedule name** field.

Run a schedule



You can manually run a schedule rather than wait for it to be triggered at the scheduled time. Manually running the schedule does not impact the schedule that has been configured, it will still be triggered to run at the scheduled time.

 If a schedule is already running, another run cannot be manually triggered.

1. On the Schedules page, click the run icon  for the required schedule.
A message displays asking you to confirm that you want to run the schedule now.
2. Click **Run** to run the schedule.
A message displays confirming the schedule is set to run.

View schedule activity

To view the activity for a specific schedule:

1. Click the schedule activity icon  for the required schedule.
The schedule activity is shown in the pane and the icon changes to a refresh icon.
2. If required, click the refresh icon  to update the schedule activity.

Additional actions

You can perform additional tasks to manage your schedules by clicking on the ellipsis icon (...) on a schedule and selecting from the following actions:

- [View details](#)
- [Delete](#)
- [Clone](#)
- [View tasks and sessions](#)
- [Retire](#)
- [Edit](#)
- [Stop](#)



The above actions will only display if you have the correct user permissions assigned to your account. For more details, see [User permissions](#).

View details

To view schedule details:

1. Click the ellipsis icon (...) on the relevant schedule, and select **View details**.
The Details pane displays, containing the schedule's configuration details. You can also access the [Edit schedule](#) page by selecting the **Edit** button.
2. Click **Close drawer** to return to the Schedule Manager.

Delete

To delete a schedule:

1. Click the ellipsis icon (...) on the relevant schedule, and select **Delete**.
A message displays containing the name of the schedule and asks you to confirm the action.



Once deleted, schedules cannot be restored.

2. Click **Delete schedule**.

Clone

To clone a schedule:

1. Click the ellipsis icon (...) on the relevant schedule, and select **Clone**.
The Clone schedule page displays, and is automatically populated with all details of the existing schedule.
2. Configure the details as required. As part of the cloning process, you can choose to retire the existing schedule by selecting the **Would you like to retire <schedule name>?** check box.
3. Click **Save**.
The Schedule Manager page displays, filtered by the cloned schedule name.

View tasks and sessions

To view a schedule's tasks and sessions:

1. Click the ellipsis icon (...) on the relevant schedule, and select **View tasks and sessions**.
The tasks and sessions pane displays, where you can view and add tasks and sessions.
2. To add a task, use the **Add task** button in the top right of the pane.
3. Use the arrow icon on a task to expand and view the task's sessions.
4. To add a session, click the ellipsis icon (...) on the relevant task and select **Add session**.
5. Click **Close drawer** to return to the Schedule Manager.

For more details on configuring tasks and sessions, see [Tasks and sessions on page 23](#)

Retire

To retire a schedule:

1. Click the ellipsis icon (...) on the relevant schedule, and select **Retire**.
A message displays containing the name of the schedule and asks you to confirm the action. Retired schedules can be restored, whereas deleted schedules are unrecoverable.
2. Click **Retire**.
The schedule is marked as retired on the schedule card, and will only display in the Schedules list if the **Include retired schedules** check box is enabled. To restore a schedule, click the ellipsis icon on the relevant schedule, and select **Unretire**.

Edit

To edit a schedule:

1. Click the ellipsis icon (...) on the relevant schedule, and select **Edit**.
The edit schedule page displays.
2. Configure any details as required.
3. Click **Save**.

For more details on configuring schedules, see [Update schedule configuration on page 20](#)

Stop

To stop a currently running schedule:

1. Click the ellipsis icon (...) on the relevant schedule, and select **Stop**.
A message displays containing the name of the schedule and asks you to confirm the action.
2. Click **Yes, stop now**.

Use the filters on the Schedule Manager page


The filters enable you to easily find schedule activity based on the selected criteria. Alternatively, click a column to sort in ascending or descending order based on the column value.

1. On the Schedules Manager 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 schedule. You can apply multiple filters at the same time.

The available filters are:

Filter	Description
Status	<p>Select the status of the schedule from the following options:</p> <ul style="list-style-type: none"> • Completed – Displays schedules that have run successfully and completed. • Terminated – Displays schedules that have terminated and not completed. • Part exceptioned – Displays schedules where some tasks have resulted in exceptions. • Running – Displays schedules that are currently running. • Pending – Displays schedules that are due to run. <p>You can filter on more than one status at the same time.</p>
Server name	Enter the full or partial name for the schedule server.
Start time	Select the required time period that the start time falls within from the drop-down list. If you select A given range , enter the date range and times in the fields provided.
End time	Select the required time period that the end time falls within from the drop-down list. If you select A given range , enter the date range and times in the fields provided.

