Interact 5.0

Web Application User Guide

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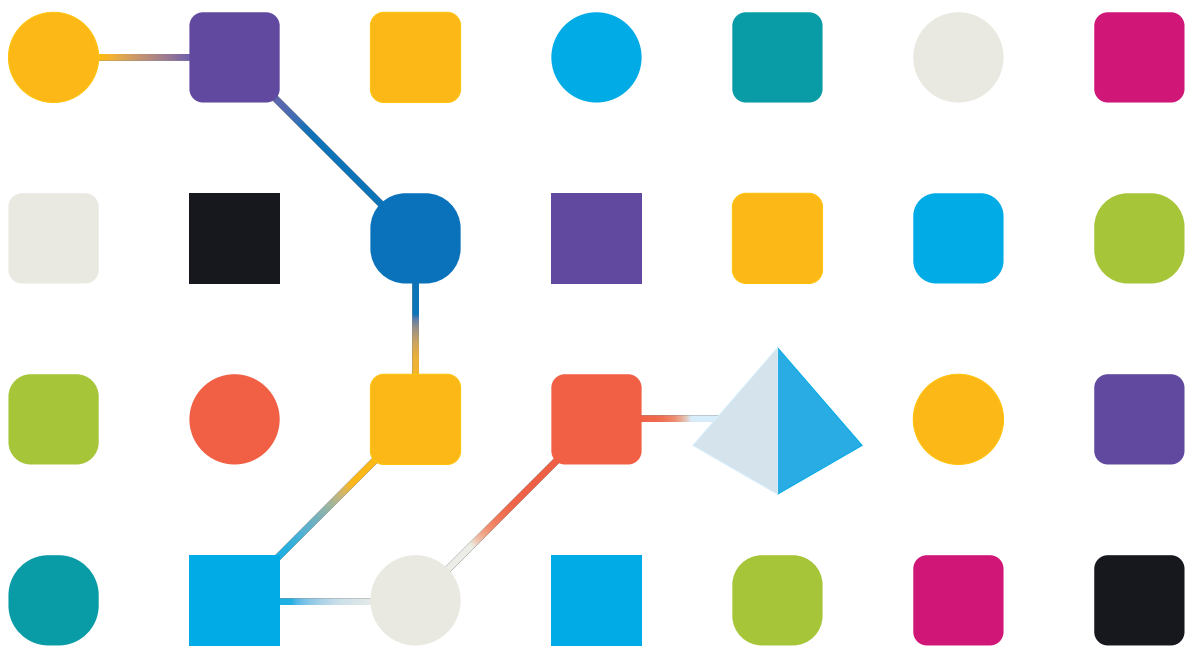
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Contents

Interact

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 web-based application. For information on the Interact plugin, see the Interact plugin user guide.

Who is this guide for?

This guide is intended to be used by the end user of the Interact web application. It covers how to use Interact from a user's perspective.

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.

Supported web browsers on client machines

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

- Google Chrome
- Microsoft Edge (Chromium-based)

To enable Active Directory users to log into Interact using a Chrome or Edge browser, the browsers must be configured for Integrated Windows Authentication.

> 📝 Microsoft Internet Explorer and Mozilla Firefox are not supported.

Requesting access to Interact

If you are a new user who does not yet have access to your organization's Interact web application, you can request access using the registration page.

> 🖋 If you have already been provided access, see Getting started with Interact on page 6.
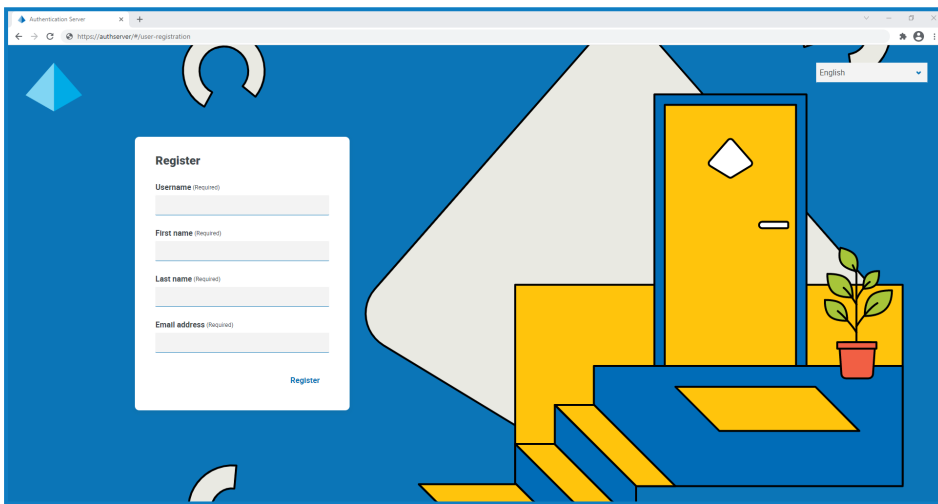
To request a user account:

1. In a web browser, open the following URL: https://{hostname}/#/user-registration.
   Where {hostname} is the address of your organization's environment, for example,
   https://authentication.blueprism.com/#/user-registration

2. Complete the required information:
   - **Username** – Enter a user name following your organization's required standards.
   - **First name** – Enter your first name.
   - **Last name** – Enter your last name.
   - **Email address** – Enter your email address.

3. Click **Register**.

   Your request is submitted and the page changes to the Login page. When an administrator has approved your request, you will receive an email with a one-time use link to complete your registration.

4. Click the link in the email to complete your registration by creating a password for Interact and logging in.

> 🖋 Although you can request access using this method, your system administrator may reject your request.
>
> There are several ways in which the system can be configured to provide user authentication – your administrator may create you an account using one of these methods, rather than approving your request.

