Blue Prism Desktop 1.0

User Guide

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About Blue Prism Desktop

Blue Prism® Desktop is an application that allows you to run pre-configured Blue Prism processes which often involve the automation of other software applications on your computer. You can choose from a list of processes that have been made available to you in Blue Prism Desktop. Some of these may prompt you to enter additional information at the start of, or during, the process.

On-screen messages will guide you as you use Blue Prism Desktop, and will tell you what to do next if something doesn't work as expected. If you need more help with Blue Prism Desktop, please contact your system administrator.

About this user guide

Find out how to use Blue Prism Desktop:

- Getting started with Blue Prism Desktop on the next page – Connect and log into Blue Prism Desktop.
- Run a process on page 15 – Use Blue Prism Desktop to run an automated process.
- Process library on page 23 – View and run the processes that have been made available to you.
- Session history on page 24 – View details of all the processes you have run, including those that generated an error message.
- Settings on page 26 – Configure your connections and credentials.

Glossary of terms

These are some of the key terms you will need to understand when using Blue Prism Desktop and when using this guide.

Term	Description
Connection	The set of values that point to the required components for Blue Prism Desktop, for example, URLs for the components that authorize you when you log in, and that allow you to access all the processes you can run. Each Blue Prism Desktop connection has a unique name.
Credential	The security information that allows a Blue Prism Desktop process to automate another software application on your computer to complete a task. A credential consists of a unique identifier, a username, and a password.
Environment	The combination of components which enables Blue Prism Desktop to function.
Mid-process parameters	Additional information that you may need to enter into Blue Prism Desktop part-way through a process. The process will pause temporarily to enable you to enter the information.
Process	Pre-defined steps automated by Blue Prism that carry out a task on your computer. Some Blue Prism Desktop processes will interact with other applications on your computer (for example, Microsoft Excel or Outlook, or a web browser), in order to complete the task.
Start-up parameters	Additional information that you may need to enter into Blue Prism Desktop at the start of a process, before it starts to run.

Getting started with Blue Prism Desktop

This section tells you how to:

- Launch Blue Prism Desktop, connect to an environment, and log in.
- Edit a connection before login, and import or create a connection if one is not available. You may be expected to edit and update your own connections, or this may be managed for you via connection files that you import. This depends on the policy within your organization.
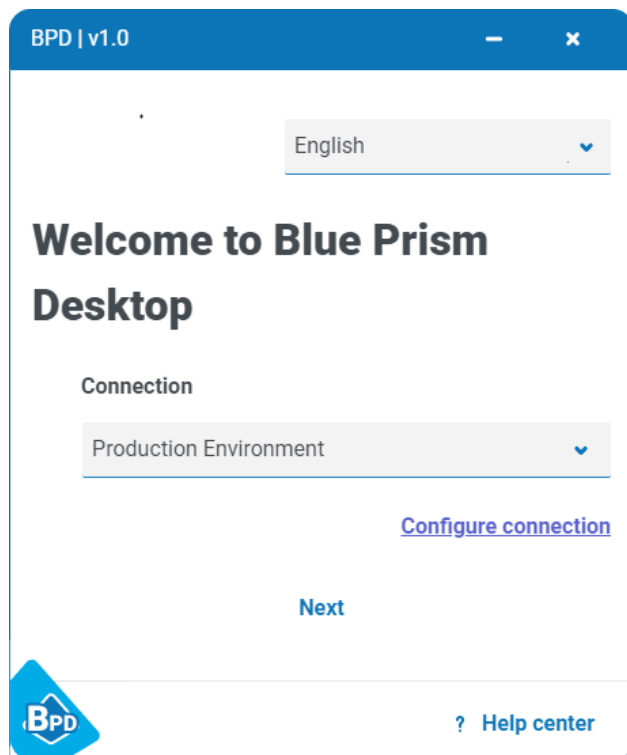
> If, after following these instructions, you cannot log into Blue PrismDesktop, please contact your system administrator for assistance.

Launch Blue Prism Desktop

To launch Blue Prism Desktop:

- Click the Blue Prism Desktop shortcut on your computer desktop, or
- Search for Blue Prism Desktop from the Windows Start menu.

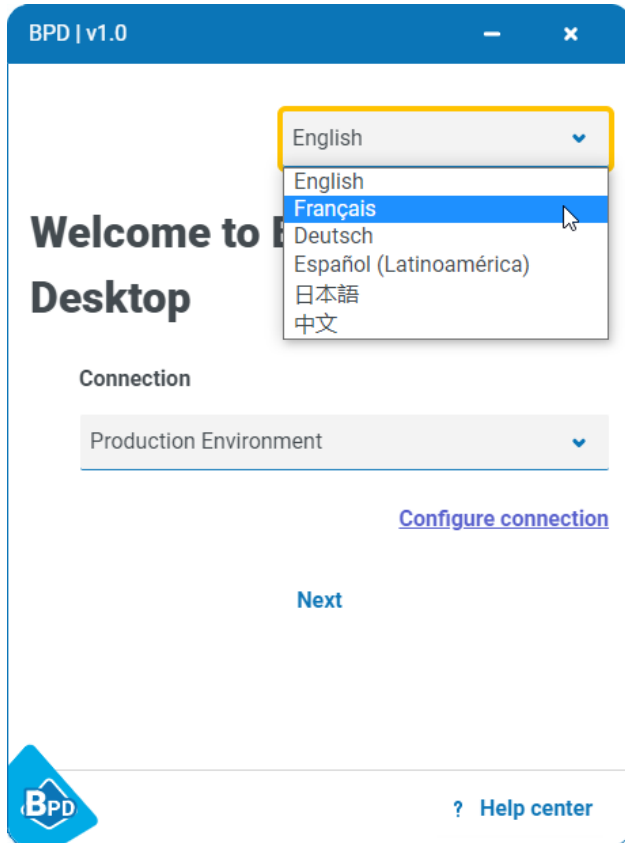The Welcome to Blue Prism Desktop screen displays.

> If you don't have any connections currently configured, the Connection drop-down will be empty, and you will need to import or create a connection before you can proceed, see Import a connection on page 9 and Create a new connection on page 10.

Change the language

The default language of the Blue Prism Desktop interface is based on your operating system settings. If this language is not supported by Blue Prism Desktop, English is used as the default.

If required, you can manually change the language using the drop-down list on the Welcome screen:

Connect and log into Desktop

Before starting, please check that you have the following information:

- The name of the connection you need to use.
- Your Blue Prism Desktop username and password, if single sign-on is not used for Blue Prism Desktop in your organization.

> If you don't have all the necessary information, please contact your system administrator for assistance.

1. Select the connection you want to use for this session from the **Connection** drop-down.

   If you cannot see any connections or the one you require is not listed, you can import or create a connection. See Configure connections (before login) on page 9 for more information.

2. Click **Next**.

    The Login screen displays the login options available to you. The **Log in using Active Directory** option only displays if Active Directory authentication has been configured in your environment.