The information on the Schedules Manager page is immediately filtered displaying any matches that contain the text you have entered.

 If you have set the filters but want to view the unfiltered information again, either click **Reset filters** in the panel, or 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.

Update schedule configuration

The Schedule Manager allows you to update all schedule configuration detail, including creating and editing tasks and sessions.

Schedules

The Edit schedule page allows you to update all schedule configuration details. This page is accessed from the Schedule Manager page by clicking the ellipsis icon (...) on the relevant schedule and selecting **Edit**. It can also be opened by using the **Edit** icon in the Details drawer.



The edit options only display for users with the relevant scheduler permission enabled on their account.

The Edit schedule page consists of two tabs: **Details** and **Schedule**.

Details

On the Details tab, you have the following fields:

Field	Description
Name	The schedule name.
Description	The schedule description.
Select the initial task	The first task that will be executed when the schedule is activated.

Make any edits as required, and save your changes using the **Save** icon in the top right of the page.

Schedule

On the Schedule tab, you have the following fields:

The screenshot shows the 'Edit schedule' window with the following fields and options:

- Start date ***: 30/09/2021
- Start time ***: 10:03:10
- Time zone**:
 - Don't restrict to any time zone
 - Use time zone
- Select time zone ***: (UTC) Coordinated Universal Time
 - Adjust for daylight saving
- Run occurrence**:
 - Once
 - Repeat
- Repeat every Interval**: Hour
- Occurrence ***: 1
- Between Start time ***: 00:00:00
- End time ***: 23:59:59
- Calendars**:
 - Don't restrict to any calendars
 - Use calendar days
- Expires**:
 - Never
 - On this date and time

Field	Description
Start date	The schedule start date.
Start time	The schedule start time.
Time zone	Define if a time zone is used. Defaults to Use time zone . If Don't restrict to any time zone is selected, the schedule will use the time zone of the application server on which Hub Control Room is operating.
Select time zone	The time zone to be applied when the schedule is run.
Adjust for daylight saving	Determine if you want the schedule to automatically update to reflect daylight savings changes in the selected time zone.
Run occurrence	Determine if the schedule is repeated. Defaults to Repeat .
Repeat every – Interval	How often the schedule is executed, and can be set to Minute , Hour , Day , Week , Month , or Year .
Repeat every – Occurrence	Used with Interval to determine how often a schedule will run.
Calendars	Determine if the schedule is only run on specific days specified in a calendar. It defaults to Don't restrict to any calendars , but if Use calendar days is selected, you can choose a calendar from the drop-down list to apply to the schedule.
Expires	Define an expiry date and time which will cause the schedule to stop being executed on or after the specified date/time. Defaults to Never .

Running minutely

To configure schedules to run minutely:

1. Select **Minute** from the **Repeat every – Interval** field.
2. In the **Occurrence** field, define the number of minutes. You can configure the schedule to run every minute, every 2 minutes, and so on, up to a maximum of 999 minutes.
3. Enter a **Start time** and **End time**. By default, the schedule will run each interval it is due to run, but this can be further constrained by setting the times between which the schedule should be executed.
4. Optionally, select **Use calendar days** to configure the schedule to run minutely on work days as configured in a predefined calendar. Select the required calendar from the drop-down list.
5. Save your changes using the **Save** icon in the top right of the page.

Running hourly

To configure schedules to run hourly:

1. Select **Hour** from the **Repeat every – Interval** field.
2. In the **Occurrence** field, define the number of hours. You can configure the schedule to run every hour, every 2 hours, and so on, up to a maximum of 999 hours.
3. Enter a **Start time** and **End time**. By default, the schedule will run each interval it is due to run, but this can be further constrained by setting the times between which the schedule should be executed.
4. Optionally, select **Use calendar days** to configure the schedule to run hourly on work days as configured in a predefined calendar. Select the required calendar from the drop-down list.
5. Save your changes using the **Save** icon in the top right of the page.

Running daily

To configure schedules to run daily:

1. Select **Day** from the **Repeat every – Interval** field.
2. In the **Occurrence** field, define the number of days. You can configure the schedule to run every day, every 2 days, and so on, up to a maximum of 999 days.
3. Optionally, select **Use calendar days** to configure the schedule to only run on work days as configured in a predefined calendar. Select the required calendar from the drop-down list.

