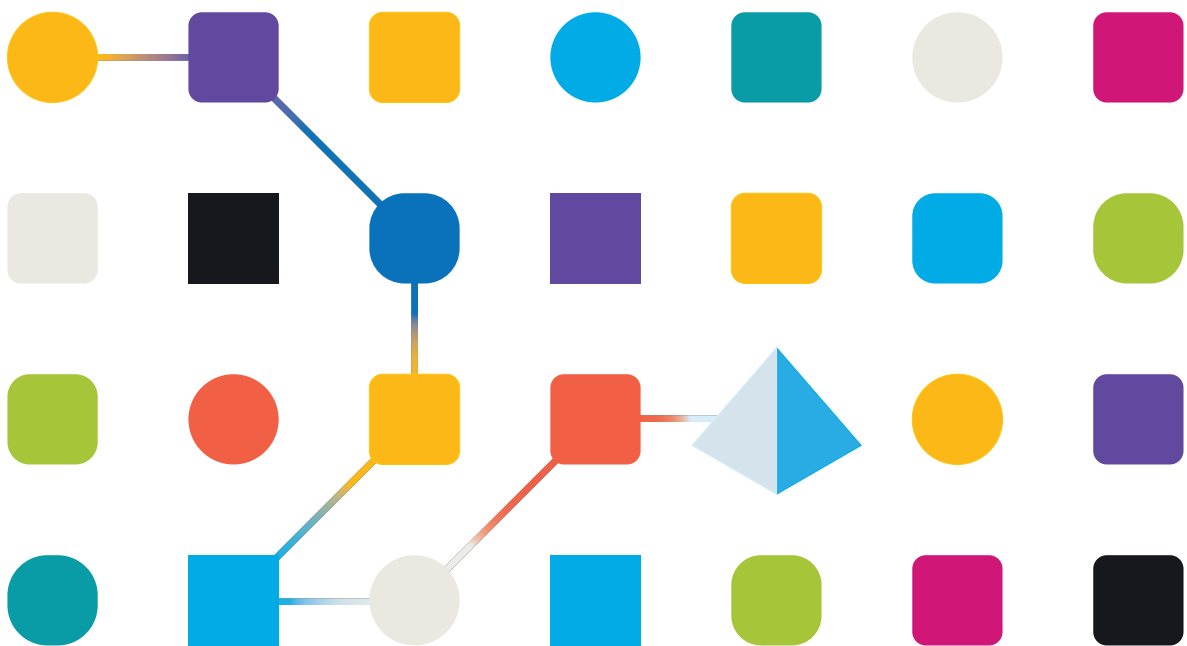




Interact 5.0 Plugin User Guide

Document Revision: 2.0



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.

© 2023 Blue Prism Limited

“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

Interact plugin	5
Supported web browsers on client machines	5
Who is this guide for?	5
About Interact	5
Getting started with the Interact plugin	6
Log into Hub	6
Open the Interact plugin	7
Creating Interact forms	8
Add a form	9
Add pages to a form	11
Add fields to a form	14
Add rules to a form	18
Save the form	20
Managing forms	21
Version control	21
Import a form	23
Test a form	23
Key field	24
Edit a form	26
Delete a form	26
Notifications	26
Search options	26
Deploying forms	29
Add a role to the form	29
Add a form to a role	29
Using the capture types in forms	31
Text	31
Text area	35
Number	38
Date	41
Time	44
Upload	46
Paragraph	48
Horizontal rule	50
Dropdown	51
Radio group	55
Checkbox group	57
Table	60
Using regular expressions	62
Example: National Insurance Number	63
Example Social Security Number	64

Example: UK mobile number	65
Using rules	66
Rules Examples	66
Rules Logic	70
Interact restrictions	72
Number of elements	72
Custom icons for forms	72
Form field restrictions	72
Customizing Interact branding	73
Apply a theme to users	73
Edit and save a theme	74
Delete a theme	74
Set a new default theme	74
Change the theme	74
Create a new theme	75
Troubleshooting	76
I have made changes to a form, but the users cannot see the changes in Interact	76
The owner of the form no longer exists in the system, what happens to the form?	76

Interact plugin

SS&C | Blue Prism® Interact consists of two key components:

- The Interact web-based application used to enter information into forms, and submit or approve requests.
- The Interact plugin within SS&C | Blue Prism® Hub. This includes the Forms plugin feature which is used to design and configure the forms that are seen within the Interact web-based application.


This guide outlines the functionality and usage of the Interact plugin available in Hub. For information on the Interact web-based application, see the [Interact user guide](#).

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

Supported web browsers on client machines

The latest versions of the following web browsers are supported by Hub:

- Google Chrome
- Microsoft Edge (Chromium-based)

 Microsoft Internet Explorer and Mozilla Firefox are not supported.

Who is this guide for?


This guide is intended to be used by the RPA developers who are responsible for creating Forms and publishing them for end users to utilize. This guide assumes familiarity with 'if-then' statement structures and regular expressions, and that the user is familiar with Blue Prism Digital Workforce and has experience with related components such as Hub and Blue Prism.

About Interact

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

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

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

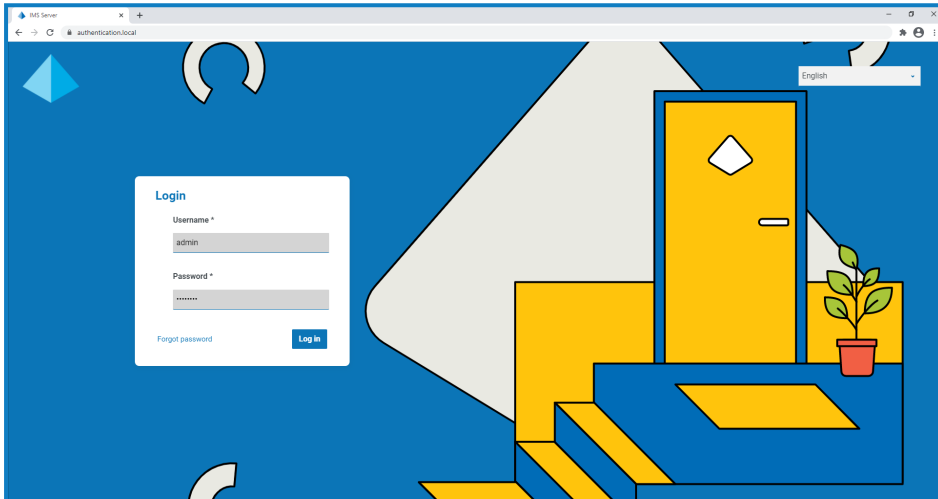
 JavaScript must be enabled in your internet browser to use the full functionality of Interact.

Getting started with the Interact plugin

Your system administrator will create an account for you to use to access Hub and Interact. When your account has been created, you will receive an email with details of your account and access information. You should follow the instructions in the email to log in for the first time.


Log into Hub

1. Launch a browser and go to the Authentication Server website. Your system administrator will provide you with the website address. Our example shows <https://authentication.local>

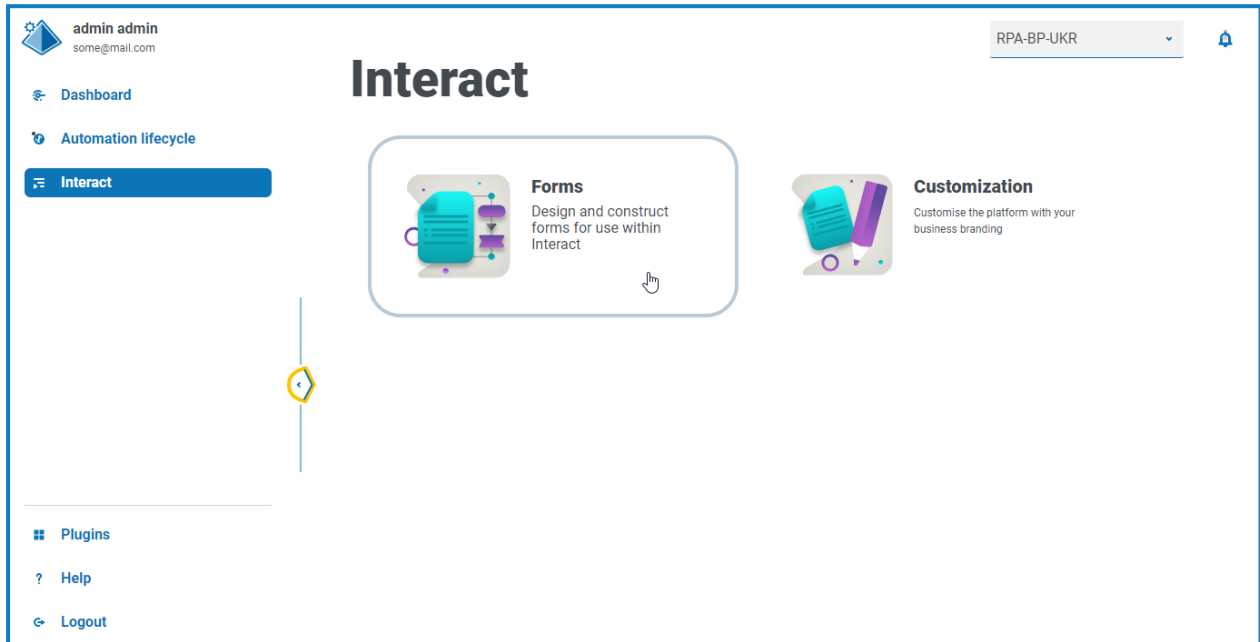


2. Enter your credentials and click **Log in**.
3. Click **Hub** to launch the Hub website.

Open the Interact plugin

 To use the Interact plugin, a SS&C | Blue Prism® Hub administrator needs to provide you with access. For more information, see [Configure the Interact plugin](#).

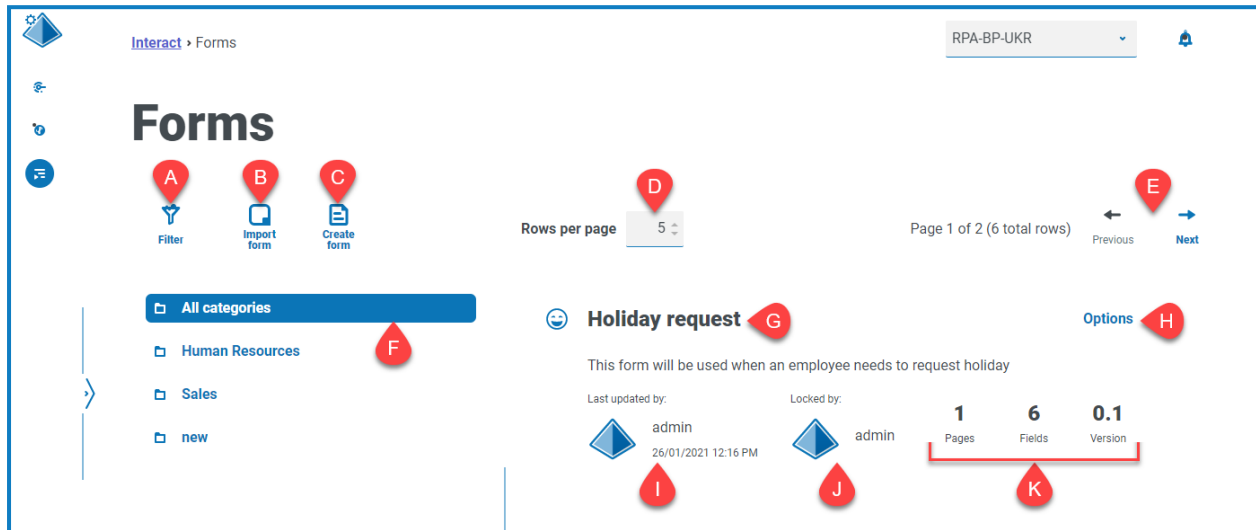
1. Click **Interact** on the sidebar menu to open the Interact plugin.