Getting started with Interact

Your system administrator will create an account for you to use to access 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 Interact

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
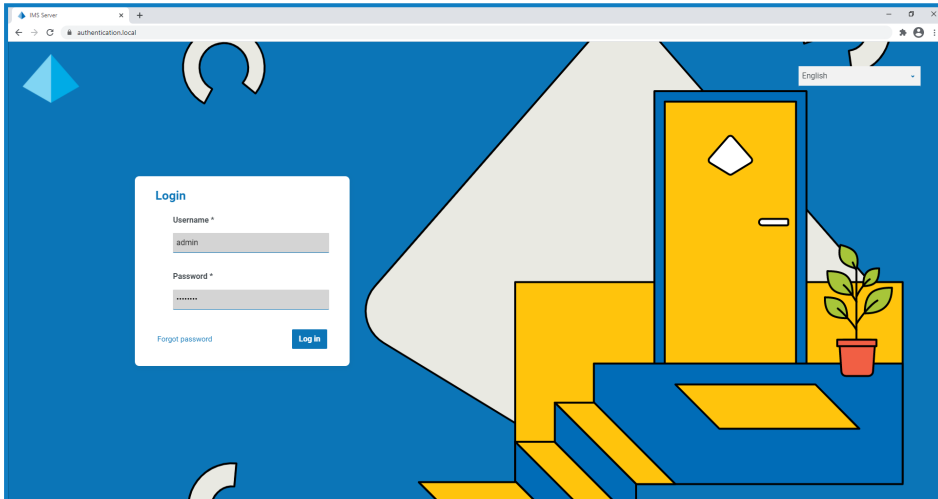
2. Enter your credentials and click **Log in**.

   The application selection screen displays. If you only have access to Interact, you will only see the Interact tile, as shown in the example below. If you also have access to Hub, you will see a tile for Hub and a tile for Interact.
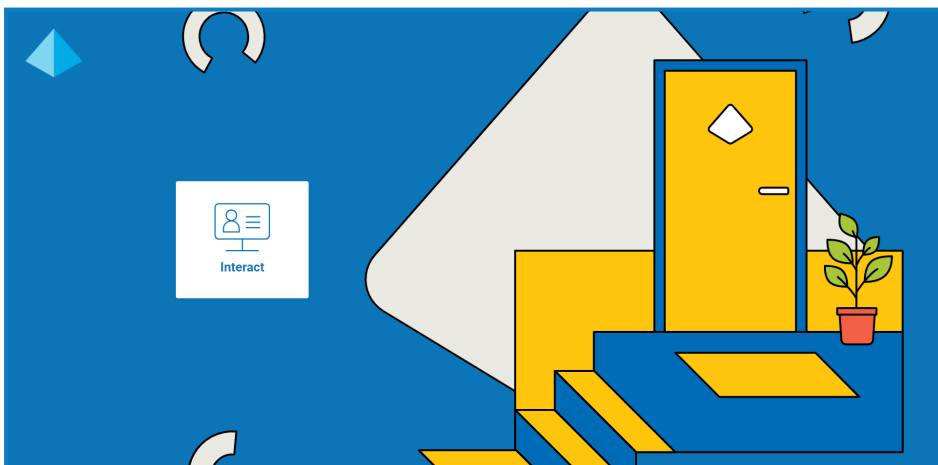
3. Click **Interact** to launch the Interact website.

Using the Interact home page

The Interact Home page displays a list of all of the Interact forms that you have been given access to.
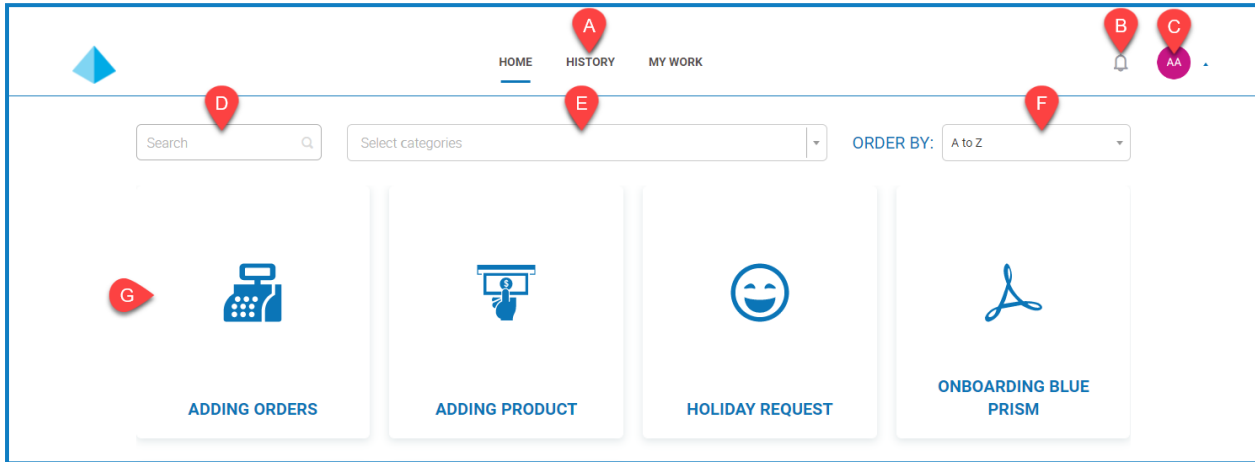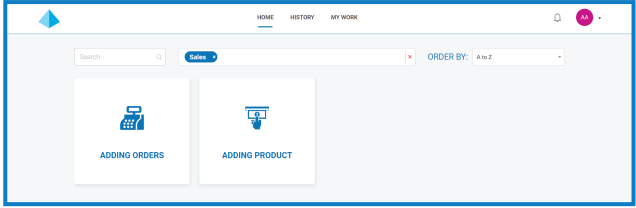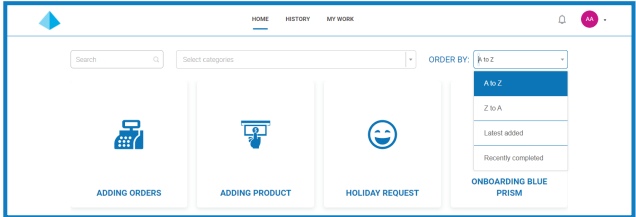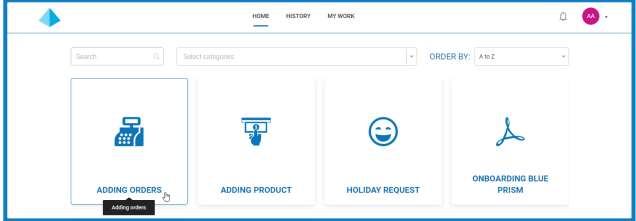