Running weekly

To configure schedules to run weekly:

1. Select **Week** from the **Repeat every – Interval** field.
2. In the **Occurrence** field, define the number of weeks. You can configure the schedule to run every week, every 2 weeks, and so on, up to a maximum of 999 weeks.
3. Select the required option from the **Repeat** field. By default, the schedule will run every week on the same day as the **Start date**. This can be modified by selecting either of the options **First working day of the calendar** or **Last working day of the calendar**, and choosing a predefined calendar from the drop-down list.
4. Save your changes using the **Save** icon in the top right of the page.

Running monthly

To configure schedules to run monthly:

1. Select **Month** from the **Repeat every – Interval** field.
2. In the **Occurrence** field, define the number of months. You can configure the schedule to run every month, every 2 months, and so on, up to a maximum of 999 months.
3. Select the required option from the **Repeat** field. By default, the schedule will run every month on the same date as the **Start date**, skipping any months in which the date doesn't exist. Instead of skipping, the schedule can be configured to run on the last day of the month, or the first day of the following month if the configured date doesn't exist for a particular month. This can be set by selecting the appropriate value from the **If day 30 does not exist** drop-down list.

Alternatively, the schedule can be configured to run every month on a counted occurrence of a weekday within the month, for example, first Friday, last Wednesday, and so on. This is activated by selecting the **Day of the month** option, and configuring the relevant **Week** and **Day of week**.

The schedule can also be configured to run every month on the first or last working day of the month, according to a specified calendar. This is activated by selecting the **Day of the calendar** option, and configuring the relevant **Day** and calendar from the drop-down list.

4. Save your changes using the **Save** icon in the top right of the page.

Running yearly

To configure schedules to run yearly:

1. Select **Year** from the **Repeat every – Interval** field.
2. In the **Occurrence** field, define the number of years. You can configure the schedule to run every year, every 2 years, and so on, up to a maximum of 999 years.
3. Save your changes using the **Save** icon in the top right of the page.

Tasks and sessions

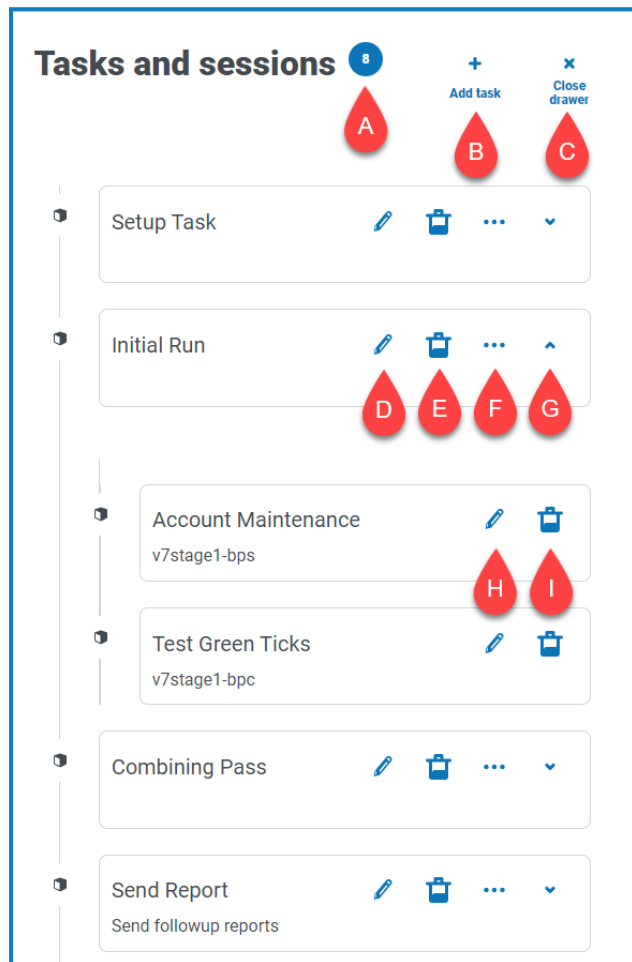
The Tasks and sessions pane allows you to manage a schedule's tasks and sessions. This is opened by from the Schedule Manager page by clicking the ellipsis icon (...) on the relevant schedule and selecting **View tasks and sessions**.

Tasks

A task represents a component of a schedule. It defines a set of sessions which are to be executed concurrently and it provides a combined status outcome of those sessions so that the scheduler can determine which task to execute next.