> ✎ The language drop-down on the Login screen only applies to the Login screen itself. To change the language of the Blue Prism Desktop interface, you must use the language drop-down on the Welcome screen, see Change the language on the previous page.
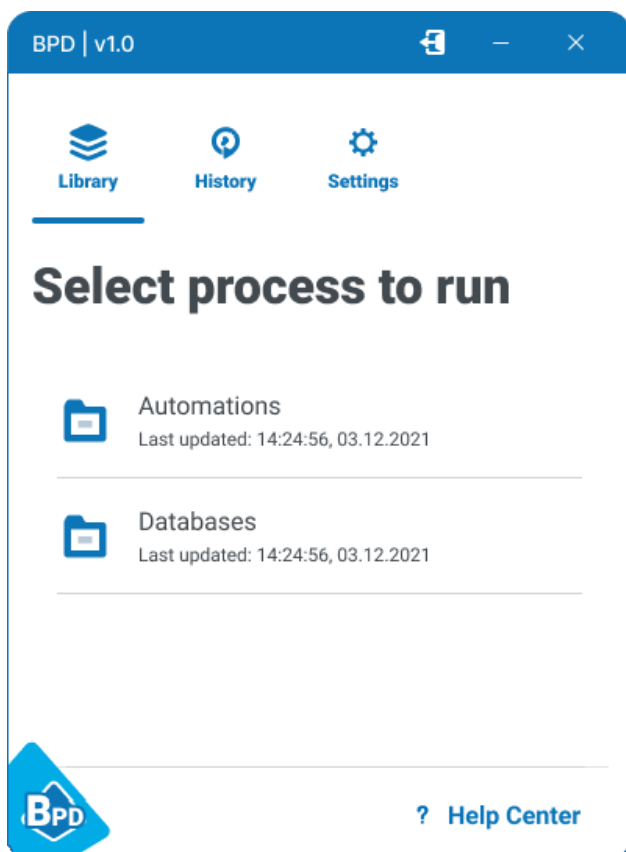
If you have forgotten your login details, click **Forgot password** and enter your email address on the Forgot password screen. You will then be sent an email containing instructions on how to reset your password.

> ✎ If you experience any other problems during login (for example, if logging in via Active Directory fails), please contact your system administrator for assistance.

3. Log in using one of the following options:

   - Enter your username and password and click **Log in**.

   - Click **Log in using Active Directory**. This uses single sign-on, so you do not need to enter any credentials.

The Library tab displays, listing all the processes available for you to run (these may be listed individually or organized in folders).
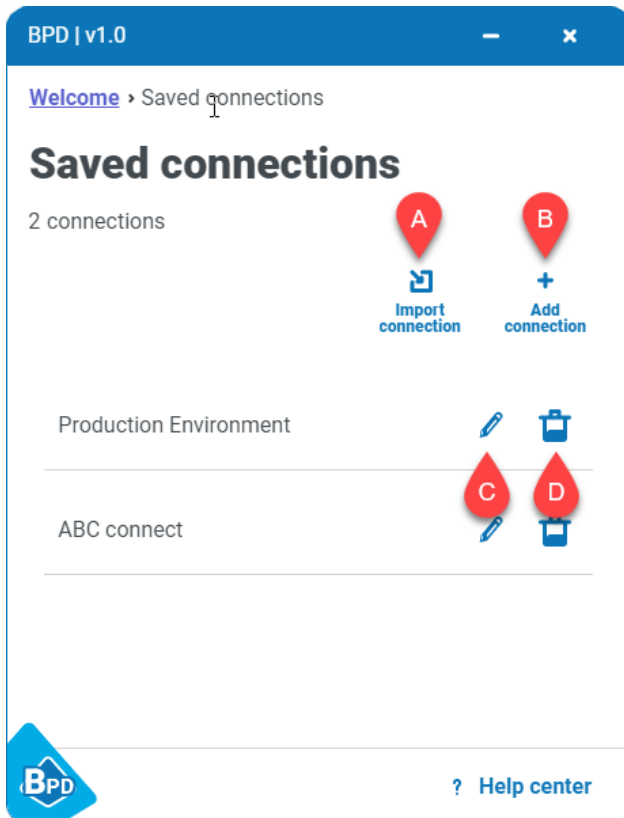
Configure connections (before login)

You can add a new connection, or multiple connections, by importing a connection configuration file via the Welcome screen. You can also configure connections from the Settings tab after logging in, see Configure connections (after login) on page 26.

Alternatively, you can create a new connection yourself using the details of a Desktop environment, if known. You can also edit and delete connections, if you require assistance, please contact your system administrator. The actions you are permitted to perform on connections will depend on your organization's policy, so please contact your system administrator for assistance.

To configure a connection, click **Configure connection**. The Saved connections screen displays.

The following options are available:

A. **Import Connection** – Add one or more new connections by importing a connection configuration file usually supplied by your system administrator, see Import a connection below.

B. **Add connection** – Add a completely new connection, see Create a new connection on the next page.

C. **Edit connection** – Edit the configuration details of this connection, see Edit a connection on page 14.

D. **Delete connection** – Delete this connection, see Delete a connection on page 14.

Depending on your organization's Blue Prism Desktop environment configuration, you might only have one available connection, or, if you have access to more than one environment, you can have multiple connections available for your account.

Import a connection

You can add connections by importing a connection configuration file. This is a file normally supplied by your system administrator that contains the configuration details of one or more connections. When you import it, these connections are added to your list of saved connections.

> ⚠ Connection names must be unique, and are case-sensitive. If you import a connection with the same name as an existing one, it will overwrite the existing connection. You will not be asked to confirm the import.

1. On the Saved connections screen, click **Import connection** and navigate to the connection configuration import file.
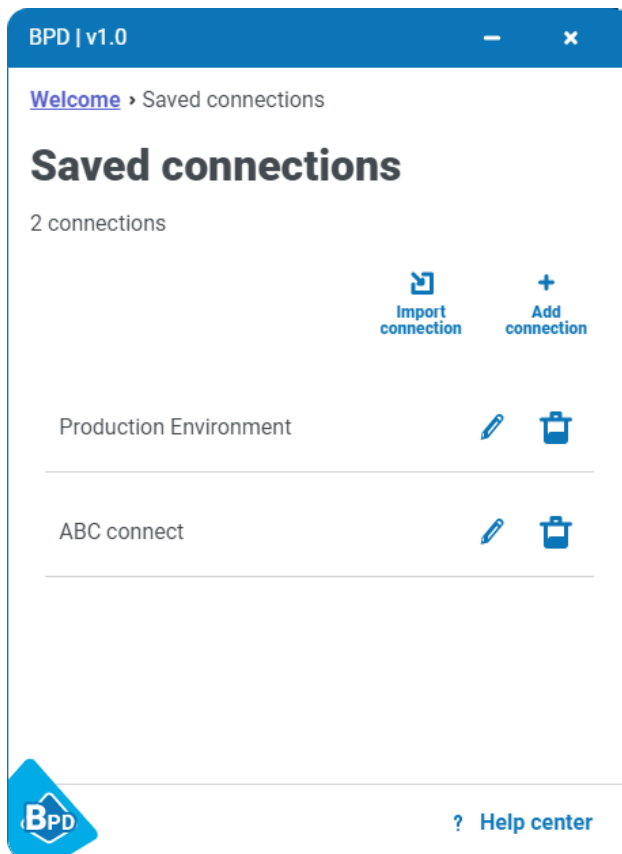
2. Click **Open**.

   The connection configuration file is uploaded. The connections configured in the file (there can be more than one per file) are added to your list of saved connections. You can now select the required connection from the Welcome screen and log in.

Create a new connection

You can create a connection by entering the connection details into Blue Prism Desktop. These details will be supplied to you by your system administrator if required.

1. On the Welcome screen, click **Configure connection**.

   The Saved connections screen displays.

2. Click **Add connection**.

   The Create new connection screen displays.