2. Click the required component tile to open it:
 - **Forms** – Enables you to create and deploy forms to the Interact web application.
 - **Customization** – Enables you to create and update themes that control the branding of the Interact web application. Any changes will be instantly applied to the users who are assigned the theme. This component is only available to users with Hub administrator access.


Creating Interact forms

When you open Forms in the Interact plugin, the Forms page displays. You can select a specific category folder, or the **All categories** folder, to view any forms that have been created. Only forms where you are named as a member display; you cannot see forms created by other users if you are not a member. The forms display in descending date order, starting with the most recently updated.



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

- A. **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 **Updated by** filter and enter a specific user.

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

Add a form

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

The Create form page displays.


2. Complete the following mandatory fields to define the overall details of a form:

- **Business process** – The business process that the form relates to. The business process name must be unique.
- **Name** – The name of the form.
- **Description** – A description for the form.
- **Delivery method** – The way the form will be delivered. Select **Queue**, **Email**, or both if required.

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


- **Environment** – The environment that the submitted request will be made into.
- **Queue name** – The queue in the selected environment that will be used to load the submission. The drop-down list displays the 10 most recently used queues. If you cannot see the queue you want, start typing the name in the field to filter the list.
- **Priority** – This is an optional field. However, if a value is entered in **SLA**, a priority is required. The business priority for the submitted form. This can be any value between 1 to 999 with 1 being the highest priority.

- **SLA** – This is an optional field. However, if a value is entered in **Priority**, an SLA is required. The business Service Level Agreement (SLA) timeframe in which the submitted request should be processed within. The definition is ddd.hh:mm:ss and the range is from 000.00:00:01 to 999.23:59:59.

 Blue Prism Director uses the Priority and SLA to prioritize the order of items in the work queue in Blue Prism. When a digital worker is available to execute a process, Director identifies the next best item based on these values.


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

- **Interact role** – The role to which this form will be available. Anyone who is a member of this role will be able to access the form in the [Interact web application](#). The role must exist in Blue Prism Hub to be able to assign a form to it. If you need a new role, contact your Hub administrator. You can select more than one role.

 If you select a role while creating a new form, the form will be published to the Interact website as soon as it is saved for the first time and the version number changes from 0.0.

It is advisable to leave this field blank whilst creating the form. Once the form is finalized, you can edit the form details and complete this field to publish the form. For more information, see [Deploying forms on page 29](#).

- **Form members** – Users (such as form designers) who can view and edit this form in the Interact plugin. If you are creating the form, you are automatically added. You can add more users, or you can leave it as just yourself and add more people by editing the basic information for the form after creating it. The drop-down list displays all Hub users – you can type in the field to filter this list.
- **Default approval type** – Allows the submission to be sent to another user for approval before it is sent for processing. By default, this is set to **None**, meaning the submission is not sent for approval. If you select:
 - **Select approver(s)**, the **Approver(s)** field displays for you to enter one or more users who can approve any requests from the form before final submission. The form will only require one of these users to approve the form.

 The users you select must have Interact Approver privileges. You should consult with your Hub administrator to ensure the users have the required level of permissions.

- **Any approver**, anyone who is a member of the role will be able to approve any requests from the form before final submission.

If an approval type is selected, the **Exclude submitter** check box displays. By default, this is selected, so the person who submits the form is automatically excluded as an approver on the form. Therefore, if the form is submitted to the members of a role, and the submitter was a member, they would not be able to approve their own form. If required, you can clear this check box to enable submitters to approve their own forms in Interact.

- **Category** – Allows forms to be grouped together in a defined category to determine who can access the form. For example, you may have categories for Finance, HR and Sales so you can allow specific users access only to the forms in the category that they need to do their role. Categories are defined by entering the name of the category. Once entered, a category will be available from the drop-down list.
- **Icon** – Select the image that will appear with the form in Interact to allow easy identification. You can choose one of the preloaded icons by selecting **Preset icons**, these are defined into categories: Application, Banking, Data, Education, Emotion, Food, Gadgets, Medical, Network and Security, Science and Technology, Transportation, and User Interface. Alternatively, you can load your own icon by selecting **Upload** and browsing to your icon. Icons must be a PNG, JPG or SVG file, no bigger than 256 x 266 px and 30KB in size.


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

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

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

Add pages to a form

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

 It is recommended that the maximum number of pages in a form is 10, with a maximum of 30 fields per page. Above this, the time to render increases.

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

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

2. Click **Create page**.

The Create page panel displays.

Create page Close drawer

Name *

Description

B / *I* / U / / **A**

500 Characters remaining

Hidden

Create another

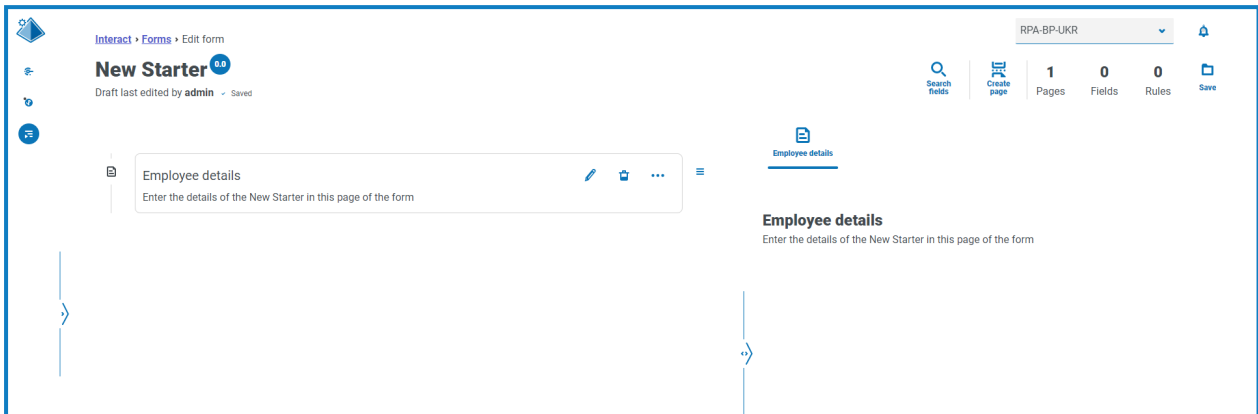
Save

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

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


6. Click **Save**.

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



The elements that make up your form are shown in the area directly below the form title. The area to the right is the testing area – this displays your form as users will see it in Interact, enabling you to test the fields that you have added.

Add fields to a form

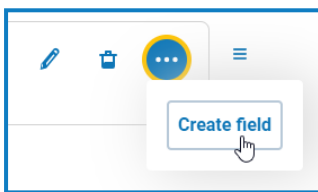
 It is recommended that the maximum number of fields on a page is:

- 40 fields on a single page form.
- 30 fields on a multiple page form.

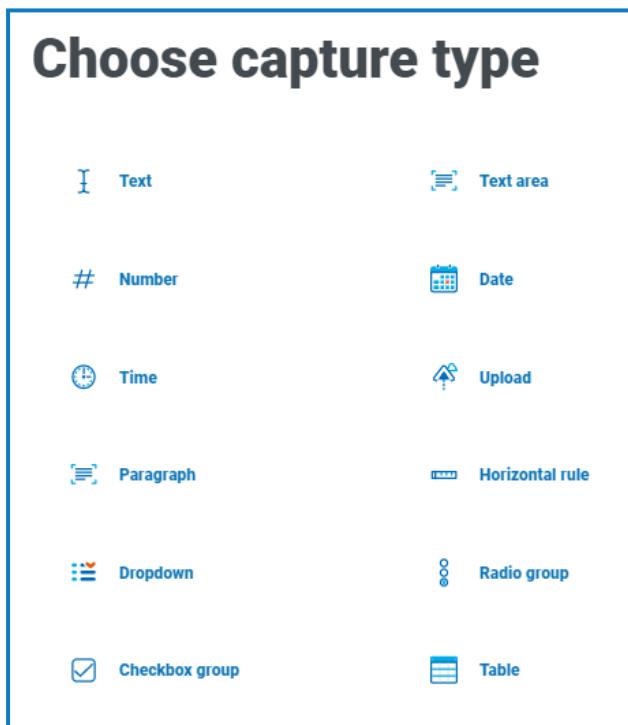
Above this, the time to render increases.

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

1. On the Interact Forms page, click **Options** next to the required form and click **Edit form**.
The Edit form page displays.
2. Click the ellipsis icon for the appropriate page and click **Create field**.



The Choose capture type dialog displays.



3. Select the required capture type:

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

These all create input fields within your form, with the exception of the Horizontal Rule. The Horizontal Rule is purely a visual element. For more information on these types, see [Using the capture types in forms on page 31](#).

The Create page displays for the field type you have selected.



If you want to use a different field type, click **Change type** on the Create page.

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

- **Initial State** – The state that the field is set to when a user first accesses the form:
 - **Optional** – It does not matter whether a user completes the field or not.
 - **Mandatory** – Must be completed by the user before the form can be submitted.
 - **Read-Only** – The field cannot be edited. This is typically used as an input from an automation where the information has been retrieved and updated so the user can review.
 - **Hidden** – The field has [rules](#) applied so that it only appears when a predetermined condition is met.
- **Label** – This is the text that will appear alongside the field in the form. This should be a friendly name so a user can understand what they should be entering into the field. Labels are restricted to 50 characters.
- **Automation ID** – This is the name that ties to the data item within the automation. This field has a restricted format, it can only be lowercase letters and no spaces or special characters are allowed. A hyphen, '-', is allowed to represent a space. When a Label is applied an Automation ID is automatically generated using the formatting restrictions, this is only a suggestion and can be changed if required. The automation identifier is restricted to 50 characters.
- **Description** – Although this is not a mandatory field it provides the 'help text' alongside the field in the form. The descriptions for all fields are restricted to 150 characters.

5. Optionally, if the data that is entered is likely to be of a sensitive nature, you can select one or both of the following:
 - **Mask data on entry** – If this option is selected, the information entered displays as dots on the screen as the Interact user types into the field.
 - **Purge data on submission** – If this option is selected, any data entered in this field by the Interact user will be removed when the form is submitted and will not be stored in the Interact database. The data is only stored in the Blue Prism database, and any additional storage destinations configured as part of the automation process for the form.




These options are only available for [Text fields](#). Therefore, if you want to submit a number and redact the content, use a Text field for the input rather than a Number field.

6. If applicable, select the type of regular expression you want to use:
 - **Simple** – This enables you to put simple restrictions on the field entry, such as limit the length of the entry, specify allowed characters and prohibited characters, and set an initial value. For more information, see [Using the capture types in forms on page 31](#).
 - **Regex** – This enables you to define more complex restrictions such as if you want the data in the field to conform to a specific structure, like a post code or identification number. For more information on regular expressions, see [Using regular expressions on page 62](#).

7. Click **Create field**.

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

The screenshot displays the Interact Forms editor interface. On the left, the form is being edited, showing a title 'New Starter' and a description 'Enter the details of the New Starter in this page of the form'. Below this, there are three text input fields: 'Employee details', 'First name', and 'Last name'. The 'First name' and 'Last name' fields have a 'Mandatory' label at the bottom right. A 'Submitter' field is highlighted with a red dashed border. On the right, a preview of the form is shown, displaying the same fields and labels. The top right corner of the editor shows a navigation menu with options like 'Search fields', 'Create page', 'Collapse all', 'Expand all', and a summary of '1 Pages', '2 Fields', and '0 Rules'. The top left corner shows the 'Interact Forms' breadcrumb and the form title 'New Starter'.

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

You can select one field to be identified as the key field by clicking the ellipsis icon and selecting **Make key field**. Once selected, a key icon appears along the bottom of the field tile. Key fields can then be used within Interact submissions as a filter to look for particular text. For more information, see [Key field on page 24](#).




Only a Text or Number field type can be selected to be a key field.