Sessions

A Blue Prism session represents a single instance of a process (or object) which is assigned to a resource. The session maintains a state (for example, pending, running, completed) and is used to hold supplementary information such as which user initiated the session, the start time, end times, and a detailed session log. Each task can contain an arbitrary number of sessions. When the task is triggered, each session is first created and, once they are all registered and pending on their host resources, they are run.



The Tasks and sessions pane provides you with the following information and functions:

- A. **Number of tasks** – Displays how many tasks the schedule has configured.
- B. **Add task** – Add a new task. This option opens the [Add tasks](#) page.
- C. **Close drawer** – Close the Tasks and session pane.
- D. **Edit task (edit icon)** – Edit the task. This option opens the Edit task page, where you can update the task details.
- E. **Delete tasks (delete icon)** – Delete the task.
- F. **Add session (ellipsis icon)** – Add a session for the task. This option opens the [Add sessions](#) page, where you define a process and digital worker, before adding any start-up parameters.
- G. **Expand (arrow icon)** – Expand to view any sessions configured for the task.
- H. **Edit session (edit icon)** – Edit the session. This option opens the Edit session page, where you can edit the session's details and start-up parameters.
- I. **Delete session (delete icon)** – Delete the session.

Add tasks

The Add task page lets you configure all required detail for the task.

Control Room > Schedule Manager > Customer onboarding - 1 Digital Worker > Add task

Add task

Name *

First Task

Description

On success

Stop

Go to task

On failure

Abort

Go to task

Post completion delay *

Seconds

0

Fail fast on any errors

Create

To add a task:

1. Enter a **Name**.
2. If required, enter a **Description**.
3. In the **On success** field, choose what will happen when the task succeeds. It defaults to **Stop**, but can be configured to automatically trigger another task.
4. In the **On failure** field, choose what will happen when the task fails. It defaults to **Abort**, but can be configured to automatically trigger another task.
5. If required, amend the **Post completion delay** value. It defaults to **0**. If a value is entered in this field, a delay of up to 1500 seconds is added to the end of a scheduled task before allowing the next task in the schedule to commence.

6. If required, clear the **Fail fast on any errors** check box. By default, a task is configured to fail fast on any errors, that is to immediately terminate the task if any sessions fail to start or terminate due to an exception.
- If a task is set to fail fast, all sessions and the task will be terminated when any errors in any of the sessions occur, for example, if a resource couldn't be contacted or was too busy to create a session, or if a session raised an exception and terminated abnormally. This means that a task is marked as terminated if any sessions fail.
 - If a task is set not to fail fast, a task is only terminated if an error occurs in all of its sessions – and that task termination only takes place when the last running session is detected to have failed. Any individual session executions which cause an error are logged, but any other running sessions continue. If not failing fast, a task is marked as terminated only if all of its sessions fail.

Add sessions

The Add session page lets you configure all detail required for the session.

Control Room > Schedule Manager > Customer onboarding - 1 Digital Worker > Add session

Add session

Session details

Add a session to enable editing of the start up parameters

Process *
Start typing to begin filtering, or select an option.

Digital worker *
Start typing to begin filtering, or select an option.

Cancel Add session

To add a session:

1. Enter a **Process**, or select one from the drop-down list.
2. Enter a **Digital worker**, or select one from the drop-down list.

3. Click **Add session**. The button is only enabled when a valid process and digital worker combination has been entered.

The Edit session page displays.

The screenshot displays the 'Edit session' page. At the top, there is a breadcrumb trail: 'Control Room > Schedule Manager > Customer onboarding - 1 Digital Worker > Edit session'. The main heading is 'Edit session'. Below it, the 'Session details' section contains three fields: 'Process' with the value 'IT Help Desk', 'Digital worker' with the value 'v7stage1-bpc', and 'Session number' with the value '209'. A note under 'Session number' states: 'This is the unique identifier for this session.' To the right, the 'Start up parameters' section has three text input fields labeled 'ID', 'Name', and 'RequestType', each with a note 'Parameter type is Text'. At the bottom of this section are 'Cancel' and 'Save' buttons.



Once the session is added, it is automatically assigned a Session number. The Session number, Process, and Digital worker cannot be edited.

4. Define any start-up parameters as required. Parameters are shown with the name and parameter type. When adding image start-up parameters, the following file formats are accepted: PNG, BMP, JPG, JPEG, GIF, ICO, and TIFF.