3. Enter the connection details, as prompted. All the fields are mandatory.

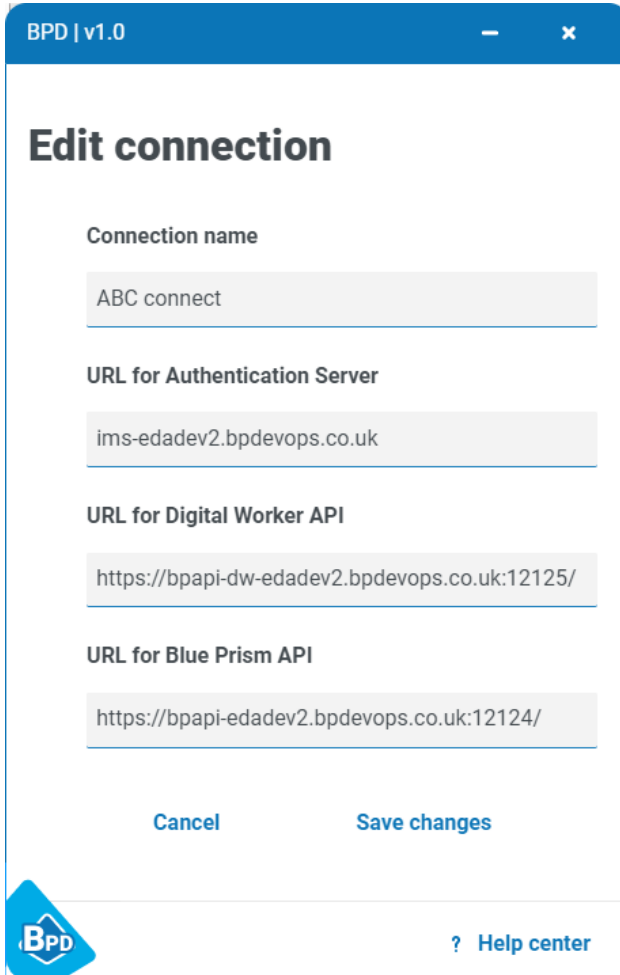| Field name	Information required
Connection name	Enter a name for this connection. Connection names must be unique, and are case-sensitive. ✎ If you try to create a new connection with the same name as an existing one, a warning message displays and you cannot save the connection.
URL for Authentication Server	Enter the Authentication Server URL, but do not include https:// in the URL. ⚠ To ensure a secure connection is used, all Authentication Server URLs must include https://. This has therefore been hard-coded into the field and does not need to be entered.
URL for Digital Worker API	Enter the URL of the Digital Worker API to which you want to connect.
URL for Blue Prism API	Enter the URL of the Blue Prism API to which you want to connect.

4. Click **Create** to add the new connection.

    The connection is created and displays on the Saved connections screen.

Edit a connection

1. On the Saved connections screen, click the Edit connection icon ✎ .

    The Edit connection screen displays.

2. Edit the connection details as required.

3. Click **Save changes**.

    The connection is updated and the Saved connections screen displays.
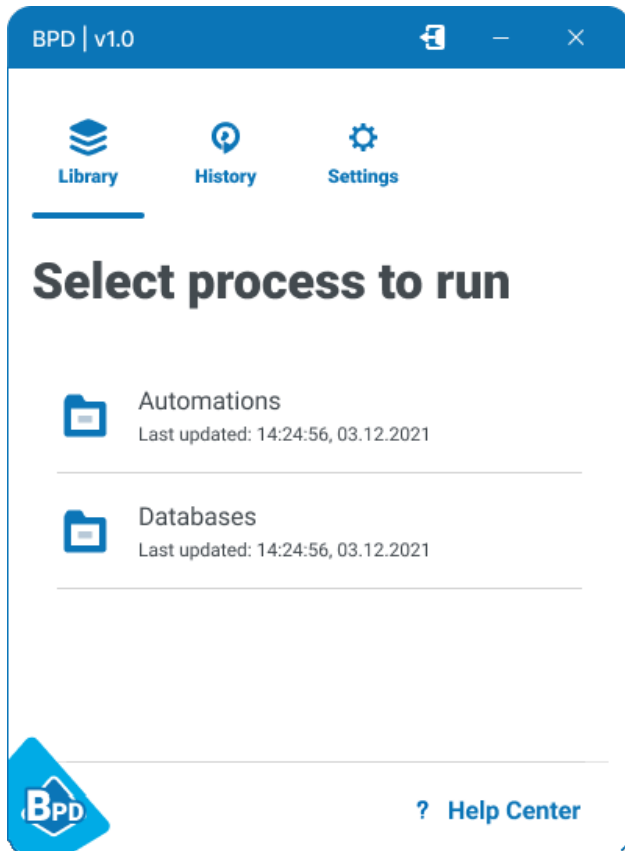
Delete a connection

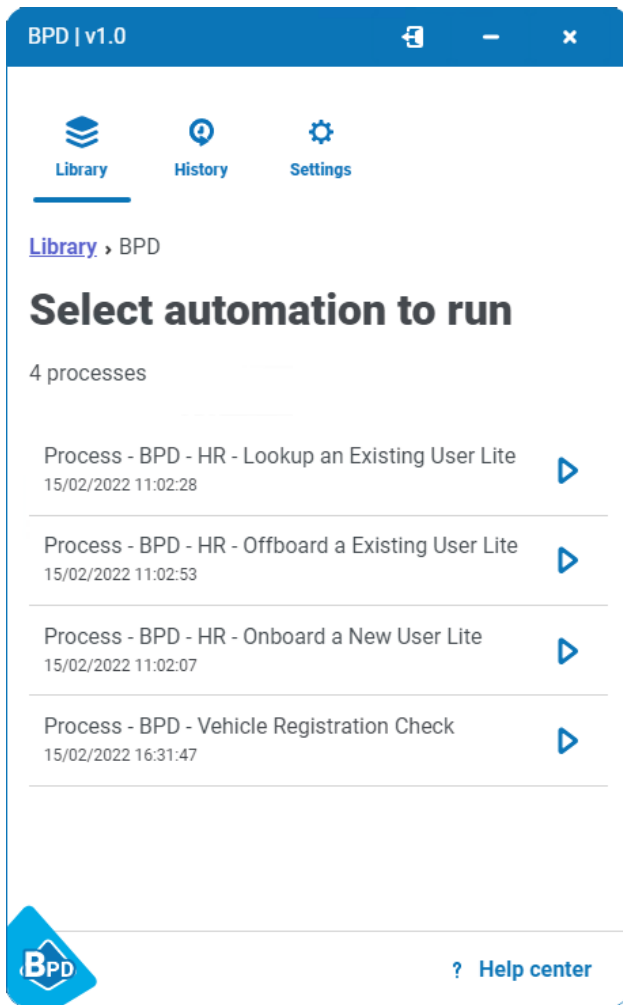> ⚠ This action deletes the connection from your account and cannot be undone.

1. On the Saved connections screen, click the Delete connection icon 🗑 .

    A message displays asking you to confirm the delete.

2. Click **Yes, delete**.

    The connection is deleted from your account and the Saved connections screen displays.
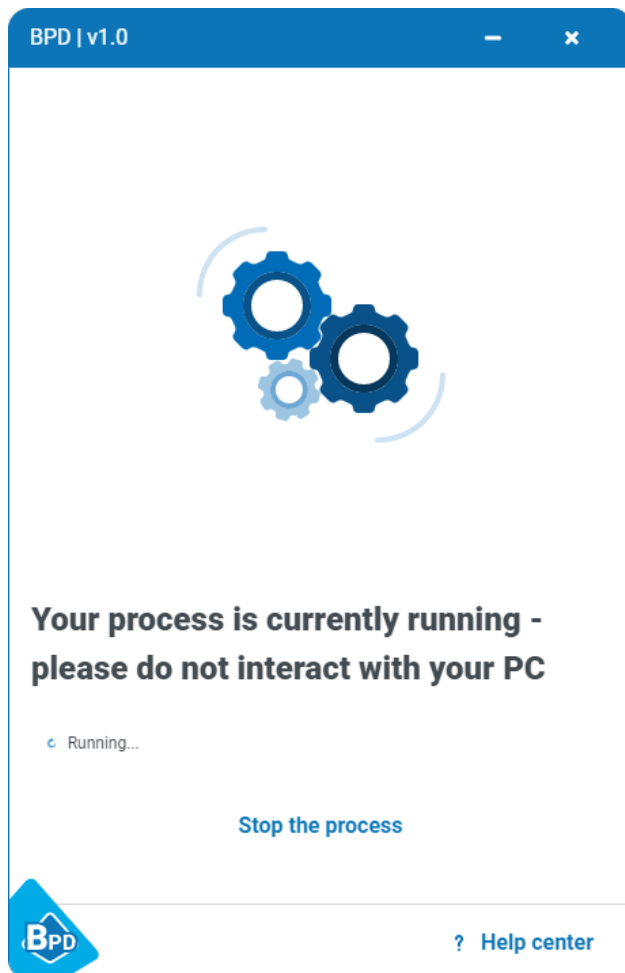
Run a process

When you have successfully logged into Blue Prism Desktop, the Library tab displays (see Process library on page 23), and you can now run a process.

1. Click a folder to expand it and display a list of processes.
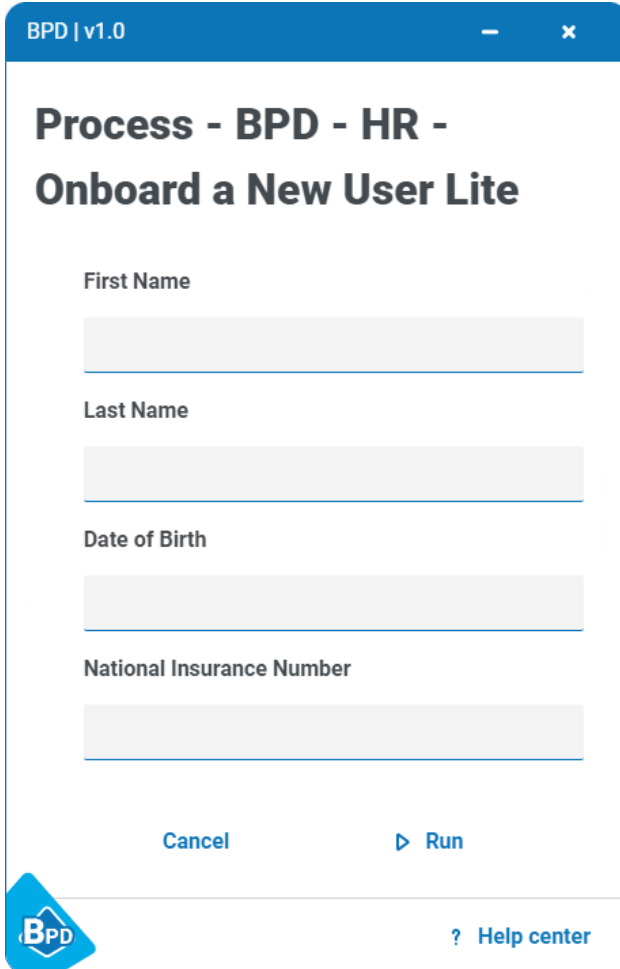
2. Click the ▷ (Run) icon to run a process. Some processes will require you to enter additional information, either before the process can run, or part-way through the process, see Enter additional information on page 21.

- If the process does not require you to enter any additional information, a message displays to inform you that the process is running.

If necessary you can click **Stop the process** to abandon the process and return to the process library. If you do this, any updates that the process has already made will still be applied.

- If the process requires you to enter information before it can run (known as start-up parameters), this will now be requested.

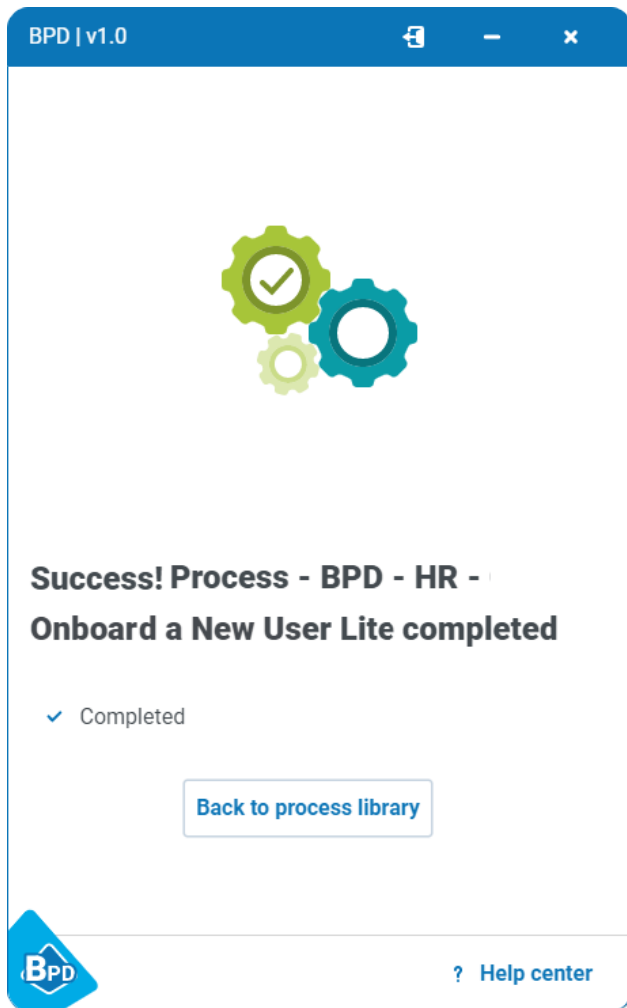Enter the requested information and click ▷ **Run**.

A message displays to inform you that the process is running (see above).

- If the process requires you to enter information part-way through (known as mid-process parameters), this will be requested at the appropriate point, see Enter additional information on page 21.
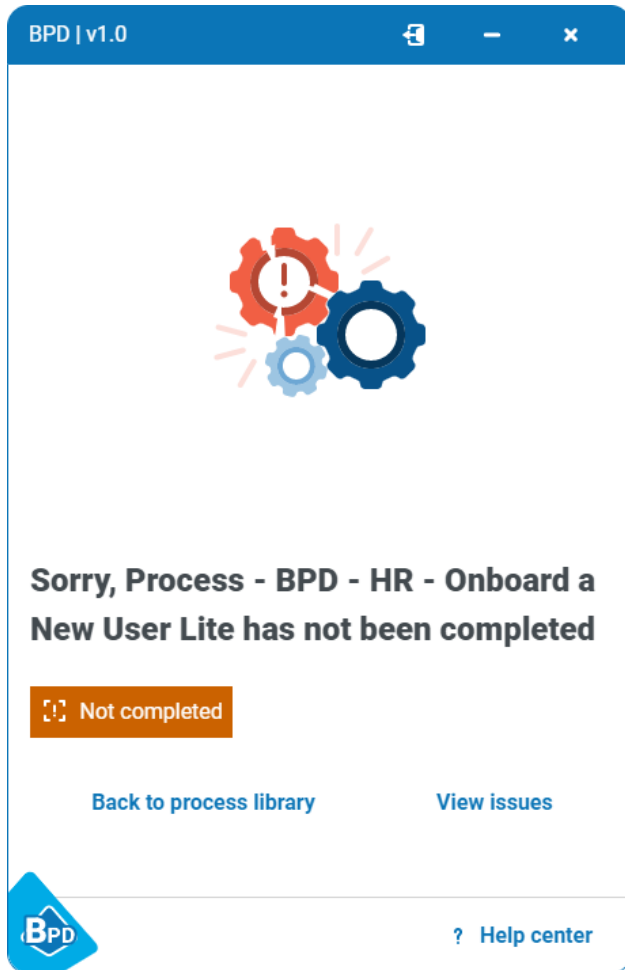
Enter the requested information and click **Submit**, or click **Cancel** to abandon the process and return to the process library.

> ✍ Depending on what the process is designed to automate, you may notice one or more applications or a browser being launched on your computer while the process is running. You will not usually be able to interact with the application or browser that the current automation process is interacting with. See Interacting with your computer while a process is running on page 22.

When the process has completed, a success message displays.

If the process fails to complete (for example, if you have entered incorrect information), an error message displays, and the failure is recorded in the session list on the History tab, see Session history on page 24.

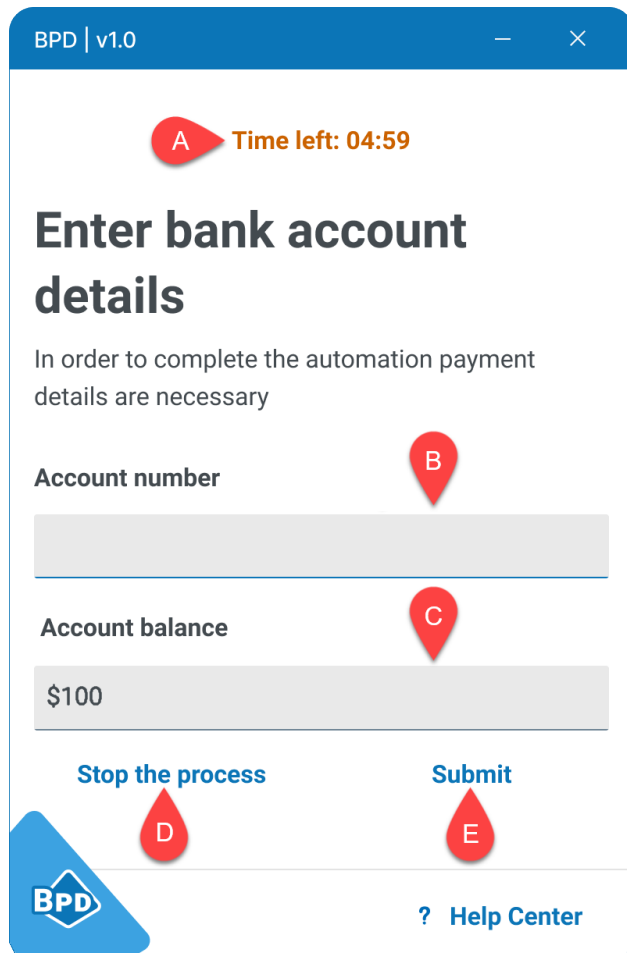To find out more about the failure reason, click **View issues**.

If you need help to fix the problem, you should give this information to your system administrator. They are able to view a complete session log with more detailed information about all the processes that you have run, any additional information you entered, and details of why a process failed.

All the processes you have run are listed on the History tab, see Session history on page 24.

Enter additional information

If the process needs extra information to run, fields will display for you to complete. This might be before the process runs (start-up parameters), or part-way through the process (mid-process parameters).

> ✏️ If fields are left blank, the process will continue with blank values unless default values have been added to the process, in which case the process will use the default values. However, if there are Date, DateTime, or Time parameters with no default value, then the current date/time values are used.

A. **Time limit** – Indicates that there is a preset time limit for you to finish adding or editing the information on this screen. If you don't finish and click **Submit** within the time limit, the process will continue with blank values unless default values have been set by your administrator, in which case the process will use the default values.

B. **Empty field** – Enter the required information.

C. **Field with content** – Already contains information. Some pre-filled fields can be edited and some are non-editable, depending on the process design.

D. **Stop the process** – Abandon the process and return to the process library. Any updates that the process has already made will still be applied.

E. **Submit** – Submit the displayed information and continue to run the process.

The entries that you make in the fields are recorded in the session log, so can be viewed by your system administrator if needed. If the process required start-up parameters, you can see the entries you made on the History tab, see .

Stop a process

Click **Stop the process** if you need to stop a process while it is running. The process is abandoned, the **Library** tab displays, and your stop action is recorded on the History tab, see .

You can re-run the process from the Library tab if required.

> ⚠️ You should only stop a process while it is running if absolutely necessary, because any updates that the process has already made will still be applied. Your system administrator will then need to investigate any potential issues.

Interacting with your computer while a process is running

There are limits to some of the interactions you can make with your computer while a process is running (for example, mouse clicks and key strokes), depending on which applications are being automated (used) by the process.
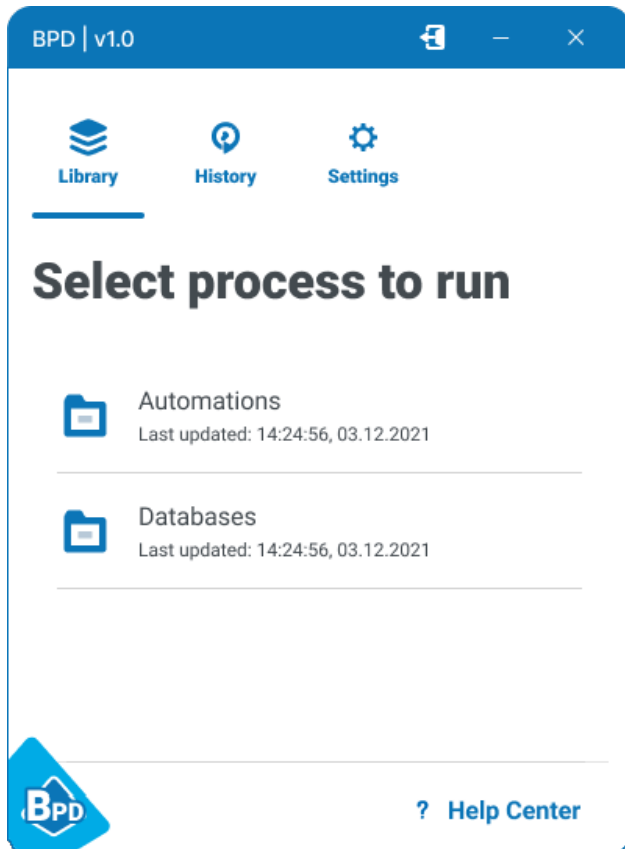
- If the process is automating a Windows application, the application being automated is usually blocked. You can use all other Windows applications on your computer as normal.

  ⚠ If you already have Microsoft Word, Excel, PowerPoint, or Outlook open on your computer when a Blue Prism Desktop process automates the same application, interactions with that application may not be blocked. Any interactions that you make with the application could cause the process to run with incorrect data or to fail, so it is recommended that you save and close Word, Excel, PowerPoint, or Outlook before running a process that automates these applications.

- If the process is automating a Java or browser application, all applications of that type on your computer are blocked. However, only one type of browser window is blocked so, for example, if the process is automating a Chrome browser, you will be able to use Edge or Firefox as normal.

Process library

The **Library** tab displays all the processes that you can run, organized into folders.

Click a folder to open it and display the list of processes in the folder. The number of processes in the selected folder is indicated above the list, and a scroll bar displays if there are processes that don't fit on the screen. You can use the breadcrumbs at the top of the tab to navigate back through the folder structure.
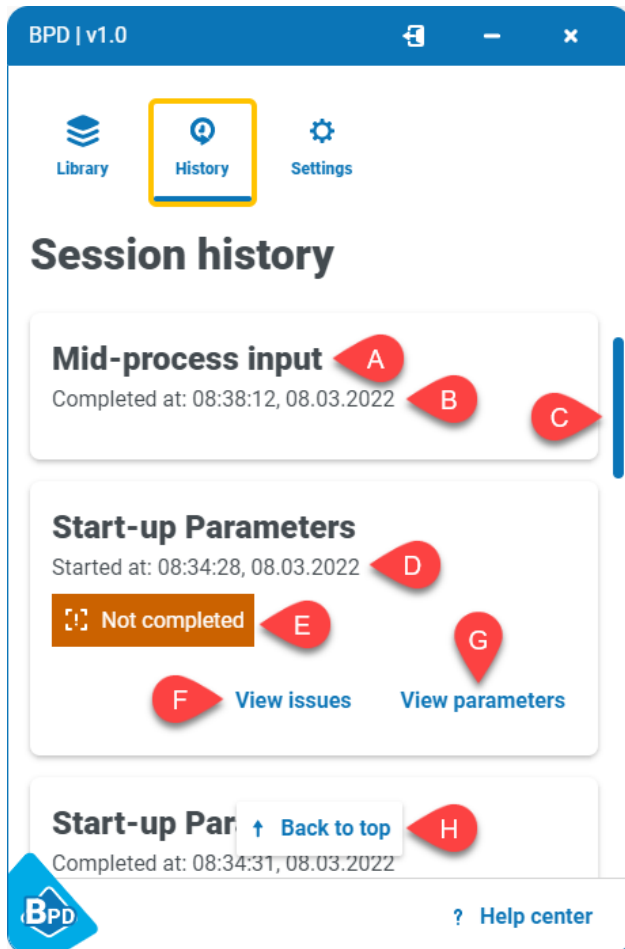
> ✎ If there are no processes available for you to run or the library cannot load, please contact your system administrator for assistance.

For more information, see Run a process on page 15.

Session history

Select the **History** tab to see information about the processes you have run. A list of historical processes displays, in date/time order, starting with the most recent. Each entry in the list is one session, and represents a single run of a process. Initially your 10 most recently run processes are listed on the tab, and more are loaded as you scroll down.

The amount of history available to you depends on the data retention policies in place for Blue Prism Desktop session management at your organization. For example, you might be able to see all the sessions you have ever run, or the list might be limited to a fixed time period, such as the last six months.
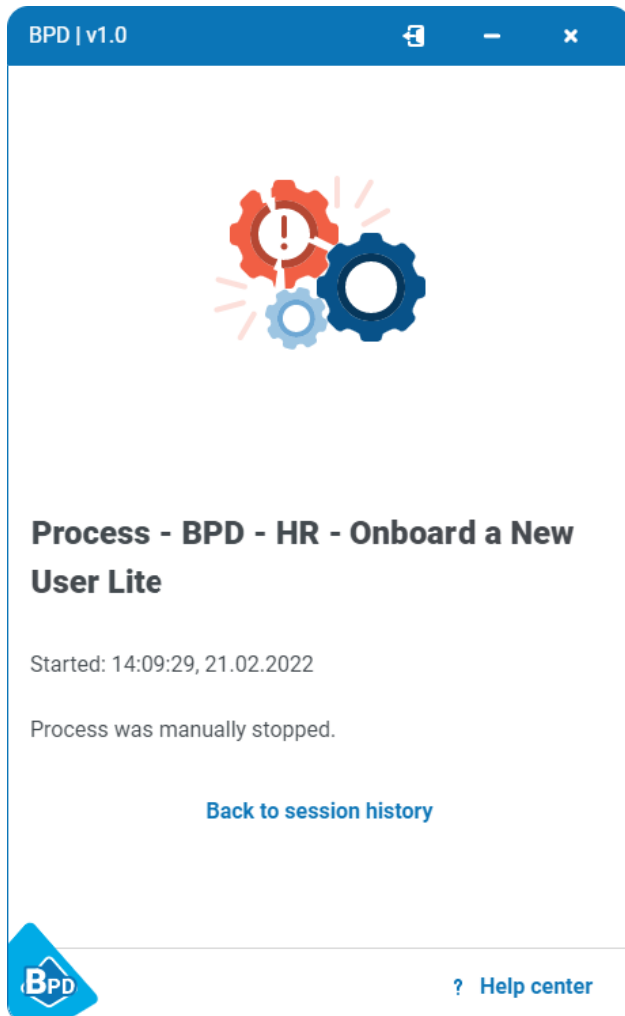

The following information and options are available:

A. **Process name** – The name of the process run in the session.

B. **Completed at** – The time and date this process finished running. This only displays if the process ran successfully.

C. **Scroll bar** – A scroll bar displays when there are more records that can fit on screen. As you scroll down, more historical sessions are loaded into the list in date order.

D. **Started at** – The time and date this process started running. This only displays if the process did not complete running.

E. **Not completed** – Indicates that this process failed to complete. There are various reasons why this might happen, for example, if the process was manually stopped, or invalid data was entered.

F. **View issues** – Opens a new screen displaying more information about why the process failed to run correctly.

G. **View parameters** – Opens a new screen displaying the values you entered for start-up parameters. Only start-up parameters will display on this screen. If you provided mid-process inputs during the session, these do not display.

H. **Back to top** – Returns you to the first entry in the list.

View issues

If a process does not successfully complete, you can see more information about why it failed by clicking the **View issues** link. The name of the process and its start time display, followed by a message that explains why it failed.
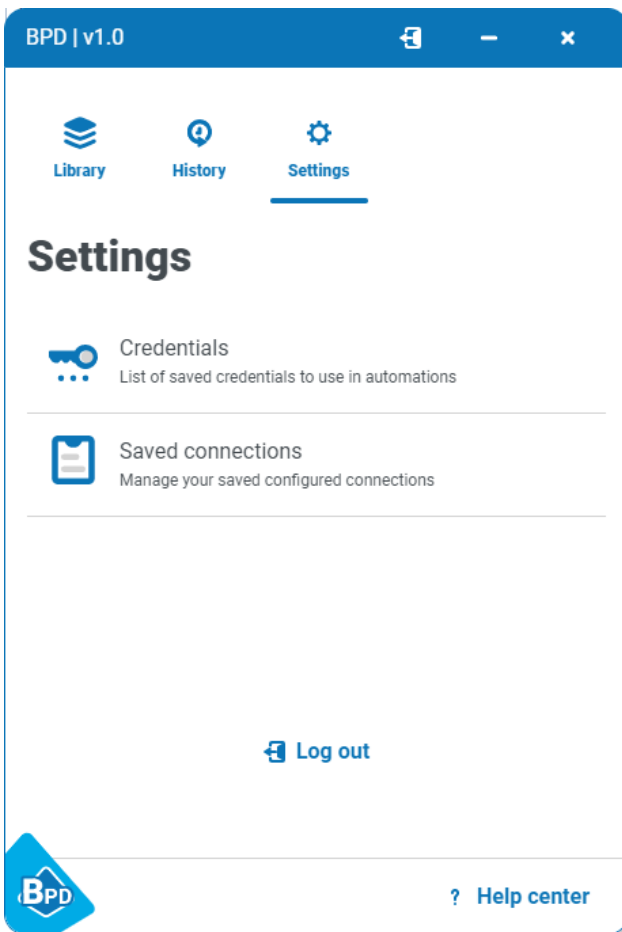
In this example, you can see that the user manually stopped the process while it was running, by clicking **Stop the process**.

If you need help to fix the problem, you should give this information to your system administrator. They are able to view a complete session log with more detailed information about all the processes that you have run, any additional information you entered, and details of why a process failed.

Settings

Select the **Settings** tab to view and configure your credentials and your connections.

The options on the Settings tab are:

- **Credentials** – Displays a list of credentials stored on your computer. Blue Prism Desktop will use these when it logs into another application on your computer to run a process. See Configure credentials on page 32.

- **Saved connections** – Displays a list of configured connections available to you. You can import and add new connections, and can edit and delete existing connections. See Configure connections (after login) below.

Configure connections (after login)

You can add a new connection, or multiple connections, by importing a connection configuration file via **Settings** > **Saved connections**. You can also configure connections on the Welcome screen before logging in, see Configure connections (before login) on page 9.

Alternatively, you can create a new connection yourself using the details of a Desktop environment, if known. You can also edit and delete connections (you cannot edit or delete the connection you are currently using), if you require assistance, please contact your system administrator. The actions you are permitted to perform on connections will depend on your organization's policy, so please contact your system administrator for assistance.

To configure a connection, click **Saved connections**. The Saved connections screen displays.

The following options are available:

A. **Import Connection** – Add one or more new connections by importing a connection configuration file usually supplied by your system administrator, see Import a connection on the next page.

B. **Add connection** – Add a completely new connection (if your organization allows this), see Create a new connection on page 28.

C. **Edit connection** – Edit the configuration details of this connection, see Edit a connection on page 31.

D. **Delete connection** – Delete this connection, see Delete a connection on page 32.

Depending on your organization's Blue Prism Desktop environment configuration, you might only have one available connection, or, if you have access to more than one environment, you can have multiple connections available for your account.

Import a connection

> Connection names must be unique. If you import a connection with the same name as an existing one, the existing connection will be overwritten.
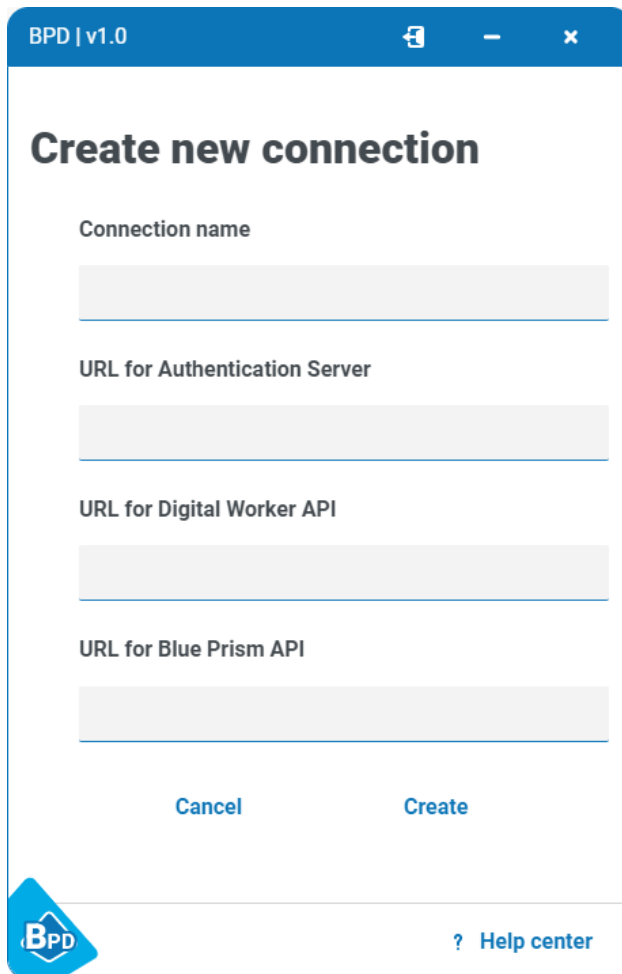
1. On the Saved connections screen, click **Import connection** and navigate to the connection configuration import file.

2. Click **Open**.

   The connection configuration file is uploaded. The connections configured in the file (there can be more than one per file) are added to your list of saved connections. You can now select the required connection from the Welcome screen and log in.

Create a new connection

1. On the Saved connections screen, click **Add connection**.

    The Create new connection screen displays.

2. Enter the connection details, as prompted. All the fields are mandatory.

Field name	Information required
Connection name	Enter a name for this connection. Connection names must be unique, and are case-sensitive.
	✎ If you try to create a new connection with the same name as an existing one, a warning message displays and you cannot save the connection.
URL for Authentication Server	Enter the Authentication Server URL, but do not include https:// in the URL.
	⚠ To ensure a secure connection is used, all Authentication Server URLs must include https://. This has therefore been hard-coded into the field and does not need to be entered.
URL for Digital Worker API	Enter the URL of the Digital Worker API to which you want to connect.
URL for Blue Prism API	Enter the URL of the Blue Prism API to which you want to connect.

3. Click **Create** to add the new connection.

    The connection is created and displays on the Saved connections screen.
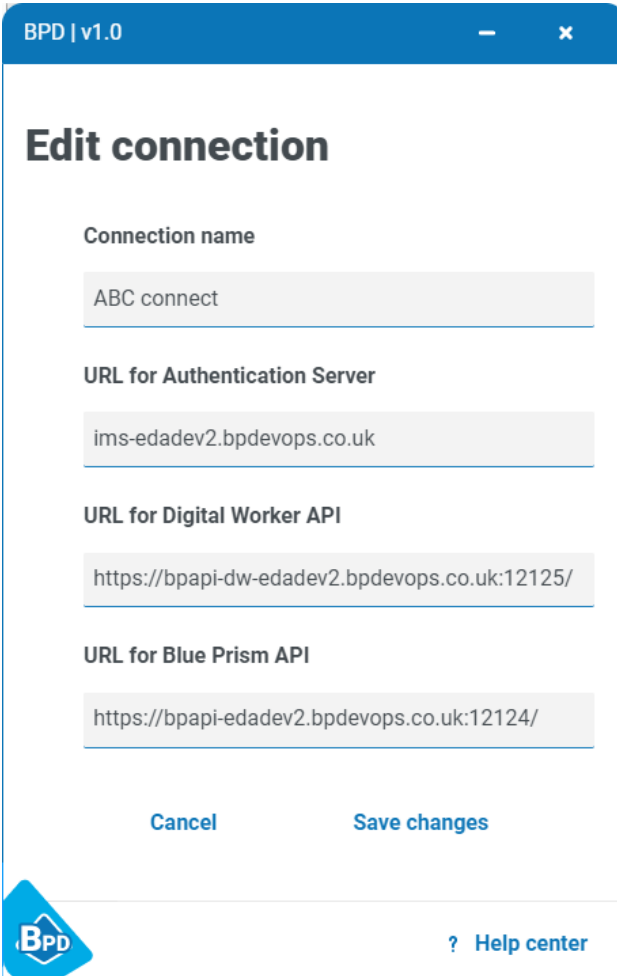

To use this new connection, you must log out, then select this connection on the Welcome screen and log in.

Edit a connection

> ✏️ You cannot edit the connection that you are currently using. If you need to do this, you will first need to log out, and you can then edit the connection from the Welcome screen, see Edit a connection on page 14.

1. On the Saved connections screen, click the Edit connection icon ✏️ .

    The Edit connection screen displays.

    ### Edit connection

    Connection name

    ABC connect

    URL for Authentication Server

    ims-edadev2.bpdevops.co.uk

    URL for Digital Worker API

    https://bpapi-dw-edadev2.bpdevops.co.uk:12125/

    URL for Blue Prism API

    https://bpapi-edadev2.bpdevops.co.uk:12124/

    Cancel   Save changes

    ? Help center

2. Edit the connection details as required.

3. Click **Save changes**.

    The connection is updated and the Saved connections screen displays.

Delete a connection

⚠ This action deletes the connection from your account and cannot be undone.

✎ You cannot delete a connection that you are currently using. If you need to do this, you will first need to log out, and you can then delete the connection from the Welcome screen.

1. On the Saved connections screen, click the Delete connection icon 🗑.
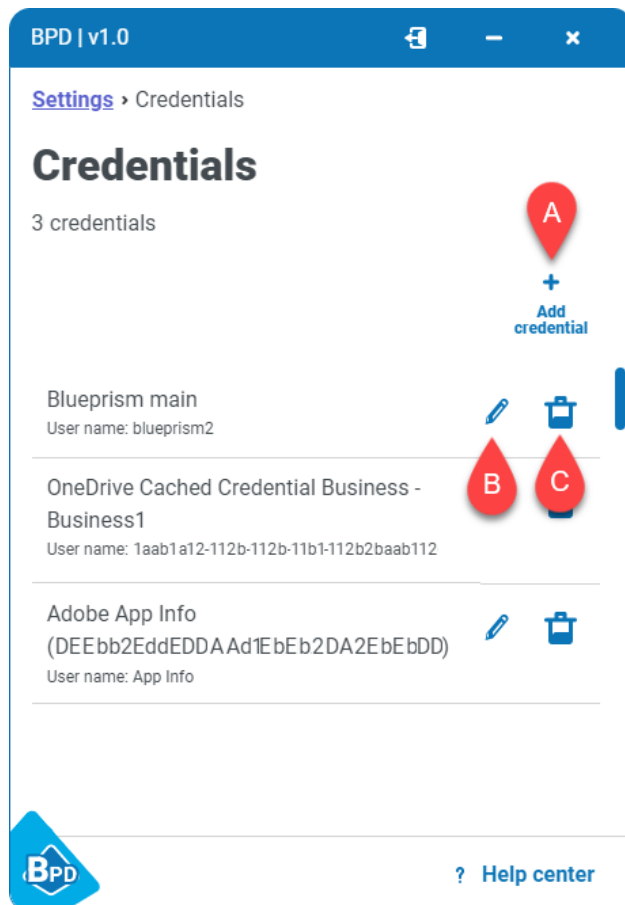
    A message displays asking you to confirm the delete.

2. Click **Yes, delete**.

    The connection is deleted from your account and the Saved connections screen displays.

Configure credentials

To configure your credentials (if your organization allows this), on the Settings tab, click **Credentials**. The Credentials screen displays.

The following options are available:

A. Add a credential, see Add a new credential on the next page.

B. Edit a credential, see Edit a credential on page 35.

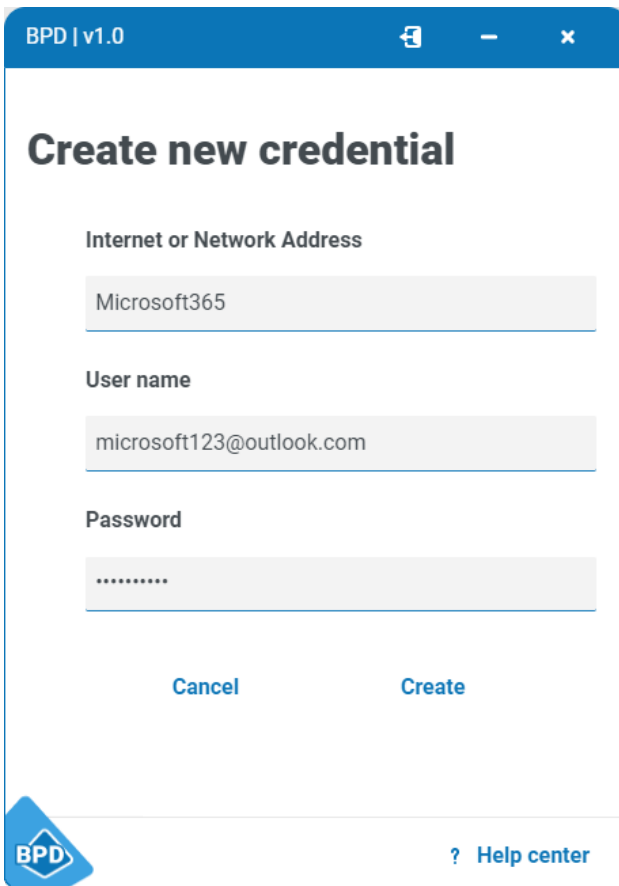C. Delete a credential, see Delete a credential on page 35.

These are your login credentials for the applications you use, and are stored in the credential store on your computer. You can also view them via **Control Panel** > **User Accounts** > **Credential Manager** > **Windows Credentials** > **Generic Credentials**.

Add a new credential

1. Click **Add credential**.

   The Create new credential screen displays.

2. Enter the credential details, as prompted.

   > ✎ If you create a credential with the same entry for Internet or network address as an existing one, the existing credential will be overwritten.

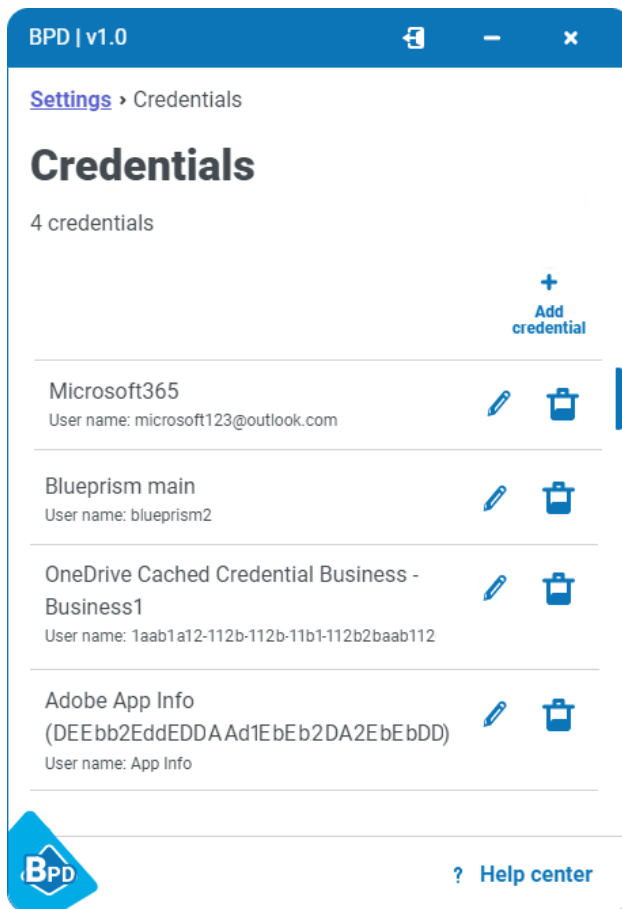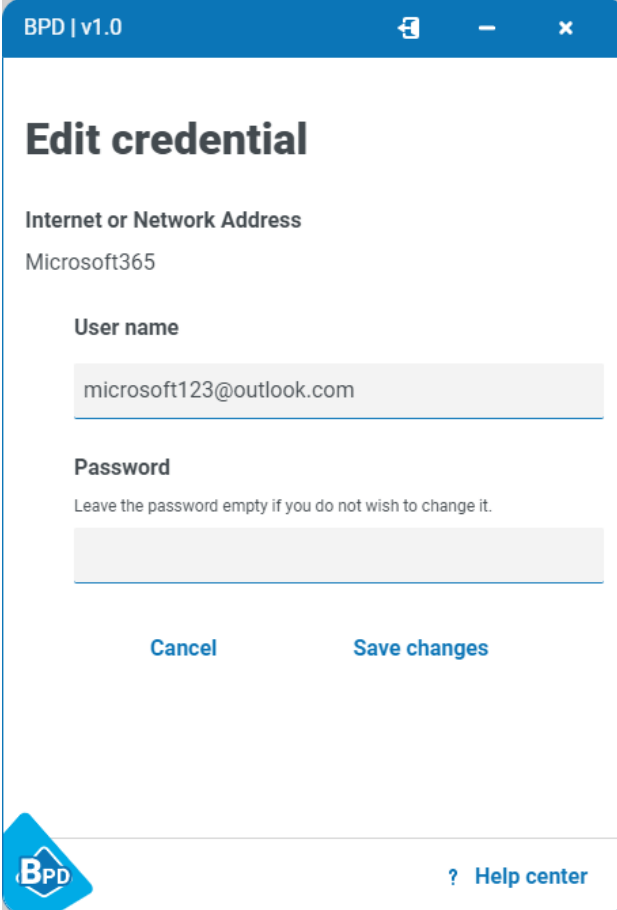| Field name	Information required
Internet or Network Address	An identifier for the credential, for example the internet or network address the credential will connect to.
User name	Enter the user name for the credential.
Password	Enter the password for the credential. For security, the characters are displayed as asterisks. This field is mandatory when adding a new credential, but is optional when editing one.

3. Click **Create** to add the new credential.

    The credential is created and displays on the Credentials screen, and is also visible in your Windows Credential Manager.

Edit a credential

1. Click the Edit credential icon 🖉 for the credential you want to update.

   The Edit credential screen displays.

2. Edit the user name and/or password fields as required. Leave the password field blank if you do not want to change it.

   > 🖉 For security reasons the existing password is not shown, and if you enter a new password the characters display as asterisks.

3. Click **Save changes**.

   The credential is updated in your account and the Credentials screen displays.

Delete a credential

> ⚠ This action deletes the credential from your account and cannot be undone.

1. On the Credentials screen click the Delete credential icon 🗑 for the credential you want to delete.

   A message displays asking you to confirm the deletion.

2. Click **Yes, delete**.

   The credential is deleted from your account and the Credentials screen displays.