If a Text field has been set to use **Mask data on entry** or **Purge data on submission**, do not set it as the key field as this could expose the data entered in the field.

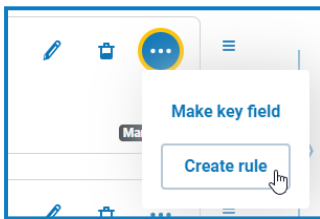
Add rules to a form

Rules enable you to control the form and activate different fields or pages depending on whether specified conditions are met. Using the testing area, rules can be tested prior to releasing the form for normal user usage. For more information on rules, see [Using rules on page 66](#).

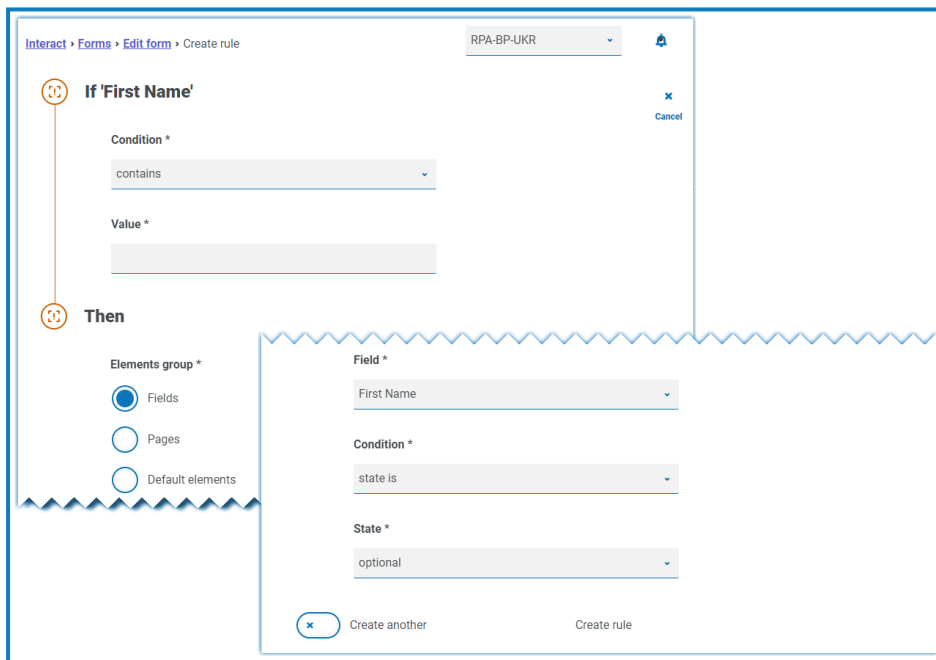
 The inbuilt rule which is enforced in the Interact user interface, where you cannot move to a new page if there are mandatory fields that need to be completed on the current page, does not apply in the testing area.

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

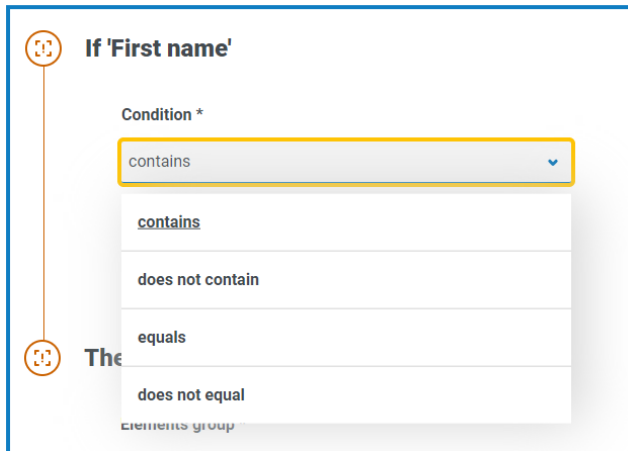
1. On the Interact Forms page, click **Options** next to the required form and click **Edit form**.
The Edit form page displays.
2. Click the ellipsis icon for the appropriate field and click **Create rule**.



The Create rule page displays.



Rules are created based on typical 'If Then' statements, so if a specific condition is met, then a defined action is performed. The If condition is dependent on the field you have selected and the name of the field is shown next to If on the page. The options for the rules will vary depending on the specific field type. For example, for a text field, the conditions for the If are:



3. Configure the If statement:

- a. **Condition** – Select the validation to perform on the field, for example:
- contains
 - does not contain
 - equals
 - does not equal

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

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

4. Configure the Then statement:

- a. **Element group** – Select the required option. This defines the level at which the result of the rule is applied, for example, whether it affects a particular field, page or the default elements. The following fields will change depending on your selection.
- b. **Field, Page or Default element** – Select the object that is impacted by the If statement being true.
- c. **Condition** – Select the action to take on the Then clause, for example, set value to, state is, and so on. The options that are available depend on the option you selected under **Element group**.
- d. **State or Value** – Enter the new value or select the state of the object in the Then statement, for example, the state could be set to hidden or visible.

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

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

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

The screenshot shows the 'Interact > Forms > Edit form' interface for a form titled 'New Starter' (version 0.4). The form is currently a draft, last edited by 'admin'. The main workspace is divided into two panels. The left panel shows the form structure with three main sections: 'Employee details' (with a sub-description 'Enter the details of the New Starter in this Page of the Form'), 'First Name' (a mandatory text field), and 'Last Name' (a mandatory text field). A 'Rule' is associated with the 'Last Name' field, with the text: 'If First Name contains Zachary then Last Name set value to Smith'. The right panel shows a preview of the form, including the 'Employee details' section, the 'First Name' and 'Last Name' fields, and a 'Region based in' section with radio buttons for 'EMEA', 'APAC', and 'US'. The top right of the interface includes a search bar, 'Create page', 'Collapse all', 'Expand all', and summary statistics: 1 Page, 8 Fields, 4 Rules, and a 'Save' button.

Save the form

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

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

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


The Edit form page displays.

2. Click **Save**.

The Increase minor panel displays.

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


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

 If you have assigned the form to an Interact role, it will now be available to the members of that role through the Interact web application.

Managing forms

Version control

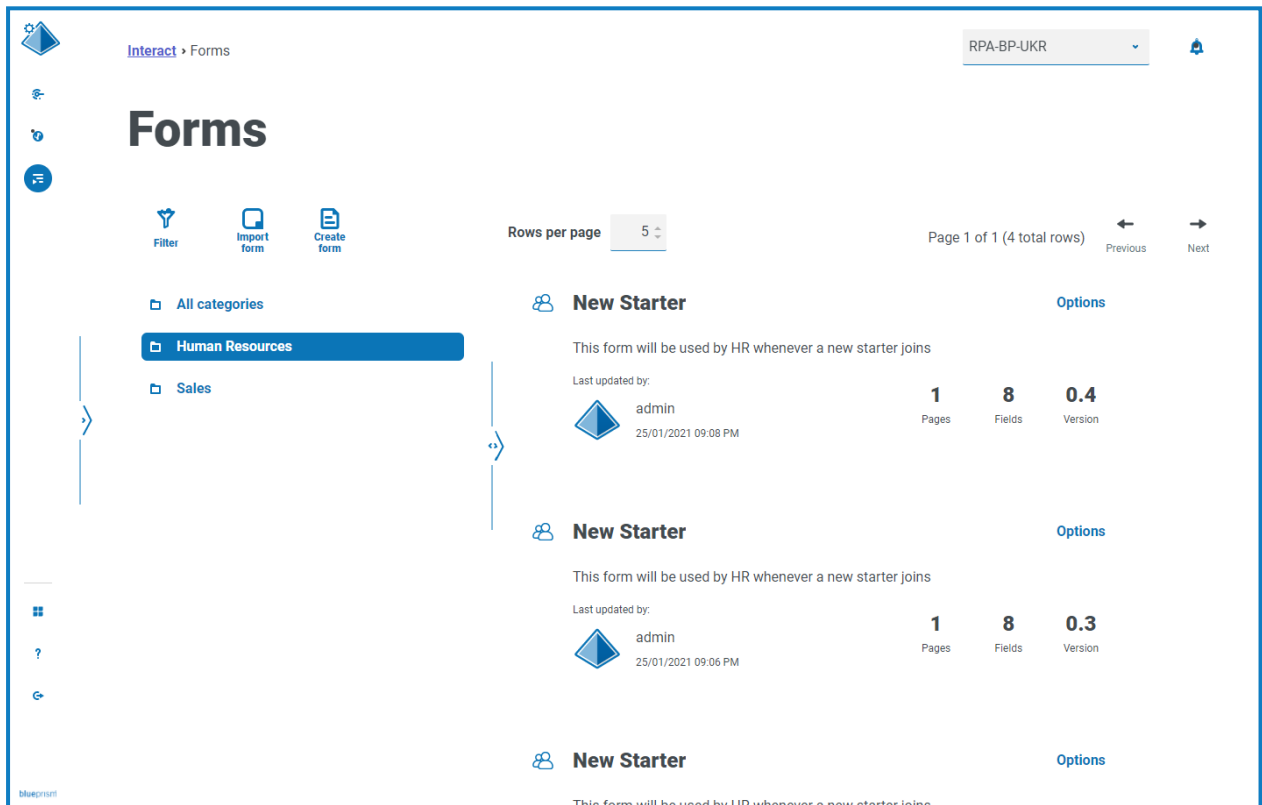
Forms are subject to version control to assist during development. Each time a form is saved, the minor version is incremented and annotated with the entered description for ease of identification.

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

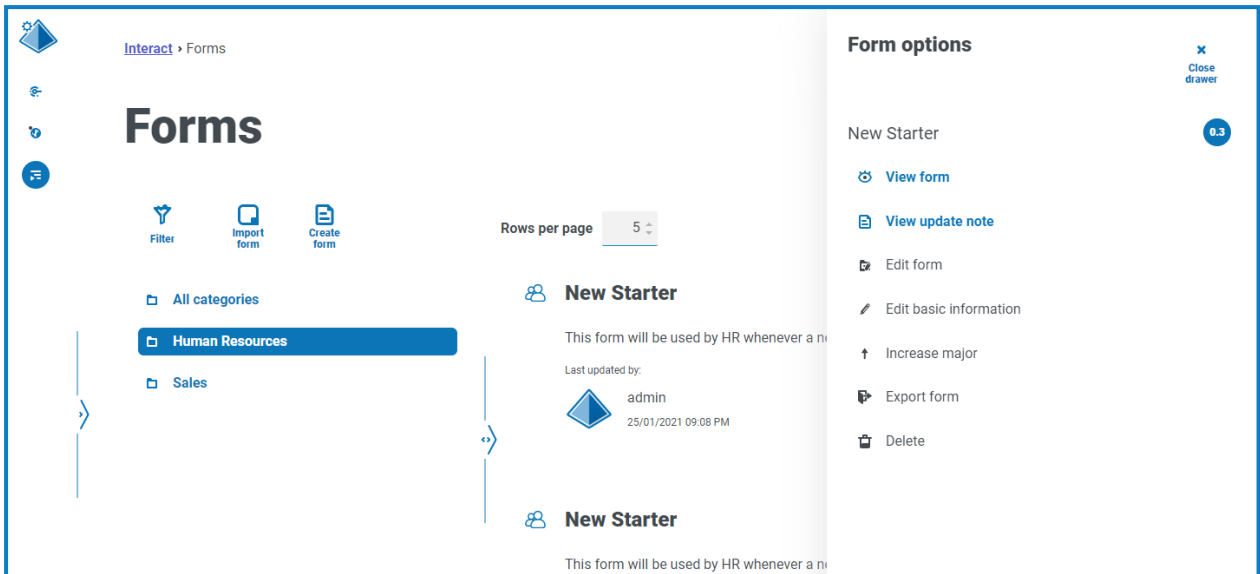
To view all the minor versions of a form:

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

All versions display.