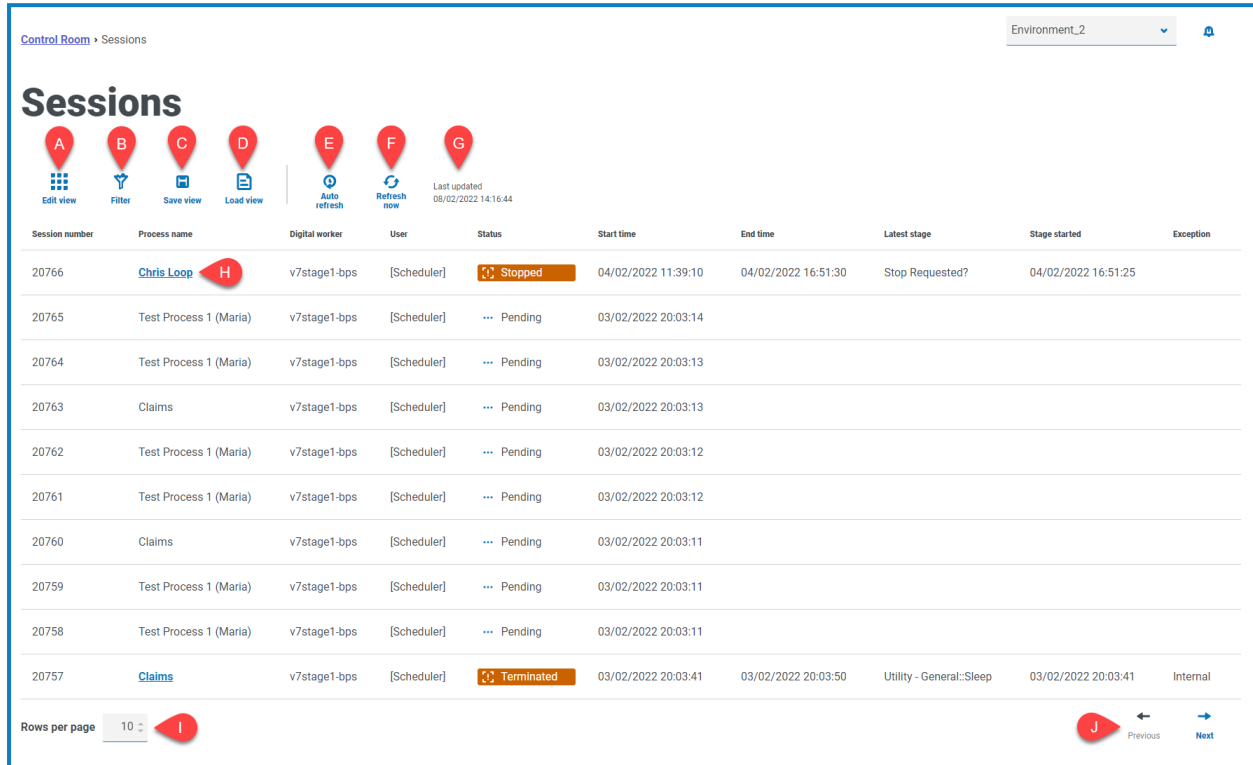


If uploading more than one image file when configuring a session's start-up parameters, the collective size of all images must be under 3 MB. If this limit is exceeded, form validation errors display when attempting to save changes.

5. Click **Save**.

Sessions

The Sessions page provides you with a summary of all the [sessions](#) for your connected environments. This provides you with an alternative view of the sessions that you can view in the Blue Prism interactive client Control Room.



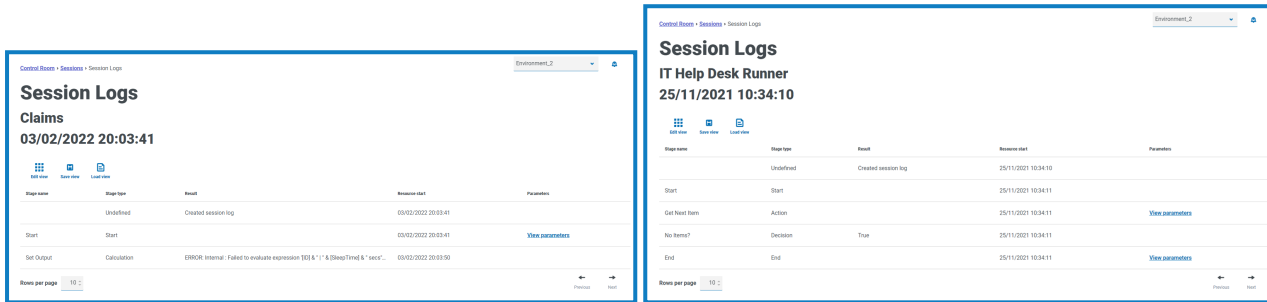
The Sessions page provides you with the following information and functions:

- A. **Edit view** – Define the columns that are displayed. You can then show or hide the columns using the toggle switches. You can also change the grid to display in a compact format.
- B. **Filter** – Filter the information that is displayed. You can turn on the [required filters](#) and enter or select the appropriate information for display, for example, you could turn on the **Status** filter and select **Terminated**.
- C. **Save view** – Save your current column view. You can enter a name for your view to make it easily identifiable when loading views. This allows you to create views of information which you can quickly access and reapply using **Load view**.
- D. **Load view** – Load a saved view. You can select the required view and click **Apply**.
- E. **Auto refresh** – Define how often the table contents will automatically refresh. By default it is disabled, but can be set to every minute, five minutes, 10 minutes, or 30 minutes.
- F. **Refresh now** – Refresh the table contents. If operating with auto refresh configured, using this option will reset the timer.
- G. **Last updated** – The date and time the table data was last refreshed.
- H. **Process name** – For completed schedules, click on the name of a process to [view the log](#) for that session.
- I. **Rows per page** – Enter a number, or use the up and down arrows, to change the number of rows seen on a page.
- J. **Previous and Next** – Click **Previous** or **Next** to move through the pages of sessions.

View the session logs

1. On the Sessions page, click the name of the required process.
The Session Logs page displays with a history of the processes that have been run.
2. If available in the **Parameters** column, you can click **View Parameters** to see the information about the parameters in the process.

As an example, the images below show a log for a terminated session and for a completed session:



Use the filters on the Sessions page

The filters enable you to easily find sessions based on the selected criteria.

1. On the Sessions 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 session. You can apply multiple filters at the same time.

The available filters are:

Filter	Description
Session number	Enter the full or partial number for the session.
Process name	Enter the full or partial name of the process.
Digital worker	Enter the full or partial name of the digital worker.
User	Enter the user's username, or part of their username.
Status	<p>Select the status of the session from the following options:</p> <ul style="list-style-type: none"> • Pending – Displays sessions that are due to run. • Running – Displays sessions that are currently running. • Terminated – Displays sessions that have terminated and not completed. • Stopped – Displays sessions that have been stopped and are no longer running, but are not completed. • Completed – Displays sessions that have run successfully and completed. • Stopping – Displays sessions that are in the process of stopping. • Warning – Displays sessions that have warnings. <p>You can filter on more than one status at the same time.</p>

Filter	Description
Start time	Select the required time period that the start time falls within from the drop-down list. If you select A given range , enter the date range and times in the fields provided.
End time	Select the required time period that the end time falls within from the drop-down list. If you select A given range , enter the date range and times in the fields provided.
Latest stage	Enter the full or partial stage name.
Stage started	Select the required time period that the stage started within, for example, select Over 2 hours to filter against start times more than two hours ago.

The information on the Sessions page is immediately filtered displaying any matches that contain the text you have entered.



If you have set the filters but want to view the unfiltered information again, either click **Reset filters** in the panel, or 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.

Digital Worker Health

The Digital Worker Health page provides you with a summary of all the digital workers (also known as runtime resources) that are available for your connected environment.

Control Room > Digital Worker Health

Environment_2

Digital Worker Health

A Edit view
B Filter
C Save view
D Load view
E Auto refresh
F Refresh now
G Last updated 08/02/2022 15:40:15

Digital worker	Group name	Pool name	Status	Pending sessions	Active sessions
v7stage1-bps:8192	Default		Offline	0	0
v7stage1-bps:8191	Default		Offline	0	0
v7stage1-bps:8190	Default		Offline	0	0
v7stage1-bps:8189	Default		Offline	0	0
v7stage1-bps:8188	Default		Offline	0	0
v7stage1-bps:8187	Default		Offline	1	0
v7stage1-bps:8186	Default		Offline	3	0
v7stage1-bps:8185	Default		Offline	2	0
v7stage1-bps:8184	Default		Offline	0	0
v7stage1-bps:8183	Default		Offline	1	0

Rows per page 10 H Previous Next

The Digital Worker Health page provides you with the following information and functions:

- Edit view** – Define the columns that are displayed. You can then show or hide the columns using the toggle switches. You can also change the grid to display in a compact format.
- Filter** – Filter the information that is displayed. You can turn on the [required filters](#) and enter or select the appropriate information for display, for example, you could turn on the **Status** filter and select **Idle**. The filter is enabled by default to only show digital workers that are not retired.
- Save view** – Save your current column view. You can enter a name for your view to make it easily identifiable when loading views. This allows you to create views of information which you can quickly access and reapply using **Load view**.
- Load view** – Load a saved view. You can select the required view and click **Apply**.
- Auto refresh** – Define how often the table contents will automatically refresh. By default it is disabled, but can be set to every minute, five minutes, 10 minutes, or 30 minutes.
- Refresh now** – Refresh the table contents. If operating with auto refresh configured, using this option will reset the timer.
- Last updated** – The date and time the table data was last refreshed.
- Rows per page** – Enter a number, or use the up and down arrows, to change the number of rows seen on a page.
- Previous and Next** – Click **Previous** or **Next** to move through the pages of digital workers.

Use the filters on the Digital Worker Health page

The filters enable you to easily find audit events based on the selected criteria.

1. On the Digital Worker Health 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 digital worker. You can apply multiple filters at the same time.

The available filters are:

Filter	Description
Digital worker	Enter the full or partial name of the digital worker.
Group name	Enter the full or partial name of the group.
Pool name	Enter the full or partial name of the pool.
Retirement status	Select the status of the digital worker from the available options. The default configuration is to only display resources that are not retired.
Status	Select the status of the digital worker from the available options. You can select more than one status.
Pending sessions	Enter a numerical value for the minimum number of pending sessions that a digital worker has. Digital workers with this number of pending sessions or higher will display.
Active sessions	Enter a numerical value for the minimum number of active sessions that a digital worker has. Digital workers with this number of active sessions or higher will display.

The information on the Digital Worker Health page is immediately filtered displaying any matches that contain the text you have entered.



If you have set the filters but want to view the unfiltered information again, either click **Reset filters** in the panel, or 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.

Dashboard widgets

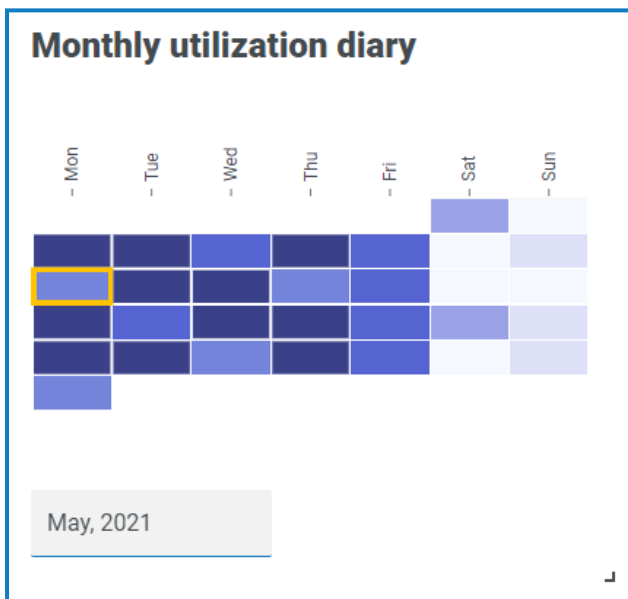
The Control Room plugin also provides a number of [dashboard widgets](#), which you can apply and customize to monitor your Blue Prism environment at a glance.


To customize your widgets:

1. On the Dashboard, click **Edit widgets**.
The widgets that can be customized display an **Options** icon; all widgets display a **Remove** icon.
2. Click **Options** next to the required plugin.
The Display options panel displays.
3. Set the options as required and click **Close drawer**.
The widgets update as soon as the options are selected and the Display options panel closes.

Monthly utilization diary

This enables you to view the level of use of your digital workforce for each day of a month. You can hover over a block in this chart to view the utilization level. An example of the Monthly utilization diary widget is shown below:



 The darkest color indicates the highest level of use, the lightest color is the lowest level.

Utilization chart

This displays how much the selected digital workers are used as a line graph against the hours for a given date.