This provides you with the following features:

A	**Interact tabs** – The following tabs are available: • **Home** – Displays the available forms that you can complete and submit. • **History** – Displays all your submitted forms. You can see the submissions that are still pending approval, submissions that have been completed, and those that have been archived. • **My Work** – Displays any draft forms that are yet to be submitted and any work that has been assigned to you, such as forms requiring approval or more information. For more information, see Using the forms in Interact on page 9.
B	**Notifications** – If there are new notifications for you to view, a number is displayed next to the bell icon. Click on the bell icon to view the new notifications. For more information, see Interact notifications on page 18.
C	**User information** – Displays your initials or your avatar if you have one. Click the drop-down arrow next to the icon to change your details or log out from Interact.
D	**Search** – If you know the name of the form, you can start typing it in the search field to locate it.

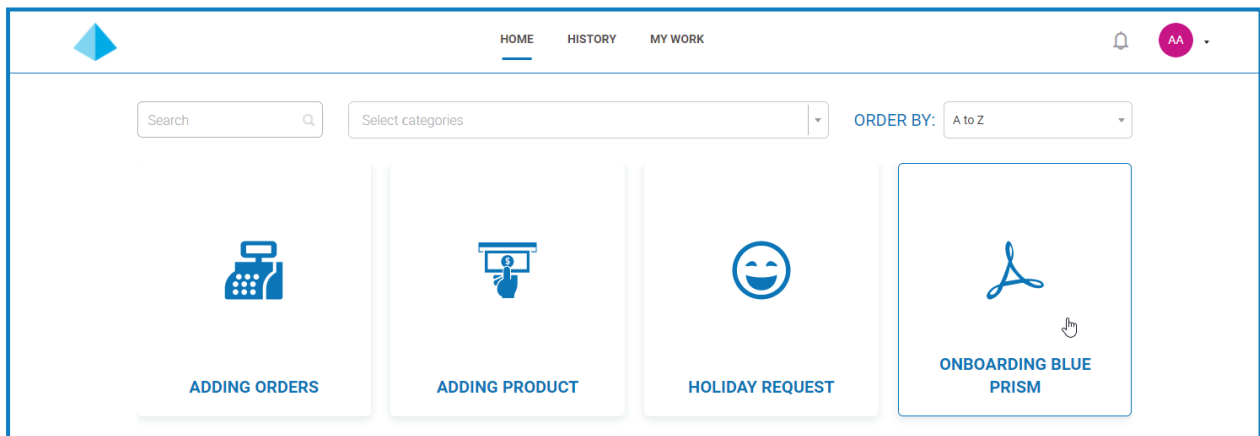| E	**Categories** – The forms on the home page can be filtered by selecting a category from the search bar.	
F	**Order by** – Change the order in which the forms are displayed by selecting a display order using the **Order By** drop-down list.	
G	**Forms** – Each form is represented by a tile. Click on the tile to open the form. The form displays a summary information panel and the fields ready for you to complete. 💡 If the title of the form is truncated on the tile, hover your mouse cursor over a tile to see the full title as a tooltip. For more information, see Submit a form on page 9.	

Using the forms in Interact

Interact forms enable you to collaborate with the Blue Prism Digital Workforce. You can enter essential information through the forms, which the Digital Workforce can then use to complete automated business processes. This section covers:

- Submitting a form – Enter information into a form with Interact and submit it to the Blue Prism work queue.
- Viewing a submitted form – View the submissions and their statuses.
- Approving a form – Approve submissions that have been completed by other Interact users. Your organization may require some of the information to be approved by a manager or another member of your team before the information is processed. You may have permissions to review the submissions and approve, or decline, the submitted form.
- Saving a form as a draft – You can start to complete the information on a form and then save it as a draft to complete it at later time.
- Completing a form from a digital worker – Enter information into forms received from a digital worker.
- Updating submissions – A general overview providing information about what happens to the form after it is submitted.
- Using filters – A general overview of the filters that are available in the History and My Work tabs.

Submit a form

1. On the Interact **Home** tab, click on the required form.

2. Complete the form. If there is more than one page, click **Next** to display the next page.

If an information icon ⓘ appears next to a field label, the information you enter into this field will be purged when the form is submitted and approved. This means that the entered information will only be stored in the Blue Prism database, and any additional storage destinations configured as part of the automation process for the form, and will not be stored in the Interact database or be viewable in the audit logs.

3. Once all pages of the form are complete, click **Submit**.

> 💡 If you want to use the same form again to enter another set of information, set the **Submit another** slider to on.

When the form is submitted, a confirmation notification displays. If you have set the **Submit another** slider to:

- On (a tick displays), you are taken to a new first page of the form, so you can enter the next set of information.

- Off (a cross displays), you are returned to the main Interact screen.

View a submitted form

To see all your submitted forms, select the **History** tab.

The submitted forms appear in the **Submission history** section of the **History** tab.

> ✏️ If a field was identified using the **Make key field** option when the form was designed, the value from this field will appear in the **Key value** column.

If the submitted request needs approving before submission, it is added to the **Awaiting Approval** section of the **History** tab and the approver is notified.
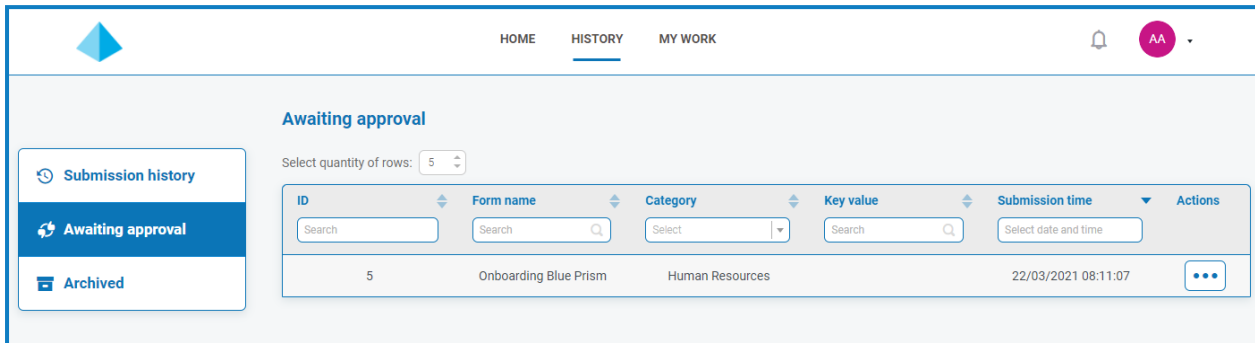
If the form is:

- **Approved** – The form is added to the **Submission history** section of the **History** tab showing the **Status** as **Approved**. A notification is received showing that the submission was approved, which can be viewed by clicking the bell icon.
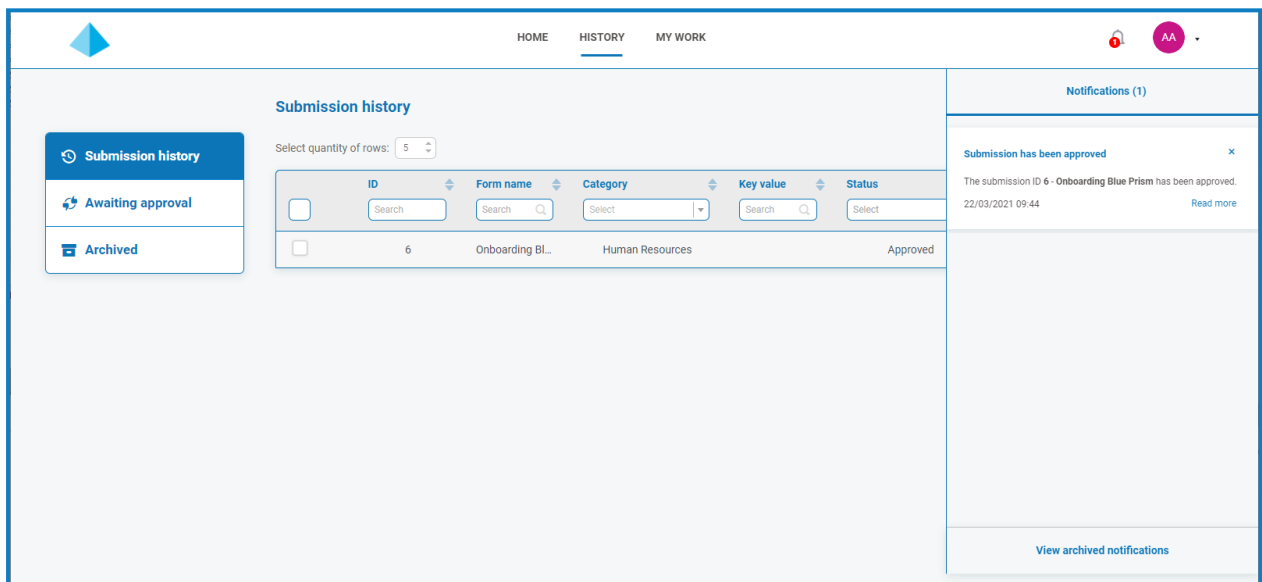
- **Declined** – The form is returned to you as the submitter and is added to the **Submission history** section of the **History** tab showing the **Status** as **Declined**. A notification is received showing the reason for the decline, which can be viewed by clicking the bell icon.
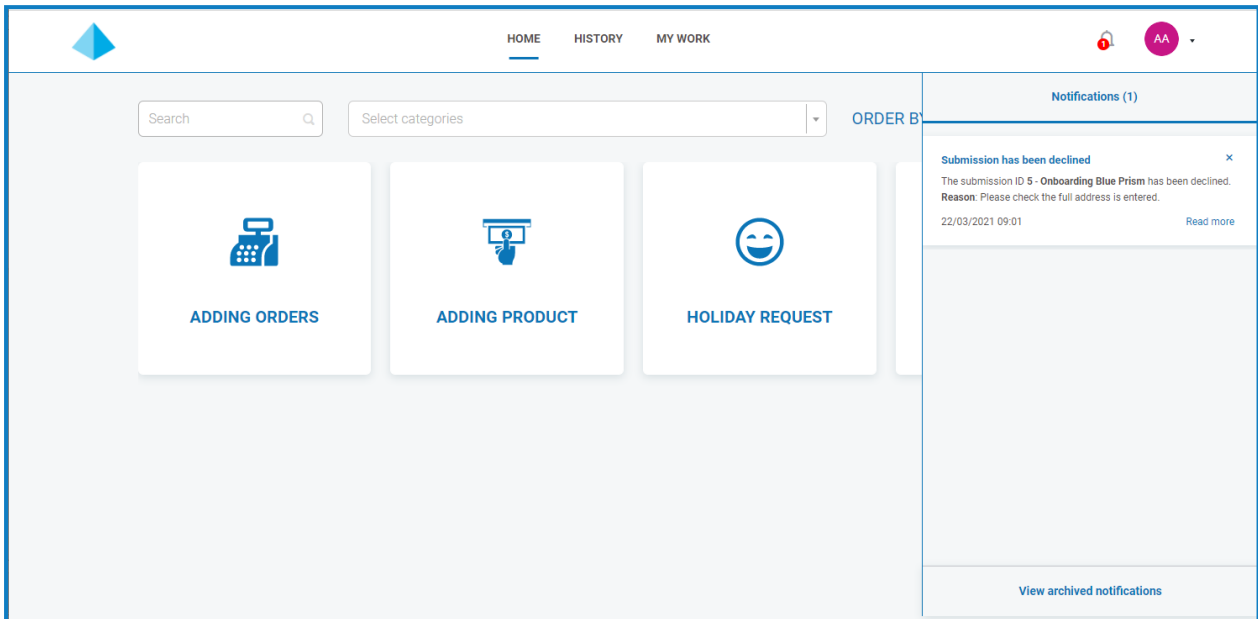
Regardless of the status, if you click the ellipsis (**...**) next to the form, you have three options available:

- **View** – View the form and the entered information.
- **Clone** – This clones the form and allows you to make any changes and then submit it again.
- **Archive** – Moves the form to the Archive folder without resubmitting it.

Approve a form

When forms are submitted for your approval, a notification is received with the approval information, which can be viewed by clicking the bell icon. A flag also displays next to the **My Work** tab and the **Approvals** option on the associated side menu.
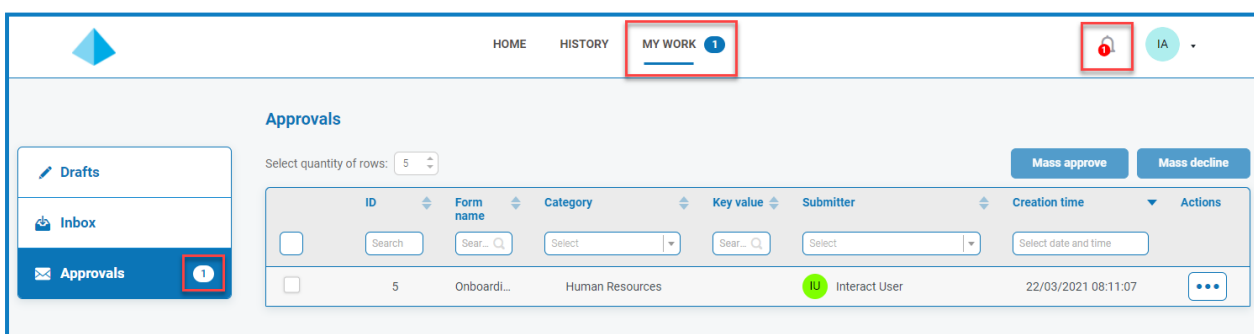
1. To view the forms that require your approval, click **My Work** and then click **Approvals**.

2. To approve or decline an individual form:

    a. Click the ellipsis (**...**) to open the approvals menu for the required form.
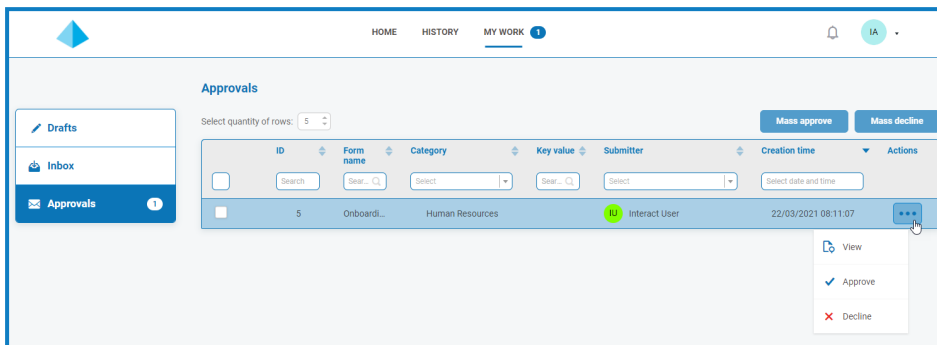
    b. Click the required option:

    - **View** – View the form and the entered information.

    - **Approve** – Approving the request allows the request to be submitted to the queue or email as detailed when the form was created.

    - **Decline** – The request is not submitted to a queue or email. If you decline the form, you are prompted to enter a reason and the form is then returned to the submitter for action.

3. To approve or decline multiple forms:

    > ✎ You should ensure you have reviewed each forms details before you carry out a mass approve.

    a. Select the check box at the start of the row for the forms you want to approve.
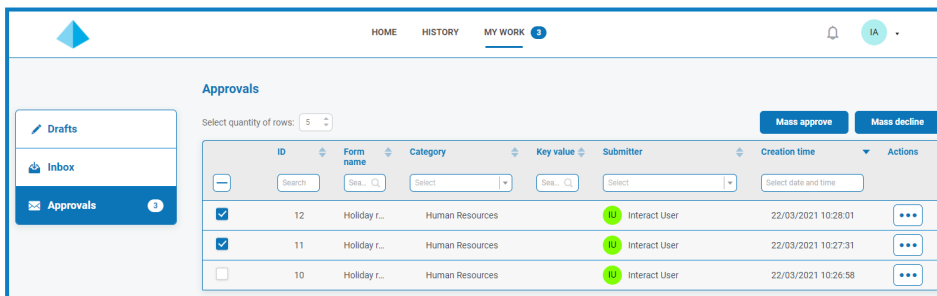
    b. Click **Mass approve**, or **Mass decline** depending on the action you want to take.

    A message displays asking you to confirm.

    c. Click **Yes**.

Save as draft

If you only have some of the information required to complete a form, you can complete the fields you have the information for and then select **Save as draft** to preserve the partially completed form.

> Any information entered into date fields will not be saved when you save as draft. This is due to restrictions that may apply to date fields on the form. When you open a draft, any dates will appear blank and will need to be re-entered.

The information is stored under the **My Work** tab in the **Drafts** section.
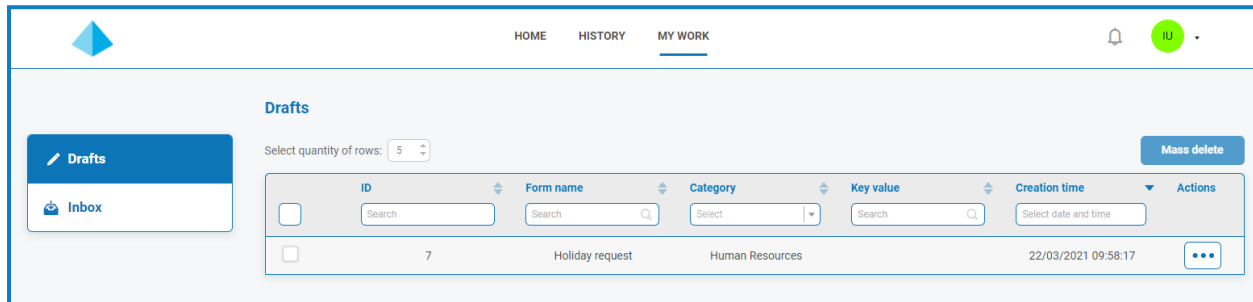
Once you have the missing information, you can complete the form and then submit the request for processing.

Saving a draft enables you to capture the information you have at that time and then, at a later date, open the draft, complete the submission, and submit, or delete the draft if it is no longer required.

Update a submission from a digital worker

As part of automated processes, you may be assigned forms by digital workers that require you to enter or update information. When a form is received, a notification is displayed, which can be viewed by clicking the bell icon. A flag also displays next to the **My Work** tab and the **Inbox** option on the associated side menu.
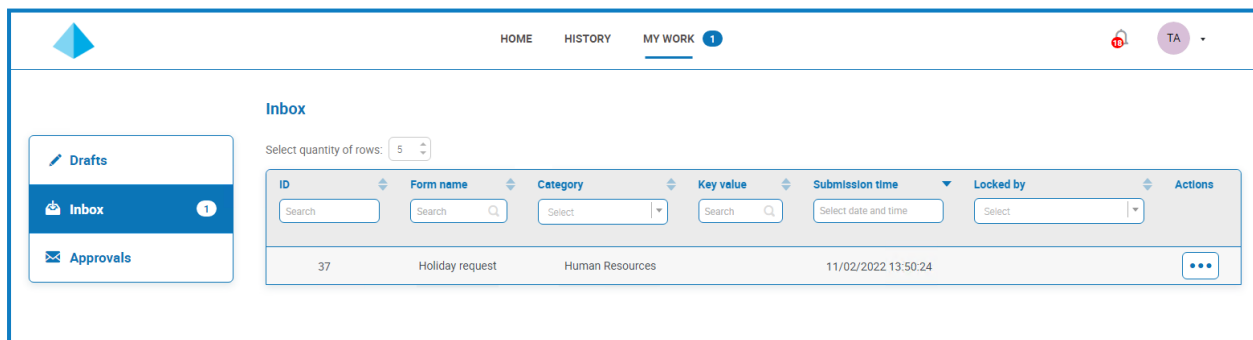

Forms can be assigned directly to you, or to an Interact group that you belong to. If a form is assigned to the group, anyone in that group can update the form. If someone else starts working on it, their name will display in the **Locked by** column in the **Inbox** section.

You can also delete the submission. If you do this and the form has been assigned to an Interact group, it is deleted for everyone in the group.

Enter information in a form

1. Click **My Work** and then click **Inbox**.

2. Find the form you want to update, click the ellipsis (**...**) and then click **Open**.

   The form displays. If the form was assigned to an Interact group, the form is now locked by you and no one else in the group can edit it.

3. Enter the required information.

4. Click **Submit**.

   The form is submitted and either sent for approval or back to the digital worker, depending upon the form setup and automation process.

Delete a form

1. In your Inbox, find the form you want to delete, click the ellipsis (**...**) and then click **Open**.

   The form displays.

2. Click **Delete Submission**.

   A message displays asking you to confirm the deletion.

3. Click **Yes** to confirm the deletion.

⚠ If the form has been submitted to an Interact group, it will be deleted for all members of the group.

Update submissions

The updating of submissions, with information being fed back from Blue Prism, is a dynamic process. You can look at the form as the process is running in Blue Prism, and as the information is updated by the process, the form is automatically updated. The whole mechanism of updating submissions and setting submissions to a different state, such as moving to the Inbox, is detailed in the Interact Web API Service User Guide.

Using filters

In the **History** and **My Work** tabs, most columns are provided with a filter under the column heading – this is either a **Search** text field, or a **Select** field which enables you to select one or more values from a drop-down list. You can you use multiple filters at the same time, and also sort the information by clicking the column name.

To use the filters and sorting:

1. In the column you want to filter by, enter information into the filter in the following way:

   • In a **Search** (text) field, type the information you want to find – these fields perform a partial match and will look for the characters you enter anywhere within the text in that column.

   • In a **Select** (drop-down field), either:

      • Click the arrow and select the value you require, or,

      • Start typing in the field and select the value you require.

   Some **Select** fields allow you to select more than one value, such as the **Category** filter. For example:

   Multi-select fields display the options as tags and a scroll bar may display:

   Single-select fields display the option without any additional visual indicators:
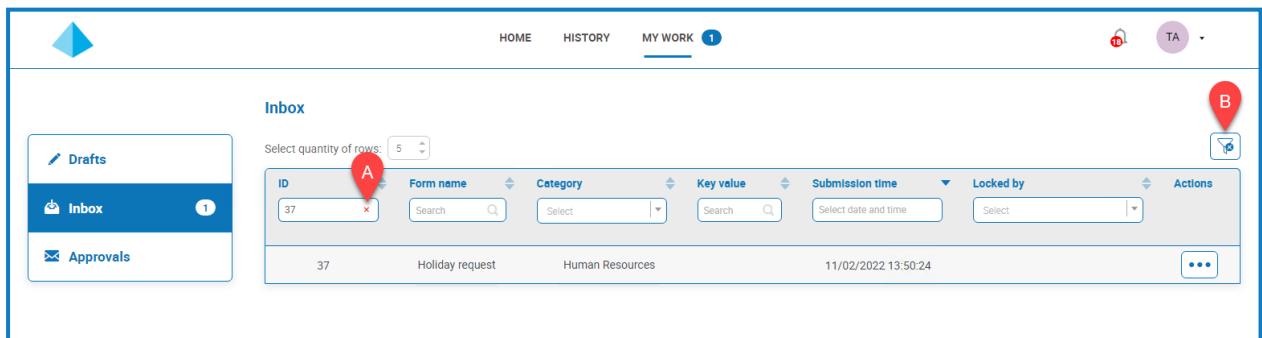

   The column is filtered immediately upon entering the information.

2. Add filters to any additional columns you require.

3. To change the sort order of a column, click the column heading.

To remove the filters, either:

A. Click the red cross at the end of the filter field to remove that specific filter.

B. Click the remove filters icon to remove all filters.

Interact notifications

There are several in-built triggers that notify users about specific events. If there are new notifications, the bell icon is annotated with the number of notifications. To view these notifications, click the bell icon located in the top-right corner of your screen. If you have no notifications, the notification panel will be empty.
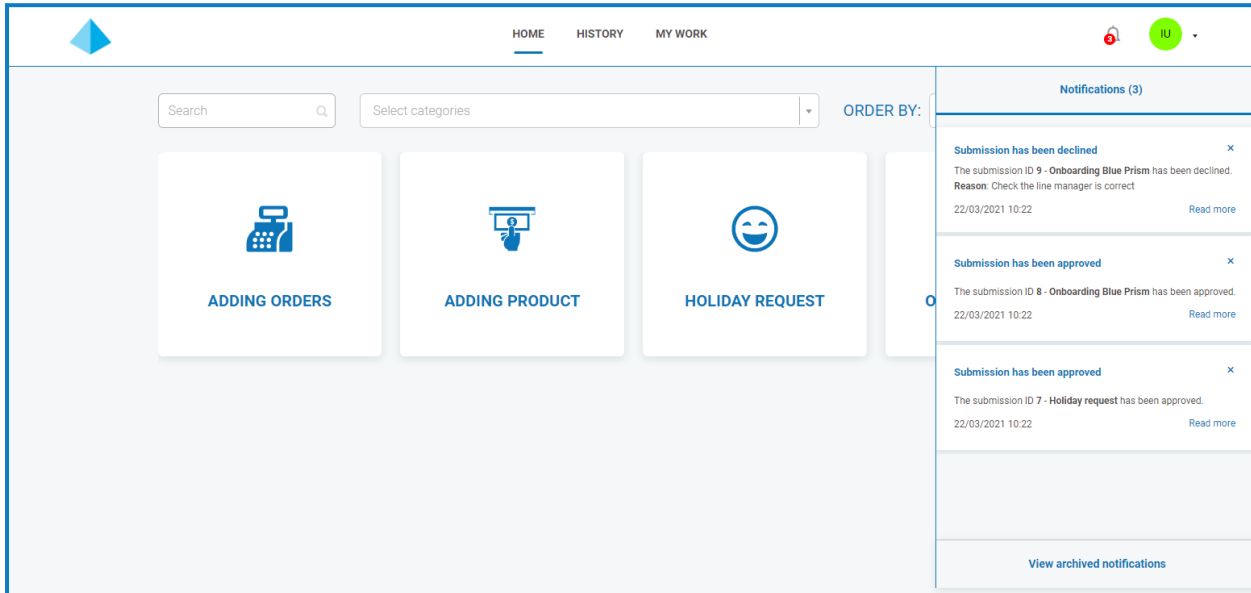
Notification types

The notification types in Interact are described below.

Approval required for submission

Trigger:	A user has completed and submitted a form which requires approval.
Recipients:	Interact users who have Approver rights and have been identified as the approvers for that category role, or specific form.

Digital Worker has assigned submission to your group

Trigger:	A Digital Worker has assigned a submission to an Interact group.
Recipients:	Members of the Interact group.

Digital Worker has assigned you an Interact form

Trigger:	A Digital Worker has created a submission and assigned it to a user.
Recipients:	The user who has been assigned the form.
	If you receive this notification but cannot see the form in your Inbox, you do not have access to the Interact group associated with the form. Contact your Hub administrator for access.

Interact cannot connect to the Blue Prism work queue

Trigger:	Interact cannot find the work queue to send the submission to.
Recipients:	The user who submitted the form.
	✎ If you receive this notification, contact your Hub administrator with the form name (displayed in the notification message) so that they can investigate. The work queue the submission uses is defined by the form.

Submission has been approved

Trigger:	The approver has approved the form and it has moved to be processed by the automation.
	The form may be have been approved directly, or may have been part of a mass approval.
Recipients:	The user who submitted the form.

Submission has been declined

Trigger:	The approver has rejected the form and it has not progressed any further.
	The form may be have been declined directly, or may have been part of a mass decline.
Recipients:	The user who submitted the form.

User has completed submission raised by Digital Worker

Trigger:	A user in the Interact group has completed the required action on the submission that was assigned to the group by the Digital Worker.
	✎ The form is moved from the My Work tab to the History tab for all users in the Interact group.
Recipients:	Members of the Interact group.

User has deleted submission raised by Digital Worker

Trigger:	A user in the Interact group has deleted the submission that was assigned to the group by the Digital Worker.
	✎ The form is deleted for all the users in the Interact group.
Recipients:	Members of the Interact group.

For more information about approvals, see Approve a form on page 13.

Archive a notification

You can move the notifications into the archived notification area in two ways:

- Click the X in the corner of the notification to remove it from the notification list and into archived notifications.
- Click **Read more** to read the notification information. This displays a message box with the details. When you close this, the notification is moved to archived notifications.

View archived notifications

To view the archived notifications, click the bell icon and then click **View archived notifications**.
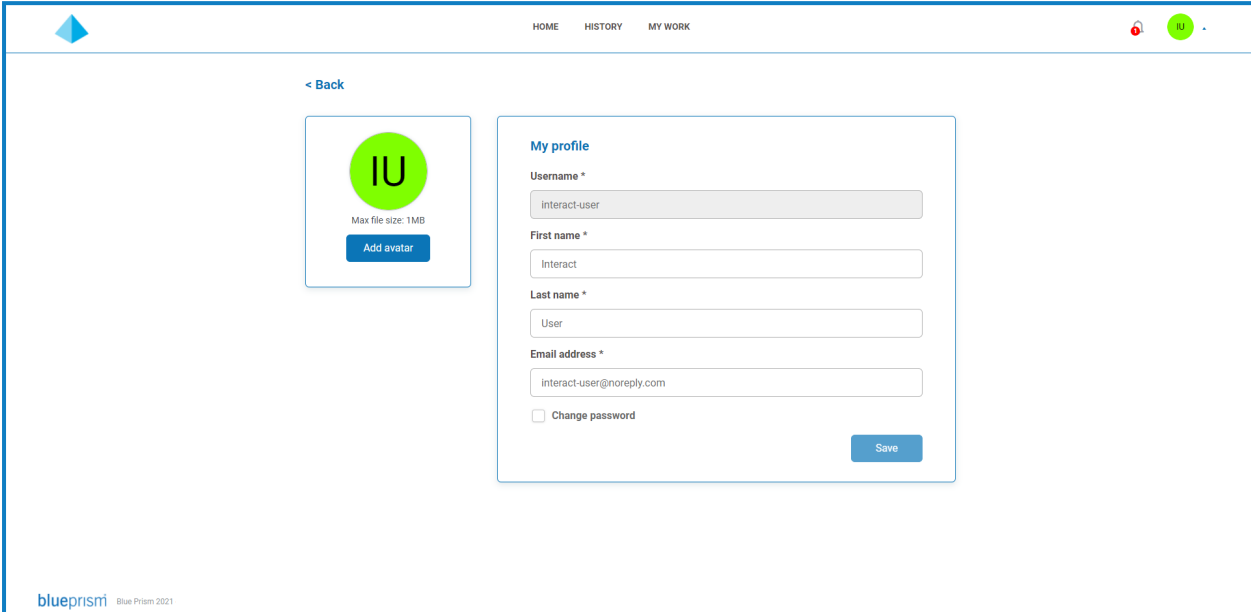

You can sort and filter the notifications using functionality in the column headings.

Updating your profile

To view your profile, click the drop-down arrow next to the user icon and select **Edit profile**.

Your profile page enables you to:

- **Change your avatar** – By default, your initials are displayed, however, you can upload an image of your choice.

- **Update your user information** – If your user account has been configured to use native authentication, you can change your first name, last name, and email. If your user account has been configured to use Active Directory authentication, you will not be able to change these details.

- **Change your password** – If your user account has been configured to use native authentication, you can change your password. If your user account has been configured to use Active Directory authentication, this option will not be available.

Change your avatar

1. On your Profile page, click **Add avatar**.

   The Open dialog box displays.

2. Select your image and click **Open**. Images cannot be greater than 1 MB in size.

   The dialog closes and the image displays as a preview in the Add avatar section.

3. Click **Save**.

   The image is applied and appears in the top corner of the screen as your user icon.

   > The image is also applied against your user information within Hub. If you also have access to Hub, you will see it as your user icon when you next log in.

Update your information

If your user account has been configured to use Active Directory authentication, you will not be able to change these details. These details are managed in Active Directory and maintained by your organization.

1. On your Profile page, update your first name, last name, or email address as required. You cannot change your username.

2. Click **Save**.

   Your information is updated and a message appears confirming the update.

   > 🖋 This also updates your user information within Hub .

Change your password

You can only change your password if your user account has been configured to use native authentication.

1. On your Profile page, select **Update password**.

   The change password fields display.

2. Enter your current password.

3. Enter and repeat your new password.

4. Click **Save**.

   Your password is changed.

Troubleshooting

I can't see any forms when I log into Interact

There are several reasons why you might not see any forms on the Home page in Interact, these include:

- No forms have been published to Interact yet.
- You have not been assigned to a role that has forms associated with it.

To resolve the issue, you will need to contact your Interact administrator.

I can't see the form I need

The reasons for this are similar to I can't see any forms when I log into Interact. It is likely that one of the following is the reason:

- You have not been assigned to the role that the form is associated with.
- The form has not been published to Interact.
- The form has not been published to the role that you are a member of.
- The form you were previously using has been retired or removed from the system by a form designer or an Interact administrator.
- The environment that the form depended on has been removed, therefore the form has been hidden.

In addition, if you were using a form in a test environment and now expect to see it in a live environment, but it is not showing, it may be that the version number of the imported form has not been updated by the form designers. By default, forms are imported with a version of 0.0 which Interact considers to be a draft version so will not display the form. Your Interact administrator or form designer must update the version number of the form to a version higher than 0.0 to make it available in the web application.

If you cannot see the form you require, contact your Interact administrator.

Submit, Approve, or Clone buttons are not active

If the **Submit**, **Approve**, or **Clone** buttons are not active on a existing submission (such as a submission saved in **Draft**, or a submission requiring approval), hover your cursor over the button to view the tooltip. If a message displays informing you that the corresponding environment has been removed, the button has purposefully been deactivated and the submission cannot be processed any further using automation.

Contact your Interact administrator and give them the form name so they can investigate, and assign a new environment to the form. This will re-enable the buttons. Alternatively, delete or decline the submission, and enter the information again using a new form. If the required form is not available, contact your Interact administrator.