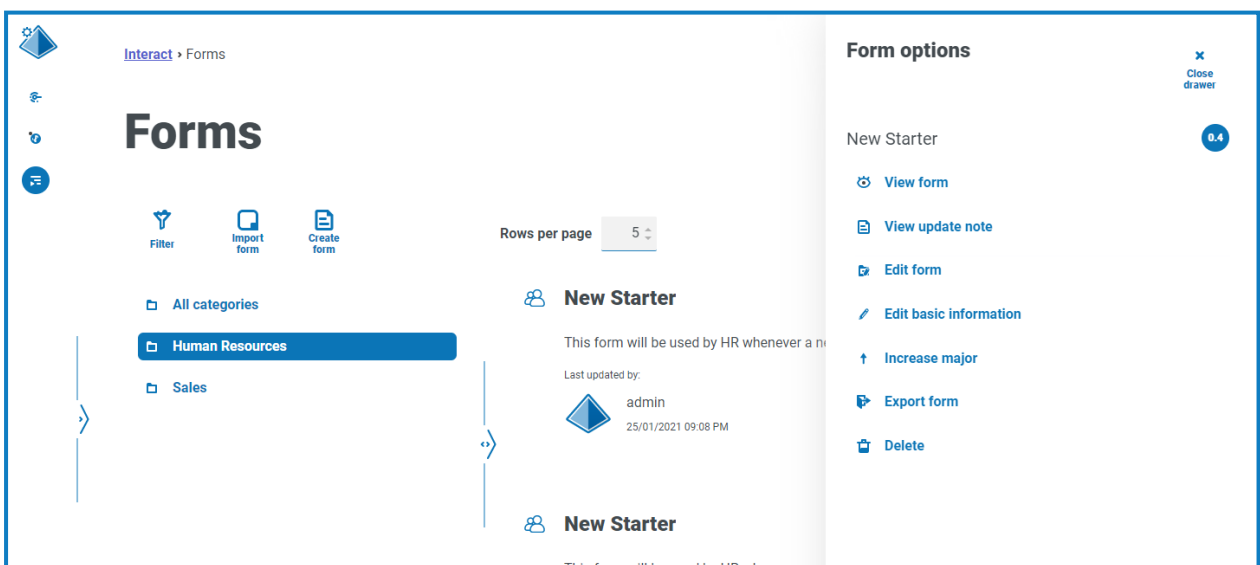


- If required, click **Options** on an earlier version of the form. From here you can select either to view the form or view the update note.



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

- **View form** – Displays the form and enables you to use the testing area, but you cannot edit or make changes to the form.
- **View update note** – Displays the associated update note.
- **Edit form** – Allows you to continue editing the form.
- **Edit basic information** – Allows the basic details associated with the form to be updated. These are the details that are entered when a form is initially created.
- **Increase major** – Increases the form version to a major version.
- **Export form** – Exports the form in a BPFORM file format for importing into another system.
- **Delete** – Deletes the latest version of the form, reverting back to the previous version. You can also delete the original version of the form.



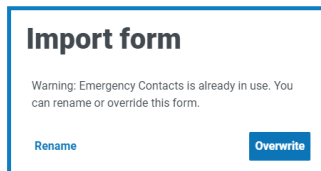
Import a form

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

1. On the Interact Forms page, click **Import form**.
2. Navigate to, and select, the required exported form.

If the form:

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



- Doesn't already exist, the Import form page displays.
3. If required, select one of the following options:
 - **Overwrite** – The Import form page displays. This has the same fields as [Edit form page](#) where a business process, description, delivery method, default approval type, update note, category, and icon can be added.
 - **Rename** – The Import Form page displays. You must enter a business process to which the form will be assigned, and enter a new name for the form.
 4. Click **Import form** to complete the import.

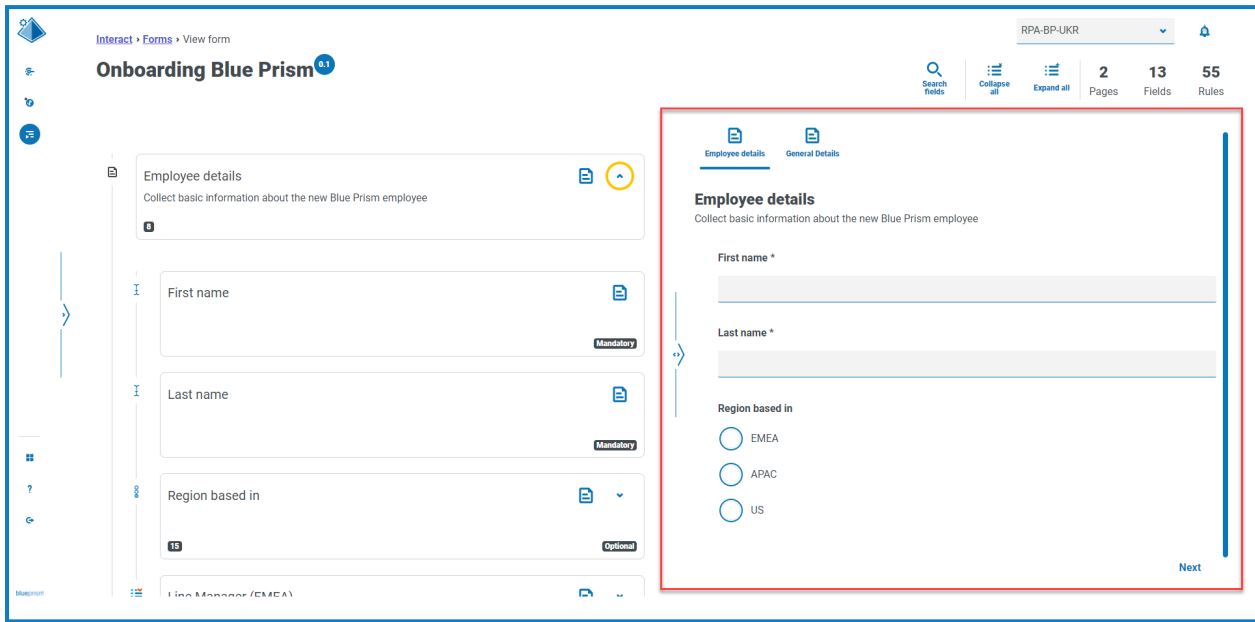
Test a form

The right-hand area of the View form or Edit form pages is the testing area. This area enables you to view the form as it will display to Interact users, and allows you to verify that any rules or field restrictions work as required.

To test a form:

1. On the Interact Forms page, click **Options** for the required form, and then click either **View form** or **Edit form**.
2. Enter information into the fields to test them.

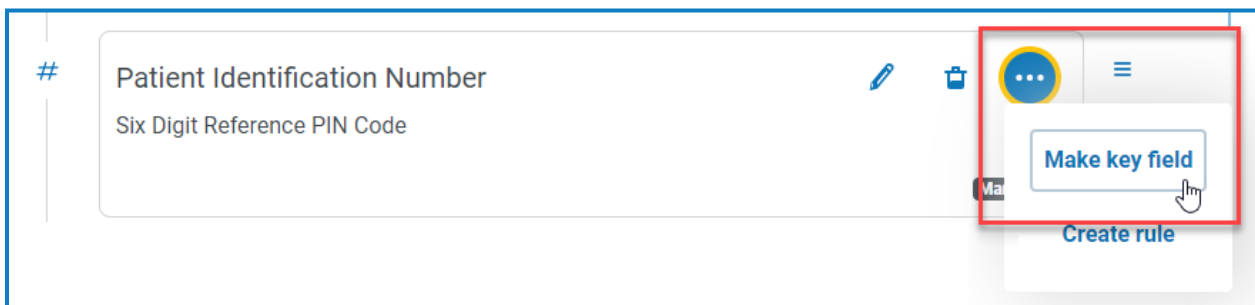
The example below shows the testing area for a multi-page form when viewing a form.



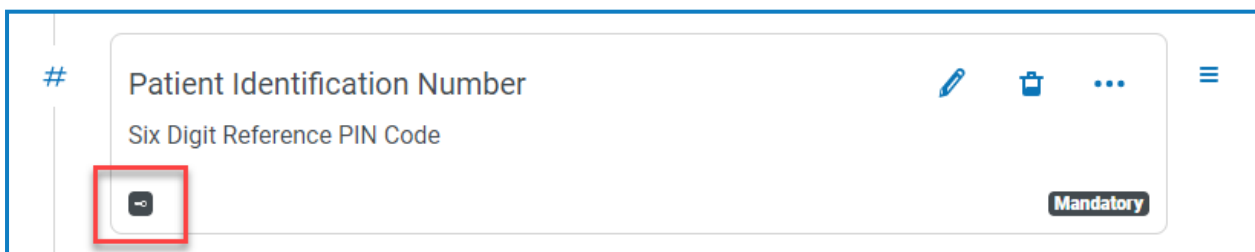
Key field

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

When creating your form, you can select one field to be identified as the key field by clicking the ellipsis icon and selecting **Make key field**. This option is only available for fields that are a Text field type or a Number field type. Once selected, a key will appear along the bottom of the field tile in the form, for example:

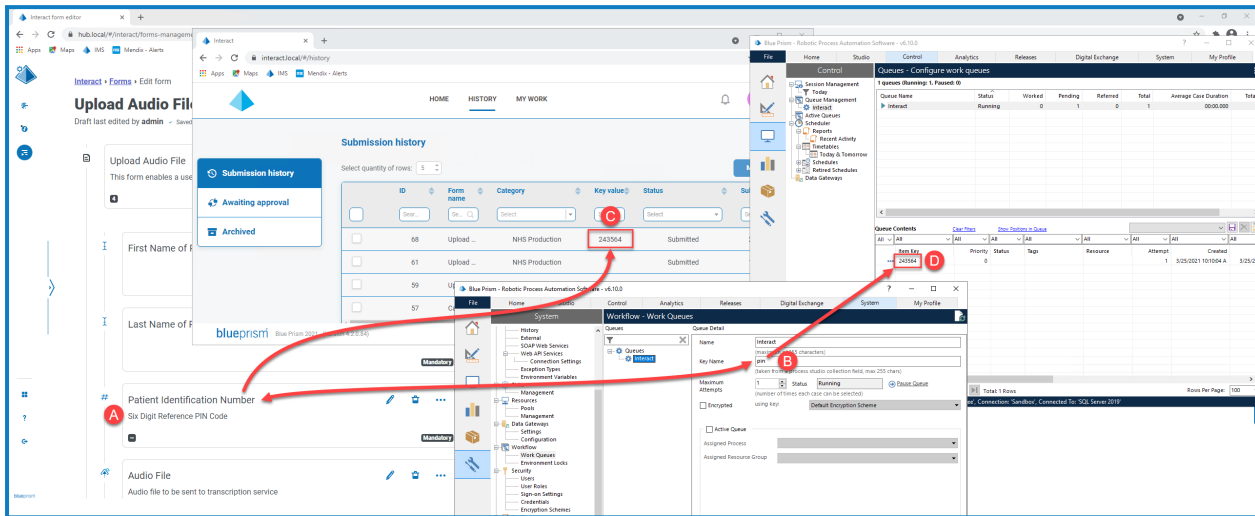


becomes



You can reassign the key field by selecting **Make key field** on a different field. You can also remove the key from the field by clicking the ellipsis icon and selecting **Unkey**.

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



This example shows that:

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

Initial state *

Mandatory

Label *

Patient Identification Number

Automation ID *

pin

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

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

⚠ If a Text field has been set to use **Mask data on entry** or **Purge data on submission**, do not set it as the key field as this could expose the data entered in the field.

Edit a form

You can edit the layout and contents of an existing form by selecting **Edit form** from the **Options** for the required form. You can add or edit fields and rules as required. For more information, see [Creating Interact forms on page 8](#).

If you want to edit the form's name and description, delivery method, access, and approval settings, you need to select **Edit basic information** from the **Options** for the required form. You cannot change the business process. For more information on these fields, see [Add a form on page 9](#).

Delete a form

You can permanently delete any version of an Interact form, for example, you might want to delete version 0.4 of a form to revert to the structure it was using in version 0.3, or you might want to delete obsolete forms entirely. You cannot delete a form that is locked.

 If you delete a form, it is permanently deleted. You cannot restore a deleted form.

To delete an Interact form:

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

A message displays asking you to confirm that you want to delete that version.

2. Click **Yes**.

If you have selected:

- Version 0.1 or 0.0 of a form, it is completely deleted.
- Version 0.2 or higher of a form, that version is deleted and the form is reverted to the earlier version.

3. If required, repeat steps 1 and 2 until you have completely deleted the form.

Notifications

If you are a member of a form, you will receive notifications when a form needs an action on it, or when there is a significant change to the form made by another member, such as a change to the major version number or the deletion of a version. If there are new notifications, the bell icon is annotated with the number of notifications. 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.

Search options



Interact Forms enables you to search for:

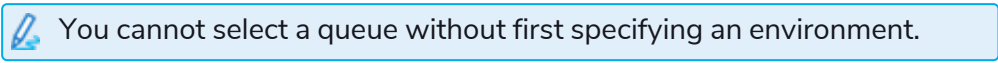
- **Forms** – Using the filters.
- **Fields** – Using the **Search fields** icon.

Search for a form


1. On the Interact Forms 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 form. You can apply multiple filters at the same time.

The available filters are:

Filter	Description
Form name	Enter the full or partial name of the form.
Process name	Enter the full or partial name of the business process that the form is associated with.
Version	<p>Enter the version number of the form you want to find.</p> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;">  If this is not the latest version of the form but an earlier version, you will need to turn off the Latest filter to view it. </div>
Latest	<p>Select whether you want to see the latest version of the form or earlier versions; the options are:</p> <ul style="list-style-type: none"> • Yes – Displays only the latest version of the form. This is the default setting. • No – Displays only the earlier versions of the form and not the latest version. <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;">  By default, the Latest filter is already turned on. You can turn this off if you want to view all versions of the forms. </div>
Updated by	Enter the user's username, or part of their username.
Updated date	<p>Enter a date range:</p> <ul style="list-style-type: none"> • In the first field, select the earliest date. • In the second field, select the latest date. • 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. <p>This displays any forms that have been updated during this time frame.</p>
Imported	<p>Select one of the following options:</p> <ul style="list-style-type: none"> • Yes – Displays only the forms that have been imported and not edited. If a form has been imported and the minor or major version of the form has been changed, it is no longer classed as an imported form and will not display. • No – Displays all other forms and not the imported forms.
Imported file	Enter the full or partial name of the file.
Description	Enter a term or word to search against the text in the Form description.
Delivery method	<p>Select the delivery method from the drop-down list; the options are:</p> <ul style="list-style-type: none"> • Queue – Displays the forms that have been set to use a Blue Prism work queue. • Email – Displays the forms that have been set to use email as the delivery method.

Filter	Description
Queue name	Select the environment from the drop-down list and then select the queue. You can also type into the fields to filter the results in the list. 
Email address	Enter the email address that is used as the delivery method, or part of the email address.
Approval	Select one of the following options: <ul style="list-style-type: none"> • Yes – Displays only the forms that have been designated as needing approval (the Default approval type field on the form has been set to a value other than None). • No – Displays all the forms that do not need approval.
Approved by	Enter the user's username, or part of their username. You can select more than one user.
Locked by	Enter the user's username, or part of their username. You can select more than one user.
Interact roles	Enter the name of an Interact role, or part of the role name, and select the required role from the drop-down list.

The list of forms is immediately filtered, displaying any matches that contain the text and criteria configured in the filters.

 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.

Search for a field

1. On the Edit form or View form pages, click **Search fields**.
The Search field panel displays.
2. Enter some text that will help you to find the field you require. You can enter:
 - The field type, for example, text for text fields, or radio for radio buttons.
 - The name of the field.
 - Some other text which may match part of the field description.

The text is searched against the type of field, the field name and the description.


As you type, the results are shown in a list below the search field. The more characters you enter, the more the list is refined.

3. Click on the required field in the list to jump to the field in the form.

Deploying forms

Once a form has been created for use in the Interact user interface, the form must be assigned to a role to make it available to the required users. There are two ways this can be done:

- **By setting the role in the basic information of the form** – This can be done by anyone who can edit the form.
- **By adding the form directly to the role** – This can only be done by Hub administrators.

 If the form still has a version number of 0.0, it will not display in Interact even if you deploy it. The form must be saved so it has a version number of 0.1 or higher for the form to be displayed in Interact.

Add a role to the form

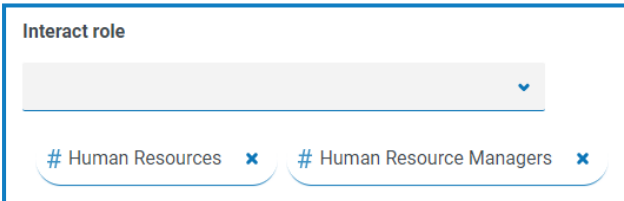
The role must exist in Blue Prism Hub to be able to assign a form to it. If you need a new role, contact your Hub administrator.

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

The Edit basic information page displays.

2. In **Interact role**, select the role you want to assign the form to.

The name of the role displays below the field. You can select more than one role from the list, for example:



3. Click **Save** to update the form information and link it to the selected role.

The Forms page displays. Your form is now available to users of that role in Interact.


Add a form to a role

You can only use this method if you are a Hub administrator.

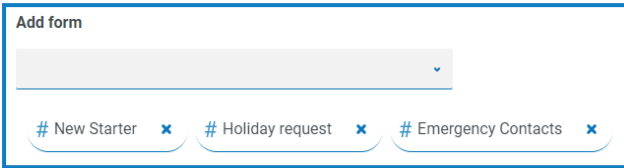
1. Click your profile icon to open the Settings page, and then click **Roles and permissions**.

The Roles and permissions page displays.

2. Select the role that you want to add the form to and click **Edit**.

 If there is not a suitable role, you can create a new role.

3. Select the form that you want the user role to have access to from the **Add forms** drop-down list. The name of the form displays below the field. You can select more than one form, for example:



The screenshot shows a user interface for adding forms. At the top, there is a label "Add form" above a grey dropdown menu. Below the dropdown, three forms are listed as tags: "# New Starter", "# Holiday request", and "# Emergency Contacts". Each tag has a small blue 'x' icon to its right, indicating it can be removed.

4. Click **Save** to save the changes to the role.

Using the capture types in forms

This section details each capture type and the controls that can be applied to restrict the data input into the fields within an Interact Form. There are twelve different capture types listed below with examples and configurable parameters.

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

Text

If you need to create a field that ensures a user enters the correct information in the correct format, then the Text capture type is the best solution. The Text field is the most commonly used capture type. It allows data to be entered in alphanumeric combinations; so, both letters and numbers are accepted.

Create text Reset all Cancel Change type

Define the details of your desired capture field

Mask data on entry

Purge data on submission

Initial state *
Optional

Label *

Automation ID *

Description
150 Characters remaining

Placeholder

Simple
 Regex

Minimum character length

Maximum character length

Allowed characters



Non-allowed characters

Initial value

Create another

Create field

As standard, the Text capture type supports the use of simple regular expressions which can be controlled by setting values for the fields detailed in the table below.

Field	Description
Minimum character length	The minimum amount of characters that can be typed into the field. This must be greater than 0.
Maximum character length	The total maximum number of characters that can be entered into the field. The maximum number that can be set is 50.
Allowed characters	The character set that the user can use. This uses simple regular expressions and so a user can type '[A-F]' forcing the user to only enter the characters between A to F, in uppercase. You can enter some of the other regular expressions such as the ' ' meaning 'or'. So, if you enter '[A-F][a-f]' a user can enter the characters between A to F either in upper or lowercase.
Non-allowed characters	This works in a very similar way to the Allowed characters . Here you can specify the characters that you do not allow in the text field. For example, it could be something as simple as '&' to restrict the use of an ampersand when users are entering text.
Initial value	The initial value allows you to specify the initial value that the user will see when they access the form.
Mask data on entry	<p>This is an important option when the information being submitted is sensitive and you do not want other people to see the data on screen. For example, personal information about date of birth is a private piece of information. So, if you select Mask data on entry, the user will see dots appear as they type the information. This information is masked for everyone using Interact. When the data is passed to Blue Prism, the Digital Worker is able to view the data for processing in the automation.</p> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p> Mask data on entry is only available within the text field. Therefore, if you want to submit a number and redact the content after submission then you should use a text field to input rather than a number field.</p> </div>
Purge data on submission	<p>This is an important option when the information being submitted is sensitive. If this option is selected, any data entered into this field by the Interact user will be removed when the form is submitted and will not be stored in the Interact database. The information that was entered into these fields will not be present in the audit log entry in Hub for the submitted form. The data is only stored in the Blue Prism database, and any additional storage destinations configured as part of the automation process for the form.</p> <p>For fields where this option is set, an information icon displays next to the field on the form with a tooltip indicating that the information in this field will be purged.</p> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p> To prevent Interact approvers from being able to see information entered into this field, select Mask data on entry in addition to Purge data on submission.</p> </div>

Alternatively, **Regex** can be selected and more complex regular expressions can be configured. For more information, see [Using regular expressions on page 62](#).

Text field example

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

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

Create text

Define the details of your desired capture field

Reset all
 Cancel
 Change type

Mask data on entry

Purge data on submission

Initial state *

Mandatory ▼

Label *

National Insurance Number

Automation ID *

national-insurance-number

Description

National Insurance Number, for example, AA123456C

101 Characters remaining

Placeholder

Simple

Regex

Regex *

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

Validation error message *

Invalid National Insurance Number

Initial value

Create another

Create field

You can test the character string restriction and view the field behavior. Enter a correctly formatting number into the appropriate form field on the Edit form page, this value is accepted and validation error message is not displayed. Then, clear the field and then enter an incorrectly formatted number, this results in the validation error message being displayed.

National Insurance Number *

National Insurance Number, for example, AA123456C

AA987654D

National Insurance Number *

Invalid National Insurance Number

AA987654K

Text area

The Text area capture type has many of the same features as the Text capture type, but enables the user to enter a large amount of information as multiple lines of text, up to 3500 characters. It allows data to be entered in alphanumeric combinations; so, both letters and numbers are accepted.

Create text area

Define the details of your desired capture field

Initial state *

Optional
▼

Label *

Automation ID *

Description

150 Characters remaining

Placeholder

Simple

Regex

Reset all
Cancel
Change type

Minimum character length

Maximum character length

Allowed characters

Non-allowed characters

Initial value

3500 Characters remaining

x Create another

Create field

By default, the Text area capture type uses simple regular expressions, which can be controlled by setting values for the fields detailed in the table below.

Field	Description
Minimum character length	The minimum amount of characters that can be typed into the field. This must be greater than 0.
Maximum character length	The total maximum number of characters that can be entered into the field. The maximum number that can be set is 3500.
Allowed characters	The character set that the user can use. This uses simple regular expressions and so a user can type '[A-F]' forcing the user to only enter the characters between A to F, in uppercase. You can enter some of the other regular expressions such as the ' ' meaning 'or'. So, if you enter '[A-F][a-f]' a user can enter the characters between A to F either in upper or lowercase.
Non-allowed characters	This works in a very similar way to the Allowed characters . Here you can specify the characters that you do not allow in the text field. For example, it could be something as simple as '&' to restrict the use of an ampersand when users are entering text.
Initial value	The initial value allows you to specify the initial value that the user will see when they access the form.

Alternatively, **Regex** can be selected and more complex regular expressions can be configured. For more information, see [Using regular expressions on page 62](#).

Text area field example


In the example below, the field has been set to optional without any further restrictions:

This example is shown below in conjunction with a Text field. The Text field is used to capture the user's role or job title and the Text area field is available for them to enter some information about their roles and responsibilities:




Number

The Number capture type has numerous features to control how your users enter their data and how it is displayed.

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

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

Create number

 Reset all
 Cancel
 Change type

Define the details of your desired capture field

Initial state *

Optional

Label *

Automation ID *

Description

150 Characters remaining

Placeholder

Prefix character

Only allow whole numbers

Decimal point place

Show commas

Minimum value


Maximum value

Step

Initial value

Create another

Create field

Field	Description
Prefix character	<p>Adds a prefix character in the form display. This is useful when entering monetary values.</p> <p> The prefix character is not sent through to your automations.</p> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p>Prefix character</p> <input style="width: 100%; border: none;" type="text" value="£"/> </div>
Only allow whole numbers	Restricts the user to enter only whole numbers in the data field.
Decimal point place	Specifies the number of decimal places you want for the data entered. You can have up to a maximum of fifteen decimal point places.
Show commas	<p>Enters a comma whenever the number exceeds a thousand.</p> <p>This is the UK format with a comma used as a separator between thousands and a decimal point for fractions (for example, £25,000), as opposed to several European countries where the comma and decimal point are swapped.</p>
Minimum value	Sets a minimum value for the number to be entered by the user into the field.
Maximum value	Sets a maximum value for the number to be entered by the user into the field.
Step	Defines a step value. Working in conjunction with the arrow in the data entry field, where a user toggling the arrows will force the number to step in the defined steps.
Initial value	Sets an initial value for number in the field.

Number field example

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

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


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

Date

The Date capture type has a range of features to control how your users enter their data and how it is displayed. The blank form below shows the available options.

Field	Description
Date format	Define the format of the date. Three options are available: <ul style="list-style-type: none"> • US format MM/DD/YYYY • UK format DD/MM/YYYY • International format YYYY/MM/DD
Placeholder	The text entered in this field displays as gray text in the Date field on the form prior to a user entering information. It can be useful to enter the format of the date that you want the user to put into the field on the form.
Allow dates	Controls whether dates are allowed only in the past, only in the future, or any dates. For example, when entering a date of birth, it would only be dates in the past and not the future that would be required.
Past date restriction	Creates a window of the dates that the user of the form can access, for example setting 14 days will create a window of just 14 days in the past that the user can access.
Future date restriction	Creates a window of the dates that the user of the form can access, for example setting 14 days will create a window of just 14 days in the future that the user can access.

Field	Description
Initial value	<p>A drop-down menu that offers five options: None, Today, Today +, Today -, and Custom date.</p> <p>An initial value must be set. If you have no restrictions, this can be set to None. However, you can also restrict the initial value to Today or Today + or – a number of days. So, for setting an initial value of a fortnight ago, you would enter Today -, and then in the new field enter 14 days.</p> <div data-bbox="365 508 999 801" style="border: 1px solid #0070C0; padding: 5px;"> <p>Initial value *</p> <p>Today -</p> <p>Days from today's date *</p> <p>14</p> </div> <p>If that doesn't give you the date as an initial value you require, you can select Custom date and specify a specific date, for example the last day of the 20th century.</p> <div data-bbox="365 945 999 1249" style="border: 1px solid #0070C0; padding: 5px;"> <p>Initial value *</p> <p>Custom date</p> <p>Custom date *</p> <p>12/31/1999</p> </div>

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

Date field example

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

Create date

Reset all
Cancel
Change type

Define the details of your desired capture field

Initial state *

Label *

Automation ID *

Description

120 Characters remaining

Date format *

Placeholder

Allow dates

Any

Only past

Only future

Past date restriction

Future date restriction

Initial value *

Create another

[Create field](#)

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

Start Date

Start date for the new starter

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

←
→

Time

There is only one field that can be used to control the user entry in the Time field which is the **Initial value**. This field will set a default value in the display that the user can then change as required, see below.

Create time

Reset all
Cancel
Change type

Define the details of your desired capture field

Initial state *

Optional

Label *

Automation ID *

Description

150 Characters remaining

Initial value

00:00:00

Create another

Create field

Time field example

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

Create time

Reset all
Cancel
Change type

Define the details of your desired capture field

Initial state *

Optional

Label *

Start Time

Automation ID *

start-time

Description

Enter the start time for the new starter

110 Characters remaining

Initial value

09:00:00

Create another

Create field

Start Time

Enter the start time for the new starter

09:00:00

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

Upload

The Upload capture type allows a file or image to be parsed into an automation for further processing. The transfer is for any formats except for executable files with a .exe file extension. Files are stored within 'blob' storage and a URL is included in the collection sent to the Blue Prism Queue.

The Upload field only has one controlling aspect which is the extension of the file being uploaded, this being the **Input type**. If:

- **Image** is selected as the file type, then you can select from one to three file types: JPG, PNG or GIF.
- **File** is selected, then you can add a list of extensions that you want to support in the form. These need to be added without the leading '.' and separated by commas. You cannot load executables, those with '.exe' extension.

Create upload Reset all Cancel Change type

Define the details of your desired capture field

Initial state *
Optional

Label *

Automation ID *

Description
150 Characters remaining


Input type
 File
 Image

Accepted extensions (comma separated) *

Max size (MB) *

Create another

Create field

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

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

Upload field example

An example upload field is shown below that will allow the Interact user to upload a CV of the new starter. The document that is uploaded can be in PDF, Microsoft Word, or Text format.

Create upload Reset all Cancel Change type

Define the details of your desired capture field

Initial state *
Mandatory

Label *
Load CV

Automation ID *
load-cv

Description
Upload the CV of the new starter
118 Characters remaining

Input type
 File
 Image

Accepted extensions (comma separated) *
pdf, doc, docx, txt

Max size (MB) *
5

Create another

[Create field](#)



The allowed extensions must be entered without a leading period or full stop ‘.’.

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

Load CV *
Upload the CV of the new starter

[Upload](#)

Paragraph

The Paragraph capture type allows you to add formatted text onto the form to provide information to assist the Interact user in submitting the correct information in the correct format. You can use formatting techniques to bold, underline, italicize, and highlight text to emphasize the important parts of the text. You can also add a hyperlink to the text. In addition, there are predefined types that can be used which add an icon and colored box around the text. These types are:

- **Paragraph** – This is selected by default and does not apply any additional formatting to the text.
- **Alert** – Displays a red icon and border.
- **Information** – Displays a blue icon and border.
- **Warning** – Displays an orange icon and border.

The paragraph can be deployed in a hidden state initially and then only revealed depending upon a rule condition being met, or updated when a Digital Worker has updated the form in an automation.

Paragraph fields are restricted to 5000 characters.

Create paragraph Reset all Cancel Change type

Define the details of your desired capture field

Type *
Paragraph

Label *
Note: The label will be displayed within form rules only.

Automation ID *

Paragraph *
B / U A

5000 Characters remaining




Hidden

Create another

Create field

The formatting options are:

B	Bold – Select the required text and click this icon. The text displays in bold .
<i>/</i>	Italic – Select the required text and click this icon. The text displays in <i>italics</i> .
<u>U</u>	Underline – Select the required text and click this icon. The text displays <u>underlined</u> .
 	Highlight – Select the required text and click this icon. The text displays highlighted in yellow .

	<p>Text color – Select the required text, click this icon and select the required color from the palette. Alternatively, if you want all the text to be a different color, select the color before you start typing.</p>
	<p>Link – Select the required text and click this icon. In the Add link dialog, enter the URL and click Save. The link is added to the text. When you hover over the text with your mouse cursor, the text displays as underlined indicating the presence of the link.</p>
	<p>Unlink – Select the required text that has a link applied to it and click this icon. The link is removed.</p>

Paragraph field example

The example below shows some paragraph text with formatting:

click here.' Below the text area is a character count '4712 Characters remaining'. At the bottom, there are two checkboxes: 'Hidden' (unchecked) and 'Create another' (unchecked), and a 'Create field' button." data-bbox="71 301 465 686"/>

If the example text uses the **Paragraph** type, the information displays in the form as shown below:

click here.' The text is plain, with no icons or borders." data-bbox="71 720 659 792"/>

If the **Information** type is used, the paragraph displays with an icon and blue border:

click here.' The text is plain, with no rich text formatting." data-bbox="71 825 659 920"/>

Horizontal rule

The Horizontal rule capture type is used for cosmetic purposes to break up large pages in a form, by separating the form into sections to ease its readability. The line can be padded to control the space before and after, with a maximum of 999px either side of the line.

Horizontal rule field example

The example below shows the padding settings for a horizontal rule and how it appears below a paragraph field example.

This form is the **New Starter** form. The form will take the information provided and, using an automation, will set the new starter up within the Payroll System. The automation will then email the new starter with their payroll number.




Dropdown

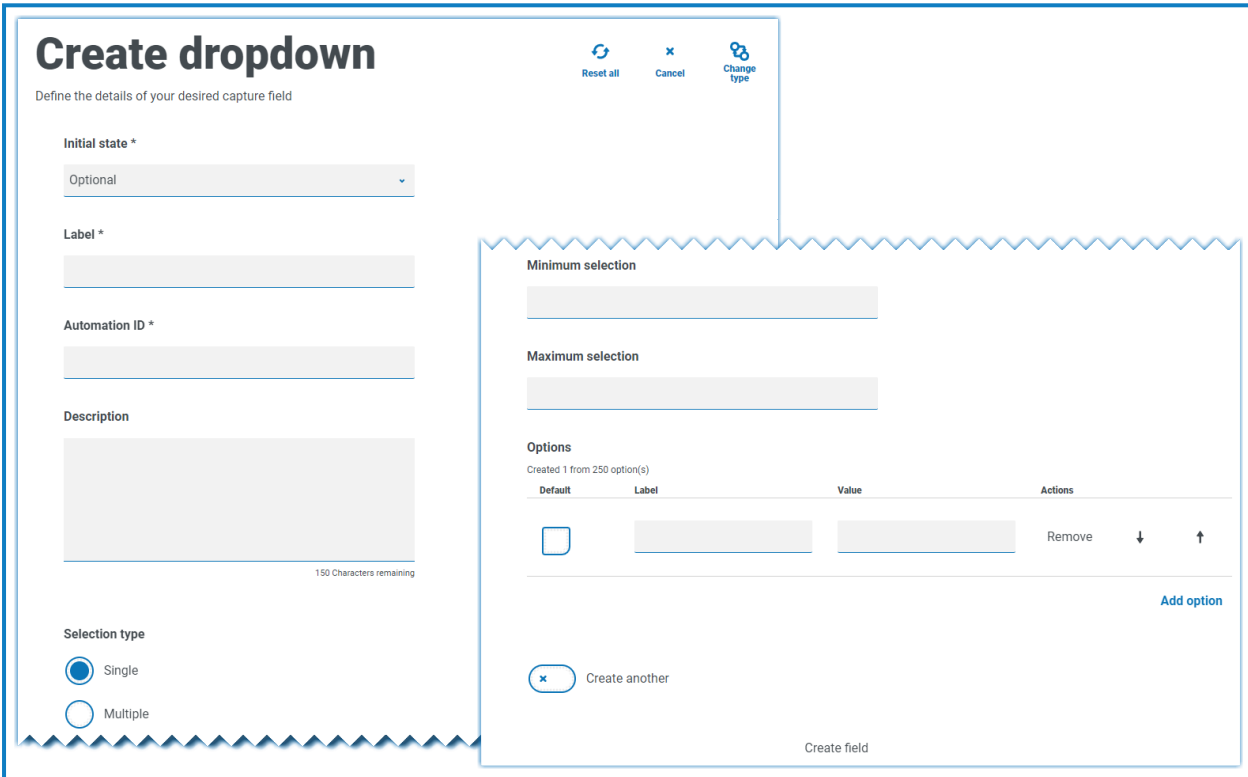
The Dropdown capture type enables you to configure a drop-down menu that allows an Interact user to select either single or multiple items from a drop-down menu.

For a:

- Single selection, a list can be provided which will enable a user to select one item from the list.
- Multiple selection, the user can either choose any number of items, a minimum number of items, or a maximum number of items. This is dependent on the values configured in the **Minimum selection** and **Maximum selection** fields.

 When defining the list of items that will appear in the drop-down, if you enter them in the wrong order, you can use the arrows to the right to reorder the list.

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



Create dropdown
Define the details of your desired capture field

Initial state *
Optional

Label *
[Text input field]

Automation ID *
[Text input field]

Description
[Text area, 150 Characters remaining]

Selection type
 Single
 Multiple

Options
Created 1 from 250 option(s)


Default	Label	Value	Actions
<input type="checkbox"/>	[Text input]	[Text input]	Remove ↓ ↑

[Add option](#)

Create another

Create field

Field	Description
Minimum selection	The minimum number of items that the user can select from the drop-down list on the form. This field is not relevant if the Selection type has been set to Single .
Maximum selection	The maximum number of items that the user can select from the drop-down list on the form. There is no restriction on the maximum number that can be set. If no value is set, the user could select every item in your list. This field is not relevant if the Selection type has been set to Single .
Options – Default	If this is to be the default value for the drop-down field, select the Default box.
Options – Label	The text that will be displayed in the drop-down list. Labels are restricted to 50 characters.
Options – Value	The value associated with the drop-down item. This can be different to the label. The value is restricted to 50 characters.
Options – Remove	If required, click Remove to delete the item from the list.

 The **Radio group** and **Checkbox group** fields perform a similar function to the Dropdown field, which is the selection of either a single or multiple items. However, if the space on your form is restricted, then the Dropdown is the recommended route especially if there is a large quantity of items. If there are only a few items to select from and the form overall size doesn't matter, then either the Radio group or Checkbox group fields can be utilized.

Dropdown field example

An example configuration of a single selection drop-down field is shown below:

Create dropdown

Define the details of your desired capture field

Reset all
Cancel
Change type

Initial state *

Optional

Label *

Driving license

Automation ID *

driving-license

Description

Do you have a full driving license?

115 Characters remaining

Selection type

Single

Multiple

Minimum selection

Maximum selection

Options

Created 3 from 250 option(s)

Default	Label	Value	Actions
<input type="checkbox"/>	Yes - I have a clean license	yes--i-have-a-clean-license	Remove ↓ ↑
<input type="checkbox"/>	Yes - I have a license with en...	yes--i-have-a-license-with-e...	Remove ↓ ↑
<input type="checkbox"/>	No - I don't have a license	no--i-dont-have-a-license	Remove ↓ ↑

Add option

Create field

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

Driving license

Do you have a full driving license?

|
▼

Yes - I have a clean license

Yes - I have a license with endorsements

No - I don't have a license

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

When items are chosen from the drop-down list, they will appear below the field on the form. Items selected accidentally can be removed by selecting the 'x' alongside the item.


Radio group

The Radio group capture type, like the [Dropdown](#), allows Interact users to select a single item – this capture type does not allow for multiple entries to be selected. The Radio group will take more real estate on the form so if there are a large number of items that need to be selected from, then a Dropdown may be a better solution.

You can control what the user sees by listing the chosen items and if required can choose a default value.

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

For information about the fields and their limitations, see [Dropdown on page 51](#).

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

Radio group example

The example below shows a radio group where the user has to choose between three options.

Create radio group

Define the details of your desired capture field

Initial state *

Mandatory

Label *

Gender

Automation ID *

gender

Description

The gender of the new starter

114 Characters remaining

Reset all Cancel Change type

Options

Created 3 from 10 option(s)

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

Add option

Create another

Create field

Gender *

The gender of the new starter

Male

Female

Not specified

Checkbox group

The options available when configuring the Checkbox group are the same as the [Dropdown](#). The Checkbox group can be configured to allow either a single selection or multiple selections. Similarly the number of items that can be chosen can be set using the **Minimum selection** and the **Maximum selection** values. The Checkbox group displays all the items on the form, as opposed to the Dropdown field where the user scrolls through a list.

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

For information about the fields and their limitations, see [Dropdown on page 51](#).

Checkbox group example

The example below shows a Checkbox group where there are six options that the user can select from. However, if the field is left as a single selection type, the user can only select one item. This is the same functionality as the radio group field but presents a different display.

Create checkbox group

Define the details of your desired capture field

Reset all
Cancel
Change type

Initial state *

Mandatory

Label *

Education Qualifications

Automation ID *

education-qualifications

Description

Select all education qualifications that apply

104 Characters remaining

Selection type

Single

Multiple

Minimum selection

Maximum selection

Options

Created 7 from 10 option(s)

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

[Add option](#)

[Create field](#)

Education Qualifications *

Select all education qualifications that apply

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

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

Create checkbox group

Define the details of your desired capture field

Initial state *
Mandatory

Label *
Education Qualifications

Automation ID *
education-qualifications

Description
Select all education qualifications that apply
104 Characters remaining

Selection type
 Single
 Multiple

Minimum selection
1

Maximum selection
4

Options
Created 7 from 10 option(s)

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

[Add option](#)

Create another

[Create field](#)

Education Qualifications *

Select all education qualifications that apply

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

Table

The Table capture type enables you to enter a table within a form that can be used to collect data. You can control the number of rows in a table that the Interact user sees, construct the number of columns that are needed, assign column headings, and define the type of data to be entered in the table cells. A maximum of 15 columns can be added to a table. The user can then add or delete rows to the table as controlled through the settings on the table element.

You can set the **Initial row count**, the **Minimum number of rows**, and the **Maximum number of rows**.

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

Table example

In this example, a list of dependents is being collected from the user. This example defines a table starting with an initial row count of one row, with no minimum or maximum row count set. The columns are configured to use different data types – text, date, and number. This displays the following:

Create table

Define the details of your desired capture field

Reset all
Cancel
Change type

Initial state *

Optional

Label *

Dependents

Automation ID *

dependents

Description

List any dependents

131 Characters remaining

Initial row count

1

Minimum number of rows

Maximum number of rows

Columns

Created 3 from 15 column(s)

Allow empty value	Type	Label	Value	Actions
<input type="checkbox"/>	Text	Name	name	Remove ↓ ↑
<input type="checkbox"/>	Date (DD/MM/)	Date of birth	date-of-birth	Remove ↓ ↑
<input type="checkbox"/>	Number	Age	age	Remove ↓ ↑

Add column

Create another

Create field

Dependents

List any dependents

Name	Date of birth	Age	Actions
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	Remove

Add row

When the form is deployed to Interact, the table displays in a visually different way to that shown in the testing area. The table displays as a more traditional table in the Interact website, with clearly defined borders between the columns. Horizontal and vertical toolbars display when required. For example:

Dependents

List any dependents

Name	Date of birth	Age	Actions
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	Remove

Add row

→

Dependents

List any dependents

Name	Date of birth	Age	Actions
<input style="width: 90%;" type="text" value="Enter text"/>	<input style="width: 90%;" type="text" value="Select date"/>	<input style="width: 90%;" type="text" value="Enter number"/>	Remove

Add row

Using regular expressions

Regular expressions (regex) can be used to control the data being entered into Interact forms by your users.

When creating an Interact form you often need to control the data fields to restrict what your users can enter, for example a National Insurance or Social Security number. Restricting data entry helps to guide your users to put the required information in, in the correct format.

If you choose the **Regex** option in the Form designer, you can program the structure for the data that appears.



Only the **Text** and **Text area** capture types offer full regular expression capabilities. The other capture types offer other, simple restrictions to control the data input.

The table below illustrates the more common characters that can be used in the **Regex** field and gives you some examples of the matching performed.

Field	What does it do?	Example	Matches
^	Matches beginning of line	This marks the start of your regex entry	
\$	Matches end of line	This marks the end of your regex entry	
.	Matches any character	^a.c\$	abc, a2c, axc
	OR character	^abc xyz\$	abc or xyz
[...]	Matches anything contained in brackets	^[A-E]\$	Can only use uppercase A to E
[^...]	Matches anything not contained in brackets	^[^A-E]\$	Cannot use uppercase A to E
{x}	The exact 'x' amount of times to match	^[A-E]{2}\$	Can only use uppercase A to E and must contain at least 2 characters
{x,y}	Match between 'x' and 'y' times	^[A-E]{2,4}\$	Can only use uppercase A to E and must contain at least 2 characters and no more than 4
{x,}	Match 'x' amount of times or more	^[A-E]{2,}\$	Can only use uppercase A to E and must contain at least 2 characters but no limit on total number
+	Matches character before + one or more times	^ab+c\$	Matches abc, or abbbc
?	Matches the character before the ? zero or one times	^ab?c\$	Matches ac, or abc
!	Switches the matching of a character to be not allowed	^(?!000)[0-8][0-9]{2}\$	Three digits between 001 to 899 allowed, but specifically 000 is not allowed

Example: National Insurance Number

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

Here is an explanation of this regular expression:

- `^` – the beginning of string
- `[A-CEGHJ-PR-TW-Z]{1}` – matches the first letter, it cannot be D, F, I, Q, U or V
- `[A-CEGHJ-NPR-TW-Z]{1}` – matches the second letter, it cannot be D, F, I, O, Q, U or V
- `[0-9]{6}` – must be six digits
- `[A-D]{1}` – matches last letter which can only be A, B, C or D
- `$` – the end of the string

This is what a valid National Insurance Number looks like.

National Insurance Number

This is what an invalid national insurance number looks like.

Invalid National Insurance Number

Invalid National Insurance Number entered.

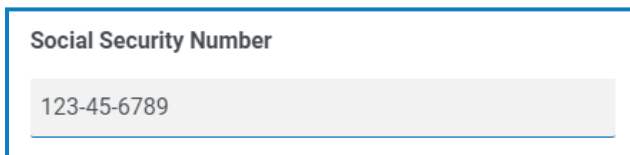
Example Social Security Number

$\wedge(?!000|666)[0-8][0-9]{2}-(?!00)[0-9]{2}-(?!0000)[0-9]{4}\$$

Here is an explanation of this regular expression:

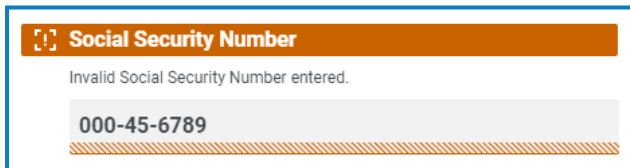
- \wedge – the beginning of string
- $(?!000|666)$ – does not allow either 000 or 666 to be entered
- $[0-8][0-9]{2}$ – matches the first digit between 0 and 8, and the next two digits between 00 and 99
- $-$ – the user has to type a hyphen as a separator
- $(?!00)[0-9]{2}$ – matches two digits between 01 and 99, specifically stopping 00 from being entered
- $-$ – the user has to type a hyphen as a separator
- $(?!0000)[0-9]{4}$ – matches four digits between 0001 and 9999, specifically stopping 0000 from being entered
- $\$$ – the end of the string

This is what a valid Social Security Number looks like.



A screenshot of a form field labeled "Social Security Number". The input field contains the text "123-45-6789". The field is highlighted with a blue border.

This is what an invalid Social Security Number looks like.



A screenshot of a form field labeled "Social Security Number". The input field contains the text "000-45-6789". Above the input field, there is an error message: "Invalid Social Security Number entered." The field is highlighted with a blue border and a red wavy underline.

Example: UK mobile number

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

Here is an explanation of this regular expression:

- `^` – the beginning of string
- `07` – must start with these two characters
- `([\d]{3})` – must be three digits
- `[(\D\s)]?` – an optional space
- `([\d]{3})` – must be three digits
- `[(\D\s)]?` – an optional space
- `([\d]{3})` – must be three digits
- `$` – the end of the string

This is what a valid UK mobile number looks like.

Mobile

Enter your mobile number

or

Mobile

Enter your mobile number

This is what an invalid UK mobile number looks like.

Mobile

Invalid mobile number. Please check and re-enter.

Using rules

Rules allow you to create simple if-then structures to manipulate fields and pages in a form depending on specified conditions being met. For example, you can hide or show a field or page depending on a given condition being met.

Rules Examples

To best illustrate the use of rules, we have an example Interact form covering an onboarding process. We have defined some simple rules to show how they can be used in Interact. The form looks as follows:



The screenshot displays the 'HR Onboarding' form in Interact. The interface is split into two main sections: a design view on the left and a preview view on the right. The design view shows a list of form components including 'Employee details', 'First Name', 'Last Name', 'Date of Birth', 'Office Location', 'National Insurance Number', and 'Social Security Number'. Each component has a 'Mandatory' label and a 'Rule' icon. Two rules are defined in the design view:

- Rule 1: If 'Office Location' equals 'United Kingdom' then 'Social Security Number' state is 'hidden'.
- Rule 2: If 'Office Location' equals 'United States' then 'National Insurance Number' state is 'shown'.

The preview view shows the form rendered as it would appear to a user. The 'Office Location' field has radio buttons for 'United Kingdom' and 'United States'. The 'National Insurance Number' field is visible, and the 'Social Security Number' field is hidden, demonstrating the effect of the rules.

The first example rule is controlling the fields or pages that a user can see. So even if you give a user access to a form through the standard Hub user management, you can hide specific fields for a user that they will not be able to access.

In our example below, though the user Marion Smith has access to the form, she cannot access the Payroll Details field. This ensures that Marion cannot add payroll details for new starters, whereas other users of the form can.

 **If 'Submitter'**
 Cancel


Condition *

is

Value *

Type to find another one

Marion Smith

 **Then**

Elements group *

Fields

Pages

Default elements

Field *


Payroll Details

Condition *

state is

State *

hidden

 Create another
Create rule

Our second example is probably the most common use of rules. In the form we have a field that allows the user to select whether the new starter being onboarded is based in the United Kingdom or the United States. If they select United Kingdom, then we want the user to enter the National Insurance Number, if the user selects United States then a Social Security Number should be visible.

This requires two rules as you cannot hide the fields initially, so you have to 'hide' the fields depending on the option chosen. Here are our two rules.

If 'Office Location'

Condition *
equals

Value *
United Kingdom

Then

Elements group *
 Fields
 Pages
 Default elements

Field *
Social Security Number

Condition *
state is

State *
hidden

Create another Create rule

If 'Office Location'

Condition *
equals

Value *
United States

Then

Elements group *
 Fields
 Pages
 Default elements

Field *
National Insurance Number

Condition *
state is

State *
hidden

Create another Create rule

The first rule states that if the Office location is set to United Kingdom then hide the Social Security Number, the second rule is the reverse, hiding National Insurance Number when United States is selected.

You should also consider adding rules to redisplay the fields in the event of user error, for example, what will happen if the user accidentally selects the wrong option and then selects the correct one? With only these two rules defined, both fields will be hidden as there is nothing in place to tell a hidden field to reappear. Therefore, two additional rules should be added:

- If 'Office Location' equals 'United Kingdom' then 'National Insurance Number' state is 'optional'.
- If 'Office Location' equals 'United States' then 'Social Security Number' state is 'optional'.

This then ensures that the user only sees a single field for entering the appropriate number for the geographical location.

Both fields in the form are set to an optional state. If they were set to mandatory then the user would need to complete the field, even when they couldn't see it.

Our final example rule is to unhide a page in the form. We have in our form a hidden page, this is the Payroll Details page. This page is only visible when the Payroll Details field is set to Yes as illustrated below.

If 'Payroll Details'

Condition *

equals

Value *

Yes

Then

Elements group *

Fields

Pages

Default elements

Page *

Payroll Details

Condition *

state is

State *

visible

Create another Create rule

This rule works in conjunction with the first rule we described. As Marion doesn't have access to the Payroll Details field, she cannot ever get to the second page.

Rules Logic

The rules logic varies depending on the element that is being used within the form. The table below shows the rule logic that can be applied for the specific element type .

Field type	IF options	Then Options	States
Text	Contains, Does not contain, Equals, Does not equal	State is Set value to	Optional Mandatory Read only Hidden
Text Area	Contains, Does not contain, Equals, Does not equal	State is Set value to	Optional Mandatory Read only Hidden
Number	Equals, Does not equal, Is less than, Is less than or equal to, Is more than, Is more than or equal to	State is Set value to	Optional Mandatory Read only Hidden
Date	Equals, Does not equal, Is after, Is before, Is in month, Is not in month, Is in year, Is not in year	State is Set value to	Optional Mandatory Read only Hidden
Time	Equals, Does not equal, Is after, Is before	State is Set value to	Optional Mandatory Read only Hidden
Upload	File size is greater than, Files size is less than, File type is, File type is not	State is	
Dropdown	Single choices: Equals, Does not equal Multiple choices: Contains, Does not contain, Selection quantity is, Selection quantity is not, Selection quantity is less than, Selection quantity is less than or equal to, Selection quantity is more than, Selection quantity is more than or equal to	State is Set value(s) to	Optional Mandatory Read only Hidden
Radio Group	Equals, Does not equal	State is	Optional Mandatory Read only Hidden
Checkbox Group	Single choices: Equals, Does not equal Multiple choices: Contains, Does not contain, Selection quantity is, Selection quantity is not, Selection quantity is less than, Selection quantity is less than or equal to, Selection quantity is more than, Selection quantity is more than or equal to	State is Set value(s) to	Optional Mandatory Read only Hidden
Table	Number of rows added equals, Number of rows added is more than, Number of rows added is less than	Not selectable	

The following apply for the default items:

Field	Description
Pages	Can only be added into a Then and allows State changes of Hidden and Visible.
Submitter	Can only be added into an If and allows <i>is</i> and then a defined <i>submitter</i> to be provided.
Submission	Can only be added into a Then and either send for approval or not. The two options are <i>Needs approval</i> or <i>Doesn't need approval</i> .
Priority	Can only be added into a Then and the option available is <i>is</i> where a priority can be set than overrides the default set on the form basic information page.
SLA	Can only be added into a Then and the option available is <i>is</i> where a SLA can be set than overrides the default set on the Form basic information page.

Interact restrictions

The following restrictions apply to the elements of Interact.

Number of elements

The maximum number of elements are:



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

Custom icons for forms

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

Form field restrictions

The table below lists the form field restrictions.


Field	Datatype	Applicable Restrictions
Automation ID	Text	The automation identifier is restricted to 50 characters.
Descriptions	Text	The descriptions for all fields are restricted to 150 characters.
Label	Text	Labels are restricted to 50 characters.  This also applies to the labels for items that appear in list type fields, such as Dropdown , Radio group , and Checkbox group .
Paragraph	Text	Paragraph fields are restricted to 5000 characters.
Upload element	File attachment – File and Image	By default, the maximum file upload size is restricted to a maximum of 5 MB and the image size is restricted to 1920 x 1080 px. The maximum size can be increased by a system administrator by changing the value defined in the Hub configuration file on the server. The value specified in the Max size field on the Create upload page cannot be greater than the value defined in the configuration file (by default, this is 5).  You cannot upload executable files (files with a .exe extension).

Customizing Interact branding

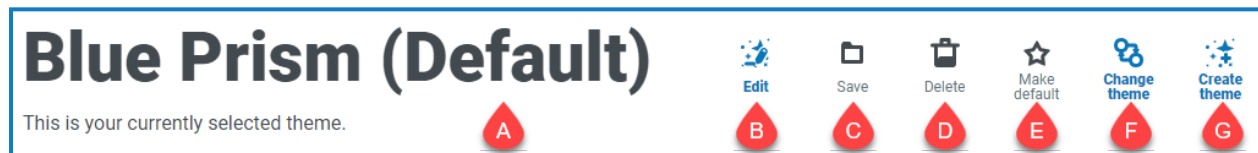
Customization enables you to change the appearance of the Interact user interface. You can create themes that control the following:

- **Theme name** – This is the brand name that will appear on the user interface.
- **Brand color** – This is the color that will be used by buttons and labels in the user interface.
- **Brand logo** – This is an image that will be used as the logo on the user interface.

You can create multiple themes which can be applied dependent upon the user, providing a different look and feel depending on who logs in. The default theme is automatically selected when creating a user, however, this can be changed.

 Only users with Hub administrator privileges can access the Customization component, configure themes, and apply themes to users.

When you open Customization from the Interact plugin, the Customization page displays with the default theme selected, for example:



This provides you with the following information and functions:


- A. Name of the currently displayed theme.
- B. **Edit** – Edit the theme that is currently displayed.
- C. **Save** – Save any changes you have made. This icon is only active when you are editing a theme.
- D. **Delete** – Delete the currently displayed theme. This icon is only active if you have more than one theme.
- E. **Make default** – Set the currently displayed theme to be the default for the system. This icon is only active if the current theme is not the default.
- F. **Change theme** – Select which theme you want to display on the page.
- G. **Create theme** – Create a new theme.

Apply a theme to users

By default, Interact users are assigned the default theme. If the default theme is changed to a different theme, they will see the new default. However, you can apply specific themes to specific users on a user by user basis.


1. Click your profile icon to open the Settings page, and then click **Users**.
The Users page displays.
2. Select the required user and click **Edit**.
3. In **Theme**, select the theme that you want to apply to the user.
4. Click **Save**.

The changes to the user are saved. They will immediately see the theme applied to Interact.

 For more information on editing users, see the [Hub administrator guide](#).

Edit and save a theme

1. On the Customization page, click **Edit theme**.
The Theme page becomes editable, indicated by the **Edit theme** button changing to a **Cancel** button and the **Reset** buttons becoming active.
2. If required, change the theme **Name**.
As you type, the *Create theme* title also changes.
3. If required, change the **Primary color** by clicking the color bar. You can:
 - Select a color using the sliding bar.
 - Enter a value using the text boxes. You can click on the ↕ icon to toggle between the different types; RGB, HSL or Hex.
4. If required, click **Upload** to change the logo to a file of your choice. You can upload PNG, JPEG or JPG files. The maximum file size allowed is 30 KB.
5. 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 theme setting.

Any changes you have made will be immediately seen by the users in Interact that use that theme.


Delete a theme

1. With the theme you want to delete shown on the screen (see [Change the theme below](#)), click **Delete**.
A message displays asking you to confirm the deletion.
2. Click **Yes** to delete the theme.

Set a new default theme

1. With the theme you want to use shown on the screen (see [Change the theme below](#)), click **Make default**.
(Default) appears next to the theme name and a notification appears confirming the change. The theme change will be seen in Interact.

Change the theme

 The **Change Theme** icon changes the theme that you are currently viewing. If you want to make changes to the theme itself, you need to [edit](#) the theme.

1. On the Customization page, click **Change theme**.
A list of available themes displays.
2. Click the theme you want to view.
The selected theme displays.
3. Close the list to return to the main tools.

Create a new theme


1. On the Customization page, click **Create theme**.

The Create theme page displays.

2. Enter the theme **Name**.

As you type, the *Create theme* title also changes.

3. Click the **Primary color** bar to change the color. You can:

- Select a color using the sliding bar.
- Enter a value using the text boxes. You can click on the  icon to toggle between the different types; RGB, HSL or Hex.

4. Click **Upload** to change the logo to a file of your choice.

5. Click **Create theme** to save your new theme.

Troubleshooting

I have made changes to a form, but the users cannot see the changes in Interact

It is likely that the changes to the form have not been saved and committed to a version. For information on saving the form, see [Save the form on page 20](#). Once the form is saved, the changes will be visible in the Interact web application.

The owner of the form no longer exists in the system, what happens to the form?

If the user who created a form (the form owner) is retired or removed from the system, the ownership of the form reverts to the generic "admin" user within Hub. This enables the form to still be accessed by that user. However, it is recommended that other users are added as members on the form, who are then responsible for changes to the form. This ensures that any changes made to the form are audited appropriately.