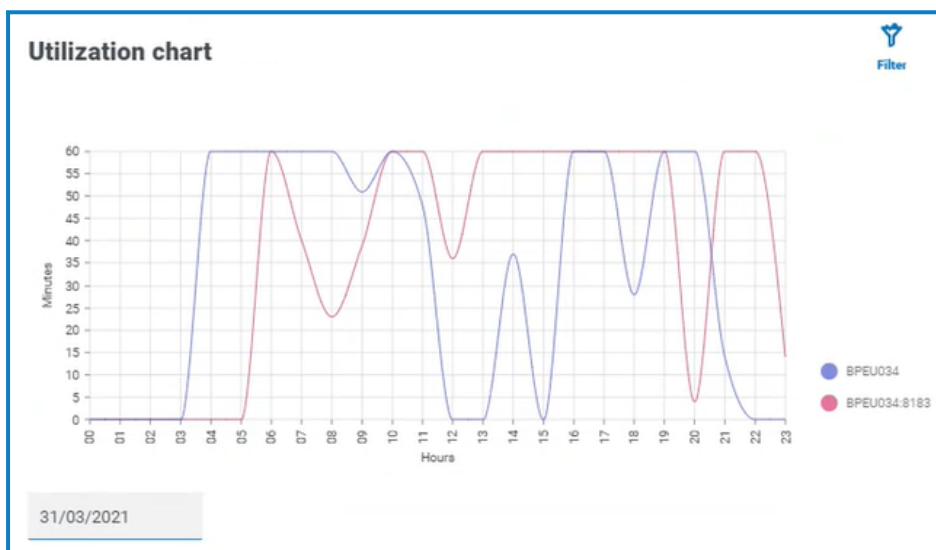
To configure the widget:

1. On the Utilization chart widget, click **Filter**.

The Filter panel displays.

2. Under the **Select digital workers** filter, enter the digital worker name or select one from the drop-down list. You can have more than one digital worker set for this widget.

For example (with the options set to activity and minutes):



3. Click **Close drawer** to close the Filter panel.
4. If you want to view the information for a different day, enter the date in the date field and press Enter.
5. If required, use the [options](#) to customize this display further.

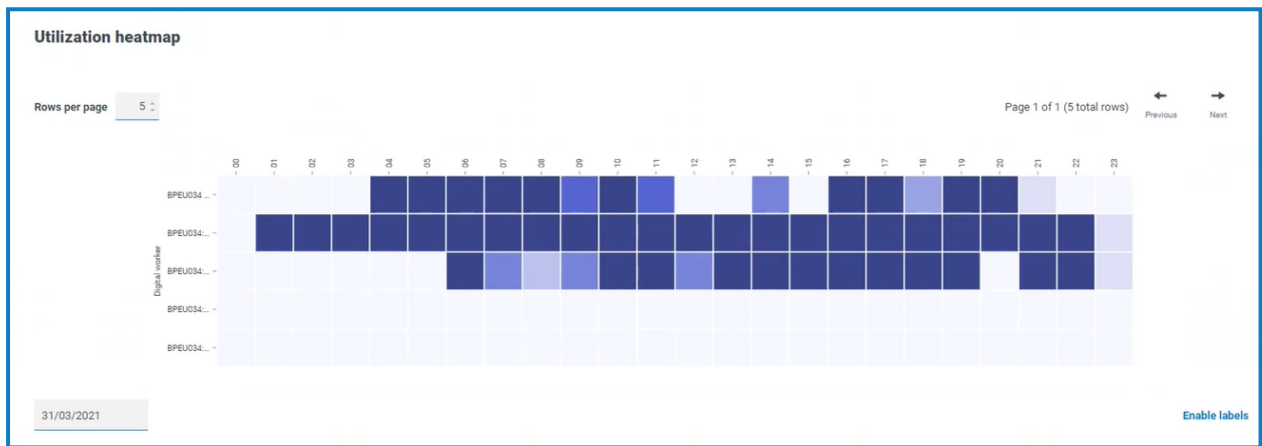
Utilization heatmap


This displays a list of digital workers and the hours that they were utilized for a given date. By default, it will show you the data for the current date.

To configure the widget:

1. On the Utilization heatmap widget, click **Enable labels** to view a numerical value within each of the colored squares. You can click **Disable labels** to remove these values.
2. If you want to view the information for a different day, enter the date in the date field and press Enter.

The Utilization heatmap updates. For example (with the options set to activity and minutes):



 The darkest color indicates the highest level of use, the lightest color is the lowest level.

3. If required, use the [options](#) to customize this display further.

Work queue compositions

This enables you to view the composition of work queue items across your work queues. When you add the widget, it will not display any data.

To configure the widget to point at a specific work queue:

1. On the Work queue compositions widget, click **Filter**.
The Filter panel displays.
2. Under the **Select queue** filter, enter the queue name or select one from the drop-down list.
3. Click **Close drawer** to close the Filter panel.

The widget displays the information for the work queue that you want to monitor. For example:

